

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.



**20.4M**

High Value Travellers in the China






of which  
**10.8M**

are considering visiting Australia in the next four years

and a further  
**9.6M**

not considering Australia in the next four years

## DID YOU KNOW?

-  **99%** Travel to become more open-minded of the world
-  **99%** Focus on mental and physical health and wellbeing when travelling
-  **99%** Look for purposeful travel that gives back to the destination
-  **99%** Like authentic holidays where they can experience the local culture
-  **97%** Prefer to holiday where they can see nature and be in a natural setting



represents

**~41%**

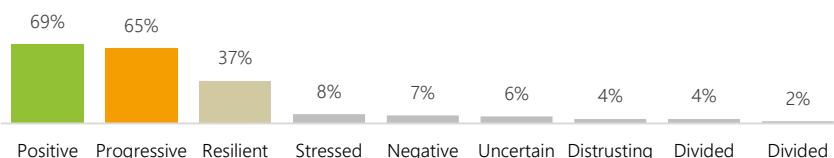
of the Chinese long haul travel market



Staying an average

**7 NIGHTS**

## MOOD OF THE NATION

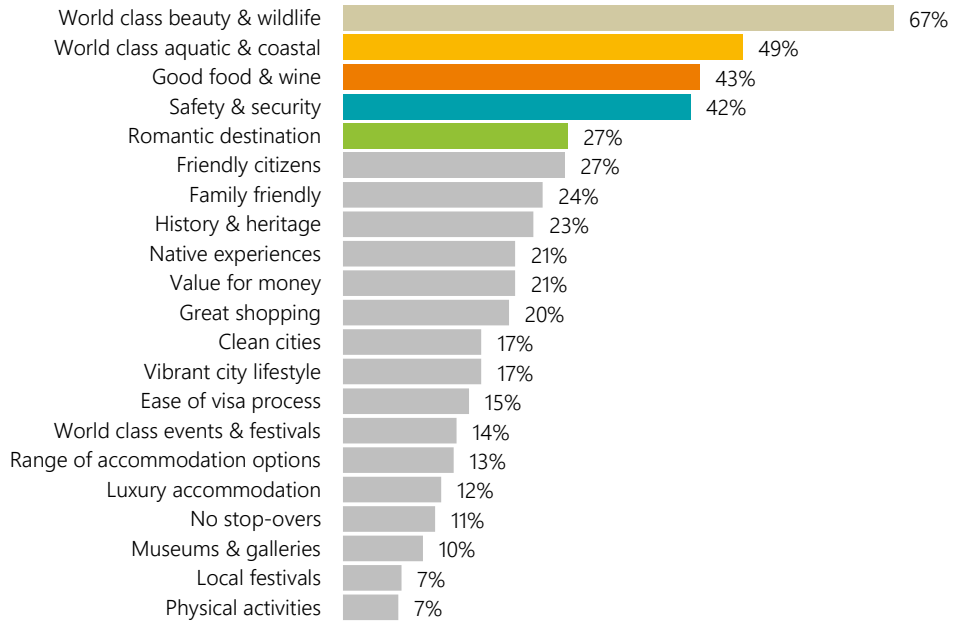


Spending

**2-3X**

more than the average traveller<sub>1</sub>

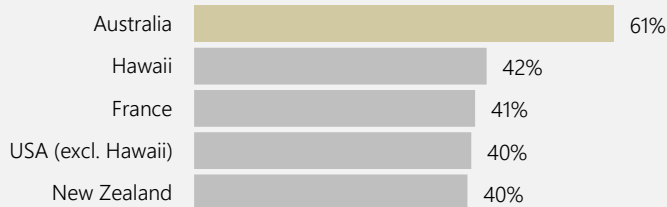
# DRIVERS OF DESTINATION CHOICE



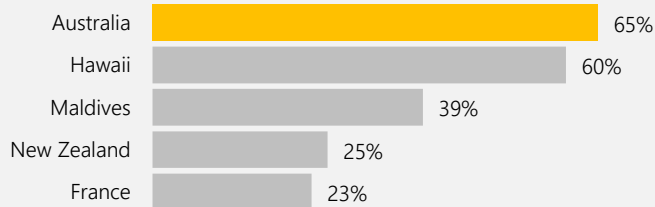
Read as: 67% of Chinese HVTs state beauty and wildlife is the most important driver for destination choice.

## AUSTRALIA'S ASSOCIATION TO DRIVERS OF DESTINATION CHOICE

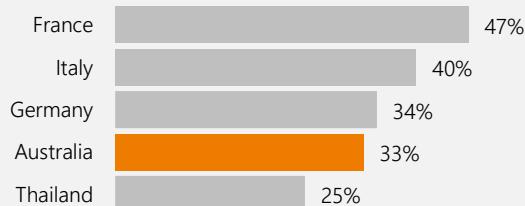
### NATURE & WILDLIFE



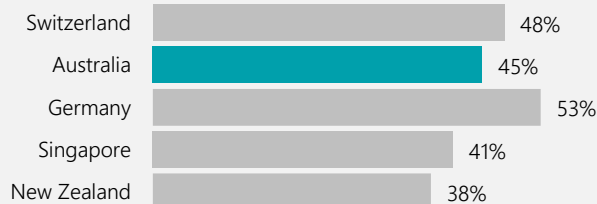
### AQUATIC & COASTAL



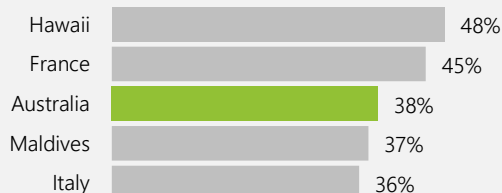
### GOOD FOOD & WINE



### SAFETY & SECURITY



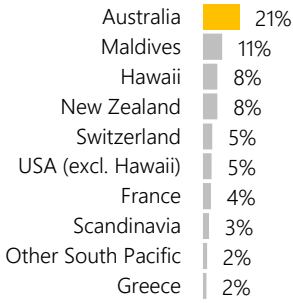
### ROMANCE



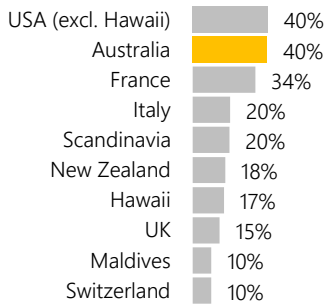
Read as: 61% of Chinese HVTs associate Australia as the top destination for nature and wildlife.

# DEMAND FOR AUSTRALIA

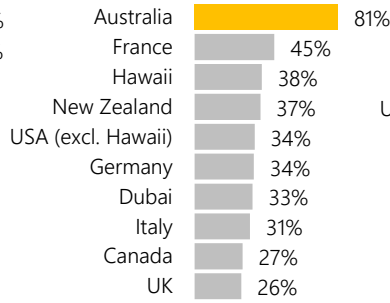
## MOST DESIRABLE DESTINATIONS



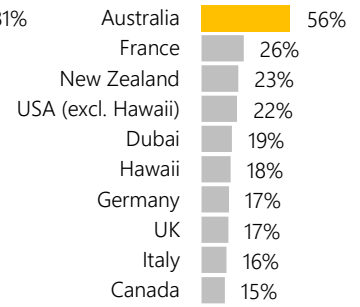
## MOST FASHIONABLE DESTINATIONS



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



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

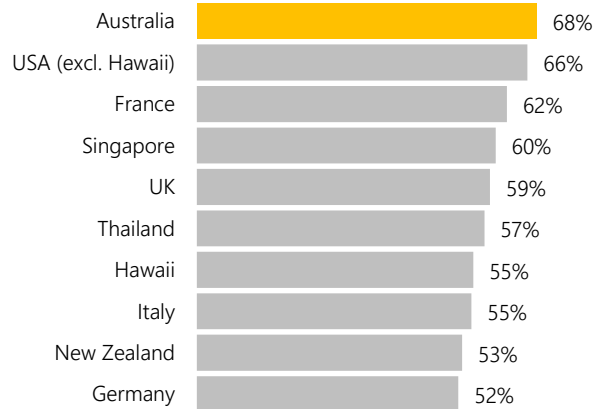


Read as: 21% of Chinese HVTs state Australia is their most desirable destination.



Injidup Natural Spa, Western Australia

## AWARENESS OF HOLIDAY EXPERIENCES



## ✓ DRIVERS FOR CHOOSING AUSTRALIA



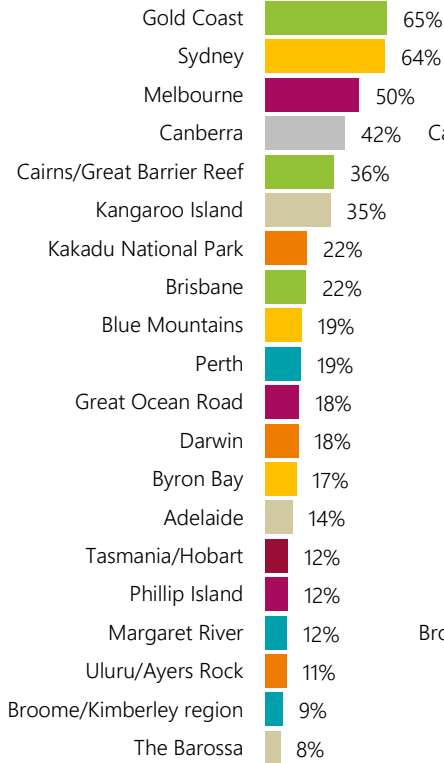
## ⚠ BARRIERS FOR NOT CHOOSING AUSTRALIA



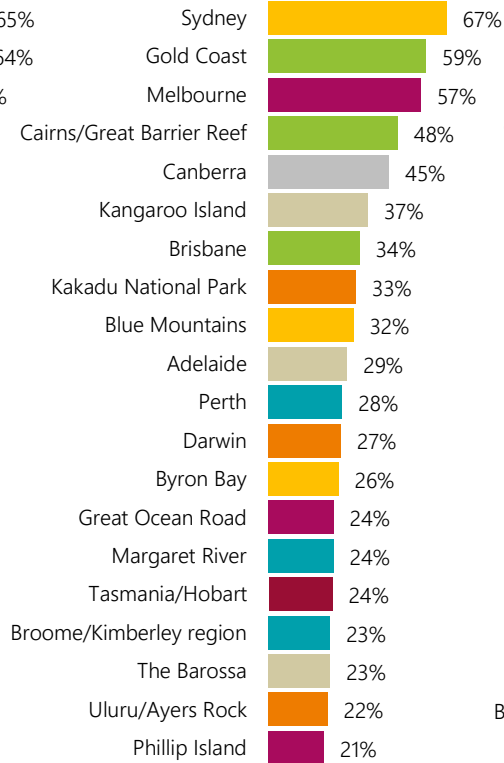
Read as: 57% of Chinese HVTs identify Australia as a destination that provides activities and attraction they are interested in.

# DEMAND FOR AUSTRALIA

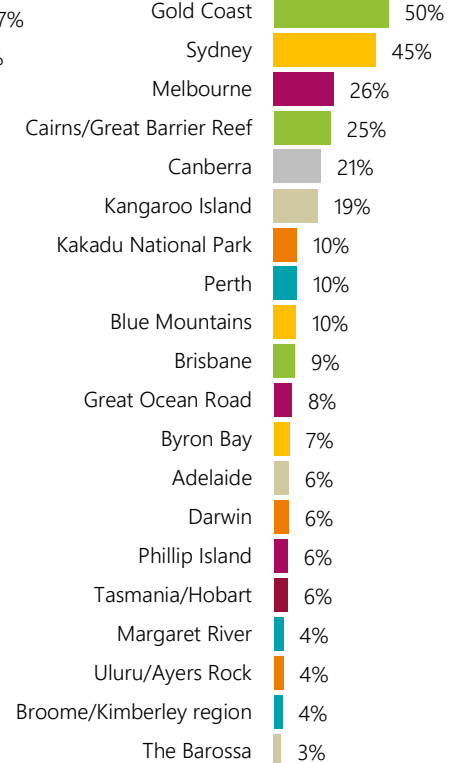
## CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



## AWARENESS OF EXPERIENCES WITHIN AUSTRALIAN DESTINATIONS



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



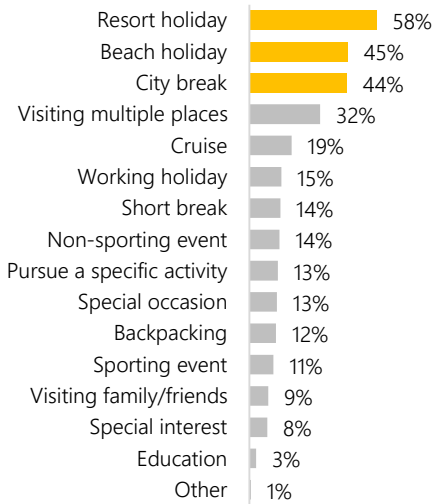
Read as: Of all Chinese HVTs considering Australia, 65% are considering visiting the Gold Coast in the next 4 years.



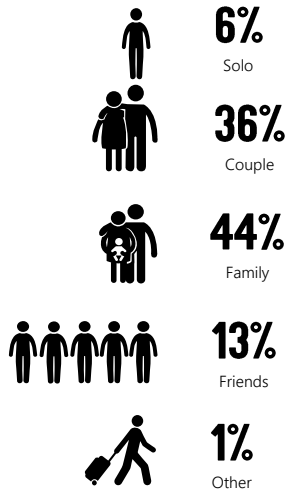
Uluru, Northern Territory

# TRIP BEHAVIOUR

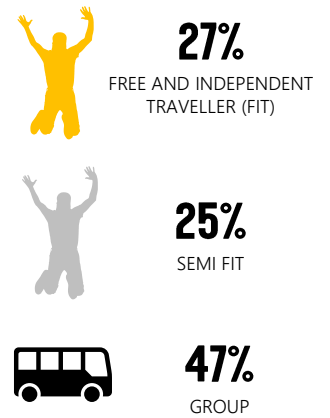
## TRIP TYPE



## TRAVEL PARTY

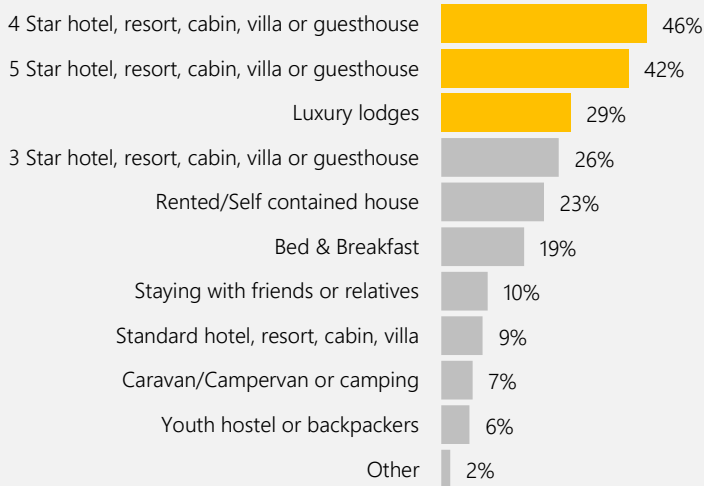


## TRAVEL STYLE

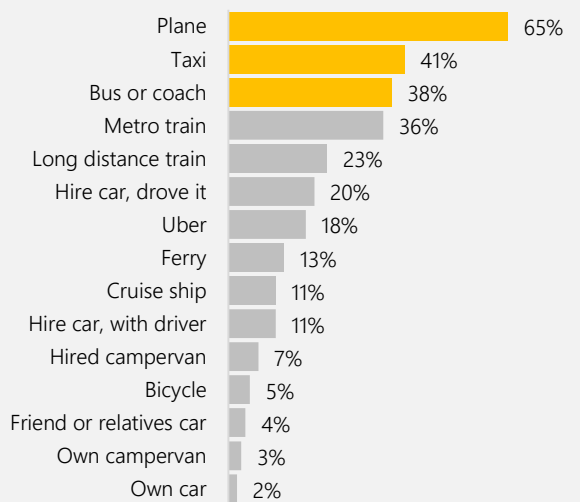


Read as: 58% of Chinese HVTs stated their last holiday was a resort holiday.

## ACCOMMODATION TYPE

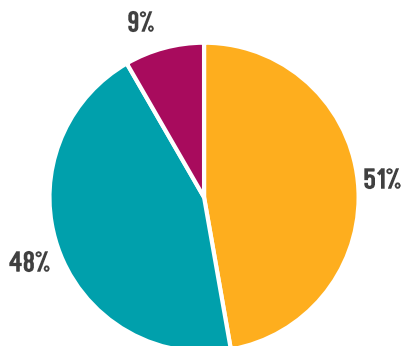


## TRANSPORT



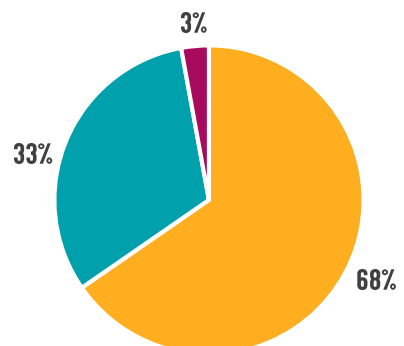
Read as: 46% of Chinese HVTs prefer 4-star accommodation.

## 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

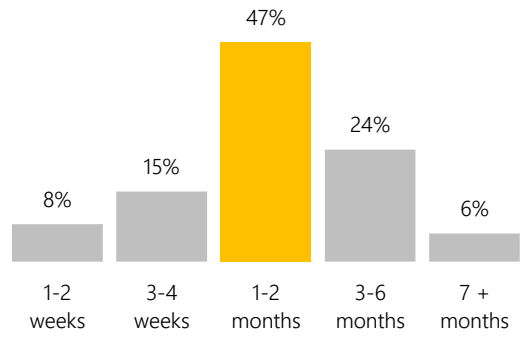
Read as 51% of Chinese HVTs book their accommodation well in advance.

# PLANNING AND BOOKING

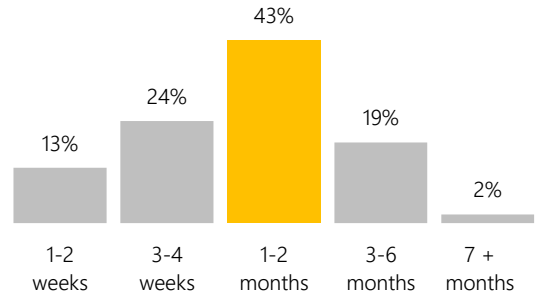
## PLANNING SOURCES



## DESTINATION CHOICE LEAD TIME

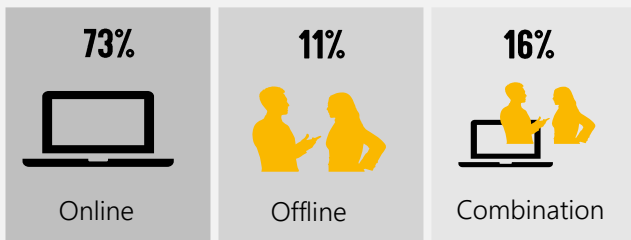


## BOOKING LEAD TIME



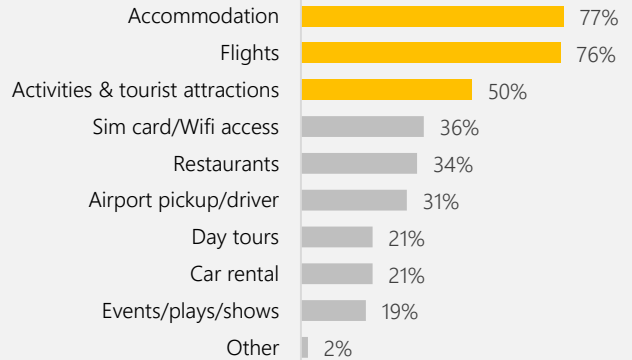
Read as: 47% of Chinese HVTs select a destination 1-2 months before they travel.

## ONLINE VS. OFFLINE BOOKING

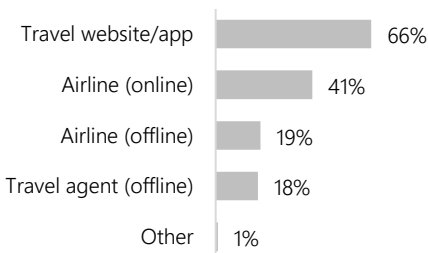


Read as: 73% of Chinese HVTs book online, while 11% book through offline sources.

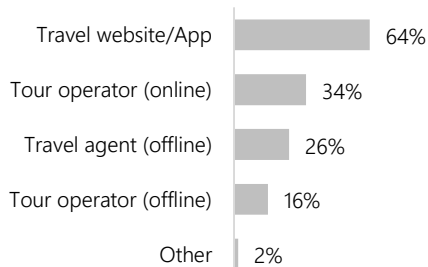
## BOOKED PRIOR TO DEPARTURE



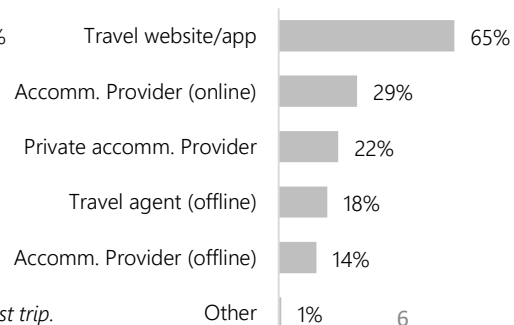
## FLIGHT BOOKINGS



## TOUR BOOKINGS



## ACCOMODATION BOOKINGS



Read as: 66% of Chinese HVTs booked flights directly through a travel website/app on their last trip.