

well travelled *informed*  
**SELF-FULFILLED**

A Uniquely Australian Invitation  
*The Experience Seeker*

**engaged** *selective*  
**inquisitive**  
*opinion leaders*  
**WELL TRAVELLED**  
**open-minded**

**INFORMED** *inquisitive*

**ADVENTUROUS**



# Australia's ideal visitor

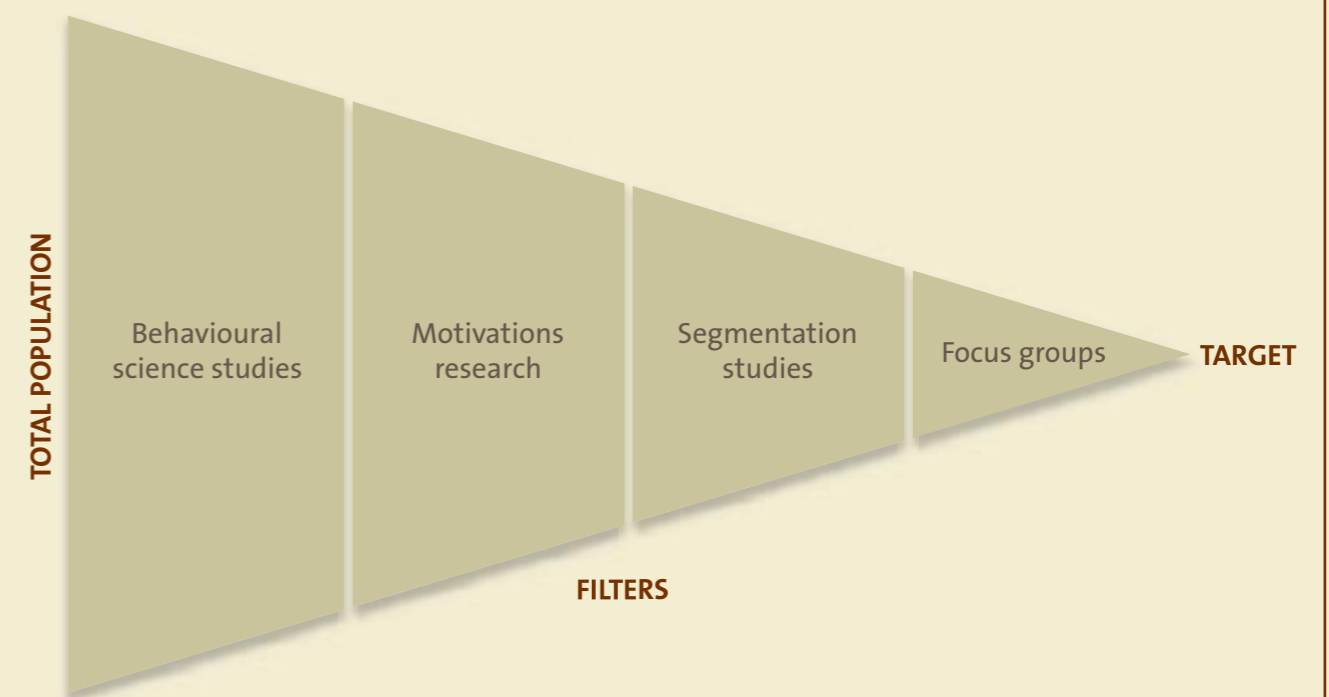
Advertising campaigns typically target either a mass audience or a particular subset of the population. Factors such as budgets, destination relevancy, consumer motivations, and air access have caused most National Tourism Organisations (NTOs), including Tourism Australia, to adopt a segmented approach. This approach remains the essence of Tourism Australia's marketing strategy.

As destination marketing has become more sophisticated (driven by factors such as the quality and quantity of competitors, superb product development and a more discerning visitor) so too have the methods of determining the most appropriate visitors or target audience for a particular destination.

Tourism Australia has undertaken extensive research to identify the ideal visitor segment for Australia which will best help meet key business objectives. This research has challenged the previously held notions that the travelling population was segmented primarily by country of origin and thereafter by mode of travel (long haul, inter-regional, domestic), style of travel (free independent, package, backpacker) and distribution channel. In fact, the key defining characteristics which group people into segments are psychographic and include factors such as personal motivations and lifestyle drivers.

At this psychographic level, common segments exist that cross national borders. The motivations and attitudes in relation to travel are more similar across nationalities than their respective cultural differences. These characteristics are then translatable into experience preferences. Therefore, it has proven possible to isolate global segments most receptive to the Australian experience.

## PROCESS OF CREATING A TARGET AUDIENCE



The aim of this booklet is to provide insight into Australia's ideal visitor segment, the Experience Seeker. The global campaign is targeted at these people, and it is also these visitors who can influence others to consider Australia as their ideal destination.

# Who are Experience Seekers?

## WHO ARE THEY?

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These people:

- > are experienced international travellers.
- > seek out and enjoy authentic personal experiences they can talk about.
- > involve themselves in holiday activities, are sociable and enjoy engaging with the locals.
- > are active in their pursuits and come away having learnt something.
- > are somewhat adventurous and enjoy a variety of experiences on any single trip.
- > place high importance on value and hence critically balance benefits with costs.
- > place high value on contrasting experiences (i.e. different from their day-to-day lives).

## WHAT DO WE KNOW ABOUT THEM?

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These people typically:

- > come from households that have higher than average household income.
- > are tertiary educated.
- > are open-minded and have an interest in world affairs.
- > are selective about their media consumption.
- > are opinion leaders within their peer and social groups.
- > are not characterised by nationality, preferred holiday style/mode or age.

## HOW LARGE IS THE SEGMENT?

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This segment constitutes around 30 to 50 per cent of all potential long haul outbound travellers from key source markets.

## HOW DO WE COMMUNICATE WITH THEM?

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These people are avid users of technology and in both private and business capacities. They are selective TV viewers, but are higher than average consumers of cable channels, and are predisposed to programmes that meet their lifestyle and motivation profiles. Intellectual programmes and those with knowledge content are preferred. The segment is well versed in global brand communication, and as such would expect brand communication and content to be available in many forms on a variety of channels including digital. This audience is also well-connected and likes to learn from and share information with their peers.



*“ Show me what to do. Show me the people, the look on their face – something where we go ‘I want to have that experience’ ”*

US, male

# Process of determining the ideal visitor

In determining the characteristics and profile of Australia's ideal visitor, four discrete concepts were analysed:



## MARKET SEGMENTATION

A series of segmentation studies were conducted in Australia's major markets in 2004/05. Whilst the original intent was to isolate segments within countries, it became evident after re-examination that segments within countries were strikingly similar to those in other countries. The motivation and attitude towards travel amongst these groups was common. This phenomenon is already well known to global media organisations, and as such provided key ingredients to the definition of the ideal visitors.

## AUSTRALIA'S REQUIREMENTS

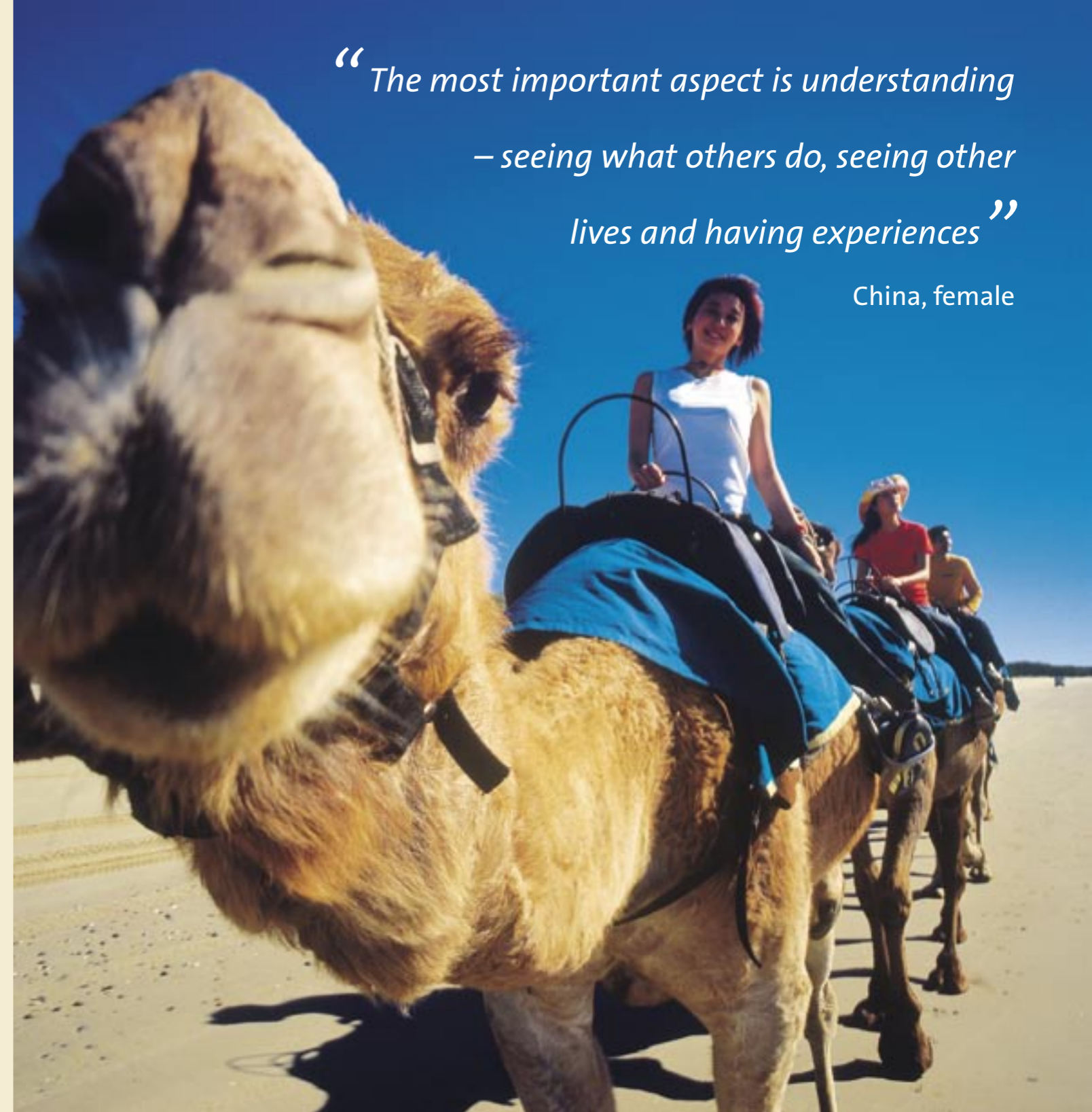
Australia is not for everyone. In fact most people who travel internationally will never visit the country, especially given the barriers of time and distance. A target market less susceptible to our weaknesses and highly predisposed to Australia's offer will ensure people stay longer, spend more, and disperse to regional areas. This target market will provide the best chance of meeting the business goals of Tourism Australia.

## CURRENT CONSUMPTION PATTERNS

People who currently visit are a good indicator of the type of experiences that appeal to visitors. Departing visitor surveys show that the main experiences engaged in whilst on holiday in Australia are not driven by nationality. Australia hosts people who enjoy variety and who consume what Australia has to offer in similar quantities and in much the same areas. So the profile of current visitors and how they are voting with their feet and wallets provides a clear insight as to those who are most likely to enjoy the Australian experience.

“The most important aspect is understanding  
– seeing what others do, seeing other  
lives and having experiences”

China, female



## GLOBAL TRENDS

Studies of world lifestyle trends provide insight into broader consumer motivations and the destination attributes which match those motivations. There is a significant trend for people to want to understand the lifestyle of others and how it has been influenced by environmental factors. Similarly there is a world trend to seek to grow as an individual, to being healthier, to experience freedom and reconnect with family. Australia is a destination that can competitively meet these motivations.

Combining the information from these four areas enabled the characteristics of a single target market to be defined. Once this target market was defined, research subsequently helped determine the consumer insight and the current positioning of Australia, two elements critical to the development of the new campaign.



“ We don’t want to feel like a tourist.  
We want to settle in ... ”

Germany, female

# The Experience Seeker

The ideal target market are people who have a greater propensity to enjoy what Australia offers and also meet the objectives of the country. These individuals have higher product consumption and are likely to spend more. They are Experience Seekers.

They have the following characteristics:

- > They are experienced travellers who see travel and holidaying as an important aspect of their lifestyle. Before travelling to Australia they would have taken previous international holidays. This experience brings with it an expectation of value and access to information.
- > Being experienced, they investigate holiday options thoroughly and as such are knowledgeable consumers. The vocabulary they use about destinations reflects the search for active engagement and participation. This desire holds true for their choice of holiday destination as much as for their holiday activities.
- > Compared to the average consumer, these individuals spend more and like to engage with the local people and lifestyle. They want to absorb and get involved in the day-to-day culture. Consequently, their holiday experiences are more engaging.
- > These people, irrespective of age or nationality, are substantial consumers of non-traditional and mainstream media. They are attracted to current affairs, topical and special interest programmes. They are higher than average consumers of cable television, cinema, international news and current affairs and the internet.

- > They value the opinions of other travellers and seek their views on destinations so an engaging conversation “traveller-to-traveller” is an appropriate messaging style.
- > As high users of technology they are comfortable accessing information and being exposed to messages in digital environments.
- > Regardless of age, Experience Seekers are more predisposed toward activities and pursuits that enhance them as individuals whether it is through understanding or learning new things.
- > Being tertiary educated and inquisitive, these individuals understand how brands work and operate. As such they understand and would expect brand messages to be succinct, focused on their motivations, and provide a credible compelling message. In such environments the development of strong brand associations is essential.
- > Being educated and experienced they do not enjoy being sold to or being treated as marketing illiterate. These people are mature in communication terms and take the initiative on their planning and purchasing decisions.

## EXPERIENCE SEEKERS: THEIR IMPORTANCE TO THE CAMPAIGN

By definition, not everyone in the marketplace is an ‘Experience Seeker’. However, it is this group that can best deliver against our objectives and who are also best placed to influence other consumers, especially when marketing funds are insufficient to adopt a mass-market approach.

Experience Seekers are not only valuable in their own right, but they have significant added marketing value. The marketing concept of innovators and early adopters is well established. Over time, early adopters are central to success, not only because of their ‘earlier’ take-up of product and services but also because of the influence they have on the purchase behaviour of others. This process has led to the understanding of the ‘tipping point’ as marketing phenomena; i.e. the point in the evolution of a market when early adopters influence enough other consumers to ensure self-sustaining demand.

Certain destinations such as France, Italy, and the USA, have achieved this point, whilst some such as Vietnam and Morocco are developing on the back of early adopters and now becoming more mainstream. Equally it is the early adopters who re-invent a destination – to make it fashionable once again or bring about a re-appraisal by a wider audience. This point is particularly relevant for Australia.

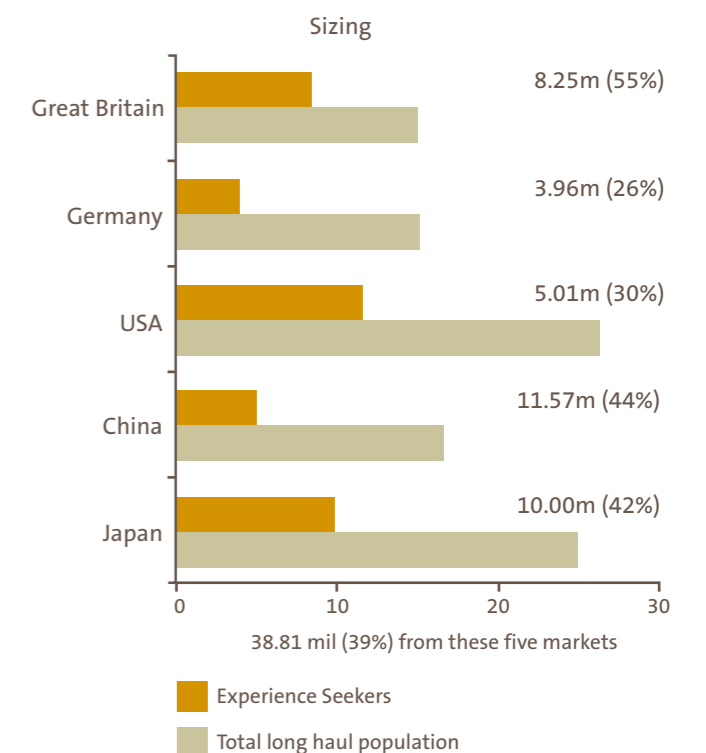
Given that Experience Seekers are leaders within their peer groups, and are the early adopters, their exposure to the campaign’s aspirational messages provide a marketing platform which potentially makes the tipping point a realisable objective. This will ensure that demand growth objectives are realised earlier and more cost-effectively. In short, by speaking to our ‘Experience Seekers’ we are indirectly speaking to and influencing a much broader pool of consumers. This is the essence of leverage.

It also needs to be noted that whilst the campaign is targeted to what is currently a relatively smaller proportion of our visitors, this does not mean that the communications will be rejected by other groups. A key factor in any segmentation of the market is that whilst there are differences, there are also similarities. Hence the communications are relevant to a far broader audience. The idea of having a more discrete target is nominating the focus for the communications, so as not to dilute the efficiency or effectiveness of the media spend.

## TARGET MARKET SIZE

The characteristics outlined previously were overlaid on entire populations and in particular the travelling public. The results are presented in the graph below. The data shows that the Experience Seeker segment comprises at least 26 per cent of all potential long haul outbound travellers, with the average around 40 per cent.

Whilst Experience Seekers constitute between 26-50 per cent of total potential outbound travellers from key markets, it is estimated the same group only constitutes between five to 15 per cent of total inbound to Australia. Given the high satisfaction levels these visitors report after visiting Australia, the results suggest that not only is there healthy growth potential but also that this potential is very profitable.



# The campaign: how targeting will work

The “Australian Invitation” campaign is designed to attract Experience Seekers, thereby increasing the demand pool for the destination. Once achieved, it is important that the product best representing their needs is presented and delivered.

To target these consumers, the campaign media schedule and the messaging strategy have specific dimensions, namely:

- > The Australian invitation is presented in appropriate mediums, as reflected in the media consumption mix of Experience Seekers within each market.
- > The core media is supplemented with a strong knowledge, experience-based programming schedule on Discovery channel and National Geographic channels. These provide the ideal brand associations and necessary vehicles for detailed destination information.
- > Interactivity and information is provided with an array of digital programmes and web activity.
- > Vibrancy is provided via PR event activity which will focus on key Australian experiences.
- > Immediacy is generated through direct programmes and contact points.

Individual country media schedules will be available from local Tourism Australia offices.

## Campaign summary

|                         |   |
|-------------------------|---|
| <b>OUR OBJECTIVE</b>    | Increase Experience Seekers’ intention to travel to Australia |
| <b>BY</b>               | Engaging them in a conversation                               |
| <b>IGNITED WITH</b>     | A uniquely Australian invitation                              |
| <b>SUPPORTED BY</b>     | Compelling information about Australian experiences           |
| <b>PROVIDED THROUGH</b> | A multiplicity of communication touch points                  |
| <b>TO GENERATE</b>      | Contact with the distribution channel                         |



“It’s not just about collecting photos”

Japan, male

## Further information

For more information on the Experience Seeker target audience, please contact your local Tourism Australia office.

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