

# UP-CLOSE ANIMAL ENCOUNTERS

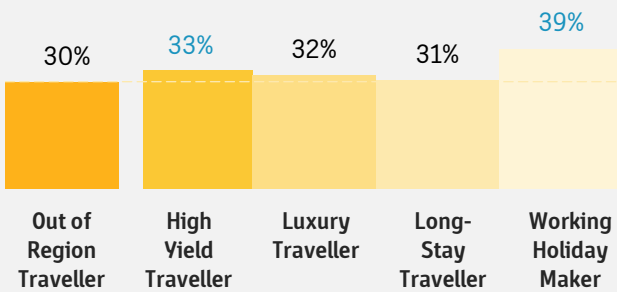
## NATURE • WILDLIFE

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



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

### INTEREST IN THE EXPERIENCE BY SEGMENT



### INTEREST IN EXPERIENCE ACROSS THE GLOBE

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

#### TRAVEL BEHAVIOUR PROFILE

GLOBAL TOTAL INTERESTED IN THIS EXPERIENCE

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



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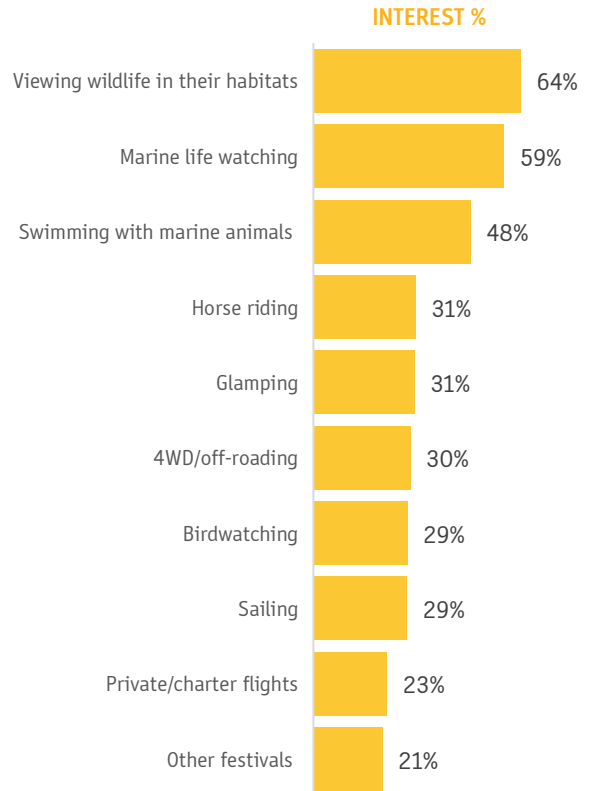


### DEMOGRAPHIC PROFILE

GLOBAL TOTAL INTERESTED IN THIS EXPERIENCE

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

### AFFINITY WITH OTHER EXPERIENCES (TOP 10)



### TRAVELLER TESTIMONIALS

#### WHY TRAVELLERS LOVE THIS

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

#### WHY SOME DO NOT

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

#### HERO DESTINATIONS

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

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

HIGH YIELD TRAVELLER, INDIA



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

HIGH YIELD TRAVELLER, UNITED STATES



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