



Understanding our key tourism consumers in France, Italy and Sweden

Tourism Queensland (TQ) conducted consumer segmentation research in France, Italy and Sweden, yielding distinct consumer segments based on their attitudes and motivations to long haul travel.

TQ has identified the Self Challenger and Independent Traveller segments in France, Italy and Sweden as its primary target market, with a secondary target

market comprising Activity Seekers in Sweden. These traveller groups are attractive because they travel frequently, have above-average holiday expenditure, desire new and challenging experiences and are interested in visiting Australia. Despite being separate segments, Self Challengers and Independent Travellers share many similarities, allowing them to be targeted together.

Furthermore, as the holiday needs and experiences of Self Challengers and Independent Travellers are broadly consistent across markets (i.e. in France, Italy and Sweden), key communication messages used to attract these consumers will be effective in all three countries. Activity Seekers are sufficiently different in their holiday needs and interests that they would require different messaging to target them effectively.





Primary target market: Self Challengers and Independent Travellers



Self Challengers and Independent Travellers want to be active while on holiday and to feel alive, enriched, sociable and carefree. They enjoy exploring new cultures and meeting new people and regard holidays as a chance to stimulate their senses, to challenge themselves and have an adventure.

They are confident travellers and very keen to get right off the beaten track, to fully explore the area and immerse themselves in the local culture. These consumers are entertained and engaged by the natural environment and prefer their holiday destinations to be largely undiscovered.

A variety of Queensland product would appeal to Self Challengers and Independent Travellers' holiday needs and desired experiences including scenic hiking tracks, self-drive journeys, caves and indigenous sites, local markets, tropical islands and rainforest adventures. Regional

areas away from major tourism hubs can often deliver experiences that will appeal to this consumer group.

Imagery that will appeal to these consumers should demonstrate involvement in the natural surroundings and personal enrichment. It should not depict large tourist or family groups. The messaging must convey the depth of the experience and immersion in the culture.

Self Challengers and Independent Travellers are very media savvy so editorials and advertorials are more effective than straight advertisements. They prefer to watch news and current affairs programs on television rather than lifestyle shows, and they often seek ideas and inspiration for holidays from documentaries.

Online campaigns are very important for targeting Self Challengers and Independent Travellers.

These consumers are experienced internet users and the majority prefer to plan and book their long haul holidays independently; the internet is a preferred and influential source for inspiration and ideas, as well as for research and booking. Online chats, blogs and discussion forums are important sources of travel information and reviews, and online advertorials present another potential avenue for reaching this market. It is vital that any online campaign or viral marketing campaign is authentic as these are well educated, savvy consumers.

Self Challengers and Independent Travellers are not interested in fully planned holiday packages; they like to be spontaneous and flexible in their trip planning and to book with airlines directly. Opportunity exists for the trade to promote starter packages which encompass flights, a couple of nights' accommodation and possibly car hire; offering the freedom and flexibility for these consumers to research and book other components of their trip separately.





Secondary target market: Swedish Activity Seekers



Activity Seekers want fun and exciting holidays where they can experience something rare and different; they want to participate in as many activities as possible while seeing the world. On holidays they want to feel happy, excited, alive and exhilarated. Having the freedom to choose which activities they undertake is important, so they do not want to be locked into fully planned, package tours.

These consumers are interested in undertaking a myriad of activities and experiences that are both physically challenging and exciting. It is important they are unique experiences that they can tell their friends and family about. Activity Seekers also like to balance their personally challenging activities with rest and relaxation, so they will spend time relaxing on the beach or by the pool during their holiday to re-charge their batteries.

While Activity Seekers are interested in 'going off the beaten track', they do tend to stay in and around main tourism 'hubs' where there is easy access to a large number of activities or tours within a short distance to keep them entertained.

Imagery and messaging should focus on the feeling of having fun and demonstrate the variety of activities that are easily accessible from one or multiple 'bases', including leisure activities as well as adrenalin-filled adventures. Promotions should emphasise the unique experiences Queensland has to offer and play on the braggability of an Australian / Queensland holiday.

Activity Seekers are confident internet users and they will research their holiday destinations extensively to ensure they are aware of the activities available there. Since they are inspired by a



large range of media, it is beneficial to use an integrated campaign to create comprehensive awareness and conversion in this market. Viral promotions and interactive 'Australian themed' games offering prizes would appeal in addition to being fun, they exhibit the breadth of activities and experiences that are on offer in the destination. The call-to-action on any consumer activity should include a dedicated website which Activity Seekers can visit to thoroughly research the destination and explore potential activities and experiences.

The trade is an important component of the planning and booking process for Activity Seekers. Flexibility is important to this market, so pre-packaged and rigid itineraries will not suit. Activity Seekers will shop around for the best holiday deals available, thus tactical offers with a "From \$xxx" price point can be used to grab their attention and provide the freedom to tailor and customise their package inclusions. Promotions that offer a value-add component will also appeal; the most attractive value-adds will be activity-based, for example, promotions that offer a free bungee jump with a flight and accommodation booking.

What can I do to target these markets effectively?

The following guidelines are applicable across all three of the target markets.

1. Ensure your product is suitable for promoting internationally. For more information see Tourism Queensland's international ready program: www.tq.com.au/international
2. Provide consumers the opportunity to create their own itinerary and package inclusions, by offering flexible booking options
3. Demonstrate the variety of activities and experiences of your offering in promotional imagery. Imagery should depict consumers' key needs of feeling active, challenged, enriched and immersed in the culture. Only small numbers of people should be shown in imagery, to help portray the exclusive and unique nature of your destination and/or product
4. Become involved in marketing campaigns that have a strong online component such as a dedicated web portal, online game or competition, or a viral element
5. Ensure your product can be found online and consumers can book with you directly or through a third party. Ensure your product is listed on the Australian Tourism Data Warehouse (ATDW). For further information on ATDW, visit www.tq.com.au/atdw
6. Check your website has the ability for consumers to post reviews of their experience with your product. See Tourism Queensland's Tourism E-kit for more information, visit www.tq.com.au/ekit
7. Work with similar operators within your region to promote multiple experiences
8. Encourage reviews and recommendations in editorials, blogs and online forums - these media are more effective than advertisements
9. Offer value-add components in your promotion, such as additional activities or experiences these can help convert interest into bookings
10. Be careful when offering discounted rates - these consumers will not sacrifice a quality experience based on price alone

What should I avoid?

1. Offering only fully planned, all-inclusive packages and/or structured itineraries
2. Passive imagery and language (e.g. a lack of activities/energy) in your marketing materials
3. Experiences that appear staged, "touristy" or not authentic
4. A strong emphasis on family groups and family activities



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