

Consumer Demand Project 2019 USA Market Fact Sheet



Current USA Visitation and Expenditure in Australia¹

USA visitation grew by 4.7 per cent to 771,000 in the year ending September 2019, with Overnight Visitor Expenditure (OVE) in Australia up 11.4 per cent to \$2.0b across the same period. Visitors stayed for 13.2m nights, up 0.9 per cent year-on-year.



\$2.0b spend
+11.4% year-on-year



771,000 visitors
+4.7% year-on-year



13.2m nights
+0.9% year-on-year

Factors of importance when choosing holiday destination

Safety and security and natural beauty and wildlife are the two most important factors to American travellers when choosing a holiday destination.

Top five importance factors

% ranking each factor in their top five most important



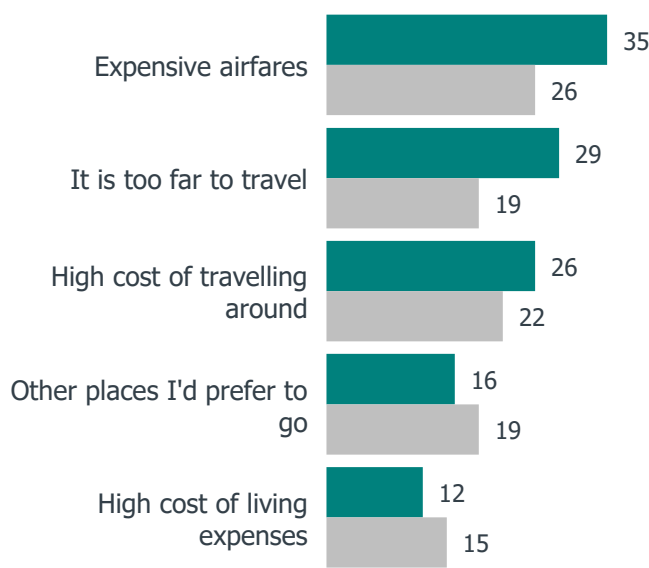
% US travellers (%) 11 Market total²

Barriers to visiting Australia

Expensive airfares and a perception that travel to Australia is 'too far' are the biggest barriers for American travellers. These barriers are disproportionately important for Americans as compared to travellers in other markets.

Top five barriers to visiting Australia

% of those not intending to visit Australia



■ US travellers ■ 11 Market total²

Research Background

The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012. This involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. Beginning in 2016, Tourism and Events Queensland and other State Tourism Organisations (STOs) have partnered with Tourism Australia for the project.

Source: Tourism Research Australia Consumer Demand Project (CDP) 2019

¹ Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)

² Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

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Current USA Visitation and Expenditure in Queensland¹

Overnight visitor expenditure from the USA market in Queensland grew by 11.5 per cent to \$422.2m in the year ending September 2019. During the same period, visitation increased by 5.0 per cent to 239,000 and nights was up by 6.8 per cent to 2.7m.



\$422.2m spend
+11.5% year-on-year



239,000 visitors
+5.0% year-on-year



2.7m nights
+6.8% year-on-year

Competitive purchase funnel

The funnel shows traveller attitudes to destinations throughout the travel planning cycle. Amongst Australian states and territories, Queensland ranked second highest amongst American travellers for consideration, experience awareness, visitation and intention to visit.

Queensland's competitive rankings³

ranking against other state and territories by market

	INDO	NZ	SIN	MAL	KOR	JAP	CHI	IND	GER	USA	UK
Consideration	2	1	1	2	3	1	1	3	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Experience awareness	3	1	2	1	3	1	2	2	1	2	2
	3	1	1	3	1	1	2	3	1	2	2
Intention	3	1	1	1	2	1	1	2	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Visitation (YE Dec 2018) ⁴	4	1	4	4	2	1	3	3	2	2	2
	4	1	4	4	2	1	3	3	2	2	2

■ 2018 rank ■ 2019 rank

How to read this:
American travellers rank Queensland 2nd out of Australian states and territories for consideration

Australia's competitive rankings - USA market

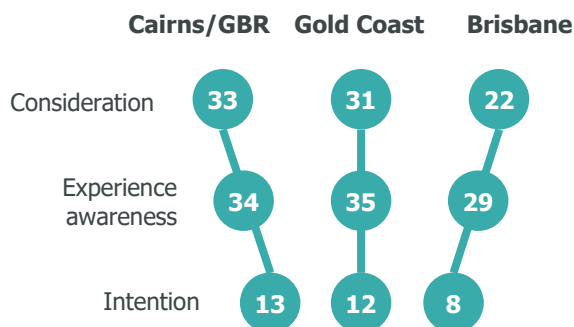
ranking against other international destinations



How to read this: Australia comes 8th in the list of destinations American travellers intend to visit, but ranks 22nd in terms of actual visitation

Queensland destinations - USA market

% of travellers considering Australia



How to read this: 31% of American travellers considering visiting Australia have considered visiting the Gold Coast, but only 12% intend to actually visit

¹ Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)
² INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany
³ INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany
⁴ Tourism Research Australia, International Visitor Survey, Year Ending December 2018 (CDP visitation based on December data)

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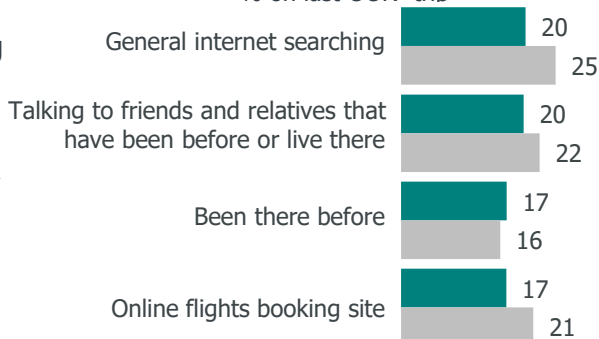
Sources for travel planning

American travellers use a variety of sources for trip inspiration, with general internet searching and talking to friends and relatives who have been there before the most common.

Flights, tours and accommodation are most commonly booked online, either directly with the airline/operator or using a travel website/app.

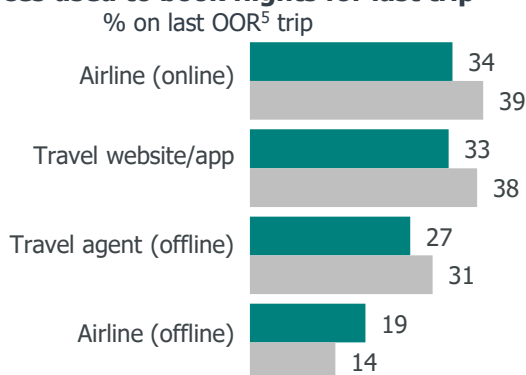
Sources of inspiration for last trip

% on last OOR⁵ trip



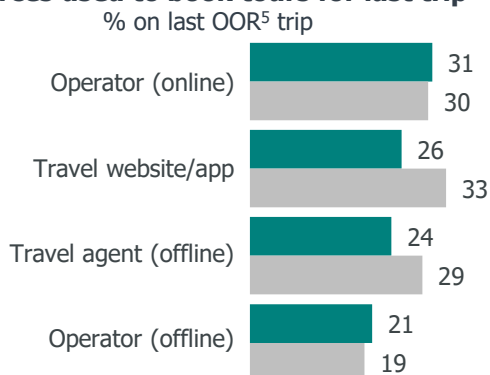
Sources used to book flights for last trip

% on last OOR⁵ trip



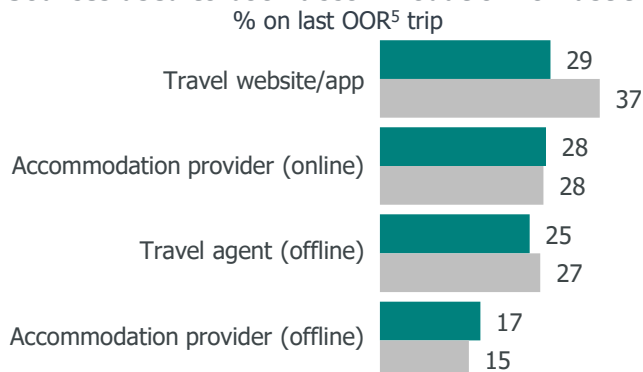
Sources used to book tours for last trip

% on last OOR⁵ trip



Sources used to book accommodation for last trip

% on last OOR⁵ trip



■ USA travellers

■ 11 Market total²



² Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

⁵ OOR Trip – Out of Region Trip (American travelling outside Canada/USA/Mexico/Caribbean)