

Whether you're talking about a tourism destination, hotel, or travel brand, it's difficult to market across entire generations of travellers. It's more effective to identify psychographic segments - types of travellers who, regardless of age or gender, share similar attitudes, interests and behaviours.

Tourism Australia has embarked on a journey to transition from predominantly demographically defined and based target audiences across markets, to a global behavioural and attitudinal target audience. This transformation is underpinned by the development of the High Value Traveller (HVT) segment.

## DEFINITION OF A HIGH VALUE TRAVELLER



### TRAVEL LONG HAUL

Travels long haul (out of region) on a regular basis.



### PREFERENCE FOR AUSTRALIA

Consideration to visit Australia in the short or long term.



### KEY DRIVERS FOR DESTINATION CHOICE

Food and wine, aquatic and coastal, and nature and wildlife experiences are key drivers when choosing a holiday destination.



### REPRESENT HIGH VALUE

Above average trip expenditure. Higher likelihood to stay longer. Higher likelihood to disperse further.

High Value Travellers (HVTs) are empowered and increasingly knowledgeable about the world around them. They know what they want, when they want it and where they want to get it. As such, HVTs view knowledge about a destination as fundamental to an enriching travel experience. That experience starts well before they board a ship or plane, but rather as they seek out and discover new travel content online.

So when it comes to travel, HVTs prefer authentic holidays where they can experience the local culture and get a taste of everyday life. With their eyes, ears and mind wide open, they travel to expand their horizons to become more knowledgeable of the world we live in. This means getting a taste for everything from the local cuisine to the natural surroundings. Especially when it's a destination they've not yet travelled to.



# 5.5M

High Value Travellers in the Germany






of which  
**1.6M**

are considering visiting Australia in the next four years

and a further  
**3.9M**

not considering Australia in the next four years

## DID YOU KNOW?

-  **98%** Enjoy escaping day-to-day life when travelling
-  **97%** Travel to enrich their knowledge of the world
-  **96%** Like to get a taste for the local cuisine when travelling
-  **94%** Like to travel to places they haven't been before
-  **94%** Like authentic holidays where they can experience local culture

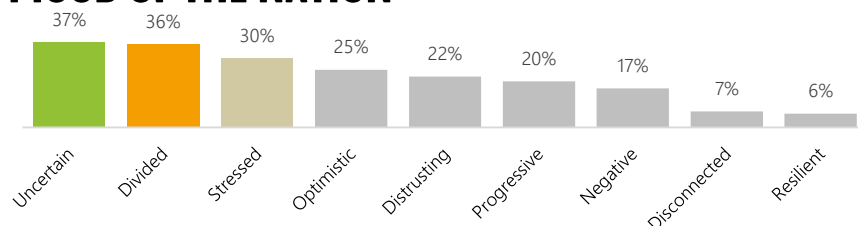


represents  
**~44%**  
of the German long haul travel market



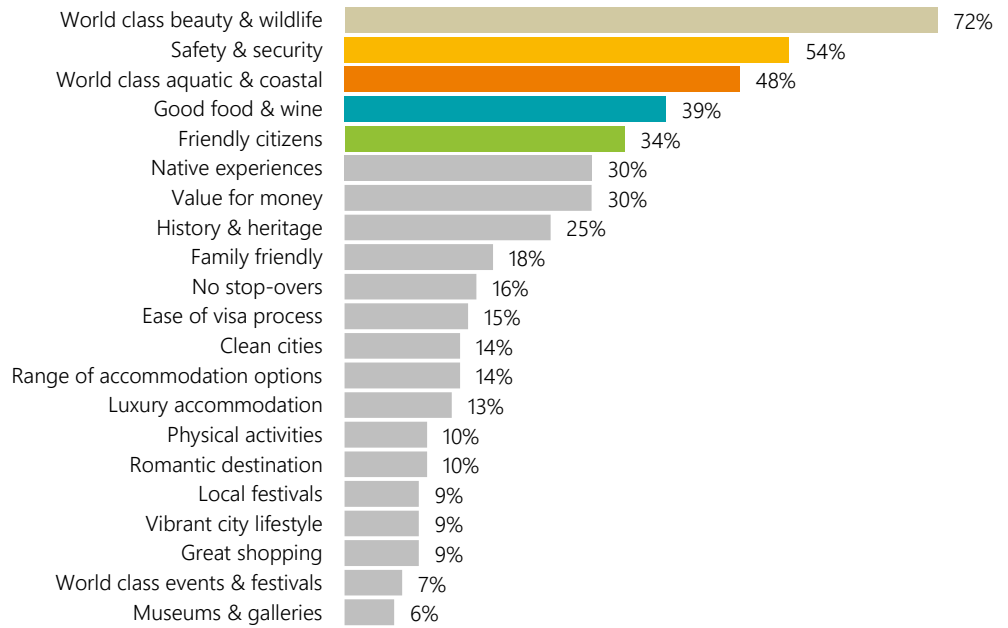
Staying an average  
**16 NIGHTS**

## MOOD OF THE NATION



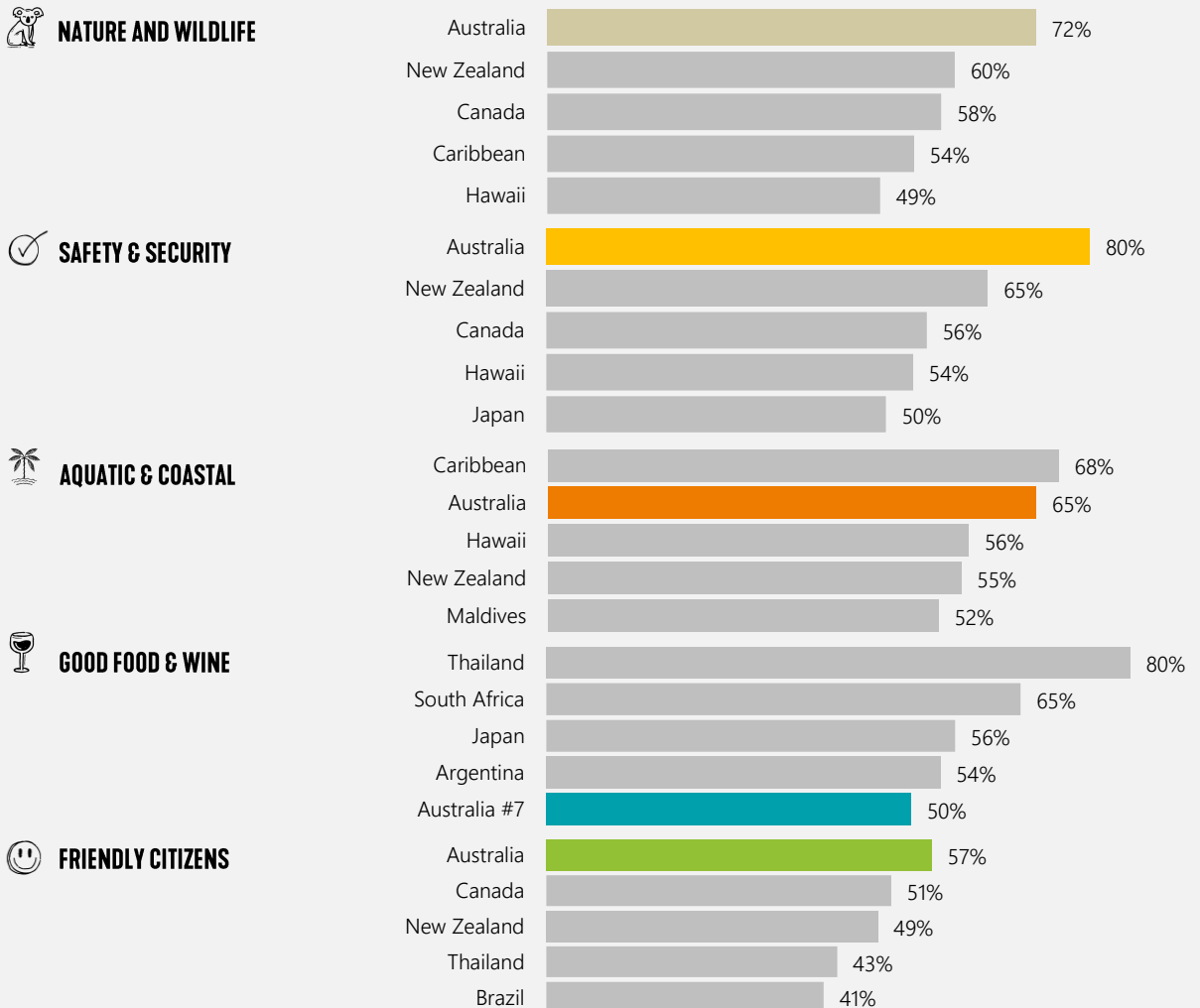
Spending  
**2-3X**  
more than the average traveller<sub>1</sub>

# DRIVERS OF DESTINATION CHOICE



Read as: 72% of German HVTs state beauty and wildlife is the most important driver for destination choice.

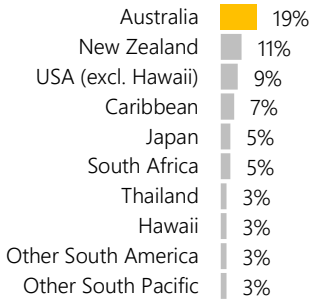
## AUSTRALIA'S ASSOCIATION TO DRIVERS OF DESTINATION CHOICE



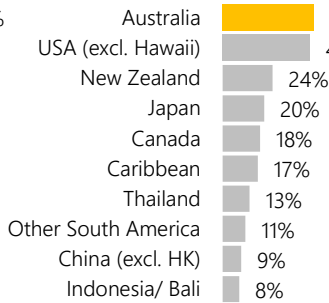
Read as: 72% of German HVTs associate Australia as the top destination for nature and wildlife.

# DEMAND FOR AUSTRALIA

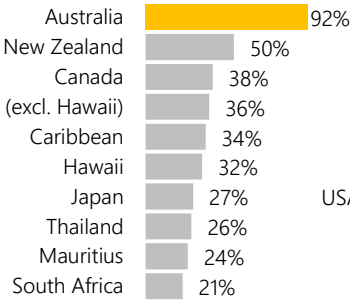
## MOST DESIRABLE DESTINATIONS



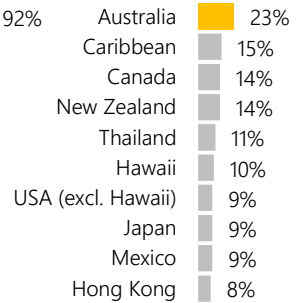
## MOST FASHIONABLE DESTINATIONS



## CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



## INTENTION TO VISIT (IN THE NEXT 2 YEARS)

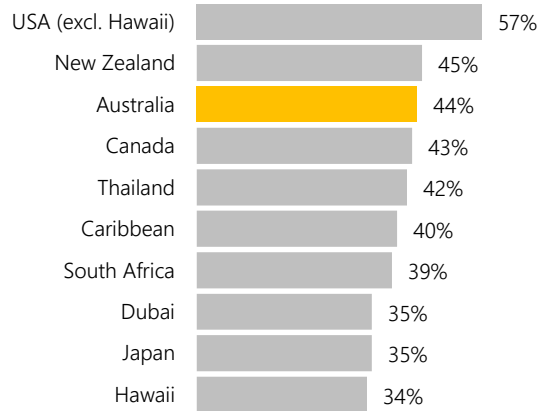


Read as: 19% of German HVTs state Australia is their most desirable destination.



Whitsundays, Queensland

## AWARENESS OF HOLIDAY EXPERIENCES



## ✓ DRIVERS FOR CHOOSING AUSTRALIA



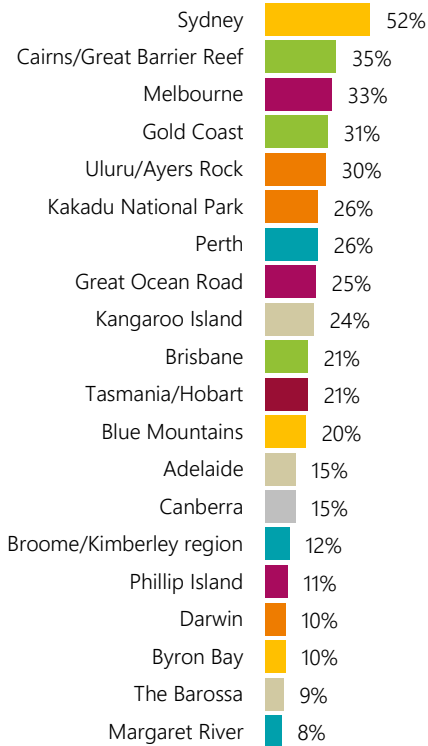
## ⚠ BARRIERS FOR NOT CHOOSING AUSTRALIA



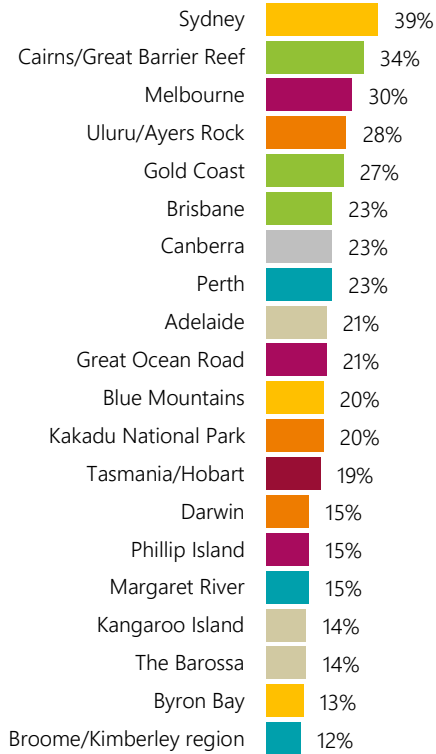
Read as: 73% of German HVTs identify Australia as a destination that is exciting to travel to.

# DEMAND FOR AUSTRALIA

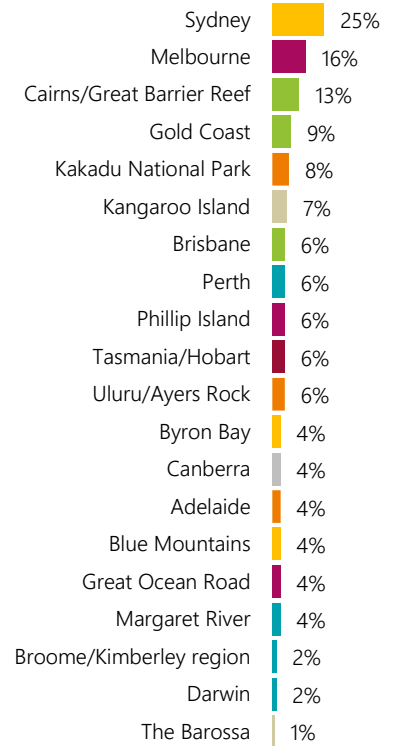
## CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



## AWARENESS OF EXPERIENCES WITHIN AUSTRALIAN DESTINATIONS



## INTENTION TO VISIT (IN THE NEXT 2 YEARS)



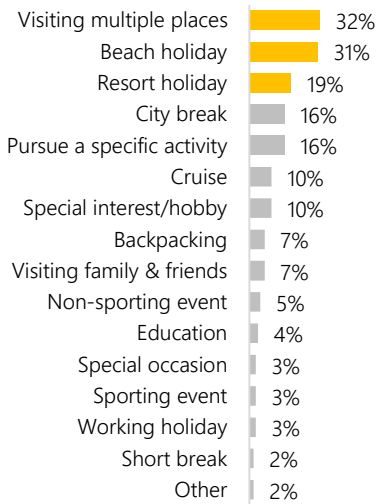
Read as: Of all German HVTs considering Australia, 52% are considering visiting Sydney in the next 4 years.



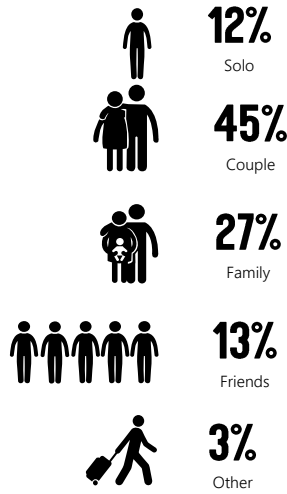
Blue Mountains, New South Wales

# TRIP BEHAVIOUR

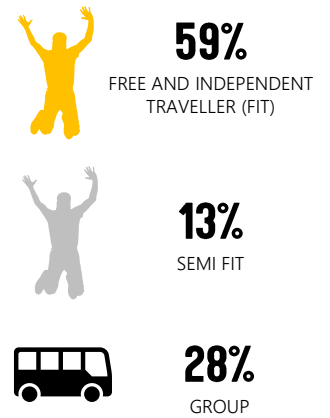
## TRIP TYPE



## TRAVEL PARTY

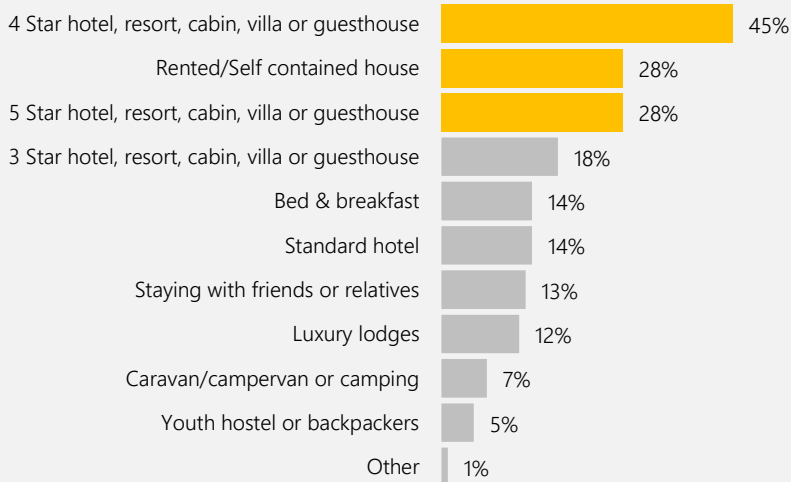


## TRAVEL STYLE

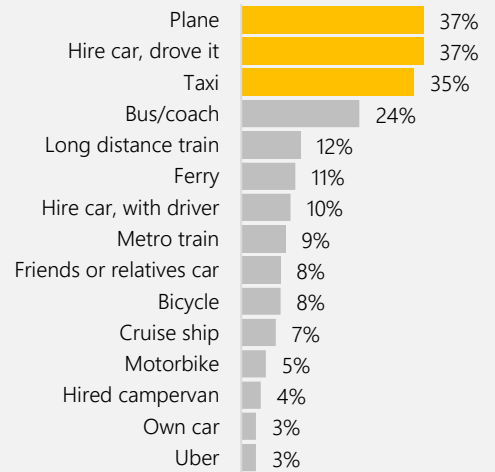


Read as: 32% of German HVTs stated their last holiday was to visit multiple places.

## ACCOMMODATION TYPE

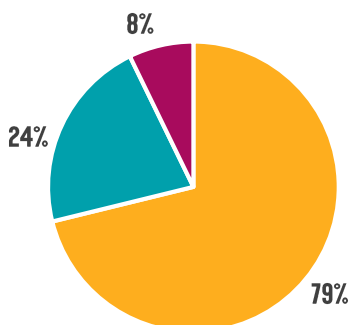


## TRANSPORT



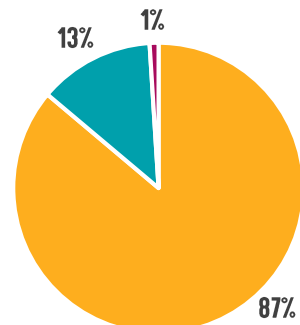
Read as: 45% of German HVTs prefer 4-star accommodation.

## BOOKING LEAD TIME FOR ACCOMMODATION



- Booked well in advance of my trip
- Booked not long before my trip
- Booked while on my trip

## BOOKING LEAD TIME FOR FLIGHTS

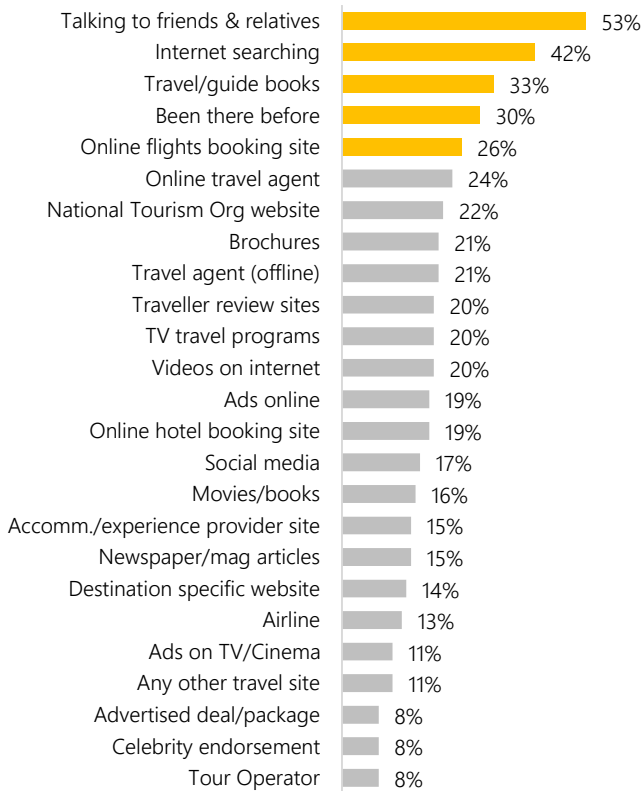


- Booked well in advance of my trip
- Booked not long before my trip
- Booked while on my trip

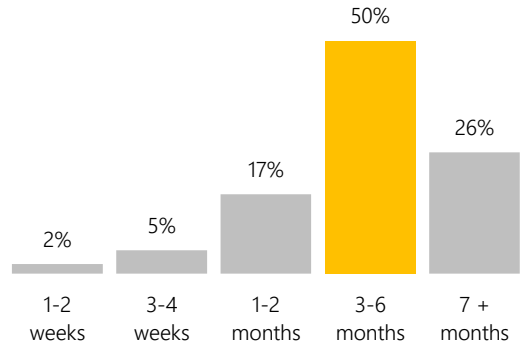
Read as 79% of German HVTs book accommodation well in advance of their trip

# PLANNING AND BOOKING

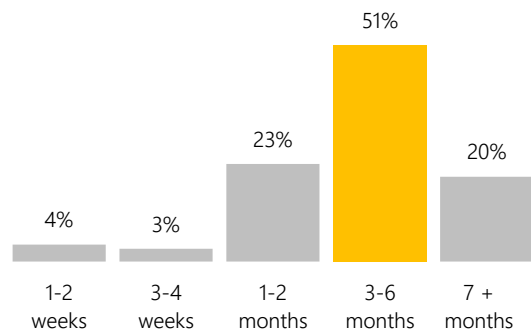
## PLANNING SOURCES



## DESTINATION CHOICE LEAD TIME

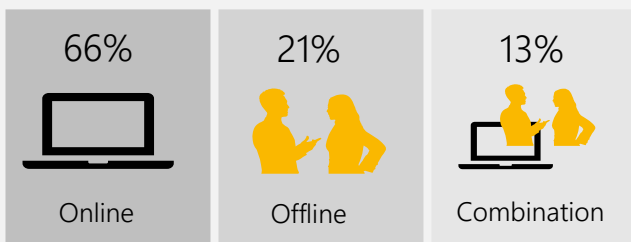


## BOOKING LEAD TIME



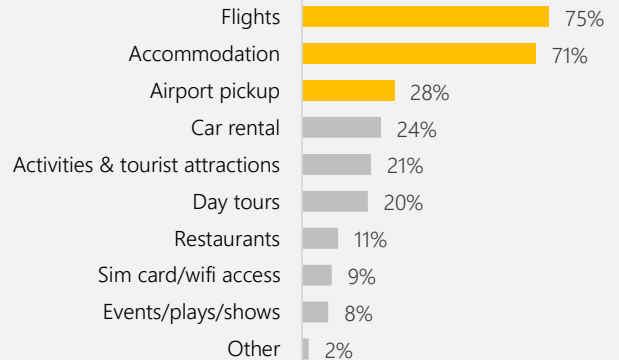
Read as: 50% of German HVTs select a destination 3-6 months before they travel.

## ONLINE VS. OFFLINE BOOKING

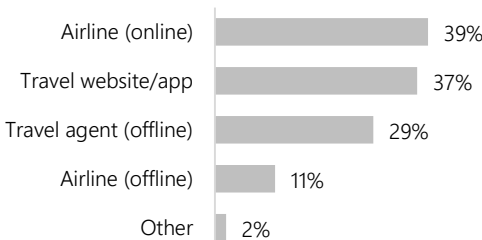


Read as: 66% of German HVTs book online, while 21% book through offline sources.

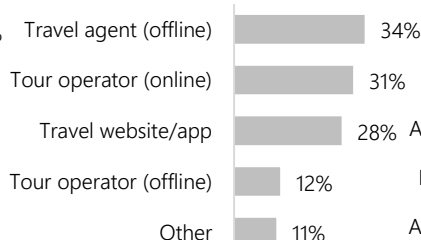
## BOOKED PRIOR TO DEPARTURE



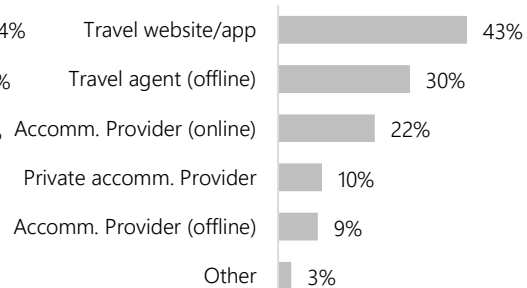
## FLIGHT BOOKINGS



## TOUR BOOKINGS



## ACCOMODATION BOOKINGS



Read as: 39% of German HVTs booked flights directly through an airline website on their last trip.