

Understanding Experience Seekers in the German Market

Tourism Australia's global market segment 'Experience Seekers' was targeted because they:

- Are likely to undertake long haul travel
- Are high yield prospective travellers
- Are likely to disperse beyond the major capital cities and gateways and are,
- Non-rejectors of Australia

Experience Seekers can be found in different age groups, income levels, and regions. They have a mind set and attitude to life that stretches well beyond the category of travel including personal development and everyday life. Experience Seekers also have global commonalities; they:

- Are experienced travellers for whom travel plays a big part in life
- Look to challenge themselves, be it physically, emotionally or mentally
- Desire a high level of engagement with the local people and culture
- Wish to experience, not witness destinations
- Like to avoid the tourist route, preferring locations that are untouched

German Experience Seekers

In broad terms, they:

- Are inspired by a range of sources. They are more likely than other long haul travellers to be inspired by travel books, documentaries newspaper articles and internet sites. Notably, word of mouth recommendations including knowing people who have visited or live at the destination are very powerful among Experience Seekers, however not to the same extent as other long haul travellers. Moreover they are less susceptible to advertising;
- Are more likely to plan their holiday around food & wine, cultural events, hiking, shopping, photography, nature and museums. Further to this, once at the destination they are more likely to eat at restaurants, get to know the locals, learn about the native (indigenous) culture, explore the backstreets and self drive throughout the region;
- Are more likely to stay in rented accommodation (such as villas, apartments, cottages, etc.) or guest houses. They are less likely to stay in hotels;
- Are not overly interested in newspapers, with no specific publications standing out (regional publications were found to be more popular among this segment than national publications). When reading newspapers, they are more likely to always read the international news, medical/health content, science & technology, nature, product reviews, arts/books/music/theatre and business information. Personally relevant information including cooking, education, DIY and investing are also more likely to be popular among this segment. Moreover, they are less likely to read real life stories and celebrity news or gossip;
- Are avid magazine readers (75% read more than 3 publications a month). Genres that are more popular among this market include holiday & travel, global news, medical/health & fitness, arts/books/music/theatre, nature, technology, home & garden, personal finance and property. Titles that specifically reach Experience Seekers include *Medizin Heute* and *Geo*. Other popular titles include *ADAC Motorwelt*, *Bunte*, *Das Haus* and *Freizeit Revue*;
- Generally listen to the radio, however not to the same extent as the remainder of the adult market. Live bands in studios, education, business and concert programmes were found to be the most popular among Experience Seekers;
- Are selective TV viewers who are more likely to watch ARD Erstes Deutsches Fernsehen and ZDF. They are more interested in

factual programs based around news and current affairs. Some of the programmes that Experience Seekers are more likely to watch include Tagesschau, Tagesthemen, Heute and Heute Journal;

- Are more likely to rate action, adventure or fantasy films as their favourite film genres;
- Are more likely to be exposed to outdoor media than long haul travellers or the general population. Experience Seekers are more likely to recall seeing advertising

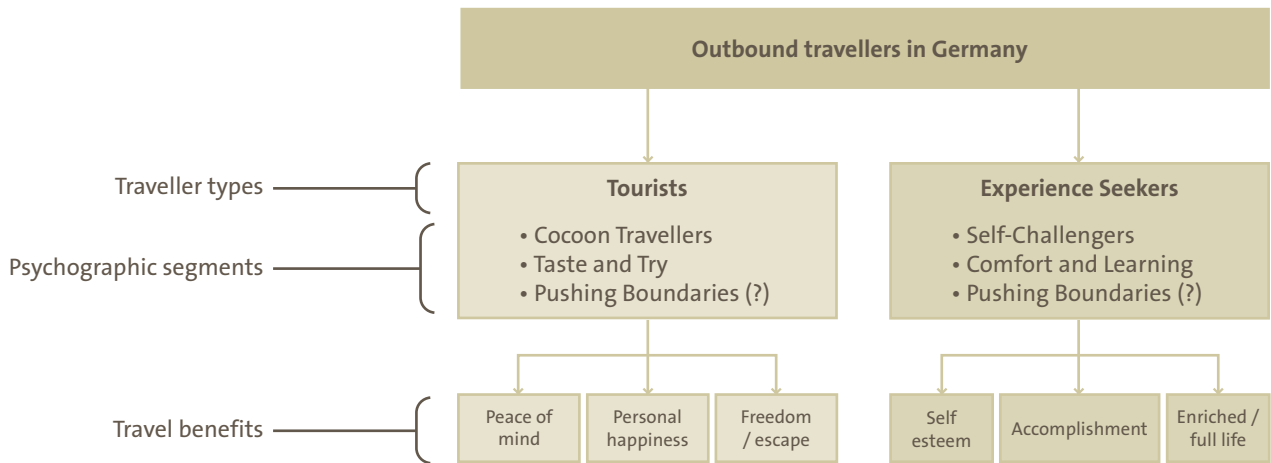
on the underground, within or on taxis, at railway stations, at the airport or on free postcards at bars/cafes/health clubs;

- Are more likely to use the internet than the average adult in Germany (although it must be noted that the internet does not appear to be well established in Germany in comparison to many other markets). They are more likely to look online for information regarding travel, business, news, investments and property. Experience Seekers are

more likely to make purchases online (specifically for holidays, events, books and clothing) and use online banking services;

- Are more likely to own at least one credit card, and specifically, more likely to own a Visa card;

The following diagram illustrates the two primary outbound traveller types in Germany, core psychographic segments and key travel benefits sought.



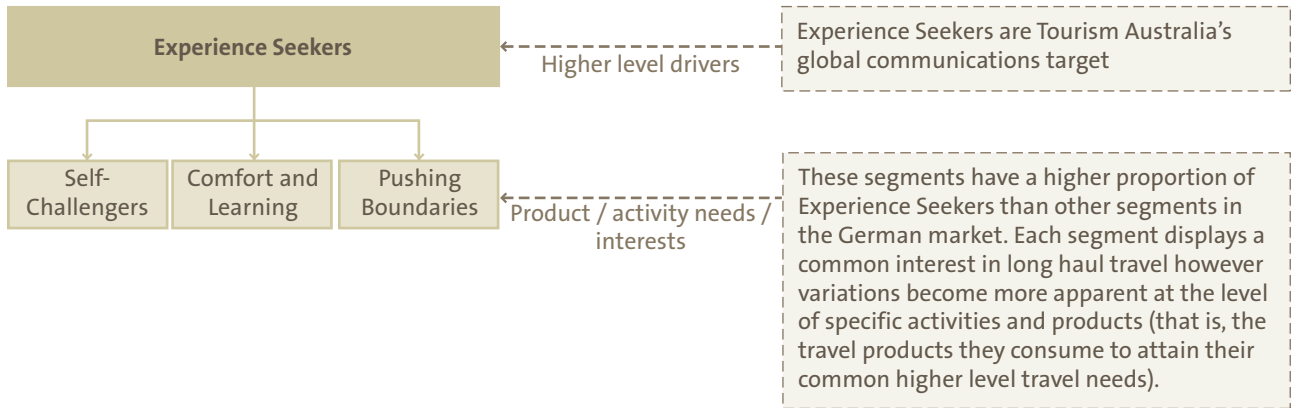
So, how does the Experience Seeker target relate to the five current psychographic holiday segments in the German market (Self-Challengers, Comfort and Learning, Pushing Boundaries, Cocoon Travellers and Taste & Try)?

Experience Seekers are our global communications target. They share common interests, drivers, and desires in life and travel. The types of media they listen to and the experiences they are looking for from a long haul holiday are also common to Experience Seekers in all markets.

Experience Seekers are an overarching segment whose values, needs and motivations have relevance and

therefore resonate with more than one travel style, holiday type, etc. It is however recognised that Experience Seekers values, needs and motivations are more common in some particular psychographic holiday segments.

In the case of Germany these holiday segments are Self-Challengers, Comfort and Learning and Pushing Boundaries.



What does this mean?

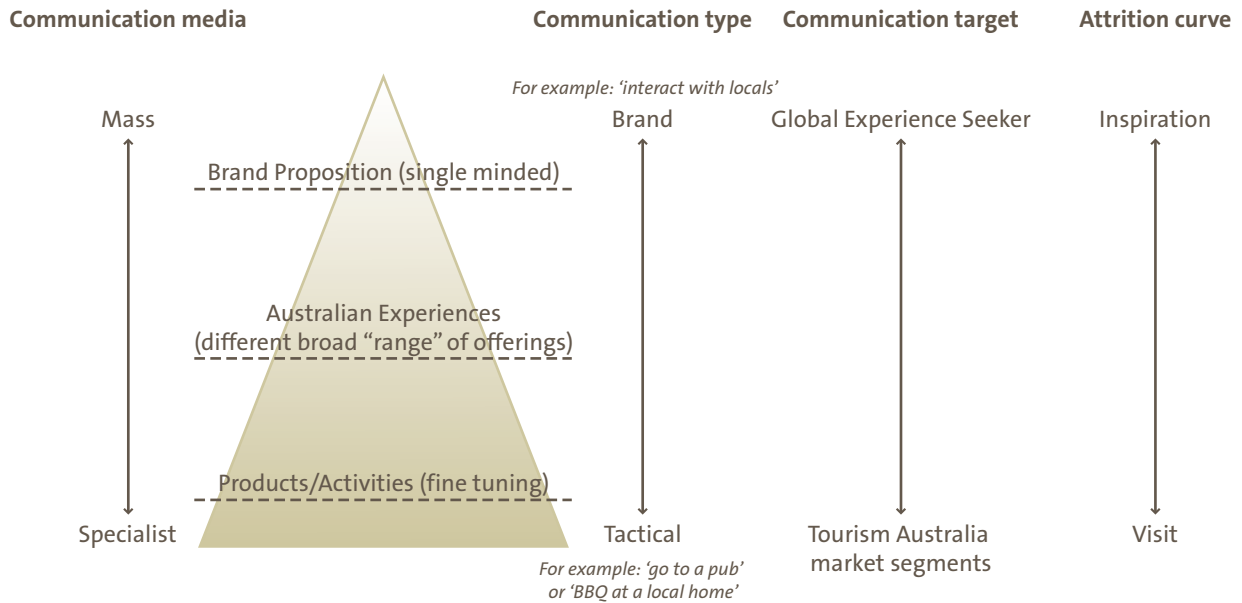
The result of this is that at an over-arching brand communications level, the Experience Seeker is the global target market. However, when communicating information regarding specific products and activities, the opportunity exists to fine tune amongst appropriate holiday segments within the German market.

While Experience Seekers have similar broad drivers for their holidays, the manner in which these can be realised through consuming products or activities can vary among the different holiday segments within each market. Here is an example of what we mean:

A German traveller who prefers a Comfort & Learning style holiday and a traveller who prefers a Self-Challenger type

of holiday would both be motivated by Experience Seeker messages about learning, local lifestyle, interacting with locals, etc. The type of products and activities they would seek out (information search) and eventually participate in (what they do at the destination) can, and does vary. For example, interacting with locals – Comfort & Learning travellers could obtain this by dining in a pub frequented by visitors and locals. Self-Challengers may obtain this through meeting a local and being invited to their house for a BBQ.

The role of Experience Seekers and the holiday segments in the communications process can be shown diagrammatically as follows:



Further information

This document is one component of a suite of documents Tourism Australia has produced for the German target market.

For a broad snapshot of the German travel market, please refer to:

- ***Australia's understanding of the German travel market***

For more information on the German segmentation study, please refer to:

- ***The German traveller – segmentation of the German market***

To understand the global communications target market that Tourism Australia is concentrating on, please refer to:

- ***Australia's global communications target: the Experience Seeker***

These documents are available on the Tourism Australia website. For any further information you require, please visit the Tourism Australia website at www.tourism.australia.com, or contact your local Tourism Australia office.