THE FUTURE OF TOURISM DEMAND

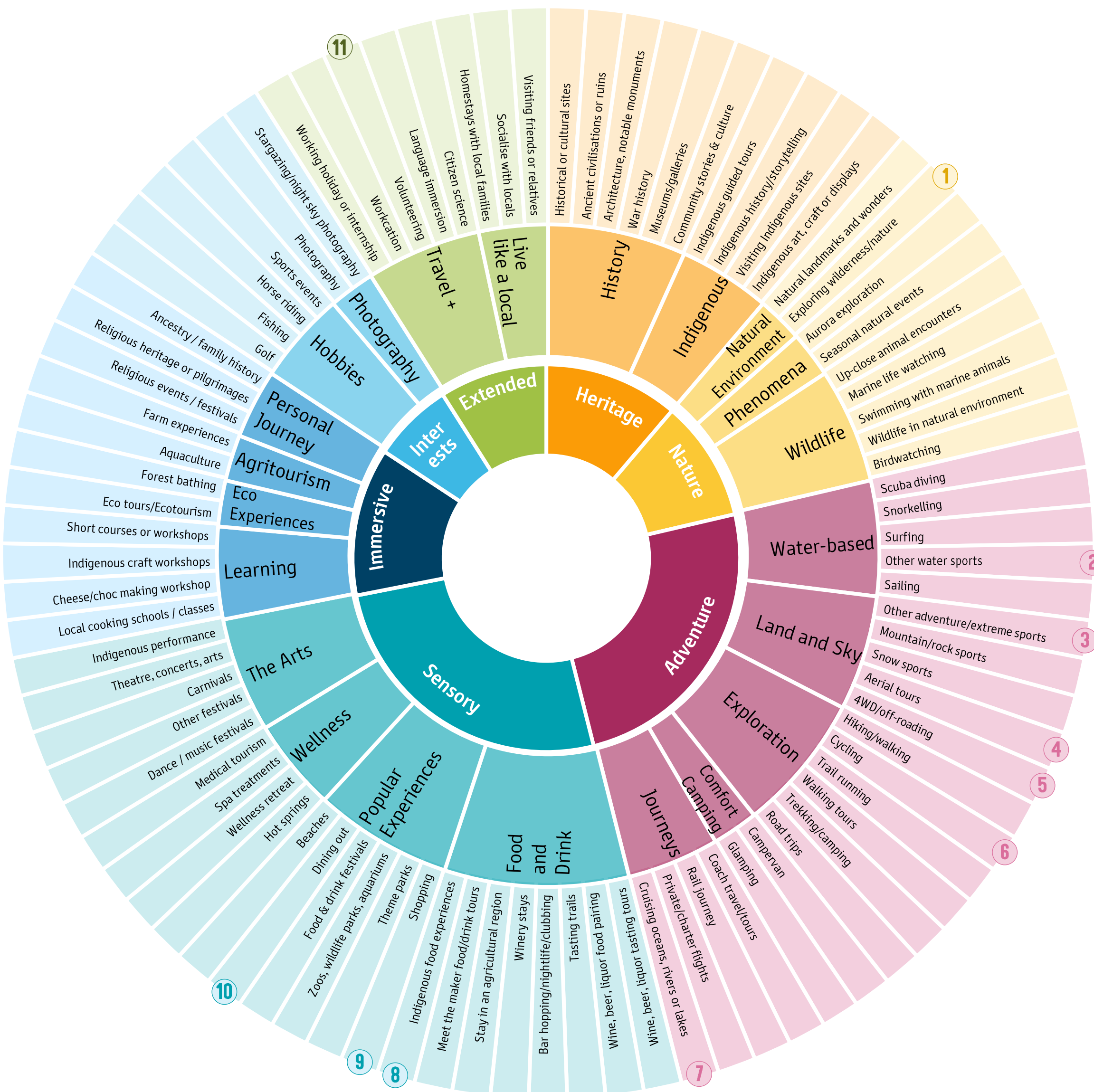
Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. Based on qualitative research and a global survey of 23,771 travellers across 20 markets, the research measured interest in 143 global tourism experiences (89 primary and 54 sub-experiences).

EXPERIENCE SECTOR MAPPING

To create a traveller-led view of tourism sectors, the 89 tested experiences were clustered based on overlapping traveller demand, i.e. experiences sharing a high degree of crossover grouped together most closely. This analysis revealed seven broad 'clusters' and 22 sub-clusters of related experiences, which can be used to target travellers, destinations and itineraries effectively. Individual experiences are explored in detail through the following infographics.

Click on any experience you are interested in below to navigate to a dedicated fact sheet.

HERITAGE	NATURE	ADVENTURE	SENSORY	IMMERSIVE	INTERESTS	EXTENDED
Experiencing a destination's history through its places and people	Immersion into nature via landmarks and wildlife	Activity and exploration	Enjoyment via good food and drink, sightseeing and culture	Learning, development and education	Hobbies and passion points	Full immersion into local culture



11
- Animals/ wildlife sanctuaries
- Education
- Working with children/ orphanages
- Environmental conservation
- Marine conservation
- Community development/ welfare
- Humanitarian/ medical/ healthcare
- Disaster recovery

10
- Unique cuisine or local specialties
- Street food
- Fine dining/ renowned chefs
- Casual or mid-range dining
- Range of multicultural food options
- Fresh produce
- Fresh seafood

9
- World-class brand names
- Outlet/duty free
- Local handicrafts
- Souvenirs

8
- Dining
- Chef's feast
- Fishing/hunting
- Foraging/gathering

1
- Alpine
- Desert
- Gardens
- Rainforest/jungle
- Waterfalls
- Rivers/lakes
- Marine (ocean/reefs)
- National/state parks

2
- Paddle sports
- Kitesurfing or windsurfing
- Parasailing
- Water skiing
- Jet skiing
- Rafting
- River tubing

3
- Quad biking/ATV
- BMX/ motocross
- Ziplining
- Hang-gliding/ paragliding
- Skydiving
- Bungee jumping
- Skateboarding

4
- Hot air balloon
- Scenic flights
- Helicopter rides

5
- Guided tour
- Self-drive

6
- Road cycling
- Mountain biking

7
- Small vessel
- Large vessel

fiftyfive5

DENOTES SUB-EXPERIENCE

TOURISM AUSTRALIA

ABOUT THIS RESEARCH

Given the pace and scale of change in Australia's tourism industry, a view on current and future demand patterns is timely. The *Future of Tourism Demand* is the most comprehensive view on global demand undertaken by Tourism Australia to date, developed with the sole intent of helping our industry find and convert demand in this crucial recovery moment.

Tourism was the third largest export in Australia before the pandemic, employing one in every thirteen Australians. But while tourism is big business, the industry is made up of around 300,000 very small businesses. Recognising the lean nature of many tourism businesses, we have endeavoured to provide a high level of insights across all sectors.

This is a rich data source, but we realise it is also relatively complex. We've tried to simplify it as much as possible and give examples of how to use the insights. If you need a hand as you review the research, please reach out to insights@tourism.australia.com.

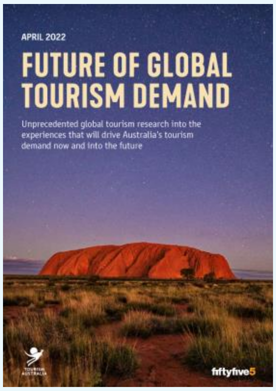
The research covers 143 experiences across 20 markets and four target audiences: the High Yield Traveller, Premium, Working Holiday Makers and a broader Long Stay audience. There were also three deep dive sections covering sustainable tourism, Indigenous insights and accessible travel.

This research was delivered with the support of state and territory tourism organisations and tourism industry operators from across Australia and our key markets. On behalf of the Tourism Australia team, our sincere thanks for your support and contribution to this work.

We sincerely hope that the insights in this research will help operators make better and more successful business decisions, and aid Australia's tourism industry to be even more competitive on the world stage than ever before.

To review the full report, experience fact sheets and market snapshots, visit
https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

MAIN REPORT

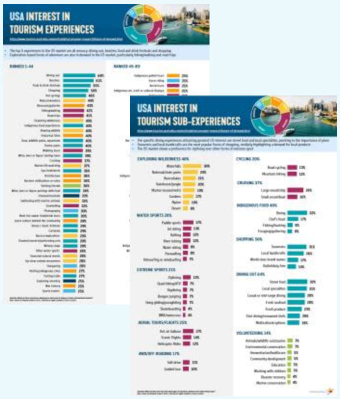


The main report brings together the wealth of data and insights from the research into a single, detailed document.

EXPERIENCE FACT SHEETS

Interest in the experience globally, by segment and by market; profiling of those interested; and cross-sell and partnership opportunities.

MARKET SNAPSHOTS



A snapshot for each of the 20 markets, plus a global summary, showing their interest in experiences and sub-experiences.

THE FUTURE OF TOURISM DEMAND

RESEARCH METHODOLOGY AND TIMINGS

Qualitative exploration | February-March 2022

Online community and focus groups with 240 High Yield Travellers across **10** key markets

Quantitative validation | April-May 2022

Online survey, 20 minutes in length, with 23,771 Out of Region travellers across **20** markets

MARKET COVERAGE

Tourism Australia remains committed to the core markets where it currently concentrates effort, as these markets represent the best opportunities for Australian tourism. Markets where Tourism Australia is active are China, Japan, India, Singapore, South Korea, the UK, the USA, Germany, Indonesia, Malaysia, France, Canada, New Zealand and Italy.

While Tourism Australia will continue to focus on its 15 markets, this research extends beyond our core international markets to include emerging markets, as well as the domestic Australian market, because Tourism Australia strives to provide tourism operators with the tools and information they need to make the best international marketing decisions for their businesses.

All markets covered by this research are listed below (with emerging markets in grey):

CHINA	JAPAN	INDIA	SINGAPORE	SOUTH KOREA
UK	USA	GERMANY	INDONESIA	MALAYSIA
FRANCE	CANADA	NEW ZEALAND	ITALY	HONG KONG (SAR)
TAIWAN	PHILIPPINES	VIETNAM	THAILAND	AUSTRALIA

INTERPRETATION NOTES WHEN READING THE INFOGRAPHIC SUMMARIES

- Interest in the experiences should be interpreted as:
  - ***Broad claimed interest***, recognising that not all will convert or already engage in these activities when travelling.
  - ***Global interest potential***, i.e. not specific to engaging in the experience in Australia, and not all travellers interested in the experience are considering or will travel to Australia.
- Understanding global and market-level interest:
  - ***Global data*** is an average of 19 markets (excluding Australia), with all markets weighted equally.
  - Differing survey response styles across markets means that care should be taken in comparing ***market-level*** interest levels (percentage interested in each experience) between markets.
  - ***Ranking analysis*** (showing where each market ranked a particular experience ranked out of the 89 experiences in each market) has been included to provide a more objective basis for comparison between markets. The market data shown in the experience fact sheets is sorted on this column.
  - ***Market sizing*** is included to compare the size of prize across markets, reflecting each market's estimated annual volume of out-of-region travellers aged 18-64.
- Understanding ***significance testing***:
  - The use of blue and red text shows figures that are higher or lower than those not interested in the experience at a 95% confidence level, meaning that we can be 95% confident we would see the same result if the study were to be repeated.
  - For ***market analysis***, significance testing shows whether an individual market's interest level is higher or lower than other international markets.
- Additional resources for understanding and interpreting the data contained in the fact sheets:
  - A glossary of terms, included in this guide.
  - A 'how-to' guide, showing an example fact sheet marked up with interpretation of various figures, included in this guide.
  - Key take-outs highlighted via insights on individual fact sheets.

EXPERIENCE FACT SHEETS:

GLOSSARY OF TERMS

SECTION	METRIC	DEFINITIONS	HOW TO READ THE STATS
INTEREST IN EXPERIENCE BY SEGMENT	**% interested among segments**	• Out of Region Traveller: Total travellers across 19 markets (excludes Australia). Travelled internationally outside of their home region in the past 3 years, or intend to in the next 2 years. • High Yield Traveller: Tourism Australia's primary target audience, a high yield travelling audience defined by total or intended trip spend. Spend thresholds vary by market, defined by Tourism Australia's 2020 segmentation research. • Luxury Traveller: Actual or intended trip spend above AUD $1,000 per person per night. • Long-Stay Traveller: Actual or intended trip length over 30 days. • Working Holiday Maker: Under 36 years who are considering or planning to take a working holiday.	x% of <segment> are interested in <experience>.
TRAVEL BEHAVIOUR PROFILE	**Travel motivations**	Travel typologies summarising different global traveller motivations, based on their main needs when travelling: • Reconnection: Reconnect, spend quality time with others, Relax & escape pressures of everyday life, Have fun & enjoy myself. • Into nature: Get in touch with nature, Relax & escape pressures of everyday life, To feel secure & comfortable. • Exploration: Explore new destinations, Learn & experience new things about the world, Immerse in a different culture/way of life. • Adventure: Have fun and enjoy myself, A sense of adventure, Meet new people & make friends. • Transformation: Focus on mental and/or physical wellbeing, Transformative experiences, self-discovery, growth, Indulge & pamper myself. • Passions, hobbies: Engage in a activity, hobby or passion, Indulge & pamper myself, Discover off-the-beaten-track places. • Restoration: To feel secure & comfortable, Indulge & pamper myself, Have fun & enjoy myself.	x% of those interested in <experience> travel for <motivation>, compared to y% of total global (excl. Aus) out-of-region travellers.
	Consideration of Australia	Considering travelling to Australia for a future vacation in the next 4 years.	x% of those interested in <experience> are considering visiting Australia in the next 4 years.
	Actively planning to visit Australia	Actively planning to visit Australia for a future vacation in the next 2 years.	x% of those interested in <experience> are intending to visit Australia in the next 2 years.
INTEREST IN EXPERIENCE ACROSS THE GLOBE	**Market**	Travellers' origin market. Note: emerging international markets outside of Tourism Australia's remit are shown in grey.	Out-of-region travellers from <market>...
	Interest %	The percentage of out-of region travellers from a particular source market who are interested in the experience.	x% of <market> are interested in <experience>.
	Rank	This experience's interest ranking (out of the 89 measured) within each market. A ranking of 1 represents the most appealing experience within the market, while a ranking of 89 represents the experience with the lowest interest level within the market.	<experience> ranks xth out of 89 in interest for travellers from <market>.
	Sizing	Estimated number of out-of-region travellers (in thousands) aged 18-64 within the market who are interested in the experience. Note: sizing estimates have been calculated based on 2019 (pre-COVID) out-of-region travel volumes.	X thousand out-of-region travellers per year from <market> are interested in <experience>.
SUB-EXPERIENCES	**% interested in each sub-experience**	The percentage of those interested in the main experience who are interested in each sub-experience. Note: multiple responses possible. Interest in sub-experiences among total out-of-region travellers is shown in sub-experience fact sheet. Only 11 of the main experiences include sub-experiences	x% of those interested in <main experience> are interested in <sub-experience>.
DEMOGRAPHIC PROFILE	**Lifestage**	A combination of age and family type. Younger Singles/Couples = aged under 45 with no dependent children; Older Singles/Couples = aged 45 years or older with no dependent children; Young Families = have dependent children aged up to 0-11 years old; Older families = have dependent children aged 12-18 years.	x% of those interested in <experience> are <lifestage>, compared to y% of total global (excl. Aus) out-of-region travellers.
	Age	Age range and average age. Note: target audience for this research was aged 18-64.	x% of those interested in <experience> are <age range> and their average age is z.
	Gender	Male or female. Note: survey included 'other' option, but all respondents identified as male or female.	x% of those interested in <experience> are <gender>.
	Income	Pre-tax household income, categorised into low, medium, high or very high, relative to total out-of-region travellers in each market.	x% of those interested in <experience> have <income level> household income.
AFFINITY EXPER-EINCES	**Top 10 associated experiences**	The related experiences that travellers interested in a particular experience are also interested in. The top 10 experiences were selected based on greatest propensity (indexed to total global excl. Aus travellers) and then ranked based on size (percentage interested). These experiences can be used to identify opportunities for cross-selling, partnerships and itinerary packaging.	Of those interested in <experience>, x% are also interested in <associated experience>.
QUAL-ITATIVE INSIGHT	**Traveller testimonials and quotes**	Further insight from the qualitative research detailing reasons this experience does or does not appeal to travellers; destinations they associate strongly with this experience; and direct quotations from High Yield Travellers. Note: not all experiences will have qualitative insights available.	

EXPERIENCE FACT SHEETS:

HOW TO READ AND INTERPRET

This information contained in this fact sheet relates to the ***Cycling*** experience, which is classified in the *Exploration* sub-cluster of the *Adventure* sector.

Each fact sheet includes summary insights highlighted in the banner.

On average, 25% of Out of Region Travellers globally (excluding Australia) are interested in cycling experiences when they travel. Significantly higher interest among Luxury Travellers (29% interested) and Working Holiday Maker considerers (40% interested in cycling).

Of those interested in cycling, 19% are motivated to travel to get *Into Nature* and 16% for *Adventure*, both significantly higher than the global average for these motivations.

Some 44% of those interested in cycling are considering a holiday to Australia in the next 4 years, and 19% are actively planning to visit in the next 2 years – both significantly higher than the global average.

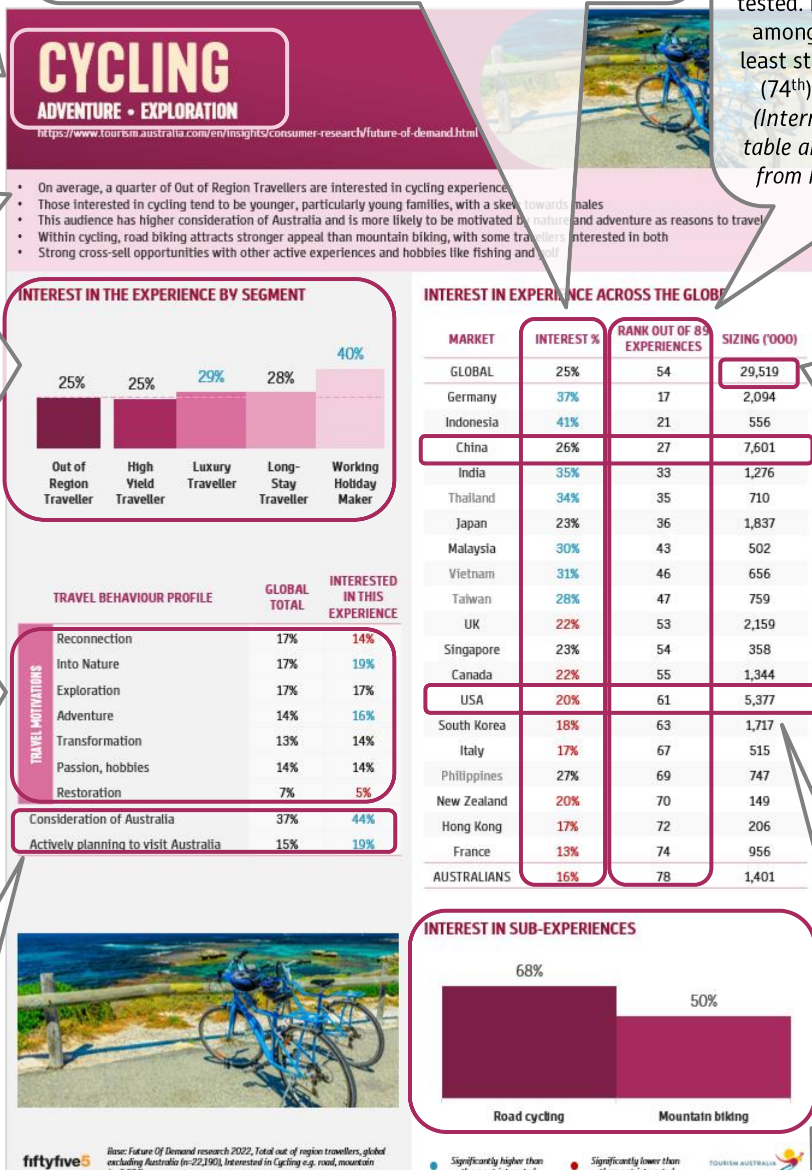
Germany, Indonesia, India and Malaysia (plus emerging markets Thailand and Vietnam) have significantly higher levels of interest in cycling than other markets – Indonesia highest with 41% interested. France is least interested (only 13% interested). *(Emerging markets outside of Tourism Australia's remit are depicted in grey text.)*

On average across international markets, cycling ranks 54th in interest out of the 89 experiences tested. It performs most strongly among Germans (ranked 17th), least strongly among the French (74th) and Australians (78th). *(International markets in this table are sorted on this column, from highest to lowest rank.)*

Across 19 global markets, almost 30 million out of region travellers per year are interested in cycling when they travel.

China has average interest in cycling (26% interested), but cycling ranks quite highly in this market (27th out of 89 experiences), and China is the market with the largest volume interested in cycling (7.6m travellers p.a.).

Despite significantly lower interest in cycling than other markets and a relatively low ranking compared to other experiences, the US represents the second largest volume opportunity for cycling (5.4m travellers p.a.).



CYCLING
ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, a quarter of Out of Region Travellers are interested in cycling experiences
- Those interested in cycling tend to be younger, particularly young families, with a skew towards males
- This audience has higher consideration of Australia and is more likely to be motivated by nature and adventure as reasons to travel
- Within cycling, road biking attracts stronger appeal than mountain biking, with some travellers interested in both
- Strong cross-sell opportunities with other active experiences and hobbies like fishing and golf

INTEREST IN THE EXPERIENCE BY SEGMENT

Out of Region Traveller	High Yield Traveller	Luxury Traveller	Long-Stay Traveller	Working Holiday Maker
25%	25%	29%	28%	40%

TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS		
Reconnection	17%	14%
Into Nature	17%	19%
Exploration	17%	17%
Adventure	14%	16%
Transformation	13%	14%
Passion, hobbies	14%	14%
Restoration	7%	5%
Consideration of Australia	37%	44%
Actively planning to visit Australia	15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	25%	54	29,519
Germany	37%	17	2,094
Indonesia	41%	21	556
China	26%	27	7,601
India	35%	33	1,276
Thailand	34%	35	710
Japan	23%	36	1,837
Malaysia	30%	43	502
Vietnam	31%	46	656
Taiwan	28%	47	759
UK	22%	53	2,159
Singapore	23%	54	358
Canada	22%	55	1,344
USA	20%	61	5,377
South Korea	18%	63	1,717
Italy	17%	67	515
Philippines	27%	69	747
New Zealand	20%	70	149
Hong Kong	17%	72	206
France	13%	74	956
AUSTRALIANS	16%	78	1,401

INTEREST IN SUB-EXPERIENCES

Road cycling	Mountain biking
68%	50%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Cycling e.g. road, mountain (n=5,634)

Significantly higher than those not interested · *Significantly lower than those not interested*

TOURISM AUSTRALIA

Of those interested in cycling, 68% are specifically interested in road cycling and 50% are interested in mountain biking.

These two sub-experiences sum to over 100%, meaning that some are interested in both road *and* mountain biking.

This shows interest *among those interested in the primary experience* (in this case, cycling). Refer to the sub-experience fact sheet to understand interest levels among *total* travellers.

(Note that not all experiences have sub-experiences.)

EXPERIENCE FACT SHEETS:

HOW TO READ AND INTERPRET

Of those interested in cycling, 36% are Young Family households with dependent children under 12. This life stage is significantly over-represented among those interested in cycling compared to the global traveller profile.

Those interested in cycling skew younger, with 62% aged under 40.

Those interested in cycling are more likely to be male (56%).

The income profile of those interested in cycling is similar to the global average.

Some of the appeals of cycling as a tourism experience relate to being passionate about cycling in general or considering it a good way to get around specific destinations. While some enjoy active holidays, other travellers are put off by the idea of strenuous activity or being physically active on holidays.

Travellers associate European destinations like France, Budapest and Hungary as ideal places to engage in cycling experiences.

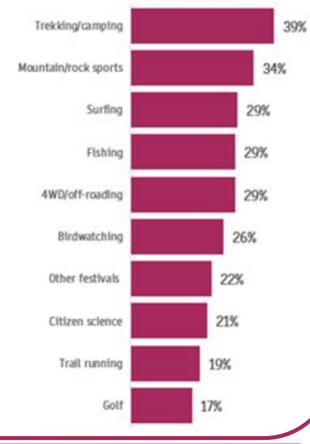
CYCLING

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	36%
	Older Families	16%	16%
AGE	18-29	30%	34%
	30-39	26%	28%
	40-49	22%	21%
	50-64	22%	18%
	Average age	38	37
GENDER	Male	50%	56%
	Female	50%	44%
INCOME	Low	25%	25%
	Middle	28%	27%
	High	24%	24%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



Those interested in cycling are also likely to be interested in other active adventure experiences, most prominently trekking/camping (39% interested) and mountain/ rock sports (34% interested). There are also cross-sell opportunities with more niche hobbies like fishing (29% interested) and golf (17% interested).

TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS
- Passionate about cycling
- Good way to get around a specific destination
- Enjoy holidays that are active

WHY SOME DO NOT
- Do not enjoy cycling or being physically active while on holiday or consider it too strenuous

HERO DESTINATIONS
- France • Budapest • Hungary

My fitness levels aren't up to more than a couple of hours on a bike and I wouldn't want to exercise every day, especially on a mission to get from one place to another.

HIGH YIELD TRAVELLER, NEW ZEALAND

I have tried bike tours and it was an exciting way of touring the city. I am an active person.

HIGH YIELD TRAVELLER, SINGAPORE

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5 *Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Cycling e.g. road, mountain (n=5,634)*

Significantly higher than those not interested *Significantly lower than those not interested*

TOURISM AUSTRALIA

SUB-EXPERIENCE FACT SHEETS:

HOW TO READ AND INTERPRET

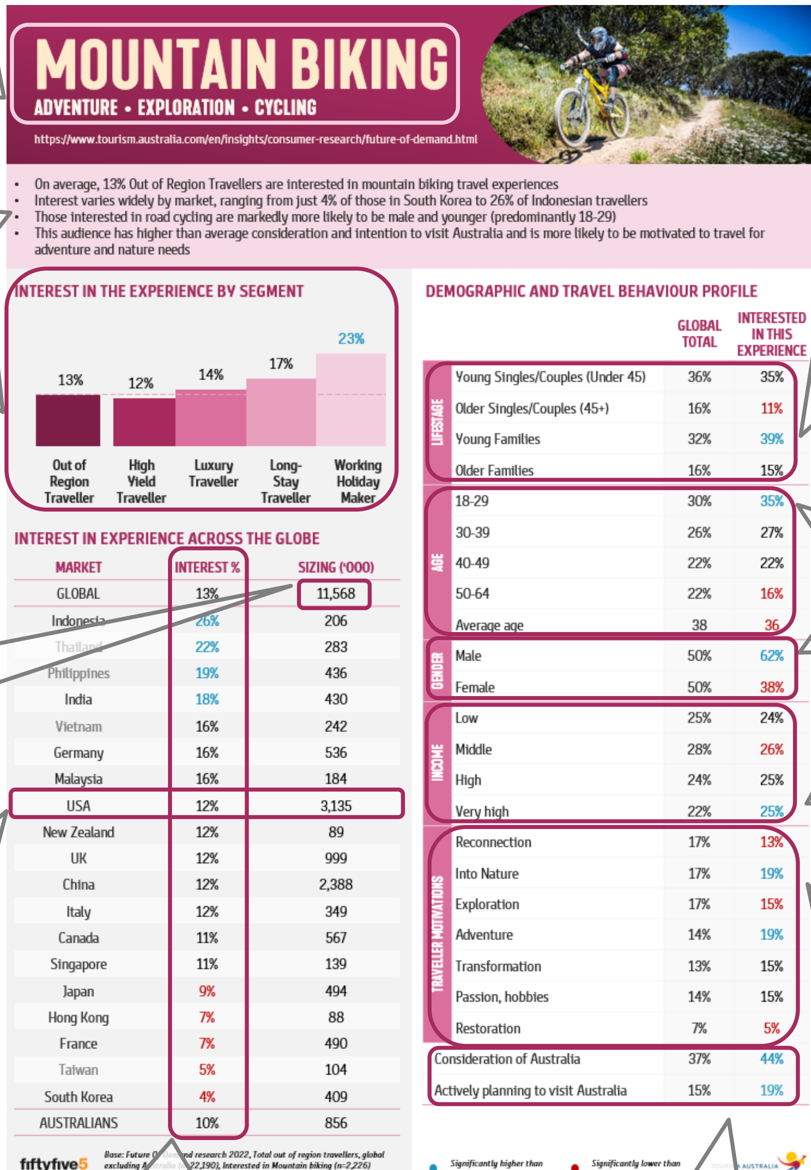
This information contained in this fact sheet relates to ***Mountain biking*** sub-experience, which is a form of the *Cycling* experience, and classified in the *Exploration* sub-cluster of the *Adventure* sector.

Each fact sheet includes summary insights highlighted in the banner.

On average, 13% of Out of Region Travellers globally (excluding Australia) are specifically interested in mountain biking experiences when they travel. Significantly higher interest among prospective Working Holiday Makers (23% interested in mountain biking).

Across 19 global markets, more than 11.5 million out of region travellers per year are interested in mountain biking when they travel.

The US has average interest in mountain biking (12% interested), but is the market with the largest potential volume each year (estimated 3.1m travellers interested).



MOUNTAIN BIKING

ADVENTURE • EXPLORATION • CYCLING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 13% Out of Region Travellers are interested in mountain biking travel experiences
- Interest varies widely by market, ranging from just 4% of those in South Korea to 26% of Indonesian travellers
- Those interested in road cycling are markedly more likely to be male and younger (predominantly 18-29)
- This audience has higher than average consideration and intention to visit Australia and is more likely to be motivated to travel for adventure and nature needs

INTEREST IN THE EXPERIENCE BY SEGMENT

Out of Region Traveller	High Yield Traveller	Luxury Traveller	Long-Stay Traveller	Working Holiday Maker
13%	12%	14%	17%	23%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	13%	11,568
Indonesia	26%	206
Thailand	22%	283
Philippines	19%	436
India	18%	430
Vietnam	16%	242
Germany	16%	536
Malaysia	16%	184
USA	12%	3,135
New Zealand	12%	89
UK	12%	999
China	12%	2,388
Italy	12%	349
Canada	11%	567
Singapore	11%	139
Japan	9%	494
Hong Kong	7%	88
France	7%	490
Taiwan	5%	104
South Korea	4%	409
AUSTRALIANS	10%	856

fiftyfive5

Base: Future of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Mountain biking (n=2,226)

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	39%
	Older Families	16%	15%
AGE	18-29	30%	35%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	16%
	Average age	38	36
GENDER	Male	50%	62%
	Female	50%	38%
INCOME	Low	25%	24%
	Middle	28%	26%
	High	24%	25%
	Very high	22%	25%
TRAVELLER MOTIVATIONS	Reconnection	17%	13%
	Into Nature	17%	19%
	Exploration	17%	15%
	Adventure	14%	19%
	Transformation	13%	15%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
	Consideration of Australia	37%	44%
	Actively planning to visit Australia	15%	19%

● Significantly higher than those not interested ● Significantly lower than those not interested

TOURISM AUSTRALIA

Among those interested in mountain biking, 39% are Young Family households with dependent children under 12. This life stage is significantly over-represented among those interested in mountain biking compared to the global traveller profile.

Those interested in cycling skew younger, with 35% aged 18-29.

Those interested in cycling are much more likely to be male (62%).

Those interested in mountain biking tend to earn higher incomes.

Of those interested in mountain biking, 19% each are motivated to travel to get *Into Nature* and *Adventure*, both significantly higher than the global average for these travel needs.

Indonesia and India (plus emerging markets Thailand and Philippines) have significantly higher levels of interest in cycling than other markets – Indonesia highest with 26% interested. South Korea is least interested (only 4% interested). *(Emerging markets outside of Tourism Australia's remit are depicted in grey text.)*

Some 44% of those interested in mountain biking are considering a holiday to Australia in the next 4 years, and 19% are actively planning to visit in the next 2 years – both significantly higher than the global average.

HERITAGE

HISTORY

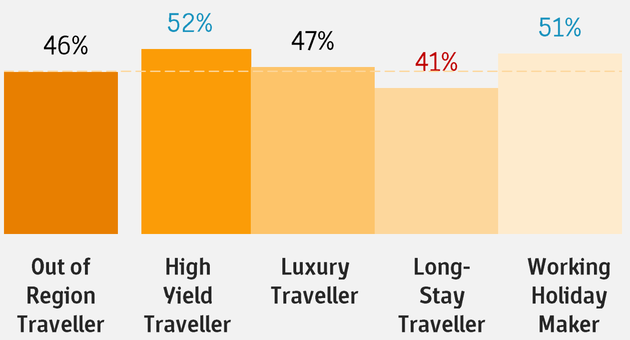
SITES OF HISTORICAL OR CULTURAL SIGNIFICANCE

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost half of Out of Region Travellers are interested in historical or cultural sites, with strongest interest from High Yield Travellers and Working Holiday Maker segments
- This experience ranks most highly in European markets, particularly Italy
- Those interested in historical or cultural sites are primarily motivated by exploration when they travel
- This audience skews older and towards higher incomes
- Strong cross-sell and packaging opportunities with other heritage experiences, spanning both history and Indigenous elements

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE

	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	19%
	Exploration	17%	23%
	Adventure	14%	11%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	42%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	46%	8	53,181
Italy	52%	3	1,600
Germany	47%	5	2,627
France	42%	7	3,097
UK	44%	7	4,220
Japan	46%	7	3,604
Philippines	57%	9	1,585
Thailand	51%	10	1,085
China	36%	10	10,450
Indonesia	52%	10	703
South Korea	49%	10	4,838
Taiwan	54%	10	1,465
Malaysia	45%	11	742
Singapore	41%	11	640
Canada	43%	12	2,638
USA	40%	13	10,583
Hong Kong	42%	14	523
New Zealand	42%	15	311
India	42%	15	1,550
Vietnam	43%	18	920
AUSTRALIANS	45%	9	3,906

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Sites of historical or cultural significance (n=9,977)

Significantly higher than those not interested (blue) · *Significantly lower than those not interested* (red)

TOURISM AUSTRALIA

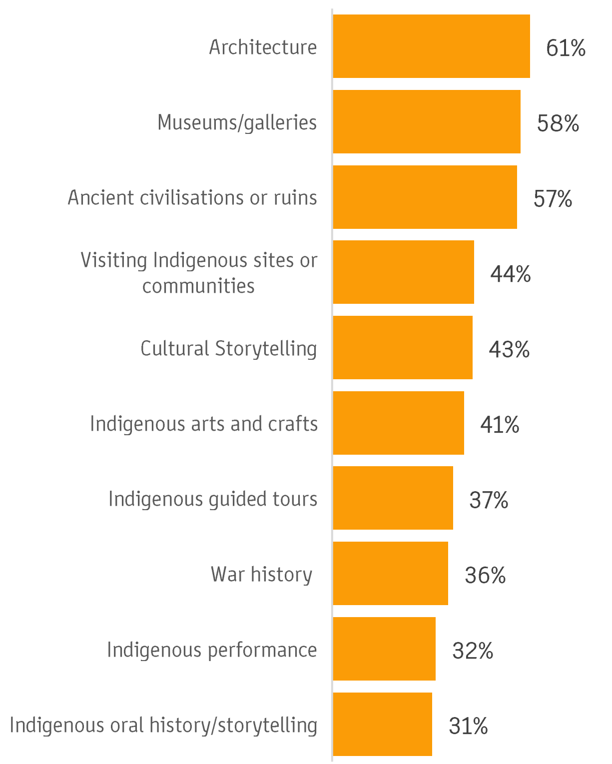
SITES OF HISTORICAL OR CULTURAL SIGNIFICANCE

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTYLE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	19%
	Young Families	32%	30%
	Older Families	16%	17%
AGE	18-29	30%	27%
	30-39	26%	25%
	40-49	22%	23%
	50-64	22%	25%
	Average age	38	39
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	22%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Authentic experience, unique to culture and place • Something every HYT needs to see once in a lifetime, crossing it off their bucket list • Ability to learn about a place or culture through the lens of unique scenery

WHY SOME DO NOT

• If physically demanding, some may hesitate or may be barrier to including travel partners

HERO DESTINATIONS

• Machu Pichu, the temples in Mexico, pyramids in Egypt, Angkor Wat, Moai statues

"I'm passionate about learning and discovering new things, so I'd usually look for something historical or curious to see, whether in a city or in nature

HIGH YIELD TRAVELLER, UNITED KINGDOM

I will consider a tour guide for a historical site because I want to learn about a culture and history as much as I can.

HIGH YIELD TRAVELLER, UNITED STATES

"

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Sites of historical or cultural significance (n=9,977)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

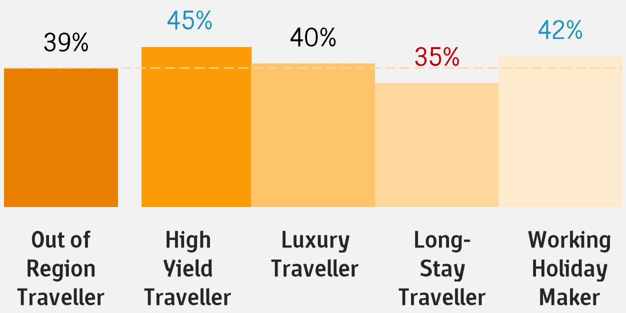
ANCIENT CIVILISATIONS OR RUINS

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, around 2 in 5 are interested in experiencing ancient civilisations or ruins when they travel, higher among High Yield Travellers and Working Holiday Maker segments
- This audience skews older and towards higher incomes
- Those interested in ancient civilisations or ruins are primarily motivated by exploration when they travel
- Strong cross-sell and packaging opportunities with other history-based experiences and exploring Indigenous culture

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	19%
	Exploration	17%	22%
	Adventure	14%	11%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	43%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	39%	15	46,597
Italy	50%	6	1,566
Hong Kong	44%	10	543
Taiwan	52%	11	1,416
Japan	39%	13	3,070
Canada	42%	13	2,612
South Korea	45%	14	4,368
France	36%	15	2,661
China	33%	16	9,571
Germany	36%	19	2,010
New Zealand	40%	19	296
UK	36%	20	3,517
USA	36%	22	9,520
Indonesia	40%	23	543
Singapore	33%	25	511
Vietnam	40%	25	847
Malaysia	36%	26	605
India	35%	27	1,300
Thailand	33%	37	694
Philippines	34%	47	945
AUSTRALIANS	38%	17	3,338

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Ancient civilisations or ruins (n=8,601)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

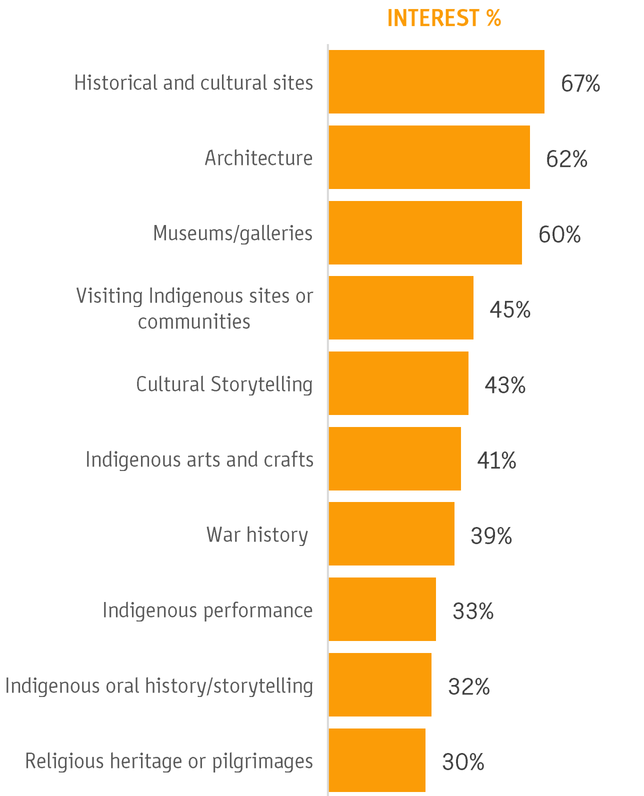
ANCIENT CIVILISATIONS OR RUINS

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	19%
	Young Families	32%	30%
	Older Families	16%	17%
AGE	18-29	30%	26%
	30-39	26%	25%
	40-49	22%	24%
	50-64	22%	25%
	Average age	38	39
GENDER	Male	50%	51%
	Female	50%	49%
INCOME	Low	25%	22%
	Middle	28%	29%
	High	24%	25%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Taps into interest in history (light education for those who enjoy learning about the past)

WHY SOME DO NOT

• Too much walking and/or learning, prefer more laid back methods of relaxing

HERO DESTINATIONS

• Egypt – pyramids
• Italy - Pompeii

I like to visit temples especially the ones that are in caves or up on mountain sides, or beautiful ruins. But I'm not there for the religious experience, I'm just there to see the sights.

HIGH YIELD TRAVELLER, NEW ZEALAND

Looking at the ruins in South America, seeing Machu Pichu... Seeing how people lived before all the technology we have. Seeing the advanced technology they figured out during their time.

HIGH YIELD TRAVELLER, UNITED STATES

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Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Ancient civilisations or ruins (n=8,601)

● *Significantly higher than those not interested*
● *Significantly lower than those not interested*

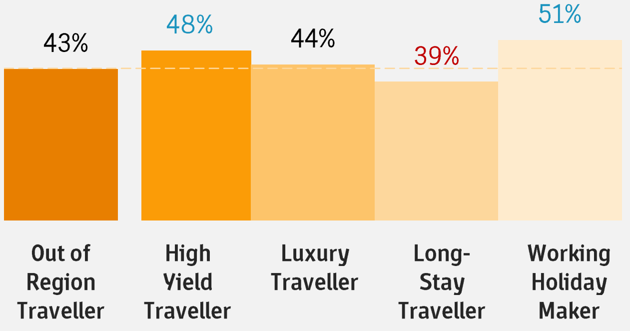
ARCHITECTURE, NOTABLE BUILDINGS OR MONUMENTS

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Just over 2 in 5 are interested in experiencing architecture, notable buildings or monuments, with higher interest among High Yield Travellers and Working Holiday Maker segments, and several Asian markets
- Those interested in architecture-based experiences are more likely to be motivated by exploration when they travel
- This audience skews towards higher incomes
- Opportunities to cross-sell or package with key historical experiences such as historical/cultural sites, museums/galleries and ancient civilisations

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	18%
	Exploration	17%	22%
	Adventure	14%	11%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	43%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	42%	9	49,786
Malaysia	49%	6	819
South Korea	53%	8	5,220
France	39%	9	2,879
Indonesia	48%	11	652
Japan	42%	11	3,274
Vietnam	49%	11	1,040
China	36%	11	10,282
Taiwan	50%	12	1,359
Philippines	54%	12	1,499
Germany	38%	13	2,139
Italy	45%	14	1,413
UK	38%	17	3,624
Canada	39%	17	2,429
Hong Kong	41%	17	506
Thailand	41%	20	872
India	39%	20	1,419
Singapore	35%	20	546
USA	36%	21	9,530
New Zealand	38%	22	285
AUSTRALIANS	37%	21	3,249

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Architecture, notable buildings or monuments (n=9,273)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

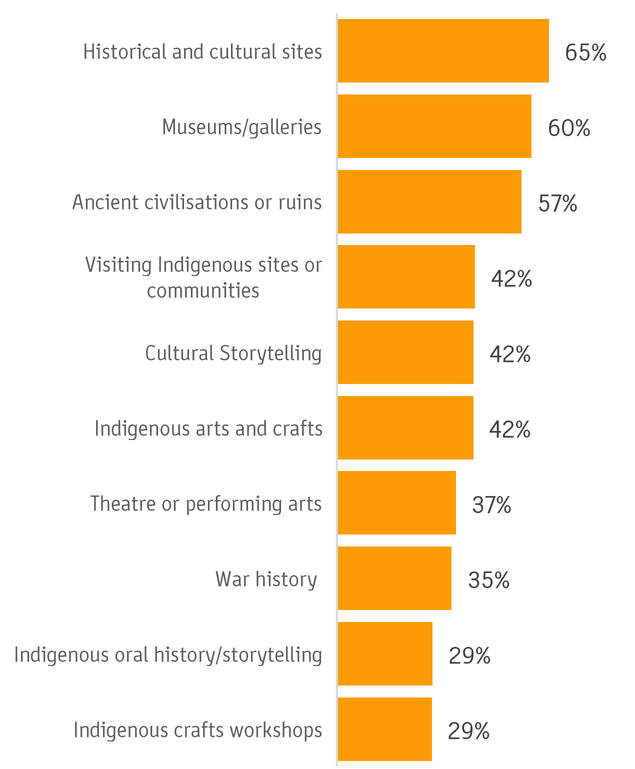
ARCHITECTURE, NOTABLE BUILDINGS OR MONUMENTS

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	18%
	Young Families	32%	30%
	Older Families	16%	16%
AGE	18-29	30%	29%
	30-39	26%	25%
	40-49	22%	23%
	50-64	22%	23%
	Average age	38	39
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	23%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Passionate about architecture
- Destination is known for its architecture i.e., it's a must-do activity

WHY SOME DO NOT

- Not interested in architecture
- Find it too slow paced or boring

HERO DESTINATIONS

Destinations with renowned architecture and famous buildings e.g. Egypt, Tel Aviv

*Great culture, architecture... I like to visit places I've read or seen a lot about. It's nice to visit places that you know in theory and make them your reality. I mostly choose famous places - that you hear so much about and just *have* to go to.*

HIGH YIELD TRAVELLER, NEW ZEALAND

Architecture isn't really appealing unless it is unique and has a lot of history such as Egypt.

HIGH YIELD TRAVELLER, UNITED STATES

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Architecture, notable buildings or monuments (n=9,273)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

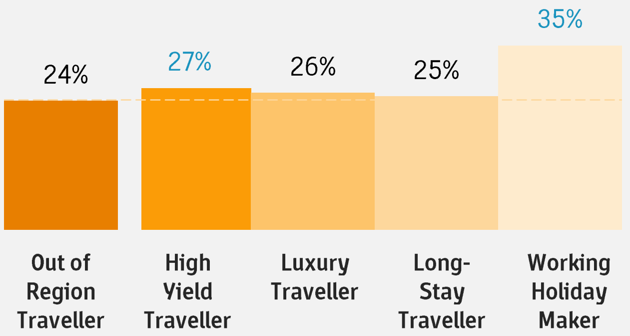
WAR HISTORY

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Around a quarter of Out of Region Travellers are interested in war history, with significantly greater interest from Working Holiday Makers
- Exploration is a primary travel motivator for those interested in war history
- This audience tends to be younger (predominantly 18-29), with a skew towards males and higher incomes
- Those interested in war history have very high consideration of Australia as a holiday destination
- The strongest cross-sell opportunities relate to Indigenous culture, religion, and ancestry

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	18%
	Exploration	17%	20%
	Adventure	14%	14%
	Transformation	13%	12%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	25%	56	27,351
UK	30%	29	2,888
Hong Kong	28%	38	343
New Zealand	31%	39	228
Canada	27%	40	1,673
USA	25%	43	6,614
Malaysia	29%	44	486
Singapore	25%	45	383
Germany	21%	49	1,155
Japan	17%	52	1,372
Philippines	30%	53	837
France	18%	54	1,371
Thailand	25%	55	531
Italy	20%	56	635
Indonesia	26%	60	350
Taiwan	22%	63	585
India	27%	65	992
South Korea	16%	65	1,566
Vietnam	27%	65	584
China	17%	66	4,758
AUSTRALIANS	30%	34	2,622

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in War history e.g. battlegrounds, memorials (n=5,383)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

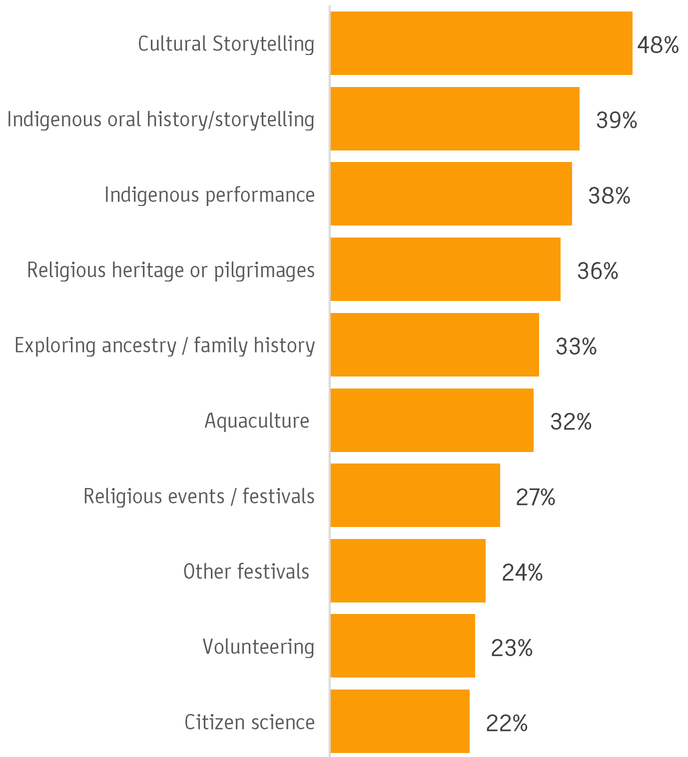
WAR HISTORY

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTYLE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	15%
	Young Families	32%	32%
	Older Families	16%	16%
AGE	18-29	30%	32%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	20%
	Average age	38	37
GENDER	Male	50%	54%
	Female	50%	46%
INCOME	Low	25%	23%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Interested in war history
- Unique way to learn about a destination
- Enjoy educational activities

WHY SOME DO NOT

- Not interested in history or war
- Find it slow pace or boring

HERO DESTINATIONS

- Any destination with prominent war history and historic landmarks e.g., Berlin Wall

Poland, I think this country has a lot of history around the war. I have heard it is quite eerie and upsetting/ disturbing at times but really grabs your attention. I've always wanted to go as there is loads I don't know and seeing it up close to get a feel for it would be an experience.

HIGH YIELD TRAVELLER, UNITED KINGDOM

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Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in War history e.g. battlegrounds, memorials (n=5,383)

Significantly higher than those not interested

Significantly lower than those not interested

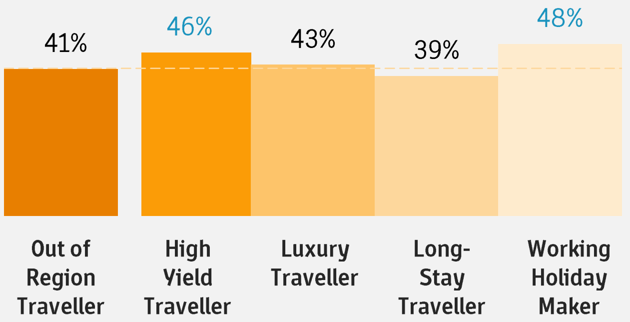
MUSEUMS/GALLERIES

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average around 2 in 5 Out of Region Travellers are interested in museums or galleries, representing approximately 48 million travellers per year across 19 international markets. The US accounts for the largest volume by market, with more than 11 million travellers interested
- Exploration is the leading travel motivator for those interested in museums or galleries
- Strong cross-sell opportunities with experiences around history, Indigenous or the arts

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	17%
	Exploration	17%	22%
	Adventure	14%	12%
	Transformation	13%	11%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	41%	10	48,044
Italy	51%	5	1,578
USA	43%	7	11,296
Philippines	59%	7	1,639
Japan	45%	8	3,571
UK	43%	9	4,130
Canada	44%	10	2,749
India	44%	12	1,622
South Korea	45%	13	4,417
Hong Kong	42%	13	528
Malaysia	43%	13	708
New Zealand	45%	13	335
France	36%	14	2,666
Indonesia	44%	17	601
Germany	37%	18	2,081
Singapore	35%	22	541
Taiwan	42%	24	1,148
Thailand	34%	31	726
China	25%	37	7,095
Vietnam	29%	54	610
AUSTRALIANS	43%	13	3,760

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Museums/galleries (n=9,162)

Significantly higher than those not interested

Significantly lower than those not interested

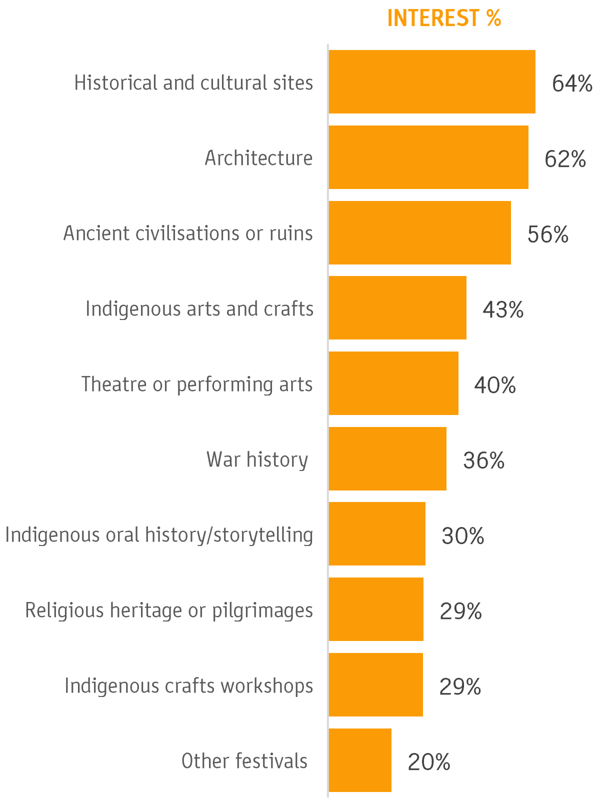
MUSEUMS/GALLERIES

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	18%
	Young Families	32%	30%
	Older Families	16%	16%
AGE	18-29	30%	30%
	30-39	26%	24%
	40-49	22%	22%
	50-64	22%	23%
	Average age	38	39
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	24%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Learning about a destination's past and culture. • Gaining access to famous/ world class artists' work, especially when unique to a destination. • Genuine love of art: serious art fans travel for specific shows, exhibitions and visits.

WHY SOME DO NOT

• Not active enough for some- potentially boring, prefer to learn about the destination's culture in a more interactive/ adventurous way

• For others depends on exhibition/ artists available and whether it aligns with personal taste

HERO DESTINATIONS

• Paris for Louvre • London for MOMA • Germany • Belgium

"If you want to dive deeper into the culture, then you have to go to exhibitions and muses. Here you get an important impression about the local culture

HIGH YIELD TRAVELLER, GERMANY

I think it's a really cool way of learning about different times/cultures/parts of the world

HIGH YIELD TRAVELLER, UNITED KINGDOM"

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Museums/galleries (n=9,162)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

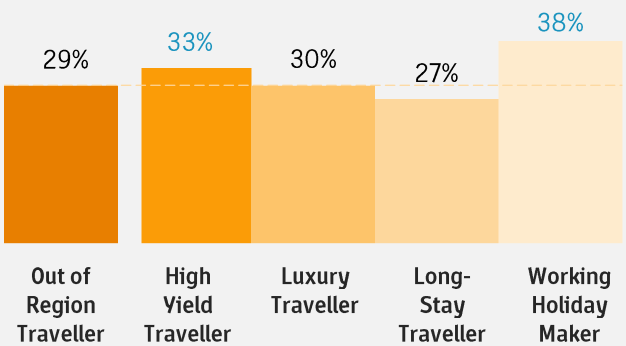
LEARN THE STORIES AND CULTURE BEHIND THE COMMUNITY

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average across 19 markets, 29% are interested in experiences to learn the stories and culture behind the community
- Interest is higher among High Yield Travellers, Working Holiday Makers, and Continental European and some South East Asian markets
- This audience is strongly motivated to seek exploration when they travel
- A range of Indigenous experiences feature as strong cross-sell opportunities across multiple sectors

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	17%
	Exploration	17%	23%
	Adventure	14%	13%
	Transformation	13%	13%
	Passion, hobbies	14%	13%
	Restoration	7%	5%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	29%	38	33,229
France	33%	18	2,444
Italy	36%	22	1,117
Thailand	39%	23	830
Malaysia	38%	23	634
Germany	33%	25	1,854
Canada	31%	27	1,927
USA	29%	30	7,790
New Zealand	31%	38	231
Philippines	37%	40	1,025
UK	26%	42	2,548
Hong Kong	26%	42	323
Indonesia	31%	45	421
Taiwan	29%	46	779
India	31%	48	1,153
China	21%	51	5,941
Singapore	24%	51	365
Japan	18%	51	1,392
Vietnam	28%	57	605
South Korea	19%	59	1,849
AUSTRALIANS	30%	36	2,603

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Learn the stories and culture behind the community (n=6,422)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

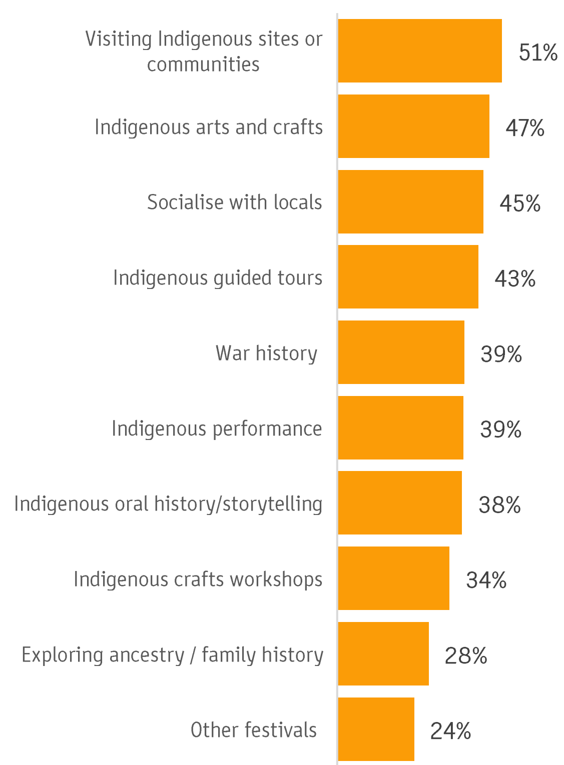
LEARN THE STORIES AND CULTURE BEHIND THE COMMUNITY

HERITAGE • HISTORY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	31%
	Older Families	16%	16%
AGE	18-29	30%	30%
	30-39	26%	25%
	40-49	22%	23%
	50-64	22%	23%
	Average age	38	38
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	23%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	26%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



> *Love to learn about the culture and the people. I also love to learn about the history of the place and how it's changed.*
>
> *HIGH YIELD TRAVELLER, NEW ZEALAND*

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Learn the stories and culture behind the community (n=6,422)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

HERITAGE

INDIGENOUS

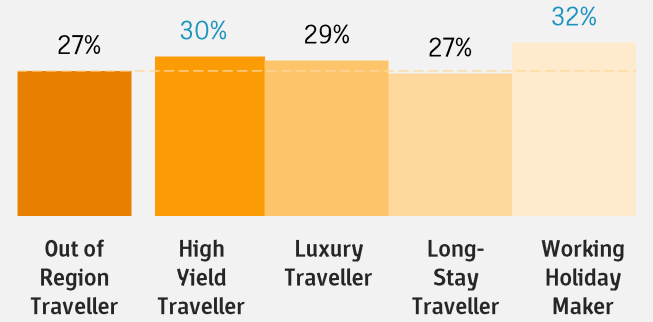
INDIGENOUS GUIDED TOURS

HERITAGE • INDIGENOUS / LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Just over a quarter of Out of Region Travellers are interested in Indigenous guided tours
- This audience has higher-than average incomes, with stronger interest among High Yield Travellers
- Those interested in this experience skew slightly older and towards family households
- This audience has higher consideration and intention for Australia and is more likely to travel for exploration and nature motivations
- Strong cross-sell opportunities with other heritage experiences, performing arts and immersive experiences

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	19%
	Exploration	17%	21%
	Adventure	14%	14%
	Transformation	13%	13%
	Passion, hobbies	14%	12%
	Restoration	7%	5%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	27%	46	28,815
Thailand	42%	19	884
Vietnam	41%	21	871
Singapore	29%	32	453
France	25%	34	1,836
Philippines	37%	39	1,037
UK	27%	40	2,587
Italy	26%	44	806
New Zealand	28%	45	211
Germany	23%	45	1,293
USA	25%	45	6,541
Hong Kong	25%	47	311
Indonesia	29%	49	399
Taiwan	26%	50	712
Canada	22%	51	1,384
South Korea	22%	51	2,115
India	31%	52	1,122
Malaysia	26%	57	431
Japan	16%	58	1,301
China	16%	71	4,522
AUSTRALIANS	24%	55	2,085

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Indigenous guided tours (n=5,849)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

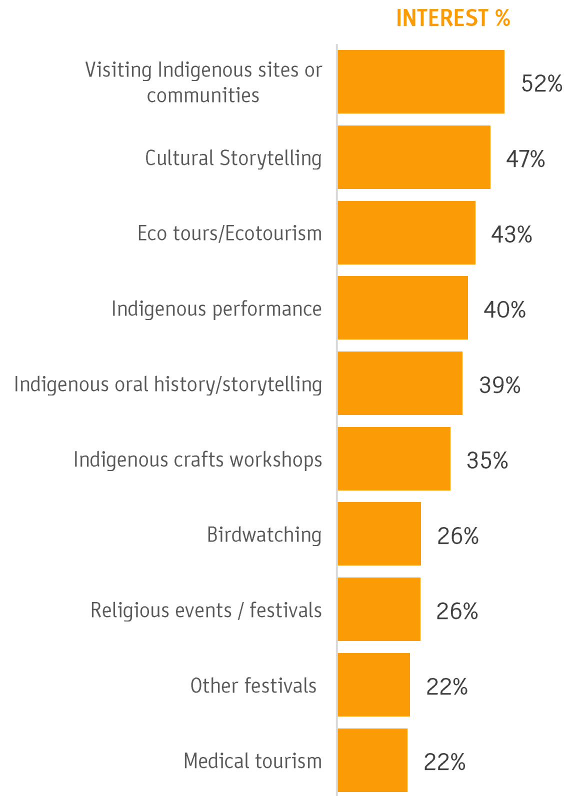
INDIGENOUS GUIDED TOURS

HERITAGE • INDIGENOUS / LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	32%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	33%
	Older Families	16%	18%
AGE	18-29	30%	26%
	30-39	26%	26%
	40-49	22%	23%
	50-64	22%	24%
	Average age	38	39
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	22%
	Middle	28%	26%
	High	24%	26%
	Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Niche experience to learn the history and culture of the region
- Authentic and safer to be with an Indigenous guide
- Get local knowledge, stories and information

WHY SOME DO NOT

- Logistical concern for getting to destination
- Sceptical of authenticity
- Concern of exploitation

HERO DESTINATIONS

- Destinations with strong Indigenous guided tours e.g., New Zealand and Australia

“

It sounds like a unique experience I wouldn’t be able to see elsewhere, and it would be interesting. I am interested in the day of the dead festival in Mexico. It definitely seems like something a little different and I think they have costumes and makeup on for the festivities. I imagine delicious food also

HIGH YIELD TRAVELLER, NEW ZEALAND

I think it's worth going because it's an internationally recognized heritage site, and I think it will be great for educating children

HIGH YIELD TRAVELLER, SOUTH KOREA

”

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Indigenous guided tours (n=5,849)

● *Significantly higher than those not interested* (blue)

● *Significantly lower than those not interested* (red)

TOURISM AUSTRALIA

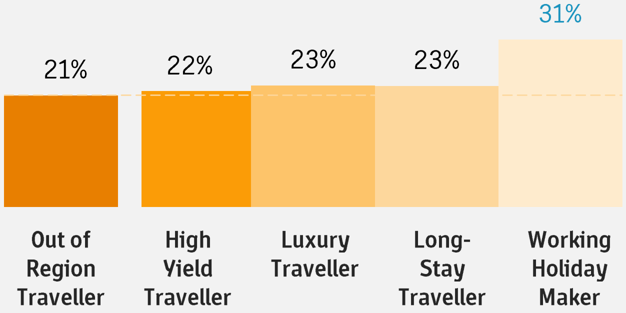
INDIGENOUS ORAL HISTORY/STORYTELLING

HERITAGE • INDIGENOUS / LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average around 1 in 5 are interested in Indigenous storytelling or oral history, with stronger interest among Working Holiday Makers
- South East Asian markets tend to have the highest appeal for this experience
- Those interested in Indigenous storytelling have above-average consideration and intention to visit Australia, and tend to be motivated by exploration, nature and transformation drivers when they travel
- Other Indigenous and history experiences represent the strongest cross-sell, partnership or packaging opportunities

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	18%
	Exploration	17%	20%
	Adventure	14%	14%
	Transformation	13%	15%
	Passion, hobbies	14%	13%
	Restoration	7%	5%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	21%	64	23,524
Thailand	34%	33	715
Malaysia	29%	45	481
China	19%	55	5,570
Indonesia	27%	57	366
Japan	16%	60	1,285
Vietnam	28%	61	590
Philippines	29%	63	798
New Zealand	21%	63	158
Italy	18%	65	550
Germany	16%	65	921
Hong Kong	19%	65	241
France	14%	65	1,051
Canada	19%	65	1,163
USA	19%	65	4,949
UK	18%	66	1,752
South Korea	13%	70	1,314
Taiwan	19%	70	500
India	24%	74	882
Singapore	15%	79	238
AUSTRALIANS	19%	65	1,672

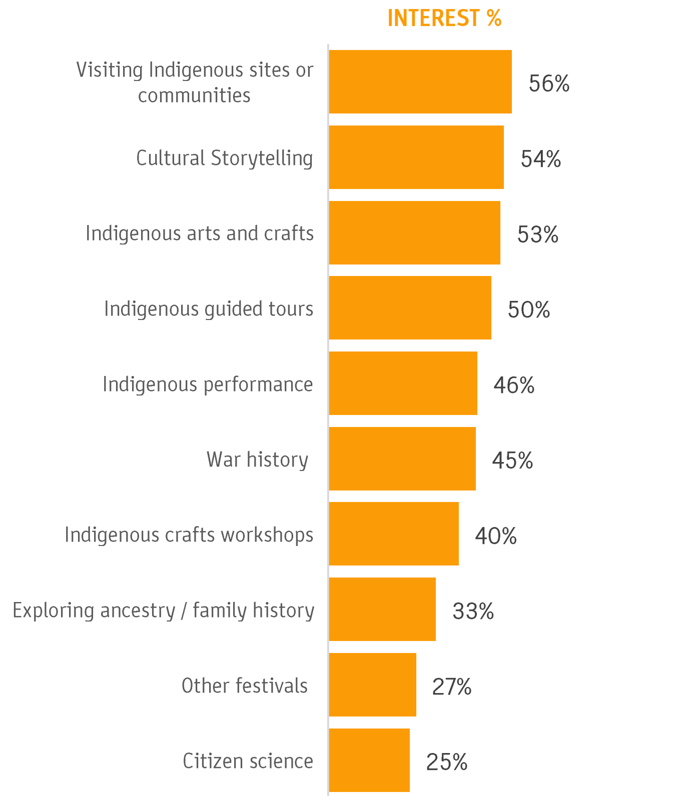
INDIGENOUS ORAL HISTORY/STORYTELLING

HERITAGE • INDIGENOUS / LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	15%
	Young Families	32%	34%
	Older Families	16%	17%
AGE	18-29	30%	31%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	24%
	Middle	28%	26%
	High	24%	25%
	Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Engaging way to learn history and traditions of the land
- Authentic way to experience history come to life

WHY SOME DO NOT

- Not as immersive and would rather engage in other activities while hearing stories e.g., food tour
- Sceptical of authenticity
- Concern of exploitation

HERO DESTINATIONS

- Destinations with authentic and known Indigenous tourism e.g., New Zealand and Australia

It would be nice to learn about history through someone who has lived it, and be able to ask them questions and explore further the things they say.

HIGH YIELD TRAVELLER, UNITED KINGDOM

I like storytelling and connecting with people more than performances. I feel like the chance of getting something authentic might be higher.

HIGH YIELD TRAVELLER, NEW ZEALAND

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Indigenous oral history/storytelling (n=4,560)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

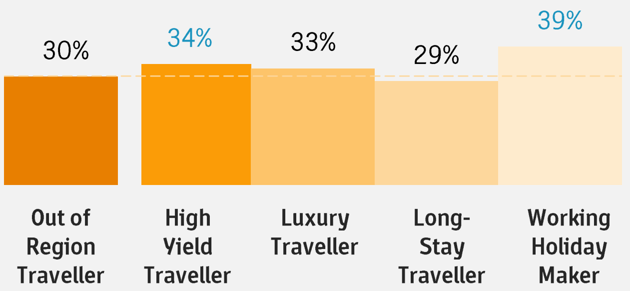
VISITING INDIGENOUS SITES OR COMMUNITIES

HERITAGE • INDIGENOUS / LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 3 in 10 Out of Region Travellers across 19 markets are interested in visiting Indigenous sites or communities
- Interest is stronger among High Yield Travellers, Working Holiday Makers, and Germany and South East Asian markets
- This audience tends to be most strongly motivated by exploration when they travel, followed by getting into nature
- Opportunity to cross-sell with cultural storytelling and other Indigenous experiences

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	19%
	Exploration	17%	22%
	Adventure	14%	13%
	Transformation	13%	13%
	Passion, hobbies	14%	13%
	Restoration	7%	5%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	30%	35	33,096
Germany	39%	11	2,224
Thailand	46%	14	961
Vietnam	44%	15	948
Philippines	42%	28	1,187
France	27%	29	1,997
Indonesia	37%	30	505
Italy	33%	31	1,014
India	35%	32	1,277
China	25%	34	7,214
Hong Kong	29%	35	360
UK	27%	38	2,601
Malaysia	32%	38	534
Singapore	26%	39	403
Taiwan	30%	40	818
New Zealand	30%	40	225
USA	27%	40	7,072
Canada	25%	46	1,544
South Korea	13%	74	1,285
Japan	12%	75	930
AUSTRALIANS	27%	44	2,398

Significantly higher than those not interested

Significantly lower than those not interested

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Visiting Indigenous sites or communities (n=6,615)

TOURISM AUSTRALIA

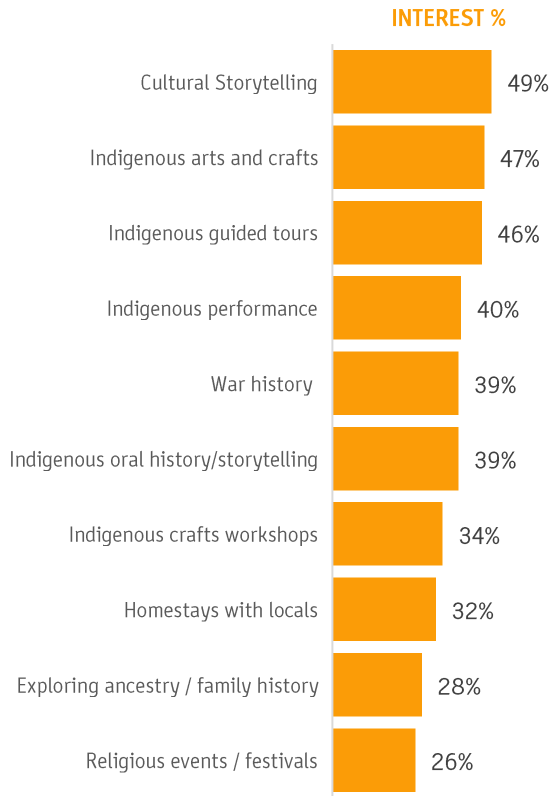
VISITING INDIGENOUS SITES OR COMMUNITIES

HERITAGE • INDIGENOUS / LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

DEMOGRAPHIC PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	33%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	33%
	Older Families	16%	17%
AGE	18-29	30%	28%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	23%
	Average age	38	39
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	22%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Niche experience to learn the history and culture of the region

WHY SOME DO NOT

- Logistical concern for getting to destination
- Sceptical of authenticity
- Concern of exploitation

HERO DESTINATIONS

- Destinations with strong Indigenous guided tours e.g., New Zealand and Australia

“

I think this is the best part about home stays where you can live with the local people and explore more about their culture at the same time, know their stories and share similar experiences and altogether learn and enjoy.

HIGH YIELD TRAVELLER, INDIA

”

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Visiting Indigenous sites or communities (n=6,615)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

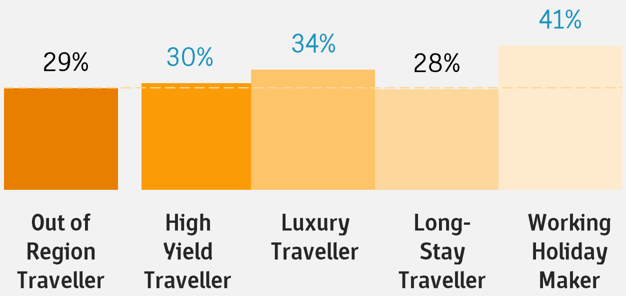
INDIGENOUS ART, CRAFT OR CULTURAL DISPLAYS

HERITAGE • INDIGENOUS / LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, around 3 in 10 Out of Region Travellers across 19 markets are interested in experiencing Indigenous art, craft or cultural displays – with strongest interest among Working Holiday Makers and the Indonesian market
- This audience is more likely to seek exploration as a travel motivation, and have above average interest in Australia as a holiday destination
- Opportunity to cross-sell with other Indigenous experiences, as well as cultural storytelling

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	18%
	Exploration	17%	21%
	Adventure	14%	13%
	Transformation	13%	13%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	28%	43	31,844
Indonesia	45%	14	611
Italy	35%	24	1,083
Thailand	38%	25	797
China	26%	26	7,604
Malaysia	36%	27	597
Vietnam	35%	32	756
Hong Kong	26%	41	328
Philippines	37%	41	1,021
Taiwan	30%	44	809
Japan	20%	45	1,570
South Korea	24%	47	2,348
USA	25%	48	6,497
New Zealand	28%	48	206
UK	23%	50	2,233
France	19%	51	1,436
Canada	22%	52	1,379
India	31%	53	1,122
Singapore	23%	53	360
Germany	19%	57	1,087
AUSTRALIANS	21%	61	1,843

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Indigenous art, craft or cultural displays (n=6,182)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

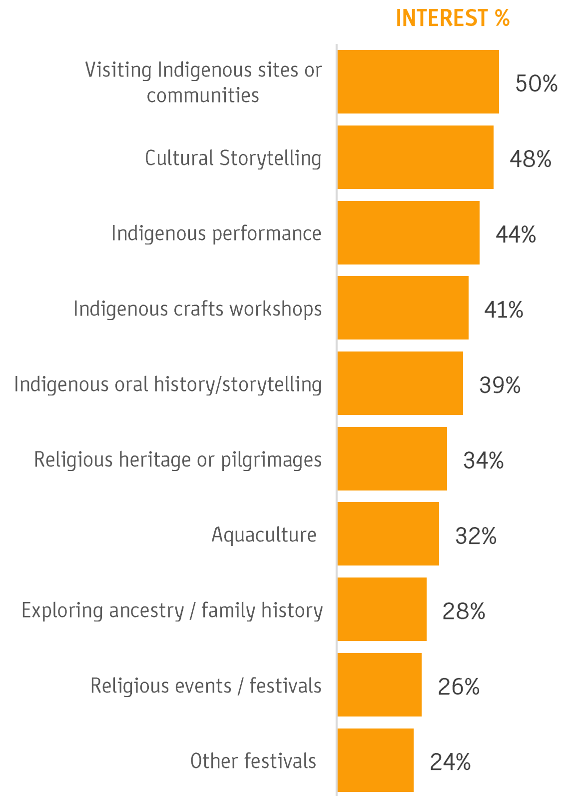
INDIGENOUS ART, CRAFT OR CULTURAL DISPLAYS

HERITAGE • INDIGENOUS / LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	33%
	Older Families	16%	16%
AGE	18-29	30%	31%
	30-39	26%	26%
	40-49	22%	21%
	50-64	22%	22%
	Average age	38	38
GENDER	Male	50%	44%
	Female	50%	56%
INCOME	Low	25%	24%
	Middle	28%	26%
	High	24%	27%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Indigenous art, craft or cultural displays (n=6,182)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

NATURE

NATURAL ENVIRONMENT

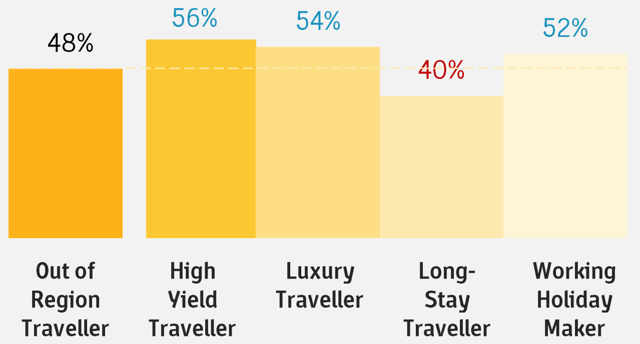
VIEWING NATURAL LANDMARKS AND WONDERS

NATURE • NATURAL ENVIRONMENT

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Viewing natural landmarks and wonders is of interest to around half the travel audience, representing an opportunity pool of 54.2 million travellers across 19 markets
- Exploration, getting into nature, and reconnection are key travel motivators for those interested in this experience
- Natural landmarks and wonders as an experience offers a strong yield opportunity, with strongest interest from High Yield and Luxury Travellers and an above-average income profile among those interested in this experience
- Sites of historical or cultural significance represent a strong cross-sell opportunity, as well as nature-based experiences

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	19%
	Exploration	17%	21%
	Adventure	14%	11%
	Transformation	13%	11%
	Passion, hobbies	14%	12%
	Restoration	7%	6%
Consideration of Australia		37%	43%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	48%	7	54,217
Italy	56%	2	1,749
France	43%	4	3,204
Singapore	51%	5	782
UK	46%	5	4,456
USA	44%	6	11,740
Hong Kong	47%	6	586
Taiwan	58%	7	1,577
Germany	43%	7	2,416
Philippines	58%	8	1,620
Malaysia	46%	8	761
New Zealand	48%	8	360
Vietnam	52%	8	1,110
Indonesia	52%	8	708
Canada	46%	9	2,848
Thailand	52%	9	1,103
India	47%	11	1,721
South Korea	47%	12	4,547
China	36%	12	10,204
Japan	35%	17	2,725
AUSTRALIANS	47%	6	4,116

● Significantly higher than those not interested
● Significantly lower than those not interested

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Viewing natural landmarks and wonders (n=10,374)

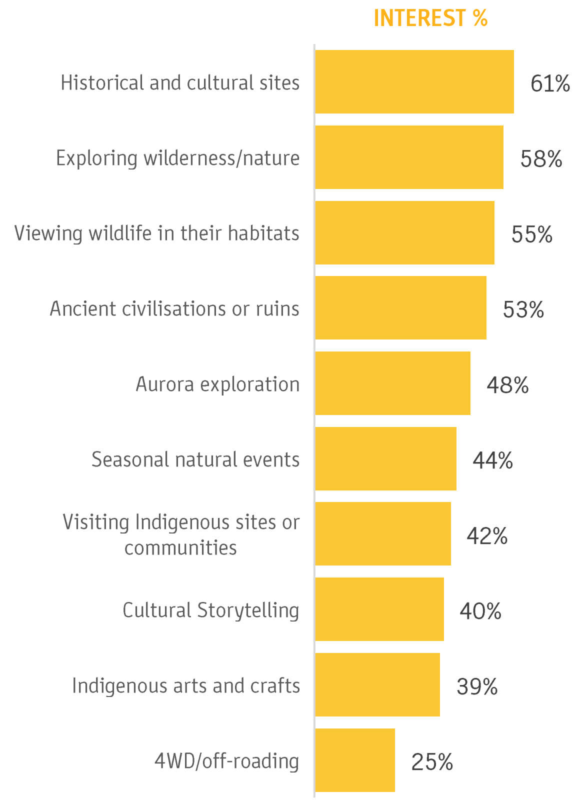
VIEWING NATURAL LANDMARKS AND WONDERS

NATURE • NATURAL ENVIRONMENT

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	19%
	Young Families	32%	30%
	Older Families	16%	17%
AGE	18-29	30%	27%
	30-39	26%	25%
	40-49	22%	23%
	50-64	22%	25%
	Average age	38	39
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	23%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



I would love to immerse myself in the midst of nature, go up a scenic mountain plain surrounded by rivers, lakes, waterfalls and lush greenery. Butterflies, dragonflies fluffing everywhere and spend a night at the cabin or lodge or little unspoilt hotel

HIGH YIELD TRAVELLER, SINGAPORE

It would be interesting to see the sights you usually just see on postcards.

HIGH YIELD TRAVELLER, GERMANY

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Viewing natural landmarks and wonders (n=10,374)

Significantly higher than those not interested (blue)

Significantly lower than those not interested (red)

TOURISM AUSTRALIA

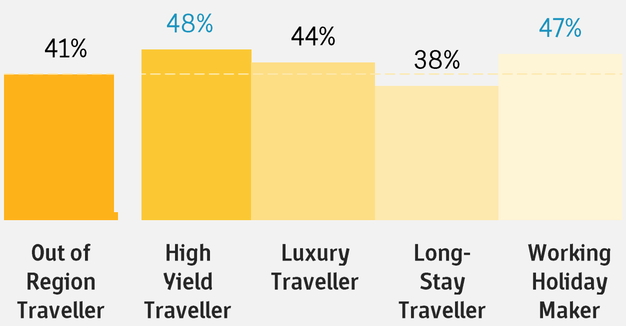
EXPLORING WILDERNESS/NATURE

NATURE • NATURAL ENVIRONMENT

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Wilderness and nature exploration offers a strong yield opportunity, with strongest interest among High Yield Travellers and a higher income profile among those interested in this experience
- Australia features strongly in the consideration set of those interested in exploring wilderness or nature areas
- Waterfalls are the most popular form of natural environment, followed by National/state parks, rivers/lakes and marine areas
- Cross-sell opportunities include other nature- and wildlife-based experiences, as well as exploring Indigenous heritage

INTEREST IN THE EXPERIENCE BY SEGMENT

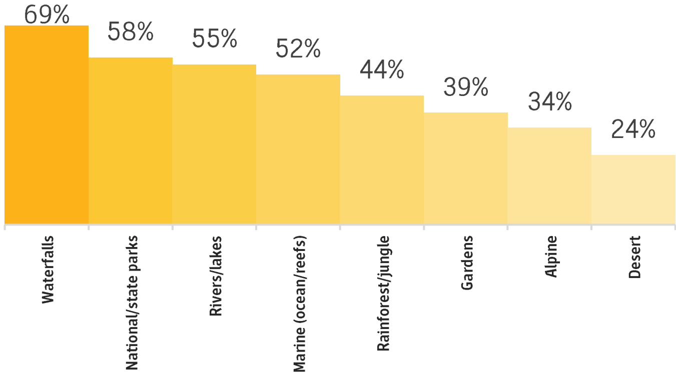


	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	20%
	Exploration	17%	21%
	Adventure	14%	11%
	Transformation	13%	11%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	41%	12	48,565
Germany	44%	6	2,504
France	40%	8	2,985
USA	40%	10	10,670
UK	42%	10	4,071
Canada	43%	11	2,657
Hong Kong	43%	11	541
Vietnam	46%	12	980
New Zealand	46%	12	342
Indonesia	45%	13	619
Malaysia	42%	14	706
China	35%	14	10,045
India	42%	14	1,554
Philippines	49%	15	1,360
Singapore	39%	15	602
Italy	40%	19	1,252
Japan	31%	22	2,458
Taiwan	43%	23	1,151
South Korea	35%	25	3,380
Thailand	33%	38	689
AUSTRALIANS	43%	12	3,798

INTEREST IN SUB-EXPERIENCES



fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Exploring wilderness/nature e.g. waterfalls, forests, landscapes (n=9,012)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

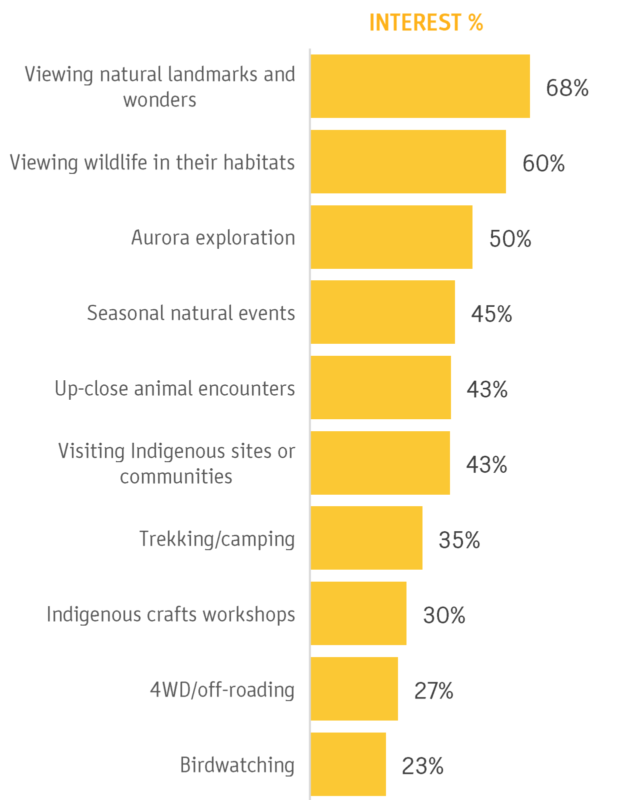
EXPLORING WILDERNESS/NATURE

NATURE • NATURAL ENVIRONMENT

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	18%
	Young Families	32%	31%
	Older Families	16%	17%
AGE	18-29	30%	29%
	30-39	26%	25%
	40-49	22%	23%
	50-64	22%	23%
	Average age	38	39
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Invigorating way to experience nature and be outdoors
• Freedom to wander and explore gardens, waterfalls and beautiful natural vistas
• Serene and good for the soul and mind

WHY SOME DO NOT

• Being outdoors can be uncomfortable, especially in hot weather, mosquitoes
• Challenging activity with young children or elderly travellers

HERO DESTINATIONS

• Destinations with vast natural landscapes, national parks and forests, exotic plants and animals
• Canada's Niagara Falls, US's Redwood Forest, Brazil's Amazon Rainforest, Japan's cherry blossom season

I love this sort of vista. The sounds and sights are so encompassing to see, feel and hear. Being able to walk through or near these areas would make this a perfect experience

HIGH YIELD TRAVELLER, UNITED STATES

I love exploring the wilderness and natural landscapes, hence anywhere that there's an opportunity to hike or explore mountains, I would be 100% up for it! Just love the challenge, scenic overview and sense of achievement reaching the target point.

HIGH YIELD TRAVELLER, SINGAPORE

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Exploring wilderness/nature e.g. waterfalls, forests, landscapes (n=9,012)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

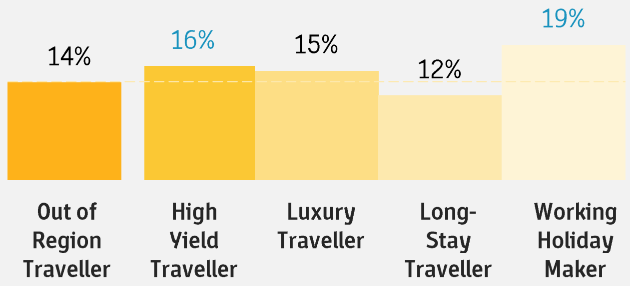
ALPINE

NATURE • NATURAL ENVIRONMENT • EXPLORING WILDERNESS AND NATURE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 14% of Out of Region Travellers are specifically interested in exploring alpine nature or wilderness areas
- Interest is stronger among High Yield Travellers and Working Holiday Makers
- Interest in alpine areas varies by market, from just 5% of South Koreans to 30% of the Indonesian market
- This audience tends to skew older, particularly older singles/couples with no dependent children
- Those interested in alpine areas are more likely to be motivated by getting into nature and exploration needs when they travel

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	14%	16,307
Indonesia	30%	406
Hong Kong	21%	260
Vietnam	19%	414
Malaysia	19%	308
Italy	16%	488
UK	15%	1,486
New Zealand	15%	114
Taiwan	14%	374
Singapore	13%	196
Thailand	12%	249
China	12%	3,377
France	11%	827
India	11%	407
Germany	11%	619
Philippines	11%	302
USA	10%	2,714
Canada	10%	609
Japan	9%	697
South Korea	5%	459
AUSTRALIANS	15%	1,359

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	32%
	Older Singles/Couples (45+)	16%	19%
	Young Families	32%	32%
	Older Families	16%	17%
AGE	18-29	30%	27%
	30-39	26%	25%
	40-49	22%	23%
	50-64	22%	25%
	Average age	38	39
GENDER	Male	50%	52%
	Female	50%	48%
INCOME	Low	25%	22%
	Middle	28%	28%
	High	24%	27%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	22%
	Exploration	17%	20%
	Adventure	14%	10%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	40%
Actively planning to visit Australia		15%	18%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Alpine (n=1,596)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

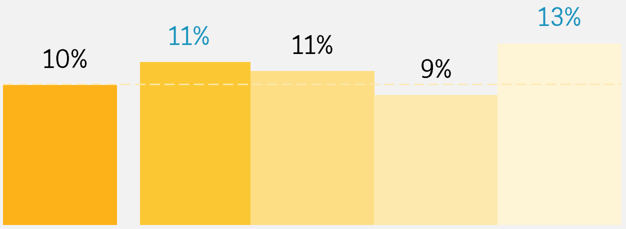
DESERT

NATURE • NATURAL ENVIRONMENT • EXPLORING WILDERNESS AND NATURE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Globally, 1 in 10 Out of Region Travellers are specifically interested in exploring desert areas, with Italy and France slightly more interested
- Interest in desert areas is stronger among High Yield Travellers and Working Holiday Makers
- Those interested in desert areas are more likely to be older singles/couples without dependent children, with higher incomes
- This audience is particularly strongly motivated by exploration needs when they travel

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	10%	11,644
Italy	14%	448
France	12%	875
Philippines	12%	327
Malaysia	12%	192
Canada	12%	713
India	11%	418
Hong Kong	11%	138
UK	10%	1,015
Thailand	10%	216
New Zealand	10%	73
Germany	10%	551
China	9%	2,614
South Korea	9%	838
USA	8%	2,172
Vietnam	8%	172
Singapore	8%	119
Japan	7%	579
Indonesia	7%	92
Taiwan	7%	176
AUSTRALIANS	12%	1,072

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	19%
	Young Families	32%	31%
	Older Families	16%	16%
AGE	18-29	30%	27%
	30-39	26%	26%
	40-49	22%	24%
	50-64	22%	24%
	Average age	38	39
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	21%
	Middle	28%	29%
	High	24%	24%
	Very high	22%	26%
TRAVELLER MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	19%
	Exploration	17%	24%
	Adventure	14%	13%
	Transformation	13%	13%
	Passion, hobbies	14%	11%
	Restoration	7%	4%
Consideration of Australia		37%	39%
Actively planning to visit Australia		15%	13%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Desert (n=1,153)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

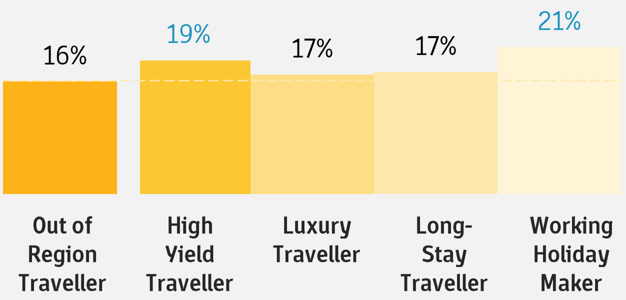
GARDENS

NATURE • NATURAL ENVIRONMENT • EXPLORING WILDERNESS AND NATURE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 16% of global travellers are interested in specifically exploring gardens when they travel, with higher interest among High Yield Travellers and Working Holiday Makers
- Interest levels are highest in Malaysia, while only 4% of the Japanese market are interested in visiting gardens
- This audience is more likely to be older (particular aged 50-64), especially older singles/couples without dependent children

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	16%	18,732
Malaysia	22%	362
New Zealand	21%	160
Philippines	21%	598
UK	20%	1,892
Vietnam	19%	413
India	19%	691
Canada	19%	1,160
USA	17%	4,504
Indonesia	17%	228
Italy	16%	503
Singapore	15%	235
Taiwan	15%	406
France	15%	1,092
Thailand	13%	284
Germany	13%	755
Hong Kong	13%	164
China	12%	3,527
South Korea	11%	1,055
Japan	4%	311
AUSTRALIANS	19%	1,689

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	31%
	Older Singles/Couples (45+)	16%	22%
	Young Families	32%	30%
	Older Families	16%	17%
AGE	18-29	30%	25%
	30-39	26%	24%
	40-49	22%	23%
	50-64	22%	28%
	Average age	38	40
GENDER	Male	50%	42%
	Female	50%	58%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	22%
TRAVELLER MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	21%
	Exploration	17%	19%
	Adventure	14%	11%
	Transformation	13%	11%
	Passion, hobbies	14%	13%
	Restoration	7%	7%
Consideration of Australia		37%	40%
Actively planning to visit Australia		15%	17%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Gardens (n=1,858)

● Significantly higher than those not interested

● Significantly lower than those not interested

TOURISM AUSTRALIA

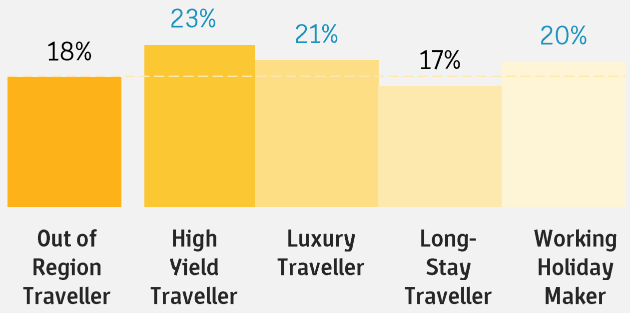
RAINFOREST/JUNGLE

NATURE • NATURAL ENVIRONMENT • EXPLORING WILDERNESS AND NATURE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost 1 in 5 global Out of Region Travellers are interested in exploring rainforest or jungle areas, with higher interest among higher-yielding audiences and Working Holiday Makers
- Interest is lowest in South Korea and highest in the Philippines, while the US presents the largest potential market size
- This audience tends to be slightly older, and most likely to be motivated by exploration and nature needs when travelling

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	18%	21,588
Philippines	33%	923
India	25%	924
New Zealand	25%	184
Malaysia	24%	402
Vietnam	22%	479
Germany	22%	1,244
USA	20%	5,405
Canada	20%	1,251
France	20%	1,453
UK	18%	1,759
China	17%	4,956
Italy	17%	521
Singapore	16%	249
Indonesia	16%	213
Hong Kong	16%	194
Thailand	13%	271
Taiwan	13%	345
Japan	8%	650
South Korea	7%	689
AUSTRALIANS	24%	2,114

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	32%
	Older Singles/Couples (45+)	16%	19%
	Young Families	32%	32%
	Older Families	16%	17%
AGE	18-29	30%	26%
	30-39	26%	25%
	40-49	22%	25%
	50-64	22%	24%
	Average age	38	40
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	25%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	22%
TRAVELLER MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	21%
	Exploration	17%	21%
	Adventure	14%	11%
	Transformation	13%	12%
	Passion, hobbies	14%	12%
	Restoration	7%	5%
Consideration of Australia		37%	39%
Actively planning to visit Australia		15%	15%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Rainforest/jungle (n=2,148)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

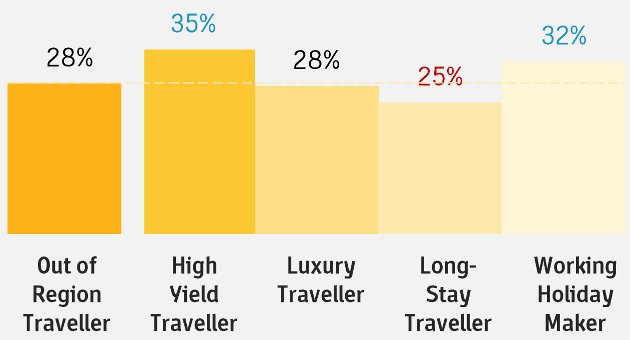
WATERFALLS

NATURE • NATURAL ENVIRONMENT • EXPLORING WILDERNESS AND NATURE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- More than a quarter of Out of Region Travellers are interested in exploring waterfalls when travelling nature
- High Yield Travellers and Working Holiday Makers have significantly higher interest
- Interest is highest among the Indian market, while most North Asian markets have lower levels of interest
- This audience skews older and towards females, with key travel motivations of getting into nature, exploration and reconnection

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	28%	33,378
India	35%	1,290
Philippines	34%	936
New Zealand	33%	245
Canada	32%	1,995
Germany	32%	1,777
Malaysia	31%	522
Vietnam	31%	669
Indonesia	31%	425
France	31%	2,276
USA	30%	7,922
UK	30%	2,874
Italy	29%	907
Singapore	29%	444
Hong Kong	27%	339
Taiwan	26%	707
Thailand	24%	499
South Korea	18%	1,799
China	18%	5,273
Japan	17%	1,333
AUSTRALIANS	32%	2,834

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	31%
	Older Singles/Couples (45+)	16%	22%
	Young Families	32%	29%
	Older Families	16%	18%
AGE	18-29	30%	24%
	30-39	26%	24%
	40-49	22%	25%
	50-64	22%	28%
	Average age	38	40
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	24%
	Middle	28%	29%
	High	24%	26%
	Very high	22%	21%
TRAVELLER MOTIVATIONS	Reconnection	17%	20%
	Into Nature	17%	21%
	Exploration	17%	21%
	Adventure	14%	10%
	Transformation	13%	10%
	Passion, hobbies	14%	12%
	Restoration	7%	6%
Consideration of Australia		37%	40%
Actively planning to visit Australia		15%	16%

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Waterfalls (n=3,311)

● *Significantly higher than those not interested* (blue)

● *Significantly lower than those not interested* (red)

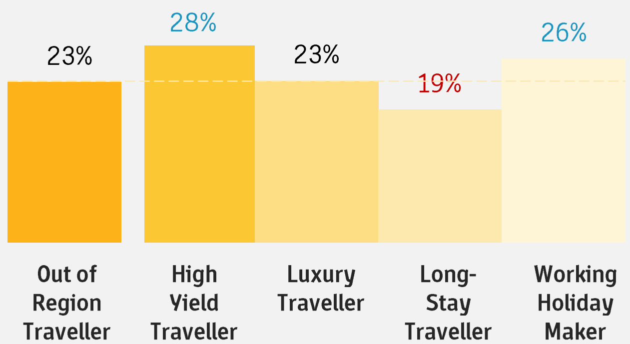
RIVERS/LAKES

NATURE • NATURAL ENVIRONMENT • EXPLORING WILDERNESS AND NATURE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost a quarter of all Out of Region travellers are specifically interested in exploring rivers or lakes, with higher interest among High Yield Travellers and Working Holiday Makers
- India, Hong Kong, the Philippines, UK and Germany – as well as Australians – have higher interest in this form of nature
- This audience tends to skew older, particularly older singles or couples without dependent children
- Getting into nature and exploration are the dominant travel motivations for this audience

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	23%	26,783
India	28%	1,015
Hong Kong	27%	335
Philippines	27%	745
UK	26%	2,543
Germany	26%	1,446
Malaysia	24%	405
Canada	24%	1,500
Indonesia	24%	329
France	24%	1,792
New Zealand	24%	178
Singapore	23%	357
Italy	23%	716
Taiwan	22%	586
USA	21%	5,474
Vietnam	20%	432
Thailand	18%	381
China	18%	5,104
South Korea	17%	1,690
Japan	15%	1,159
AUSTRALIANS	25%	2,216

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	32%
	Older Singles/Couples (45+)	16%	21%
	Young Families	32%	29%
	Older Families	16%	18%
AGE	18-29	30%	25%
	30-39	26%	24%
	40-49	22%	24%
	50-64	22%	27%
	Average age	38	40
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	24%
	Middle	28%	29%
	High	24%	25%
	Very high	22%	22%
TRAVELLER MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	22%
	Exploration	17%	21%
	Adventure	14%	10%
	Transformation	13%	11%
	Passion, hobbies	14%	12%
	Restoration	7%	6%
Consideration of Australia		37%	40%
Actively planning to visit Australia		15%	16%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Rivers/lakes (n=2,683)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

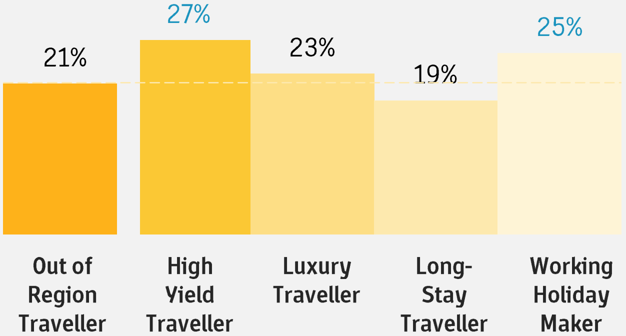
MARINE

NATURE • NATURAL ENVIRONMENT • EXPLORING WILDERNESS AND NATURE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Just over 1 in 5 Out of Region travellers are interested in exploring marine areas (oceans, reefs), with greater interest from High Yield Travellers and Working Holiday Makers
- This audience tends to skew older, particularly older singles/couples without dependent children, and towards females
- Among those specifically interested in marine wilderness, the leading travel motivations are getting into nature, exploration and reconnection

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	21%	25,111
Vietnam	31%	663
Germany	25%	1,413
NZ	25%	184
Canada	24%	1,501
Philippines	24%	675
Hong Kong	24%	297
Italy	23%	710
India	22%	818
Taiwan	22%	601
Indonesia	21%	279
China	21%	5,887
Singapore	20%	303
USA	19%	5,149
UK	19%	1,814
Japan	19%	1,472
Thailand	19%	392
France	17%	1,257
Malaysia	16%	262
South Korea	14%	1,360
AUSTRALIANS	22%	1,904

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	33%
	Older Singles/Couples (45+)	16%	20%
	Young Families	32%	30%
	Older Families	16%	16%
AGE	18-29	30%	26%
	30-39	26%	24%
	40-49	22%	25%
	50-64	22%	25%
	Average age	38	40
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	22%
	Middle	28%	29%
	High	24%	25%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	21%
	Exploration	17%	21%
	Adventure	14%	10%
	Transformation	13%	10%
	Passion, hobbies	14%	12%
	Restoration	7%	7%
Consideration of Australia		37%	41%
Actively planning to visit Australia		15%	16%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Marine (ocean/reefs) (n=2,489)

Significantly higher than those not interested *Significantly lower than those not interested*

TOURISM AUSTRALIA

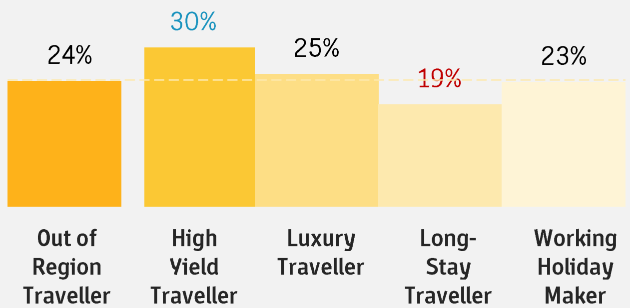
NATIONAL/STATE PARKS

NATURE • NATURAL ENVIRONMENT • EXPLORING WILDERNESS AND NATURE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, almost a quarter of Out of Region Travellers are interested in exploring National or state parks when they travel
- High Yield Travellers have stronger interest, as do travellers from Taiwan, Italy, Canada and New Zealand, as well as Australians
- Those interested in national/state parks skew older, particularly older singles/couples without children, and have above-average incomes
- Getting into nature, exploration and reconnection are the primary travel motivations among this audience

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	24%	28,000
Taiwan	32%	869
Italy	29%	887
Canada	27%	1,653
New Zealand	26%	197
Hong Kong	26%	328
Germany	25%	1,429
Singapore	25%	386
Indonesia	25%	338
India	25%	903
Vietnam	24%	518
USA	24%	6,390
Malaysia	24%	399
UK	24%	2,290
France	20%	1,469
Japan	19%	1,518
South Korea	19%	1,879
Thailand	19%	404
Philippines	18%	515
China	16%	4,535
AUSTRALIANS	27%	2,382

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	31%
	Older Singles/Couples (45+)	16%	24%
	Young Families	32%	28%
	Older Families	16%	17%
AGE	18-29	30%	22%
	30-39	26%	23%
	40-49	22%	25%
	50-64	22%	30%
	Average age	38	41
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	21%
	Exploration	17%	21%
	Adventure	14%	9%
	Transformation	13%	11%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	40%
Actively planning to visit Australia		15%	16%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in National/state parks (n=2,777)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

NATURE

PHENOMENA

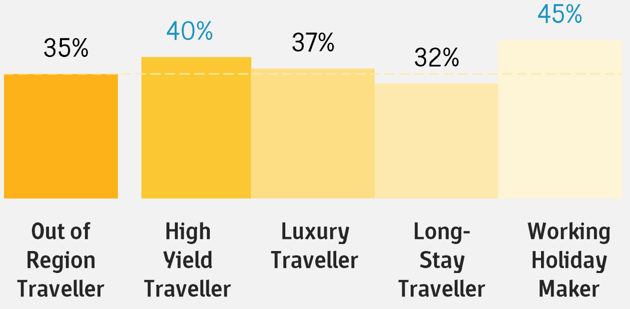
AURORA EXPLORATION (NORTHERN/ SOUTHERN LIGHTS)

NATURE • PHENOMENA

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- More than a third of Out of Region Travellers are interested in experiencing the aurora
- Interest in this experience varies greatly by market, from 21% of Indians (79th most appealing experience in their market) to 52% of Italians (4th most appealing experience in their market)
- This audience skews towards young singles or couples without children, and female travellers
- Strong cross-sell opportunities with other dark sky experiences, wildlife encounters, aerial tours and seasonal natural events

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	17%
	Exploration	17%	21%
	Adventure	14%	12%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	35%	23	40,296
Italy	52%	4	1,600
Japan	46%	6	3,626
Hong Kong	45%	7	554
Taiwan	46%	15	1,251
South Korea	42%	16	4,150
Singapore	36%	19	551
France	31%	20	2,329
New Zealand	39%	21	291
UK	34%	24	3,272
Canada	32%	26	1,966
Germany	32%	28	1,792
Philippines	42%	29	1,186
USA	29%	33	7,656
China	25%	33	7,293
Thailand	31%	43	651
Indonesia	32%	44	429
Malaysia	27%	52	442
Vietnam	23%	73	499
India	21%	79	759
AUSTRALIANS	35%	25	3,074

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Aurora exploration (Northern/ Southern Lights) (n=7,663)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

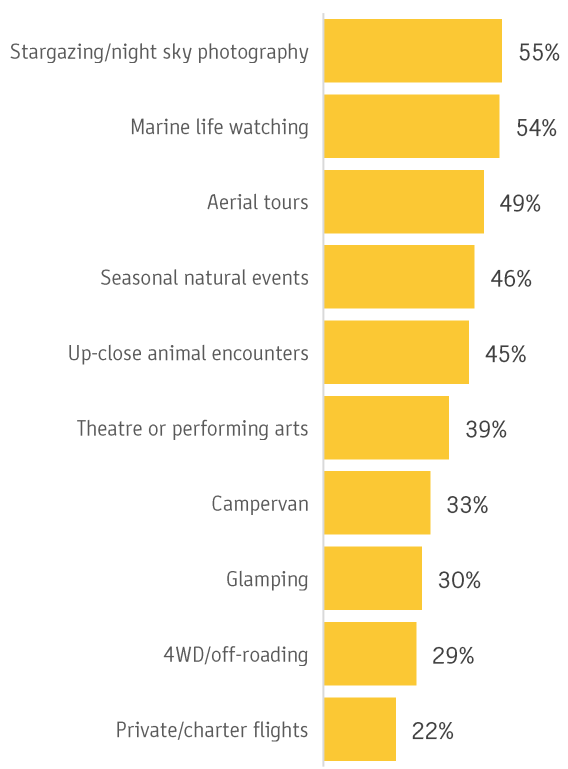
AURORA EXPLORATION (NORTHERN/ SOUTHERN LIGHTS)

NATURE • PHENOMENA

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	40%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	29%
	Older Families	16%	15%
AGE	18-29	30%	31%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	43%
	Female	50%	57%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Rare and unique opportunity to experience a natural wonder of the world
- Once-in-a-lifetime experience

WHY SOME DO NOT

- Cost conscious
- Logistically challenging to organise
- Risk of missing the event

HERO DESTINATIONS

- Destinations with known for northern lights e.g., Iceland, Canada, Norway, Finland, Alaska
- Australia for southern lights

It would be awesome. All those worthless trips to the planetarium would really come to life on this adventure. I suppose making a full day of it by a short adventure hike, a hike, etc leading up to the Aurora show would be cool.

HIGH YIELD TRAVELLER, UNITED STATES

Because it is rare scenery, I think the process of preparing for the trip will be fun, and I think it is a meaningful experience that makes memories that children will cherish for a long time

HIGH YIELD TRAVELLER, SOUTH KOREA

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Aurora exploration (Northern/ Southern Lights) (n=7,663)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

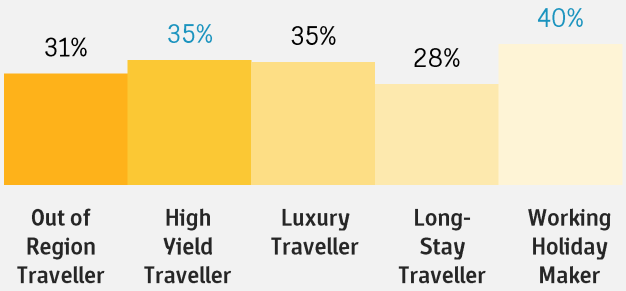
SEASONAL NATURAL EVENTS

NATURE • PHENOMENA

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall around 3 in 10 Out of Region Travellers are interested in seasonal natural events, with above-average interest in several Asian markets, as well as High Yield Travellers and Working Holiday Maker segments
- Relative to the global average, this experience tends to be less appealing to most Western markets
- Getting into nature (followed by exploration) is the primary travel motivation for those interested in seasonal natural events
- Diverse mix of cross-sell opportunities, including various Indigenous experiences, eco tours and agritourism

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	20%
	Exploration	17%	19%
	Adventure	14%	13%
	Transformation	13%	13%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	31%	32	34,429
Malaysia	40%	20	658
Hong Kong	37%	21	455
Japan	31%	21	2,463
Thailand	40%	21	852
India	38%	22	1,399
Singapore	33%	24	517
Taiwan	40%	28	1,082
Italy	33%	30	1,019
Indonesia	37%	31	500
Germany	30%	32	1,703
USA	28%	37	7,490
Canada	27%	39	1,674
South Korea	26%	40	2,499
Vietnam	33%	41	695
UK	26%	43	2,541
New Zealand	28%	43	213
France	22%	44	1,616
China	22%	46	6,391
Philippines	24%	79	663
AUSTRALIANS	28%	42	2,471

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Seasonal natural events (n=6,837)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

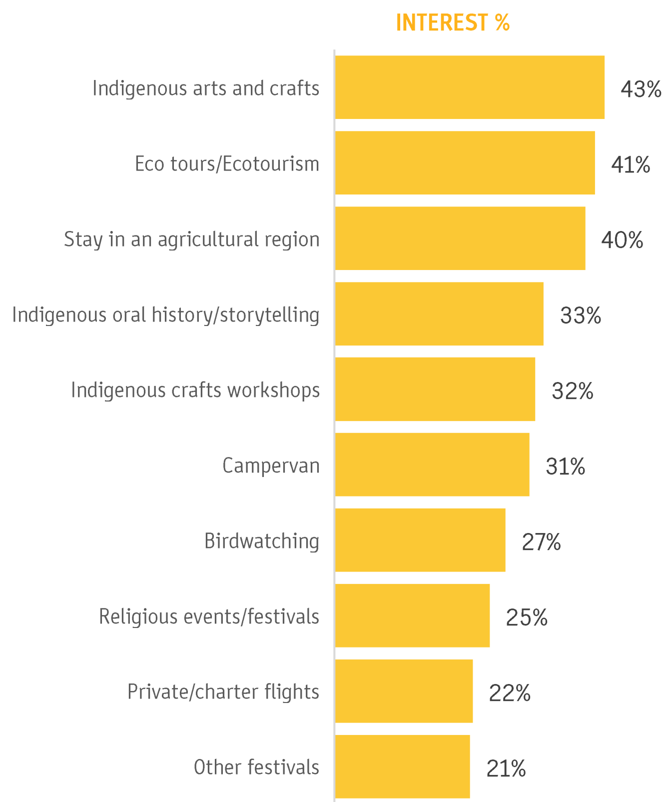
SEASONAL NATURAL EVENTS

NATURE • PHENOMENA

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	32%
	Older Families	16%	17%
AGE	18-29	30%	29%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	22%
	Average age	38	38
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	23%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Rare occurrences like these make the experience more special and memorable

WHY SOME DO NOT

• Timing is tricky- difficult to book/ may travel to destination and miss the event

HERO DESTINATIONS

• America – Yosemite Firefall (perfect alignment of the sun & waterfall)
• Iceland- Northern lights

"Being able to see rare events in person - especially if they are only once-a-year events must make them special, I like getting to see stuff that are not normal and are special. If it involved cute animals like penguins - the once-a-year (natural) events would be awesome to experience!"

HIGH YIELD TRAVELLER, NEW ZEALAND

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Seasonal natural events (n=6,837)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

NATURE

WILDLIFE

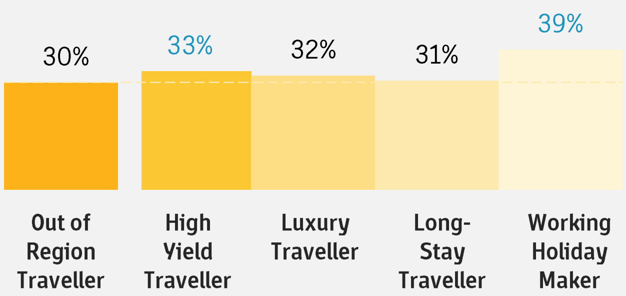
UP-CLOSE ANIMAL ENCOUNTERS

NATURE • WILDLIFE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average 3 in 10 global travellers are interested in up-close animal encounters, with strongest interest among Working Holiday Makers
- Those interested in up-close animal encounters have stronger than average consideration for Australia
- This audience tends to be younger (under 40), with a slight skew towards females
- Strong cross-sell opportunities with other animal experiences, including wildlife in their natural habitat and marine life encounters
- Key drawcards are tranquil experiences and exposure to unique or native animals – with Australia recognised as a hero destination

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	19%
	Exploration	17%	19%
	Adventure	14%	13%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	30%	36	35,044
France	33%	17	2,477
Japan	34%	19	2,691
Hong Kong	34%	26	426
Italy	34%	27	1,051
UK	31%	28	2,963
New Zealand	34%	29	257
Germany	31%	30	1,771
Vietnam	36%	31	761
South Korea	28%	35	2,696
Taiwan	32%	36	868
USA	28%	38	7,318
Canada	26%	42	1,627
Malaysia	30%	42	507
China	23%	44	6,486
Singapore	25%	44	385
Thailand	29%	45	621
Philippines	32%	50	881
Indonesia	27%	58	364
India	24%	73	894
AUSTRALIANS	32%	29	2,789

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Up-close animal encounters (n=6,645)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

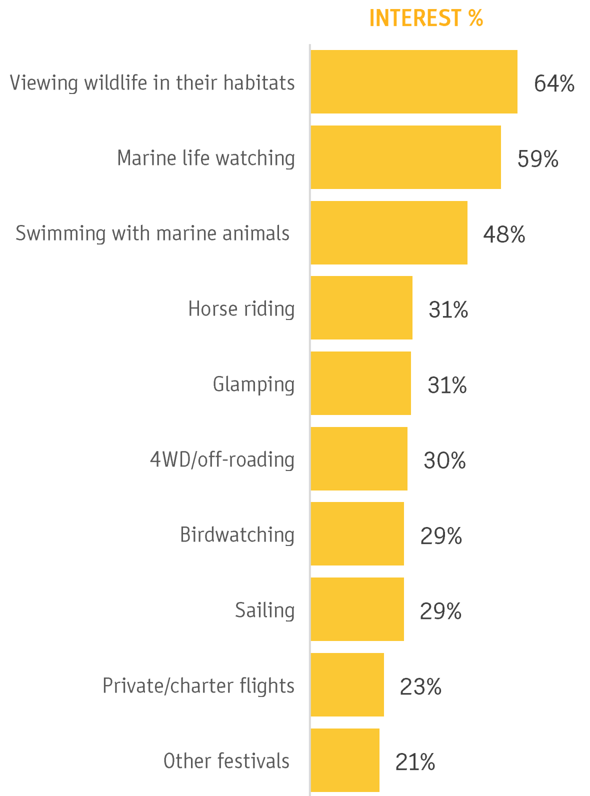
UP-CLOSE ANIMAL ENCOUNTERS

NATURE • WILDLIFE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

DEMOGRAPHIC PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	38%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	33%
	Older Families	16%	15%
AGE	18-29	30%	32%
	30-39	26%	28%
	40-49	22%	22%
	50-64	22%	18%
	Average age	38	37
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Love animals and proximity to animals is appealing
- Travelling with children who enjoy animal encounters

WHY SOME DO NOT

- Cost conscious
- Safety concerns e.g., allergies, danger of animal

HERO DESTINATIONS

- Destinations with known wildlife
- Kangaroos in Australia
- Elephant sanctuaries in Thailand

It's a very soothing activity to do, whenever it's possible for me to encounter animals I love doing that.

HIGH YIELD TRAVELLER, INDIA

We love animal encounters as long as they are unique so doing this with animals besides those you see on a farm would make this better.

HIGH YIELD TRAVELLER, UNITED STATES

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Up-close animal encounters (n=6,645)

Significantly higher than those not interested (blue)

Significantly lower than those not interested (red)

TOURISM AUSTRALIA

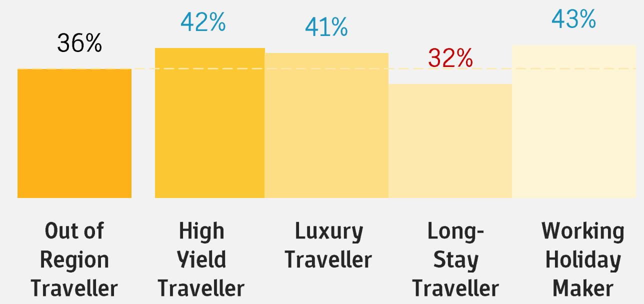
WHALE / DOLPHIN / MARINE LIFE WATCHING

NATURE • WILDLIFE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- More than a third of Out of Region Travellers are interested in marine life watching experiences
- The German market finds this experience particularly appealing, ranking 8th in total interest level out of 89 experiences
- Among those interested in marine life watching, exploration is the key travel motivation, followed by getting into nature and reconnection
- Opportunities to cross-sell or package with a range of other experiences including aurora exploration, up-close animal encounters, swimming with marine life, and snorkelling

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	18%
	Exploration	17%	20%
	Adventure	14%	12%
	Transformation	13%	11%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	36%	21	42,070
Germany	41%	8	2,338
UK	39%	13	3,786
France	36%	13	2,678
Hong Kong	41%	16	515
New Zealand	41%	17	304
India	40%	18	1,474
USA	37%	19	9,650
Japan	33%	20	2,624
Taiwan	45%	20	1,206
Singapore	35%	21	546
Canada	35%	22	2,175
Malaysia	39%	22	642
Vietnam	40%	23	851
Italy	35%	23	1,086
China	26%	31	7,429
South Korea	27%	36	2,647
Philippines	37%	37	1,043
Thailand	33%	39	688
Indonesia	28%	53	387
AUSTRALIANS	37%	22	3,219

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Whale / dolphin / marine life watching (n=7,998)

Significantly higher than those not interested   *Significantly lower than those not interested*

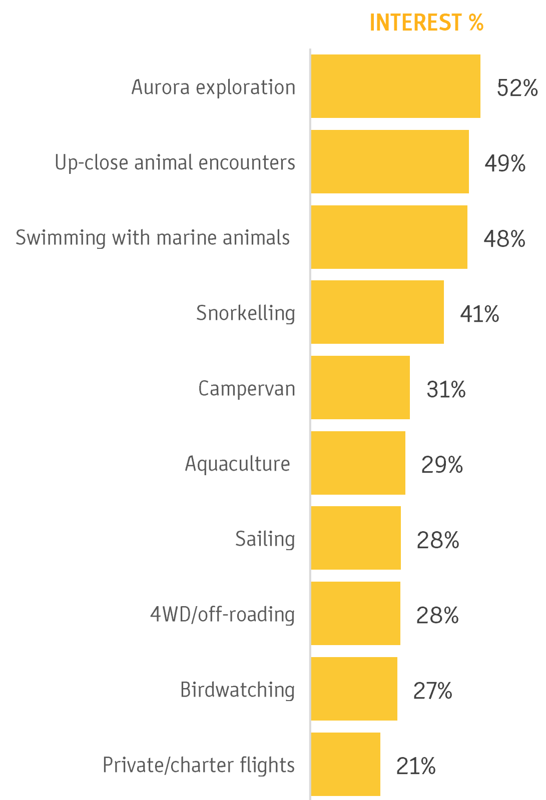
WHALE / DOLPHIN / MARINE LIFE WATCHING

NATURE • WILDLIFE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	32%
	Older Families	16%	17%
AGE	18-29	30%	29%
	30-39	26%	26%
	40-49	22%	23%
	50-64	22%	22%
	Average age	38	38
GENDER	Male	50%	44%
	Female	50%	56%
INCOME	Low	25%	24%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Observing aquatic animals in their natural habitat sparks excitement
• Magical experience especially for those who live in land and do not commonly see marine life

WHY SOME DO NOT

• Not interested in marine life
• Safety concerns or do not enjoy being near or being on boats
• Environmental concerns for animals and their habitat

HERO DESTINATIONS

• Coastal destinations with abundant marine life
• Destinations with established marine tourism e.g., Australia, Indonesia, Maldives etc.

The conservation experience might be cool, I'd just need to hear more about it. And I'm realizing that I have been on multiple marine life boat tours, so that should probably be in the "must do" column! I was supposed to swim with whale sharks and it fell through, which still bums me out!

HIGH YIELD TRAVELLER, UNITED STATES

I have been looking at the sustainability in Mauritius already as I really wanted to go swimming with dolphins but I've read that some of the speedboats that take tourists out where the pods are can be really bad for them.

HIGH YIELD TRAVELLER, UNITED KINGDOM

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Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Whale / dolphin / marine life watching (n=7,998)

Significantly higher than those not interested

Significantly lower than those not interested

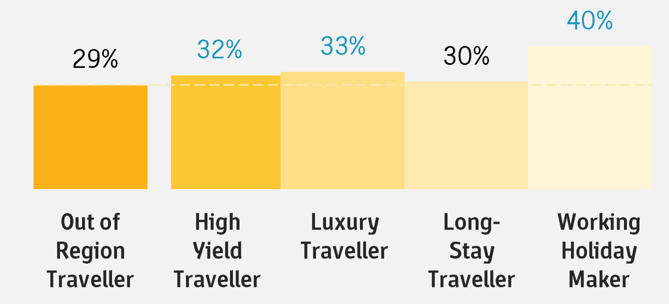
SWIMMING IN THE SEA WITH MARINE ANIMALS

NATURE • WILDLIFE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall 29% of Out of Region Travellers are interested in swimming with marine life, with stronger interest among key segments – particularly Working Holiday Makers
- This experience is particularly appealing to most Western markets, including France, the UK, USA, Italy and New Zealand, plus Australia
- Those interested in swimming with marine life tend to be younger, particularly young families, with a skew towards females and high incomes
- Other wildlife experiences and water-based adventure activities represent strong cross-sell opportunities

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	14%
	Transformation	13%	13%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	30%	37	35,318
France	35%	16	2,591
UK	36%	21	3,452
Germany	32%	26	1,814
USA	32%	26	8,563
Italy	34%	28	1,048
New Zealand	35%	28	262
Japan	28%	30	2,246
Canada	28%	36	1,740
Vietnam	34%	36	731
India	35%	36	1,271
Singapore	25%	42	390
Taiwan	27%	49	719
South Korea	23%	50	2,272
Indonesia	29%	51	388
Hong Kong	22%	53	280
China	20%	53	5,755
Malaysia	26%	54	440
Philippines	30%	54	836
Thailand	25%	57	522
AUSTRALIANS	35%	23	3,084

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Swimming in the sea with marine animals e.g. dolphins (n=6,620)

Significantly higher than those not interested

Significantly lower than those not interested

SWIMMING IN THE SEA WITH MARINE ANIMALS

NATURE • WILDLIFE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	35%
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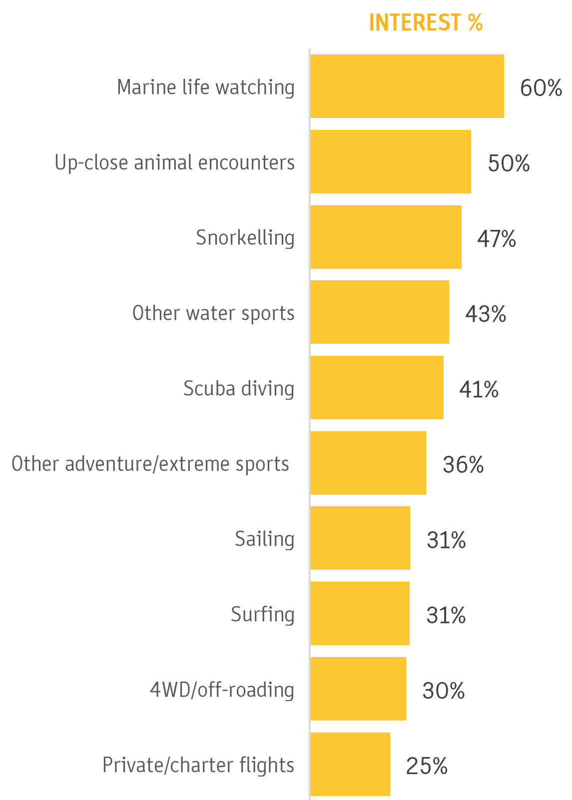
AGE	18-29	30%	33%
	30-39	26%	28%
	40-49	22%	21%
	50-64	22%	18%
	Average age	38	37
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	22%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Swimming in the sea with marine animals e.g. dolphins (n=6,620)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

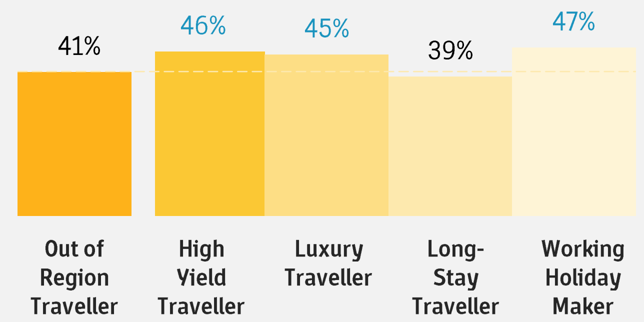
VIEWING WILDLIFE IN THEIR NATURAL ENVIRONMENT

NATURE • WILDLIFE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Viewing wildlife in their natural environment is broadly appealing across many markets, and ranked as the sixth most appealing experience (of 89 tested) for travellers from the UK
- Stronger interest among High Yield and Luxury travellers and Working Holiday Makers
- Australia features strongly in the consideration set of those interested in viewing wildlife in natural environments
- Cross-sell opportunities include other wildlife- (including marine animals) and nature-based experiences, and some adventure activities

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	19%
	Exploration	17%	20%
	Adventure	14%	12%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	5%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	41%	13	47,645
UK	44%	6	4,241
India	49%	9	1,800
Germany	41%	9	2,288
Italy	47%	11	1,448
New Zealand	46%	11	342
USA	40%	12	10,618
Singapore	41%	12	633
France	37%	12	2,761
Vietnam	45%	14	958
Canada	41%	15	2,506
China	33%	17	9,570
Malaysia	40%	18	663
Philippines	47%	18	1,314
Hong Kong	40%	20	492
Indonesia	41%	20	557
Japan	30%	25	2,332
Taiwan	40%	27	1,085
Thailand	37%	27	779
South Korea	33%	29	3,256
AUSTRALIANS	44%	11	3,823

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Viewing wildlife in their natural environment e.g. safari, wildlife walk (n=9,024)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

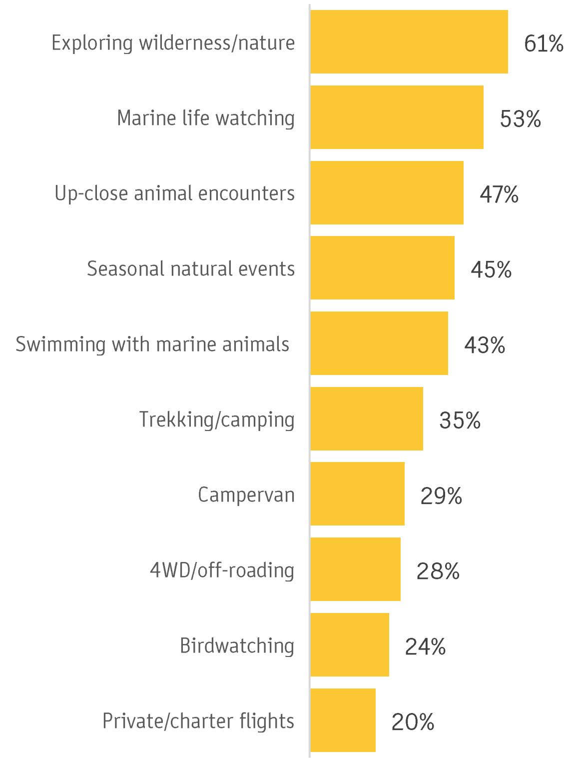
VIEWING WILDLIFE IN THEIR NATURAL ENVIRONMENT

NATURE • WILDLIFE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	33%
	Older Families	16%	16%
AGE	18-29	30%	29%
	30-39	26%	26%
	40-49	22%	23%
	50-64	22%	22%
	Average age	38	39
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Perceived as less harmful way to observe animals than at the zoo
- Immersive experience that connects you to animals and nature
- See animals that are unique to the destination and environment
- Learn more about the ecology of the destination

WHY SOME DO NOT

- Time and cost concern as it may be hard to get to specific destinations where wildlife can be viewed in natural habitat
- Safety concerns about being close to dangerous wildlife

HERO DESTINATIONS

- Destinations known for their ecology
- Africa, Serengeti regions for a safari experience
- Australia for kangaroos, koalas, and aquatic life
- Southeast Asia e.g., Sri Lanka elephants

I love this because it never fails to entertain the kids, they will always be amazed by such experiences. The sense of adventure definitely increases. I love getting in touch with wildlife and seeing how they live, I feel humans should connect to nature more

HIGH YIELD TRAVELLER, SINGAPORE

To see animals that we don't normally see, we have to go somewhere far...like a national park in Africa. You can't go to Africa easily, so it's going to be another once-in-a-lifetime experience.

HIGH YIELD TRAVELLER, SOUTH KOREA

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Viewing wildlife in their natural environment e.g. safari, wildlife walk (n=9,024)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

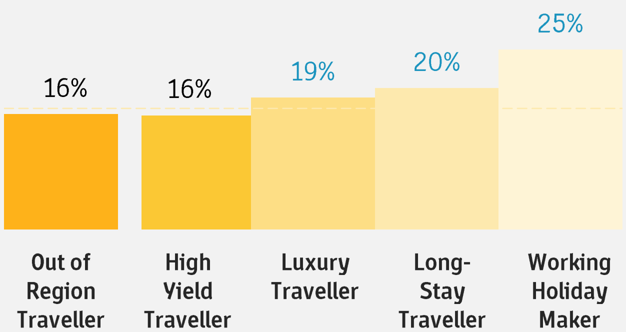
BIRDWATCHING

NATURE • WILDLIFE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Birdwatching is of interest to 16% of Out of Region Travellers overall, but a quarter of Working Holiday Makers and just over a third of Indian travellers
- Those interested in birdwatching tend to be younger, particularly young families
- Australia features strongly in the consideration and intention mix among travellers interested in birdwatching
- Cross-sell opportunities include Indigenous craft workshops, aquaculture and sailing

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	13%
	Into Nature	17%	22%
	Exploration	17%	16%
	Adventure	14%	16%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	16%	81	19,228
India	34%	38	1,251
France	16%	61	1,188
Japan	14%	67	1,095
UK	16%	74	1,566
Indonesia	19%	74	255
China	15%	75	4,230
Taiwan	15%	75	415
Philippines	25%	76	700
Italy	13%	77	408
Hong Kong	15%	78	183
USA	15%	78	4,059
Thailand	17%	78	369
Canada	14%	80	892
Germany	13%	80	721
Vietnam	19%	80	404
South Korea	10%	82	1,024
New Zealand	15%	84	110
Singapore	12%	86	180
Malaysia	11%	88	178
AUSTRALIANS	13%	84	1,144

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Birdwatching (n=3,660)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

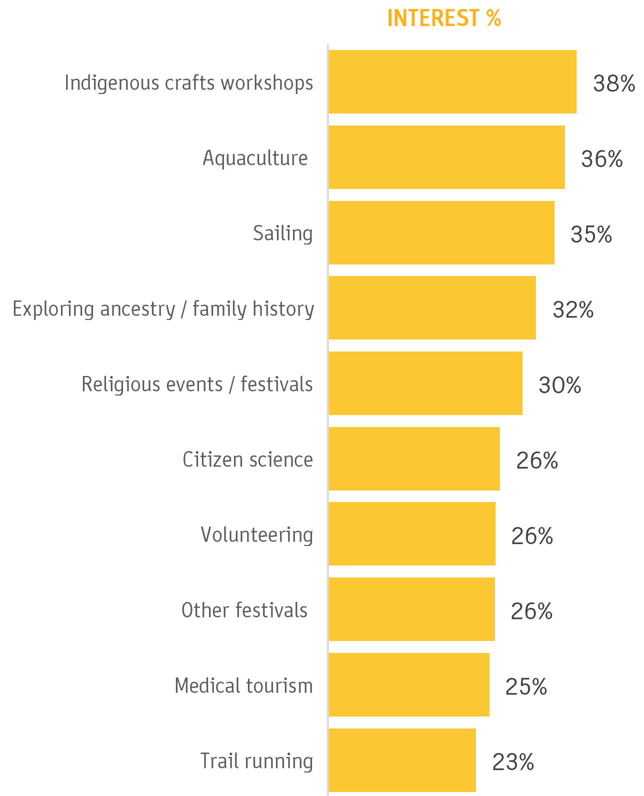
BIRDWATCHING

NATURE • WILDLIFE

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	36%
	Older Families	16%	15%
AGE	18-29	30%	33%
	30-39	26%	28%
	40-49	22%	20%
	50-64	22%	19%
	Average age	38	37
GENDER	Male	50%	50%
	Female	50%	50%
INCOME	Low	25%	26%
	Middle	28%	26%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Passionate about birds i.e. learning and observing them
• Enjoy experiencing wildlife and being outdoors

WHY SOME DO NOT

• Not interested in birds

HERO DESTINATIONS

• Any destination with notable bird species, wildlife, and nature
• Australia
• South American destinations e.g., Galapagos Islands

In this list I would include birdwatching, learning about different birds and maybe combine that with some photography lessons beforehand so then travelers could know how to use a camera well and photograph the birds that they see.

HIGH YIELD TRAVELLER, UNITED STATES

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Birdwatching (n=3,660)

Significantly higher than those not interested (blue)

Significantly lower than those not interested (red)

TOURISM AUSTRALIA

ADVENTURE

WATER-BASED

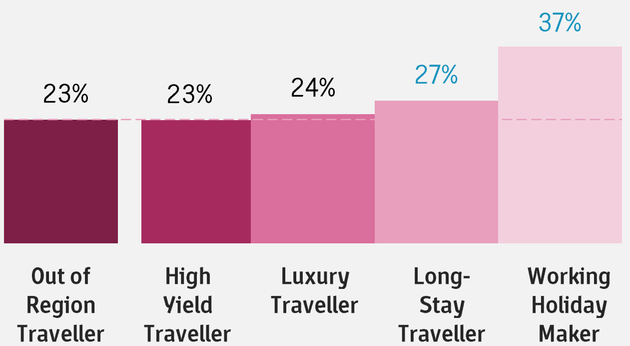
SCUBA DIVING

ADVENTURE • WATER-BASED

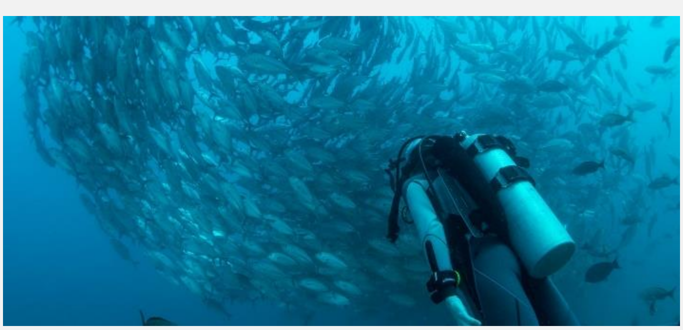
https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost a quarter of Out of Region travellers are interested in scuba diving experiences, with stronger interest among long-stay audiences
- Compared to other experiences tested, diving ranks most highly among travellers from Japan and France
- Those interested in scuba diving are more likely to be male, younger (particularly 18-29), and earn higher incomes
- Strong cross-sell opportunities with other aquatic activities, including snorkelling and swimming with marine wildlife, as well as other water and adventure/extreme sports

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	17%
	Exploration	17%	18%
	Adventure	14%	17%
	Transformation	13%	14%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	18%



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	23%	60	27,326
Japan	30%	24	2,380
France	28%	26	2,043
India	35%	30	1,285
Germany	25%	39	1,410
South Korea	26%	39	2,581
Philippines	34%	46	947
Italy	26%	46	795
Canada	24%	47	1,496
UK	24%	49	2,288
USA	22%	55	5,842
New Zealand	23%	60	172
Vietnam	27%	66	572
Malaysia	24%	66	391
Singapore	17%	76	269
Thailand	18%	76	376
Hong Kong	15%	77	191
Indonesia	16%	80	221
Taiwan	12%	80	337
China	13%	85	3,731
AUSTRALIANS	21%	59	1,863

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

SCUBA DIVING

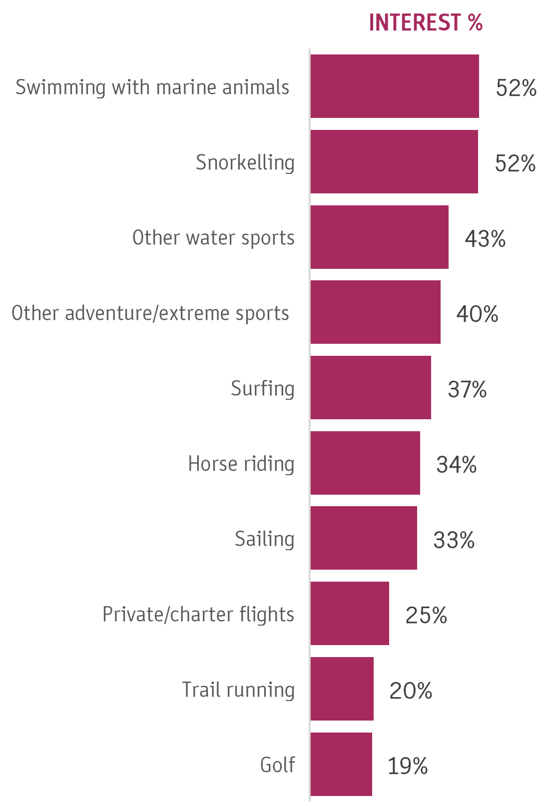
ADVENTURE • WATER-BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

DEMOGRAPHIC PROFILE

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	41%
	Older Singles/Couples (45+)	16%	10%
	Young Families	32%	35%
	Older Families	16%	15%
AGE	18-29	30%	38%
	30-39	26%	28%
	40-49	22%	20%
	50-64	22%	14%
	Average age	38	35
GENDER	Male	50%	53%
	Female	50%	47%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Passionate about water activities
- Enjoy scuba diving in different locations on holiday
- Interested in observing aquatic animals in their natural habitat

WHY SOME DO NOT

- Do not enjoy being in the water
- Safety concerns of scuba diving

HERO DESTINATIONS

- Destinations with beautiful weather and diverse marine life
- Famed scuba diving locations e.g., Galapagos Islands, Australia's Great Barrier Reef

We are enjoying ourselves with the many activities such as bungee jumping, skydiving, trekking and scuba diving lined up for us

HIGH YIELD TRAVELLER, SINGAPORE

I would want to explore underwater activities like scuba diving… I am a water baby and I have an immense love for water

HIGH YIELD TRAVELLER, INDIA

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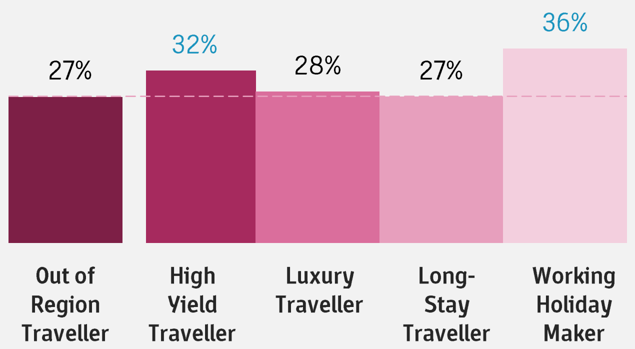
SNORKELLING

ADVENTURE • WATER-BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- More than a quarter of Out of Region Travellers are interested in snorkelling, with stronger interest among High Yield Travellers and Working Holiday Makers
- Snorkelling ranks relatively highly in the experience mix for South Korea and the USA, which together account for around 11.7 million travellers per year interested in this experience
- Those interested in snorkelling tend to be slightly younger, with higher incomes and a slight skew towards females
- Swimming with marine animals is a strong cross-sell opportunity, as well as scuba diving and other water sports

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	14%
	Transformation	13%	12%
	Passion, hobbies	14%	15%
	Restoration	7%	6%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	28%	44	32,374
South Korea	35%	24	3,385
USA	32%	27	8,360
Canada	31%	28	1,914
Japan	29%	29	2,268
Taiwan	38%	30	1,025
New Zealand	34%	30	255
UK	29%	31	2,847
Hong Kong	31%	32	391
Germany	30%	33	1,678
Thailand	31%	42	652
Singapore	24%	49	371
Italy	24%	50	730
Malaysia	27%	51	456
Philippines	31%	52	852
Indonesia	28%	55	382
China	17%	65	4,773
France	13%	72	964
Vietnam	22%	74	460
India	17%	84	610
AUSTRALIANS	34%	27	2,950

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Snorkelling (n=6,095)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

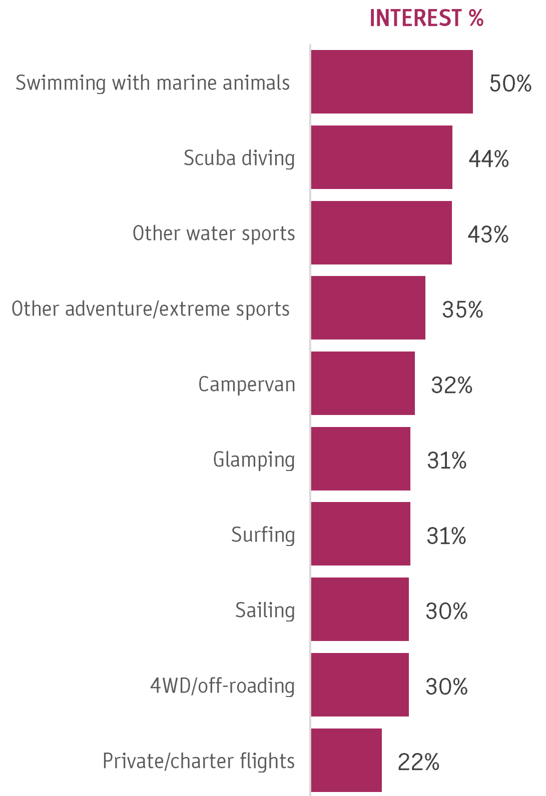
SNORKELLING

ADVENTURE • WATER-BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	34%
	Older Families	16%	15%
AGE	18-29	30%	31%
	30-39	26%	28%
	40-49	22%	22%
	50-64	22%	19%
	Average age	38	37
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Snorkelling (n=6,095)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

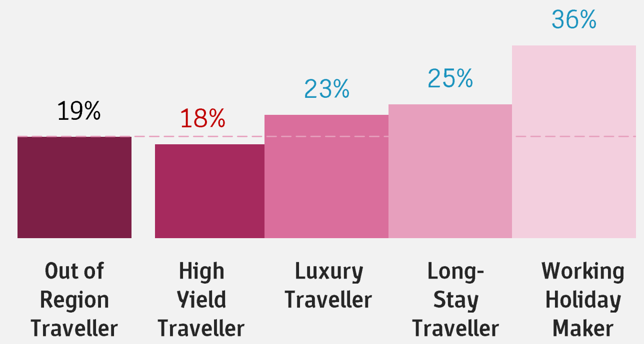
SURFING

ADVENTURE • WATER-BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall 1 in 5 Out of Region Travellers are interested in surfing, with greatest interest among the Working Holiday Maker segment
- Greatest interest from Eastern markets, ranking particularly highly in China (29th out of 89 experiences)
- Those interested in surfing tend to be younger (particularly under 30) with a slight skew to males
- This audience is more likely to be motivated by adventure, engaging in passions or hobbies, or transformation as key travel needs
- Strong cross-sell opportunities include other adventure activities such as scuba diving, extreme sports and mountain/rock sports

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	13%
	Into Nature	17%	18%
	Exploration	17%	15%
	Adventure	14%	18%
	Transformation	13%	15%
	Passion, hobbies	14%	16%
	Restoration	7%	5%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Surfing (n=4,304)

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	19%	74	24,647
China	26%	29	7,480
India	33%	42	1,224
Vietnam	30%	48	645
Philippines	32%	49	898
South Korea	21%	55	2,070
Germany	18%	60	1,038
Canada	18%	67	1,139
France	13%	70	971
UK	17%	70	1,645
USA	17%	71	4,406
Japan	12%	73	960
Malaysia	19%	75	310
Thailand	18%	75	386
Indonesia	18%	77	241
Italy	13%	79	400
New Zealand	16%	81	122
Singapore	15%	81	231
Taiwan	12%	82	331
Hong Kong	12%	83	150
AUSTRALIANS	14%	83	1,259

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

SURFING

ADVENTURE • WATER-BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	42%
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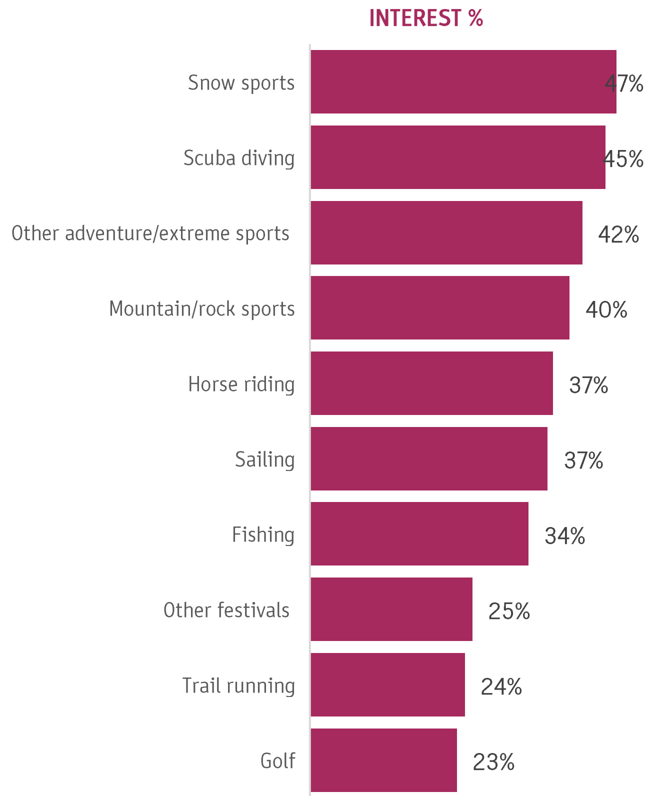
	30-39	26%	30%
	40-49	22%	17%
	50-64	22%	10%
	Average age	38	33
GENDER	Male	50%	53%
	Female	50%	47%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Passionate about surfing or have a strong desire to learn
- Destination is known for surfing and interested in trying something new e.g., Hawaii
- Enjoy being physically active on holiday

WHY SOME DO NOT

- Do not enjoy being in the water or know how to swim
- Safety concerns
- Do not enjoy being physically active on holiday

HERO DESTINATIONS

- Beach, island, coastal destinations where water activities are common
- Destinations where surfing is part of the culture e.g., Hawaii, Australia, Costa Rica, etc.

My wife again - we're travelling to Costa Rica together and are both the same skill level when it comes to surfing and yoga

HIGH YIELD TRAVELLER, UNITED KINGDOM

I would like to be able to surf, but I'm to chicken the big waves and I'm scared of sharks

HIGH YIELD TRAVELLER, NEW ZEALAND

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fiftyfive5 *Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Surfing (n=4,304)*

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

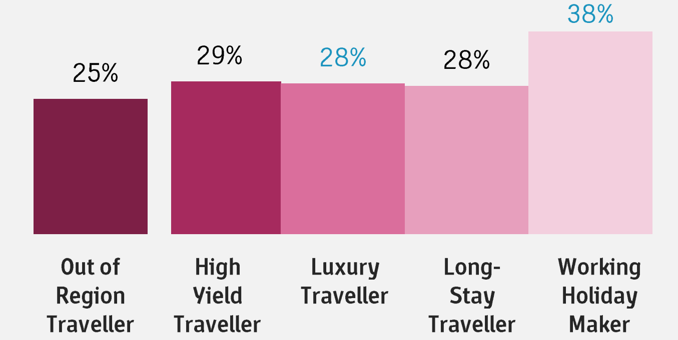
OTHER WATER SPORTS

ADVENTURE • WATER-BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, a quarter are interested in water sports, with strongest interest among Working Holiday Makers
- This audience skews younger (particularly under 30), with higher incomes
- Among those interested in water sports, paddle sports attract the greatest interest, followed by rafting and jet skiing
- Cross-sell opportunities include swimming with marine life, snorkelling, scuba diving and a range of other adventure activities

INTEREST IN THE EXPERIENCE BY SEGMENT

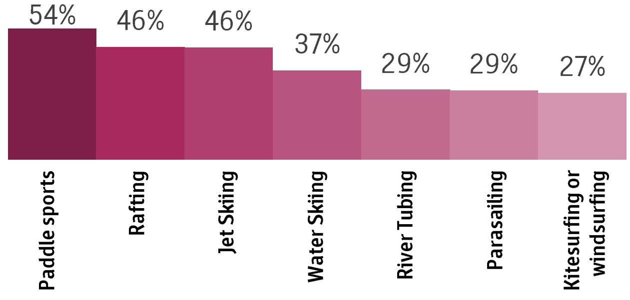


	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	17%
	Exploration	17%	18%
	Adventure	14%	15%
	Transformation	13%	14%
	Passion, hobbies	14%	16%
	Restoration	7%	5%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	25%	53	31,173
New Zealand	32%	32	243
Vietnam	35%	33	752
Taiwan	32%	34	871
Canada	28%	35	1,746
USA	28%	36	7,521
China	24%	38	7,031
Germany	25%	41	1,384
UK	26%	46	2,474
France	20%	47	1,510
Japan	17%	53	1,367
Thailand	25%	54	538
Indonesia	27%	56	369
South Korea	21%	56	2,021
Malaysia	25%	58	424
Italy	19%	60	603
Singapore	22%	62	333
Hong Kong	20%	63	243
Philippines	29%	64	797
India	26%	68	946
AUSTRALIANS	25%	49	2,223

INTEREST IN SUB-EXPERIENCES



fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Other water sports e.g. rafting, kayaking, paddleboarding, windsurfing (n=5,652)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

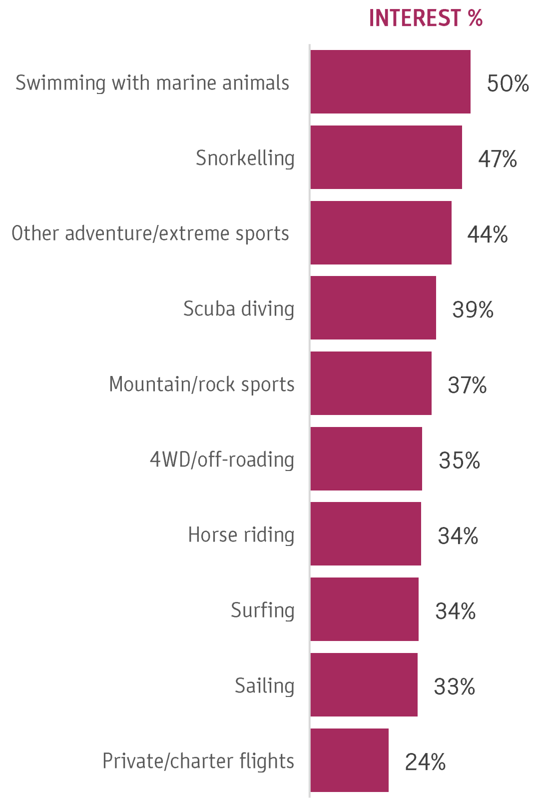
OTHER WATER SPORTS

ADVENTURE • WATER-BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

DEMOGRAPHIC PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	39%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	34%
	Older Families	16%	15%
AGE	18-29	30%	36%
	30-39	26%	27%
	40-49	22%	20%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	23%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Enjoy being in and around water
- Prefer to be active during holidays
- Passionate about sport activities

WHY SOME DO NOT

- Do not swim
- Safety concerns with water activities

HERO DESTINATIONS

- Destinations close to a lake and/or sea
- Beach and Island platforms e.g., Cayman Island, Australia, Thailand, Philippines

I love being out on the water! Whether it's snorkeling, kayaking, stand-up paddle boarding, jet skiing, waterskiing or sailing – it's all fun! What makes it even better is if the water is warm

HIGH YIELD TRAVELLER, UNITED STATES

I think it would be fun to go white water rafting as long as the rapids were not to rough it would be perfect for me.

HIGH YIELD TRAVELLER, UNITED STATES

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Other water sports e.g. rafting, kayaking, paddleboarding, windsurfing (n=5,652)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

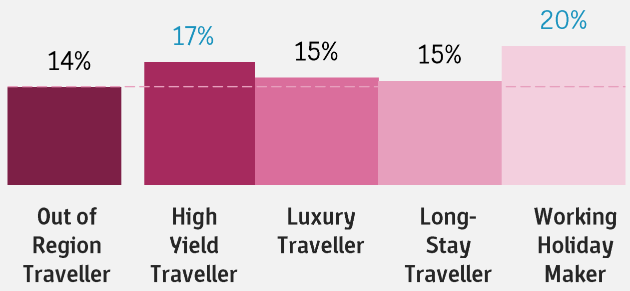
PADDLE SPORTS

ADVENTURE • WATER-BASED • OTHER WATER SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, more than 1 in 10 are interested in paddle sports, with strongest interest from the Working Holiday Maker segment
- Top 3 markets interested in paddle sports are New Zealand, Canada and the USA
- This audience skews towards females and higher income levels
- Those interested in paddle sports have strong consideration of Australia and are more likely to be motivated by adventure needs

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	14%	16,866
New Zealand	22%	164
Canada	20%	1,267
USA	17%	4,544
Vietnam	17%	361
Philippines	17%	470
UK	16%	1,590
Malaysia	16%	271
Thailand	15%	308
Germany	13%	749
Taiwan	13%	356
Indonesia	12%	164
China	12%	3,425
France	12%	867
Italy	11%	352
Singapore	11%	167
Hong Kong	11%	134
India	10%	356
South Korea	9%	872
Japan	8%	658
AUSTRALIANS	17%	1,477

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	38%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	32%
	Older Families	16%	16%
AGE	18-29	30%	32%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	19%
	Average age	38	37
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	22%
	Middle	28%	26%
	High	24%	24%
	Very high	22%	27%
TRAVELLER MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	14%
	Transformation	13%	12%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	18%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Paddle sports (kayaking, canoeing, stand-up paddleboarding) (n=2,430)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

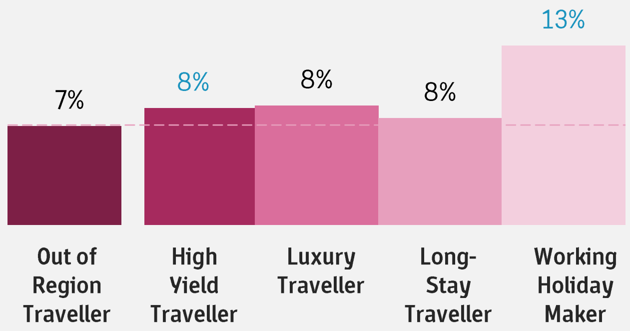
KITESURFING OR WINDSURFING

ADVENTURE • WATER-BASED • OTHER WATER SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Kitesurfing or windsurfing attracts relatively niche appeal overall, with 7% interested on average globally
- Interest levels are almost twice as strong among Working Holiday Makers
- Vietnam and China are the markets with a greater interest in kitesurfing or windsurfing
- Those interested in kitesurfing or windsurfing tend to be a younger demographic and more likely to travel to fulfil transformation needs
- This audience have strong consideration and Intention to holiday in Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	7%	8,551
Vietnam	14%	294
China	11%	3,023
Taiwan	9%	230
Philippines	8%	234
Malaysia	8%	134
Thailand	8%	160
India	7%	253
Hong Kong	7%	85
South Korea	7%	654
USA	7%	1,717
Singapore	6%	97
Italy	6%	188
New Zealand	6%	44
Germany	6%	330
UK	5%	530
Indonesia	5%	75
Canada	5%	319
Japan	4%	330
France	4%	305
AUSTRALIANS	4%	381

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	40%
	Older Singles/Couples (45+)	16%	8%
	Young Families	32%	39%
	Older Families	16%	13%
AGE	18-29	30%	38%
	30-39	26%	28%
	40-49	22%	21%
	50-64	22%	12%
	Average age	38	35
GENDER	Male	50%	51%
	Female	50%	49%
INCOME	Low	25%	23%
	Middle	28%	25%
	High	24%	27%
	Very high	22%	25%
TRAVELLER MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	17%
	Exploration	17%	15%
	Adventure	14%	16%
	Transformation	13%	16%
	Passion, hobbies	14%	16%
	Restoration	7%	5%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	20%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Kitesurfing or windsurfing (n=1,240)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

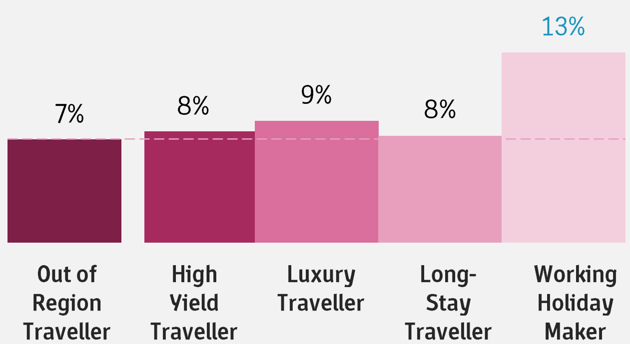
PARASAILING

ADVENTURE • WATER-BASED • OTHER WATER SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Parasailing attracts quite niche appeal globally, with 7% interested on average but stronger demand from Working Holiday Makers
- A number of Eastern markets have comparatively stronger interest in parasailing, while only 2% of Italians are interested
- Travellers interested in parasailing are more likely to be motivated by transformation needs or seek to engage in specific passions/hobbies
- This audience skew towards younger ages, both singles/couples and young families, and are more likely to be female
- Those interested in parasailing have strong interest in visiting Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	7%	8,899
Philippines	13%	351
Vietnam	12%	249
India	10%	382
Singapore	9%	141
Malaysia	8%	140
Taiwan	8%	227
USA	8%	2,129
Indonesia	8%	108
Canada	8%	485
New Zealand	7%	51
Hong Kong	6%	78
China	6%	1,773
France	6%	444
UK	6%	564
Japan	6%	438
Germany	5%	297
South Korea	5%	472
Thailand	5%	98
Italy	2%	68
AUSTRALIANS	7%	581

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	40%
	Older Singles/Couples (45+)	16%	9%
	Young Families	32%	37%
	Older Families	16%	14%
AGE	18-29	30%	36%
	30-39	26%	30%
	40-49	22%	20%
	50-64	22%	14%
	Average age	38	35
GENDER	Male	50%	45%
	Female	50%	55%
INCOME	Low	25%	24%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	24%
TRAVELLER MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	16%
	Exploration	17%	17%
	Adventure	14%	16%
	Transformation	13%	16%
	Passion, hobbies	14%	16%
	Restoration	7%	5%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	19%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Parasailing (n=1,287)

● *Significantly higher than those not interested*
● *Significantly lower than those not interested*

TOURISM AUSTRALIA

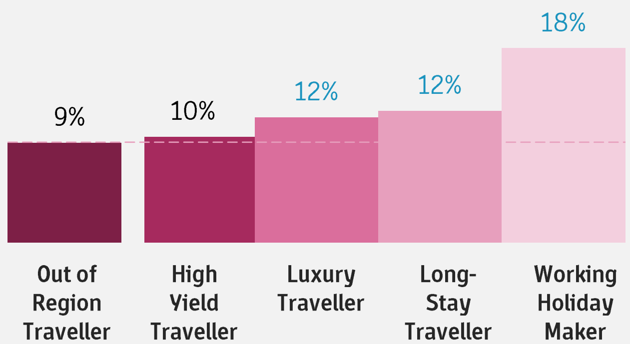
WATER SKIING

ADVENTURE • WATER-BASED • OTHER WATER SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost one in ten Out of Region Travellers are interested in water skiing, with highest interest among Working Holiday Makers
- The Indian market has the strongest demand for this experience
- Those interested in water skiing skew much younger and earn above-average incomes
- This audience has strong consideration and intention to visit Australia, and are most likely to seek adventure and transformation when they travel

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	9%	11,475
India	16%	582
Malaysia	15%	244
Vietnam	14%	296
Philippines	12%	348
Taiwan	10%	269
China	9%	2,697
Indonesia	9%	125
Singapore	9%	141
UK	9%	835
USA	8%	2,245
Thailand	8%	174
Hong Kong	8%	103
Germany	8%	459
New Zealand	8%	57
South Korea	7%	677
Japan	7%	546
Canada	7%	408
Italy	6%	198
France	6%	425
AUSTRALIANS	8%	664

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	40%
	Older Singles/Couples (45+)	16%	7%
	Young Families	32%	38%
	Older Families	16%	14%
AGE	18-29	30%	40%
	30-39	26%	30%
	40-49	22%	19%
	50-64	22%	11%
	Average age	38	34
GENDER	Male	50%	50%
	Female	50%	50%
INCOME	Low	25%	23%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	25%
TRAVELLER MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	16%
	Exploration	17%	16%
	Adventure	14%	17%
	Transformation	13%	17%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	21%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Water skiing (n=1,698)

● Significantly higher than those not interested

● Significantly lower than those not interested

TOURISM AUSTRALIA

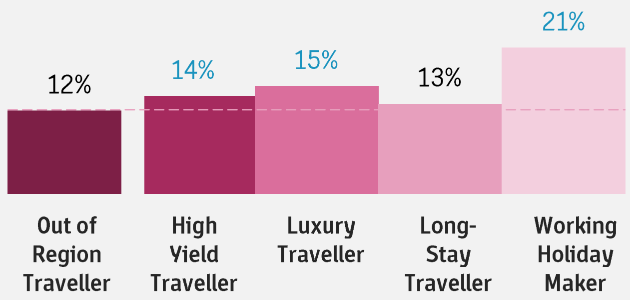
JET SKIING

ADVENTURE • WATER-BASED • OTHER WATER SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Just over 1 in 10 Out of Region Travellers are interested in jet skiing, with markedly stronger demand from Working Holiday Makers
- Emerging markets of Philippines, Vietnam and Taiwan have greater interest in this experience, as well as New Zealand
- Those interested in jet skiing skew younger (mostly 18-29), particularly without children
- This audience has above-average interest in visiting Australia, and is more likely to travel to engage in their hobbies and passions

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	12%	14,405
Philippines	18%	495
Vietnam	17%	368
Taiwan	17%	464
New Zealand	16%	117
Indonesia	14%	185
USA	13%	3,541
Italy	13%	391
Germany	12%	698
Hong Kong	11%	143
India	11%	394
UK	11%	1,019
Singapore	10%	157
France	10%	749
Canada	10%	593
Malaysia	9%	156
Thailand	9%	198
Japan	8%	604
China	7%	2,135
South Korea	6%	632
AUSTRALIANS	11%	975

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	41%
	Older Singles/Couples (45+)	16%	10%
	Young Families	32%	34%
	Older Families	16%	15%
AGE	18-29	30%	39%
	30-39	26%	27%
	40-49	22%	20%
	50-64	22%	15%
	Average age	38	35
GENDER	Male	50%	51%
	Female	50%	49%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	24%
TRAVELLER MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	16%
	Exploration	17%	18%
	Adventure	14%	14%
	Transformation	13%	12%
	Passion, hobbies	14%	16%
	Restoration	7%	7%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Jet skiing (n=2,070)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

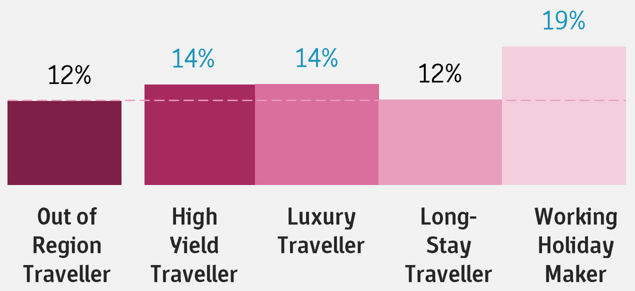
RAFTING

ADVENTURE • WATER-BASED • OTHER WATER SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 12% of Out of Region Travellers are specifically interested in rafting experiences, with significantly higher interest among higher-yielding segments and Working Holiday Makers
- Rafting is of higher interest to a number of Eastern markets
- Those interested in rafting skew towards young families and tend to have higher incomes
- Nature is the dominant travel motivation for this audience, and they have strong interest in visiting Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	12%	14,455
Taiwan	20%	550
Indonesia	18%	245
Thailand	17%	357
India	14%	502
New Zealand	13%	96
China	13%	3,614
USA	12%	3,270
Malaysia	12%	197
Philippines	11%	307
Canada	11%	673
Singapore	10%	162
Vietnam	10%	217
UK	10%	956
South Korea	10%	959
Italy	10%	303
Germany	10%	543
Hong Kong	9%	114
France	7%	540
Japan	6%	469
AUSTRALIANS	11%	947

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	36%
	Older Families	16%	18%
AGE	18-29	30%	32%
	30-39	26%	28%
	40-49	22%	22%
	50-64	22%	18%
	Average age	38	37
GENDER	Male	50%	51%
	Female	50%	49%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	23%
	Very high	22%	26%
TRAVELLER MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	19%
	Exploration	17%	17%
	Adventure	14%	13%
	Transformation	13%	14%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	18%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Rafting (n=2,106)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

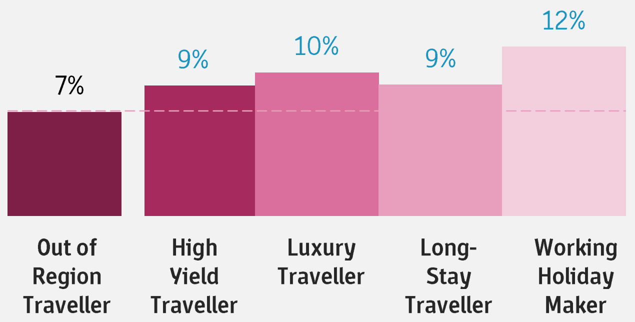
RIVER TUBING

ADVENTURE • WATER-BASED • OTHER WATER SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average 7% are interested in river tubing, with significantly greater interest among key traveller segments
- River tubing attracts higher interest levels among travellers from Canada, New Zealand and USA
- This audience skews towards higher incomes
- Those interested in river tubing show strong consideration and intention to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	7%	8,992
Canada	13%	834
New Zealand	12%	93
USA	12%	3,249
Thailand	12%	258
India	11%	415
Vietnam	9%	193
Taiwan	7%	193
China	7%	1,955
Hong Kong	7%	82
UK	7%	636
Philippines	6%	178
Indonesia	6%	87
South Korea	6%	621
Singapore	6%	87
Malaysia	5%	89
Germany	5%	257
France	3%	259
Italy	3%	91
Japan	2%	186
AUSTRALIANS	9%	817

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	34%
	Older Families	16%	17%
AGE	18-29	30%	33%
	30-39	26%	27%
	40-49	22%	23%
	50-64	22%	18%
	Average age	38	37
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	22%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	26%
TRAVELLER MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	18%
	Exploration	17%	14%
	Adventure	14%	16%
	Transformation	13%	16%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	21%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in River tubing (n=1,341)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

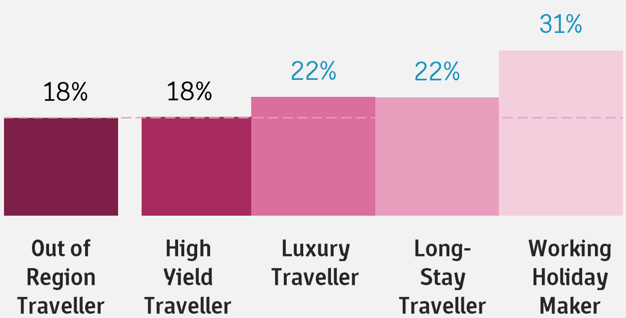
SAILING

ADVENTURE • WATER-BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Just under 1 in 5 Out of Region Travellers are interested in sailing, with markedly higher interest among Working Holiday Makes
- This audience is more likely to seek adventure as a motivation for travel
- Australia features strongly in the consideration and intention set among those interested in sailing
- Cross-sell opportunities include other water sports, scuba diving and surfing, as well as horse riding, birdwatching and charter flights

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	18%
	Exploration	17%	18%
	Adventure	14%	16%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	48%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	18%	78	20,972
Thailand	29%	46	615
Italy	23%	51	718
Vietnam	28%	56	609
Philippines	29%	57	817
USA	20%	62	5,340
Canada	19%	63	1,179
Malaysia	22%	69	371
Indonesia	22%	70	293
China	15%	72	4,309
South Korea	13%	72	1,299
New Zealand	18%	74	135
UK	16%	75	1,537
Germany	14%	76	795
India	21%	77	784
Taiwan	13%	77	361
France	10%	80	720
Japan	9%	82	740
Singapore	14%	82	217
Hong Kong	11%	85	131
AUSTRALIANS	16%	79	1,393

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Sailing (n=3,997)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

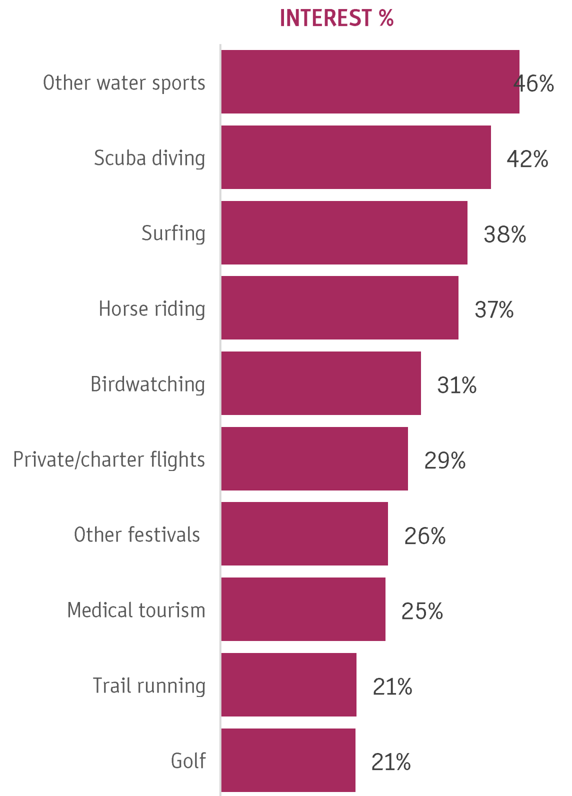
SAILING

ADVENTURE • WATER-BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

DEMOGRAPHIC PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	36%
	Older Families	16%	16%
AGE	18-29	30%	35%
	30-39	26%	27%
	40-49	22%	21%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	50%
	Female	50%	50%
INCOME	Low	25%	24%
	Middle	28%	24%
	High	24%	26%
	Very high	22%	26%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Sailing (n=3,997)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

ADVENTURE

LAND & SKY BASED

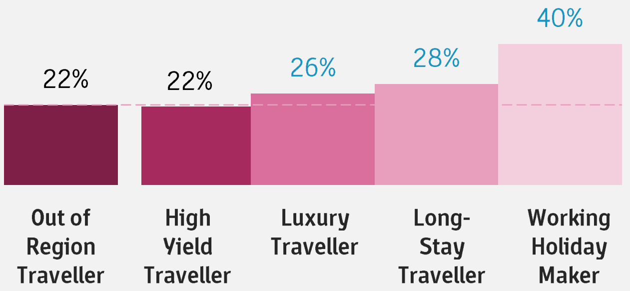
OTHER ADVENTURE/EXTREME SPORTS

ADVENTURE • LAND & SKY BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 22% are interested in other adventure or extreme sports, increasing to 40% among the Working Holiday Maker segment
- This experience is significantly less appealing to travellers from the UK and Europe region, as well as Hong Kong and Australia
- Those interested in this experience skew younger and are more likely to travel to engage in passions or jobbies or in pursuit of adventure
- Among those interested in other adventure or extreme sports, skydiving leads in appeal, followed by ziplining, then hang-/para-gliding and quad biking/ATV
- Cross-sell opportunities include other adventure activities including water sports, scuba diving, mountain/rock sports and surfing

INTEREST IN THE EXPERIENCE BY SEGMENT

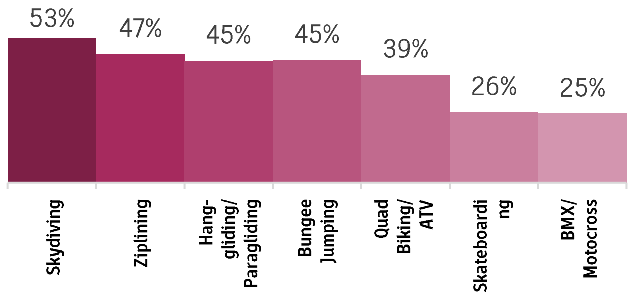


	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	16%
	Exploration	17%	17%
	Adventure	14%	16%
	Transformation	13%	14%
	Passion, hobbies	14%	17%
	Restoration	7%	5%
	Consideration of Australia	37%	45%
	Actively planning to visit Australia	15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	22%	61	26,852
Philippines	39%	35	1,085
China	22%	45	6,412
India	32%	45	1,178
South Korea	24%	46	2,354
Vietnam	30%	49	636
Canada	22%	54	1,354
Japan	17%	57	1,303
Singapore	22%	58	339
Taiwan	23%	58	614
New Zealand	23%	59	175
USA	21%	59	5,511
France	16%	60	1,221
UK	20%	61	1,887
Germany	17%	63	947
Indonesia	23%	65	319
Malaysia	23%	68	379
Italy	16%	69	495
Hong Kong	19%	69	231
Thailand	20%	74	413
AUSTRALIANS	19%	64	1,697

INTEREST IN SUB-EXPERIENCES



fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Other adventure/extreme sports e.g. sky diving, bungee jumping, quad biking, ziplining (n=5,036)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

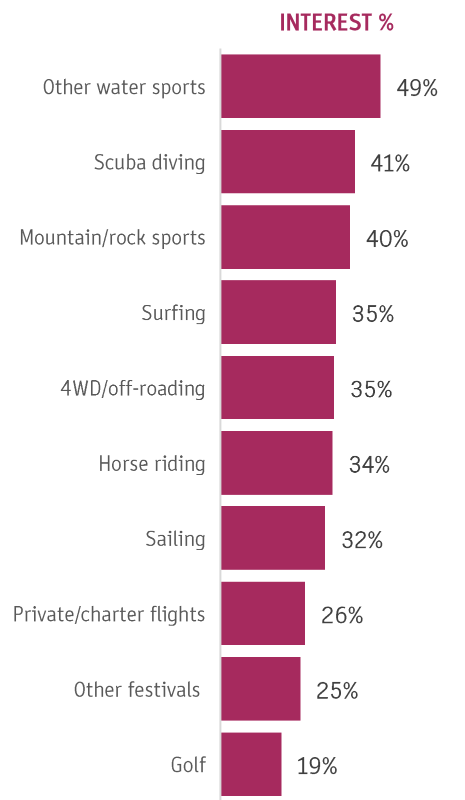
OTHER ADVENTURE/EXTREME SPORTS

ADVENTURE • LAND & SKY BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	42%
	Older Singles/Couples (45+)	16%	8%
	Young Families	32%	37%
	Older Families	16%	14%
AGE	18-29	30%	40%
	30-39	26%	29%
	40-49	22%	19%
	50-64	22%	13%
	Average age	38	35
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	25%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS
- Passionate about extreme sports / activities
- Untamed and invigorating experience
- Enjoy pushing oneself to the limit and out of comfort zone

WHY SOME DO NOT
- Safety concerns e.g., fear of injury
- Do not enjoy extreme activities and sports
- Not fit for children or elderly travellers

I just don't think I'm brave enough for some of those extreme sports activities!
HIGH YIELD TRAVELLER, UNITED STATES

Extreme sports scare me, I break easily!
HIGH YIELD TRAVELLER, UNITED KINGDOM

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Other adventure/extreme sports e.g. sky diving, bungee jumping, quad biking, ziplining (n=5,036)

Significantly higher than those not interested

Significantly lower than those not interested

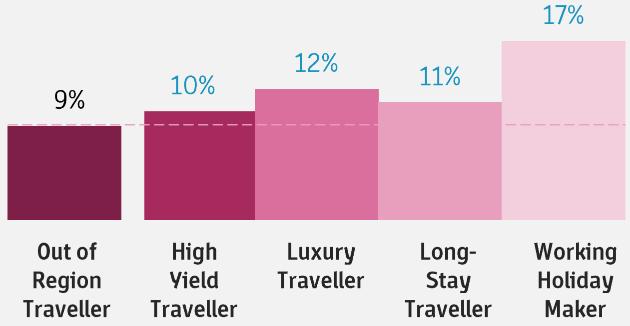
QUAD BIKING/ATV

ADVENTURE • LAND & SKY BASED • OTHER ADVENTURE AND EXTREME SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost one in ten Out of Region travellers are interested in quad biking/ATV adventure sport experiences, with greater interest across key segments – most notably Working Holiday Makers
- Interest is strongest in the Indonesian market, while just 2% of Japanese travellers are interested
- The profile of those interested in this experience skews towards younger, across different lifestages (singles/couples and young families)
- This audience is more likely to travel to engage in their passions/hobbies, and have strong interest in visiting Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	9%	10,593
Indonesia	13%	176
New Zealand	11%	83
Philippines	11%	303
Vietnam	10%	213
Taiwan	10%	267
Canada	10%	601
Malaysia	9%	157
Italy	9%	289
Hong Kong	9%	114
UK	9%	867
Germany	9%	504
Singapore	8%	131
China	8%	2,323
France	8%	563
USA	7%	1,977
India	7%	266
Thailand	7%	149
South Korea	7%	637
Japan	2%	169
AUSTRALIANS	8%	680

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	40%
	Older Singles/Couples (45+)	16%	10%
	Young Families	32%	38%
	Older Families	16%	13%
AGE	18-29	30%	38%
	30-39	26%	30%
	40-49	22%	19%
	50-64	22%	13%
	Average age	38	35
GENDER	Male	50%	51%
	Female	50%	49%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	24%
TRAVELLER MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	16%
	Exploration	17%	17%
	Adventure	14%	16%
	Transformation	13%	13%
	Passion, hobbies	14%	18%
	Restoration	7%	5%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	21%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Quad biking/ATV (n=1,735)

● Significantly higher than those not interested

● Significantly lower than those not interested

TOURISM AUSTRALIA

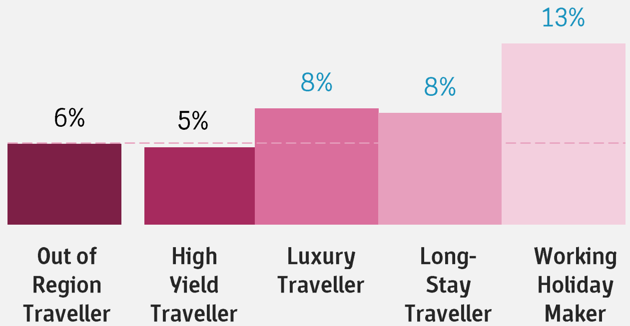
BMX/MOTOCROSS

ADVENTURE • LAND & SKY BASED • OTHER ADVENTURE AND EXTREME SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- At an overall global level, BMX/motocross attracts niche appeal with 6% of Out of Region Travellers interested in this adventure sport
- Working Holiday Makers show the strongest interest in this activity, and interest is above average in a number of South East Asian markets and China
- Those interested in BMX/motocross experiences tend to be younger, with a heavy male skew
- This audience is more likely to travel to meet adventure needs or engage in their passions or hobbies, and has strong interest in Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	6%	6,789
Philippines	10%	278
Vietnam	8%	174
China	8%	2,186
Thailand	7%	155
Indonesia	7%	97
India	7%	248
France	6%	464
Singapore	6%	96
Malaysia	6%	103
Taiwan	6%	151
Hong Kong	5%	66
Canada	5%	295
New Zealand	4%	33
Germany	4%	246
USA	4%	1,078
Italy	4%	118
UK	4%	348
Japan	3%	257
South Korea	3%	307
AUSTRALIANS	4%	349

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	39%
	Older Singles/Couples (45+)	16%	7%
	Young Families	32%	41%
	Older Families	16%	13%
AGE	18-29	30%	43%
	30-39	26%	28%
	40-49	22%	17%
	50-64	22%	11%
	Average age	38	34
GENDER	Male	50%	60%
	Female	50%	40%
INCOME	Low	25%	23%
	Middle	28%	27%
	High	24%	24%
	Very high	22%	25%
TRAVELLER MOTIVATIONS	Reconnection	17%	12%
	Into Nature	17%	16%
	Exploration	17%	14%
	Adventure	14%	20%
	Transformation	13%	16%
	Passion, hobbies	14%	16%
	Restoration	7%	6%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	22%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in BMX/motocross (n=1,098)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

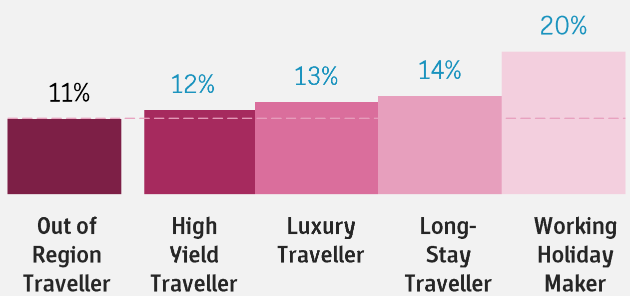
ZIPLINING

ADVENTURE • LAND & SKY BASED • OTHER ADVENTURE AND EXTREME SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Just over 1 in 10 Out of Region Travellers are specifically interested in ziplining experiences, with stronger demand from key segments – particularly Working Holiday Makers
- Philippines, Indonesia, North America, New Zealand and South Korea have higher interest in ziplining, with France least interested
- Those interested in ziplining skew younger, particularly young singles/couples, with greater representation of females
- This audience is more likely to travel to engage in their passions or hobbies, and have high consideration and intention for Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	11%	12,614
Philippines	25%	709
Indonesia	17%	233
Canada	16%	968
New Zealand	15%	110
USA	13%	3,388
South Korea	12%	1,215
UK	11%	1,072
Hong Kong	11%	135
Vietnam	11%	229
India	10%	372
Taiwan	9%	253
Singapore	9%	142
China	9%	2,522
Germany	8%	470
Thailand	8%	173
Malaysia	8%	125
Italy	5%	165
Japan	3%	250
France	1%	84
AUSTRALIANS	11%	1,004

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	44%
	Older Singles/Couples (45+)	16%	9%
	Young Families	32%	34%
	Older Families	16%	13%
AGE	18-29	30%	40%
	30-39	26%	29%
	40-49	22%	19%
	50-64	22%	12%
	Average age	38	35
GENDER	Male	50%	45%
	Female	50%	55%
INCOME	Low	25%	25%
	Middle	28%	27%
	High	24%	24%
	Very high	22%	24%
TRAVELLER MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	17%
	Exploration	17%	18%
	Adventure	14%	15%
	Transformation	13%	12%
	Passion, hobbies	14%	17%
	Restoration	7%	5%
Consideration of Australia		37%	48%
Actively planning to visit Australia		15%	20%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Ziplining (n=2,067)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

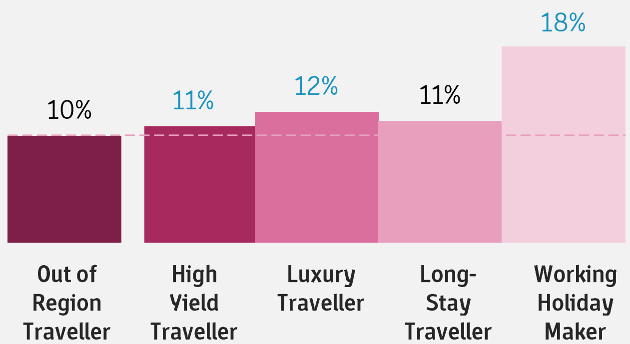
HANG-GLIDING/PARAGLIDING

ADVENTURE • LAND & SKY BASED • OTHER ADVENTURE AND EXTREME SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 1 in 10 Out of Region travellers are interested in hang-gliding/paragliding, with strongest interest among Working Holiday Makers
- This experience is generally more appealing to Eastern markets, while less than 1 in 10 from Western markets are interested
- Those interested in this experience skew younger, particularly young singles/couples without children
- This audience is more likely to travel to engage in their passions or hobbies, and have high consideration and intention for Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	10%	11,969
Vietnam	15%	326
Philippines	13%	367
Taiwan	13%	347
South Korea	12%	1,221
Indonesia	12%	164
Hong Kong	12%	145
Malaysia	12%	194
India	11%	420
Singapore	10%	162
Thailand	10%	206
China	10%	2,756
Canada	9%	548
New Zealand	8%	61
France	8%	592
Japan	7%	571
Italy	7%	222
Germany	7%	370
USA	7%	1,723
UK	6%	567
AUSTRALIANS	6%	544

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	42%
	Older Singles/Couples (45+)	16%	9%
	Young Families	32%	35%
	Older Families	16%	14%
AGE	18-29	30%	37%
	30-39	26%	30%
	40-49	22%	19%
	50-64	22%	14%
	Average age	38	35
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	24%
TRAVELLER MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	15%
	Transformation	13%	13%
	Passion, hobbies	14%	17%
	Restoration	7%	5%
Consideration of Australia		37%	48%
Actively planning to visit Australia		15%	21%

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Hang-gliding/paragliding (n=1,924)

Significantly higher than those not interested

Significantly lower than those not interested

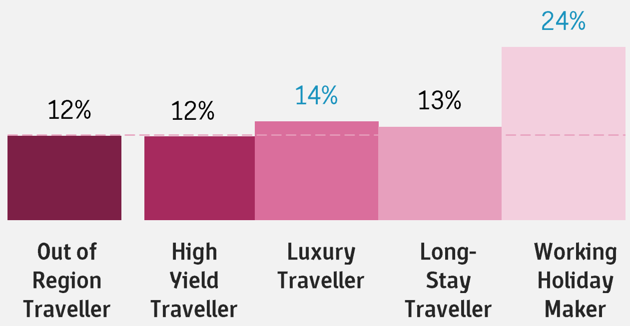
SKYDIVING

ADVENTURE • LAND & SKY BASED • OTHER ADVENTURE AND EXTREME SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Just over 1 in 10 Out of Region Travellers are interested in skydiving, with stronger demand from Luxury Travellers and particularly Working Holiday Makers
- Several Eastern markets show higher interest in this experience, while Europe and the UK and US have the lowest interest
- Those interested in skydiving skew much younger, particularly young singles or couples
- This audience is more likely to travel for adventure needs or to engage in their passions/hobbies, and has strong interest in Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	12%	14,165
Philippines	27%	740
India	21%	766
Vietnam	17%	360
Malaysia	14%	235
Taiwan	14%	381
New Zealand	12%	91
Singapore	12%	184
Indonesia	12%	159
Thailand	11%	240
Japan	11%	881
Hong Kong	11%	137
Canada	11%	653
South Korea	10%	1,015
China	10%	2,955
France	9%	670
UK	9%	844
USA	7%	1,850
Germany	7%	382
Italy	5%	153
AUSTRALIANS	10%	839

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	45%
	Older Singles/Couples (45+)	16%	7%
	Young Families	32%	36%
	Older Families	16%	12%
AGE	18-29	30%	45%
	30-39	26%	28%
	40-49	22%	18%
	50-64	22%	9%
	Average age	38	33
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	25%
	Middle	28%	28%
	High	24%	24%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	17%
	Exploration	17%	18%
	Adventure	14%	16%
	Transformation	13%	13%
	Passion, hobbies	14%	16%
	Restoration	7%	5%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	20%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Skydiving (n=2,306)

● Significantly higher than those not interested

● Significantly lower than those not interested

TOURISM AUSTRALIA

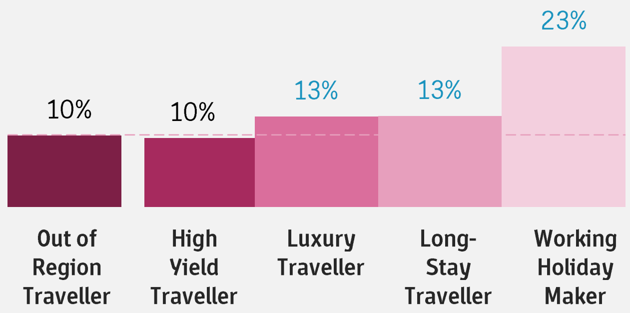
BUNGEE JUMPING

ADVENTURE • LAND & SKY BASED • OTHER ADVENTURE AND EXTREME SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 1 in 10 Out of Region Travellers are interested in bungee jumping, with greatest interest from Working Holiday Makers
- Those interested in bungee jumping skew much younger, particularly young singles or couples without dependent children
- This audience is more likely to travel to fulfil their need for adventure or to engage in passions or hobbies, has high consideration and intention to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	10%	11,991
Philippines	21%	593
India	19%	707
Taiwan	12%	329
Indonesia	12%	165
Vietnam	12%	247
New Zealand	11%	85
Malaysia	11%	182
China	11%	3,144
Singapore	10%	161
Thailand	10%	207
South Korea	9%	873
Canada	8%	514
Hong Kong	8%	94
UK	7%	709
France	7%	534
Italy	7%	210
USA	7%	1,778
Japan	6%	438
Germany	6%	312
AUSTRALIANS	8%	711

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	44%
	Older Singles/Couples (45+)	16%	7%
	Young Families	32%	37%
	Older Families	16%	12%
AGE	18-29	30%	44%
	30-39	26%	29%
	40-49	22%	18%
	50-64	22%	10%
	Average age	38	33
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	25%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	22%
TRAVELLER MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	16%
	Exploration	17%	16%
	Adventure	14%	17%
	Transformation	13%	14%
	Passion, hobbies	14%	16%
	Restoration	7%	5%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	20%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Bungee jumping (n=1,986)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

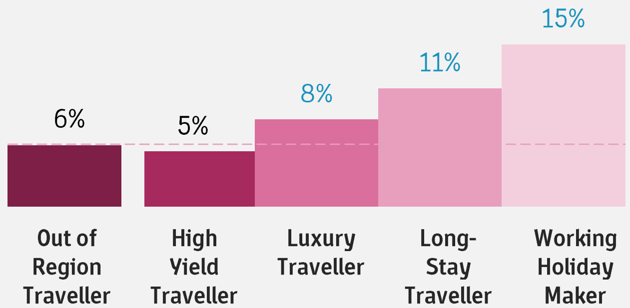
SKATEBOARDING

ADVENTURE • LAND & SKY BASED • OTHER ADVENTURE AND EXTREME SPORTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Skateboarding attracts more niche levels of demand, with 6% of Out of Region Travellers interested
- Interest in skateboarding is higher among Luxury and Long-Stay Travellers, and strongest among Working Holiday Makers
- Interest is generally stronger in Eastern markets, while less than 1 in 20 from any Western market are interested
- Those interested in skateboarding skew much younger, and are more likely to be families with young children, and higher income earners
- This audience is more likely to be motivated to travel for adventure and transformation needs or to engage in their passions or hobbies, and they have high consideration and intention to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	6%	6,905
India	13%	486
Vietnam	13%	269
Philippines	11%	304
Malaysia	8%	138
Thailand	8%	166
China	8%	2,205
Indonesia	7%	91
Singapore	6%	99
Hong Kong	5%	66
Taiwan	5%	130
USA	4%	1,119
New Zealand	4%	29
Canada	4%	218
UK	3%	313
Germany	3%	178
Japan	3%	238
France	3%	219
South Korea	3%	272
Italy	3%	81
AUSTRALIANS	4%	366

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	5%
	Young Families	32%	44%
	Older Families	16%	15%
AGE	18-29	30%	44%
	30-39	26%	31%
	40-49	22%	15%
	50-64	22%	10%
	Average age	38	33
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	23%
	Middle	28%	26%
	High	24%	28%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	11%
	Into Nature	17%	18%
	Exploration	17%	14%
	Adventure	14%	20%
	Transformation	13%	17%
	Passion, hobbies	14%	17%
	Restoration	7%	5%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	23%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Skateboarding (n=1,136)

● Significantly higher than those not interested

● Significantly lower than those not interested

TOURISM AUSTRALIA

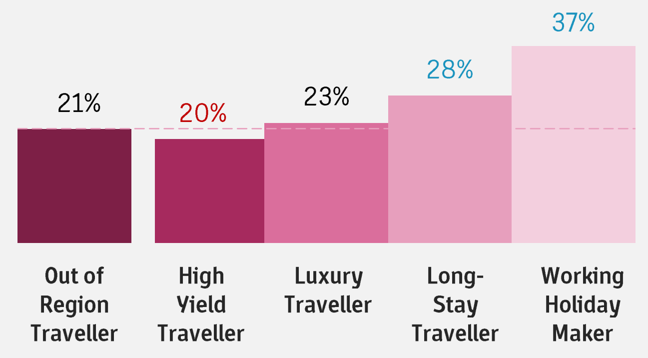
MOUNTAIN/ROCK SPORTS

ADVENTURE • LAND & SKY BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall around 1 in 10 are interested in mountain or rock sports, with higher interest among longer-stay audiences (particularly Working Holiday Makers) and several South/South East Asian markets
- This audience skews younger (particularly under 30) and tends to travel to get into nature or seek adventure
- Cross-sell opportunities include a range of other adventure experiences including trekking/camping, water sports and extreme sports

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	13%
	Into Nature	17%	20%
	Exploration	17%	17%
	Adventure	14%	17%
	Transformation	13%	14%
	Passion, hobbies	14%	15%
	Restoration	7%	4%
	Consideration of Australia	37%	45%
	Actively planning to visit Australia	15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	21%	63	25,161
India	35%	29	1,290
Philippines	34%	44	954
China	22%	49	6,303
Malaysia	26%	55	436
Vietnam	28%	55	609
Germany	20%	56	1,100
Thailand	25%	58	519
France	17%	58	1,257
Italy	20%	58	626
South Korea	18%	62	1,721
Indonesia	25%	62	337
USA	20%	63	5,224
Singapore	20%	67	305
Canada	18%	69	1,088
Hong Kong	17%	71	211
UK	17%	72	1,644
Japan	12%	72	966
Taiwan	17%	73	446
New Zealand	16%	83	122
AUSTRALIANS	17%	70	1,535

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Mountain/rock sports e.g. climbing, caving, abseiling (n=4,755)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

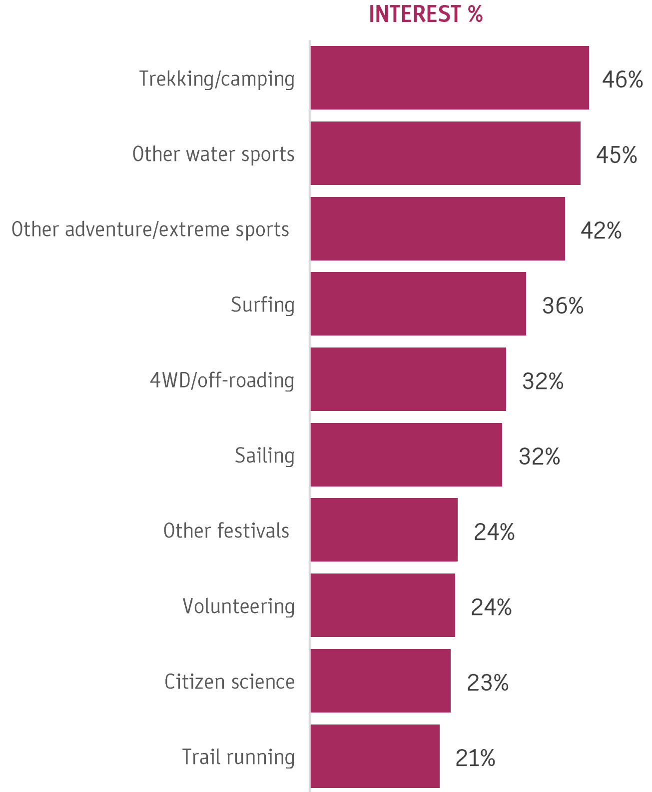
MOUNTAIN/ROCK SPORTS

ADVENTURE • LAND & SKY BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	38%
	Older Singles/Couples (45+)	16%	8%
	Young Families	32%	38%
	Older Families	16%	16%
AGE	18-29	30%	37%
	30-39	26%	29%
	40-49	22%	21%
	50-64	22%	14%
	Average age	38	35
GENDER	Male	50%	53%
	Female	50%	47%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Passionate about mountain and rock sports
- Enjoy holidays that are active

WHY SOME DO NOT

- Do not enjoy being physically active while on holiday
- Safety concern with activity

HERO DESTINATIONS

- Destinations known for climbing, abseiling, etc. e.g. Mount Everest
- US National Parks e.g., Yosemite

"*Having a great time to bond with each other and we can share our mountain climbing experience. It is a great experience which is most memorable in my lifetime.*

HIGH YIELD TRAVELLER, SINGAPORE

To see Everest and climb at least part way, to be able to say I've done it.

HIGH YIELD TRAVELLER, NEW ZEALAND"

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Mountain/rock sports e.g. climbing, caving, abseiling (n=4,755)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

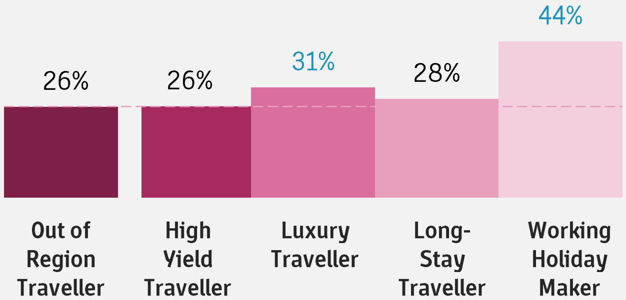
SNOW SPORTS

ADVENTURE • LAND & SKY BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall around a quarter of Out of Region Travellers are interested in snow sports, with significantly stronger interest among Luxury Travellers and Working Holiday Makers
- Several Eastern markets are more interested in snow sports
- Those interested in snow sports tend to be younger, particularly aged under 30
- Strong cross-sell opportunities with other adventure activities including water sports, scuba diving, surfing and extreme sports

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	18%
	Exploration	17%	17%
	Adventure	14%	15%
	Transformation	13%	13%
	Passion, hobbies	14%	16%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	25%	51	26,914
India	41%	17	1,505
Philippines	43%	26	1,204
Indonesia	38%	27	517
Malaysia	35%	30	580
Hong Kong	32%	31	393
Singapore	27%	35	414
China	24%	41	6,836
Taiwan	30%	41	815
Vietnam	32%	43	681
France	20%	50	1,472
Italy	20%	57	629
Germany	19%	58	1,081
Thailand	24%	60	501
Japan	16%	62	1,254
USA	19%	66	4,904
New Zealand	20%	67	152
UK	17%	69	1,660
South Korea	13%	73	1,296
Canada	17%	73	1,020
AUSTRALIANS	22%	56	1,955

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Snow sports (n=5,620)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

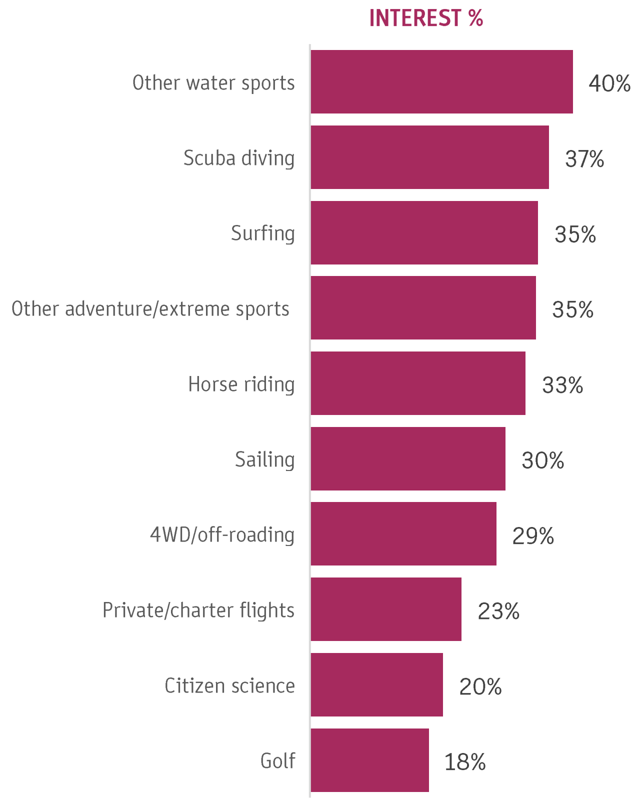
SNOW SPORTS

ADVENTURE • LAND & SKY BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	39%
	Older Singles/Couples (45+)	16%	8%
	Young Families	32%	37%
	Older Families	16%	16%
AGE	18-29	30%	38%
	30-39	26%	28%
	40-49	22%	20%
	50-64	22%	14%
	Average age	38	35
GENDER	Male	50%	51%
	Female	50%	49%
INCOME	Low	25%	25%
	Middle	28%	26%
	High	24%	25%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Appealing for those passionate about sports, adrenaline-inducing

WHY SOME DO NOT

• Fear or concern around safety, fear of injury. Lack of confidence for those who have never participated. • Too cold for some, who prefer warmer holiday locations.

HERO DESTINATIONS

• Canada • Switzerland • Austria • USA

I would like to travel to the mountains where it's completely snow covered and I could experience live snowfall, also do some snow activities. I would like to go on a mountain run and do some sports activities to keep myself fit.

HIGH YIELD TRAVELLER, INDIA

I'd be worried about getting injured or being too scared to complete extreme sports activities.

HIGH YIELD TRAVELLER, UNITED KINGDOM

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Snow sports (n=5,620)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

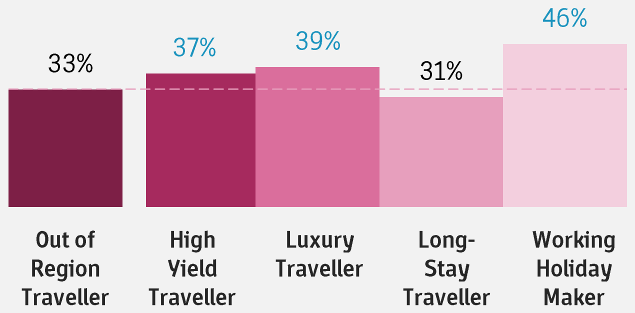
AERIAL TOURS

ADVENTURE • LAND & SKY BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall around a third of Out of Region Travellers are interested in aerial tours, with High Yield and Luxury Travellers and particularly Working Holiday Makers showing greater interest levels
- Malaysia has above-average interest in aerial tours and this experience features in their top 10 (out of 89 experiences tested)
- Among those interested in aerial tours, almost three quarters are interested in hot air ballooning, half in scenic flights and just over a third in helicopter rides
- Cross-sell opportunities include aurora exploration, water sports, extreme sports and mountain/rock sports

INTEREST IN THE EXPERIENCE BY SEGMENT

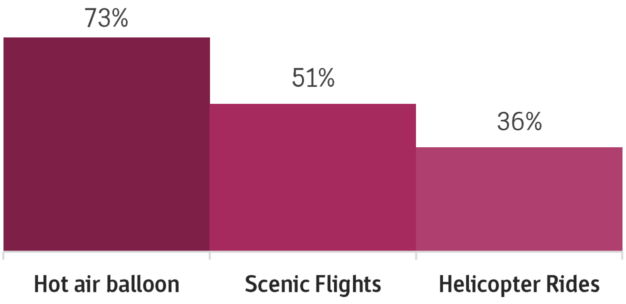


	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	18%
	Exploration	17%	21%
	Adventure	14%	12%
	Transformation	13%	13%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	33%	26	36,770
Malaysia	45%	9	753
Taiwan	45%	18	1,216
Singapore	36%	18	554
China	32%	19	9,071
Vietnam	41%	20	888
Indonesia	40%	22	544
South Korea	35%	23	3,394
Philippines	44%	24	1,226
Hong Kong	34%	24	430
Thailand	35%	30	731
Japan	25%	33	1,967
Italy	30%	35	943
Germany	26%	36	1,480
New Zealand	31%	37	232
France	24%	40	1,746
UK	26%	45	2,479
India	32%	46	1,157
USA	25%	47	6,514
Canada	23%	50	1,446
AUSTRALIANS	29%	39	2,554

INTEREST IN SUB-EXPERIENCES



fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Aerial tours e.g. hot air balloon, scenic flights (n=7,198)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

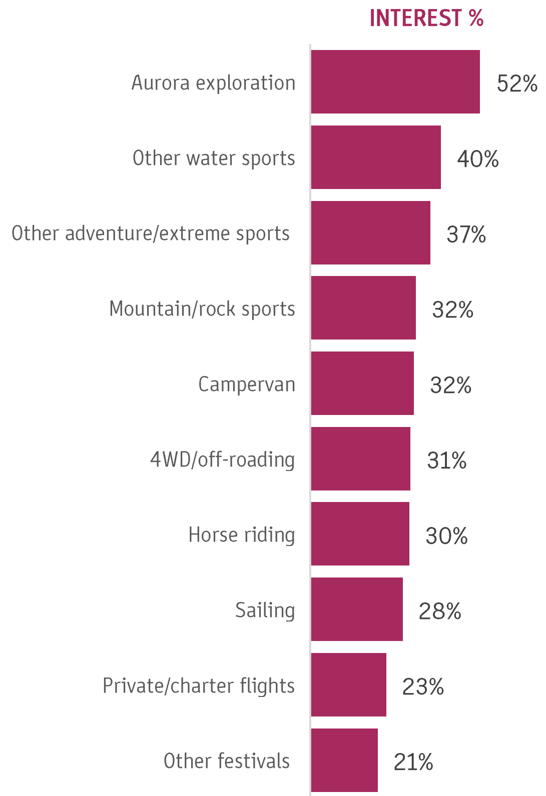
AERIAL TOURS

ADVENTURE • LAND & SKY BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	38%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	32%
	Older Families	16%	16%
AGE	18-29	30%	32%
	30-39	26%	26%
	40-49	22%	21%
	50-64	22%	20%
	Average age	38	38
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	23%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Aerial tours e.g. hot air balloon, scenic flights (n=7,198)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

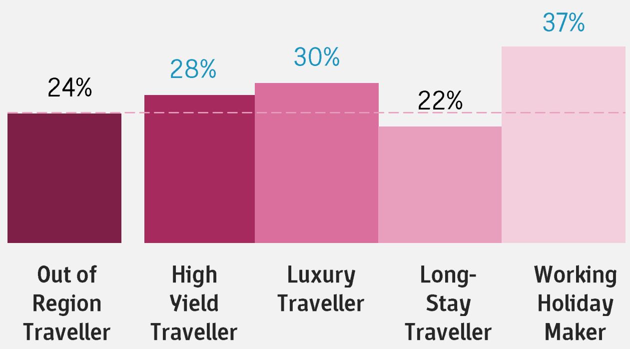
HOT AIR BALLOON

ADVENTURE • LAND & SKY BASED • AERIAL TOURS OR FLIGHTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost a quarter of Out of Region Traveller are interested in hot air ballooning, with stronger demand from higher-yielding segments and particularly Working Holiday Makers
- Hot air ballooning attracts stronger demand from a number of Eastern markets, particularly Malaysia
- This audience skews towards females, with an above-average interest in visiting Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	24%	26,987
Malaysia	40%	662
Taiwan	37%	1,000
Philippines	36%	1,002
Indonesia	32%	430
Vietnam	29%	614
Singapore	28%	435
India	27%	976
Hong Kong	26%	323
South Korea	24%	2,363
Thailand	23%	481
China	22%	6,265
Italy	21%	652
New Zealand	21%	155
UK	19%	1,820
USA	17%	4,544
Japan	17%	1,347
Canada	17%	1,037
Germany	16%	925
France	15%	1,133
AUSTRALIANS	20%	1,777

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	31%
	Older Families	16%	16%
AGE	18-29	30%	30%
	30-39	26%	26%
	40-49	22%	21%
	50-64	22%	22%
	Average age	38	38
GENDER	Male	50%	45%
	Female	50%	55%
INCOME	Low	25%	24%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	18%
	Exploration	17%	21%
	Adventure	14%	12%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	43%
Actively planning to visit Australia		15%	17%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Hot air balloon (n=3,495)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

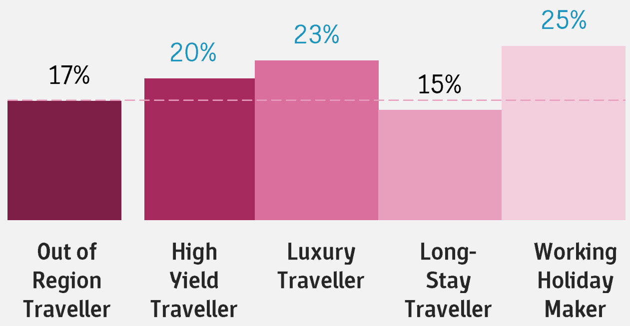
SCENIC FLIGHTS

ADVENTURE • LAND & SKY BASED • AERIAL TOURS OR FLIGHTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 17% of Out of Region Travellers are specifically interested in scenic flights, with stronger interest from higher-yielding segments and Working Holiday Makers
- China and emerging Eastern markets show the strongest interest, with China presenting a strong volume opportunity with more than 6 million outbound travellers per year interested in scenic flights
- This audience skews towards higher income levels, with above-average consideration and intention to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	17%	18,636
Taiwan	22%	606
Vietnam	22%	478
Thailand	22%	456
China	21%	6,153
Philippines	21%	597
New Zealand	18%	135
Malaysia	18%	299
Singapore	17%	269
Hong Kong	16%	205
Italy	16%	506
South Korea	16%	1,572
Indonesia	16%	214
Japan	15%	1,207
USA	14%	3,569
India	13%	485
Germany	13%	709
Canada	12%	752
UK	12%	1,159
France	11%	830
AUSTRALIANS	15%	1,330

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	32%
	Older Families	16%	16%
AGE	18-29	30%	30%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	22%
	Average age	38	38
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	21%
	Middle	28%	27%
	High	24%	27%
	Very high	22%	25%
TRAVELLER MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	12%
	Transformation	13%	14%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	17%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Scenic Flights (n=2,430)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

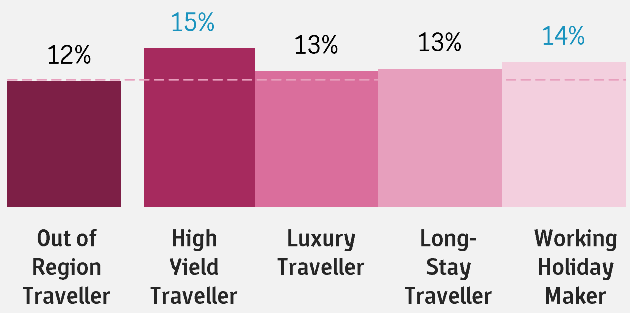
HELICOPTER RIDES

ADVENTURE • LAND & SKY BASED • AERIAL TOURS OR FLIGHTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 12% of Out of Region Travellers are interested in helicopter rides, with highest interest from the High Yield Traveller segment
- Philippines, New Zealand, India, Hong Kong, Canada and the UK have higher interest in helicopter tours
- Those interested in helicopter rides are more likely to be older singles/couples with no dependents
- This audience has high consideration and intention for Australia and is most likely to travel for exploration motivations

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	12%	13,129
Philippines	17%	475
New Zealand	16%	123
India	15%	536
Hong Kong	15%	181
Canada	14%	880
UK	14%	1,315
Germany	13%	750
Singapore	13%	205
USA	12%	3,141
Taiwan	10%	280
Malaysia	10%	168
South Korea	10%	969
Italy	10%	298
Vietnam	9%	203
France	9%	699
Japan	8%	656
Indonesia	7%	98
China	7%	1,970
Thailand	6%	117
AUSTRALIANS	15%	1,299

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	20%
	Young Families	32%	30%
	Older Families	16%	14%
AGE	18-29	30%	28%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	24%
	Average age	38	39
GENDER	Male	50%	50%
	Female	50%	50%
INCOME	Low	25%	21%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	25%
TRAVELLER MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	15%
	Exploration	17%	23%
	Adventure	14%	14%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	48%
Actively planning to visit Australia		15%	19%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Helicopter Rides (n=1,781)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

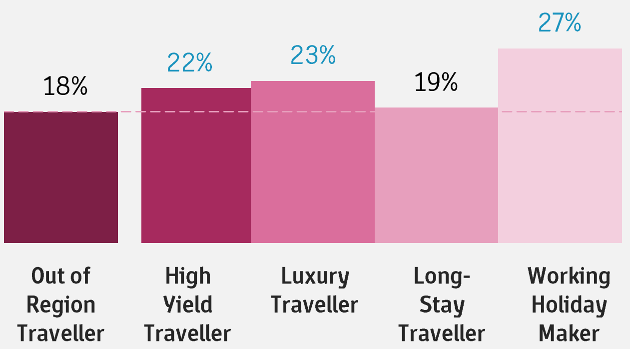
4WD/OFF-ROADING (GUIDED OR SELF-DRIVE)

ADVENTURE • LAND & SKY BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average 18% are interested in 4WD or off-roading, with stronger interest among High Yield and Luxury Travellers and Working Holiday Markets
- Those interested in 4WD/off-roading are more likely to be male
- Exploration is the primary travel motivation among those interested in this experience
- Similar interest levels for guided vs. self-drive experience, with a slight preference for guided (some travellers interested in both)
- Cross-sell opportunities include other adventure experiences including water sports, extreme sports, campervan, mountain or rock sports

INTEREST IN THE EXPERIENCE BY SEGMENT

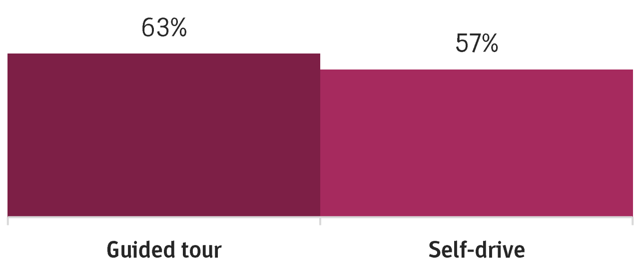


TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	17%
	Exploration	17%	20%
	Adventure	14%	13%
	Transformation	13%	13%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	18%	77	21,200
France	24%	36	1,802
Hong Kong	22%	56	270
New Zealand	23%	58	175
Japan	16%	61	1,264
Italy	19%	62	587
Taiwan	20%	66	549
China	17%	67	4,755
Malaysia	23%	67	387
Vietnam	24%	69	516
Germany	15%	70	849
Singapore	19%	71	294
Canada	17%	71	1,046
USA	17%	72	4,374
UK	16%	73	1,572
Philippines	23%	80	651
South Korea	11%	81	1,090
Thailand	14%	81	288
Indonesia	15%	83	209
India	14%	88	523
AUSTRALIANS	20%	62	1,725

INTEREST IN SUB-EXPERIENCES



fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in 4WD/off-roading (guided or self-drive) (n=4,067)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

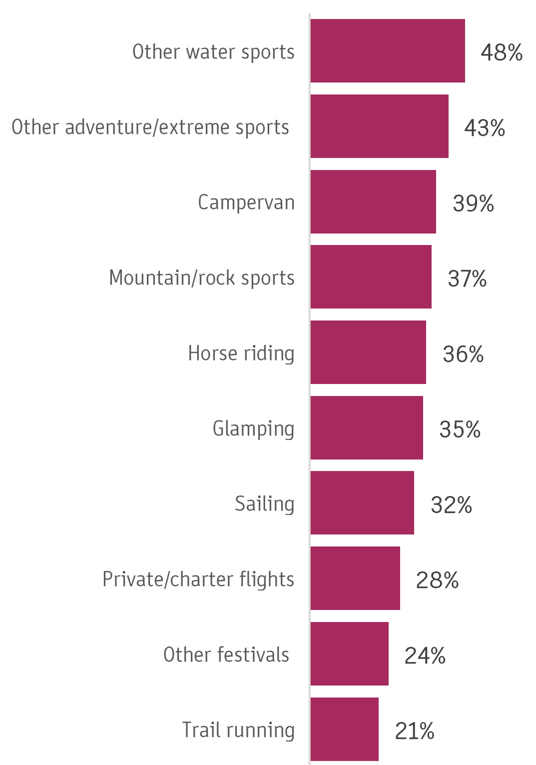
4WD/OFF-ROADING (GUIDED OR SELF-DRIVE)

ADVENTURE • LAND & SKY BASED

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	34%
	Older Families	16%	16%
AGE	18-29	30%	32%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	19%
	Average age	38	37
GENDER	Male	50%	54%
	Female	50%	46%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Niche and wild adventure experience
- Unique way to explore landscapes
- Spontaneous and freeing experience

WHY SOME DO NOT

- Uncomfortable due to rugged terrain i.e., dirt and bumpy roads
- Do not enjoy being in a car e.g., car sickness
- Logistically complex, especially for children or elderly travellers
- Safety concerns i.e., lack of infrastructure in the country

HERO DESTINATIONS

- Destinations with vast landscape, wildlife and famous national parks
- African safari
- Australia, New Zealand

"

I have driven through the Kruger National Park by car and experienced things I would never have dreamed

HIGH YIELD TRAVELLER, GERMANY

I love the spontaneous action and the high speed of the 4wd and video experience emailed to you post trip. This could entail a lasting memory

HIGH YIELD TRAVELLER, UNITED STATES

"

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in 4WD/off-roading (guided or self-drive) (n=4,067)

● *Significantly higher than those not interested* (blue)

● *Significantly lower than those not interested* (red)

TOURISM AUSTRALIA

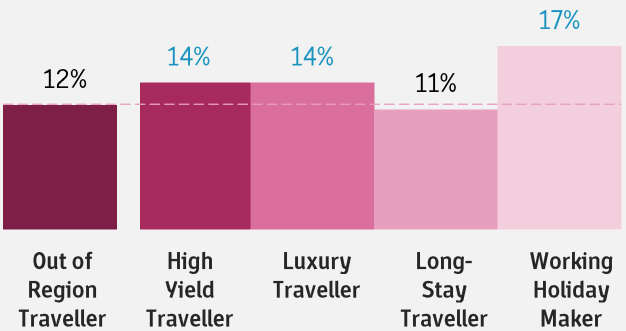
GUIDED TOUR

ADVENTURE • LAND & SKY BASED • 4WD AND OFF-ROADING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Just over 1 in 10 Out of Region Travellers are specifically interested in guided 4WD or off-road tours, with greater interest among higher-yielding segments and particularly Working Holiday Makers
- Markets with a stronger interest in guided 4WD tours include Vietnam, Philippines, New Zealand and France
- Despite below-average interest levels, China and the US remain the top volume opportunities
- This audience skews towards younger families, and is most strongly motivated by exploration needs, with strong interest in Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	12%	13,427
Vietnam	18%	389
Philippines	17%	467
New Zealand	15%	112
France	15%	1,091
Malaysia	14%	240
Italy	14%	434
Hong Kong	13%	157
Taiwan	12%	335
Singapore	12%	180
Thailand	11%	230
Indonesia	11%	144
UK	10%	988
Japan	10%	773
USA	10%	2,541
China	9%	2,715
Canada	9%	565
India	9%	326
Germany	9%	488
South Korea	5%	485
AUSTRALIANS	10%	912

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	36%
	Older Families	16%	17%
AGE	18-29	30%	28%
	30-39	26%	28%
	40-49	22%	24%
	50-64	22%	20%
	Average age	38	38
GENDER	Male	50%	50%
	Female	50%	50%
INCOME	Low	25%	22%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	24%
TRAVELLER MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	17%
	Exploration	17%	21%
	Adventure	14%	13%
	Transformation	13%	13%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	48%
Actively planning to visit Australia		15%	21%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Guided tour (n=2,401)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

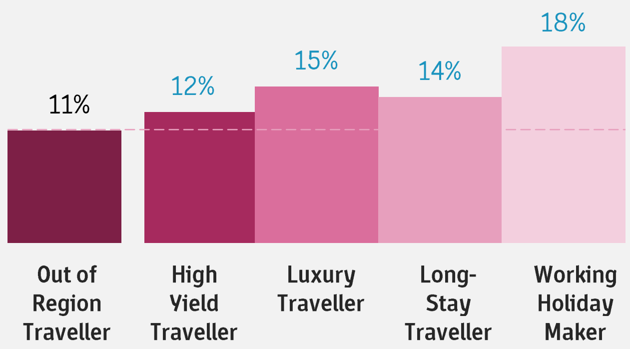
SELF-DRIVE

ADVENTURE • LAND & SKY BASED • 4WD AND OFF-ROADING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 1 in 10 Out of Region Travellers are specifically interested in self-drive 4WD or off-road experiences, with significantly higher interest among key traveller segments
- Malaysia, New Zealand and France have the highest interest, but China and the USA represent the largest volumes of potential travellers
- Those interested in this experience skew younger, higher-income, and heavily towards males
- This audience is more likely to travel to engage in passions or hobbies, and has very strong interest in visiting Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	11%	12,150
Malaysia	14%	225
New Zealand	13%	98
France	13%	932
Philippines	12%	346
Taiwan	12%	333
Hong Kong	12%	150
Singapore	12%	183
Vietnam	12%	252
Canada	11%	694
China	11%	3,180
USA	11%	2,880
UK	10%	959
Japan	10%	765
Germany	10%	543
India	9%	321
Indonesia	8%	111
South Korea	8%	776
Italy	7%	210
Thailand	6%	133
AUSTRALIANS	12%	1,064

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	39%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	34%
	Older Families	16%	14%
AGE	18-29	30%	36%
	30-39	26%	27%
	40-49	22%	20%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	60%
	Female	50%	40%
INCOME	Low	25%	22%
	Middle	28%	27%
	High	24%	27%
	Very high	22%	25%
TRAVELLER MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	17%
	Exploration	17%	17%
	Adventure	14%	15%
	Transformation	13%	13%
	Passion, hobbies	14%	17%
	Restoration	7%	5%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	21%

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Self-drive (n=2,252)

fiftyfive5

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

ADVENTURE

EXPLORATION

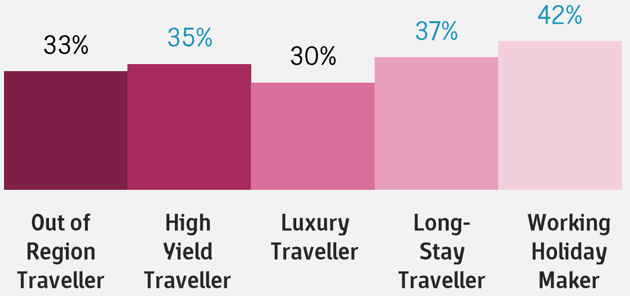
HIKING/WALKING

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall a third of Out of Region Travellers are interested in hiking or walking experiences, with stronger demand from key segments, particularly Working Holiday Makers
- Greater interest among all Western markets, particularly Germany, where nearly half are interested and this experience ranks 3rd in appeal
- Exploration and nature are key travel motivations among those interested in hiking/walking
- Strong cross-sell opportunities with other exploration-based adventure including walking tours, road trips, trekking/camping and cycling

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	19%
	Exploration	17%	20%
	Adventure	14%	14%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	34%	24	41,417
Germany	49%	3	2,738
France	43%	5	3,201
USA	42%	8	11,051
Canada	46%	8	2,874
Italy	48%	9	1,479
UK	37%	19	3,558
New Zealand	38%	23	284
Singapore	33%	26	503
South Korea	33%	30	3,202
Philippines	41%	31	1,133
Japan	27%	32	2,146
India	35%	35	1,272
Malaysia	29%	47	477
Taiwan	26%	52	694
Hong Kong	21%	57	260
China	18%	59	5,282
Indonesia	26%	61	348
Thailand	22%	67	465
Vietnam	21%	75	450
AUSTRALIANS	37%	20	3,286

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Hiking/walking (n=7,535)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

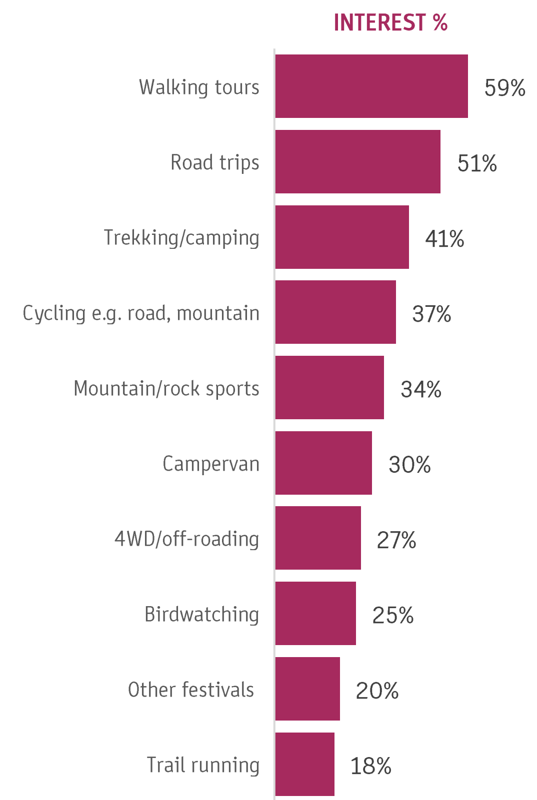
HIKING/WALKING

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	38%
	Older Singles/Couples (45+)	16%	18%
	Young Families	32%	29%
	Older Families	16%	14%
AGE	18-29	30%	31%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	22%
	Average age	38	38
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	24%
	Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Invigorating way to experience nature and the outdoors
- Healthy and refreshing activity i.e., walking and breathing in the fresh air while experiencing beautiful scenery

WHY SOME DO NOT

- Can experience at home, too strenuous and physical for some (those who don't enjoy physical activity or have physical/ endurance limitations)

HERO DESTINATIONS

- Central/ South America e.g. Mexico, Brazil, Peru • Oregon, California, Washington, Hawaii • Chile • Australia • New Zealand
- Mountainous hiking in Japan, Nepal, Sri Lanka
- Thailand, Canada, Sweden, Switzerland

"I take pleasure in a saunter in the woods that has beautiful scenery and is away from the hustle and bustle of city life. I like to experience the peacefulness and solitude that getting out and away from it all on foot provides

HIGH YIELD TRAVELLER, UNITED STATES

In hiking and trekking you experience true nature and also test your physical fitness. It gives you a different feeling when you complete a trek as it's not only reaching the destination but also exploring a lot of unexplored places and beauties on the way.

HIGH YIELD TRAVELLER, INDIA"

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Hiking/walking (n=7,535)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

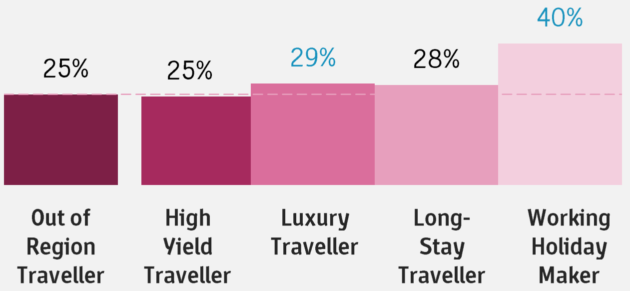
CYCLING

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, a quarter of Out of Region Travellers are interested in cycling experiences
- Those interested in cycling tend to be younger, particularly young families, with a skew towards males
- This audience has higher consideration of Australia and is more likely to be motivated by nature and adventure as reasons to travel
- Within cycling, road biking attracts stronger appeal than mountain biking, with some travellers interested in both
- Strong cross-sell opportunities with other active experiences and hobbies like fishing and golf

INTEREST IN THE EXPERIENCE BY SEGMENT

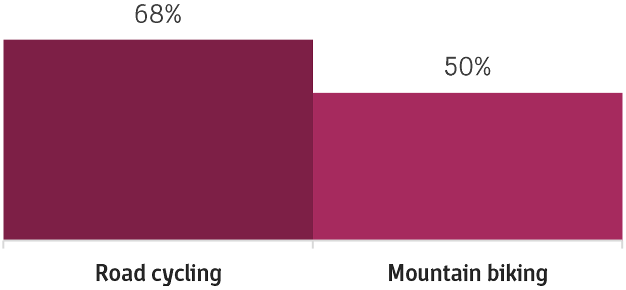


TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	19%
	Exploration	17%	17%
	Adventure	14%	16%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	25%	54	29,519
Germany	37%	17	2,094
Indonesia	41%	21	556
China	26%	27	7,601
India	35%	33	1,276
Thailand	34%	35	710
Japan	23%	36	1,837
Malaysia	30%	43	502
Vietnam	31%	46	656
Taiwan	28%	47	759
UK	22%	53	2,159
Singapore	23%	54	358
Canada	22%	55	1,344
USA	20%	61	5,377
South Korea	18%	63	1,717
Italy	17%	67	515
Philippines	27%	69	747
New Zealand	20%	70	149
Hong Kong	17%	72	206
France	13%	74	956
AUSTRALIANS	16%	78	1,401

INTEREST IN SUB-EXPERIENCES



fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Cycling e.g. road, mountain (n=5,634)

Significantly higher than those not interested
Significantly lower than those not interested

TOURISM AUSTRALIA

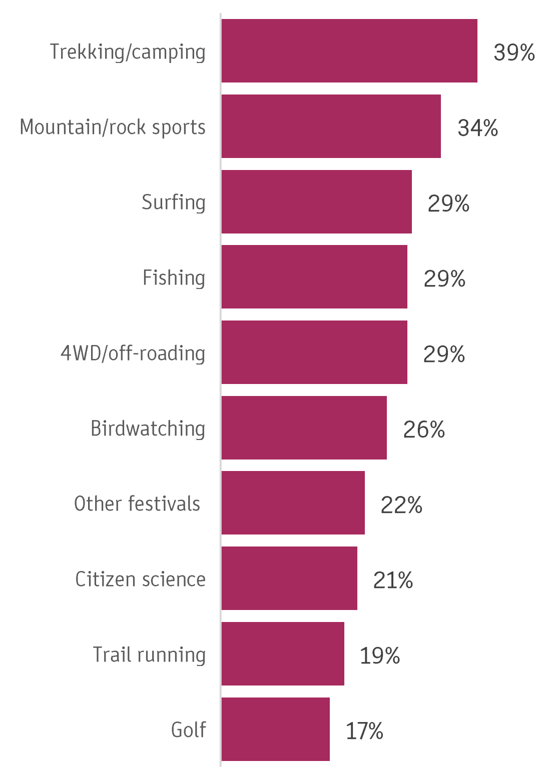
CYCLING

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	36%
	Older Families	16%	16%
AGE	18-29	30%	34%
	30-39	26%	28%
	40-49	22%	21%
	50-64	22%	18%
	Average age	38	37
GENDER	Male	50%	56%
	Female	50%	44%
INCOME	Low	25%	25%
	Middle	28%	27%
	High	24%	24%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Passionate about cycling
- Good way to get around a specific destination
- Enjoy holidays that are active

WHY SOME DO NOT

- Do not enjoy cycling or being physically active while on holiday or consider it too strenuous

HERO DESTINATIONS

- France • Budapest • Hungary

My fitness levels aren't up to more than a couple of hours on a bike and I wouldn't want to exercise every day, especially on a mission to get from one place to another.

HIGH YIELD TRAVELLER, NEW ZEALAND

I have tried bike tours and it was an exciting way of touring the city. I am an active person.

HIGH YIELD TRAVELLER, SINGAPORE

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Cycling e.g. road, mountain (n=5,634)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

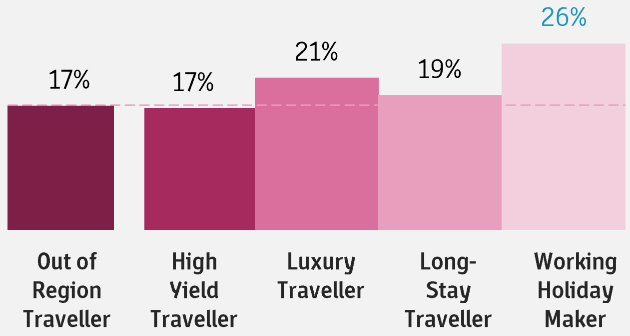
ROAD CYCLING

ADVENTURE • EXPLORATION • CYCLING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 17% of Out of Region Travellers are interested in road cycling when they travel, with strongest interest from Working Holiday Makers
- Interest in road cycling is highest in Germany, followed by a number of Eastern markets
- Those interested in road cycling are more likely to be male, with above-average interest in visiting Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	17%	16,502
Germany	27%	922
Taiwan	26%	577
India	24%	577
Indonesia	23%	183
Vietnam	20%	309
China	20%	4,093
Thailand	19%	252
Malaysia	19%	218
Japan	18%	1,001
Philippines	18%	409
Singapore	17%	219
South Korea	15%	1,413
Canada	15%	776
UK	15%	1,242
USA	13%	3,203
Hong Kong	12%	155
New Zealand	11%	85
Italy	9%	272
France	8%	598
AUSTRALIANS	9%	813

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	15%
	Young Families	32%	34%
	Older Families	16%	16%
AGE	18-29	30%	32%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	20%
	Average age	38	37
GENDER	Male	50%	56%
	Female	50%	44%
INCOME	Low	25%	24%
	Middle	28%	30%
	High	24%	23%
	Very high	22%	22%
TRAVELLER MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	19%
	Exploration	17%	16%
	Adventure	14%	15%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	41%
Actively planning to visit Australia		15%	17%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Road cycling (n=3,022)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

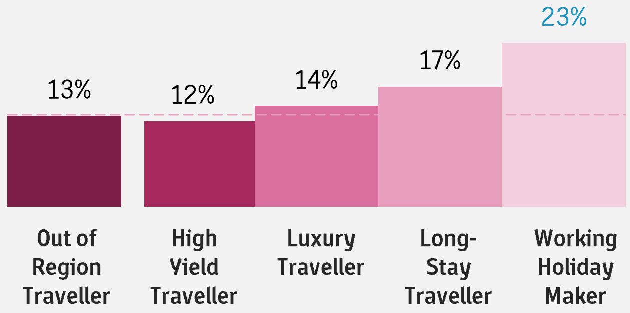
MOUNTAIN BIKING

ADVENTURE • EXPLORATION • CYCLING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 13% Out of Region Travellers are interested in mountain biking travel experiences
- Interest varies widely by market, ranging from just 4% of those in South Korea to 26% of Indonesian travellers
- Those interested in road cycling are markedly more likely to be male and younger (predominantly 18-29)
- This audience has higher than average consideration and intention to visit Australia and is more likely to be motivated to travel for adventure and nature needs

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	13%	11,568
Indonesia	26%	206
Thailand	22%	283
Philippines	19%	436
India	18%	430
Vietnam	16%	242
Germany	16%	536
Malaysia	16%	184
USA	12%	3,135
New Zealand	12%	89
UK	12%	999
China	12%	2,388
Italy	12%	349
Canada	11%	567
Singapore	11%	139
Japan	9%	494
Hong Kong	7%	88
France	7%	490
Taiwan	5%	104
South Korea	4%	409
AUSTRALIANS	10%	856

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	39%
	Older Families	16%	15%
AGE	18-29	30%	35%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	16%
	Average age	38	36
GENDER	Male	50%	62%
	Female	50%	38%
INCOME	Low	25%	24%
	Middle	28%	26%
	High	24%	25%
	Very high	22%	25%
TRAVELLER MOTIVATIONS	Reconnection	17%	13%
	Into Nature	17%	19%
	Exploration	17%	15%
	Adventure	14%	19%
	Transformation	13%	15%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	19%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Mountain biking (n=2,226)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

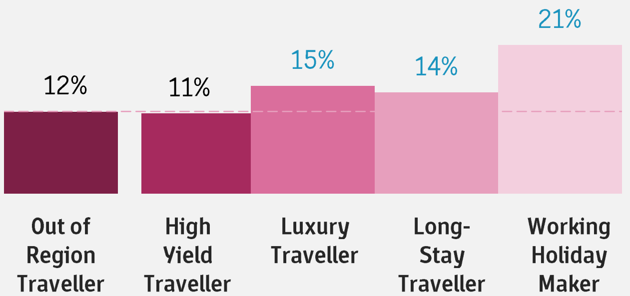
TRAIL RUNNING

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Just over 1 in 10 are interested in trail running, with significantly greater interest among Luxury Travellers, Long-Stay Travellers and particularly Working Holiday Makers
- Trail running is a more niche experience, ranking towards the bottom of the 89 experiences tested across markets (maximum rank of 75th in Hong Kong)
- Those interested in trail running skew younger, male, and tend to be motivated by adventure of transformation when they travel
- Cross-sell opportunities include surfing, fishing, bird watching and short courses or workshops

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	12%
	Into Nature	17%	18%
	Exploration	17%	14%
	Adventure	14%	20%
	Transformation	13%	18%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	12%	88	14,400
Hong Kong	16%	75	197
Canada	15%	77	939
South Korea	11%	80	1,094
India	18%	81	668
Philippines	19%	83	521
USA	14%	84	3,675
Singapore	12%	85	192
Italy	11%	85	330
France	8%	86	572
UK	12%	86	1,133
Malaysia	11%	87	179
New Zealand	11%	88	79
China	11%	88	3,158
Indonesia	10%	88	131
Japan	6%	88	501
Germany	6%	88	363
Taiwan	7%	88	195
Vietnam	14%	89	296
Thailand	8%	89	178
AUSTRALIANS	10%	87	913

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Trail running (n=2,619)

Significantly higher than those not interested   *Significantly lower than those not interested*

fiftyfive5   TOURISM AUSTRALIA

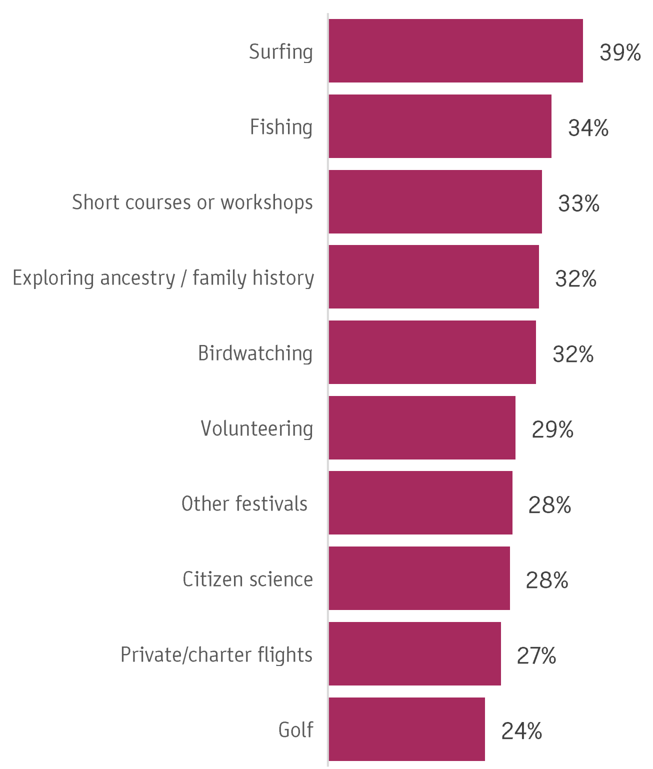
TRAIL RUNNING

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	39%
	Older Families	16%	14%
AGE	18-29	30%	36%
	30-39	26%	28%
	40-49	22%	21%
	50-64	22%	16%
	Average age	38	36
GENDER	Male	50%	57%
	Female	50%	43%
INCOME	Low	25%	22%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Trail running (n=2,619)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

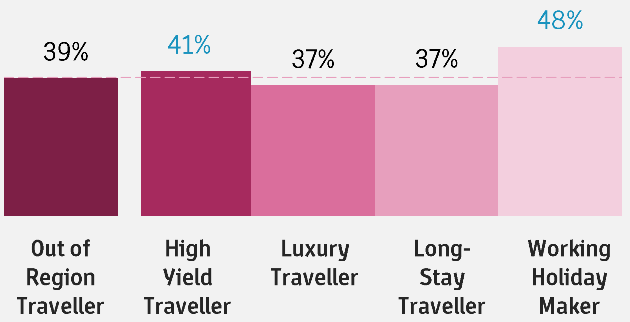
WALKING TOURS

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Around 2 in 5 Out of Region Travellers and almost half of Working Holiday Makers are interested in walking tours
- The French market shows particularly strong inclination towards this experience, with walking tours the second most popular experience
- Key travel motivations for those interested in walking tours include exploration and getting into nature
- Cross-sell opportunities include hiking/walking, road trips, Indigenous experiences, ecotourism and trekking or camping

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	20%
	Exploration	17%	20%
	Adventure	14%	13%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	42%
Actively planning to visit Australia		15%	17%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Walking tours (n=8,451)

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	39%	16	46,019
France	55%	2	4,094
Thailand	57%	4	1,208
Canada	50%	5	3,080
Singapore	43%	10	661
Philippines	52%	13	1,462
Taiwan	48%	13	1,310
Germany	38%	14	2,129
USA	39%	16	10,423
UK	37%	18	3,567
Italy	37%	20	1,153
China	30%	21	8,478
New Zealand	36%	25	271
Malaysia	36%	28	593
Vietnam	37%	28	788
South Korea	34%	28	3,365
Indonesia	34%	40	465
India	34%	40	1,244
Japan	19%	48	1,477
Hong Kong	20%	60	251
AUSTRALIANS	39%	15	3,449

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

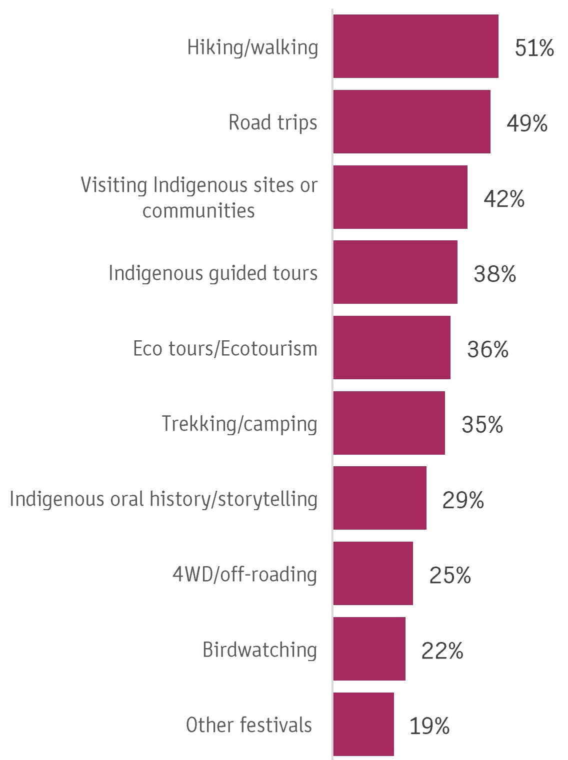
WALKING TOURS

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	18%
	Young Families	32%	30%
	Older Families	16%	16%
AGE	18-29	30%	29%
	30-39	26%	25%
	40-49	22%	22%
	50-64	22%	23%
	Average age	38	39
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Enjoy walking for wellness
- Great way to explore a place and get to know it
- Time filler in-between other experiences

WHY SOME DO NOT

- Depends on the mood and destination

HERO DESTINATIONS

Anywhere

I am also very interested in walking tours - it is an efficient way to explore the city. I can gain more knowledge about the place through the tour guide. I can also make new friends.

HIGH YIELD TRAVELLER, SINGAPORE

Walking is a great form of exercise and taking a tour to learn interesting facts is always a special activity.

HIGH YIELD TRAVELLER, UNITED STATES

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Walking tours (n=8,451)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

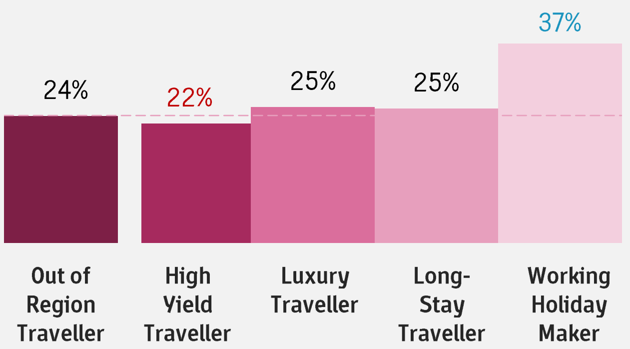
TREKKING/CAMPING

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Approximately a quarter of Out of Region Travellers are interested in trekking or camping, with greatest interest among Working Holiday Makers
- Those interested in trekking/camping skew younger and are more inclined to seek nature and adventure as key travel motivations
- Cross-sell opportunities include forms of comfort camping (campervan and glamping), as well as other adventure activities including hiking/walking, mountain/rock sports and extreme sports

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	20%
	Exploration	17%	18%
	Adventure	14%	16%
	Transformation	13%	13%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	24%	58	26,522
France	25%	32	1,889
Philippines	39%	36	1,082
South Korea	25%	41	2,480
India	34%	41	1,233
Vietnam	31%	45	661
Thailand	29%	47	611
New Zealand	25%	54	190
Taiwan	25%	54	664
Italy	21%	55	642
Japan	17%	56	1,342
Indonesia	26%	59	360
Germany	19%	59	1,049
Singapore	22%	59	337
Malaysia	25%	61	411
China	18%	61	5,191
Canada	20%	61	1,243
UK	19%	63	1,823
USA	19%	64	5,141
Hong Kong	14%	80	173
AUSTRALIANS	21%	58	1,870

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Trekking/camping (n=5,237)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

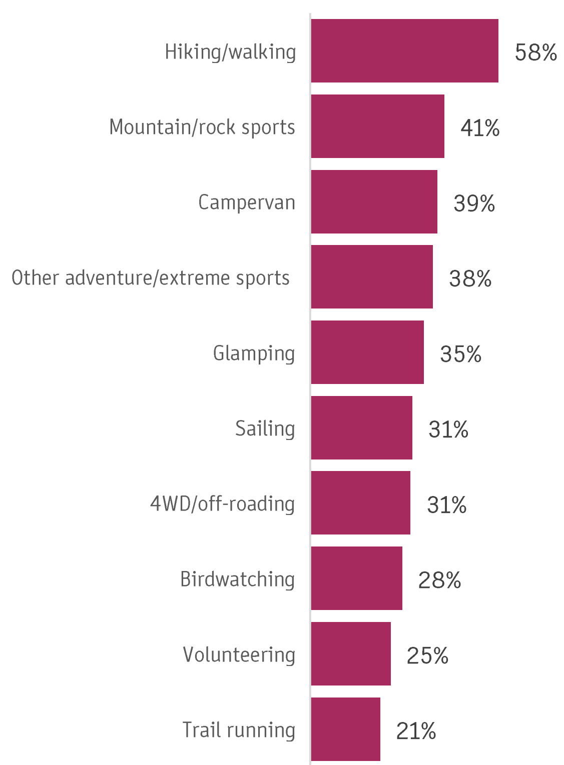
TREKKING/CAMPING

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	39%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	34%
	Older Families	16%	15%
AGE	18-29	30%	35%
	30-39	26%	28%
	40-49	22%	21%
	50-64	22%	16%
	Average age	38	36
GENDER	Male	50%	51%
	Female	50%	49%
INCOME	Low	25%	25%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Enjoy being outdoors and immersing in nature
- Trekking is a natural extension of being on holiday and exploring nature
- Bonding experience for friends and family

WHY SOME DO NOT

- Living in the wilderness can be uncomfortable without amenities
- Do not enjoy strenuous / physical activity on holiday

HERO DESTINATIONS

- Destinations known for its nature, wilderness, and/or famous hiking trails
- Australia and New Zealand
- Central/South American destinations such as Mexico, Brazil, Peru

I enjoy the process of camping including setting up the tent, making a campfire and cooking outdoors for myself

HIGH YIELD TRAVELLER, UNITED STATES

Walking through nature and breathing clean air helps me to relax and de-stress. It also allows me to explore beautiful and scenic places at my own pace. I love exploring the wilderness and natural landscapes, hence anywhere that there's an opportunity to hike or explore mountains, I would be 100% up for it!. Just love the challenge, scenic overview and sense of achievement reaching the target point

HIGH YIELD TRAVELLER, SINGAPORE

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Trekking/camping (n=5,237)

Significantly higher than those not interested (blue) · *Significantly lower than those not interested* (red)

TOURISM AUSTRALIA

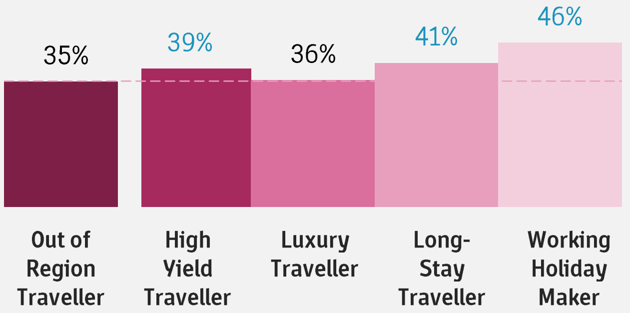
ROAD TRIPS

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- More than a third of Out of Region Travellers are interested in road trips, with greater interest among key segments
- Canada, India and New Zealand, as well as Australia, show particularly strong interest in road trips
- Those interested in road trips tend to be motivated by exploration when they travel
- Cross-sell opportunities include a range of other soft adventure activities including hiking/walking, trekking/camping, rail journeys and campervan

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	18%
	Exploration	17%	20%
	Adventure	14%	14%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	36%	22	40,198
Canada	48%	6	2,995
India	50%	7	1,842
New Zealand	50%	7	372
USA	41%	9	10,901
UK	41%	12	3,929
Singapore	40%	13	622
Thailand	46%	13	975
Italy	37%	21	1,144
Philippines	46%	21	1,271
Germany	34%	22	1,930
France	29%	24	2,158
South Korea	34%	27	3,369
Malaysia	33%	37	541
Indonesia	35%	38	478
Taiwan	30%	42	812
Japan	17%	54	1,348
China	17%	64	4,776
Hong Kong	19%	67	235
Vietnam	23%	72	499
AUSTRALIANS	49%	5	4,258

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Road trips (n=7,909)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

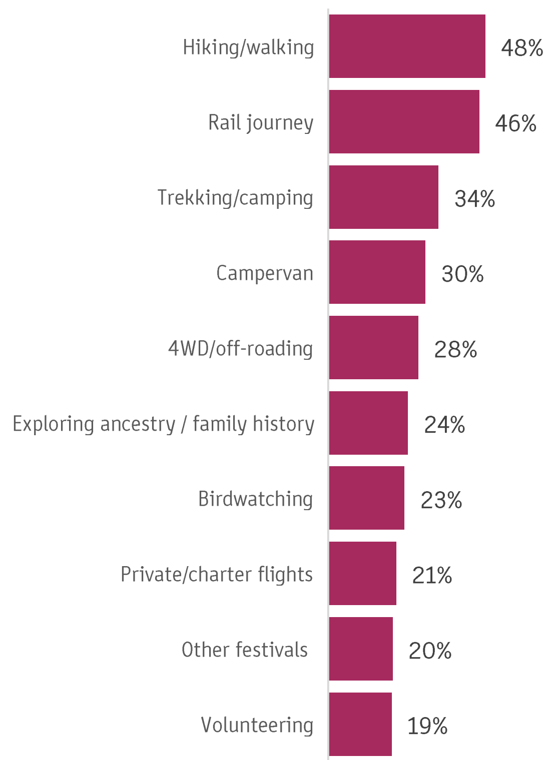
ROAD TRIPS

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	31%
	Older Families	16%	16%
AGE	18-29	30%	31%
	30-39	26%	25%
	40-49	22%	21%
	50-64	22%	23%
	Average age	38	38
GENDER	Male	50%	50%
	Female	50%	50%
INCOME	Low	25%	24%
	Middle	28%	27%
	High	24%	24%
	Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Increased appeal during COVID-19
• Sense of freedom, adventure and discovery
• Spontaneous and flexible way to travel and visit a range of places, diverse activities, and sample attractions at your own pace

WHY SOME DO NOT

• Do not enjoy driving or being in a car i.e., perceived as tiring and cumbersome
• Requires logistical preparation, especially if overseas e.g., renting a car

HERO DESTINATIONS

• Domestic destinations
• Destinations where road trips are part of the culture and a popular way to enjoy the destination e.g., scenic drives, diversity in landscape, large distances between attractions, etc.
• USA e.g., Grand Canyon area
• New Zealand and Australia

I enjoy driving and you can go at your own pace when you drive instead of relying on buses or planes for transportation

HIGH YIELD TRAVELLER, UNITED STATES

Road trip is a great experience, you tend to see so many beautiful things while driving to the destination. In road trip, it becomes more about the journey and less about the destination and this is beautiful.

HIGH YIELD TRAVELLER, INDIA

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Road trips (n=7,909)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

ADVENTURE

COMFORT CAMPING

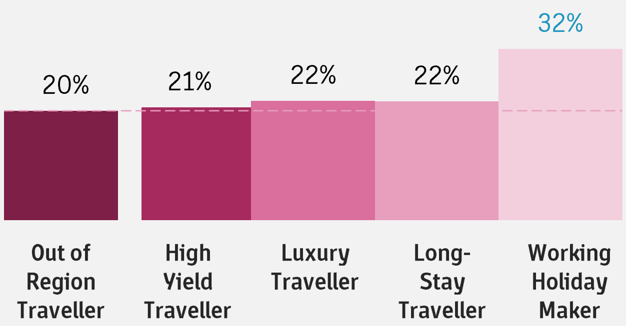
CAMPERVAN

ADVENTURE • COMFORT CAMPING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall 1 in 5 Out of Region Travellers are interested in campervan experiences when they travel, with significantly greater interest among the Working Holiday Maker segment
- Those interested in campervanning skew younger and towards female travellers
- Australia features strongly in the holiday consideration and intention set among those interested in campervan experiences
- Cross-sell and itinerary packaging opportunities include other overnight adventure (trekking/camping and glamping) and water sports

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	18%
	Exploration	17%	18%
	Adventure	14%	14%
	Transformation	13%	13%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	20%	67	21,793
Hong Kong	28%	37	348
Germany	22%	46	1,248
Malaysia	28%	50	460
Taiwan	26%	51	699
New Zealand	25%	53	190
UK	21%	57	1,987
China	19%	58	5,506
South Korea	18%	61	1,806
Singapore	21%	63	323
Italy	18%	64	557
Thailand	22%	65	470
Philippines	27%	68	757
Vietnam	25%	68	542
Japan	13%	71	1,004
France	12%	75	904
Indonesia	18%	76	247
Canada	15%	78	927
India	18%	82	664
USA	12%	87	3,154
AUSTRALIANS	18%	67	1,601

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Campervan (n=4,477)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

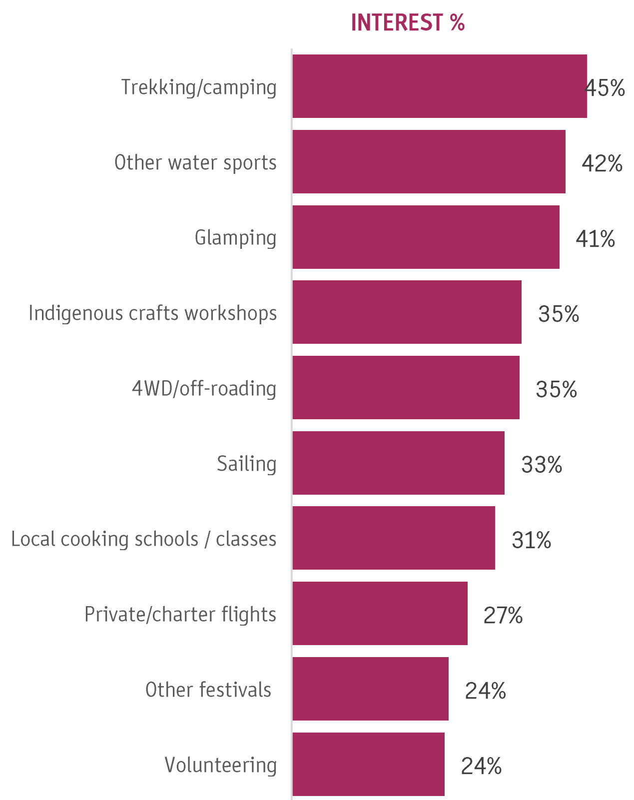
CAMPERVAN

ADVENTURE • COMFORT CAMPING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	33%
	Older Families	16%	16%
AGE	18-29	30%	32%
	30-39	26%	28%
	40-49	22%	21%
	50-64	22%	19%
	Average age	38	37
GENDER	Male	50%	44%
	Female	50%	56%
INCOME	Low	25%	26%
	Middle	28%	27%
	High	24%	24%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Domestic travel experience possible by car
- Experience the great outdoors comfortably
- Bonding experience for family and friends

WHY SOME DO NOT

- Unrealistic for packing gear overseas
- Uncomfortable experience for those that want more space and amenities

HERO DESTINATIONS

- Domestic/regional travel
- Destinations with nature adventure e.g., New Zealand, US

> *I always wanted a "cross-border adventure" while I am still able-bodied, like taking a train from China to Russia, or take a Caravan trip in New Zealand or Australia.*
> *HIGH YIELD TRAVELLER, SINGAPORE*

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Campervan (n=4,477)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

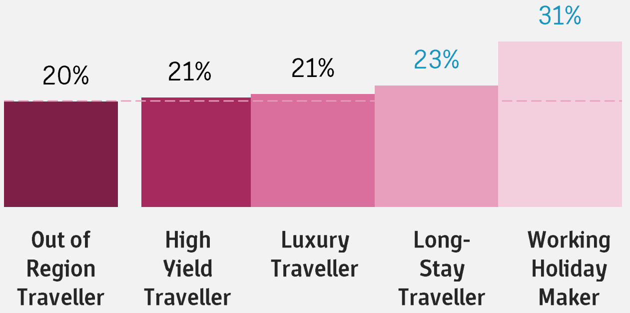
GLAMPING

ADVENTURE • COMFORT CAMPING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, one in five Out of Region Travellers are interested in glamping, with stronger interest among longer-stay audiences
- Glamping is of highest interest to the New Zealand market, while Japan balances above-average interest with a larger potential market size
- Those interested in glamping skew younger (particularly 18-39) and heavily female
- This audience has higher consideration and intention for Australia
- Strong cross-sell opportunities with adventure-based activities, most prominently other overnight experiences (campervan and trekking)

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	16%
	Exploration	17%	17%
	Adventure	14%	15%
	Transformation	13%	14%
	Passion, hobbies	14%	15%
	Restoration	7%	7%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	20%	69	22,516
New Zealand	32%	34	239
Japan	23%	37	1,789
Hong Kong	24%	50	297
South Korea	21%	52	2,091
UK	22%	55	2,093
Malaysia	25%	60	420
Taiwan	23%	60	610
Germany	18%	62	1,005
Vietnam	26%	67	547
China	16%	69	4,669
Italy	16%	71	481
France	13%	71	966
Thailand	22%	71	456
Canada	17%	72	1,027
USA	17%	73	4,373
Singapore	18%	74	277
Indonesia	15%	82	210
Philippines	17%	88	478
India	13%	89	487
AUSTRALIANS	24%	54	2,097

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Glamping (n=4,418)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

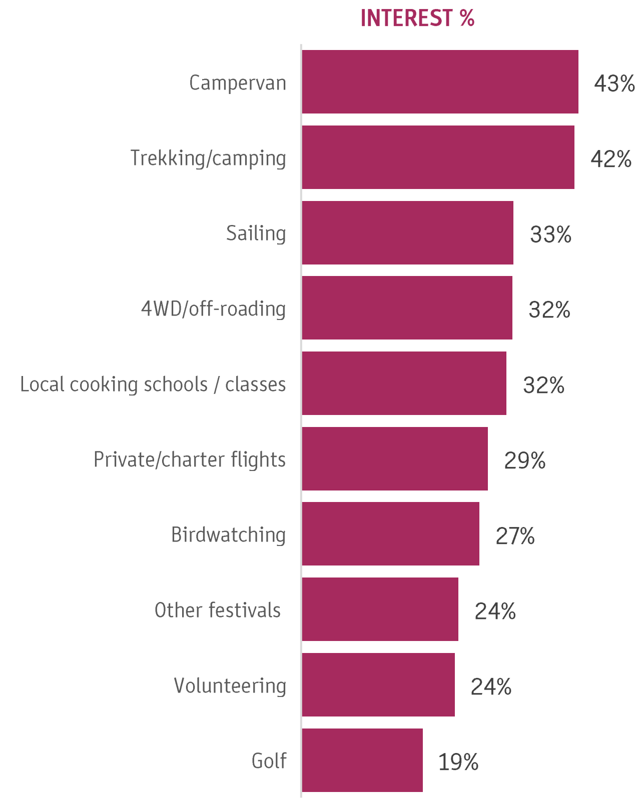
GLAMPING

ADVENTURE • COMFORT CAMPING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	40%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	34%
	Older Families	16%	14%
AGE	18-29	30%	36%
	30-39	26%	27%
	40-49	22%	21%
	50-64	22%	16%
	Average age	38	36
GENDER	Male	50%	42%
	Female	50%	58%
INCOME	Low	25%	24%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Domestic travel experience possible by car
- Experience the great outdoors comfortably
- Greater amenities than camping makes it easy

WHY SOME DO NOT

- Perceive it to be less enjoyable without amenities
- Difficult to pack gear when travelling overseas

HERO DESTINATIONS

- Domestic/regional travel
- Destinations with nature adventure e.g., New Zealand, US

Glamping is a fantastic way to feel free in the outdoors without doing it rough

HIGH YIELD TRAVELLER, NEW ZEALAND

I do not like camping or glamping as I hate insects or sharing of a bathroom with everyone at the campsite

HIGH YIELD TRAVELLER, SINGAPORE

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Glamping (n=4,418)

● Significantly higher than those not interested

● Significantly lower than those not interested

TOURISM AUSTRALIA

ADVENTURE

JOURNEYS

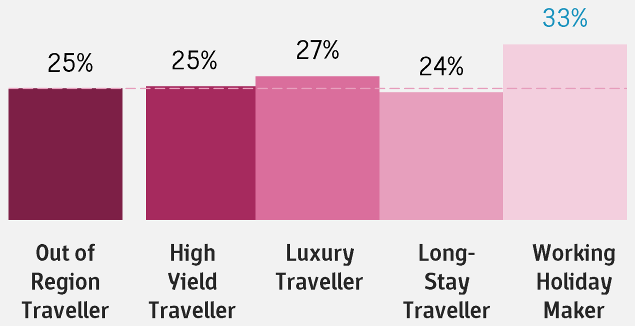
COACH TRAVEL/TOURS

ADVENTURE • JOURNEYS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- A quarter of Out of Region Travellers and a third of Working Holiday Makers are interested in coach travel or tours
- Appeal is stronger in several Eastern markets
- Those interested in coach travel or tours tend to skew slightly older and female
- This audience has above average consideration and intention to visit Australia for leisure
- Cross-sell and itinerary packaging opportunities include rail journeys, eco tours and a range of Indigenous experiences

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	13%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	7%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	25%	55	26,056
Indonesia	41%	18	561
Philippines	44%	22	1,233
Taiwan	35%	32	946
South Korea	31%	32	3,001
Japan	25%	35	1,935
Malaysia	29%	46	478
Vietnam	30%	47	647
Singapore	25%	47	382
UK	22%	56	2,092
Hong Kong	20%	58	255
Thailand	24%	59	501
Italy	19%	59	603
China	17%	63	4,814
Canada	19%	64	1,177
USA	18%	68	4,797
Germany	16%	68	894
New Zealand	20%	68	151
India	25%	70	926
France	9%	84	662
AUSTRALIANS	21%	57	1,876

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Coach travel/tours (n=5,295)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

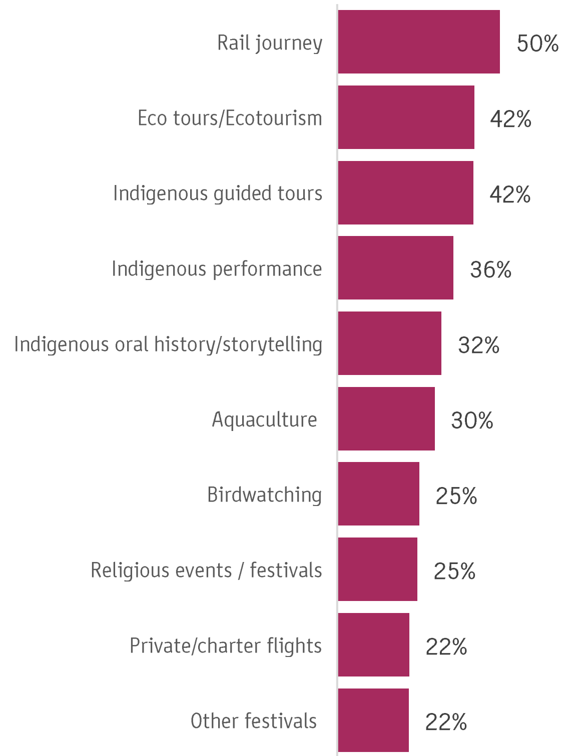
COACH TRAVEL/TOURS

ADVENTURE • JOURNEYS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	33%
	Older Singles/Couples (45+)	16%	18%
	Young Families	32%	32%
	Older Families	16%	17%
AGE	18-29	30%	28%
	30-39	26%	25%
	40-49	22%	22%
	50-64	22%	26%
	Average age	38	39
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Coach travel/tours (n=5,295)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

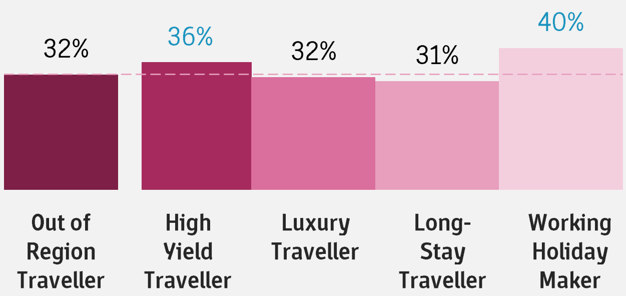
RAIL JOURNEY

ADVENTURE • JOURNEYS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Around a third of Out of Region Travellers are interested in rail journeys, with greater interest from High Yield Travellers and Working Holiday Makers
- Several Eastern markets, and New Zealand, have above-average interest in rail journeys
- Exploration is the key travel motivation among those interested in rail journeys
- Those interested in rail journeys tend to be older (50-64)
- Diverse cross-sell or packaging opportunities include seasonal natural events, coach travel, performing arts, war history and winery stays

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	18%
	Exploration	17%	21%
	Adventure	14%	13%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	32%	28	34,241
Malaysia	49%	7	812
Taiwan	55%	9	1,482
Japan	35%	16	2,788
New Zealand	39%	20	291
South Korea	36%	21	3,497
India	38%	21	1,399
Indonesia	40%	24	539
UK	33%	26	3,145
Hong Kong	34%	27	423
Singapore	30%	31	462
Canada	30%	32	1,835
Italy	29%	37	913
Germany	25%	40	1,400
Thailand	31%	41	659
France	23%	42	1,671
USA	25%	49	6,488
China	18%	60	5,262
Philippines	29%	60	811
Vietnam	17%	85	364
AUSTRALIANS	35%	26	3,044

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Rail journey (n=7,181)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

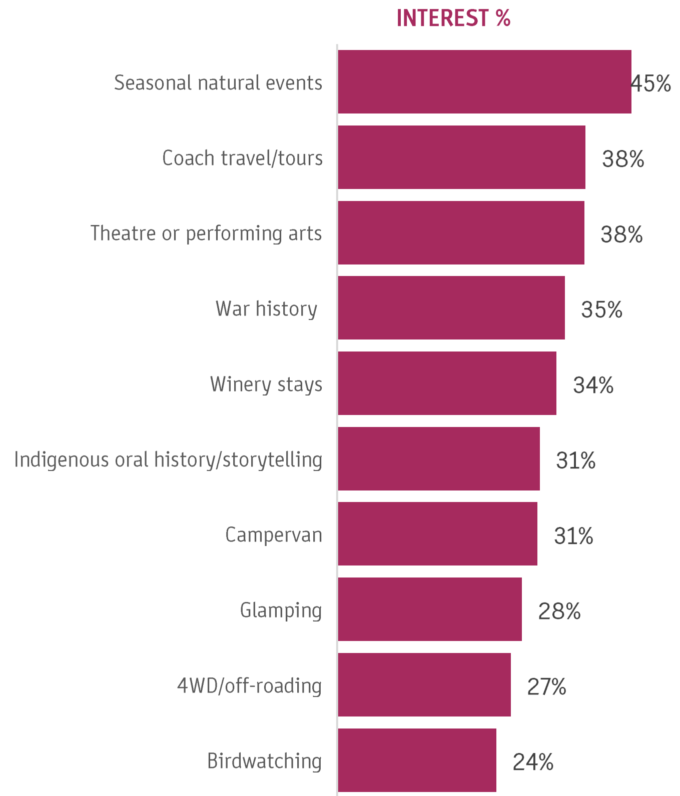
RAIL JOURNEY

ADVENTURE • JOURNEYS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	21%
	Young Families	32%	27%
	Older Families	16%	16%
AGE	18-29	30%	27%
	30-39	26%	24%
	40-49	22%	23%
	50-64	22%	27%
	Average age	38	40
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	25%
	Middle	28%	28%
	High	24%	23%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Rail journey (n=7,181)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

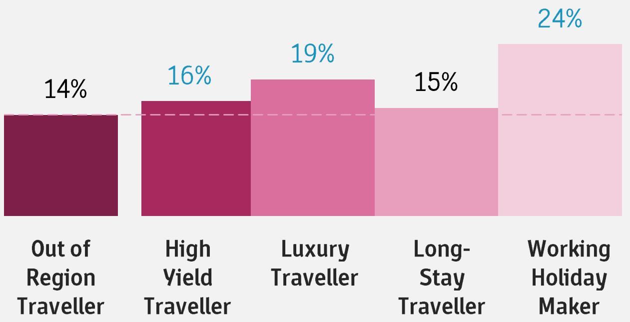
PRIVATE/CHARTER FLIGHTS

ADVENTURE • JOURNEYS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall 14% are interested in private/charter flights, with greater interest among higher-yielding segments ang Working Holiday Makers
- At a market level, Italy, New Zealand and India have the highest interest levels, with this interest ranking most highly (66th) for Italians
- Those interested in private or charter flights skew younger (18-29) with higher incomes
- This audience is most likely to seek exploration, transformation or passions/hobbies when they travel, and have strong interest in visiting Australia for a future holiday
- Cross-sell opportunities include extreme sports, comfort camping (campervan or glamping), sailing and 4WD/off-roading

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	14%
	Exploration	17%	19%
	Adventure	14%	15%
	Transformation	13%	16%
	Passion, hobbies	14%	15%
	Restoration	7%	6%
Consideration of Australia		37%	48%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	14%	83	15,868
Italy	18%	66	545
Germany	15%	72	829
France	12%	76	876
New Zealand	18%	78	133
UK	15%	78	1,445
South Korea	12%	79	1,190
Taiwan	12%	81	333
Hong Kong	13%	81	162
Canada	14%	82	882
Singapore	14%	83	213
India	18%	83	661
Malaysia	16%	83	272
Indonesia	15%	84	208
Thailand	13%	84	265
USA	13%	85	3,517
Vietnam	16%	86	350
Japan	8%	86	643
Philippines	17%	87	482
China	10%	89	2,862
AUSTRALIANS	15%	80	1,338

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Private/charter flights (n=3,176)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

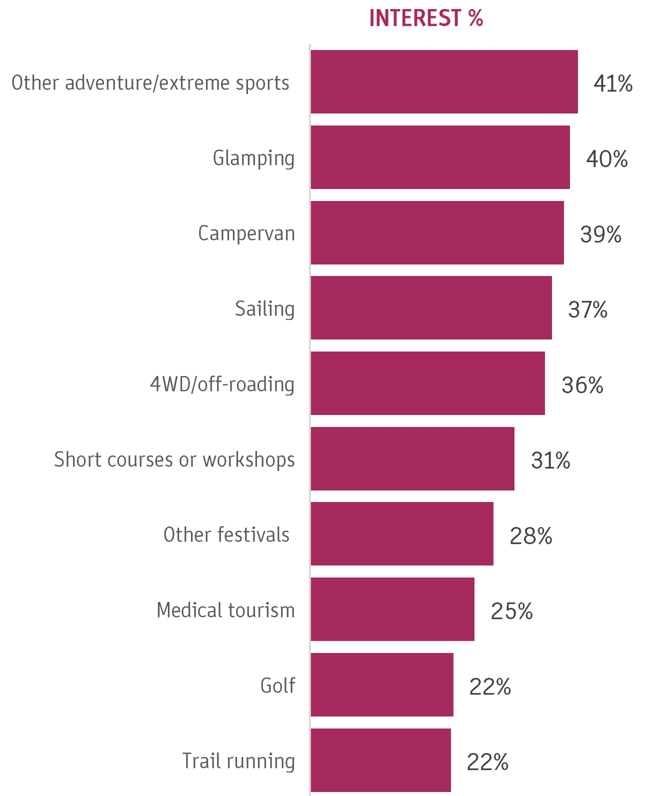
PRIVATE/CHARTER FLIGHTS

ADVENTURE • JOURNEYS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	38%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	34%
	Older Families	16%	15%
AGE	18-29	30%	35%
	30-39	26%	26%
	40-49	22%	21%
	50-64	22%	18%
	Average age	38	36
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	21%
	Middle	28%	26%
	High	24%	26%
	Very high	22%	27%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Private/charter flights (n=3,176)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

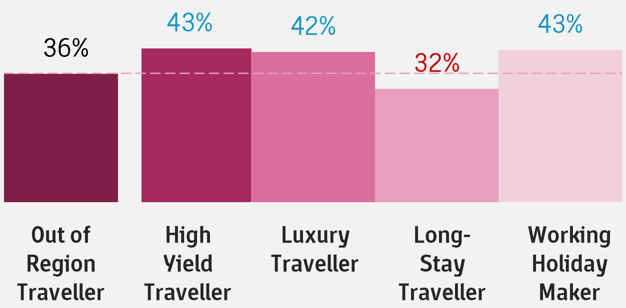
CRUISING OCEANS, RIVERS OR LAKES

ADVENTURE • JOURNEYS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, more than a third of Out of Region Travellers are interested cruising oceans, rivers or lakes, with stronger interest among High Yield and Luxury Travellers and Working Holiday Makers
- Canada and South Korea show strong interest in cruising, but US and China represent largest volume opportunities
- Large vessel/ship cruising attracts considerably higher interest than small vessel/boat cruise experiences
- Those interested in cruising tend to be older, with a skew towards females, and have strong consideration for Australia
- Cross-sell opportunities include experiences featuring marine wildlife, and air and water adventure activities

INTEREST IN THE EXPERIENCE BY SEGMENT

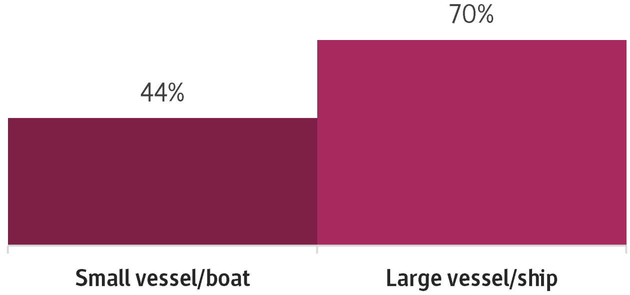


	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	17%
	Exploration	17%	20%
	Adventure	14%	12%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	7%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	36%	20	44,011
Canada	41%	14	2,531
South Korea	44%	15	4,277
New Zealand	41%	16	304
Vietnam	43%	16	927
Singapore	38%	16	595
China	32%	18	9,198
Italy	41%	18	1,266
USA	37%	18	9,903
India	39%	19	1,446
UK	35%	22	3,373
Japan	31%	23	2,413
Indonesia	38%	26	519
Hong Kong	32%	28	398
Taiwan	39%	29	1,042
France	26%	31	1,896
Germany	30%	31	1,712
Malaysia	35%	33	575
Philippines	35%	43	987
Thailand	31%	44	648
AUSTRALIANS	39%	16	3,391

INTEREST IN SUB-EXPERIENCES



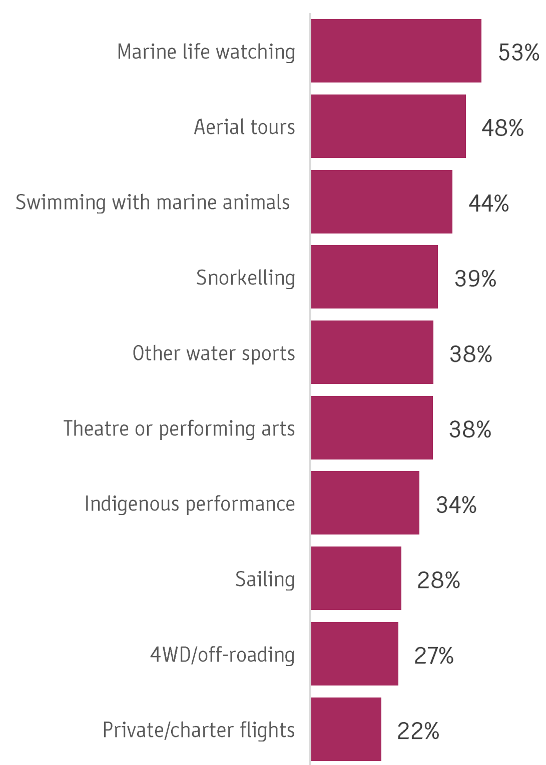
CRUISING OCEANS, RIVERS OR LAKES

ADVENTURE • JOURNEYS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	18%
	Young Families	32%	32%
	Older Families	16%	17%
AGE	18-29	30%	28%
	30-39	26%	25%
	40-49	22%	23%
	50-64	22%	24%
	Average age	38	39
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Luxuries aboard e.g., good food, entertainment, and activities for kids
• Ability to hop on/off for day trips
• Stress-free way to visit multiple destinations

WHY SOME DO NOT

• Do not enjoy large crowds
• Fear of COVID and getting stuck on the cruise
• Prefer to have more freedom of where to stop and go

HERO DESTINATIONS

• Destinations with beautiful weather, unique environment, and variety in terrain
• Australia, Hawaii, the Caribbean, Thailand, Europe

Not fun. I have done them in the past when I was younger (teens). They work well for that and bigger family trips but the idea of wasted days at sea and then just short, quick-hit stops at islands, is not fun anymore. They feel rushed, sales pitches onboard to do quick trips while docked, waaaayyy too many people and we know how gross people can be now thanks to Covid. I don't see myself on a cruise soon.
HIGH YIELD TRAVELLER, UNITED STATES

Swimming, casinos, making new friends and shopping makes this cruise even more exciting. Enjoying every bit of it. Me and my husband watching sea while holding hands day and night is my favourite time-pass.

HIGH YIELD TRAVELLER, INDIA

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Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Cruising oceans, rivers or lakes (n=8,035)

● *Significantly higher than those not interested* (blue: 18%, 24%, 39%, 54%)

● *Significantly lower than those not interested* (red: 34%, 28%, 46%, 23%)

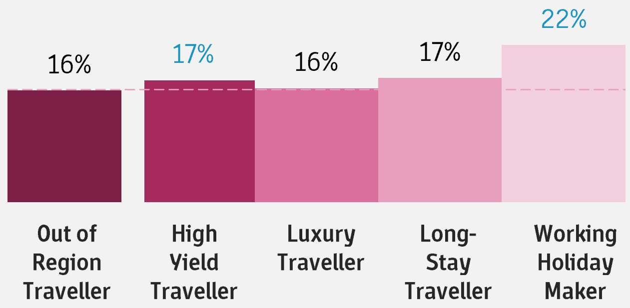
SMALL VESSEL/BOAT

ADVENTURE • JOURNEYS • CRUISING OCEANS, RIVERS OR LAKES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 16% of Out of Region Travellers are interested in small vessel/boat cruising
- Interest levels vary by market, but the USA represents the largest market potential (16% interested, representing a pool of more than 4 million potential travellers)
- Exploration is the primary travel motivation among this audience

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	16%	19,160
Vietnam	21%	448
Philippines	20%	572
Malaysia	19%	322
New Zealand	18%	137
Canada	18%	1,102
India	18%	653
Indonesia	18%	240
UK	16%	1,562
USA	16%	4,252
Germany	15%	861
Japan	15%	1,201
Singapore	14%	219
Italy	14%	422
Thailand	13%	283
Hong Kong	13%	165
France	13%	937
China	13%	3,597
South Korea	11%	1,111
Taiwan	11%	300
AUSTRALIANS	13%	1,143

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	32%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	33%
	Older Families	16%	18%
AGE	18-29	30%	28%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	24%
	Average age	38	39
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	22%
	Middle	28%	30%
	High	24%	25%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	18%
	Exploration	17%	20%
	Adventure	14%	13%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	7%
Consideration of Australia		37%	41%
Actively planning to visit Australia		15%	18%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Small vessel/boat (n=2,101)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

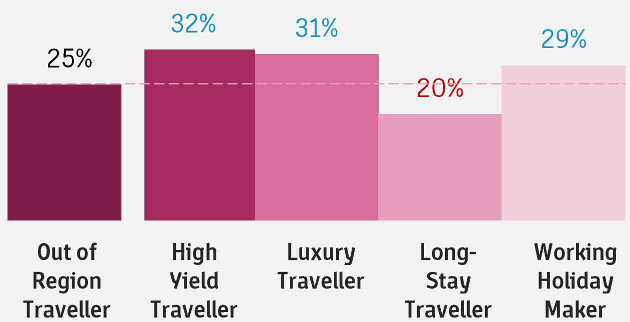
LARGE VESSEL/SHIP

ADVENTURE • JOURNEYS • CRUISING OCEANS, RIVERS OR LAKES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- A quarter of Out of Region Travellers are interested in large vessel/ship cruising, with stronger interest from higher-yielding audiences
- The South Korean market has the highest interest level in cruise ships, while the French are least interested
- Those interested in this experience skew older and towards females and family lifestages
- This audience is more likely to be travel to fulfil reconnection and restoration needs

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	25%	30,960
South Korea	35%	3,420
Taiwan	32%	868
Italy	31%	949
Singapore	30%	469
Canada	29%	1,800
Vietnam	29%	616
New Zealand	29%	214
India	27%	1,003
USA	26%	6,838
Indonesia	25%	346
Hong Kong	24%	297
UK	24%	2,295
Malaysia	23%	390
China	23%	6,606
Philippines	22%	625
Thailand	22%	458
Japan	20%	1,593
Germany	19%	1,043
France	15%	1,139
AUSTRALIANS	30%	2,624

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	31%
	Older Singles/Couples (45+)	16%	21%
	Young Families	32%	30%
	Older Families	16%	19%
AGE	18-29	30%	24%
	30-39	26%	24%
	40-49	22%	24%
	50-64	22%	28%
	Average age	38	40
GENDER	Male	50%	44%
	Female	50%	56%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	27%
	Very high	22%	22%
TRAVELLER MOTIVATIONS	Reconnection	17%	22%
	Into Nature	17%	15%
	Exploration	17%	18%
	Adventure	14%	11%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	8%
Consideration of Australia		37%	42%
Actively planning to visit Australia		15%	17%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Large vessel/ship (n=3,357)

● Significantly higher than those not interested

● Significantly lower than those not interested

TOURISM AUSTRALIA

SENSORY

FOOD & DRINK

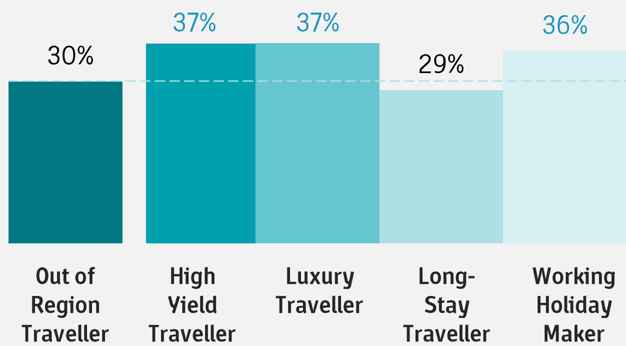
WINE, BEER OR LIQUOR TASTING TOURS

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall 3 in 10 are interested in wine, beer or liquor tasting tours, with greater interest among higher-yielding audiences and Working Holiday Makers
- Greatest demand for this experience from the US market, followed by South Korea and Canada – all of whom rank this in their top 20
- Those interested in tasting tours have higher incomes
- Key cross-sell opportunities include other culinary experiences such as food and drink pairings, meet the maker tours and winery/ agricultural region stays, as well as nightlife

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	16%
	Exploration	17%	19%
	Adventure	14%	12%
	Transformation	13%	13%
	Passion, hobbies	14%	15%
	Restoration	7%	6%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	31%	34	40,019
USA	39%	17	10,200
South Korea	38%	19	3,710
Canada	38%	19	2,354
China	29%	22	8,399
New Zealand	37%	24	276
UK	33%	25	3,187
Japan	29%	27	2,312
Thailand	35%	29	746
Hong Kong	32%	30	393
Italy	33%	32	1,013
Germany	26%	38	1,443
Singapore	26%	40	398
Taiwan	30%	43	810
France	22%	45	1,611
Philippines	34%	45	954
Vietnam	28%	62	589
India	27%	64	1,008
Malaysia	21%	71	348
Indonesia	20%	73	267
AUSTRALIANS	38%	19	3,307

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Wine, beer or liquor tasting tours (n=6,864)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

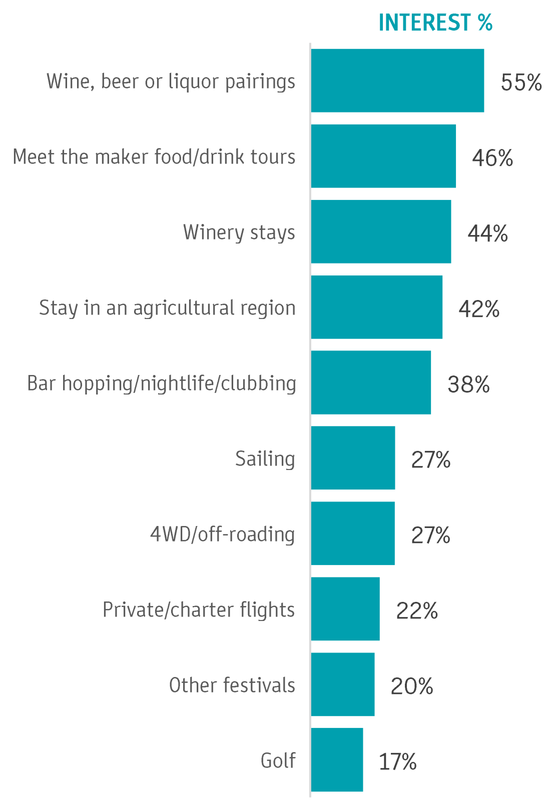
WINE, BEER OR LIQUOR TASTING TOURS

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	32%
	Older Families	16%	16%
AGE	18-29	30%	28%
	30-39	26%	27%
	40-49	22%	23%
	50-64	22%	22%
	Average age	38	39
GENDER	Male	50%	53%
	Female	50%	47%
INCOME	Low	25%	19%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	27%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Opportunity to try new beverages and flavours
- Discover something new that is unavailable at home
- Interested in the process of wine making, beer brewing, and/or alcohol distilling methods

WHY SOME DO NOT

- Do not enjoy alcohol
- Prefer to drink but don't need to do in-depth tour

HERO DESTINATIONS

- Destinations known for wine, beer or liquor
- Notable destinations such as tequila in Mexico, beer in Germany, scotch in Scotland
- Australian wineries

In addition to my love for wine, I also enjoy exploring breweries and distilleries. What would make it better would be if there was a package that offered multiple types of samplings (i.e. wine, beer and liquor)

HIGH YIELD TRAVELLER, UNITED STATES

One of the key objectives of traveling is to try the beer/wine. So this is a must do experience for me. Maybe a knowledge tour combined will a much more enhanced experience

HIGH YIELD TRAVELLER, INDIA

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Wine, beer or liquor tasting tours (n=6,864)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

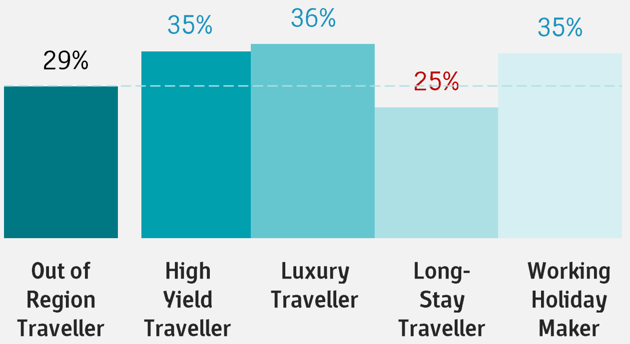
WINE, BEER OR LIQUOR PAIRINGS WITH FOOD

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Food and drink pairings are of interest to 29% overall, with greater interest among higher-yielding audiences and Working Holiday Makers
- China has greatest demand for wine, beer or liquor pairings with food, with almost 2 in 5 interested. This experience ranks in the top 10
- Those interested in food and drink pairings have higher incomes
- Cross-sell and itinerary packaging opportunities include other culinary experiences such as food and drink tasting tours, meet the maker tours and winery/ agricultural region stays, as well as nightlife

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	16%
	Exploration	17%	19%
	Adventure	14%	13%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	29%	41	39,506
China	39%	8	11,132
South Korea	35%	22	3,395
Hong Kong	36%	22	454
USA	34%	24	9,029
Canada	34%	25	2,072
Japan	28%	31	2,242
Taiwan	34%	33	929
Singapore	27%	34	425
Vietnam	34%	38	720
Italy	26%	41	820
New Zealand	30%	41	223
Germany	24%	43	1,357
UK	26%	44	2,533
India	29%	54	1,079
France	17%	57	1,273
Thailand	24%	62	496
Philippines	29%	62	805
Indonesia	18%	75	249
Malaysia	17%	82	275
AUSTRALIANS	31%	31	2,730

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Wine, beer or liquor pairings with food (n=6,472)

● *Significantly higher than those not interested*
● *Significantly lower than those not interested*

TOURISM AUSTRALIA

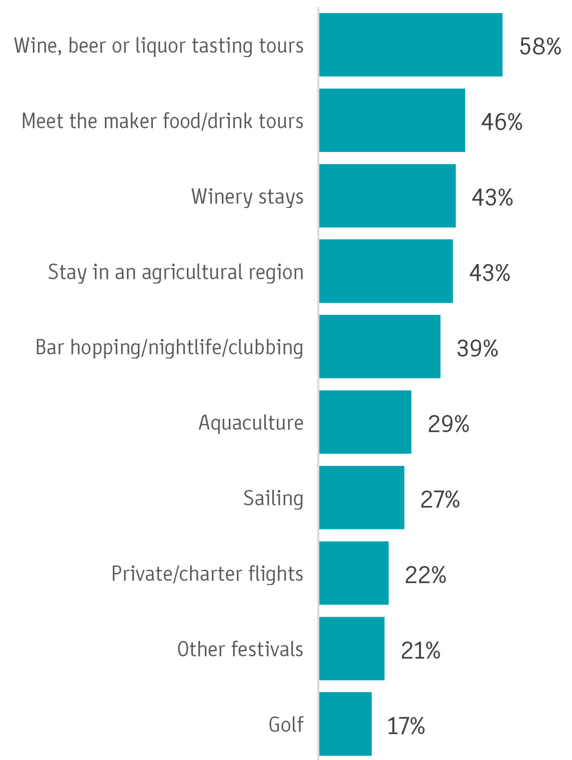
WINE, BEER OR LIQUOR PAIRINGS WITH FOOD

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	33%
	Older Families	16%	16%
AGE	18-29	30%	29%
	30-39	26%	28%
	40-49	22%	22%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	53%
	Female	50%	47%
INCOME	Low	25%	20%
	Middle	28%	29%
	High	24%	26%
	Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Convenient way to try new beverages, flavours, and combinations unavailable at home
- Learn to be more discerning (especially in markets where wine appreciation is new or limited e.g., India)
- Professional pairings allow freedom to enjoy without the hassle of decision making

WHY SOME DO NOT

- Do not drink alcohol

HERO DESTINATIONS

- Famous wine regions e.g., France, Napa Valley
- Ireland for whisky
- Japan for sake
- Locations where you can sit, drink, and enjoy the views

Love German beer. France is famous for its wines however, due to their brand value, it is slightly overpriced. Spain on the other hand has really good wine that not many folks are aware of to which I would like to know what makes their wine really good

HIGH YIELD TRAVELLER, SINGAPORE

Me and my wife would love this experience, we enjoy food and drink and it would be great to get more out of the taste/flavours of foods and drinks with pairings

HIGH YIELD TRAVELLER, UNITED KINGDOM

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Wine, beer or liquor pairings with food (n=6,472)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

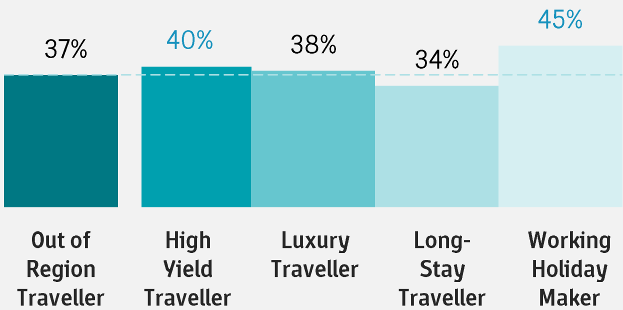
TASTING TRAILS

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 37% of Out of Region Travellers are interested in tasting trails, with greater demand among High Yield Travellers and Working Holiday Makers
- Tasting trails are the #1 ranked experience for South Korea, with 70% interested, accounting for an estimated 6.8 million travellers
- Those interested in tasting trails are more likely to be motivated by exploration, as well as nature and transformative experiences
- Cross-sell and packaging opportunities include meet the maker tours, artisan culinary workshops, staying in renowned agricultural regions or at wineries, ecotourism and glamping

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	18%
	Exploration	17%	19%
	Adventure	14%	12%
	Transformation	13%	14%
	Passion, hobbies	14%	13%
	Restoration	7%	7%
Consideration of Australia		37%	41%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	37%	18	44,919
South Korea	70%	1	6,848
Vietnam	63%	1	1,342
Taiwan	70%	3	1,898
China	42%	5	12,065
Thailand	54%	8	1,134
Italy	46%	13	1,414
France	28%	25	2,100
Germany	32%	27	1,792
Singapore	31%	30	476
New Zealand	31%	36	233
Malaysia	33%	36	557
Hong Kong	27%	39	332
Canada	27%	41	1,648
USA	27%	41	7,058
UK	27%	41	2,569
Indonesia	30%	47	415
Japan	18%	49	1,439
Philippines	26%	73	732
India	24%	76	868
AUSTRALIANS	30%	32	2,652

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Tasting trails (n=7,973)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

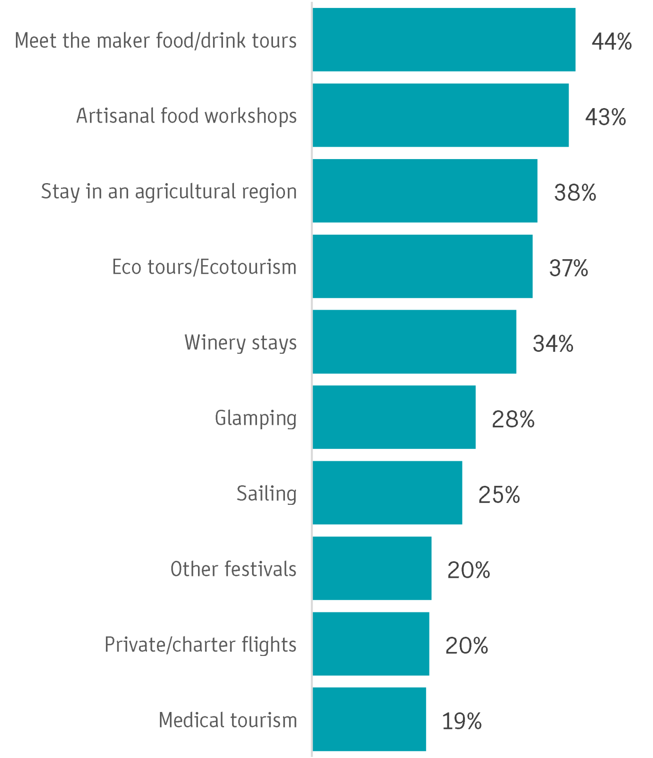
TASTING TRAILS

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTYLE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	15%
	Young Families	32%	32%
	Older Families	16%	17%
AGE	18-29	30%	30%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Fun and easy way to truly immerse in local culture
- Naturally includes meeting locals and close connection to local countryside
- Flexible- travel at own pace and linger where the travel group wants to eat/drink
- Some HYTS see benefit in a local guide to find local gems
- Can be affordable (e.g. street food tours, free samples)
- Easy to add to existing trips/ add to an itinerary spontaneosly

WHY SOME DO NOT

- Some would only participate if unguided, they prefer relaxed serendipity to a curated experience

HERO DESTINATIONS

- Destinations with distinctive cuisine in Italy, Thailand, Japan, Taiwan
- Famous wine regions France, Napa Valley, South Africa
- Destinations with notable food culture: Brazil, New York, Miami, Korea, India
- Street food tours: Mexico

This is part of culture. Learning about a location's food and drink helps learn about the people. This would be a great thing to do if looking to really understand a culture and the location you are visiting. It will be best done with knowledgeable locals as the guide'

HIGH YIELD TRAVELLER, UNITED STATES

In South Africa, I took a wine route, getting to know cities, scenery and people

HIGH YIELD TRAVELLER, GERMANY

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Tasting trails (n=7,973)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

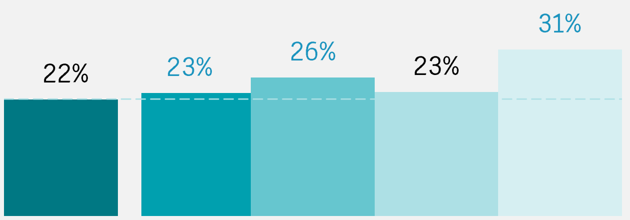
BAR HOPPING/NIGHTLIFE/CLUBBING

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Around 1 in 5 are interested in bar hopping, nightlife or clubbing, with greatest interest among Working Holiday Makers
- Those interested in this experience skew younger (particularly 18-29) and tend to be motivated by exploration as a key travel need
- Cross-sell opportunities include wine, beer or liquor tasting tours, food and drink pairings, music or dance festivals and adventure/ extreme sports

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	15%
	Exploration	17%	19%
	Adventure	14%	15%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	22%	62	25,625
Germany	25%	42	1,381
South Korea	24%	45	2,357
Italy	25%	48	773
UK	25%	48	2,410
Philippines	31%	51	859
Hong Kong	22%	52	280
France	19%	52	1,401
Thailand	25%	56	525
Canada	22%	56	1,342
New Zealand	23%	57	175
USA	21%	58	5,597
Vietnam	28%	58	604
Taiwan	21%	64	565
China	17%	68	4,750
India	25%	71	925
Singapore	18%	73	279
Japan	11%	77	899
Indonesia	17%	79	225
Malaysia	17%	79	280
AUSTRALIANS	25%	50	2,191

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Bar hopping/nightlife/clubbing (n=4,840)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

fiftyfive5 TOURISM AUSTRALIA

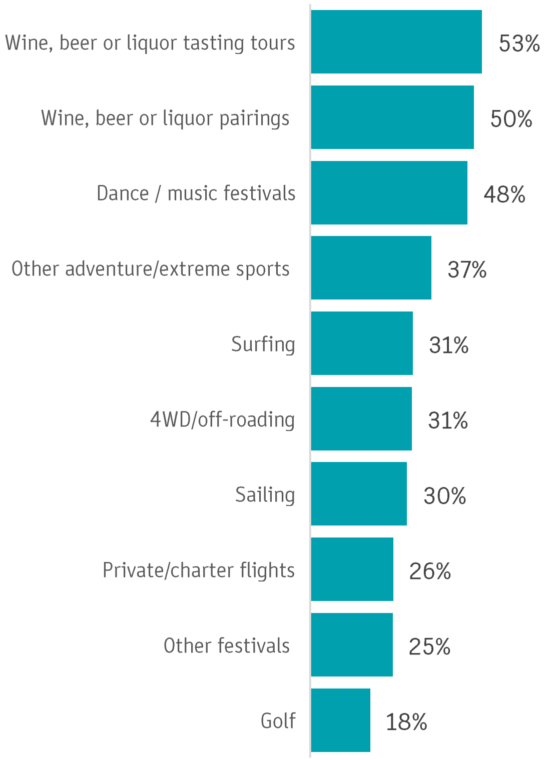
BAR HOPPING/NIGHTLIFE/CLUBBING

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	42%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	33%
	Older Families	16%	14%
AGE	18-29	30%	36%
	30-39	26%	27%
	40-49	22%	21%
	50-64	22%	16%
	Average age	38	36
GENDER	Male	50%	51%
	Female	50%	49%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Bar hopping/nightlife/clubbing (n=4,840)

● *Significantly higher than those not interested* (blue)

● *Significantly lower than those not interested* (red)

TOURISM AUSTRALIA

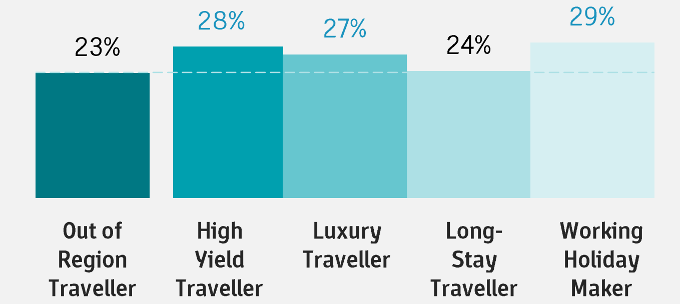
WINERY STAYS

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Around a quarter are interested in winery stays, with greater interest among higher-yielding audiences and Working Holiday Makers
- Those interested in winery stays skew slightly older, female and higher-income
- This audience is more likely to be motivated by exploration and passions or hobbies as key travel needs, wirth strong interest in Australia
- Key cross-sell or itinerary packaging opportunities include wine, beer or liquor tasting tours, pairings with food, and staying in renowned agricultural regions

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	13%
	Transformation	13%	13%
	Passion, hobbies	14%	15%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	24%	57	27,215
Malaysia	35%	31	579
Taiwan	37%	31	1,013
Canada	28%	34	1,750
USA	29%	35	7,633
South Korea	25%	42	2,480
Germany	23%	44	1,312
Hong Kong	25%	46	315
Singapore	25%	46	383
Japan	20%	46	1,570
New Zealand	27%	49	204
UK	23%	51	2,196
Italy	23%	52	713
Thailand	24%	61	497
Philippines	25%	77	699
India	21%	78	784
France	9%	81	695
China	13%	83	3,824
Vietnam	17%	84	366
Indonesia	15%	85	205
AUSTRALIANS	32%	28	2,841

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Winery stays (n=5,249)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

WINERY STAYS

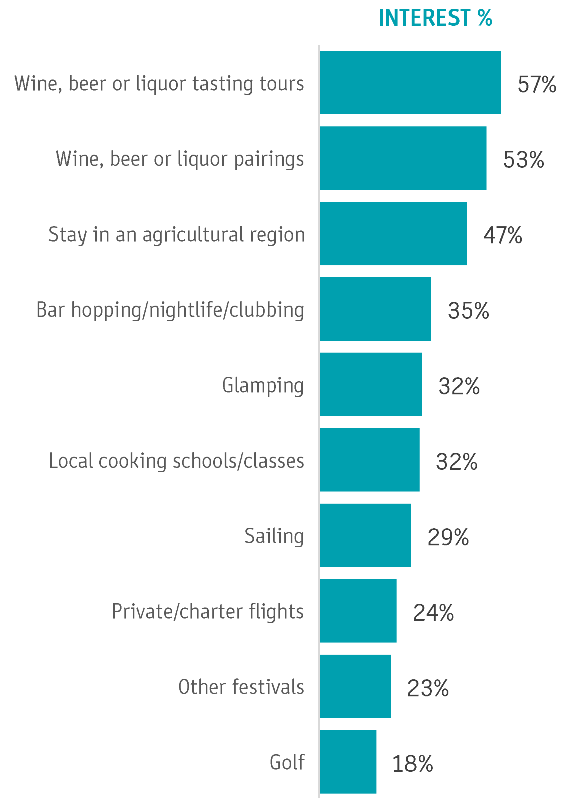
SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

DEMOGRAPHIC PROFILE

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	31%
	Older Families	16%	16%
AGE	18-29	30%	27%
	30-39	26%	26%
	40-49	22%	23%
	50-64	22%	23%
	Average age	38	39
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	21%
	Middle	28%	26%
	High	24%	25%
	Very high	22%	27%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Enjoy wine and learning about wine
- Experience of drinking wine directly from the source
- Overnight stay at a vineyard has an indulgent luxury appeal

WHY SOME DO NOT

- Do not drink or enjoy wine
- Prefer winery experiences to be a short day or add-on experience

HERO DESTINATIONS

- Famous wine regions France, Napa Valley, South Africa
- Wineries with a view

"I love the idea of staying at a vineyard or a winery and being pampered for a weekend. I think it would be really cool and interesting to get wine directly from the source and possible sample wines at different ages in the process

HIGH YIELD TRAVELLER, UNITED STATES

I love the idea of a winery stay, I have always wanted to go to a vineyard so to stay on one sounds great. I can imagine it would be really peaceful and tranquil, not to mention all the lovely wines you would get to try.

HIGH YIELD TRAVELLER, UNITED KINGDOM"

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Winery stays (n=5,249)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

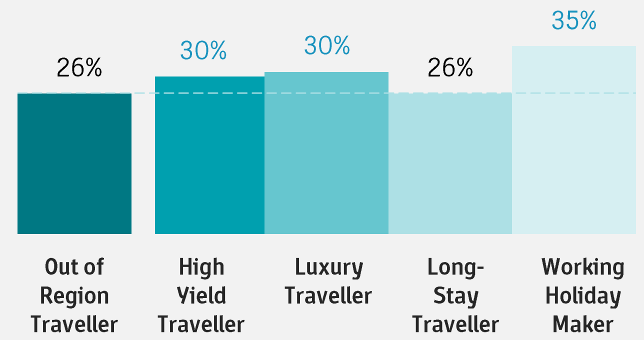
STAY IN A RENOWNED AGRICULTURAL / WINEGROWING REGION

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall around a quarter of Out of Region Travellers are interested in staying in a renowned agricultural or winegrowing region, with greater interest among High Yield and Luxury Travellers and Working Holiday Makers
- This experience is most popular in Malaysia, where 2 in 5 are interested, and it ranks 17th most appealing of the 89 experiences tested
- Those interested in agricultural region stays are heavily motivated by exploration and nature needs when travelling
- Key cross-sell opportunities include wine/beer/liquor pairings, winery stays, and a range of Indigenous experiences

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	19%
	Exploration	17%	20%
	Adventure	14%	13%
	Transformation	13%	13%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	26%	49	29,328
Malaysia	40%	17	669
Indonesia	36%	33	495
Taiwan	32%	35	870
Hong Kong	28%	36	354
Vietnam	34%	37	724
Singapore	27%	37	412
China	24%	39	6,916
Italy	26%	42	816
Japan	21%	43	1,620
South Korea	24%	48	2,343
Thailand	28%	49	598
Germany	20%	51	1,132
India	29%	55	1,075
France	18%	55	1,337
USA	22%	57	5,796
Canada	21%	58	1,293
UK	20%	59	1,911
Philippines	29%	61	809
New Zealand	21%	64	157
AUSTRALIANS	24%	52	2,103

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Stay in a renowned agricultural / winegrowing region (n=5,718)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

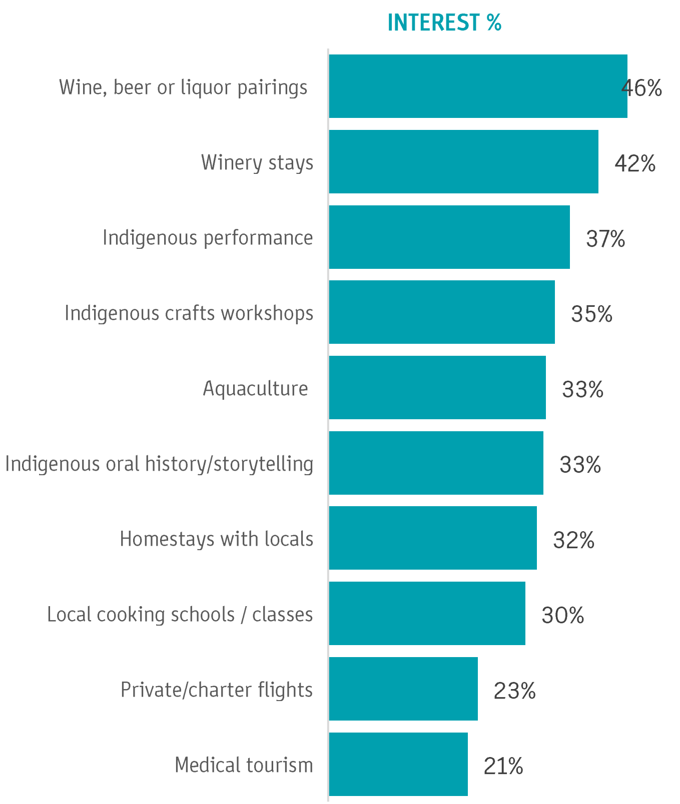
STAY IN A RENOWNED AGRICULTURAL / WINEGROWING REGION

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	32%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	34%
	Older Families	16%	17%
AGE	18-29	30%	27%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	24%
	Average age	38	39
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	21%
	Middle	28%	26%
	High	24%	26%
	Very high	22%	26%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Stay in a renowned agricultural / winegrowing region (n=5,718)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

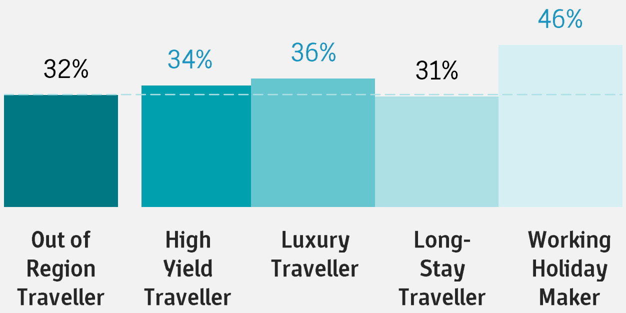
MEET THE MAKER FOOD/DRINK TOURS

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Approximately a third of Out of Region Travellers are interested in meet the maker food or drink tours
- High Yield Travellers, Luxury Travellers and especially Working Holiday Makers have greater demand for this experience, as well as several Asian markets
- Cross-sell opportunities include artisan food making workshops, winery stays, Indigenous experiences (craft workshops and oral history/ storytelling), aquaculture and cooking classes

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	18%
	Exploration	17%	18%
	Adventure	14%	14%
	Transformation	13%	13%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	43%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	31%	31	34,553
Hong Kong	42%	15	518
Philippines	48%	17	1,340
Vietnam	43%	17	922
Thailand	45%	17	941
Taiwan	40%	26	1,089
USA	30%	29	7,986
France	25%	33	1,863
Japan	25%	34	1,959
Indonesia	36%	35	490
Malaysia	34%	35	564
Singapore	26%	38	409
Italy	28%	38	880
Canada	27%	38	1,686
China	24%	40	6,908
UK	25%	47	2,453
India	31%	47	1,154
New Zealand	27%	50	202
South Korea	21%	53	2,086
Germany	20%	55	1,103
AUSTRALIANS	28%	41	2,495

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Meet the maker food/drink tours (n=6,770)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

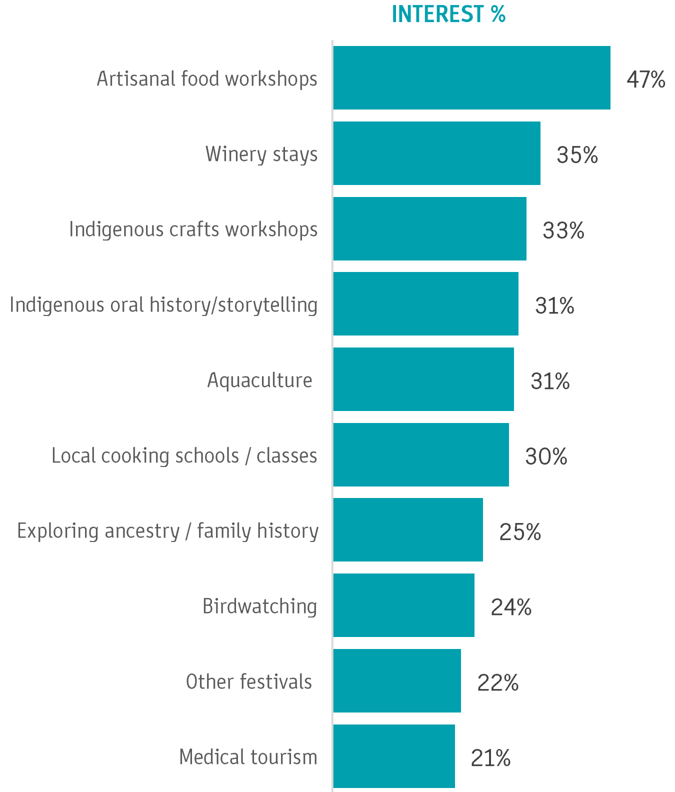
MEET THE MAKER FOOD/DRINK TOURS

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	15%
	Young Families	32%	34%
	Older Families	16%	17%
AGE	18-29	30%	30%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	24%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Meet the maker food/drink tours (n=6,770)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

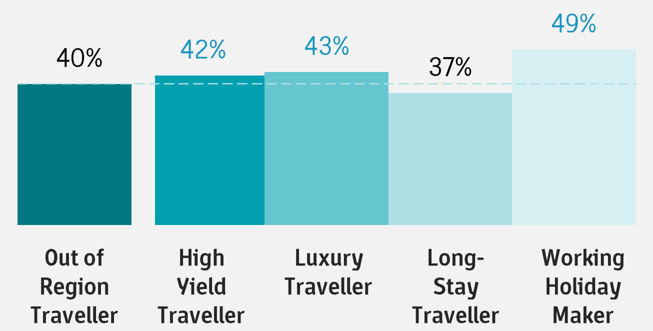
INDIGENOUS FOOD EXPERIENCES

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall 2 in 10 are interested in Indigenous food experiences, with Eastern markets showing the strongest demand
- Those interested in Indigenous food experiences tend to be female, and primarily motivated by exploration and getting into nature when they travel
- Indigenous dining is the sub-experience in greatest demand, followed by a chef's feast using native ingredients, then foraging or gathering. Fishing or hunting attracted the lowest appeal
- Key cross-sell opportunities include a range of other Indigenous experiences across sectors, local homestays and ecotourism

INTEREST IN THE EXPERIENCE BY SEGMENT

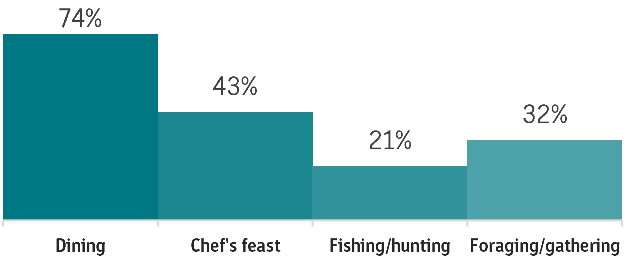


	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	18%
	Exploration	17%	20%
	Adventure	14%	12%
	Transformation	13%	13%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	43%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	39%	14	44,989
Vietnam	61%	3	1,306
Thailand	55%	6	1,161
Indonesia	59%	7	807
Singapore	45%	9	692
India	47%	10	1,728
USA	40%	11	10,620
China	35%	13	10,059
New Zealand	40%	18	300
Malaysia	40%	19	661
Philippines	46%	19	1,298
Taiwan	45%	19	1,214
South Korea	36%	20	3,507
UK	35%	23	3,368
Hong Kong	34%	25	429
Canada	30%	31	1,856
Italy	31%	34	968
Germany	27%	35	1,509
France	25%	35	1,823
Japan	21%	41	1,683
AUSTRALIANS	30%	37	2,599

INTEREST IN SUB-EXPERIENCES



fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Indigenous food experiences (n=8,589)

● *Significantly higher than those not interested*
● *Significantly lower than those not interested*

TOURISM AUSTRALIA

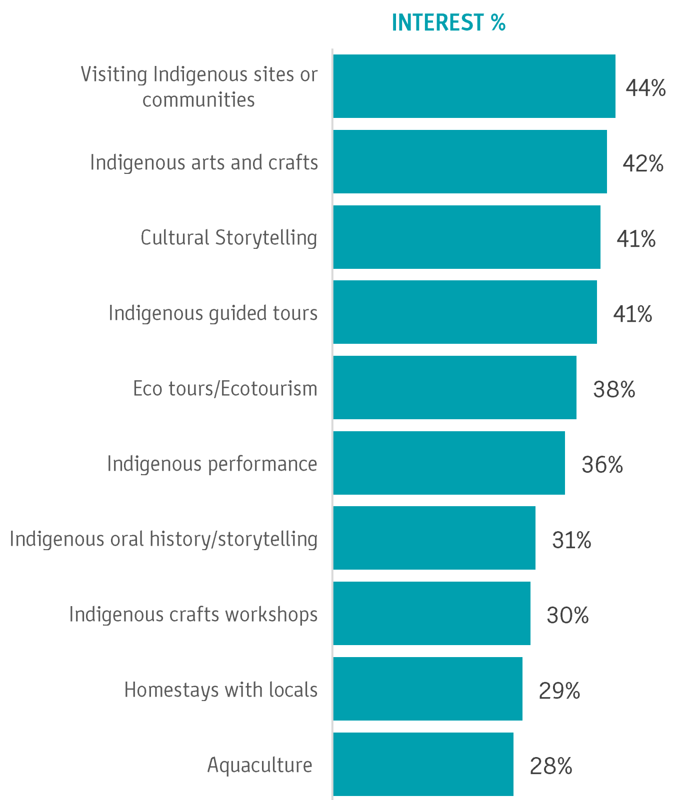
INDIGENOUS FOOD EXPERIENCES

SENSORY • FOOD & DRINK

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	33%
	Older Families	16%	18%
AGE	18-29	30%	29%
	30-39	26%	25%
	40-49	22%	23%
	50-64	22%	22%
	Average age	38	38
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	24%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- An accessible way to learn about the history and culture
- Interested in trying new foods and flavours and cooking techniques

WHY SOME DO NOT

- Uncomfortable with unfamiliar food
- Safety concerns i.e., food hygiene

HERO DESTINATIONS

- Destinations with authentic and legitimate Indigenous tourism
- Cultures with unique foods or ingredients
- African destinations
- Mongolia
- Australia
- Thailand
- South America

I remember eating their local food in a Berber village in the Sahara Desert, and I have a pleasant memory because it surprisingly suited Korean tastes

HIGH YIELD TRAVELLER, SOUTH KOREA

Fulfills my intellectual satisfaction AND my eating satisfaction

HIGH YIELD TRAVELLER, JAPAN

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Indigenous food experiences (n=8,589)

Significantly higher than those not interested · *Significantly lower than those not interested*

TOURISM AUSTRALIA

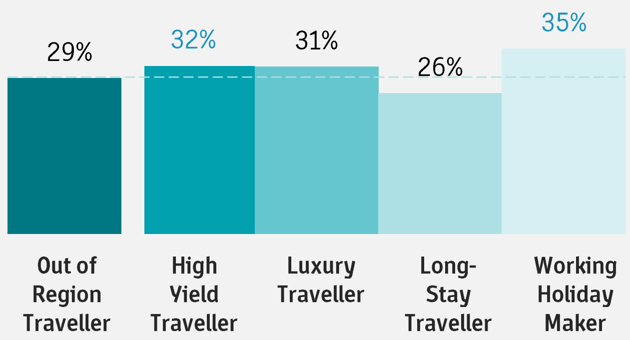
DINING

SENSORY • FOOD & DRINK • INDIGENOUS FOOD EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Around 3 in 10 Out of Region travellers are specifically interested in indigenous dining experiences, with greater interest from both High Yield Travellers and Working Holiday Makers
- Several South/South East Asian markets show high demand for Indigenous dining, followed by New Zealand and the USA
- This audience skews older and is more likely to travel to fulfil nature and exploration needs

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	29%	33,187
Thailand	48%	1,013
Indonesia	47%	638
Vietnam	44%	945
Singapore	36%	562
India	35%	1,291
New Zealand	32%	242
USA	32%	8,350
Taiwan	30%	818
Malaysia	29%	483
Philippines	29%	797
UK	28%	2,728
South Korea	26%	2,559
Italy	24%	749
Hong Kong	24%	300
Canada	21%	1,323
China	20%	5,789
Japan	18%	1,382
France	17%	1,264
Germany	17%	931
AUSTRALIANS	21%	1,852

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	31%
	Older Singles/Couples (45+)	16%	19%
	Young Families	32%	30%
	Older Families	16%	19%
AGE	18-29	30%	24%
	30-39	26%	25%
	40-49	22%	24%
	50-64	22%	27%
	Average age	38	40
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	24%
	Middle	28%	29%
	High	24%	25%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	19%
	Exploration	17%	20%
	Adventure	14%	11%
	Transformation	13%	13%
	Passion, hobbies	14%	11%
	Restoration	7%	8%
Consideration of Australia		37%	37%
Actively planning to visit Australia		15%	15%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Dining (n=3,564)

● Significantly higher than those not interested

● Significantly lower than those not interested

TOURISM AUSTRALIA

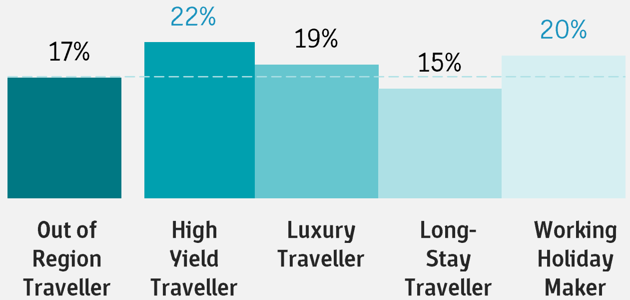
CHEF'S FEAST

SENSORY • FOOD & DRINK • INDIGENOUS FOOD EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 17% are specifically interested in Indigenous chef's feast experiences with native ingredients
- Stronger interest among High Yield Travellers and Working Holiday Makers
- A number of South East Asian markets show higher demand for Indigenous chef's feast experiences
- This audience skews older, with above–average incomes and a greater inclination to travel for exploration and reconnection needs

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	17%	19,242
Vietnam	30%	646
Taiwan	24%	641
Indonesia	22%	302
Singapore	19%	300
Hong Kong	19%	236
New Zealand	18%	137
India	18%	673
China	18%	5,256
Philippines	18%	500
USA	17%	4,587
UK	17%	1,668
Canada	16%	982
Malaysia	16%	261
South Korea	15%	1,489
Germany	15%	823
France	12%	861
Thailand	9%	197
Italy	8%	247
Japan	7%	543
AUSTRALIANS	15%	1,321

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	31%
	Older Singles/Couples (45+)	16%	20%
	Young Families	32%	30%
	Older Families	16%	19%
AGE	18-29	30%	24%
	30-39	26%	24%
	40-49	22%	25%
	50-64	22%	26%
	Average age	38	40
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	23%
	Middle	28%	29%
	High	24%	27%
	Very high	22%	22%
TRAVELLER MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	16%
	Exploration	17%	21%
	Adventure	14%	11%
	Transformation	13%	13%
	Passion, hobbies	14%	12%
	Restoration	7%	7%
Consideration of Australia		37%	38%
Actively planning to visit Australia		15%	15%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Chef's feast (n=2,083)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

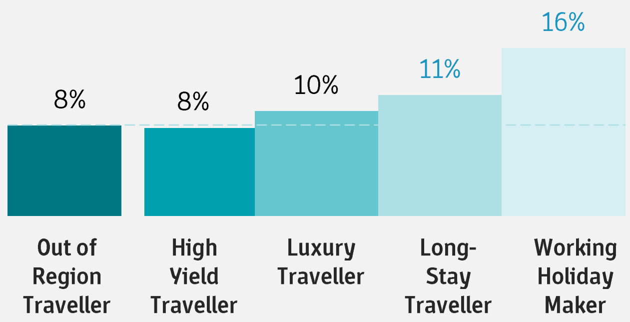
FISHING/HUNTING

SENSORY • FOOD & DRINK • INDIGENOUS FOOD EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, almost 1 in 10 Out of Region Travellers are specifically interested in Indigenous fishing or hunting food experiences, with higher interest from longer-stay audiences
- Vietnam and India are most interested in this experience
- This audience skews towards males and young families and tends to be motivated by adventure when they travel

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	8%	9,620
Vietnam	19%	410
India	15%	547
Philippines	14%	392
Indonesia	12%	161
Malaysia	9%	149
Singapore	8%	131
China	8%	2,414
USA	8%	2,195
Thailand	8%	168
New Zealand	8%	58
Taiwan	8%	205
Hong Kong	7%	84
Italy	7%	206
South Korea	6%	590
Canada	6%	372
UK	6%	558
France	6%	413
Germany	5%	304
Japan	4%	309
AUSTRALIANS	8%	727

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	36%
	Older Families	16%	17%
AGE	18-29	30%	30%
	30-39	26%	29%
	40-49	22%	24%
	50-64	22%	17%
	Average age	38	37
GENDER	Male	50%	58%
	Female	50%	42%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	27%
	Very high	22%	21%
TRAVELLER MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	17%
	Exploration	17%	17%
	Adventure	14%	18%
	Transformation	13%	14%
	Passion, hobbies	14%	11%
	Restoration	7%	6%
Consideration of Australia		37%	40%
Actively planning to visit Australia		15%	18%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Fishing/hunting (n=1,033)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

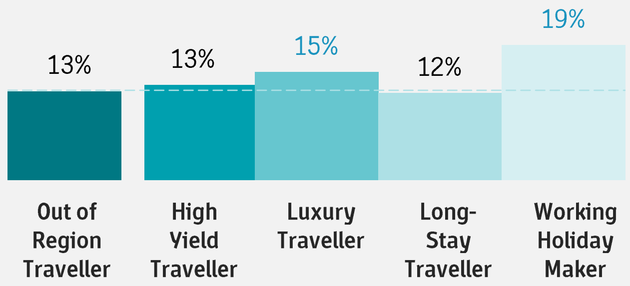
FORAGING/GATHERING

SENSORY • FOOD & DRINK • INDIGENOUS FOOD EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 13% of Out of Region Traveller are specifically interested in the Indigenous food experience of foraging or gathering, with higher interest among Luxury Travellers and Working Holiday makers
- A number of Eastern Markets show greater demand, including emerging markets but also notably China which represents a strong potential volume opportunity with more than 5 million Chinese outbound travellers interested in Indigenous foraging experiences
- The dominant travel motivation among this audience is getting into nature

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	13%	14,253
Philippines	24%	665
Vietnam	23%	487
Thailand	22%	472
Indonesia	19%	261
China	18%	5,298
Malaysia	18%	302
Taiwan	14%	384
Hong Kong	14%	172
India	13%	481
Singapore	11%	171
France	10%	740
New Zealand	9%	71
UK	9%	904
Germany	8%	472
USA	8%	2,009
Canada	7%	438
Italy	7%	207
South Korea	5%	476
Japan	3%	245
AUSTRALIANS	10%	859

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	31%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	34%
	Older Families	16%	18%
AGE	18-29	30%	27%
	30-39	26%	27%
	40-49	22%	24%
	50-64	22%	23%
	Average age	38	39
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	23%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	22%
	Exploration	17%	19%
	Adventure	14%	13%
	Transformation	13%	14%
	Passion, hobbies	14%	10%
	Restoration	7%	6%
Consideration of Australia		37%	38%
Actively planning to visit Australia		15%	15%

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Foraging/gathering (n=1,480)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

SENSORY

POPULAR EXPERIENCES

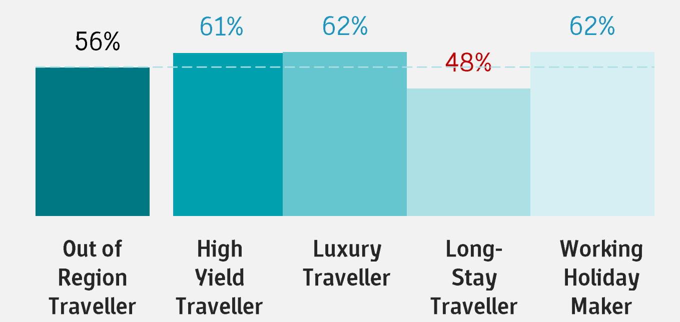
SHOPPING

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- More than half of travellers are interested in shopping, with higher-yielding audiences and Working Holiday Makers showing significantly greater demand
- Overall, shopping ranks as the 3rd most popular experience globally, and even higher (ranked 2nd) in Singapore, Japan and Malaysia (as well as emerging market Thailand) – however, France and Italy are markedly less interested (ranked 10th and 17th respectively)
- Shopping with a connection to the destination is in greatest demand, with souvenirs and local handicrafts the most popular forms
- Cross-sell options include other popular experiences such as food and drink festivals, theme parks and zoos, as well as spa treatments

INTEREST IN THE EXPERIENCE BY SEGMENT

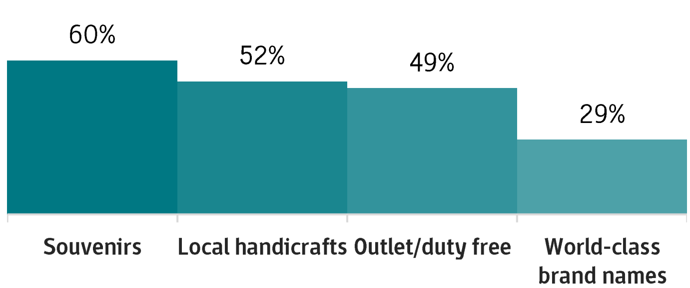


	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	20%
	Into Nature	17%	17%
	Exploration	17%	18%
	Adventure	14%	13%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	7%
Consideration of Australia		37%	42%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	56%	3	62,761
Singapore	62%	2	961
Japan	62%	2	4,884
Malaysia	64%	2	1,057
Thailand	61%	2	1,282
UK	51%	3	4,915
Hong Kong	65%	3	811
Philippines	65%	3	1,826
India	59%	3	2,160
New Zealand	56%	3	420
USA	50%	4	13,301
Canada	54%	4	3,342
Indonesia	62%	4	839
Taiwan	66%	4	1,778
Germany	47%	4	2,647
South Korea	58%	5	5,687
China	40%	7	11,538
Vietnam	56%	7	1,207
France	38%	10	2,822
Italy	41%	17	1,285
AUSTRALIANS	57%	3	5,045

INTEREST IN SUB-EXPERIENCES



fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Shopping (n=12,095)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

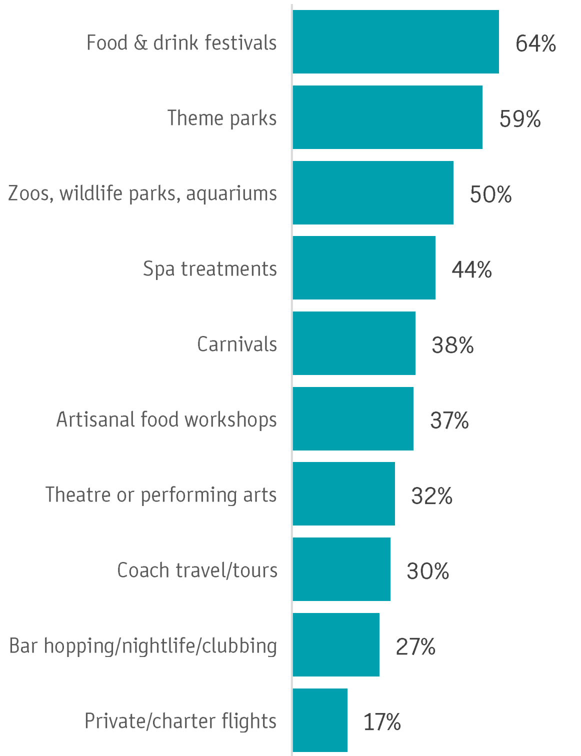
SHOPPING

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	15%
	Young Families	32%	32%
	Older Families	16%	17%
AGE	18-29	30%	30%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	44%
	Female	50%	56%
INCOME	Low	25%	24%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Gives money to local communities, opportunity to have memorable souvenirs

WHY SOME DO NOT

• Not unique to a place- can do shopping at home.

HERO DESTINATIONS

• Hawaii • Milan • Local markets dependent on location

Making sure I saved enough time to do some shopping while being able to see how some of the local things are made by hand would also be a very important part of my trip.

HIGH YIELD TRAVELLER, UNITED STATES

This trip must be sealed with shopping for beautiful designer clothes and accessories that is not found in one's country. The prices, contrary to popular belief are not that expensive, given the good quality and will be all worth the money spent.

HIGH YIELD TRAVELLER, SINGAPORE

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Shopping (n=12,095)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

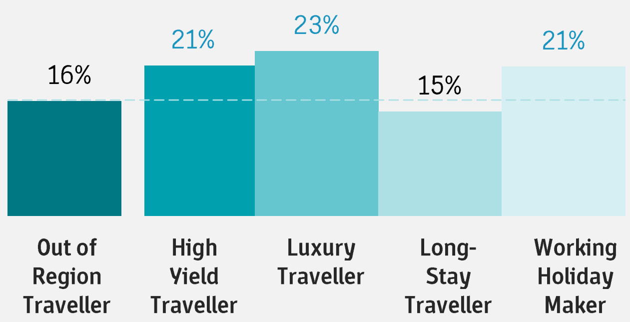
WORLD-CLASS BRAND NAMES

SENSORY • POPULAR EXPERIENCES • SHOPPING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 16% are interested in shopping specifically for world-class brand names, but more than 1 in 5 High Yield and Luxury Travellers and Working Holiday Makers
- A number of Eastern markets have higher demand for this experience, as well as New Zealanders and Australians
- This audience tends to earn higher incomes, with a skew towards young families and 30-39 year olds
- Reconnection is the leading travel motivation among those interested in world-class shopping

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	16%	18,238
Thailand	23%	476
India	22%	824
Malaysia	21%	344
Hong Kong	20%	249
New Zealand	19%	145
South Korea	19%	1,864
Singapore	18%	281
USA	17%	4,597
Philippines	17%	476
Vietnam	17%	361
Canada	17%	1,043
Indonesia	17%	227
Taiwan	15%	396
UK	14%	1,347
Germany	13%	758
Japan	13%	1,054
China	12%	3,423
Italy	8%	263
France	8%	569
AUSTRALIANS	20%	1,770

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	35%
	Older Families	16%	17%
AGE	18-29	30%	28%
	30-39	26%	30%
	40-49	22%	21%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	21%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	26%
TRAVELLER MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	16%
	Exploration	17%	13%
	Adventure	14%	15%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	8%
Consideration of Australia		37%	38%
Actively planning to visit Australia		15%	15%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in World-class brand names (n=1,563)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

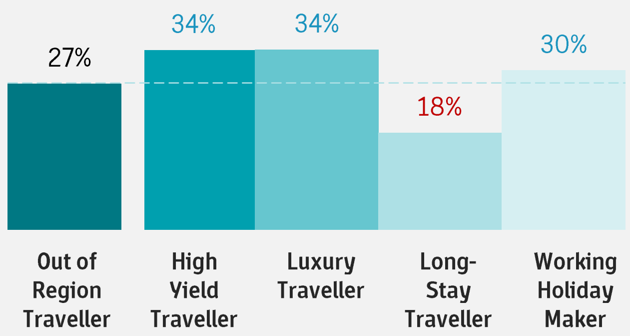
OUTLET/DUTY FREE

SENSORY • POPULAR EXPERIENCES • SHOPPING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, more than a quarter of Out of Region traveller are interested in outlet or duty free shopping, with greater demand from higher-yielding segments and Working Holiday Makers
- Eastern markets generally show higher interest in outlet or duty free shopping, while the UK/Europe and North America tend to be less interested
- This audience skew older and female, with greater reconnection and restoration travel needs
- Those interested in outlet//duty free shopping are less likely to be considering or intending to visit Australia for a holiday

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	27%	30,827
Taiwan	45%	1,223
South Korea	42%	4,133
Malaysia	38%	628
Singapore	35%	535
Thailand	32%	683
Japan	32%	2,517
Vietnam	31%	660
Hong Kong	29%	364
New Zealand	28%	210
Indonesia	26%	359
India	25%	929
Philippines	25%	701
China	25%	7,168
UK	23%	2,228
Canada	23%	1,402
Germany	23%	1,269
Italy	17%	522
USA	14%	3,672
France	11%	814
AUSTRALIANS	27%	2,367

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	31%
	Older Families	16%	19%
AGE	18-29	30%	24%
	30-39	26%	27%
	40-49	22%	24%
	50-64	22%	25%
	Average age	38	40
GENDER	Male	50%	45%
	Female	50%	55%
INCOME	Low	25%	23%
	Middle	28%	29%
	High	24%	25%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	22%
	Into Nature	17%	16%
	Exploration	17%	15%
	Adventure	14%	11%
	Transformation	13%	13%
	Passion, hobbies	14%	14%
	Restoration	7%	9%
Consideration of Australia		37%	33%
Actively planning to visit Australia		15%	12%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Outlet/duty free (n=2,574)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

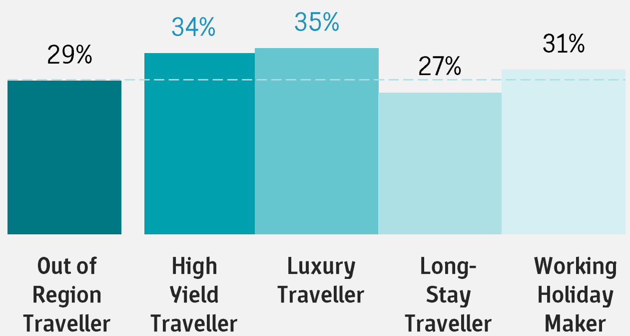
LOCAL HANDICRAFTS

SENSORY • POPULAR EXPERIENCES • SHOPPING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, almost 3 in 10 Out of Region Travellers are specifically interested in shopping for local handicrafts
- Shopping for handicrafts is particularly appealing to High Yield and Luxury Traveller segments, as well as sseveral Eastern markets
- Those interested in shopping for local handicrafts tend to be older, with a heavy female skew
- This audience is more likely to travel for reconnection and restoration, but less likely to be considering or intending to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	29%	32,459
Indonesia	43%	592
Philippines	42%	1,170
Hong Kong	41%	510
India	39%	1,430
Thailand	35%	734
Malaysia	34%	568
Taiwan	34%	910
Singapore	32%	489
Vietnam	31%	665
New Zealand	28%	210
Canada	27%	1,646
USA	26%	6,939
Italy	25%	782
UK	24%	2,278
South Korea	23%	2,291
Germany	21%	1,167
China	19%	5,533
France	19%	1,381
Japan	14%	1,114
AUSTRALIANS	31%	2,722

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	32%
	Older Singles/Couples (45+)	16%	19%
	Young Families	32%	31%
	Older Families	16%	18%
AGE	18-29	30%	24%
	30-39	26%	26%
	40-49	22%	23%
	50-64	22%	26%
	Average age	38	40
GENDER	Male	50%	41%
	Female	50%	59%
INCOME	Low	25%	25%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	22%
TRAVELLER MOTIVATIONS	Reconnection	17%	22%
	Into Nature	17%	15%
	Exploration	17%	18%
	Adventure	14%	13%
	Transformation	13%	12%
	Passion, hobbies	14%	12%
	Restoration	7%	9%
	Consideration of Australia	37%	33%
	Actively planning to visit Australia	15%	12%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Local handicrafts (n=2,714)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

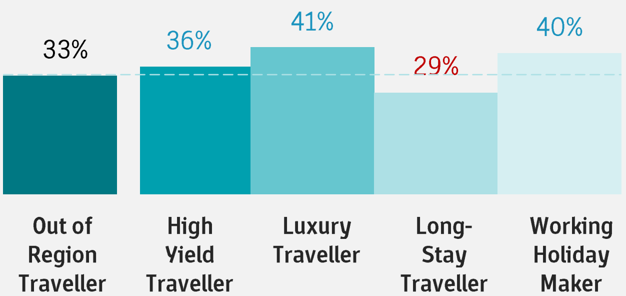
SOUVENIRS

SENSORY • POPULAR EXPERIENCES • SHOPPING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, a third of Out of Region Travellers are specifically interested in shopping for souvenirs
- Higher-yielding segments (particularly Luxury Travellers) and Working Holiday Makers have significantly higher interest in souvenirs
- Higher interest among several Eastern markets, with more than half of Indonesian travellers interested in souvenir shopping
- Those interested in this experience are more likely to be female, with a greater inclination to travel for reconnection and restoration motivations, but below-average consideration and intention to visit Australia in the next 2 to 4 years

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	33%	37,617
Indonesia	51%	694
Philippines	50%	1,394
Thailand	46%	964
Japan	45%	3,520
Malaysia	44%	727
Hong Kong	39%	487
Taiwan	39%	1,051
Vietnam	37%	784
Singapore	34%	526
USA	31%	8,191
Canada	28%	1,754
UK	28%	2,721
Italy	27%	853
New Zealand	27%	203
Germany	25%	1,436
South Korea	24%	2,387
France	24%	1,792
China	19%	5,509
India	16%	572
AUSTRALIANS	27%	2,350

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Souvenirs (n=3,057)

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	15%
	Young Families	32%	32%
	Older Families	16%	17%
AGE	18-29	30%	29%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	45%
	Female	50%	55%
INCOME	Low	25%	26%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	21%
TRAVELLER MOTIVATIONS	Reconnection	17%	21%
	Into Nature	17%	15%
	Exploration	17%	17%
	Adventure	14%	12%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	9%
Consideration of Australia		37%	33%
Actively planning to visit Australia		15%	12%

● Significantly higher than those not interested

● Significantly lower than those not interested

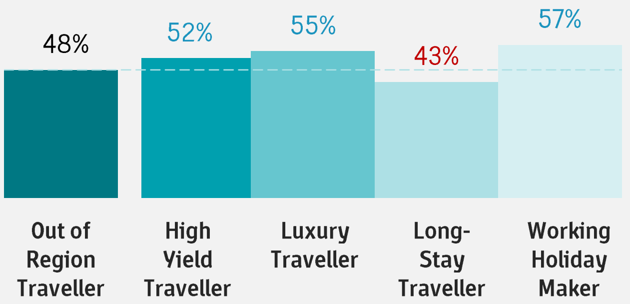
THEME PARKS

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost half are interested in theme parks, with greater demand among higher-yielding audiences and Working Holiday Makers
- Theme parks rank within the top 10 for 10 international markets, plus the domestic audience
- Those interested in theme parks tend to be motivated by reconnection and exploration as key travel needs
- This audience skews towards young families and females
- Key cross-sell opportunities include zoos and animal encounters, performing arts (carnivals, dance/music festivals, theatre, Indigenous performance) and coach travel or tours

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	17%
	Exploration	17%	18%
	Adventure	14%	13%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	7%
Consideration of Australia		37%	42%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	48%	6	54,437
Philippines	69%	2	1,925
China	43%	4	12,368
Hong Kong	62%	4	773
Malaysia	51%	5	846
Taiwan	63%	5	1,691
Japan	47%	5	3,731
India	52%	6	1,897
Singapore	48%	6	739
Indonesia	61%	6	827
New Zealand	48%	9	360
France	37%	11	2,761
South Korea	49%	11	4,755
Thailand	49%	12	1,037
USA	40%	15	10,463
UK	38%	15	3,674
Italy	45%	15	1,389
Germany	37%	16	2,107
Canada	38%	20	2,352
Vietnam	35%	35	740
AUSTRALIANS	44%	10	3,891

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Theme parks (n=10,445)

Significantly higher than those not interested · *Significantly lower than those not interested*

TOURISM AUSTRALIA

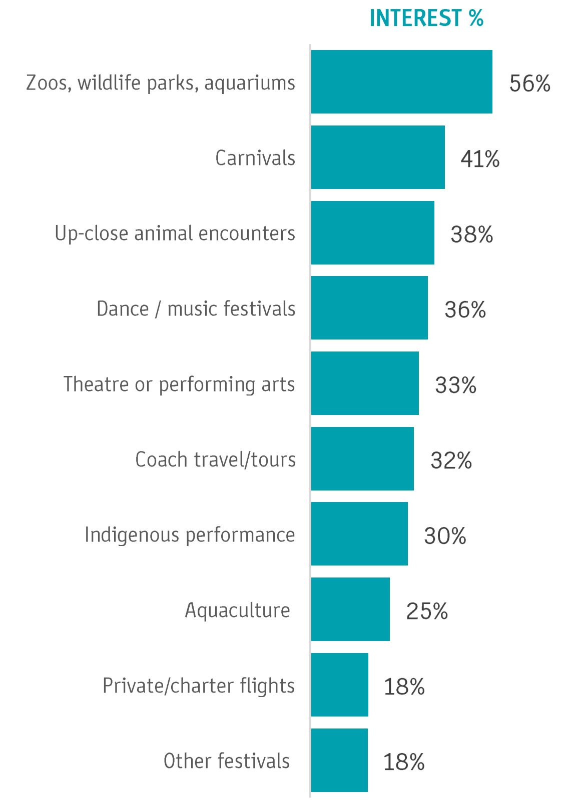
THEME PARKS

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	35%
	Older Families	16%	17%
AGE	18-29	30%	31%
	30-39	26%	27%
	40-49	22%	23%
	50-64	22%	19%
	Average age	38	37
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- A thrilling and fun experience in a happy, carefree atmosphere
- Easy day plan for families - especially appreciate it can be a flexible daytime activity their kids love

WHY SOME DO NOT

- Fear of the rides, long time waiting in lines, feel like once they've done one, they've done them all (been there done that)

HERO DESTINATIONS

- USA (Disneyland, Universal Studios), Japan Disneyland • Australia (Dreamland, Movie World, Sea World)

I love theme parks - There are rides for everyone and it generally takes me back to feeling like a kid again!

HIGH YIELD TRAVELLER, NEW ZEALAND

I love theme parks, especially Disney parks but others too, and so this hugely influences my travel choices. Trying out different foods, especially Mickey-shaped food.

HIGH YIELD TRAVELLER, UNITED KINGDOM

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Theme parks (n=10,445)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

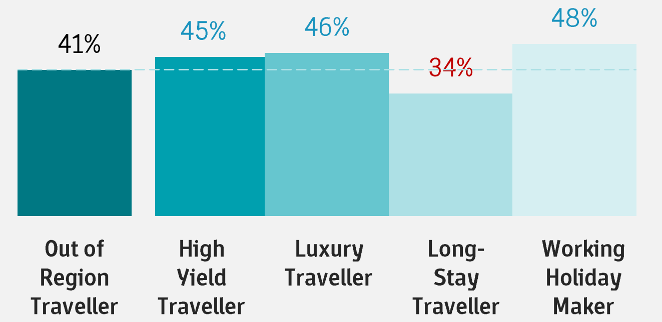
ZOOS, WILDLIFE PARKS, AQUARIUMS

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average 2 in 5 Out Of Region Travellers are interested in zoos, wildlife parks and aquariums, with strongest interest from High Yield and Luxury Travellers and Working Holiday Makers, and several Eastern markets
- This audience skews towards young families and female travellers
- Those interested in zoos, wildlife parks and aquariums have a stronger than average interest in visiting Australia
- Strong cross-sell opportunities with theme parks and wildlife experiences

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	18%
	Exploration	17%	18%
	Adventure	14%	13%
	Transformation	13%	11%
	Passion, hobbies	14%	14%
	Restoration	7%	7%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	41%	11	47,245
India	49%	8	1,810
Hong Kong	44%	8	548
New Zealand	47%	10	351
Philippines	55%	10	1,544
Malaysia	45%	10	744
Japan	40%	12	3,118
Indonesia	47%	12	640
Vietnam	45%	13	970
USA	40%	14	10,572
China	34%	15	9,790
UK	38%	16	3,648
Italy	42%	16	1,317
Singapore	36%	17	562
Taiwan	46%	17	1,247
France	33%	19	2,428
Germany	35%	21	1,962
Canada	37%	21	2,269
Thailand	37%	28	771
South Korea	30%	33	2,954
AUSTRALIANS	45%	8	3,908

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Zoos, wildlife parks, aquariums (n=9,029)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

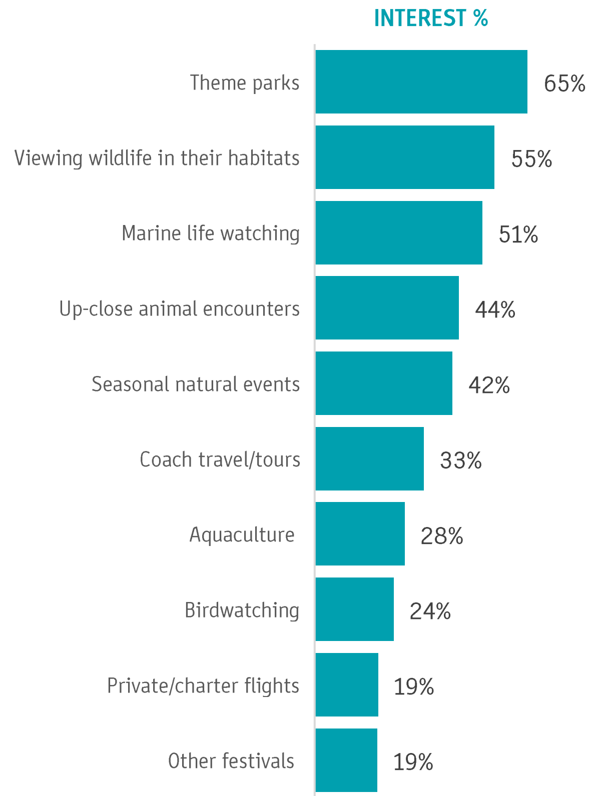
ZOOS, WILDLIFE PARKS, AQUARIUMS

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	35%
	Older Families	16%	16%
AGE	18-29	30%	31%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	20%
	Average age	38	38
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	25%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Close proximity to animals - a memorable experience, ability to see rare animals, a fun family experience

WHY SOME DO NOT

• Concerns around dangerous wildlife

HERO DESTINATIONS

• Australia zoo ('Steve Irwin's zoo) • San Diego zoo

I love animals and going to the zoo. I find animals fascinating - they are so different but so interesting to just see them. Being able to interact with them would be an experience I would love to do.

HIGH YIELD TRAVELLER, INDIA

I love this because it never fails to entertain the kids, they will always be amazed by such experiences. The sense of adventure definitely increases. I love getting in touch with wildlife and seeing how they live

HIGH YIELD TRAVELLER, SINGAPORE

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Zoos, wildlife parks, aquariums (n=9,029)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

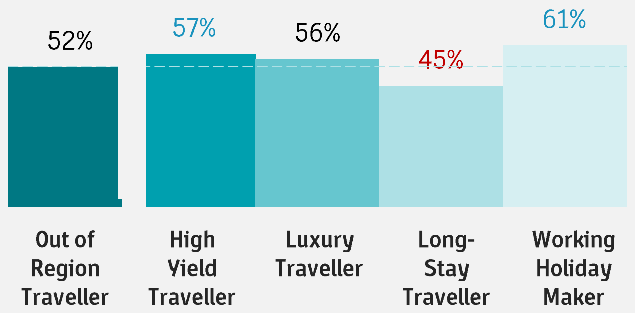
FOOD & DRINK FESTIVALS

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- More than half are interested in food and drink festivals, with strongest interest among several Asian markets and Canada
- Food and drink festivals are within the top 10 experiences for all markets except Germany, France and the Philippines
- Those interested in food and drink festivals skew slightly female and are most likely to be motivated by exploration when they travel
- Key cross-sell opportunities are heavily food-based and include Indigenous food experiences, tasting trails, meet the maker and artisan food workshops

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	12%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	7%
Consideration of Australia		37%	42%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	52%	4	61,800
Vietnam	62%	2	1,323
South Korea	59%	3	5,789
Thailand	59%	3	1,255
Canada	57%	3	3,516
Malaysia	58%	3	965
China	45%	3	12,805
USA	55%	3	14,503
Singapore	54%	4	840
UK	47%	4	4,531
India	54%	5	1,964
Hong Kong	61%	5	765
Indonesia	61%	5	831
New Zealand	50%	6	374
Taiwan	62%	6	1,687
Italy	47%	10	1,471
Japan	42%	10	3,308
Philippines	54%	11	1,509
Germany	39%	12	2,175
France	30%	23	2,188
AUSTRALIANS	52%	4	4,520

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Food & drink festivals (n=11,420)

Significantly higher than those not interested

Significantly lower than those not interested

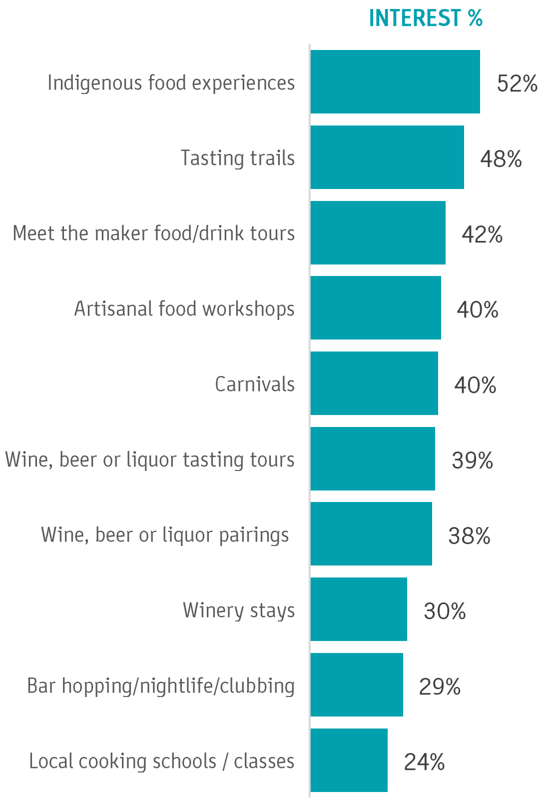
FOOD & DRINK FESTIVALS

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	15%
	Young Families	32%	32%
	Older Families	16%	17%
AGE	18-29	30%	30%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Easy way to enjoy and discover a destination's local culture
- Immersive experience and includes other experiences e.g., music, dance, crafts
- Offers a variety and an opportunity to chat to vendors and learn more about the food and drink without pressure to participate

WHY SOME DO NOT

- Do not enjoy large crowds and lines

HERO DESTINATIONS

- Destinations with known festivals e.g., Oktoberfest in Germany, Parma Ham Festival in Italy
- Countries with strong culinary culture e.g., France

"I would absolutely love to experience the cuisine of an exotic location in the form of a food festival. I enjoy these types of festivals because there is usually a large amount of vendors slinging a bunch of different items. To me this is enjoyable because you get to sample a variety of different things while being in one location.

HIGH YIELD TRAVELLER, UNITED STATES

I love eating and drinking so I would love to go to a festival where these are the theme! I love trying new food and drink and feeling inspired by different dishes and flavours!

HIGH YIELD TRAVELLER, UNITED KINGDOM"

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Food & drink festivals (n=11,420)

Significantly higher than those not interested (shown in blue)

Significantly lower than those not interested (shown in red)

TOURISM AUSTRALIA

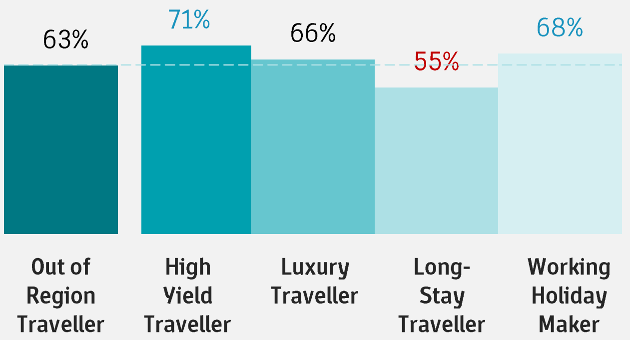
DINING OUT

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Dining out is the most popular experience at a global level and ranks in the top 10 for all markets
- Those interested in this experiences are most likely to travel for reconnection, followed by exploration
- This audience skews slightly older and female
- The dining experiences in greatest demand are linked to sense of place: street food and unique cuisine or local specialties
- Diverse cross-sell opportunities include food and drink festivals, Indigenous food, natural landmarks, auroras and night sky photography

INTEREST IN THE EXPERIENCE BY SEGMENT

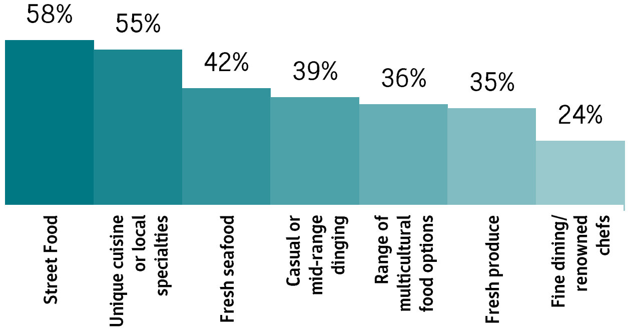


	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	20%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	12%
	Transformation	13%	11%
	Passion, hobbies	14%	14%
	Restoration	7%	7%
Consideration of Australia		37%	41%
Actively planning to visit Australia		15%	16%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	63%	1	72,872
USA	64%	1	16,993
India	61%	1	2,249
UK	61%	1	5,896
New Zealand	65%	1	489
Malaysia	71%	1	1,180
Japan	72%	1	5,643
Singapore	63%	1	979
Taiwan	75%	1	2,023
Canada	65%	1	4,017
Indonesia	72%	1	978
Philippines	75%	1	2,095
Hong Kong	72%	1	900
Germany	65%	2	3,675
South Korea	62%	2	6,045
France	50%	3	3,692
Vietnam	59%	4	1,257
Thailand	56%	5	1,191
China	42%	6	12,033
Italy	49%	8	1,536
AUSTRALIANS	65%	1	5,742

INTEREST IN SUB-EXPERIENCES



fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Dining out e.g. restaurants, street food (n=13,860)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

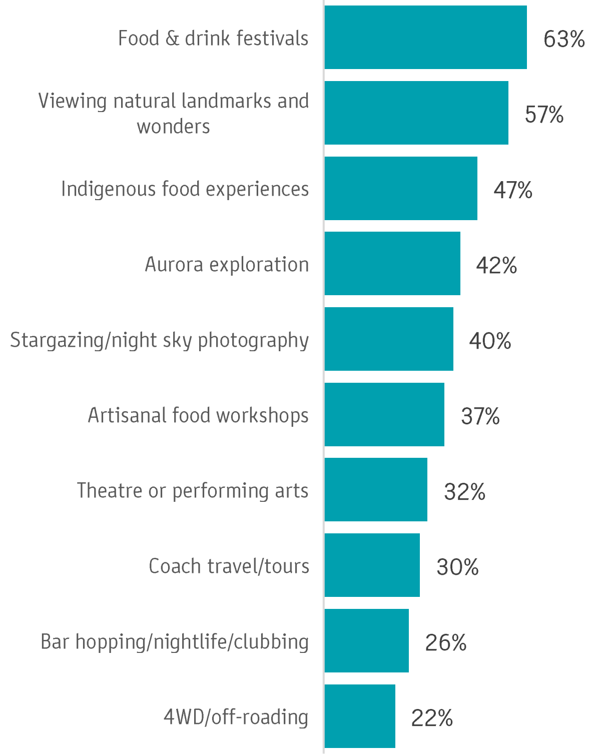
DINING OUT

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	30%
	Older Families	16%	16%
AGE	18-29	30%	29%
	30-39	26%	25%
	40-49	22%	22%
	50-64	22%	23%
	Average age	38	39
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Trying unique and exotic food from different cultures.
• Easy spontaneous activity to do.
• Can be an affordable experience (e.g. street food)

WHY SOME DO NOT

• Appealing overall - some prefer street food to have more variety and options to choose from (something for everyone)

HERO DESTINATIONS

• Destinations with distinctive cuisine in Italy, Thailand, Japan, Taiwan.
• Destinations with notable food culture: Brazil, New York, Miami, Korea, India. Street food - Mexico

I would think local favorite spots that are not openly promoted on regular travel sites including local famous restaurants, which are only known by those who live there.

HIGH YIELD TRAVELLER, UNITED STATES

Street food ... I like to try street food, you can get restaurant quality food at low cost.

HIGH YIELD TRAVELLER, NEW ZEALAND

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Dining out e.g. restaurants, street food (n=13,860)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

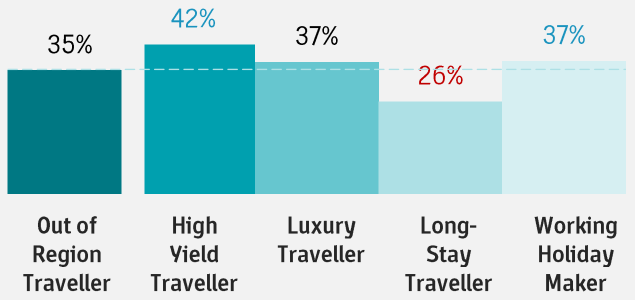
UNIQUE CUISINE OR LOCAL SPECIALTIES

SENSORY • POPULAR EXPERIENCES • DINING OUT

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 35% of Out of Region Travellers are specifically interested in unique cuisine or local specialties when they travel, with higher interest among High Yield Travellers and Working Holiday Makers
- Demand for this experience is higher among several Eastern markets
- Those interested in casual or mid-range dining skew older, particularly singles/couples, and are more likely to be motivated by reconnection and restoration needs
- This audience has lower consideration and intention to visit Australia for a holiday in the near term

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	35%	40,126
Taiwan	57%	1,538
Hong Kong	50%	623
Indonesia	43%	580
Malaysia	39%	655
Vietnam	39%	835
Germany	37%	2,107
Philippines	36%	1,011
Italy	34%	1,045
Japan	33%	2,580
Singapore	32%	497
South Korea	32%	3,089
Canada	31%	1,944
USA	31%	8,300
Thailand	30%	642
New Zealand	28%	213
China	28%	7,898
India	27%	995
France	27%	2,005
UK	24%	2,321
AUSTRALIANS	31%	2,678

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	21%
	Young Families	32%	27%
	Older Families	16%	18%
AGE	18-29	30%	25%
	30-39	26%	25%
	40-49	22%	23%
	50-64	22%	28%
	Average age	38	40
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	24%
	Middle	28%	30%
	High	24%	25%
	Very high	22%	21%
TRAVELLER MOTIVATIONS	Reconnection	17%	21%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	10%
	Transformation	13%	11%
	Passion, hobbies	14%	12%
	Restoration	7%	9%
Consideration of Australia		37%	31%
Actively planning to visit Australia		15%	10%

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Unique cuisine or local specialties (n=2,901)

● Significantly higher than those not interested

● Significantly lower than those not interested

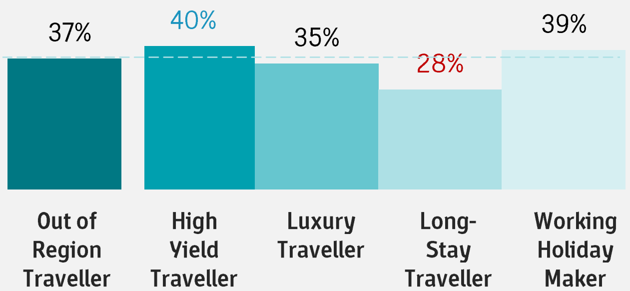
STREET FOOD

SENSORY • POPULAR EXPERIENCES • DINING OUT

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 37% of Out of Region Travellers are specifically interested in street food when they travel, with High Yield Travellers, several Eastern markets and New Zealand
- Those interested in street food skew older, with lower incomes, and are more likely to be motivated by restoration needs
- This audience has lower consideration and intention to visit Australia for a holiday in the near term

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	37%	42,457
Taiwan	55%	1,495
Philippines	52%	1,440
Hong Kong	51%	634
Indonesia	47%	636
Singapore	44%	675
Vietnam	43%	912
NZ	42%	312
India	39%	1,414
Malaysia	39%	640
South Korea	37%	3,654
Canada	36%	2,247
Japan	36%	2,811
USA	32%	8,488
Germany	32%	1,778
UK	30%	2,913
Thailand	27%	565
Italy	26%	822
China	23%	6,510
France	18%	1,299
AUSTRALIANS	39%	3,427

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	19%
	Young Families	32%	28%
	Older Families	16%	17%
AGE	18-29	30%	28%
	30-39	26%	24%
	40-49	22%	23%
	50-64	22%	25%
	Average age	38	39
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	27%
	Middle	28%	30%
	High	24%	24%
	Very high	22%	19%
TRAVELLER MOTIVATIONS	Reconnection	17%	21%
	Into Nature	17%	17%
	Exploration	17%	18%
	Adventure	14%	11%
	Transformation	13%	11%
	Passion, hobbies	14%	12%
	Restoration	7%	10%
Consideration of Australia		37%	32%
Actively planning to visit Australia		15%	11%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Street food (n=3,067)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

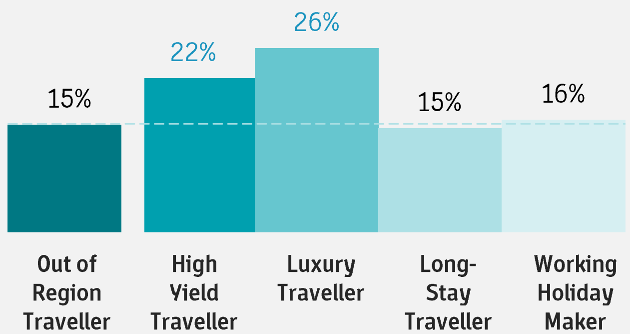
FINE DINING/RENOWNED CHEFS

SENSORY • POPULAR EXPERIENCES • DINING OUT

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 15% of Out of Region Travellers are interested in fine dining or renowned chefs when they travel, with higher interest among higher-yielding segments
- Demand for this experience ranges from 8% of Italians to 22% of Canadian travellers
- Those interested in fine dining tend to be slightly older, with higher incomes

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	15%	17,421
Canada	22%	1,330
South Korea	20%	1,994
USA	20%	5,346
Singapore	19%	291
Philippines	18%	514
Vietnam	18%	388
New Zealand	17%	129
Japan	16%	1,267
UK	16%	1,542
India	16%	571
Hong Kong	15%	189
Germany	15%	855
Malaysia	14%	237
Taiwan	14%	365
France	10%	767
Indonesia	10%	135
China	9%	2,727
Thailand	9%	191
Italy	8%	251
AUSTRALIANS	20%	1,731

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	33%
	Older Singles/Couples (45+)	16%	17%
	Young Families	32%	32%
	Older Families	16%	18%
AGE	18-29	30%	26%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	25%
	Average age	38	39
GENDER	Male	50%	50%
	Female	50%	50%
INCOME	Low	25%	20%
	Middle	28%	26%
	High	24%	27%
	Very high	22%	27%
TRAVELLER MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	15%
	Exploration	17%	16%
	Adventure	14%	13%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	9%
Consideration of Australia		37%	34%
Actively planning to visit Australia		15%	13%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Fine dining/renowned chefs (n=1,307)

● Significantly higher than those not interested ● Significantly lower than those not interested

TOURISM AUSTRALIA

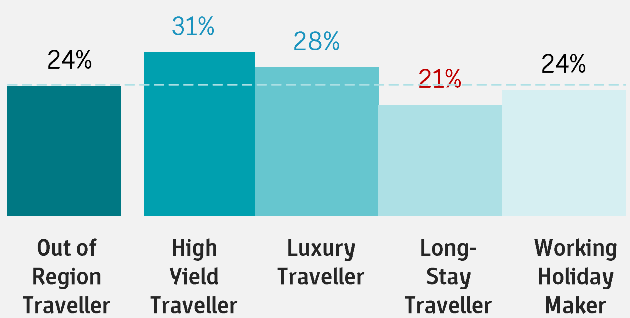
CASUAL OR MID-RANGE DINING

SENSORY • POPULAR EXPERIENCES • DINING OUT

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost a quarter of Out of Region Travellers are interested in casual or mid-range dining options when they travel, with higher interest among higher-yielding segments
- Demand for this experience is higher among several developed markets
- Those interested in casual or mid-range dining skew older, particularly singles/couples, and are more likely to be motivated by reconnection and restoration needs
- This audience has lower consideration and intention to visit Australia for a holiday in the near term

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	24%	28,236
Canada	36%	2,205
New Zealand	33%	250
Japan	33%	2,626
Germany	32%	1,776
Taiwan	28%	770
USA	28%	7,468
Hong Kong	28%	351
Singapore	28%	432
UK	27%	2,645
Philippines	27%	763
Malaysia	27%	454
Thailand	23%	490
France	23%	1,696
Vietnam	19%	402
Indonesia	18%	241
India	15%	567
South Korea	15%	1,475
China	13%	3,867
Italy	9%	289
AUSTRALIANS	34%	2,964

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	25%
	Young Families	32%	24%
	Older Families	16%	17%
AGE	18-29	30%	23%
	30-39	26%	23%
	40-49	22%	23%
	50-64	22%	31%
	Average age	38	41
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	25%
	Middle	28%	29%
	High	24%	24%
	Very high	22%	22%
TRAVELLER MOTIVATIONS	Reconnection	17%	23%
	Into Nature	17%	15%
	Exploration	17%	17%
	Adventure	14%	11%
	Transformation	13%	11%
	Passion, hobbies	14%	13%
	Restoration	7%	10%
Consideration of Australia		37%	31%
Actively planning to visit Australia		15%	11%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Casual or mid-range dining (n=2,093)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

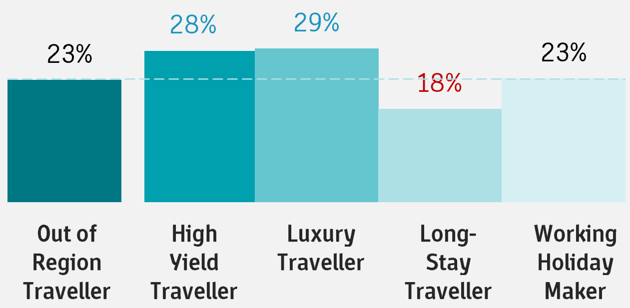
RANGE OF MULTICULTURAL FOOD OPTIONS

SENSORY • POPULAR EXPERIENCES • DINING OUT

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 23% of Out of Region Travellers are specifically interested in multicultural dining options when travelling
- Higher-yielding audiences have greater demand for this form of dining
- Several Eastern markets, as well as Australians and New Zealanders, have significantly higher interest in multicultural dining
- Those interested in multicultural dining skew older, particularly singles/couples, and more likely to travel for reconnection or restoration
- This audience is less likely to be considering or actively planning to visit Australia for a holiday in the near term

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	23%	26,475
Taiwan	37%	996
Hong Kong	36%	443
Philippines	34%	939
Malaysia	33%	545
New Zealand	28%	210
Indonesia	26%	353
Thailand	26%	546
Germany	24%	1,355
Vietnam	23%	488
UK	22%	2,087
Canada	21%	1,289
India	21%	756
Singapore	20%	308
China	20%	5,648
USA	19%	5,102
Japan	18%	1,423
South Korea	18%	1,741
Italy	10%	312
France	8%	576
AUSTRALIANS	27%	2,345

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	32%
	Older Singles/Couples (45+)	16%	21%
	Young Families	32%	29%
	Older Families	16%	18%
AGE	18-29	30%	25%
	30-39	26%	25%
	40-49	22%	22%
	50-64	22%	28%
	Average age	38	40
GENDER	Male	50%	45%
	Female	50%	55%
INCOME	Low	25%	25%
	Middle	28%	29%
	High	24%	25%
	Very high	22%	21%
TRAVELLER MOTIVATIONS	Reconnection	17%	22%
	Into Nature	17%	17%
	Exploration	17%	18%
	Adventure	14%	9%
	Transformation	13%	12%
	Passion, hobbies	14%	12%
	Restoration	7%	9%
Consideration of Australia		37%	34%
Actively planning to visit Australia		15%	12%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Range of multicultural food options (n=1,926)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

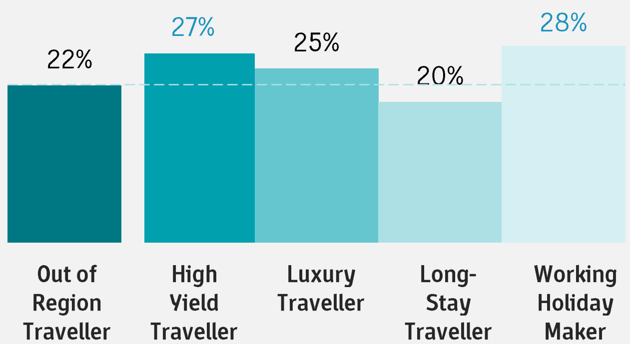
FRESH PRODUCE

SENSORY • POPULAR EXPERIENCES • DINING OUT

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 22% of Out of Region Travellers are specifically interested in dining out on fresh produce when they travel, with higher interest among High Yield Travellers and Working Holiday Makers
- Those interested in fresh produce skew older, with reconnection as their primary travel motivation
- This audience is less likely to be considering or actively planning to visit Australia for a holiday in the near term

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	22%	25,525
Thailand	31%	660
Philippines	30%	831
Malaysia	29%	489
Canada	25%	1,561
Indonesia	25%	340
UK	25%	2,382
France	24%	1,768
Singapore	24%	366
USA	23%	6,125
New Zealand	23%	171
India	23%	834
Vietnam	22%	471
Hong Kong	19%	242
Taiwan	19%	511
Germany	19%	1,063
China	18%	5,048
Japan	18%	1,385
Italy	13%	393
South Korea	12%	1,154
AUSTRALIANS	26%	2,285

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	30%
	Older Singles/Couples (45+)	16%	20%
	Young Families	32%	31%
	Older Families	16%	19%
AGE	18-29	30%	24%
	30-39	26%	25%
	40-49	22%	23%
	50-64	22%	29%
	Average age	38	41
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	25%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	22%
TRAVELLER MOTIVATIONS	Reconnection	17%	20%
	Into Nature	17%	19%
	Exploration	17%	17%
	Adventure	14%	12%
	Transformation	13%	13%
	Passion, hobbies	14%	11%
	Restoration	7%	8%
Consideration of Australia		37%	32%
Actively planning to visit Australia		15%	12%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Fresh produce (n=1,875)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

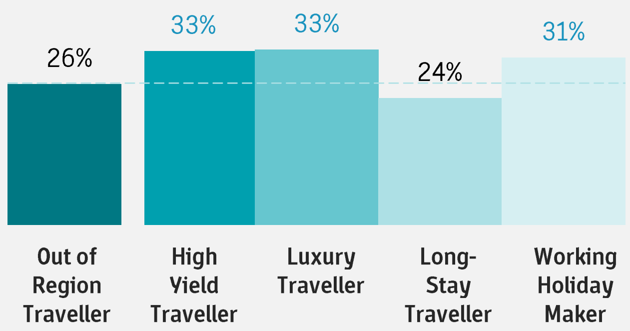
FRESH SEAFOOD

SENSORY • POPULAR EXPERIENCES • DINING OUT

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, around a quarter of Out of Region Travellers are specifically interest in dining on fresh seafood, with greater demand from higher-yielding segments and Working Holiday Makers
- Demand for this experience varies widely by market, from 11% of Italians to 39% of Malaysians
- Those interested in fresh seafood tend to be older, slightly more affluent, and more likely to travel for reconnection or restoration
- This audience is less likely to be considering or actively planning to visit Australia for a holiday in the near term

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	26%	30,497
Malaysia	39%	644
Hong Kong	38%	470
Vietnam	34%	725
Indonesia	34%	459
Philippines	33%	924
Singapore	31%	473
Taiwan	30%	807
Canada	29%	1,808
Thailand	28%	600
USA	28%	7,402
South Korea	27%	2,667
Japan	25%	2,002
India	25%	904
New Zealand	21%	157
UK	20%	1,978
China	18%	5,241
Germany	18%	1,013
France	15%	1,112
Italy	11%	344
AUSTRALIANS	24%	2,065

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	28%
	Older Singles/Couples (45+)	16%	21%
	Young Families	32%	30%
	Older Families	16%	21%
AGE	18-29	30%	22%
	30-39	26%	23%
	40-49	22%	24%
	50-64	22%	30%
	Average age	38	41
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	23%
	Middle	28%	29%
	High	24%	27%
	Very high	22%	21%
TRAVELLER MOTIVATIONS	Reconnection	17%	20%
	Into Nature	17%	18%
	Exploration	17%	16%
	Adventure	14%	12%
	Transformation	13%	13%
	Passion, hobbies	14%	11%
	Restoration	7%	10%
Consideration of Australia		37%	32%
Actively planning to visit Australia		15%	12%

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Fresh seafood (n=2,215)

Significantly higher than those not interested

Significantly lower than those not interested

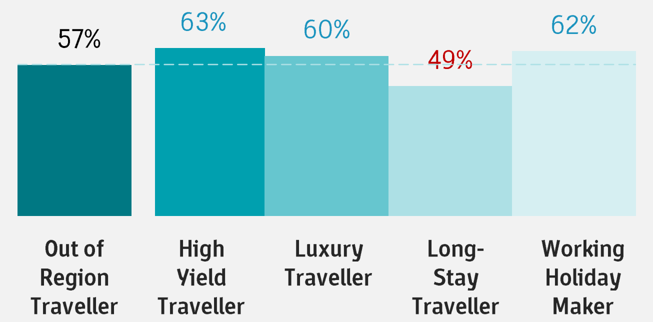
BEACHES

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Beaches are the 2nd most popular experience at a global level, and the leading experience in Continental Europe and China
- Those interested in beaches are primarily motivated to travel for reconnection and exploration
- This audience has higher income levels
- Key cross-sell opportunities feature nature, wildlife and aquatic pursuits – exploring wilderness or nature, wildlife observations and encounters (including marine life), cruises and water sports

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	18%
	Exploration	17%	19%
	Adventure	14%	12%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	7%
Consideration of Australia		37%	42%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	57%	2	70,214
Germany	65%	1	3,685
France	56%	1	4,169
Italy	64%	1	1,992
China	48%	1	13,902
UK	61%	2	5,869
Indonesia	65%	2	890
USA	61%	2	16,042
Canada	65%	2	4,013
New Zealand	61%	2	457
Philippines	63%	4	1,773
India	57%	4	2,078
Malaysia	55%	4	918
Japan	51%	4	4,062
Vietnam	57%	6	1,229
South Korea	56%	7	5,502
Thailand	54%	7	1,146
Singapore	47%	8	731
Taiwan	46%	16	1,249
Hong Kong	41%	18	505
AUSTRALIANS	60%	2	5,294

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Beaches e.g. swimming, relaxing, rock pools (n=12,562)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

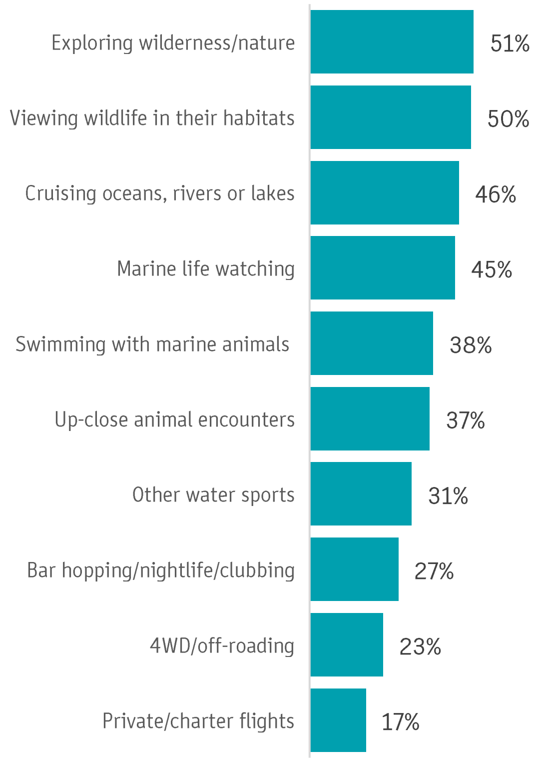
BEACHES

SENSORY • POPULAR EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	33%
	Older Families	16%	17%
AGE	18-29	30%	29%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	22%
	Average age	38	38
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	23%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Helps unwind surrounded by water and nature. The epitome of "vacation" as deemed the perfect way to unwind: R&R
• Especially appealing for those who live in urban areas far from beaches. • Mixture of relaxation on the beach, proximity to nature/ocean, and availability of water activities provides a balanced holiday with something for every travel partner

WHY SOME DO NOT

• Some steer clear due to harmful effects of the sun, dislike water activities/inability to swim
• Travellers with easy access to beaches at home make this type of trip make it less motivating

HERO DESTINATIONS

• Fiji, Roro Tonga, Hawaii, Bali, Hawaii, Mexico, Indonesia, Thailand, Australia, the Caribbean

Anywhere where there is a beach, sunshine and great cocktails. We've been on many beach holidays together and always had the best time, laughing and bonding, looking at the waves, getting tipsy on Aperol Spritz

HIGH YIELD TRAVELLER, UNITED KINGDOM

The sand is so soft under my feet, the air is salty and fresh, the water is warm and inviting, and I'm having the best time just relaxing and enjoying time with my family

HIGH YIELD TRAVELLER, UNITED STATES

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Beaches e.g. swimming, relaxing, rock pools (n=12,562)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

SENSORY

WELLNESS

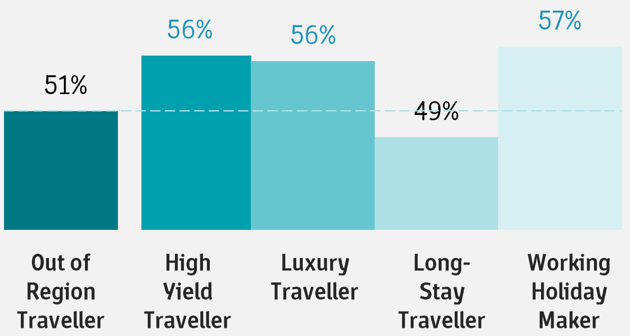
HOT SPRINGS

SENSORY • WELLNESS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Hot springs are the 5th most popular experience at a global level, and ranked as high as 2nd in appeal in Greater China
- This experience is of interest to more than half of High Yield Travellers, Luxury Travellers, Working Holiday Makers, and travellers from several Asian markets and New Zealand
- Those interested in hot springs tend to be motivated by reconnection, exploration and getting into nature when they travel
- Diverse cross-sell and packaging opportunities include spa treatments, auroras and stargazing, carnivals and snorkelling

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	18%
	Exploration	17%	18%
	Adventure	14%	13%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	7%
Consideration of Australia		37%	42%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	51%	5	59,775
Taiwan	71%	2	1,916
China	45%	2	12,996
Hong Kong	68%	2	845
Japan	52%	3	4,077
Singapore	59%	3	913
South Korea	59%	4	5,776
New Zealand	56%	4	419
Vietnam	58%	5	1,240
USA	46%	5	12,094
France	43%	6	3,170
Philippines	62%	6	1,721
Italy	50%	7	1,547
Canada	48%	7	2,995
UK	43%	8	4,153
Germany	40%	10	2,235
Thailand	50%	11	1,063
Malaysia	41%	16	689
Indonesia	44%	16	605
India	36%	24	1,320
AUSTRALIANS	46%	7	4,036

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Hot springs (n=11,093)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

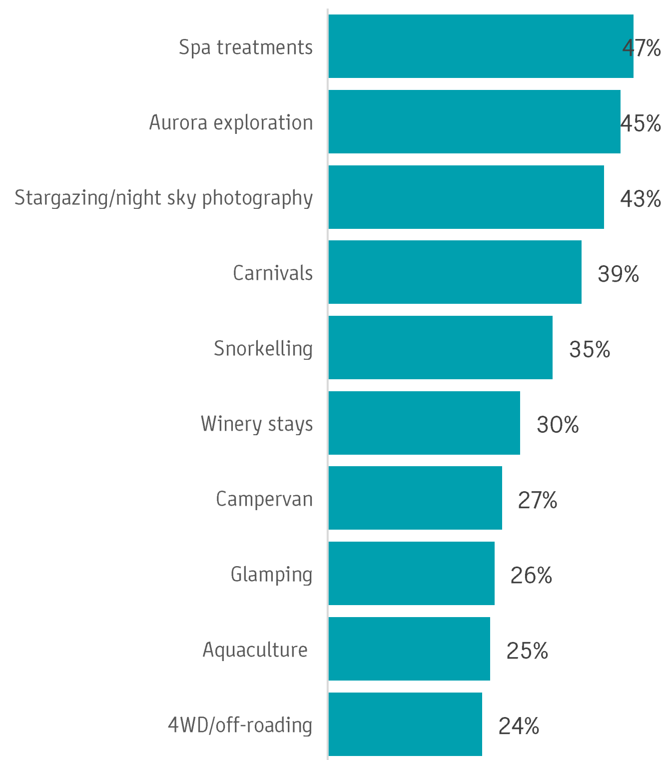
HOT SPRINGS

SENSORY • WELLNESS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	31%
	Older Families	16%	16%
AGE	18-29	30%	30%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	22%
	Average age	38	38
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Holistic way to unwind and endows a deep state of relaxation
- Combination of experiencing a unique natural landscape and physical and mental therapeutic benefits

WHY SOME DO NOT

- Most would consider

HERO DESTINATIONS

- Countries where bathing is an integral part of the domestic culture
- Japan Onsen
- Budapest Széchenyi Baths
- Iceland Blue Lagoon
- New Zealand mud baths

The soaking the stress away in a natural spring and perhaps live music in the background for the better
HIGH YIELD TRAVELLER, UNITED STATES

Everyone does this when they travel, the minerals are great for your skin and it's healthy for ailments
HIGH YIELD TRAVELLER, JAPAN

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Hot springs (n=11,093)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

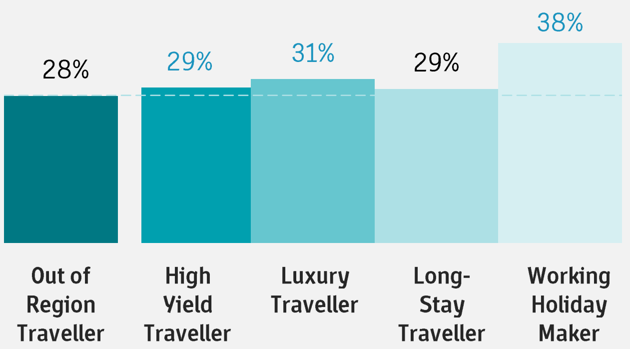
WELLNESS RETREAT

SENSORY • WELLNESS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, over a quarter of Out of Region travellers are interested in wellness retreats, with particularly strong appeal from South Korea
- This experience represents a strong yield opportunity, attracting audiences with higher incomes
- This audience skews heavily female, tend to be younger age groups (under 40), and are more likely to seek transformation as a motivation to travel
- Opportunity to cross-sell or package with Indigenous experiences (craft workshops or storytelling), workcations and experiential learning

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE

	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	17%
	Exploration	17%	18%
	Adventure	14%	13%
	Transformation	13%	17%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	43%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	28%	45	33,223
South Korea	42%	17	4,117
Germany	35%	20	1,969
Vietnam	40%	24	850
India	36%	26	1,303
UK	27%	36	2,625
Singapore	27%	36	412
France	24%	37	1,787
Italy	28%	40	869
China	24%	42	6,785
Philippines	36%	42	1,009
Hong Kong	25%	45	317
New Zealand	28%	46	209
Canada	24%	49	1,453
USA	24%	50	6,409
Thailand	28%	50	590
Japan	18%	50	1,393
Taiwan	19%	68	510
Indonesia	22%	69	300
Malaysia	19%	74	316
AUSTRALIANS	27%	45	2,354

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Wellness retreat e.g. meditation, yoga, nutrition, mindfulness (n=6,099)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

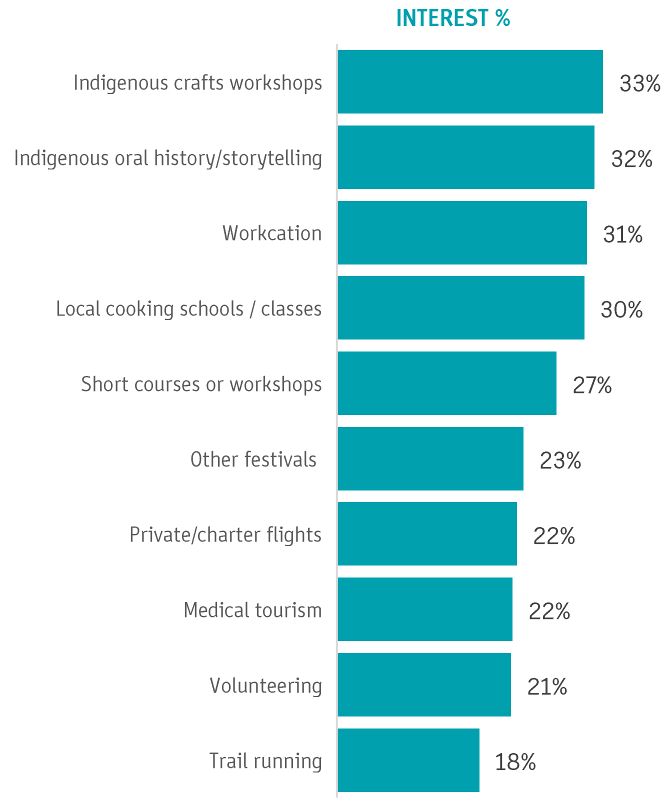
WELLNESS RETREAT

SENSORY • WELLNESS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	33%
	Older Families	16%	17%
AGE	18-29	30%	32%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	20%
	Average age	38	37
GENDER	Male	50%	41%
	Female	50%	59%
INCOME	Low	25%	23%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Passionate about yoga, meditation or wants to deepen practice
- Opportunity to connect with like-minded people
- Unique way to practice passion in the place of origin

WHY SOME DO NOT

- Cost conscious
- Too much effort, strenuous or physically demanding on holiday
- Not interested in wellness activities

HERO DESTINATIONS

- Place of origin of the activity e.g., yoga in India
- Locations with idyllic retreats surrounded by nature e.g., Costa Rica, Indonesia

My wife again - we're travelling to Costa Rica together and are both the same skill level when it comes to surfing and yoga

HIGH YIELD TRAVELLER, UNITED KINGDOM

It would be hard to justify going all the way there if it was just for a meditation retreat but if there were other plans, absolutely

HIGH YIELD TRAVELLER, NEW ZEALAND

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Wellness retreat e.g. meditation, yoga, nutrition, mindfulness (n=6,099)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

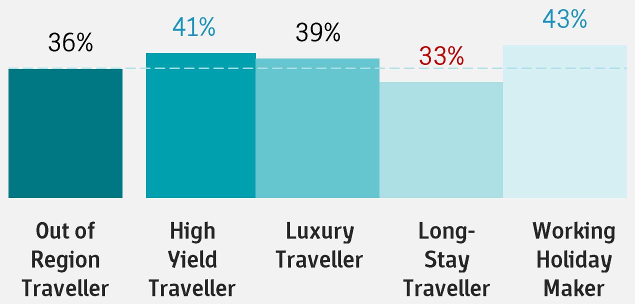
SPA TREATMENTS

SENSORY • WELLNESS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall more than a third are interested in spa treatments, with strongest interest levels in the Italian, Japanese, Hong Kong and New Zealand markets
- Those interested in spa treatments skew heavily female and towards higher income levels
- Diverse cross-sell opportunities include artisan food workshops, wellness retreats, dance or music festivals, winery stays and nightlife

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	19%
	Into Nature	17%	16%
	Exploration	17%	18%
	Adventure	14%	13%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	7%
Consideration of Australia		37%	43%
Actively planning to visit Australia		15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	36%	19	42,577
Japan	43%	9	3,399
UK	41%	11	4,007
Italy	46%	12	1,438
Hong Kong	43%	12	540
Singapore	39%	14	610
New Zealand	43%	14	320
Germany	38%	15	2,125
Canada	38%	18	2,359
USA	36%	20	9,629
Malaysia	39%	21	648
France	31%	21	2,312
India	38%	23	1,378
Philippines	43%	25	1,210
South Korea	32%	31	3,131
China	25%	36	7,105
Vietnam	32%	44	679
Taiwan	27%	48	723
Indonesia	29%	50	395
Thailand	27%	52	568
AUSTRALIANS	38%	18	3,307

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Spa treatments (n=8,128)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

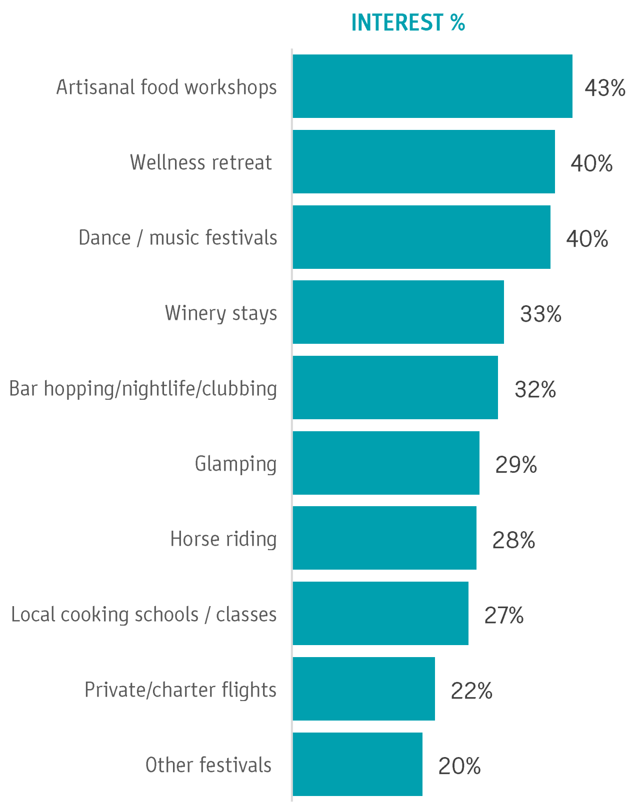
SPA TREATMENTS

SENSORY • WELLNESS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	15%
	Young Families	32%	33%
	Older Families	16%	16%
AGE	18-29	30%	31%
	30-39	26%	27%
	40-49	22%	22%
	50-64	22%	20%
	Average age	38	38
GENDER	Male	50%	41%
	Female	50%	59%
INCOME	Low	25%	24%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Opportunity to switch into holiday mindset, pamper yourself, get away from distractions, feel relaxed and rejuvenated (core vacation needs)
- A form of self-care – escape from busy life, relieve tension and fatigue, nourish your body (treating yourself)

WHY SOME DO NOT

- Something you can do at home. Some HYTs with young children would prioritize family-oriented activities over this experience
- Cost can be expensive for some

HERO DESTINATIONS

- Thailand for affordable spa/massage experiences
- Indonesia e.g. Bali
- India or Sri Lanka for Ayurvedic treatments
- Hawaii
- Any bucket list destination with a hotel spa

"Travel itself is a piling up of fatigue, so it's nice to have a spa to relieve fatigue and have a rest towards the end of the trip

HIGH YIELD TRAVELLER, SOUTH KOREA

Anyone who has been to Thailand knows what wellness means and how nice it can be. Here it also costs little and then I booked it on the spot for each day

HIGH YIELD TRAVELLER, GERMANY"

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Spa treatments (n=8,128)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

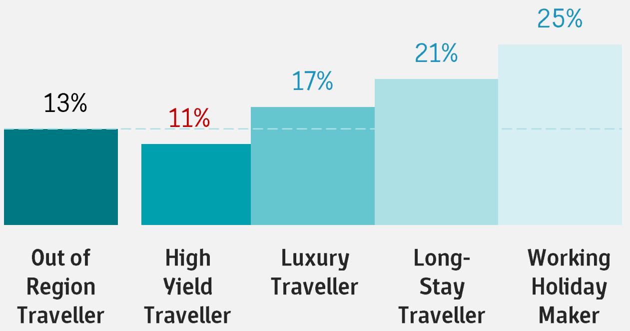
MEDICAL TOURISM

SENSORY • WELLNESS

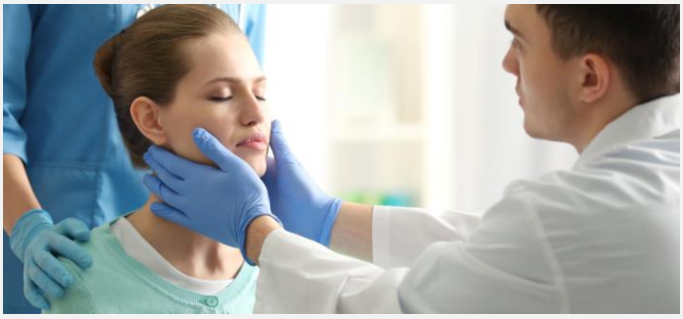
https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Just over 1 in 10 are interested in medical tourism overall, with greater interest among Luxury Travellers, Long-Stay Travellers and Working Holiday Makers
- Interest in medical tourism varies widely by market, with greatest interest levels in emerging markets of Thailand and Vietnam, while this experience ranks last out of the 89 tested in all Western markets, as well as Japan
- Those interested in this experience tend to be aged under 40, in family lifestages, and earn higher incomes
- Cross-sell opportunities include homestays with local families, sailing, religious events or festivals, and short courses or workshops

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	13%
	Into Nature	17%	19%
	Exploration	17%	13%
	Adventure	14%	17%
	Transformation	13%	19%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	22%



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	13%	86	14,145
Thailand	45%	16	943
Vietnam	42%	19	904
China	15%	73	4,296
Philippines	18%	85	494
India	17%	85	609
Malaysia	14%	86	233
Indonesia	14%	87	189
Hong Kong	10%	87	128
Taiwan	7%	87	198
Italy	7%	88	209
Singapore	10%	88	153
South Korea	6%	88	541
USA	10%	89	2,644
Germany	6%	89	357
Japan	6%	89	467
Canada	7%	89	418
New Zealand	8%	89	61
UK	9%	89	861
France	6%	89	440
AUSTRALIANS	9%	89	793

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Medical tourism (n=2,792)

Significantly higher than those not interested · *Significantly lower than those not interested*

TOURISM AUSTRALIA

MEDICAL TOURISM

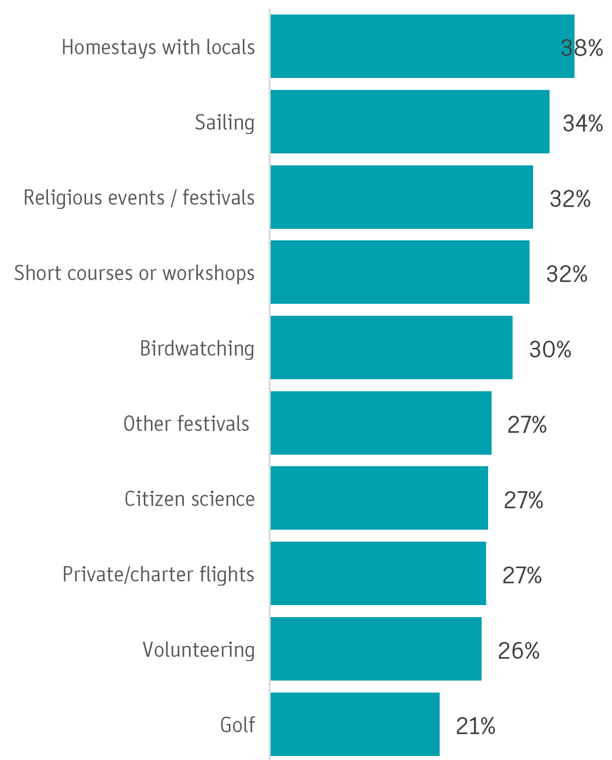
SENSORY • WELLNESS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	31%
	Older Singles/Couples (45+)	16%	8%
	Young Families	32%	41%
	Older Families	16%	20%
AGE	18-29	30%	34%
	30-39	26%	28%
	40-49	22%	21%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	50%
	Female	50%	50%
INCOME	Low	25%	25%
	Middle	28%	24%
	High	24%	27%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)

INTEREST %



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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Medical tourism (n=2,792)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

SENSORY

THE ARTS

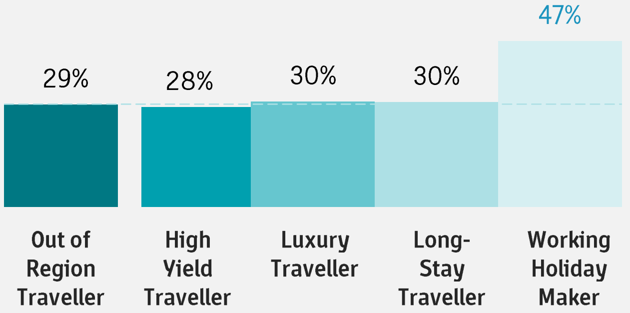
DANCE / MUSIC FESTIVALS

SENSORY • THE ARTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average almost 3 in 10 Out of Region Travellers are interested in dance or music festivals, with greatest interest among Working Holiday Makers
- This experience ranked 40th in interest at a global level, but as high as 16th in the Indian market
- Those interested in dance/music festivals tend to be younger singles or couples, predominantly aged under 30, with a heavy skew towards females
- Opportunities to cross-sell with other arts-based experiences, including carnivals, theatre and Indigenous performance, as well as nightlife

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	15%
	Transformation	13%	13%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	29%	40	33,925
India	42%	16	1,545
Philippines	44%	23	1,227
Canada	30%	30	1,864
USA	29%	31	7,743
South Korea	29%	34	2,796
Germany	27%	34	1,548
Malaysia	34%	34	568
UK	27%	34	2,631
Indonesia	36%	34	491
France	24%	38	1,764
Vietnam	33%	40	707
Italy	26%	43	814
China	23%	43	6,583
New Zealand	28%	44	212
Japan	20%	44	1,593
Singapore	24%	50	370
Thailand	28%	51	586
Taiwan	24%	56	646
Hong Kong	19%	66	238
AUSTRALIANS	26%	46	2,304

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Dance / music festivals (n=6,394)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

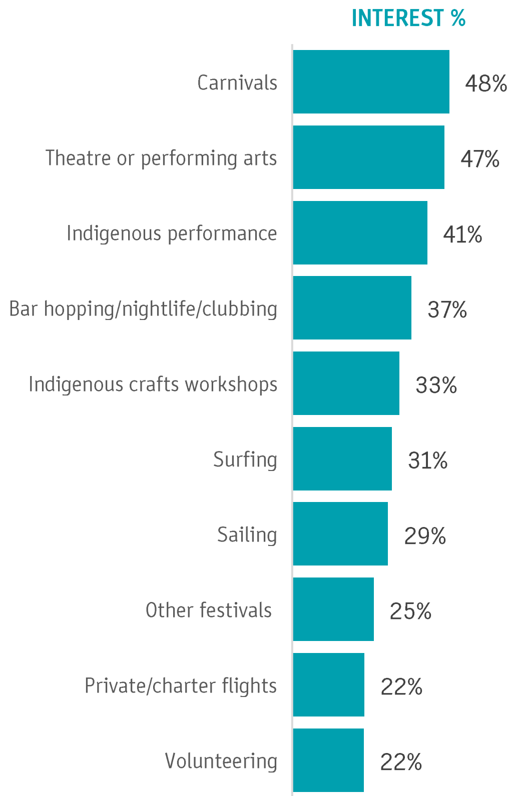
DANCE / MUSIC FESTIVALS

SENSORY • THE ARTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	41%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	32%
	Older Families	16%	15%
AGE	18-29	30%	37%
	30-39	26%	27%
	40-49	22%	19%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	43%
	Female	50%	57%
INCOME	Low	25%	26%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- High, fun level of energy

WHY SOME DO NOT

- Feeling cautious around large crowds due to COVID

I just love the energy at festivals and listening to music on big sound systems while outdoors always gets me.

HIGH YIELD TRAVELLER, NEW ZEALAND

Dance/music is not my scene and too many people (thinking Covid here a bit)

HIGH YIELD TRAVELLER, UNITED STATES

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Dance / music festivals (n=6,394)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

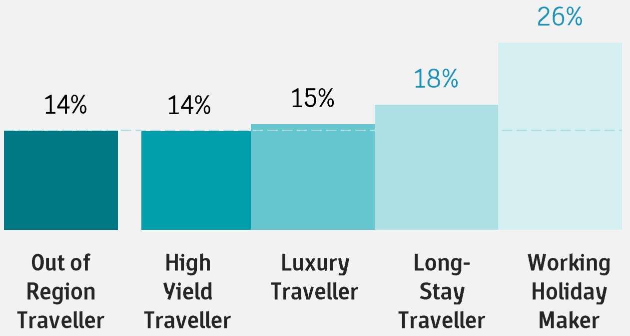
OTHER FESTIVALS

SENSORY • THE ARTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 14% of Out of Region Travellers are interested in other festivals such as comedy or writing festivals
- Demand is strongest among Working Holiday Makers, a quarter of whom are interested in other festivals
- This experience is more niche, with around 17 million travellers interested across 19 markets, and ranking 84th out of 89 experiences tested at a global level (peaking at 75th in New Zealand and Canada)
- Those interested in other festivals tend to be younger, female, and travel for transformation or to engage in passions or hobbies
- Cross-sell opportunities include Indigenous craft workshops and storytelling, short courses and personal journey (religion or ancestry)

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	15%
	Exploration	17%	18%
	Adventure	14%	16%
	Transformation	13%	16%
	Passion, hobbies	14%	16%
	Restoration	7%	5%
Consideration of Australia		37%	48%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	14%	84	16,966
New Zealand	18%	75	135
Canada	16%	75	960
Vietnam	21%	76	446
USA	16%	76	4,205
China	14%	76	4,095
Germany	13%	79	761
Thailand	15%	80	307
UK	15%	81	1,412
Malaysia	17%	81	279
Italy	12%	81	373
Japan	9%	81	744
Hong Kong	12%	82	153
Philippines	18%	84	510
Taiwan	11%	84	299
France	8%	85	588
South Korea	7%	85	732
Indonesia	15%	86	198
India	17%	86	607
Singapore	11%	87	163
AUSTRALIANS	18%	69	1,538

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Other festivals e.g. writing, comedy (n=3,124)

Significantly higher than those not interested (blue)

Significantly lower than those not interested (red)

TOURISM AUSTRALIA

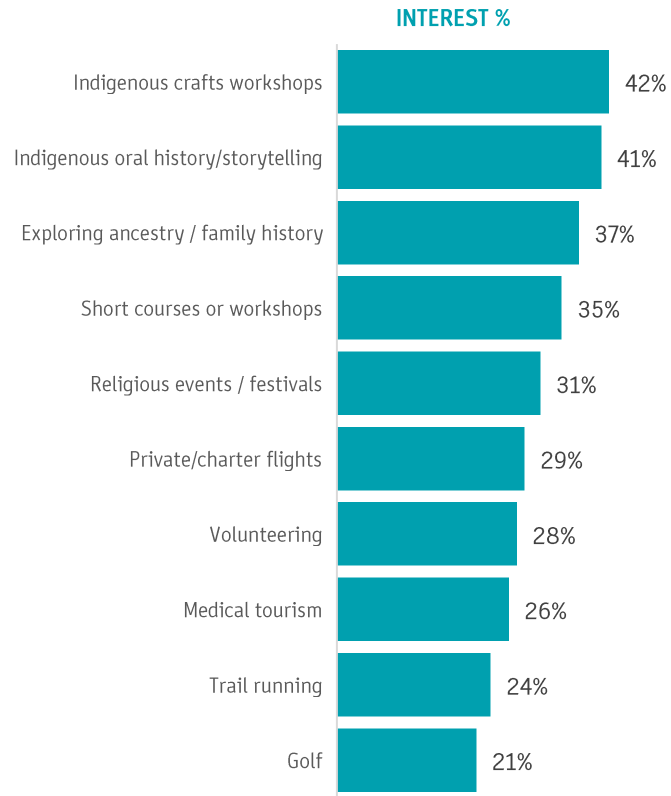
OTHER FESTIVALS

SENSORY • THE ARTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	41%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	35%
	Older Families	16%	13%
AGE	18-29	30%	39%
	30-39	26%	28%
	40-49	22%	19%
	50-64	22%	15%
	Average age	38	35
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	26%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



I enjoy writing but I have no interest in going to a festival dedicated to writing.

HIGH YIELD TRAVELLER, UNITED STATES

I love great comedy and especially enjoy comedy festivals. I think of fun places... Miami, Las Vegas, New York, Los Angeles... these are places where comedy is king.

HIGH YIELD TRAVELLER, UNITED STATES

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Other festivals e.g. writing, comedy (n=3,124)

● *Significantly higher than those not interested* (blue)

● *Significantly lower than those not interested* (red)

TOURISM AUSTRALIA

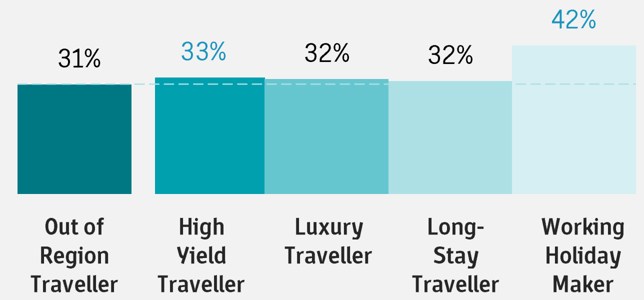
CARNIVALS

SENSORY • THE ARTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Around 3 in 10 are interest in carnivals at a global level, with greatest interest from the Working Holiday Maker segment
- Carnivals are more appealing to several Asian markets, and least appealingg to Continental Europe and Japan
- Those interested in carnivals tend to be younger (18-40), with a slight skew towards females
- Cross-sell opportunities include other arts-based experiences such as dance/musical festivals, theatre and Indigenous performance, as well as bar hopping, clubs and nightlife

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	17%
	Exploration	17%	18%
	Adventure	14%	14%
	Transformation	13%	12%
	Passion, hobbies	14%	15%
	Restoration	7%	6%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	31%	33	34,387
Indonesia	41%	19	557
Hong Kong	40%	19	494
Taiwan	44%	21	1,198
Thailand	40%	22	842
Malaysia	36%	25	606
China	26%	28	7,498
Singapore	32%	29	496
Canada	31%	29	1,906
UK	30%	30	2,854
India	35%	31	1,282
New Zealand	33%	31	244
USA	29%	32	7,723
Philippines	39%	34	1,092
South Korea	25%	44	2,418
Japan	19%	47	1,500
France	20%	48	1,510
Italy	22%	53	687
Vietnam	28%	60	592
Germany	16%	69	890
AUSTRALIANS	30%	33	2,622

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Carnivals (n=6,750)

Significantly higher than those not interested *Significantly lower than those not interested*

TOURISM AUSTRALIA

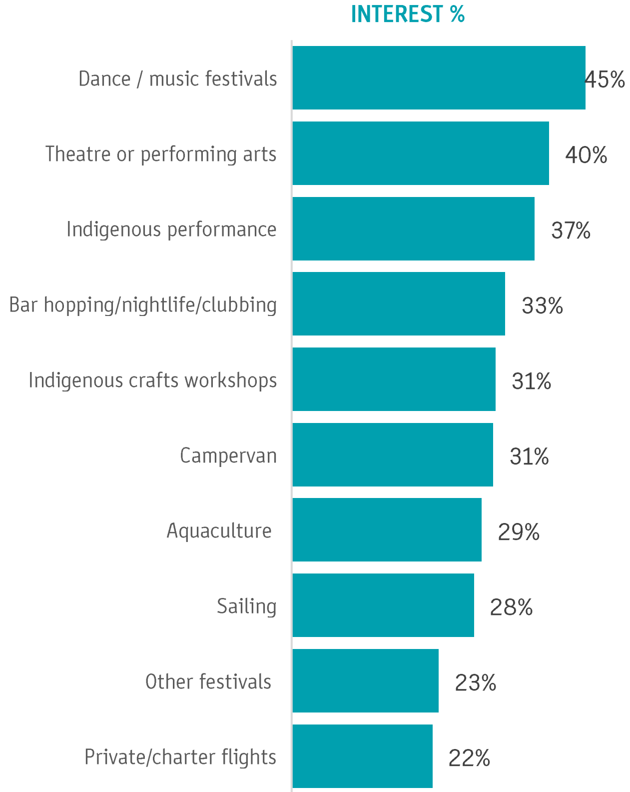
CARNIVALS

SENSORY • THE ARTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	34%
	Older Families	16%	16%
AGE	18-29	30%	32%
	30-39	26%	27%
	40-49	22%	21%
	50-64	22%	20%
	Average age	38	37
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	26%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Immersive way to experience the culture of a place
- Combination of activities offers something for everyone e.g., food, music, arts and crafts, etc.
- Energetic and celebratory atmosphere is fun

WHY SOME DO NOT

- Safety concerns for large gatherings
- Too chaotic and overwhelming for some

HERO DESTINATIONS

- Destinations with famous festivals and carnivals e.g., Samba Festival, La Tomatina, Mardi Gras
- Brazil, Trinidad

The fun, colour, culture and usually music. I like parades or events on the street. Looks like crazy fun

HIGH YIELD TRAVELLER, NEW ZEALAND

Carnivals are just chaotic hubs of fun. Food, drink, dancing, lots of interesting people and usually an event to celebrate

HIGH YIELD TRAVELLER, UNITED KINGDOM

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Carnivals (n=6,750)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

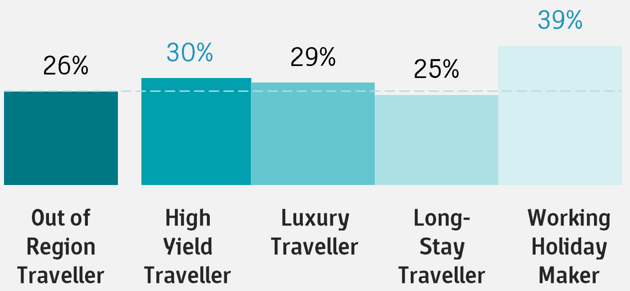
THEATRE, CONCERTS OR PERFORMING ARTS

SENSORY • THE ARTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Around a quarter are interested in theatre, concerts or performing arts, with greatest interest among Working Holiday Makers
- Wide variation in interest by market, from 17% of the French market interested to more than a third in Canada and South Korea
- Those interested in this experience tend to be young (18-29), without children, with a heavy female skew, and most likely to travel to fulfil exploration needs
- Cross-sell opportunities include festivals (dance/music and other), a range of Indigenous experiences, sports events and war history

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	15%
	Exploration	17%	20%
	Adventure	14%	13%
	Transformation	13%	13%
	Passion, hobbies	14%	15%
	Restoration	7%	6%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	26%	48	32,834
Canada	34%	24	2,077
Japan	29%	26	2,320
South Korea	35%	26	3,378
UK	29%	32	2,795
New Zealand	32%	33	242
USA	29%	34	7,639
Taiwan	30%	39	820
Indonesia	31%	46	418
Singapore	24%	48	373
China	22%	48	6,307
Hong Kong	24%	49	301
Germany	20%	52	1,129
Italy	22%	54	679
India	29%	57	1,058
France	17%	59	1,257
Malaysia	25%	59	421
Vietnam	24%	71	507
Philippines	27%	72	743
Thailand	18%	77	370
AUSTRALIANS	30%	35	2,608

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Theatre, concerts or performing arts (n=5,945)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

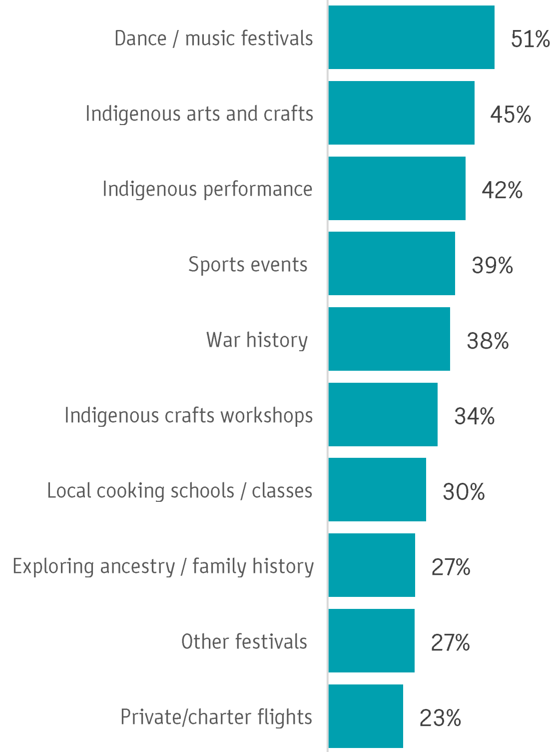
THEATRE, CONCERTS OR PERFORMING ARTS

SENSORY • THE ARTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	41%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	29%
	Older Families	16%	14%
AGE	18-29	30%	35%
	30-39	26%	25%
	40-49	22%	21%
	50-64	22%	20%
	Average age	38	37
GENDER	Male	50%	43%
	Female	50%	57%
INCOME	Low	25%	25%
	Middle	28%	27%
	High	24%	24%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Aligns with their personal passions & interests

WHY SOME DO NOT

- Too niche an interest- doesn't align with personal interests

HERO DESTINATIONS

- Broadway - New York

I LOVE THEATRE. I love to see local small town theatre, city theatre and have experienced a small amount of big world theatre.

HIGH YIELD TRAVELLER, NEW ZEALAND

Theatre, comedy festivals etc are the sort of thing I'd likely do at home, without being on holiday, but more because somebody suggested doing it and less because I sought it out

HIGH YIELD TRAVELLER, NEW ZEALAND

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Theatre, concerts or performing arts (n=5,945)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

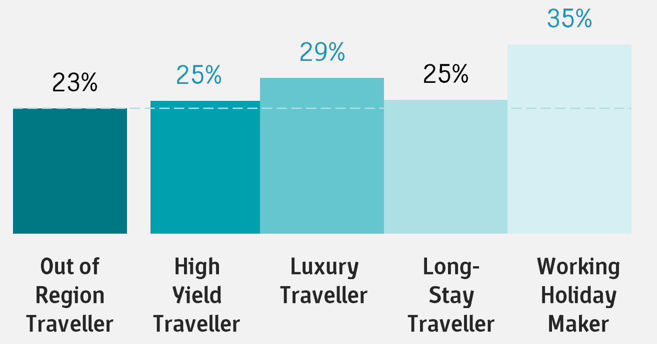
INDIGENOUS PERFORMANCE

SENSORY • THE ARTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- At a global level, just under a quarter are interested in Indigenous performance, with greater interest from higher-yielding segments and particularly Working Holiday Makers
- Those interested in Indigenous performance skew female, slightly younger, family lifestages, and tend to have higher incomes
- This audience tends to travel to fulfil exploration needs, and have very high consideration and intention for Australia
- Important to be aware of perceived cultural risks as traveller barriers, and avoid being seen as tokenistic or exploitative
- Cross-sell opportunities include a range of other Indigenous experiences across sectors, as well as other arts-based experiences

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	17%
	Exploration	17%	20%
	Adventure	14%	14%
	Transformation	13%	13%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	23%	59	27,649
China	25%	35	7,160
Vietnam	34%	39	718
Indonesia	32%	42	442
Malaysia	28%	48	468
Thailand	29%	48	605
New Zealand	26%	52	196
Taiwan	25%	53	681
USA	22%	54	5,880
Hong Kong	22%	55	274
France	18%	56	1,304
Canada	21%	57	1,312
UK	20%	58	1,956
India	29%	58	1,050
South Korea	19%	58	1,883
Philippines	29%	58	815
Japan	16%	59	1,296
Singapore	20%	65	316
Italy	15%	73	477
Germany	14%	74	816
AUSTRALIANS	21%	60	1,859

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Indigenous performance e.g. dance, theatre (n=5,177)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

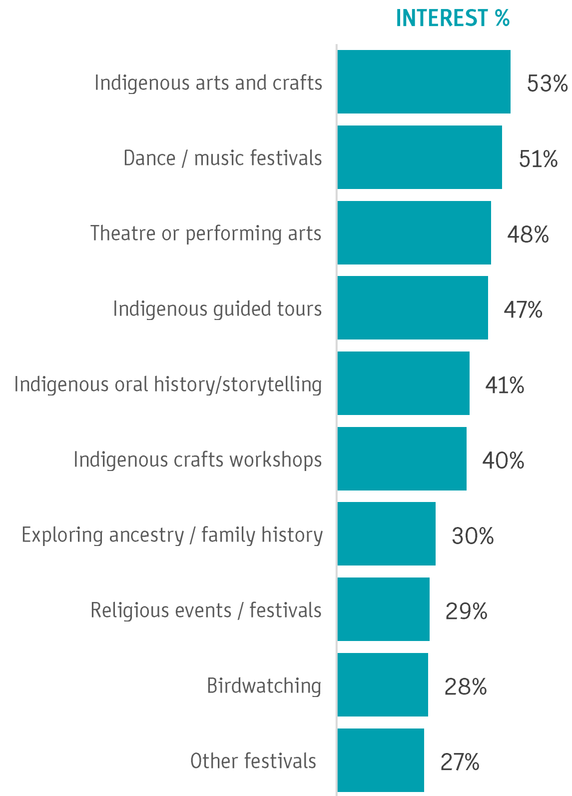
INDIGENOUS PERFORMANCE

SENSORY • THE ARTS

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	35%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	34%
	Older Families	16%	18%
AGE	18-29	30%	32%
	30-39	26%	26%
	40-49	22%	21%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	24%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY SOME DO NOT

- Sceptical of authenticity
- Concern of exploitation

I felt it's more of an "abuse attempt" - by that it means they being taken advantage of as a marketable "attraction" - the cultural, historical and lifestyle are taken as a mere saleable tour-trip packages

HIGH YIELD TRAVELLER, SINGAPORE

First of all, I can't imagine what to expect and don't know who's who in Indigenous people . I have never had any engagement with any Indigenous people

HIGH YIELD TRAVELLER, JAPAN

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Indigenous performance e.g. dance, theatre (n=5,177)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

IMMERSIVE

LEARNING

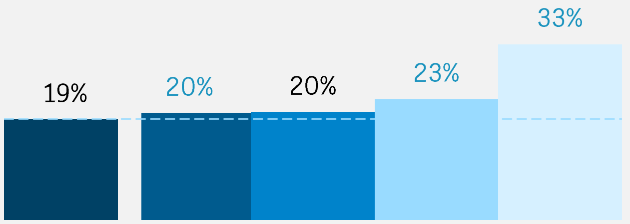
LOCAL COOKING SCHOOLS / CLASSES

IMMERSIVE • LEARNING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost 1 in 5 are interested in local cooking schools or classes, with greater demand from Working Holiday Makers
- India has the greatest interest level with almost half interested, while this experience ranks most highly (48th out of 89) in Canada
- Those interested in this experience tend to be younger, predominantly female, and more likely to seek adventure or passions/hobbies from travel
- The top cross-sell opportunities include other experiential learning options such as artisan food making workshops, Indigenous craft workshops, and short courses

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	16%
	Exploration	17%	18%
	Adventure	14%	16%
	Transformation	13%	14%
	Passion, hobbies	14%	15%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	19%	73	22,508
Canada	24%	48	1,482
UK	22%	52	2,172
USA	23%	53	6,050
Hong Kong	22%	54	275
New Zealand	25%	55	185
Singapore	23%	55	356
Germany	18%	61	1,018
India	28%	62	1,020
France	15%	63	1,145
Philippines	28%	66	790
South Korea	13%	71	1,307
Taiwan	16%	74	442
Italy	13%	76	416
Indonesia	17%	78	231
Vietnam	19%	79	406
Japan	11%	80	832
Thailand	13%	82	280
China	13%	82	3,865
Malaysia	14%	85	235
AUSTRALIANS	26%	48	2,263

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Local cooking schools / classes (n=4,292)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

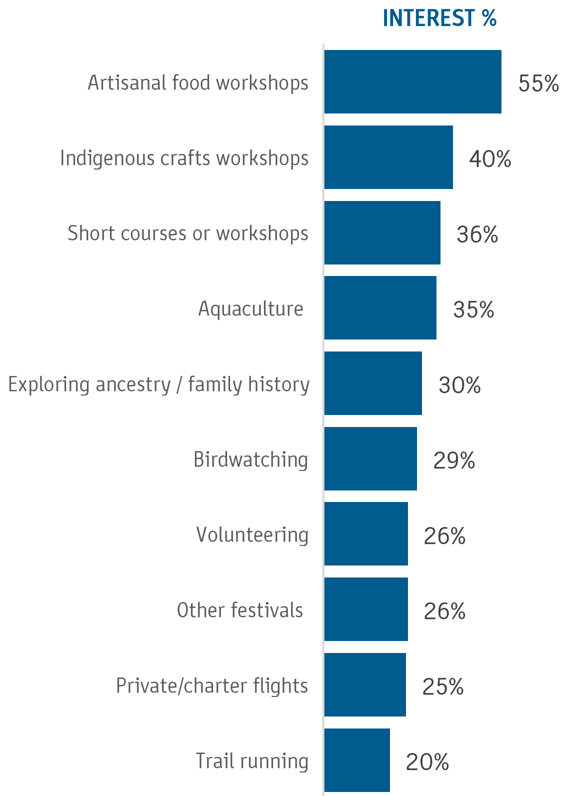
LOCAL COOKING SCHOOLS / CLASSES

IMMERSIVE • LEARNING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	39%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	33%
	Older Families	16%	15%
AGE	18-29	30%	34%
	30-39	26%	26%
	40-49	22%	21%
	50-64	22%	18%
	Average age	38	37
GENDER	Male	50%	42%
	Female	50%	58%
INCOME	Low	25%	25%
	Middle	28%	27%
	High	24%	24%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



> *I am not massively into cooking but I have heard people who have attended a cooking class or school and through learning more skills its bought out their passion for cooking, and I could possibly do with that.*
>
> *HIGH YIELD TRAVELLER, NEW ZEALAND*

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Local cooking schools / classes (n=4,292)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

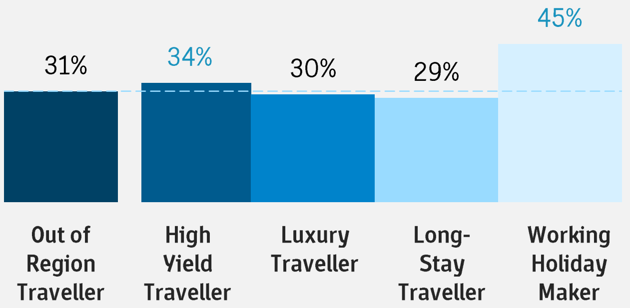
CHEESE/CHOCOLATE ETC. MAKING WORKSHOP WITH AN ARTISAN

IMMERSIVE • LEARNING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall 3 in 10 are interested in cheese, chocolate etc. making artisan workshops, with greatest demand from Working Holiday Makers
- Those interested in this experience tend to be younger and skew heavily female
- Cross-sell opportunities include other immersive learning experiences such as local cooking classses, Indigenous craft workshops and short courses, as well as arts-based experiences (including Indigenous) and winery stays

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	18%
	Into Nature	17%	16%
	Exploration	17%	19%
	Adventure	14%	13%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	31%	30	35,891
Singapore	34%	23	533
Canada	34%	23	2,100
India	36%	25	1,304
USA	33%	25	8,603
Italy	34%	26	1,060
UK	31%	27	2,986
France	27%	27	2,028
New Zealand	35%	27	263
Japan	29%	28	2,276
Indonesia	38%	29	511
Hong Kong	32%	29	397
Malaysia	35%	29	586
Philippines	40%	33	1,106
South Korea	27%	37	2,629
Taiwan	31%	38	837
China	22%	47	6,373
Germany	20%	50	1,143
Vietnam	29%	52	615
Thailand	26%	53	542
AUSTRALIANS	35%	24	3,079

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Cheese/chocolate etc. making workshop with an artisan (n=6,931)

Significantly higher than those not interested

Significantly lower than those not interested

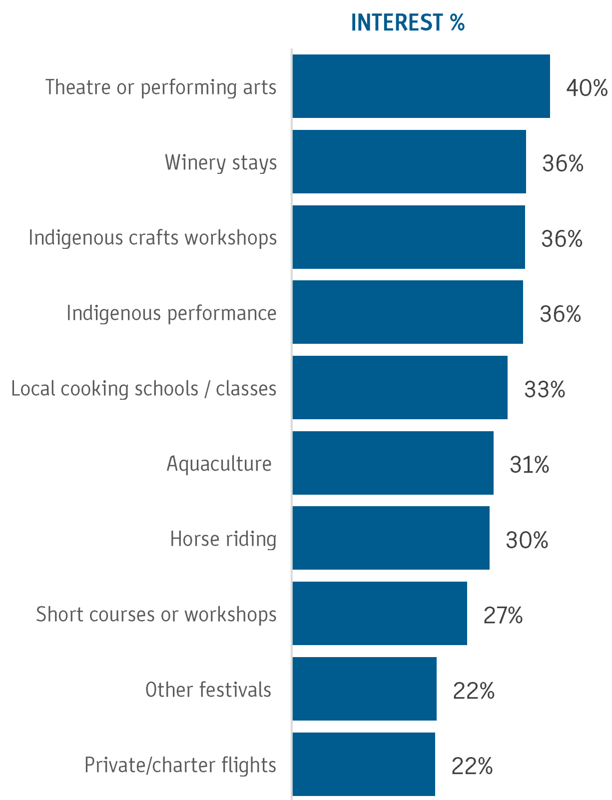
CHEESE/CHOCOLATE ETC. MAKING WORKSHOP WITH AN ARTISAN

IMMERSIVE • LEARNING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	38%
	Older Singles/Couples (45+)	16%	15%
	Young Families	32%	32%
	Older Families	16%	16%
AGE	18-29	30%	33%
	30-39	26%	26%
	40-49	22%	21%
	50-64	22%	20%
	Average age	38	37
GENDER	Male	50%	41%
	Female	50%	59%
INCOME	Low	25%	25%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Chocolate and cheese are foodie drawcards
- Enjoy the hands-on approach and light learning element
- Others find eating what the artisan has prepared more appealing

WHY SOME DO NOT

- Not interested in learning to make chocolate or cheese
- Too much effort

HERO DESTINATIONS

- Destinations known for its chocolate and cheese e.g., Belgium, Switzerland

It sounds an authentic and more cultural experience than normal cooking classes that I can find anywhere these days

HIGH YIELD TRAVELLER, JAPAN

Cheese and chocolate are two of my absolute favourite things!! I have always wanted to make my own chocolate at a factory so this would be amazing. The best thing about it would be the fact you get to have the fun making the item and then you get to keep it and eat it at the end, so you get a great reward after having heaps of fun

HIGH YIELD TRAVELLER, NEW ZEALAND

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fiftyfive5

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Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

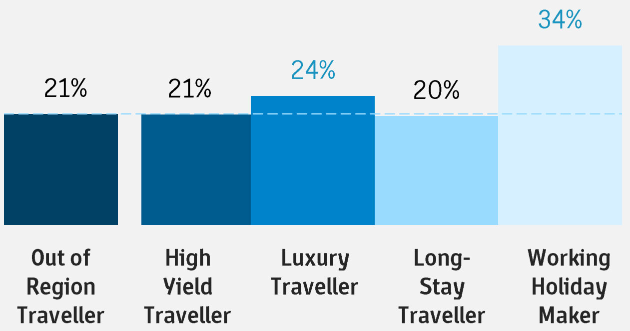
CRAFT WORKSHOPS WITH INDIGENOUS ARTISANS

IMMERSIVE • LEARNING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall around 1 in 5 Out of Region Travellers are interested in craft workshops with Indigenous artisans
- Luxury Travellers and Working Holiday Makers have significantly greater interest in this experience
- Those interested in Indigenous artisan workshops tend to be younger, female, and in family households
- Cross-sell opportunities include other Indigenous experiences across sectors, local cooking schools, and aquaculture

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	18%
	Exploration	17%	19%
	Adventure	14%	15%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	21%	65	23,442
Philippines	37%	38	1,038
France	19%	53	1,384
Indonesia	28%	54	382
Japan	17%	55	1,345
China	19%	57	5,530
Vietnam	28%	59	597
Hong Kong	20%	62	250
Taiwan	22%	62	587
UK	18%	65	1,769
Thailand	22%	66	468
New Zealand	21%	66	155
USA	18%	69	4,717
India	26%	69	944
Malaysia	22%	70	366
Canada	17%	70	1,052
Germany	15%	71	831
Singapore	18%	72	280
Italy	15%	72	479
South Korea	13%	75	1,269
AUSTRALIANS	16%	76	1,423

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Craft workshops with Indigenous artisans (n=4,512)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

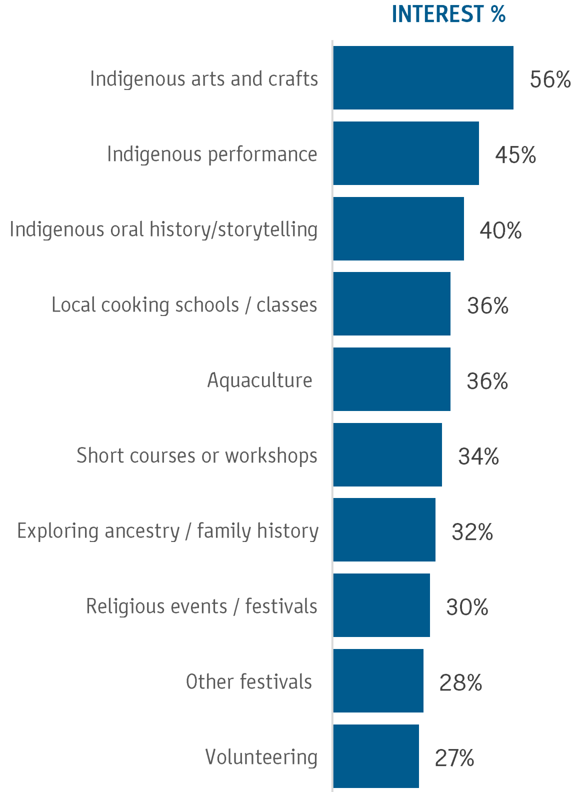
CRAFT WORKSHOPS WITH INDIGENOUS ARTISANS

IMMERSIVE • LEARNING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	35%
	Older Families	16%	16%
AGE	18-29	30%	34%
	30-39	26%	26%
	40-49	22%	21%
	50-64	22%	19%
	Average age	38	37
GENDER	Male	50%	41%
	Female	50%	59%
INCOME	Low	25%	25%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Craft workshops with Indigenous artisans (n=4,512)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

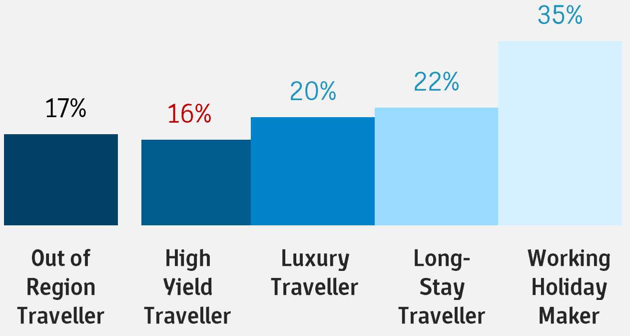
SHORT COURSES OR WORKSHOPS

IMMERSIVE • LEARNING

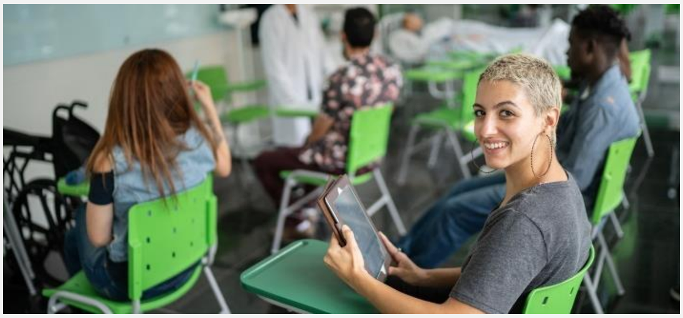
https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 17% of Out of Region Travellers across 19 markets are interested in short courses or workshops
- Stronger interest among Luxury Travellers, Long-Stay Travellers and especially Working Holiday Makers
- Those interested in short courses or workshops skew younger and female, are more likely to seek transformation (as well as adventure and passions or hobbies) from their travels, and have a high consideration and intention for Australia
- Cross-sell opportunities include experiential learning via Indigenous craft workshops or local cooking classes, as well as dual-purpose travel such as workcations, working holidays or volunteering

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	16%
	Exploration	17%	17%
	Adventure	14%	16%
	Transformation	13%	17%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	20%



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	17%	80	19,511
Hong Kong	20%	59	253
UK	18%	67	1,747
Indonesia	22%	67	305
France	13%	69	993
Philippines	27%	70	746
Japan	13%	70	1,025
New Zealand	19%	71	142
Germany	15%	73	824
Canada	16%	74	997
USA	16%	74	4,255
Italy	14%	75	420
India	24%	75	882
Singapore	17%	75	270
South Korea	13%	77	1,245
China	14%	78	4,093
Thailand	17%	79	349
Vietnam	19%	81	401
Taiwan	12%	83	314
Malaysia	15%	84	250
AUSTRALIANS	17%	71	1,510

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Short courses or workshops (n=3,817)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

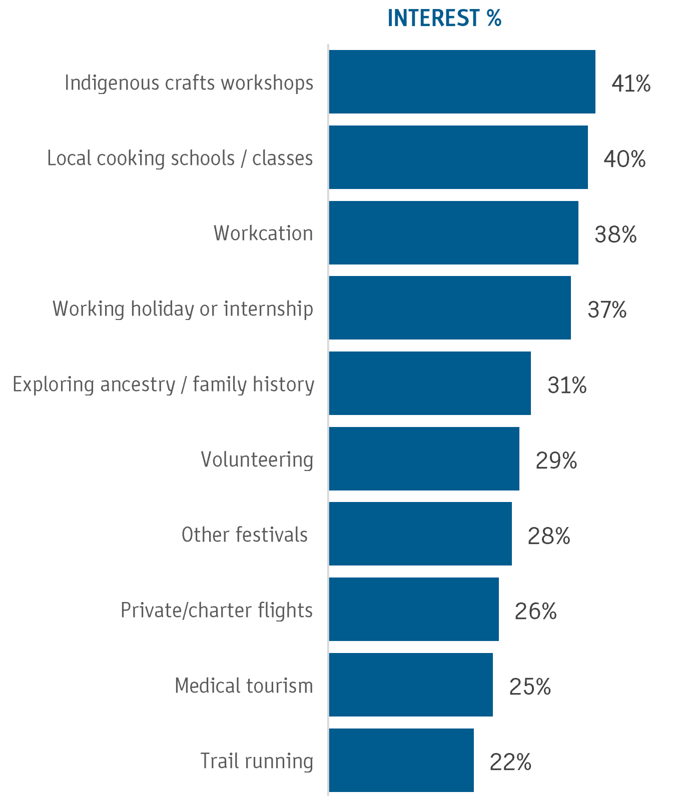
SHORT COURSES OR WORKSHOPS

IMMERSIVE • LEARNING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	40%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	33%
	Older Families	16%	15%
AGE	18-29	30%	35%
	30-39	26%	27%
	40-49	22%	21%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	26%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



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fiftyfive5

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● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

IMMERSIVE

ECO EXPERIENCES

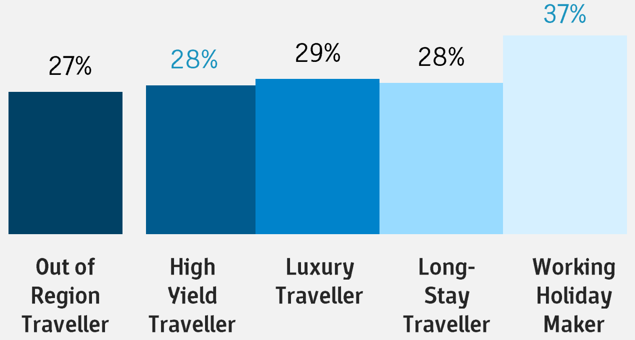
ECO TOURS/ECOTOURISM

IMMERSIVE • ECO EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- More than a quarter of Out of Region travellers are interested in eco tours or ecotourism, stronger among Working Holiday Makers
- China presents a strong opportunity for ecotourism, with above-average interest, a relatively high ranking relative to other experiences, and a large potential market size
- Those interested in ecotourism have higher consideration and intention for Australia as a holiday destination
- Getting into nature and exploration are the primary travel motivations among this audience
- Agritourism, Indigenous experiences and trekking/camping represent strong opportunities for cross-selling or itinerary packaging

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	21%
	Exploration	17%	19%
	Adventure	14%	14%
	Transformation	13%	13%
	Passion, hobbies	14%	13%
	Restoration	7%	5%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	26%	50	28,838
Vietnam	49%	10	1,044
Philippines	48%	16	1,354
China	30%	20	8,665
Taiwan	43%	22	1,168
Malaysia	35%	32	575
Hong Kong	29%	34	364
Thailand	34%	34	712
Indonesia	32%	43	432
Italy	24%	49	745
India	31%	51	1,127
Singapore	23%	56	355
South Korea	20%	57	1,960
Canada	20%	60	1,250
USA	18%	67	4,805
France	14%	67	1,038
Germany	14%	77	777
UK	15%	77	1,480
Japan	11%	79	857
New Zealand	17%	80	130
AUSTRALIANS	17%	74	1,449

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Eco tours/Ecotourism (n=5,675)

Significantly higher than those not interested *Significantly lower than those not interested*

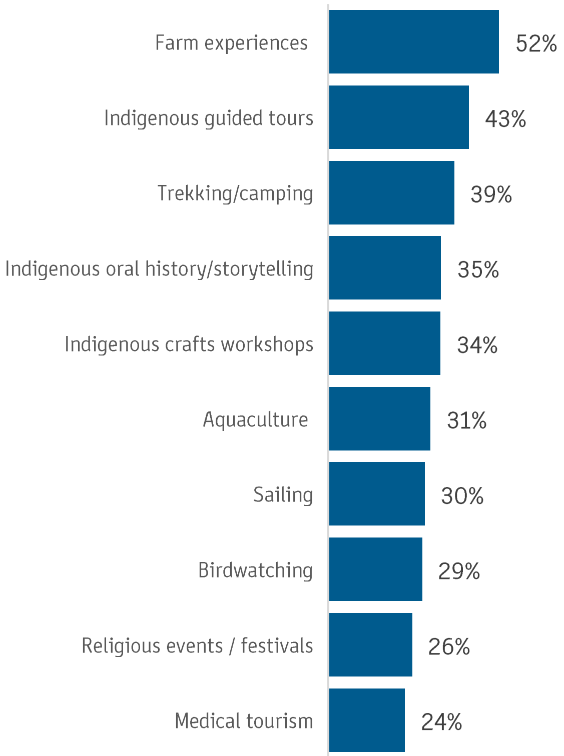
ECO TOURS/ECOTOURISM

IMMERSIVE • ECO EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	36%
	Older Families	16%	17%
AGE	18-29	30%	30%
	30-39	26%	27%
	40-49	22%	23%
	50-64	22%	20%
	Average age	38	38
GENDER	Male	50%	50%
	Female	50%	50%
INCOME	Low	25%	24%
	Middle	28%	26%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Special way to experience unique species and sites specific to a destination
- An experience that one can enjoy while also doing good for the environment
- Connect to nature and learn about protecting the environment and species

HERO DESTINATIONS

- Destinations with distinct climate, ecosystems, and nature experiences e.g., Costa Rica, Australia, Iceland

I put eco tours in here because I think it's unique for many people and would be a unique from the other things that I would tend to do on vacation

HIGH YIELD TRAVELLER, UNITED KINGDOM

Eco tours, eco accommodation and sustainable transportation all these three are unique and important because they are talking about conserving the nature and enjoying the holiday hand in hand.

HIGH YIELD TRAVELLER, INDIA

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Eco tours/Ecotourism (n=5,675)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

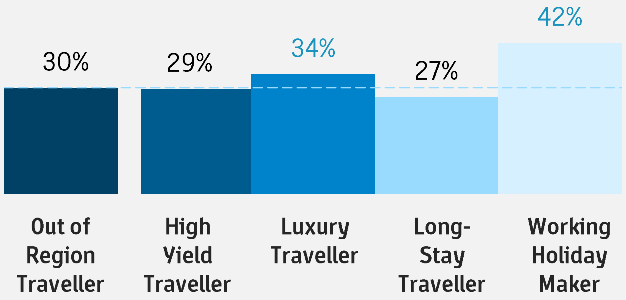
FOREST BATHING

IMMERSIVE • ECO EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 3 in 10 Out of Region Travellers across 19 markets are interested in forest bathing
- Considerable variation in interest for this experience by market – ranging from 18% interest in the US market to 63% of the Indonesian market interested (3rd top experience in this market)
- Those interested in forest bathing are most strongly motivated to get into nature through their travels
- Cross-sell opportunities include ecotourism, trekking/camping, mountain or rock sports, and a range of Indigenous experiences

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	22%
	Exploration	17%	16%
	Adventure	14%	13%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	42%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	29%	39	32,927
Indonesia	63%	3	852
Taiwan	57%	8	1,551
Japan	34%	18	2,709
South Korea	41%	18	3,960
China	27%	25	7,882
Thailand	34%	32	724
India	34%	37	1,264
Malaysia	31%	41	508
France	23%	41	1,736
Hong Kong	26%	43	323
Germany	22%	47	1,231
New Zealand	25%	56	183
Singapore	22%	57	341
Philippines	29%	59	814
Canada	20%	59	1,257
UK	20%	60	1,908
Italy	19%	61	592
USA	18%	70	4,664
Vietnam	20%	78	428
AUSTRALIANS	25%	51	2,156

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Forest bathing (n=6,512)

Significantly higher than those not interested   *Significantly lower than those not interested*

TOURISM AUSTRALIA

FOREST BATHING

IMMERSIVE • ECO EXPERIENCES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	33%
	Older Families	16%	16%
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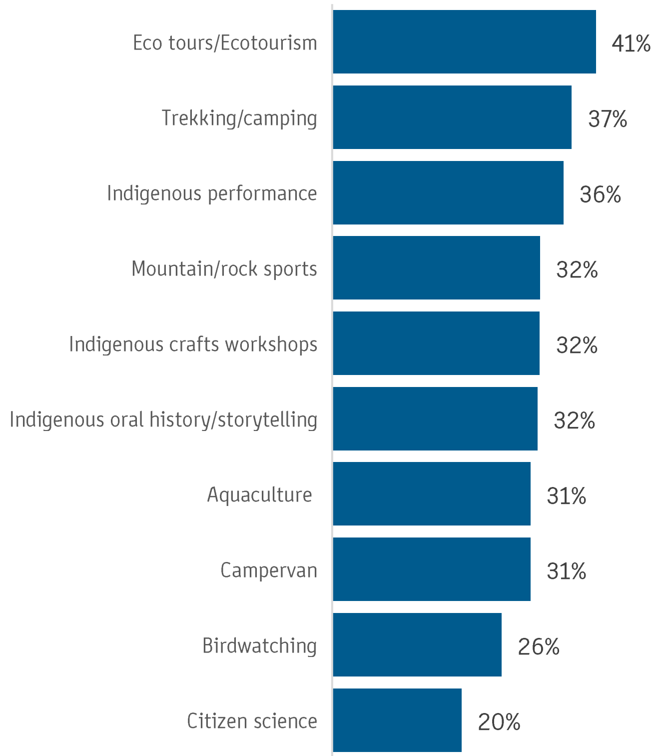
	30-39	26%	28%
	40-49	22%	22%
	50-64	22%	19%
	Average age	38	37
GENDER	Male	50%	50%
	Female	50%	50%
INCOME	Low	25%	26%
	Middle	28%	28%
	High	24%	23%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)

INTEREST %



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Soaking in nature e.g., hot spring
- Peaceful way to experience nature
- Spiritual way to connect with the earth
- Provides health and wellness benefits

WHY SOME DO NOT

- Lack of amenities in the forest is unappealing
- Mosquitoes and other bugs are discomforting
- Prefer a controlled and safe environment e.g., luxury outdoor resort

HERO DESTINATIONS

- Destinations with famous natural landscapes, natural springs and known for bathing e.g., Japan

I go trekking overseas and when I do I like to go forest bathing. After exercising I go to a place like this with negative ions

HIGH YIELD TRAVELLER, JAPAN

The reality is going to disappoint you

HIGH YIELD TRAVELLER, CHINA

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fiftyfive5

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Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

IMMERSIVE

AGRITOURISM

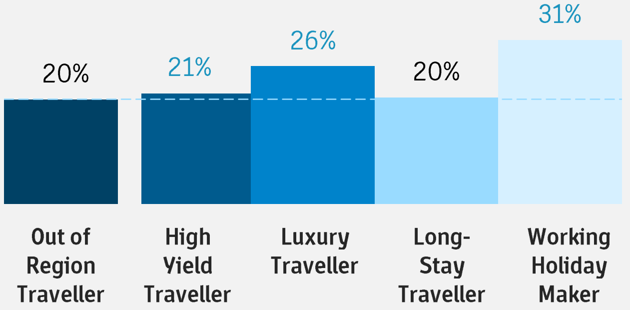
AQUACULTURE

IMMERSIVE • AGRITOURISM

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 1 in 5 are interested in aquaculture experiences such as oysters, pearls and fish farms
- Stronger interest among higher-yielding segments and Working Holiday Makers, as well as several Eastern markets
- Those interested in aquaculture are more likely to be families, with slightly higher incomes
- Cross-sell opportunities include fishing and immersive learning experiences such as Indigenous craft workshops, local cooking schools and short courses or workshops

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	19%
	Exploration	17%	17%
	Adventure	14%	14%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	19%	72	20,835
Hong Kong	26%	40	328
Singapore	25%	43	390
Indonesia	28%	52	388
Vietnam	29%	53	614
Philippines	30%	55	830
China	19%	56	5,552
India	28%	59	1,040
Malaysia	25%	63	408
Germany	16%	64	924
Taiwan	19%	67	520
Thailand	22%	70	457
USA	16%	75	4,225
New Zealand	18%	76	134
Italy	13%	78	405
Japan	11%	78	885
France	11%	78	811
UK	15%	80	1,421
Canada	14%	84	835
South Korea	7%	86	667
AUSTRALIANS	18%	68	1,562

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Aquaculture e.g. pearls, oysters, fish farms (n=4,244)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

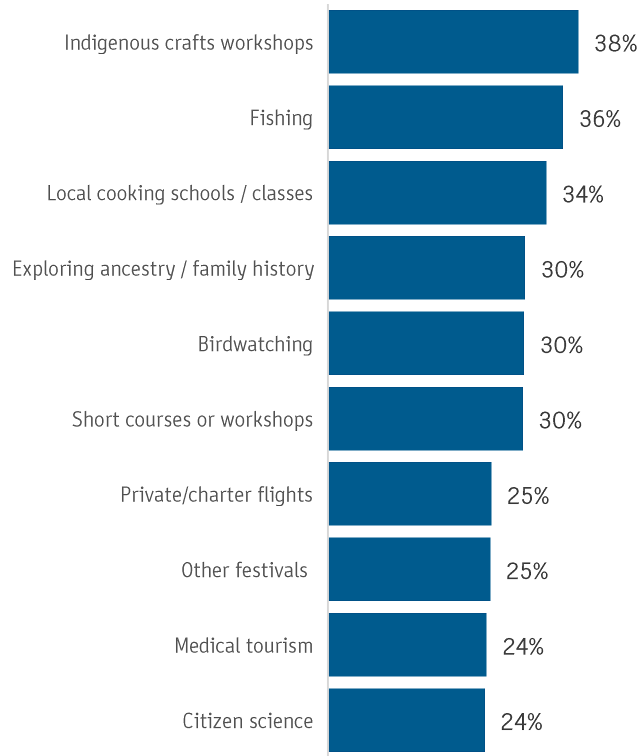
AQUACULTURE

IMMERSIVE • AGRITOURISM

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	32%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	37%
	Older Families	16%	18%
AGE	18-29	30%	31%
	30-39	26%	26%
	40-49	22%	23%
	50-64	22%	20%
	Average age	38	38
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	24%
	Middle	28%	26%
	High	24%	27%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY SOME DO NOT

- Labour intensive
- Not interested in aquaculture or learning about it during shorter holidays

Sounds like it might be a bit cold and wet in a fish farm - get enough of that in England!
HIGH YIELD TRAVELLER, UNITED KINGDOM

A fishing charter where you get to eat what you catch (the fish being cooked and prepared by the charter).

HIGH YIELD TRAVELLER, NEW ZEALAND

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fiftyfive5

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● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

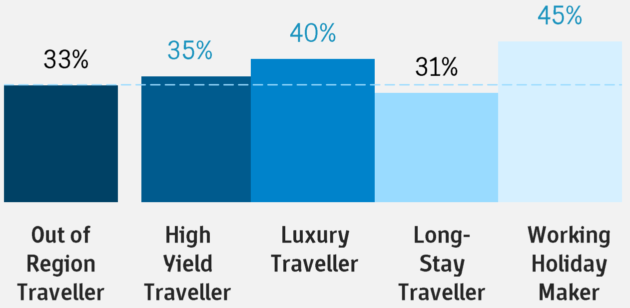
FARM EXPERIENCES

IMMERSIVE • AGRITOURISM

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall a third of Out of Region travellers are interested in fam experiences such as farm gate tours, farm stays and pick-your-own
- Demand for farm experiences is stronger among higher-yielding audiences and Working Holiday Makers, and most Eastern markets
- Considerable variation by market, ranking 7th most popular experience in Singapore with almost half interested, down to 66th in Canada and just 19% interested
- Cross-sell opportunities include Indigenous craft-based experiences, ecotourism, homestays with locals or staying in an agricultural region, and aquaculture

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	20%
	Exploration	17%	18%
	Adventure	14%	11%
	Transformation	13%	14%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	33%	27	35,264
Singapore	48%	7	739
Vietnam	49%	9	1,055
China	38%	9	10,839
Hong Kong	44%	9	545
Taiwan	47%	14	1,281
Malaysia	41%	15	689
Indonesia	45%	15	606
Thailand	44%	18	924
Philippines	43%	27	1,199
India	35%	34	1,274
Italy	28%	39	878
South Korea	25%	43	2,432
France	20%	49	1,475
Germany	20%	53	1,121
UK	22%	54	2,144
USA	21%	60	5,503
New Zealand	22%	62	163
Japan	16%	63	1,239
Canada	19%	66	1,160
AUSTRALIANS	26%	47	2,297

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Farm experiences e.g. farm gate tour, farm stay, pick your own (n=7,026)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

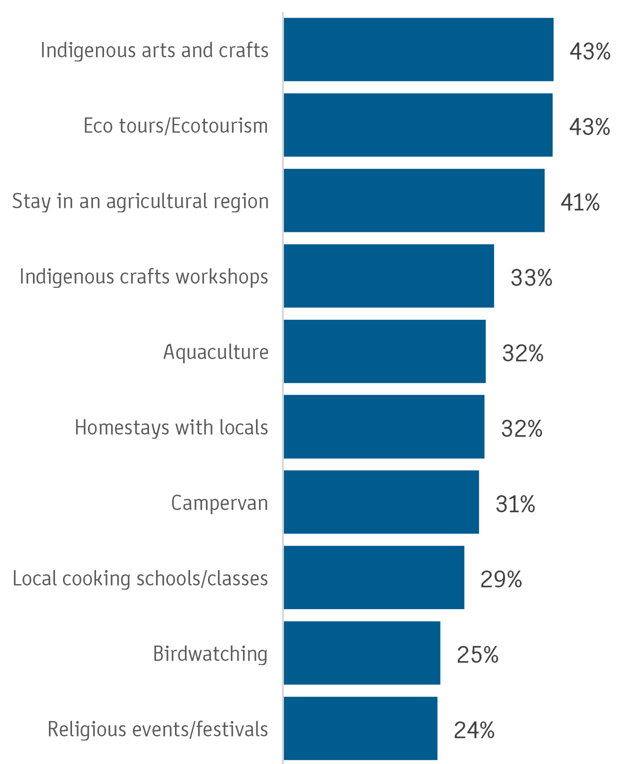
FARM EXPERIENCES

IMMERSIVE • AGRITOURISM

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	33%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	35%
	Older Families	16%	18%
AGE	18-29	30%	29%
	30-39	26%	27%
	40-49	22%	23%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	24%
	Middle	28%	27%
	High	24%	27%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Niche and sensorial way to experience animals and food
- Interested in farming practices
- Fun activity for children

WHY SOME DO NOT

- Do not enjoy learning about food systems, farm practices etc. on holiday
- Not a priority experience

“

I would love to be on a farm working and learning how food/drink is grown and harvested

HIGH YIELD TRAVELLER, UNITED KINGDOM

I'm a nightlife person, so this is interesting to me. Have a pass like bar crawl or something

HIGH YIELD TRAVELLER, SINGAPORE

”

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fiftyfive5

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● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

IMMERSIVE

PERSONAL JOURNEY

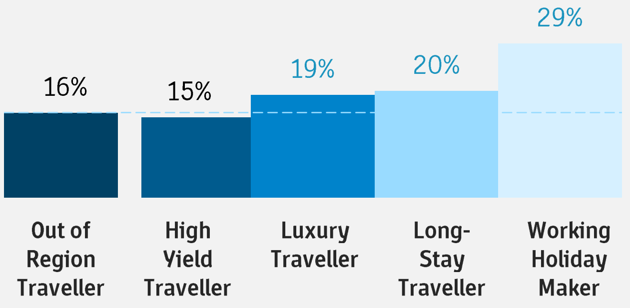
RELIGIOUS EVENTS / FESTIVALS

IMMERSIVE • PERSONAL JOURNEY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 16% are interested in religious events or festivals, with greater demand from Luxury Travellers, Long-Stay Travellers and Working Holiday Makers
- Several South/South East Asian markets have greater demand for this experience, while Western markets are less interested
- Those interested in religious events or festivals tend to be younger, family lifestages with young children, and more motivated to travel to seek adventure or transformation
- Cross-sell opportunities include religious heritage or pilgrimages, Indigenous craft workshops and Indigenous storytelling

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	18%
	Exploration	17%	16%
	Adventure	14%	17%
	Transformation	13%	15%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	16%	82	16,499
India	34%	39	1,251
Taiwan	22%	61	601
Indonesia	22%	68	300
Vietnam	24%	70	509
Philippines	27%	71	746
Thailand	20%	73	425
Singapore	16%	78	255
Hong Kong	14%	79	179
Malaysia	17%	80	279
China	13%	81	3,873
France	9%	83	673
South Korea	8%	83	767
Japan	9%	83	711
Germany	8%	85	468
New Zealand	13%	85	94
Italy	10%	86	314
USA	12%	86	3,198
UK	11%	87	1,088
Canada	12%	87	768
AUSTRALIANS	12%	86	1,025

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Religious events / festivals (n=3,496)

Significantly higher than those not interested

Significantly lower than those not interested

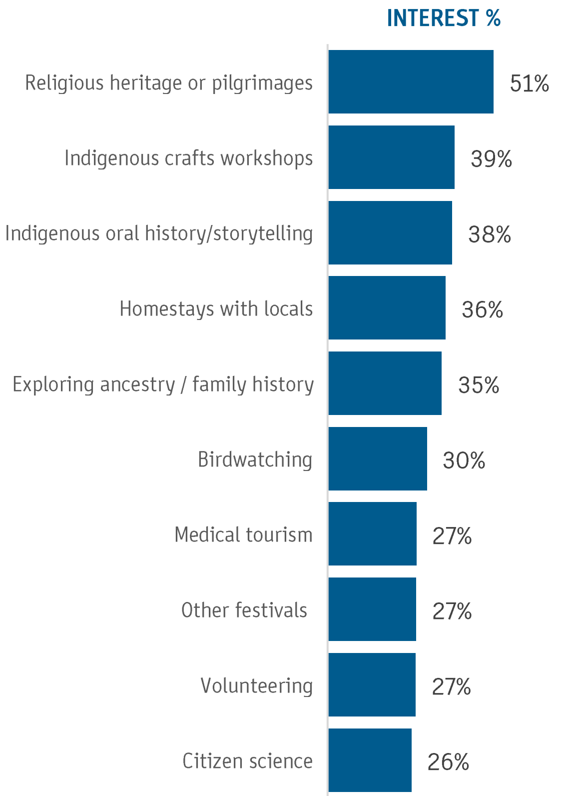
RELIGIOUS EVENTS / FESTIVALS

IMMERSIVE • PERSONAL JOURNEY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	37%
	Older Families	16%	17%
AGE	18-29	30%	33%
	30-39	26%	28%
	40-49	22%	20%
	50-64	22%	19%
	Average age	38	37
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	26%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	21%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

Unanimously unappealing across markets

WHY SOME DO NOT

• Lack of connection to religion
• Prefer to observe from afar, not participate
• Consider religion to be private and personal and not appropriate to participate, especially if one is not apart of the religion

HERO DESTINATIONS

• Festivals like Day of the Dead • Dependent on personal religion/ religion of interest

I don't think I need a change of country to do this, and generally I'm not very religious
HIGH YIELD TRAVELLER, SINGAPORE

I think religious and writing festivals just sound a bit niche and dull for me. I want to have fun and be excited by things. These are very specific to certain peoples interests/hobbies
HIGH YIELD TRAVELLER, UNITED KINGDOM

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fiftyfive5

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● *Significantly higher than those not interested*   ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

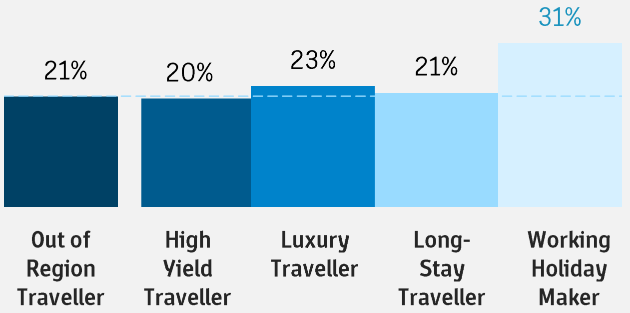
RELIGIOUS HERITAGE OR PILGRIMAGES

IMMERSIVE • PERSONAL JOURNEY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall 1 in 5 are interested in exploring religious heritage or pilgrimages when they travel, with greatest interest among the Indian and Indonesian markets
- Those interested in religious heritage or pilgrimages are more likely to be young families
- Cross-sell opportunities include war history, religious festivals and events, and Indigenous storytelling or craft workshops

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	18%
	Exploration	17%	18%
	Adventure	14%	15%
	Transformation	13%	15%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	21%	66	22,060
India	35%	28	1,299
Indonesia	36%	36	484
Japan	22%	40	1,705
Malaysia	28%	49	467
Taiwan	23%	59	613
Singapore	22%	61	333
China	18%	62	5,051
Vietnam	27%	63	586
France	14%	64	1,059
Philippines	28%	65	792
Italy	16%	68	500
South Korea	14%	69	1,324
Hong Kong	18%	70	226
Thailand	21%	72	442
UK	16%	76	1,520
USA	15%	79	4,057
Germany	11%	82	621
New Zealand	16%	82	122
Canada	14%	83	859
AUSTRALIANS	17%	72	1,483

RELIGIOUS HERITAGE OR PILGRIMAGES

IMMERSIVE • PERSONAL JOURNEY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
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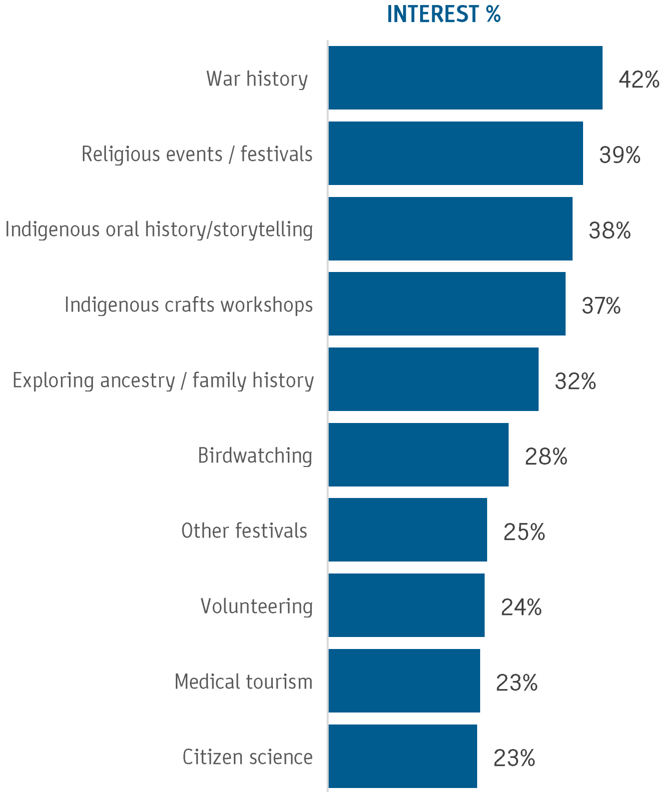
	Older Families	16%	17%
AGE	18-29	30%	30%
	30-39	26%	28%
	40-49	22%	21%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	25%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



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fiftyfive5

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● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

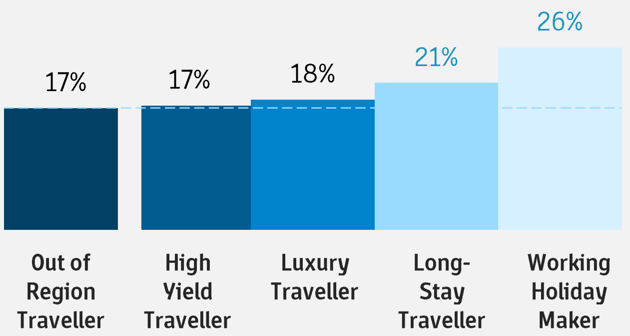
EXPLORING ANCESTRY / FAMILY HISTORY

IMMERSIVE • PERSONAL JOURNEY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 17% of Out of Region Travellers are interested in exploring ancestry or family history
- This experience ranks highest in appeal in English-speaking Western markets
- Those interested in ancestry are more likely to be young families and tend to earn higher incomes
- Cross-sell opportunities include war history, Indigenous experiences, and religious events or festivals

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	17%
	Exploration	17%	18%
	Adventure	14%	16%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	22%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	17%	79	20,452
USA	25%	42	6,711
Canada	26%	44	1,592
New Zealand	27%	51	199
UK	19%	62	1,838
India	26%	66	959
Indonesia	23%	66	310
Germany	16%	67	897
Singapore	19%	70	298
Malaysia	20%	73	338
Philippines	26%	74	722
Taiwan	13%	78	353
Italy	12%	80	387
France	9%	82	682
Vietnam	19%	82	397
Hong Kong	10%	86	128
Thailand	11%	87	240
China	12%	87	3,538
Japan	7%	87	530
South Korea	3%	89	334
AUSTRALIANS	24%	53	2,101

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Exploring ancestry / family history (n=3,885)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

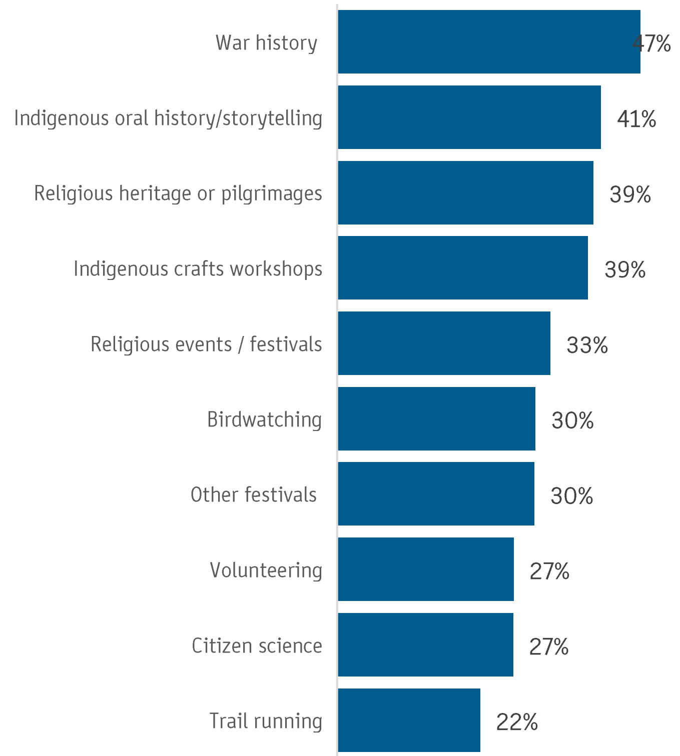
EXPLORING ANCESTRY / FAMILY HISTORY

IMMERSIVE • PERSONAL JOURNEY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	33%
	Older Singles/Couples (45+)	16%	14%
	Young Families	32%	37%
	Older Families	16%	16%
AGE	18-29	30%	32%
	30-39	26%	27%
	40-49	22%	21%
	50-64	22%	20%
	Average age	38	37
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	24%
	Middle	28%	26%
	High	24%	25%
	Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Exploring ancestry / family history (n=3,885)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

INTERESTS

HOBBIES

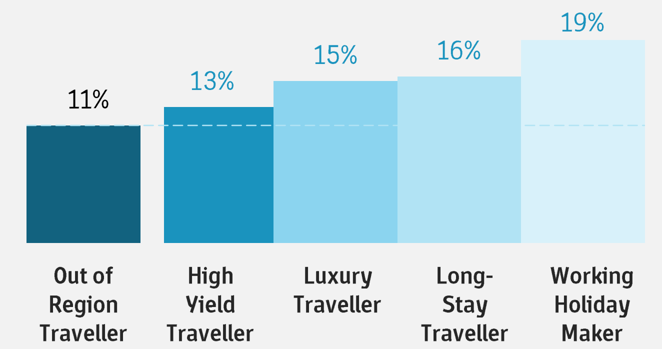
GOLF

INTERESTS • HOBBIES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- At a global level, golf attracts the most niche interest level of the 89 experiences tested, with 11% interested and ranking 89th
- Stronger interest across all key segments (especially Working Holiday Makers) and in larger markets including the US, China and South Korea
- Those interested in golf skew heavily male, with strong consideration and intention to holiday in Australia
- This audience is more likely to seek adventure, transformation and passions or hobbies as travel motivations
- Strong cross-sell opportunities include attending sports events, active hobbies like horse riding and fishing, and surfing and sailing

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	16%
	Exploration	17%	13%
	Adventure	14%	18%
	Transformation	13%	17%
	Passion, hobbies	14%	17%
	Restoration	7%	5%
Consideration of Australia		37%	48%
Actively planning to visit Australia		15%	23%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	11%	89	15,796
South Korea	14%	68	1,345
Japan	12%	74	951
USA	15%	77	4,090
China	14%	79	4,044
Canada	15%	79	910
UK	12%	85	1,148
Taiwan	8%	86	229
New Zealand	12%	86	90
Germany	8%	86	437
Vietnam	15%	87	326
India	15%	87	553
France	6%	88	480
Hong Kong	10%	88	125
Thailand	9%	88	199
Philippines	11%	89	303
Italy	6%	89	172
Indonesia	8%	89	107
Malaysia	8%	89	138
Singapore	10%	89	149
AUSTRALIANS	12%	85	1,040

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Golf (n=2,569)

Significantly higher than those not interested

Significantly lower than those not interested

fiftyfive5

TOURISM AUSTRALIA

GOLF

INTERESTS • HOBBIES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	34%
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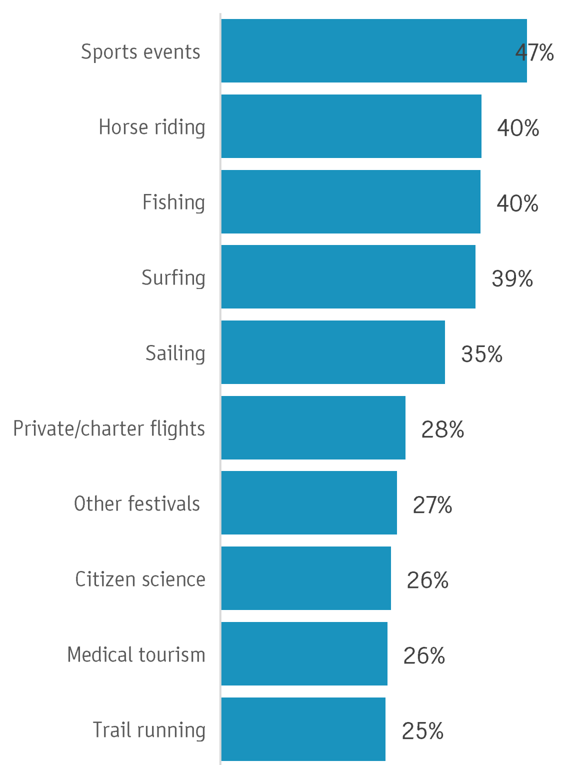
	Young Families	32%	40%
	Older Families	16%	16%
AGE	18-29	30%	35%
	30-39	26%	28%
	40-49	22%	20%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	60%
	Female	50%	40%
INCOME	Low	25%	19%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	28%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Passionate about golf at home
- Activity that gets you outside
- Easily can be a group activity and is social

WHY SOME DO NOT

- Do not enjoy golf or do not know how to play
- Cost conscious e.g., gear

I do also enjoy my golf and really would like to spend a week or so playing in Spain or Portugal, I understand the courses are amazing

HIGH YIELD TRAVELLER, UNITED KINGDOM

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Golf (n=2,569)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

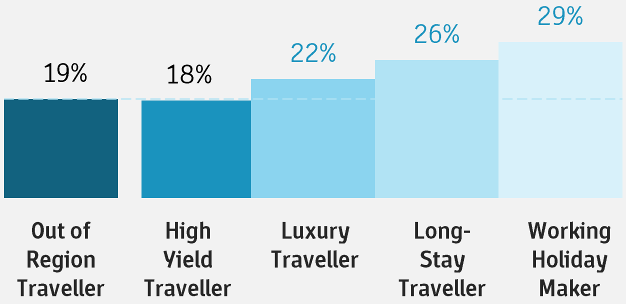
FISHING

INTERESTS • HOBBIES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, around 1 in 5 are interested in fishing when they travel, with greater interest from Luxury and Long-Stay Travellers and Working Holiday Makers
- The USA is the largest volume opportunity, with above-average interest and an estimated 6.2m travellers per year interested in fishing
- Those interested in fishing are most strongly motivated to get into nature or seek adventure through their travels, and skew heavily male, younger and family lifestages
- Key cross-sell opportunities include aquaculture, horse riding, surfing, sailing and bird watching

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	19%
	Exploration	17%	15%
	Adventure	14%	17%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	19%	76	21,726
Vietnam	32%	42	695
USA	24%	52	6,262
India	29%	56	1,062
New Zealand	22%	61	166
Thailand	23%	63	495
Indonesia	24%	63	331
Canada	18%	68	1,139
Japan	14%	68	1,080
France	13%	73	961
Hong Kong	16%	73	205
China	15%	74	4,278
Malaysia	18%	76	307
Singapore	17%	77	255
South Korea	12%	78	1,196
Philippines	25%	78	693
Taiwan	13%	79	341
Italy	12%	83	370
Germany	11%	83	602
UK	13%	83	1,290
AUSTRALIANS	19%	63	1,700

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Fishing (n=4,083)

Significantly higher than those not interested *Significantly lower than those not interested*

TOURISM AUSTRALIA

FISHING

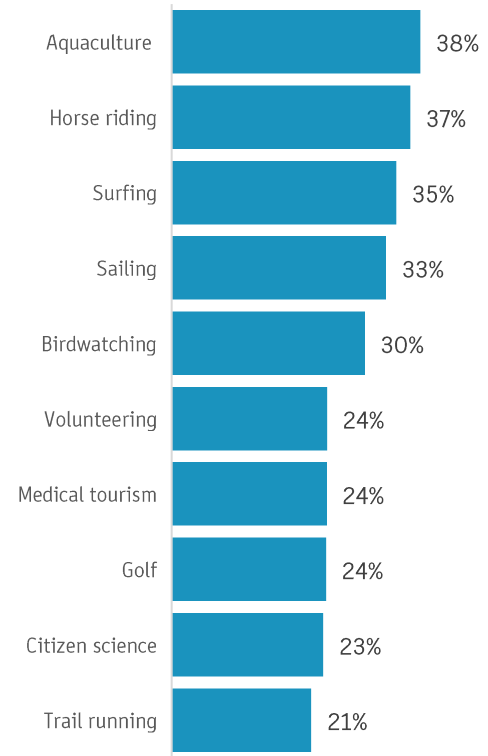
INTERESTS • HOBBIES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	33%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	38%
	Older Families	16%	17%
AGE	18-29	30%	35%
	30-39	26%	26%
	40-49	22%	21%
	50-64	22%	18%
	Average age	38	37
GENDER	Male	50%	60%
	Female	50%	40%
INCOME	Low	25%	26%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	21%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)

INTEREST %



I'm a sucker for fishing so if it relates to that I'm interested.

HIGH YIELD TRAVELLER, NEW ZEALAND

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

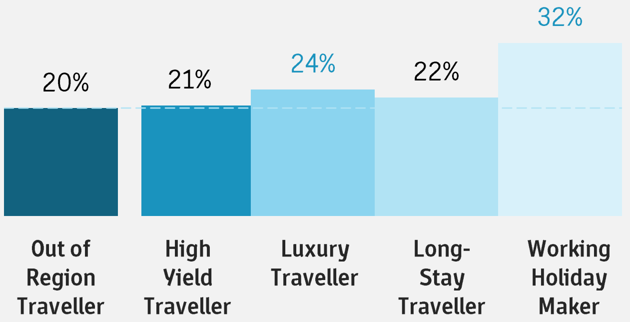
HORSE RIDING

INTERESTS • HOBBIES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall 1 in 5 are interested in horse riding, with greater interest among Luxury Travellers and Working Holiday Makers
- This experience ranks in the top 50 in the Indian and US markets, while Italy has the lowest interest
- Those interested in horse riding skew younger (18-29), female and below-average incomes
- Cross-sell opportunities include adventure/extreme sports, surfing, sailing, aquaculture, fishing and 4WD/off-roading

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	17%
	Exploration	17%	17%
	Adventure	14%	16%
	Transformation	13%	13%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	20%	68	25,056
India	32%	44	1,192
USA	25%	46	6,539
Vietnam	29%	51	620
China	21%	52	5,912
Canada	22%	53	1,364
Malaysia	26%	56	433
Taiwan	23%	57	621
Singapore	22%	60	334
Japan	14%	65	1,137
New Zealand	21%	65	157
Germany	16%	66	908
France	14%	66	1,042
Philippines	27%	67	764
Hong Kong	19%	68	233
UK	18%	68	1,731
Indonesia	20%	72	268
South Korea	13%	76	1,251
Thailand	12%	85	257
Italy	10%	87	295
AUSTRALIANS	18%	66	1,614

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Horse riding (n=4,548)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

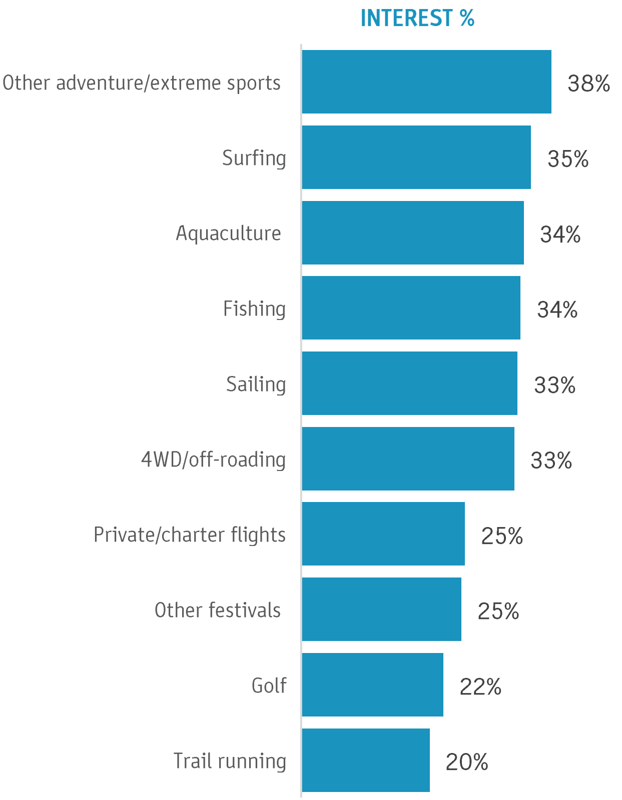
HORSE RIDING

INTERESTS • HOBBIES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	38%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	35%
	Older Families	16%	15%
AGE	18-29	30%	38%
	30-39	26%	26%
	40-49	22%	20%
	50-64	22%	16%
	Average age	38	36
GENDER	Male	50%	43%
	Female	50%	57%
INCOME	Low	25%	27%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	21%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Enjoy horseback riding
- Good way to explore certain destinations

WHY SOME DO NOT

- Do not how to horse ride
- Safety concerns

Nature adventure would be something I'd be interested in doing but would depend on the specific activity - I wouldn't enjoy something like fishing but would be more keen on maybe horse riding or cycling in nature.

HIGH YIELD TRAVELLER, UNITED KINGDOM

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Horse riding (n=4,548)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

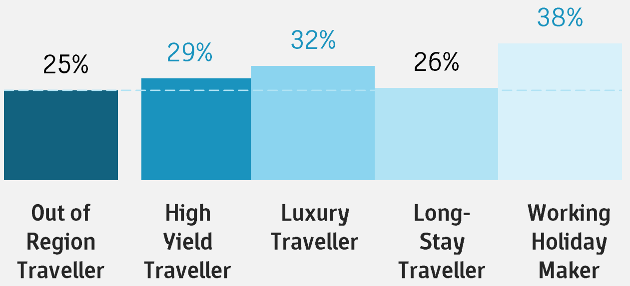
SPORTS EVENTS

INTERESTS • HOBBIES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, a quarter of Out of Region Travellers are interested in attending sports events when they travel, with greater interest among higher-yielding segments and Working Holiday Makers
- Sports events rank most highly in the Chinese market, coming in 30th of 89 experiences, with an estimated 7.4m travellers p.a. interested
- Those interested in sports events skew male, younger, with higher incomes and strong interest in Australia
- Key cross-sell opportunities include active pursuits (water sports, adventure/extreme sports, 4WD, sailing), as well as war history and nightlife

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	15%
	Exploration	17%	17%
	Adventure	14%	14%
	Transformation	13%	14%
	Passion, hobbies	14%	16%
	Restoration	7%	6%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	25%	52	31,352
China	26%	30	7,440
South Korea	27%	38	2,612
Japan	22%	38	1,767
UK	27%	39	2,597
Indonesia	34%	41	464
Canada	26%	43	1,615
USA	25%	44	6,554
Italy	26%	45	799
France	21%	46	1,550
New Zealand	28%	47	207
Germany	22%	48	1,230
Philippines	33%	48	935
Hong Kong	23%	51	286
Malaysia	25%	62	410
India	28%	63	1,017
Vietnam	27%	64	585
Thailand	23%	64	491
Singapore	20%	68	304
Taiwan	18%	72	489
AUSTRALIANS	28%	43	2,426

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Sports events e.g. Olympics, World Cup, Formula 1, Champions League (n=5,655)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

SPORTS EVENTS

INTERESTS • HOBBIES

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

DEMOGRAPHIC PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
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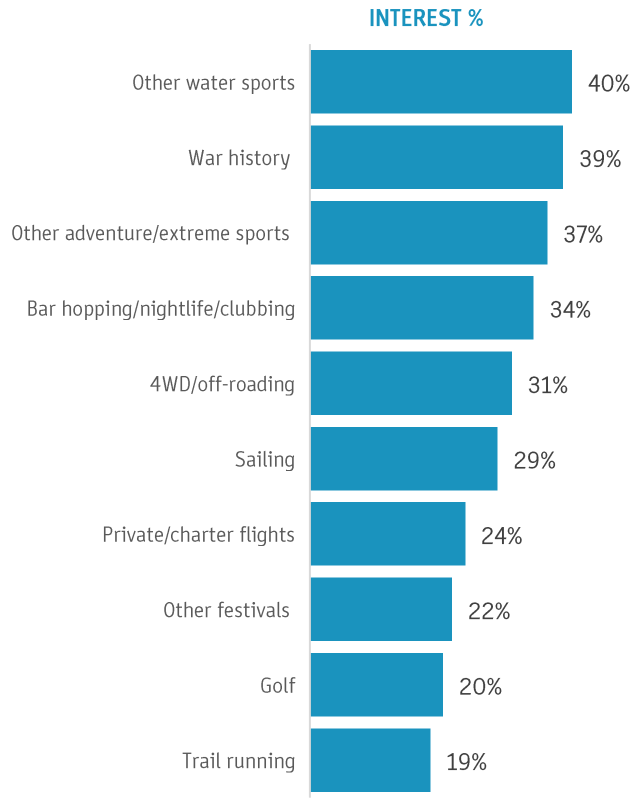
	Young Families	32%	36%
	Older Families	16%	16%
AGE	18-29	30%	34%
	30-39	26%	28%
	40-49	22%	21%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	60%
	Female	50%	40%
INCOME	Low	25%	21%
	Middle	28%	27%
	High	24%	26%
	Very high	22%	26%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Those passionate about sports are driven to seek out as a travel experience. • Opportunity to be part of once-in-a-lifetime events

WHY SOME DO NOT

• For more niche sport events, appealing to a few travellers with special interest

HERO DESTINATIONS

• Specific to sport e.g. American football

I don't have much interest in sport and would not spend vacation time at a sporting event!
HIGH YIELD TRAVELLER, UNITED KINGDOM

I'm a big sports fan so I would use the opportunity over there to watch my favourite football teams live in their amazing stadium. It would be something I touched in earlier and that would be to travel to destinations where I can watch my favourite sports team live!

HIGH YIELD TRAVELLER, INDIA

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Sports events e.g. Olympics, World Cup, Formula 1, Champions League (n=5,655)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

INTERESTS

PHOTOGRAPHY

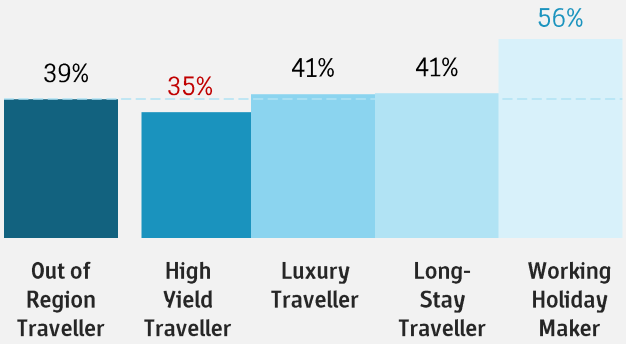
PHOTOGRAPHY

INTERESTS • PHOTOGRAPHY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost 2 in 5 Out of Region travellers are interested in engaging in photography when they travel, with higher interest among the Working Holiday Maker segment and several South/South East Asian markets
- Those interested in photography tend to be younger, with slightly lower incomes
- Cross-sell and itinerary packaging opportunities include night sky photography, a range of festivals, Indigenous craft-based experiences, trekking/camping and birdwatching

INTEREST IN THE EXPERIENCE BY SEGMENT



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TRAVEL MOTIVATIONS	Reconnection	17%	16%
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	Transformation	13%	14%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	43%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	39%	17	43,548
Thailand	64%	1	1,350
India	59%	2	2,167
Philippines	63%	5	1,772
South Korea	56%	6	5,517
Indonesia	52%	9	704
Malaysia	45%	12	740
Japan	39%	14	3,059
Germany	33%	23	1,886
China	29%	24	8,300
Italy	35%	25	1,083
USA	30%	28	8,009
France	26%	30	1,961
Vietnam	36%	30	772
Singapore	28%	33	436
Hong Kong	31%	33	386
UK	27%	35	2,625
Canada	28%	37	1,721
Taiwan	31%	37	846
New Zealand	29%	42	213
AUSTRALIANS	29%	40	2,508

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Photography (n=8,468)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

PHOTOGRAPHY

INTERESTS • PHOTOGRAPHY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
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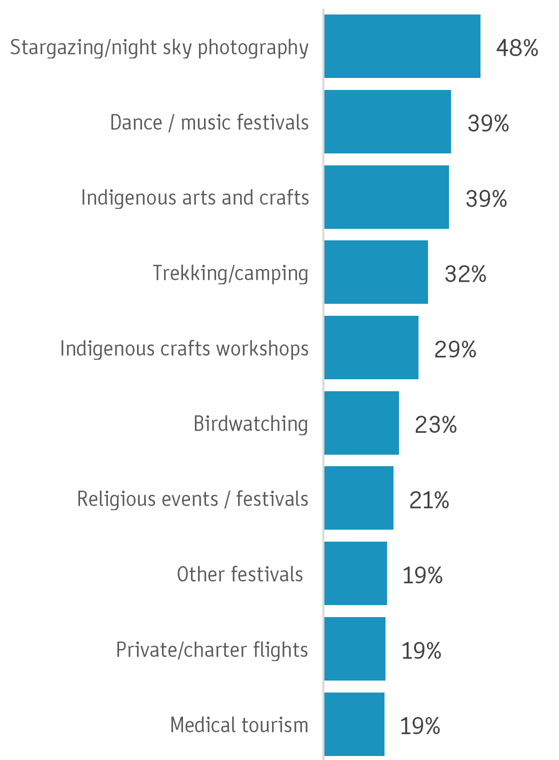
	Older Families	16%	16%
AGE	18-29	30%	36%
	30-39	26%	27%
	40-49	22%	20%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	26%
	Middle	28%	28%
	High	24%	23%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Aligns with personal passion/ hobby.• Ability to capture beautiful/ unique scenery and/or special memories.

WHY SOME DO NOT

• Does not align with personal interest or hobby

HERO DESTINATIONS

• Northern lights

I also enjoy photography whilst travelling and try to indulge in that as much as I can when I'm away. It compliments our style of travel very well though as when we hike it's usually in places with beautiful scenery and landscapes, and if we take our GoPro as well that usually encourages us to be more adventurous in our choice of activities.

HIGH YIELD TRAVELLER, UNITED KINGDOM

I am photographer and I really want to capture beautiful places. Traveling makes you a story teller. I love to tell stories through my photographs

HIGH YIELD TRAVELLER, INDIA

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5 *Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Photography (n=8,468)*

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

TOURISM AUSTRALIA

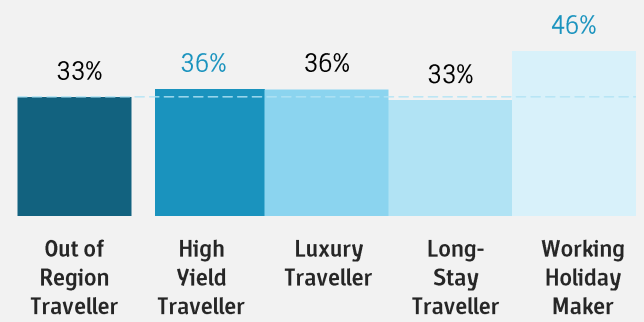
STARGAZING/NIGHT SKY PHOTOGRAPHY

INTERESTS • PHOTOGRAPHY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- A third of Out of Region Travellers are interested in stargazing or night sky photography, with significantly greater interest among High-Yield Travellers and Working Holiday Makers
- South Korea has the strongest interest, with more than half of the market interested and this experience ranked within their top 10
- Those interested in stargazing/night sky photography tend to be younger, without children, and skew female
- Cross-sell opportunities include aurora exploration, theatre or performing arts, and camping and comfort camping experiences

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	17%
	Into Nature	17%	19%
	Exploration	17%	18%
	Adventure	14%	12%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	33%	25	39,086
South Korea	52%	9	5,065
Japan	37%	15	2,919
Hong Kong	36%	23	450
China	29%	23	8,349
Malaysia	37%	24	621
Taiwan	41%	25	1,115
New Zealand	36%	26	266
Thailand	38%	26	796
Singapore	32%	27	498
Indonesia	38%	28	512
Philippines	42%	30	1,163
UK	29%	33	2,787
Vietnam	35%	34	748
Germany	26%	37	1,452
USA	28%	39	7,308
France	23%	43	1,671
Canada	25%	45	1,557
Italy	25%	47	779
India	28%	60	1,031
AUSTRALIANS	29%	38	2,577

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Stargazing/night sky photography (n=7,294)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

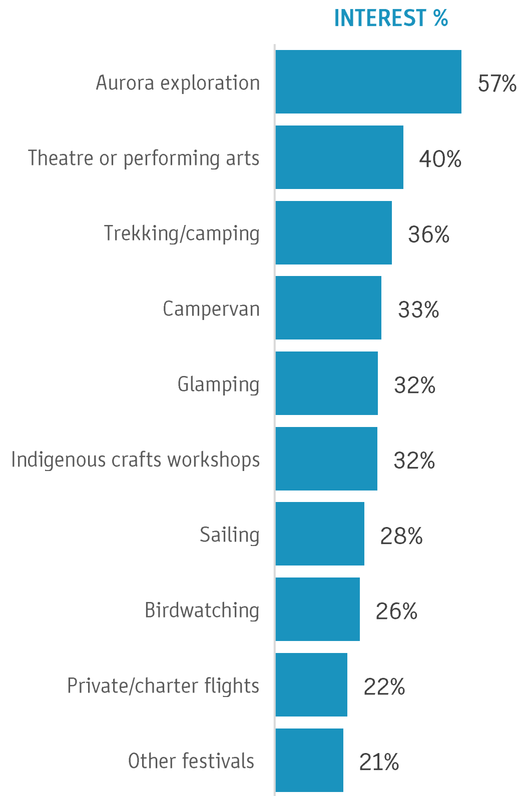
STARGAZING/NIGHT SKY PHOTOGRAPHY

INTERESTS • PHOTOGRAPHY

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

DEMOGRAPHIC PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	42%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	31%
	Older Families	16%	14%
AGE	18-29	30%	36%
	30-39	26%	27%
	40-49	22%	20%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	43%
	Female	50%	57%
INCOME	Low	25%	25%
	Middle	28%	28%
	High	24%	25%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Immerse in nature / outdoors
- Peaceful and relaxing
- Passionate about astronomy and/or photography

WHY SOME DO NOT

- Something that can be experienced at home
- Too zen and not exciting enough as an activity alone

HERO DESTINATIONS

- Remote destinations far from city lights
- Destinations with vast landscape and nature e.g., Northern Canada

I think it depends on exactly what it would be if I'd be interested in doing it. I'm not a big contemplator so sitting still at night in the dark would just make me fall asleep

HIGH YIELD TRAVELLER, UNITED STATES

I remember a time where I could see the stars well. I lay down and looked at the stars together with my children. I really liked that feeling.

HIGH YIELD TRAVELLER, SOUTH KOREA

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Stargazing/night sky photography (n=7,294)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

EXTENDED

TRAVEL+

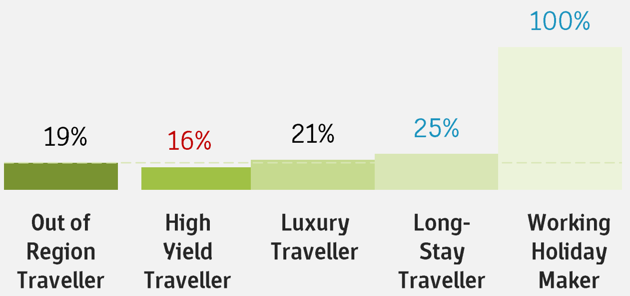
WORKING HOLIDAY OR INTERNSHIP

EXTENDED • TRAVEL +

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, around 1 in 5 Out of Region Travellers are interested in taking a working holiday or internship abroad
- Greater appeal among Long-Stay Travellers and South/South East Asian markets
- Those interested in working holidays skew much younger (although a sizable proportion interested are older than the age limit for a working holiday visa), with lower incomes, and tend to seek adventure, transformation and pursuit of hobbies and passions
- Cross-sell opportunities include workcations (working remotely from abroad), experiential learning options, festivals and volunteering

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	13%
	Into Nature	17%	17%
	Exploration	17%	16%
	Adventure	14%	18%
	Transformation	13%	16%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	20%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	19%	75	20,481
Thailand	34%	36	707
Indonesia	34%	39	467
India	31%	49	1,140
Japan	14%	66	1,120
South Korea	14%	67	1,389
France	14%	68	1,017
Singapore	20%	69	302
China	16%	70	4,595
Taiwan	18%	71	492
UK	17%	71	1,645
Malaysia	20%	72	338
Hong Kong	16%	76	196
New Zealand	18%	77	134
USA	15%	80	3,997
Germany	12%	81	702
Philippines	22%	81	624
Canada	14%	81	892
Vietnam	18%	83	392
Italy	11%	84	331
AUSTRALIANS	15%	81	1,319

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Working holiday or internship (n=4,239)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

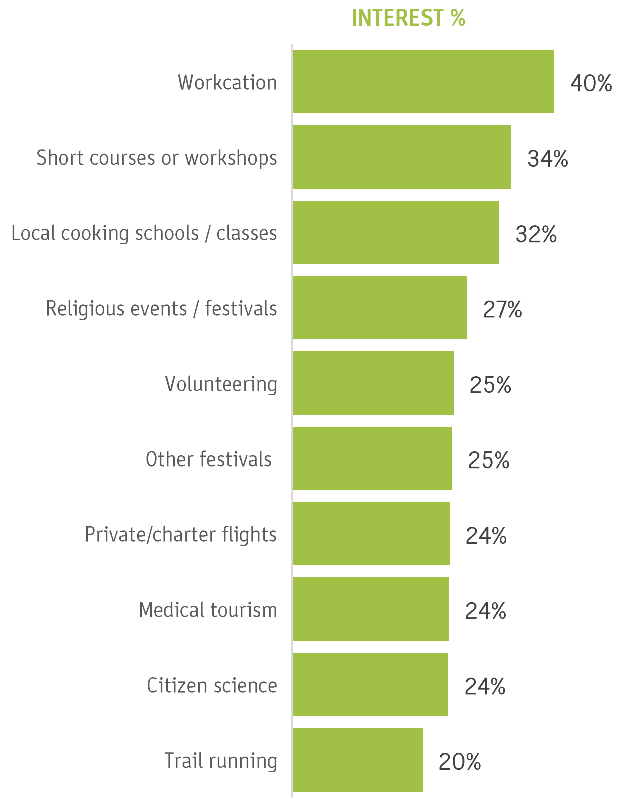
WORKING HOLIDAY OR INTERNSHIP

EXTENDED • TRAVEL +

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	43%
	Older Singles/Couples (45+)	16%	8%
	Young Families	32%	35%
	Older Families	16%	14%
AGE	18-29	30%	42%
	30-39	26%	27%
	40-49	22%	19%
	50-64	22%	12%
	Average age	38	34
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	28%
	Middle	28%	27%
	High	24%	24%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Immerse into the culture of the country
- Opportunity to live like a local, learn the language
- Explore the country slowly

WHY SOME DO NOT

- Not an option for many due to family and company constraints.
- For others, working takes away from the idea of a holiday (to get away from everyday responsibilities).

HERO DESTINATIONS

- USA most consistently, UK, Australia, New Zealand because English-speaking country which will make transition and socialising easier
- Also European destinations such as Spain and France: destinations large enough to keep HYTs busy for long periods

"So I would like to experience other cultures and travel but still progress my career or earn while I am away so my holiday can be prolonged. A working holiday seems to be a great way of combining the two together.

HIGH YIELD TRAVELLER, NEW ZEALAND

A long term holiday is mainly ruled out as neither of us are really in a position to be away from work for a long period of time.

HIGH YIELD TRAVELLER, NEW ZEALAND"

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Working holiday or internship (n=4,239)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

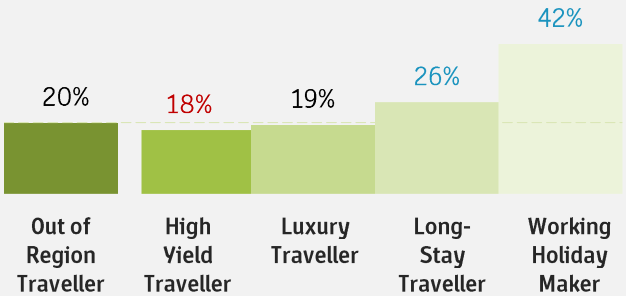
WORKCATION / WORKING FROM ANOTHER COUNTRY

EXTENDED • TRAVEL +

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 1 in 5 Out of Region Travellers are interested in workcations or working from another country
- Interest is greatest among longer-stay audiences and several Eastern markets
- Those interested in workcations have a younger profile, are more inclined to seek transformation and adventure when they travel, and have strong interest in visiting Australia
- Key cross-sell opportunities include immersive learning via short courses and local cooking classes, and other forms of dual-purpose travel

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	16%
	Exploration	17%	18%
	Adventure	14%	16%
	Transformation	13%	17%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	47%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	20%	70	22,302
Vietnam	37%	27	796
China	21%	50	6,085
Malaysia	27%	53	441
South Korea	21%	54	2,078
Philippines	30%	56	830
Italy	18%	63	558
Singapore	21%	64	321
India	26%	67	951
Thailand	22%	69	460
Japan	14%	69	1,068
New Zealand	20%	69	151
Taiwan	19%	69	502
Indonesia	21%	71	287
Hong Kong	16%	74	205
Germany	14%	75	816
Canada	15%	76	955
UK	15%	79	1,438
USA	15%	81	3,839
France	7%	87	522
AUSTRALIANS	16%	75	1,438

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Workcation / working from another country (n=4,406)

● *Significantly higher than those not interested* ● *Significantly lower than those not interested*

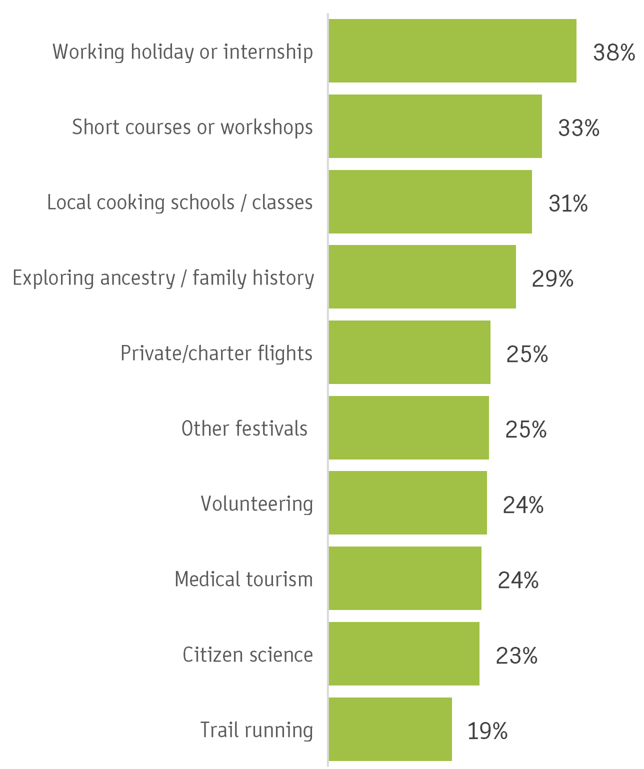
WORKCATION / WORKING FROM ANOTHER COUNTRY

EXTENDED • TRAVEL +

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

DEMOGRAPHIC PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	42%
	Older Singles/Couples (45+)	16%	9%
	Young Families	32%	34%
	Older Families	16%	14%
AGE	18-29	30%	39%
	30-39	26%	27%
	40-49	22%	20%
	50-64	22%	14%
	Average age	38	35
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	25%
	Middle	28%	26%
	High	24%	27%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Immerse into the culture of the country
- Opportunity to live like a local, learn the language
- Explore the country slowly

WHY SOME DO NOT

- Logistics and financials can be stressful e.g., visa
- Difficult to manage especially with children of school age

HERO DESTINATIONS

- Destinations with good infrastructure e.g., healthcare, government stability
- For English speakers, English-speaking countries preferred for ease of transition e.g., UK, Australia, US
- European destinations for ease of travel between countries and desire to learn language e.g., Spain, France

sounds attractive but unfortunately as this point of my life it's not possible. We have children that are very active in school/activities and an old dog that has health problems. Additionally, my wife is on the front line of the pandemic as a first responder. Lastly, I don't know if I could commit that much time to a single location.

HIGH YIELD TRAVELLER, UNITED STATES

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Workcation / working from another country (n=4,406)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

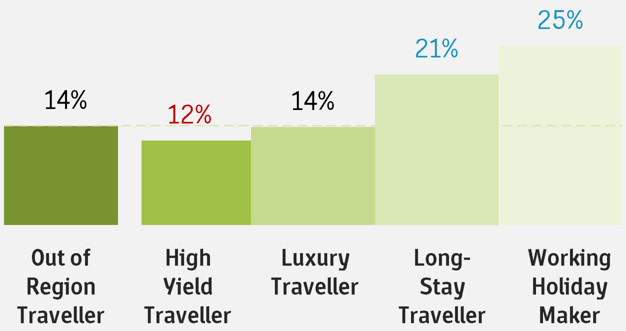
VOLUNTEERING

EXTENDED • TRAVEL +

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 14% of Out of Region Travellers are interested in volunteering experiences, with strongest interest among long-stay audiences
- Those interested in volunteering skew younger, particularly young singles/couples, with lower incomes
- This audience tends to seek adventure and transformative travel, and has strong consideration for Australia
- Strongest interest in environmental and wildlife volunteering opportunities specifically, followed by working with children or orphanages
- Strong cross-sell opportunities with learning and personal journey experiences

INTEREST IN THE EXPERIENCE BY SEGMENT

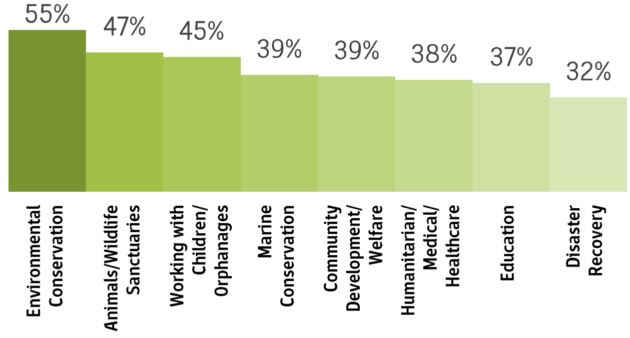


	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	13%
	Into Nature	17%	16%
	Exploration	17%	17%
	Adventure	14%	19%
	Transformation	13%	16%
	Passion, hobbies	14%	14%
	Restoration	7%	4%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	14%	85	16,214
New Zealand	18%	73	136
Italy	14%	74	440
Malaysia	18%	77	304
France	12%	77	865
Vietnam	20%	77	429
India	19%	80	685
Singapore	15%	80	231
Indonesia	16%	81	215
Philippines	21%	82	589
UK	14%	82	1,381
USA	14%	82	3,805
South Korea	8%	84	762
Hong Kong	12%	84	147
Germany	8%	84	469
Japan	8%	84	655
China	13%	84	3,800
Taiwan	9%	85	241
Canada	13%	85	809
Thailand	12%	86	249
AUSTRALIANS	15%	82	1,291

INTEREST IN SUB-EXPERIENCES



fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Volunteering (n=3,119)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

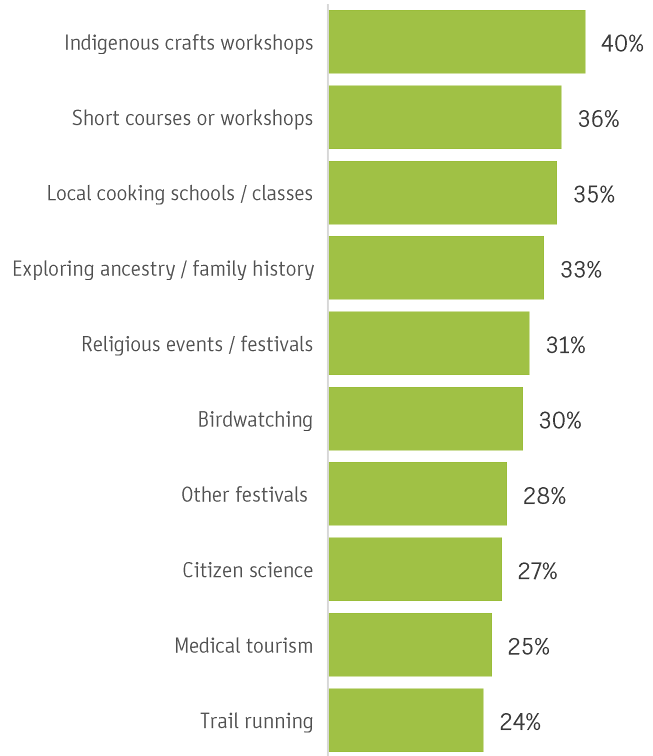
VOLUNTEERING

EXTENDED • TRAVEL +

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	40%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	33%
	Older Families	16%	14%
AGE	18-29	30%	39%
	30-39	26%	25%
	40-49	22%	17%
	50-64	22%	19%
	Average age	38	36
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	29%
	Middle	28%	27%
	High	24%	22%
	Very high	22%	22%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Immerse into the culture while giving back
- Slow travel and learn more about the destination, people, wildlife, etc.

WHY SOME DO NOT

- Do not have enough time
- Uncertainty about the legitimacy of the cause
- Not interested in "doing work" while on holiday

HERO DESTINATIONS

- Various destinations with particular interests and causes

Helping out locally is very rewarding, it would be a very unique experience, it would have to be done in a way that actually benefitted a community though and not just a fake arranged thing to make people feel good about themselves.

HIGH YIELD TRAVELLER, NEW ZEALAND

I don't feel the need to be the volunteer as I don't know if I will have that much time.

HIGH YIELD TRAVELLER, INDIA

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Volunteering (n=3,119)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

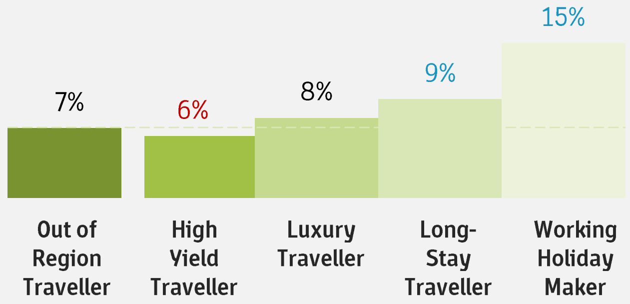
ANIMALS/WILDLIFE SANCTUARIES

EXTENDED • TRAVEL+ • VOLUNTEERING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 7% of Out of Region Travellers are interested in animal or wildlife sanctuary volunteering experiences when they travel, with stronger interest among long-stay audiences
- Those interested in volunteering with animals or at wildlife sanctuaries tend to be younger, with skews towards females and singles/couples, and more likely to be motivated by adventure and transformation
- This audience has particularly strong consideration and intention to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	7%	7,609
Vietnam	11%	231
India	10%	355
New Zealand	9%	66
Malaysia	8%	138
Philippines	8%	222
Indonesia	8%	105
Singapore	7%	112
UK	7%	684
USA	7%	1,839
Italy	7%	210
Thailand	6%	132
Canada	6%	375
China	6%	1,607
Hong Kong	5%	68
France	5%	352
Taiwan	5%	122
Japan	4%	299
Germany	4%	211
South Korea	3%	275
AUSTRALIANS	7%	657

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	41%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	33%
	Older Families	16%	13%
AGE	18-29	30%	39%
	30-39	26%	26%
	40-49	22%	18%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	44%
	Female	50%	56%
INCOME	Low	25%	29%
	Middle	28%	26%
	High	24%	22%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	12%
	Into Nature	17%	18%
	Exploration	17%	17%
	Adventure	14%	18%
	Transformation	13%	17%
	Passion, hobbies	14%	14%
	Restoration	7%	4%
Consideration of Australia		37%	52%
Actively planning to visit Australia		15%	23%

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Animals/wildlife sanctuaries (n=1,463)

Significantly higher than those not interested

Significantly lower than those not interested

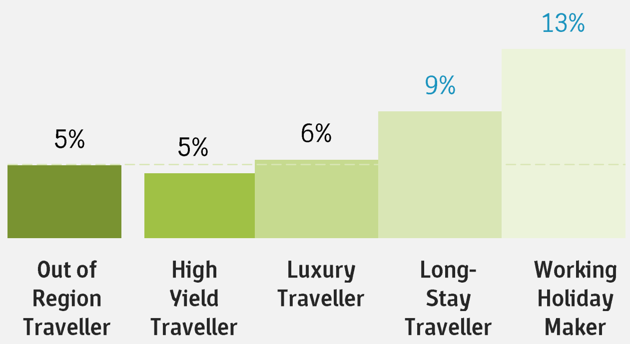
EDUCATION

EXTENDED • TRAVEL + • VOLUNTEERING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 5% of Out of Region Travellers are interested in volunteering in education when they travel
- Interest is stronger among long-stay segments audiences, as well as several Eastern markets and New Zealand
- Those interested in volunteering in education skew heavily younger, particularly singles/couples, with lower incomes and more likely to be motivated by adventure and transformation
- This audience has particularly strong consideration and intention to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	5%	5,957
Philippines	11%	296
Vietnam	8%	173
India	8%	277
Indonesia	7%	95
New Zealand	7%	49
Malaysia	6%	100
Singapore	5%	84
China	5%	1,421
UK	5%	466
USA	5%	1,247
Canada	4%	268
Hong Kong	4%	54
Italy	4%	132
Thailand	4%	83
Taiwan	4%	104
France	3%	250
Germany	3%	148
Japan	2%	197
South Korea	2%	239
AUSTRALIANS	5%	444

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	43%
	Older Singles/Couples (45+)	16%	9%
	Young Families	32%	34%
	Older Families	16%	13%
AGE	18-29	30%	43%
	30-39	26%	24%
	40-49	22%	18%
	50-64	22%	15%
	Average age	38	34
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	29%
	Middle	28%	26%
	High	24%	22%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	12%
	Into Nature	17%	15%
	Exploration	17%	18%
	Adventure	14%	20%
	Transformation	13%	17%
	Passion, hobbies	14%	14%
	Restoration	7%	4%
Consideration of Australia		37%	50%
Actively planning to visit Australia		15%	23%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Education (n=1,125)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

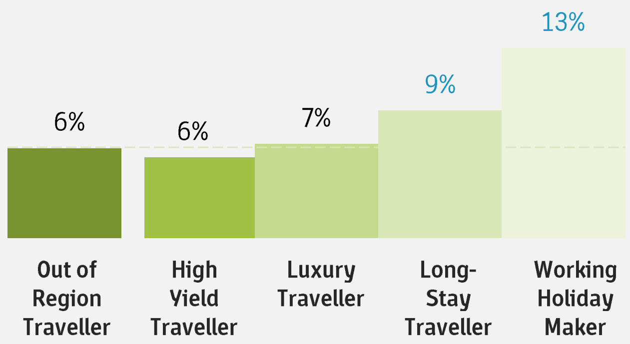
WORKING WITH CHILDREN/ORPHANAGES

EXTENDED • TRAVEL + • VOLUNTEERING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 6% of Out of Region Travellers are interested in volunteering with children/at orphanages when they travel
- Interest is stronger among long-stay segments, as well as several South/South East Asian markets
- Those interested in working with children/orphanages tend to be younger, particularly females, with lower incomes and more likely to be motivated by adventure and transformation
- This audience has particularly strong consideration and intention to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	6%	7,372
Vietnam	13%	280
Philippines	11%	307
India	10%	352
Singapore	8%	124
Indonesia	8%	108
New Zealand	8%	57
Malaysia	7%	123
Italy	7%	220
UK	6%	545
China	5%	1,493
Canada	5%	301
USA	5%	1,239
France	5%	347
Taiwan	5%	123
Thailand	4%	94
Hong Kong	4%	55
South Korea	4%	345
Germany	3%	195
Japan	3%	259
AUSTRALIANS	6%	542

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	38%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	36%
	Older Families	16%	14%
AGE	18-29	30%	39%
	30-39	26%	23%
	40-49	22%	19%
	50-64	22%	19%
	Average age	38	36
GENDER	Male	50%	40%
	Female	50%	60%
INCOME	Low	25%	29%
	Middle	28%	26%
	High	24%	24%
	Very high	22%	21%
TRAVELLER MOTIVATIONS	Reconnection	17%	15%
	Into Nature	17%	16%
	Exploration	17%	18%
	Adventure	14%	17%
	Transformation	13%	17%
	Passion, hobbies	14%	13%
	Restoration	7%	4%
Consideration of Australia		37%	50%
Actively planning to visit Australia		15%	23%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Working with children/orphanages (n=1,372)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

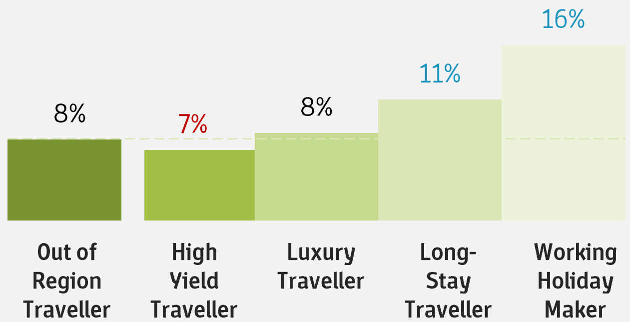
ENVIRONMENTAL CONSERVATION

EXTENDED • TRAVEL+ • VOLUNTEERING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 8% of Out of Region Travellers are interested in environmental conservation volunteering experiences, with greater interest among long-stay audiences
- Several South/South East Asian markets show higher interest in this experience
- Those interested in volunteering in environmental conservation tend to be younger and more likely to be motivated by getting into nature, as well as adventure and transformation needs
- This audience has strong consideration and intention to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	8%	8,837
Philippines	14%	388
Vietnam	13%	287
Malaysia	12%	195
Indonesia	11%	149
India	11%	394
Thailand	8%	171
Singapore	8%	120
China	8%	2,220
Italy	7%	214
New Zealand	7%	51
USA	7%	1,764
Hong Kong	7%	83
UK	6%	595
Taiwan	6%	150
Japan	5%	375
France	5%	350
Canada	5%	285
Germany	4%	221
South Korea	3%	329
AUSTRALIANS	7%	647

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	39%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	34%
	Older Families	16%	15%
AGE	18-29	30%	37%
	30-39	26%	26%
	40-49	22%	18%
	50-64	22%	18%
	Average age	38	36
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	28%
	Middle	28%	26%
	High	24%	23%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	13%
	Into Nature	17%	19%
	Exploration	17%	18%
	Adventure	14%	16%
	Transformation	13%	16%
	Passion, hobbies	14%	14%
	Restoration	7%	4%
Consideration of Australia		37%	48%
Actively planning to visit Australia		15%	22%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Environmental conservation (n=1,646)

● Significantly higher than those not interested

● Significantly lower than those not interested

TOURISM AUSTRALIA

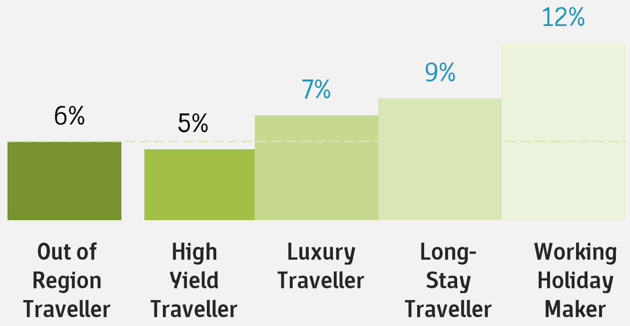
MARINE CONSERVATION

EXTENDED • TRAVEL + • VOLUNTEERING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 6% of Out of Region Travellers are interested in marine conservation volunteering experiences when they travel
- Interest is stronger among Luxury Travellers and long-stay segments, as well as several Eastern markets
- Those interested in volunteering in marine conservation tend to be younger and more likely to be motivated by adventure and transformation
- Half of this audience is considering a holiday to Australia in the next 4 years, with almost a quarter planning to visit in the next 2 years

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	6%	6,398
Vietnam	11%	232
Philippines	10%	267
China	7%	2,060
India	7%	257
Indonesia	7%	93
Malaysia	7%	113
Thailand	6%	132
New Zealand	6%	46
Hong Kong	6%	70
Singapore	6%	87
UK	5%	523
Taiwan	4%	114
Canada	4%	240
USA	4%	989
France	3%	248
Italy	3%	104
Germany	3%	187
Japan	3%	229
South Korea	2%	244
AUSTRALIANS	5%	441

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	39%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	35%
	Older Families	16%	15%
AGE	18-29	30%	38%
	30-39	26%	26%
	40-49	22%	18%
	50-64	22%	19%
	Average age	38	36
GENDER	Male	50%	48%
	Female	50%	52%
INCOME	Low	25%	25%
	Middle	28%	26%
	High	24%	24%
	Very high	22%	24%
TRAVELLER MOTIVATIONS	Reconnection	17%	11%
	Into Nature	17%	19%
	Exploration	17%	15%
	Adventure	14%	18%
	Transformation	13%	18%
	Passion, hobbies	14%	16%
	Restoration	7%	3%
Consideration of Australia		37%	50%
Actively planning to visit Australia		15%	23%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Marine conservation (n=1,207)

● *Significantly higher than those not interested*　● *Significantly lower than those not interested*

TOURISM AUSTRALIA

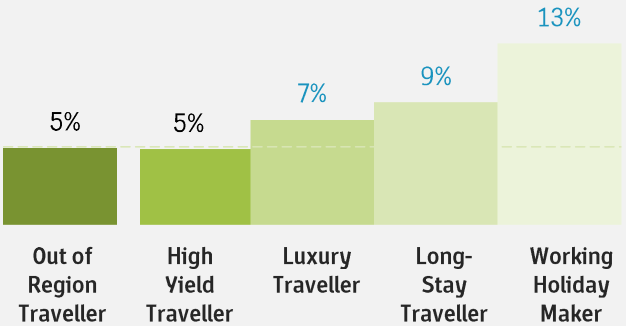
COMMUNITY DEVELOPMENT/WELFARE

EXTENDED • TRAVEL + • VOLUNTEERING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 5% of Out of Region Travellers are interested in community development/welfare volunteering experiences when they travel
- Interest is stronger among Luxury Travellers and long-stay segments, as well as several Eastern markets and New Zealand
- Those interested in volunteering in community development/welfare tend to be younger, with lower incomes and more likely to be motivated by adventure and transformation
- This audience has particularly strong consideration and intention to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	5%	6,305
Malaysia	10%	161
Vietnam	10%	204
Philippines	9%	259
New Zealand	8%	59
India	7%	271
Indonesia	7%	97
Singapore	7%	106
UK	6%	536
China	5%	1,576
USA	5%	1,402
Canada	5%	309
Hong Kong	4%	49
Thailand	4%	77
Italy	4%	110
Taiwan	3%	88
France	3%	199
South Korea	3%	249
Japan	2%	181
Germany	2%	119
AUSTRALIANS	5%	436

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	38%
	Older Families	16%	12%
AGE	18-29	30%	39%
	30-39	26%	25%
	40-49	22%	19%
	50-64	22%	17%
	Average age	38	36
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	30%
	Middle	28%	25%
	High	24%	20%
	Very high	22%	24%
TRAVELLER MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	16%
	Exploration	17%	17%
	Adventure	14%	18%
	Transformation	13%	17%
	Passion, hobbies	14%	15%
	Restoration	7%	3%
Consideration of Australia		37%	53%
Actively planning to visit Australia		15%	25%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Community development/welfare (n=1,217)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

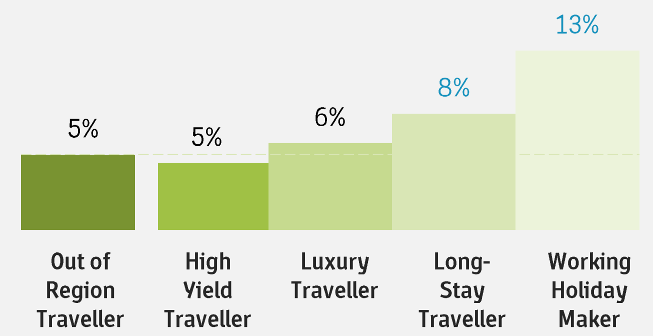
HUMANITARIAN/MEDICAL/HEALTHCARE

EXTENDED • TRAVEL + • VOLUNTEERING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 5% of Out of Region Travellers are interested in humanitarian, medical or healthcare volunteering experiences abroad, with more interest from long-stay audiences
- Stronger interest from a number of Eastern markets, as well as Italy
- Those interested in this experience skew younger, female, and lower-income, and more likely to be motivated by and transformation
- This audience has strong consideration and intention to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	5%	6,110
Vietnam	10%	221
Malaysia	9%	146
Philippines	7%	206
India	7%	269
Italy	7%	209
Indonesia	7%	92
New Zealand	6%	47
France	6%	426
USA	5%	1,417
UK	5%	486
Canada	5%	307
Singapore	4%	68
China	4%	1,238
Hong Kong	4%	48
Taiwan	3%	89
Thailand	3%	65
Japan	2%	196
Germany	2%	115
South Korea	2%	162
AUSTRALIANS	5%	444

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	39%
	Older Singles/Couples (45+)	16%	12%
	Young Families	32%	36%
	Older Families	16%	13%
AGE	18-29	30%	41%
	30-39	26%	25%
	40-49	22%	17%
	50-64	22%	18%
	Average age	38	35
GENDER	Male	50%	42%
	Female	50%	58%
INCOME	Low	25%	30%
	Middle	28%	24%
	High	24%	23%
	Very high	22%	23%
TRAVELLER MOTIVATIONS	Reconnection	17%	12%
	Into Nature	17%	16%
	Exploration	17%	19%
	Adventure	14%	17%
	Transformation	13%	17%
	Passion, hobbies	14%	14%
	Restoration	7%	4%
Consideration of Australia		37%	49%
Actively planning to visit Australia		15%	23%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Humanitarian/medical/healthcare (n=1,158)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

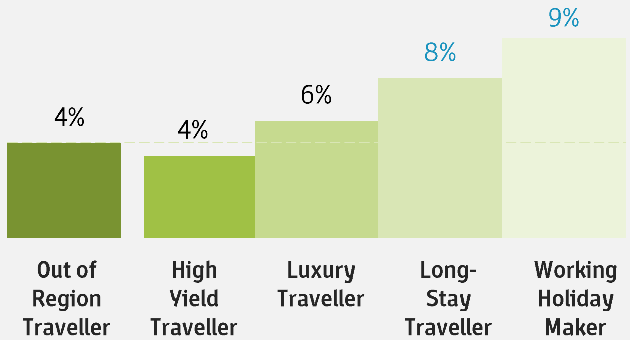
DISASTER RECOVERY

EXTENDED • TRAVEL + • VOLUNTEERING

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 4% of Out of Region Travellers are interested in volunteering in disaster recovery, with more interest from long-stay audiences
- South East Asian markets show higher interest in this experience, but China and the US represent the largest volumes
- Those interested in volunteering in disaster recovery tend to be younger and more likely to be motivated by adventure and transformation
- This audience has strong consideration and intention to visit Australia

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	SIZING ('000)
GLOBAL	4%	5,172
Philippines	8%	234
Malaysia	8%	131
Indonesia	8%	103
Vietnam	7%	149
New Zealand	5%	39
Thailand	5%	107
India	5%	186
Canada	5%	287
China	4%	1,172
Singapore	4%	62
USA	4%	1,015
Italy	4%	118
France	4%	277
UK	4%	357
South Korea	3%	263
Japan	2%	182
Taiwan	2%	53
Hong Kong	2%	24
Germany	2%	100
AUSTRALIANS	5%	464

DEMOGRAPHIC AND TRAVEL BEHAVIOUR PROFILE

		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	37%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	39%
	Older Families	16%	14%
AGE	18-29	30%	39%
	30-39	26%	27%
	40-49	22%	18%
	50-64	22%	16%
	Average age	38	35
GENDER	Male	50%	46%
	Female	50%	54%
INCOME	Low	25%	28%
	Middle	28%	25%
	High	24%	21%
	Very high	22%	27%
TRAVELLER MOTIVATIONS	Reconnection	17%	10%
	Into Nature	17%	16%
	Exploration	17%	18%
	Adventure	14%	19%
	Transformation	13%	18%
	Passion, hobbies	14%	15%
	Restoration	7%	4%
Consideration of Australia		37%	49%
Actively planning to visit Australia		15%	24%

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Disaster recovery (n=966)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

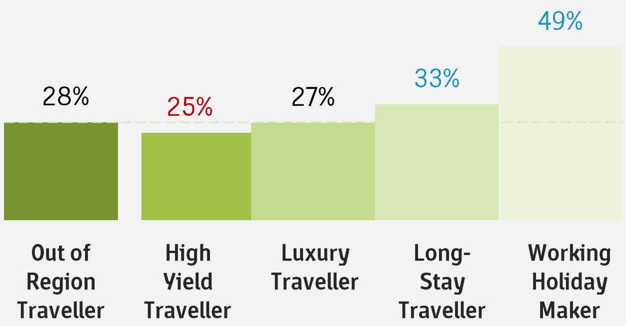
LANGUAGE IMMERSION

EXTENDED • TRAVEL +

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 28% of Out of Region Travellers are interested in language immersion, increasing to almost half of Working Holiday Makers
- Several South/South East Asian markets have stronger interest levels, as well as Germany and Italy, while most English-speaking markets are less interested
- Those interested in language immersion have a much younger profile, with lower incomes, and tend to be motivated by exploration and adventure as key travel needs
- Cross-sell options include cultural immersion via Indigenous experiences or local homestays, and dual-purpose travel such as workcations

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	14%
	Into Nature	17%	17%
	Exploration	17%	19%
	Adventure	14%	17%
	Transformation	13%	14%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
Consideration of Australia		37%	44%
Actively planning to visit Australia		15%	18%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	27%	47	30,572
Thailand	45%	15	945
Philippines	46%	20	1,285
Vietnam	41%	22	868
Germany	33%	24	1,879
Indonesia	39%	25	536
France	27%	28	2,005
China	25%	32	7,294
Italy	30%	36	940
Japan	21%	42	1,668
Hong Kong	24%	48	305
India	31%	50	1,139
USA	22%	56	5,810
Canada	20%	62	1,232
UK	18%	64	1,769
Malaysia	24%	64	404
Taiwan	21%	65	565
South Korea	15%	66	1,480
Singapore	20%	66	308
New Zealand	19%	72	141
AUSTRALIANS	16%	77	1,418

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Language immersion (n=5,946)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

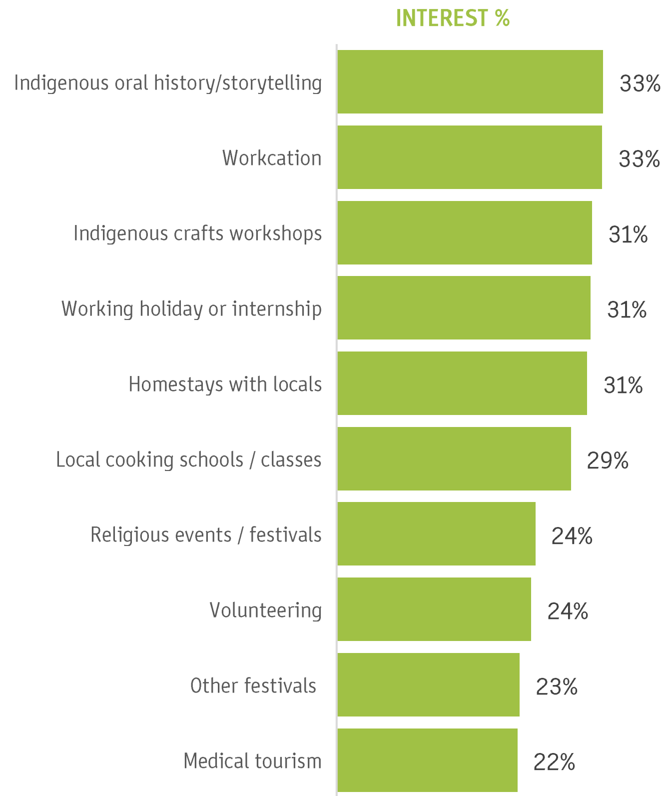
LANGUAGE IMMERSION

EXTENDED • TRAVEL +

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	40%
	Older Singles/Couples (45+)	16%	11%
	Young Families	32%	34%
	Older Families	16%	15%
AGE	18-29	30%	39%
	30-39	26%	27%
	40-49	22%	19%
	50-64	22%	16%
	Average age	38	35
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	27%
	Middle	28%	26%
	High	24%	24%
	Very high	22%	23%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• One step further into being immersed into a culture. • Being able to authentically interact with the locals. • Levelling up/ improving existing language skills.

WHY SOME DO NOT

• Considered to be stressful/ difficult, even a barrier to seamless experiences if comprehension becomes an issue.

HERO DESTINATIONS

• Dependent on language

Spending time with the locals, immersing myself in their culture. I would attempt to learn the language. I want to hear a language, that I don't usually here

HIGH YIELD TRAVELLER, UNITED KINGDOM

I have also really wanted to live in a country that speaks Spanish so that I could immerse myself and learn the language well. If it was in a country where English isn't the main language, it would be good to have language classes.

HIGH YIELD TRAVELLER, NEW ZEALAND

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Language immersion (n=5,946)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

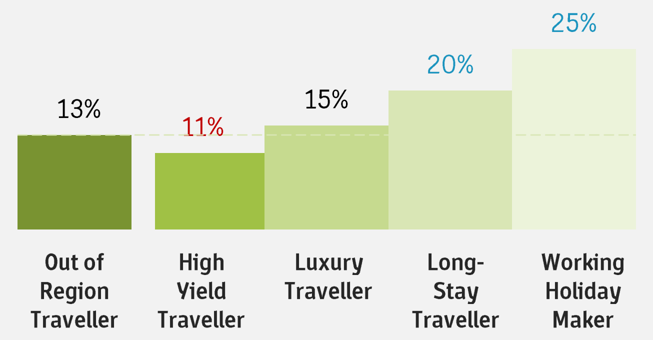
CITIZEN SCIENCE

EXTENDED • TRAVEL +

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall, 13% of Out of Region Travellers are interested in citizen science, with greater interest among longer-stay segments
- Those interested in citizen science tend to be younger, often in young families, with a heavy skew towards males
- This audience is most heavily motivated to travel for adventure and transformation
- Cross-sell opportunities include Indigenous history and craft workshops, ancestry, birdwatching, festivals and volunteering

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	12%
	Into Nature	17%	16%
	Exploration	17%	15%
	Adventure	14%	21%
	Transformation	13%	16%
	Passion, hobbies	14%	15%
	Restoration	7%	5%
Consideration of Australia		37%	43%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	13%	87	15,196
Indonesia	24%	64	328
India	24%	72	897
Philippines	26%	75	722
China	14%	77	4,093
Malaysia	18%	78	301
France	11%	79	791
Italy	12%	82	371
Thailand	13%	83	276
Singapore	13%	84	203
Japan	8%	85	654
South Korea	6%	87	616
Germany	8%	87	426
New Zealand	11%	87	80
USA	12%	88	3,147
Vietnam	15%	88	325
Canada	10%	88	630
UK	11%	88	1,055
Taiwan	6%	89	172
Hong Kong	9%	89	110
AUSTRALIANS	10%	88	853

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Citizen science (n=2,977)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

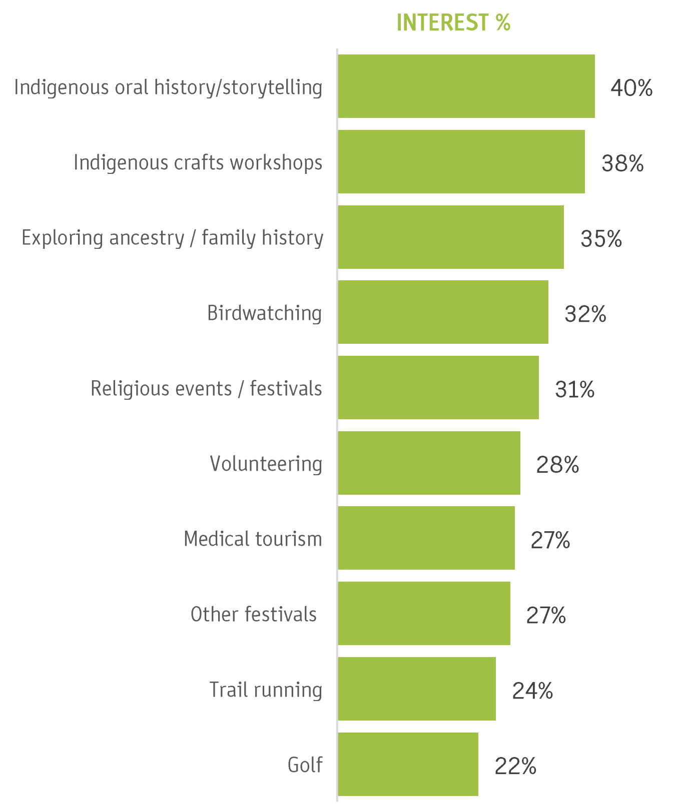
CITIZEN SCIENCE

EXTENDED • TRAVEL +

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	33%
	Older Singles/Couples (45+)	16%	9%
	Young Families	32%	41%
	Older Families	16%	17%
AGE	18-29	30%	36%
	30-39	26%	27%
	40-49	22%	21%
	50-64	22%	16%
	Average age	38	36
GENDER	Male	50%	60%
	Female	50%	40%
INCOME	Low	25%	24%
	Middle	28%	26%
	High	24%	25%
	Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Niche interest among some HYTs who want to do good while travelling and meet like-minded people with similar values e.g., conservation efforts

WHY SOME DO NOT

- Most HYTs across markets perceive this experience too much work/waste of vacation time
- Unfamiliar and abstract travel concept for some to understand what it is

HERO DESTINATIONS

- Great Barrier Reef

I'm not sure what a Citizen Science experience would entail.

HIGH YIELD TRAVELLER, UNITED KINGDOM

Seems like studying more than travelling so not really a vacation activity

HIGH YIELD TRAVELLER, JAPAN

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Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Citizen science (n=2,977)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

EXTENDED

LIVE LIKE A LOCAL

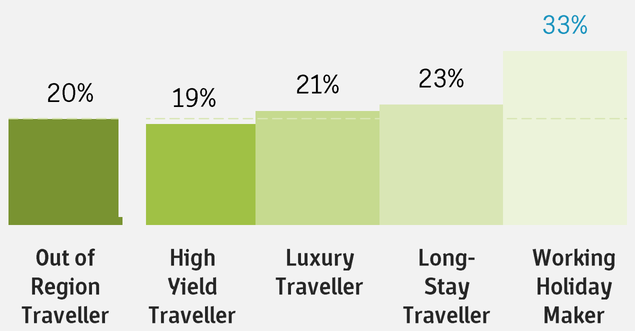
HOMESTAYS WITH LOCAL FAMILIES/COMMUNITIES

EXTENDED • LIVE LIKE A LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 1 in 5 Out of Region Travellers are interested in local homestays, with greater interest from Working Holiday Makers
- This experience attracts greater demand from several South/South East Asian markets, while Western markets find it less appealing
- Those interested in local homestays are more likely to be families and tend to earn higher incomes
- Cross-sell opportunities include socialising with locals, engaging with Indigenous culture, ancestry and religious experiences

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	20%
	Exploration	17%	17%
	Adventure	14%	15%
	Transformation	13%	14%
	Passion, hobbies	14%	13%
	Restoration	7%	5%
Consideration of Australia		37%	46%
Actively planning to visit Australia		15%	21%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	20%	71	19,444
Thailand	39%	24	822
Vietnam	39%	26	835
Indonesia	30%	48	413
Singapore	23%	52	362
India	28%	61	1,027
France	15%	62	1,147
South Korea	16%	64	1,588
Hong Kong	19%	64	242
Malaysia	24%	65	400
Italy	16%	70	483
Japan	11%	76	905
Taiwan	15%	76	396
Germany	14%	78	775
New Zealand	17%	79	130
USA	14%	83	3,752
UK	13%	84	1,241
Canada	13%	86	780
Philippines	18%	86	491
China	13%	86	3,654
AUSTRALIANS	17%	73	1,471

Significantly higher than those not interested

Significantly lower than those not interested

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Homestays with local families/communities (n=4,231)

TOURISM AUSTRALIA

HOMESTAYS WITH LOCAL FAMILIES/COMMUNITIES

EXTENDED • LIVE LIKE A LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

DEMOGRAPHIC PROFILE		GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	32%
	Older Singles/Couples (45+)	16%	13%
	Young Families	32%	36%
	Older Families	16%	18%
AGE	18-29	30%	31%
	30-39	26%	26%
	40-49	22%	22%
	50-64	22%	21%
	Average age	38	38
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	25%
	Middle	28%	25%
	High	24%	26%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)

"Homestay and learning about the connection of locals and the environment - are activities that I find great, but I would prefer to read about it and learn from the locals, without having to be fully immersed in it

HIGH YIELD TRAVELLER, UNITED KINGDOM

I would love to do a homestay with indigenous people for awhile too to experience their way of life!

HIGH YIELD TRAVELLER, SINGAPORE"

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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Homestays with local families/communities (n=4,231)

Significantly higher than those not interested

Significantly lower than those not interested

TOURISM AUSTRALIA

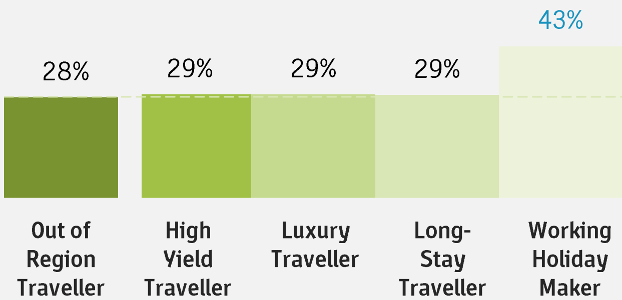
SOCIALISE WITH LOCALS / MAKE LOCAL FRIENDS

EXTENDED • LIVE LIKE A LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- On average, 28% of Out of Region Travellers are interested in socialising with locals and making local friends when they travel
- Working Holiday Makers have the greatest demand for this experience, as well as several South East Asian markets, Italy and New Zealand
- Those interested in this experience tend to seek exploration and adventure from their travels
- Cross-sell opportunities revolve around social and cultural connections, including a range of Indigenous experiences, learning the stories behind the community, local homestays, and nightlife

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	16%
	Exploration	17%	21%
	Adventure	14%	16%
	Transformation	13%	13%
	Passion, hobbies	14%	13%
	Restoration	7%	5%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	28%	42	30,707
Vietnam	37%	29	787
Indonesia	37%	32	498
Philippines	40%	32	1,122
Canada	29%	33	1,821
Italy	32%	33	993
New Zealand	31%	35	235
UK	27%	37	2,606
France	24%	39	1,752
Japan	22%	39	1,728
Malaysia	31%	39	523
Thailand	32%	40	668
Singapore	26%	41	397
India	33%	43	1,193
Taiwan	29%	45	796
South Korea	24%	49	2,316
USA	24%	51	6,268
China	20%	54	5,631
Germany	20%	54	1,120
Hong Kong	20%	61	251
AUSTRALIANS	32%	30	2,778

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Socialise with locals / make local friends (n=6,202)

Significantly higher than those not interested   *Significantly lower than those not interested*

TOURISM AUSTRALIA

SOCIALISE WITH LOCALS / MAKE LOCAL FRIENDS

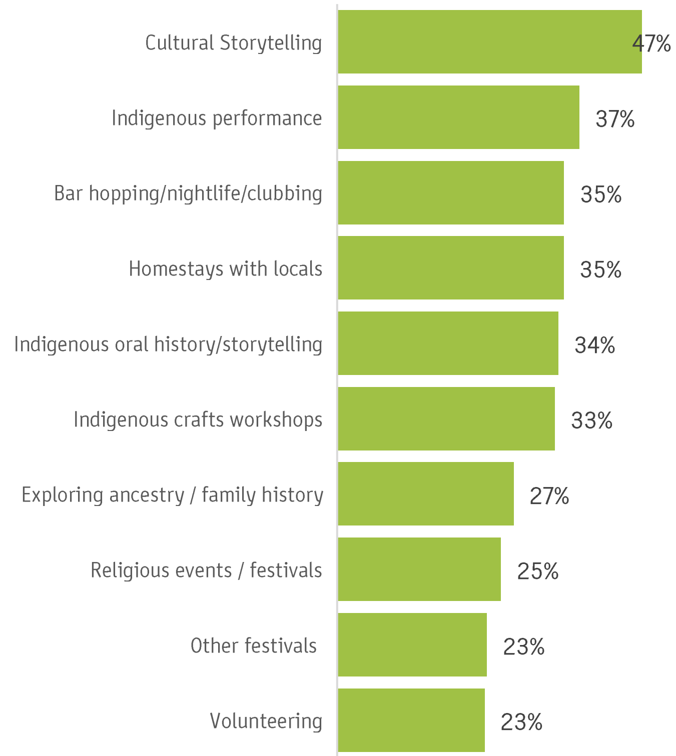
EXTENDED • LIVE LIKE A LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

	DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young Singles/Couples (Under 45)	36%	36%
	Older Singles/Couples (45+)	16%	16%
	Young Families	32%	31%
	Older Families	16%	17%
AGE	18-29	30%	32%
	30-39	26%	25%
	40-49	22%	22%
	50-64	22%	22%
	Average age	38	38
GENDER	Male	50%	49%
	Female	50%	51%
INCOME	Low	25%	24%
	Middle	28%	27%
	High	24%	25%
	Very high	22%	24%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)

INTEREST %



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fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Socialise with locals / make local friends (n=6,202)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

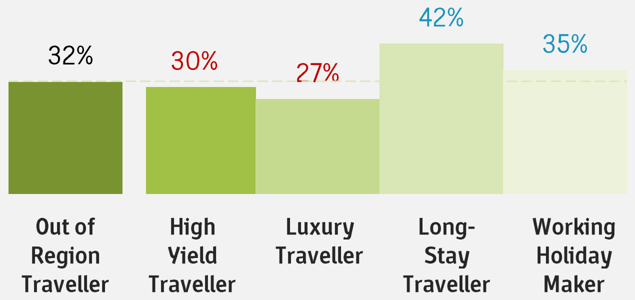
VISITING FRIENDS OR RELATIVES FOR AN EXTENDED PERIOD

EXTENDED • LIVE LIKE A LOCAL

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Almost a third of Out of Region Travellers are interested in visiting friends and relatives for an extended period, with longer-stay segments (particularly Long-Stay Travellers) showing greater demand for this experience, and higher-yielding groups are significantly less interested
- Considerable variation by market, ranging from 14% of Chinese market interested (experience ranked 80th out of 89) to half of New Zealand travellers, where this experience ranked 5th in appeal
- Reconnection is the dominant travel driver among those interested in this experience
- Cross-sell opportunities include local pursuits such as socialising or engaging in community homestays, Indigenous workshops and cooking

INTEREST IN THE EXPERIENCE BY SEGMENT



	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	21%
	Into Nature	17%	15%
	Exploration	17%	17%
	Adventure	14%	15%
	Transformation	13%	12%
	Passion, hobbies	14%	13%
	Restoration	7%	6%
Consideration of Australia		37%	45%
Actively planning to visit Australia		15%	19%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	32%	29	34,527
New Zealand	50%	5	375
India	43%	13	1,560
Philippines	52%	14	1,451
UK	39%	14	3,730
Canada	39%	16	2,429
France	30%	22	2,196
USA	36%	23	9,391
Singapore	32%	28	497
Italy	33%	29	1,023
Germany	32%	29	1,789
Indonesia	35%	37	483
Malaysia	31%	40	509
Hong Kong	26%	44	322
Vietnam	30%	50	632
Taiwan	24%	55	654
South Korea	19%	60	1,839
Japan	15%	64	1,206
Thailand	22%	68	462
China	14%	80	3,980
AUSTRALIANS	41%	14	3,589

fiftyfive5

Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Visiting friends or relatives for an extended period (n=7,055)

● *Significantly higher than those not interested*

● *Significantly lower than those not interested*

TOURISM AUSTRALIA

VISITING FRIENDS OR RELATIVES FOR AN EXTENDED PERIOD

EXTENDED • LIVE LIKE A LOCAL

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	50-64	22%	23%
	Average age	38	38
GENDER	Male	50%	47%
	Female	50%	53%
INCOME	Low	25%	26%
	Middle	28%	27%
	High	24%	25%
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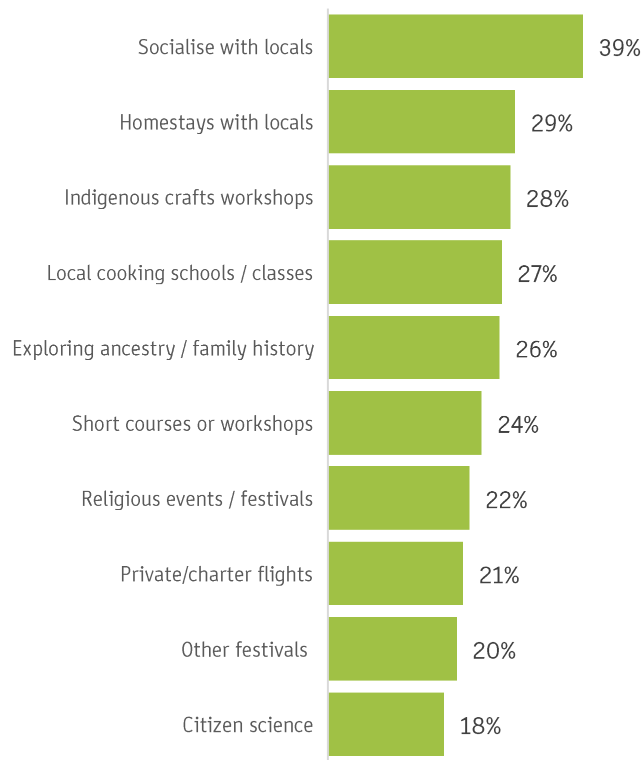
AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

• Ability to reconnect with friends and family on a deeper level than a short trip

WHY SOME DO NOT

• Not an option for many due to family, financial and work constraints.

Long term vacation - this one does feel somewhat out of reach due to us having young kids.

HIGH YIELD TRAVELLER, NEW ZEALAND

Want to spend some time with the family as well as becoming comfortable and familiar with the culture and learning the language

HIGH YIELD TRAVELLER, NEW ZEALAND

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fiftyfive5

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TOURISM AUSTRALIA