

North America International Market Factsheet

Marketing Overview

The North American visitor market is the highest yielding international holiday market for the Northern Territory.

The *Northern Territory's Tourism Industry Strategy 2030* sets out high level targets based on the International Visitor Survey results and the 2030 target for the United States and Canada combined is 70,000 holiday visitors. This equates to a 3.2% compound average annual growth rate to 2030.

In 2019 the Northern Territory held a 5.2% share of the North American market of inbound arrivals to Australia. The market is strategically important due to their high spend, travel outside of the peak season and propensity to disperse into the regions.

Target Market Profile

1. Mature-aged market (aged 40-59 years) - high disposable income, experienced travellers without dependent children, who enjoy adventure and outdoors experiences.
2. Young professionals (25-39 years) - high propensity to travel long haul with a preference for travel to Australia, and who choose to travel for nature and wildlife, safety and security and food and wine experiences.

ALL PURPOSE	UNITED STATES		CANADA		NORTH AMERICA	
	2019	YOY CHANGE	2019	YOY CHANGE	2019	YOY CHANGE
VISITORS	37,000	-8.9%	12,000	+31%	49,000	-1.3%
NIGHTS	336,000	+12%	97,000	+122%	433,000	+26%
EXPENDITURE	\$77.9M	+6.6%	\$15.2M	+39%	\$93.1M	+11%
ALOS* (nights)	9.2	+1.7	8.0	+3.2	8.9	+1.9
ASPT (average spend per trip)	\$2,121	+\$307	\$1,250	+\$68	\$1,904	+\$208
VISITOR MARKET SHARE	4.8%	-0.6pp	6.8%	+1.4pp	5.2%	-0.2pp

*average length of stay

Strategic Opportunities

Consumer-facing campaigns to generate awareness, interest and demand

Protecting market share in a steadily growing outbound travel market

Growing the number of well dispersing, long staying and high spending visitors

Strengthening cooperation with trade partners

Training agents to increase their destination and product knowledge

Market Profile

ANNUAL LEAVE



2.5 WEEKS

TARGET REGIONS



Using heightened online profiling and targeting capabilities, targeting is primarily behavioural / contextual focused rather than geographically i.e. consumers who are displaying behaviour indicating they are planning travel to Australia.

SPECIAL INTERESTS

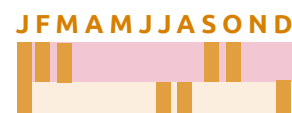


- Nature – Uluru, Kakadu and outback experiences
- Culture – Aboriginal and pioneer heritage
- Niche activities – Birding, fishing and soft adventure

SEASONALITY

KEY BOOKING PERIOD

PEAK TRAVEL PERIOD



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TRAVEL PARTY

59%

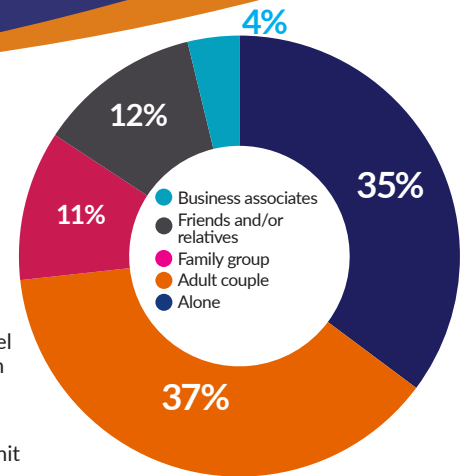
of North American all-purpose visitors were Free Independent Travellers (FIT)

72%

of North American visitors were travelling alone or as an adult couple

32%

of the visitor nights were in a hotel/ motel style accommodation while **33%** were at a rented house/ apartment / flat or unit



AVIATION



INTERNATIONAL AIRLINE ACCESS



CHEAPEST RETURN AIRFARES*

LOS ANGELES - DARWIN (1 STOP)

\$2,973

* Expedia - depart 1/12/19 and return 1/01/20

LOS ANGELES - DARWIN (1 STOP)

\$1,599

* Expedia - depart 1/05/20 and return 1/06/20

LOS ANGELES - ULURU (1 STOP)

\$2,536

* Expedia - depart 1/12/19 and return 1/01/20

LOS ANGELES - ULURU (1 STOP)

\$1,742

* Expedia - depart 1/05/20 and return 1/06/20

Distribution

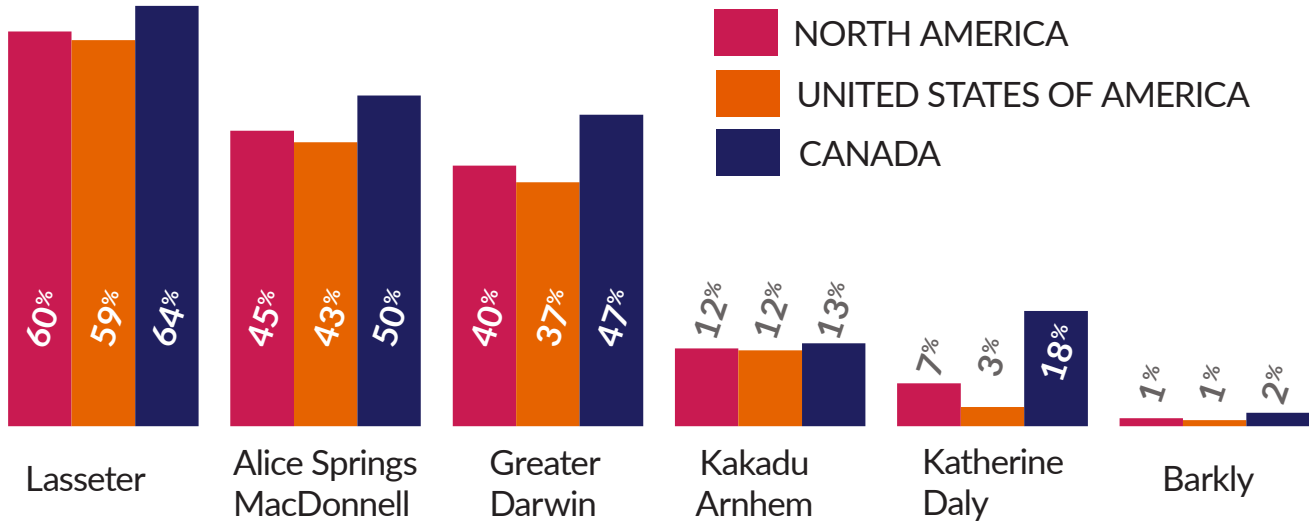
- About Australia
- Aspire Down Under
- Collette Vacations
- Down Under Answers
- Flight Center Travel Group - Liberty Travel, Gogo Vacations, Flight Center
- Goway Travel Limited
- Springboard Vacations Inc
- Helloworld USA - Qantas Vacations and Travel2
- Swain Destinations
- Virtuoso

Major Online Travel Agents

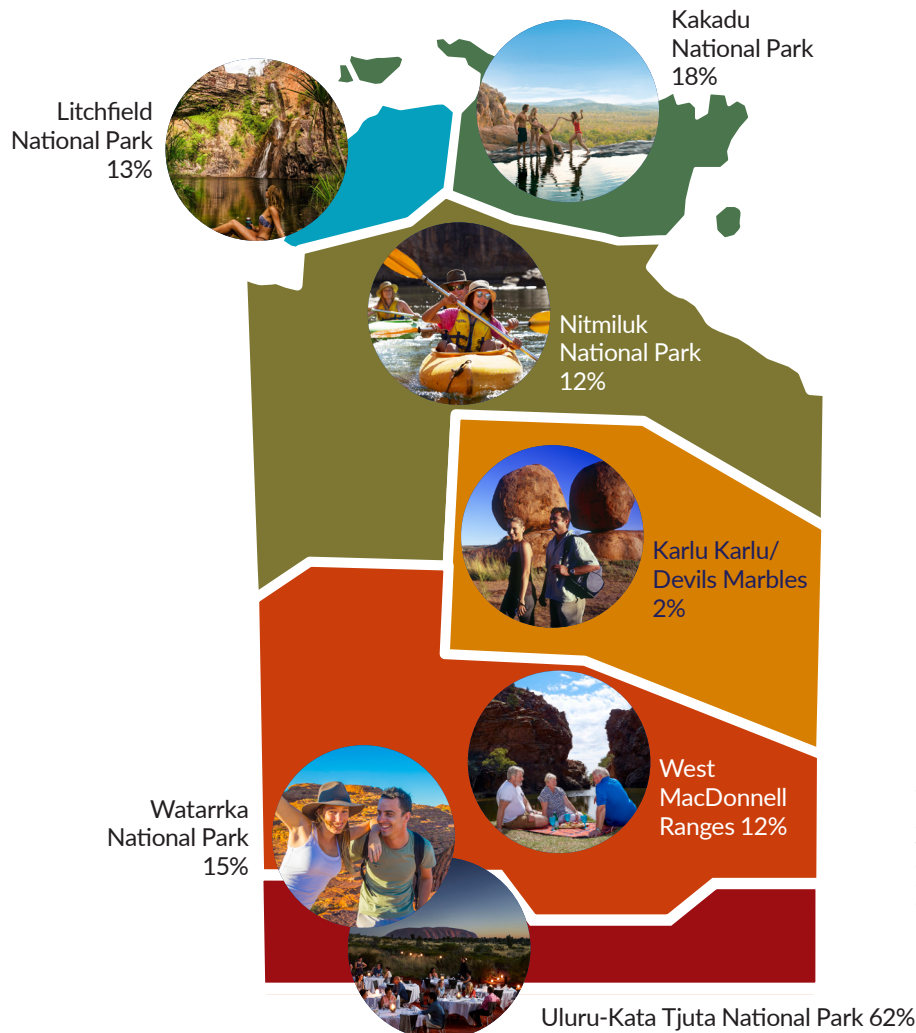


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Overnight visitors to NT regions



Visitors to NT destinations - overnight and day trips



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