



The German Traveller

Segmentation of the German market



Tourism Australia

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Background

Tourism Australia recognised the need for a ground up review of our understanding of the German traveller in 2005. The main feature of this review was a major segmentation study of the outbound traveller market.

One of our key findings was rigidly defined socio-demographic segmentation is much less relevant in Germany than it used to be. Much like all other inbound markets, segmentation based on attitudes to life in general and tourism specifically, is considered more informative and therefore valuable for marketing purposes.

This fact sheet provides an in-depth profile of the different attitudinal segments we found and is one of a series of documents created to increase your understanding of long haul travellers in Germany (for more information on the document suite, see the end of this document).

This fact sheet gives a detailed overview of the segments in this market and practical information profiling each group including:

- **Demographic profiling of each segment**
- **Approach to long haul travel**
- **Perception of Australia**
- **What inspires them**
- **How to reach them in the media**

- **Timeline for planning their holidays and the sources they use when planning**
- **Travel profile**
- **Holiday activities of interest**
- **Long haul destinations that come into consideration**

Not all the segments identified will be actively targeted by Tourism Australia's global marketing activities. Tourism Australia's global brand campaign is targeting a global communication segment called the Experience Seeker. Communications designed to appeal to the Experience Seeker will also motivate many of the segments identified in Germany (for more information refer to the Experience Seeker fact sheets).

The information contained in this fact sheet provides important insight into the product/activity needs of specific segments including:

- **Creating a strong and effective offer**
- **Crafting marketing messages for greatest effect**
- **Identifying segment specific marketing opportunities**
- **Optimising the effectiveness of communications plans**
- **Getting inspiration for new product ideas**



Segmentation helps us to:

1. Maximise the return on investment of our marketing activity

Segmentation helps us to identify segments in the German 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 composition of the market better

By segmenting the market we can understand the composition, or groups that exist in the German travel market better. We begin to appreciate 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 products.

3. Communicate more effectively to our target segments

Psychographically based segmentation is based upon 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 German 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 this case, the segments were determined using two criteria; the horizontal axis indicating the level of experience in long haul travel and the vertical axis indicating the respondent's preference towards challenging themselves when travelling. These two criteria were chosen as they were seen as core attributes of those likely to visit Australia.

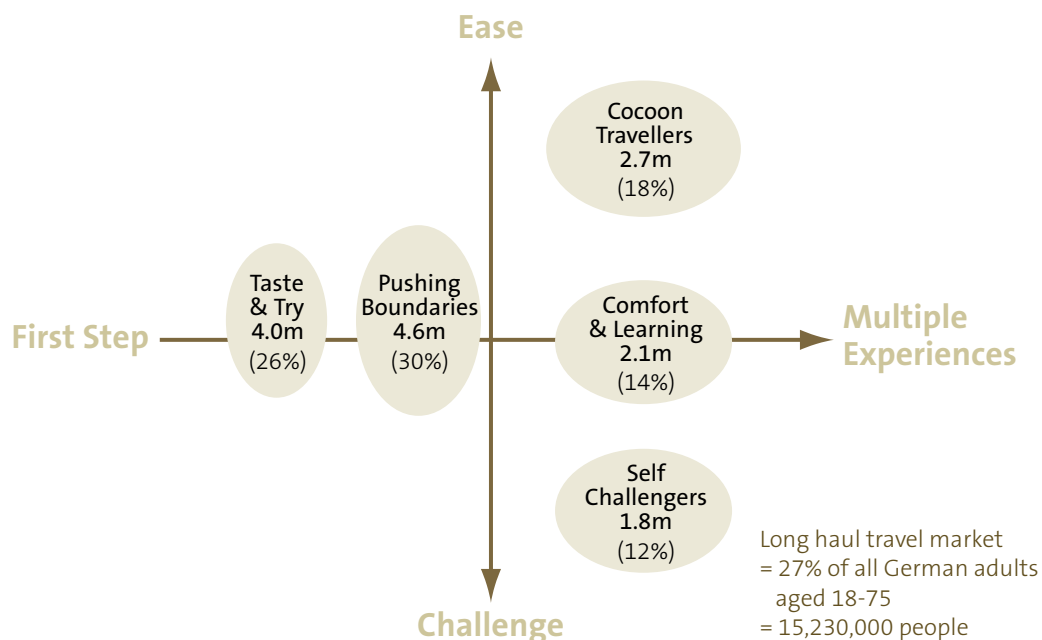
Given the various factors that come into consideration when choosing a travel destination, the position of each segment was determined using a combination of emotional, attitudinal and behavioural elements.

In segmenting the German 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 German long haul travel market:

- **Self-Challengers**
- **Cocoon Travellers**
- **Comfort and Learning**
- **Taste and Try**
- **Pushing Boundaries**

These 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 Germany 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 more than a quarter of the population of Germany 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 Germany.

Self-Challengers

“Travel involves respect for the contrast with other religions and cultures.” Female, 49, Berlin

“I want to see how far I can take myself. I actively look for uncertainty.” Male, 54, Berlin

Segment highlights

Segment size	1.8 million long haul travellers / 12% of the long haul market
Heart of the segment	Travel fulfils an inner drive to challenge themselves and the reward is intensely personal
Profile	Compared to other long haul travellers in Germany, Self-Challengers: <ul style="list-style-type: none">• Are more affluent and highly educated• Are more likely to be single• Are more likely to work at executive or management level• Have a wide range of interests including reading, photography, music concerts, winter sports, water sports, yoga, visiting museums, eating out and more• Are the most likely to own a mobile phone (88%)• Are more likely to own a MasterCard or American Express credit card• Are more likely to be a member of an airline loyalty scheme,• Range between 18 – 75 years of age
Approach to long haul travel	<p>Travel is a big part of the life of a Self-Challenger. They like to immerse themselves in local cultures and focus on self discovery in their travels.</p> <p>They like to visit countries before being discovered by too many tourists and try to blend in with the locals and experience the lifestyle and culture.</p> <p>Learning some of the language provides a challenge. They have a predisposition to adventurous locations – places that feel foreign to them and challenge their understanding and day-to-day experiences.</p>
Australia as a destination	<p>Self-Challengers are very attracted to Australia as a long haul destination. They do not perceive the expense of travelling or difficulty in organising their trip as barriers to the same extent as other target segments. They are drawn to the natural phenomena and indigenous culture that Australia has to offer.</p> <p>Self-Challengers are highly knowledgeable of Australia as a holiday destination, with many feeling frustrated at not being able to visit Australia for longer periods of time.</p>
What inspires them?	When deciding where to go on their next holiday, Self-Challengers are more likely to be inspired by friends and relatives who live overseas, travel books and guides as well as TV documentaries and radio programmes.
How do I reach them in the Media?	<p>The best media sources in which to reach Self-Challengers include:</p> <ul style="list-style-type: none">• They are the most likely to read magazines, particularly Der Spiegel and Focus. In contrast to this, they are less likely than other segments to read Bild Am Sonntag• They always read the science and travel sections of the newspaper, however they spend the least amount of time per day reading newspapers in comparison to other segments. They are the least likely to read Bild and more likely to read Die Zeit• They are the highest users of the internet and the most likely to source travel information online. They also use the internet for buying products and services, job opportunities and for educational activities. In contrast to this they are the least likely to browse the internet for fun

“I want to discover and understand things.” Female, 44, Berlin

“I want to see how far I can go, how far I can take myself. Distance is part of the adventure.” Male, 26, Berlin

How do I reach them in the Media? <i>(continued)</i>	<ul style="list-style-type: none"> • They spend the least amount of time watching TV compared to other segments (they are the most likely to not have television reception at all). However, they are the largest viewers of Arte, 3Sat and Phoenix • They are the most frequent cinema goers
Planning timeline	<p>On average, Self-Challengers have a short planning cycle compared with other long haul travellers in Germany. This is also true of their accommodation booking timelines.</p> <ul style="list-style-type: none"> • Start planning: 22 weeks prior to departure • Book flights: 14 weeks prior to departure • Book accommodation: 12 weeks prior to departure
Planning sources	<p>Self-Challengers are less likely to make travel arrangements through travel agents or tour operators and are the most likely to book flights directly with airlines and flights or accommodation through the internet.</p> <p>Throughout all stages of the planning process, Self-Challengers utilise travel guides and the internet as well as recommendations from friends and family.</p> <p>Self-Challengers are also more likely to consult the destination tourism authorities for general information and information regarding accommodation.</p>
Travel Profile	<p>On a long haul trip, Self-Challengers:</p> <ul style="list-style-type: none"> • Are more likely to travel with friends or alone and less likely to travel as part of an organised tour • Have the highest average length of stay (33 days) and are the most likely to travel for 6 weeks or more • Are less likely to travel for 2 to 3 weeks • Are likely to stay with friends or in budget accommodation (including budget hotel/motels, youth hostels, B&B's and camping) • Have the lowest average spend per day; €78 • Are more likely than other segments to arrange accommodation once having arrived at the destination
Holiday activities	<p>Self-Challengers have a wide range of holiday activities. They are more likely than other segments to plan their holiday around:</p> <ul style="list-style-type: none"> • Cultural events • Bird and animal watching • Photography <p>Once at the destination, Self-Challengers are more likely to:</p> <ul style="list-style-type: none"> • Get to know locals • Explore the backstreets • Self drive around and beyond the city centre • Explore the natural surroundings and local wildlife • Explore the countryside <p>Self-Challengers also like to try local cuisine, purchase locally produced products and experience cultural and indigenous activities</p>
Long haul destinations (other than Australia) they would really like to visit / seriously consider going to	<p>Other long haul destinations of interest include:</p> <ul style="list-style-type: none"> • New Zealand • Pacific Islands • Namibia • Philippines • Thailand • Argentina • Nepal • USA • Japan • Vietnam • Canada • Chile • Gambia • Carribean • South Africa • India

Cocoon Travellers

“My ideal is a quiet beach, lots of going out, a nice hotel not off the beaten track.” Male, 26, Frankfurt

“It’s nice to be waited on.” Male, 26, Frankfurt

Segment highlights

Segment size	2.7 million long haul travellers / 18% of the long haul market
Heart of the segment	Superior holiday experiences are satisfying but they also affirm status
Profile	Compared to other long haul travellers in Germany, Cocoon Travellers: <ul style="list-style-type: none">• Have the highest household income• Are likely to be University educated• Are more likely to own their own house or apartment• Are more likely to enjoy reading newspapers, eating out and shopping• Are less likely to be interested in watching TV, entertaining at home and visiting museums• Are more likely to own a MasterCard or American Express credit card• Are more likely to be a member of an airline loyalty scheme, specifically Star Alliance or Lufthansa• Are more likely to be aged between 55 and 64
Approach to long haul travel	<p>Cocoon Travellers seek luxury and comfort when they travel. They are less interested in immersing themselves in local cultures and rate a high level of service and the opportunity to relax and ‘get away from it all’ as the core elements of an enjoyable holiday.</p> <p>Not generally restricted financially, they are not averse to visiting the same place twice or overly interested in having a unique experience. The ability to visit or spend time with friends and/or relatives plays an important role in their choice of destination.</p>
Australia as a destination	<p>Cocoon Travellers are drawn to Australia, hoping to enjoy the holiday of a lifetime.</p> <p>They appreciate the big cities and fabulous beaches as key drawcards and perceive it to be a safe place to travel. However, these are universally acknowledged attributes of Australia in the German market, with no driver specifically rated higher among Cocoon Travellers.</p>
What inspires them?	<p>Cocoon Travellers are strongly influenced by the opinions of friends and relatives when deciding where to go on their next holiday.</p> <p>Other sources of inspiration include posters, destination tourism authorities and internet discussion boards</p>
How do I reach them in the Media?	<p>The best media sources in which to reach Cocoon Travellers include:</p> <ul style="list-style-type: none">• In terms of newspaper publications, Cocoon Travellers are more likely to read the Frankfurter Allgemeine Zeitung, Süddeutsche Zeitung and Rheinische Post. They are also more likely to always read the financial section of the newspaper• Bunte, Der Spiegel, Elle and Health & Fitness magazines are more popular among this segment than other long haul travellers from Germany• They are more likely to listen to HR (1-4) than other long haul travellers• Cocoon Travellers are more likely to use the internet at work• They do not watch much television and go to the cinema approximately once every three months.

“I only associate Australia with sporty people, backpackers, and nature-boys. I am interested in how the beaches are and the hotels and where are the towns and so on.” Female, 31, Frankfurt

Planning timeline	<p>Cocoon Travellers planning behaviour reflects the same patterns as for the vast majority of long haul travellers in the German market.</p> <ul style="list-style-type: none"> • Start planning: 21 weeks prior to departure • Book flights: 15 weeks prior to departure • Book accommodation: 12 weeks prior to departure
Planning sources	<p>Cocoon Travellers main source of planning information is friends or relatives who live at the destination. Cocoon Travellers are also more likely to arrange package holidays than other segments. In line with this, they are less likely to book flights online.</p> <p>Like all long haul travellers, the majority of Cocoon Travellers read the travel sections of newspapers, however they are more likely to use this as a planning source for arranging accommodation.</p>
Travel Profile	<p>On a long haul trip, Cocoon Travellers are likely to:</p> <ul style="list-style-type: none"> • Travel with their spouse or partner • Stay at all-inclusive resorts or luxury hotels • Have the second highest average spend per day - €110 • Have the highest average total spend among all long haul travellers in Germany - €2,863
Holiday activities	<p>Cocoon Travellers are more likely than other segments of the German market to plan their holidays around:</p> <ul style="list-style-type: none"> • Cultural events • Visiting gardens / seeing native flowers • Health and fitness activities <p>Once at the destination, Cocoon Travellers are more likely to spend time with their family than other segments of the German market.</p>
Long haul destinations (other than Australia) they would really like to visit / seriously consider going to	<p>Other long haul destinations of interest include:</p> <ul style="list-style-type: none"> • USA • Canada • Brazil • Seychelles / Mauritius • Caribbean • Mexico • Argentina • India • Maldives

Comfort & Learning

“It’s a balance between curiosity and need for safety. Risk has to be calculated. I have to know where I am going to stay at night.” Female, 26, Berlin

“I try to get as much out of it as possible. Thus I have to compromise and have quite a lot organised and booked before.” Female, 26, Berlin

Segment highlights

Segment size	2.1 million long haul travellers / 14% of the long haul market
Heart of the segment	Keep learning, security, comfort and enjoyment in balance
Profile	<p>Compared to the rest of the long haul travel market in Germany, Comfort & Learning travellers:</p> <ul style="list-style-type: none">• Are more likely to be older and live alone• Are the most likely to own their own house or apartment• Are less educated than other segments, being more likely to have secondary school as their highest level of education• Are more likely to work in unskilled or semi-skilled positions• Do not have a wide range of strongly defined interests, however they are more likely to enjoy club activities, handicrafts and DIY
Approach to long haul travel	<p>In their minds, Comfort & Learning travellers want to avoid the more touristy areas on holiday but in reality they are often drawn to icons and famous sights.</p> <p>While enjoying the luxuries of travel, Comfort & Learning travellers are very interested in educating themselves in all aspects of the destination. They feel the need to challenge and exhaust themselves when travelling to convince themselves they have immersed themselves in the culture. However, it is their lack of confidence as travellers that drives their desire to travel with guides or in groups.</p> <p>They are not risk averse or interested in spending time with friends or family when travelling - they are only restricted by what they can afford and limited annual leave entitlements.</p>
Australia as a destination	<p>The ability to visit friends and the natural beauty of Australia are seen as the main drivers for Comfort & Learning travellers interested in visiting Australia.</p> <p>Although they are less likely to be affected by the generally accepted barriers among the German market, Australia is not viewed as unique, being rated as similar to Europe and does not present them with the educational elements they desire.</p>
What inspires them?	<p>Comfort & Learning travellers are influenced by:</p> <ul style="list-style-type: none">• Friends who have been to the destination• Travel agents• Print media articles• TV travel programs• Travel books <p>Comfort & Learning travellers are also influenced more by the locations celebrities have visited than other segments within the long haul travel market.</p>

“I want old cultures, there is so much to discover, many interesting things. Relaxation has to be combined with this broadening of the horizon.” Male, 54, Berlin

“Culture? Of course there are the aborigines, but what else?” Male, 51, Berlin

How do I reach them in the Media?	<p>The best media sources in which to reach Comfort & Learning travellers include:</p> <ul style="list-style-type: none"> • They are more likely to read Das Bild • They are more likely to read the travel and lifestyle sections of newspapers • They are the most likely to watch travel and lifestyle programmes as well as Eurosport, Premiere and Neun Live TV networks • They are more likely to listen to Hit Radio (FFH/RNR Eins), MDR 1, Radio PSR and Antenne MV • They spend the least amount of time on the internet and are the least frequent cinema goers 												
Planning timeline	<p>Comfort & Learning travellers have a lengthy lead time when planning long haul travel, with longer lead times on average than other segments. This is related to their interest in guided travel and lack of confidence as travellers.</p> <ul style="list-style-type: none"> • Start planning: 30 weeks prior to departure • Book flights: 19 weeks prior to departure • Book accommodation: 21 weeks prior to departure 												
Planning sources	<p>Comfort & Learning travellers prefer to make all travel arrangements at a central source such as an operator.</p> <p>They are the most likely to make all arrangements prior to leaving their home and arrange all facets of the trip including activities and meals prior to departure. They are less likely to book flights online or directly with the airline or accommodation directly with the hotel.</p>												
Travel Profile	<p>On a long haul trip, Comfort & Learning travellers are more likely to:</p> <ul style="list-style-type: none"> • Travel as part of an organised tour (the most likely to travel in a group of 6 or more) • Stay in luxury hotels • Have the highest average spend per day per person: €123 <p>They are very unlikely to stay with family / friends and are almost certain not to stay in hostels. On average, Comfort & Learning travellers have a lower level of annual leave entitlement.</p>												
Holiday activities	<p>Comfort & Learning travellers plan their holidays around similar activities as other long haul travellers, however bird and/or animal watching is of particular interest to them.</p> <p>Once on holiday, Comfort & Learning travellers are more likely to go on guided tours, however are less likely to purchase local products or visit national parks.</p>												
Long haul destinations (other than Australia) they would really like to visit / seriously consider going to	<p>Other long haul destinations of interest include:</p> <table border="0"> <tr> <td>• Caribbean</td> <td>• USA</td> <td>• Canada</td> <td>• Mexico</td> </tr> <tr> <td>• South Africa</td> <td>• Brazil</td> <td>• China</td> <td>• Malta</td> </tr> <tr> <td>• Malaysia</td> <td>• Nepal</td> <td>• Philippines</td> <td></td> </tr> </table>	• Caribbean	• USA	• Canada	• Mexico	• South Africa	• Brazil	• China	• Malta	• Malaysia	• Nepal	• Philippines	
• Caribbean	• USA	• Canada	• Mexico										
• South Africa	• Brazil	• China	• Malta										
• Malaysia	• Nepal	• Philippines											

Taste & Try

"I haven't seen much of the world yet, I'm starting now and want to appreciate it." Male, 32, Frankfurt

"I would not start with a whole continent. The focus is not on too many new experiences."

Male, 28, Berlin

Segment highlights

Segment size	4.0 million long haul travellers / 26% of the long haul market
Heart of the segment	Setting out to see more of the world with their own eyes
Profile	<p>Compared to other long haul travellers in Germany, Taste & Try travellers:</p> <ul style="list-style-type: none">• Have the highest number of people per household• Are more likely to live with their parents• Are more likely to be employed part time• Are less likely to have completed university• Have a lower household income• Have a narrow range of interests which are more likely to include watching TV, listening to music and going to clubs or discos• Are more likely to be between 18 and 24 years of age• Are less likely to own a credit card or be a member of an airline loyalty scheme
Approach to long haul travel	<p>Taste & Try travellers are defined by their inexperience and as such, are attracted to well known destinations. Their inexperience leads to a reliance on external influences for choosing a destination and their preference for group travel.</p> <p>Their relative inexperience is generally related to the fact that they are yet to catch the travel bug. Their decisions are often based on the need to visit friends or family, or an innate personal desire to experience a different culture to their own.</p>
Australia as a destination	<p>Taste & Try travellers are very unlikely to have ever visited Australia. As with other long haul travellers, Australia is seen as a safe and comfortable destination and a once in a lifetime opportunity.</p> <p>Key barriers to visiting Australia exist among Taste & Try travellers. These barriers relate to a lack of awareness of what Australia has to offer as well as the costs involved with long haul travel.</p>
What inspires them?	<p>The top sources of destination inspiration for the Taste & Try segment include:</p> <ul style="list-style-type: none">• Friends who have been to the destination• Travel agents• TV Travel programs• Tour operator brochures <p>Taste & Try travellers are also more likely than other segments to use internet chat rooms or discussion boards as sources of inspiration</p>

“It is important that it is different. Here I know everything.” Female, 28, Frankfurt

“I would like to plan most things ahead, but I can’t know everything, so I’ll have to be a bit flexible.” Male, 22, Frankfurt

How do I reach them in the Media?

Taste & Try travellers pay most attention to the following media:

- They are more likely to watch entertainment programmes and movies
- They spend the most amount of time listening to the radio
- They have the highest average internet usage – particularly online chat, downloading music and general surfing

Taste & Try travellers are less likely to:

- Read the science and finance sections of the paper
- Read Die Zeit, Der Spiegel and Focus
- Watch lifestyle and culture programs

Planning timeline

Taste & Try travellers start the planning process earlier than most other segments however generally book accommodation and flights at around the same time as other long haul travellers.

- Start planning: 29 weeks prior to departure
- Book flights: 16 weeks prior to departure
- Book accommodation: 16 weeks prior to departure

Planning sources

Taste & Try travellers rely on travel agents throughout all stages of the planning process. While using the internet for inspiration, they are less likely to make arrangements online, particularly when it comes to booking flights.

Holiday activities

When travelling, the Taste & Try segment enjoy:

- Going to restaurants
- Relaxing by the beach or pool
- Shopping for locally produced products
- Visiting local markets
- Going to bars or night clubs

Taste & Try travellers are less likely to want to immerse themselves in the local culture and people and do not tend to explore the destination or visit famous sights to the extent of other long haul travellers.

Long haul destinations (other than Australia) they would really like to visit / seriously consider going to

Other long haul destinations of interest include:

- Caribbean
- Canada
- New Zealand
- USA
- Pacific Islands
- Hong Kong

Pushing Boundaries

"I want to discover something new and to be more independent." Female, 20, Frankfurt

Segment highlights

Segment size	4.6 million long haul travellers / 30% of the long haul market
Heart of the segment	Caught the travel bug and hungry for more
Profile	Compared to other long haul travellers in Germany, Pushing Boundaries: <ul style="list-style-type: none">• Are slightly younger than other travellers• Are more likely to be a self-employed tradesman or craftsman• Are less likely to own their own house or flat• Have a range of interests consistent with those of other long haul travellers• Are less likely to be a member of an airline loyalty scheme
Approach to long haul travel	Pushing Boundaries are very inexperienced travellers who are on the cusp of long haul travel. Their needs match those of other travellers in the long haul market. Their inexperience dictates their limited likelihood of travelling beyond major centres or experiencing indigenous cultures. They are less likely to immerse themselves in the people and lifestyle of a destination.
Australia as a destination	There is a lack of strong drivers and barriers among this segment beyond the rational barriers shared with other long haul travellers, suggesting a lack of knowledge about Australia. This can be attributed to their inexperience when it comes to long haul travel. While generally information regarding Australia is positive, there are no specific elements or opportunities mentioned. There is a sense among this segment that Australia could provide them with the experience of a lifetime.
What inspires them?	Pushing Boundaries travellers are inspired to visit destinations by: <ul style="list-style-type: none">• Friends who have been to the destination• Travel agents and tour operators• Travel articles in newspapers and magazines• Travel and leisure programs They are also more likely than other segments to be influenced by celebrities who have been to the destination.
How do I reach them in the Media?	Pushing Boundaries travellers exhibit similar media habits to those of other long haul travellers in Germany (including internet usage), although they are less likely to cite reading a newspaper as an interest. The most widely read newspaper within this segment is Bild
Planning timeline	Pushing Boundaries travellers planning timeline is similar to that of other long haul travellers: <ul style="list-style-type: none">• Start planning: 25 weeks prior to departure• Book flights: 16 weeks prior to departure• Book accommodation: 14 weeks prior to departure

“Now it’s the calm before the storm. When I retire I want to see the world.” Female, 52, Frankfurt

“It’s also about growing and maturing and collecting experiences. You only get that if you go there.” Male, 27, Berlin

Planning sources	<p>When planning a long haul vacation, Pushing Boundaries make use of travel agents at all stages of the booking process. This segment will also employ online travel agents when arranging their vacation.</p> <p>They are less likely to use the destination tourism authority for inspiration or use specialist magazines to determine flight availability.</p>
Travel Profile	<p>On a long haul trip, Pushing Boundaries travellers are likely to:</p> <ul style="list-style-type: none">• Have the lowest average spend per trip (€2,401)• Have one of the lowest average spends per day (€94) <p>Pushing Boundaries travellers are also less likely than other long haul travellers to travel as part of an organised tour.</p>
Holiday activities	<p>Pushing Boundaries travellers favourite holiday activities are similar to those of other long haul segments and include:</p> <ul style="list-style-type: none">• Eating at restaurants• Shopping for local products• Meeting locals• Relaxing by the beach or pool
Long haul destinations (other than Australia) they would really like to visit / seriously consider going to	<p>Other long haul destinations of interest include:</p> <ul style="list-style-type: none">• Caribbean• Canada• USA• Brazil• Chile• Thailand



Identifying Australia's most valuable target markets

Of the five segments identified in the German travel market, Self-Challengers and Comfort & Learning are the segments specific to the German market that Tourism Australia has identified as core targets.

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, Self-Challengers and Comfort & Learning are desirable target segments because:

- They know something about what Australia has to offer, so the education task is easier;
- 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 Self-Challengers and Comfort & Learning travellers represents the most sustainable strategy for Australia over the medium term.

What about 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 share many of their attitudes to travel with Comfort & Learning and Self-Challengers. In fact, with more travel experience, these travellers are likely to become part of the Comfort & Learning or Self-Challenger segments. For this reason, Tourism Australia'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 Tourism Australia, this lucrative segment offers a potential opportunity for parts of the Australia tourism industry because:

- They have the highest tendency to buy directly 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.

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

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

- Australia's global communications target: the Experience Seeker

For more information on how the Experience Seeker communications target relates to the German segmentation information in this document, please refer to:

- Experience Seekers in Germany – understanding Experience Seekers in the German market

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

Contacts

AUSTRALIA

Sydney
Level 18,
Darling Park Tower 2
201 Sussex Street
Sydney NSW 2000
Australia
Telephone +61 2 9360 1111
Facsimile +61 2 9331 6469

Canberra
Level 3
11-17 Swanson Plaza
Belconnen ACT 2617
Australia
Telephone +61 2 6228 6100
Facsimile +61 2 6228 6180

CHINA
Unit 1501, 15/F
Citigroup Tower
33 Hua Yuan Shi Qiao Road,
Lujiazui
PuDong, Shanghai 200120
China
Telephone +86 21 6887 8129
Facsimile +86 21 6887 8133

GERMANY

Neue Mainzer Strasse 22
D 60311
Frankfurt/Main Germany
Telephone +49 69 274 00622
Facsimile +49 69 2740 0640

HONG KONG
Suite 6706
67th Floor Central Plaza
18 Harbour Road
Wanchai Hong Kong
Telephone +852 2802 7700
Facsimile +852 2802 8211

JAPAN
New Otani Garden Court
Building 28F
4-1 Kioi-cho Chiyoda-ku
Tokyo 102-0094 Japan
Telephone +81 3 5214 0720
Facsimile +81 3 5214 0719

KOREA
20th Floor
Youngpoong Building
33 Seorin-dong
Chongro-ku
Seoul 110-752 Korea
Telephone +82 2 399 6500
Facsimile +82 2 399 6507

MALAYSIA

Suite 12-1
Faber Imperial Court
Jalan Sultan Ismail 50250
Kuala Lumpur Malaysia
Telephone +60 3 2611 1148
Facsimile +60 3 2070 4302

NEW ZEALAND
Level 3
125 The Strand
Parnell
Auckland New Zealand
Telephone +64 9 915 2826
Facsimile +64 9 915 2881

SINGAPORE
101 Thompson Road
United Square #08-03
Singapore 307591
Telephone +65 6255 4555
Facsimile +65 6253 8431

TAIWAN
Suite 1512, Level 15
333 Keelung Road, Section 1
Taipei Taiwan
Telephone +886 2 2757 7188
Facsimile +886 2 2757 6483

THAILAND

Unit 1614
16th Floor
River Wing East
Empire Tower
195 South Sathorn Road
Yaanawa Sathorn
Bangkok Thailand 10120
Telephone +66 2 670 0640
Facsimile +66 2 670 0645

UNITED KINGDOM
Australia Centre
Australia House
6th Floor
Melbourne Place/Strand
London UK WC2B 4LG
Telephone +44 20 7438 4601
Facsimile +44 20 7240 6690

UNITED STATES
6100 Centre Drive
Suite 1150
Los Angeles California
United States 90045
Telephone +1 310 695 3200
Facsimile +1 310 695 3201