



# In it for the long haul

## UK Market Segmentation





## How can you use the information in this flyer?

The information in this flyer is a great starting point for getting to know the target segments. Specifically, the information will help you to:

- Create strong, effective value propositions
- Craft marketing messages for greatest effect
- Identify segment marketing opportunities
- Determine the effectiveness of communications channels
- Get inspiration for new product ideas

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# In it for the long haul:

## Introducing the UK market segmentation

The United Kingdom is one of Australia's most important inbound travel markets and is Australia's second largest visitor source market overall. The market has grown steadily in recent years and is predicted to continue to grow by an average of 4.3 per cent each year to 2013.<sup>1</sup> In calendar year to date September 2004, the UK became Australia's third largest source of visitors, with 442,500 arrivals (holiday 203,330/VFR 157,256).

In this context there is a fantastic opportunity to grow our share of the long haul market by increasing the effectiveness of our marketing and the product experiences we offer: by showing UK travellers a view of Australia that is desirable and motivating – that resonates at an emotional level, and by promoting tourism product experiences that allow travellers to engage with Australia in a way that is consistent with their motivations for visiting our country.

To do this, we need to be able to answer questions such as 'Who should we target in the UK market?' 'What do they want from long haul travel?', 'What makes a destination attractive to them?' and 'How does a trip to Australia meet their needs?'

This flyer gives you some answers to these questions. It's based on a comprehensive market research study of the UK travel market conducted by the Destination Australia Marketing Alliance (DAMA)<sup>2</sup> in early 2004. The study was designed to identify and prioritise the key target segments for the UK long haul travel market.<sup>3</sup>

The study has helped us to develop a new understanding of the UK long haul travel market—an understanding which goes beyond life-stage and demographic factors, and instead is based on the emotional and personal drivers behind people's travel choices. The insights we have gained will form the foundation of Brand Australia's segment marketing strategy in the UK over the next three to five years.

### Why did we segment the UK market?

The importance of market segmentation results from the fact that the buyers of a product or a service are not a homogenous group; every buyer has individual needs, preferences, and behaviors. Since it is virtually impossible to cater for every customer's individual characteristics, by grouping customers into segments we can group people by the most distinguishing variables they have in common and likeminded behaviours towards long haul travel.

It's fair to ask what purpose is served by segmenting the UK travel market. After all, the number of UK travellers visiting Australia is not only high but growing; UK travellers' average daily spend has increased by more than a quarter since 2000; and dispersal is running steady at just under 30%. Why did we need to develop a segmentation of such a strong market? Here are three reasons for why DAMA invested in this consumer study.

<sup>1</sup> Tourism Forecasting Council, *Forecast*, December 2004,

<sup>2</sup> The Destination Australia Marketing Alliance (DAMA) is an alliance between the State and Territory Tourism Office and Tourism Australia. The objective of DAMA is to enable Tourism Australia and the State and Territory Tourism Offices to work together to maximize the potential of inbound tourism to Australia.

<sup>3</sup> The total size of the UK long haul traveller market is 15 million individuals, representing 37% of all 18-75 year olds in the UK. This is based on the sample definition of 18-75 year olds who have either travelled long haul in the past five years or intend to in the next two.





## Segmentation helps us to:

### 1. Maximise the return on investment of our marketing activity

Segmentation helps us to identify segments in the UK market where the return on investment for our marketing dollar will be greatest. By profiling the market segments, we can identify which segments will be most receptive to what Australia has to offer, which will provide the greatest yield, and which are most likely to disperse. Our marketing activity can then be directed at those segments, rather than at the market as a whole and we can better direct our marketing funds by more efficient targeting.

### 2. Understand the market better

By segmenting the market we can understand the UK travel market better. We understand why travellers visit Australia and why they don't. We identify which travellers are most likely to come here, and which travellers won't. We learn how they plan and book their holidays, where they get information, what they like to do on holiday and much more. All this information helps us to develop more effective marketing campaigns and more attractive tourism product.

### 3. Communicate more effectively to our target segments

Developing consumer insight based segmentation produces a huge amount of information about the emotional and rational motivations that drive people's travel choices. It also provides us with insight into where the segments look for travel information and what media channels they pay most attention to. This information enables us to develop marketing communications campaigns that are specifically designed to reach our target segments and to communicate messages that they find powerful and motivating.

## What segments are there in the UK market?

There are many ways to segment a market: by life-stage, attitudes, needs, behaviours or just about any other consumer characteristic you can imagine. The best segmentations have these aspects in common:

- The segments are easy to identify and access in the marketplace;
- They are sufficiently large, valuable and distinct to justify a dedicated marketing strategy;
- The segments are sustainable over time.

In segmenting the UK travel market we looked to develop a segmentation model that could provide the foundation for a full range of marketing programs and strategies including brand communications, media planning, promotions, public relations, product development and our international media programs.

Taking these factors into account, **we identified five distinct segments in the UK long haul travel market:**

- Self-Challengers
- Comfort Adventurers
- Cocoon Travellers
- Taste and Try
- Pushing Boundaries

The segments are distinguished by their travel experience on the one hand, and their attitudes to travel and the style of travel experience they seek on the other. Almost every long haul traveller in the United Kingdom can be allocated to one of the five segments we've identified. Together, the five segments account for more than 15 million people. That's a third of the population of Great Britain aged 18–75!

Over the next few pages, we'd like to introduce you to the five segments and share with you the key characteristics that set each segment apart from the rest of the long haul market in the UK.

# Introducing Self-Challengers



*'Travel is a consuming passion for me. It's pretty much fair to say that I live for travel and so I'm always thinking about where I want to go to next'* Penny, 27

Meet our Self-Challengers. For Penny, Darry, Simon and Kath, travel is an absolutely central part of life. And, when Self-Challengers talk travel, they're not talking holidays on the beach. As the name of this segment suggests, Self-Challengers have a drive to challenge themselves, are extremely experienced, passionate travellers and embrace the idea of exploring and immersing themselves in the culture and lifestyle of the destination. They seek destinations that are as different from home as possible and they don't mind roughing it a bit — it's all part of the challenge! Self-Challengers also don't mind going it alone if they can't find a travel buddy. For Self-Challengers the best travel experiences are the ones when they can immerse themselves into other cultures and understand how local people live.

## Segment highlights

<b>Segment size</b>	1.8 million long haul travellers/12% of the long haul market
<b>Heart of the segment</b>	Travel fulfils a personal drive to challenge themselves and the reward is intensely personal
<b>Profile</b>	Compared to the rest of the long haul travel market in the UK, Self-Challengers: <ul style="list-style-type: none"><li>• Are more affluent and highly educated</li><li>• Have a higher income</li><li>• More likely to be single</li><li>• Have the greatest range of interests including eating out, reading, music concerts, hiking, DIY, theatre, self-education, outdoor and water sports, photography and more</li><li>• Range between 18-75 years</li></ul>
<b>Approach to long haul travel</b>	When travelling abroad, immersion in the local culture, lifestyle, and environment is key for Self-Challengers. They definitely perceive themselves as travellers, not tourists, and are focused on experiencing destinations before they become part of a tourist trail. Self-Challengers are focused on self-discovery through challenging experiences and want to get 'under the skin' of a destination.
<b>Australia as a destination</b>	Australia is undoubtedly a very appealing long haul destination for Self-Challengers. This segment has no major barriers to visiting Australia. Instead they are attracted by the natural environment, the people and indigenous culture and are highly knowledgeable of Australia as a holiday destination.
<b>What inspires them?</b>	When deciding where to go on their next holiday, the top sources of destination inspiration for Self-Challengers are TV documentaries and Travel books.

*'There is a sense of adventure as well when you've climbed up something. It gives you a great sense of achievement.'* Darry, 46 (on physical challenge)



*'I agree that it's not a holiday unless I come back exhausted!'* **Kath, 45 (on relaxation)**

#### How do I reach them in the media?

Self-Challengers media preferences include:

- Reading the Sunday Times.
- They always read the travel and arts sections of the newspaper
- More likely to listen to the BBC, especially BBC Radio 2, BBC Radio 4 and Classic FM, which they are the biggest listeners of compared to the other segments.
- Watching documentaries, news and current affairs, and wildlife programs on TV
- Going to the cinema, once or twice a month
- They have the least amount of TV usage compared to the other segments
- Least likely to read magazines
- They are the biggest internet users of all the segments, many using it daily for various personal purposes.

#### Planning timeline

On average, self challengers have a short planning cycle compared with other long haul travellers. This is also true for their flight booking and accommodation booking timelines.

Start planning: 25 weeks before departure

Book flights: 16 weeks before departure

Book accommodation: 13 weeks before departure

#### Planning sources

Self-Challengers use a wide range of information sources for planning their holidays, including internet travel sites, friends and family, airline websites, newspapers, magazines and travel guides.

#### Travel profile

On a long haul trip, Self-Challengers are more likely to:

- Travel by themselves
- Travel for about three weeks and the highest proportion of all segments to travel for 8 weeks or more
- Stay in budget to moderate accommodation, including hotels, hostels, and bed and breakfasts.
- Spend about £80 a day per person
- Have lower than average spend per day but the longest length of stay (3 weeks)

*'I hate being on a schedule. Although if a bus tour was the only way to get somewhere, I guess I'd take it.'* **Simon, 31 (on organised travel)**





*'I don't want to be treated like a tourist. I want to understand how people live, be part of their everyday lives'* **Faith 52 (on independent travel)**

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**Holiday activities**

Self-Challengers' have a wide range of holiday activities and they sometimes plan their holidays around:

- Walking or hiking
- Nature and wilderness activities
- Local food and wine
- Cultural events
- Visiting gardens
- Bird and animal watching
- Exploring the country
- Getting to know the local people

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**Destinations they would really like to visit/are seriously consider going to**

Australia  
New Zealand  
Canada  
South Africa  
Thailand  
China

Argentina  
China  
Nepal  
Kenya/Tanzania  
Ukraine/Russia  
Brazil

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*'Next time I'll do India on my own – I want to spend more time in places I choose.'* **Geoff, 61 (on independent travel)**

# Introducing Comfort Adventurers



*'I love travelling; it's quite a big part of my life. It's genuinely interesting to get a taste of very different cultures and get a glimpse of how people live. Of course, when I travel, it's a holiday too, so I like to spoil myself a bit'* Wendy, 47

Meet Wendy, Philip, Michael and Pam, our Comfort Adventurers. This segment of the market loves to travel, and they do so as often as they can, they are 'civilised' adventurers and confident, experienced long haul travellers. For Comfort Adventurers, travel is an opportunity to experience some very different cultures and see how other people live, some immersion is desirable but they do not want to live like the locals. Most importantly it's also an opportunity for a holiday! Comfort Adventurers don't want to return home exhausted, so they treat themselves a bit while they're away. For this segment of the market, travel is an opportunity for a bit of rest and relaxation, a bit of sightseeing and a lot of immersion into 'the real country' and also making the most of good tourism infrastructure.

## Segment highlights

<b>Segment size</b>	2.7 million long haul travellers/18% of the long haul travel market.
<b>Heart of the segment</b>	They seek to experience the unique and unusual without compromising their creature comforts
<b>Profile</b>	<p>Compared to the rest of the long haul travel market in the UK, Comfort Adventurers:</p> <ul style="list-style-type: none"><li>• Are slightly older (average age: 47)</li><li>• More likely to be retired</li><li>• More likely to be empty nesters</li><li>• More likely to be married</li><li>• More highly educated</li><li>• Have a wide range of interests including eating out, reading, gardening, theatre and photography.</li></ul>
<b>Approach to long haul travel</b>	Comfort Adventurers want to see destinations before they're discovered by masses of tourists. They make sure they see the iconic sights and get "under the skin" of their destination. Safety is important to them, and they like to travel in comfort and enjoy some luxuries.

*'I need to know my hotel will have all the comforts in case I need them ... but I'll hardly ever use them!'* Wendy, 47 (on good hotels)





*'Cuba is communist and it will fade away into the future. This is the last chance to see it.'* Philip, 29 (on seeing the authentic country)

<b>Australia as a destination</b>	Comfort Adventurers know a lot about Australia and are attracted by the country's natural environment, world heritage areas, city life and people. Australia's huge variety of unique wildlife and natural wonders together with the modern and cosmopolitan cities are major drivers for comfort adventurers.
<b>What inspires them?</b>	<p>When deciding where to go on their next holiday, the top sources of destination inspiration for Comfort Adventurers are</p> <ul style="list-style-type: none"> <li>• Newspapers</li> <li>• Specialist travel magazine</li> <li>• Family who live there</li> </ul>
<b>How do I reach them in the media?</b>	<p>Here are the best media sources in which to reach the Comfort Adventurers:</p> <ul style="list-style-type: none"> <li>• More likely to read the Local newspapers and the Daily Telegraph (Less likely to be reading the Sun)</li> <li>• They pay particular attention to the travel, business and arts sections of the newspaper.</li> <li>• They are more likely to read TV and entertainment magazines, hobby and leisure magazines, motoring magazines, National Geographic, Airline magazines and IT magazines</li> <li>• They are above average consumers of National Geographic and online magazines</li> <li>• More likely than other segments to listen to BBC4, local BBC stations, and Classic FM</li> <li>• Their TV viewing preferences include watching documentaries, holiday and travel shows, drama, news and current affairs, and wildlife programs</li> <li>• They are the heaviest TV viewers compared to the other segments</li> <li>• Least frequent cinema goers</li> </ul> <p>Their levels of internet penetration and use are average, and they are most likely to access the internet at home.</p>
<b>Planning timeline</b>	<p>Start planning: 26 weeks before departure</p> <p>Book flights: 19 weeks before departure.</p> <p>Book accommodation: 17 weeks before departure.</p>

*'I have more sense of adventure when I'm away. At home, I'm usually the least adventurous in the group. But when I'm away, there's something inside me that is scared, but I do it!'* Andrea, 21 (on feeling adventurous)



*'You'd feel like you were being herded around with all the tourists. I like to see other things.'* Michael, 56 (on bus tours)

<b>Planning sources</b>	<p>Comfort Adventurers' main sources of planning information are newspapers and magazines, airline magazines, internet travel sites, airline websites and travel agents.</p> <p>A key trait of this segment is they are open to marketing influences and are very likely to respond to publicity, promotions and branded destination messages.</p>	
<b>Travel profile</b>	<p>On a long haul trip, Comfort Adventurers are likely to:</p> <ul style="list-style-type: none"> <li>• Travel with their spouse or partner</li> <li>• Travel for about two weeks</li> <li>• Stay in moderate to luxury hotels, and very unlikely to stay in Backpacker and budget hotels or hostels.</li> <li>• Spend almost £120 a day per person</li> <li>• Total spend of £2,005 per trip, significantly highest of all the segments</li> </ul>	
<b>Holiday activities</b>	<p>Comfort adventurers favourite holiday activities are:</p> <ul style="list-style-type: none"> <li>• Enjoying good food and wine</li> <li>• Shopping</li> <li>• Walking or hiking</li> <li>• Visiting gardens</li> <li>• Photography</li> <li>• Sightseeing</li> </ul>	
<b>Destinations they would really like to visit/are seriously consider going to</b>	<p>Australia</p> <p>Spain</p> <p>France</p> <p>North America</p> <p>New Zealand</p> <p>South Africa</p>	<p>Thailand</p> <p>Hong Kong</p> <p>Malaysia</p> <p>China</p> <p>Singapore</p>

*'Everyone else in the world seems so much more relaxed. I come back refreshed and have more goals'* Pam, 39 (on seeing other ways of life)

# Introducing Cocoon Travellers



*'I really look forward to my holidays. The thing is I know exactly what I want from a holiday so it's worth the effort in getting it right, especially as I like to go to different places each time'* **Martin, 35**

Cocoon travellers like Martin, Karenza, Chris, and Barbara holiday regularly. Holidays play a big role in their life and they like to go somewhere new each time they travel, but they don't like anywhere too challenging. Cocoon travellers have firm ideas of what they want from a holiday and they don't like to leave things to chance. They are happy to spend money to ensure their holiday is a smoother, easier experience. They research where to stay and what to see and do, and they book as much as possible before they leave home. They prefer to holiday in places that are safe and where the facilities are hygienic and comfortable. They often are 'trophy collectors' when it comes to travel, crossing off destinations as they visit them.

## Segment highlights

<b>Segment size</b>	1.8 million long haul travellers/12% of the long haul travel market.
<b>Heart of the segment</b>	Superior holiday experiences are personally satisfying and affirm their status as travellers.
<b>Profile</b>	Compared to the rest of the long haul travel market in the UK, Cocoon Travellers: <ul style="list-style-type: none"><li>• Are more affluent</li><li>• Have higher than average incomes</li><li>• Are more likely to be married</li><li>• Are less likely to have children living with them</li></ul>
<b>Approach to long haul travel</b>	Cocoon Travellers are most interested in relaxing when they travel. They don't want to leave anything to chance and good tourism infrastructure is important to them.  They're happy to be considered tourists and are not actively seeking an immersive, authentic experience of another culture – they are not interested in self discovery or personal challenge when they travel.
<b>Australia as a destination</b>	Cocoon Travellers are drawn towards Australia because it is often one of the destinations in their portfolios that they have always wanted to visit. But, Australia holds more of a generic appeal for Cocoon Travellers, with no distinctive drivers of that appeal.
<b>What inspires them?</b>	When deciding where to go on their next holiday, the top sources of destination inspiration for Cocoon Travellers are magazine articles/travel sections and to some degree friends/family who have been there and TV travel programmes.

*'I would love to do something this daring, but I have vertigo.'* **Karenza, 40 (on adventure)**





*'Accommodation is very important. Seventy per cent of your time is spent in your resort. I will always spend the money as once I had a bad experience. The accommodation was so bad it ruined my holiday'. Chris, 24 (on good accommodation)*

#### How do I reach them in the media?

Here are the best media sources in which to reach the Cocoon Travellers:

- Sunday times and the Sunday mirror
- TV and entertainment magazines and Marie Claire
- Films, documentaries, and house and garden programs on TV
- Of all the segments, Cocoon Travellers are the most frequent cinema goers, with some going weekly

They are the lowest frequency internet users and when they do go online, it is usually to check their stocks, shares, investments or banking.

#### Planning timeline

Cocoon Travellers show planning behaviour that reflects the same patterns as for most other long haul travellers.

Start planning: 28 weeks before departure

Book flights: 22 weeks before departure.

Book accommodation: 24 weeks before departure.

#### Planning sources

Cocoon Travellers' main sources of planning information are high street travel agents and internet travel sites. Newspapers are used for destination inspiration and internet travel sites for accommodation research. When researching a destination, however, internet airline sites are more likely to be used, suggesting a deal based approach to choice.

#### Travel profile

On a long haul trip, Cocoon Travellers are likely to:

- Travel with their spouse or partner
- Travel for about two weeks, more likely between 8 – 10 days
- Stay in moderate to luxury hotels or with family
- Spend almost £100 a day per person
- Total spend is £2,033 per trip, slightly higher than the average long haul population

#### Holiday activities

Cocoon travellers favourite holiday activities are:

- Enjoying good food and wine
- Relaxing by the beach/pool
- Shopping
- Sightseeing
- Walking or hiking
- Golf

#### Destinations they would really like to visit/are seriously consider going to

Australia  
New Zealand

North America  
South Africa

*'I'm cocooned in semi-luxury. I get a buzz from going to a different place, but I'm not really an explorer.'* Barbara, 52 (on resorts)

# Introducing Taste & Try



*'I haven't yet travelled outside Europe, but I'm now planning a longer trip for the first time. I've enjoyed my holidays in Europe, but think the time is right to spread my wings a bit and experience something else'* Tim, 35

Meet Tim, Jane, Simon and Lorraine. Each of them is about to take a long haul trip for the first time. They're part of the Taste & Try segment. Up until now, they've only visited destinations that are fairly close by: Europe, North Africa and Florida. But now, they're ready to spread their wings and experience something new. They've got some ideas about the kind of holiday they're after from their experience of holidaying in Europe. Now they're ready to test out those ideas in a less familiar environment.

## Key Segment Characteristics

<b>Segment size</b>	2.7 million long haul travellers/18% of the long haul travel market.
<b>Heart of the segment</b>	The excitement of seeing the wider world with their own eyes for the first time.
<b>Profile</b>	<p>Compared to the rest of the long haul travel market in the UK, Taste &amp; Try travellers:</p> <ul style="list-style-type: none"><li>• Are more likely to be younger than the average long haul traveller – there are more of them aged under 24 and fewer of them aged between 45 – 54 years</li><li>• Are less educated and less affluent</li><li>• Have less holiday leave available</li><li>• Have a lower income</li><li>• Do not have as strongly defined interests and hobbies</li></ul>
<b>Approach to long haul travel</b>	<p>Taste &amp; Try travellers are inexperienced long haul travellers who are attracted to “trendy” well known destinations. They rely heavily on recommendations from others about where they go and what to do.</p> <p>Relaxation, sightseeing and fun—sun, sea, sand and nightlife—are important to them.</p> <p>Interaction with other travellers is also important to them when they go on holiday.</p>
<b>Australia as a destination</b>	<p>Taste &amp; Try travellers have never visited Australia, but Australia holds high aspirational appeal for the segment. For many, Australia is seen as a once in a lifetime opportunity.</p> <p>Lack of knowledge, distance and the attractiveness of competing destinations are the biggest barriers.</p>

*'At the moment I've got an open mind about the type of holidays I'll enjoy most.'* Jane, 22 (on holidays)



*'I think of the programs on TV of the 100 things to do before I die. I want to feel like I've been on a long journey.'* **Simon, 24 (on travelling long haul for the first time)**

<b>What inspires them?</b>	<p>The top sources of destination inspiration for the Taste &amp; Try segment are:</p> <ul style="list-style-type: none"> <li>• TV travel programs</li> <li>• Friends who have been to the destination</li> <li>• Family who live at the destination</li> <li>• Tour operator brochures</li> </ul>	
<b>How do I reach them in the media?</b>	<p>Taste &amp; Try travellers pay most attention to the following media:</p> <ul style="list-style-type: none"> <li>• They are more likely to read the Sun and Daily Mirror</li> <li>• Read TV, entertainment, hobby and leisure magazines</li> <li>• Listen to BBC1 and commercial radio stations</li> <li>• Watch films and documentaries on TV</li> </ul> <p>Taste &amp; Try are least likely than other long haul travellers to turn to the travel section of their newspapers.</p> <p>The level of internet penetration and use among Taste &amp; Try travellers is comparable with the long haul travel market as a whole (86 per cent of all UK potential long haul travellers have internet access).</p>	
<b>Planning timeline</b>	<p>Taste &amp; Try travellers have a lengthy planning phase before travelling; their sheer inexperience means that their planning process is much longer than other long haul travellers (average length of planning process is 20 weeks).</p> <p>Start planning: 35 weeks before departure  Book flights: 26 weeks before departure  Book accommodation: 24 weeks before departure.</p>	
<b>Planning sources</b>	<p>The Taste &amp; Try segment relies heavily on high street travel agents at all stages of the planning and booking process. Half book all their accommodation in advance. They are much less likely to go to airlines or accommodation providers direct to book.</p>	
<b>Holiday activities</b>	<p>Taste &amp; Try travellers plan their holidays around:</p> <ul style="list-style-type: none"> <li>• Food and wine</li> <li>• Relaxing by the beach/pool</li> <li>• Activities for children</li> <li>• Shopping</li> <li>• Nightlife</li> </ul>	
<b>Destinations they would really like to visit/are seriously considering going to?</b>	<p>Australia</p> <p>Spain</p> <p>New Zealand</p>	<p>Florida</p> <p>Caribbean</p>

*'I want to see things and have it explained to me.'* **Lorraine, 55 (on sightseeing)**



# Pushing Boundaries



*"I'm not a very experienced traveller, at least where places outside Europe are concerned. However, what I have seen has given me the travel bug and now I'm very keen to see a lot more of the world"* Nitasha, 25

Meet Nitasha, Rosie, Suzanne and Alex. They are members of the Pushing Boundaries segment. These travellers have taken one or two long haul trips and they've caught the travel bug! They have some ideas about the kind of travel they do and don't like, but at the moment they're more concerned with visiting as many places and having as many new experiences as possible.

## Segment highlights

<b>Segment size</b>	6 million long haul travellers/40% of the long haul travel market.
<b>Heart of the segment</b>	They have caught the travel bug and are hungry for more.
<b>Profile</b>	Compared to the rest of the long haul travel market in the UK, the Pushing Boundaries traveller segment: <ul style="list-style-type: none"><li>• Are more likely to be aged 25 – 34 years</li><li>• Are less likely to be in the top social grade</li><li>• Have slightly lower incomes</li></ul>
<b>Approach to long haul travel</b>	Pushing Boundaries travellers like to travel with more experienced travellers so that they can benefit from someone else's knowledge and experience.  They have already done some travelling before, however, they are still determining the type of traveller they really want to become and this will eventually be determined as their travel experience increases.
<b>Australia as a destination</b>	The Pushing Boundaries segment are warm to the idea of visiting Australia one day, however, compared with other destinations, Australia is perceived as somewhat familiar and therefore less interesting and compelling.  For this segment, lack of knowledge about Australia is the greatest barrier to visitation
<b>What inspires them?</b>	Pushing Boundaries travellers are inspired to visit destinations by: <ul style="list-style-type: none"><li>• Friends who have been there</li><li>• Family who live at the destination</li><li>• TV travel programs</li><li>• Tour operator brochures</li><li>• Specialist travel magazines</li><li>• Radio programs</li></ul>

*'A friend got dysentery in India and that's a bad experience that I wouldn't want. It's the hardest place I can imagine.'* Nitasha, 25 (On the challenges of travelling)



*'I need to know where I'm going, but there's this other part of me that I really don't want to be a tourist.'* **Suzanne, 42 (on travellers and tourists)**

**How do I reach them in the media?**

Pushing Boundaries travellers pay most attention to:

- The Sun and Daily Mirror
- TV, entertainment, hobby and leisure magazines
- Listening to BBC1 and commercial radio stations
- Watching films and documentaries on TV

The level of internet penetration and use among Pushing Boundaries travellers is comparable with the long haul travel market as a whole.

They rarely read the travel section of the newspapers and are least likely to watch travel and holiday programs on TV.

**Planning timeline**

Start planning: 29 weeks before departure

Book flights: 22 weeks before departure

Book accommodation: 21 weeks before departure.

**Planning sources**

Pushing Boundaries travellers make use of high street travel agents at all stages of the planning and booking process. They are less likely than other segments to book flights or accommodation directly.

**Travel profile**

On a long haul trip, Pushing Boundaries travellers are likely to:

- Travel with their spouse or partner, or other family members
- Travel for about two weeks
- Spend just over £80 a day per person
- Have the lowest average spend per trip (£1,530)

**Holiday activities**

Pushing Boundaries travellers' favourite holiday activities are:

- Enjoying good food and wine
- Shopping
- Nightlife

**Destinations they would really like to visit/are seriously consider going to**

Australia

Spain

New Zealand

Caribbean

Canada

South Africa

*'This trip I am going with a friend who has never been out of Europe. This time I will be the guide.'* **Alex, 21 (on getting more experience)**



# Identifying our most valuable segments

DAMA has put a lot of work into identifying which of the five segments offer the most potential for Australian tourism. We used a commercial ranking model to determine the potential value of each segment. The five segments were rated according to:

- Predisposition to long haul travel
- Size and make-up of the travel party
- Length of stay
- Type of accommodation used
- Holiday activities

- Propensity to disperse
- Spend
- Size of the segment
- Openness to marketing influence

The table below summarises the commercial model based on these measures, and uses a 'tick' shorthand to illustrate the comparative strengths for each segment. Three ticks for the highest value, two ticks for moderate value and one tick for the lowest value comparatively for each measure.

	Taste & Try	Pushing Boundaries	Cocoon Travellers	Comfort Adventurers	Self-Challengers
Segment size	✓✓	✓✓✓	✓	✓✓	✓
Predisposition to long haul travel	✓	✓	✓✓	✓✓✓	✓✓✓
Travel party	Not applicable	✓✓	✓✓✓	✓✓	✓
Length of stay	Not applicable	✓	✓✓	✓	✓✓✓
Accommodation	Not applicable	✓	✓✓	✓✓✓	✓
Holiday activities	Not applicable	✓	✓	✓✓	✓✓✓
Propensity to disperse	Not applicable	✓✓	✓	✓✓	✓✓✓
Daily spend	Not applicable	✓	✓✓	✓✓✓	✓
Openness to marketing	✓✓✓	✓✓✓	✓✓	✓✓✓	✓✓
Ease of reaching the segment	✓✓	✓✓	✓✓	✓✓	✓✓✓

Key:

Not applicable

✓

✓✓

✓✓✓

Have yet to travel long haul

Lowest value comparatively

Moderate value comparatively

Highest value comparatively





### DAMA's priority segments

On the basis of the commercial ranking analysis, DAMA has chosen to target two of the five segments: Comfort Adventurers and Self-Challengers. These two segments clearly have the greatest potential to generate income for Australian tourism and to deliver a good return on our marketing investment.

In addition, Comfort Adventurers and Self-Challengers are desirable target segments because:

- They know something about what Australia has to offer, so the education task is easier;
- They offer the best fit with Australia's brand strategy;
- They are used to travelling all over the world — that's what they love to do — so the usual barriers of cost and distance are much less important to them;
- They have the greatest potential to travel to Australia in the short to medium term.

For all these reasons, we believe that marketing Australia to Comfort Adventurers and Self-Challengers represents the most sustainable strategy for Australia over the medium term.

### What about the other segments?

You may be wondering what this means for the other three segments: Taste and Try, Pushing Boundaries and Cocoon Travellers. Members of these segments will still visit Australia and the segments may well be appropriate targets for parts of the Australian tourism industry.

The Taste and Try and Pushing Boundaries segments share many of their attitudes to travel with Comfort Adventurers and Self-Challengers. In fact, with more travel experience, these travellers are likely to become part of the Comfort Adventurer or Self-Challenger segments. For this reason, DAMA's marketing communications are likely to appeal to these travellers too.

Cocoon Travellers are an important segment of the market. While they will not be a key focus for DAMA, this lucrative segment offers a potential opportunity for parts of the Australia tourism industry because:

- they have the highest tendency to buy direct from holiday companies;
- are less responsive to emotional destination brand messages and are more susceptible to deals; and
- are good yield prospects.

Those who can offer Cocoon Travellers a high quality, relaxing holiday - for example, resorts and branded properties may - well benefit from targeting this group of travellers.