November 2022

FUTURE OF GLOBAL TOURISM DEMAND

Global tourism research into the experiences that will drive Australia's tourism demand now and into the future

TOURISM AUSTRALIA

fiftyfive5

TOURISM AUSTRALIA

Tourism Australia acknowledges the Traditional Aboriginal and Torres Strait Islander Owners of the land, sea, and waters of the Australian continent, and recognises their custodianship of culture and Country for over 60,000 years.

FOREWORD AND THANKS

Prior to the pandemic, tourism was Australia's second largest service export, and employed around one in thirteen Australians.[1] In 2018/19, our tourism sector contributed $152 billion to our the economy, supported more than 300,000 businesses, and employed more than 660,000 Australians.[2] There is no denying that Australia's tourism industry is integral to Australia's economy and social fabric.

With so much change in the tourism category over the past two years, this research is very timely. It has been designed to support Australia's tourism industry, across its many facets, to make decisions about where demand exists and ways to maximise the opportunities in this critical period of recovery.

Some might say that tourism is a 'long tail' industry, but I believe this undermines the richness of what tourism represents for Australia, and our visitors. Tourism is a group category with myriad experiences, producers, distributors, and hosts working together to deliver what is truly unique about Australia for each and every visitor.

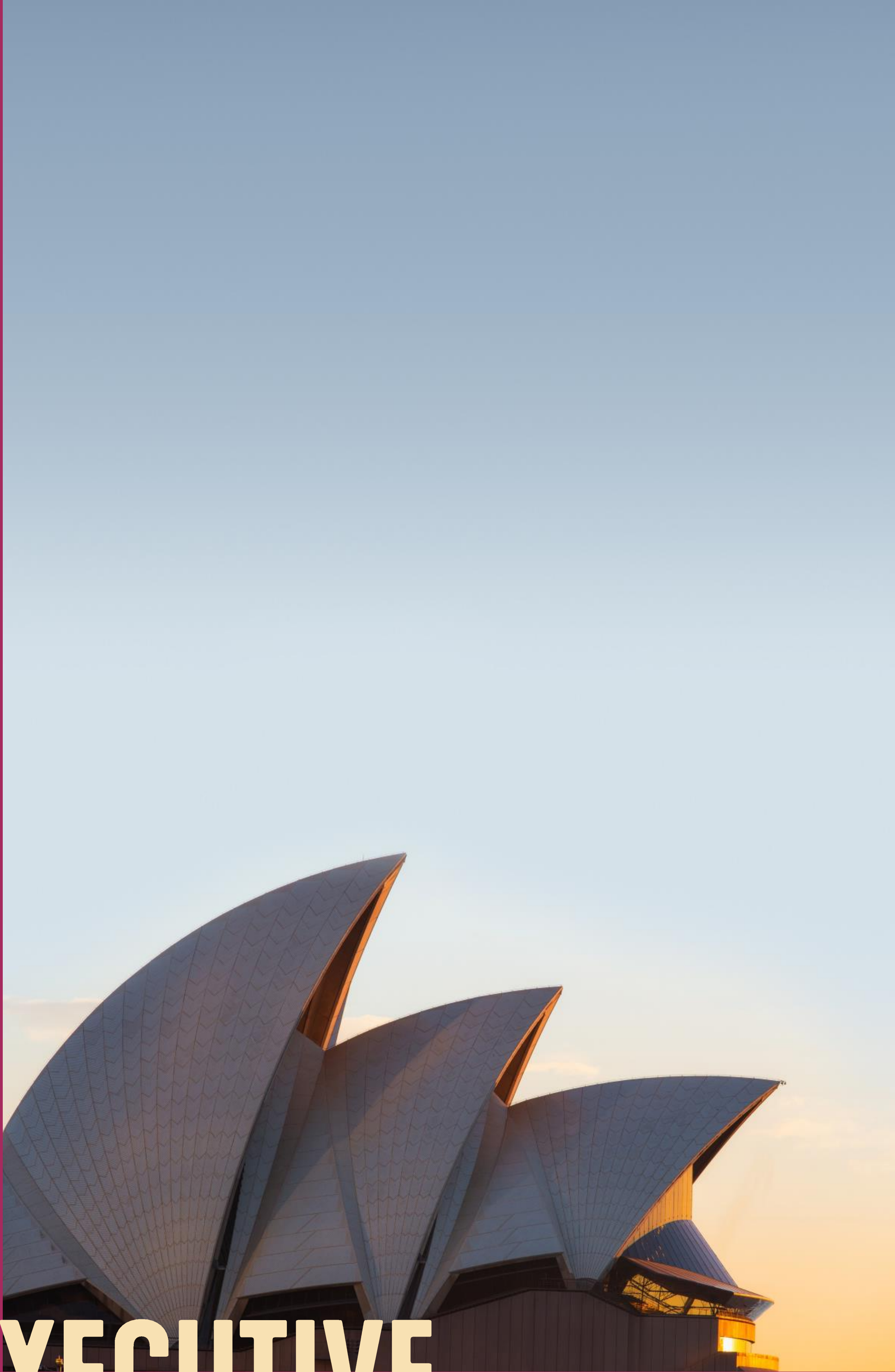
Most tourism businesses are either sole traders or have a small team. Recognising the lean nature of many tourism businesses, we have endeavoured to provide a high level of insights across all sectors. As a result, the nature and scope of this research is quite complex as we have endeavoured to deliver as much richness as possible. The research covers 143 experiences across 20 markets, with key insights summarised to aid review. The various market and experience reviews will be available on tourism.australia.com, along with online tools.

This research was delivered with the support of state and territory tourism organisations, tourism industry operators from across Australia and our key markets, and our research partner Fiftyfive5. 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 assist Australia's tourism industry to be even more competitive on the world stage than ever before.

ROB DOUGAN
Executive General Manager, Strategy and Research

[1] Deloitte Access Economics, 2021, for FY18/19, 'Value of Tourism' paper.
[2] DFAT (International tourism engagement | Australian Government Department of Foreign Affairs and Trade (dfat.gov.au).



EXECUTIVE SUMMARY

COVID-19 – THE GREAT DISCONNECT

As we head out of the travel-restricted pandemic era, many travellers have reframed their desires and expectations when it comes to overseas travel. Short term, COVID-19 and travel restrictions are likely to continue to play a role in destination choice, but there are also shifts which are likely to have a longer-lasting impact.

The Great Disconnect has made many take stock of life’s priorities, vision and purpose, shaping new demand for travel. This research has captured these trends and provides industry with guidance on how to leverage them.

THE POST COVID-19 RECONNECT IS UNDERWAY

If COVID-19 created the Great Disconnect, the post COVID-19 era will be characterised by The Great Reconnect. More than a third of global travellers are motivated to travel to spend quality time with others and/or get in touch with nature. It is recommended that industry position itself to tap into these strong desires to reconnect with people and nature.

- The Reconnection traveller is motivated to spend quality time with loved ones. It's about relaxing and escaping the daily grind of their everyday lives, having fun and enjoying themselves. Initially this is with family and loved ones, but more broadly with friends and people in their close circles.

- The Into Nature traveller is characterised by people motivated to travel in order to get in touch with nature. They want to escape, to feel secure and comfortable, to have a sense of adventure and have a focus on mental and/or physical wellbeing.

EXPLORATION

The Exploration traveller is motivated to explore new destinations and to learn and experience new things about the world. There is also a strong motivation to immerse themselves in a different culture or way of life. This traveller is a key target audience for Indigenous tourism experiences, as well as cultural institutions and attractions.

Indigenous experiences sit alongside Heritage in the minds of travellers. While Indigenous is an important element of Heritage tourism, it's encouraging to see that this is not the only pathway to Indigenous appeal among travellers. In addition, to those interested in Indigenous, we also see Indigenous appeal infused throughout other sectors – such as among foodies who are interested in Indigenous food experiences as a unique style of culinary indulgence.

LOOKING FOR ADVENTURE

Since the pandemic, our lives have become increasingly dull due to restricted movement and lack of travel. As a result, we want to step outside our comfort zones and experience adventures we wouldn't usually engage with. Adventure travellers are motivated to seek destinations and experiences that evoke adventure and thrill seeking. The Adventure traveller is motivated to travel for fun, enjoyment and a strong sense of adventure. They're keen to meet new people, make friends and challenge themselves. They want to make up for lost time, and to get as much out of travel as possible, with highs and thrills and memorable experiences. There are many dimensions - but underlying the Adventure traveller is a need for stimulation and escape. This traveller connects with remoteness and ruggedness, but is also activity oriented, enjoying activities such as white-water rafting, hill climbing, theme parks – a long list with many opportunities for Australia.

WELLNESS ROLLS ON

Wellness and wellbeing are the megatrends of these post-pandemic times. The movement was building prior to COVID-19, but the last few years have accelerated the urgency and demand for wellness. We've all faced challenges, setbacks, grief, fear, uncertainty, a shortage of time, energy, physical and mental space, and it's taken its toll on us. Given pandemic-induced stress and anxiety, many are looking to reset, to re-equilibrate and re-centre.

As a result, people are looking for destinations and experiences to nourish their body, mind, and soul to stave off burn-out and fatigue. Key wellness experiences being sought include holistic health (of body, mind, and spirit); healthy eating; meditation, yoga, and fitness retreats; spa and pampering travel; travel that relaxes the mind, slow travel; and screenless solitude.

UPPING THE ANTE ON FOOD AND DRINK

As they emerge from lockdown, travellers are seeking culinary adventures, to sample authentic cuisines, ingredients, and drinks from around the world and to dive deep into a kaleidoscope of flavours, textures, and the stories of people, process and place that go into them.

Australia produces some of the finest produce and cuisine in the world but is not well known for or associated with it compared to other destinations. We don't need to do it better; we need to talk about it more! Of the experiences tested, food and drink was a popular experience sought by travellers from many markets. Dining out, food and drink festivals, Indigenous food experiences and tasting trails are also of interest.

There is a stronger focus on enjoyment via good food and drink, sightseeing and culture. The multiple wine regions, each with their distinctive character and wines, in natural landscapes, along with craft beer offerings and liquor tours in urban settings. Experiences that celebrate our ancient Indigenous culture or the modern blended diverse cultures and bring art, music, food, drink, history, and people. A chance to do all of this in beautiful settings is desired.

SUSTAINABILITY

Sustainability is front and centre of the global psyche, shaping demand for low-carbon footprint travel options and experiences that touch the earth and its communities lightly, leaving places and people better off than when they arrived. It's no longer just about preserving the Earth's precious resources; it is increasingly about regenerating what is lost and deeply honouring what is left.

More than 75 per cent of travellers are committed to sustainability in some way, particularly the Devotees and Believers, which globally account for more than 1 in 3 travellers but as many as half in South-East Asian markets such as Thailand and the Philippines. Sustainability is increasingly influencing traveller choices in terms of where to go, how to get there, where to stay and which experiences they engage with at the destination. However, it is not always easy for travellers to recognise sustainable options. This is a significant opportunity for Australia and Australian tourism operators to educate and ensure understanding and awareness is raised and their sustainability impact is championed.

INDIGENOUS TOURISM

Indigenous tourism represents a nascent opportunity for Australia to tap into the latent demand. Indigenous tourism can provide authenticity and first-hand experiences from a destination's first people, who offer unbroken lineage to place and rich repositories of culture, language, and philosophy. It offers a chance to learn new ways of experiencing a destination, culture, and community.

Indigenous tourism has a natural fit with certain experiences and can be unlocked by building trust and with a focus on cultural immersion. Indigenous businesses and Indigenous-led partnerships will be critical to meeting demand in a way that balances respect with best-practice customer experiences. Australia is not yet well known for Indigenous tourism, and indeed awareness of Indigenous experiences is limited globally. However, once exposed to the opportunity, potential visitors recognise the value that an Indigenous lens can add, especially when paired with appealing experiences that can be authentically delivered in Australia and play to our strengths: natural environment, wildlife, coastal, and agritourism.

ACCESSIBILITY

A quarter of out-of-region travellers have some form of accessibility need when travelling, which has a big impact on all aspects of their travel choices, including the choice of destination. This goes beyond physical or visibly noticeable impairments and extends into any mobility, visual, audio, or cognitive impairment. Whilst younger families have a higher incidence of accessibility needs themselves or within their travel party, accessibility needs affect all ages, life stages and traveller demand segments. Travellers with accessibility needs are seeking a range of experiences and are more often travelling for adventure, transformation, and to engage in passions/hobbies. Ultimately, they are also travelling for similar purposes to those without accessibility needs, that is to relax, have fun and explore new destinations.

These accessibility needs have a significant influence on all aspects of travel choice, with the biggest impact on the choice of destination, transport and the activities and experiences undertaken. As a result, travellers with accessibility needs tend to have longer vacations and bigger travel parties, including carers or on organised tours. Accommodation budgets often stretch into the luxury and premium level. The Australian tourism industry has made progress towards recognising and elevating the importance of this sizable and often under-served segment of the visitor economy, including improving facilities and visibility of information. It is critical we continue and amplify this focus to ensure our destinations, products and services are accessible to all people, regardless of physical and other limitations, disabilities, or age.

COLLABORATION AND PERSONALISATION

Travellers enjoy drawing from multiple experiences within and across sectors. Understanding the underlying patterns in traveller appeal for experiences unlocks opportunities to cross-sell experiences Operators can use this knowledge to develop partnerships around these adjacencies and build out compelling touring trails or itinerary packaging tailored to audience desires.

This form of collaboration is mutually beneficial for operators by amplifying their visibility; it elevates Australia's destinations by showcasing hidden gems and promoting greater spend on experiences in-region; and it's a win for the traveller who experiences more of Australia's incredible product offering, personalised to the styles of experience they love.

AUSTRALIA STILL A DREAM DESTINATION

The pandemic has changed many things, but not Australia's position as one of the most aspirational, dream destinations on the planet. Our natural environment, coastline and wildlife continue to be highly sought-after experiences for many travellers, and experiences that Australia is famous for delivering.

The natural environment is a hero experience for Australia. It attracts a lot of interest from out-of-region travellers and is a strength for Australia compared to most other destinations. Australia has numerous visually impactful landscapes and landmarks, from iconic Uluru to the lesser known but highly impactful and appealing landscapes such as Purnululu National Park.

Another widely popular experience territory is aquatic and coastal, which is particularly appealing to several markets in Europe, the UK, and North America. Australia's 34,000 km of coastline offers a huge variety of potential experiences to promote, from stunning coastal landscapes to high adrenaline water sports.

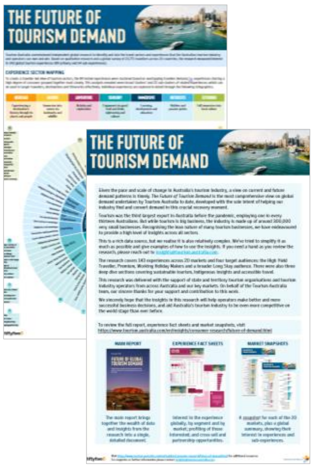
Wildlife experiences hold above-average interest among out-of-region travellers and are a key strength for Australia, given our unique and varied native animals. Wildlife experiences are of particular appeal for travellers from India, the UK, France, New Zealand and Singapore.

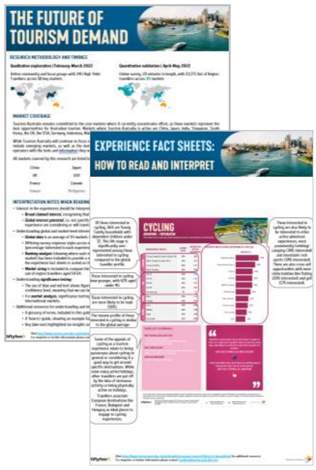
INDUSTRY TOOLS AND RESOURCES

This public report is supported by three additional resources to allow industry and operators to leverage the findings and conclusions from this research.

HOW TO USE THE REPORT

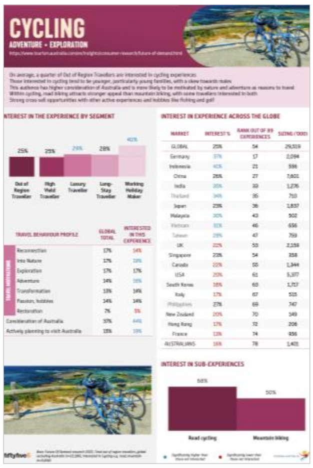
A guide to using the Future of Demand materials, including project information, glossary and interpretation notes for the experience and market snapshots.

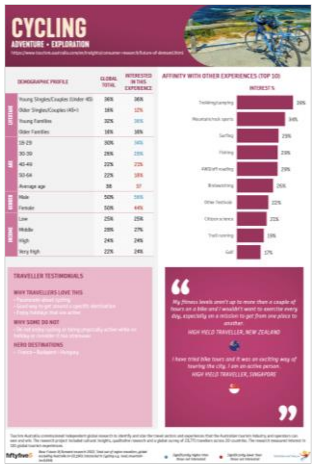




EXPERIENCE FACT SHEETS

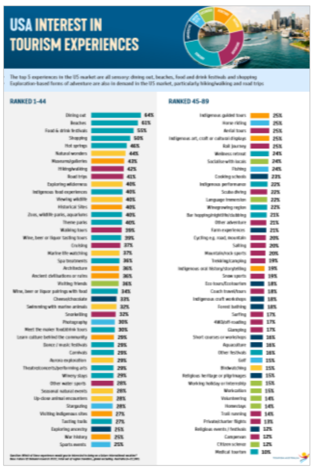
Dedicated snapshots by granular experience, to be used by industry to assess demand globally, by segment and by market, understand the audience profile, and identify cross-sell and partnership opportunities.

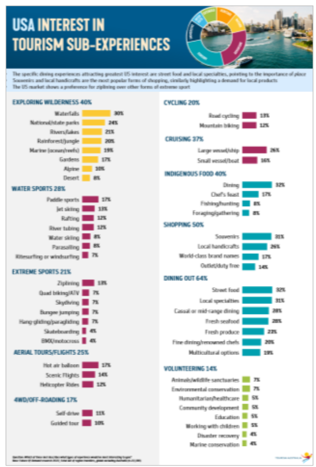




MARKET SNAPSHOTS

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





Visual description:
Industry tools and resources.

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ABOUT THIS REPORT

BACKGROUND

2020-2022 has been one of the most challenging periods in Australian tourism's history. No one could have anticipated the length or scale of the COVID-19 pandemic when it first hit in early 2020, particularly as tourism was still reeling from the impacts of the 2019-20 Summer Bushfires. The extended nature of the pandemic continues to inhibit recovery and continues to cause significant financial distress to many tourism businesses and communities around the country.

Tourism is an important pillar within Australia's economy, and one of its fastest-growing sectors prior to the onset of the COVID-19 pandemic. Before the pandemic, tourism employed 1 in 13 Australians and was Australia's second largest service export.[3]

Devastating though it has been for the industry, COVID-19 may provide Australian tourism with the ability to 'build back better', potentially providing Australia with a competitive advantage as international travel resumes. Australia was a highly competitive destination before the pandemic, and it will be after. High levels of awareness and consideration are the result of Australia's natural benefits, innovative tourism industry, and friendly, welcoming people. None of this has changed. Australia's tourism industry is however facing a more competitive recovery period where the battle for the world's travellers will be more hotly contested than ever before.

Alongside our immediate recovery focus, we are committed to ensuring the Australian tourism industry remains competitive into the future by continuing to drive long-term demand today. Key priorities in this space include instilling richer meaning into our There's nothing like Australia platform by focusing on the most desirable, memorable, and motivating elements of our Australian way of life in a way that is relevant in a post COVID-19 world.

Our global brand campaign launched in October 2022 with a refreshed creative idea in Come And Say G'day, under the existing There's nothing like Australia platform, reflecting changes in consumer perception and demand. The single idea aims to set Australia apart and can be nuanced by market, inviting the world to experience why Australia is best positioned to give them the holiday the world needs and deserves.

[3] Deloitte Access Economics, 2021, for FY18/19, 'Value of Tourism' paper.

As Tourism Australia and our industry upweight the strategic priorities of sustainability and Indigenous tourism, Australia is also increasingly well positioned to tap into rising consumer desire to travel better and with greater purpose and connection.

Through key ongoing research programs such as our Travel Sentiment Tracker, Consumer Demand Project and Domestic Monthly Tracker, Tourism Australia monitors consumer confidence and sentiment towards Australia and the travel landscape and has gathered an array of insights on what travellers around the world consider important in destination choice, how Australia and competitors are perceived in our key markets and how perceptions and importance factors have changed over time. Tourism Australia has previously conducted research delving into experiences and travel sectors; however, not to the scale undertaken with this research and not for some time. Most recently this was undertaken as market-by-market deep-dives for key markets (China, India, and Japan in 2018-19).

Two key challenges were evident in late 2021, requiring Tourism Australia to undertake large-scale consumer research into the future of tourism demand:

01 COVID-19 as a global 'reset moment', disrupting existing trends and challenging long-held assumptions. This necessitated a broad understanding of the sectors and experiences driving travel demand now and into the future.

02 A need for greater depth of insight into three crucial areas of increasing priority for Tourism Australia: sustainability, Indigenous, and inclusive tourism.

OBJECTIVES

Specifically, the research objectives of the Future of Global Tourism Demand project were to:

01

Develop a robust understanding and definition of the travel sectors and experiences consumers are seeking as they return to travel, and whether/how these may have shifted because of the COVID-19 pandemic.

02

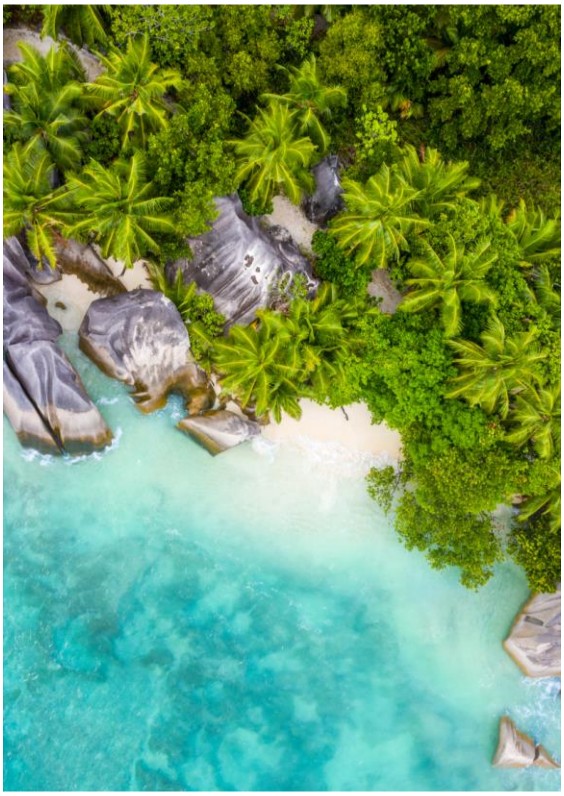
Understand in detail the role of Indigenous tourism – demand, perceptions, and gaps and opportunities, both in knowledge/awareness and in available tourism experiences.

03

Deepen our understanding of the traveller association and expectation of sustainability across and within tourism experiences.

04

Determine the value potential of Indigenous and sustainable tourism experiences.



07

Understand how Australia compares to competing destinations in terms of these existing and emerging travel sectors/experiences. A strong competitive lens was key, ensuring that the research was not self-servingly Australia-centric but rather helps us objectively assess our current and potential opportunity, share of yield, and identify key competitors and respective strengths and weaknesses.

06

Size and profile the sectors, including identifying which audiences (demographics and cohorts) have the greatest demand for these travel sectors and experiences, and whether they will be willing to travel to Australia to experience them.

PROJECT OUTCOME

The Future of Global Tourism Demand project highlights the experiences that will drive Australia's tourism demand now and into the future, with a key focus on sustainable, Indigenous, and inclusive tourism. Ultimately, delivering insights that the Australian tourism industry can leverage to grow and prosper. It will be leveraged by Tourism Australia to guide strategy and provide an information source to assist state and territory tourism organisations, peak bodies, and operators to create experiences and communicate to key markets.

PROJECT ROADMAP

A robust and comprehensive research process was undertaken between December 2021 and June 2022 in a collaborative partnership between Tourism Australia and our specialist research agency Fiftyfive5. This process engaged close to 24,000 travellers from 20 markets (19 international markets, plus Australian out-of-region travellers) and actively assessed stakeholder knowledge, published documentation and online conversations to provide a foundation to build hypotheses that were then validated through quantitative survey processes.

The research was specifically designed to ensure that the insights gained from international markets are broader than ever before.

CULTURAL INSIGHTS December 2021

Harvesting and sizing global travel experience conversations (...many billions over a 5-year period) through 250,000 conversations across 130 key influencers and organisations using a semiotic engine powered by artificial intelligence.

What has been growing pre COVID-19, what's the discourse at the heart of COVID-19 and the interesting themes and territories for investigation.

INSIGHTS REWIND December 2021

Auditing and cataloging the knowledge base to ensure we build on what is known through STO interviews, a review of 67 documents (research, thought leadership, Tourism Australia and State and Territory Tourism Organisations).

The push and pull factors that create travel demand for Australia, our competition, core markets, traveller profiling plus beliefs and hypotheses for testing in relation to COVID-19, experiences, Indigenous and sustainability.

QUALITATIVE EXPLORATION February/March 2022

Unpacking and understanding travel experiences to help maximise traveller appeal through 240 High Yield Travellers across 10 key markets, focus groups and 6-day online community.

Exploring the travel intentions and needs of High Yield Travellers, the wants from travel experiences and the conversations around Indigenous, sustainability and Australia as a destination.

QUANTITATIVE VALIDATION April/May 2022

Quantify attractiveness and attainability of experiences and sectors with the greatest demand that Australia can own, and win, through 23,771 surveys across 20 markets.

Sizing the travel landscape, traveller needs and travel and experience demand; sector mapping and the alignment of traveller profiles.

Visual description:
Project Roadmap

For a more detailed explanation of the methodology, please refer to the Appendix.

TARGET AUDIENCES

The primary target audience for this research was a broad mix of willing leisure travellers:

- International travellers were defined as those that travelled long haul/ out-of-region for leisure (holiday/visiting friends and relatives) purposes in the last 3 years or are actively planning to take a holiday to an out-of-region destination within the next 2 years.

Most tourism data available within Australia is focused on historic visitation to Australia. This research intentionally focused on out-of-region travellers in general, not just those considering or intending to visit Australia. Our intent is to help Australia capture global market share and be as competitive on the world stage as possible, hence the broad definition of audience here.

Secondary target audiences included:

- High Yield Travellers (out-of-region travellers with above-average spend in their market).
- Luxury Travellers (actual or intended-spend above AU$1,000 equivalent per person per night).
- Long Stay Travellers (actual or intended trip length over 30 days).
- Working Holiday Makers (Under 36 years who have taken, or plan to take, a working holiday).

The geographic scope for this project was extensive:

- The Qualitative Exploration phase of the research was conducted across 9 of Tourism Australia's key international markets, as well as the Australian market.
- The Quantitative Validation phase was conducted across Tourism Australia's 15 key markets, 4 identified emerging markets, and the Australian market. The four emerging markets (Thailand, Philippines, Vietnam, and Taiwan) were chosen given their proximity to Australia and potential as leisure tourism markets in the future.

It is important to note that 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, Hong Kong (SAR), New Zealand and Italy.

To give an idea of the relative size of these markets, the chart below outlines historic expenditure for the leisure audience by market.

		TOTAL TRIP SPEND AUD '000
China		12,400,280
United States of America		3,934,797
United Kingdom		3,357,023
New Zealand		2,603,799
Japan		2,080,487
India		1,812,266
Singapore		1,528,813
South Korea		1,501,834
Hong Kong (SAR)	HK	1,391,297
Malaysia		1,284,691
Germany		1,176,250
Taiwan	TW	969,067
Canada		892,381
Indonesia		882,234
France		789,633
Vietnam		547,759
Philippines		531,652
Thailand		503,787
Italy		491,289

Visual description:
Total trip spend (AUD '000) by market, according to the Tourism Research Australia International Visitor Survey 2019.

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.

The specific market coverage for this research is outlined below.

MARKETS SURVEYED –	TRAVELLER ORIGIN
Australia	AUS
Canada	CAN
China	CHN
France	FRA
Germany	DEU
Hong Kong	HKG
India	IND
Indonesia	IDN
Italy	ITA
Japan	JPN
Malaysia	MYS
NZ	NZL
Philippines	PHL
S. Korea	KOR
Singapore	SGP
Taiwan	TWN
Thailand	THA
UK	GBR
USA	USA
Vietnam	VNM

Visual description:
Markets surveyed.

Image: Tourism Australia

THE EVOLUTION OF GLOBAL TOURISM AND TODAY'S TRAVELLER

SIGNIFICANT FACTORS SHAPING UNDERSTANDING OF TODAY'S TRAVELLER

There are three key areas to consider in the evolution of global tourism following the COVID-19 pandemic:

01

The impact of COVID-19 requirements on travel planning.

02

The impact of COVID-19 on hobbies and passions, which could drive travel or experience demand.

03

Lenses for looking at global travellers in assessing demand and identifying opportunities.

TRAVEL PLANNING

THE IMPACT OF COVID-19 REQUIREMENTS ON TRAVEL PLANNING

We can expect COVID-19 to continue impacting travel during the transition period from peak COVID-19 to a post COVID-19 world. Despite international travel resuming for most markets (for outbound and inbound travellers), we are yet to see how strongly and how quickly travel will rebound.

With the COVID-19 pandemic still fresh in travellers' minds, and COVID-19-related headwinds still influencing plans and choices, we could see a limited conversion to action during this transition phase.

A HESITANT TRAVELLER

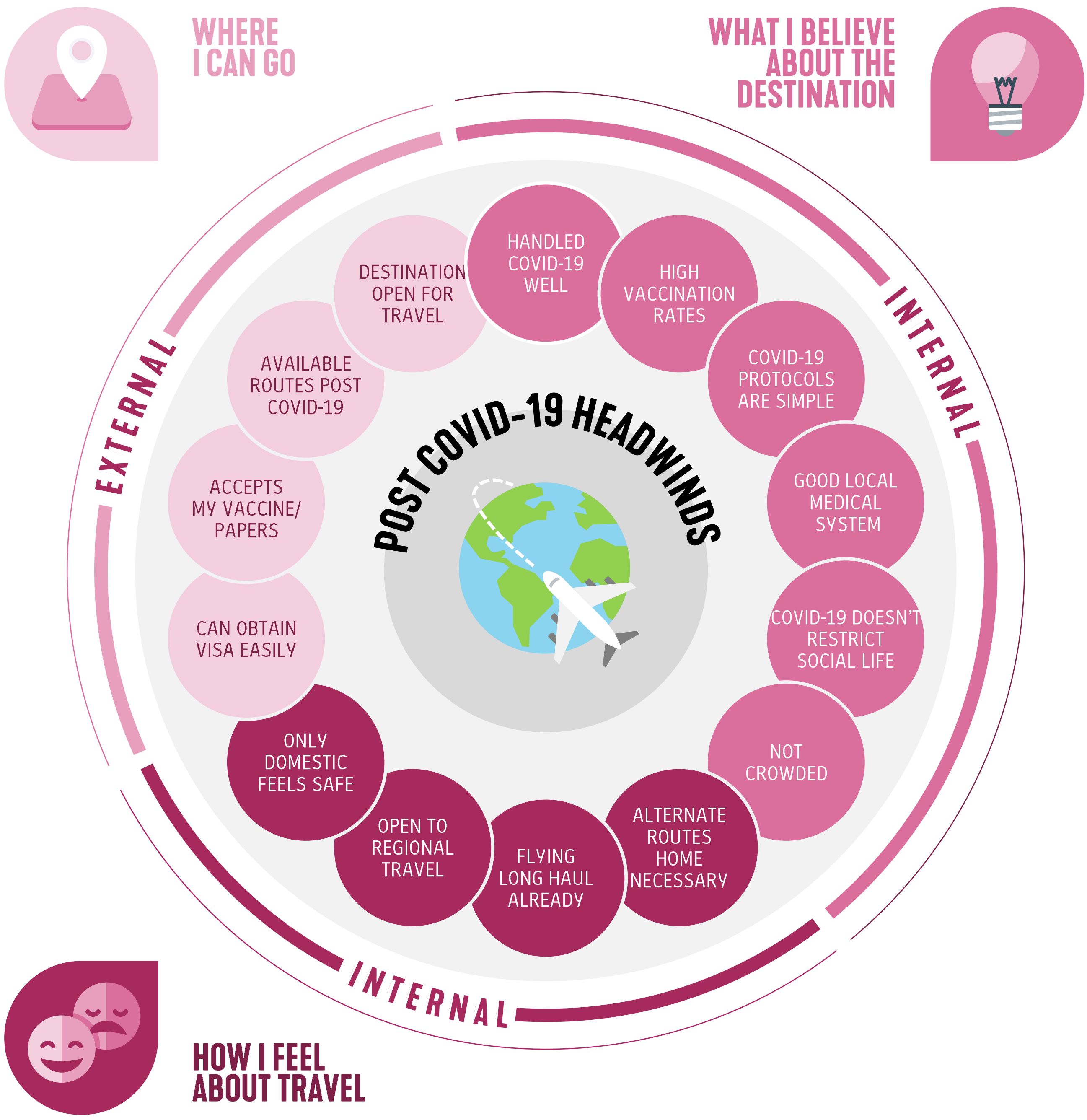
There is a strong appetite for the return of international and out-of-region travel, as we seek to move on from the restrictions, lockdowns and isolation placed on us during peak COVID-19. But as concerns regarding COVID-19 remain and with travel restrictions, rules around vaccinations and testing varying significantly around the world travellers are understandably hesitant about travel.

DISRUPTIONS ACROSS TRAVEL STAGES

The impact of the pandemic spans societal, technological, environmental, economic and political factors, which in turn influences every aspect of travel planning and experiences. We are yet to fully appreciate the evolution in global tourism as a result of the impact of COVID-19, or how much future travel will look just like past travel. Until then it is likely we will continue to experience disruptions across travel stages, with differences that unsettle consumers as they grapple with what they were familiar with (e.g. the cost of travel, availability of flights).

HEADWINDS
IMPACTING CHOICES

There are also internal and external headwinds impacting travel planning during this transition period.



Visual description:
Headwinds impacting travel planning, according to out-of-region travellers in the qualitative research.

WHERE CAN I GO?

Government restrictions (or lack thereof) have shaped consideration and choices for travel. This includes:

- Available routes post COVID-19, as not all routes have been re-instated or are operating at a reduced frequency (and higher price).
- Destinations open for travel, with some destinations only partially open in the transition period from peak COVID-19, i.e. based on citizenship or proof of vaccinations.
- Acceptance of vaccines/papers - vaccine approval has not been universal, i.e. there are some destinations that do not accept travellers with certain vaccines (if that vaccine was not approved in that market).
- Can obtain visa easily, which was an ongoing issue for some travellers pre COVID-19 and has only become more difficult in a post COVID-19 world (sometimes based on assumptions of a destination feeling harder to access).

HOW DO I FEEL ABOUT TRAVEL?

Many travellers continued to travel domestically throughout the pandemic. As a result, we see an openness to regional or domestic travel, with travellers knowing and experiencing many travel needs, such as reconnection, exploration, adventure, being met through domestic travel. For those wanting to stretch beyond the region, there is still a proximity bias for some travellers, as they balance the reward of meeting vacation needs against the risk of travel abroad during the COVID-19 transition. For now, domestic travel can feel safer. Or, facing the consequence of travel disruptions, including having to find alternative routes home if necessary (if some destinations shut borders or place new restrictions on entry). This is leading to a range of attitudes to global and out-of-region travel, which look set to last 1-2 years. But, as we see a return to long-haul travel, this could shift faster with a normalisation of global travel.

WHAT DO I BELIEVE ABOUT THE DESTINATION?

To smooth the potential or still disrupted travel experience, travellers are looking to destinations with:

- High vaccination rates as a sign of less risk of transmission if COVID-19 is still present in the destination.
- Good local medical system or amenities to feel more secure about what would happen should the traveller contract COVID-19 during their travels.
- Simple COVID-19 protocols, to make it easy to understand what is required during their time in the destination and to avoid any fines or issues during their vacation.
- Proof that the destination handled COVID-19 well, to reassure the traveller of the confidence and expertise that the destination has in handling COVID-19, should it become a serious health issue during their vacation. These beliefs are often based on assumptions or the media coverage travellers have been exposed to during the pandemic. There has also been increased awareness about basic hygiene by market (pushing demand to developed destinations in the short-term). To guarantee enjoyment, many are looking for destinations where COVID-19 doesn't restrict the travel experience, or for destinations and experiences that won't involve crowds, to reduce risk of transmission.

Most of these headwinds may fall away in the coming 1-2 years (in a 'post COVID-19' world) but will continue to influence High Yield Traveller plans and choices during the transition period.

THE IMPACT OF COVID-19 ON PASSIONS AND DESTINATION AND EXPERIENCE CHOICE

For some, COVID-19 gave them more time for existing passions, especially a shift to home or locally based activities. For these consumers, there is less evidence of the pandemic sparking new hobbies, passions or interests that would influence travel as destination drivers or would transform the experience sector post COVID-19.

However, 13 per cent of travellers specifically travel to engage in their hobbies, passions and interests. Certain experiences over-index with these travellers, and any gains in these areas could shape travel demand (e.g. travelling for golf, diving) or increase the prominence of known important attributes (e.g. food and beverage). In addition, there are some hobbies and passions, which could not be pursued through COVID-19 that will see a strong rebound in a post COVID-19 world (e.g. sporting events, music festivals).

Those less passionate hobbyists tend to travel with their hobbies, passions and interests as contributing to itinerary builders, to be sampled as they travel, but without informing destination choice. And those that shifted to hobbies, passions and interests to fill time or replace 'real-life' options (e.g. cooking when unable to visit restaurants) are also less likely to have their hobby, passion or interest drive destination choice.

Image: Tourism Australia

BIGGER, BROADER INTEREST ACTIVITIES THAT INFLUENCE TRAVEL

MORE NICHE PASSION POINTS THAT INFLUENCE TRAVEL

Visual description:
Broad interest activities vs. niche passion points that influence travel.

A NEW LENS FOR UNDERSTANDING EVOLVING VISITOR NEEDS


Image: Tourism Australia

As a top-of-funnel marketing organisation, Tourism Australia intentionally focuses our efforts on understanding, tracking and marketing to traveller demand segments based on identifiable attributes of who and how they travel, including actual or intended purpose of travel, length of stay and trip spend. The four key segments within our core remit are:

HIGH YIELD TRAVELLERS:

Out-of-region leisure travellers with an above-average spend based on yield thresholds per market.

LUXURY/PREMIUM TRAVELLERS:

Leisure travellers spending more than AU$1,000 per person per night.

WORKING HOLIDAY MAKERS:

Aged under 36 years and travelling on or considering a working holiday visa.

BUSINESS EVENTS:

Attendees of a business event (conference or convention) or travelling as an incentive reward provided by business employer.

This research covers the first three of these segments, while the Business Events audience is out of scope of this report but covered by other dedicated Tourism Australia research. For this research we have also widened our focus to explore a broader Long Stay Traveller beyond our core Working Holiday Maker segment. This broader long-stay opportunity acknowledges shifting dynamics in the travel environment post-pandemic, including the higher travel readiness of the visiting friends and relatives market, and the growing ability and appetite for travellers to 'work from anywhere' resulting in longer stays.

Given the focus on experiences, this research applied an additional layer of understanding and classifying travellers. The new lens allows travellers to be categorised based upon their 'needs' that affect key travel decisions such as destination, style of travel and activities or experiences engaged in. This research introduces seven traveller typologies which are referenced throughout the available resources to help unlock the WHY behind travel choices and deliver clearer, richer strategies and opportunities.

Tourism Australia's marketing focus will remain squarely on our primary traveller demand segments. However, overlaying the travel typologies affords a greater degree of granularity and tailoring of marketing communications and marketing for specific audiences. The data outlined later in this report gives operators the ability to be more targeted and nuanced with their product development for these audiences or the ways in which they articulate the value proposition.

Visual description:
Traveller Typologies, created from a classification of travel needs.

TRAVELLER TYPOLOGIES

The three largest traveller typologies, each representing 1 in 6 global travellers, are the Reconnection, Into Nature and Exploration travellers:

RECONNECTION TRAVELLER:

The Reconnection traveller is characterised by people motivated to travel so they can spend quality time with friends and family. This includes but goes beyond visiting friends and relatives – the initial driving force for tourism recovery as borders reopened – and encompasses those travelling with loved ones. They want to relax and escape their everyday lives, have fun, and enjoy themselves. Markets with a high incidence of these types of travellers compared to Global, in order from highest incidence, are New Zealand, Taiwan, UK, Hong Kong, Australia, Canada, Singapore, USA and the Philippines.

Image: Tourism Australia

INTO NATURE TRAVELLER:

The Into Nature traveller is overwhelmingly characterised by people motivated to travel to get in touch with nature. They want to escape, to feel secure and comfortable, have a sense of adventure and a focus on mental and/or physical wellbeing. Markets with a high incidence of these types of travellers compared with Global, in order from highest incidence, are Thailand, India, China, Taiwan, Vietnam and Indonesia.

Image: Airborne Solutions Australia

EXPLORATION TRAVELLER:

The Exploration traveller is motivated to explore new destinations and to learn and experience new things about the world. There's also a strong motivation to immerse themselves in a different culture or way of life. Markets with a high incidence of these types of travellers compared with Global, in order from highest incidence, are Italy, Germany, France, Canada, Singapore, Australia, USA, Vietnam, Philippines and the UK.

Representing 1 in 7 global travellers are the Adventure, the Transformation, the Passion/Hobbies, and the Restoration travellers:

ADVENTURE TRAVELLER:

The Adventure traveller is motivated to travel for fun, enjoyment, and a strong sense of adventure. They're keen to meet new people, make friends and challenge themselves. Markets with a high incidence of these types of travellers compared with Global, in order from highest incidence, are India, USA, Philippines, UK, Canada, Australia, New Zealand, Malaysia and Thailand.

Image: Tourism Australia

TRANSFORMATION TRAVELLER:

The Transformation traveller is highly motivated by their focus on mental and/or physical wellbeing and their interest in transformative experiences, self-discovery, and growth. They over-index on immersing themselves in a different culture or way of life and indulging and pampering themselves. Markets with a high incidence of these types of travellers compared with Global, in order from highest incidence, are China, South Korea, Thailand, Vietnam and Japan.

PASSION/HOBBIES TRAVELLER:

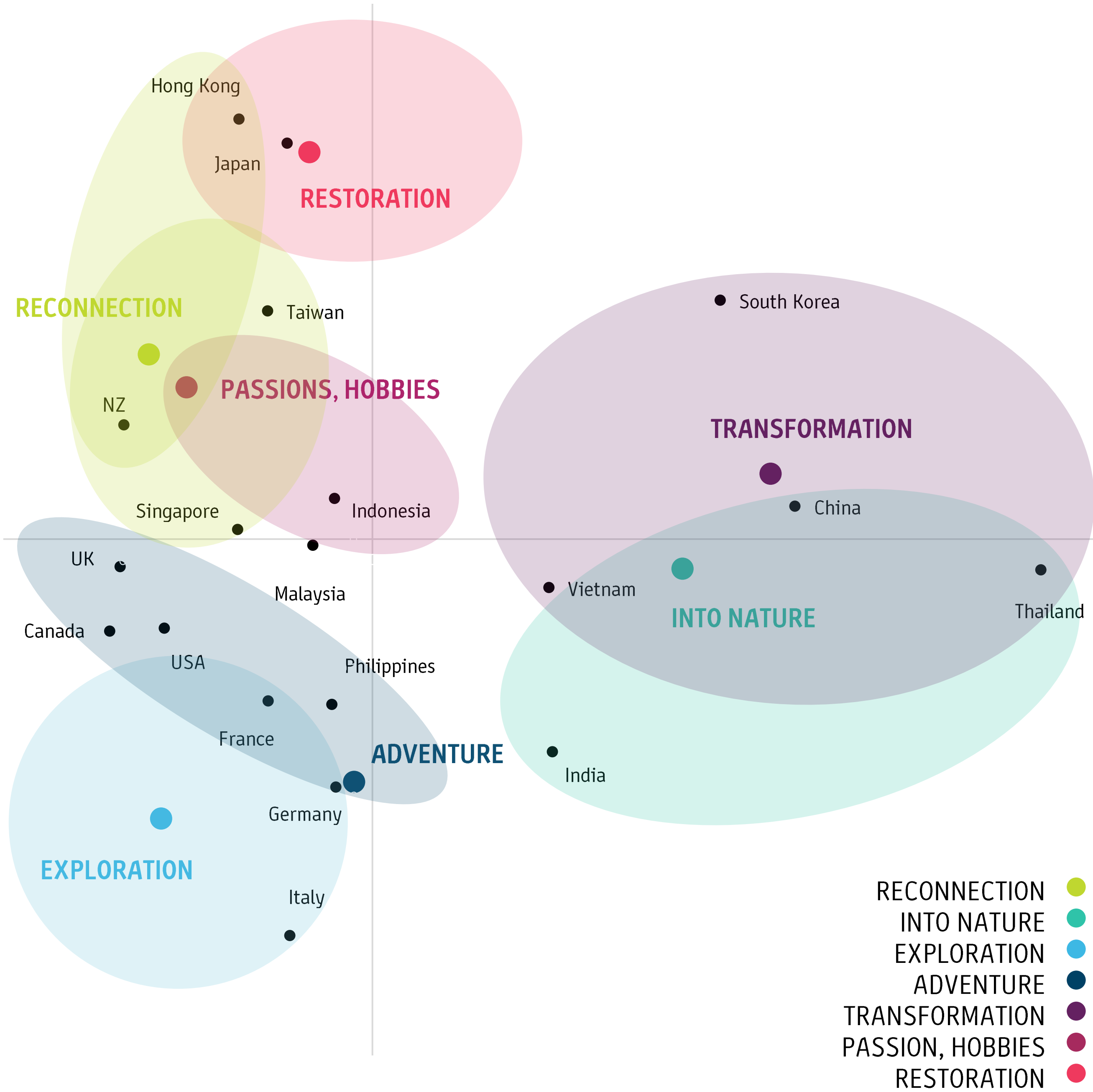
The Passion/Hobbies traveller is motivated by an almost single-minded focus on an activity, hobby, or passion. Though there is also interest in indulging and pampering themselves and discovering off-the-beaten-track places. Markets with a high incidence of these types of travellers compared with Global, in order from highest incidence, are Indonesia, Japan, Hong Kong, Malaysia, Germany, the USA and New Zealand.

Image: Tourism Australia

RESTORATION TRAVELLER:

The Restoration traveller. This is the smallest typology, comprising 7 per cent of global travellers. These travellers have a high need to feel secure and comfortable and to have fun and enjoy themselves. They have a strong desire to indulge and pamper themselves. Markets with a high incidence of these types of travellers compared with Global, in order from highest incidence, are Japan, Hong Kong, South Korea, Vietnam, France and Taiwan.

TRAVELLER TYPOLOGIES X MARKET: CORRESPONDENCE MAP

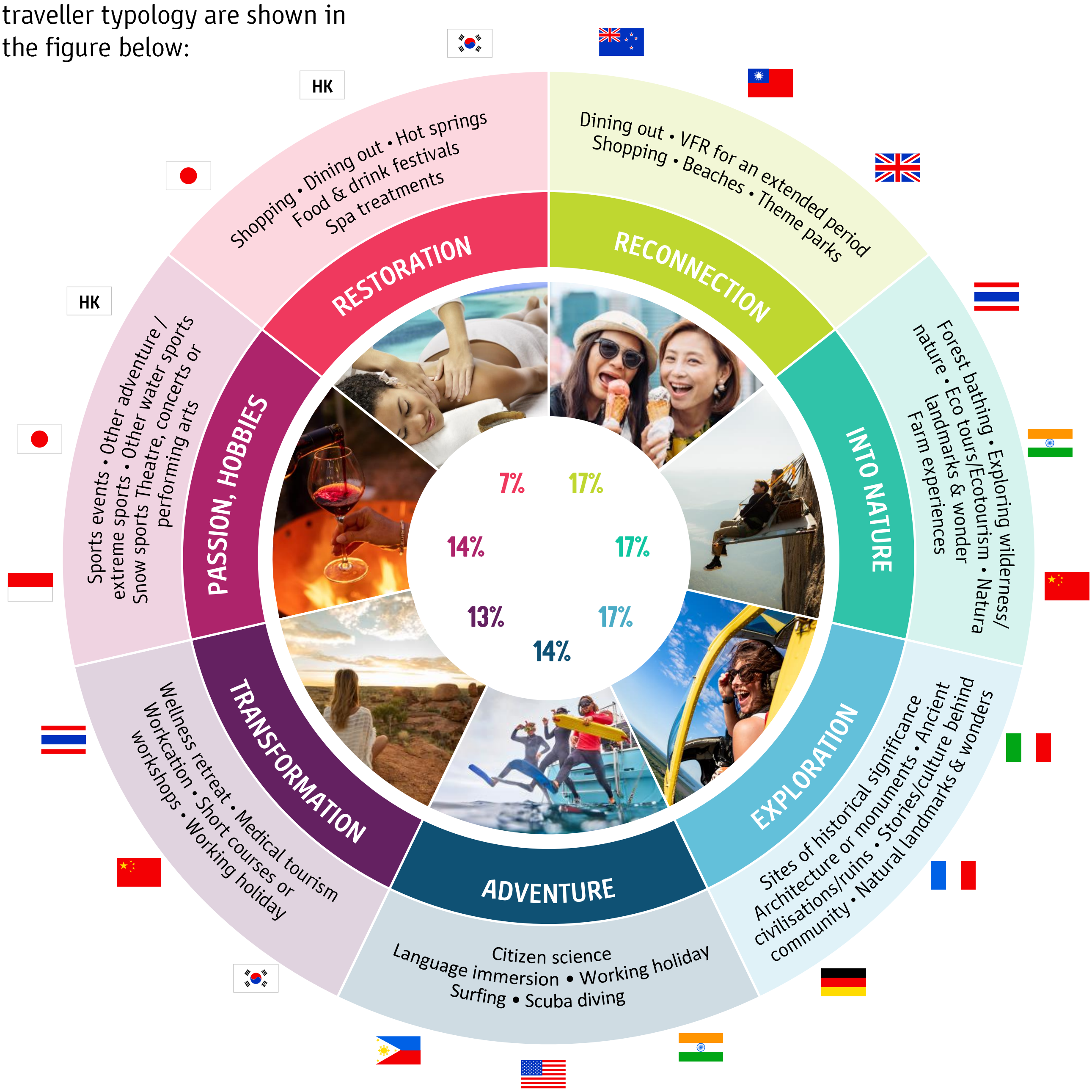


Visual description:
A correspondence map of Traveller Typologies by market. This shows the relative relationships between and within two groups: traveller typology and market. Markets that cluster together are similar in their traveller typologies; traveller typologies that cluster together are similar in their travel needs. Traveller typologies and markets that cluster together indicate markets that are strongly associated with that traveller typology (and vice versa). Markets and Traveller typologies that are further away from the centre of the axes are markets or traveller typologies more differentiated than markets and traveller typologies that are closer to the centre of the axes.

TRAVELLER TYPOLOGIES: THE TOP 5 EXPERIENCES AND TOP 3 MARKETS

Once industry has identified the traveller typology it is targeting, the experience offered, and target market can be customised appropriately.

The top 5 experiences and top 3 markets for each traveller typology are shown in the figure below:



Visual description:
Market skews and experiences sought after by Traveller Typologies
- based on total out-of-region travellers.
- based on % travellers aligning to this typology.
- based on % 'interested in doing this' percentage points about the expected value.

Image: Destination NSW

WHAT TRAVELLERS WANT

WHAT GLOBAL TRAVELLERS WANT FROM TODAY'S TRAVEL EXPERIENCE

Traveller needs are constantly evolving, and our understanding of today's global travellers needs are continuing to develop following the significant shifts as a result of the pandemic. What experiences are they seeking? What experiences are most relevant to particular markets and different traveller segments? What does this experience actually do for them and why are they seeking it?

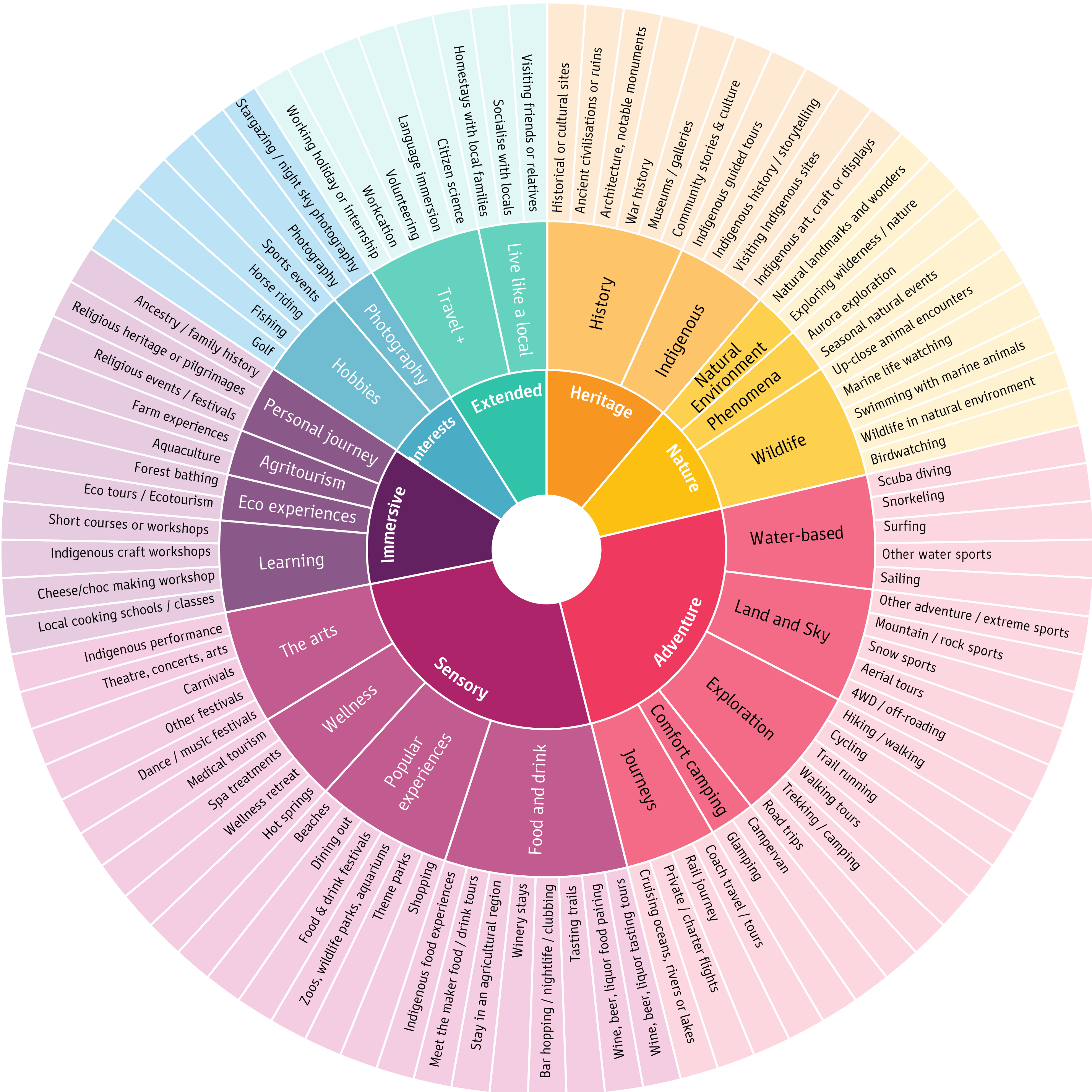
CLASSIFYING EXPERIENCES FROM A TRAVELLER PERSPECTIVE

To say that the tourism industry has a 'long tail' belittles the breadth, depth, and quality of the wonderful experiences travellers enjoy while they are in Australia. Tourism is a constellation industry with over 300,000 experiences which together represent the reason that Australia is such a competitive and rewarding destination. Historically, the industry has been categorised according to the operator's understanding of demand, and this research started from the same understanding. However, this analysis is intentionally consumer-led, outlining how the world's travellers categorise experiences and the suite of experiences they are most interested in.

The research process looked at 89 universal experiences to understand them better and to connect experiences which hold similar appeal for travellers. These 89 experiences were put through a series of analysis processes [4] to identify when they were viewed similarly or associated together by travellers from a demand perspective. This identified distinct 'clusters' of experiences, which were then labelled to describe the nature of the experiences being sought. This analysis reveals the underlying appeal of broad categories of experience, while also allowing us to drill down into these at a more granular level to identify concrete examples of activities that deliver upon these experiences.

[4] Hierarchical cluster analysis and factor analysis to identify grouping of experiences that were viewed similarly in terms of appeal in responses made by individual travellers.

Travellers seeking immersion into nature or nature-based experiences find this appealing due to the connections they are seeking to both animals and nature and recognise the unique and memorable experiences that can be obtained in a different natural environment. While they may be headlining their visit around a particular natural landmark, they are likely to also be seeking supplementary experiences such as visits to wildlife parks/refuges, ability to get up close to unique landscapes or wildlife and want freedom to explore the abundance of natural environments and beauty. This approach identifies 7 primary experience clusters and 22 sub-clusters of global experiences and is visually displayed as an Experience Sector Wheel.



Visual description:
Experience clusters and sub-clusters, created by grouping experiences into clusters based on similarity to each other in terms of appeal, using hierarchical cluster analysis and factor analysis.

OUT-OF-REGION TRAVELLER MARKET SIZING

Out-of-region market sizing was undertaken to provide greater evidence as to the size of prize for various experiences in industry terms i.e. traveller numbers. While much of the analysis into traveller behaviours and needs was based on percentages of Global markets (excluding Australia), the sizing analysis considers the market out-of-region traveller population and so is weighted more towards those markets with a higher volume of international travel.

Sizing analysis used pre COVID-19 trip volumes projected forward using survey responses from out-of-region travellers and adjusted to account for the impact of COVID-19. This allowed us to align out-of-region travel populations (numbers of people) to known out-of-region trip volumes (numbers of trips) with reasonable adjustment to represent a COVID-19-free potential. Sources used for this analysis included 2019 out-of-region trip volumes from Oxford Economics, visitor trip data of 18 to 64-year-old visitors from the Australian Bureau of Statistics, COVID-19 impact data from Oxford Economics out-of-region trip volumes 2017-2021 (an implied ratio of annual travel population to five-year travel population) and this research.

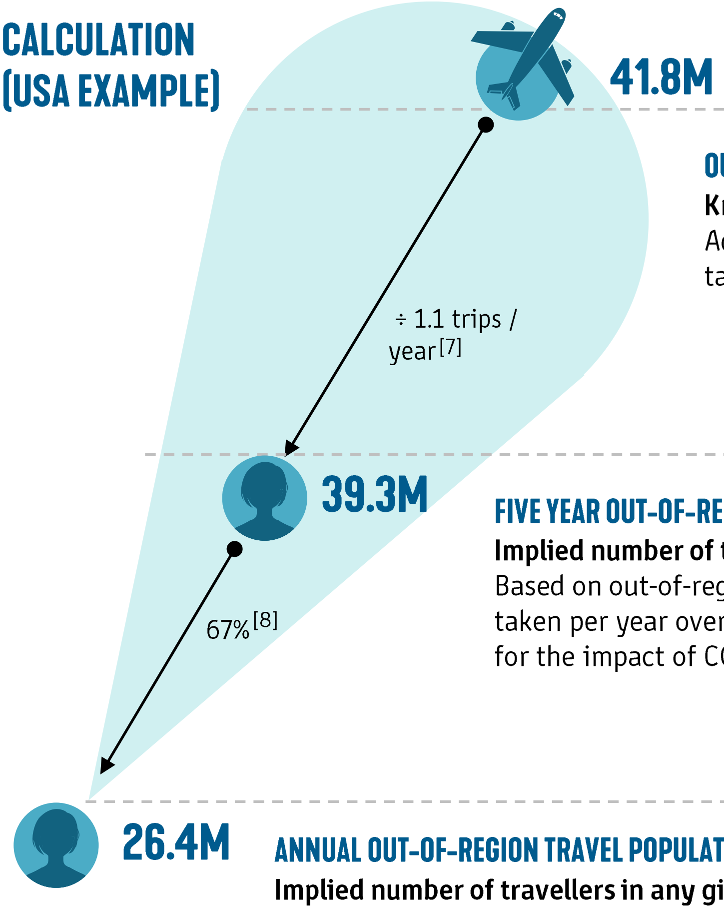
Image: Tourism Australia

MARKET SIZING APPROACH:

Reported market sizing figures are based on survey responses from out-of-region travellers for which each market is weighted up to equal the estimated number of people who travel out-of-region in a given year.

These annual out-of-region travel populations are designed to align to known out-of-region trip volumes and are adjusted to represent 'COVID-free' potential.

CALCULATION (USA EXAMPLE)



OUT-OF-REGION TRIPS PER YEAR

Known pre COVID-19 out-of-region trip volume[5]
Adjusted down from total trips (60.3M) to those taken by 18-64 year olds.[6]

FIVE YEAR OUT-OF-REGION TRAVEL POPULATION

Implied number of travellers in a five year period
Based on out-of-region trip volume and claimed number of trips taken per year over the past five years. Adjusted up to account for the impact of COVID-19 in 2020/2021.

ANNUAL OUT-OF-REGION TRAVEL POPULATION

Implied number of travellers in any given year.
Based on claimed number of trips taken in the past five years.
Adjusted up to account for the impact of COVID-19 in 2020/2021.

Visual description:
Explanation of the approach and calculation used in out-of-region traveller market sizing.

Note: Although this sizing approach has been designed to minimise COVID-19 impacts, the sizing estimates are nonetheless likely to represent slight underestimates due to residual COVID-19 influence. The calculated estimates are also intentionally conservative to err on the side of caution during this high-risk recovery period.

[5] 2019 out-of-region trip volumes sourced from Oxford Economics.
[6] 18-64yrs trip proportion sourced from Australian arrivals figures.
[7] Future of Global Tourism Demand Research 2022, S4 claimed out-of-region trips in the past five years, adjusted to account for 2 years of COVID-19 impact, adjustment based on observed drop-off in trip volumes from Oxford Economic out-of-region trip volumes 2017-2021.
[8] Implied ratio of Annual Travel Population to Five Year Travel Population. Based on responses to Future of Global Tourism Demand Research 2022, S4 claimed out-of-region trips in the past five years and adjusted to account for 2 years of COVID-19 impact, adjustment based on observed drop-off in trip volumes from Oxford Economic out-of-region trip volumes 2017-2021.

Calculated in this way, the estimated target population is defined as the estimated number of travellers (aged 18-64) from 19 international markets to any out-of-region destination, in any given (non COVID-19) year. Our market sizing estimates this as a population of 124.8 million travellers, broken down across the 19 markets as follows (note that these population sizes are for the total number of out-of-region travellers in that market):

ANNUAL OUT-OF-REGION TRAVELLER POPULATION

China	28.7M
United States	26.4M
South Korea	9.8M
United Kingdom	9.7M
Japan	7.9M
France	7.4M
Canada	6.2M
Germany	5.6M
India	3.7M
Italy	3.1M
Philippines	2.8M
Taiwan	2.7M
Vietnam	2.1M
Thailand	2.1M
Malaysia	1.7M
Singapore	1.5M
Indonesia	1.4M
Hong Kong	1.2M
New Zealand	0.7M
GLOBAL (EXCL. AU)	**125M**
Australia	8.8M

Visual description: Population estimates from out-of-region traveller market sizing.


Image: Brisbane Marketing

The total market for any given experience or cluster is the estimated subset of this population who are interested in a particular experience or cluster of experiences. While this represents the opportunity pool for the Global audience, overlaying destination consideration or Australia's current market share helps us understand the potential for Australia.


RIVERLIFE

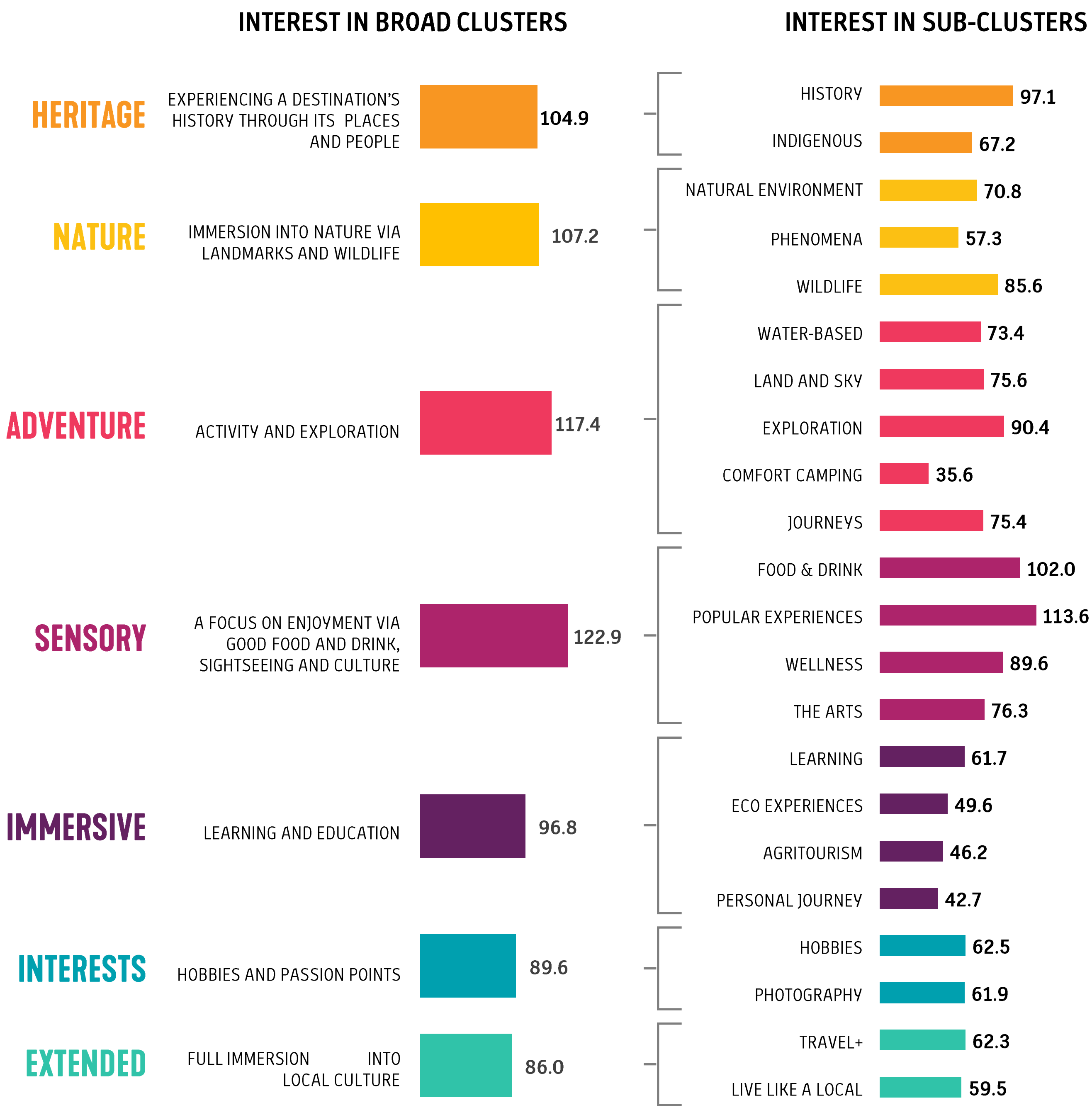
SEVEN KEY EXPERIENCE CLUSTERS

Seven key experience clusters exist. The greatest demand from Global travellers is for 'Sensory' experiences and 'Adventure' experiences followed by interest in 'Nature' and 'Heritage' based experiences.

Of a total predicted out-of-region traveller population of 124.8 million across 19 international markets, almost all have an interest in Sensory, Adventure, Nature, and Heritage experiences. These experience clusters should provide the foundations for any destination's experience offer.

GLOBAL TRAVELLERS INTERESTED IN EXPERIENCES

(EXCLUDES AUSTRALIANS) (millions)*



Visual description:
Traveller population sizing, based on interest in experiences
*Total global (excl. Australia) Annual out-of-region traveller population calculated as: 124,761,731.

Although the experience clusters of Immersive, Interests and Extended have lower overall appeal among out-of-region travellers, they still represent significant potential, each equating to more than 80 million potential out-of-region travellers interested per year.

HERITAGE

The Heritage experience cluster is best described as 'Experiencing a destination's history through its places and people'. Heritage incorporates broader historical sites, buildings and culture, as well as Indigenous specific experiences. Heritage experiences are appealing because they provide travellers the opportunity to immerse themselves in a different culture; to have unique, once-in-a-lifetime encounters. Indigenous tourism experiences are also included in this cluster.

EXPERIENCING A DESTINATION'S HISTORY THROUGH ITS PLACES AND PEOPLE

> 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: **UK**

> 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: **STH KOREA**

TRAVELLER INTEREST (GLOBAL excl. AU) AND HIGHEST APPEAL (RANK)

HISTORY

	Traveller interest	Highest appeal (rank)	
Historical or cultural sites	46%	#3	ITA
Architecture, notable monuments	43%	#6	MYS
Museums / galleries	41%	#5	ITA
Ancient civilisations or ruins	39%	#6	ITA
Community stories and culture	29%	#18	FRA
War history	24%	#29	GBR

INDIGENOUS

	Traveller interest	Highest appeal (rank)	
Visiting Indigenous sites	30%	#11	DEU
Indigenous art, craft or displays	29%	#14	IDN
Indigenous guided tours	27%	#19	THA
Indigenous history / storytelling	21%	#33	THA

AUSTRALIAN TOURISM **CASE STUDIES** THAT DELIVER THIS EXPERIENCE

Image: Tourism Australia

DREAMTIME SOUTHERN X TOURS – NSW

Exploring Aboriginal Culture in the Heart of Sydney

The Rocks Aboriginal Dreaming Tour takes you on a leisurely stroll around the famous Rocks precinct, while your Aboriginal guide shares passed-down knowledge about the cultural significance of Sydney Harbour, its foreshores and adjoining waterways, explaining the connection between the natural world and the spiritual world, even in a modern-day metropolis.

You needn't leave city limits though, to learn about the deep spiritual connection between Aboriginal culture and the earth. In Sydney's cosmopolitan centre, Dreamtime Southern X leads guided walking tours that showcase the city's ancient heritage, with 29 clan groups belonging to the metropolitan area, referred to collectively as the Eora Nation.

TRAVELLERS DRIVING HIGHER DEMAND FOR THIS EXPERIENCE

Sites of historical or cultural significance are of particular interest to travellers from Italy and Germany, along with older singles/couples with no kids and those travellers looking for Exploration.

Architecture appeals to travellers looking for Exploration experiences along with travellers from Malaysia, South Korea, and France, while Italian travellers show strong interest in ancient civilisations/ruins and museums/galleries.

German travellers show strong demand in visiting Indigenous sites or communities, while the Indonesian market has high interest in Indigenous arts, crafts and cultural displays.

Image: Tourism Australia

NATURE

The Nature experience cluster involves 'Immersion into nature via landmarks and wildlife'. Wildlife encounters, seasonal natural events and natural wonders are all appealing aspects of this experience cluster. These experiences provide the opportunity to reconnect with nature, to escape their everyday lives and to create fun, rare and sharable encounters.

IMMERSION INTO NATURE VIA LANDMARKS AND WILDLIFE

"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**

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: **USA**

TRAVELLER INTEREST (GLOBAL excl. AU) AND HIGHEST APPEAL (RANK)

	Traveller interest	Highest appeal (rank)	
NATURAL ENVIRONMENT			
Natural landmarks and wonders	48%	#2	ITA
Exploring wilderness / nature	41%	#6	DEU
PHENOMENA			
Aurora exploration	35%	#4	ITA
Seasonal natural events	31%	#20	MYS
WILDLIFE			
Wildlife in their natural environment	41%	#6	GRB
Marine life watching	36%	#8	DEU
Up-close animal encounters	30%	#17	FRA
Swimming with marine animals	29%	#16	FRA
Birdwatching	16%	#38	IND

AUSTRALIAN TOURISM **CASE STUDIES** THAT DELIVER THIS EXPERIENCE

CASE STUDY

Image: Tourism Australia

LIVE NINGALOO – WA

Specialists in Small, Single Swimming Group, Boat Tours of the Famous Ningaloo Reef

Their mission is to reclaim time in a meaningful way and give people the space to feel something. They achieve this with their wildlife tours. It's memorable because you'll be outside your comfort zone and the hope is to spark your mind about conservation. They are the first and only company on the Ningaloo Reef to take the small tour approach to increase the amount of time with the wildlife. This approach highlights their passion for sharing the Ningaloo life. The Ningaloo Reef is a biodiversity hotspot, rich in aquatic life.


Image: Tourism Australia

TRAVELLERS DRIVING HIGHER DEMAND FOR THIS EXPERIENCE

Viewing natural landmarks and wonders are the key experiences within the Nature cluster, particularly appealing to High Yield Travellers, older singles/couples with no kids, travellers looking for Into Nature and Exploration experiences along with those travellers from Italy, France, Singapore, and the UK.

Exploring wilderness ranks in the top 10 for High Yield Travellers, those looking for Nature experiences and travellers from Germany and France in particular. Waterfalls are the most appealing form of wilderness for travellers to explore, followed by National and State Parks, rivers or lakes and marine areas.

Aurora Exploration is of interest to just over a third of travellers overall, but is particularly appealing to travellers from Italy, Japan, and Hong Kong where it ranks in their top 10.

ADVENTURE

The Adventure experience cluster is all about ‘Activity and exploration’. It incorporates a range of water and land and sky activities, exploration, camping as well as various transport (air, bus, rail, boat) oriented journeys. These experiences range from slower-paced activities such walking tours all the way through to extreme sports.

ACTIVITY AND EXPLORATION

> 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: **USA**

> I enjoy the process of camping including setting up the tent, making a campfire and cooking outdoors for myself.
>
> HIGH YIELD TRAVELLER: **USA**

TRAVELLER INTEREST (GLOBAL excl. AU) AND HIGHEST APPEAL (RANK)

	Traveller interest	Highest appeal (rank)	
WATER-BASED			
Snorkelling	27%	#24	KOR
Other water sports	25%	#32	NZL
Scuba diving	23%	#24	JPN
Surfing	19%	#29	CHN
Sailing	18%	#46	THA
LAND AND SKY			
Aerial tours	33%	#9	MYS
Snow sports	26%	#17	IND
Other adventure / extreme sports	22%	#35	PHL
Mountain / rock sports	21%	#29	IND
4WD / off-roading	18%	#36	FRA
EXPLORATION			
Walking tours	39%	#2	FRA
Road trips	35%	#5	AUS
Hiking / walking	33%	#3	DEU
Cycling	25%	#17	DEU
Trekking / camping	24%	#32	FRA
Trail running	12%	#75	HKG
COMFORT CAMPING			
Campervan	20%	#37	HKG
Glamping	20%	#34	NZL
JOURNEYS			
Cruising oceans, rivers or lakes	36%	#14	CAN
Rail journey	32%	#7	MYS
Coach travel / tours	25%	#18	IDN
Private / charter flights	14%	#66	ITA

AUSTRALIAN TOURISM CASE STUDIES THAT DELIVER THIS EXPERIENCE

Image: Tourism Australia

CAIRNS ADVENTURE GROUP, QLD

The Australian Spirit of Adventure. Cairns Adventure Group. Adventures For Everyone.

Cairns Adventure Group embodies the Australian spirit of adventure with a range of unique companies showcasing the very best of North Queensland. Whether that's travelling in the oldest rainforest in the world, swimming in waterfalls on the Atherton Tablelands, drifting through Behana Gorge or even white-water rafting the Barron River, Cairns Adventure Group offers visitors diverse experiences in some of the most pristine and protected natural landscapes on the planet.

TRAVELLERS DRIVING HIGHER DEMAND FOR THIS EXPERIENCE

Walking tours are a popular Adventure experience, particularly so for younger singles/couples with no kids and travellers looking for Adventure and Into Nature experiences. Markets which ranked Walking tours in their top 10 experiences include France (where it ranked 2nd), Thailand and Canada. Travellers from France also ranked Hiking/Walking as an experience of high interest.

Road trips ranked 22nd out of 89 experiences measured globally (equating to just over a third of travellers), but Australian travellers ranked the experience 5th and it was also a popular experience for travellers from Canada, India, New Zealand and the US. However, the idea of hitting the road was generally quite divisive across markets surveyed, ranking in the bottom quartile for travellers from Vietnam, Hong Kong, and China.

SENSORY

The Sensory experience cluster is focused on 'Enjoyment via good food and drink, popular experiences, wellness, and culture'. Dining at local restaurants, street food and tasting tours provide opportunities to immerse in local culture and engage with local people.

Among sensory experiences, the culinary experiences in most demand across both the food and drink cluster and adjacent popular experiences cluster include food and drink festivals, Indigenous food experiences, tasting trails, meet the maker tours, street food, and unique cuisines or local specialties – all of which are underpinned by a connection to place or local culture.

Demand for wellness related experiences has been trending upwards for some time but was boosted even further by the pandemic. There are many facets of wellness, from retreats to spa treatments, but one that stands out in popularity is hot springs. Universally popular but particularly so in several Asian markets, hot springs are by nature limited in their availability. Australia's offering has been boosted via recent investment into new developments, well-positioned to capitalise on this strong demand opportunity.

A FOCUS ON ENJOYMENT VIA GOOD FOOD AND DRINK, SIGHTSEEING AND CULTURE

"Learning about a location's food and drink helps to really understand the culture, learn about the people and the location you are visiting. It will be best done with knowledgeable locals as the guide."

HIGH YIELD TRAVELLER: **USA**

"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: **USA**

TRAVELLER INTEREST (GLOBAL excl. AU) AND HIGHEST APPEAL (RANK)

THE ARTS

Experience	Interest	Rank	Market
Carnivals	31%	#19	IDN/ HKG
Dance / music festivals	29%	#16	IND
Theatre, concerts, arts	26%	#24	CAN
Indigenous performances	23%	#35	CHN
Other festivals	14%	#69	AUS

WELLNESS

Experience	Interest	Rank	Market
Hot springs	51%	#2	CHN / HKG / TWN
Spa treatments	36%	#9	JPN
Wellness retreat	28%	#17	KOR
Medical tourism	13%	#16	THA

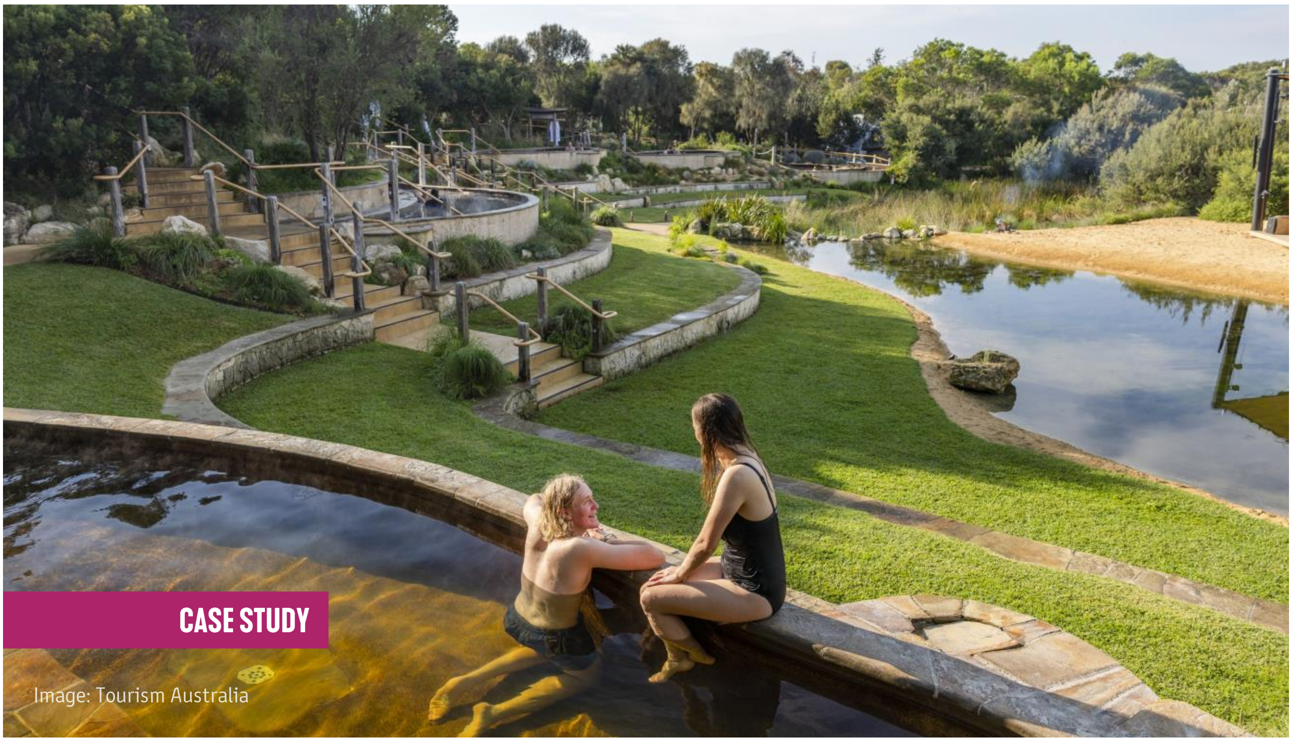
POPULAR EXPERIENCES

Experience	Interest	Rank	Market
Dining out	63%	#1	13 destinations
Beaches	57%	#1	CHN / ITA / GBR / FRA
Shopping	56%	#2	JPN / MYS / SGP / THA
Food & drink festivals	52%	#2	VNM
Theme parks	48%	#2	PHL
Zoos, wildlife parks, aquariums	41%	#8	AUS / HKG / IND

FOOD AND DRINK

Experience	Interest	Rank	Market
Indigenous food experiences	40%	#3	VNM
Tasting trails	37%	#1	KOR / VNM
Meet the maker food / drink tours	32%	#15	HKG
Wine, beer, liquor tasting tours	30%	#17	USA
Wine, beer, liquor food pairings	29%	#8	CHN
Stay in renowned agricultural region	26%	#17	MYS
Winery stays	23%	#28	AUS
Bar hopping / nightlife / clubbing	22%	#42	DEU

AUSTRALIAN TOURISM CASE STUDIES THAT DELIVER THIS EXPERIENCE



CASE STUDY

Image: Tourism Australia

PENINSULA HOT SPRINGS – VIC

Journey to Relaxation: A coastal oasis of health and wellbeing on the Mornington peninsula

Peninsula Hot Springs is a natural geothermal mineral springs and day spa facility located less than 90 minutes from Melbourne. With natural geothermal mineral waters that flow from 637 metres below ground into their pools and private baths. Awaken your senses, relax and reconnect as you explore natural surrounds. As a premier wellness destination they have over 70 globally inspired bathing and wellness experiences to explore.

Image: Tourism Australia

TRAVELLERS DRIVING HIGHER DEMAND FOR THIS EXPERIENCE

Dining out was ranked as the number one experience for the vast majority of travellers and markets surveyed. It was least popular in Italy but still ranked in the top 10. Shopping and hot springs are also highly sought-after experiences across all traveller types and markets.

Travellers from China, France, Germany, and Italy rated beaches as their number one experience – again something that most traveller types and markets are looking for (the exception being Taiwan where beaches ranked 16th).

Holding more specific appeal in some markets was Tasting Trails. This experience is extremely popular for travellers from Vietnam and South Korea whose travellers both ranked it 1st. It is also popular (in the top 10 of preferred experiences) for travellers from Taiwan, China, and Thailand. The popularity of this experience could be leveraged to promote greater dispersal across regional Australia.

IMMERSIVE

The Immersive experience cluster goes a step further than Sensory experiences. This is characterised by 'Learning, education, and personal development'. Examples include on-farm experiences and farm stays, learning new skills such as cooking, wine or cheese making, or eco-experiences such as forest bathing.

LEARNING AND EDUCATION

> 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.
>
> HIGH YIELD TRAVELLER: **NZ**

> My husband and kids, we all love picking our own berries and do this multiple times a year. Recently we travelled to the Blenheim area (approx. 5-hour drive) to pick strawberries at a hydroponic farm.
>
> HIGH YIELD TRAVELLER: **NZ**

TRAVELLER INTEREST (GLOBAL excl. AU) AND HIGHEST APPEAL (RANK)

	Interest	Rank	Market
PERSONAL JOURNEY			
Religious heritage or pilgrimages	21%	#28	IND
Ancestry / family history	17%	#42	USA
Religious events / festivals	16%	#39	IND
AGRITOURISM			
Farm experiences	33%	#7	SGP
Aquaculture	20%	#40	HKG
ECO EXPERIENCE			
Forest bathing	30%	#3	IDN
Eco tours / Ecotourism	27%	#10	VNM
LEARNING			
Cheese / chocolate making workshop	31%	#23	CAN / SGP
Indigenous craft workshops	21%	#38	PHL
Local cooking schools / classes	19%	#48	AUS / CAN
Short courses or workshops	17%	#59	HKG

AUSTRALIAN TOURISM CASE STUDIES THAT DELIVER THIS EXPERIENCE

Image: Tourism Australia

WUKALINA WALK – TAS

milaythina nika milaythina mana | this land is our Country

Walk across the traditional land of Wukalina (Mt William National Park) and Larapuna (Bay of Fires) in North-East Lutruwita (Tasmania). This incredible four-day guided journey of hiking and cultural activities is your introduction to Palawa culture. They are the First Nations peoples of Lutruwita with connections to this area going back thousands of generations and want to share that connection with you.

As part of this experience, you'll meet Elders, hear Creation stories, and find out about some of the traditional medicines and foods. Feast on mutton bird and wallaby, cook doughboys over an open fire, enjoy fresh seafood and drink great Tasmanian wine.

These cultural practices connect us to our Ancestors, teaching you how to make kelp baskets and clapsticks and show you how to weave and construct a shell necklace.

Although history is an integral part of this tour, award-winning Wukalina walk is as much about the lives of us as Palawa today.

Joining the walk supports self-determination and an equitable future for all.

TRAVELLERS DRIVING HIGHER DEMAND FOR THIS EXPERIENCE

Of the Immersive experiences researched, Farm Experiences was the most popular, particularly for Luxury Travellers and families (both younger and older) as well as travellers from Singapore, China, Hong Kong and Vietnam. The experience had with lower levels of appeal for travellers from Canada, the USA and New Zealand.

At a global level and for travellers from most markets, Forest Bathing held medium levels of appeal. Travellers from Indonesia and Taiwan see it as highly appealing, ranking in their top 10 experiences. It is also a popular experience for travellers seeking Into Nature experiences.

Cheese and chocolate workshops appealed to just under a third of travellers globally, with similar levels of interest across traveller types and most markets.

INTERESTS

This experience cluster comprises a diverse range of 'Hobbies and passions' that can drive travel to a destination in of themselves or could be one of a number of experiences that people are open to trying when they are at a destination. Sports and sporting events, photography and hobbies such as fishing all fit into this category.

HOBBIES AND PASSION POINTS

> I am photographer and I really want to capture beautiful places. Traveling makes you a storyteller. I love to tell stories through my photographs.
>
> HIGH YIELD TRAVELLER: **INDIA**

> 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: **STH KOREA**

TRAVELLER INTEREST (GLOBAL excl. AU) AND HIGHEST APPEAL (RANK)

PHOTOGRAPHY

Photography	39%	#1	THA
Stargazing / night sky photography	33%	#9	KOR

HOBBIES

Sports events	25%	#30	CHN
Horse riding	20%	#44	IND
Fishing	19%	#42	VNM
Golf	11%	#68	KOR

AUSTRALIAN TOURISM CASE STUDIES THAT DELIVER THIS EXPERIENCE

Image: Tourism Australia

EARTH SANCTUARY – NT

Sustainable Living Now For Future Generations

Located in one of the darkest regions on the planet, visitors are able to not only learn about celestial bodies via informative star talks, but to also explore the skies using a number of deep sky telescopes operating at the Earth Sanctuary Observatory. Situated 15 minutes south of Alice Springs, Northern Territory, Earth Sanctuary has become a leader in the field of sustainability in ecotourism for over 15 years.

A proudly independent, family-operated business, they offer award-winning day and evening tours to visitors to the Outback. Specialising in ecology, culture and astronomy, Earth Sanctuary's guides carry a wealth of knowledge, skill and passion.

Image: Tourism Australia

TRAVELLERS DRIVING HIGHER DEMAND FOR THIS EXPERIENCE

Everyone with access to a camera has the ability to undertake Photography, but many travellers seek it as an actual experience. It appeals particularly to Long Stay Travellers and Working Holiday Makers, younger singles/couples with no kids and those looking for Adventure and Transformation from their travel. Travellers from Thailand and India in particular see it as highly appealing, ranking the experience 1st and 2nd respectively.

The Night Sky and stargazing also proved popular, particularly with younger singles/couples with no kids and travellers from South Korea who ranked it in their top 10 experiences.

EXTENDED

The Extended experience cluster involves a long stay at a destination with 'Full immersion into local culture'. The audiences most receptive to these experiences include travellers that are working or studying locally, or on a very extended holiday. These experiences provide the chance to discover and immerse into a culture, e.g. live like a local, learn the language and gain experience in something offered by the destination.

FULL IMMERSION INTO LOCAL CULTURE

> A chance for beach time at lunch, more time with the family as well as time to soak in the culture and becoming comfortable and familiar with the culture and learning the language.
>
> HIGH YIELD TRAVELLER: **UK**

> Working with scientists would be important because everywhere has restoration work that needs doing. Plus it's super important to educate and often the best way to do that is through hands on experiences.
>
> HIGH YIELD TRAVELLER: **NZ**

TRAVELLER INTEREST (GLOBAL excl. AU) AND HIGHEST APPEAL (RANK)

LIVE LIKE A LOCAL

Visiting friends, relatives	32%	#5	NZL
Socialise with locals	28%	#29	VNM
Homestays with local families	20%	#24	THA

TRAVEL +

Language immersion	28%	#15	THA
Workcation	20%	#27	VNM
Working holiday or internship	19%	#36	THA
Volunteering	14%	#73	NZL
Citizen science	13%	#64	IDN

AUSTRALIAN TOURISM **CASE STUDIES** THAT DELIVER THIS EXPERIENCE

Image: Tourism Australia

VISIT OZ – QLD

Where Every Day is an Adventure

Founded in 1991, Visit Oz /Australian Working Adventures is a family owned and run business based in Brisbane, Queensland, whose aim is to provide young people with a safe path to fulfilling their work, travel and personal development aims while visiting Australia. They have assisted over 30,000 young people from over 70 countries through their award-winning training and job services, providing preparation for work services and giving access to a unique range of employers with paid and volunteer roles all over rural and outback Australia. Immersive programs hosted at their Springbrook farm, include a four-day jet lag recovery weekend and a five-day farm work experience. They can provide these experiences for participants coming to Australia for anything from 3 months to 3 years.

TRAVELLERS DRIVING HIGHER DEMAND FOR THIS EXPERIENCE

Visiting friends or relatives for an Extended period appeals to Long Stay Travellers and those looking for Reconnection. It is an appealing experience for travellers from New Zealand who rank it 5th, as well as those from India, Australia, Philippines, and the UK.

As well as working holidays, Working Holiday Makers also showed strong interest in Language Immersion, ranking it 13th in appeal. Language Immersion is a highly sought-after experience for many travellers from Thailand, the Philippines, Vietnam, and Indonesia.

Image: Tourism Australia

SUSTAINABLE, INDIGENOUS AND INCLUSIVE TOURISM

Image: Tourism Australia

SUSTAINABLE TOURISM

GROWING IMPORTANCE OF SUSTAINABILITY AND SUSTAINABLE TOURISM

Emerging alongside the COVID-19 pandemic is a growing importance of sustainability in consumers' lives leading to a generally greater consideration on the role sustainability has across many aspects of their lives, including tourism.

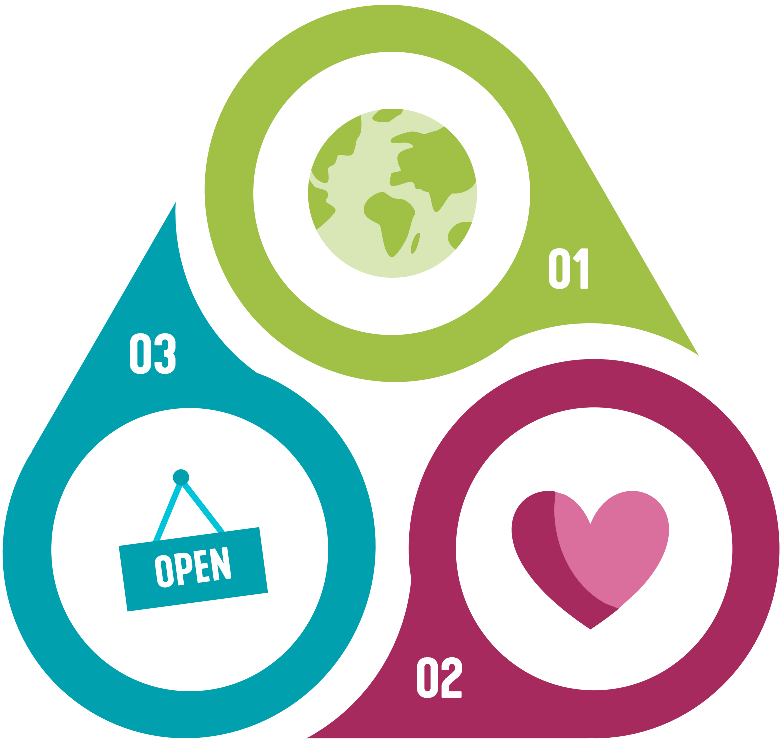
Sustainability is front-and-centre across many aspects of society and can be, when prompted, understood by travellers as an aspect of global tourism. Whilst the reality of sustainable tourism offerings doesn't yet match its potential, the outlook is positive. Engagement is limited by awareness, the availability and choice of experiences as well as education/benefit limitations.

There is evidence of a growing cohort of consumers for whom sustainability is influencing their travel choices as well as the kinds of experiences they want to have at their destination.

SUSTAINABILITY TOURISM DEFINED

Sustainability in the context of tourism relates not only to preservation but increasingly about regenerating what is lost and deeply honouring what is left through active sustainable behaviours and practices. It is the basic and deliberate practices undertaken both by travellers but also by the industry and operators to engage in sustainable tourism.

With travellers today there is engagement in basic, easy-to-do preservation practices, but less evidence of sustainable tourism shaping travel choices. Real-world examples articulated by travellers focus on passive or easy-to-do behaviours, expectations of travel providers to minimise their impact and with an environmental focus. However, there is increasing recognition of sustainable practices that relate to non-environmental elements of culture and local community.



01

FOR THE ENVIRONMENT – FROM WILDLIFE TO OUR PLANET

The place I'm visiting, the nature/wildlife I'm interacting with + the impact I'm having on our planet by travelling at all

- Reducing waste (plastics, water, carbon, pollution)
- Conserving energy, water or products when scarce or limited
- Reusing where possible, e.g. water bottles, towels
- Recycling, separating rubbish, avoiding single-use
- Offset programs, e.g. carbon offsets, tree-planting
- Not littering, not causing damage or negative impacts
- Using local products, buying local to cut unnecessary emissions
- Eco-friendly transport choices, e.g. train not plane, walk/bike
- Accommodation using self-sufficient or renewable energy sources
- Preserving and not damaging natural landscapes and features
- Donating to or volunteering at conservation/wildlife programs
- Ethical treatment, taking care of and not harming animals

02

FOR CULTURE – PEOPLE, AND ITS CULTURES

The people and the cultures I'm interacting with, and the society in which tourism is a part of their life/community

- Ethical treatment, not harming nor taking advantage of people
- Using local products, buying local to support the community
- Being mindful of cultural practices and protocols
- Not being disrespectful or rude
- Interact with the community, learn the language and support native/cultural traditions

03

FOR THE COMMUNITY – BUSINESSES/INDUSTRIES

The businesses I'm interacting with
+
the travel industry for that destination

- Spending locally to fund the tourism industry
- Re-visiting, recommending, to keep businesses going
- Supporting ethical business practices, e.g. Fair wage
- Supporting ethical industries, e.g. Fair Trade

Visual description:
The three elements associated with 'Sustainable Tourism', according to out-of-region travellers in the qualitative research.

AT A SIMPLISTIC LEVEL, 'SUSTAINABLE TOURISM' TODAY CAN BE DEFINED AS:

01 Do no harm, leave destinations as found.

02 Try to take up/choose sustainable options if available or when offered.

03 Follow any local sustainable practices (related to the environment, culture, and community/economy).

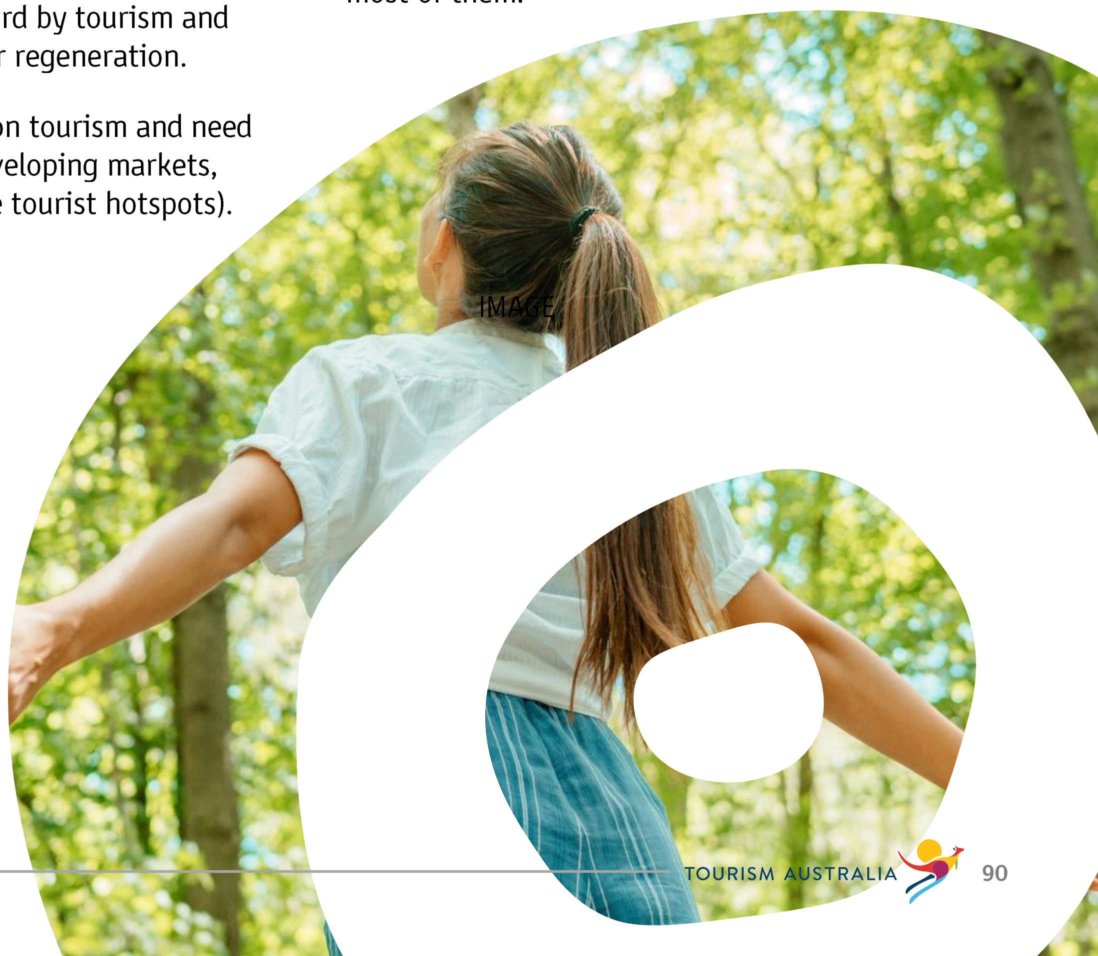
04 Avoid unsustainable or harmful practices.

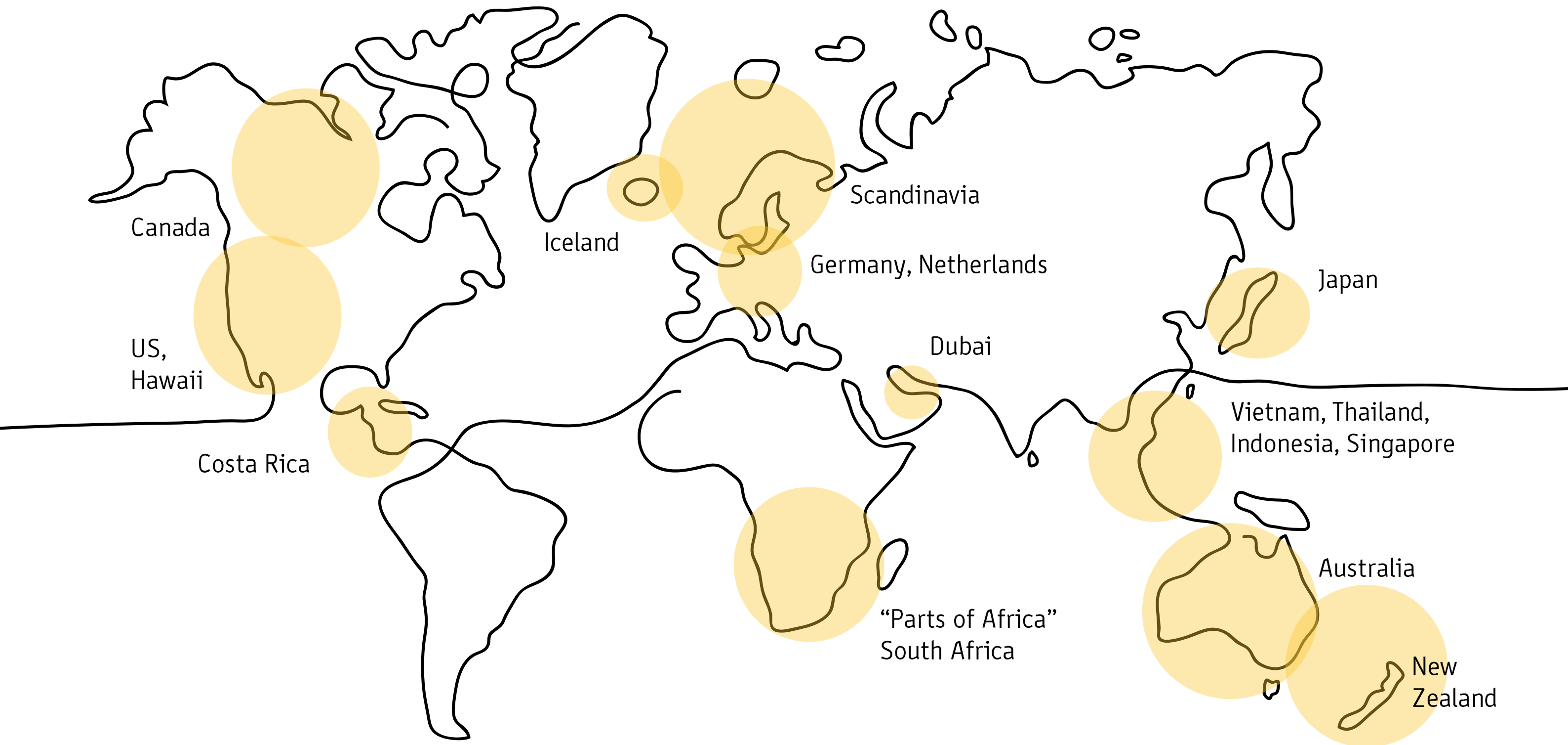
There are destinations, experiences and vacation styles that specifically fall under the sustainable tourism banner however this space is not yet clearly owned by any one destination or type of travel experience or vacation style. There is no known way to assess sustainability or claimed credentials in this space – any suggested leaders are based on assumptions or patchy examples. Furthermore, many travellers believe there are destinations, experiences, or vacation styles where sustainability is more important (where the positive future of a place or experience is fragile, based on the characteristic criteria below):

- Places associated with or defined by their wildlife or natural habitats (e.g. rainforests more important than city streets in this context).
- Places with important, fragile, or threatened wildlife or ecosystems, which should be kept pristine (e.g. Great Barrier Reef).
- Places with Indigenous cultures (e.g. Australia) that should be protected.
- Where culture, community or landscape has been damaged or hit hard by tourism and needs protection and/or regeneration.
- Places that are reliant on tourism and need a secure future (e.g. developing markets, areas that have become tourist hotspots).
- Where travel or tourism activities within an area take a particular toll and actions are needed to cancel out or decrease impact on the environment (e.g. destinations further away).

Australia is uniquely placed in its strong association to natural environments and the assumption by travellers that the Australian culture is focused on preservation of its natural environment and culture because of its strong association with wildlife and the outdoors. There is also the expectation that Australia, as a developed economy with strong natural heritage, has a perceived responsibility to act sustainably. However, these are broad assumptions that do not have a solid foundation.

The research provided identification of the extent to which travellers consider sustainable tourism practices to be important, their interest in engaging in each experience and their willingness to pay extra for sustainable practices. Around 2 in 10 out-of-region travellers are primed to engage in sustainable tourism or are doing so currently. They consider many sustainable practices important and are willing to pay for most of them.





Examples of reasons to consider a country to be a leading destinations in sustainability: clean air and environment in New Zealand, Costa Rica relies on renewable energy, Maldives tourists have to take back the rubbish they produce, Thailand have animal sanctuaries, Iceland don't litter and have a priority on recycling, South Africa have a clean city that reduces trash, Canada have recycling initiatives, Australia and New Zealand have eco retreats and nature preservation programs, Dubai provides a carbon footprint estimate, Finland have a low-emission airline, Singapore tourists are fined for dumping garbage, Germany has a well-equipped eco-friendly system.

"

Maybe hot sun rich countries such as Dubai – they have lots of oil but they also have lots of sun and money to invest in technologies - hopefully, they can leave the oil in the ground and utilise the sun for their energy needs and store that energy too

HIGH YIELD TRAVELLER: **UK**

I understand Australia has quite a strong inkling for such sustainability. With its many unique biodiversity not found anywhere else plus its reliance on climate, makes such work even more important than ever

HIGH YIELD TRAVELLER: **SINGAPORE**

"

Visual description:
Map shows countries/regions suggested as 'leaders' in sustainable tourism, according to out-of-region travellers in the qualitative research.

Image: Visit Victoria

SUSTAINABILITY PERSONAS

The research identified a sustainability classification that provides a useful way to understand and maximise the potential for sustainable tourism behaviours. This classification process involved dividing the broad consumer traveller market into sub-groups of travellers based on a shared characteristic.

This sustainability classification combines two market characteristics, or lenses:

LENS 1 [ATTITUDINAL]: THE IMPORTANCE OF SUSTAINABILITY:

The number of sustainable tourism practices that are considered important to do (rated 8, 9 or 10 on an 11-point importance scale, where 0=Not important at all and 10=Extremely important).

Ten sustainable tourism practices were rated on this scale and subsequently grouped into:

01 Few - four or fewer sustainable tourism practices were rated as 'important'.

02 Some – between five and seven sustainable tourism practices were rated as 'important'.

03 Many – eight to ten sustainable tourism practices were rated as 'important'.

LENS 2 [BEHAVIOURAL]: THE WILLINGNESS TO PAY EXTRA FOR SUSTAINABILITY:

The number of sustainable tourism experiences that the traveller is willing to pay extra for, that is the traveller would choose the experience that offers a sustainable tourism experience even if it involved paying a little more or a lot more.

Five sustainable tourism experiences were explored and subsequently grouped into:

01 None – would be willing to pay extra for 0 sustainable tourism experiences.

02 One or two – would be willing to pay extra for 1-2 sustainable tourism experiences.

03 Most/all – would be willing to pay extra for 3-5 sustainable tourism experiences.

The practices that were included in the research, to assess importance and willingness to pay for sustainable tourism practices.

Image: Tourism Australia

01 Offsetting travel emissions, e.g. carbon offset programs.

02 Using eco-friendly or sustainable transport to get around.

03 Staying in eco-friendly accommodation, e.g. using renewable energy sources.

04 Protecting (not damaging) the land or natural environment in the places you visit.

05 Participating in active conservation or rehabilitation programs.

06 Ethical treatment of animals and wildlife.

07 Ethical treatment of local people, e.g. fair pay.

08 Supporting local businesses, e.g. buying local products or services.

09 Respecting and preserving the cultural heritage of the destination or community.

10 Respecting and following cultural practices and customs.

Importantly, this classification – one that includes attitudes **and** behaviours – focuses attention on pushing travellers along the sustainability path, not just in terms of seeing the importance of sustainable tourism practices, but also in their willingness to pay more for experiences that include sustainable tourism options. This is critical during the transition from low awareness, availability, accessibility, and consideration of sustainable tourism options to a strong sustainable tourism market, and as providers are encouraged to firstly embed these practices and experiences, and secondly to make them affordable.


Image: Tourism Australia

ATTITUDINAL LENS / BEHAVIOURAL LENS

IMPORTANCE OF SUSTAINABILITY

Number of practices that are important to do – Rated 8/9/10 extremely important (of 10 shown)

WILLINGNESS TO PAY EXTRA

Number of practices willing to pay extra for (of 5 shown)

	FEW (0-4)	SOME (5-7)	MANY (8-10)	TOTAL
NONE (0)	16%	6%	10%	**32%**
ONE OR TWO (1-2)	11%	8%	11%	**30%**
MOST (3-5)	6%	9%	23%	**37%**
TOTAL	**33%**	**23%**	**44%**	

Visual description:
The behavioural and attitudinal lens that make up the sustainability segmentation.

There are nine possible outcomes when combining the two segmentation lenses (3 x 3). Through analysis and profiling of the nine sub-groups, we have created 6 personas:

Increasing importance of sustainability practices [ATTITUDINAL LENS]

22%

01 UNCOMMITTED

A few/some sustainable practices rated as important but unwilling to pay for any sustainable experiences

10%

02 SUPERFICIALIST

Many sustainable practices rated as important but unwilling to pay for any sustainable experiences

19%

03 DABBLER

A few/some sustainable practices rated as important only willing to pay for one or two sustainable experiences

11%

04 FOCUSED

Many sustainable practices rated as important and willing to pay for one or two sustainable experiences

15%

05 BELIEVER

A few/some sustainable practices rated as important and willing to pay for most/all sustainable experiences.

23%

06 DEVOTEE

Many sustainable practices rated as important and willing to pay for most/all sustainable experiences

Increasing willingness to pay [BEHAVIOURAL LENS]

Visual description:
The six sustainability segments.

Image: Tourism Australia

PROFILING SUSTAINABILITY-CONSCIOUS TRAVELLERS

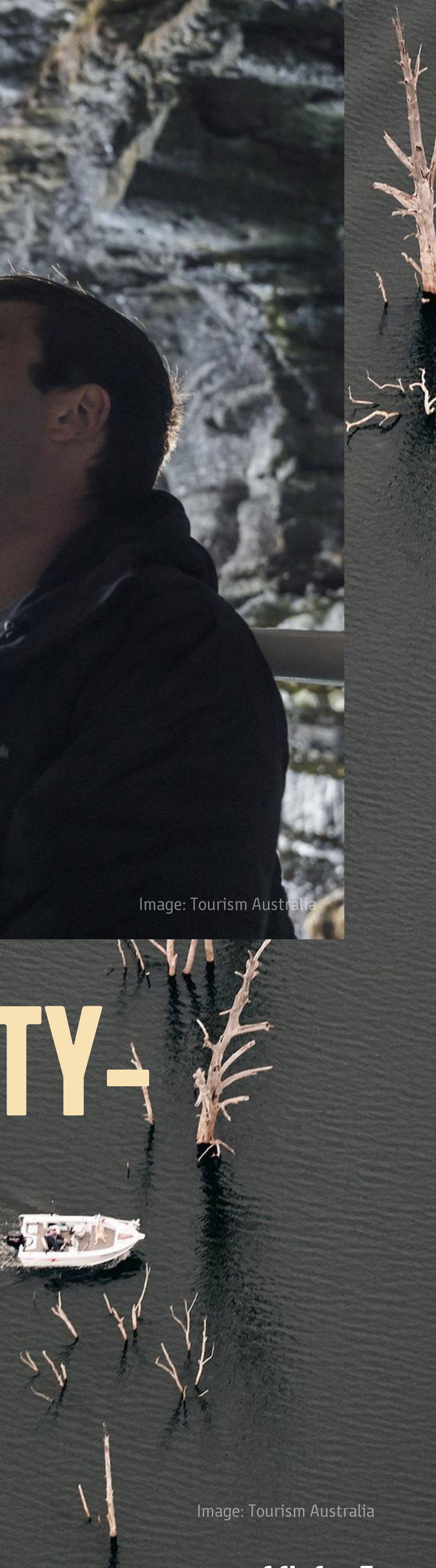


Image: Tourism Australia

LIFE STAGES, TRAVEL DEMAND SEGMENTS AND TRAVELLER TYPOLOGIES:

It is important to draw upon what we know about travellers who are seeking or have values aligned to engaging in sustainable tourism. These are the types of travellers who are more receptive to sustainable tourism practices, destinations and products.

- Life stages: Older and younger families.
- Travel demand segments: Working Holiday Makers, Long Stay Travellers, Luxury Travellers.
- Traveller typologies (the motivations or needs that travellers are looking for when considering destinations and experiences): Travellers travelling to get Into Nature or for Adventure, Transformation or Exploration.

MARKETS

- Australia
- Canada
- **China**
- France
- Germany
- HK Hong Kong
- **India**
- **Indonesia**
- Italy
- Japan
- **Malaysia**
- NZ
- **Philippines**
- S. Korea
- Singapore
- TW Taiwan
- **Thailand**
- UK
- USA
- **Vietnam**

LIFESTAGES

- Young single or double income, no children
- Older single or double income, no children
- Young Families
- Older Families

TRAVEL DEMAND SEGMENTS

- High Yield Traveller
- Luxury Traveller
- Long Stay Traveller
- Working Holiday Maker

TRAVEL TYPOLOGIES

- Reconnection
- Into Nature
- Exploration
- Adventure
- Transformation
- Passion, hobbies
- Restoration

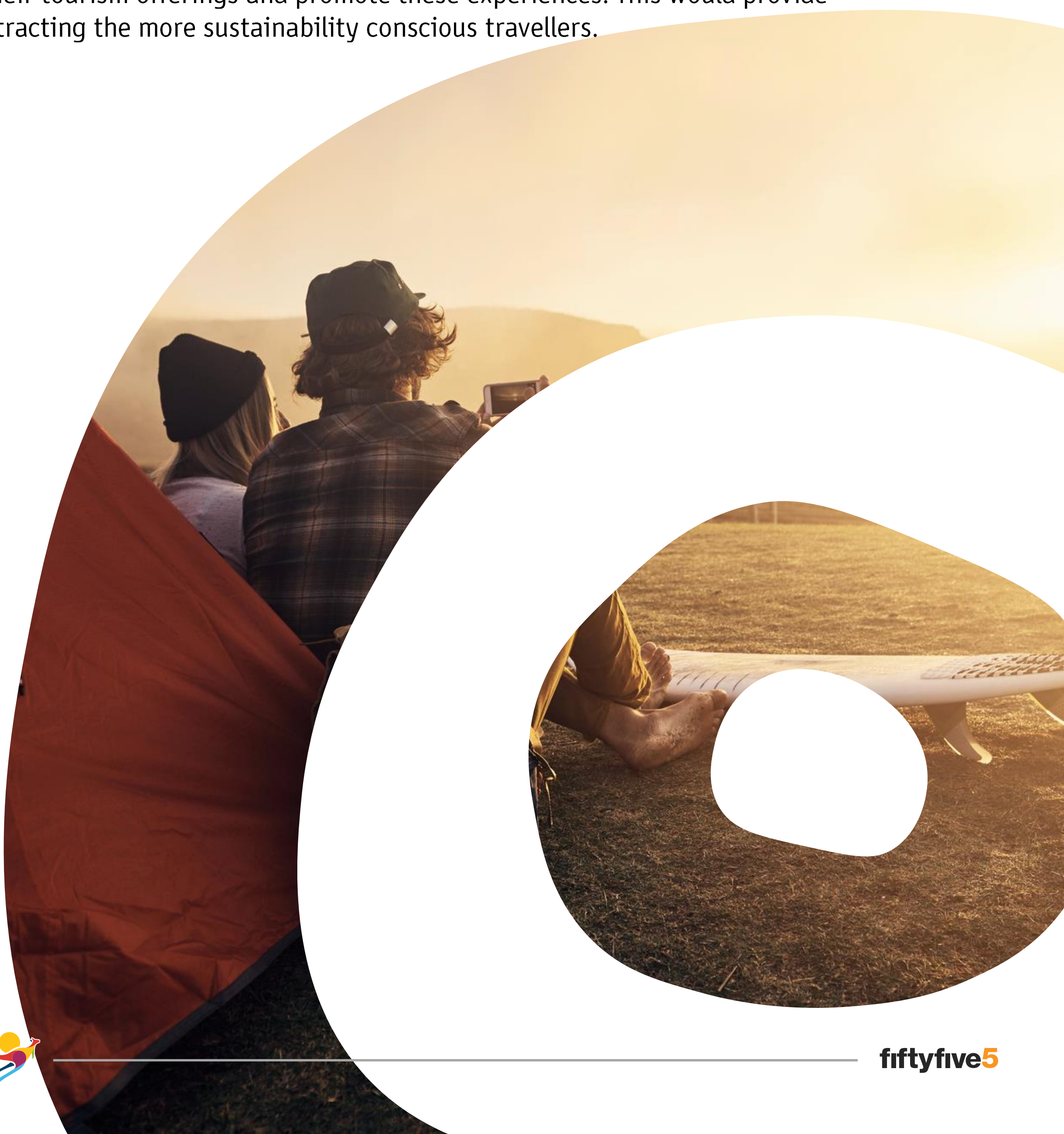
Visual description:
Markets, lifestages, travel demand segments and travel typologies that have a higher incidence of sustainability-conscious travellers (Devotees or Believers).

TRIP PROFILE, INCLUDING EXPERIENCE TERRITORIES

Sustainability-conscious travellers (Devotees and Believers) are similar spenders than less conscious travellers (Focused, Dabblers, Superficialists and the Uncommitted). Sustainability-conscious travellers tend to go for longer vacations than less conscious travellers, with an average of 18 nights compared with 13 nights for the less conscious traveller types.

Sustainability-conscious travellers are more likely to have luxury or premium accommodation budgets, whereas less conscious travellers skew to mainstream/average budgets. But this is only seen amongst the young family and older family traveller groups (there is no difference in budget amongst singles and couples). In terms of travel party, differences align with the life stage profiles of sustainability-conscious vs. less conscious travellers (i.e. Devotees and Believers tend to be young families).

In terms of experiences that resonate, there is higher interest from sustainability-conscious travellers (Devotees and Believers) in natural environment, heritage, wildlife, aquatic and coastal, local culture, recreation and outdoor, events and festivals, Indigenous, long stay, agritourism and learning experience territories, compared to less conscious travellers (Focused, Dabblers, Superficialists and the Uncommitted). Given the breadth of experience territories that are in demand, operators across the industry should consider embedding affordable sustainable practices into their tourism offerings and promote these experiences. This would provide value-adds in attracting the more sustainability conscious travellers.



MARKETS

When assessing interest in sustainability practices (and willingness to pay extra) at a market level, we need to consider three factors involved: the definition and understanding of 'sustainability', the practices that fall within this context, and the proximity to the impact of action vs. inaction:

01 AWARENESS, UNDERSTANDING AND IMPORTANCE OF SUSTAINABILITY IN EVERYDAY LIFE

Markets such as the UK, New Zealand and Australia, display a high awareness, understanding and importance of environmental sustainability in their everyday lives. There is a strong focus on practices such as avoiding single-use plastics, choosing electric or hybrid cars, planting trees or regeneration and supporting organisations that claim sustainability credentials or being 'environmentally friendly' options. This is supported by conscious-consumerism trends in these markets. The negative impact of not acting sustainably is recognised and most critical at a global level, but more and more present at a local level too (e.g. with recent examples of localised unprecedented and extreme weather events linked to increasing global temperature).

For these markets, cultural sustainability and community sustainability were less top-of-mind as potential ways to act sustainably, if considered at all.

In other markets, such as Japan, China and South Korea, 'sustainability' as a concept is more commonly associated with cultural and community-focused practices, e.g. supporting local businesses, paying fairly, being mindful of cultural practices within their market and destinations they are travelling to. Sustainability in terms of environmental sustainability is a more recent topic, brought on by global conversations and any local campaigns (e.g. as seen recently in India).

02 PRACTICES THAT FALL WITHIN 'SUSTAINABLE TOURISM' CONTEXT

Sustainable tourism as a concept covers environmental, community and cultural sustainability; and practices can be active vs. passive and focus on preservation vs. regeneration.

ACTIVE PRESERVATION

Actions directly minimise negative impact on environment, culture and/or tourism industry; actively protect things as they are, e.g. eco-preservation work, not harming wildlife.

ACTIVE REGENERATION

Actions directly help the environment, culture and/or tourism industry to flourish/ improve, e.g. wildlife rehabilitation schemes, planting trees.

PASSIVE PRESERVATION

Actions contribute to basic maintenance or protection of things as they are, do no harm, e.g. reduce/reuse/recycle.

PASSIVE REGENERATION

Actions contribute to/lack of action that supports regeneration over time, e.g. not over-travelling (counting carbon credits).

Across all markets, we see greater engagement and willingness to pay for practices which tend to be more passive in nature and preservation in focus, e.g. ethical treatment of animals, respecting local cultures and traditions. As in it's simplest form travel should not have a negative impact on the future of the environment.

Markets that display higher importance, more interest in and higher willingness to pay for these practices are China, Thailand, Philippines, India, Indonesia, Malaysia and Vietnam, as emerging out-of-region travel markets.

By contrast, in mature out-of-region travel markets, such as the UK, New Zealand and Australia, these practices are considered basic expectations of being a traveller and therefore claimed 'importance' of these practices is lower in these markets; they are seen simply as practices that are expected of them as responsible travellers.

Interest in and willingness to pay for active practices (whether preservation or regeneration in focus, e.g. offsetting travel carbon emissions via carbon credits, participating in active conservation or rehabilitation programs) will require greater exposure, clearer benefits (to traveller) and opportunities to drive engagement across all markets.

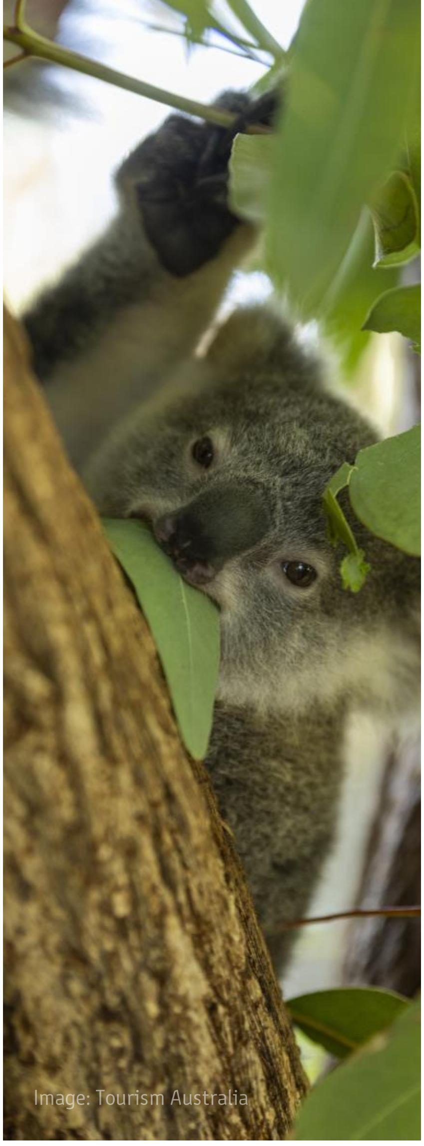


Image: Tourism Australia


Image: Tourism Australia

03 PROXIMITY TO THE IMPACT OF ACTION VS. INACTION

The third factor involved in assessing sustainability-conscious travellers at a market level is the proximity of each market's out-of-region traveller to the effects of sustainability action versus inaction.

For instance, out-of-region travellers from the UK will be exposed to environments, cultures and communities that are vulnerable to the impact of inaction in sustainability when they travel out-of-region or when engaging in experiences or vacation styles out-of-region, for example when visiting India. It is less visible when they travel domestically or within region. Out-of-region travellers from India, however, will be exposed to vulnerable environments, cultures, and communities when they travel to out-of-region destinations, but they will also see the impact of inaction domestically and when they travel within region.

The claimed importance of sustainability practices is higher in markets such as China, Thailand, Philippines, India, Indonesia, Malaysia, and Vietnam (compared to the UK, Australia, New Zealand). Especially as out-of-region travellers from these markets note the heightened sense of individual responsibility that comes with being an out-of-region traveller.

MAXIMISING THE OPPORTUNITY OF SUSTAINABLE TOURISM

The outlook, demand and engagement in sustainable practices is positive but relies on stronger presence, greater options, and re-education on the benefits of engagement. While society's values are shifting to emphasise sustainability, there are key knowledge and perceptual barriers to engaging in sustainable tourism including concerns about added cost and lack of authenticity of these offerings.

In order to clearly articulate a sustainable tourism positioning, the concept as a whole needs to become more prominent and clearer to travellers. This includes a well-defined offering that not only sums up the values that the Australian tourism sector holds but also articulates what this translates to in terms of real experiences. It requires the industry and travellers to become more aware of what sustainable tourism encompasses not just environmental or eco-travel focused. Without known ways to assess sustainability, we need to make it easy for travellers to know when and how they are contributing to a more sustainable way of travelling, to help them make sustainable choices.

Travellers require clearly articulated benefits and increased options so that they can identify how sustainable tourism aligns with their personal values and travel needs. Sustainable tourism can make travellers feel better about engaging in travel, and is a strong motivator in emerging markets, such as India, Malaysia, Philippines, Indonesia, Thailand, and Vietnam. However, currently the core motivators for sustainable tourism are more altruistic: that it is the right and moral thing to do and that it benefits future generations. This is particularly the case in developed markets.

Currently, there are conflicting roles and priorities of sustainability and travel beyond the basic responsible traveller practices, which include some passive sustainable practices.

Travel is associated with joy and pleasure, a time for relaxation and escaping the pressures of daily life. Sustainability, particularly as it relates to active practices, can be associated with an element of doom and gloom – the antithesis to the desired feelings from travel. Travel has obvious benefits to the self while sustainability has benefits for others, less for the self. This is particularly the case with myths that promote the belief that sustainable tourism is too expensive or involves additional costs.

To maximise the opportunity for sustainable tourism, destinations, industries, and providers need to build benefits into current travel behaviours that are more sustainable and avoid the implications of huge change or compromise.

There is significant opportunity for Australia to have a solid reputation for sustainable tourism both as a destination and with individual offers. This key societal trend will continue to gain momentum on a global level, and it is up to the industry to support sustainable practices and provide product options that engage with travellers in this way. It is also important to understand that while values can be aligned to sustainable practices within tourism, travelling with sustainable purpose is not a primary driver underpinning most travel occasions. Sustainable tourism within Australia needs to complement our beautiful and unique destination and provide an additional feel-good reason to choose to visit and enhance the memories created.

Image: Tourism Australia

INDIGENOUS TOURISM

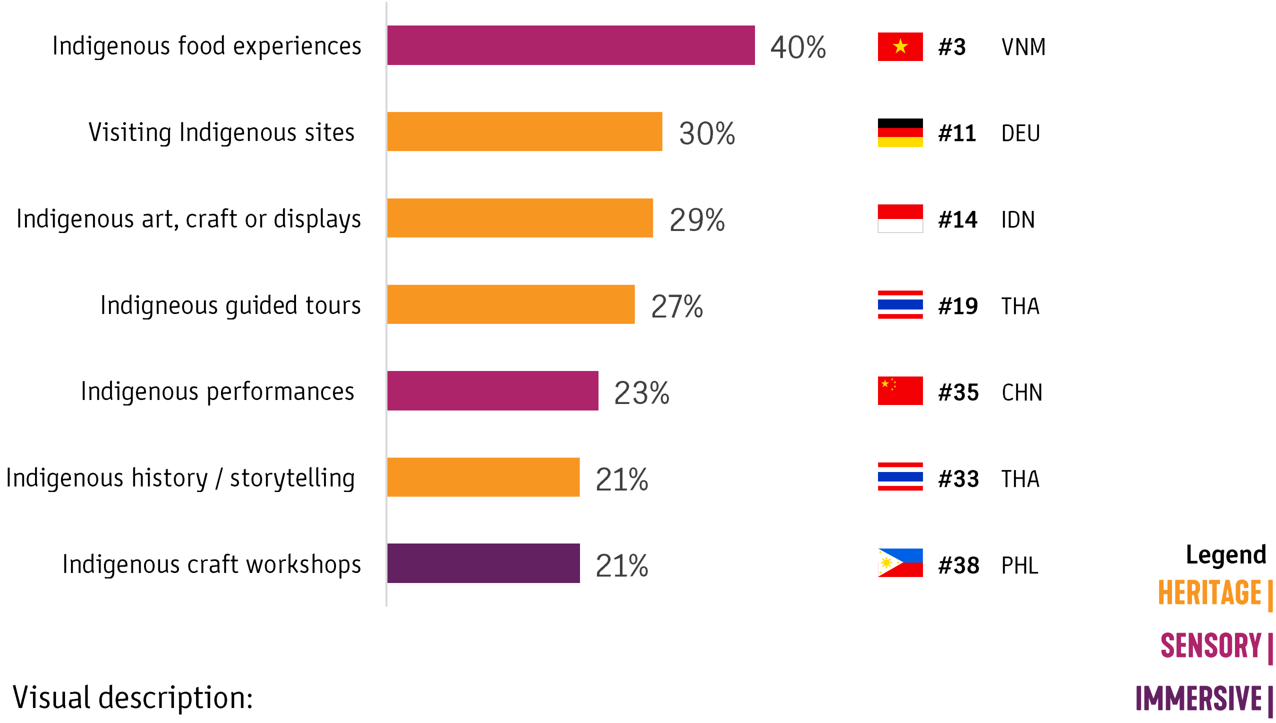
Indigenous tourism offers a chance for travellers to experience local authenticity, new vibrant cultures, immersive experiences, and a sharing of knowledge. It is predicted to be a growing travel trend.

Within Australia, Indigenous tourism can provide local authenticity and first-hand experiences from a First People's culture that offer an unbroken lineage to place. Travellers have an assumption of Australia respecting the land and its First People, however as a destination we are less well known for specific Indigenous experiences compared to destinations such as Bali or Hawaii, and less known in the traveller mindset than New Zealand and Greece for demonstrating preservation and a sharing of cultural history.

INDIGENOUS TOURISM TODAY

Indigenous tourism is viewed with mixed appeal, driven by limited understanding and concerns of discomfort. There are barriers to getting travellers to engage especially due to unfamiliarity or concerns about the political, economic, and ethical aspect of Indigenous tourism experiences, concerns about cost, discomfort, vulnerability, and safety, especially when there are assumptions about the remoteness of offerings and hesitation about potential lack of authenticity.

INDIGENOUS APPEAL SPANS MULTIPLE SECTORS



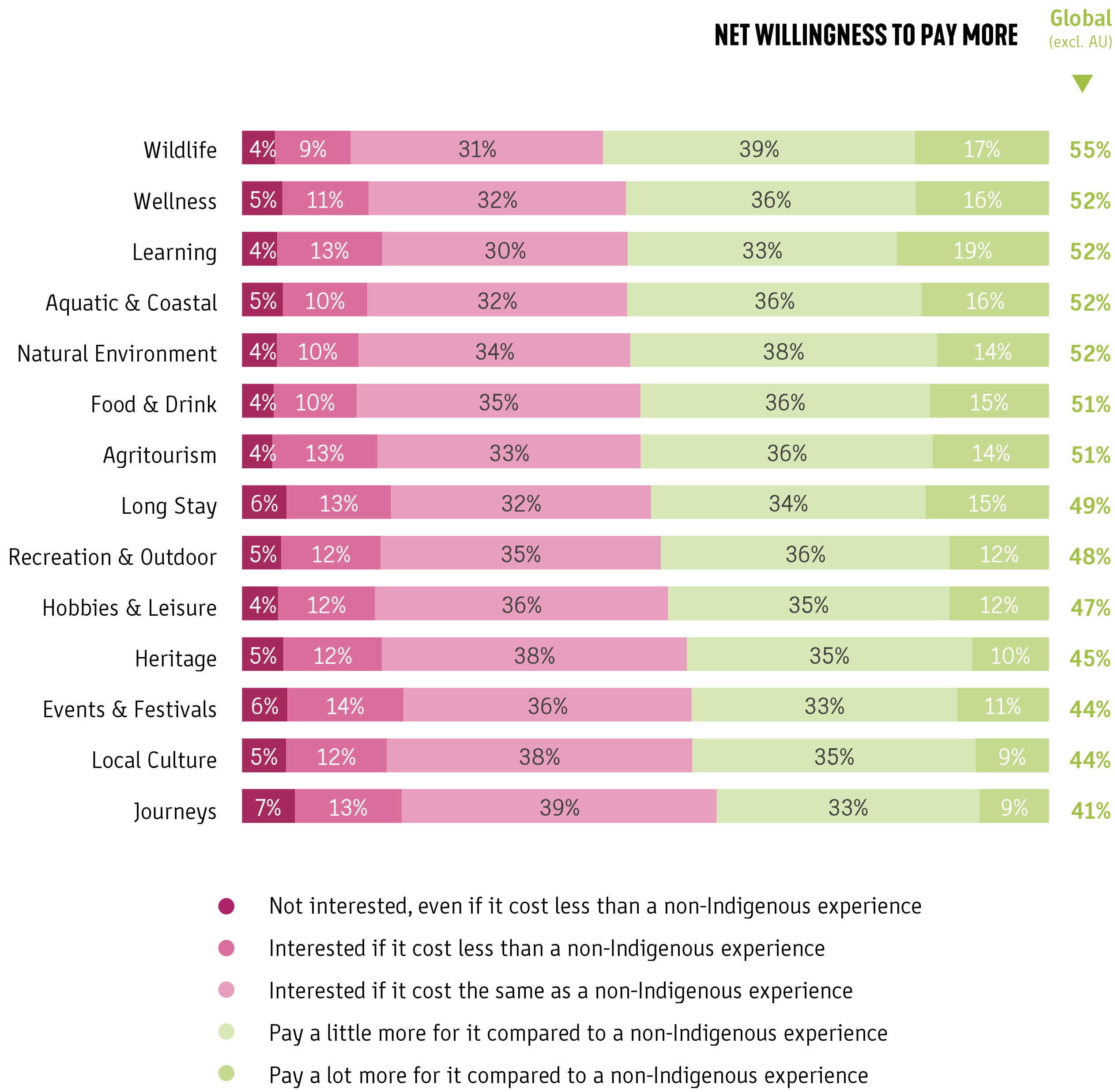
Overarching experience clusters

Visual description:
Indi/enous experiences that were explored in the research, traveller interest (Global excl. AU) and highest appeal (rank).

QUESTION SET-UP

Indigenous peoples are distinct social and cultural groups that share collective ancestral ties to the lands and natural resources where they live, occupy or from which they have been displaced. You may also know of this by other words, such as First Nations, Native, Traditional Owners, Aboriginal, or by the names of specific cultures or tribes.

If you had the opportunity to do the following types of experiences in an Indigenous setting or with Indigenous people, which of the following is true?



Visual description:
Interest and willingness to pay for experience territories in an Indigenous setting or with Indigenous people.

CORE BARRIERS TO APPEAL IN INDIGENOUS TOURISM EXPERIENCES

01

Unfamiliarity with the term and confusion in the definition.

Unfamiliarity with or concerns about political, economic and ethical aspect of Indigenous tourism/ experiences.

02

With some politicisation of the reference ‘Indigenous’ and debate around racial equality and plight of vulnerable populations wracked by colonialism.

03

A lack of awareness of Indigenous tourism experiences.

Assumptions or myths of remoteness, exploitation or being unpleasant for the traveller (uncomfortable, academic or burdensome).

04

Or limited to examples that are **well-worn** and can evoke memories or anecdotes of **negative experiences.**

05

Engagement barriers which include fears around cost, discomfort or vulnerability (e.g. lower standards of cleanliness).

06

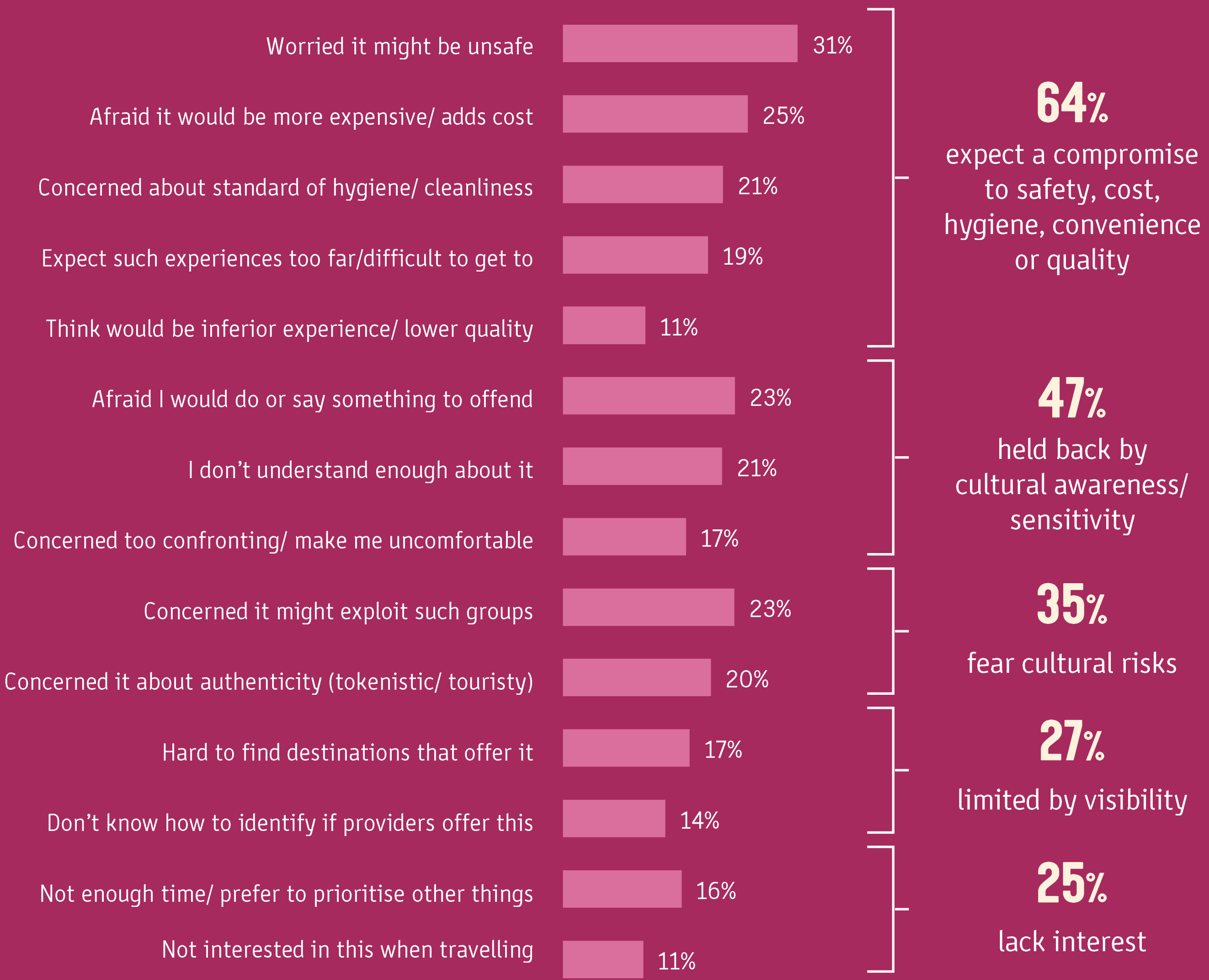
All of which jars with how out-of-region travellers want to feel when they contemplate out-of-region travel.

And acting as a deal breaker or limiting appeal (especially at a cost).

Visual description:
The core barriers to appeal in Indigenous tourism experiences, according to consumers in the qualitative research.

BARRIERS TO CHOOSING EXPERIENCES IN INDIGENOUS SETTINGS

What would prevent you from choosing experiences in Indigenous settings or with Indigenous people more often?



Visual description:
Indigenous experiences that were explored in the research.

Once exposed to the idea and potential experiences, out-of-region travellers show interest in experiences in an Indigenous setting or with Indigenous people, including willingness to pay extra for those experiences, which demonstrates the ways an Indigenous lens can add value to other experiences. Some standalone Indigenous experiences attract strong demand in their own right, and we see multiple pathways to Indigenous appeal. In addition to those interested in Indigenous as an expression of Heritage tourism, we also see Indigenous appeal infused throughout other sectors – such as among foodies who are interested in Indigenous food experiences as a unique style of culinary indulgence.

Appeal is driven by a range of aspects of Indigenous experiences, including: Learning about the Indigenous culture and the rich history of the land. Deepening the connection to the destination and locals. Learning about the past and how to preserve culture and place. Experiencing a unique culture that could not be seen at home, with interesting scenery and housing, clothing and traditional artifacts of the area where Indigenous people reside. Gaining a new perspective on a destination and its heritage sites by getting out of the tourist bubble and broadening their horizons). Learning ancient knowledge about food, medicine and land stewardship. Expecting to have the experience in a remote or non-tourist place with untouched nature and community.

Images left to right: (01, 02, 03) Tourism Australia, (04) Tourism and Events QLD, (05) Destination NSW, (06) Tourism Tropical North QLD

01

Learning about the Indigenous culture and rich history of the land helps deepen connection to destination and locals.

Adds to the richness of the local experience.

02

Learning about/from the past and preserving it is interesting.

03

Experience a unique culture that could not be seen at home, with interesting scenery, houses/ dwellings, clothes or traditional artifacts of the area where Indigenous people reside.

04

Opportunity to gain a new perspective on a country and its heritage sights -- getting out of the tourist bubble and broadening your horizon.

05

Learning and preserving ancient knowledge about food, medicine, land stewardship.

06

Many expect the experience will be remote and therefore there is the expected benefit of 'untouched nature' (e.g. Amazon).

Visual description:
The aspects which enhance appeal in Indigenous tourism experiences, according to consumers in the qualitative research.

When exposed to the possibility in Australia, potential visitors are interested in these experiences, especially when paired with appealing experiences that can be authentically delivered such as nature, wildlife, coastal and agritourism. Experiences that have the greatest appeal include Indigenous food, visiting Indigenous sites and communities, guided tours and being exposed to Indigenous art, craft, or cultural displays.

MAXIMISING THE OPPORTUNITY OF INDIGENOUS TOURISM

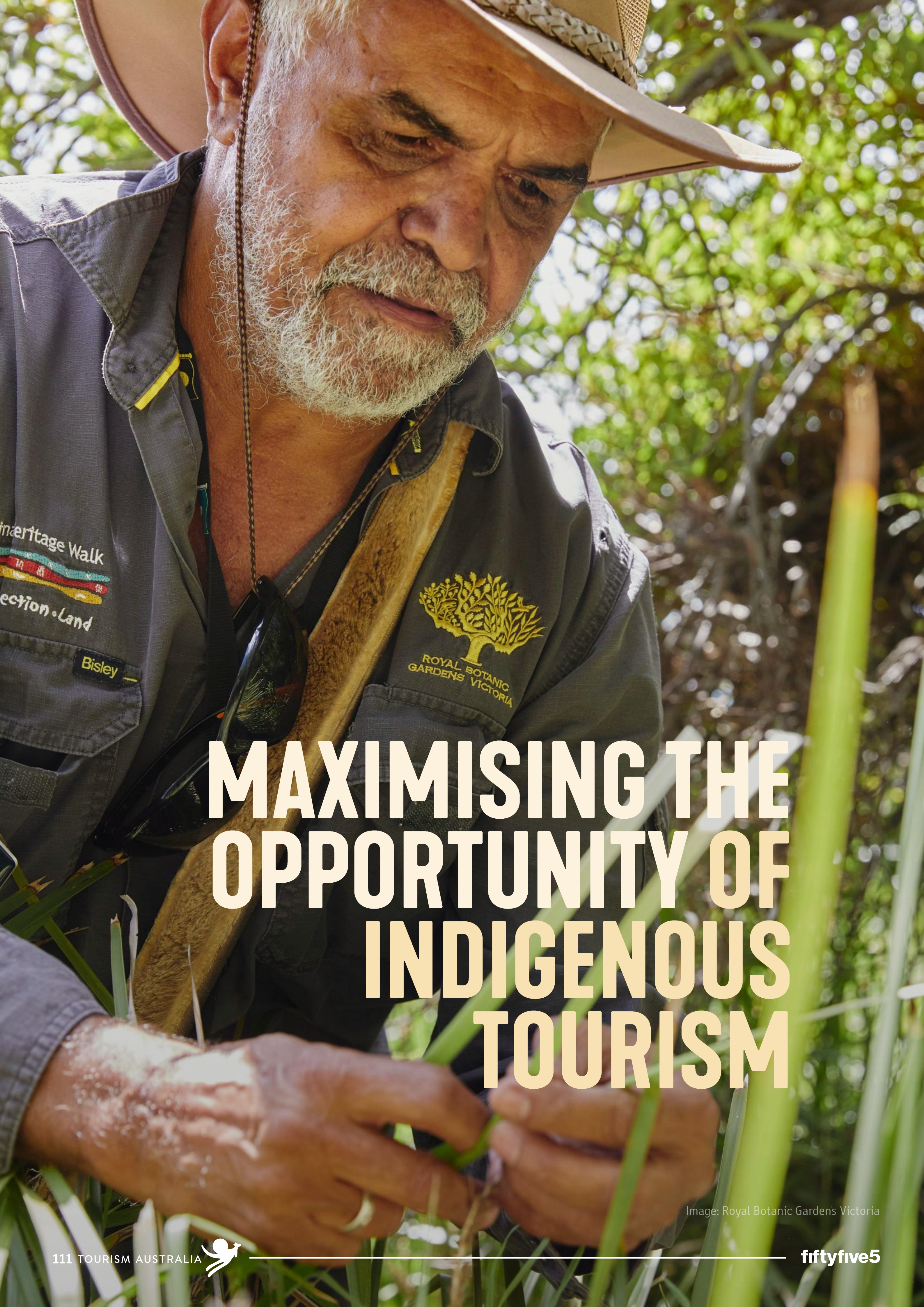


Image: Royal Botanic Gardens Victoria

CREATING AN AWARENESS

Indigenous tourism is currently viewed with mixed appeal, driven by limited understanding and concerns of discomfort.

There's limited awareness and understanding of what indigenous experiences could be, with many expecting them to be remote, uncomfortable or unpleasant, time-consuming, heavily academic or burdensome, all of which can be deal breaker or limit appeal (especially at a cost).

There's opportunity to bust these myths and demonstrate that indigenous tourism can be a chance for cultural immersion and enjoyable learning as they go to experience an integral and cherished part of a nation's or community's culture.

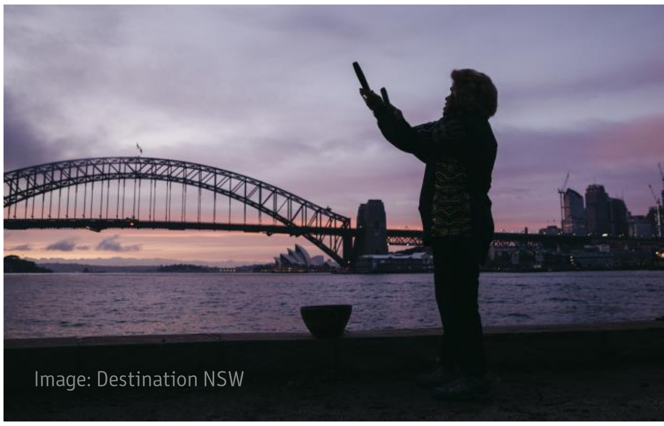


Image: Destination NSW

BUILD TRUST & AUTHENTICITY

Trust and authenticity are critical to unlocking the potential of Indigenous tourism and demonstrating the ethical credentials of the experiences.

In facing several myths and some experiences/stories of when it's not done well, indigenous tourism must take care to deliver experiences that are authentic and ethically sound.

For a traveller to engage, it must be without fear of exploitation or need to research before they participate.


Image: Tourism and Events QLD

FOCUS ON CULTURAL IMMERSION

Indigenous tourism has a natural fit with certain experiences, and can be unlocked with a strong focus on cultural immersion.

Best case examples demonstrate an opportunity to build demand with easy, fun, accessible experiences first. Those that have a clear benefit and are positioned as an integral part of getting to know local culture. And that can be done authentically within a market. These experiences offer a chance to learn about the culture, builds appetite to learn more, demystifies and contextualises Indigenous experiences as another form of enjoyable cultural immersion.


Image: Tourism Australia

Visual description:
The core opportunities for Indigenous tourism.

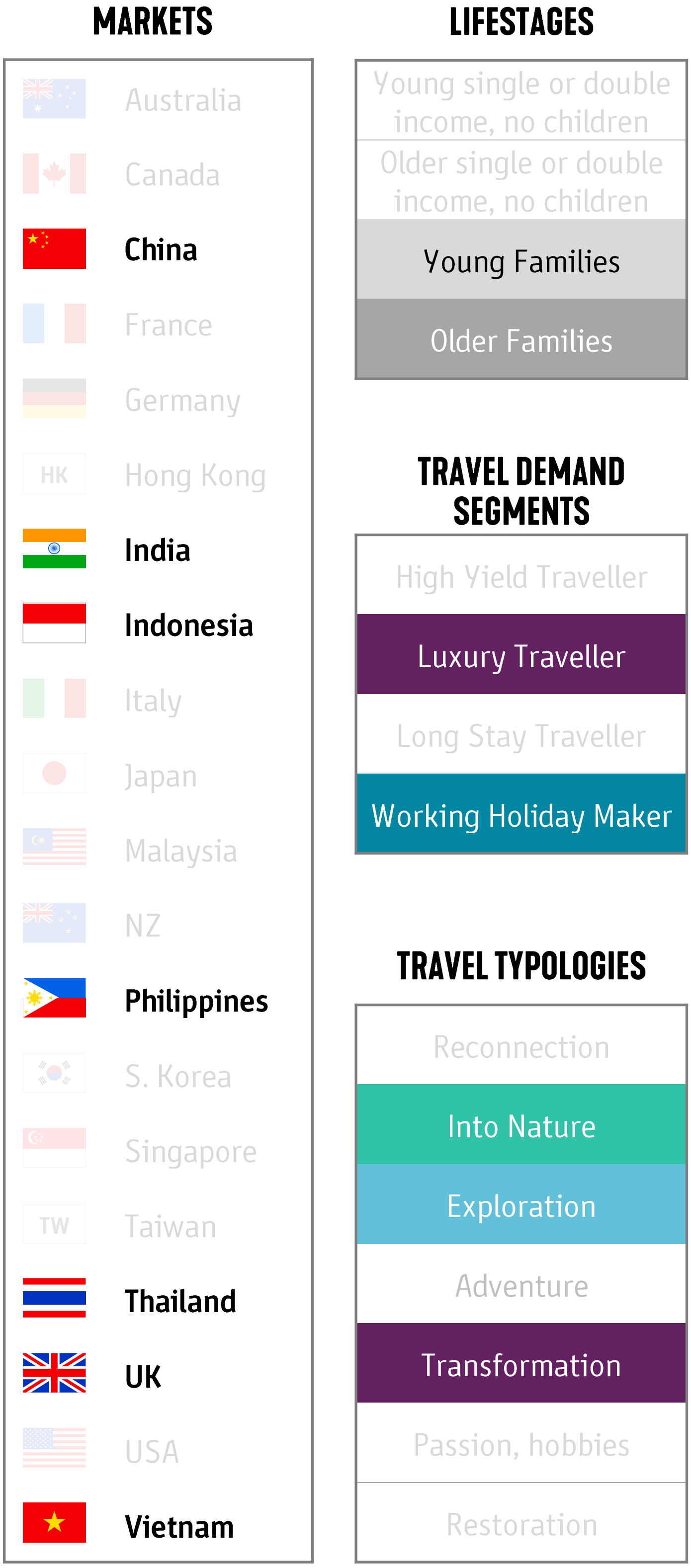
Indigenous businesses and Indigenous-led partnerships will be critical to meeting demand in a way that balances respect with best-practice customer experiences.

Best case examples show opportunity to build demand with:

- Experiences that are easy, fun and accessible, i.e. with immersive opportunities.
- Experiences with natural fit with Indigenous tourism.
- Experiences that can be done authentically within a market.
- Experiences that have a clear benefit and is positioned as an integral part of getting to know local culture.
- Experiences that are ethically sound.

As with sustainable tourism, Indigenous tourism may not be a strong standalone driver of destination choice, but can be a unique and special enhancement for out-of-region travellers. Australia is strongly associated with experiences of wildlife and natural environments including coastal, learning, recreation, outdoor experiences and agritourism all of which can tie in nicely to Indigenous tourism opportunities.

Indigenous tourism offers key benefits to travellers to learn about the culture and rich history of the land, helping to deepen connection to the destination and its locals. It can also provide an avenue to escape the traditional tourist bubble, share ancient knowledge about food, medicine and land stewardship and provide opportunities to engage in ‘untouched nature’. There is much to promote about the uniqueness of Indigenous tourism within Australia.



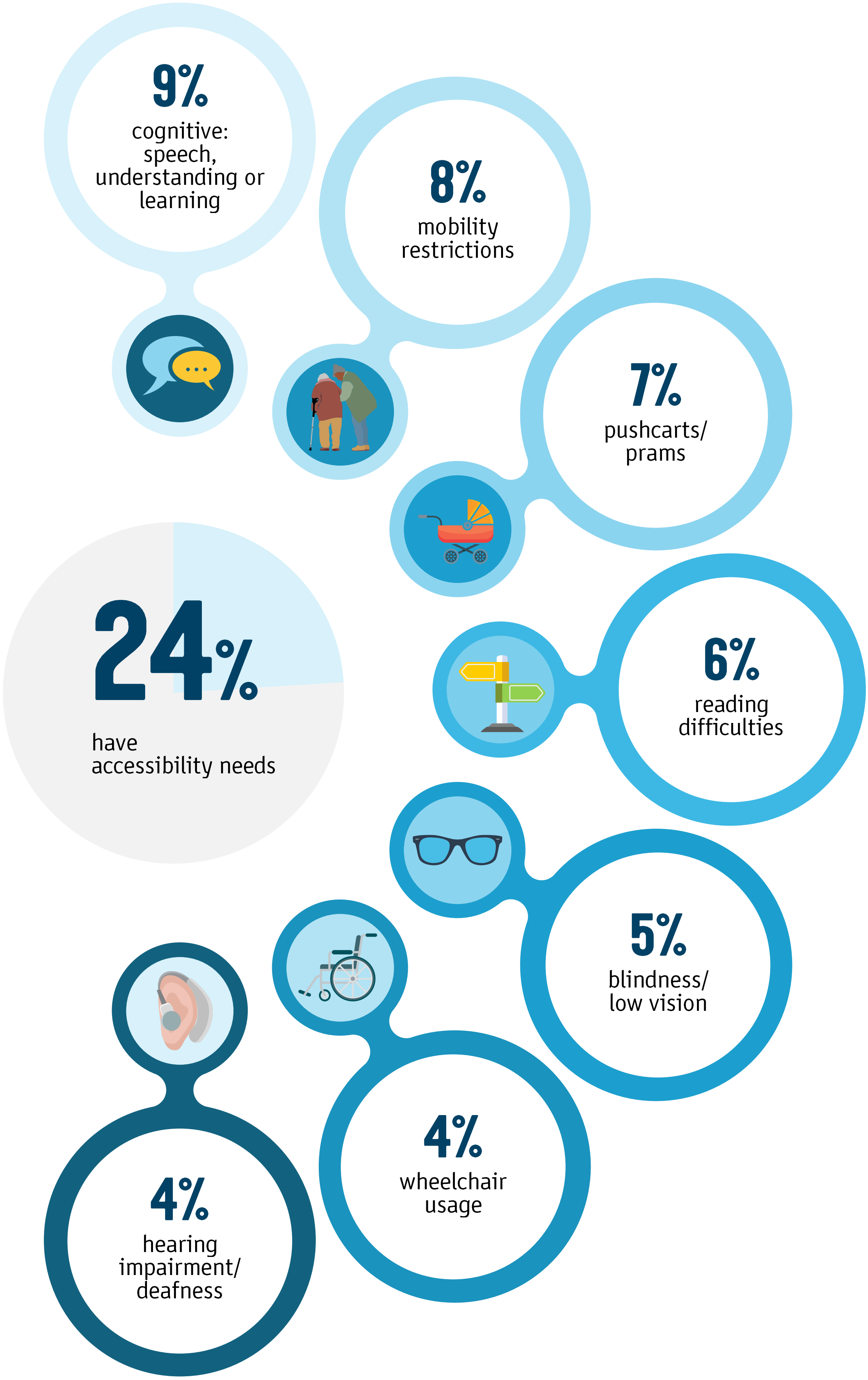
Visual description:
Markets, lifestages, travel demand segments and travel typologies that have a higher incidence of travellers that are willing to pay more for Indigenous experiences.

Image: Tourism Australia

INCLUSIVE TOURISM

INCLUSIVE TOURISM DEFINED

One in four travellers have accessibility needs. Accessibility needs relate to any instance where a traveller or a member of their group have additional requirements regarding mobility or communication needs. It goes beyond physical or visibly noticeable impairments and extends into any mobility, visual, audio or cognitive consideration. Accessibility needs are highest among young families and Long Stay Travellers.



Visual description:
The incidence of travellers with physical or other accessibility needs, amongst the out-of-region traveller population.

PROFILING TRAVELLERS WITH ACCESSIBILITY NEEDS:

It is important for the industry to ensure that stereotypes are kept in check.

While younger families have a higher incidence of accessibility needs themselves or within their travel party, accessibility needs affect all ages and life stages and traveller demand segments.

MARKETS

- Australia
- Canada
- China
- France
- **Germany**
- Hong Kong
- **India**
- **Indonesia**
- Italy
- Japan
- **Malaysia**
- NZ
- **Philippines**
- S. Korea
- Singapore
- Taiwan
- **Thailand**
- UK
- USA
- **Vietnam**

LIFESTAGES

- Young single or double income, no children
- Older single or double income, no children
- **Young Families**
- Older Families

TRAVEL DEMAND SEGMENTS

- High Yield Traveller
- Luxury Traveller
- **Long Stay Traveller**
- **Working Holiday Maker**

TRAVEL TYPOLOGIES

- Reconnection
- Into Nature
- Exploration
- **Adventure**
- **Transformation**
- **Passion, hobbies**
- Restoration

Visual description:
Markets, lifestages, travel demand segments and travel typologies that have a higher incidence of travellers that have accessibility needs themselves/in their party.

Travellers with accessibility needs have slightly higher adventurous and transformation needs from their travel, wanting to meet new people, challenge themselves, travel with a purpose and have transformative experiences.

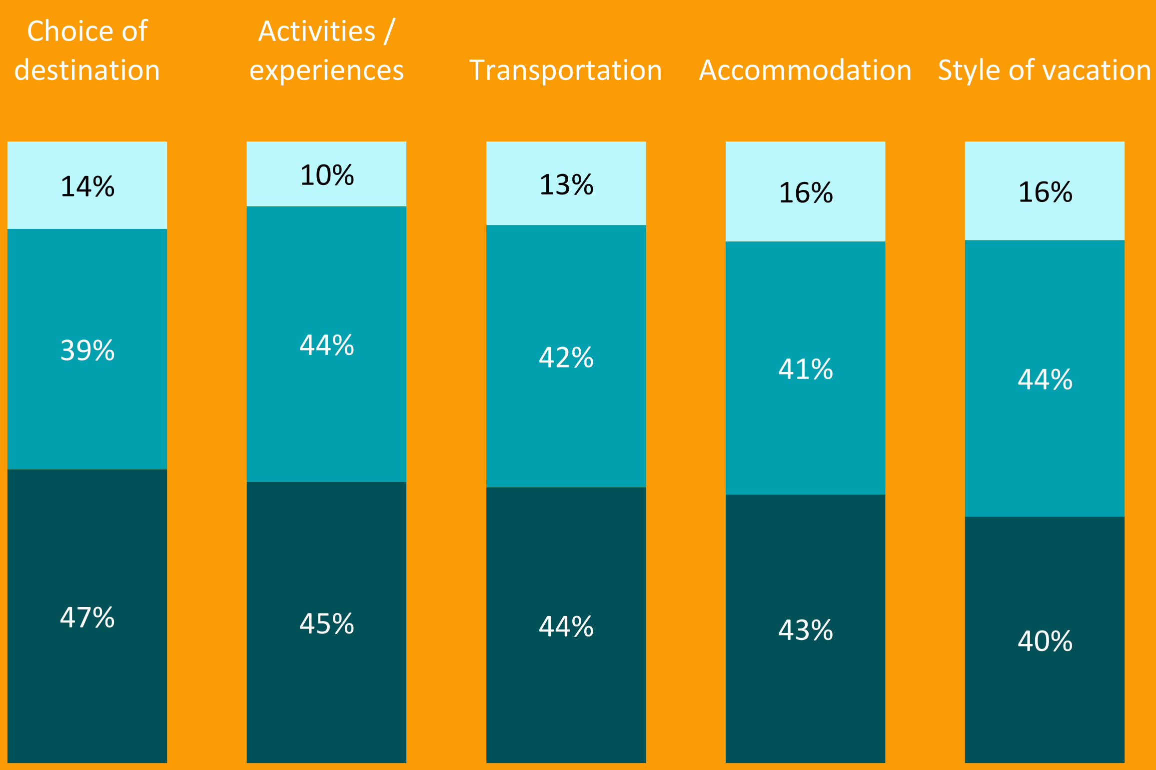
Travellers with accessibility needs tend to go for longer vacations than those without accessibility needs (across all lifestages except older singles/couples), with an average of 22 nights vs. 12 nights. And they are more likely to have luxury and premium accommodation budgets than those without accessibility needs (even once lifestages have been accounted for). Travellers with accessibility needs are more likely to travel with others – as a family with adult children, with dependent children, with parents, or with extended family members. But they are also more likely to travel with a carer and as part of an organised tour.

Travellers with accessibility needs often understand that higher costs might be associated with their travel and will factor this into their planning to secure the options that work for them.

In terms of experiences that resonate for travellers with accessibility needs, there is a higher interest from travellers with accessibility needs in several experience territories except for natural environment and food and drink. This aligns with their travel needs of adventure, transformation and challenging themselves and can be found across experience territories that are of high interest including journeys, hobbies and leisure, aquatic and coastal, wildlife, heritage, recreation and outdoor, wellness and events and culture. These experiences are of high interest to at least one in three travellers with accessibility needs.

INCLUSIVE TOURISM TODAY

Travel intentions are the same with or without accessible needs, but the reality forces a different experience. Travellers with accessibility needs seek similar experiences and want to travel for similar reasons however their accessibility needs have a big influence on travel especially choice of destination, style of vacation, activities/experiences, accommodation and transportation once there.



Those with accessibility needs are broadly seeking the same things from travel, with a slight increase in adventure and transformative motivations

We see higher accommodation budgets (more premium and luxury) when accessibility needs have some/a big influence on accommodation

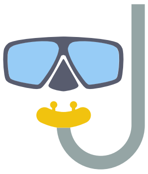
No influence · Some influence · A big influence

Visual description:
Accessibility needs have a big influence on many aspects of travel, especially choice of destination and travel activities/experience.

Parts of the industry also suffer from a misunderstanding as to what accessibility needs are and the underlying desires of travellers who have accessibility needs. This has led to accessibility needs often not being fully catered for and creating a disconnect between the desires versus experiences of someone with accessibility needs.

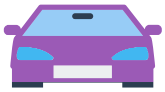
CHOICE OF DESTINATION

Primarily driven by personal interests (like travellers without accessibility needs) but with a need to know that a holiday there can be adapted suit their accessibility requirements.



ACTIVITIES/ EXPERIENCES

Desired activities are often the same for those without accessibility issues but are often not feasible at all, not as they are or need to be heavily adapted to be done.



TRANSPORT

Motorised trikes, helicopter, rail and cruises can be better suited to see sights and cover more distance (e.g. than is possible in a wheelchair), which comes at a higher cost. Driving can be impossible for some accessibility needs, without a driver or companion

ACCOMMODATION

Accommodations need to cater to accessibility requirements, which can come at a higher cost. Sometimes a higher focus on accommodation with views and wellness features, to enjoy rest days.

STYLE OF VACATION

Some influence in terms of length of travel – e.g. to allow rest days, and companions. Otherwise, similar desires for vacation styles to those without accessibility issues.

“

I wanted to do a husky sledging trip and looked into it but unless you go as a group of disabled people, which I have no interest in whatsoever, then they won’t accommodate wheelchair users.

I love swimming and even though I’m restricted because of mobility I have bought snorkeling stuff as I’m fine in water.

I also like helicopter tours as I can see the island, as I can no long walk or hike to any scenic places. I find that a lot of activities aren’t an option for me as people *still* don’t seem to realise disabled people would like to join in.

”

Visual description:
The impact of accessibility needs across the travel experience, according to out-of-region travellers with accessibility needs in the qualitative research.

PROVIDING MORE INCLUSIVE TOURISM EXPERIENCES

There needs to be a conscious effort from industry and providers to deliver experiences that cater to those with accessibility needs, to ensure their motivations for travel are met. By incorporating accessibility needs into traveller profiles, we can address gaps in the travel experience and meet the demand and specific needs of travellers with accessibility needs and ensure the necessary adjustments to product offerings and facilities. It is also crucial that operators maximise the visibility of clear, accurate accessibility information and associated resources to help this audience research and identify the most appropriate experiences catering to their needs.

Some examples bring to life how travellers with accessibility needs may require subtly adjusted options for common components of their travel.

CREATE AN AWARENESS

Accessibility needs are prevalent and go beyond physical or visibly noticeable impairments.

Around 1 in 5 travellers are travelling with an accessibility need themselves or within their travel group. These include visual, audio or mobility considerations.

The incidence is significantly higher amongst young families, and long stay travellers.

CLOSE THE GAP OF INTENTION VS. REALITY

Travel intentions are the same with or without accessible needs, but the reality forces different experience.

Those with an accessibility need generally intend to travel in the same way and for similar reasons, except for a slight preference towards meeting new people, challenging themselves, travelling with purpose and desiring transformative experiences.

But we also see that accessibility needs have a big influence on travel: choice of destination, style of vacation, activities/experiences, accommodation and transport there/once there.

The discrepancy is in the reality of what is offered and tailored to suit those with accessibility needs.

BUILD OPTIONS

Encourage industry and providers to design experiences and opportunities that match prevalence of this market.

There must be a conscious effort from industry and providers to deliver experiences that cater to those with accessibility needs, to ensure their motivations for travel have been met.

AUSTRALIAN TOURISM CASE STUDIES THAT DELIVER THIS EXPERIENCE

Image: Global Ballooning Victoria

Those with accessibility needs are a prevalent and important segment of the out-of-region traveller market that requires a conscious effort from industry and providers to provide travel without compromise and without forcing travellers to join specialist disability tour groups.

GLOBAL BALLOONING, VICTORIA

Australia's first Easy Access Basket (EAB) was launched by Global Ballooning Australia in 2012. The basket enables passengers with physical mobility impairments to experience the joy of a hot air balloon flight along with their family and friends.

Unlike traditional balloon baskets that require passengers to climb in and out over the edge, the innovative EAB incorporates a door to allow less able-bodied individuals, including those with serious physical disabilities, to enter and exit the basket with ease. The EAB also incorporates customised seating, harness and a grab handle suspended from the burner frame.

Image: Tourism Australia

AUSTRALIA AS AN EXPERIENCE DESTINATION

Image: Tourism Australia

DESTINATION EQUITY

Australia is an attractive destination to out-of-region travellers. It is viewed as an aspirational 'dream destination' and has high levels of consideration to visit.

By comparing Australia's association with each Experience Territory against the level of interest among global out-of-region travellers, we can identify where Australia is relatively strong compared to other destinations tested, and where associations are weaker.

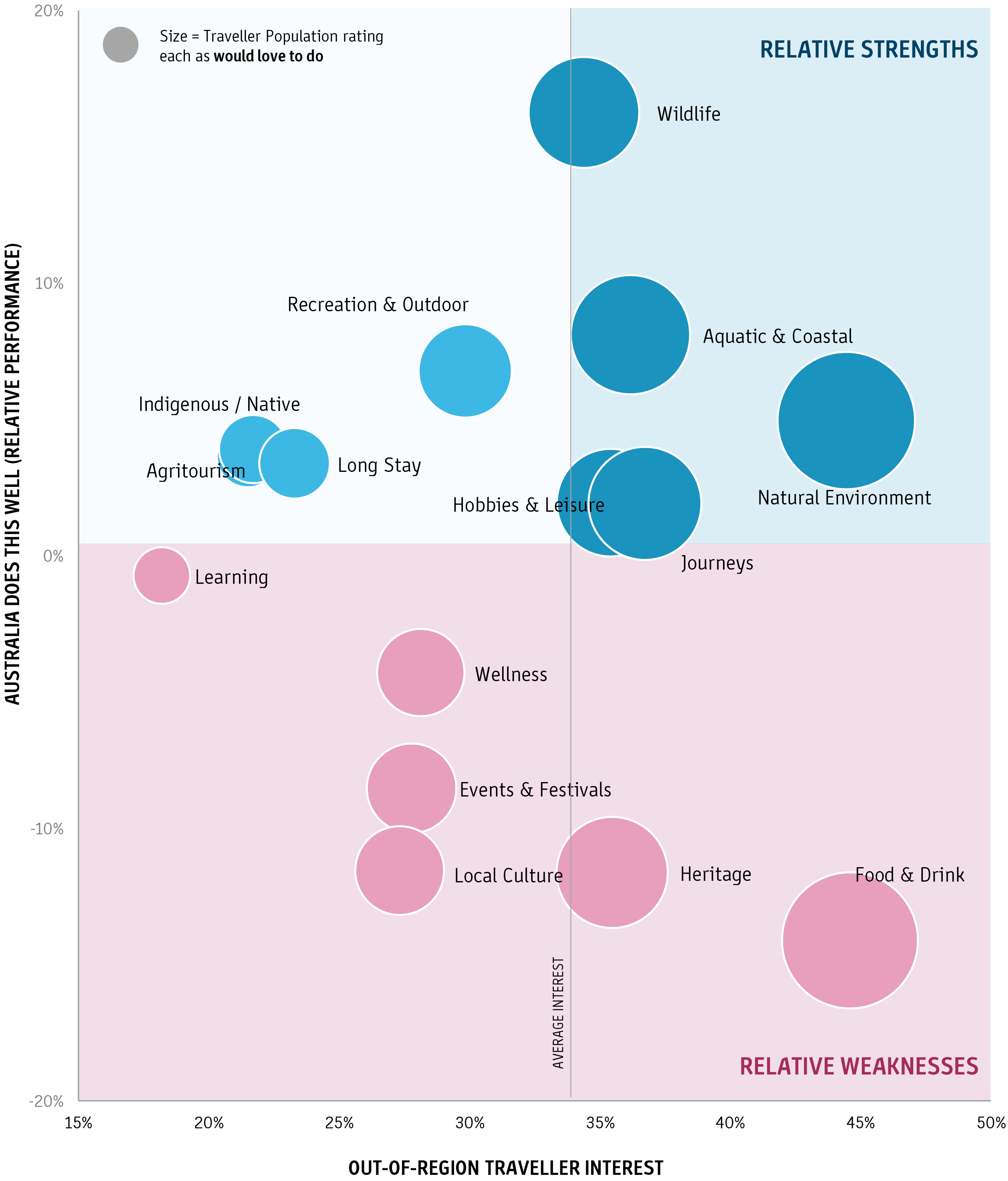
The Natural Environment is a hero experience for Australia. It attracts a lot of interest from out-of-region travellers and represents a strength for Australia compared to most other destinations. Australia has numerous landscapes and landmarks that can be leveraged, from iconic Uluru to the lesser known but highly appealing Purnululu National Park.

Another widely popular experience type is Aquatic and Coastal. This experience type is particularly appealing to several markets in Europe, the UK, and North America. Australia's 34,000 km coastline offers a huge variety of potential experiences to promote, from stunning coastal landscapes to high adrenaline water sports.

Wildlife experiences hold above-average interest among out-of-region travellers and are a key strength for Australia, given Australia's unique and varied native animals. Wildlife experiences hold particular appeal for travellers from India, the UK, France, New Zealand and Singapore.

A relative weaker area for Australia is in Food and Drink. That's not to say that Australian food and drink, cuisine or dining options are bad, but out-of-region travellers are often looking for destinations that offer distinct or authentic local cuisine options they can't easily get at home such as street food, local specialties, or multi-cultural options. Destinations such as Italy, France, Korea, and Japan all have distinct cuisines that makes them more likely to be top of mind when it comes to Food and Drink experiences. Instead, Australia is perceived to simply deliver these experiences – notably seafood, wine, and quality local produce in particular – but does not stand out on the world stage in travellers' minds, particularly when compared against European and Asian culinary hotspots.

PERFORMANCE ON EXPERIENCE TERRITORIES (STRENGTHS AND OPPORTUNITIES, VERSUS COMPETING DESTINATIONS)



Visual description:
Identifying Australia's relative strengths and weaknesses, in terms of out-of-region traveller interest in experience territories, and how well Australia is associated with each one. Relative strengths are experience territories with high interest and high association with Australia; relative weaknesses are experience territories with high interest but low association with Australia.

A SUMMARY OF AUSTRALIA'S EXPERIENCE PERFORMANCE AREAS

KEY/HERO ASSOCIATIONS

- Natural environment
- Aquatic and coastal
- Wildlife
- Journeys
- Hobbies and Leisure

ALSO OFFERS

- Recreation/Outdoor
- Long stay
- Indigenous
- Agritourism

IS NOT WELL KNOWN FOR

- Food and drink
- Heritage


Image: Tourism Australia


Image: Visit Victoria

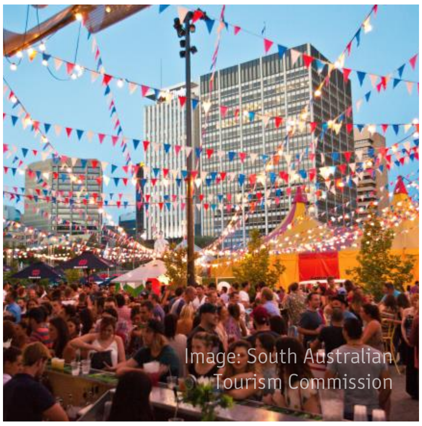


Image: South Australian Tourism Commission


Image: Tourism Australia


Image: Tourism Australia


Image: Tourism Australia


Image: Tourism Australia


Image: Tourism Australia

EXPERIENCES IN DEMAND FOR TRAVELLERS CONSIDERING AUSTRALIA

The 10 experiences shown in the table below are in high demand among the 40 million Global Travellers who would consider Australia as a destination within the next 4 years.

	Experiences in high demand (top 10) amongst travellers considering Australia as a destination	% interest	Estimated traveller population ('000s)	Global rank of experience amongst total out-of-region travellers
1ST	Dining out e.g. restaurants, street food	70%	26,792	1st
2ND	Beaches e.g. swimming, relaxing, rock pools	64%	26,046	2nd
3RD	Shopping	63%	23,298	3rd
4TH	Food & drink festivals	60%	23,158	4th
5TH	Hot springs	57%	22,362	5th
6TH	Viewing natural landmarks and wonders	55%	20,936	7th
7TH	Theme parks	55%	20,375	6th
8TH	Sites of historical or cultural significance	52%	20,715	8th
9TH	Viewing wildlife in their natural environment e.g. safari, wildlife walk	50%	19,761	17th
10TH	Architecture, notable buildings or monuments	50%	19,311	9th

Visual description:
A summary of experiences in high demand amongst those considering Australia as a destination, showing % interest in the experience and estimated traveller population (amongst travellers considering Australia), and the comparative rank of interest in this experience amongst total Global out-of-region travellers (excluding Australians).

The top 10 experiences of interest to travellers considering Australia are largely the same as those generally in demand among Global Travellers. The exception is Viewing Wildlife in their Natural Environment which features much more prominently among considerers of Australia, ranking 9th in interest level out of 89 experiences, versus 17th for the general Global Traveller pool.

All these experiences have a large potential audience, ranging from 19 million to 27 million out-of-region travellers considering visiting Australia from 19 international markets around the world.

Image: Tourism Australia

TARGET AUDIENCES IN DETAIL

Image: Tourism Australia

HIGH YIELD TRAVELLERS

High Yield Travellers are defined by above average actual, or intended, trip spend. They represent approximately 39 million travellers. A total of 6,878 High Yield Travellers participated in the research giving us an up-to-date perspective on their needs and what they are seeking.

39 MILLION
High Yield Travellers (approx).

4.5
Trips in the past five years.

1/3
Took 5 or more trips in past 5 years.

STRONG
Intent to travel next 2 years.

Note: Although this calculation of market sizing was designed to account for COVID-19 impacts, the sizing estimates are nonetheless likely to represent slight underestimates due to residual COVID-19 influence. This is particularly the case for target audience segments, where sizing was extrapolated from incidence within the general out-of-region traveller sample. The calculated estimates are also intentionally conservative to err on the side of caution during this high-risk recovery period.

WHO ARE THEY


Image: Tourism Australia

High Yield Travellers have averaged approximately 4.5 out-of-region trips in the past five years, with over one third having taken 5 or more trips in this period.

31 per cent of High Yield Travellers have travelled out-of-region in the past year and a total of 45 per cent have done so in the past two years. However, many High Yield Travellers last travelled just immediately prior to COVID-19. Their intent to travel out-of-region within the next two years is strong.

When travelling High Yield Travellers are the most likely to travel either as a couple without children or a family with children (being significantly overrepresented on both accounts).

WHAT DO THEY WANT FROM TRAVEL

When taking a vacation, High Yield Travellers seek to relax and escape the pressures of everyday life, to have fun and enjoy themselves, to explore new destinations, to learn and experience new things and to reconnect or spend quality time with family and friends. These needs are all exhibited to a much higher extent among High Yield Travellers than among the general out-of-region traveller market. In addition, they place emphasis on immersing themselves in a different culture and indulging and pampering themselves.

High Yield Travellers would particularly "love to do" experiences related specifically to food and drink, the natural environment, in-destination journeys, aquatic and coastal activities, heritage and wildlife encounters. They want to sightsee, engage in the history of the destination, explore food and drink offerings, explore the local culture, wildlife and the region. They display greater interest than other traveller types in exploring the natural environment, engaging in wellness experiences, seeing unique phenomena and agritourism.

Immersion is everything: After 2 years+ being unable to travel, High Yield Travellers want to make the most of their travel experiences like never before. Pent up demand is driving a powerful yearning to immerse in the experience with all senses, for example why just walk in the woods when you can stay overnight in a tree hut for true 3D jungle immersion?

The unique flavour of a destination needs to shine through - enjoying any experience in the moment is important, but not enough. Like any travel experience, a local angle is critical to scratch the itch to do what you can't do at home, for example, massage is lovely, but an Ayurvedic massage in India or a Thai massage in Thailand is an unforgettable travel experience. For Australia, this presents opportunities to leverage unique native ingredients or weave in an Indigenous element that is distinctively Australian.

OPPORTUNITIES AROUND SPECIFIC EXPERIENCES

Image: Tourism Australia

Three in five High Yield Travellers believe that sustainability practices when they travel are important however this is not a key emphasis for them and much of their behaviours in support of sustainable tourism is to engage in practices that are free or incorporated easily. Over 70 per cent of High Yield Travellers consider it important to respect and preserve the cultural heritage of a destination and want to protect the natural environment they are visiting and support ethical treatment of animals and wildlife. However, less than half consider offsetting their travel or participating in eco-friendly travel or experiences important. High Yield Travellers are less willing to pay for sustainable experiences. Their main concerns about sustainable tourism relate to the added cost and a perception that there is a lack of options available to travel in this way more often.

Image: Tourism Australia

High Yield Travellers are a segment more willing to pay a little or a lot more for Indigenous experiences. This relates to their need to immerse in the experience of their travel. They recognise the greatest value-added potential of Indigenous experiences in the wildlife, wellness, aquatic and coastal space. However, promotion of Indigenous experiences also needs to recognise and allay High Yield Travellers' potential concerns - being unsafe, being exploitive or disrespectful and the potential cost.

A key learning from this research is that for High Yield Travellers it is about learn, don't lecture. There is an unmistakable pleasure in learning more about the culture of the destination but not if it feels like school or work. Interactive, hands on and physically active guided experiences create the opportunity to learn without a lecture. Short and easy is key to achieving this, for example, offering wine pairing is more appealing than a sommelier class or embedded sustainability values are more appealing than specifically seeking to rehabilitate a wildlife habitat.

Image: Tourism Australia

LUXURY TRAVELLERS

Luxury Travellers are defined by their actual or intended spend per night per person being above AU $1,000 or local market equivalent. They represent 4 per cent of the out-of-region market equating to approximately 7 million travellers. A total of 1,127 Luxury Travellers participated in the research giving us an up-to-date perspective on their needs and what they are seeking.

7 MILLION	5.1	1/3	VERY HIGH
Luxury Travellers (approx).	Trips in the past five years.	Took 5 or more trips in past 5 years.	Intent to travel next 2 years.

Note: Although this calculation of market sizing was designed to account for COVID-19 impacts, the sizing estimates are nonetheless likely to represent slight underestimates due to residual COVID-19 influence. This is particularly the case for target audience segments, where sizing was extrapolated from incidence within the general out-of-region traveller sample. The calculated estimates are also intentionally conservative to err on the side of caution during this high-risk recovery period.

WHO ARE THEY

Luxury Travellers have averaged approximately 5.1 trips in the past five years with over one third having taken 5 or more trips in this time period. This makes them a segment that not only spends more when they travel but they travel more frequently than most other traveller types.

38 per cent of global Luxury Travellers have travelled out of their region in the past year and a total of 53 per cent have done so in the past two years despite COVID-19 impacts. They have a very high intent to travel out-of-region in the next two years.

Luxury Travellers are more likely to be travelling as a family with dependent children (32 per cent of Luxury Travellers) or travelling with adult children leading to higher overall trip expenditure. If not travelling with family, they are likely to be travelling as a couple or with friends.

WHAT DO THEY WANT FROM TRAVEL

Their vacation needs are similar to other segments with a priority on relaxing and escaping the pressures of everyday life and having fun and enjoyment. Other prominent needs that are unique for Luxury Travellers are to reconnect and spend quality time with family and friends, to learn and experience new things about the world and to feel secure and comfortable when doing so.

Image: Baillies Longitude 131

Luxury Travellers would "love to do" experiences related specifically to food and drink, the natural environment, in-destination journeys, aquatic and coastal, heritage and hobby and leisure activities. They want to sightsee, enjoy food and drink, understand historical aspects of the destination and explore the local culture. Compared to other travellers, Luxury Travellers display a greater interest in wildlife and land-based experiences, doing further in-destination travel (cruises, rail, coach tours, scenic flights), having wellness experiences and eco/nature based/agritourism experiences.

Rather than just seeking immersive experiences, it is the richness and depth of the experience that is also important. This depth could be from deeper understandings (e.g. history), alignment of values (e.g. sustainability) and personal enhancement (e.g. wellness, hobbies).

OPPORTUNITIES AROUND SPECIFIC EXPERIENCES

Image: Tourism Australia

Luxury Travellers are a key opportunity for sustainable tourism due to both the degree of importance placed on sustainable tourism behaviours and this segment's propensity to pay for sustainable tourism components. 70 per cent of Luxury Travellers consider sustainable tourism practices important compared to 61 per cent of out-of-region travellers and this type of travel brings additional enjoyment and personal satisfaction to them.

They place high importance on their travel behaviour aligning to sustainable values of respecting and not damaging the natural or cultural aspects of a destination, as well as actively choosing sustainable tourism options. Over 60 per cent of Luxury Travellers consider it important to support local businesses, use sustainable transportation options, stay in eco-friendly accommodation, and offset travel carbon emissions. In contrast to High Yield Travellers, Luxury Travellers are much more willing to pay a little or a lot more for experiences that are sustainably aligned compared to a similar non-sustainable option.

Image: Baillies Longitude 131

Luxury Travellers are also a segment more inclined to attach value to Indigenous experiences. There is greater interest in paying for Indigenous experiences in the wildlife, wellness, aquatic and coastal, long stay, recreation and outdoor and events and festivals contexts. Their main concerns relate to potentially being unsafe, exploitative or disrespectful and the potential cost.

LONG STAY TRAVELLERS

Long Stay Travellers are defined by actual or intended trip lengths of more than 30 days. They represent 4 per cent of the out-of-region market which is approximately 4 million travellers. A total of 1,127 Long Stay Travellers participated in the research giving us an up-to-date perspective on their needs and what they are seeking.

4 MILLION
Long Stay Travellers (approx).

5.4
Trips in the past five years.

1/3
Took 5 or more trips in past 5 years.

HIGHEST
Intent to travel next 2 years.

Note: Although this calculation of market sizing was designed to account for COVID-19 impacts, the sizing estimates are nonetheless likely to represent slight underestimates due to residual COVID-19 influence. This is particularly the case for target audience segments, where sizing was extrapolated from incidence within the general out-of-region traveller sample. The calculated estimates are also intentionally conservative to err on the side of caution during this high-risk recovery period.

WHO ARE THEY


Image: Tourism Australia

Long Stay Travellers have averaged approximately 5.4 trips in the past five years with over one third taking 5 or more trips in this period. They have the highest frequency of travel in addition to the lengthiest stay. This combination makes them a segment worthy of understanding despite their relatively low incidence amongst travellers.

One third of Long Stay Travellers have travelled out-of-region in the past year and in total 48 per cent have done so in the past two years despite COVID-19 impacts. Their intent to travel out-of-region in the next two years is strong.

One third of Long Stay Travellers travel alone and this is closely followed by travelling with friends and as a couple. Although this segment is generally less likely to travel with dependent children this does occur in about 1 in 5 cases and they also may be likely to travel with their parents, with their adult children and extended family. However, Long Stay Travellers are more likely to have to consider accessibility needs with 39 per cent indicating mobility, visual or cognitive restrictions (compared to 24 per cent of all out-of-region travellers).

WHAT DO THEY WANT FROM TRAVEL

Long Stay Travellers have similar vacation needs to travellers in general: to relax and escape, to have fun and enjoy themselves. However, Long Stay Travellers have a few more unique needs related to their travel including wanting to embrace a sense of adventure, to discover off-the-beaten track, to meet new people or to make new friends, and to engage in specific activities, hobbies and passions personal to them. They have a much higher interest in engaging in a wide variety of different experiences when visiting a destination. This ranges from experiencing the natural environment, to food and drink, to volunteering, agritourism and learning experiences.

Long Stay Travellers want to sightsee and explore a destination fully, have wildlife interactions, participate in both land-based activities such as rock sports, snow sports, off-roading, and water-based activities such as scuba diving, snorkelling and surfing. They also have a greater interest in comfort camping options such as glamping or campervanning.

These travellers display a greater interest in living like a local and dual-purpose travel, for example they are very interested in volunteering, language immersion, workcation, religious travel and ancestry travel.

OPPORTUNITIES AROUND SPECIFIC EXPERIENCES

Image: Tourism Australia

Approximately two thirds of Long Stay Travellers place importance on sustainable tourism. They are a segment that is willing to engage more actively in choosing sustainable tourism options – 60 per cent consider it important to use eco-friendly or sustainable transport to get around and 55 per cent consider it important to participate in active conservation or rehabilitation programs.


Image: Tourism Australia

In alignment with their desire to immerse themselves locally, their willingness to pay for sustainable tourism options are more pronounced when tapping into social impacts, such as participating in experiences that respect cultural practices or customs or those that support local businesses.

Long Stay Travellers are less willing to pay more for Indigenous experiences despite their desire to be immersed. This could be due to needing to fund a lengthier travel period. Other concerns that arise among this type of traveller include the perception that it is hard to find destinations that offer such Indigenous experiences, or they don't know how to identify whether travel operators offer an Indigenous experience. They also have concerns about the Indigneous experience being of potentially lower quality. Long Stay Travellers their relationship and interest in Indigenous experiences is likely to be driven by sustainability and local cultural nuances and appeal.

Image: Tourism Australia

WORKING HOLIDAY MAKERS

Working Holiday Makers are defined as being under 36 years of age, who are considering or planning to take a working holiday abroad. They represent more than 7 million potential travellers. A total of 2,017 Working Holiday Makers participated in the research giving us an up-to-date perspective on their needs and what they are seeking.

7 MILLION

Working Holiday Makers (approx).

4.4

Trips in the past five years.

30%

Took 5 or more trips in past 5 years.

VERY HIGH

Intent to travel next 2 years.

Note: Although this calculation of market sizing was designed to account for COVID-19 impacts, the sizing estimates are nonetheless likely to represent slight underestimates due to residual COVID-19 influence. This is particularly the case for target audience segments, where sizing was extrapolated from incidence within the general out-of-region traveller sample. The calculated estimates are also intentionally conservative to err on the side of caution during this high-risk recovery period.

WHO ARE THEY

Working Holiday Makers have averaged approximately 4.4 trips in the past five years with 30 per cent taking 5 or more trips in this time period.

38 per cent of prospective Working Holiday Makers have travelled out of their region in the past year and a total of 58 per cent have done so in the past two years despite COVID-19 impacts. They have a very high intent to travel out-of-region in the next two years.

Working Holiday Makers are most likely to travel solo, with friends or as a couple. They are more likely to have to consider accessibility needs with 37 per cent indicating mobility, visual or cognitive restrictions (compared to 24 per cent of all out-of-region travellers).

WHAT DO THEY WANT FROM TRAVEL

Working Holiday Makers have similar vacation needs to out-of-region travellers in general: to relax and escape, to have fun and enjoy themselves. However, they display a few more unique needs related to their travel including embracing a sense of adventure, focusing on mental/physical health and wellbeing, engaging in specific hobbies, activities, or passions, meeting new people and discovering places off-the-beaten track.

Image: Tourism Australia

Working Holiday Makers have a much higher interest in engaging in a wide variety of different experiences when visiting a destination ranging from food and drink, natural environment, to agritourism and learning experiences.

Food and drink experiences and engaging with local culture are particularly important for Working Holiday Makers as well as dual-purpose travel e.g. workcation, volunteering, language immersion, learning new skills.

OPPORTUNITIES AROUND SPECIFIC EXPERIENCES

Image: Tourism and Events QLD

Sustainable tourism is a key theme for Working Holiday Makers and they are generally willing to pay a little or a lot more for a sustainable option in contrast to a similar non-sustainable option. Engaging in sustainable tourism is personally rewarding, brings them enjoyment and aligns to their day-to-day life. They place particular importance on active conservation when they travel and 70 per cent of them consider the adoption of sustainable practices during their travel to be important. In addition to respecting and preserving local environments, more than 60 per cent consider it important to use eco-friendly or sustainable transport to get around, to stay in eco-friendly accommodation, or to offset travel emissions. 65 per cent of Working Holiday Makers consider it important to participate in active conservation or rehabilitation programs compared to 50 per cent of all out-of-region travellers.


Image: Tourism Australia

The Working Holiday Maker cohort also contain individuals for whom sustainable tourism is less important. SomeWorking Holiday Makers are concerned about the perceived cost of sustainable tourism, lack of authenticity, level of effort required, and having it detracting from their travel. Caution should be taken not to assume all Working Holiday Makers will also be active sustainability seekers. This segment is all about dual-purpose travel. Sustainability can be incorporated in a meaningful and non-competing manner.

Working Holiday Makers are also very likely to be willing to pay more for experiences in an Indigenous setting – aligning with their need for dual-purposes in their travel and to discover new and unique experiences and meaningful travel. Of greatest appeal are Indigenous experiences in aquatic/coastal, food and drink, and long stay contexts.

Image: Tourism Australia

MARKET

DEEP DIVE

Image: Tourism Australia

Image: Tourism Australia

MARKET SUMMARY
AUSTRALIA

Alongside the 19 international markets included in the survey scope, Australian out-of-region travellers were also surveyed to gauge what they are looking for when it comes to travel and experiences.

TRAVELLER PROFILES:

Australian out-of-region travellers are spending their vacations with a mix of companions, more often travelling as a couple without children, and less often with friends, parents, extended family or as a family with adult children compared to the Global average. At a state level, residents of NSW are the most well-travelled with an average of 3.3 trips in the last 5 years, with 1 in 5 having taken more than 5 trips.

TRAVELLER NEEDS:

Australian out-of-region travellers are especially looking forward to having fun and enjoying themselves and a sense of adventure (compared to Global), as well as escaping everyday pressures. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Australian out-of-region travellers are most often travelling for Exploration, Reconnection and Adventure (especially Exploration and Adventure for Working Holiday Makers). Western Australians in particular skew to Reconnection needs while Queenslanders are more likely than average to seek Exploration.

EXPERIENCE TERRITORIES:

There is high interest in the natural environment, food and drink, wildlife, heritage and aquatic and coastal experiences. Natural environment experiences include viewing natural landmarks and exploring wilderness/nature. Food and drink includes wine/beer tasting tours and winery stays (which is higher than the Global average), as well as wine/beer pairings, street food and casual or mid-range dining. Wildlife includes viewing wildlife in their natural habitat and swimming with marine animals (both are higher than the Global average), as well as marine life watching and up-close encounters. Heritage includes sites of historical or cultural significance, museums/galleries, ancient ruins, or notable buildings/monuments. Aquatic and coastal includes beaches, snorkelling, and paddle sports. Appeal of experience territories is consistent across states with no significant differences.

Australian out-of-region travellers most strongly associate New Zealand, Canada and Switzerland with natural environment experiences, the territory that holds most appeal. Food and drink is perceived to be strongest for Japan, Italy, France and Singapore while Wildlife is very strongly associated with South Africa followed by New Zealand and Canada.

TRAVELLER NEEDS - SUSTAINABILITY:

Australian out-of-region travellers place most importance on sustainable tourism practices that include the ethical treatment of animals, protection of land/natural environment, respecting cultural heritage and practices, and the ethical treatment of local people; with young families being most likely to be interested in and willing to pay for sustainable practices. Australian travellers believe that sustainable tourism is the right and moral thing to do, and want to preserve experiences for future generations, but cost and limited knowledge of options prevent travellers from shaping travel around sustainability or engaging in sustainable tourism practices.

"It isn't that sustainability isn't important, it's just that there are so many factors that impact tourism I feel that only trying to undertake environmentally sustainable activities would mean missing some incredible experiences. I guess I do look at what sustainable processes/products are used which would/do draw me to that company/provider"

"Minimising environmental impact is always important in everything we do. Travel no less. We should see the world and explore other cultures but not at the cost of destroying our environment and ecosystem which could eventually lead to the destruction of those places."

"I like to think I live a sustainable life so when it comes to travel I try to think about what I would enjoy most in my precious leave time and therefore don't factor this in as much as other factors. However, when I am on holiday I do make sustainable choices such as re-using towels, not wasting water and respecting the local culture and community."

EXPERIENCE WITH AN INDIGENOUS LENS:

51 per cent of Australian out-of-region travellers are interested in Indigenous experiences overall (18 per cent really want to do it, which is lower compared to the Global average). There is some interest in experiences with Indigenous people or in Indigenous settings that focus on learning, but interest in engaging in and paying extra for travel experiences in an Indigenous setting or with Indigenous people is lower among Australian out-of-region travellers than travellers globally. Exploitation and lack of authenticity are the biggest barriers.

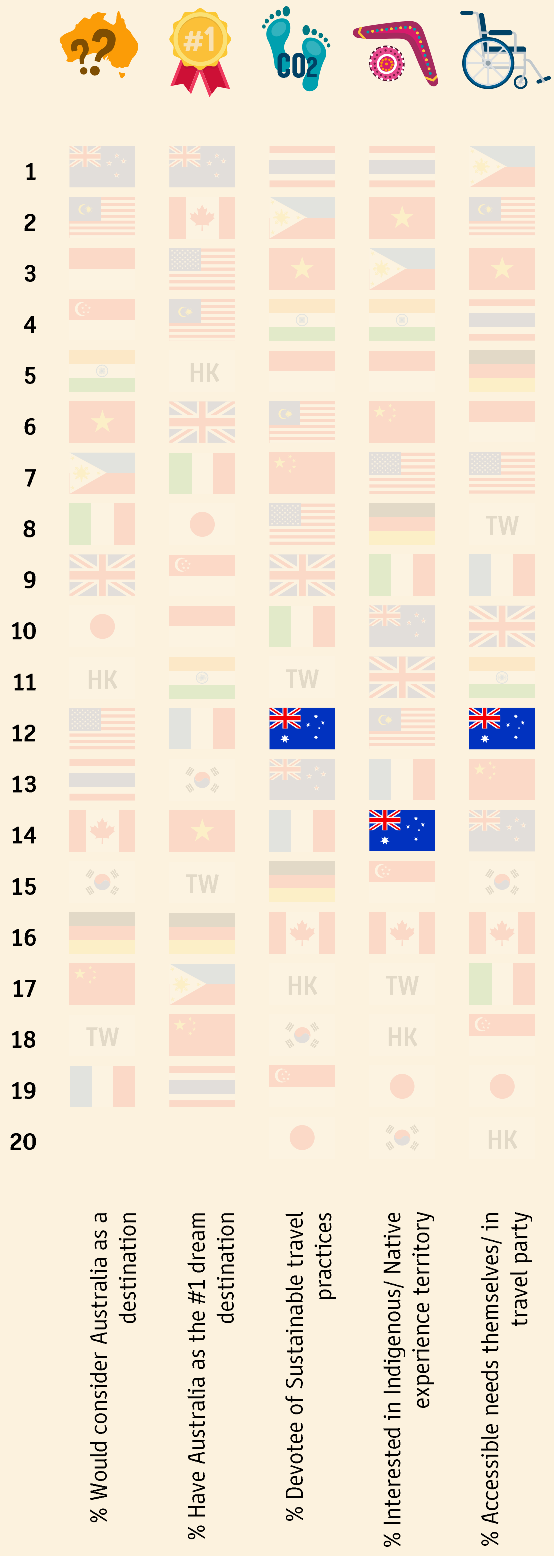
"I have seen a YouTube video of Urban exploration with a Melbourne Elder and it was absolutely amazing to draw the parallels that we use the places for the same things (e.g. the video was about Melbourne's Southbank area how we use it now for socialising, eating etc and that is exactly what it was used for before. They also showed artist impressions of the area before it was colonised."

"I love to talk with native people, so guided tour is a chance to ask them , discuss their heritage. All the countries with rich Indigenous heritage should come forward with more accessible tour packages. I would love to do it in Australia, especially in Northern Territory, because I know how rich their culture is but all the current holiday packages do not include them"

"I enjoy craft activities and I find Aboriginal dot painting of particular interest, this is why I'd love this experience. I'd also like to learn about other crafts - basket making would be one. If this experience enabled me to chose from a particular set of painting/craft, then that would make it better for me as I could choose the components."

TRAVELLER NEEDS - ACCESSIBILITY:

Accessibility needs impact 1 in 5 out-of-region travellers, especially in the choice of destination, activities or experiences. Australian out-of-region travellers with accessibility needs are more likely to seek Transformation, Adventure and time for their Passions as well as seeking out experiences involving Travel+ (dual-purpose travel), Indigenous settings and Personal Journey.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY USA

EXPERIENCE TERRITORIES:

There is high interest from USA out-of-region travellers in natural environment, aquatic and coastal and food and drink experience territories. Wildlife as an experience territory is also in demand, more so than at the Global average level. Natural environment includes viewing natural landmarks and exploring wilderness/nature. Aquatic and coastal includes beaches, snorkelling and water sports (with more interest compared to Global). Food and drink includes wine/beer tasting tours or food pairings, winery stays, street food, local specialities, fresh seafood and casual or mid-range dining. Wildlife includes viewing wildlife in their natural environment, marine life watching or swimming (with more interest compared to the Global average).

TRAVELLER PROFILES:

USA out-of-region travellers are spending their vacations with a mix of companions, more often travelling as a couple without children compared to the Global average.

TRAVELLER NEEDS:

USA out-of-region travellers particularly look forward to having fun, exploring new destinations and experiencing a sense of adventure through travel again (compared with the Global average), along with relaxing and escaping the pressures of everyday life. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), USA out-of-region travellers are most often travelling for Adventure (with demand higher than the Global average, especially for Luxury Travellers and Long Stay Travellers, who make up 5 per cent and 4 per cent of the total USA out-of-region traveller market, respectively), with Exploration and Reconnection also common.

TRAVELLER NEEDS - SUSTAINABILITY:

USA out-of-region travellers place most importance on sustainable tourism practices that include the ethical treatment of local people, animals, wildlife, and respecting cultural heritage and practices. Young families are the most likely to be interested in and willing to pay for sustainable practices. USA travellers agree that sustainable tourism is the right and moral thing to do, but they are less likely to appreciate benefit for themselves or others (feel better, personal joy, enjoyment for future generations) compared to the Global average. It does not shape travel choices for most. Greater availability (and visibility) of affordable options are important for USA travellers.

EXPERIENCE WITH AN INDIGENOUS LENS:

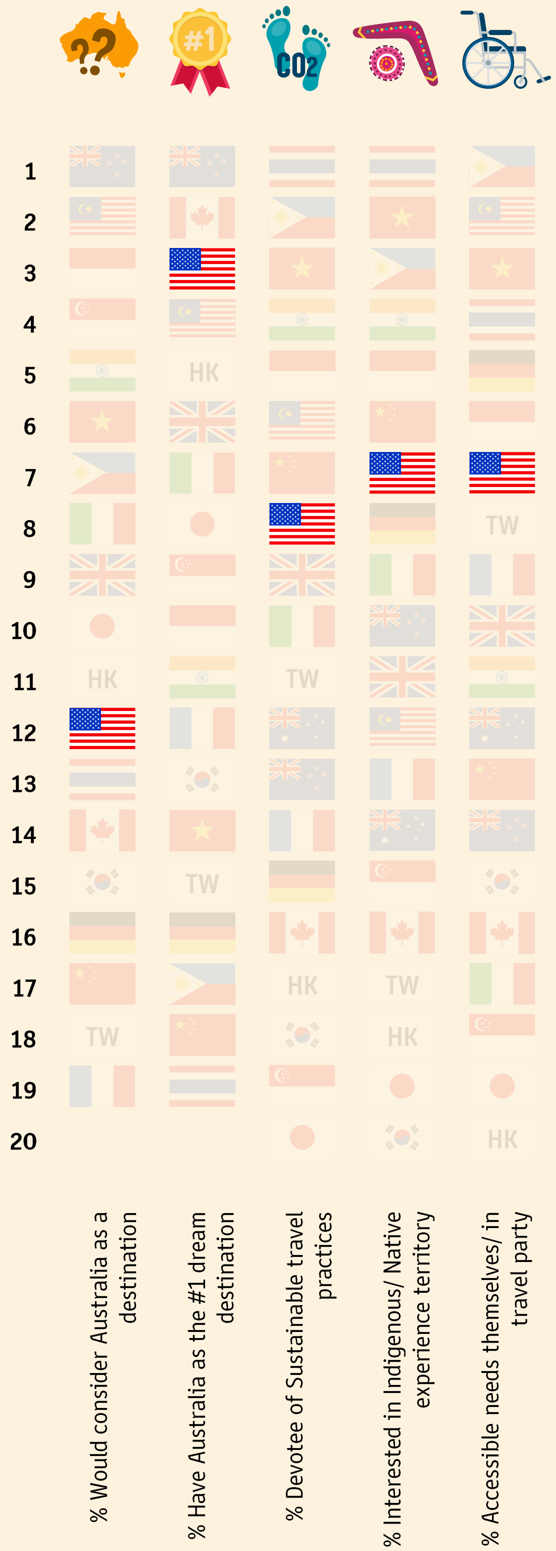
60 per cent USA out-of-region travellers are interested in Indigenous experiences overall (25 per cent want to do it, which is higher compared to the Global average). Wildlife, agritourism and learning experiences with Indigenous people or in Indigenous settings present interesting opportunities for USA travellers. However, education and myth-busting is needed to drive interest.

TRAVELLER NEEDS – ACCESSIBILITY:

Accessibility needs impact 1 in 4 USA out-of-region travellers, especially in the choice of destination and experiences. USA out-of-region travellers with accessibility needs are more likely to desire adventure and transformation from their travel than travellers without accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 1 in 3 out-of-region travellers from the USA; 5 per cent have Australia as their #1 dream destination (behind Hawaii, Caribbean, Canada, Japan, and Italy). Australia is strongly associated with wildlife (rank 2nd) and natural environment experiences (rank 3rd), but in-region destinations (Caribbean, Hawaii) are big competitors for these experiences, along with aquatic and coastal experiences. Food and drink experiences are less strongly associated with Australia (rank 21st). Australia's associations with wildlife and agritourism fare well as Indigenous experience opportunity areas and is moderately associated with Indigenous experiences as a destination overall (on par with New Zealand in 5th rank, behind South Africa, Indonesia, and Mexico).



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY UK

TRAVELLER PROFILES:

UK out-of-region travellers are spending their vacations with a mix of companions, more often travelling as a couple without children compared to the Global average.

TRAVELLER NEEDS:

UK out-of-region travellers mainly look forward to having fun, relaxing, and escaping pressures of everyday life through travel again (compared to the Global average), as well as exploring new destinations. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), UK out-of-region travellers are most often travelling for Reconnection, Exploration and Adventure (with higher demand for these typologies than the Global average, especially for High Yield Travellers, Long Stay Travellers, and Working Holiday Makers, who make up 25 per cent, 4 per cent and 5 per cent of the total UK out-of-region traveller market respectively.

EXPERIENCE TERRITORIES:

There is high interest from UK out-of-region travellers in the natural environment, wildlife, aquatic and coastal and food and drink experience territories. Natural environment includes viewing natural landmarks and exploring wilderness/nature. Wildlife includes viewing wildlife in their natural environment, marine life watching or swimming (with more interest for these experiences compared with the Global average) and up-close animal encounters. Aquatic and coastal includes beaches, snorkelling and water sports. Food and drink includes street food, casual or mid-range dining, Indigenous food experiences and wine/beer tasting tours.

TRAVELLER NEEDS - SUSTAINABILITY:

UK out-of-region travellers place most importance on sustainable tourism practices that include the ethical treatment of animals and wildlife, respecting cultural practices and heritage and protecting, not damaging, the land or natural environment. Young families are the most likely to be interested in and willing to pay for sustainable practices. UK travellers acknowledge that sustainability is important – it is the right and moral thing to do – and believe it should be incorporated in travel (as they do at home in daily life), but opportunity barriers prevent it from it being a common practice. Greater availability (and visibility) of affordable options will be important for UK travellers.

EXPERIENCE WITH AN INDIGENOUS LENS:

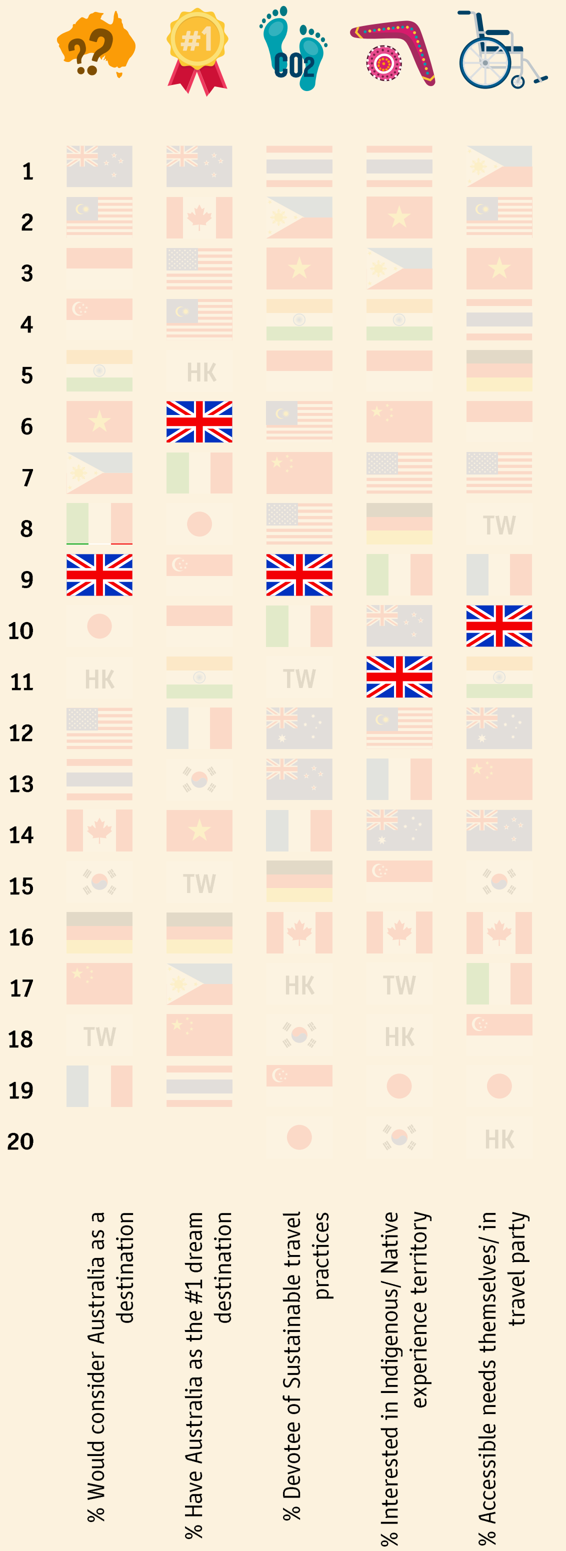
55 per cent of UK out-of-region travellers are interested in Indigenous experiences overall (22 per cent want to do it). Learning is a major objective for UK travellers in seeking experiences in an Indigenous setting or with Indigenous people. Wildlife experiences are also interesting to some. However, there is concern about the risk of exploitation and tokenism as well as the potential for additional cost or the experience being unsafe. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

Accessibility needs impact 1 in 4 UK out-of-region travellers, especially in the choice of experiences and accommodation. UK out-of-region travellers with accessibility needs are more likely to desire Adventure and Transformation from their travel than travellers without accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 1 in 3 out-of-region travellers from the UK and 5 per cent have Australia as their #1 dream destination (behind the USA, Canada, Caribbean, Hawaii, and Japan). Australia is strongly associated with aquatic and coastal (rank 2nd), wildlife (rank 2nd) and nature experiences (rank 4th) and is a top 3 destination associated with hobbies and leisure, long stay, recreation and outdoor, journeys and Indigenous experiences. The combination of Australia's strong association as a destination offering wildlife experiences and Indigenous experiences, and the interest in wildlife experiences in an Indigenous setting or with Indigenous people presents a good opportunity for UK out-of-region travellers. New Zealand is a key competitor across most strength areas for Australia, including Indigenous.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY CHINA

TRAVELLER PROFILES:

Chinese out-of-region travellers are spending their vacations with a mix of companions, more often travelling as a couple without children compared to the Global average.

TRAVELLER NEEDS:

Chinese out-of-region travellers mainly look forward to getting in touch with nature, learning and experiencing new things, and immersing themselves in a different culture and way of life (compared with the Global average), as well as relaxing and escaping pressures of everyday life and reconnecting with others. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Chinese out-of-region travellers are most often travelling for Transformation and to get Into Nature. This is higher demand than the Global average, especially for High Yield and Luxury Travellers.

EXPERIENCE TERRITORIES:

There is high interest from Chinese out-of-region travellers in food and drink, natural environment, aquatic and coastal (compared with the Global average) and journey experience territories. Food and drink includes unique or local cuisines, tasting trails, wine/beer pairings with food or tasting tours, and Indigenous food experiences. Natural environment includes viewing natural landmarks and exploring wilderness/nature. Aquatic and coastal includes beaches, surfing (which are of greater interest compared with the Global average) and water sports. Journey includes cruising, campervan, and walking tour experiences.

TRAVELLER NEEDS - SUSTAINABILITY:

Chinese out-of-region travellers place high importance on a range of sustainable tourism practices, compared to the Global average, with respect, preservation and protection of cultural heritage and natural environment and cultural practices the most important. Young families are the most likely to be interested in and willing to pay for sustainable practices. Chinese travellers see the potential personal benefits of sustainable tourism – these experiences can be enjoyable, bring personal joy and make them feel better about the vacation – but cost is a barrier, with Chinese out-of-region travellers less willing to pay more for sustainable options compared to the Global average.

EXPERIENCE WITH AN INDIGENOUS LENS:

65 per cent Chinese out-of-region travellers are interested in Indigenous experiences overall (which is higher compared with the Global average), with 24 per cent saying they really want to do it. Wellness and food and drink are experiences Chinese out-of-region travellers are interested in doing in

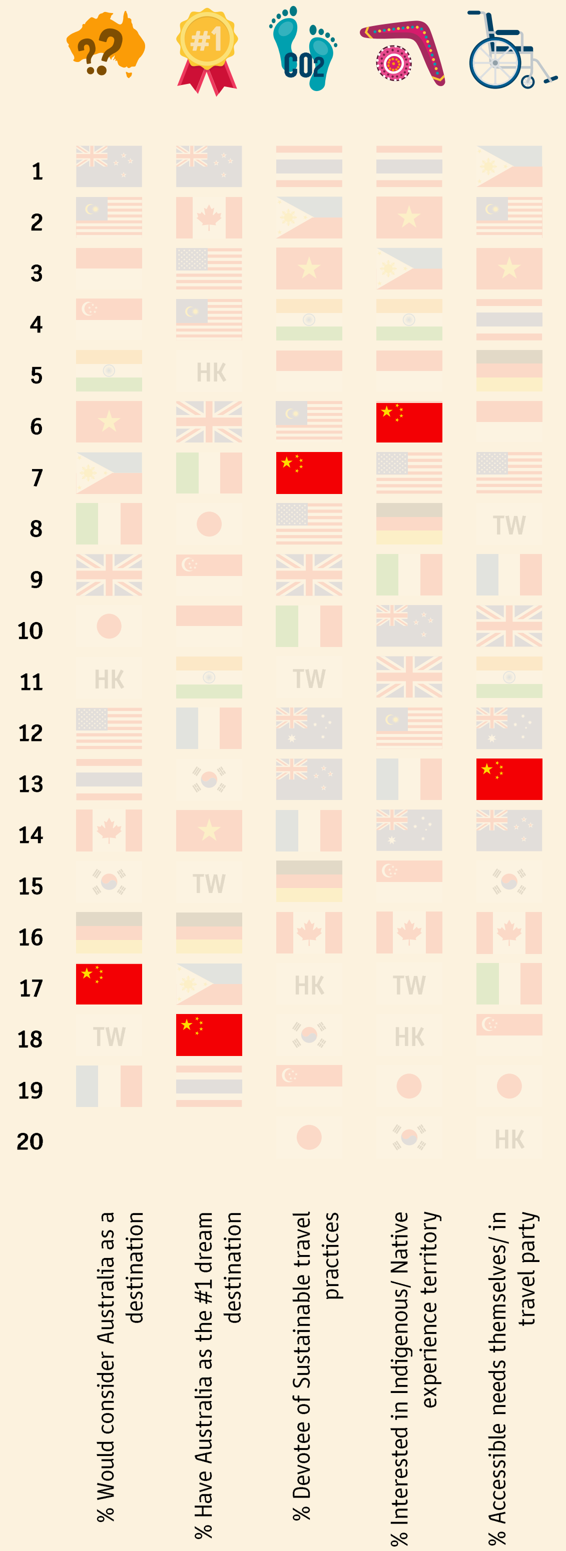
Indigenous settings or with Indigenous people (which is higher compared with the Global average), aquatic and coastal and wildlife are also of interest, but concerns about safety, comfort and offence are barriers to engagement. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

Accessibility needs impact 1 in 5 Chinese out-of-region travellers. Most find that this has a big or some influence on many aspects of travel. Chinese out-of-region travellers with accessibility needs are more likely to desire Reconnection from their travel than travellers without accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 1 in 4 out-of-region travellers from China but only 2 per cent have Australia as their #1 dream destination. Australia is strongly associated with wildlife (rank 1st) and agritourism experiences (rank 2nd), but is less associated with other experience territories, especially those driving destination consideration (food and drink (rank 24th), natural environment (rank 9th), aquatic and coastal (rank 5th) and journey (rank 17th), or those that present opportunities for specific Indigenous experiences (wellness, rank 21st). Note that China's current COVID-19 travel restrictions at the time of publication limit the opportunity for Australia in the immediate term; China remains a 'watch' market for Tourism Australia to resume activity upon reopening.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY

INDIA

TRAVELLER PROFILES:

Indian out-of-region travellers spend their vacations with a mix of companions, travelling more often with friends or family with adult children.

TRAVELLER NEEDS:

Indian out-of-region travellers look forward to getting in touch with nature and experiencing new things around the world (compared with the Global average), as well as relaxing and having fun. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Indian out-of-region travellers are most often travelling for Adventure and Into Nature (which is of higher demand than the Global average), with Reconnection also common, especially for Luxury Travellers who make up 7 per cent of the total Indian out-of-region traveller market.

EXPERIENCE TERRITORIES:

There is high interest from Indian out-of-region travellers across a range of experience territories, with highest demand for natural environment experiences. Natural environment includes viewing natural landmarks, exploring wilderness/nature and seasonal natural events. In meeting their need for Adventure, Indian out-of-region travellers are interested in a range of water-based, land-based and exploration experiences.

TRAVELLER NEEDS - SUSTAINABILITY:

Indian out-of-region travellers place high importance on a range of sustainable tourism practices compared with the Global average. Protection, respect and preservation of the land and the cultural heritage and ethical treatment of animals are of most importance. Young families are most likely to be interested in and willing to pay for sustainable practices. Indian out-of-region travellers see the personal benefits of sustainable tourism – it is viewed as bringing personal joy and making them feel better about their vacation – as well as preserving culture and wildlife for future generations (with many motivators stronger than for Global travellers). Selection of sustainability experiences can be impacted by the relatively limited number of options, additional costs and effort and the lack of trust or authenticity in providers offering these experiences.

EXPERIENCE WITH AN INDIGENOUS LENS:

74 per cent of Indian out-of-region travellers are interested in Indigenous experiences overall (38 per cent really want to do it, which is higher compared to the Global average). A number of experience territories present interesting opportunities for Indian travellers, especially related to the natural environment. Concerns about safety, cost and the ability to find such experiences are

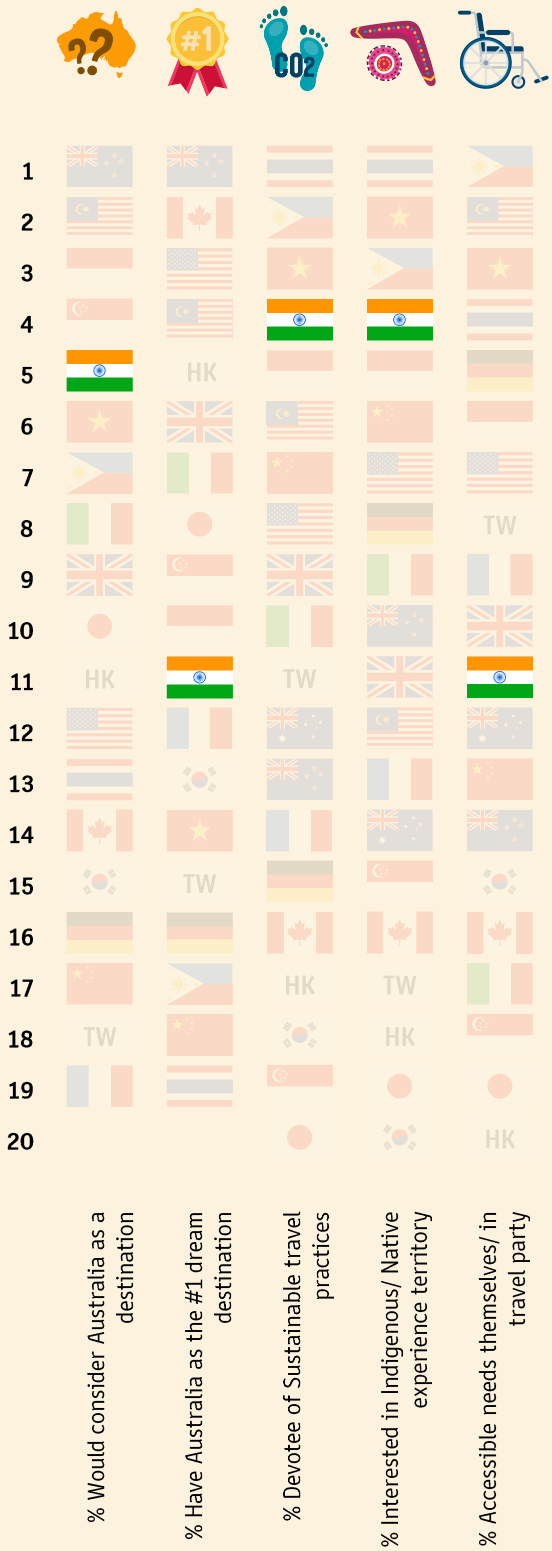
barriers to engagement. Offering guided experiences could relieve some of these concerns about safety.

TRAVELLER NEEDS - ACCESSIBILITY:

Accessibility needs impact 2 in 5 Indian travellers, over-indexing on all needs and with a considerably bigger impact on and across the travel experience compared with the Global average. Transformation, Adventure, and time for their Passions is important for these travellers.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 19 per cent out-of-region travellers from India; and is a top 5 dream destination for 30 per cent but only 3 per cent have Australia as their #1 dream destination. Australia is strongly associated with wildlife (rank 2nd) and aquatic and coastal (rank 3rd) but is less well associated with experience territories beyond these two, including natural environment (rank 9th) and Indigenous (rank 15th).



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY SINGAPORE

EXPERIENCE TERRITORIES:

There's high interest from Singapore out-of-region travellers in food & drink and natural environment experience territories. Food & drink includes street food (more interest compared to Global), unique or local specialties, fresh seafood and Indigenous dining or food experiences. Natural environment includes viewing natural landmarks, exploring wilderness/nature, aurora exploration and seasonal natural events.

TRAVELLER PROFILES:

Singapore out-of-region travellers are vacationing with a mix of companions, but more with friends, parents or as a family with adult children.

TRAVELLER NEEDS:

Singapore out-of-region travellers are looking forward to relaxing and escaping the pressures of everyday life, having fun, and enjoying themselves and exploring new destinations. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Singapore out-of-region travellers travel predominantly for Exploration and Reconnection (this is higher than the Global average especially for High Yield Travellers, who make up 38 per cent of the total Singapore out-of-region traveller market).

TRAVELLER NEEDS - SUSTAINABILITY:

Singapore out-of-region travellers place most importance on sustainable tourism practices that include protection of the land/natural environment, respecting cultural practices and heritage. Singapore travellers acknowledge that sustainable tourism is the right and moral thing to do but have concerns about the additional costs associated with sustainable tourism options. As a result, willingness to pay for sustainable options is limited amongst Singapore out-of-region travellers and generally lower compared to the Global average. Willingness to pay for practices is similarly low across life stages.

EXPERIENCE WITH AN INDIGENOUS LENS:

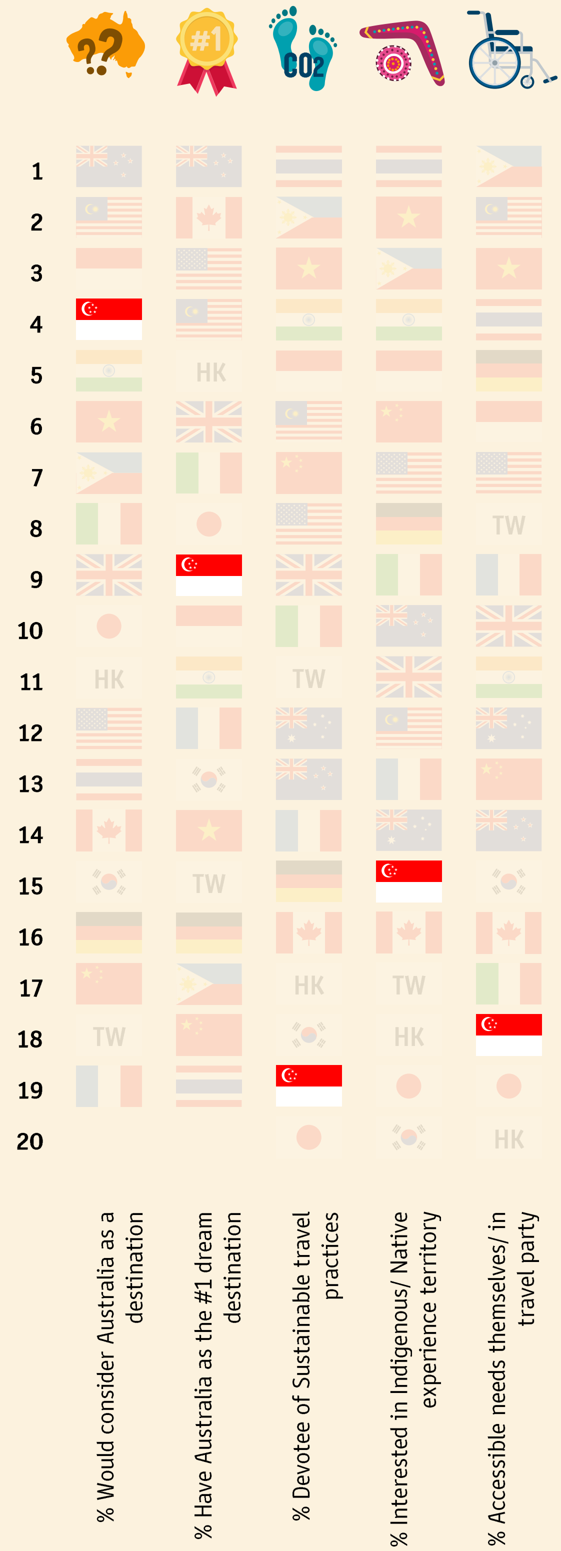
49 per cent of Singapore out-of-region travellers are interested in Indigenous experiences overall (17 per cent want to do it), both metrics are lower compared with the Global average. There is some interest in wildlife, aquatic and coastal or natural environment experiences to be done in an Indigenous setting or with Indigenous people. Indigenous food experiences also have some appeal. Willingness to pay for Indigenous experiences is lower compared to the Global average. As well as additional costs, there are concerns about the safety and potential exploitation of Indigenous peoples or communities. Education could assist to avert some of these concerns.

TRAVELLER NEEDS – ACCESSIBILITY:

16 per cent of Singapore out-of-region travellers have accessibility needs, but these needs have a big impact across the travel experience. These travellers are more likely to desire Adventure and Transformation from their travel than travellers without accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by almost 1 in 2 out-of-region travellers from Singapore but only 4 per cent have Australia as their #1 dream destination (behind Japan, South Korea, Taiwan, the USA, Switzerland, Canada, China, and New Zealand). There are several experience territories that are strongly associated with Australia. As a top 3 destination, Australia is associated with agritourism, aquatic and coastal, hobbies and leisure, Indigenous, journeys, long stay, recreation and outdoors and wildlife experiences. Australia is ranked 4th for Natural environment (behind New Zealand, Switzerland, and Japan), but food and drink experiences are less strongly associated (rank 20th). There is opportunity for Indigenous experiences – Australia is ranked 3rd for these experiences overall (behind South Africa and New Zealand) but this experience territory requires strengthening to improve its appeal, along with associated experiences such as wildlife, aquatic and coastal.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY S.KOREA

TRAVELLER PROFILES:

South Korean out-of-region travellers are more often travelling with friends compared with the Global average.

TRAVELLER NEEDS:

South Korean out-of-region travellers are particularly looking forward to indulging and pampering themselves, feeling secure and comfortable and focusing on physical/mental wellbeing, all while feeling relaxed and escaping the pressures of everyday life. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), South Korean out-of-region travellers are most often travelling for Transformation, which is in higher demand than the Global average, especially for High Yield Travellers and Luxury travellers, who make up 39 per cent and 5 per cent of the total South Korean out-of-region traveller market respectively.

EXPERIENCE TERRITORIES:

There is high interest in food and drink and natural environment experience territories. Heritage, hobbies and leisure, events and festivals, and wellness are also in demand, more so than for the Global average. Food and drink includes tasting trails, wine/beer tasting, Indigenous food experiences and wine/beer pairings with food and food festivals. Each of these territories are of more interest than the Global average. The natural environment includes natural wonders, aurora exploration (which is of more interest compared with the Global average) and exploring wilderness/nature. Heritage includes architecture, historical sites, museums/galleries and ancient civilizations/ruins. Again each of these experiences are of more interest compared with the Global average. Wellness includes hot springs, wellness retreats and forest bathing.

TRAVELLER NEEDS - SUSTAINABILITY:

South Korean out-of-region travellers place most importance on sustainable tourism practices that include respecting cultural heritage, protecting the land/natural environment and ethical treatment of animals/wildlife, but importance is lower across these experiences compared with the Global average. South Korean travellers believe that sustainability is important in daily life, but it does not shape travel and there is a low interest in and willingness to pay more for these experiences as it is assumed there is an additional cost, that it has a negative impact on the quality of the vacation, and that it is the responsibility of the destination, rather than the individual traveller.

EXPERIENCE WITH AN INDIGENOUS LENS:

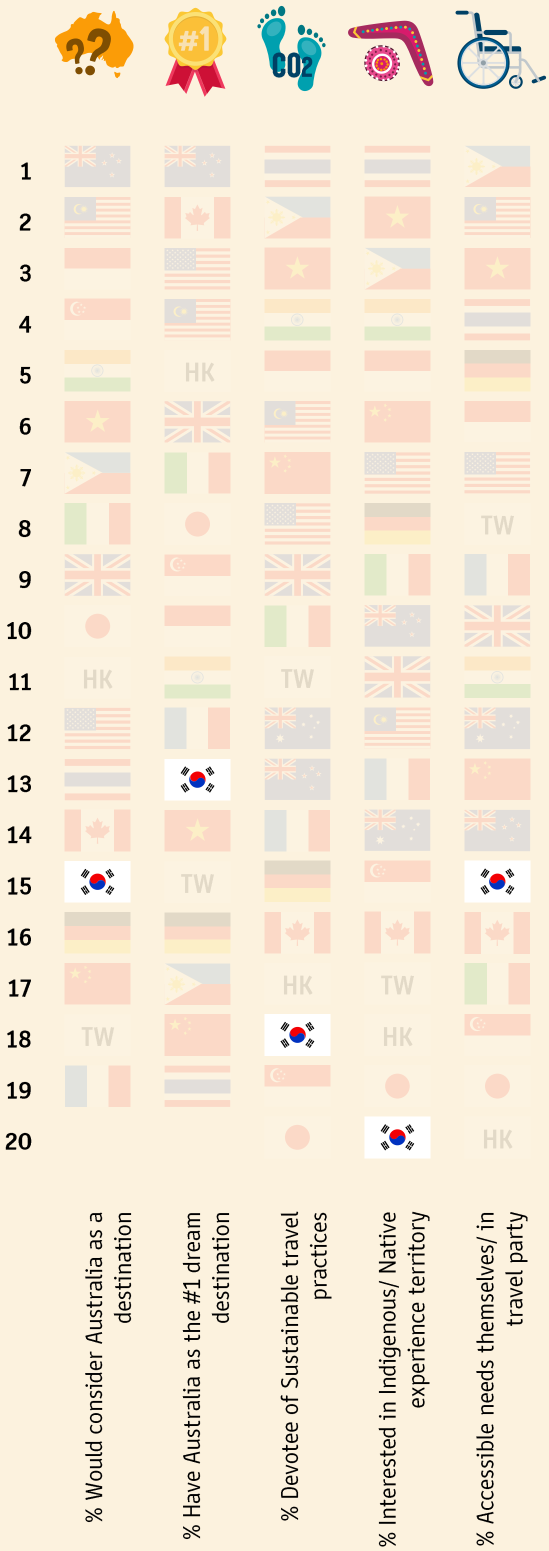
36 per cent South Korean out-of-region travellers are interested in Indigenous experiences overall. Only 7 per cent want to do an Indigenous experience (which is lower compared to the Global average). There is some interest in wildlife experiences that are done with Indigenous people or in Indigenous settings, but willingness to pay more is lower compared to the Global average. Concerns about Indigenous experiences – safety, hygiene, additional costs, access issues, discomfort and being of lower quality – are all higher compared with the Global average. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

18 per cent of South Korean out-of-region travellers have accessibility needs, and these needs have at least some impact across the travel experience. These travellers are as likely to desire Transformation from their travel than travellers without accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

: Australia is considered by 29 per cent out-of-region travellers from South Korea. 3 per cent have Australia as their #1 dream destination (behind Hawaii, the USA, Canada, Switzerland, Japan, and Spain). Australia is strongly associated with wildlife (rank 2nd, behind South Africa), recreation and outdoors, agritourism and long stay and is ranked 4th in association for natural environment experiences (behind Switzerland, Canada, and New Zealand) but is less well associated with experience territories that most interest South Korean travellers: food and drink (rank 22nd), heritage (rank 22nd), events and festivals (rank 20th) or wellness (rank 15th).



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY CANADA

TRAVELLER PROFILES:

Canadian out-of-region travellers spend their vacations with a mix of companions but travel more often as a couple without children compared to the Global average.

TRAVELLER NEEDS:

Canadian out-of-region travellers are particularly looking forward to having fun and a sense of adventure (in comparison with the Global average), all while relaxing, reconnecting with others, exploring, learning, and experiencing new things. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Canadian out-of-region travellers are most often travelling for Reconnection and Exploration. These typologies are in higher demand than the Global average, especially for High Yield Travellers, who make up 40 per cent of the total Canadian out-of-region traveller market. Adventure and Passion/hobbies are also common, especially for Long Stay Travellers.

EXPERIENCE TERRITORIES:

There is interest from Canadian out-of-region travellers in a range of experience territories. The top dream territories are food and drink, aquatic and coastal and the natural environment. Food and drink includes street food, casual or mid-range dining, unique or local specialties, fresh seafood, wine/beer tours or pairings, Indigenous food experiences and winery stays. Aquatic and coastal includes beaches, snorkeling, paddle sports (all of more interest compared with the Global average) and water sports. Natural environments include natural wonders and exploring wilderness/nature.

TRAVELLER NEEDS - SUSTAINABILITY:

Canadian out-of-region travellers place most importance on sustainable tourism practices that include ethical treatment of animals, respecting cultural heritage, protection of land/natural environment, respecting cultural practices and ethical treatment of local people. Interest and willingness to pay more for these experiences is lower compared to the Global average. Canadian out-of-region travellers believe that sustainability when travelling is the right and moral thing to do and that it secures experiences for future generations, but there are concerns about additional expenses and a lack of available options to do sustainable tourism options more often. Greater availability and visibility of affordable options are important for Canadian travellers.

EXPERIENCE WITH AN INDIGENOUS LENS:

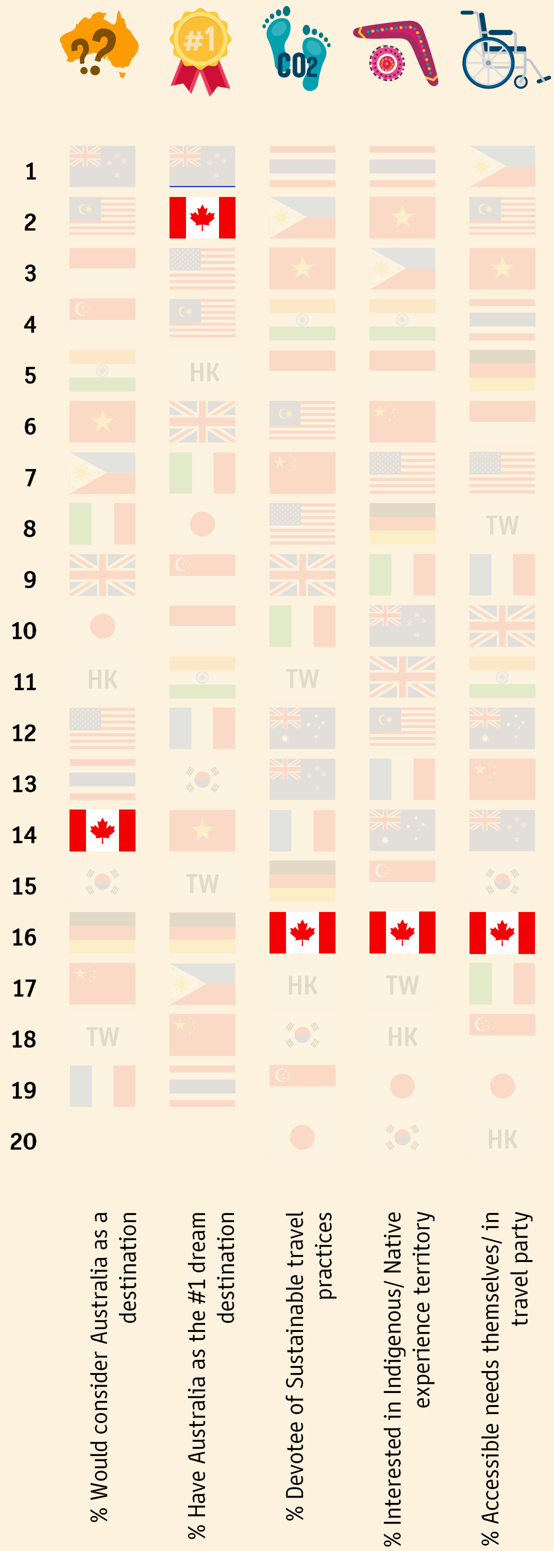
47 per cent of Canadian out-of-region travellers are interested in Indigenous experiences overall (18 per cent want to do it, with both metrics lower compared with the Global average). There is some interest in learning about natural experiences that are done in an Indigenous setting or with Indigenous people, but there are concerns that they might lack authenticity, might be tokenistic or overly touristy and may exploit Indigenous peoples or communities. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

17 per cent of Canadian out-of-region travellers have accessibility needs, and these have at least some impacts across the travel experience. These travellers are more likely to desire Adventure and Transformation from their travel than travellers without accessibility needs.

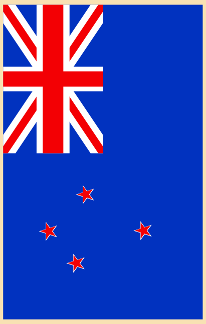
OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 31 per cent out-of-region travellers from Canada. 5 per cent have Australia as their #1 dream destination (behind Hawaii, Caribbean, the USA, Japan, and Mexico). Australia is strongly associated with a number of experience territories, being a top 3 destination associated with wildlife, recreation and outdoors, journeys, Indigenous, hobbies and leisure and long stay. Australia is rank 4th for Natural Environment (behind New Zealand, Hawaii, and Switzerland) and 5th for aquatic and coastal (behind Caribbean, Fiji, Hawaii, and Mexico) but is less well associated with food and drink (rank 24th) experiences.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY
NEW ZEALAND



TRAVELLER PROFILES:

New Zealand out-of-region travellers spend their vacations with a mix of companions but travel less often with friends or parents compared to the Global average.

TRAVELLER NEEDS:

New Zealand out-of-region travellers are especially looking forward to having fun, enjoying themselves, reconnecting and spending quality time with family and friends, all while relaxing, escaping daily life, and exploring new destinations. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), New Zealand out-of-region travellers are most often travelling for Reconnection (which is in higher demand than the Global average, especially for Long Stay Travellers). Adventure is also a driver for Luxury Travellers, Long Stay Travellers, and Working Holiday Makers.

EXPERIENCE TERRITORIES:

There is high interest from New Zealand out-of-region travellers in food and drink, natural environment, and aquatic and coastal experience territories. Food and drink includes street food, Indigenous food experiences, wine/beer tasting tours, casual or mid-range dining and a range of multi-cultural food options. Natural environment experiences include natural wonders, exploring wilderness/nature and aurora exploration (the latter two have more interest compared to the Global average). Aquatic and coastal includes beaches, paddle sports, snorkeling and other water sports which are of more interest than the Global average.

TRAVELLER NEEDS - SUSTAINABILITY:

New Zealand out-of-region travellers place most importance on sustainable tourism practices that include ethical treatment of animals, respecting cultural practices, protecting the land/natural environment, respecting cultural heritage and ethical treatment of local people. New Zealand out-of-region travellers are willing to pay more for ethical treatment of local people and respecting cultural practices, compared to the Global average. Working Holiday Makers are most interested in and willing to pay for sustainable practices. New Zealand out-of-region travellers believe that sustainable tourism is the right and moral thing to do and that it secures experiences for future generations, but there are concerns about additional costs/expenses (which is of higher concern compared with the Global average), and lack of available options to do sustainable tourism options more often. Greater availability and visibility of affordable options are important.

EXPERIENCE WITH AN INDIGENOUS LENS:

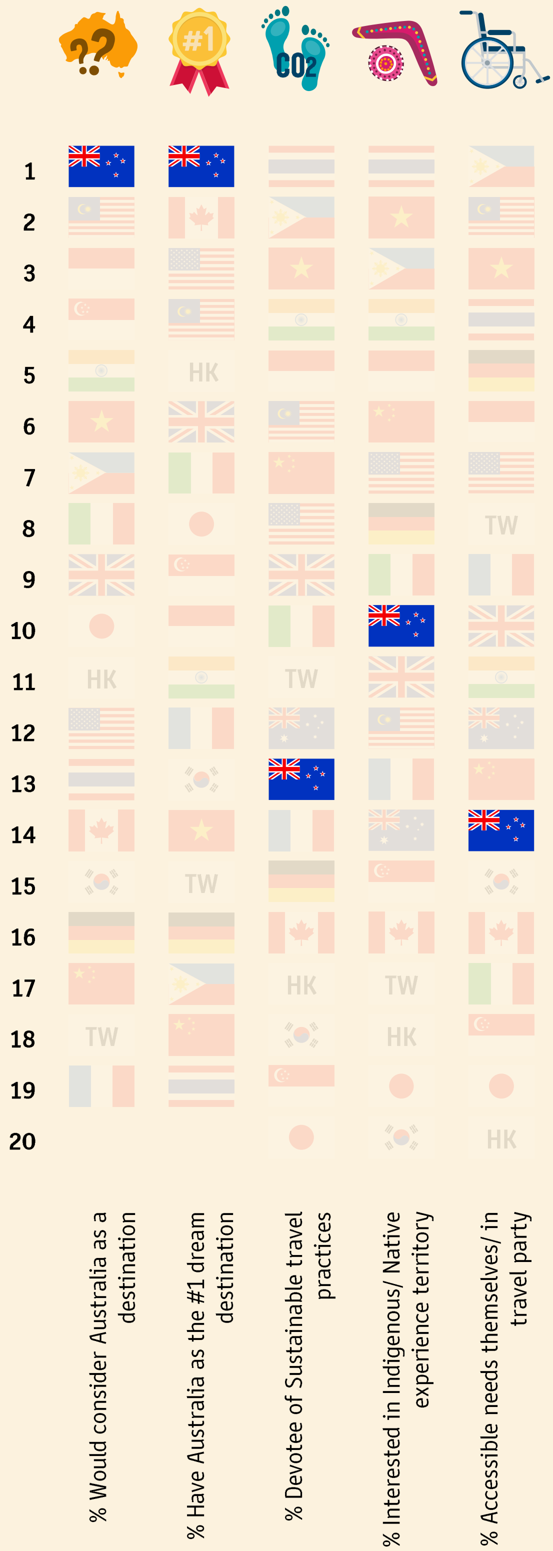
55 per cent of New Zealand out-of-region travellers are interested in Indigenous experiences overall (19 per cent want to do it which is slightly lower compared with the Global average). There are a few experience territories that New Zealand out-of-region travellers would be interested in doing in an Indigenous setting or with Indigenous people (such as long stay, learning, local culture), but there are concerns that it might lack authenticity, might be tokenistic or might exploit these groups. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

19 per cent of New Zealand out-of-region travellers have accessibility needs that impact across the travel experience (less than the Global average). These travellers are more likely to desire Transformation from their travel than travellers without accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 59 per cent out-of-region travellers from New Zealand. 8 per cent have Australia as their #1 dream destination (behind Hawaii, the USA, and Canada). Australia is strongly associated with a number of experience territories, being a top 3 destination associated with wildlife, recreation and outdoor, natural environment, hobbies and leisure, Indigenous, journeys, long stay and agritourism. Australia is ranked #4 for aquatic and coastal but faces significant competition for food and drink (rank 18th). Fiji and Hawaii are competitors across a number of experience territories.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY

FRANCE

TRAVELLER PROFILES:

French out-of-region travellers are spending their vacations with a mix of companions, more often travelling as a couple without children or a family with children, compared to the Global average.

TRAVELLER NEEDS:

French out-of-region travellers are especially looking forward to exploring new destinations and learning and experiencing new things around the world, all while relaxing and having fun. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), French out-of-region travellers are most often travelling for Exploration, especially High Yield Travellers, who make up 13 per cent of the total French out-of-region traveller market.

EXPERIENCE TERRITORIES:

There is high interest from French out-of-region travellers in natural environment, journeys, aquatic and coastal and wildlife experience territories. Natural environment includes natural wonders and exploring wilderness/nature. Journeys includes walking tours, hiking/walking, road trips, cruising and rail journeys. Aquatic and coastal includes beaches and scuba diving, which is of greater interest to French travellers than the Global average. Wildlife includes viewing wildlife in their natural environment, marine life watching and swimming with marine animals, and up-close animal encounters (the latter three with more interest compared to the Global average).

TRAVELLER NEEDS - SUSTAINABILITY:

French out-of-region travellers place most importance on sustainable tourism practices that include the ethical treatment of animals, respecting and preserving cultural heritage and protecting the land or natural environment. French out-of-region travellers believe that sustainable tourism secures experiences for future generations and can bring positive benefits. Cost is a major barrier across travel segments. High Yield Travellers also highlight a lack of available options. Greater availability (and visibility) of affordable options are important for French travellers.

EXPERIENCE WITH AN INDIGENOUS LENS:

51 per cent of French out-of-region travellers are interested in Indigenous experiences overall (20 per cent would really want to do it, which is lower compared to the Global average). Wildlife presents some opportunity, particularly if delivered in an Indigenous setting or with Indigenous people, but there is a reluctance to pay extra for these

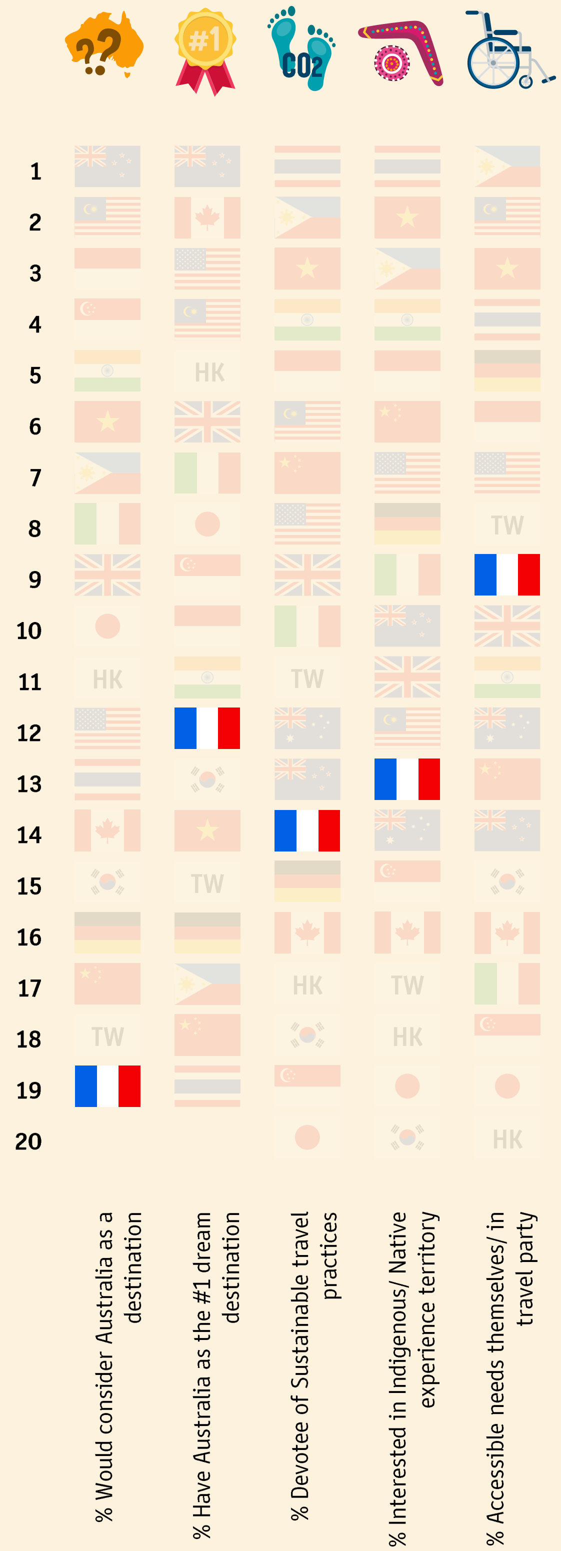
experiences across the potential experience territories. There are concerns that these experience types might exploit Indigenous peoples or communities and might be unsafe. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

One in four French out-of-region travellers have accessibility needs that impact across the travel experience, especially activities, experiences and the choice and style of vacation. These travellers are more likely to desire Adventure from their travel than travellers without accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 23 per cent of out-of-region travellers from France. 3 per cent have Australia as their #1 dream destination (higher consideration and aspiration than for New Zealand). More aspirational destinations include Canada, the USA, Caribbean, Japan, and in-region destinations. Australia is strongly associated with wildlife (rank 1st), recreation and outdoors and long stay (both rank 2nd) and is 3rd for natural environment (behind Canada and New Zealand) but is less well associated with aquatic and coastal (10th) or food and drink (rank 25th). For those interested in Indigenous experiences, Australia offers some appeal – being ranked 4th for this experience territory overall (behind New Zealand, South Africa, Indonesia) and with strengths in wildlife associations.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY GERMANY

TRAVELLER PROFILES:

German out-of-region travellers spend their vacations with a mix of companions, more often travelling as a couple without children compared to the Global average, and less often with friends or parents.

TRAVELLER NEEDS:

German out-of-region travellers are especially looking forward to relaxing and escaping everyday life and immersing in a different culture, all while having fun and exploring, learning, and experiencing new things. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), German out-of-region travellers are most often travelling for Exploration. High Yield Travellers (who make up 25 per cent of the total German out-of-region traveller market) are also travelling for Passion and hobbies, while Long Stay Travellers (who make up 3 per cent of the total German out-of-region traveller market) also travel for Adventure and Passion and hobbies. Working Holiday Makers (who make up 7 per cent of the total German out-of-region traveller market) also travel for Adventure and to get Into Nature.

EXPERIENCE TERRITORIES:

There is high interest from German out-of-region travellers in the natural environment, aquatic and coastal, journeys and wildlife when they travel. Natural environment includes exploring wilderness/nature and natural wonders. Aquatic and coastal includes beaches, snorkelling, other water sports and scuba diving. Journeys includes hiking/walking, walking tours, cycling, road trips and cruising. Wildlife includes viewing wildlife in their natural habitat, marine life watching and swimming. These were of greater interest compared to the Global average. They are also interested in up-close animal encounters.

TRAVELLER NEEDS - SUSTAINABILITY:

German out-of-region travellers place most importance on sustainable tourism practices that include ethical treatment of animals/wildlife, respecting cultural heritage and practices of the destination. But importance, interest in and willingness to pay for these and other sustainable practices is lower than the Global average across all life stages. German out-of-region travellers believe that sustainable tourism is the right and moral thing to do and Working Holiday Makers claim it allows them to travel more without feeling guilty about their impact. Cost and the belief that there are few options are barriers, especially for Working Holiday Makers. Greater availability and visibility of affordable options are important for German travellers.

EXPERIENCE WITH AN INDIGENOUS LENS:

58 per cent of German out-of-region travellers are interested in Indigenous experiences overall. 18 per cent really want to do it which is lower compared with the Global average. Wildlife presents some opportunity to be done in an Indigenous setting or with Indigenous people, with some willingness to pay extra for it when compared

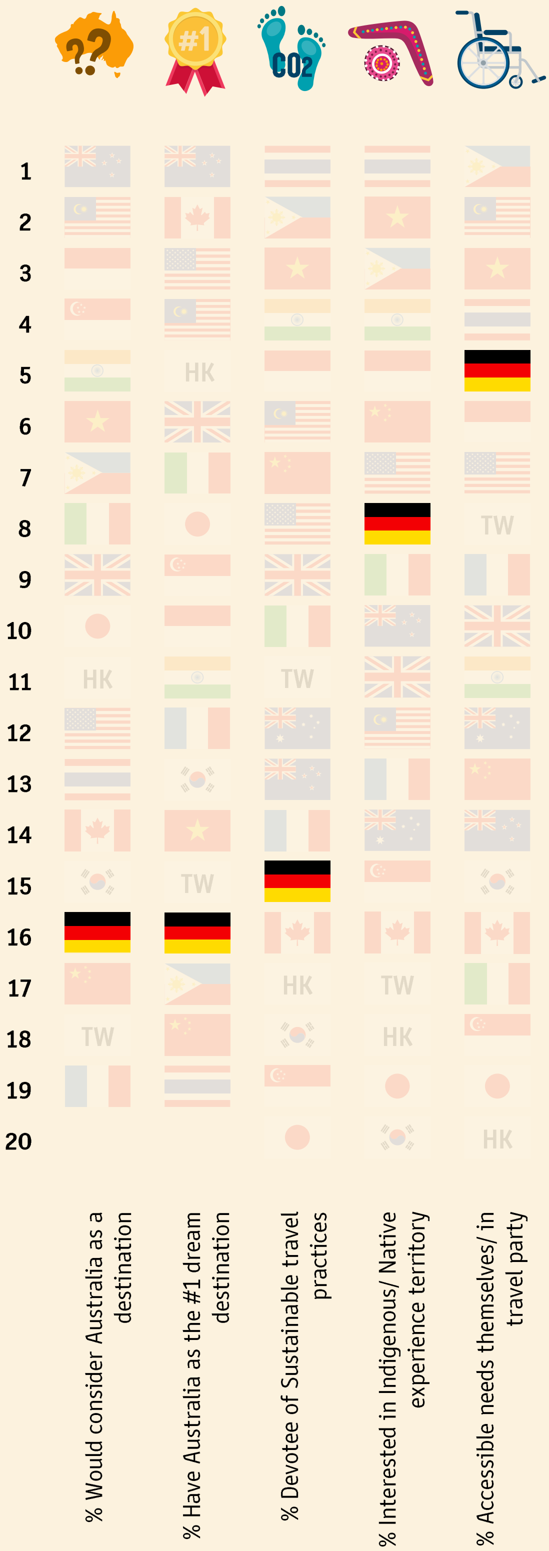
with the Global average. This is similar for local cultural experiences. There are concerns about exploitation and safety. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

One in four German out-of-region travellers have accessibility needs that impact across the travel experience, especially activities, experiences and accommodation. These travellers are more likely to desire Adventure from their travel than travellers without accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 1 in 4 out-of-region travellers from Germany. 2 per cent have Australia as their #1 dream destination. There is similar consideration and aspiration for New Zealand as a destination, but Australia and New Zealand are some way behind key out-of-region competitors including the Caribbean, the USA, Spain, Canada, Hawaii, and in-region destinations. Australia is strongly associated with wildlife, natural environment, journeys and long stay (it is a top 3 destination associated for each), with higher associations compared to the Global average. Australia ranks 7th for aquatic and coastal experiences (the Caribbean, Hawaii and Spain lead here). For those interested in Indigenous experiences, Australia offers some appeal. Australia is ranked 4th for this experience territory overall (behind South Africa, Taiwan, and Mexico), with strengths in wildlife associations.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY
HONG KONG

HK

TRAVELLER PROFILES:

Hong Kong out-of-region travellers spend their vacations with a mix of companions, more often travelling with friends and parents compared to with the Global average.

TRAVELLER NEEDS:

Hong Kong out-of-region travellers look forward to having fun, reconnecting with family and friends and indulging themselves, and they want to feel secure when they travel. They also want to relax and escape the pressures of everyday life. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Hong Kong out-of-region travellers mostly travel for Reconnection and Passion/hobbies (these typologies are of higher demand than the Global average) and Into Nature. Working Holiday Makers also travel for Transformation.

EXPERIENCE TERRITORIES:

There is high interest from Hong Kong out-of-region travellers in food and drink, journeys, and natural environment experience territories. Food and drink is a dream experience territory for 1 in 2 Hong Kong out-of-region travellers (this is higher than the Global average). Food and drink includes street food, unique or local specialties, fresh seafood, a range of multicultural options, meet the maker tours and wine/beer and food pairings. These experiences are of more interest in comparison with the Global average. Journeys includes campervans, rail journeys and cruising. Natural environment includes natural wonders, exploring wilderness/nature and aurora exploration and seasonal natural events. The latter two are of more interest than the Global average.

TRAVELLER NEEDS - SUSTAINABILITY:

Hong Kong out-of-region travellers place more importance on sustainable tourism practices that include ethical treatment of animals, protection of land/natural environment, respecting cultural practices and heritage of the destination. Hong Kong travellers claim that sustainable tourism makes them feel better about their vacation and that it is the right thing to do, but cost and perceived additional effort are barriers. As a result, there is a reluctance to pay extra for sustainable practices when compared with the Global average.

EXPERIENCE WITH AN INDIGENOUS LENS:

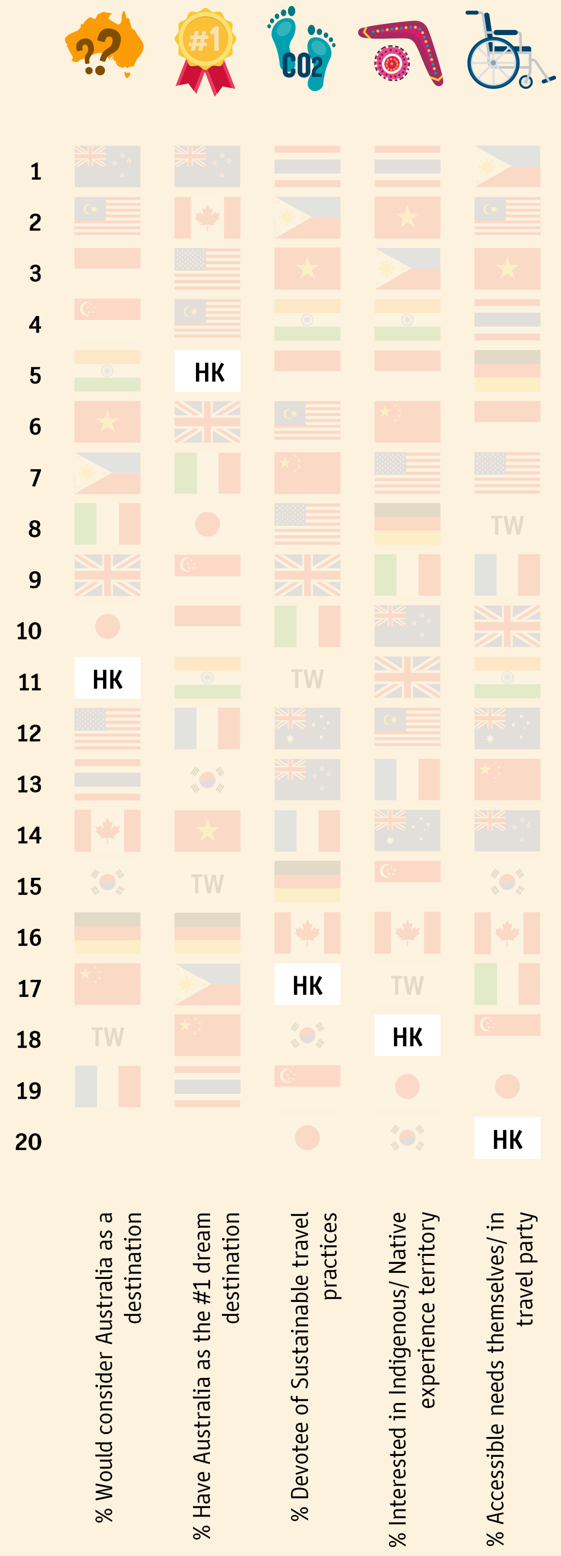
45 per cent of Hong Kong out-of-region travellers are interested in Indigenous experiences overall. 12 per cent really want to do it, which is lower than the Global average. Wildlife, wellness, and food and drink experiences with Indigenous people or in Indigenous settings present interesting opportunities for Hong Kong travellers, and there is willingness to pay extra for these experiences, which is higher than the Global average for several experience territories. There are concerns about the safety, hygiene and ease of access for these experiences, along with not knowing enough about these experiences. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

A small minority of Hong Kong out-of-region travellers have accessibility needs (9 per cent), which have at least some impacts across the travel experience. These travellers are more likely to desire Adventure from their travel than travellers without accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 1 in 3 out-of-region travellers from Hong Kong. 5 per cent have Australia as their #1 dream destination (behind Japan, Taiwan, China, and Canada). There is higher consideration and aspiration for Australia than for New Zealand. Hong Kong travellers have strong associations with Australia across many experience territories, more than the Global average, with strengths in wildlife (rank 2nd), aquatic and coastal (rank 4th) and natural environment (rank 4th). Australia is ranked 7th for Journeys (Japan, Taiwan, and Switzerland lead here). For those interested in Indigenous experiences, Australia offers some appeal – being ranked 5th for this experience territory overall (behind South Africa, Brazil, Fiji, and Mexico) and with strengths in wildlife associations.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY JAPAN

TRAVELLER PROFILES:

Japanese out-of-region travellers spend their vacations with a mix of companions, more often travelling with friends, or alone compared to the Global average.

TRAVELLER NEEDS:

Japanese out-of-region travellers are especially looking forward to having fun and enjoying, indulging, and pampering themselves in their travels (when compared with the Global average) as well as relaxing and escaping the pressures of everyday life. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Japanese out-of-region travellers are most often travelling for Passion/hobbies (this is of higher demand than the Global average, especially for Working Holiday Makers, who make up 7 per cent of the total Japanese out-of-region traveller market). Luxury travellers, who make up 4 per cent of the total Japanese out-of-region traveller market, are most often travelling for Restoration.

EXPERIENCE TERRITORIES:

There is high interest from Japanese out-of-region travellers in the food and drink experience territory, along with heritage, journeys, and hobbies and leisure. Food and drink includes street food, unique or local specialties, casual or mid-range dining, wine/beer tasting tours or pairing with food. Heritage includes historical sites, museums/galleries (these experiences are of more interest compared with the Global average), architecture and ancient civilizations or ruins. Journeys include glamping, rail journeys, cruising and coach travel/tours.

TRAVELLER NEEDS - SUSTAINABILITY:

include glamping, rail journeys, cruising and coach travel/tours.

Traveller needs: Sustainability: Japanese out-of-region travellers place most importance on sustainable tourism practices that include respecting cultural heritage of the destination and ethical treatment of animals, but importance, interest in and willingness to pay for these and other sustainable tourism practices is lower compared to the Global average. Japanese out-of-region travellers claim that sustainable tourism can make them feel better about their vacation or bring personal joy, but they are less likely to believe it is the right and moral thing to do (compared to the Global average), and cost is a big barrier. Very few Japanese out-of-region travellers are devoted to sustainable tourism.

EXPERIENCE WITH AN INDIGENOUS LENS:

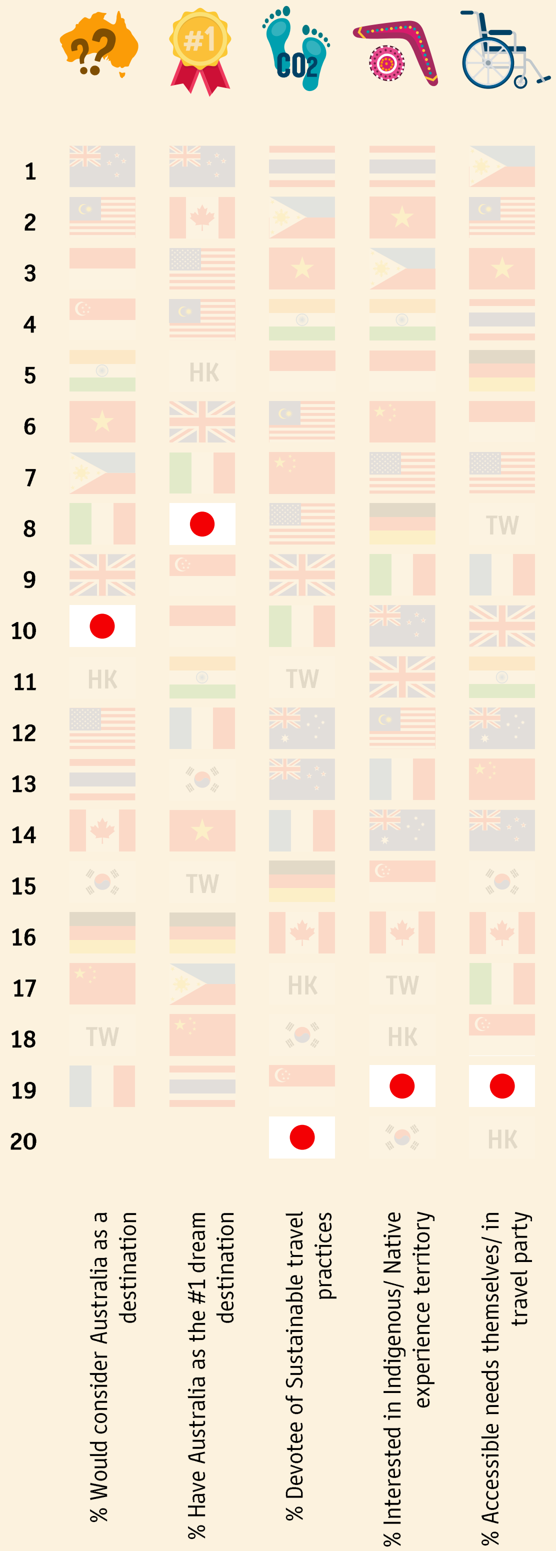
37 per cent Japanese out-of-region travellers are interested in Indigenous experiences overall (12 per cent really want to do it, which is lower compared to the Global average). There is some interest in learning or wellness experiences that are done in an Indigenous setting or with Indigenous people, but willingness to pay extra is lower compared to the Global average. Japanese travellers are concerned about safety and doing or saying something to offend. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

One in ten Japanese out-of-region travellers have accessibility needs (11 per cent), which have at least some impacts across the travel experience, especially in the choice of destination. Adventure experiences are particularly appealing to Japanese travellers with accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 1 in 4 Japanese out-of-region travellers. 4 per cent have Australia as their #1 dream destination (behind Hawaii, USA, Taiwan, South Korea, and Canada). Australia has some strong associations across the experience territories (though New Zealand is a big competitor across Australia's strengths – natural environment, wildlife, aquatic and coastal), but is less well associated with food and drink (rank 17th), heritage (rank 19th), journeys (rank 6th) and hobbies and leisure (rank 6th). For those interested in Indigenous, there is an opportunity for Australia as it is ranked #1 for Indigenous experiences overall, and for wildlife experiences, , which is an interesting experience territory to be done in an Indigenous setting or with Indigenous people.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY INDONESIA

TRAVELLER PROFILES:

Indonesian out-of-region travellers spend their vacations with a mix of companions, more often travelling as family with children compared to the Global average, even amongst High Yield Travellers, Luxury Travellers, and Working Holiday Makers.

TRAVELLER NEEDS:

Indonesian out-of-region travellers are especially looking forward to exploring new destinations, learning and experiencing new things, indulging themselves when they travel and feeling secure and comfortable (in comparison with the Global average), as well as relaxing and escaping the pressures of everyday life. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destination. This is of higher demand than the Global average, across all travel demand segments.

EXPERIENCE TERRITORIES:

Indonesian out-of-region travellers are interested in a range of experience territories, with more interest across many territories compared with the Global average. Food and drink experiences rank the highest, followed by natural environment. Food and drink includes street food, unique or local specialties and fresh seafood, as well as Indigenous food experiences, winegrowing region visits and meet the maker food/drink tours. All of these interests are higher than the Global average. Natural environment includes natural wonders, exploring wilderness/nature and seasonal nature events, all of which are of more interest than the Global average.

TRAVELLER NEEDS - SUSTAINABILITY:

Indonesian out-of-region travellers place high importance on a range of sustainable tourism practices compared with the Global average and show more interest in sustainable practices and a higher willingness to pay for them compared to the Global average. More than 1 in 3 Indonesian out-of-region travellers are devoted to several sustainable practices – they see the importance of doing them and paying more for them. Young families are the most likely to be interested in and willing to pay for sustainable practices. Indonesian out-of-region travellers claim that there are many motivators to travelling sustainably: it can bring benefit to self and future travellers (beyond being the right and moral thing to do), but cost and limited easy options are barriers.

EXPERIENCE WITH AN INDIGENOUS LENS:

67 per cent of Indonesian out-of-region travellers are interested in Indigenous experiences overall (29 per cent really want to do it, both metrics higher compared with the Global average). There are several experience territories that interest Indonesian travellers that can be done with Indigenous peoples or in Indigenous settings.

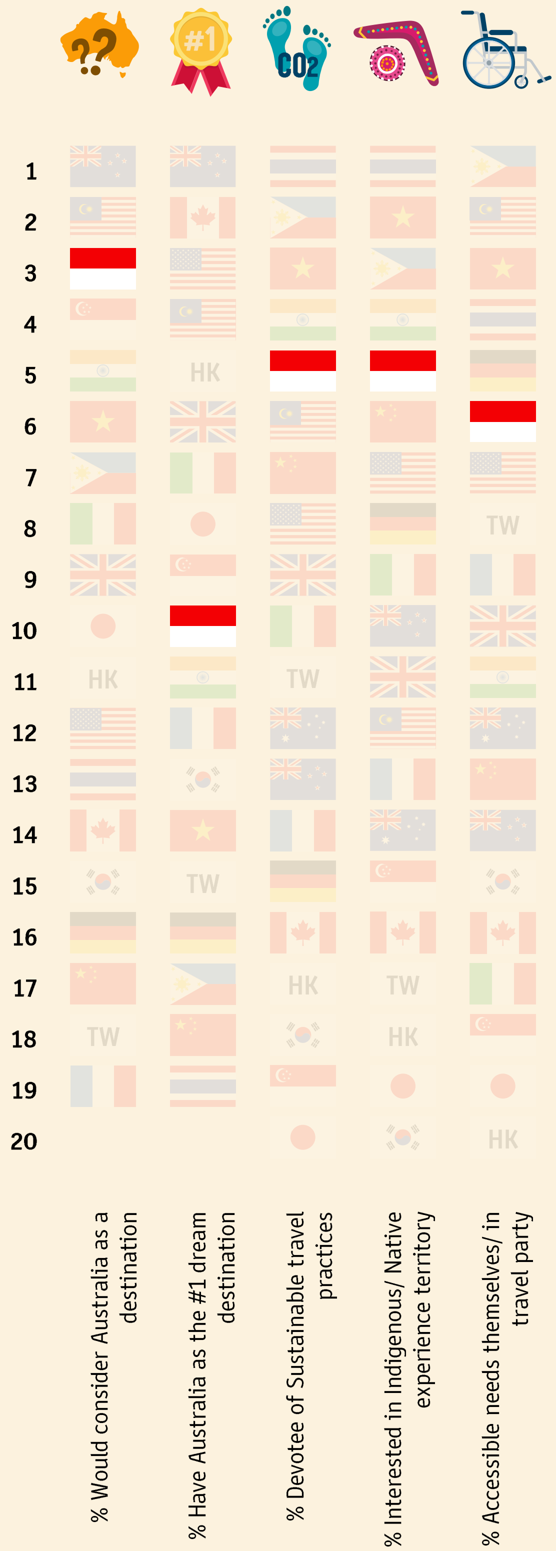
These include recreation and outdoor, agritourism, natural environment, aquatic and coastal and wellness. All of these are of more interest and there is higher willingness to pay more compared with the Global average. Indonesian out-of-region travellers expressed concerns about doing or saying something to offend, safety and the potential exploitation of Indigenous peoples or communities. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS – ACCESSIBILITY:

One in four Indonesian out-of-region travellers have accessibility needs, which have a big impact across the travel experience, especially choice of destination. However, there is little difference in experience demand of those travelling with accessibility needs versus those that are not.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by nearly 1 in 2 out-of-region travellers from Indonesia and 3 per cent have Australia as their #1 dream destination (behind Japan, South Korea, Hawaii, Singapore, Canada, the USA, and Dubai). Australia is strongly associated with wildlife (rank 2nd) and is ranked 5th for natural environment (behind Japan, Switzerland, New Zealand, and Canada). Australia is less strongly associated with food and drink (rank 22nd). For those interested in Indigenous experiences, Australia faces competition in associations with the territory overall (ranked 9th) and the individual experience territories that could align with an Indigenous opportunity (recreation and outdoor rank 5th, agritourism rank 6th, natural environment rank 5th, aquatic and coastal rank 5th and wellness rank 13th).



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY ITALY

TRAVELLER PROFILES:

Italian out-of-region travellers spend their vacations with a mix of companions, more often travelling as a couple without children compared to the Global average.

TRAVELLER NEEDS:

Italian out-of-region travellers are especially looking forward to having fun, exploring new destinations, and immersing themselves in a different culture and way of life (compared with the Global average), along with relaxing and escaping daily life. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Italian out-of-region travellers are most often travelling for Exploration (higher demand than the Global average across all traveller demand segments). Passion/hobbies were also common drivers for Long Stay Travellers, and Adventure was a common driver for Working Holiday Makers.

EXPERIENCE TERRITORIES:

There is high interest from Italian out-of-region travellers in natural environment and aquatic and coastal experiences when they travel (these are of more interest compared to the Global average), as well as food and drink, although this is of less interest compared to the Global average. There is also more interest in heritage and wellness. Natural environment includes natural wonders, aurora exploration (both of more interest compared to the Global average) and exploring wilderness/nature. Aquatic and coastal includes beaches, scuba diving, snorkelling, and sailing. Heritage includes historical sites, museums/galleries, ancient civilisations, architecture and learning the culture behind the community. Each of these experiences are of more interest compared to the Global average. Wellness includes hot springs, spa treatments and wellness retreats.

TRAVELLER NEEDS - SUSTAINABILITY:

Italian out-of-region travellers place more importance on sustainable tourism practices that include protecting the land/natural environment, respecting the cultural heritage and ethical treatment of animals and wildlife. Italian out-of-region travellers believe that sustainable tourism is the right and moral thing to do, but they are less likely to see the personal benefits of sustainable tourism when compared to the Global average. Cost and limited options are barriers to wider participation. Working Holiday Makers also lack trust and authenticity in providers offering sustainable practices. Greater availability and visibility of affordable options is important for Italian travellers.

EXPERIENCE WITH AN INDIGENOUS LENS:

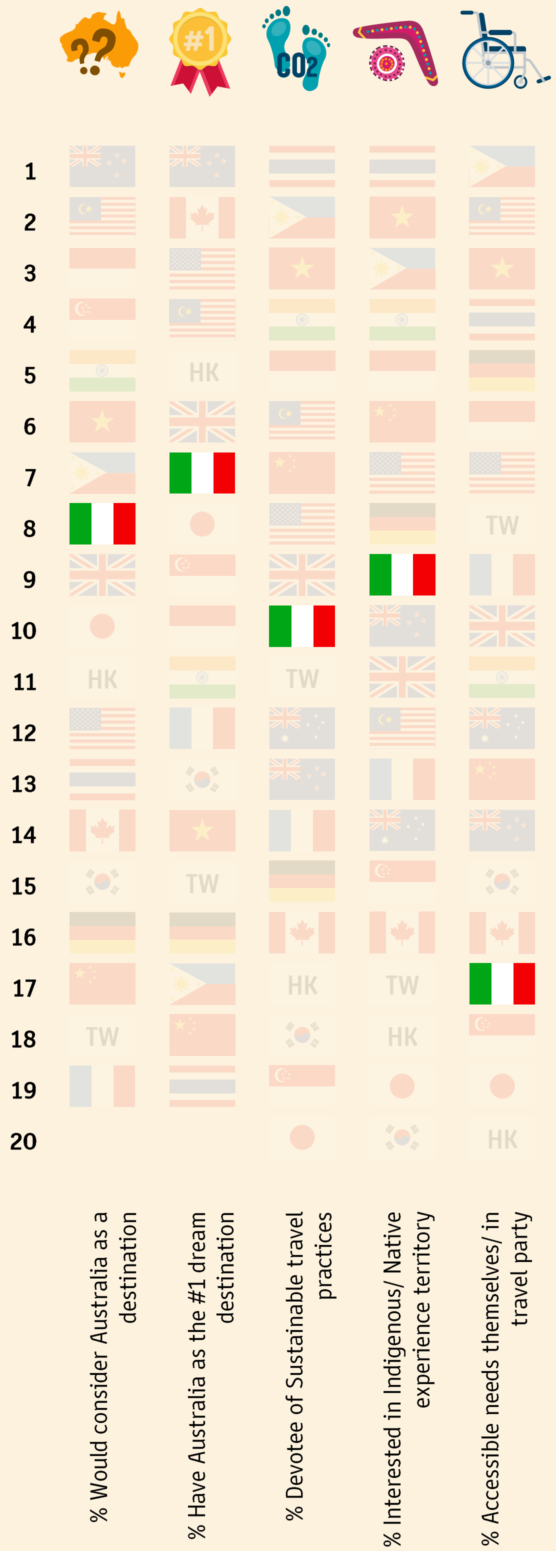
56 per cent of Italian out-of-region travellers are interested in Indigenous experiences overall (16 per cent really want to do it, which is lower compared to the Global average). There is interest from Italian out-of-region travellers in some experience territories (such as wildlife) being done in an Indigenous setting or with Indigenous people. But there are several concerns that prevent engagement (e.g. exploitation, safety) and some reluctance to pay extra for these experiences. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

A minority of Italian out-of-region travellers have accessibility needs (17 per cent), which have at least some impacts across the travel experience. These travellers still desire exploration from their travels, which is similar to travellers without accessibility needs, but they are also more likely to seek adventure as well.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 38 per cent out-of-region travellers from Italy and 4 per cent have Australia as their #1 dream destination (behind the USA, Japan, Caribbean, Hawaii, Canada; and on par with Mexico). Australia is strongly associated with several experience territories, being in the top 3 destinations associated with natural environment, wildlife, journeys, recreation and outdoor and long stay. On the other hand, Australia is less strongly associated with aquatic and coastal (rank 5th), heritage (rank 22nd) and wellness (rank 17th). Australia is ranked 5th for the Indigenous experience territory overall, behind South Africa, Mexico, Brazil, and Malaysia.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY

MALAYSIA

TRAVELLER PROFILES:

Malaysian out-of-region travellers spend their vacations with a mix of companions, more often travelling as a family with children or with parents or extended family.

TRAVELLER NEEDS:

Malaysian out-of-region travellers are especially looking forward to exploring new destinations and indulging or pampering themselves (compared to the Global average), along with relaxing and escaping daily pressures and having fun. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Malaysian out-of-region travellers travel for a range of needs: Exploration, Adventure, Passion/hobbies, Reconnection, Into Nature or Transformation. High Yield Travellers are most often travelling for Reconnection or Exploration (these are of higher demand than the Global average for this segment).

EXPERIENCE TERRITORIES:

There is high interest from Malaysian out-of-region travellers in food and drink and natural environment when they travel (when compared to the Global average). Food and drink includes street food, fresh seafood, unique or local specialties, a range of multicultural food options and fresh produce, winegrowing regions, Indigenous food experiences and winery stays. All of these experiences are of more interest than the Global average. Natural environment includes natural wonders, exploring wilderness/nature and seasonal natural events.

TRAVELLER NEEDS - SUSTAINABILITY:

Malaysian out-of-region travellers place most importance on sustainable tourism practices that include respecting cultural heritage, protecting the land/natural environment, ethical treatment of local people and respecting cultural practices. Young families are the most likely to be interested in, and willing to pay for, sustainable practices. Malaysian out-of-region travellers claim several motivations to sustainable tourism: it is the right thing to do and can offer benefits to self (personal joy, feeling better about vacation, enjoyment) and to future generations (all stronger motivations compare to the Global average). Cost is a big barrier, along with the effort involved (both are bigger barriers compared to the Global average) and limited options. Greater availability and visibility of affordable and easy-to-do options will be important for Malaysian travellers.

EXPERIENCE WITH AN INDIGENOUS LENS:

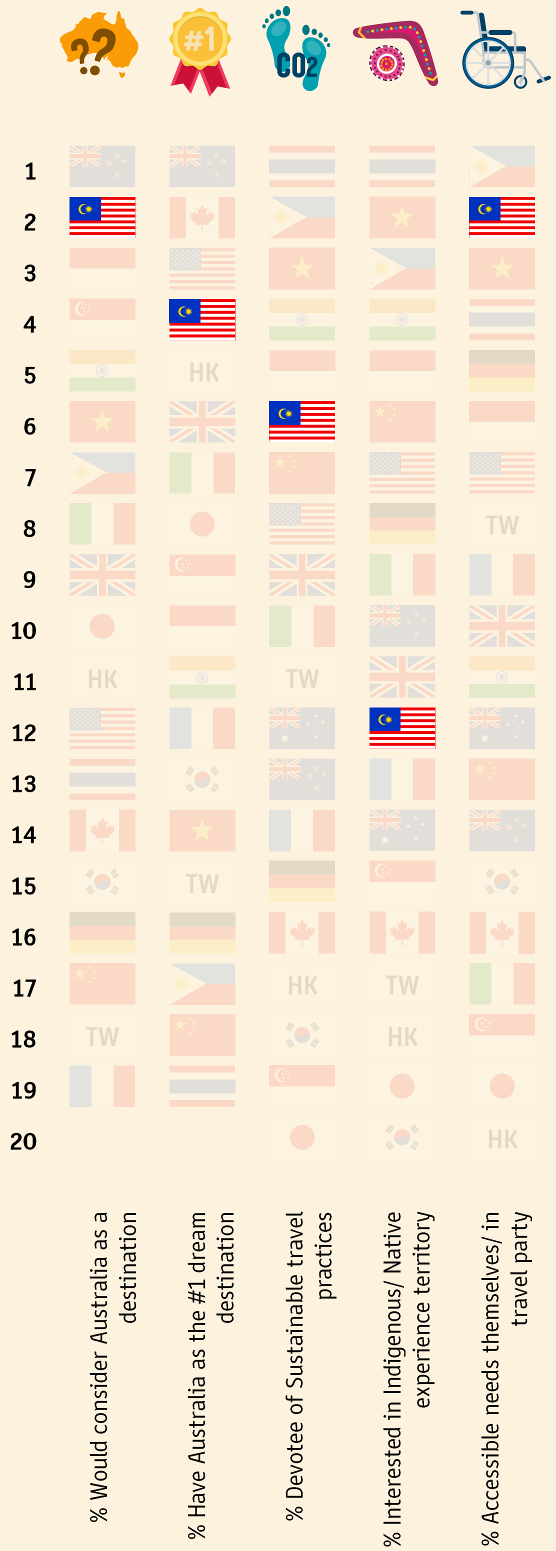
53 per cent Malaysian out-of-region travellers are interested in Indigenous experiences overall (19 per cent really want to do it, with both metrics lower compared to the Global average). There is interest from Malaysian out-of-region travellers in experiences (such as wildlife) in an Indigenous setting or with Indigenous people. However, there are concerns that prevent engagement such as safety, causing offence; and some reluctance to pay extra for these experiences. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

1 in 3 Malaysian out-of-region travellers have accessibility needs, which have at least some impact across the travel experience. These travellers are more likely to desire Adventure (land- or water-based, and journeys) from their travel than travellers without accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 1 in 2 Malaysian out-of-region travellers and 5 per cent have Australia as their #1 dream destination (behind Japan, South Korea, China, Taiwan, and on par with Thailand, Indonesia, Canada, and Hawaii). Australia is strongly associated with several experience territories, being in the top 3 destinations associated with wildlife, recreation and outdoor, journeys, agritourism, hobbies and leisure, but is less strongly associated with food and drink (rank 18th) and natural environment (rank 5th). Australia is ranked 5th for the Indigenous experience territory overall, behind South Africa, Indonesia/Bali, Hawaii and New Zealand.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY PHILIPPINES

TRAVELLER PROFILES:

Philippines out-of-region travellers spend their vacations with a mix of companions, more often travelling as a family with adult children compared to the Global average.

TRAVELLER NEEDS:

Philippine out-of-region travellers especially look forward to relaxing and escaping everyday life, exploring new destinations, a sense of adventure and reconnecting with others (compared to the Global average), along with having fun and enjoying themselves. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Philippines out-of-region travellers often travel for a range of needs: Reconnection, Exploration, Adventure, Into Nature, Passion/hobbies, or Transformation. High Yield Travellers are most often travelling for Exploration or Reconnection (this is higher demand than the Global average for this segment).

EXPERIENCE TERRITORIES:

There is high interest from Philippines out-of-region travellers in a range of experience territories (more interest across all territories compared to the Global average), with natural environment and food and drink in most demand. Natural environment includes natural wonders, exploring wilderness/nature and aurora exploration (all of more interest compared to the Global average). Food and drink includes street food, range of multicultural food options, fresh produce, meet the maker food/drink tours, Indigenous food experiences, wine/beer tasting tours and bar hopping (all of more interest compared to the Global average), along with unique or local specialties and fresh seafood.

TRAVELLER NEEDS - SUSTAINABILITY:

Philippines out-of-region travellers place high importance on a range of sustainable tourism practices compared to the Global average, also showing more interest in doing those practices and a higher willingness to pay for them compared to the Global average. 1 in 2 Philippines out-of-region travellers are devoted to several sustainable practices, in seeing the importance in doing them and paying more for them. Young singles/couples and young families are the most likely to be interested in and willing to pay for sustainable practices. Philippines out-of-region travellers see sustainable tourism as the right and moral thing to do and that it has benefits to self and others (all stronger motivators compared to the Global average), but limited options (a bigger concern compared to the Global average), cost and additional effort are barriers.

EXPERIENCE WITH AN INDIGENOUS LENS:

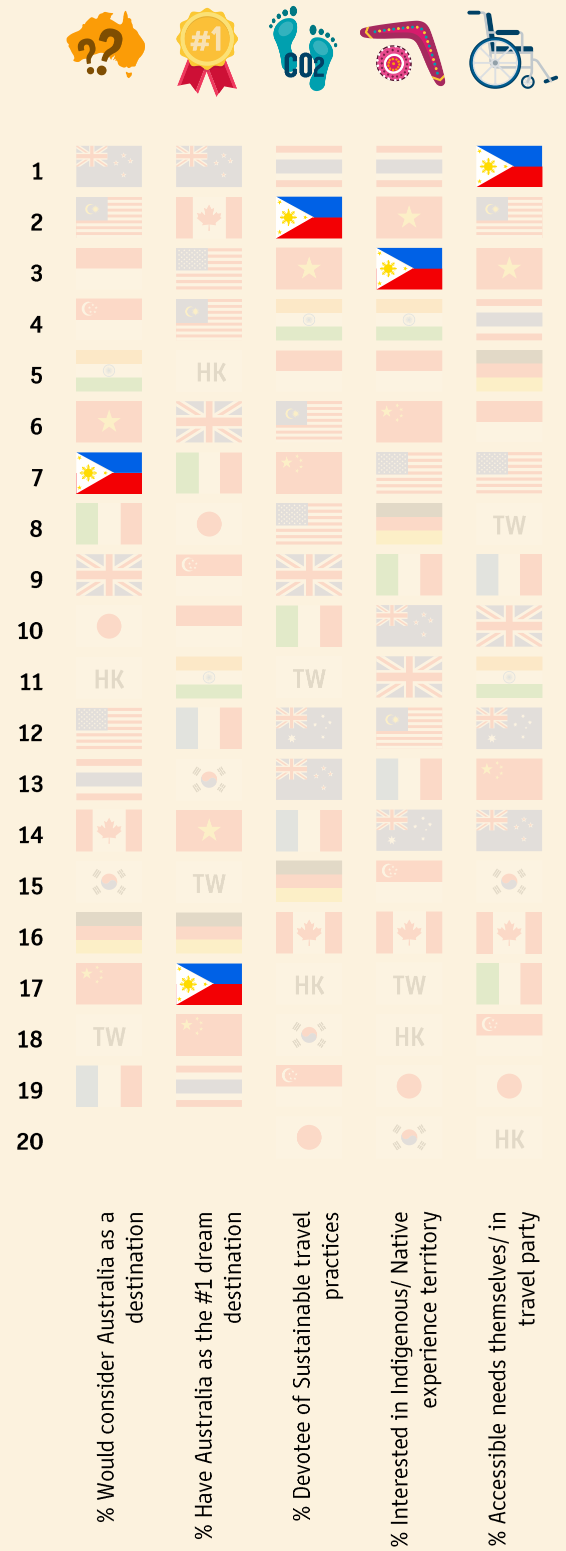
75 per cent of Philippines out-of-region travellers are interested in Indigenous experiences overall (36 per cent really want to do it), both metrics are higher compared to the Global average. Philippines out-of-region travellers claim a strong interest and willingness to pay for many types of experiences in an Indigenous setting or with Indigenous people, but there are some concerns that prevent engagement: safety, access (too far, difficult to get to), causing offence and the extra costs. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

1 in 3 Philippines out-of-region travellers have accessibility needs, which have a big impact across the travel experience (this is more impact compared to the Global average). There is little difference in experience demand of those travelling with accessibility needs versus those that are not.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 38 per cent out-of-region travellers from Philippines and 2 per cent have Australia as their #1 dream destination (this is lower aspiration compared to the Global average). Australia is strongly associated with wildlife (rank 3rd) but is less well associated with many other experience territories compared to the Global average, including natural environment (rank 9th). For those interested in Indigenous experiences, Australia is ranked 17th in association with the territory overall (lower association compared to the Global average), with South Africa, Indonesia/Bali and Vietnam leading here.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY THAILAND

TRAVELLER PROFILES:

Thailand out-of-region travellers spend their vacations with a mix of companions, more often travelling with friends or as a family with adult children compared to the Global average.

TRAVELLER NEEDS:

Thailand out-of-region travellers are especially looking forward to getting in touch with nature, feeling secure and comfortable, learning, and experiencing new things, and focusing on mental and physical wellbeing (compared to the Global average), as well as relaxing and escaping pressures of everyday life and having fun. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Thai out-of-region travellers most often travel for Into Nature and Transformation (which are of higher demand than the Global average, especially for High Yield Travellers). Long Stay Travellers and Working Holiday Makers also travel for Adventure.

EXPERIENCE TERRITORIES:

There is high interest from Thailand out-of-region travellers in a range of experience territories (more interest across all territories compared to the Global average), with natural environment and food and drink in most demand. Natural environment includes natural wonders and seasonal natural events (both of more interest compared to the Global average). Food and drink includes fresh produce, Indigenous dining, or food experiences, tasting trails, meet the maker food/drink tours, wine/beer tasting tours and food/drink festivals (all of more interest compared to the Global average).

TRAVELLER NEEDS - SUSTAINABILITY:

Thailand out-of-region travellers place high importance on a range of sustainable tourism practices compared to the Global average, also showing more interest in doing these practices and a higher willingness to pay for them compared to the Global average. More than 1 in 2 Thailand out-of-region travellers are devoted to several sustainable practices, see the importance in doing them and paying more for them. Young families are most likely to be interested in and willing to pay more for sustainable practices. Thailand out-of-region travellers claim that sustainable tourism brings several benefits to travellers themselves – such as personal joy and satisfaction (a stronger motivator compared to the Global average), makes them feel better and are enjoyable experiences, as well as being the right and moral thing to do. Cost is the main barrier, as well as requiring too much effort and potentially negatively impacting the quality of the vacation (all three are bigger barriers compared to the Global average).

EXPERIENCE WITH AN INDIGENOUS LENS:

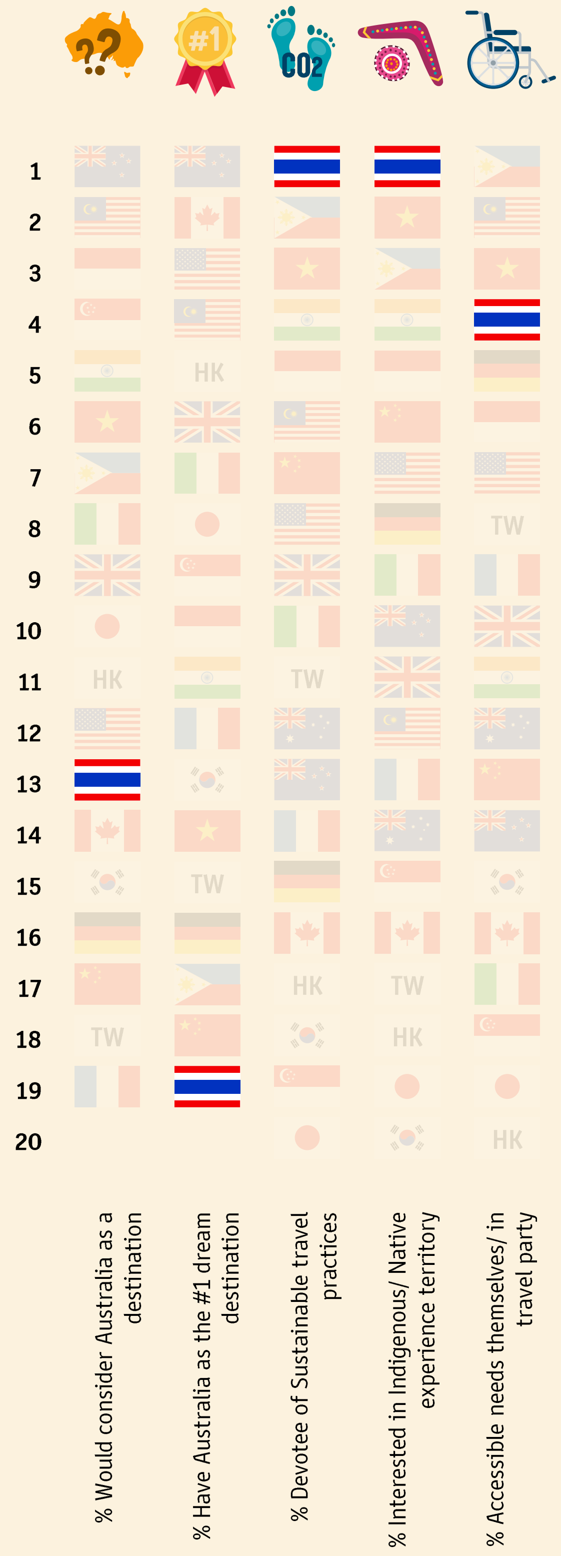
80 per cent of Thailand out-of-region travellers are interested in Indigenous experiences overall (36 per cent really want to do it, both metrics higher compared to the Global average). Thailand out-of-region travellers claim a strong interest and willingness to pay for many types of experiences in an Indigenous setting or with Indigenous people (such as long stay, aquatic and coastal, learning, wellness). However, there are concerns that it might be unsafe (a larger barrier compared to the Global average), as well as adding expense, and not understanding enough about it. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

1 in 4 Thailand out-of-region travellers have accessibility needs, which have a big impact across the travel experience, especially on accommodation (when compared to the Global average). These travellers are more likely to desire Adventure from their travel than travellers without accessibility needs.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 1 in 3 out-of-region travellers from Thailand and only 1 per cent have Australia as their #1 dream destination (consideration and aspiration is lower compared to the Global average). Australia is strongly associated with wildlife and recreation and outdoor, but these and other experience territories have weaker associations with Australia compared to the Global average. Australia is ranked 7th for natural environment, 23rd for food and drink and 13th for Indigenous (Indonesia/Bali, South Africa, and Vietnam lead here).



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY

VIETNAM

TRAVELLER PROFILES:

Vietnamese out-of-region travellers spend their vacations with a mix of companions, more often travelling as a family with adult children, with extended family or on organised tours, when compared with the Global average.

TRAVELLER NEEDS:

Vietnamese out-of-region travellers especially look forward to exploring new destinations, learning, and experiencing new things, getting in touch with nature and indulging and pampering themselves (compared to the Global average), as well as relaxing and escaping the pressures of everyday life and having fun. When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Vietnamese out-of-region travellers often travel for a range of needs: Into Nature, Exploration, Transformation (which is of higher demand compared to the Global average) and Adventure.

EXPERIENCE TERRITORIES:

There is high interest from Vietnamese out-of-region travellers in a range of experience territories (more interest across all territories compared to the Global average), with food and drink in most demand (which is higher compared to the Global average). Food and drink includes street food, unique or local specialties, fresh seafood, Indigenous dining, or food experiences (including a Chef's feast), tasting trails, meet the maker food/drink tours, winegrowing region visits, wine/beer pairings with food, bar hopping and food and drink festivals (all with more interest compared to the Global average). Vietnamese out-of-region travellers also express more interest in events and festivals compared to the Global average, and this includes Indigenous performance, dance/music festivals, carnivals, and other festivals as well as religious heritage/pilgrimages and religious events/festivals.

TRAVELLER NEEDS - SUSTAINABILITY:

Nearly 1 in 2 Vietnamese out-of-region travellers are devoted to several sustainable practices, see the importance in doing them and paying more for them, more so than the Global average. Older families are the most likely to be interested in and willing to pay more for sustainable practices. Vietnamese out-of-region travellers claim more motivators compared to the Global average and believe it brings benefits to Vietnamese travellers themselves (makes them feel better, personal joy and satisfaction, enjoyable experiences, travel without guilt), it secures experiences and destinations for future generations, it reflects how they behave in their day-to-day life and is the right and moral thing to do. The main barriers are limited options and the potential negative impact on the quality of their vacation (both are bigger barriers compared to the Global average). High Yield Travellers, who make up 18 per cent of the total Vietnamese out-of-region traveller market, believe that sustainable tourism is not important enough to do all the time or in all places.

EXPERIENCE WITH AN INDIGENOUS LENS:

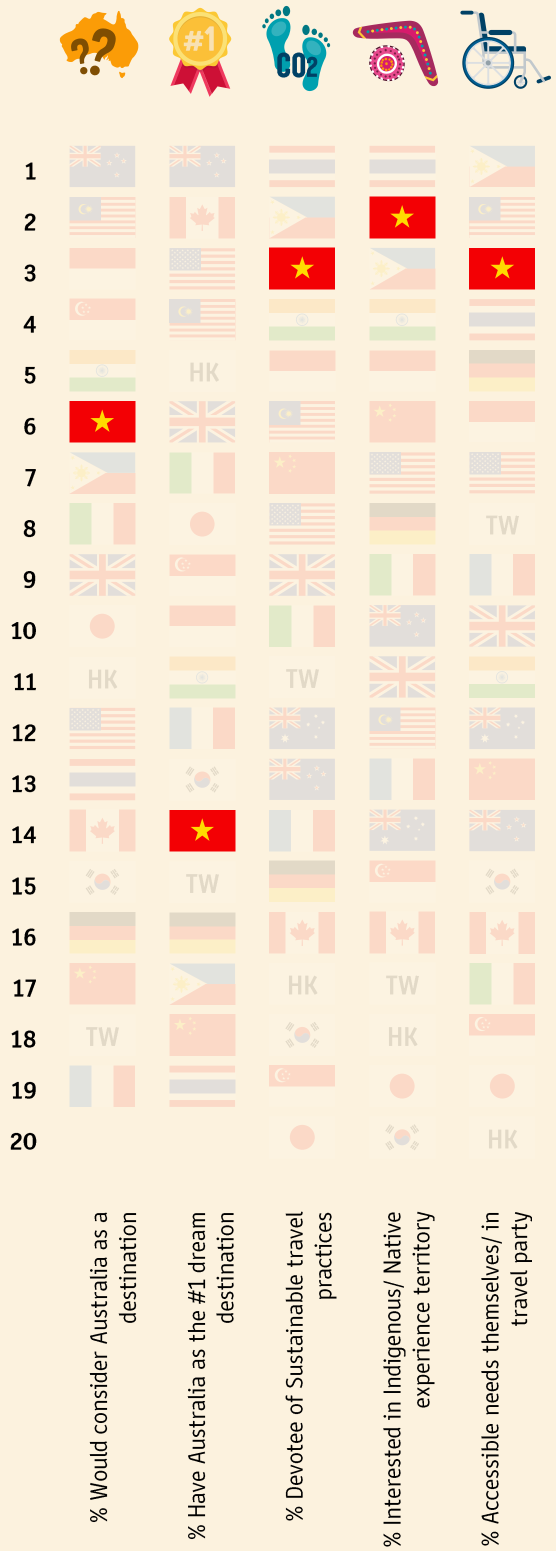
75 per cent Vietnamese out-of-region travellers are interested in Indigenous experiences overall (30 per cent really want to do it, higher compared to the Global average). Learning and food and drink experiences with Indigenous people or in Indigenous settings present interesting opportunities for Vietnamese travellers, and there is a higher willingness to pay for these and Indigenous experiences in other territories compared to the Global average. However, there are concerns that it might be unsafe, especially from High Yield Travellers, who worry about doing or saying something to offend. Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

1 in 4 Vietnamese out-of-region travellers have accessibility needs, which have at least some impact across travel experiences. These travellers are more likely to desire Adventure from their travel than travellers without accessibility needs, but food and drink remain the most desired experiences.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 44 per cent out-of-region travellers from Vietnam and 3 per cent have Australia as their #1 dream destination (behind Hawaii, the USA, Japan, Canada, South Korea, Singapore, and Thailand). Australia is associated with wildlife (rank 3rd) but is less strongly associated with other experience territories, especially food and drink (rank 23rd), events and festivals (rank 20th) and Indigenous (rank 11th, where South Africa, Malaysia, and Mexico lead).



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

MARKET SUMMARY TAIWAN

TW

TRAVELLER PROFILES:

Taiwanese out-of-region travellers spend their vacations with a mix of companions, more often travelling with friends or parents compared to the Global average.

TRAVELLER NEEDS:

Taiwanese out-of-region travellers especially look forward to relaxing, having fun, immersing themselves in different cultures and reconnecting with others (compared to the Global average). When it comes to Traveller Typologies (the motivations or needs that travellers are looking for when considering destinations and experiences), Taiwanese out-of-region travellers are most often travelling for Reconnection (which is of higher demand than the Global average) and Into Nature. Working Holiday Makers (who make up 7 per cent of the total Taiwanese traveller market) also travel for Adventure.

EXPERIENCE TERRITORIES:

There is high interest from Taiwanese out-of-region travellers in food and drink experience territories. Food and drink includes street food, unique or local specialties, a range of multicultural food options, Indigenous Chef's feasts, tasting trails, Indigenous food experiences, meet the maker food/drink tours, winery stays, wine/beer pairings with food, winegrowing region visits, wine/beer tasting tours and food and drink festivals (all with more interest compared to the Global average).

TRAVELLER NEEDS - SUSTAINABILITY:

Taiwanese out-of-region travellers place most importance on sustainable tourism practices that include respecting and preserving cultural heritage, protecting the land/natural environment, ethical treatment of animals and respecting and following cultural practices. Sustainable tourism is considered the right and moral thing to do and Taiwanese travellers want future generations to be able to enjoy the same experiences. Cost is the main barrier (a bigger barrier compared to the Global average) and as a result there is a reluctance to pay extra (willingness to pay more is lower compared to the Global average). Taiwanese travellers also claim they do not know how to identify if providers offer sustainable options. Greater availability and visibility of affordable options is important for Taiwanese travellers.

EXPERIENCE WITH AN INDIGENOUS LENS:

47 per cent Taiwanese out-of-region travellers are interested in Indigenous experiences overall (13 per cent would really want to do it, both metrics lower compared to the Global average). Wildlife, aquatic and coastal, natural environment, recreation and outdoors and food and drink present

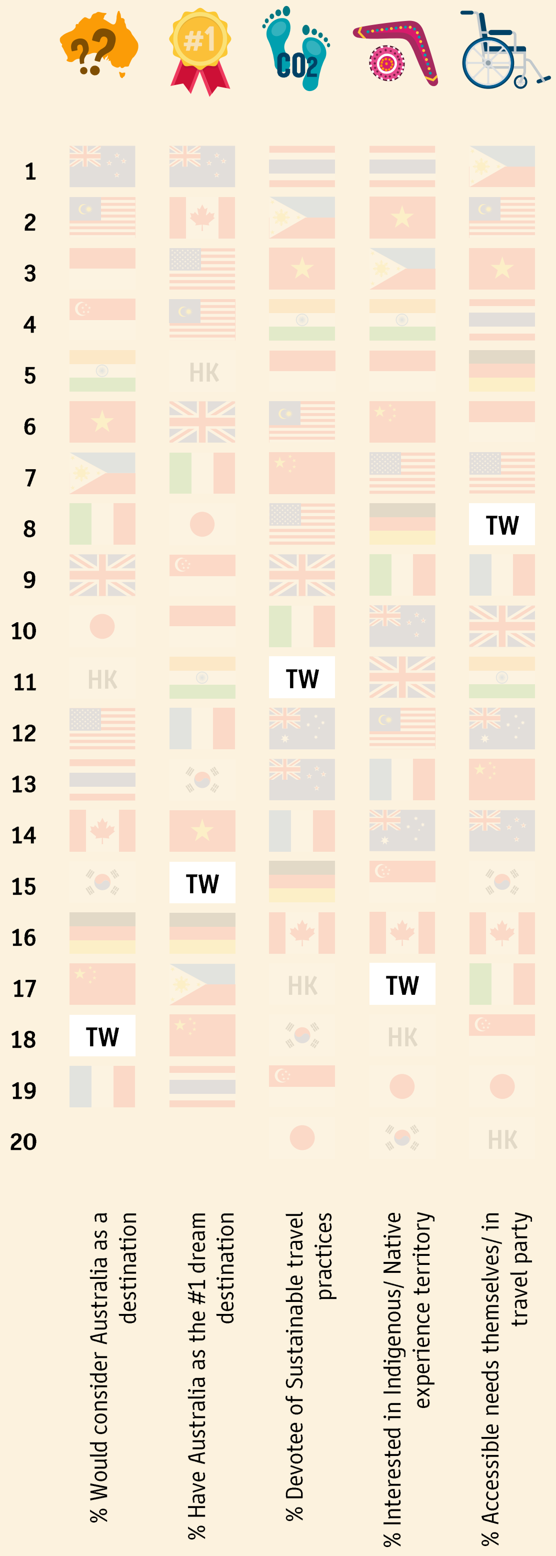
interesting opportunities for Taiwanese travellers. Concerns include not knowing enough, doing, or saying something to offend, hygiene and feeling unsafe. They are also less willing to pay extra for these experiences (willingness to pay more is lower compared to the Global average). Education and myth-busting is needed to drive interest.

TRAVELLER NEEDS - ACCESSIBILITY:

1 in 4 Taiwanese out-of-region travellers have accessibility needs, which has some impact across travel experiences (less impact compared to the Global average). There is little difference in experience demand of those travelling with accessibility needs versus those that are not.

OPPORTUNITY FOR AUSTRALIA:

Australia is considered by 1 in 4 out-of-region travellers from Taiwan and 2 per cent have Australia as their #1 dream destination (behind Japan, USA, Canada, Hawaii, China, South Korea, and Thailand). Australia is associated with wildlife and agritourism (both rank 2nd) but less strongly associated with food and drink (rank 25th). Australia is ranked #5 in destinations associated with Indigenous experiences, behind South Africa, Fiji, New Zealand, and Hawaii.



Visual description:
Comparative rank of market against other surveyed markets for Australia consideration and aspiration, sustainability consciousness, Indigenous experience interest and incidence of accessibility needs

APPENDIX

Outlined below are definitions of key terms referenced throughout this report.

Term	Meaning
Lifestage	A composite household lifestage, based on age and family characteristics.
Younger singles/couples	Aged under 45 with no dependent children.
Older singles/couples	Aged 45 years or older with no dependent children.
Younger families	Have dependent children aged up to 0-11 years old.
Older families	Have dependent children aged 12-18 years.
Tourism Australia segments	Traveller demand segments based on identifiable attributes of who and how they travel, including purpose of travel, length of stay and spend.
Out-of-region traveller	Travelled internationally outside of their home region in the past 3 years, or intend to in the next 2 years. Global out-of-region travellers refers to the average of this audience across 19 markets (excludes Australia).
High Yield Travellers	Tourism Australia's primary target audience, a high yield travelling audience defined by total or intended trip spend above the market average. Spend thresholds vary by market, defined by Tourism Australia's 2020 segmentation research.
Luxury Travellers	Actual or intended spend above AUD $1,000 per person per night.
Working Holiday Makers	Under 36 years who are considering or planning to take a working holiday. Note that in most cases, their past travel will not have been a working holiday, and this audience is also interested in other forms of leisure travel.
Long Stay Travellers	Actual or intended trip length over 30 days. Note that this is a broader audience definition, outside of Tourism Australia's core demand segments.
Traveller typologies	Distinct groupings of travellers based on the primary motivations or needs that travellers as individuals seek to fulfil through travel.
Reconnection	Travel to Reconnect, spend quality time with others, Relax & escape pressures of everyday life, Have fun & enjoy myself.
Into nature	Travel to Get in touch with nature, Relax & escape pressures of everyday life, To feel secure & comfortable.
Exploration	Travel to Explore new destinations, Learn & experience new things about the world, Immerse in a different culture/way of life.
Adventure	Travel to Have fun and enjoy myself, A sense of adventure, Meet new people & make friends.
Transformation	Travel to Focus on mental and/or physical wellbeing, Transformative experiences, self-discovery, growth, Indulge & pamper myself.
Passions, hobbies	Travel to Engage in an activity, hobby or passion, Indulge & pamper myself, Discover off-the-beaten-track places.
Restoration	Travel to feel secure & comfortable, Indulge & pamper myself, Have fun & enjoy myself.

Term	Meaning
Sustainability personas	A classification that divides the broad consumer traveller market into sub-groups based on a combination of the importance they place on sustainable tourism practices (number of practices rated as important) and their willingness to pay a price premium for sustainability (number of practices wiling to pay a little or a lot more, compared to a less sustainable alternative).
Devotees	Rate many sustainable practices as important (8-10 of 10 practices) and willing to pay extra for most/all (3-5 of 5 practices).
Believers	Rate a few/some sustainable practices as important (0-7 of 10 practices) and willing to pay extra for most/all (3-5 of 5 practices).
Focused	Rate many sustainable practices as important (8-10 of 10 practices) and willing to pay extra for 1-2 practices.
Dabblers	Rate a few/some sustainable practices as important (0-7 of 10 practices) and willing to pay extra for 1-2 practices.
Superficialists	Rate many sustainable practices as important (8-10 of 10 practices), but unwilling to pay for any practices.
Uncommitted	Rate a few/some sustainable practices as important (0-7 of 10 practices) but unwilling to pay for any practices.
Experience sector wheel	A visual representation showing consumer-led mapping of granular experiences to sectors or clusters, based on patterns of overlap in experience demand. This analysis was undertaken at a global (excluding Australia) level via triangulation of two data-led approaches (factor analysis and hierarchical cluster analysis).
Experience cluster	The 7 higher-order clusters within the centre of the experience sector wheel, including Heritage, Nature, Adventure, Sensory, Immersive, Interests, and Extended.
Experience sub-cluster	The 22 initial groupings of granular experiences, which subsequently ladder up to experience clusters. The sub-clusters that sit beneath each of the main experience clusters are as follows: Heritage: History; Indigenous Nature: Natural environment; Phenomena; Wildlife Adventure: Water-based; Land and sky; Exploration; Comfort camping; Journeys Sensory: Food and drink; Popular experiences; Wellness; The arts Immersive: Learning; Eco experiences; Agritourism; Personal journey Interests: Hobbies; Photography Extended: Travel+; Live like a local
Experience territory	15 broad territories tested for appeal and destination associations as part of the quantitative survey. (As the territory testing was undertaken before – and for a different purpose to – the experience sector mapping and creation of the experience sector wheel, note some differences in terminology and alignment between the two frameworks). The 15 territories tested include: Agritourism; Aquatic and coastal; Events and festivals; Food and drink; Heritage; Indigenous; Journeys; Learning; Local culture; Long stay; Natural environment; Recreation and outdoor; Hobbies; Wellness; and Wildlife. Each territory was supported with visual collages showing examples of global experiences to bring the territory to life for respondents and ensure consistent interpretation.

RESEARCH APPROACH OVERVIEW

Sustainability-conscious travellers (Devotees and Believers) are similar spenders than less e project design was based on a multi-method approach which included the following phases:

- Consultation phase.
- Cultural insights phase.
- Qualitative phase.
- Quantitative phase.

Each of these phases are described in greater detail in the following sections of this appendix.

Consultation phase

The consultation phase started in October 2021 and consisted of 3 parts outlined below:

Alignment workshop

An intensive inception meeting with Fiftyfive5 ensured a deeper knowledge of the context which led to the project brief, the objectives to be achieved and what success would look like at project completion. The purpose of the alignment workshop was to facilitate a two-way exchange of information and knowledge between Tourism Australia and Fiftyfive5, to ensure the project would deliver tangible value for Tourism Australia and the Australian tourism industry.

The alignment workshop was held on 11th November 2021 and covered:

- Discussion and agreement of the proposed approach and audiences.
- Identification of research and other sources to be reviewed in the subsequent project phase.
- Identification of stakeholders and discussion on how best to engage them in the process.
- Identification of potential problems or risks that may arise during the life of the project and discussion as to how these would be addressed or controlled.
- Quality assurance and controls for the project.
- Confirmation of reporting requirements.
- Agreement on the project timeline.

Review of existing Tourism Australia Research

A review of all previous research conducted by or on behalf of Tourism Australia as well as publicly available reports and publications were appraised by Fiftyfive5. This review laid the foundation of existing knowledge, to ensure the following phases of the project would build upon, rather than replicating, our existing sources of knowledge and insight. Tourism Australia worked closely with Fiftyfive5 to identify the scope of review, including materials relevant to the context of the study.

Summary of stakeholders consulted

State and Territory Tourism Organisations	All State and Territory Tourism Organisations (STOs) were consulted as partners throughout the research program. At the outset, each State and Territory Tourism Organisation was offered an in-depth consultation interview with Fiftyfive5 to discuss their priorities and focus areas, with a view to refining the scope and objectives of the project to meet key stakeholder needs. A total of 21 stakeholder representatives from across the Tourism offices of New South Wales, the Northern Territory, Queensland, South Australia, Tasmania, Victoria and Western Australia participated in this phase.
Tourism Australia	Internal stakeholder representatives based in Australia (cross-section of departments), Asia, the USA, the UK and Europe engaged in consultation phases through either the initial inception workshop or standalone in-depth interviews.

Cultural insights phase

In this phase of the study, insights that were collected from travel experts and a trove of new global data sources were fed through an artificial intelligence (AI) powered semiotic engine. The semiotic tool searched for patterns in the data to find literal, metaphorical, and emotional meanings throughout the findings. Pattern recognition technology was then applied, whereby the technology grouped meanings into territories which were then written up by in-house cultural insights specialists.

The combination of the processing power of AI, digital reach and human nuances to understanding of culture, helped provide a highly insightful breadth and depth of insights that would be unattainable by just one or the other. The outcomes of this phase helped define and refine the territories and specific experiences carried forward to consumer research testing.

Approach overview

Tourism Australia's existing priority areas (i.e. sustainability, Indigenous etc.) were used as a basis, and expanded upon based on initial desk and trends research. Fiftyfive5 populated the themes and sectors with a raft of related search terms, Instagram hashtags and Twitter handles, as well as a master list of international travel influencers (ranging from government bodies to travel operators and journalists - e.g. Robert Irwin, the Bucket List Family, Lonely Planet, Discover Tasmania etc.). All data created was then fed into the AI algorithm using the Signoi (www.signoi.com) platform.

Sample definition

The below table outlines how we harvested the Cultural Insights.

Google API metrics	Combined consumer search and news/blog presence of themes/terms… many billions over a 5-year period to understand trajectory of trends in the years preceding, as well as throughout, the pandemic.
Consumer social test	100,000 initial sample around 'travel', 'holiday' etc.
Influencers	130 key influencers - individuals and organisations. Led to 250,000 downloads and a focus on 156,000 of the most recent ones.

Qualitative phase

The qualitative objectives were:

- Exploration and understanding of the impact of COVID-19 pandemic on travel motivations, destinations, and experiences. Including an investigation of what has prevailed/changed, what types of destinations and experiences are relevant and why, and what experiences have lost or increased momentum post COVID-19.

- Further unpack and refine the emerging travel experiences and sectors developed through the Cultural Insights phase of the study – including what about each is or isn't appealing, specific experiences in demand, and the destinations around the world that travellers most associate with each.

- Understand perceptions of sustainability (what is its role in travel and what aspects and experiences are most important to travellers) and Indigenous experiences (e.g. understanding and awareness), including motivations and barriers for both.

- Explore perceptions of Australia (and competing destinations) as a travel destination, including Australia's performance across key experience territories.

Approach overview

The following is an outline of the approach undertaken during the qualitative phase of the study.

Discussion guides

Detailed interview guides were developed in close consultation with the Tourism Australia research team, with the guides being tailored to two audience types (English speaking and non-English speaking), with additional tailoring for the Australian market specifically.

Fieldwork

The qualitative fieldwork included:

- Six-day online communities in six English speaking markets with a total of n=144 participants (see table 'Markets included' for further details).

- For the four non-English speaking markets, there was a two-day pre-task for all n=96 participants followed by four focus groups in each market (see table 'Markets included' for further details).

Fieldwork was conducted between February and March 2022, with a total of n=240 participants across the ten markets.

The online communities were moderated by senior qualitative researchers, and the focus groups were conducted by specialist moderators for whom the language was their native tongue.

Review of existing Tourism Australia Research

Nine international markets were selected to provide a deep understanding of traveller demand and perceptions of Australia, as well as a domestic sample to understand the views of Australians.

The following table outlines the markets and number of participants that were included in the study, as well as the type of activities that participants completed.

Market	Number of participants	Type of activities
Australia	24 (23 complete and 1 incomplete)	6-day online community
New Zealand	24 (23 complete and 1 incomplete)	6-day online community
United Kingdom	24	6-day online community
United States	24 (23 complete and 1 incomplete)	6-day online community
India	24	6-day online community
Singapore	24	6-day online community
Germany	24	2-day pre-task and focus group
Korea	24	2-day pre-task and focus group
Japan	24	2-day pre-task and focus group
China	24	2-day pre-task and focus group

Sample definition

To maximise the relevance of the in-depth findings, the qualitative research was undertaken with a tighter audience of High Yield Travellers, Long Stay Travellers and Working Holiday Makers, as defined in the table below:

High Yield Travellers	All who had travelled for leisure outside their region in the three years prior to the research, AND/OR planned to travel outside their region in the following two years.
Long Stay Travellers	Those who had travelled during the three years prior to the research OR intended to travel in the following two years for four weeks or longer in duration.
Working Holiday Makers	Leisure travelers, under 36 years of age who would consider/were planning a working holiday, either in Australia or another destination.

In addition to the above criteria, all participants:

- Were residents in the relevant market, meaning they were born there and/or lived there most or all their lives.
- Were the main or joint travel decision maker for leisure travel.
- Had travelled out-of-region for leisure in the three years prior to the research and/or were planning to take an out-of-region holiday within the two years following the research.
- Were non-rejectors of Australia, meaning they would consider Australia as a holiday destination.
- Had previously spent above average (compared to the threshold for their market, as defined through previous Tourism Australia research) on holidays.

- Were a mix of ages between 25 and 65 years, split into younger and older age groups.

Respondents were recruited via a screening survey administered by specialist partners in each market and incentivised for their time.

Quantitative phase

he objectives of the quantitative phase of the project were:

- Quantify the emerging travel experiences and sectors developed through the Cultural Insights and Qualitative phases of the study.
- Explore and quantify post COVID-19 travel experiences and sectors (as identified in the Qualitative phase) that will attract the greatest demand for Australian tourism.
- Explore perceptions of sustainability (i.e. importance, value potential, motivations and barriers) and Indigenous experiences (i.e. importance, willingness to pay, appealing experiences and barriers).
- Further study perceptions of Australia (and competing destinations) as a travel destination.

Quantitative design

The following is an outline of the approach undertaken during the quantitative phase of the study.

Questionnaire design and cognitive interviews

The survey used for the online quantitative portion of the study was developed by Fiftyfive5 in close consultation with Tourism Australia. Once the questionnaire was drafted, Fiftyfive5 undertook cognitive interviews with a selection of international travellers to qualitatively 'stress test' the survey. This was to ensure the language was easy to understand and interpret, as well not being leading or inciting. Once this step was complete, the online surveys were programmed and tested comprehensively before commencing fieldwork.

Local language surveys were also reviewed as part of the translation and checking process once they were converted online.

The final questionnaire contained seven sections:

I. Screener – Covered basic demographic questions needed to ensure quotas were being appropriately filled and the correct respondents were completing the survey.

II. General Travel – Contained questions related to typical travel (i.e. accommodation, party, accessibility needs etc.).

III. Destination Equity – Looked at past visitation, destination consideration and intention.

IV. Experiences – Explored the binary interest of experiences and influence on destination etc.

V. Destination Drivers – Ranked importance, destination positioning and most strongly associated.

VI. Sustainability and Indigenous tourism – Importance, willingness to pay, motivations, barriers.

VII. Demographics – Covered the remaining profiling demographics not included in the screener section.

Fieldwork partners

The fieldwork partners used for this research project were Parallel Data for programming and Dynata as the panel partner. Dynata is the world's largest first-party data company, and they ensured that respondents were recruited from a national representative panel in each market.

Respondents were incentivised through Dynata's standard rewards and to ensure anonymity, both Parallel Data and Fiftyfive5 remain blind to respondent's personal details.

Fieldwork

Fieldwork for the survey was conducted between 22 April and 17 May 2022.

At an overall level there were n=23,771 completed surveys across 20 markets (including Australia) and four segments. The below table outlines the final number of completes across these categories.

	OUT-OF-REGION TRAVELLERS	HIGH YIELD TRAVELLERS	LUXURY TRAVELLERS	LONG STAY TRAVELLERS	WORKING HOLIDAY MAKERS
Australia	1,543	809	78	172	57
UK	1,643	403	20	72	108
NZ	1,565	688	133	127	105
India	1,563	355	103	74	289
China	1,555	722	195	17	120
USA	1,500	604	81	65	43
South Korea	1,220	204	40	52	124
Japan	1,168	228	59	15	80
Italy	1,161	246	8	35	64
France	1,159	154	4	61	81
Germany	1,134	288	18	36	83
Singapore	1,046	396	67	26	51
Malaysia	1,039	152	24	60	138
Canada	1,032	423	30	62	12
Hong Kong	1,017	473	112	41	86
Indonesia	1,006	151	41	25	183
Taiwan	1,005	224	22	17	74
Philippines	838	94	34	58	99
Thailand	828	143	37	69	145
Vietnam	749	133	25	45	81
Global excl. AU	23,771	6,890	1,131	1,129	2,023

The online survey took on average 20 minutes to complete in English.

Quality control and data management practices were undertaken to ISO 20252 accreditation standards, with measures in place (i.e. privacy policy, trigger warning, and closing message) to reduce issues associated with survey participation.

Sampling

All respondents during the quantitative phase were aged between 18 and 65 years at the time of completing the survey and had either travelled out of their region for leisure in the three years prior to the survey and/or were planning to take and out-of-region holiday within the two years following the study.

Respondents were reported on at an overall level and split by Tourism Australia's segments, as defined in the table below:

High Yield Travellers	Actual or intended trip spend above the market average
Luxury travellers	Actual or intended spend above $1,000 AUD per person per night
Long Stay Travellers	Actual or intended trip length over 30 days
Working Holiday Makers	Under 36 years considering or planning to take a working holiday

Weighting approach

A weighting scheme was developed and applied to the final data set to ensure it is representative of out-of-region travellers in each market.

A nationally representative sample of people living in each market was captured, these respondents were asked questions about their travel behaviours and intentions in order to identify which were out-of-region travellers. The profile of out-of-region travellers based on Gender and Age was then used as the primary weighting scheme for each individual market.

A further weight was then applied so that each market contributes equally to global aggregate analysis, negating the impact of sample size differences.

Sizing approach

This market sizing analysis used pre COVID-19 trip volumes projected forward using survey responses from out-of-region travellers and adjusted to account for the impact of COVID-19. This allowed us to align out-of-region travel populations (numbers of people) to known out-of-region trip volumes (numbers of trips) with reasonable adjustment to represent a COVID-19-free potential. Sources referenced for this analysis included 2019 out-of-region trip volumes sourced from Oxford Economics, (aged 18-64) trip proportions sourced from Australian arrival figures, level of COVID-19 impact from Oxford Economics out-of-region trip volumes 2017-2021, an implied ratio of Annual Travel Population to Five Year Travel Population and this research.

Calculated in this way, the estimated target population is defined as the estimated number of travellers (aged 18-64) from 19 international markets to any out-of-region destination, in any given (non-COVID-19) year. Our market sizing estimates this as a population of 124.8 million travellers, broken down across the 19 markets.

Although the calculation of market sizing was designed to account for COVID-19 impacts, the sizing estimates are nonetheless likely to represent slight underestimates due to residual COVID-19 influence. This is particularly the case for target audience segments, where sizing was extrapolated from incidence within the general out-of-region traveller sample based on claimed recent or intended travel behaviours.

The total addressable market for any given experience or cluster is the estimated subset of this population who are interested in a particular experience or cluster of experiences. While this represents the opportunity pool for the global audience, overlaying destination consideration or Australia's current market share can help understand the potential for Australia specifically.

Note also that the calculated sizing estimates are intentionally conservative to err on the side of caution during this high-risk recovery period.

TOURISM AUSTRALIA

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