



The US Traveller

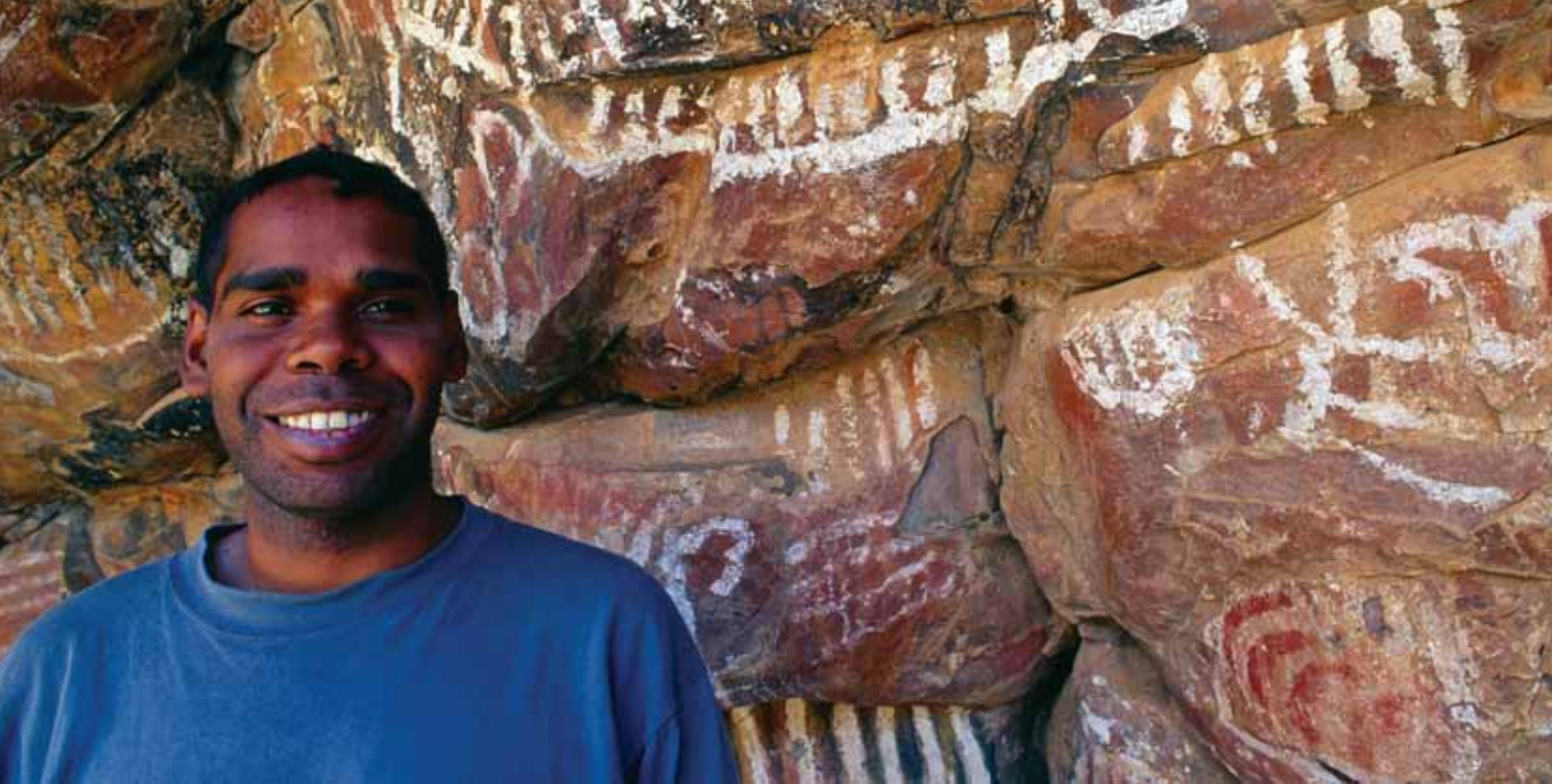
Segmentation of the US Market



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Background

Tourism Australia recognised the need for a ground up review of our understanding of the American 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 the USA 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 the USA (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 the USA (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 US 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 USA 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 US 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.

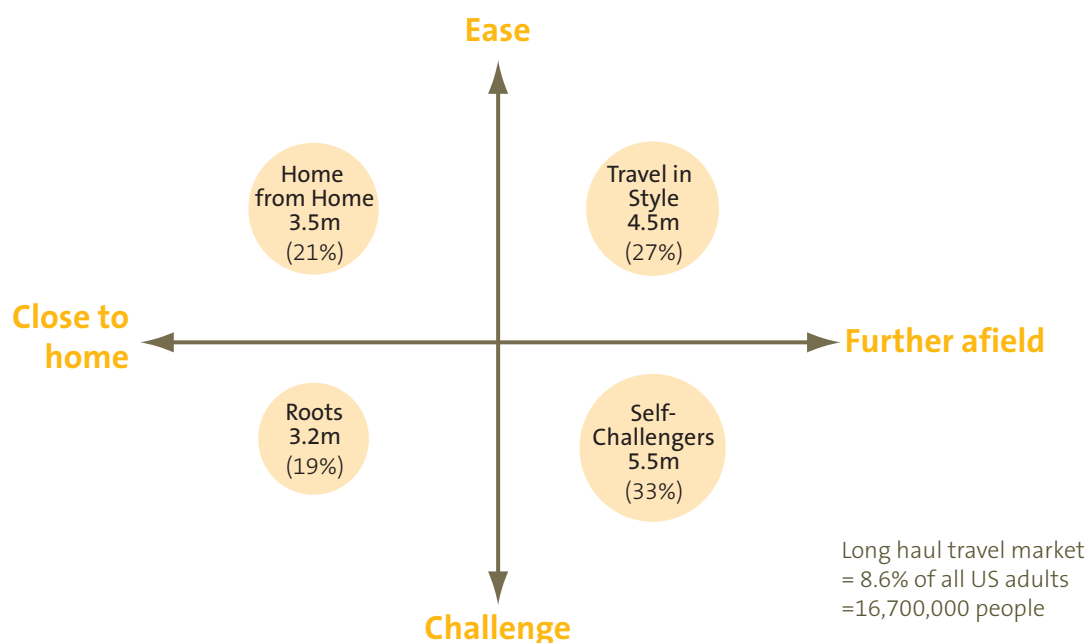
Given the various factors that come into consideration when choosing a travel destination, the position of each segment was determined using a combination of emotional, attitudinal and behavioural elements.

In segmenting the US 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 four distinct segments in the US long haul travel market:

- **Self-Challengers**
- **Travel in Style**
- **Roots**
- **Home from Home**

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 the USA can be allocated to one of the four segments we've identified. Together, the four segments account for more than 16.7 million people.



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

Self-Challengers

“You haven’t really travelled until you’ve travelled to Australia” Male, 47

Segment highlights

Segment size	5.5 million long haul travellers / 33% of the long haul market
Heart of the segment	Travel fulfils an inner drive to challenge myself and is an affirmation of my identity
Profile	<p>Compared to other long haul travellers in the USA, Self-Challengers:</p> <ul style="list-style-type: none">• Are more likely to be single and living alone• Are more likely to be living in the Mountain and Pacific regions• Have a wide range of interests, which are more likely to include reading, hiking, water sports, cycling, educational courses and more• Are less likely to be interested in shopping and going to restaurants• Are more likely to be a member of an airline loyalty scheme and more specifically, be a member of Continental Airlines loyalty scheme• Range between 18 and 75 years of age
Approach to long haul travel	<p>Self-Challengers love to travel. They are very keen to immerse themselves in destinations to experience the culture and lifestyle, particularly a-typical tourist destinations that are untouched by American influences and different to their own previous experiences.</p> <p>Self discovery is very important when they travel. They are drawn to exploring a destination – from the backstreets to the countryside and wildlife, rather than sticking to the standard route. They combine this element of self discovery and education with materialism, collecting mementos as they go.</p> <p>Self-Challengers are not pre-occupied with luxury and comfort when travelling, nor share needs common with other long haul travellers. They are less bothered by risk, preferring to mix with locals and reject influences from home.</p>
Australia as a destination	<p>Australia is without doubt an appealing long haul destination for Self-Challengers, with more Self-Challengers having visited Australia previously than among other segments.</p> <p>While the drivers for visiting Australia are consistent with other long haul travellers, the rational barriers held by other long haul travellers are rejected by Self-Challengers. Self-Challengers are less likely to feel that Australia is too far, is not unique, is more suited to young people or is an impossible dream when compared to Europe.</p> <p>Australia defines their idea of serious travel and of all segments they are the most likely to have a sense of what Australia offers them.</p>
What inspires them?	<p>When deciding where to go on their next holiday, Self-Challengers are more likely than other long haul travellers to be inspired by:</p> <ul style="list-style-type: none">• Magazine and newspaper articles• Friends who have been to the destination• Travel books/guides• TV travel programmes and documentaries• Internet travel sites• History books and famous explorers

“I want to experience a culture completely different than my own. I also want to become fluent in Spanish. I’m considering Guatemala or Ecuador.” Female, 25

“I’m planning to retire at 34, and then spend the rest of my life travelling” Male, 29

How do I reach them in the Media?

Self-Challengers media preferences include:

- They are less likely to read a newspaper than other long haul travellers. However, they are more likely to read the New York Times weekday edition and less likely to read the Chicago Tribune. Moreover, they are more likely to read the arts section and less likely to read the sports section of newspapers
- They are limited users of television however they are more interested in news, current affairs, documentaries and travel programmes than other segments. Self-Challengers are more likely to watch PBS and less likely to watch CBS
- Self-Challengers are particularly interested in travel magazines and some National Geographic titles, however are less likely to read the AARP Bulletin
- They spend the same amount of time on the internet as other groups, yet are more likely to source information about travel, sports or products and less likely to play games online. Frommer’s, Lonely Planet and Tripadvisor are some of the travel websites Self-Challengers are more likely to visit than other long haul travellers
- They are more frequent movie-goers with more than 1 in 3 seeing a movie at least once a month
- Self-Challengers are more likely to listen to alternative music

Planning timeline

Self-Challengers start the planning process at a similar stage to other long haul travellers. However, they generally book flights and accommodation closer to departure than other segments.

- Start planning: 31 weeks before departure
- Book flights: 16 weeks before departure
- Book accommodation: 14 weeks before departure

Planning sources

Self-Challengers are more likely to use online resources when planning their holiday. They are more likely to book flights and accommodation online and are less likely than other long haul travellers to book accommodation through traditional sources such as travel agents.

Travel Profile

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

- Travel by themselves
- Travel for longer periods of time
- Stay in moderate and budget hotels, with friends or go camping
- Have a higher number of vacation days available to them

Further to this, Self-Challengers are less likely to go on a cruise ship and have a lower per day average spend per person than other segments (\$180)

Holiday activities

Self-Challengers have a wide range of activities they like to do on holiday and are more likely to plan their holidays around:

- Visiting historical sites
- Cultural events
- Native culture
- Experiencing nature
- Hiking

“The rock was a religious experience. Remarkable. Very scary fauna in Australia. Snakes and spiders. The thing is awesome. Mind blowing. Like Devil’s Tower in Wyoming. It’s one of those one of a kind natural things that you see and it takes your breath away.” Male, 40

Holiday activities
(continued)

In contrast to this, Self-Challengers are less likely to plan their holidays around sightseeing tours. When travelling, Self-Challengers are more likely than other long haul travellers to:

- Sample local cuisine
- Shop for local products
- Visit local markets
- Travel outside town centres
- Attend local events/festivals

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

Self-Challengers are more likely to seriously consider going to Australia than other long haul travellers.

Other long haul destinations of interest include:

- UK
- Italy
- New Zealand
- The Caribbean
- Germany
- The Netherlands
- Switzerland
- Spain
- The Pacific Islands
- Czech Republic
- Brazil
- South Africa
- Scandinavia
- Kenya
- Tanzania
- Iceland
- Turkey
- Hungary

Travel in Style

"I want to be served. I'm always serving people." Female, 48

Segment highlights

Segment size	4.5 million long haul travellers / 27% of the long haul market
Heart of the segment	Superior vacation experiences are satisfying but they also affirm status
Profile	<p>Compared to other long haul travellers in the USA, Travel in Style travellers:</p> <ul style="list-style-type: none">• Are more likely to be single and living alone• Are less likely to be married• Are the most likely to be college graduates, however they are the least likely to have a post-graduate education• Have a wide range of interests. They are more likely to enjoy eating out, shopping, movies, theatre, golf and clubbing. They are less likely to be interested in reading or DIY activities• Are more likely to be a member of the Continental Airlines loyalty scheme <p>Travel in Style travellers range from 18 to 75 years of age; however they are slightly more likely to be 18 to 24.</p>
Approach to long haul travel	<p>Travel in Style travellers see travel as a big part of their life and a way to indulge in a life of luxury. Their choice of destination when travelling is strongly influenced by the opinions of their peers, for whom they wish to make a favourable impression. To this segment, long haul travel seems more sophisticated.</p> <p>Less likely to visit friends or family, Travel in Style travellers want to see all the famous sites and visit different locations on each trip. However, they do not generally like to go too far from their comfort zone.</p>
Australia as a destination	<p>Australia delivers for Travel in Style that go, but for most it's not seen as a destination that is a must visit now. Among those that have visited Australia, they are less likely to revisit than those from other segments.</p> <p>Travel in Style travellers share similar drivers and barriers with other long haul traveller segments, however they are slightly less convinced of the uniqueness of Australia and the beauty of Australia's beaches.</p>
What inspires them?	<p>As with other long haul travellers, Travel in Style are inspired by friends and family and articles concerning long haul destinations across a range of media (including print, television and online). However, they are more likely to be inspired by advertising or the recommendations of specialist travel agents.</p>

“I would ask the concierge at the hotel, not locals, for restaurant ideas.” Male, 52

How do I reach them in the Media?

Travel in Style travellers media habits include:

- They are more likely to read the New York Times, Chicago Tribune and Chicago Sun Times. They are also more likely to read the leisure and entertainment sections. 95% always read the travel section
- They are more likely to watch TV and have the fewest non-viewers. They are specifically more interested in comedy and travel & leisure programs and are more likely to watch ABC, CBS, The Travel Channel and the Weather Channel as well as a range of cable entertainment channels. They show less interest in documentaries, news and current affairs and drama and are more likely to read TV Guide
- Magazine preferences include travel and leisure publications, National Geographic, Bon Appetit, Food and Wine and People magazine
- They spend a similar amount of time on the internet as other segments however are less likely to use it at home. When online, they are more likely to play games and less likely to use the internet to gather information
- Travel in Style are more likely to listen to adult contemporary music

Planning timeline

Travel in Style travellers start the planning process at a similar stage to other long haul travellers however; they generally book flights earlier than other segments.

- Start planning: 35 weeks before departure
- Book flights: 19 weeks before departure
- Book accommodation: 18 weeks before departure

Planning sources

Travel in Style traveller’s main source of planning information is through travel agents. Many visit specialist travel agents for research and making bookings. Travel in Style are more likely than other segments to book accommodation through an online travel agent or a tour operator.

Travel in Style travellers are pre-occupied with choosing the fashionable destination. As such they pay attention to advertising, travel agents and their peers.

Travel Profile

On a long haul trip, Travel in Style are more likely to:

- Travel as part of an organised tour
- Stay at an all inclusive resort, luxury hotel or go on a cruise ship
- Have the highest total average spend per person (\$3,283)
- Have the highest average spend per day (\$241)

In addition to this, Travel in Style travellers:

- Are less likely to travel with children and the least likely to travel alone
- Have a shorter average stay and are less likely to stay for 4 weeks or more
- Are less likely to stay with family or friends
- Are entitled to less annual leave than other long haul travellers

“I don’t think the word is really out there for Australia in the US.” Male, 29

“I feel very comfortable there, the water is incredibly warm, incredibly clean, the whole country is very very clean” Male, 42

Holiday activities

Travel in Style are more likely than other long haul travellers to plan vacations around:

- Sightseeing tours
- Cruises
- Health spas
- Golf

Once on vacation, Travel in Style travellers are more likely to go to health spas, guided tours and casinos and are less likely to shop in local stores and visit or stay in local towns.

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

Travel in Style travellers are more likely to seriously consider going to Australia than other long haul travellers.

Other long haul destinations of interest include:

- Italy
- The Caribbean
- New Zealand
- Spain
- The Pacific Islands
- France
- UK
- Germany
- Switzerland

Roots

“We’re not going to visit the normal places as much, we’re going to other areas, because we’ve been to the first ones.” Male, 38

Segment highlights

Segment size	3.2 million long haul travellers / 19% of the long haul market
Heart of the segment	Profound connection to a place that has meaning for them
Profile	<p>Compared to other long haul travellers in the USA, Roots:</p> <ul style="list-style-type: none">• Are more likely to be married and not living alone• Are the most likely to have a post-graduate education• Are more likely to state their racial origin as other (not white/black or Asian)• Have a wide range of interests and are more likely to include DIY among them. However they are less likely to enjoy shopping or going to the movies• Are more likely to have a household income of \$50 - \$100K <p>Roots range in age from 18 – 75 years, however there are slightly fewer 25 – 35 year olds.</p>
Approach to long haul travel	<p>Roots are strongly drawn to places that they feel a connection to through their heritage, which may include travelling with or to visit friends and family. They like to learn some of the local language and are concerned about the threat of terrorism.</p> <p>They do not travel to challenge themselves and are not opposed to repeat visits to locations. The tourist road is not of interest to these travellers and they are not interested in spoiling themselves or collecting mementos. They are less likely to be influenced by price or plan out all aspects of their vacation.</p>
Australia as a destination	Unlike other long haul travellers, Australia is not seen as a location to visit only once. Other than this, Roots have very similar drivers and barriers to other long haul travellers, being particularly attracted to the heritage listed areas of Australia while having reservations about what they perceive as emotional and physical remoteness.
What inspires them?	<p>Roots are more likely to be inspired by family and friends who live at the destination than other long haul travellers. They are also inspired by:</p> <ul style="list-style-type: none">• Friends and family who have been there• Newspapers and magazines
How do I reach them in the Media?	<p>The best media sources in which to reach Roots include:</p> <ul style="list-style-type: none">• They are more likely to read local paid for newspapers. In general, they are more likely to read the news and current affairs section and less likely to read the entertainment sections• They spend an average amount of time reading magazines but are less likely to read Frommer’s Budget Travel, Conde Nast Traveller and other travel and leisure magazines. They are, however, more likely to read Readers Digest and National Geographic• Roots are less likely to watch television, but are more likely to tune to news, current affairs and drama programs including Fox News, The Weather Channel, ESPN and PBS• They are more likely than other segments to listen to news and talk based radio stations• When it comes to internet usage, Roots are less likely to use the internet to research interests or travel information

“Every year, the whole family converges on the same village in Spain, from all over the world. It’s great to connect with each other and our background.” Female, 55

“It’s nothing against Australia, but we’re drawn to Europe more. More sense of culture and history, I guess.” Male, 45

Planning timeline

Roots travellers begin the planning process later than other long haul travellers, generally starting planning and booking flights later than other segments.

- Start planning: 30 weeks before departure
- Book flights: 16 weeks before departure
- Book accommodation: 15 weeks before departure

Planning sources

Roots travellers use friends and family at the destination as the main source of planning for all aspects of the process other than arranging flights. This segment is also more likely to use the internet as a source of information regarding local prices.

A key trait of this segment is their desire to avoid being tourists. As such, they avoid travel guides, agents and tour operators. Roots travellers are more likely than other segments to book their flight only and a few nights accommodation (if any at all) prior to departure and are less likely to make accommodation arrangements through a travel agent.

Travel Profile

On a long haul trip, Roots are:

- More likely to travel with their children
- The most likely to travel alone
- Spend more days at the destination and are more likely than other segments to spend 4 or more weeks at a destination
- Are more likely to stay with their family and less likely to stay in a luxury hotel or cruise ship
- Are entitled to more annual leave
- Are likely to spend less on the trip in total (\$2,828) and per day (\$176)

Holiday activities

When organising a long haul vacation, Roots are more likely than other long haul travellers to plan their trip around discovering more of their family’s heritage. Moreover, they are less likely to plan vacations around shopping.

Once at the destination, Roots are more likely to:

- Visit friends and family who live at the destination
- Spend time with family by vacationing together
- Shop in local stores and purchase locally made products

In addition, Roots are less likely than other long haul travellers to go on guided tours.

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

Roots are less likely than other long haul travellers to seriously consider visiting Australia.

Long haul destinations of interest (other than Australia) include:

- | | | | | |
|--------------|-----------------|----------|-----------------------|---------------|
| • Italy | • The Caribbean | • UK | • The Pacific Islands | • New Zealand |
| • The Baltic | • Germany | • France | • The Netherlands | • Switzerland |
| • Hong Kong | • Japan | • China | • Korea | |

Home from Home

“Long haul is a way to get ‘quality time’ with the kids.” Female, 42

Segment highlights

Segment size	3.5 million long haul travellers / 21% of the long haul market
Heart of the segment	I’m happy to go where other Americans go
Profile	<p>Compared to other long haul travellers in the USA, Home from Home travellers:</p> <ul style="list-style-type: none">• Are the most likely to be married and have children living at home• Are more likely to be high school graduates and have a post-graduate education• Are more likely to be living in New England or the North East Central and mid-Atlantic states and are less likely to live in the South Atlantic states• Share many of the same interests as other long haul travellers but are less interested in backpacking/hiking, bird/animal watching, diving, going to bars, music concerts, winter sports and health & fitness• Range between 18 and 75 years of age
Approach to long haul travel	<p>Home from Home travellers are less experienced and as a result, less confident travellers. Speaking English, having an American influence and safety in particular tend to override all other aspects when choosing a long haul travel destination.</p> <p>Home from Home travellers like to see all the famous sights, however they like to do this without immersing themselves in the destination or giving up the comforts and securities they enjoy at home.</p> <p>They do not share many of the characteristics of other long haul travellers, in fact are content with being tourists and like to visit tourist oriented destinations.</p>
Australia as a destination	<p>Home from Home travellers are more likely than other segments to have never visited Australia. They lack knowledge about Australia which is demonstrated in their disinterested attitude towards Australia. There are other places they’d like to go first and few could see themselves going more than once. However, it is a real advantage that Australians speak English.</p> <p>Home from Home travellers also tend to hold more rational barriers to visiting Australia than other segments, including the distance and amount of time required to get here.</p>
What inspires them?	<p>Home from Home travellers are influenced by similar factors to other long haul travellers including:</p> <ul style="list-style-type: none">• Friends and family who have been there• Magazine and newspaper articles• Advertising• TV travel programmes

“I mean to show you how obnoxious I am, I went to France and stayed in an American hotel, I just don't like to be uncomfortable when I travel.” Male, 40

“As long as it's English speaking - you know it's the most popular second language everywhere except for France.” Male, 26

How do I reach them in the Media?

The best media sources in which to reach Home from Home travellers include:

- They are less likely to read the leisure section of newspapers and less likely to read the New York Times. They pay particular attention to the entertainment section
- They are more likely to read AARP Bulletin and TV guide and are below average readers of National Geographic
- Home from Home are more likely to watch CBS and are particularly fond of soaps, daytime TV, and home shopping programs. On the other hand they are less likely to watch news, drama, comedy, documentaries, food and travel programs
- They spend a similar amount of time on the internet as other travellers but are less likely to use the internet to search for information about products or services, to receive online newsletters or to source travel information
- Home from Home travellers are less likely to listen to news, classical music or talk based radio stations
- They go to the movies relatively infrequently

Planning timeline

Home from Home travellers begin planning very early, with all stages of the planning process taking place earlier than other long haul travellers:

- Start planning: 36 weeks before departure
- Book flights: 19 weeks before departure
- Book accommodation: 21 weeks before departure

Planning sources

Home from Home travellers use similar planning sources to other long haul travellers, however are less likely to include experiences seen in TV documentaries or in history books in the planning process. They are less likely to use the internet when planning.

In a large part due to their inexperience and lack of confidence, they are more likely to make arrangements through a travel agent or club and less likely to source aspects of the vacation independently. They are considerably more likely to make all arrangements at a common source before departure, leaving very little to chance on their arrival at the destination.

Travel Profile

On a long haul trip, Home from Home travellers are more likely than other segments to:

- Travel with a school/college group
- Travel in larger groups
- Travel for a shorter period of time
- Stay on a cruise ship

Moreover, Home from Home travellers are less likely to stay in budget hotels or backpacker/youth hostels and have less vacation time that they are able to take in one go. Their average spend is consistent with other long haul travellers in the US market.

“Europe, I picture party. South America, Brazil, Carnival. Then Australia - we’re clueless, we don’t know anything.” Female, 27

“Australia in a sense is a lot like the United States, like Americans, it seems interesting” Male, 40

Holiday activities

Home from Home plan their vacations around similar activities to other long haul travellers, however they are more likely to plan vacations around theme parks and less likely to plan around experiencing native culture.

Once at the destination, Home from Home travellers are more likely to go on guided tours and cruises, however are less likely to take part in activities that generally attract long haul travellers such as shopping, eating in local restaurants and exploring the destination.

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

Home from Home travellers are less likely to have visited, seriously consider visiting, intending to visit or have booked to visit Australia than other long haul travel segments within the US market.

Other than France, the UK, Italy and the Caribbean, Home from Home Travellers are less likely to have visited, seriously consider visiting, intending to visit or have booked to visit any long haul destinations than other long haul travellers.

When asked, Home from Home travellers show some interest in the following long haul destinations other than those mentioned previously:

- Germany
- Switzerland
- The Netherlands
- Austria
- New Zealand
- Greece
- Spain
- The Pacific Islands
- Japan
- Hong Kong
- Czech Republic



Identifying Australia's most valuable target markets

Of the four segments identified in the US travel market, Self-Challengers and Travel in Style are the segments specific to the US market that Tourism Australia has identified as core targets.

These two segments clearly have the greatest potential to generate income for Australian tourism and deliver a good return on our marketing investment.

In addition, Self-Challengers and Travel in Style travellers 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 Travel in Style 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 two segments; Roots and Home from Home. Members of these segments will still visit Australia and the segments may well be appropriate targets for parts of the Australian tourism industry.

There is the opportunity to bridge current barriers and enhance the drivers exhibited by these two segments by enhancing awareness and educating the American long haul market and fill the Australian vacuum in the American mindset. This will assist in creating a buzz about Australia as a dynamic, energetic destination that is a must visit.

Home from Home 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 are looking for destinations where they feel safe and English is the primary language
- They are good yield prospects

Those who can offer Home from Home a high quality, relaxing holiday - for example, all-inclusive resorts and cruise ships, 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 US target market.

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

- Australia's understanding of the US 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 USA segmentation information in this document, please refer to:

- Experience Seekers in the USA – understanding Experience Seekers in the US 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.

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