

Understanding the Indian high value traveller

OCTOBER 2024

TOURISM TASMANIA

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Background

India has been identified as a **key international market** for tourism, with the Indian travel market predicted to **grow at one of the fastest growth rates** over the next few years.

India has also **bounced back** particularly well from the **pandemic** compared to other markets.

We know that **Australia is a top destination** visited by Indian travellers. However, Tasmania does not often make it onto their trip itinerary.

This report seeks to explore how Tasmania can **attract high value Indian travellers** that will yield the greatest opportunity for gaining incremental visitor spend.

We know that Indians have emotive motivations to make splurge purchases; to achieve comfort and relaxation. These are motivations that travel can tap into, unlocking greater spend potential



According to Deloitte, recreation, entertainment, and leisure travel represents **15%** of the estimated monthly spend of Indian high income earners vs **9%** of Australian high income earners. The median amount of their last splurge purchase was **INR2,500** (44 AUD) vs **\$50** for Australian high income earners.

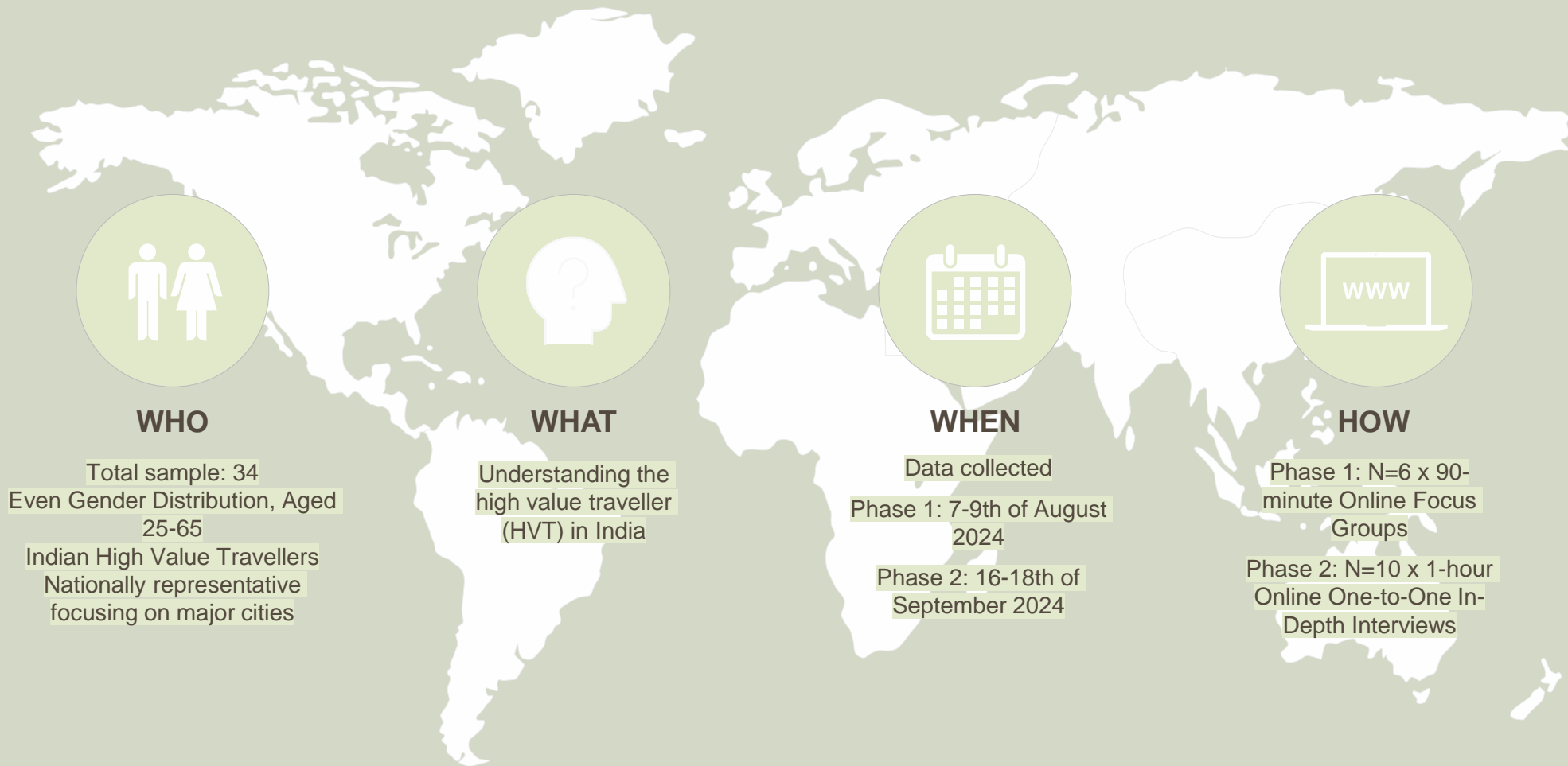
Top three drivers of joy purchases	
India	Australia
Comforting (16%)	Comforting (25%)
Relaxing (14%)	Relaxing (17%)
Satisfying a personal passion/hobby (12%)	Practical or useful (12%)

To attract **high value Indian travellers** to Tasmania, we need to ensure we have a deep understanding of their **travel motivations, needs, barriers and current behaviours...**

Quantitative Methodology



Qualitative Methodology



Executive Summary

Quantitative Executive Summary | Indian HVTs prioritise experiences that enable connection to nature, the local culture, food/drink, and people

Who are our HVTs?

Our HVTs are English and Hindi speaking families (4 in 5) who are frequent international travellers.

They are most likely to travel as a family unit or with their partners and when travelling to Australia in the past, stay on average around 2 weeks.

Our Indian HVTs prioritise experiences that enable connection to nature, the local culture, food/drink, and people and want once in a lifetime experiences.

They prioritise sustainability and strongly believe their actions can impact the world around them.

Where does Tasmania currently sit in their sphere?

Tasmania is currently a relative unknown for most Indian HVTs with only 1% of people mentioning the destination spontaneously.

Activities associated with connecting and exploring have the strongest link to Tasmania overall, however, there is a weaker connection between Tasmania and nature and food/beverage activities, key drivers for these travellers.

What are the opportunities for Tasmania?

Unique nature and wildlife as well as food and drink are fundamental drivers to travel with our Indian HVTs no different.

Any activity should focus in on this content to be most efficient at cutting through but ease and accessibility needs to be stressed in order to attract travellers who are less familiar with the destination as a whole. When showcasing food, ensure there is a variety of options, including vegetarian/vegan to accommodate for all cultural and lifestyle backgrounds.

How best can Tasmania leverage this market?

Tasmania's focus needs to be on driving awareness for the destination as part of travelling within Australia. Our Indian HVTs are considering Australia as a destination regardless but we need to ensure the linkage between Australia and Tasmania is strong whilst also highlighting our differences which make us a drawcard to travel while here.

Sustainability also represents a unique proposition for us as a destination and has strong appeal amongst this group.

To be most efficient when communicating, leverage social media/online as well as including group travellers in any consumer facing comms.

Qualitative Executive Summary (1/2) | HVTs are passionate travellers that seek out cultural connection and see travel as a means to broadening their perspective on life and the world around them

They see travel and experience as valuable

More than just getting away from the day to day, HVTs value travel as a means of personal growth and a way to improve their lives

Family and community is important

Feeling connected, travelling with friends or family, HVTs value their community

They also seek to connect with the communities they travel to. Authenticity and understanding locals increases their enjoyment

Enjoyment is core to their needs

Travel is there for enjoyment, to get the most out of their time away and fill their emotional cup

So, they seek out experiences and destinations that can deliver to this

Quality, comfort and luxury are important

Synonymous with enjoyment and getting away from the norm, HVTs desire experiences, accommodation and travel that is high quality and feels indulgent

Happy to spend more on the things that are important to them and their travel party

Food is culturally important

Food and sharing food culturally is important, but with a high vegetarian/vegan population it has practical importance too – if they are concerned, they can't be catered for this can be a deterrent

Food experiences are also seen to enable HVTs to understand a culture more. Dining experiences are high on the priority list when it comes to planning

Qualitative Executive Summary (2/2) | Opportunity to better engage HVTs with Tasmania through education and elevation of Tasmania's unique natural wonders, sustainable practices and differentiated climate

Natural beauty and connection appeals

Imagery of Tasmania that shows the beautiful landscapes and greenery have high appeal

Wild and natural there is high appeal in the pristine and unpopulated

Unique climate and landscapes

Highlighting Tasmania's differentiated climate (from India and Mainland Australia) is attractive

Snow, cold, and wilderness showcase a place that is unexpected in the context of Australia and offers a different experience from India

Distinctive wildlife that can be experienced close up

HVTs are keen to see the local wildlife and learn about them from locals

Immersive wildlife experiences cut through, especially where animals are local to the area or experiences allow for greater connection with the wildlife

Local produce and high-quality food experiences

Showcasing local produce and highlighting quality is a key consideration for choosing a destination

Reinforcing the range of options available is important so HVTs understand their needs can be met... and the local produce will deliver to their love of a food experience

Communicate ease of access so support consideration

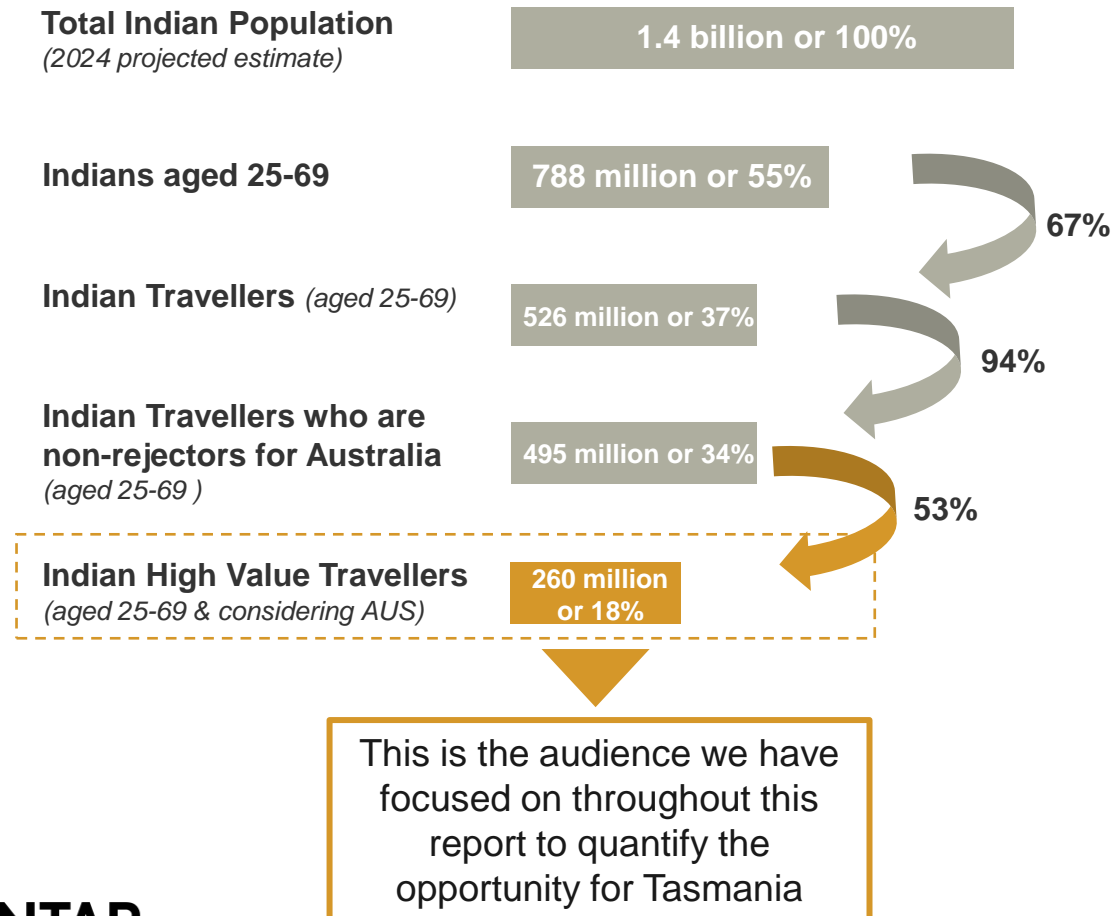
Education around location and ease of access will help HVTs see how to include Tasmania into their travel arrangements

Combining ease of travel with differentiated features from mainland Australia will be key to driving greater consideration

Sizing the opportunity

Sizing the opportunity in India

Size of the high value traveller population in India



Reminder of our audience definitions



Travellers

- Regularly travels internationally for a vacation for at least one or more nights (at least every 2 years)
- Looking to travel internationally for a vacation in the next 2 years
- Decision maker (sole or joint) for planning vacations



High Value Travellers

- Meets the Traveller criteria plus:
 - Is from a high income household (SEC A classification in India)
 - Has a higher propensity to spend on international travel
 - Will spend more than \$90AUD per night on accommodation per person per night on a vacation in Australia
 - Will spend more than \$180AUD on activities per person per day on a vacation in Australia

Sizing the opportunity in India

Spend (\$AUD) Last trip to Australia

High Value Indian Travellers spent

\$7.9k

per person per trip (excluding flights)

That's equivalent to...

90%

of the average monthly household income for HVTs

Which, accounting for # of trips*, it equates to...

\$1.5 bn

being spent by Indian HVTs annually on trips to AUS



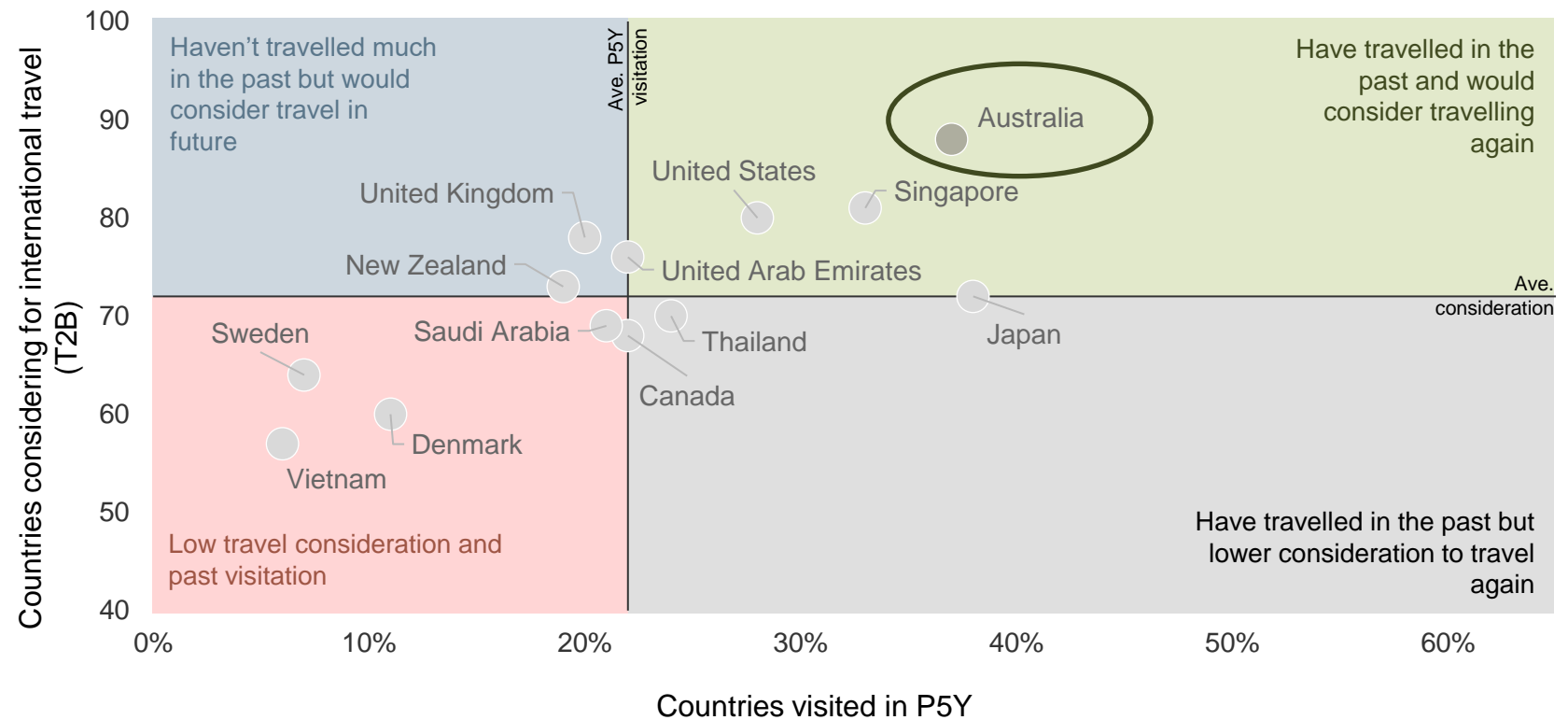


Australia is a strong drawcard for Indian HVTs, representing the highest consideration compared to other destinations from around the world. For Tasmania, the focus should be to influence these travellers to pick Tasmania over other states/destinations once here

TRAVEL POTENTIAL



A third of our HVTs claim to have visited Australia more than once. We also see a relatively strong relationship between past visitation and future intent, meaning that past travel is not a barrier for future travel.



Understanding who our HVTs are



Photo credit: Yogendra Singh

HIGH VALUE TRAVELLERS

SIZE

18%

or

260m people

% of Indian population

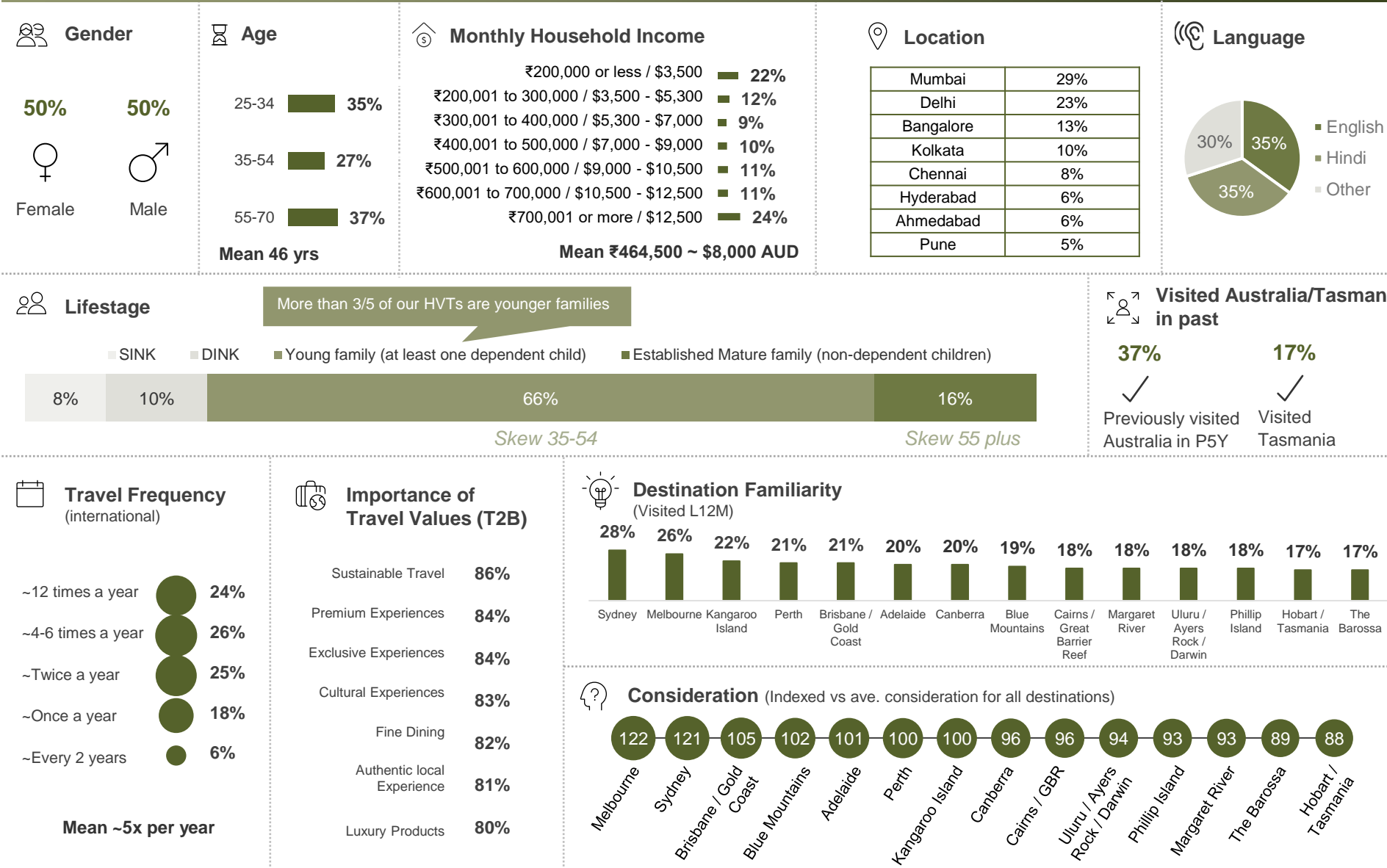
SPEND: \$7.9k (AUD)

(PER PERSON, PER TRIP – EXCL. FLIGHTS)

VALUES:

Indian HVTs prioritise experiences that enable connection to nature, the local culture, food/drink, and people. They prioritise sustainability and strongly believe their actions can impact the world around them. They are most likely to have younger children and travel as a family when vacationing.

DEMOGRAPHICS & BROAD TRAVEL BEHAVIOURS



Location

Mumbai	29%
Delhi	23%
Bangalore	13%
Kolkata	10%
Chennai	8%
Hyderabad	6%
Ahmedabad	6%
Pune	5%

Language

30%

35%

35%

English

Hindi

Other

Lifestage

More than 3/5 of our HVTs are younger families

SINK

8%

DINK

10%

Young family (at least one dependent child)

66%

Established Mature family (non-dependent children)

16%

Skew 35-54

Skew 55 plus

Visited Australia/Tasmania in past

37%

✓

Previously visited Australia in P5Y

17%

✓

Visited Tasmania

Travel Frequency (international)

~12 times a year

24%

~4-6 times a year

26%

~Twice a year

25%

~Once a year

18%

~Every 2 years

6%

Mean ~5x per year

Importance of Travel Values (T2B)

Sustainable Travel

86%

Premium Experiences

84%

Exclusive Experiences

84%

Cultural Experiences

83%

Fine Dining

82%

Authentic local Experience

81%

Luxury Products

80%

Destination Familiarity (Visited L12M)

28%

Sydney

26%

Melbourne

22%

Kangaroo Island

21%

Perth

21%

Brisbane / Gold Coast

20%

Adelaide

20%

Canberra

19%

Blue Mountains

18%

Cairns / Great Barrier Reef

18%

Margaret River

18%

Uluru / Ayers Rock / Darwin

18%

Phillip Island

17%

Hobart / Tasmania

17%

The Barossa

Consideration (Indexed vs ave. consideration for all destinations)

122

Melbourne

121

Sydney

105

Brisbane / Gold Coast

102

Blue Mountains

101

Adelaide

100

Perth

100

Kangaroo Island

96

Canberra

96

Cairns / GBR

94

Uluru / Ayers Rock / Darwin

93

Phillip Island

93

Margaret River

89

The Barossa

88

Hobart / Tasmania

While there are commonalities across HVTs we did uncover differences across life-stage and travel purpose that influence how they travel and their needs



Families travelling for holidays

Kids are more involved in decision making and considerations

Options for all are important – close by and easily accessible

Safety for the family is a higher priority



Families travelling to visit relatives/friends

Greater focus on groups, connections and greater onus on the host family to provide information and support



DINKs travelling for holidays and visiting friends/ family

Immersing in local experiences and enjoying their experience are top of mind

They have worked hard and want to make the most out of their time away



SINKs Travelling with friends

Groups travelling together there is a greater need for coordination, compromise

Ensuring everyone gets to see what they want to, while also allowing for spontaneity

Meet Samir & Family

Family travelling for Holiday Vacation

Adventure loving

Authentic Traveller

Independent

Culturally Curious

Safety seeking

Hello I'm Samir. I live in Mumbai with my wife and my two adult sons aged 20 and 22. I work as the General Manager of a manufacturing company.

I consider myself to be on a spiritual journey and as I grow older I am more mindful of protecting our beautiful earth. I have recently become a vegetarian for environmental reasons.

My family love to travel together as a family at least once a year. My sons do a lot of the legwork when it comes to research and making bookings online. They use YouTube and Instagram, and then book via the online portal, usually Makemytrip.com

Australia is the next destination on our bucket list and we're planning a self-driving tour. I am drawn to the calm and peaceful environment and enjoying the stunning natural beauty which can be a spiritual experience.

Spending and Splurging | Comfort, safety and great dining experiences are worth spending more on. For older families especially, comfort becomes more important

Dining experiences | Quality vegetarian and family friendly options

Looking for high quality and variety when it comes to vegetarian/ vegan options

Ensuring there are interesting foods to meet the whole family's needs

Activities | Natural beauty and taking time to explore

Families want to have things booked in, but they also want to explore on their holiday at their own pace. Seeking options, but without over-doing it

When they are travelling as just a small family unit, they can be a bit more considered with where they go and how long they stay

Getting out in nature and seeing the natural beauty of a place is important

Accommodation & logistics | safety and security are more important than luxury

Seeking good quality and comfortable accommodation that is convenient for key sightseeing locations. Luxury is not necessarily expected but quality, clean and safe are top priority

Happy to hire a car and self-drive so the family can explore at their own pace

Sustainable options and offers cut-through

There is a greater focus on sustainable options and engagement with this group

From accommodation to activities, they are willing to spend a little more to reduce their impact

They have a sense of care and concern for the environment and world around them and seek out places that match their values

Agent always push their packages, it's not customised enough, they try to push too many things in too short a time, I don't want to do 8 things in a day, I like 2-3 spaced out. We have our own rental car and can choose when to spend time and explore

– M, Gen X, Visiting Family

Okay, so it caters to kids, it caters to adults, it gets. Caters to whatever activities you have. Travel activities, have adventures, you have zoos, you have things that you can do. You can do a lot of fine tasting. You can go in culturally, it's ridiculous. In dining and wining, fine dining you have street foods, you have. So, I think it's a complete whole package for you.

- F, Millennial, Holiday Travel

Appeal and consideration of Tasmania | The natural wonders, adventure and ability to slow down all appeal to this group



Drivers to consider Tasmania

- Beautiful scenic attractions and untouched nature
- Sustainable and eco-tourism opportunities
- Authentic, peaceful people and a lack of crowds
- Outdoor activities such as nature hikes, wildlife sanctuaries, bike riding and unique attractions such as the Southern Lights

Barriers to consider Tasmania as a destination

Concerns around safety and security; assumption Tasmania will be quiet and fairly safe, but they seek more research to be sure

Concerned around safety when driving, knowing the road rules and whether it is safe to drive at night

Unsure about the location of natural attractions, the distances involved and how many days needed to spend in Tasmania

"I have to be well aware of the safety as well. for my family...I believe safety is a little bit of a concern for [Tasmania], probably since it's not too crowded and a little bit out of place. So, that could be a concern"

- M, Millennial, Visiting Family

Meet Anjali & family

Family travelling to visit family & friends

Discerning

High expectations

Luxury experiences

Local 'must dos'

Seeks service



Hello I'm Anjali. I live in Delhi with my husband and 8yo daughter who is our little princess. I am a homemaker and my husband works in finance.

We love to travel and give our daughter unique experiences, and she has developed a taste for luxury! My husband has a busy job so we need to pack a lot of activities into a short amount of time when we travel.

When planning a trip I talk to friends and family to find out the 'must do' activities so I can make sure they're on my list. Then I get my travel agent to organise and book everything for me. They can ensure I can get the best price, and they know what I expect in terms of quality of accommodations. I can also get an instant answer and good customer service when I need it.

We're travelling to Australia next to visit family that live there. We'll be going on day trips with family but we won't stay with them as my daughter only prefers to stay in 5 star hotels or above.

Spending and Splurging | Luxurious elements and activities with social currency are a top priority when it comes to spending while visiting family/ friends

Dining experiences | Treating family and trying the famous local dishes

Expectation family will provide suggestions for the best restaurants to visit, and as the visitor they will treat everyone to meals in most cases

Things such as wine tasting and enjoying local delicacies; such as cheese platters and seafood.

Tasting dishes that a location is famous for is worth spending on; e.g. Tasmania is famous for having superior oysters so this would be top of the list

Activities | The 'must do's' and bucket list items

Activities which are unique and famous to the location and have social currency attached to them

Enjoyable activities for the kids and the family to do together

The Australian family will accompany them on day trips and do some driving

But they will also seek out unique and interesting experiences to do on their own

Accommodation & logistics | Mainstream luxury hotels and private drivers and guides if needed

Where accommodation is needed beyond staying with family and friends there is a desire for mainstream luxury - 4 or 5 stars and conveniently located to visit well known attractions

Hiring a driver or local tour guide is also considered important to ensure they are getting to see what they want to

Some things are must do. For example, if you go to Bali, everyone knows about the Bali swing. So, you must do it because everyone will ask you what you did and what's the point of going if you don't do it?

- F, Millennial, Visiting Family

My daughter can only stay in 4 plus star hotel, she doesn't want to stay with relatives. Australia is definitely luxurious; all the major chains are there

- F, Millennial, Visiting Family

Appeal and consideration of Tasmania | An expectation Tasmania will be family friendly and offer a variety of experiences; though desire for luxury and high levels of service may temper appeal



"I think [Tasmania] has a combination of everything, you can find baches there and adventurous stuff there too. Then you can also chill with you family and experience wildlife...it would be fun for my family to travel there" - F, Gen Z, Holiday

Drivers to consider Tasmania

- Something for everyone in the family; a wide choice of activities and dining on offer
- 'Must do' activities which are unique to Tasmania and can be a talking point with family and friends
- Availability of child friendly activities such as up-close wildlife experiences
- Unique and instagrammable experiences such as Aurora Australis, wildlife encounters

Barriers to consider Tasmania

Limited understanding of what Tasmania has to offer in the way of mainstream luxury such as high-end hotels, but also in terms of activities and getting around

Recommendations from family/ friends they are visiting are important so if they are not encouraging travel to Tasmania this may deter this group

Meet Indira & Arjun

DINKS travelling to visit friends

Adventure loving

Romantic

Work hard, play hard

Immersive experiences

Safety considerers



Hello, we're Indira and Arjun. We live in Mumbai where we run our own homewares business. Our work life can be very busy so when life gets too stressful we think about planning a holiday!

We work hard and play hard; we love adventure activities and have recently tried hang gliding.

Our next trip is to Australia where we'll catch up with friends who have recently moved there.

We're keen to try all their local recommendations and enjoy all that is on offer. We love spending time with our friends while there, but also want to make sure we have some time to ourselves to explore as well

Spending and Splurging | Exciting activities, foodie adventures and romantic dinners out alone or with friends

Dining experiences | Enjoyable and interesting dining experiences that can be shared

Local breweries, distilleries and wineries, high quality local produce

Indulging in food experiences that have atmosphere and ambiance

Places that feel special and add to their holiday and also enable them to spoil their hosts

Activities | activities that tap into their adventure mindset

Adventurous experiences that are fun and active - something different and memorable

Things they would not usually do at home

Activities that let them explore places more deeply and connect with nature as well

Accommodation & logistics | comfortable, well located and quality accommodation

Close to local areas where activities are being run

When not staying with friends/ family nice accommodation is a priority and they are likely to spend more

Hotels, definitely. Hotels. I wouldn't like, always choose luxury. But of course, luxury is a part of my life. If it's a very nice hotel, like I would like, just want to go, I wouldn't think twice before doing it because I'm not going to go there back again, but where it's not required, I would choose like a little less expensive place. But I wouldn't like let go of my comfort when it comes to hotel and accommodation.

- F, Gen Z, Holiday Travel

When we travel, we want to explore, do different kind of things. Skiing, paragliding, scuba diving, all of these things.

- F, Millennial, Visiting Family

Appeal and consideration of Tasmania | outdoor and adventurous activities that connect people to nature and wildlife hold appeal



"When I was searching for a trip to Australia, Tasmania was also shown. They showed the Franklin river where you can do adventure [experiences], like river rafting and diving. It will be a combo of luxury as well as adventure, exploring the nature, which I'm fond of. SO, it will be like a three in one for me" - F, Millennial, Holiday Travel

Drivers to consider Tasmania

- Rugged wilderness
- Opportunities for adventure activities; hiking, climbing, boat trips and even extreme activities such as paragliding or bungee jumping
- Wildlife experiences that are unique
- A safe place with fun and friendly people

Barriers to consider Tasmania

Uncertainty about safety arrangements due to limited exposure or information about Tasmania's security measures

Perceived similarity to mainland Australia: unclear what Tasmania has to offer that is a significantly different experience from other Australian destinations they have visited

Meet Prisha

Sink travelling for vacation holiday

Social

Keen shopper

Culturally curious

Fun seeker

Spontaneous



Hello I'm Prisha. I live in Delhi with my parents and grandparents. I work as a graphic designer.

As I'm not yet married and still live at home, I'm able to go on frequent holidays with my girlfriends and we have a lot of fun together.

I'm the main planner for our trips and it can be difficult to keep everyone happy! Usually, my friends all choose a few things they'd like to do and then I plan our itinerary and our travel agent organises the things that should be booked in advance so we don't miss out. But we like to keep things a little unplanned so we can be spontaneous!

We're planning a trip to Australia and we want all the tips for the best shopping, food and nightlife while we're there!

Spending and Splurging | Greater focus on cultural attractions, nightlife and locations that are instagrammable

Dining experiences | A wide variety of local and international options

Trying authentic local foods - seeking street food and casual options such as food trucks in addition to on trend restaurants

Expects a wide variety of international options which can be difficult to find in India, such as sushi

Activities | Shopping, cultural attractions and nightlife all hold appeal, plus Instagram famous locations

Plenty of time for shopping!

Group activities such as cooking classes or gallery tours

Nightlife options, such as shows, clubs and festivals

Locations which offer social media cache and content creation opportunities such as tulip or lavender farms

Accommodation | Mid-range quality to suit a group's varying budget

Accommodation that will suit the varying budget of her group while maintaining a mid-range level of quality, security and cleanliness

High quality luxury hotels are not necessarily needed although the group may splurge on one or two nights in higher quality accommodation for a special location or occasion

*I'm into trying different cuisines, I love seafood. We don't get international cuisine like Japanese sushi in India, but I would expect that in Australia as well. I'm going to eat and drink and enjoy!
- M, Gen X, Holiday Travel*

Appeal and consideration of Tasmania | A quiet and peaceful spot which looks beautiful but may not offer the excitement the group is looking for



"The expectation is for [Tasmania] to cover everything...wildlife, nature, nightlife, safaris, food, I want to explore different cuisines"

- F, Millennial, Holiday Travel

Drivers to consider Tasmania

- Unique local festivals such as the Taste of Summer Festival or Dark Mofo
- Cultural experiences such as museums and art galleries like Mona
- Wildlife experiences for the animal lovers in the group
- Shopping for fashion, jewellery and homewares at markets and boutiques
- Warm, welcoming people

Barriers to consider Tasmania

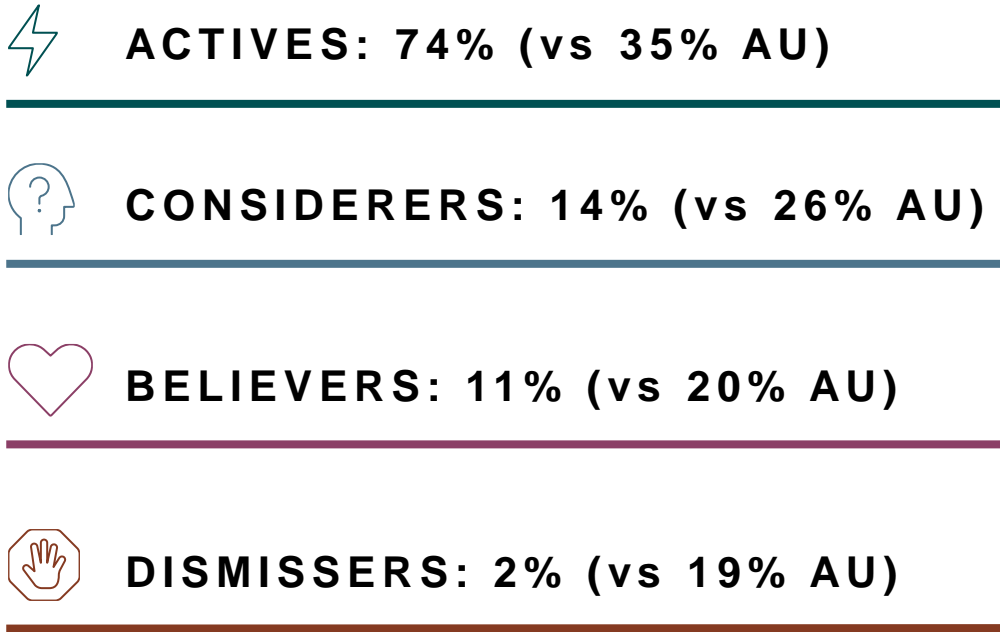
Limited understanding of what Tasmania is like and a perception that it is a very quiet, rural location which doesn't offer the nightlife, shopping or dining experiences that the group would enjoy

Identifying key motivations and expectations

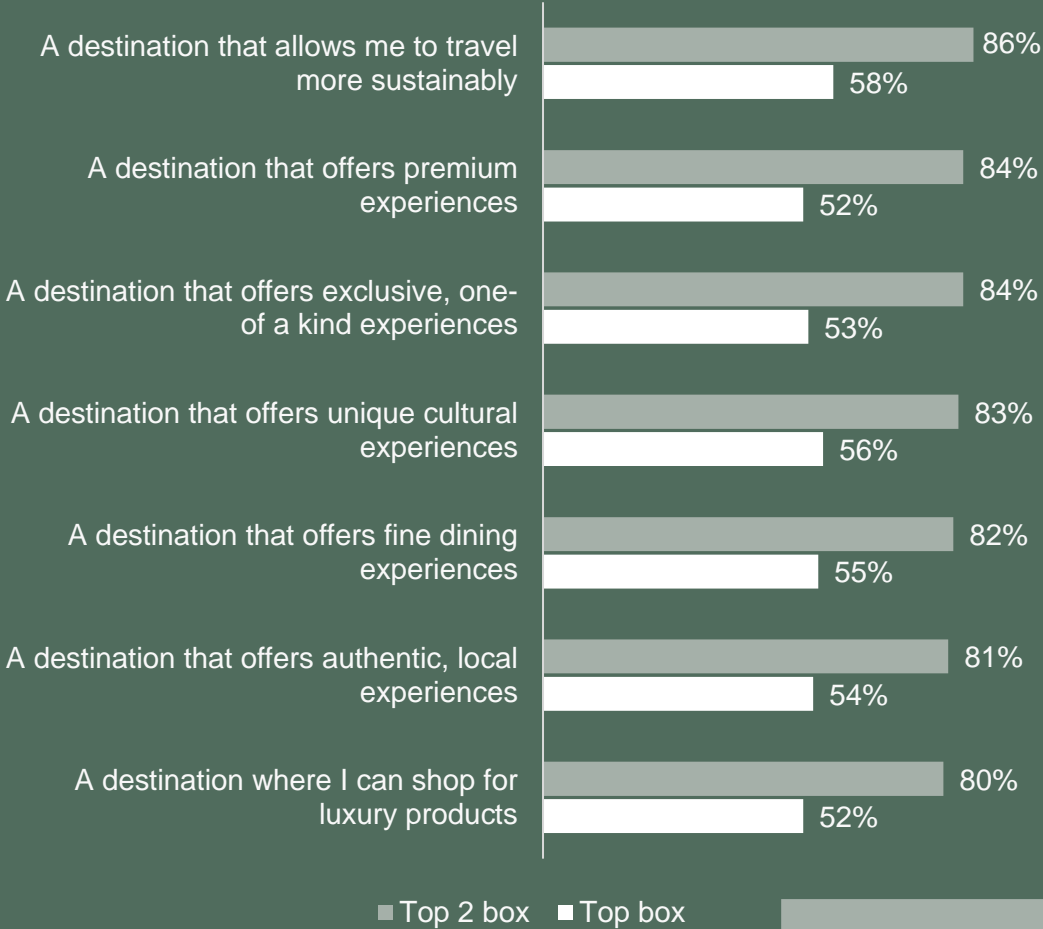
How are we measuring values, motivations and expectations of Indian HVTs

OVERALL TRAVEL VALUES	EMOTIVE AND FUNCTIONAL TRAVEL MOTIVATIONS	ACTIVITIES	SUSTAINABILITY SEGMENTATION
<p>How important are the below factors when you travel?</p> <p>For example:</p> <ul style="list-style-type: none">• Sustainability• Premium experiences• Exclusive, one of a kind experiences• Authentic, local experiences• Fine dining experiences• Unique cultural experiences• Shopping for luxury products	<p>Understanding what is most important to our HVTs for a vacation to Australia...</p> <p>For example:</p> <ul style="list-style-type: none">• Embracing somewhere new and different• Escaping everyday life• History I can learn about• Unique sports experiences	<p>Understanding what activities our HVTs would be interested in while vacationing in Australia...</p> <p>For example:</p> <ul style="list-style-type: none">• Adventure activities• Arts/culture• Connecting with locals• Food and beverages• Nature activities• Party and social• Relaxation• Sporting events	<ul style="list-style-type: none">• The Actives are much more likely to believe that they can make a real difference through their actions and think they are personally affected by social and environmental issues.• Considerers are on the fence about if they can make a difference through their choices.• Believers are heavily influenced by social factors, thinking their choices show others who they are and what they believe in.• Dismissers are characterised by their apathy to all things sustainable.

Sustainable travel is a key priority for our high value travellers, followed by how they experience a destination through the local culture, food, and people



Travel Values

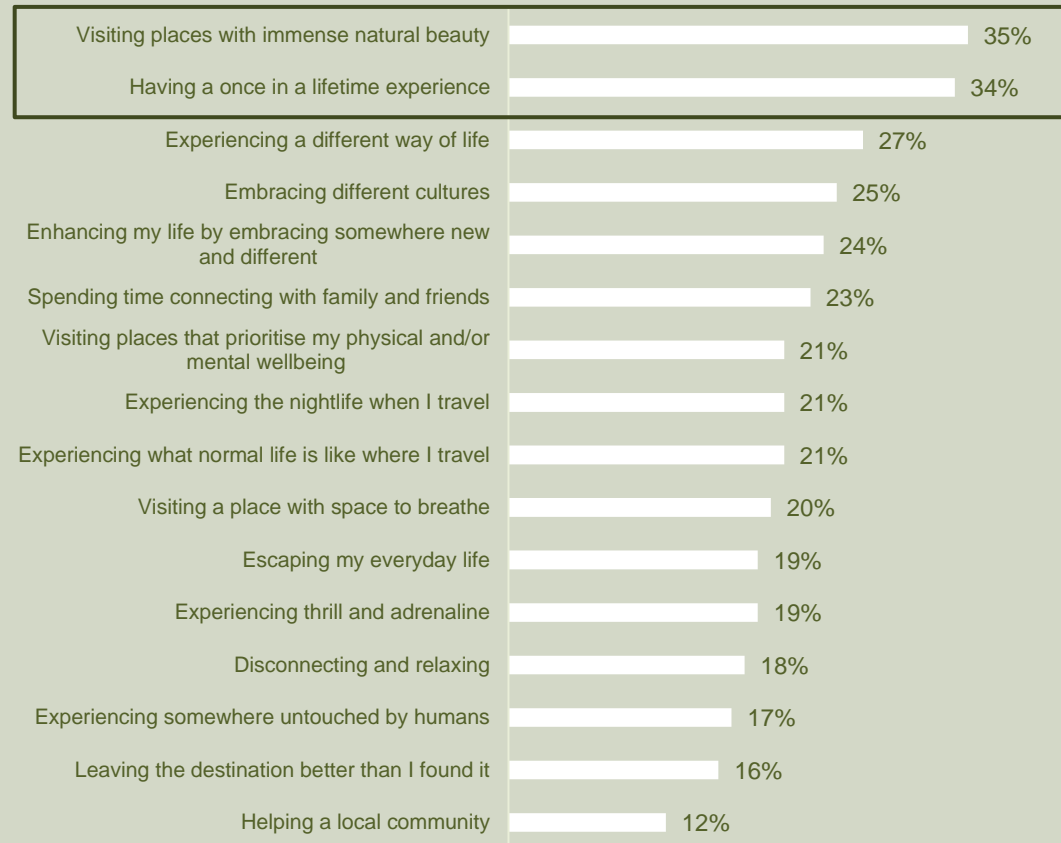


Q. How important are the below factors when you travel?
Total Base n=972
Comparison to Australian Segmentation study conducted in 2023

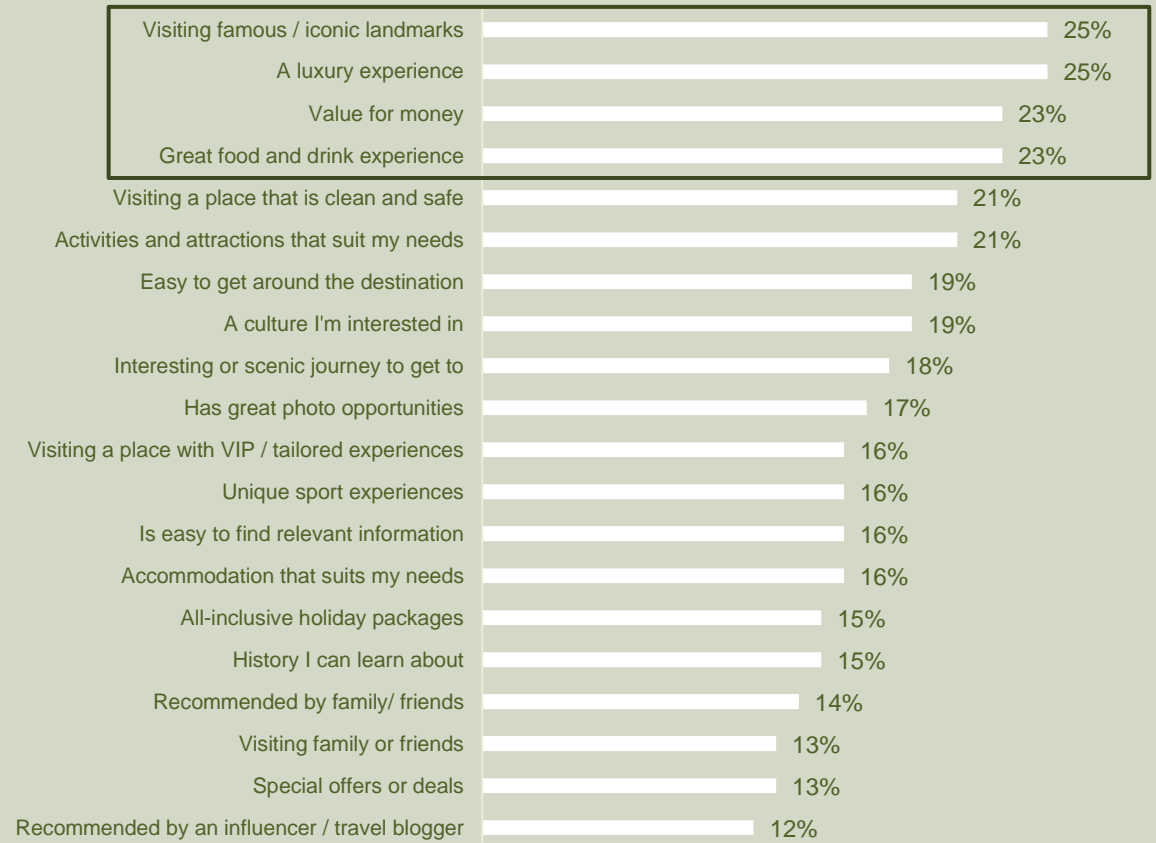
35-44s are more concerned with sustainable travel than our other age cohorts, however, all ages remain high on this measure

Indian high value travellers want to immerse in natural beauty and have a once in a lifetime experience. Despite prioritising luxury experiences, our travellers need to feel they are getting value for money. Food and drink is also a key motivator

Emotional Travel Motivations



Functional Travel Motivations





Value for money is the cross section between quality, comfort, unique and maximising enjoyment

The overall experience and how people are left feeling determines value and is hugely important to HVTs

They seek out something that is both functionally and emotionally fulfilling and enjoyable for everyone involved

And they are happy to trade off to ensure they get the experience they sought – paying more when it is important and cutting costs on less important things

Luxury and high-quality are short-cuts to comfort, high quality experiences and service so can ladder back to value, but are not the only value drivers

I think, you have worked hard, and you also want to then reap rewards of your hard work and what you have earned. So, want to splurge and enjoy and have a good experience. Now, when you travel to different parts, it gives you a sense of expression to see and experience of how people live across the world, different cultures, heritage, lifestyles that people have. So, these are all different things that really make you want to go and have a trip abroad and make it worth it – F, Gen Z, Holiday Travel

At the core of why travel is important for HVTs is the ability to have a once in a lifetime experience

Learning and growing spiritually and emotionally

Challenging their own perceptions, and understanding of the world around them

Moving beyond what they know and seeing the world in a broader view

"I have always hated people calling me a tourist in any other country. I always want myself to be called a traveller because for me it's not just going to a place ... travel for me is worship, is devotion. I feel closest to God when I am seeing the beautiful world created by Him... now I want to explore people from all over the world, explore their food, their culture, how they life, what they like"

- F, Gen X, Visiting Family

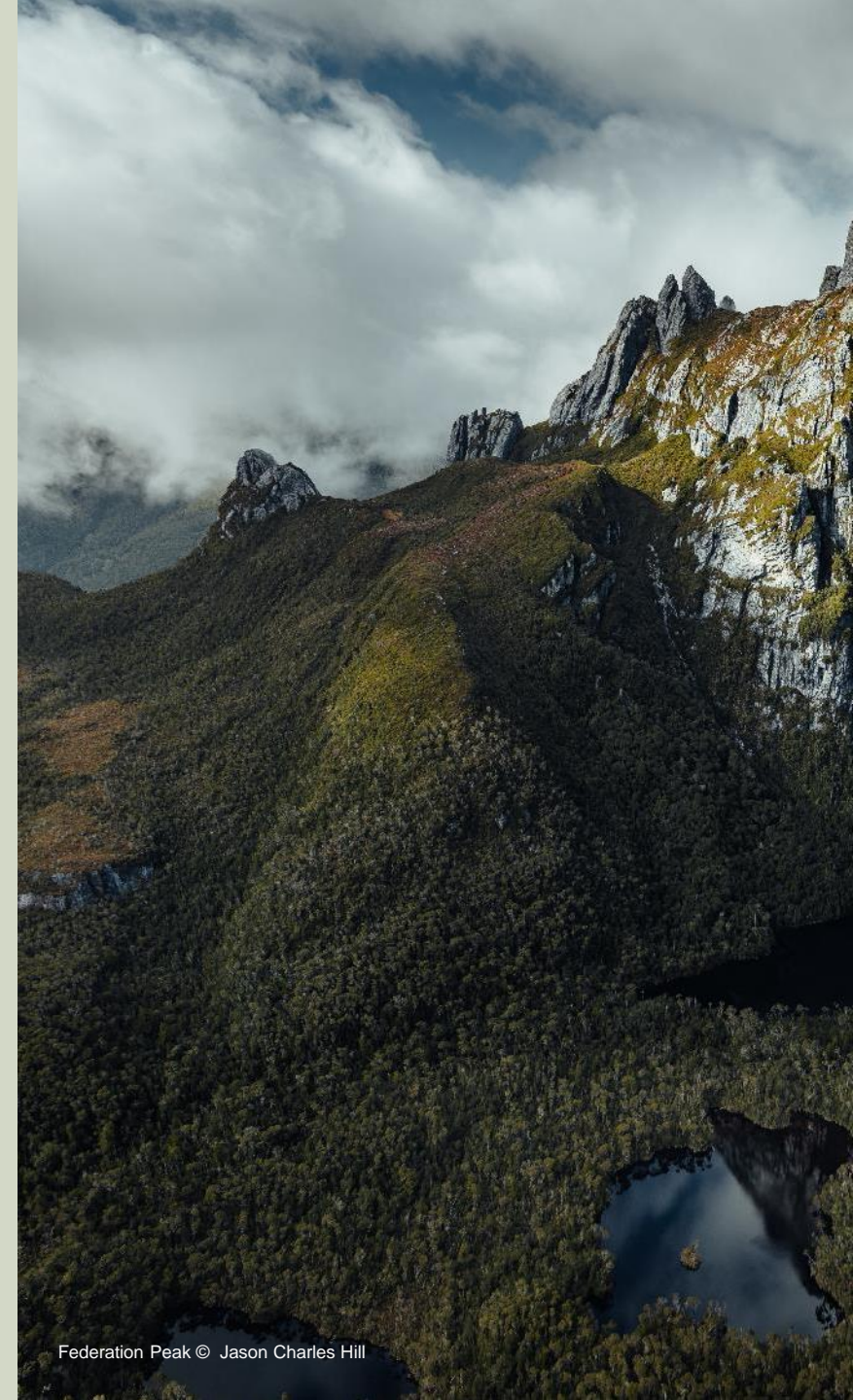
Creating lasting memories and enjoying life to the fullest

Once in a lifetime experiences are unique and add a sense of adventure and enjoyment to travel

HVT seek out these experiences

"I have a hunger for places which people usually don't plan in their trip. So that's why I would love to go to Tasmania. And the people, I want to know the people over there and what I perceive is what I think maybe in Tasmania I'll get to see the tribes, the Aboriginals, you know, the ones who were the real locals of Australia ... and their culture. You know, there are things I will come to learn over there and to know"

- F, Gen x, Visting Family



Food experiences are important for both practical and emotional reasons. With high vegetarian/vegan diets HVTs seek places that will cater for them, while also seeing food as a conduit to cultural connection



Culturally food is important and relevant to HVTs. A love of sharing and enjoying food, they want to ensure they will be able to eat well while they are travelling

Options and availability can help sway a decision around whether to visit a place. If there are concerns, they won't be able to have their diet catered for this can be a deterrent

And I have heard that there are a lot of vegan and vegetarian cafes and restaurants in Melbourne and Brisbane. So, I'm very excited to try those. Getting vegetarian food in a foreign country is difficult. So, I've heard about these places and I'm, you know, keen to try those places out a lot. - F, Gen Z, Holiday Travel



Food is seen as a means of getting to know other cultures as well, exploring new flavours and dishes creates connection

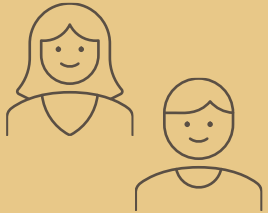
Food is seen as a gateway to understanding and experiencing other cultures. Learning traditions, flavours and experiences through food helps them to connect

The culture, the heritage, the lifestyle, the food, food, everything is different....there are certain cultural traits which are unique to each country and nation. Food also even if you talk about India, you go from Maybe Bombay, just go hundred kilometres towards Gujarat side you will find a different taste. - M, Gen X, Holiday Travel

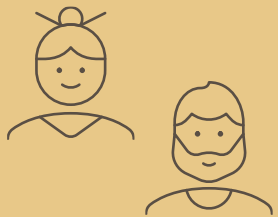
Do motivations differ across gender and age?



Our male HVTs place greater importance on immense natural beauty and experiencing different ways of living than our female HVTs (42% vs 29% females). They are also more likely to seek accommodation that suits their needs (21% vs 11% Females)



Our 35-44s are more likely to want to help a local community while travelling to Australia (20% vs 12% total)



Our 45 plus are more likely to seek once in a lifetime experiences than other generations (41% vs 34% total)

"Australia is now on my bucket list...it is the isolated beauty that I [seek]. It is a very isolated place from the rest of the world and yet so beautiful and so I'm very much keen"

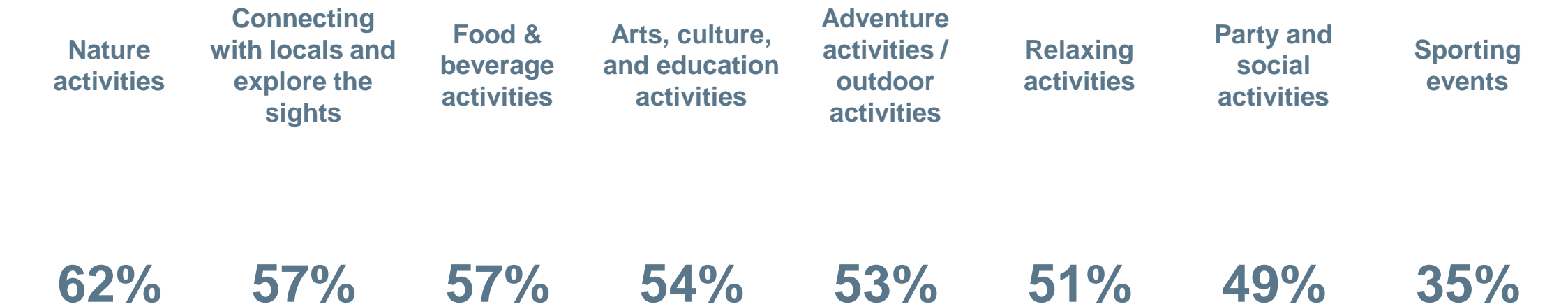
- M, Gen X, Holiday Travel

"There's a lot of things Australia has to offer. It's possible to see one of the seven wonders of the world ... these are beautiful things that we have seen videos of, and you definitely want to go and explore them firsthand.

... it's expensive, but I mean, it's a once in a lifetime opportunity"

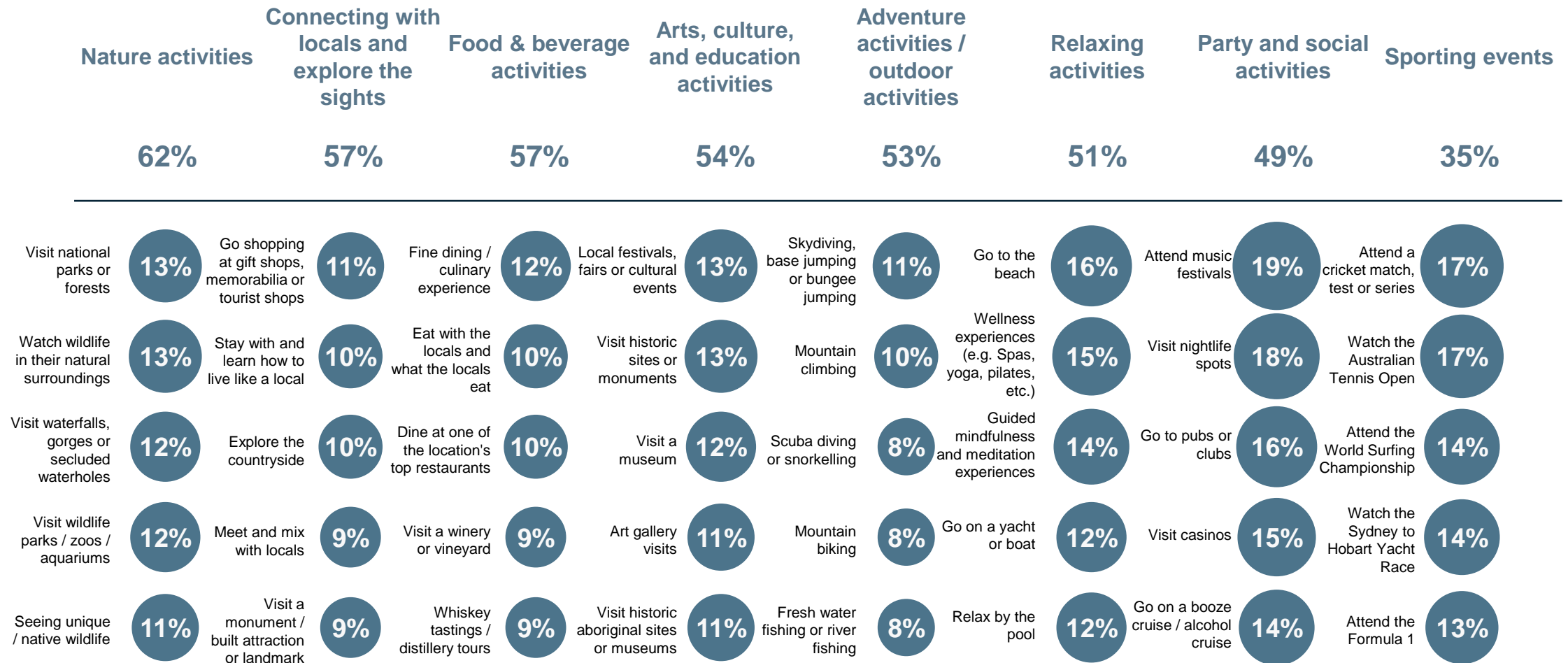
- M, Gen X, Holiday Travel

Aligning with our offer, Indian High Value Travellers are interested in nature, connecting with locals, as well as experiences related to food. Content should focus on these three areas to attract our target audience



Adventure as well as party/social skew to our younger audience HVTs (25-34s)

Whilst nature, connection, and food and drink is prioritised overall, individually, elements of relaxation (beach), social (festivals/nightlife), and sport (cricket/tennis) are also motivating for this audience





Traveller Passport – Last Trip to Australia

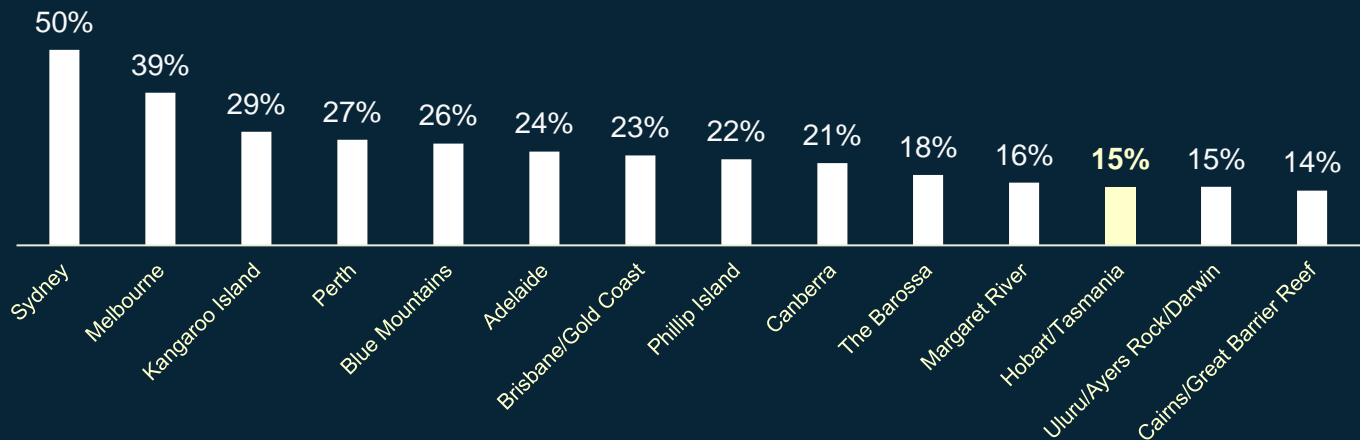


Trip Purpose

Vacation/Break	56%
Visiting Family	39%
Visiting Friends	39%
Special Occasion	32%
To attend a sporting event	26%
For school or study	16%

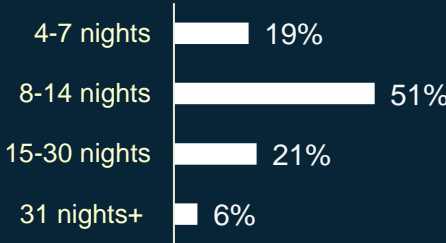
Last Trip Purpose
Total Base n=944

Destinations Visited



Most recent travel destination in Australia
Total Base n=944

Length of Stay



Mean 14 nights

Last Trip Length of Trip
Total Base n=944

Last Travel Companions

With a partner/as a couple	51%
As a family w/ children	47%
Other family or family and friends	25%
With a small group of friends	24%
With a tour group	19%
Business/work associates	13%
With a school/university group	11%
Alone	6%

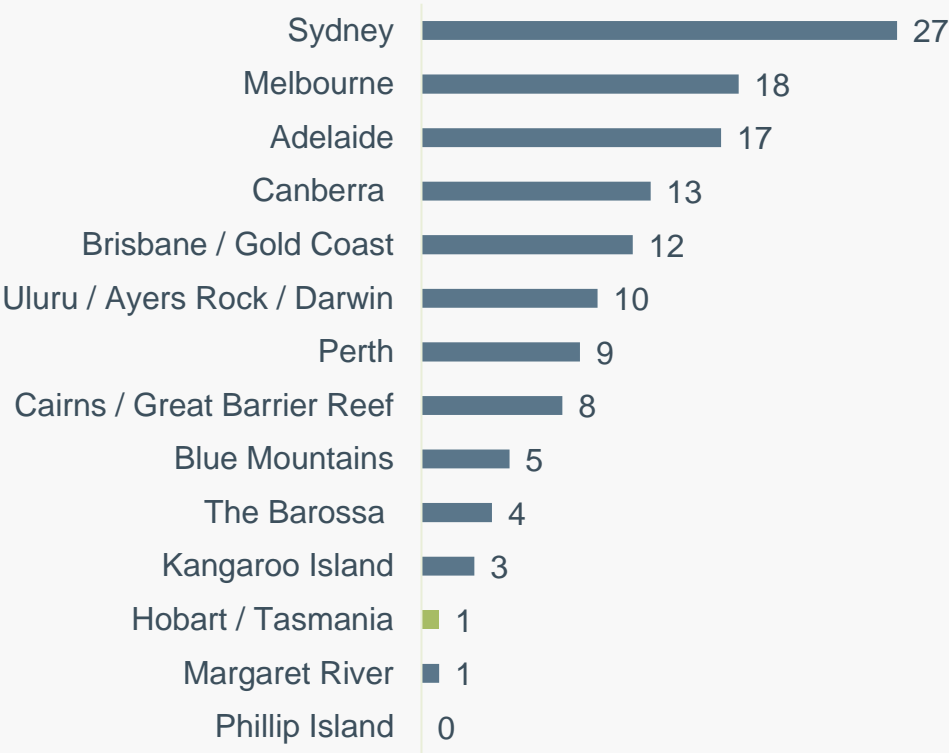
Last Trip Travel Companion
Total Base n=944

Evaluating alignment with Tasmania's offer

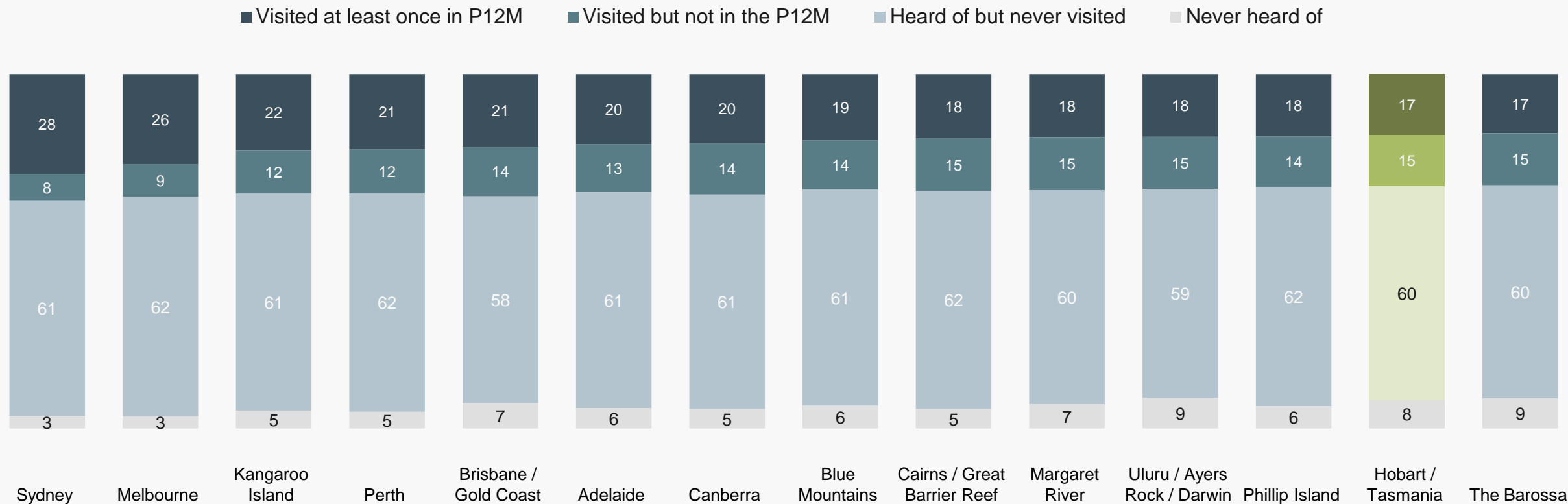
Sydney has strong mental availability within this market for high value travellers. Tasmania is not top of mind compared to the other Australian states, sitting on par with Margaret River



Spontaneous Awareness



Sydney and Melbourne sit in the strongest position, with 1 in 4 having travelled at least once in the P12M. South Australia (Kangaroo Island and Adelaide) is also well positioned for this audience. Aligning with our lower saliency, Tasmania sits in line with Phillip Island



Tasmania is not well known by HVTs. Confusion around size, location and connection to Australia create disconnect

Some perception that Tasmania is not connected to Australia, highlighting a need for greater education

Low connection or knowledge of Tasmania as a destination

Uncertainty around location, connection to Australia or how to get there

Most had heard of Tasmania, but overall knowledge was limited

- some question connection to Australia
- others think it may be a country or island on its own
- geography is not well understood

Island associations can cue tropical beaches, warmth and relaxation

As an island in the region some assumption the climate will align with Australia or the Pacific Islands- warmer climates, sunny beaches and a more tropical lifestyle

Education is needed to help to help overcome awareness issues

Current misconceptions can hinder consideration of Tasmania

With some education and exposure there is an opportunity to draw people in and promote Tasmania as another must see destination for HVTs

*"When you to Australia, people say, 'yeah, we've been to Sydney, we've been to the Gold coast, we've been to Melbourne. But you know, who's talking about Tasmania? People don't"
- F, Gen X, Holiday Travel*

*"Australia is marketed well but Tasmania is a part of Australia, and I don't see any kind of marketing [about it] over there...there is not much of push by the tourism authority for Tasmania"
- M, Gen X, Holiday Travel*



Traveller Passport – Last Trip to Australia

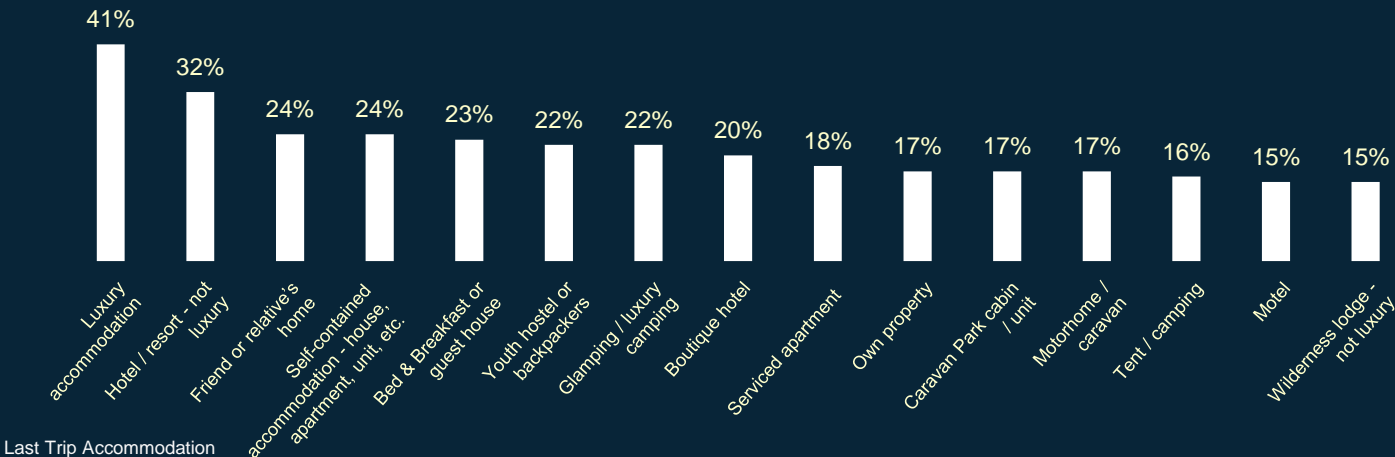
Group Size

2 people	12%
3-5 people	44%
6-10 people	32%
11-15 people	8%
16-20 people	3%
More than 20 people	1%

Mean 6 people

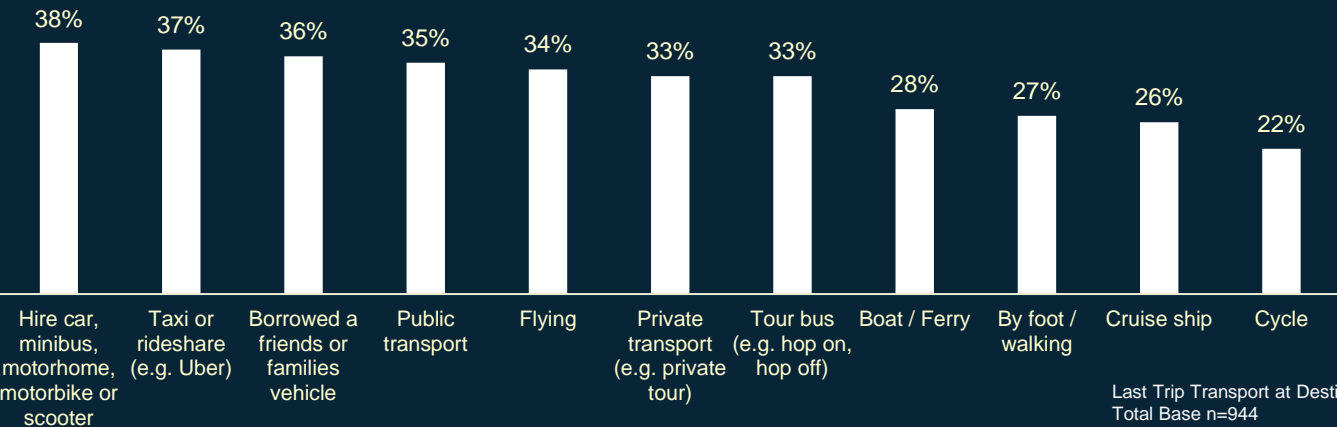
Last Trip Group Size
Total Base n=883

Accommodation



Last Trip Accommodation
Total Base n=944

Transport Used



Last Trip Transport at Destination
Total Base n=944

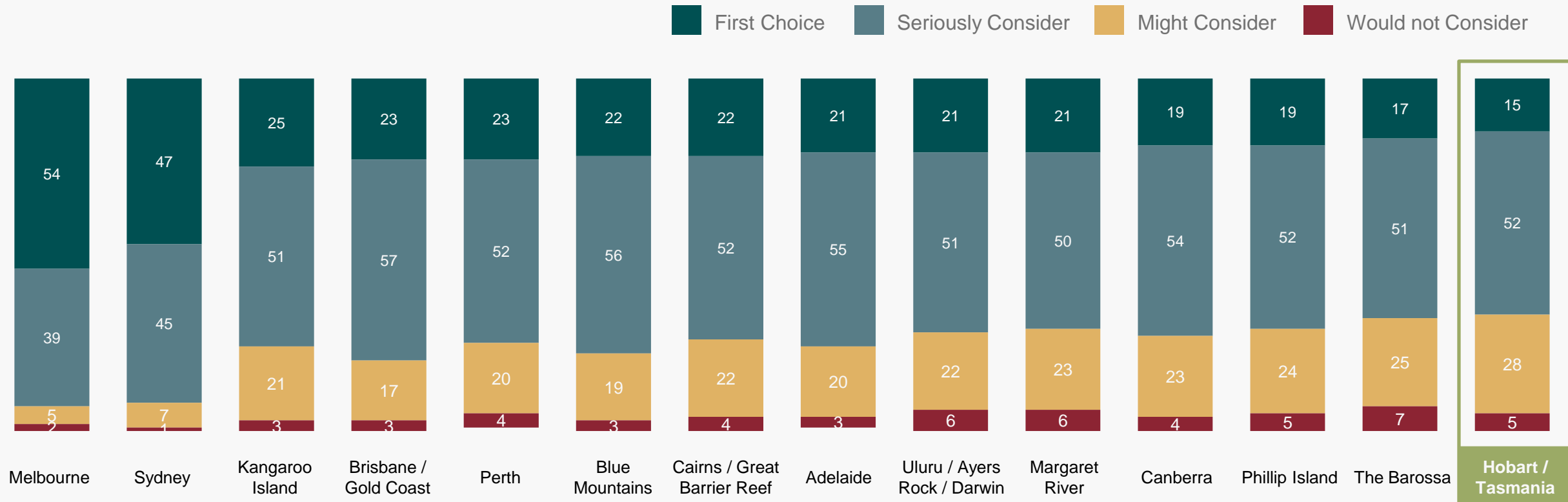
Repeat Visitation

68% Visited for the first time

32% Have visited Australia more than once

Last Trip First Time
Total Base n=944

Both Melbourne and Sydney represent strong motivators to travel to Australia with almost half claiming these destinations to be their first choice. This highlights the challenge/opportunity for Tasmania to compete against other destinations once travellers have decided to come to Australia



Tasmania has an opportunity to appeal to the HVT in India through exploration (touring, arts/culture, history/heritage), whilst also representing a place to connect with locals – as these represent the key levers to driving demand for HVTs



Contribution to Demand Power for Indian HVTs

Explore (30%)

- Is a place ideal for **touring**/self-drive holidays
- Has arts, events and festivals like nowhere else
- Is a place with interesting history and heritage attractions

Relax and connect (29%)

- Is a place where I can relax with my family
- Is a place where I can disconnect and relax
- Is a place that offers a variety of different experiences
- Is a place with authentic, genuine people

Immerse (21%)

- Is a place where you can feel reinvigorated
- Offers great food and drink experiences
- Is a place where I can make a positive contribution to sustainability

Winter and Wildlife (19%)

- Has nature, wilderness and wildlife like nowhere else
- Offers a winter experience with a difference

The lack of population in Tasmania holds high appeal for HVTs who seek relaxation and quiet as a juxtaposition to their day-to-day life

They seek out destinations that are different to home

Culturally and visually HVTs want to experience a place that feels new and unlike their home

Tasmania visually and culturally offers a clear departure from what they are used to

Imagery of Tasmania looks peaceful and unpopulated

Quiet, out of the way and remote looking

There is high appeal in visiting a place that feels less crowded

Combined with a cooler climate Tasmania has high appeal

HVTs actively seek out destinations that are colder and have snow

When showcased with the options of things to do for all the proposition feels enticing

See like, even by seeing these images ...the thought is still sustained that less people live in this place. I don't know why, but it just seems that way. Yeah, it just seems very like somewhere, where there is less people. It's more peaceful where there are less people. It just feels very empty in a nice way, is what I can say.

- F, Gen Z, Holiday Travel



However, Indian HVTs are not yet sure what Tasmania has to offer

Nature/Wilderness, self-drive, positive contribution, and food and drink are influenced most by travelling to Australia in the past (P5Y)

Ranked By Importance Demand Power

Is a place ideal for touring/self-drive holidays

Hobart / Tasmania

2

Has arts, events and festivals like nowhere else

0

Is a place with interesting history and heritage attractions

1

Is a place where I can relax with my family

-1

Is a place where I can disconnect and relax

-1

Is a place that offers a variety of different experiences

-2

Is a place with authentic, genuine people

0

Is a place where you can feel reinvigorated

1

Offers great food and drink experiences

-3

Is a place where I can make a positive contribution to sustainability

1

Has nature, wilderness and wildlife like nowhere else

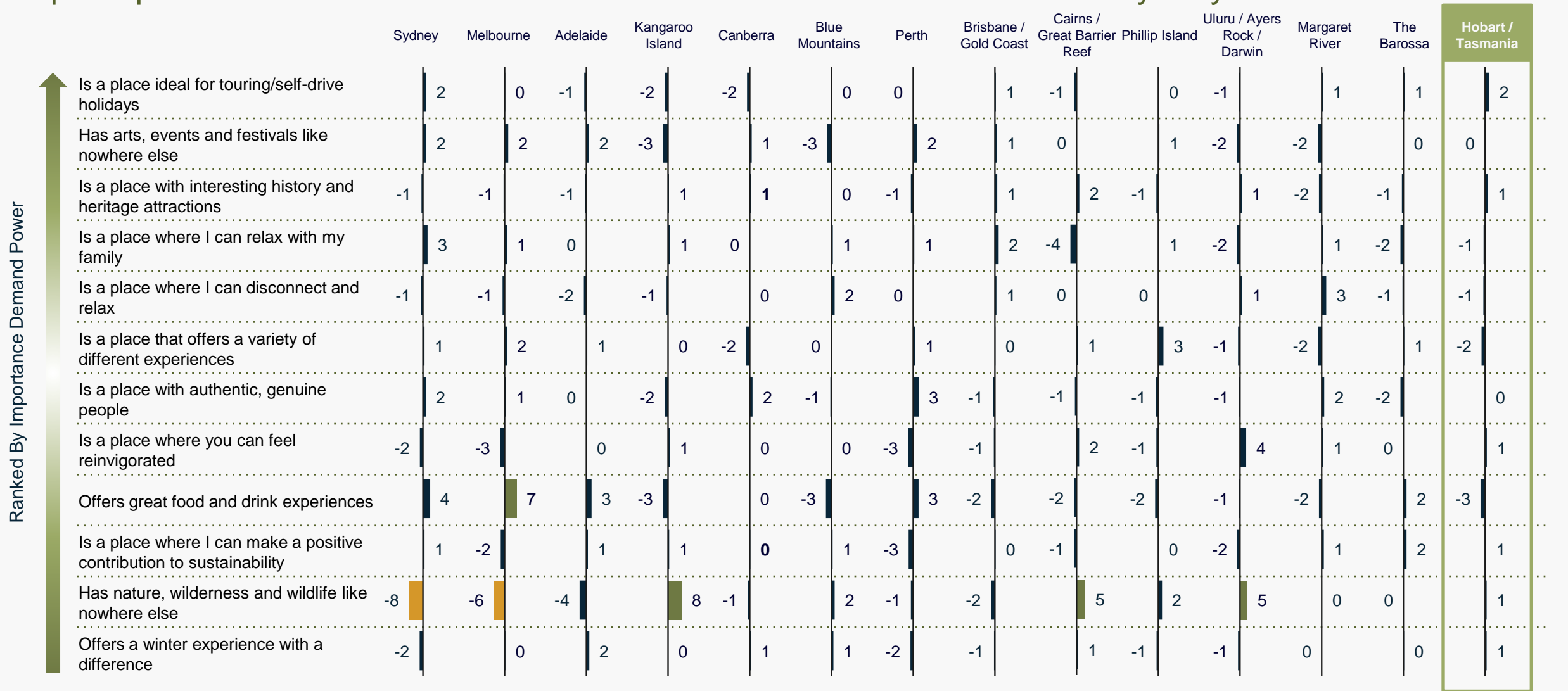
1

Offers a winter experience with a difference

1



This is a similar story across most Australian destinations, with nature one of the only perceptual differentiators. Food & drink are drawcards for Melbourne & Sydney



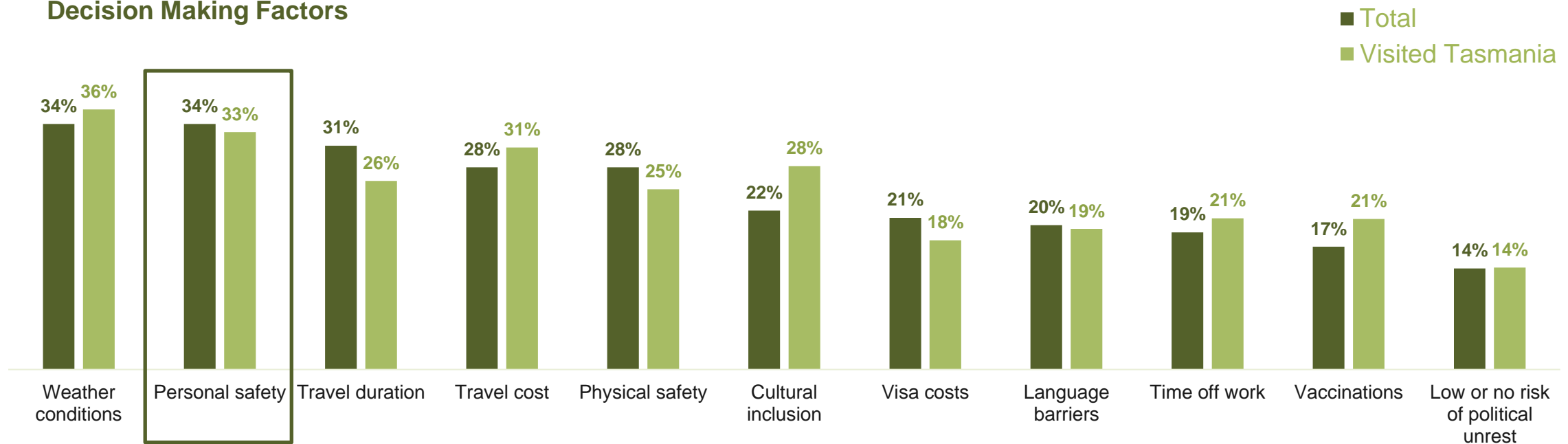
Base: Aware of destinations Total **Hobart / Tasmania**: 894; **Adelaide**: 916; **Perth**: 926; **Uluru / Ayers Rock / Darwin**: 888; **Sydney**: 938; **Melbourne**: 939; **Kangaroo Island**: 923; **Canberra**: 919; **Blue Mountains**: 910; **Brisbane / Gold Coast**: 903; **Cairns / Great Barrier Reef**: 919; **Phillip Island**: 911; **Margaret River**: 905; **The Barossa**: 889
 Ordered by importance to Tasmania and new imagery list added for Q2 2024
 Source: TIM MDF analysis; Imagery: Which of these destinations do you think...?
 Note: variance analysis shown.

What do we need to overcome to unlock opportunity for Tasmania?

1 in 3 of our HVTs are concerned about their personal safety when it comes to travelling to Australia and is likely to influence their decision to travel here. Concerns of cultural inclusion become more prominent for those that have travelled to Tasmania in the past, highlighting a key barrier for returning visitors



Decision Making Factors



In 2021, Tasmania had the lowest proportion of its population born overseas vs other Australian states (ABS, 2021)

Safety becomes more of an issue for HVTs when travelling into unfamiliar territories. Australia is considered safe and welcoming to Indian travellers, but there is some need for reassurance

Greater concern when they have not experienced a place before

Uncertain what to expect HVTs want to ensure they will be comfortable and safe travelling to any new destinations

"Just because I have not heard much of the place... I don't know if, or I am hoping that they have good security arrangements and also good travel arrangements over there"

- M, Gen X, Visiting Family

Low population density, remote locations and wildlife can cause some to question safety

Especially those travelling with families

Some concerns around being lost or encountering wildlife that may be dangerous can prompt safety concerns

"I believe since it's a small island, so wildlife could be [an issue]. As far as I am aware about Tasmania, its wildlife is quite unexplored and probably I won't go with family because it's not controlled, it's not in a controlled manner over there"

- M, Millennial, Holiday Travel

Australia's previous racial issues are still back of mind, though perceptions have improved

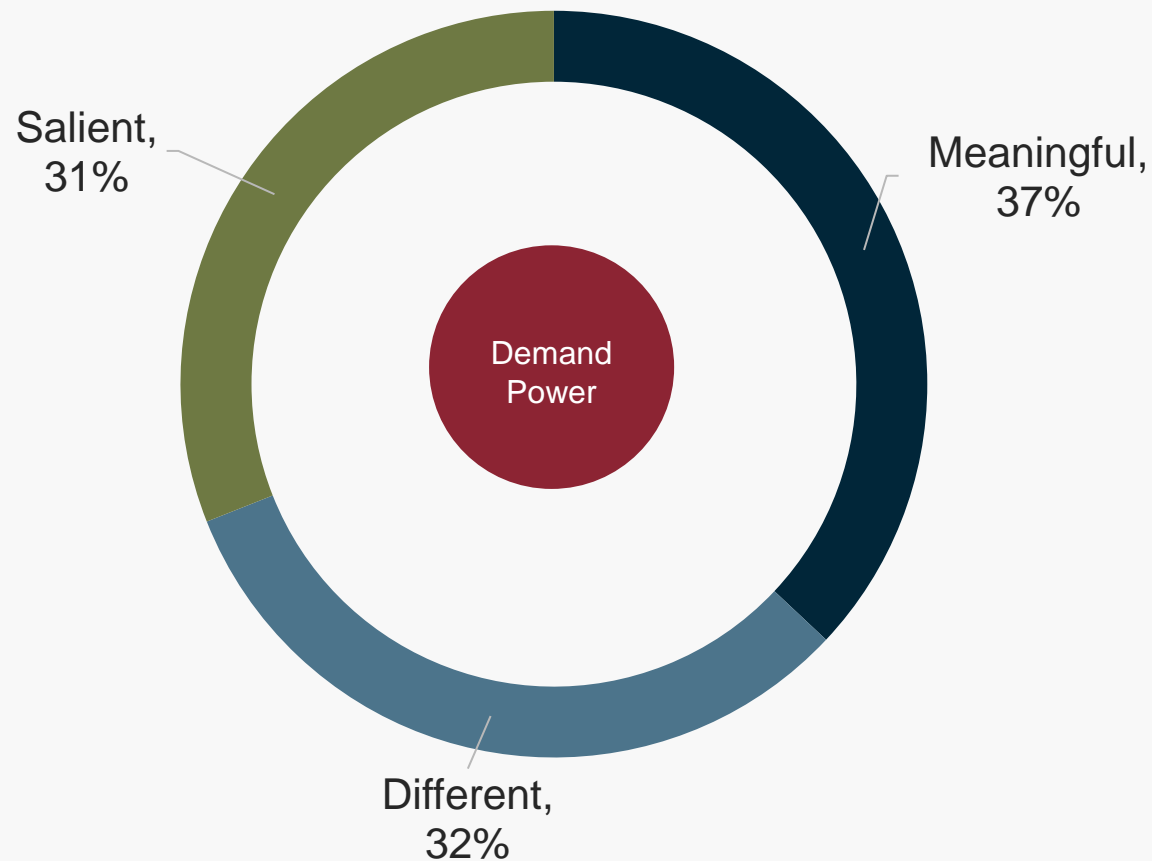
For those who have not travelled to Australia there is some question as to whether the racist issues they heard of in the past still remain, and whether this would be prominent in Tasmania as well

While this largely feels in the past, some reassurance would be welcomed to ensure they would be welcomed

"Since, two years I haven't heard it but there was a lot of racism [towards] Indians. So, that was my primary concern to coming"

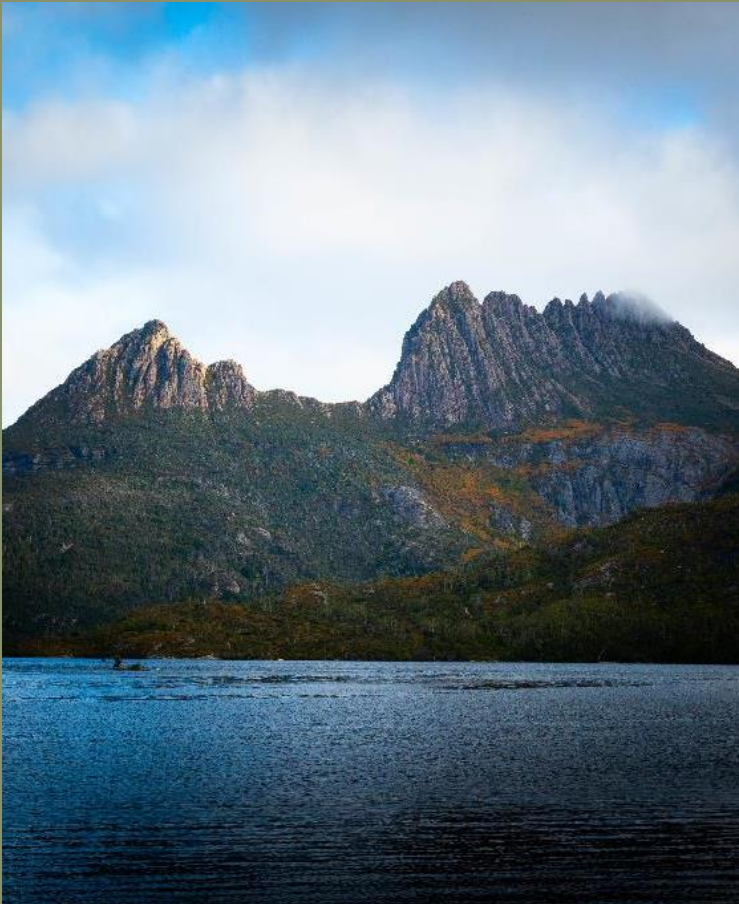
- M, Millennial, Holiday Travel

For our Indian HVTs, destinations must be Meaningfully Different, but they must also be able to activate this position through their Salience. As a smaller destination for this market, Tasmania needs to be efficient and effective in the way it communicates



Our BrandZ data in this market tells us that Indian Holiday and Travel booking brands need to be first and foremost Salient (44%), then Meaningful (33%), and finally Differentiated (24%).

Key to getting Tasmania on the list is highlighting its distinctive nature to other Australian destinations, reinforcing accessibility



Elevating Tasmania's unique offerings to mainland Australia

- Communicating distinctive experiences, specialised activities, and endemic wildlife will help shape perceptions of a new and interesting place to explore

"I think the first thing that Tasmania should do is ... kind of carve out a niche sort of identity that these locations are different to what you would probably see in Australia. And these are the things you should come to Tasmania for, so I think it needs certain key locations or experiences to kind of stand out from Australia". F, Millennial, Holiday Travel

Emphasize accessibility and itinerary flexibility

- Note direct flights to Hobart from major Australian cities - effortless addition to the existing plans, removing travel as a barrier to visiting

"I want to go to Tasmania ... when I'm planning Australia, I was planning Melbourne, Cairns, Sydney, Gold Coast but people said [Tasmania] is an hour flight. We can just go there for two days and come back so maybe I'll cut short one city of Australia and make more of Tasmania" F, Gen X, Visiting Family

Additionally, creating a more emotive connection through recognizable symbols and icons could help drive consideration

There is a greater pull factor if HVT's can make meaningful connection to a location

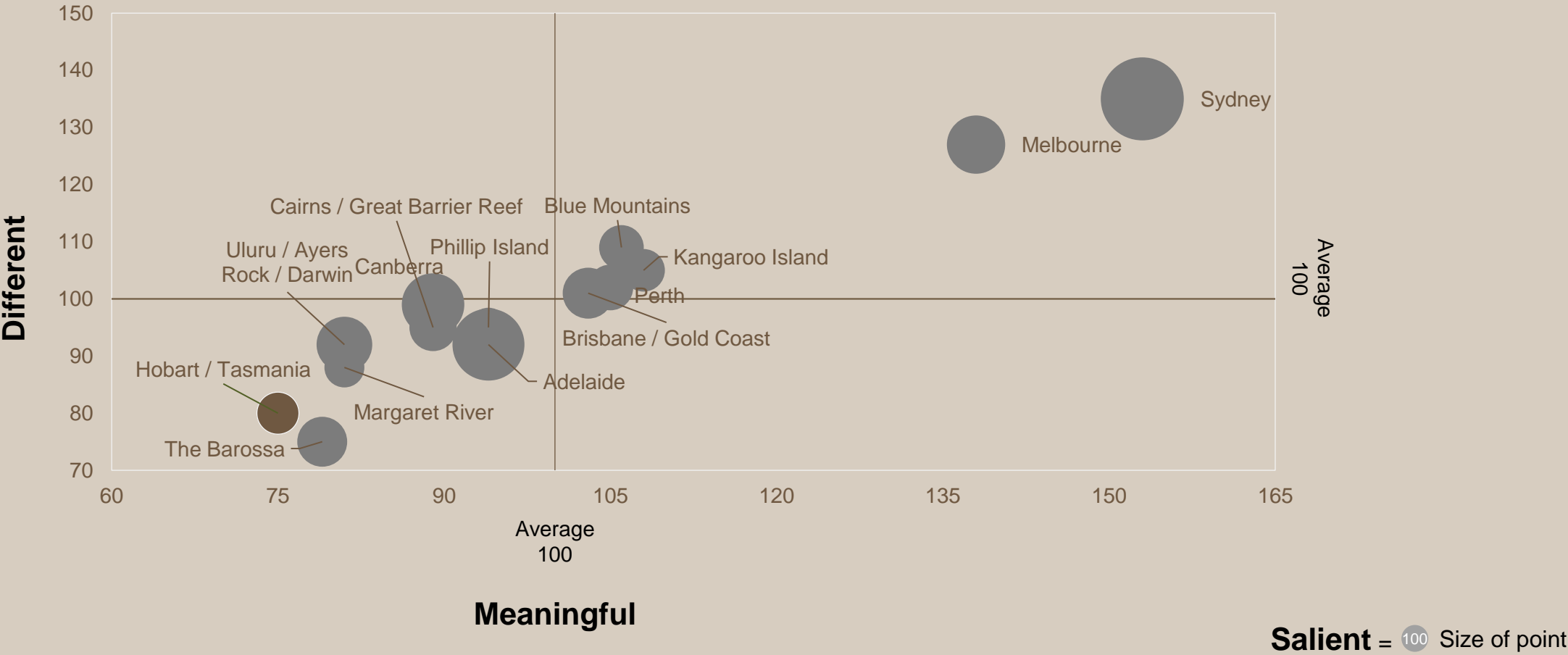
The most iconic being the Tasmanian devil, where Tas (from Looney Tunes) is a well-loved character, they associate with nostalgia

HVTs did not necessarily recognise imagery of the devil, but there is potential to better leverage the Tasmanian devil to enhance emotional engagement and therefore consideration

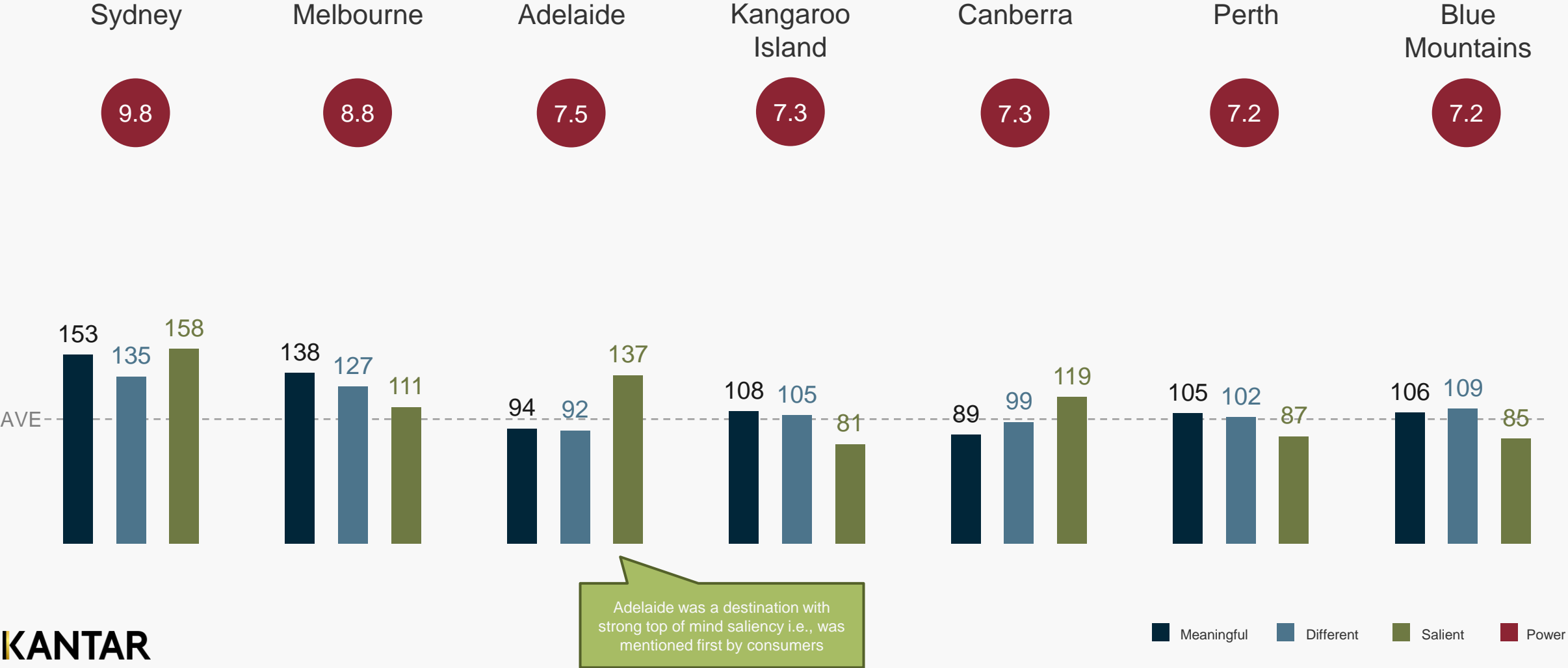
"Especially [in] my generation, it's the Tasmanian devil that's the connect[ion]. So, you don't think of it as a tourist destination, you first think of the devilish cartoon ... I think that would be a good way to spin the story, especially for Indians, in our age group which is the majority of travellers who've grown up watching Tasmanian devil. It'll be a good way to connect and kind of create a [attachment], look that is a Tasmanian devil – see how cute he is? And, you know, he's inviting you to come" - F, Millennial, Visiting Family



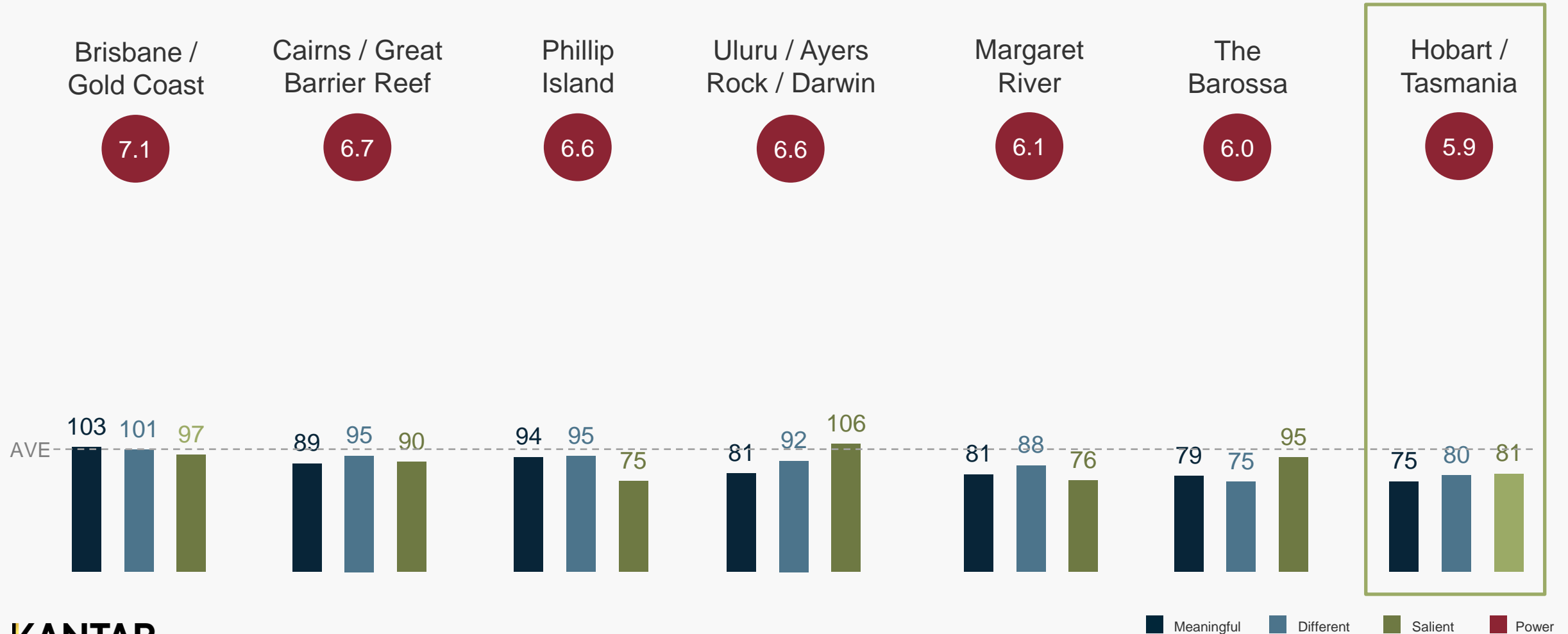
There is little differentiation in the equity landscape amongst our HVTs in India with the exception of Sydney and Melbourne. Tasmania under-indexes across all three pillars, representing a clean slate in this market



Kangaroo Island and the Blue Mountains have relatively similar profiles, under-indexing for Saliency, demonstrating their potential should their awareness increase. While Adelaide and Canberra are both Salient, they are not Meaningfully Different amongst our Indian HVTs



Tasmania represents a relatively clean slate in this market amongst our HVTs. For Tasmania, the first step will be to understand the category needs and how Tasmania can answer these. Our second step is to make noise to grow awareness for how Tasmania delivers to these needs





Perceived value and exclusivity are crucial factors influencing HVT's destination choices. Potential to elevate Tasmania's credentials as a unique, high-quality destination and create a meaningfully different offer HVTs want to explore

The HVT demographic seeks unique, luxurious experiences, yet have little awareness of what Tasmania has on offer

"I expect luxury, so I don't know how much of luxurious experiences there are in Tasmania, but if there are I would love it" - M, Gen X, Visiting Family

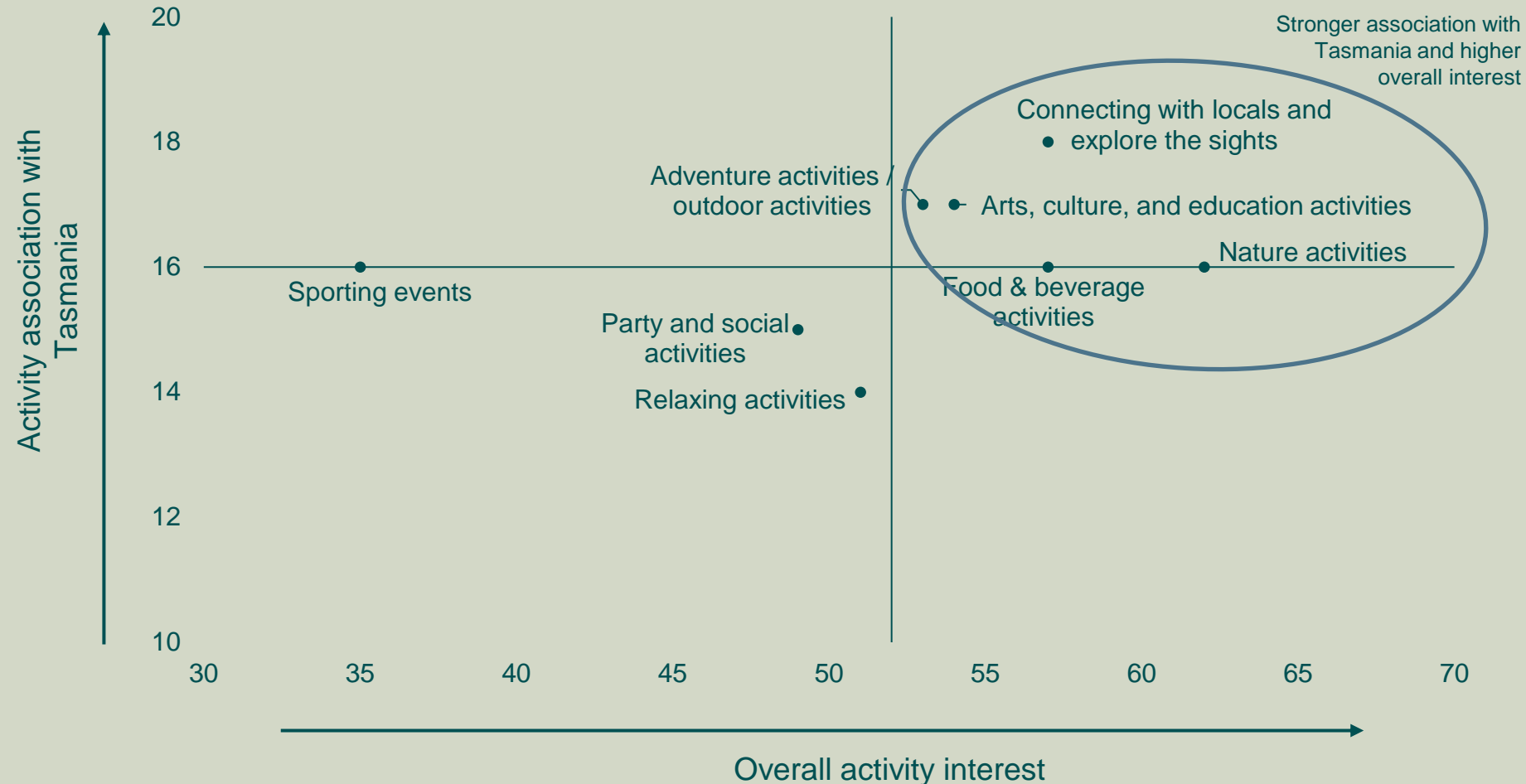
Quality dining, safe comfortable accommodation and unique wildlife and natural landscapes all hold high appeal, as do authentic experiences that are well curated to their needs

"My expectations are that Australia will satisfy me on that ground in terms of luxury things because I think it is a kind of place which can offer you a lot of you know, comfort" - F, Millennial, Holiday Travel

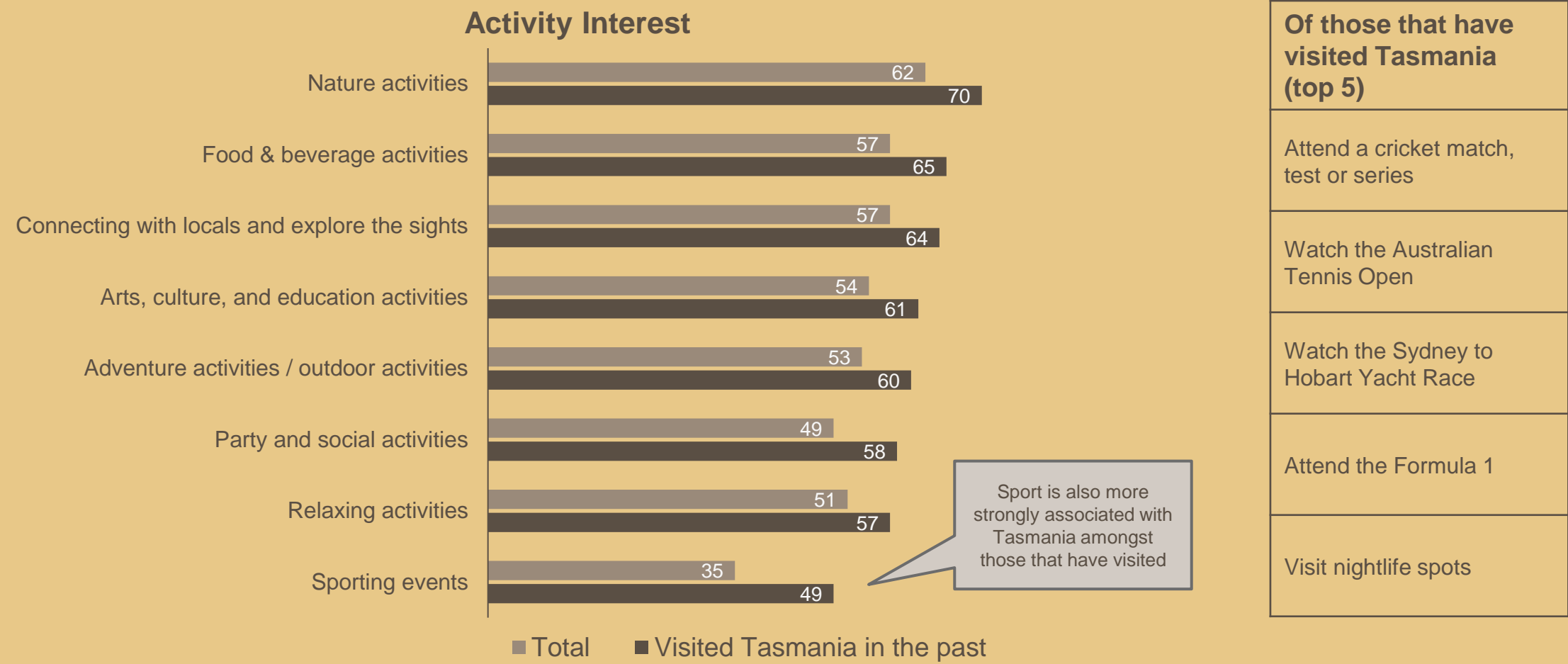
As there is a clean slate for Tasmania in the HVT market, the opportunity is to elevate elements that highlight Tasmania's unique options and exclusive (to Tasmania) experiences to better drive engagement and create a meaningfully relevant positioning



Tasmania is most strongly associated with connecting with locals, however, this association remains relatively low. There is an opportunity to dial up nature and food & drink, given the popularity overall and its lower connection to Tasmania



Of those travellers that have visited Tasmania in the past, sport becomes much more motivating





For male HVTs especially, cricket is of high interest, so connections to sport and recognisable sport icons could act as a lever

Australia already has strong sport ties for Indian travellers, an emotional point of connection that already exists

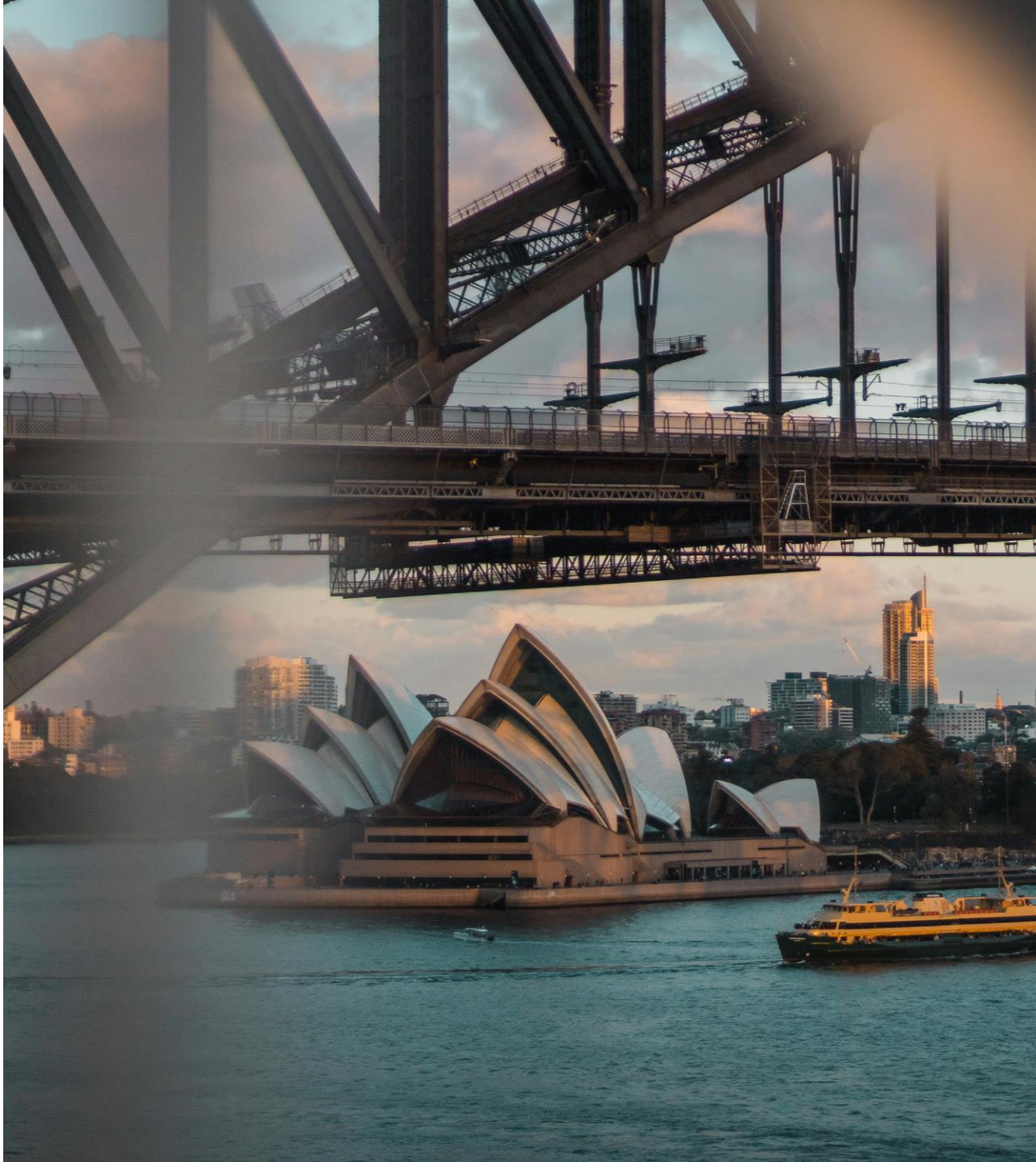
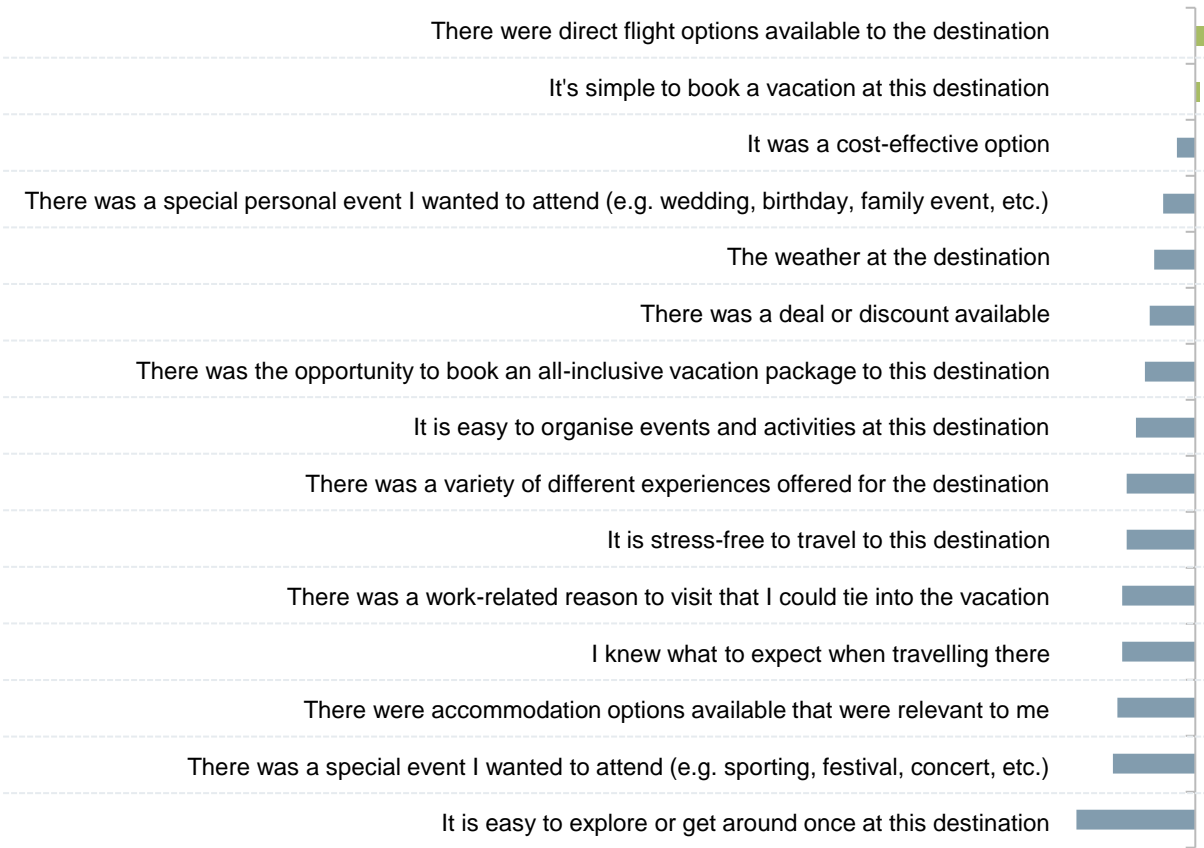
Celebrity connections, endorsements or the ability to see memorabilia connected to cricket is appealing and has potential to differentiate and draw people to Tasmania – strengthening the emotional connection and adding another reason to add Tasmania to the list

But yeah, like, you know, like where Ricky Ponting, uh, played or some mentor. There's Don Bradman also over there and Ricky Ponting and David Boone. So, I used to follow from a child and earliest recollection was he's a Tasmanian. He plays for Tasmanian state after that, him only that Tasmania became famous for us. And Ricky Ponting, though, again, he's a biggest legend. So those kind of people. Or if there's a museum with Dennis Lilly mementos and. And Don Bradman over there. So, we can cover that only in the Tasmania – M, Gen X, Holiday Travel

Ease of getting around, special events, and accommodation were the biggest barriers for HVTs when travelling to Tasmania



Market Barriers and Facilitators for Tasmania



Where travelling in groups is the norm, the logistics of getting around become more important

For HVTs there is desire to understand how they can get around easily and ensuring their plans include details around connections, transport and ease of access

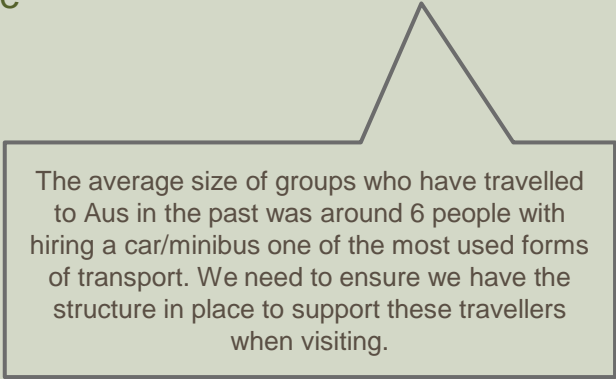
Actively seeking transport apps and details in their itineraries to ensure they have an awareness of where they are and how to move between locations simply

Where bigger groups are involved ensuring ease of transport is vital so that people can do all the things they would like to do

P rearranging tickets for attractions and understanding local transport systems are key to enhancing the overall experience

Perceptions of Tasmania as small, sparsely populated and 'harder to get to' can impact consideration as people assume it may not be as easy to get around

Additionally self-drive, remote access or trekking to get to places can be a deterrent for larger groups who may be less mobile or need larger vehicles to get around



The average size of groups who have travelled to Aus in the past was around 6 people with hiring a car/minibus one of the most used forms of transport. We need to ensure we have the structure in place to support these travellers when visiting.

Once you book the hotel, you know, the preference which is convenient for you, you see the nearby surroundings, you know, the, the tourist attraction places, so you also check out, how to reach that place. Google can't help you out very easily. So that's the only reason I understand what apps they have. Like, every country has their own transport.

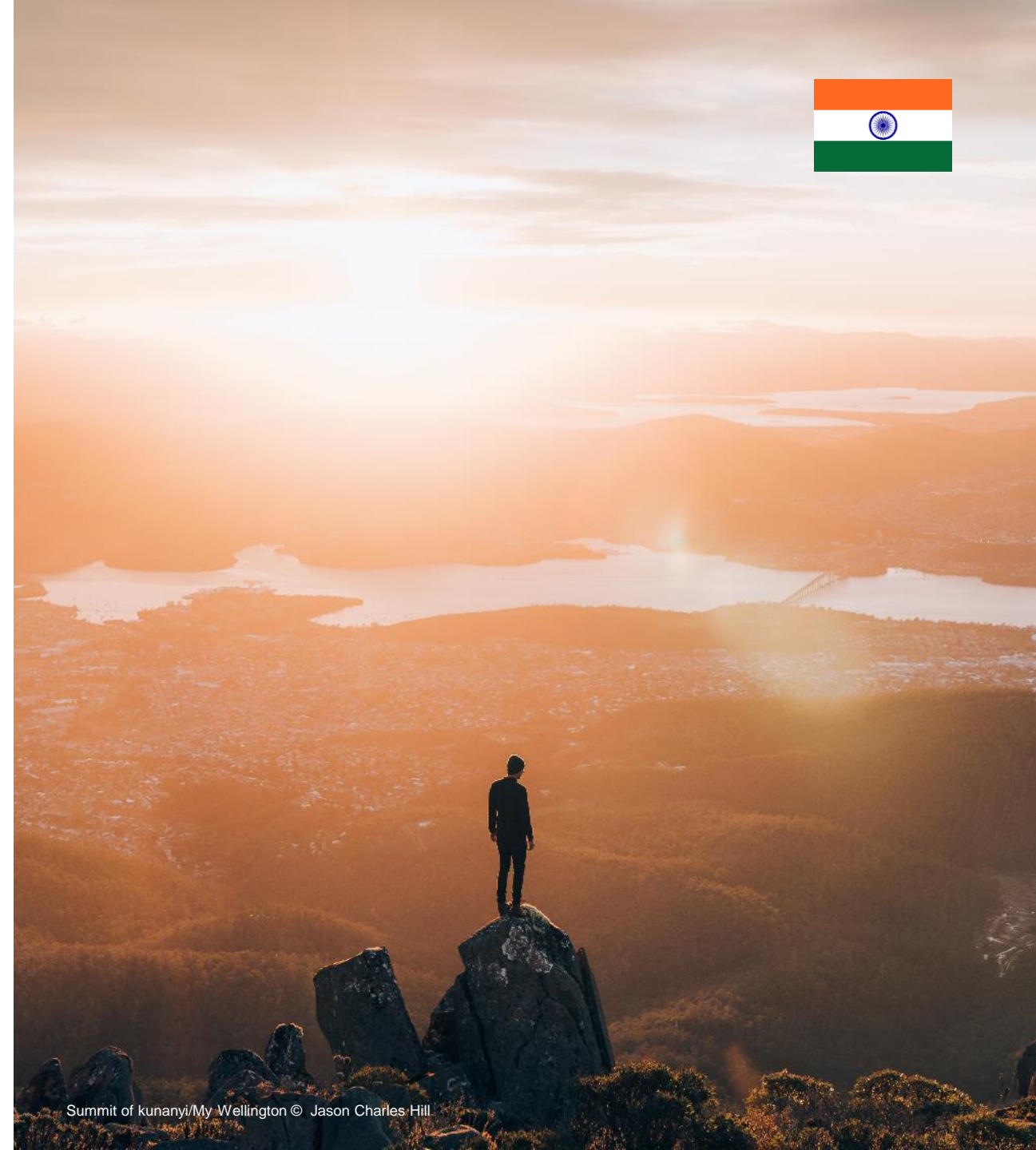
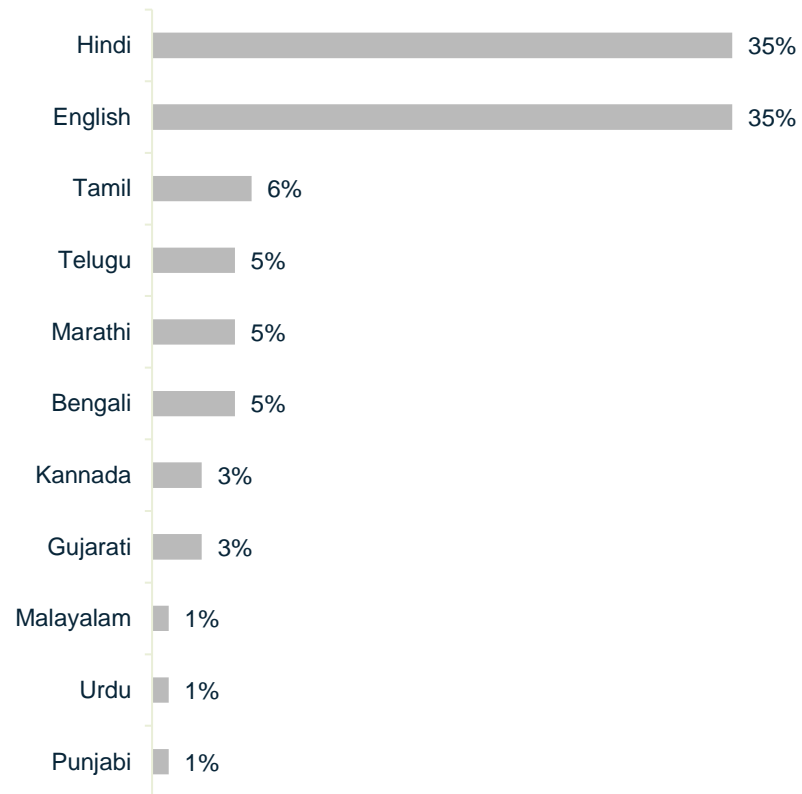
- F, Millennial, Holiday Travel

And then there were destinations like where you need to go by a boat and where you need to probably trek as well...I must be aware of the safety as well. So, the way like the trek was shown, the offshore places like where you need to go via boat as well, those versions. So I won't. I can go there with my wife but not with my parents.

- M, Millennial, Holiday Travel

How do we best reach them?

A third of our HVTs speak English as their primary language at home. Hindi is the most spoken local language



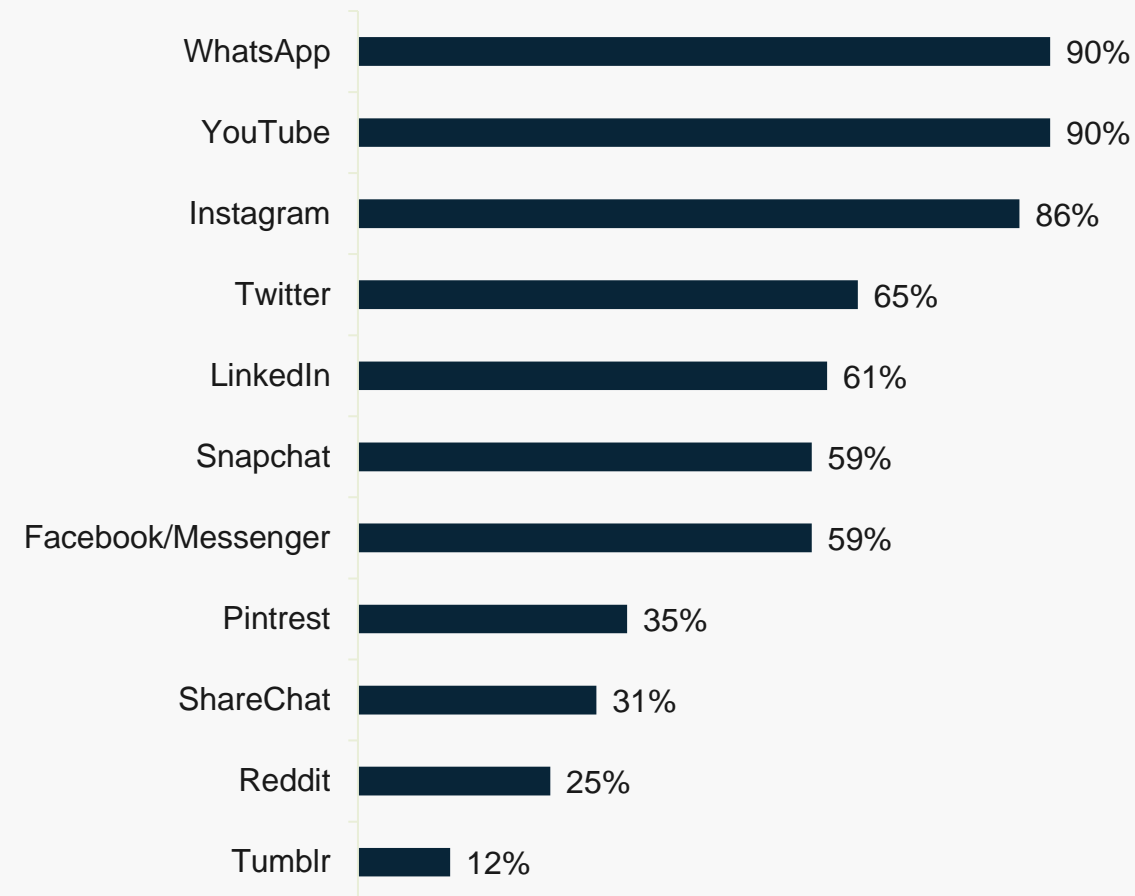


Key social platforms to connect with our HVTs will be YouTube and Instagram

And of course, Instagram, where I am seeing people, making reels of some beautiful places in Australia, especially the wildlife. So those pointers also I'm catching and searching about it online, that is it really worth it because everybody has different views
-F, Gen Z, Visiting Family

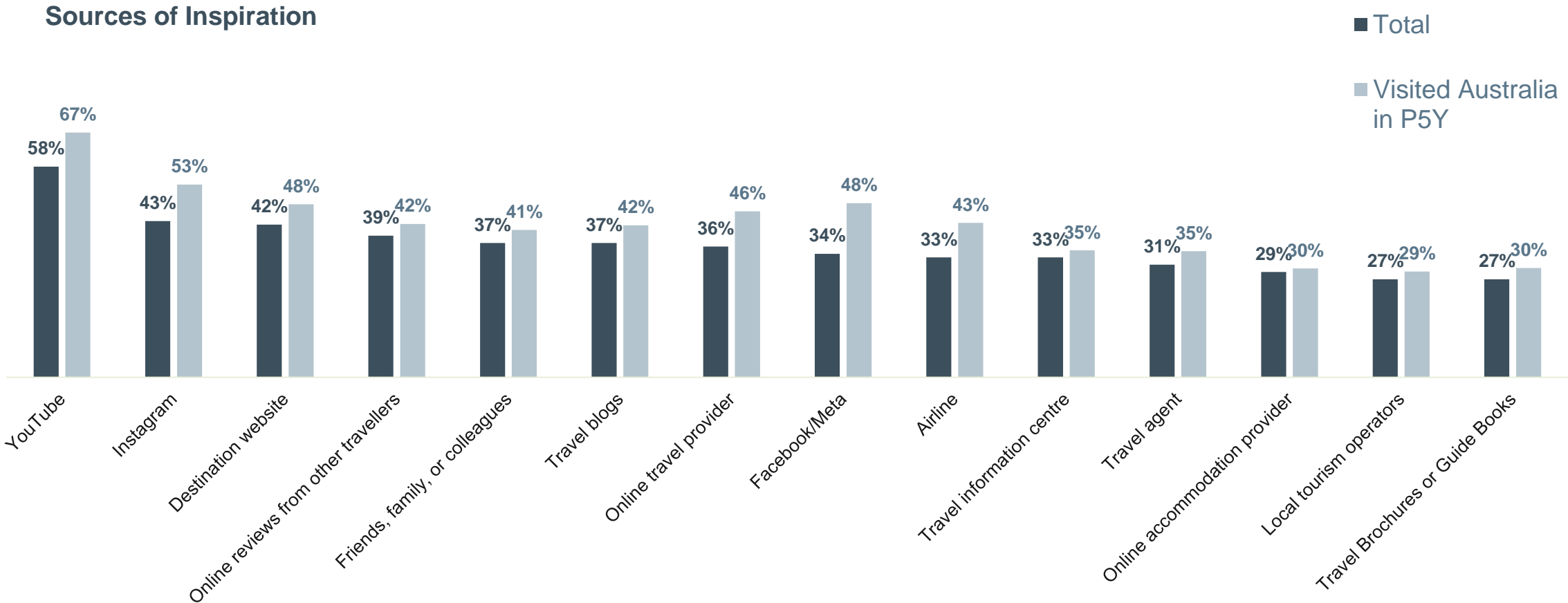
When looking, obviously there is Youtube and Instagram influencers, travel influencers, lifestyles influencers, whom I follow. So, with these people, I really follow them because they have genuine reviews. They actually make vlogs that I follow, and I look up places [after] because these vlogs are the actual reality of that place
- F, Gen Z, Visiting Family

SOCIAL NETWORKS USED



Q. Which of these social networking sites/ apps do you regularly visit?
Total Base n=972

Social Media also represents the key channel to engage with travellers looking for inspiration. Leveraging these platforms will help to intercept our HVTs during the planning phase of the consumer journey and put Tasmania on their radar for travel





Social media is used at multiple stages of the trip planning journey – providing inspiration, discovery and trusted reviews

Instagram and Google search are primary sources used for trending destinations and activities

For younger HVTs and those with teens/ young adults, social media plays a big role in inspiring where to go and what to see – showcasing the type of destination and providing them with insight on must do experiences, tips and tricks

Popular influencers and social media content shape decisions around destinations and drive appeal

- Too much hype can have a negative impact resulting in deterring some from travelling to locations that are overhyped and may become too crowded/ lack uniqueness

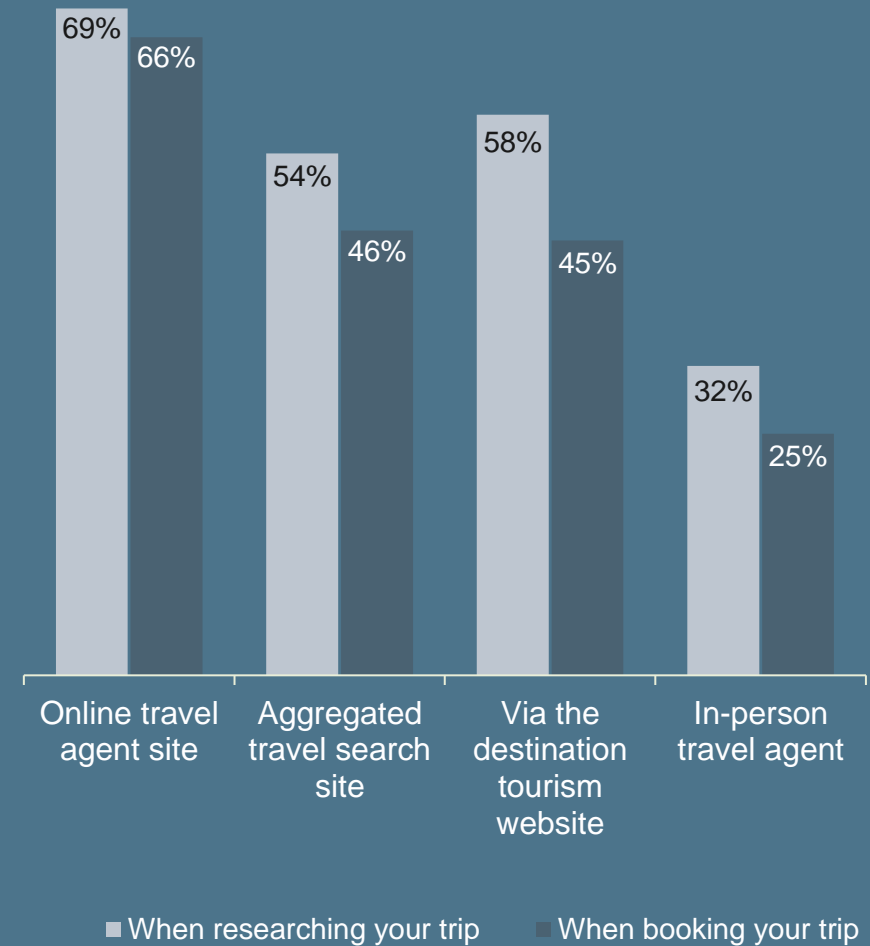
Instagram has been a huge part of my life. I'm always, on Instagram more than any other social platforms because I keep on, like, you know, learning things from there, what is trending, what is not trending. Then there are a lot of travel influencers whom I actually look upon to when they're traveling because there, they actually mention about the spots that you have to visit. Like, you know, the top ten places, the top ten, you know, cafes you should visit when you're here, the top ten hotels that you have to visit when you're here, the top ten places that you should see when you're here. F, Gen Z, Holiday Travel

Online travel agents, aggregated travel search sites, and destination websites are important for both stages of the booking journey, demonstrating the role that online plays in the travel journey



Ensuring Tasmania is a recommended / featured destination or place to visit will be key on these online platforms to generate greater awareness

Booking Platforms



Online travel agents and professional services are used by HVTs to provide trusted guidance, itinerary planning and managing the booking process

Providing detailed information on destinations, activities and accommodations. They are valued for the variety of options and the ease in the booking process. As a place of discovery, ensuring Tasmania is promoted through this channel is critical

Where travel arrangements are complex or where there are multiple people travelling, travel agents and OTAs are felt to make the process easier

Older HVTs especially prefer the simplicity of booking with an agent and having the hard work done for them

- Helping manage logistics, sharing transport, booking tickets, finding vegetarian foods

A combination of online, offline and traditional resources lets HVTs feel like they have control and can tailor the trip to their needs – while also making it easier

OTAs and resources mentioned

- Booking.com
- Make My Trip
- Cleartrip
- TripAdvisor
- Rome2Rio
- Official tourism websites
- Pick your trail
- Get your Guide

Executive Summary | Indian HVTs prioritise experiences that enable connection to nature, the local culture, food/drink, and people

Who are our HVTs?

Our HVTs are English and Hindi speaking families (4 in 5) who are frequent international travellers.

They are most likely to travel as a family unit or with their partners and when travelling to Australia in the past, stay on average around 2 weeks.

Our Indian HVTs prioritise experiences that enable connection to nature, the local culture, food/drink, and people and want once in a lifetime experiences.

They prioritise sustainability and strongly believe their actions can impact the world around them.

Where does Tasmania currently sit in their sphere?

Tasmania is currently a relative unknown for most Indian HVTs with only 1% of people mentioning the destination spontaneously.

Activities associated with connecting and exploring have the strongest link to Tasmania overall, however, there is a weaker connection between Tasmania and nature and food/beverage activities, key drivers for these travellers.

What are the opportunities for Tasmania?

Unique nature and wildlife as well as food and drink are fundamental drivers to travel with our Indian HVTs no different.

Any activity should focus in on this content to be most efficient at cutting through but ease and accessibility needs to be stressed in order to attract travellers who are less familiar with the destination as a whole. When showcasing food, ensure there is a variety of options, including vegetarian/vegan to accommodate for all cultural and lifestyle backgrounds.

How best can Tasmania leverage this market?

Tasmania's focus needs to be on driving awareness for the destination as part of travelling within Australia. Our Indian HVTs are considering Australia as a destination regardless but we need to ensure the linkage between Australia and Tasmania is strong whilst also highlighting our differences which make us a drawcard to travel while here.

Sustainability also represents a unique proposition for us as a destination and has strong appeal amongst this group.

To be most efficient when communicating, leverage social media/online as well as including group travellers in any consumer facing comms.

THANK YOU