

# VIEWING WILDLIFE IN THEIR NATURAL ENVIRONMENT

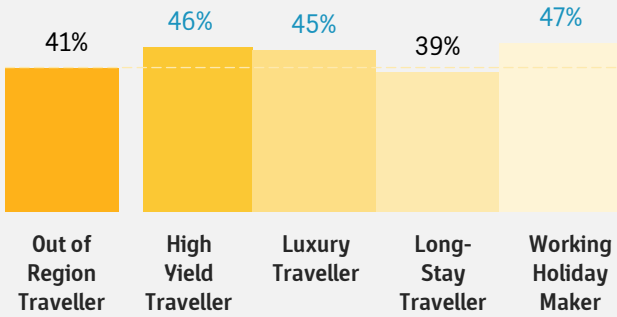
## NATURE • WILDLIFE

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



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

### INTEREST IN THE EXPERIENCE BY SEGMENT



### INTEREST IN EXPERIENCE ACROSS THE GLOBE

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

### TRAVEL BEHAVIOUR PROFILE

GLOBAL TOTAL INTERESTED IN THIS EXPERIENCE

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



# VIEWING WILDLIFE IN THEIR NATURAL ENVIRONMENT

## NATURE • WILDLIFE

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

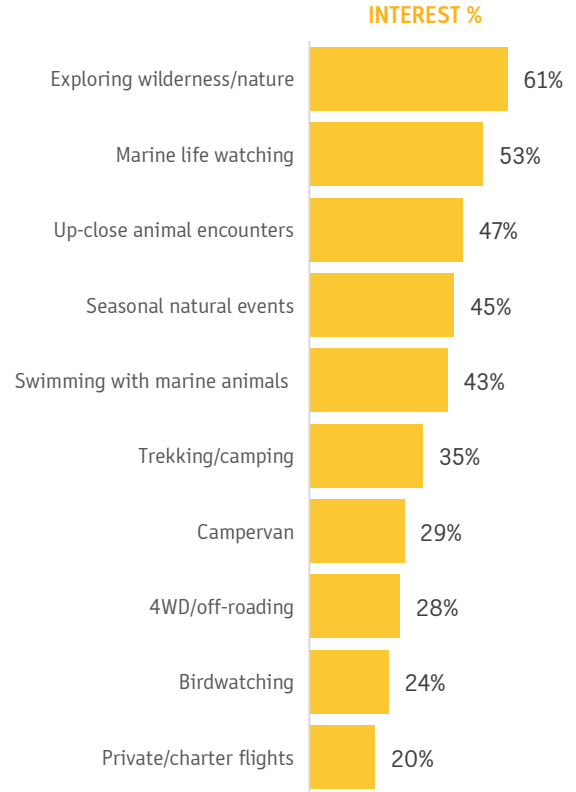


### DEMOGRAPHIC PROFILE

GLOBAL TOTAL INTERESTED IN THIS EXPERIENCE

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

### AFFINITY WITH OTHER EXPERIENCES (TOP 10)



### TRAVELLER TESTIMONIALS

#### WHY TRAVELLERS LOVE THIS

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

#### WHY SOME DO NOT

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

#### HERO DESTINATIONS

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

“

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

HIGH YIELD TRAVELLER, SINGAPORE



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

HIGH YIELD TRAVELLER, SOUTH KOREA



”

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.