



# The UK Traveller

Segmentation of the UK market



# Market Segmentation of the UK

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## Background

Tourism Australia recognised the need for a ground up review of our understanding of the British 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 UK 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 UK (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 UK (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 British 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 British 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 British 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.

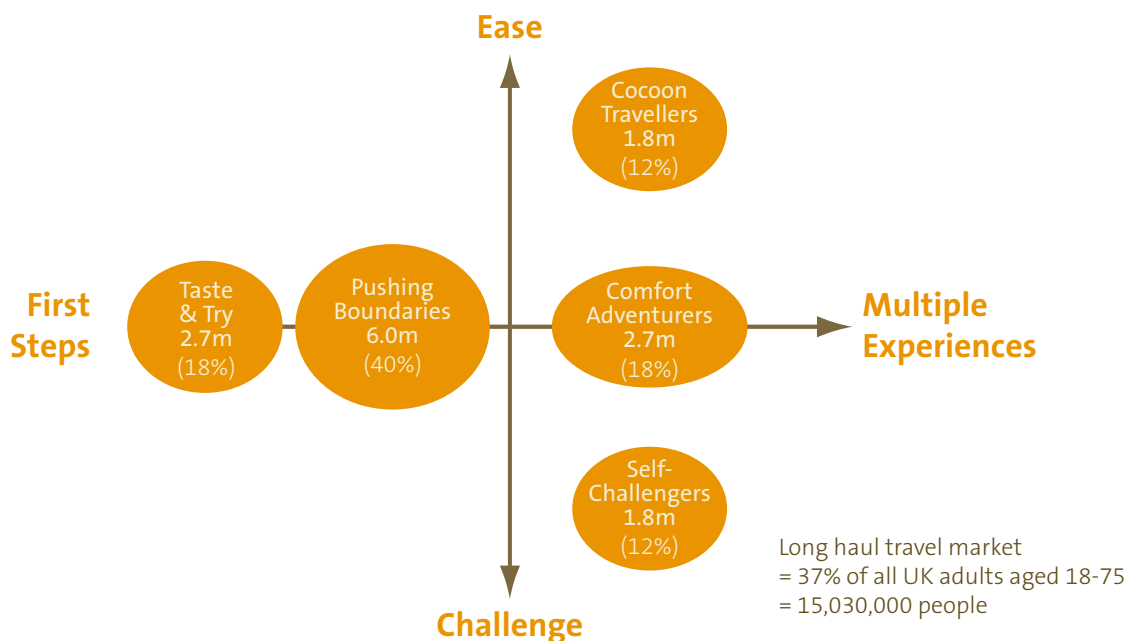
Given the various factors that come into consideration when choosing a travel destination, the position of each segment was determined using a combination of emotional, attitudinal and behavioural elements.

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

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

- Self-Challengers
- Comfort Adventurers
- Cocoon Travellers
- Taste & 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 the UK 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 third of the population of the UK aged 18-75.



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

# Self-Challengers

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

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

## Segment highlights

<b>Segment size</b>	1.8 million long haul travellers / 12% of the long haul market
<b>Heart of the segment</b>	Travel fulfils a personal drive to challenge themselves and the reward is intensely personal
<b>Profile</b>	Compared to the rest of the long haul travel market in the UK, Self-Challengers: <ul style="list-style-type: none"><li>• Are more affluent and highly educated</li><li>• Have a higher income</li><li>• Are more likely to be single</li><li>• Have the greatest range of interests including eating out, reading, going to music concerts/ theatre, hiking, DIY, self-education, outdoor and water sports and photography</li><li>• Range between 18 and 75 years of age</li></ul>
<b>Approach to long haul travel</b>	When travelling abroad, immersion in the local culture, enjoying the local lifestyle and environment are core drivers for Self-Challengers.  They perceive themselves as travellers, not tourists, and are focused on experiencing destinations before they become part of the tourist trail. Self-Challengers are focused on self-discovery through challenging experiences and want to get 'under the skin' of a destination.
<b>Australia as a destination</b>	Australia is undoubtedly a very appealing long haul destination for Self-Challengers. They exhibit no major barriers to visiting Australia, moreover they are attracted by the natural environment, people and indigenous culture and are highly knowledgeable of Australia as a holiday destination.
<b>What inspires them?</b>	When deciding where to go on their next holiday, the top sources of destination inspiration include TV documentaries and travel books.
<b>How do I reach them in the Media?</b>	The most effective media sources to reach Self-Challengers include: <ul style="list-style-type: none"><li>• They are likely to always read the travel and arts sections of newspapers, with the Sunday Times among their favourite publications</li><li>• In terms of radio consumption, they are more likely to listen to the BBC, especially BBC Radio 2, BBC Radio 4 and Classic FM</li><li>• Self-Challengers are selective TV viewers, watching the least amount of TV in comparison with other long haul travellers. When watching television, their preferences include documentaries, news, current affairs and wildlife programs</li><li>• They are the least likely to read magazines</li><li>• They are the most extensive internet users, with many using it daily for various purposes</li></ul>
<b>Planning timeline</b>	Self-Challengers display a relatively short planning cycle compared with other long haul travellers. This is also true for their flight and accommodation booking timelines. <ul style="list-style-type: none"><li>• Start planning: 25 weeks prior to departure</li><li>• Book flights: 16 weeks prior to departure</li><li>• Book accommodation: 13 weeks prior to departure</li></ul>

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

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

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

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<b>Planning sources</b>	Self-Challengers use a wide range of information sources for planning their holidays, including internet travel sites, friends and family, airline websites, newspapers, magazines and travel guides.
<b>Travel Profile</b>	On a long haul trip, Self-Challengers: <ul style="list-style-type: none"><li>• Are more likely to travel by themselves</li><li>• Are more likely to travel for about three weeks and are the most likely to travel for 8 weeks or more. On average, they are more likely to stay at a destination longer</li><li>• Are more likely to stay in budget to moderate accommodation, including hotels, hostels, and bed and breakfasts</li><li>• Spend approximately £80 a day per person, lower than the average daily spend among other long haul travellers</li></ul>
<b>Holiday activities</b>	Self-Challengers' have a wide range of interests and are more likely than other travellers to plan their holidays around: <ul style="list-style-type: none"><li>• Walking or hiking</li><li>• Nature and wilderness activities</li><li>• Cultural events</li><li>• Visiting gardens</li><li>• Bird and animal watching</li></ul> They are also likely to plan their holidays around food and wine experiences.  Once on holiday, they are more likely to: <ul style="list-style-type: none"><li>• Shop at local markets/supermarkets</li><li>• Travel around the country</li><li>• Try the local cuisine</li><li>• Meet the locals</li><li>• Explore the backstreets of a destination</li><li>• Experience indigenous culture</li><li>• Visit famous landmarks and sites</li></ul>
<b>Long haul destinations (other than Australia) they would really like to visit/seriously consider going to</b>	Self-Challengers are more likely than other segments of the UK long haul travel market to have visited Australia in the past. Despite this, Australia remains one of the top destinations of interest for Self-Challengers to visit in the near future.  Other long haul destinations of interest include: <ul style="list-style-type: none"><li>• Argentina</li><li>• Canada</li><li>• Thailand</li><li>• Ukraine</li><li>• Tanzania</li><li>• China</li><li>• South Africa</li><li>• Russia</li><li>• New Zealand</li><li>• Nepal</li><li>• Kenya</li><li>• Brazil</li></ul>

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# Comfort Adventurers

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

*“Cuba is communist and it will fade away into the future. This is the last chance to see it.”* Philip, 29

## Segment highlights

<b>Segment size</b>	2.7 million long haul travellers / 18% of the long haul travel market.
<b>Heart of the segment</b>	They seek to experience the unique and unusual without compromising their creature comforts
<b>Profile</b>	Compared to other long haul travellers in the UK, Comfort Adventurers: <ul style="list-style-type: none"><li>• Are slightly older (average age: 47)</li><li>• Are more likely to be retired</li><li>• Are more likely to be empty nesters</li><li>• Are more likely to be married</li><li>• Are more highly educated</li><li>• Have a wide range of interests including eating out, reading, gardening, theatre and photography</li></ul>
<b>Approach to long haul travel</b>	Comfort Adventurers want to see destinations before they’re discovered by the general tourist market. They are drawn to the iconic sights and have a desire to get “under the skin” of a destination.  Safety is important to them, and they like to travel in comfort and enjoy the luxuries that comes with this style of travel.
<b>Australia as a destination</b>	Comfort Adventurers know a lot about Australia and are attracted by the country’s natural environment, world heritage areas, city life and people. They are more likely to have visited Australia than the average long haul traveller.  Australia’s variety of unique wildlife, natural wonders and modern and cosmopolitan cities are major drivers for this group.
<b>What inspires them?</b>	When deciding where to go on their next holiday, the top sources of destination inspiration for Comfort Adventurers include newspapers, travel magazines and friends or family who live at the destination.

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

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

The most effective media sources in which to reach Comfort Adventurers include:

- They are more likely to read local newspapers and specifically the Daily Telegraph. However they are less likely to read The Sun
- They almost always read the travel section of newspapers and pay particular attention to the business and arts sections
- They are more likely than other long haul travellers to read National Geographic, airline, motoring and IT magazines. TV and entertainment magazines are also very popular among this segment
- They are more likely than other segments to listen to BBC4, local BBC stations and Classic FM. Moreover they are less likely to listen to BBC Radio 1
- They are the heaviest TV viewers among all long haul travellers. Their TV viewing preferences include watching documentaries, holiday and travel shows, drama, news & current affairs and wildlife programmes
- They are the least frequent cinema goers
- They are average internet users overall, however are the most likely to access the internet at home

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**Planning timeline**

Comfort Adventurers have a lengthy lead time when planning long haul travel, however this is consistent with the overall market in the UK:

- Start planning: 26 weeks prior to departure
- Book flights: 19 weeks prior to departure.
- Book accommodation: 17 weeks prior to departure

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**Planning sources**

Comfort Adventurers main sources of planning information include newspapers, magazines, airline magazines, airline and travel websites and travel agents.

A key trait of this segment is that they are open to marketing influences and are more likely to respond to publicity, promotions and branded destination messages.

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**Travel Profile**

On a long haul trip, Comfort Adventurers:

- Are more likely to travel with their spouse or partner
  - Travel for about two weeks
  - Are more likely to stay in luxury hotels, and very unlikely to stay in backpacker and budget hotels or hostels.
  - Spend more per day than the average long haul traveller; almost £120 per person
  - Have a significantly higher total spend per trip than the average long haul traveller, with an average of over £2,000 per trip
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*“Everyone else in the world seems so much more relaxed. I come back refreshed and have more goals.” Pam, 39*

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**Holiday activities**

Comfort Adventurers are more likely than other travellers to plan their holidays around photography and visiting gardens. Other activities they plan around include:

- Food and wine
- Shopping
- Attending events
- Hiking

Once on holiday, their preferred activities are consistent with the greater market and include:

- Going to restaurants
- Shopping
- Tourist sights
- Relaxing by the pool/beach
- Travelling around the country

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

Other long haul destinations of interest include:

- |               |             |                |
|---------------|-------------|----------------|
| • Thailand    | • Hong Kong | • Malaysia     |
| • The USA     | • Canada    | • China        |
| • New Zealand | • Singapore | • South Africa |

# Cocoon Travellers

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

*“I’m cocooned in semi-luxury. I get a buzz from going to a different place, but I’m not really an explorer.”* Barbara, 52

## Segment highlights

<b>Segment size</b>	1.8 million long haul travellers / 12% of the long haul travel market.
<b>Heart of the segment</b>	Superior holiday experiences are personally satisfying and affirm their status as travellers
<b>Profile</b>	Compared to other long haul travellers in the UK, Cocoon Travellers: <ul style="list-style-type: none"><li>• Are more affluent</li><li>• Have higher than average incomes</li><li>• Are more likely to own a car</li><li>• Are more likely to be married</li><li>• Are less likely to have children living with them</li><li>• Are more likely to be interested in health and fitness and less interested in music concerts or water sports</li></ul>
<b>Approach to long haul travel</b>	Cocoon Travellers planning behaviour reflects the same patterns as most other long haul travellers.  They’re happy to be considered tourists and are not actively seeking an immersive, authentic experience – they are not interested in self discovery or personal challenge when they travel.
<b>Australia as a destination</b>	For Cocoon Travellers, Australia is often one of the destinations they have always wanted to visit. However, Australia holds more of a generic appeal for them, with no distinctive drivers of that appeal.
<b>What inspires them?</b>	When deciding where to go on their next holiday, Cocoon Travellers are more likely than other travellers to be inspired by newspapers. Friends or family who have been there and TV travel programmes are also commonly acknowledged forms of inspiration when planning a holiday.
<b>How do I reach them in the Media?</b>	The most effective media sources in which to reach Cocoon Travellers include: <ul style="list-style-type: none"><li>• They are more likely than other travellers to read the Sunday Times and Sunday Mirror. Although to a lesser degree, they are also more likely to read the Evening Standard and Financial Times. They tend to always read the news, TV, entertainment and travel sections of a newspaper</li><li>• In terms of magazines, they are more likely to read TV and entertainment magazines and Marie Claire. Other popular publications include store magazines and Hello</li><li>• They listen to radio in a similar manner to other long haul travellers. BBC Radio 1 and 2 are among the more popular stations for this segment</li><li>• Films, documentaries, and house &amp; garden programmes are popular television genres among Cocoon Travellers. They are more likely than other travellers to watch house and garden programmes and less likely to watch comedy</li><li>• Cocoon Travellers are the most frequent cinema goers, with some going weekly</li><li>• They are the lowest frequency internet users. When they do go online, it is usually to check their stocks, shares, investments or banking. They are less likely to use the internet for educational purposes or to view online newsletters</li></ul>

*“I would love to do something daring, but I have vertigo.”* Karenza, 40

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

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<b>Planning timeline</b>	Cocoon Travellers planning behaviour reflects the same patterns as most other long haul travellers: <ul style="list-style-type: none"><li>• Start planning: 28 weeks prior to departure</li><li>• Book flights: 22 weeks prior to departure</li><li>• Book accommodation: 24 weeks prior to departure</li></ul>
<b>Planning sources</b>	Cocoon Travellers’ main sources of planning information include high street travel agents and internet travel sites. Internet travel sites are more likely to be used by Cocoon Travellers than other long haul travellers when planning their accommodation.  When researching a destination, however, internet airline sites are more likely to be used, suggesting a deal based approach to choice.
<b>Travel Profile</b>	On a long haul holiday, Cocoon Travellers: <ul style="list-style-type: none"><li>• Are more likely to travel with their spouse or partner</li><li>• Their average length of travel is 2 weeks, however they are more likely than other travellers to travel for 8 – 10 days</li><li>• Stay in a range of accommodation types including moderate to luxury hotels or with family</li><li>• Spend over £2,000 per trip on average, more than the average long haul traveller in the UK</li></ul>
<b>Holiday activities</b>	Although not to a large degree (12%), Cocoon Travellers are more likely than the average long haul traveller to plan their holiday around playing golf. They are less likely to plan their holiday around events or festivals.  Other activities Cocoon Travellers plan their holidays around include food & wine, shopping, hiking and activities for children.  Once on holiday, they are more likely than other long haul travellers to go to amusement parks and less likely to visit local markets. Further to this, their interest in activities is consistent with the average long haul traveller in the UK.
<b>Long haul destinations (other than Australia) they would really like to visit/seriously consider going to</b>	Other long haul destinations of interest include: <ul style="list-style-type: none"><li>• The USA</li><li>• Canada</li><li>• New Zealand</li><li>• The Maldives</li><li>• Mexico</li><li>• South Africa</li></ul>

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# Taste & Try

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

## Segment highlights

<b>Segment size</b>	2.7 million long haul travellers / 18% of the long haul travel market
<b>Heart of the segment</b>	The excitement of seeing the wider world with their own eyes for the first time
<b>Profile</b>	Compared to the rest of the long haul travel market in the UK, Taste & Try travellers: <ul style="list-style-type: none"><li>• Are more likely to be younger than the average long haul traveller – they are more likely to be aged under 24 and less likely to be between 45 and 54 years of age</li><li>• Are the least educated among all long haul travellers and are below average income earners</li><li>• Have less holiday leave available to them</li><li>• Have fewer interests and hobbies, which are less likely to include eating out, reading books, hiking, theatre and photography</li></ul>
<b>Approach to long haul travel</b>	<p>Taste &amp; Try travellers are inexperienced long haul travellers who are attracted to “trendy”, well known destinations. They rely heavily on recommendations from others about where to go and what to do.</p> <p>Relaxation, sightseeing and fun—sun, sea, sand and nightlife are important to them when choosing a holiday destination. Meeting like minded travellers is also important to them, making them more interested in tourist destinations.</p>
<b>Australia as a destination</b>	<p>Taste &amp; Try travellers are unlikely to have visited Australia before, however as a destination it holds high aspirational appeal for the segment. For many, Australia is seen as a once in a lifetime opportunity.</p> <p>Lack of knowledge about Australia as well as distance and the attractiveness of competing destinations are the biggest barriers for this segment of the UK market.</p>
<b>What inspires them?</b>	<p>The top sources of destination inspiration for the Taste &amp; Try segment include:</p> <ul style="list-style-type: none"><li>• TV travel programmes</li><li>• Friends who have been to the destination</li><li>• Family who live at the destination</li><li>• Tour operator brochures</li></ul> <p>However, Taste &amp; Try travellers are less likely than other long haul travellers to be inspired by newspapers or magazines.</p>

*“At the moment I’ve got an open mind about the type of holidays I’ll enjoy most.”* Jane, 22

*“I think of the programs on TV of the 100 things to do before I die. I want to feel like I’ve been on a long journey.”* Simon, 24

*“I want to see things and have it explained to me.”* Lorraine, 55

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

Taste & Try travellers pay attention to the following media:

- The Sun and Daily Mirror are among the more popular newspaper publications within this segment. Moreover they are more likely than other long haul travellers to read the Daily Mirror and less likely to read the Daily Mail
- They are the least likely to turn to the travel section of newspapers
- The preferred magazine genres among this segment include TV & entertainment and hobby & leisure magazines
- They listen to BBC 1 and commercial radio stations. They are more likely than others to listen to Galaxy and less likely to listen to BBC Radio 2 and 4
- They are average internet users (86% of UK long haul travellers use the internet) however are less likely to use the internet at home

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**Planning timeline**

Taste & Try travellers have a lengthy planning process before travelling; their sheer inexperience means that their planning process is much longer than other long haul travellers.

- Start planning: 35 weeks prior to departure
- Book flights: 26 weeks prior to departure
- Book accommodation: 24 weeks prior to departure

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**Planning sources**

Taste & Try travellers rely heavily on high street travel agents at all stages of the planning and booking process and they are much less likely to go to airlines or accommodation providers directly to book. Half book all their accommodation in advance.

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**Holiday activities**

Taste & Try travellers are more likely than other long haul travellers to plan around activities for children.

Once at the destination, they enjoy a range of activities consistent with other long haul travellers, however are less likely to:

- Shop for local products or visit local supermarkets
- Shop in local markets or malls
- Get to know the locals
- Visit famous landmarks and historic sites
- Travel beyond the main centre or around the country

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

Taste & Try travellers are more likely to have booked a holiday or be planning to visit Australia than other long haul travellers.

Although to a lesser extent than other long haul travellers, other destinations of interest include:

- The Caribbean
  - The USA (particularly Florida)
  - New Zealand
  - Canada
  - South Africa
  - China
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# Pushing Boundaries

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

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

## Segment highlights

<b>Segment size</b>	6 million long haul travellers / 40% of the long haul travel market
<b>Heart of the segment</b>	They have caught the travel bug and are hungry for more
<b>Profile</b>	Compared to other long haul travellers in the UK, Pushing Boundaries are: <ul style="list-style-type: none"><li>• More likely to be between 25 and 34 years of age and are younger on average than other long haul travellers</li><li>• Have a lower average income</li><li>• Have interests that match other long haul travellers although are less likely to include eating out and photography</li></ul>
<b>Approach to long haul travel</b>	Pushing Boundaries travellers like to travel with more experienced travellers so that they can benefit from someone else's knowledge and experience. As such they are drawn to organised group tours.  Their needs as travellers are varied; however their lack of experience defines them. They are driven by similar factors to other long haul travellers.
<b>Australia as a destination</b>	9 out of 10 Pushing Boundaries travellers have not visited Australia before, making this segment the least likely to have visited Australia.  There is to a certain extent a lack of knowledge about Australia in this segment, affecting interest in visiting Australia. Any drivers exhibited by this market are consistent with those exhibited by the greater long haul travel market.
<b>What inspires them?</b>	Pushing Boundaries travellers get holiday inspiration from a range of sources including: <ul style="list-style-type: none"><li>• Travel agents</li><li>• Family or friends who have visited the destination</li><li>• Family who live at the destination</li><li>• TV travel programmes</li></ul> They are more likely to value the opinion of travel agents and are keen to visit trendy destinations.
<b>How do I reach them in the Media?</b>	Pushing Boundaries travellers media usage is consistent with the average long haul traveller, however, they rarely read the travel sections of newspapers and are the least likely to watch travel and holiday programmes on television.  They are less likely to read motoring magazines or listen to Classic FM radio.

*'This trip I am going with a friend who has never been out of Europe. This time I will be the guide.'*

Alex, 21

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

<b>Planning timeline</b>	<p>Pushing Boundaries show planning behaviour that is relatively similar to most other long haul travellers in the UK:</p> <ul style="list-style-type: none"> <li>• Start planning: 29 weeks prior to departure</li> <li>• Book flights: 22 weeks prior to departure</li> <li>• Book accommodation: 21 weeks prior to departure</li> </ul>
<b>Planning sources</b>	<p>Pushing Boundaries travellers make use of high street travel agents at all stages of the planning and booking process.</p> <p>Internet travel sites are also popular mechanisms for planning a long haul holiday among Pushing Boundaries travellers.</p>
<b>Travel Profile</b>	<p>When planning a long haul vacation, Pushing Boundaries travellers:</p> <ul style="list-style-type: none"> <li>• Are more likely to travel with family members; more than half travel with their spouse or partner</li> <li>• Have the lowest average spend per trip (£1,530) and spend only around £83 per day</li> <li>• 1 in 4 Pushing Boundaries travellers stays with their family</li> </ul>
<b>Holiday activities</b>	<p>Pushing Boundaries travellers plan their holidays around similar activities to other long haul travellers. The more popular activities to plan around include:</p> <ul style="list-style-type: none"> <li>• Food and wine</li> <li>• Shopping</li> <li>• Going to clubs / bars</li> </ul> <p>Moreover, once on holiday they are interested in similar activities to the average long haul traveller. Activities of note include:</p> <ul style="list-style-type: none"> <li>• Going to restaurants</li> <li>• Relaxing by the beach / pool</li> <li>• Shopping</li> <li>• Enjoying the nightlife</li> <li>• Visiting famous locations/ landmarks</li> </ul>
<b>Long haul destinations (other than Australia) they would really like to visit/seriously consider going to</b>	<p>In general, Pushing Boundaries travellers are less likely than other long haul travellers to have visited, or be interested in visiting Australia in the near future. Long haul destinations of interest include:</p> <ul style="list-style-type: none"> <li>• The Caribbean</li> <li>• Canada</li> <li>• South Africa</li> <li>• The USA</li> <li>• New Zealand</li> </ul>

# Identifying Australia's most valuable target markets

Of the five segments identified in the UK travel market, Comfort Adventurers, Self-Challengers and Cocoon Travellers are the segments specific to the UK market that Tourism Australia has identified as core targets.

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

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

- **They know something about what Australia has to offer, so the education task is easier;**
- **They are experienced travellers — that's what they love to do — so the usual barriers of cost and distance are much less important to them;**
- **They have the greatest potential to travel to Australia in the short to medium term.**

For all these reasons, we believe that marketing Australia to Comfort Adventurers, Self-Challengers and Cocoon 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: Taste & Try and Pushing Boundaries. Members of these segments will still visit Australia and the segments may well be appropriate targets for parts of the Australian tourism industry.

Taste & Try and Pushing Boundaries share many of their attitudes to travel with Comfort Adventurers and Cocoon Travellers in particular (as well as Self-Challengers to a certain degree). In fact, with more travel experience, these travellers are likely to become part of the Comfort Adventurers, Self-Challengers and Cocoon Travellers segments. For this reason, Tourism Australia's marketing communications are likely to appeal to these travellers too.

## Further information

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

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

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

- **Experience Seekers in the UK – understanding Experience Seekers in the British market**

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](http://www.tourism.australia.com), or contact your local Tourism Australia office.



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