RESEARCH

Australian Consumer Research 2002: Part 3

Results of the Holiday Tracking Survey

Market Research 2004-1-3

Discover our true nature

Canadian Tourism Commission

Commission canadienne du tourisme

Canada

Australian Consumer Research 2002: Part 3 Results of the Holiday Tracking Survey

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1. Introduction

1.1 Background

Roy Morgan Single Source

Roy Morgan Research's Holiday Tracking Survey (HTS) is a component of Roy Morgan Single Source, which uses the same methodology as the Morgan Gallup Poll. Under the intense public scrutiny to which political polling is subjected, the Morgan Gallup Poll has consistently been Australia's most accurate predictor of the public mindset.

1.2 Methodology

Sample

Roy Morgan Single Source uses a stratified random probability sample to ensure that all states, then metropolitan and country areas are correctly represented. Interviewing is carried out to ensure complete coverage spread evenly across all electorates, with interviewers being sent to different randomly selected "clusters" of dwellings.

Interviewing method

The HTS has two components: a face-to-face interview and a self-completion questionnaire.

Face to face survey

Most of the finance, demographic and media information is collected face-to-face.

Each weekend (12 per quarter) over 1,000 people are interviewed face to face – accumulating to a 12 month sample of more than 50,000, spread by population over the cities and country areas of all six states and the two territories.

Only one person aged 14 years and over is interviewed per dwelling. The sample is weighted by age, sex and area to be representative of the Australian population 14 years and over. After each round of interviewing a proportion of respondents are recontacted as a quality control measure.

A large sample collected continuously over the year means that samples of lower incidence populations can be accumulated week by week to the desired size, both accurately and economically. Consistent methodology means that findings from a series of surveys are strictly comparable and trends can be charted with a high degree of confidence.

The approximate breakdown of the sample is:

- Sydney 10,000
- NSW Country incl. ACT 7,500
- Melbourne 8,500
- Victoria Country 3,500
- Brisbane 3,500
- Qld Country 4,500
- Adelaide 3,500
- SA Country & NT 1,250
- Perth 3,500
- WA Country 1,250
- Tasmania 3,000

Note: We deliberately oversample in Tasmania so that different areas of the state can be considered, despite its small population.

Self-completion survey

While most of the finance, demographic and media information is collected face-to-face, the HTS and additional detailed information, including activities and interests, attitudes and opinions, Internet usage and other product data are collected as part of the self-completion questionnaire.

Following the face to face interview, all respondents are offered the self-completion survey and approximately 25,000 of these are processed in each twelve month period. They are also weighted by age, sex and area to be representative of the Australian population. Because the self-completion data comes from respondents who participated in the face to face interview it can be directly integrated.

In report tables, please note legend as follows:

Positive skew 5% or over

Negative skew 5% or over

Canadian exchange rate = 1 AUD$ to 0.8998843 CAD$

2. Australian Market Conditions

This chapter looks at the general "mood and mind" of the population including consumer confidence and attitudinal profiles.

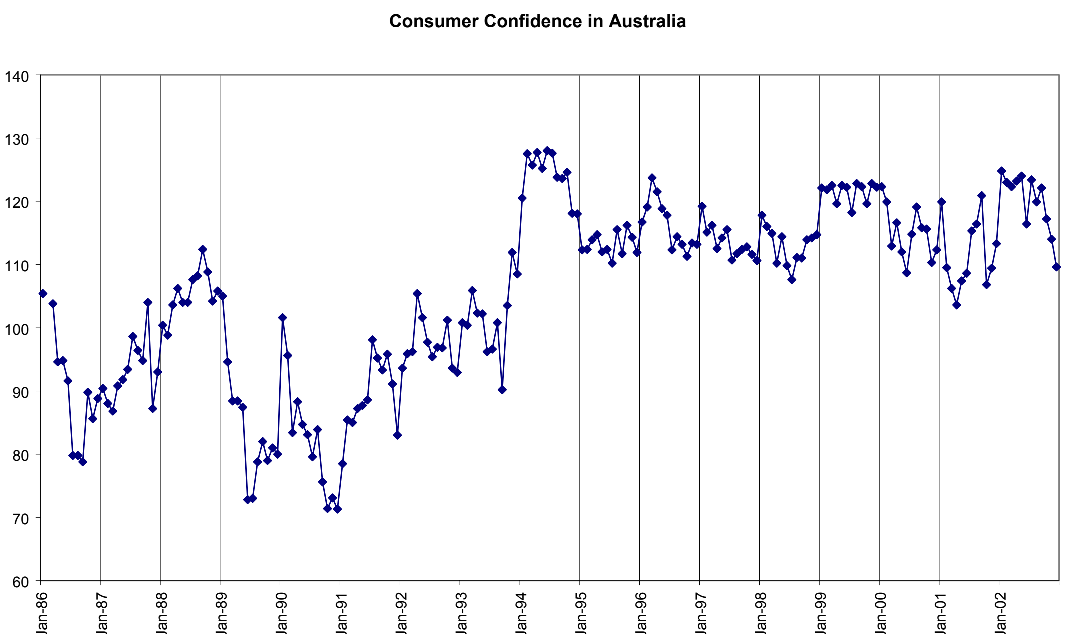
2.1 Consumer Confidence

The Roy Morgan Consumer Confidence Rating is derived from respondents' answers to five key questions regarding their evaluation of their personal financial situation and economic conditions in general. As shown in the chart below consumer confidence can be influenced by economic news and world events such as:

- Concerns over the introduction of the Goods and Services Tax (January - June 2000);
- The terrorist attacks on 11 September 2001; and
- The RBA's decision to increase official interest rates in May 2002.
- Bali bombings in November 2002
- War in Iraq

The first half of 2002 saw confidence levels comparable to the peaks of 1994 and early 1999 as Australian consumers felt themselves to be well insulated from the global economic downturn. Increases in official interest rates domestically, growing concerns over the prospects of war and Iraq and international terrorism such as the Bali Bombings have contributed to a decline in confidence over the second half of the year.

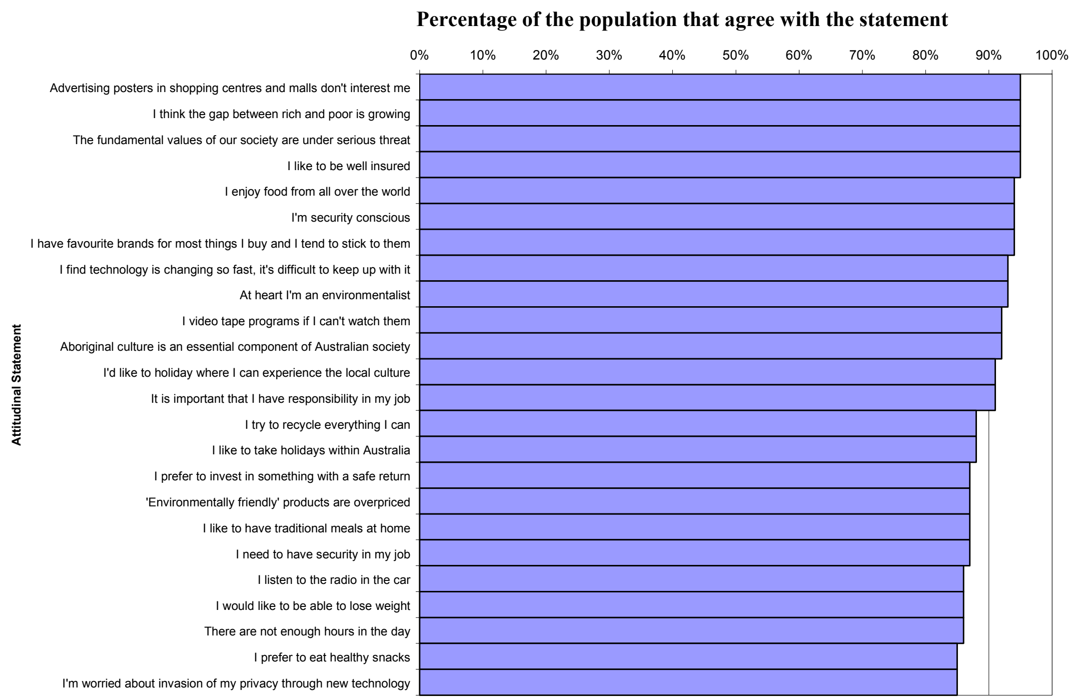
Figure 1: Consumer Confidence in Australia



2.2 Attitudes in the Australian Market

Over the two-year period Jan 01 – Dec 02, societal issues have emerged as the strongest attitudes held by the Australian population. Rejection of advertising, inequality and threat to mankind top this list. This is not surprising in light of the global political climate throughout this time. Issues regarding self, such as being well insured, enjoying multicultural food, security consciousness and brand favourability are also significant. The strongest attitudes to holidays are geared towards environment and culture, specifically the Australian Indigenous culture. Popularity of this kind of holiday is likely to be reinforced by many Australians liking to take holidays within Australia. Aside from the threat of safety, the television campaign 'See Australia' featuring television personality Ernie Dingo may have had an influence on these attitudes.

Figure 2: Attitudes of the Australian Population

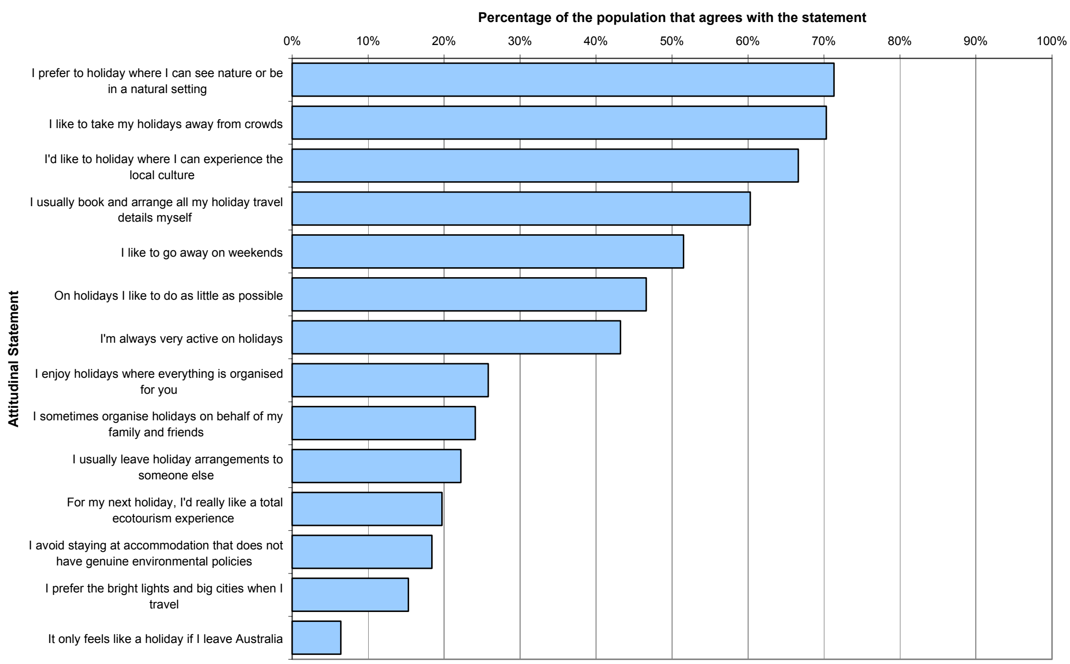


Base: Australian population Roy Morgan Single Source January 2001 – December 2002 (n=51,919)

2.3 Holiday Attitudes

An examination of the population's attitudes towards holidays shows the popularity of environmental and cultural holidays. This is supported by Australians' desire to be away from crowds and self-determine holiday details rather than be organised by a third party. Polarisation exists in terms of people preferring to do nothing on holidays versus being very active. Travel is popular with Australians however, with over half liking to go away on weekends at least.

Figure 3: Holiday Attitudes



Base: Australian population Roy Morgan Single Source January 2001 – December 2002 (n=51,919)

3. Advertising Awareness

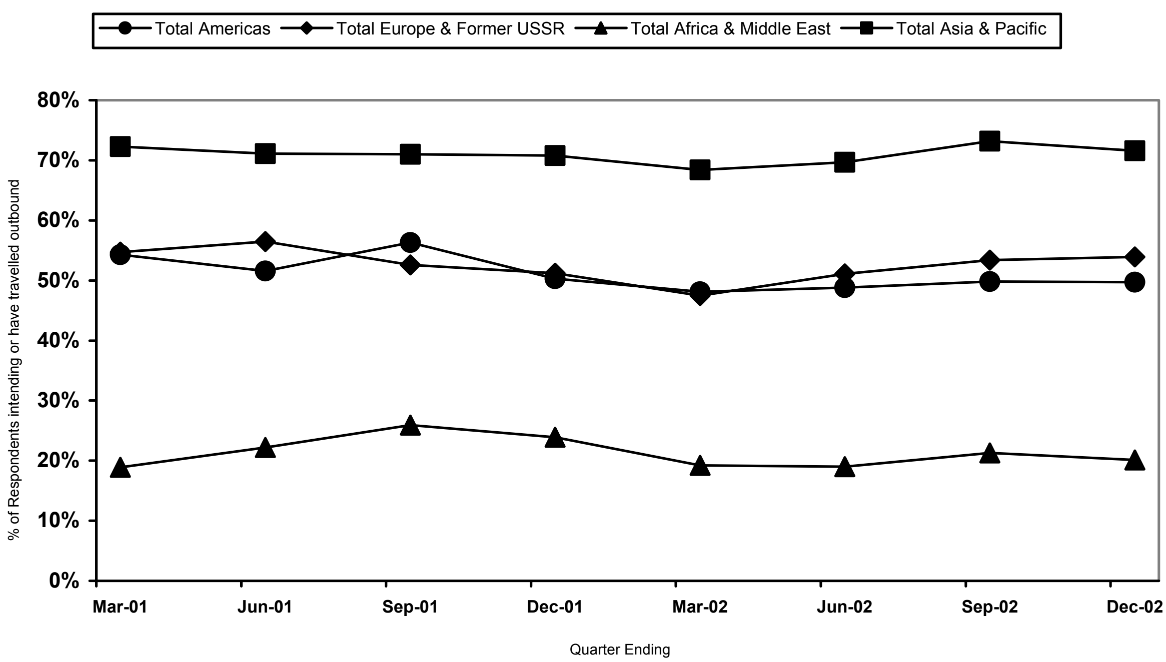
This chapter examines prompted advertising awareness levels among Australians who have either travelled overseas in the last 12 months or intend travelling overseas on their next holiday or leisure trip in the next 3 years. Analysis is at both the regional and country-specific level, with particular attention to Canada and key competitor destinations.

3.1 Advertising Awareness – Overseas Regions

Overall, advertising awareness of international regions has been consistent since March 01.

The Asian and Pacific regions achieve the highest level of awareness among Domestic travellers or intenders which is expected given the proximity of this region to Australia and advertising thereof. This is well ahead (15 to 20 percentage points) of awareness levels for Europe and the Americas.

Figure 4: Prompted Advertising Awareness by Region

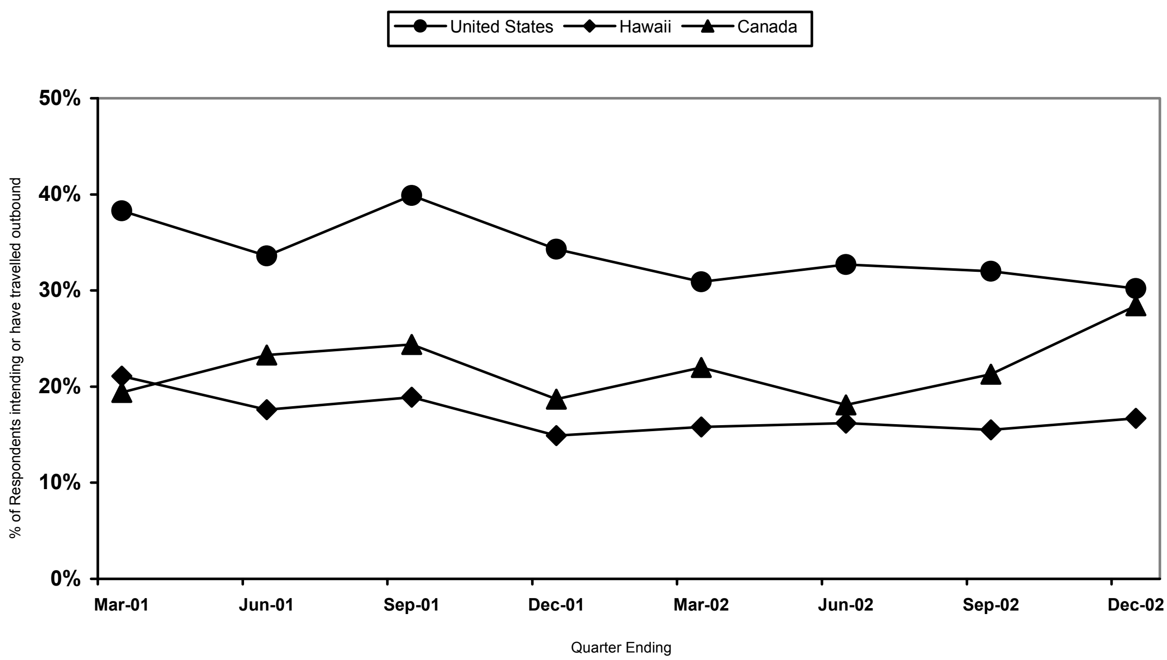


Base: Total intending to travel overseas in the next 3 years and have travelled overseas in last 12 months
Roy Morgan Single Source January 2001 – December 2002 (n=10,899)

3.2 Advertising Awareness – The Americas

Over the second half of 2002, advertising awareness for Canada increased by approximately 10% whilst other American regions remained relatively stable. Awareness of Canada is now at similar levels to the United States, who have not yet recovered their share of mind post September 11. This may be due to reduced international advertising expenditure in line with a reduction in outbound travel by Australians to the USA (often via Hawaii). Consumer focus may be shifting more on to Canada as a result, or alternatively a promotion from Canada (e.g. skiing) may have built awareness.

Figure 5: Prompted Advertising Awareness – The Americas

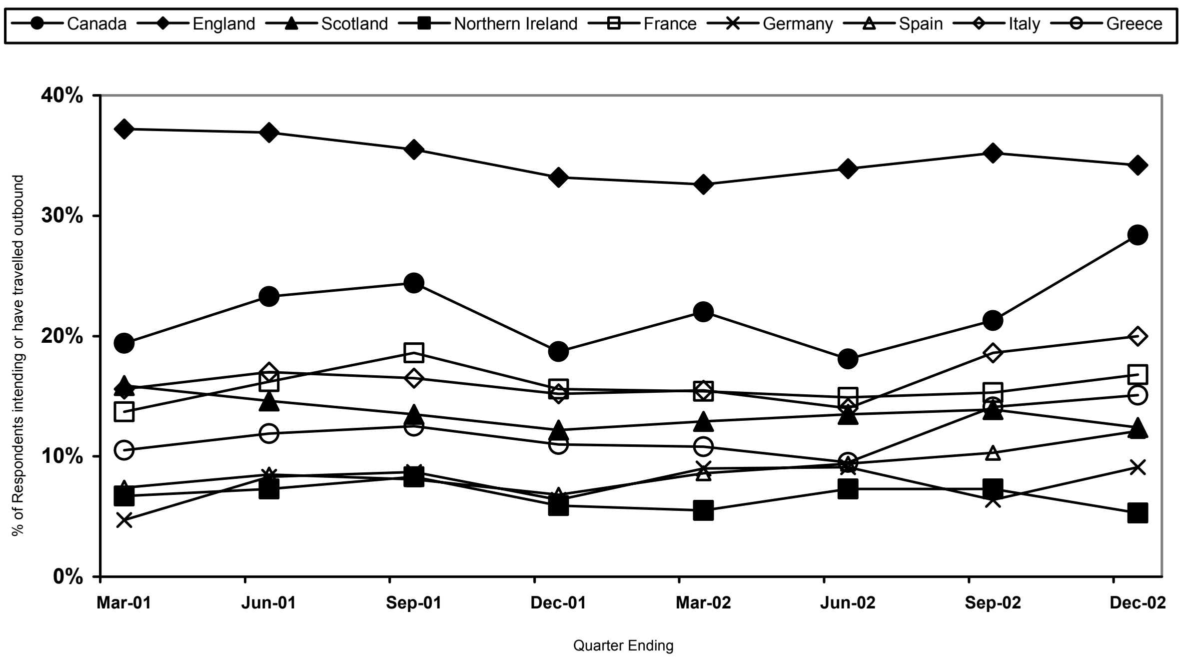


Base: Total intending to travel overseas in the next 3 years or have travelled overseas in the last 12 months
Roy Morgan Single Source January 2001 – December 2002 (n=10,899)

3.3 Advertising Awareness – Canada and European Destinations

When plotted against competing international destinations, the increase in advertising awareness for Canada in the last half of 2002 is stronger than all other measured destinations. Italy has increased across the same time period and all other Countries have remained stable. At the end of 2002, Canada was challenging the leadership position held by England in this measure.

Figure 6: Prompted Advertising Awareness – Canada and European Destinations

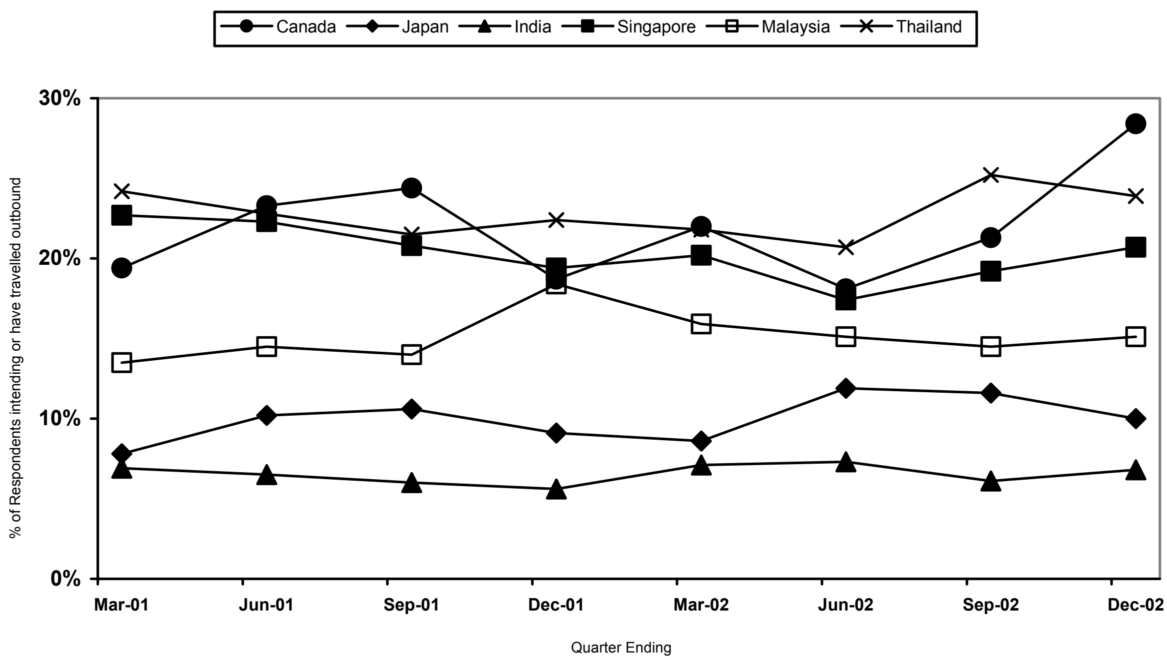


Base: Total intending to travel overseas in the next 3 years or have travelled overseas in the last 12 months
Roy Morgan Single Source January 2001 – December 2002 (n=10,899)

3.4 Advertising Awareness – Canada and Asian Destinations

Awareness of advertising for Canada was stronger at the end of 2002 compared with Asian destinations. It is likely the Bali Bombings detracted attention away from Asian destinations (as did September 11 to the USA). This has not however reduced the level of advertising awareness for Asian destinations, but instead any increase has been minimal, particularly in the last quarter.

Figure 7: Prompted Advertising Awareness – Canada and Asian Destinations

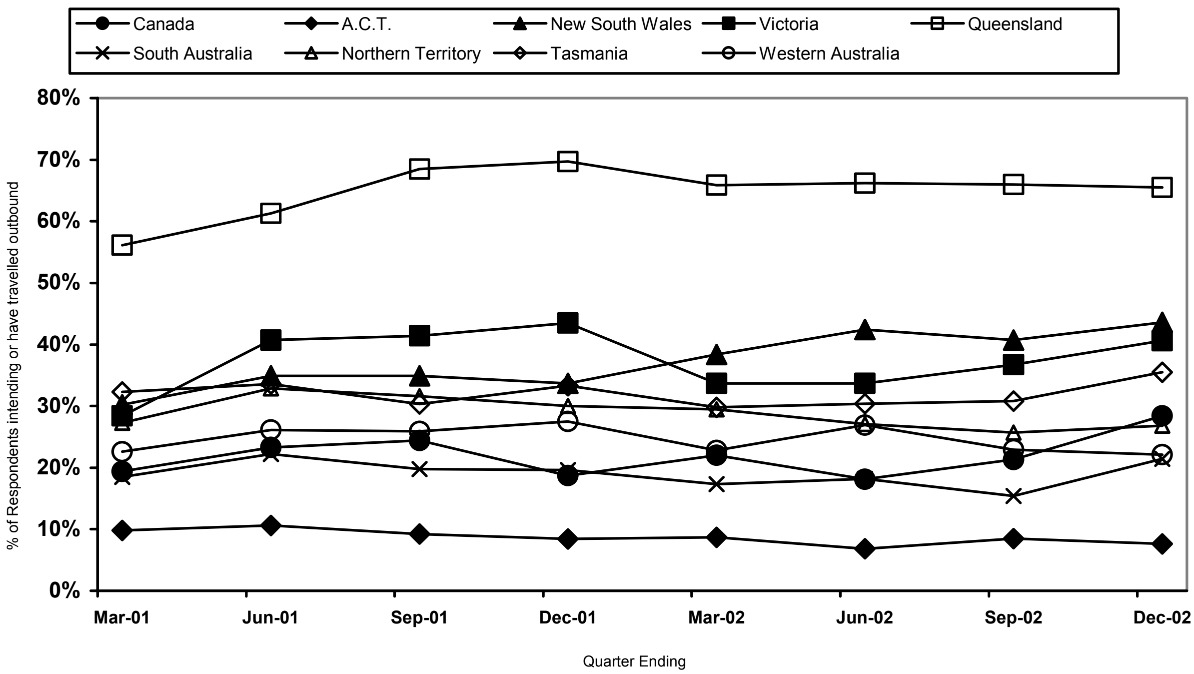


Base: Total intending to travel overseas in the next 3 years and have travelled overseas in the last 12 months
Roy Morgan Single Source January 2001 – December 2002 (n=10.899)

3.5 Advertising Awareness – Domestic Markets

Overall recall of Domestic marketing campaigns is higher given the strong majority of advertising comes from places within Australia. Queensland continues to dominate the other Australian states. Interestingly, awareness for New South Wales has increased over the 12 month period December 01 – 02. New strategies post Olympic Games may be partly driving this increase. As a benchmark for Canada, awareness of advertising was above the levels for ACT, South Australia, Victoria and Northern Territory at the end of 2002.

Figure 8: Prompted Advertising Awareness – Canada and Domestic Destinations



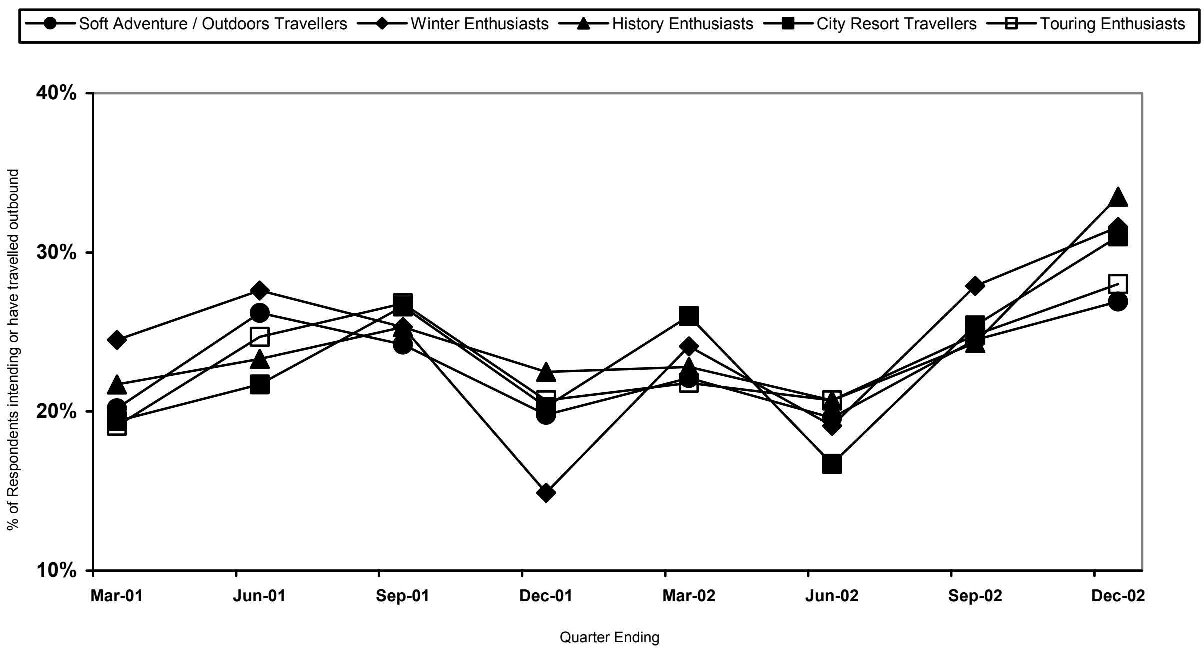
Base: Total intend to travel overseas in the next 3 years and have travelled overseas in the last 12 months
Roy Morgan Single Source January 2001 – December 2002 (n=10,899)

3.6 Advertising Awareness – CTC Segments

(Background to segmentation is detailed in Section 8 of this report).

Winter Enthusiast's prompted awareness for Canada peaked in the June 01 quarter (27.6%) with awareness considerably lower for the December 01 quarter (14.9%). Similarly, Soft Adventure/Outdoors Travellers achieved higher levels of awareness for the June 01 quarter with the lowest figures reported in the December 01 (19.8%) and June 02 (19.6%) quarters. Touring Enthusiasts (26.8%), History Enthusiasts (25.3%) and City Resort Travellers (26.6%) all peaked in the June 02 quarter with the City Resort Travellers again peaking in the March 02 quarter (26%).

Figure 9: Prompted Advertising Awareness – CTC Segments



Base: Total prompted awareness by CTC Segment Roy Morgan Single Source January 2001 – December 2002Min Sample = 2268

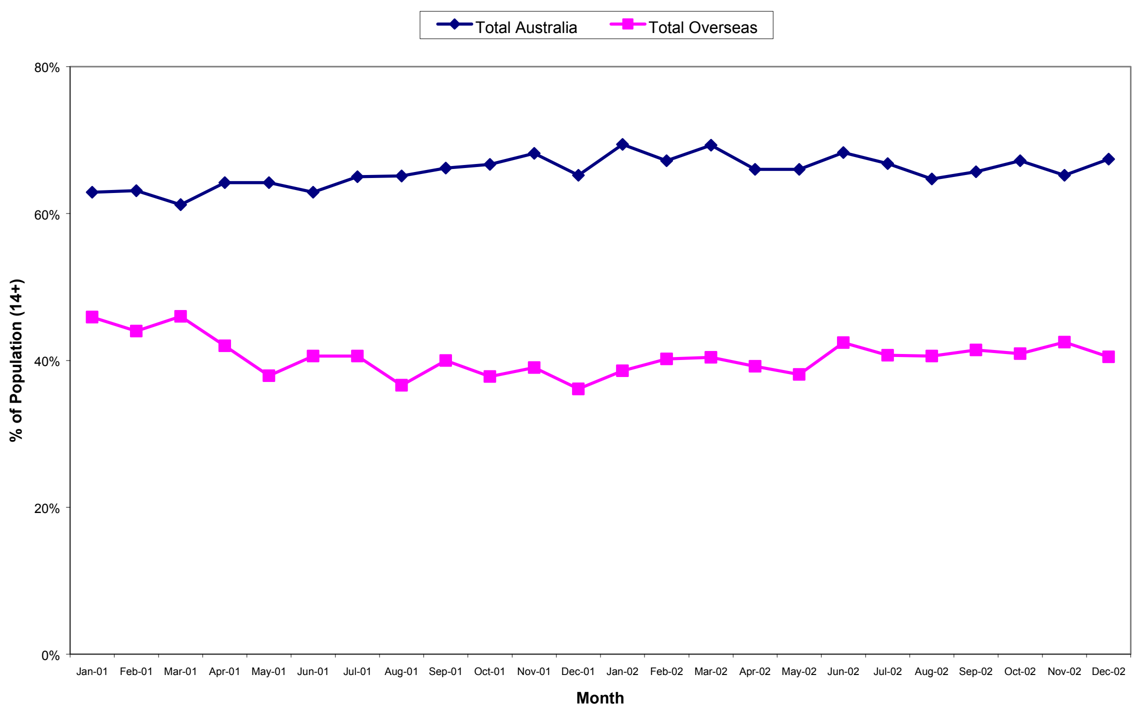
4. Holiday Preferences

This chapter examines holiday preference among Australians for an overseas trip of 3 or more nights.

4.1 Overview of Holiday Preferences

In general, Australians have a stronger preference for domestic destinations versus international, with trend over time indicating a gradual increase for domestic travel of three or more nights. Deregulation and increased competition within the airline industry has given Australians greater access to domestic destinations, and this could have influenced levels of preference domestically.

Figure 10: Preference for Long Haul destination



Base: Australian population Roy Morgan Single Source January 2001 – December 2002 (n=51,919)

4.2 Long Haul Holiday Preferences

Preference for International destinations has generally recovered to pre September 11 levels. The exception is not surprisingly Total America, which at the end of 2002 was still experiencing a lower level of preference against the prior 18 months.

Figure 11: Preference for an Outbound Destination

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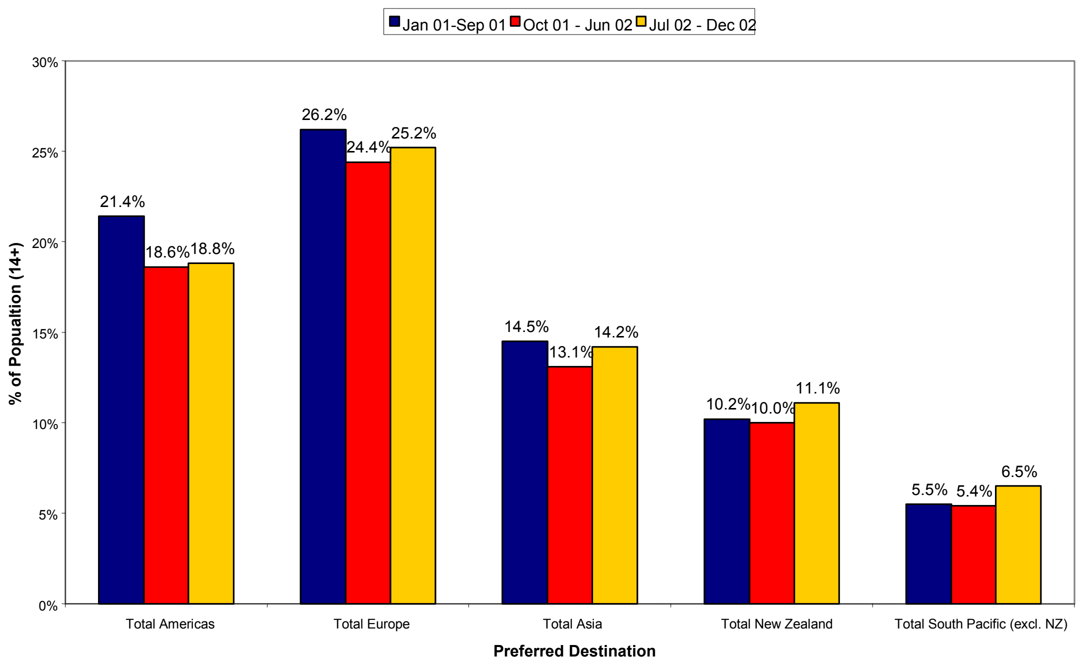
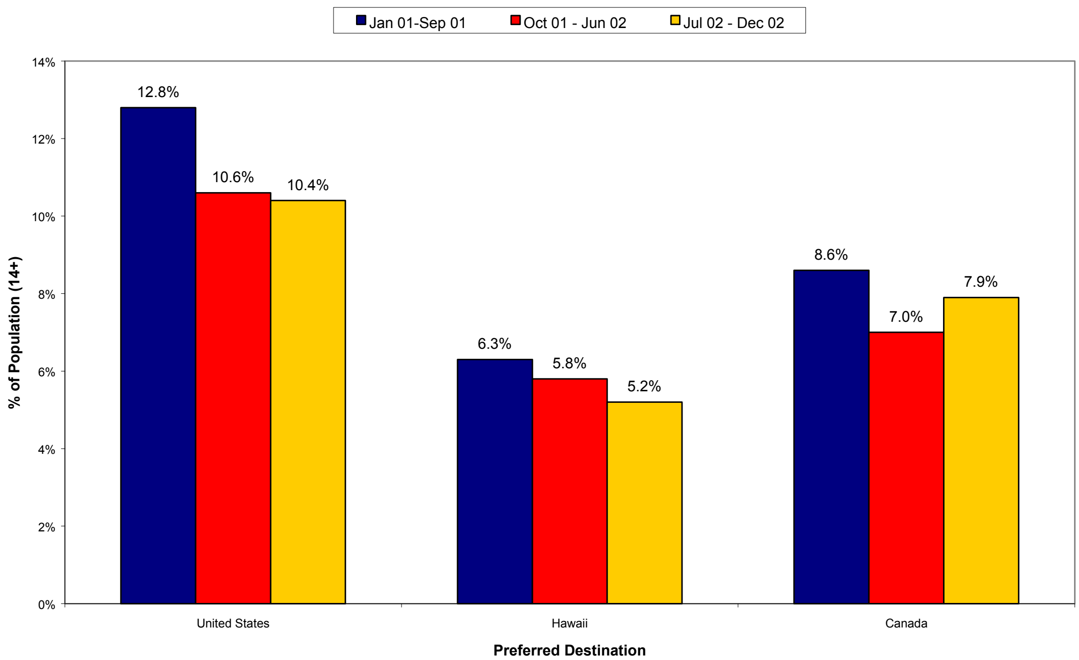


Base: Australian population Roy Morgan Single Source January 2001 – December 2002 (n=51,919)

4.3 Preference for Canada

Non-recovery of preference for Total America is clearly driven by the USA and Hawaii, not Canada. Positively, preference for Canada at the end of 2002 was nearing pre September 11 levels.

Figure 12: Outbound Preference for an American Destination

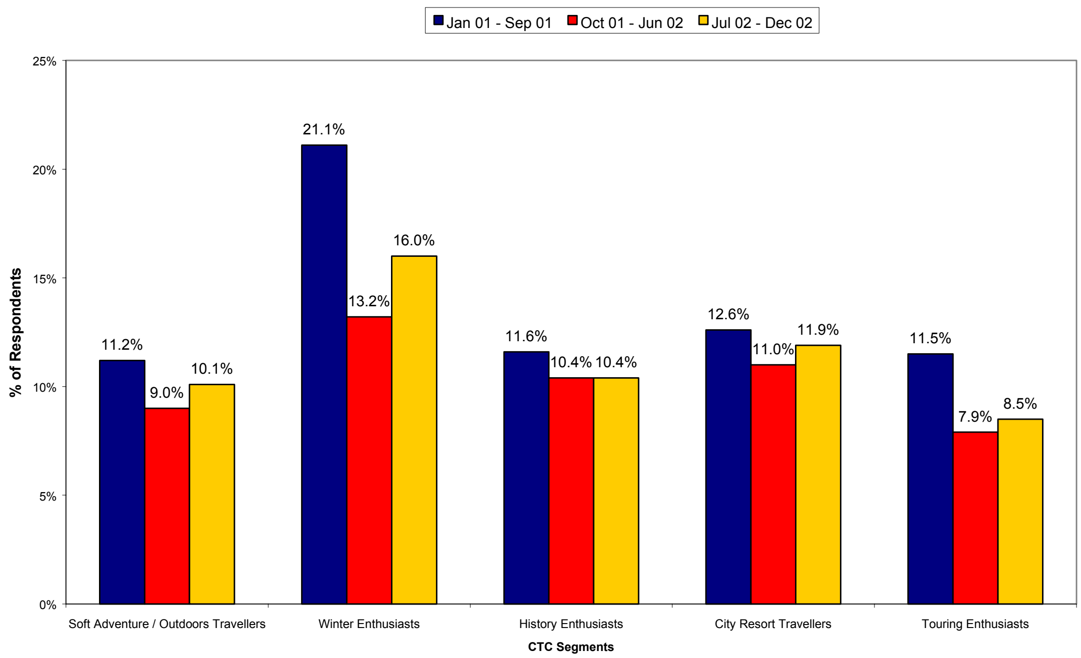


Base: Australian population Roy Morgan Single Source January 2001 – December 2002 (n=51,919)

4.4 Preference for Canada by CTC Segments

Preference profiled by CTC segments indicates market recovery across all segments, in particular the Winter Enthusiast segment whose preference was worst effected by September 11. The exception is History Enthusiasts who have remained stable.

Figure 13: Outbound Preference for Canada – CTC Segments



Base: Total Preferring to visit Canada by CTC Segment
Roy Morgan Single Source January 2001-December 2002

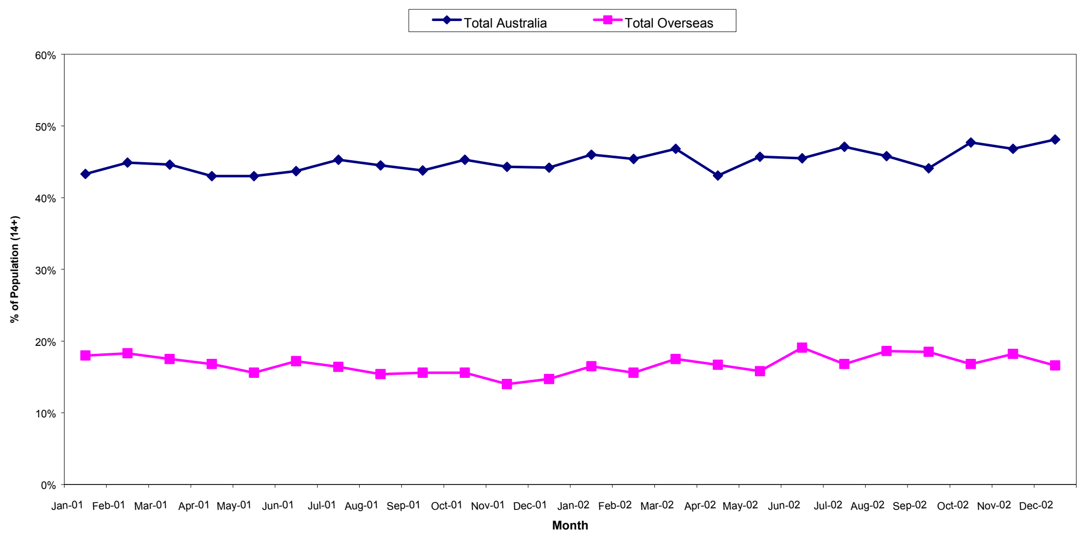
5. Holiday Intentions

This chapter examines holiday intention for long haul travel with an emphasis on length of next trip. Analysis is at both the regional and country-specific level, with particular attention to Canada and key competitor destinations.

5.1 Overview of Holiday Intentions

Over time, intention towards domestic destinations has eroded share from international destinations. This has strengthened in the last half of 2002.

Figure 14: Intention for Long Haul Destination

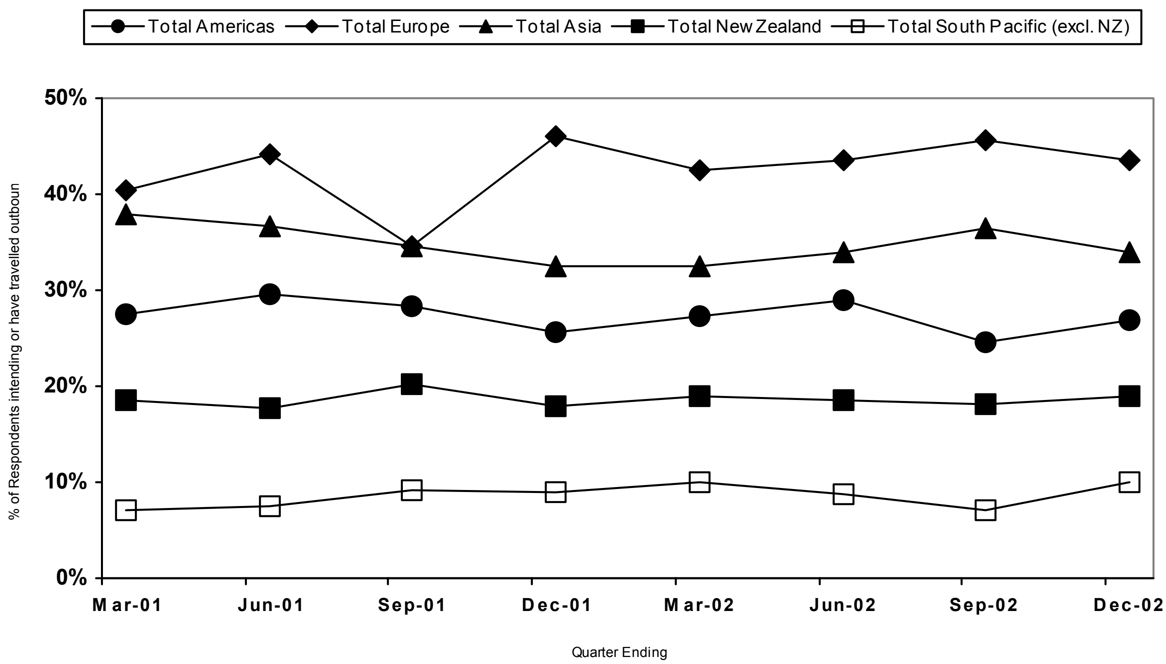


Base: Australian population Roy Morgan Single Source January 2001 – December 2002 (n=51,919)

5.2 Long Haul Holiday Intentions by Regions

Data for overseas intention by region has remained relatively stable. Europe and Asia continue to lead Total America in this measure.

Figure 15: Overseas Intention by Regions



Base: Total intending to travel overseas
Roy Morgan Single Source January 2001 – December 2002 (n=7,384)

5.2.1 Intended Length of Next Trip

The majority of trips are between 8 and 30 days. The most popular length of trip is 8-14 nights, indicating Australians commonly travel for over one week, but not more than two weeks if intending to travel for three or more nights.

Table 1: Intended Length of Outbound Trip

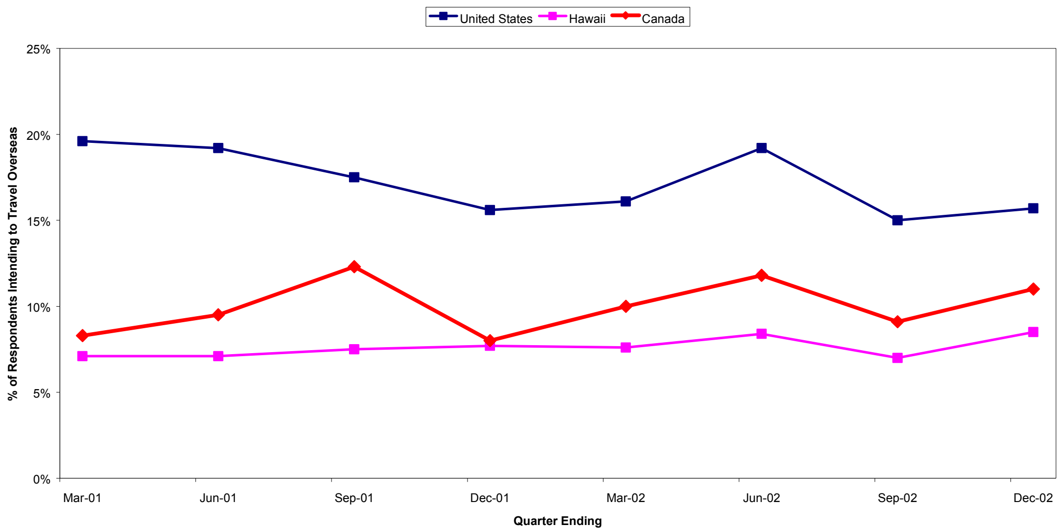
	TOTAL INTENTION
NIGHTS AWAY	
3-5 nights	4.7%
6-7 nights	7.3%
8-14 nights	28.2%
15-21 nights	15.4%
22-30 nights	15.1%
Over 1 month, Less than 2 months	12.0%
Over 2 months, Less than 3 months	1.2%
3 or more months	5.6%
Can’t say	10.6%

Base: Total intending to travel overseas
Roy Morgan Single Source January 2001 – December 2002 (n=7,384)

5.3 Intention for Canada

Similar to preference, intention to travel to the USA for three or more nights has not yet recovered from September 11. Intention for Canada strengthened in the final quarter of 2002, in line with the commencement of the ski season. Overall, the intention gap for Canada and the USA has closed.

Figure 16: Overseas Intention for American Destination



Base: Total intending to travel overseas in the next 3 years
Roy Morgan Single Source January 2001 – December 2002 (n=7,384)

6. Attrition

This chapter examines the attrition of overseas travel.

6.1 Overview and Definitions

Attrition is a derived measure. It is the proportion of respondents who have a preference to a destination but do not intend travelling to that destination on their next trip. The results below are derived from data collected (through Roy Morgan Single Source each year) from approximately 25,000 Australians aged 14 years and over.

6.2 Profile of Long Haul

Total Asia is in the strongest position interms of conversion of preference to intention. 31.8% of Australians who said their preference is to travel to Asia, intend to on their next trip of three or more nights.

Table 2: Attrition of Long Haul Travel Overseas

	Total Americas	Total Europe	Total Asia	Total New Zealand	Total South Pacific (Excl. NZ)
Attrition	80.3%	76.3%	68.2%	75.5%	82.1%

Base: Australian population Roy Morgan Single Source January 2001 – December 2002 (n=51,919)

The USA is in a stronger position against Canada in terms of preferrers intending to travel to the destination on the next long haul trip. This is in line with stronger actual travel to the USA overall.

Table 3: Attrition of Long Haul Travel within the Americas

	United States	Canada	Hawaii
Attrition	79.1%	82.9%	85.4%

Base: Australian population Roy Morgan Single Source January 2001 – December 2002 (n=51,919)

7. Holiday Behaviour

This chapter examines the holiday behaviours among Australians who have travelled overseas in the last 12 months.

7.1 Comparability Between HTS and CATI findings

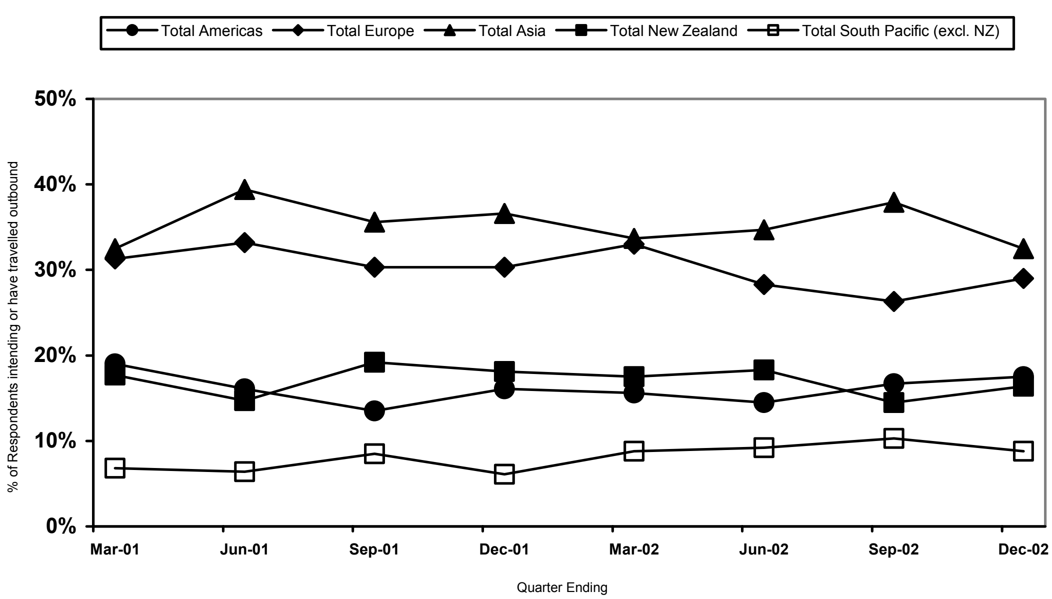
Please note that the survey findings detailed within this report are limited to those obtained from the HTS component of the Australian Consumer Research program. In addition, further quantitative data in relation to long-haul leisure travel was collected using a CATI methodology. The 'Australian Consumer Research – CATI Quantitative Report' provides detailed analysis of the long-haul leisure travel market based on the results of the additional CATI study. Due to differences in scope, sampling, collection methodology and questionnaire content, CATI results are not directly comparable with those presented within this report.

7.2 Long Haul Holiday Behaviour

7.2.1 Places stayed last long haul holiday – Overseas Regions

There is a clear decline in visitation to Asia since June 2001 which is not surprising given the fall of the Australian Dollar and Bali Bombings which both had significant impact on travel to Asia. Europe has also declined in line with poor Australian economic performance. New Zealand and Total South Pacific have inclined slightly, coinciding with reduced travel to Asia and Europe. Positively, Travel to Total America has slowly increased following September 11.

Figure 17: Places stayed last long haul trip by region

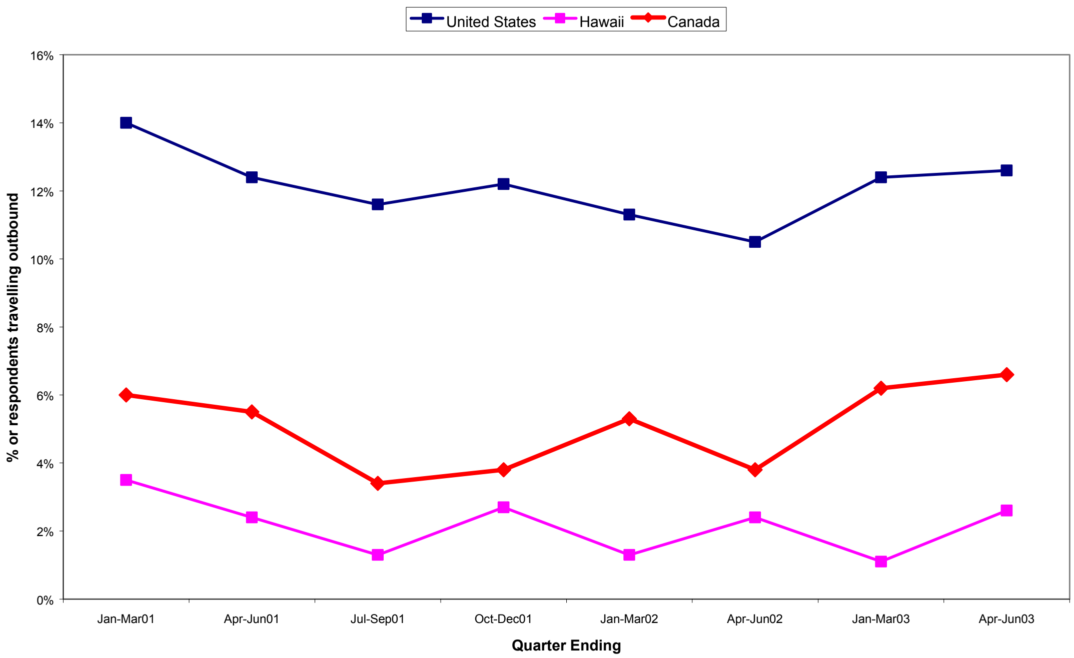


Base: Total travelled overseas in the last 12 months
Roy Morgan Single Source January 2001 – December 2002 (n=5,671)

7.2.2 Places Stayed on Last Long Haul Holiday – The Americas

Figure 18 indicates increased visitation to the United States and in particular Canada, over the last 6 months. This is possibly in light of negative press focussed on different parts of the world sourcing Australian outbound travel during this time. It is likely that consumers 'switch' long haul holiday destinations away from areas of recent or potential threat.

Figure 18: Places stayed last long haul holiday – The Americas



Base: Total travelled overseas in last 12 months
Roy Morgan Single Source Database January 2001 – December 2002 (n=5,671)

7.3 Visitors to Canada

7.3.1 Demographic Profile

Generally speaking, travellers to Canada are demographically consistent with overseas travellers. There are some notable skews however, namely:

- Household structure to more mid-life families, and less singles visiting Canada;
- Higher representation of visitors to Canada in the 'Traditional Family Life' and 'Conventional Family Life' Value Segments;
- Higher proportion of degree-qualified travellers to Canada; and
- Higher proportion of travellers from New South Wales visit Canada versus the overseas travel population, with a lower proportion coming from Western Australia (airline agreements with Australian International Airports will have some influence).

Table 4: Demographic Characteristics of Canada

	CANADA TRAVELLERS	OVERSEAS TRAVELLERS
SEX		
Men	48%	49%
Women	52%	51%
AGE		
14-17	4%	5%
18-24	16%	13%
25-34	19%	22%
35-49	20%	24%
50-64	27%	27%
65 and Over	14%	10%
Average (assuming max age of 75)	**46**	**45**
MARITAL STATUS		
Married/De Facto	57%	61%
Single	43%	39%
SOCIO-ECONOMIC SCALE		
AB Quintile	37%	34%
C Quintile	26%	25%
D Quintile	19%	18%
E Quintile	11%	14%
FG Quintile	7%	9%
Older Households	13%	11%

	Canada Travellers	Overseas Travellers
HOUSEHOLD LIFE-CYCLE		
Young Singles	8%	14%
Young Couples	10%	12%
Young Parents	12%	14%
Mid-Life Families	12%	11%
Mid-Life Households	45%	38%
ROY MORGAN VALUES SEGMENTS*		
Basic Needs	0%	1%
Fairer Deal	0%	3%
Traditional Family Life	19%	16%
Conventional Family Life	9%	6%
'Look At Me'	7%	9%
Something Better	1%	5%
Real Conservatism	3%	3%
Young Optimism	17%	12%
Visible Achievement	23%	23%
Socially Aware	21%	22%
EDUCATION LEVEL		
Primary School	1%	1%
Some Secondary/Tech.	9%	13%
Intermediate/Form 4/Year 10	9%	10%
5th form/Leaving/Year 11	5%	6%
Finished Tech./Matric/HSC/Year 12	13%	15%
Some/ Now at University	10%	13%
Have Diploma or Degree	53%	43%

* Developed in conjunction with Colin Benjamin of The Horizons Network

	CANADA TRAVELLERS	OVERSEAS TRAVELLERS
OCCUPATION		
Professional/Manager	20%	23%
Farm Owner	0%	0%
White Collar Workers	29%	26%
Skilled Workers	10%	7%
Others (incl. Semi/Unskilled)	8%	9%
Home Duties	7%	6%
Don't Work	1%	2%
Looking for Full Time work	3%	2%
Looking for Part Time Work	1%	2%
Retired	17%	14%
Students	5%	8%
REGION		
Capital Cities	76%	78%
Country Areas	24%	22%
STATES		
N.S.W.	49%	39%
Victoria	19%	25%
Queensland	13%	16%
South Australia	8%	5%
Western Australia	6%	13%
Tasmania	2%	1%
BASE	**(N=190)**	**(N=4,052)**

7.4 Holiday Behaviour

The tables below summarise the behaviour of visitors to Canada on their last holiday of 3 or more nights including: transport, accommodation, travel party, information sources, booking methods, spend and duration of trip.

7.4.1 Mode of Transport used

In terms of type of transport used, aeroplane is obviously the major mode. It is clear the 'VFR' (visiting friends and relatives) market is quite strong with a high proportion of travellers using cars/4WDs of friends or relatives. Another popular option is to hire a car/4WD. Overall car/4WD (irrespective of whether it is hired) is the most significant outside of airtravel. Bus/coach travel, train and cruise ship are also used more on average in Canada versus overseas destinations generally.

Table 5: Visited Canada: Transport on last holiday of 3 or more nights

	VISITED CANADA	ALL OVERSEAS TRAVELLERS
MODES OF TRANSPORT USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Aeroplane	84%	80%
Own car or 4WD	10%	10%
Friends/relatives car or 4WD	35%	20%
Hire car or 4WD	32%	25%
Caravan/ Campervan	1%	2%
Bus/ Coach	49%	31%
Train	36%	22%
Cruise ship	15%	7%
Boat/Ferry/Other boat	23%	17%
Motorbike	0%	2%
Bicycle	2%	3%
Some other	5%	6%
Total gave a mode of transport	92%	88%
BASE	**(N=190)**	**(N=4,052)**

7.4.2 Spend and Duration of Trip

Travellers to Canada take longer trips on average versus overseas travellers in general. This is reflected in a higher total spend per capita on a trip to Canada. If the total number of nights away is examined versus all overseas travellers, it is clear trips to Canada are generally in excess of three weeks, and expenditure is higher (note this includes airfares). It is important to note that average nights spent in Canada is heavily influenced by those travelling for 3 or more months (Visa agreements will influence this figure also).

Table 6: Visited Canada: Spend and duration on last holiday of 3 or more nights

	VISITED CANADA	ALL OVERSEAS TRAVELLERS
TOTAL NUMBER OF NIGHTS AWAY ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average (Nights)	56	29
TOTAL NIGHTS		
3-7 nights	4%	11%
8-14 nights	7%	27%
15-21 nights	10%	15%
22-30 nights	31%	15%
Over 1 month, less than 2 months	25%	15%
Over 2 months, less than 3 months	3%	3%
3 or more months	18%	5%
AVERAGE SPEND PER PERSON TOTAL TRIP		
Average	$7,200	$3,826
TOTAL AVERAGE SPEND PER PERSON BY LENGTH OF TRIP		
3-7 nights	$908	$1,463
8-14 nights	$3,527	$2,439
15-21 nights	$4,761	$3,424
22-30 nights	$6,849	$4,797
Over 1 month, less than 2 months	$7,745	$5,942
Over 2 months, less than 3 months	$5,622	$6,968
3 or more months	$11,865	$8,005
SPEND PER PERSON PER NIGHT ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average	$208	$188
BASE	**(N=190)**	**(N=4,502)**

7.4.3 Accommodation

The source of accommodation for the majority of Australian travellers to Canada is friends/relatives homes (reflected in transport used on the previous page). The backpacker / youth hostel market is also strong in Canada (not surprising given length of stay data) as is B&B and hosted farm accommodation.

Table 7: Visited Canada: Accommodation on last holiday of 3 or more nights

	VISITED CANADA	ALL OOVERSEAS TRAVELLERS
TYPES OF ACCOMMODATION USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Own holiday house, flat	1%	4%
Friends/Relatives home	58%	44%
Rented fully self-contained flat, unit, etc	7%	7%
Rented serviced apartment	9%	4%
Rented house	0%	2%
Luxury hotel or resort: 5 star	15%	15%
4 star hotel or resort	25%	25%
Standard hotel/motel or resort	33%	30%
Bed & Breakfast, Host farm	15%	9%
Youth hostel or backpackers	12%	7%
Caravan	0%	1%
Tent/camping	7%	2%
Cabin	0%	3%
Boat/House-boat/Ship	7%	5%
Some other	6%	3%
Total gave a type of accommodation used on last long trip	92%	91%
BASE	**(N=190)**	**(N=4,052)**

7.4.4 Information Sources

When choosing their holiday destination, almost two-thirds of Australian travellers to Canada relied heavily on Travel Agents (64%). Friends or relatives who live in Canada were used as an information source by almost twice as many travellers against all overseas destinations, pointing to 'word of mouth' as a significant influencer of destination choice. Travel books / guide books, and the Internet were also used by at least one-fifth of travellers.

Table 8: Visited Canada: Information sources on last holiday of 3 or more nights

	VISITED CANADA	ALL OVERSEAS TRAVELLERS
PLACES WHICH HELPED IN CHOOSING LAST HOLIDAY DESTINATION OF 3 OR MORE NIGHTS		
Travel Agent	64%	53%
Airline	5%	8%
State Tourism Authority/ Government Travel Centre	1%	2%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	3%	2%
Tour Operator	3%	5%
TV advertising	3%	1%
TV program (eg.Lifestyle or Travel show)	3%	3%
Radio advertising	0%	0%
Radio program	0%	0%
Total TV or Radio	5%	4%
Newspaper advertising	3%	5%
Newspaper articles	3%	3%
Magazine advertising	-	1%
Magazine articles	4%	3%
Brochures	19%	17%
Travel or guide books	24%	22%
Friends or relatives who had visited the destination	23%	17%
Friends or relatives who live at the destination	33%	18%
I had been there before	19%	18%
Internet	21%	17%
BASE	**(N=130)**	**(N=3,073)**

	Visited Canada	All Overseas Travellers
PLACES WHICH HELPED IN CHOOSING LAST HOLIDAY DESTINATION OF 3 OR MORE NIGHTS (CONTINUED)		
Loyalty programme	1%	2%
Some other	4%	4%
Total had help in choosing destination of last long trip	89%	83%
I did not obtain any information	4%	10%
Base	**(n=190)**	**(n=4,052)**

7.4.5 Booking Method

Over three-quarters (79%) of Travellers to Canada used a Travel Agent to book their holiday. The Internet is utilised, and a significant group of travellers exist who are happy to book travel arrangements themselves.

Table 9: Visited Canada: Booking methods on last holiday of 3 or more nights

	VISITED CANADA	ALL OVERSEAS TRAVELLERS
HOW LAST HOLIDAY OF 3 OR MORE NIGHTS WAS BOOKED		
Travel Agent	79%	71%
Airline	7%	12%
Tour Operator	4%	4%
State Tourism Authority/ Government Travel Centre	2%	0%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	0%	1%
Shipping Line	1%	0%
Internet	14%	11%
Booked accommodation directly	13%	10%
Booked hire car directly	9%	6%
Booked other travel directly	9%	4%
Some other	3%	4%
Can't say method used	-	0%
Total booked last long trip	89%	89%
I did not book my last trip	5%	4%
BASE	**(N=190)**	**(N=4,052)**

7.4.6 Activities Done on last Trip

Canada's positioning as a world skiing destination is evident as indicated by a high proportion engaging in snow sports on their last trip to Canada. 'VFR' was also popular, consistent with other measures. There was also skews to cultural activities undertaken, as well as environmental activities versus other destinations travelled to. Canada is not seen as a 'rest and relaxation' destination (versus total overseas destinations) despite the popularity of cultural and environmental activities.

Table 10: Visited Canada: Activities on last holiday of 3 or more nights

	VISITED CANADA	ALLOVERSEAS TRAVELLERS
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Visiting friends or relatives	$\boxed{61\%}$	52%
Shopping	52%	53%
Restaurants/ international food/ wine	45%	44%
Cinema/ movies	13%	10%
Musical performances/ concerts	10%	11%
Theatre going	4%	5%
Disco/ nightlife	8%	11%
Visited a Casino	$\boxed{11\%}$	6%
Played poker machines	$\boxed{9\%}$	4%
Informal cards eg. Bridge,Poker,etc	1%	2%
Video Arcade eg. Timezone,Laserforce	1%	2%
Other social activities	41%	40%
Horse racing eg. Melbourne Cup	1%	0%
Football/ Rugby/ Cricket eg. Football Final, Rugby Test	2%	2%
Motor racing eg. Grand Prix, Indy, Bathurst	3%	0%
Other spectator sporting events eg. Golf,Tennis	4%	1%
Arts Festival, Cultural Event	5%	6%
Exhibition, Show eg. Home, Motor, Air	3%	2%
Special interest meetings eg. Sporting Club	2%	1%
Other special events	$\boxed{17\%}$	11%
Tennis/ squash	1%	2%
Golf	2%	4%
Snow Skiing,Snowboarding	$\boxed{16\%}$	3%
Horse riding/ trail riding	1%	1%
Bike riding	6%	3%

	Visited Canada	All Overseas Travellers
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS (CONTINUED)		
Playing Other sports	1%	2%
Fishing/ hunting	5%	2%
Bushwalking	15%	11%
Surfing/ swimming	11%	20%
Sailing	1%	2%
Water Skiing	2%	1%
Other adventure activities eg. Rock Climbing, Bungee jumping	4%	5%
Other outdoor activities	16%	19%
Museums	43%	35%
Art Galleries	33%	23%
Theme/ entertainment parks	27%	12%
Gardens/ Parks	42%	28%
Zoo/ sanctuary/ animal parks	23%	14%
Historical places	51%	44%
Wineries/ vineyards	14%	9%
Country/ wildlife/ scenery	42%	32%
Cities	56%	48%
Wilderness	22%	13%
National parks,Forests	51%	24%
Other sightseeing	46%	45%
Rest & relaxation	40%	53%
Meet & mix with other people	39%	34%
Beach holiday	5%	14%
Cruise on a ship	11%	6%
Luxurious/ comfortable holiday	13%	13%
Package tour	12%	6%
Backpacking	8%	5%
Nature holiday eg. Camping	4%	3%
Living with or experiencing local culture	19%	23%
A real ecotourism experience	3%	2%
Health resort/spa holiday	-	1%
Other particular holiday experience	29%	19%
Total gave a type of activity	92%	94%
Base	**(n=190)**	**(n=4,052)**

8. Australian Market Segmentation

This chapter examines the five key market segments identified by the Canadian Tourism Commission.

8.1 Overview

The Canadian Tourism Commission has identified five key market segments.

Soft Adventure was the largest segment with 2.2 million people, followed by Touring Enthusiasts (1.8 million), City Resort Travellers (1.7 million), History Enthusiasts (1.6 million) and Winter Enthusiasts (870,000).

Of the 10.9 million Australians aged 14 or over who travelled on a holiday or leisure trip of 3 or more nights in the last 12 months, 24% do not fit into any of the CTC segments. (NB. The CTC segment definitions are not mutually exclusive).

Each segment is discussed in detail below.

8.2 Soft Adventure Segment

There are 2.2 million people within the Soft Adventure segment. They tend to be young, well educated and working in either professional or white-collar occupations. They are an active and socially aware group with liberal-minded attitudes.

Key attitudinal differentiators include a strong orientation towards family and friends, and a pull towards nature-based tourism.

Compared to all travellers, the Soft Adventure segment are more likely to read national newspapers and business, financial or airline magazines and access the Internet at least monthly.

Potential to re-visit Canada is above average in terms of preference, but next trip intention is low. This indicates that the interval between trips to Canada may be quite long.

Expenditure among this segment is quite conservative, due to utilisation of friends and relatives whilst in Canada. Furthermore, they are more likely to use caravan and camping styles of accommodation if not staying with friends and relatives. Whilst on holiday, activities are centred around the outdoors as well as socialising with friends and relatives.

8.2.1 Demographic Profile

Compared with all travellers, the Soft Adventure Segment is skewed to 25-49yrs compared to all travellers. They tend to be well-educated and working in professional or white-collar occupations. This is reflected in a high representation in the 'AB' socio-economic quintile (as indicated though high relative education, income and occupation levels).

Table 11: Demographic Characteristics of the Soft Adventure Segment

	SOFT ADVENTURE	ALL TRAVELLERS
SEX		
Men	55%	48%
Women	45%	52%
AGE		
14-17	8%	6%
18-24	12%	12%
25-34	22%	20%
35-49	31%	28%
50-64	20%	23%
65 and Over	7%	11%
MARITAL STATUS		
Married/De Facto	64%	65%
Single	36%	35%
SOCIO-ECONOMIC SCALE		
AB Quintile	30%	24%
C Quintile	24%	22%
D Quintile	20%	20%
E Quintile	16%	18%
FG Quintile	11%	15%
HOUSEHOLD LIFE-CYCLE		
Young Singles	12%	11%
Young Couples	10%	8%
Young Parents	27%	25%
Mid-Life Families	14%	12%
Mid-Life Households	28%	31%
Older Households	8%	13%

	SOFT ADVENTURE	ALL TRAVELLERS
ROY MORGAN VALUES SEGMENTS*		
Basic Needs	1%	2%
Fairer Deal	4%	4%
Traditional Family Life	13%	19%
Conventional Family Life	8%	8%
'Look At Me'	12%	11%
Something Better	7%	7%
Real Conservatism	3%	4%
Young Optimism	9%	9%
Visible Achievement	21%	20%
Socially Aware	21%	16%
EDUCATION LEVEL		
Primary School	1%	2%
Some Secondary/Tech.	14%	17%
Intermediate/Form 4/Year 10	11%	14%
5th form/Leaving/Year 11	6%	7%
Finished Tech./Matric/HSC/Year 12	19%	18%
Some/ Now at University	11%	11%
Have Diploma or Degree	37%	31%
OCCUPATION		
Professional/Manager	20%	17%
Farm Owner	1%	1%
White Collar Workers	25%	25%
Skilled Workers	9%	7%
Others (incl. Semi/Unskilled)	12%	12%
Home Duties	6%	9%
Don't Work	2%	2%
Looking for Full Time work	3%	3%
Looking for Part Time Work	2%	2%
Retired	12%	15%
Students	8%	7%

* Developed in conjunction with Colin Benjamin of The Horizons Network

	Soft adventure	All travellers
REGION		
Capital Cities	64%	63%
Country Areas	36%	37%
STATES		
N.S.W.	35%	36%
Victoria	24%	26%
Queensland	19%	18%
South Australia	8%	8%
Western Australia	11%	10%
Tasmania	2%	2%
HOUSEHOLD INCOME		
Average per annum	CAD$62,227	CAD$57,321
Base	**(n=6,676)**	**(n=35,643)**

8.2.2 Attitudinal Profile

Compared to all travellers, the Soft Adventure Segment is active and seeking a nature-based travel experience. They are oriented towards family and friends, and away from crowds.

Table 12: Holiday Attitudes of the Soft Adventure Segment

	SOFT ADVENTURE	ALL TRAVELLERS
HOLIDAY ATTITUDES		
More likely to agree:		
For my next holiday, I'd really like a total ecotourism experience	26%	19%
I'm always very active on holidays	59%	46%
I prefer to holiday where I can see nature or be in a natural setting	89%	73%
I like to go away on weekends	66%	57%
I avoid staying at accommodation that does not have genuine environmental policies	19%	17%
I sometimes organise holidays on behalf of my family and friends	32%	27%
I like to take my holidays away from crowds	83%	73%
I'd like to holiday where I can experience the local culture	75%	70%
I like to take holidays within Australia	91%	87%
I usually book and arrange all my holiday travel details myself	68%	64%
Less likely to agree:		
I usually leave holiday arrangements to someone else	20%	21%
On holidays I like to do as little as possible	34%	45%
I enjoy holidays where everything is organised for you	17%	23%
It only feels like a holiday if I leave Australia	3%	5%
I prefer the bright lights and big cities when I travel	8%	15%
BASE	**(N=6,676)**	**(N=35,643)**

The Soft Adventure segment is generally more positive in their opinions, many of which point to active, social and liberal-minded sorts of attitudes.

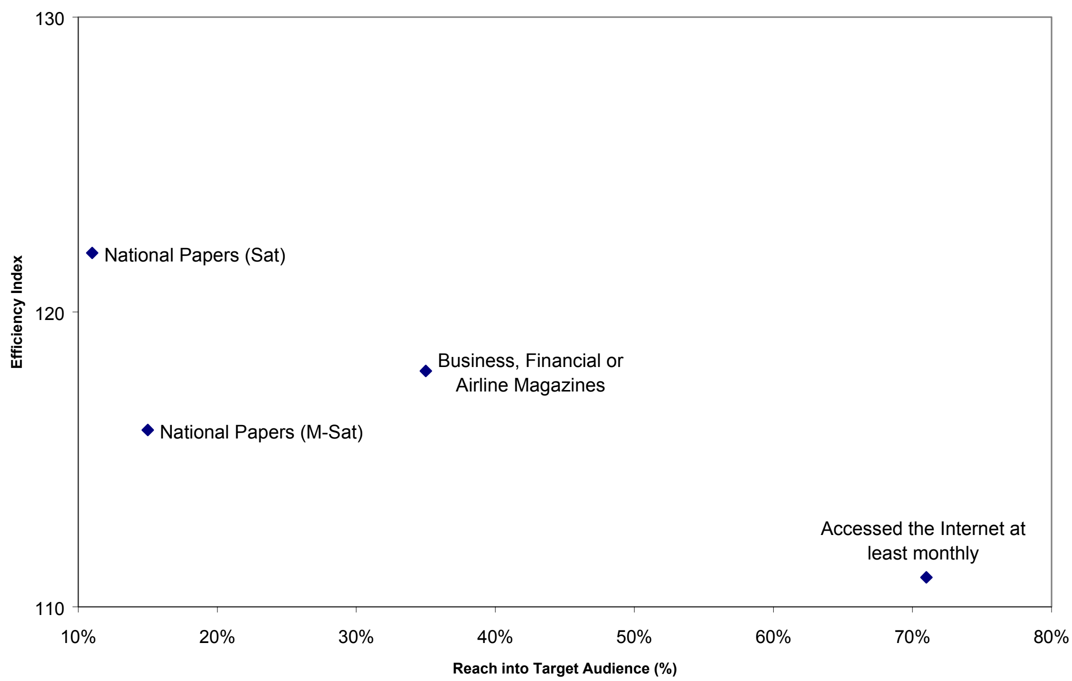
Table 13: Distinctive Attitudes of the Soft Adventure Segment

	SOFT ADVENTURE	ALL TRAVELLERS
ATTITUDES		
At least 10% more likely to agree:		
I believe in taking risks	60%	39%
It is important to have a full social life	55%	39%
I like tough physical activity	51%	33%
I look for new experiences every day	51%	38%
Homosexual couples should be allowed to adopt children	49%	36%
I'm a bit of an intellectual	45%	34%
I love to do as many sports as possible	42%	26%
Computers and technology give me more control over my life	42%	27%
Terrorists deserve the same rights as other criminals	42%	32%
I like to be with a crowd of people	41%	29%
I will buy a product because of the label	31%	23%
I sometimes use force to get things done	31%	24%
Freedom is more important than the law	27%	19%
I wear clothes that will get me noticed	26%	15%
I'm more interested in my job than my house	24%	18%
I choose a car mainly on its looks	24%	19%
BASE	**(N=6,676)**	**(N=35,643)**

8.2.3 Media Usage

Compared to all travellers, the Soft Adventure segment are more likely to read national newspapers and business, financial or airline magazines, and access the Internet at least monthly. In terms of reaching the audience, the internet and industry magazines is the most targeted approach.

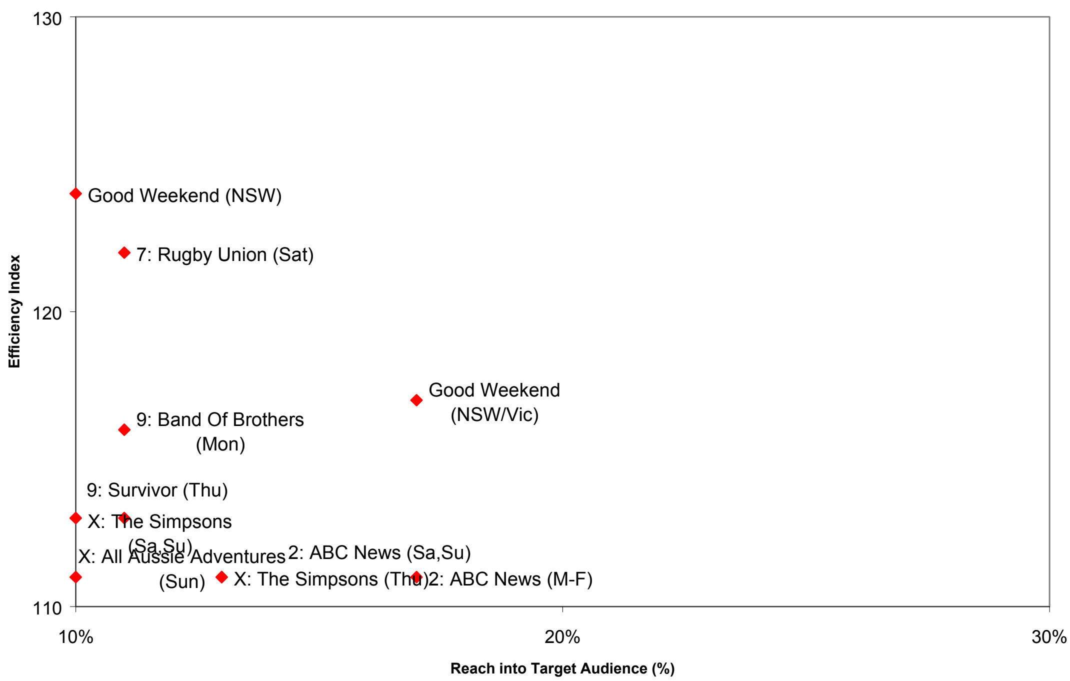
Figure 19: High-Efficiency, High-Reach Media Types for the Soft Adventure Segment



Base: All travellers (n=29,053)
See Appendix (p.119) for an explanation on how to interpret this graph

From the general media types highlighted on the previous page, the chart below shows the specific publications and programs that are more likely to reach the Soft Adventure Segment versus other travellers.

Figure 20: High-Efficiency, High-Reach Publications and Programs for the Soft Adventure Segment



Base: All travellers (n=29,053)
See Appendix (p.119) for an explanation on how to interpret this graph

8.2.4 Marketing Funnel

In terms of the key 'Marketing Funnel' indicators for Canada, the Soft Adventure segment performed very similarly to travellers generally. Revisitation to Canada is certainly preferred, but not necessarily followed-through as shown by next trip intention. This indicates that Canada is not necessarily a frequently visited destination.

Table 14: Marketing Funnel for the Soft Adventure segment

	SOFT ADVENTURE	ALL TRAVELLERS
MARKETING FUNNEL FOR CANADA		
Awareness	23%	20%
Preference	10%	9%
Intention	2%	2%
Visitation	2%	1%
Attrition*	82%	83%
Re-visit potential: Preference**	$\boxed{38\%}$	32%
Re-visit potential: Intention***	12%	15%
BASE	**(N=6,676)**	**(N=35,643)**

* *Among those who would like to visit Canada in the next 2 years (ie Preferrers), the percentage who do* <u>*not*</u> intend *visiting on their next trip.*

** *Among those who have visited Canada in the last 12 months, the percentage who would like to visit again in the next 2 years.*

*** *Among those who have visited Canada in the last 12 months, the percentage who intend visiting on their next trip.*

8.2.5 Competitive Context

Canada was the 4th most preferred destination for the Soft Adventure segment, after United Kingdom, New Zealand and the United States.

Table 15: Top 20 Preferred Overseas Destinations for the Soft Adventure segment

	SOFT ADVENTURE
PREFERRED OVERSEAS DESTINATIONS	
United Kingdom	16%
New Zealand	15%
United States	12%
Canada	10%
Italy	9%
France	9%
Scotland	7%
Hawaii	6%
Bali	6%
Fiji	5%
Republic of Ireland	5%
Mexico, Central America, South America	5%
Greece	5%
Thailand	5%
Scandinavia, Finland, Sweden, Denmark, Norway	5%
Spain/ Portugal	4%
Switzerland/ Austria	4%
Other South Pacific	4%
Germany	4%
Egypt	4%
BASE	**(N=6,676)**

8.2.6 Holiday Behaviour

The tables below summarise the behaviour of the Soft Adventure segment on their last holiday of 3 or more nights including: transport, accommodation, travel party, information sources, booking methods, spend and duration of trip.

Table 16A: Soft Adventure segment: Transport on last holiday of 3 or more nights

	SOFT ADVENTURE	ALL TRAVELLERS
TOTAL NUMBER OF NIGHTS AWAY ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average (Nights)	16	14
SPEND PER PERSON PER NIGHT ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average	$93	$100
MODES OF TRANSPORT USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Aeroplane	30%	33%
Own car or 4WD	58%	48%
Friends/relatives car or 4WD	17%	15%
Hire car or 4WD	12%	10%
Caravan/ Campervan	6%	4%
Bus/ Coach	15%	14%
Train	11%	11%
Cruise ship	2%	2%
Boat/Ferry/Other boat	13%	8%
Motorbike	1%	1%
Bicycle	3%	1%
Some other	4%	3%
Total gave a mode of transport	94%	88%
BASE	**(N=6,676)**	**(N=29,053)**

Table 16B: Soft Adventure segment: Accommodation on last holiday of 3 or more nights

	SOFT ADVENTURE	ALL TRAVELLERS
TYPES OF ACCOMMODATION USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Own holiday house, flat	5%	4%
Friends/Relatives home	36%	40%
Rented fully self-contained flat, unit, etc	14%	12%
Rented serviced apartment	4%	4%
Rented house	4%	3%
Luxury hotel or resort: 5 star	6%	6%
4 star hotel or resort	11%	11%
Standard hotel/motel or resort	18%	16%
Bed & Breakfast, Host farm	5%	3%
Youth hostel or backpackers	5%	2%
Caravan	10%	6%
Tent/camping	15%	7%
Cabin	9%	6%
Boat/House-boat/Ship	3%	2%
Some other	3%	2%
Total gave a type of accommodation used on last long trip	96%	89%
BASE	**(N=6,676)**	**(N=29,053)**

Table 16C: Soft Adventure segment: Information sources on last holiday of 3 or more nights

	SOFT ADVENTURE	ALL TRAVELLERS
PLACES WHICH HELPED IN CHOOSING LAST HOLIDAY DESTINATION OF 3 OR MORE NIGHTS		
Travel Agent	18%	18%
Airline	4%	4%
State Tourism Authority/ Government Travel Centre	8%	5%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	10%	8%
Tour Operator	2%	2%
TV advertising	1%	1%
TV program (eg.Lifestyle or Travel show)	3%	2%
Newspaper advertising	3%	3%
Newspaper articles	2%	1%
Magazine advertising	2%	1%
Magazine articles	2%	1%
Brochures	15%	10%
Travel or guide books	15%	10%
Friends or relatives who had visited the destination	18%	12%
Friends or relatives who live at the destination	15%	14%
I had been there before	27%	20%
Internet	12%	10%
Loyalty programme	1%	1%
Some other	6%	4%
Total had help in choosing destination of last long trip	77%	67%
I did not obtain any information	21%	21%
BASE	**(N=6,676)**	**(N=29,053)**

Table 16D: Soft Adventure segment: Booking methods on last holiday of 3 or more nights

	SOFT ADVENTURE	ALL TRAVELLERS
HOW LAST HOLIDAY OF 3 OR MORE NIGHTS WAS BOOKED		
Travel Agent	21%	23%
Airline	8%	9%
Tour Operator	2%	2%
State Tourism Authority/ Government Travel Centre	2%	2%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	1%	1%
Shipping Line	1%	0%
Internet	7%	8%
Booked accommodation directly	31%	24%
Booked hire car directly	4%	3%
Booked other travel directly	4%	3%
Some other	7%	6%
Can't say method used	0%	1%
Total booked last long trip	67%	63%
I did not book my last trip	32%	26%
BASE	**(N=6,676)**	**(N=29,053)**

Table16E: Soft Adventure segment: Activities on last holiday of 3 or more nights

	SOFT ADVENTURE	ALL TRAVELLERS
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Visiting friends or relatives	47%	49%
Shopping	36%	36%
Restaurants/ international food/ wine	32%	28%
Cinema/ movies	12%	10%
Musical performances/ concerts	5%	4%
Theatre going	2%	2%
Disco/ nightlife	7%	5%
Visited a Casino	5%	5%
Played poker machines	6%	7%
Informal cards eg. Bridge,Poker,etc	4%	2%
Video Arcade eg. Timezone,Laserforce	2%	2%
Other social activities	56%	42%
Horse racing eg. Melbourne Cup	1%	1%
Football/ Rugby/ Cricket eg. Football Final, Rugby Test	2%	1%
Motor racing eg. Grand Prix, Indy, Bathurst	1%	1%
Other spectator sporting events eg. Golf,Tennis	1%	1%
Arts Festival, Cultural Event	4%	3%
Exhibition, Show eg. Home, Motor, Air	2%	2%
Special interest meetings eg. Sporting Club	2%	2%
Other special events	13%	10%
Tennis/ squash	5%	3%
Golf	6%	4%
Snow Skiing,Snowboarding	2%	2%
Bike riding	7%	3%
Horse riding/ trail riding	4%	1%
Playing Other sports	3%	2%
Fishing/ hunting	29%	10%
Bushwalking	35%	14%
Surfing/ swimming	38%	25%
Sailing	3%	2%
BASE	**(N=6,676)**	**(N=29,053)**

	SOFT ADVENTURE	ALL TRAVELLERS
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS (CONTINUED)		
Water Skiing	3%	1%
Other adventure activities eg. Rock Climbing, Bungee jumping	5%	2%
Other outdoor activities	31%	17%
Museums	20%	15%
Art Galleries	14%	10%
Theme/ entertainment parks eg. Disneyland, Sovereign Hill, Movie World, Dream World, Luna Park	10%	9%
Gardens/ Parks	24%	18%
Zoo/ sanctuary/ animal parks	15%	11%
Historical places	31%	21%
Wineries/ vineyards	13%	9%
Country/ wildlife/ scenery	45%	23%
Wilderness	24%	10%
National parks,Forests	46%	23%
Cities	24%	20%
Other sightseeing	38%	30%
Rest & relaxation	68%	57%
Meet & mix with other people	29%	25%
Beach holiday	32%	22%
Cruise on a ship	3%	2%
Luxurious/ comfortable holiday	8%	7%
Package tour	2%	2%
Backpacking	4%	2%
Nature holiday eg. camping	13%	5%
Living with or experiencing local culture	10%	6%
A real ecotourism experience	3%	1%
Health resort/spa holiday	1%	1%
Other particular holiday experience	18%	13%
Total gave a type of activity	100%	91%
BASE	**(N=6,676)**	**(N=29,053)**

8.3 Winter Enthusiast Segment

There are 870,000 people within the Winter Enthusiast segment. They tend to be young, well educated and one third do not have children as yet. A high level of household income exists within this segment, reflected in discretionary expenditure on weekends away, clothing, food and wine, sporting activities and technology.

Compared to all travellers, the Winter Enthusiast segment are more likely to read the national newspapers and a range of magazine types including Music, Women's Fashion, Men's Lifestyle, Computing and Business Financial or Airline magazines. They are also more likely to have been to the cinema, watch SBS and Sci-Fi, Entertainment and Comedy programs on TV and access the Internet at least monthly.

Over half of this segment are preferrers of Canada for a holiday destination. Similar to other segments, they are not likely to visit on their next trip, indicating time between visits is long.

Whilst on holiday, activities undertaken by a greater proportion of this group versus all travellers include skiing/snowboarding, discos, surfing and swimming – a reflection of Winter Enthusiast's young age profile.

8.3.1 Demographic Profile

Compared with all travellers, the Winter Enthusiast Segment has a younger age profile with 63% aged under 35 (compared to 38% of all travellers). They are more likely to be unmarried/non-defacto, have a high socio-economic status (education, income, occupation), and come from catpial cities. Household income is high for this segment overall.

Table 17: Demographic Characteristics of the Winter Enthusiast Segment

	WINTER ENTHUSIAST	ALL TRAVELLERS
SEX		
Men	51%	48%
Women	49%	52%
AGE		
14-17	13%	6%
18-24	21%	12%
25-34	29%	20%
35-49	25%	28%
50-64	10%	23%
65 and Over	1%	11%
MARITAL STATUS		
Married/De Facto	48%	65%
Single	52%	35%
SOCIO-ECONOMIC SCALE		
AB Quintile	38%	24%
C Quintile	25%	22%
D Quintile	18%	20%
E Quintile	12%	18%
FG Quintile	7%	15%
HOUSEHOLD LIFE-CYCLE		
Young Singles	20%	11%
Young Couples	14%	8%
Young Parents	28%	25%
Mid-Life Families	14%	12%
Mid-Life Households	22%	31%
Older Households	2%	13%

	WINTER ENTHUSIAST	ALL TRAVELLERS
ROY MORGAN VALUES SEGMENTS*		
Basic Needs	0%	2%
Fairer Deal	3%	4%
Traditional Family Life	3%	19%
Conventional Family Life	4%	8%
'Look At Me'	19%	11%
Something Better	6%	7%
Real Conservatism	1%	4%
Young Optimism	19%	9%
Visible Achievement	19%	20%
Socially Aware	25%	16%
EDUCATION LEVEL		
Primary School	0%	2%
Some Secondary/Tech.	18%	17%
Intermediate/Form 4/Year 10	7%	14%
5th form/Leaving/Year 11	5%	7%
Finished Tech./Matric/HSC/Year 12	17%	18%
Some/ Now at University	11%	11%
Have Diploma or Degree	42%	31%
OCCUPATION		
Professional/Manager	25%	17%
Farm Owner	0%	1%
White Collar Workers	28%	25%
Skilled Workers	8%	7%
Others (incl. Semi/Unskilled)	11%	12%
Home Duties	4%	9%
Don't Work	1%	2%
Looking for Full Time work	3%	3%
Looking for Part Time Work	2%	2%
Retired	2%	15%
Students	15%	7%

* Developed in conjunction with Colin Benjamin of The Horizons Network

	WINTER ENTHUSIAST	ALL TRAVELLERS
REGION		
Capital Cities	73%	63%
Country Areas	27%	37%
STATES		
N.S.W.	46%	36%
Victoria	30%	26%
Queensland	5%	18%
South Australia	1%	8%
Western Australia	6%	10%
Tasmania	11%	2%
HOUSEHOLD INCOME		
Average per annum	CAD$77,061	CAD$57,321
BASE	**(N=2,268)**	**(N=35,643)**

8.3.2 Attitudinal Profile

Compared to all travellers, the Winter Enthusiast Segment are more likely to organise travel on behalf of family and friends. They particularly enjoy active holidays.

Table 18: Holiday Attitudes of the Winter Enthusiast Segment

	WINTER ENTHUSIAST	ALL TRAVELLERS
HOLIDAY ATTITUDES		
More likely to agree:		
I sometimes organise holidays on behalf of my family and friends	38%	27%
I like to go away on weekends	72%	57%
I'm always very active on holidays	57%	46%
I prefer the bright lights and big cities when I travel	18%	15%
For my next holiday, I'd really like a total ecotourism experience	23%	19%
It only feels like a holiday if I leave Australia	6%	5%
I usually leave holiday arrangements to someone else	24%	21%
I'd like to holiday where I can experience the local culture	76%	70%
I usually book and arrange all my holiday travel details myself	66%	64%
I like to take holidays within Australia	88%	87%
I like to take my holidays away from crowds	73%	73%
I prefer to holiday where I can see nature or be in a natural setting	73%	73%
I sometimes organise holidays on behalf of my family and friends	23%	23%
Less likely to agree:		
I avoid staying at accommodation that does not have genuine environmental policies	17%	17%
On holidays I like to do as little as possible	33%	45%
BASE	**(N=2,268)**	**(N=35,643)**

The Winter Enthusiast segment was approximately one-third more likely than travellers in general to agree with 20 of the attitudinal statements measured on Roy Morgan Single Source. (Out of over 150 attitudinal statements measured).

The younger, up-market demographic profile of the Winter Enthusiast Segment comes through in terms of the attitudes they are more likely to agree with. They are an active, fashion-conscious, sociable and tech-savvy group who are seeking freedom and new experiences.

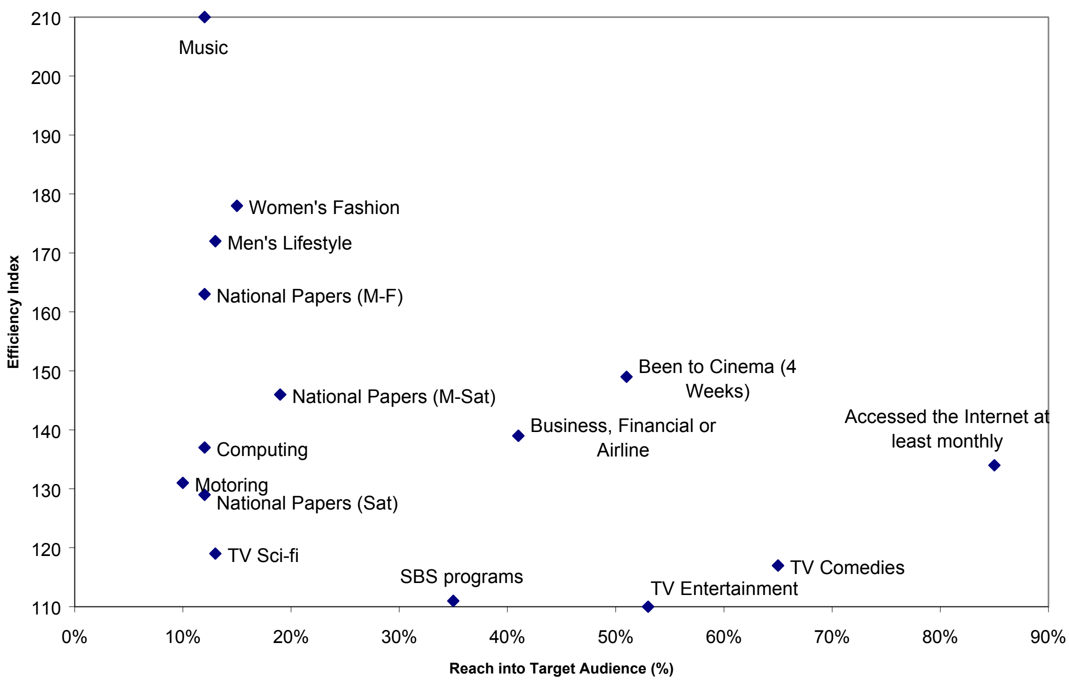
Table 19: Distinctive Attitudes of the Winter Enthusiast Segment

	WINTER ENTHUSIAST	ALL TRAVELLERS
ATTITUDES		
At least 30% more likely to agree:		
I love to do as many sports as possible	60%	39%
I wear clothes that will get me noticed	55%	39%
I drink more premium beer now than I used to (respondents 18+)	51%	33%
If I hear of a new alcoholic drink I will try it (respondents 18+)	51%	38%
Computers and technology give me more control over my life	49%	36%
I like tough physical activity	45%	34%
I believe in taking risks	42%	26%
I like to be with a crowd of people	42%	27%
It is important to have a full social life	42%	32%
Freedom is more important than the law	41%	29%
Homosexual couples should be allowed to adopt children	31%	23%
I'm more interested in my job than my house	31%	24%
I drink more wine now than I used to (respondents 18+)	27%	19%
I'm a bit of an intellectual	26%	15%
I look for new experiences every day	24%	18%
I sometimes organise holidays on behalf of my family and friends	24%	19%
BASE	**(N=2,268)**	**(N=35,643)**

8.3.3 Media Usage

Compared to all travellers, the Winter Enthusiast segment are more likely to read the national newspapers and a range of magazine types including Music, Women's Fashion, Men's Lifestyle, Computing and Business Financial or Airline magazines. They are also more likely to have been to the cinema, watch SBS and Sci-Fi, Entertainment and Comedy programs on TV and access the Internet at least monthly.

Figure 21: High-Efficiency, High-Reach Media Types for the Winter Enthusiast Segment



Base: All travellers (n=35,643)
See Appendix (p.119) for an explanation on how to interpret this graph

From the general media types highlighted on the previous page, the chart below shows the specific publications and programs that are most effective.

Figure22: High-Efficiency, High-Reach Publications and Programs for the Winter Enthusiast Segment

Base: All travellers (n=35,643)
See Appendix (p.119) for an explanation on how to interpret this graph

8.3.4 Marketing Funnel

In terms of the key 'Marketing Funnel' indicators, Canada is a popular destination with the Winter Enthusiast segment in terms of a preferred destination. The relative strength of this measure is reflected in preference to repeat-visit to Canada.

Table 20: Marketing Funnel for the Winter Enthusiast segment

	WINTER ENTHUSIAST	ALL TRAVELLERS
MARKETING FUNNEL FOR CANADA		
Awareness	26%	20%
Preference	18%	9%
Intention	4%	2%
Visitation	3%	1%
Attrition*	80%	83%
Re-visit potential: Preference**	53%	32%
Re-visit potential: Intention***	11%	12%
BASE	**(N=2,268)**	**(N=35,643)**

* *Among those who would like to visit Canada in the next 2 years (ie Preferrers), the percentage who do not* intend *visiting on their next trip.*

** *Among those who have visited Canada in the last 12 months, the percentage who would like to visit again in the next 2 years.*

*** *Among those who have visited Canada in the last 12 months, the percentage who intend visiting on their next trip.*

8.3.5 Competitive Context

Canada was the 3rd most preferred destination for the Winter Enthusiast segment, after the United States and United Kingdom. Note France (another key skiing location) performed strongly.

Table 21: Top 20 Preferred Overseas Destinations for the Winter Enthusiast segment

	WINTER ENTHUSIAST
PREFERRED OVERSEAS DESTINATIONS	
United States	20%
United Kingdom	19%
Canada	18%
France	13%
Italy	13%
Hawaii	9%
Republic of Ireland	7%
Fiji	7%
Scotland	7%
Mexico, Central America, South America	7%
Bali	7%
Switzerland/ Austria	7%
Greece	7%
Scandinavia, Finland, Sweden, Denmark, Norway	6%
Germany	6%
Spain/ Portugal	5%
Thailand	5%
Japan	4%
Egypt	4%
South Africa	4%
BASE	**(N=2,268)**

8.3.6 Holiday Behaviour

The tables below summarise the behaviour of the Winter Enthusiast segment on their last holiday of 3 or more nights including: transport, accommodation, travel party, information sources, booking methods, spend and duration of trip.

Table 22A: Winter Enthusiast segment: Transport on last holiday of 3 or more nights

	WINTER ENTHUSIAST	ALL TRAVELLERS
TOTAL NUMBER OF NIGHTS AWAY ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average (Nights)	14	14
SPEND PER PERSON PER NIGHT ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average	$124	$100
MODES OF TRANSPORT USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Aeroplane	$\boxed{39\%}$	33%
Own car or 4WD	47%	48%
Friends/relatives car or 4WD	$\boxed{20\%}$	15%
Hire car or 4WD	14%	10%
Caravan/ Campervan	3%	4%
Bus/ Coach	18%	14%
Train	14%	11%
Cruise ship	2%	2%
Boat/Ferry/Other boat	11%	8%
Motorbike	2%	1%
Bicycle	3%	1%
Some other	4%	3%
Total gave a mode of transport	91%	88%
BASE	**(N=2,014)**	**(N=29,053)**

Table 22B: Winter Enthusiast segment: Accommodation on last holiday of 3 or more nights

	WINTER ENTHUSIAST	ALL TRAVELLERS
TYPES OF ACCOMMODATION USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Own holiday house, flat	5%	4%
Friends/Relatives home	39%	40%
Rented fully self-contained flat, unit, etc	13%	12%
Rented serviced apartment	6%	4%
Rented house	4%	3%
Luxury hotel or resort: 5 star	8%	6%
4 star hotel or resort	12%	11%
Standard hotel/motel or resort	16%	16%
Bed & Breakfast, Host farm	5%	3%
Youth hostel or backpackers	5%	2%
Caravan	5%	6%
Tent/camping	9%	7%
Cabin	5%	6%
Boat/House-boat/Ship	2%	2%
Some other	3%	2%
Total gave a type of accommodation used on last long trip	91%	89%
BASE	**(N=2,014)**	**(N=29,053)**

Table 22C: Winter Enthusiast segment: Information sources on last holiday of 3 or more nights

	WINTER ENTHUSIAST	ALL TRAVELLERS
PLACES WHICH HELPED IN CHOOSING LAST HOLIDAY DESTINATION OF 3 OR MORE NIGHTS		
Travel Agent	19%	18%
Airline	5%	4%
State Tourism Authority/ Government Travel Centre	5%	5%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	6%	8%
Tour Operator	2%	2%
TV advertising	1%	1%
TV program (eg.Lifestyle or Travel show)	2%	2%
Newspaper advertising	3%	3%
Newspaper articles	1%	1%
Magazine advertising	1%	1%
Magazine articles	1%	1%
Brochures	13%	10%
Travel or guide books	11%	10%
Friends or relatives who had visited the destination	15%	12%
Friends or relatives who live at the destination	13%	14%
I had been there before	23%	20%
Internet	16%	10%
Loyalty programme	1%	1%
Some other	5%	4%
Total had help in choosing destination of last long trip	70%	67%
I did not obtain any information	21%	21%
BASE	**(N=2,014)**	**(N=29,053)**

Table 22D: Winter Enthusiast segment: Booking methods on last holiday of 3 or more nights

	WINTER ENTHUSIAST	ALL TRAVELLERS
HOW LAST HOLIDAY OF 3 OR MORE NIGHTS WAS BOOKED		
Travel Agent	25%	23%
Airline	11%	9%
Tour Operator	2%	2%
State Tourism Authority/ Government Travel Centre	1%	2%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	1%	1%
Shipping Line	1%	0%
Internet	11%	8%
Booked accommodation directly	26%	24%
Booked hire car directly	4%	3%
Booked other travel directly	4%	3%
Some other	7%	6%
Can't say method used	1%	1%
Total booked last long trip	68%	63%
I did not book my last trip	24%	26%
BASE	**(N=2,014)**	**(N=29,053)**

Table 22E: Winter Enthusiast segment: Activities on last holiday of 3 or more nights

	WINTER ENTHUSIAST	ALL TRAVELLERS
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Visiting friends or relatives	46%	49%
Shopping	34%	36%
Restaurants/ international food/ wine	33%	28%
Cinema/ movies	14%	10%
Musical performances/ concerts	5%	4%
Theatre going	2%	2%
Disco/ nightlife	10%	5%
Visited a Casino	5%	5%
Played poker machines	5%	7%
Informal cards eg. Bridge,Poker,etc	4%	2%
Video Arcade eg. Timezone,Laserforce	3%	2%
Other social activities	46%	42%
Horse racing eg. Melbourne Cup	1%	1%
Football/ Rugby/ Cricket eg. Football Final, Rugby Test	2%	1%
Motor racing eg. Grand Prix, Indy, Bathurst	1%	1%
Other spectator sporting events eg. Golf,Tennis	2%	1%
Arts Festival, Cultural Event	3%	3%
Exhibition, Show eg. Home, Motor, Air	2%	2%
Special interest meetings eg. Sporting Club	2%	2%
Other special events	11%	10%
Tennis/ squash	5%	3%
Golf	5%	4%
Snow Skiing,Snowboarding	20%	2%
Bike riding	5%	3%
Horse riding/ trail riding	3%	1%
Playing Other sports	4%	2%
Fishing/ hunting	9%	10%
Bushwalking	16%	14%
Surfing/ swimming	31%	25%
Sailing	3%	2%
BASE	**(N=2,014)**	**(N=29,053)**

	Winter enthusiast	All travellers
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS (CONTINUED)		
Water Skiing	2%	1%
Other adventure activities eg. Rock Climbing, Bungee jumping	6%	2%
Other outdoor activities	20%	17%
Museums	15%	15%
Art Galleries	12%	10%
Theme/ entertainment parks eg. Disneyland, Sovereign Hill, Movie World, Dream World, Luna Park	11%	9%
Gardens/ Parks	15%	18%
Zoo/ sanctuary/ animal parks	10%	11%
Historical places	19%	21%
Wineries/ vineyards	8%	9%
Country/ wildlife/ scenery	24%	23%
Wilderness	14%	10%
National parks,Forests	26%	23%
Cities	22%	20%
Other sightseeing	25%	30%
Rest & relaxation	53%	57%
Meet & mix with other people	25%	25%
Beach holiday	25%	22%
Cruise on a ship	2%	2%
Luxurious/ comfortable holiday	7%	7%
Package tour	1%	2%
Backpacking	4%	2%
Nature holiday eg. camping	6%	5%
Living with or experiencing local culture	8%	6%
A real ecotourism experience	2%	1%
Health resort/spa holiday	1%	1%
Other particular holiday experience	17%	13%
Total gave a type of activity	93%	91%
Base	**(n=2,014)**	**(n=29,053)**

8.4 History Enthusiast Segment

There are 1.6 million people within the History Enthusiast segment. They tend to be older and are more likely to be employed in professional or white-collar occupations. Experiencing the local culture is top of the list for this segment, with holidays more likely to be arranged by themselves. Activities undertaken whilst on holiday are often culturally-based.

History enthusiasts tend to be intellectually minded, and are careful when it comes to their choice of diet. Over half of this segment are women.

Compared to all travellers, the History Enthusiast segment are more likely to read the national and metropolitan newspapers and a range of magazine types including Women's Fashion, Motoring Club, Home and Lifestyle, General and Business Financial or Airline magazines. They are also more likely to have been to the cinema, watch SBS and the ABC* and Documentaries on TV and access the Internet at least monthly.

Preference for Canada as a future tourist destination is much lower for this segment – it appears a destination is visited, explored, then 'ticked off' the list.

The History Enthusiast Segment are more likely to stay in hotel/motel accommodation, and partake in on-land transport such as trains, coaches, boats and hire cars. It seems History Enthusiasts are well researched on a destination before travelling, as indicated by their utilisation of magazines, guidebooks, the Internet and friends and relatives who had already visited the destination. Travel agents are also sourced for information related to travel plans.

* <u>Australian</u> Broadcasting Corporation

8.4.1 Demographic Profile

Compared with all travellers, the History Enthusiast Segment has an older age profile with 42% aged over 50 (compared to 34% of all travellers). They are of high socio-economic status Household income levels are higher for this segment than for travellers in general (CAD$65,344 cf CAD$57,321).

Table 23: Demographic Characteristics of the History Enthusiast Segment

	HISTORY ENTHUSIAST	ALL TRAVELLERS
SEX		
Men	43%	48%
Women	57%	52%
AGE		
14-17	4%	6%
18-24	10%	12%
25-34	17%	20%
35-49	27%	28%
50-64	30%	23%
65 and Over	12%	11%
MARITAL STATUS		
Married/De Facto	65%	65%
Single	35%	35%
SOCIO-ECONOMIC SCALE		
AB Quintile	36%	24%
C Quintile	26%	22%
D Quintile	17%	20%
E Quintile	13%	18%
FG Quintile	8%	15%
HOUSEHOLD LIFE-CYCLE		
Young Singles	11%	11%
Young Couples	9%	8%
Young Parents	16%	25%
Mid-Life Families	12%	12%
Mid-Life Households	38%	31%
Older Households	13%	13%

	HISTORY ENTHUSIAST	ALL TRAVELLERS
ROY MORGAN VALUES SEGMENTS*		
Basic Needs	1%	2%
Fairer Deal	1%	4%
Traditional Family Life	19%	19%
Conventional Family Life	5%	8%
'Look At Me'	7%	11%
Something Better	4%	7%
Real Conservatism	3%	4%
Young Optimism	11%	9%
Visible Achievement	22%	20%
Socially Aware	26%	16%
EDUCATION LEVEL		
Primary School	1%	2%
Some Secondary/Tech.	11%	17%
Intermediate/Form 4/Year 10	9%	14%
5th form/Leaving/Year 11	6%	7%
Finished Tech./Matric/HSC/Year 12	14%	18%
Some/ Now at University	14%	11%
Have Diploma or Degree	46%	31%
OCCUPATION		
Professional/Manager	22%	17%
Farm Owner	1%	1%
White Collar Workers	29%	25%
Skilled Workers	6%	7%
Others (incl. Semi/Unskilled)	7%	12%
Home Duties	7%	9%
Don't Work	2%	2%
Looking for Full Time work	2%	3%
Looking for Part Time Work	2%	2%
Retired	17%	15%
Students	5%	7%

* Developed in conjunction with Colin Benjamin of The Horizons Network

	HISTORY ENTHUSIAST	ALL TRAVELLERS
REGION		
Capital Cities	68%	63%
Country Areas	32%	37%
STATES		
N.S.W.	37%	36%
Victoria	26%	26%
Queensland	15%	18%
South Australia	8%	8%
Western Australia	12%	10%
Tasmania	2%	2%
HOUSEHOLD INCOME		
Average per annum	CAD$65,344	CAD$57,321
BASE	**(N=5,337)**	**(N=35,643)**

8.4.2 Attitudinal Profile

Compared to all travellers, the History Enthusiast Segment have a strong desire to experience the local culture. They are less interested in organised holidays and prefer to be doing things whilst on holiday.

Table 24: Holiday Attitudes of the History Enthusiast Segment

	HISTORY ENTHUSIAST	ALL TRAVELLERS
HOLIDAY ATTITUDES		
More likely to agree:		
I'd like to holiday where I can experience the local culture	88%	70%
For my next holiday, I'd really like a total ecotourism experience	22%	19%
I sometimes organise holidays on behalf of my family and friends	31%	27%
It only feels like a holiday if I leave Australia	6%	5%
I avoid staying at accommodation that does not have genuine environmental policies	19%	17%
I'm always very active on holidays	49%	46%
I usually book and arrange all my holiday travel details myself	69%	64%
I prefer to holiday where I can see nature or be in a natural setting	76%	73%
I prefer the bright lights and big cities when I travel	15%	15%
I like to go away on weekends	58%	57%
I like to take my holidays away from crowds	74%	73%
Less likely to agree:		
I like to take holidays within Australia	86%	87%
I usually leave holiday arrangements to someone else	19%	21%
I enjoy holidays where everything is organised for you	18%	23%
On holidays I like to do as little as possible	35%	45%
BASE	(N=5,337)	(N=35,643)

The History Enthusiast segment is passionate about culture and the environment. They also fancy themselves as intellectuals who are quite discerning when it comes to food and wine/beer choices. Religion is of notable significance for this segment also.

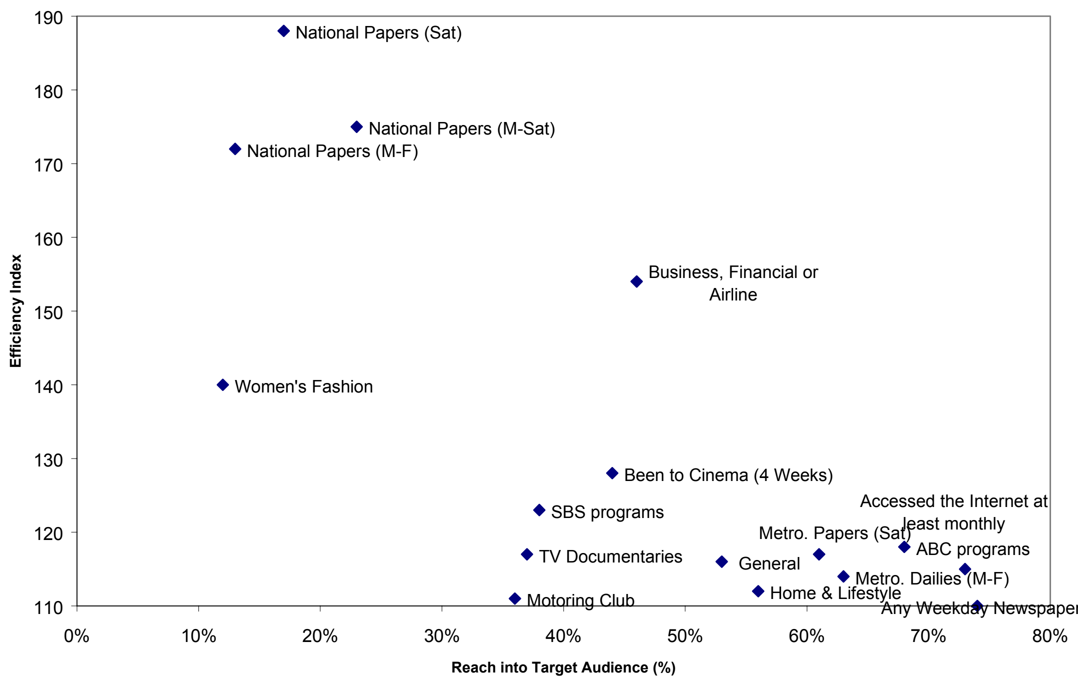
Table 25: Distinctive Attitudes of the History Enthusiast Segment

	History Enthusiast	All travellers
ATTITUDES		
At least 20% more likely to agree:		
Aboriginal culture is an essential component of Australian society	83%	69%
At heart I'm an environmentalist	80%	69%
I try to buy additive free food	64%	54%
I like to drink wine with my meals	46%	33%
I drink more wine now than I used to (respondents 18+)	44%	37%
I'm a bit of an intellectual	43%	34%
Terrorists deserve the same rights as other criminals	42%	32%
Homosexual couples should be allowed to adopt children	41%	36%
Computers and technology give me more control over my life	33%	27%
I believe a percent of everyone's income should go to charities	32%	24%
I always read the business section of the newspaper	32%	27%
I regularly go to church or my place of worship	31%	25%
I try to buy organic food whenever I can	29%	22%
I drink more premium beer now than I used to (drinkers 18+)	24%	20%
I'm more interested in my job than my house	21%	18%
The food I eat is all, or almost all, vegetarian	12%	9%
I consider myself a homosexual	3%	2%
Base	**(n=5,337)**	**(n=35,643)**

8.4.3 Media Usage

Compared to all travellers, the History Enthusiast segment are more likely to read the national and metropolitan newspapers and a range of magazine types including Women's Fashion, Motoring Club, Home and Lifestyle, General and Business Financial or Airline magazines. They are also more likely to have been to the cinema, watch SBS and the ABC and Documentaries on TV and access the Internet at least monthly.

Figure 23: High-Efficiency, High-Reach Media Types for the History Enthusiast Segment



Base: All travellers (n=35,643)
See Appendix (p.119) for an explanation on how to interpret this graph

From the general media types highlighted on the previous page, the chart below shows the specific publications and programs that are most effective.

Figure 24: High-Efficiency, High-Reach Publications and Programs for the History Enthusiast Segment

Base: All travellers (n=35,643)
See Appendix (p.119) for an explanation on how to interpret this graph

8.4.4 Marketing Funnel

In terms of the key 'Marketing Funnel' indicators for Canada, the History Enthusiast segment slightly outperformed travellers in general. However the potential for repeat visitation is lower among this segment, suggesting that this group is more likely to 'do' a destination once and then move on.

Table 26: Marketing Funnel for the History Enthusiast segment

	HISTORY ENTHUSIAST	ALL TRAVELLERS
MARKETING FUNNEL FOR CANADA		
Awareness	24%	20%
Preference	11%	9%
Intention	3%	2%
Visitation	2%	1%
Attrition*	81%	83%
Re-visit potential: Preference**	28%	32%
Re-visit potential: Intention***	7%	12%
BASE	**(N=5,337)**	**(N=35,643)**

* *Among those who would like to visit Canada in the next 2 years (ie Preferrers), the percentage who do not intend visiting on their next trip.*

** *Among those who have visited Canada in the last 12 months, the percentage who would like to visit again in the next 2 years.*

*** *Among those who have visited Canada in the last 12 months, the percentage who intend visiting on their next trip.*

8.4.5 Competitive Context

Canada was the 6th most preferred destination for the History Enthusiast segment. European destinations are popular with this group, as was New Zealand

Table 27: Top 20 Preferred Overseas Destinations for the History Enthusiast segment

	HISTORY ENTHUSIAST
PREFERRED OVERSEAS DESTINATIONS	
United Kingdom	20%
New Zealand	16%
United States	14%
Italy	13%
France	12%
Canada	11%
Scotland	9%
Republic of Ireland	7%
Greece	7%
Hawaii	6%
Mexico, Central America, South America	6%
Spain/ Portugal	6%
Fiji	5%
Bali	5%
Switzerland/ Austria	5%
Scandinavia, Finland, Sweden, Denmark, Norway	5%
Thailand	5%
Germany	4%
Egypt	4%
Russia, Poland, Hungary, other Eastern Europe	4%
BASE	**(N=5,337)**

8.4.6 Holiday Behaviour

The tables below summarise the behaviour of the History Enthusiast segment on their last holiday of 3 or more nights including: transport, accommodation, travel party, information sources, booking methods, spend and duration of trip.

Table 28A: History Enthusiast segment: Transport on last holiday of 3 or more nights

	HISTORY ENTHUSIAST	ALL TRAVELLERS
TOTAL NUMBER OF NIGHTS AWAY ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average (Nights)	18	14
SPEND PER PERSON PER NIGHT ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average	$136	$100
MODES OF TRANSPORT USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Aeroplane	50%	33%
Own car or 4WD	40%	48%
Friends/relatives car or 4WD	18%	15%
Hire car or 4WD	19%	10%
Caravan/ Campervan	5%	4%
Bus/ Coach	24%	14%
Train	20%	11%
Cruise ship	3%	2%
Boat/Ferry/Other boat	17%	8%
Motorbike	1%	1%
Bicycle	2%	1%
Some other	5%	3%
Total gave a mode of transport	95%	88%
BASE	**(N=5,337)**	**(N=29,053)**

Table 28B: History Enthusiast segment: Accommodation on last holiday of 3 or more nights

	HISTORY ENTHUSIAST	ALL TRAVELLERS
TYPES OF ACCOMMODATION USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Own holiday house, flat	3%	4%
Friends/Relatives home	40%	40%
Rented fully self-contained flat, unit, etc	13%	12%
Rented serviced apartment	6%	4%
Rented house	3%	3%
Luxury hotel or resort: 5 star	10%	6%
4 star hotel or resort	18%	11%
Standard hotel/motel or resort	28%	16%
Bed & Breakfast, Host farm	8%	3%
Youth hostel or backpackers	6%	2%
Caravan	6%	6%
Tent/camping	7%	7%
Cabin	8%	6%
Boat/House-boat/Ship	3%	2%
Some other	3%	2%
Total gave a type of accommodation used on last long trip	96%	89%
BASE	**(N=5,337)**	**(N=29,053)**

Table 28C: History Enthusiast segment: Information sources on last holiday of 3 or more nights

	HISTORY ENTHUSIAST	ALL TRAVELLERS
PLACES WHICH HELPED IN CHOOSING LAST HOLIDAY DESTINATION OF 3 OR MORE NIGHTS		
Travel Agent	29%	18%
Airline	6%	4%
State Tourism Authority/ Government Travel Centre	10%	5%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	11%	8%
Tour Operator	5%	2%
TV advertising	2%	1%
TV program (eg.Lifestyle or Travel show)	3%	2%
Newspaper advertising	4%	3%
Newspaper articles	3%	1%
Magazine advertising	1%	1%
Magazine articles	3%	1%
Brochures	19%	10%
Travel or guide books	22%	10%
Friends or relatives who had visited the destination	20%	12%
Friends or relatives who live at the destination	19%	14%
I had been there before	23%	20%
Internet	19%	10%
Loyalty programme	2%	1%
Some other	5%	4%
Total had help in choosing destination of last long trip	84%	67%
I did not obtain any information	14%	21%
BASE	**(N=5,337)**	**(N=29,053)**

Table 28D: History Enthusiast segment: Booking methods on last holiday of 3 or more nights

	HISTORY ENTHUSIAST	ALL TRAVELLERS
HOW LAST HOLIDAY OF 3 OR MORE NIGHTS WAS BOOKED		
Travel Agent	36%	23%
Airline	13%	9%
Tour Operator	3%	2%
State Tourism Authority/ Government Travel Centre	2%	2%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	1%	1%
Shipping Line	1%	0%
Internet	13%	8%
Booked accommodation directly	28%	24%
Booked hire car directly	6%	3%
Booked other travel directly	5%	3%
Some other	7%	6%
Can't say method used	0%	1%
Total booked last long trip	80%	63%
I did not book my last trip	18%	26%
BASE	**(N=5,337)**	**(N=29,053)**

Table 28E: History Enthusiast segment: Activities on last holiday of 3 or more nights

	HISTORY ENTHUSIAST	ALL TRAVELLERS
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Visiting friends or relatives	53%	49%
Shopping	50%	36%
Restaurants/ international food/ wine	48%	28%
Cinema/ movies	15%	10%
Musical performances/ concerts	15%	4%
Theatre going	6%	2%
Disco/ nightlife	8%	5%
Visited a Casino	8%	5%
Played poker machines	8%	7%
Informal cards eg. Bridge,Poker,etc	3%	2%
Video Arcade eg. Timezone,Laserforce	2%	2%
Other social activities	49%	42%
Horse racing eg. Melbourne Cup	1%	1%
Football/ Rugby/ Cricket eg. Football Final, Rugby Test	3%	1%
Motor racing eg. Grand Prix, Indy, Bathurst	1%	1%
Other spectator sporting events eg. Golf,Tennis	2%	1%
Arts Festival, Cultural Event	11%	3%
Exhibition, Show eg. Home, Motor, Air	4%	2%
Special interest meetings eg. Sporting Club	2%	2%
Other special events	13%	10%
Tennis/ squash	4%	3%
Golf	4%	4%
Snow Skiing,Snowboarding	2%	2%
Bike riding	4%	3%
Horse riding/ trail riding	2%	1%
Playing Other sports	2%	2%
Fishing/ hunting	7%	10%
Bushwalking	24%	14%
Surfing/ swimming	25%	25%
Sailing	2%	2%
BASE	**(N=5,337)**	**(N=29,053)**

	History enthusiast	All travellers
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS (CONTINUED)		
Water Skiing	1%	1%
Other adventure activities eg. Rock Climbing, Bungee jumping	4%	2%
Other outdoor activities	22%	17%
Museums	52%	15%
Art Galleries	40%	10%
Theme/ entertainment parks eg. Disneyland, Sovereign Hill, Movie World, Dream World, Luna Park	11%	9%
Gardens/ Parks	42%	18%
Zoo/ sanctuary/ animal parks	19%	11%
Historical places	67%	21%
Wineries/ vineyards	19%	9%
Country/ wildlife/ scenery	45%	23%
Wilderness	21%	10%
National parks,Forests	41%	23%
Cities	44%	20%
Other sightseeing	46%	30%
Rest & relaxation	63%	57%
Meet & mix with other people	36%	25%
Beach holiday	20%	22%
Cruise on a ship	4%	2%
Luxurious/ comfortable holiday	12%	7%
Package tour	5%	2%
Backpacking	4%	2%
Nature holiday eg. camping	6%	5%
Living with or experiencing local culture	16%	6%
A real ecotourism experience	3%	1%
Health resort/spa holiday	1%	1%
Other particular holiday experience	20%	13%
Total gave a type of activity	100%	91%
Base	**(n=5,337)**	**(n=29,053)**

8.5 City Resort Segment

There are 1.8 million people within the City Resort segment. They have a slightly younger age profile and are of high socio-economic status. City Resort travellers are attracted to cities, and many City Resort travellers are from cities themselves. They are an active, brand conscious group, who are open to new ideas and experiences. Material goods are important to this group.

Compared to all travellers, the City Resort segment are more likely to read the national and metropolitan newspapers and a range of magazine types including Women's Fashion, Men's Lifestyle, Women's Lifestyle, Computing and Business Financial or Airline magazines. They are also more likely to have been to the cinema, watch Pay TV and access the Internet at least monthly.

Preference to visit Canada exists among one-third of this group, with Canada rating 6th behind other key Australian outbound destinations. Canada will need to be quite competitive in terms of promoting their cities to effectively target this group.

They are active travellers, utilising a variety of transport types. Not surprisingly, City Resort travellers are likely to stay in hotels and resorts (of all standards). Bed and Breakfast accommodation also appeals. City-based activities are more apparent among this segment opposed other nature-based, outdoor activities. Spend per trip and per night is very high – City Resort travellers are obviously are not afraid to 'live it up' in the cities they are visiting.

8.5.1 Demographic Profile

Compared with all travellers, the City Resort Segment has a slightly younger age profile but on average quite consistent with all travellers. Socio-economic status is high, and life stage is skewed to younger singles/couples/parents. Most City Resort travellers are from cities themselves, the proportion being higher for this segment than travellers overall.

Table 29: Demographic Characteristics of the City Resort Segment

	CITY RESORT	ALL TRAVELLERS
SEX		
Men	47%	48%
Women	53%	52%
AGE		
14-17	8%	6%
18-24	16%	12%
25-34	21%	20%
35-49	26%	28%
50-64	22%	23%
65 and Over	7%	11%
MARITAL STATUS		
Married/De Facto	59%	65%
Single	41%	35%
SOCIO-ECONOMIC SCALE		
AB Quintile	33%	24%
C Quintile	25%	22%
D Quintile	19%	20%
E Quintile	13%	18%
FG Quintile	9%	15%
HOUSEHOLD LIFE-CYCLE		
Young Singles	15%	11%
Young Couples	12%	8%
Young Parents	20%	25%
Mid-Life Families	13%	12%
Mid-Life Households	32%	31%
Older Households	8%	13%

	CITY RESORT	ALL TRAVELLERS
ROY MORGAN VALUES SEGMENTS*		
Basic Needs	1%	2%
Fairer Deal	4%	4%
Traditional Family Life	13%	19%
Conventional Family Life	6%	8%
'Look At Me'	12%	11%
Something Better	6%	7%
Real Conservatism	2%	4%
Young Optimism	14%	9%
Visible Achievement	21%	20%
Socially Aware	22%	16%
EDUCATION LEVEL		
Primary School	1%	2%
Some Secondary/Tech.	14%	17%
Intermediate/Form 4/Year 10	10%	14%
5th form/Leaving/Year 11	6%	7%
Finished Tech./Matric/HSC/Year 12	16%	18%
Some/ Now at University	14%	11%
Have Diploma or Degree	39%	31%
OCCUPATION		
Professional/Manager	22%	17%
Farm Owner	0%	1%
White Collar Workers	28%	25%
Skilled Workers	7%	7%
Others (incl. Semi/Unskilled)	10%	12%
Home Duties	6%	9%
Don't Work	2%	2%
Looking for Full Time work	3%	3%
Looking for Part Time Work	2%	2%
Retired	11%	15%
Students	10%	7%

* Developed in conjunction with Colin Benjamin of The Horizons Network

	CITY RESORT	ALL TRAVELLERS
REGION		
Capital Cities	70%	63%
Country Areas	30%	37%
STATES		
N.S.W.	37%	36%
Victoria	26%	26%
Queensland	16%	18%
South Australia	8%	8%
Western Australia	10%	10%
Tasmania	2%	2%
HOUSEHOLD INCOME		
Average per annum	CAD$70,789	CAD$57,321
BASE	**(N=5,282)**	**(N=35,643)**

8.5.2 Attitudinal Profile

The City Resort Segment are drawn to the local culture of a destination, being people who like to actively travel anyway. The "bright lights and big cities" is of particular appeal to this segment, as reflected by them being less likely to be deterred by crowds or enjoy a natural setting.

Table 30: Holiday Attitudes of the City Resort Segment

	City Resort	All Travellers
HOLIDAY ATTITUDES		
More likely to agree:		
I prefer the bright lights and big cities when I travel	26%	15%
It only feels like a holiday if I leave Australia	8%	5%
I enjoy holidays where everything is organised for you	26%	23%
I sometimes organise holidays on behalf of my family and friends	31%	27%
I'm always very active on holidays	52%	46%
I like to go away on weekends	62%	57%
I'd like to holiday where I can experience the local culture	76%	70%
I usually leave holiday arrangements to someone else	23%	21%
I usually book and arrange all my holiday travel details myself	65%	64%
Less likely to agree:		
For my next holiday, I'd really like a total ecotourism experience	18%	19%
I like to take holidays within Australia	84%	87%
I like to take my holidays away from crowds	66%	73%
On holidays I like to do as little as possible	39%	45%
I prefer to holiday where I can see nature or be in a natural setting	63%	73%
I avoid staying at accommodation that does not have genuine environmental policies	14%	17%
Base	**(n=5,282)**	**(n=35,643)**

The City Resort segment was at least 20% more likely than travellers in general to agree with 20 of the attitudinal statements measured on Roy Morgan Single Source. (Out of over 150 attitudinal statements measured).

They fashion and brand conscious, typical of city dwellers. They are open to new experiences such as promotions as they believe in taking risks. They are sociable, like to be noticed usually though material goods. Technology is appealing and part of their control over life.

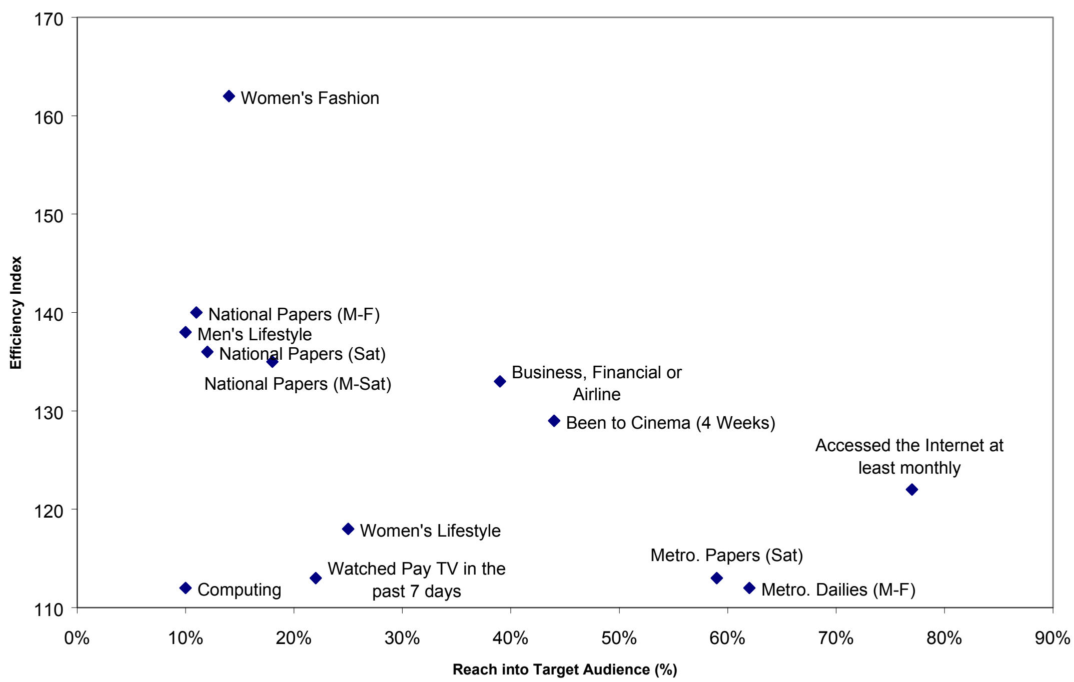
Table 31: Distinctive Attitudes of the City Resort Segment

	City Resort	All travellers
ATTITUDES		
At least 20% more likely to agree:		
I enjoy clothes shopping	57%	47%
It is important to have a full social life	49%	39%
I believe in taking risks	48%	39%
I like promotions that offer free gifts with a purchase (drinkers 18+)	48%	39%
I look for new experiences every day	46%	38%
I drink more wine now than I used to (respondents 18+)	45%	37%
I'm a bit of an intellectual	44%	34%
I like to be with a crowd of people	41%	29%
It's important to look fashionable	41%	31%
Terrorists deserve the same rights as other criminals	39%	32%
Computers and technology give me more control over my life	36%	27%
I go out of my way to learn everything I can about new technology	35%	29%
I will buy a product because of the label	30%	23%
I prefer the bright lights and big cities when I travel	26%	15%
I was born to shop	26%	18%
I drink more premium beer now than I used to (respondents 18+)	26%	20%
I wear clothes that will get me noticed	24%	15%
I choose a car mainly on its looks	24%	19%
If I hear of a new alcoholic drink I will try it (respondents 18+)	14%	11%
I consider myself a homosexual	3%	2%
Base	**(n=5,2825)**	**(n=35,643)**

8.5.3 Media Usage

Compared to all travellers, the City Resort segment are more likely to read the national and metropolitan newspapers and a range of magazine types including Women's Fashion, Men's Lifestyle, Women's Lifestyle, Computing and Business Financial or Airline magazines. They are also more likely to have been to the cinema, watch Pay TV and access the Internet at least monthly.

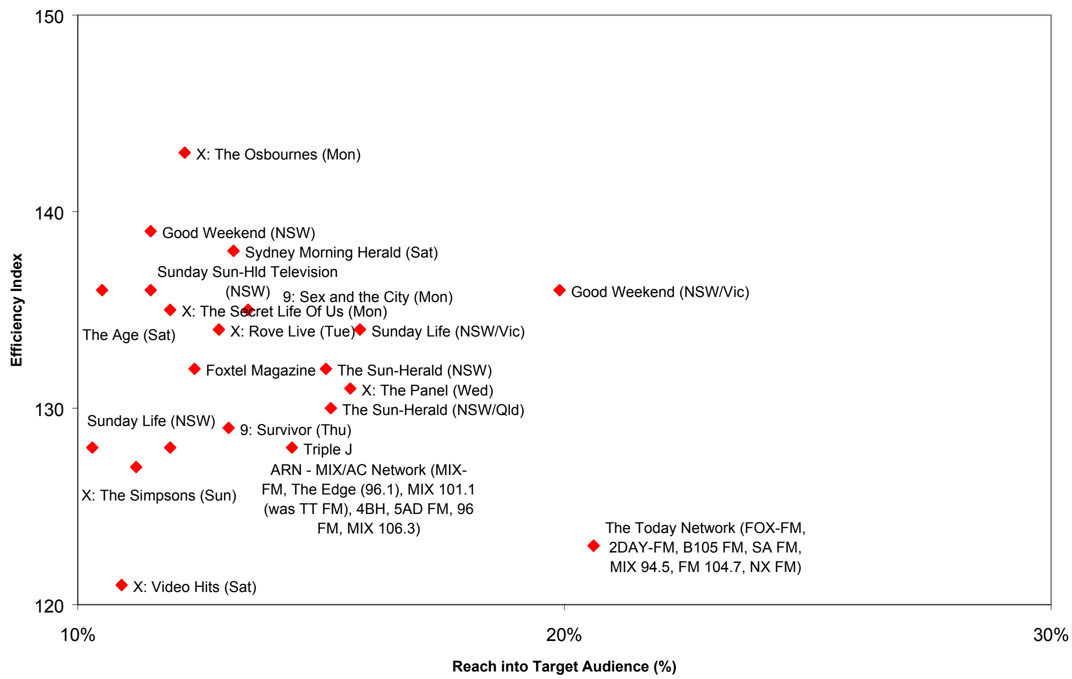
Figure 25: High-Efficiency, High-Reach Media Types for the City Resort Segment



Base: All travellers (n=35,643)
See Appendix (p.119) for an explanation on how to interpret this graph

From the general media types highlighted on the previous page, the chart below shows the specific publications and programs that are most effective.

Figure 26: High-Efficiency, High-Reach Publications and Programs for the City Resort Segment



Base: All travellers (n=35,643)
See Appendix (p.119) for an explanation on how to interpret this graph

8.5.4 Marketing Funnel

In terms of the key 'Marketing Funnel' indicators for Canada, the City Resort segment was on par with travellers in general. Marketing campaigns aligned to social frills of this group may boost the segment's awareness of advertising for Canada.

Table 32: Marketing Funnel for the City Resort segment

	CITY RESORT	ALL TRAVELLERS
MARKETING FUNNEL FOR CANADA		
Awareness	23%	20%
Preference	12%	9%
Intention	3%	2%
Visitation	2%	1%
Attrition*	82%	83%
Re-visit potential: Preference**	35%	32%
Re-visit potential: Intention***	15%	12%
BASE	**(N=5,282)**	**(N=35,643)**

* *Among those who would like to visit Canada in the next 2 years (ie Preferrers), the percentage who do not intend visiting on their next trip.*

** *Among those who have visited Canada in the last 12 months, the percentage who would like to visit again in the next 2 years.*

*** *Among those who have visited Canada in the last 12 months, the percentage who intend visiting on their next trip.*

8.5.5 Competitive Context

Canada was the 6th most preferred destination for the City Resort segment, behind major Australian outbound destinations.

Table 33: Top 20 Preferred Overseas Destinations for the City Resort segment

	City Resort
PREFERRED OVERSEAS DESTINATIONS	
United Kingdom	20%
United States	18%
New Zealand	15%
Italy	13%
France	13%
Canada	12%
Hawaii	9%
Scotland	8%
Republic of Ireland	7%
Bali	7%
Greece	7%
Thailand	7%
Fiji	6%
Mexico, Central America, South America	5%
Switzerland/ Austria	5%
Scandinavia, Finland, Sweden, Denmark, Norway	5%
Germany	5%
Spain/ Portugal	5%
Japan	4%
Egypt	4%
Base	**(n=5,282)**

8.5.6 Holiday Behaviour

The tables below summarise the behaviour of the City Resort segment on their last holiday of 3 or more nights including: transport, accommodation, travel party, information sources, booking methods, spend and duration of trip.

Table 34A: City Resort segment: Transport on last holiday of 3 or more nights

	CITY RESORT	ALL TRAVELLERS
TOTAL NUMBER OF NIGHTS AWAY ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average (Nights)	20	14
SPEND PER PERSON PER NIGHT ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average	$159	$100
MODES OF TRANSPORT USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Aeroplane	61%	33%
Own car or 4WD	32%	48%
Friends/relatives car or 4WD	19%	15%
Hire car or 4WD	21%	10%
Caravan/ Campervan	3%	4%
Bus/ Coach	26%	14%
Train	21%	11%
Cruise ship	4%	2%
Boat/Ferry/Other boat	17%	8%
Motorbike	2%	1%
Bicycle	2%	1%
Some other	7%	0
Total gave a mode of transport	94%	1
BASE	**(N=5,282)**	**(N=29,053)**

Table 34B: City Resort segment: Accommodation on last holiday of 3 or more nights

	City Resort	All Travellers
TYPES OF ACCOMMODATION USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Own holiday house, flat	4%	4%
Friends/Relatives home	41%	40%
Rented fully self-contained flat, unit, etc	14%	12%
Rented serviced apartment	8%	4%
Rented house	2%	3%
Luxury hotel or resort: 5 star	15%	6%
4 star hotel or resort	23%	11%
Standard hotel/motel or resort	27%	16%
Bed & Breakfast, Host farm	8%	3%
Youth hostel or backpackers	5%	2%
Caravan	4%	6%
Tent/camping	4%	7%
Cabin	6%	6%
Boat/House-boat/Ship	3%	2%
Some other	2%	2%
Total gave a type of accommodation used on last long trip	96%	89%
Base	**(n=5,282)**	**(n=29,053)**

Table 34C: City Resort segment: Information sources on last holiday of 3 or more nights

	City Resort	All Travellers
PLACES WHICH HELPED IN CHOOSING LAST HOLIDAY DESTINATION OF 3 OR MORE NIGHTS		
Travel Agent	39%	18%
Airline	8%	4%
State Tourism Authority/ Government Travel Centre	8%	5%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	9%	8%
Tour Operator	4%	2%
TV advertising	2%	1%
TV program (eg.Lifestyle or Travel show)	4%	2%
Newspaper advertising	5%	3%
Newspaper articles	3%	1%
Magazine advertising	2%	1%
Magazine articles	3%	1%
Brochures	19%	10%
Travel or guide books	21%	10%
Friends or relatives who had visited the destination	18%	12%
Friends or relatives who live at the destination	18%	14%
I had been there before	20%	20%
Internet	20%	10%
Loyalty programme	2%	1%
Some other	5%	4%
Total had help in choosing destination of last long trip	85%	67%
I did not obtain any information	13%	21%
Base	**(n=5,282)**	**(n=29,053)**

Table 34D: City Resort segment: Booking methods on last holiday of 3 or more nights

	CITY RESORT	ALL TRAVELLERS
HOW LAST HOLIDAY OF 3 OR MORE NIGHTS WAS BOOKED		
Travel Agent	45%	23%
Airline	15%	9%
Tour Operator	3%	2%
State Tourism Authority/ Government Travel Centre	2%	2%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	1%	1%
Shipping Line	1%	0%
Internet	14%	8%
Booked accommodation directly	25%	24%
Booked hire car directly	7%	3%
Booked other travel directly	5%	3%
Some other	6%	6%
Can't say method used	0%	1%
Total booked last long trip	85%	63%
I did not book my last trip	14%	26%
BASE	**(N=5,282)**	**(N=29,053)**

Table 34E: City Resort segment: Activities on last holiday of 3 or more nights

	CITY RESORT	ALL TRAVELLERS
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Visiting friends or relatives	52%	49%
Shopping	62%	36%
Restaurants/ international food/ wine	54%	28%
Cinema/ movies	18%	10%
Musical performances/ concerts	10%	4%
Theatre going	4%	2%
Disco/ nightlife	13%	5%
Visited a Casino	13%	5%
Played poker machines	11%	7%
Informal cards eg. Bridge,Poker,etc	3%	2%
Video Arcade eg. Timezone,Laserforce	4%	2%
Other social activities	51%	42%
Horse racing eg. Melbourne Cup	1%	1%
Football/ Rugby/ Cricket eg. Football Final, Rugby Test	3%	1%
Motor racing eg. Grand Prix, Indy, Bathurst	1%	1%
Other spectator sporting events eg. Golf,Tennis	2%	1%
Arts Festival, Cultural Event	7%	3%
Exhibition, Show eg. Home, Motor, Air	3%	2%
Special interest meetings eg. Sporting Club	2%	2%
Other special events	13%	10%
Tennis/ squash	5%	3%
Golf	5%	4%
Snow Skiing,Snowboarding	2%	2%
Bike riding	4%	3%
Horse riding/ trail riding	2%	1%
Playing Other sports	3%	2%
Fishing/ hunting	6%	10%
Bushwalking	17%	14%
Surfing/ swimming	29%	25%
Sailing	2%	2%
BASE	**(N=5,282)**	**(N=29,053)**

	CITY RESORT	ALL TRAVELLERS
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS (CONTINUED)		
Water Skiing	1%	1%
Other adventure activities eg. Rock Climbing, Bungee jumping	5%	2%
Other outdoor activities	23%	17%
Museums	33%	15%
Art Galleries	24%	10%
Theme/ entertainment parks eg. Disneyland, Sovereign Hill, Movie World, Dream World, Luna Park	19%	9%
Gardens/ Parks	38%	18%
Zoo/ sanctuary/ animal parks	21%	11%
Historical places	45%	21%
Wineries/ vineyards	16%	9%
Country/ wildlife/ scenery	38%	23%
Wilderness	18%	10%
National parks,Forests	34%	23%
Cities	80%	20%
Other sightseeing	50%	30%
Rest & relaxation	67%	57%
Meet & mix with other people	38%	25%
Beach holiday	24%	22%
Cruise on a ship	6%	2%
Luxurious/ comfortable holiday	31%	7%
Package tour	4%	2%
Backpacking	4%	2%
Nature holiday eg. camping	4%	5%
Living with or experiencing local culture	16%	6%
A real ecotourism experience	2%	1%
Health resort/spa holiday	3%	1%
Other particular holiday experience	20%	13%
Total gave a type of activity	100%	91%
BASE	**(N=5,282)**	**(N=29,053)**

8.6 Touring Enthusiast Segment

There are 1.8 million people within the Touring Enthusiast segment. They are generally older (above 35) and are more likely to belong to the upper socio-economic groups. Touring Enthusiasts have a preference for travel outside of big cities, being more attracted to nature-based tourism. Travel details are typically organised independently for themselves or family and friends. Compared to all travellers, the Touring Enthusiast Segment are more likely to entertain, and are confident in their financial position.

Compared to all travellers, the Touring Enthusiast segment are more likely to read the national newspapers and a range of magazine types including Motoring Club, Home and Lifestyle and Business Financial or Airline magazines.

Friends and relatives are an important draw-card to this market, and they tend to engage in activities connected with those groups. There is also a tendency to repeat visit a destination, often associated with having friends and /or relatives situated there. Visiting nature-based attractions, mixing with other people and a relaxing holiday are all important to this segment.

8.6.1 Demographic Profile

Compared with all travellers, the Touring Enthusiast Segment has an older age profile with almost three-quarters over 35. They are more likely to belong to the upper socio-economic groups. Household income levels are higher for this segment than for travellers in general (CAD$61,421 cf CAD$57,321).

Table 35: Demographic Characteristics of the Touring Enthusiast Segment

	TOURING ENTHUSIAST	ALL TRAVELLERS
SEX		
Men	46%	48%
Women	54%	52%
AGE		
14-17	3%	6%
18-24	8%	12%
25-34	18%	20%
35-49	30%	28%
50-64	29%	23%
65 and Over	12%	11%
MARITAL STATUS		
Married/De Facto	76%	65%
Single	24%	35%
SOCIO-ECONOMIC SCALE		
AB Quintile	29%	24%
C Quintile	24%	22%
D Quintile	20%	20%
E Quintile	15%	18%
FG Quintile	12%	15%
HOUSEHOLD LIFE-CYCLE		
Young Singles	8%	11%
Young Couples	9%	8%
Young Parents	23%	25%
Mid-Life Families	12%	12%
Mid-Life Households	34%	31%
Older Households	14%	13%

	TOURING ENTHUSIAST	ALL TRAVELLERS
ROY MORGAN VALUES SEGMENTS*		
Basic Needs	1%	2%
Fairer Deal	2%	4%
Traditional Family Life	22%	19%
Conventional Family Life	8%	8%
'Look At Me'	6%	11%
Something Better	6%	7%
Real Conservatism	5%	4%
Young Optimism	7%	9%
Visible Achievement	24%	20%
Socially Aware	20%	16%
EDUCATION LEVEL		
Primary School	2%	2%
Some Secondary/Tech.	13%	17%
Intermediate/Form 4/Year 10	14%	14%
5th form/Leaving/Year 11	6%	7%
Finished Tech./Matric/HSC/Year 12	17%	18%
Some/ Now at University	11%	11%
Have Diploma or Degree	37%	31%
OCCUPATION		
Professional/Manager	19%	17%
Farm Owner	1%	1%
White Collar Workers	26%	25%
Skilled Workers	7%	7%
Others (incl. Semi/Unskilled)	10%	12%
Home Duties	10%	9%
Don't Work	2%	2%
Looking for Full Time work	2%	3%
Looking for Part Time Work	1%	2%
Retired	18%	15%
Students	4%	7%

* Developed in conjunction with Colin Benjamin of The Horizons Network

	Touring enthusiast	All travellers
REGION		
Capital Cities	59%	63%
Country Areas	41%	37%
STATES		
N.S.W.	38%	36%
Victoria	24%	26%
Queensland	19%	18%
South Australia	7%	8%
Western Australia	9%	10%
Tasmania	2%	2%
HOUSEHOLD INCOME		
Average per annum	CAD$61,421	CAD$57,321
Base	**(n=6002)**	**(n=35,643)**

8.6.2 Attitudinal Profile

Compared to all travellers, the Touring Enthusiast Segment are more likely to be involved in planning their own holidays, hence their preference for unplanned holidays outside of the big cities.

Table 36: Holiday Attitudes of the Touring Enthusiast Segment

	TOURING ENTHUSIAST	ALL TRAVELLERS
HOLIDAY ATTITUDES		
More likely to agree:		
I sometimes organise holidays on behalf of my family and friends	31%	27%
I usually book and arrange all my holiday travel details myself	74%	64%
I like to go away on weekends	60%	57%
I'd like to holiday where I can experience the local culture	74%	70%
I like to take my holidays away from crowds	77%	73%
I prefer to holiday where I can see nature or be in a natural setting	78%	73%
I'm always very active on holidays	48%	46%
I like to take holidays within Australia	90%	87%
Less likely to agree:		
For my next holiday, I'd really like a total ecotourism experience	19%	19%
I avoid staying at accommodation that does not have genuine environmental policies	16%	17%
On holidays I like to do as little as possible	40%	45%
It only feels like a holiday if I leave Australia	3%	5%
I prefer the bright lights and big cities when I travel	10%	15%
I usually leave holiday arrangements to someone else	13%	21%
I enjoy holidays where everything is organised for you	12%	23%
BASE	**(N=6,002)**	**(N=35,643)**

The Touring Enthusiast segment was at least 10% more likely than travellers in general to agree with 9 of the attitudinal statements measured on Roy Morgan Single Source. (Out of over 150 attitudinal statements measured).

Feeling financially stable is something they agree to. This may bring context to why they are not afraid to take an unplanned holiday, as this cannot be totally fixed in price. Touring enthusiasts also enjoy drinking alcohol in a pub or with meals.

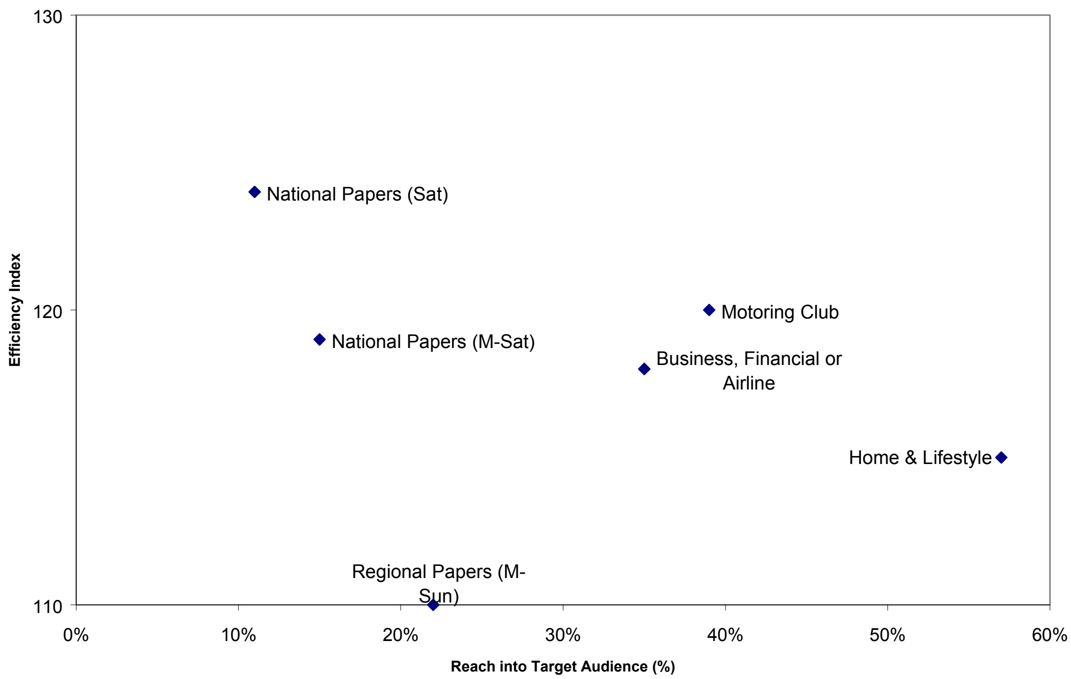
Table 37: Distinctive Attitudes of the Touring Enthusiast Segment

	TOURING ENTHUSIAST	ALL TRAVELLERS
ATTITUDES		
At least 10% more likely to agree:		
I feel financially stable at the moment	67%	60%
I like to entertain spontaneously	57%	51%
I drink more wine now than I used to (respondents 18+)	41%	37%
I like to drink wine with my meals	40%	33%
I don't like drinking in pubs (drinkers 18+) (from Jul00)	38%	34%
I always read the business section of the newspaper	30%	27%
BASE	**(N=6,002)**	**(N=35,643)**

8.6.3 Media Usage

Compared to all travellers, the Touring Enthusiast segment are more likely to read the national newspapers and a range of magazine types including Motoring Club, Home and Lifestyle and Business Financial or Airline magazines.

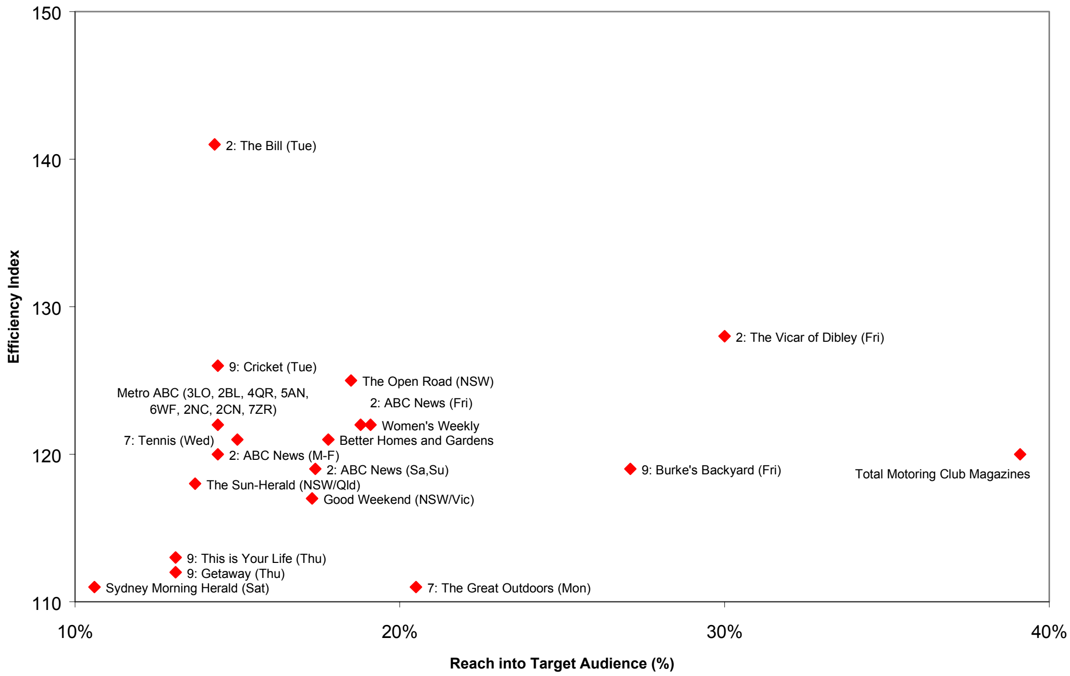
Figure 27: High-Efficiency, High-Reach Media Types for the Touring Enthusiast Segment



Base: All travellers (n=35,643)
See Appendix (p.119) for an explanation on how to interpret this graph

From the general media types highlighted on the previous page, the chart below shows the specific publications and programs that are most effective.

Figure 28: High-Efficiency, High-Reach Publications and Programs for the Touring Enthusiast Segment



Base: All travellers (n=35,643)
See Appendix (p.119) for an explanation on how to interpret this graph

8.6.4 Marketing Funnel

In terms of the key 'Marketing Funnel' indicators for Canada, the Touring Enthusiast segment performed very similarly to travellers generally. The intention for repeat visitation seems to be lower among this segment, suggesting that this group would consider Canada as a destination, but not necessarily decide to travel there.

Table 38: Marketing Funnel for the Touring Enthusiast segment

	TOURING ENTHUSIAST	ALL TRAVELLERS
MARKETING FUNNEL FOR CANADA		
Awareness	23%	20%
Preference	9%	9%
Intention	2%	2%
Visitation	2%	1%
Attrition*	86%	83%
Re-visit potential: Preference**	38%	32%
Re-visit potential: Intention***	7%	12%
BASE	**(N=6,002)**	**(N=32,643)**

* *Among those who would like to visit Canada in the next 2 years (ie Preferrers), the percentage who do not intend visiting on their next trip.*

** *Among those who have visited Canada in the last 12 months, the percentage who would like to visit again in the next 2 years.*

*** *Among those who have visited Canada in the last 12 months, the percentage who intend visiting on their next trip.*

8.6.5 Competitive Context

Canada was the 4th most preferred destination (equal with Italy) for the City Resort segment after United Kingdom, New Zealand and the United States which make up Australia's key outbound markets.

Table 39: Top 20 Preferred Overseas Destinations for the City Resort segment

	CITY RESORT
PREFERRED OVERSEAS DESTINATIONS	
United Kingdom	16%
New Zealand	15%
United States	12%
Canada	9%
Italy	9%
France	8%
Scotland	7%
Hawaii	6%
Republic of Ireland	6%
Bali	5%
Greece	5%
Scandinavia, Finland, Sweden, Denmark, Norway	5%
Fiji	4%
Switzerland/ Austria	4%
Spain/ Portugal	4%
Thailand	4%
Mexico, Central America, South America	3%
Germany	3%
Egypt	3%
Russia, Poland, Hungary, other Eastern Europe	3%
BASE	**(N=6,002)**

8.6.6 Holiday Behaviour

The tables below summarise the behaviour of the Touring Enthusiast segment on their last holiday of 3 or more nights including: transport, accommodation, travel party, information sources, booking methods, spend and duration of trip.

Table 40A: Touring Enthusiast segment: Transport on last holiday of 3 or more nights

	TOURING ENTHUSIAST	ALL TRAVELLERS
TOTAL NUMBER OF NIGHTS AWAY ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average (Nights)	22	14
SPEND PER PERSON PER NIGHT ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Average	$83	$100
MODES OF TRANSPORT USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Aeroplane	37%	33%
Own car or 4WD	63%	48%
Friends/relatives car or 4WD	24%	15%
Hire car or 4WD	21%	10%
Caravan/ Campervan	10%	4%
Bus/ Coach	14%	14%
Train	14%	11%
Cruise ship	2%	2%
Boat/Ferry/Other boat	13%	8%
Motorbike	1%	1%
Bicycle	2%	1%
Some other	3%	0
Total gave a mode of transport	100%	1
BASE	**(N=5,282)**	**(N=29,053)**

Table 40B: Touring Enthusiast segment: Accommodation on last holiday of 3 or more nights

	TOURING ENTHUSIAST	ALL TRAVELLERS
TYPES OF ACCOMMODATION USED ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Own holiday house, flat	5%	4%
Friends/Relatives home	50%	40%
Rented fully self-contained flat, unit, etc	15%	12%
Rented serviced apartment	6%	4%
Rented house	3%	3%
Luxury hotel or resort: 5 star	6%	6%
4 star hotel or resort	12%	11%
Standard hotel/motel or resort	22%	16%
Bed & Breakfast, Host farm	6%	3%
Youth hostel or backpackers	3%	2%
Caravan	11%	6%
Tent/camping	10%	7%
Cabin	9%	6%
Boat/House-boat/Ship	2%	2%
Some other	2%	2%
Total gave a type of accommodation used on last long trip	97%	89%
BASE	**(N=6,002)**	**(N=29,053)**

Table 40C: Touring Enthusiast segment: Information sources on last holiday of 3 or more nights

	TOURING ENTHUSIAST	ALL TRAVELLERS
PLACES WHICH HELPED IN CHOOSING LAST HOLIDAY DESTINATION OF 3 OR MORE NIGHTS		
Travel Agent	20%	18%
Airline	4%	4%
State Tourism Authority/ Government Travel Centre	9%	5%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	13%	8%
Tour Operator	2%	2%
TV advertising	1%	1%
TV program (eg.Lifestyle or Travel show)	3%	2%
Newspaper advertising	2%	3%
Newspaper articles	2%	1%
Magazine advertising	1%	1%
Magazine articles	2%	1%
Brochures	15%	10%
Travel or guide books	16%	10%
Friends or relatives who had visited the destination	17%	12%
Friends or relatives who live at the destination	20%	14%
I had been there before	28%	20%
Internet	13%	10%
Loyalty programme	1%	1%
Some other	4%	4%
Total had help in choosing destination of last long trip	77%	67%
I did not obtain any information	18%	21%
BASE	**(N=6,002)**	**(N=29,053)**

Table 40D: Touring Enthusiast segment: Booking methods on last holiday of 3 or more nights

	TOURING ENTHUSIAST	ALL TRAVELLERS
HOW LAST HOLIDAY OF 3 OR MORE NIGHTS WAS BOOKED		
Travel Agent	24%	23%
Airline	11%	9%
Tour Operator	2%	2%
State Tourism Authority/ Government Travel Centre	2%	2%
Motoring Club (e.g RACV, RACQ, NRMA, etc)	2%	1%
Shipping Line	1%	0%
Internet	9%	8%
Booked accommodation directly	28%	24%
Booked hire car directly	6%	3%
Booked other travel directly	4%	3%
Some other	6%	6%
Can't say method used	0%	1%
Total booked last long trip	67%	63%
I did not book my last trip	28%	26%
BASE	**(N=6,002)**	**(N=29,053)**

Table 40E: Touring Enthusiast segment: Activities on last holiday of 3 or more nights

	TOURING ENTHUSIAST	ALL TRAVELLERS
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS		
Visiting friends or relatives	61%	49%
Shopping	43%	36%
Restaurants/ international food/ wine	34%	28%
Cinema/ movies	14%	10%
Musical performances/ concerts	5%	4%
Theatre going	2%	2%
Disco/ nightlife	5%	5%
Visited a Casino	6%	5%
Played poker machines	8%	7%
Informal cards eg. Bridge,Poker,etc	3%	2%
Video Arcade eg. Timezone,Laserforce	1%	2%
Other social activities	45%	42%
Horse racing eg. Melbourne Cup	1%	1%
Football/ Rugby/ Cricket eg. Football Final, Rugby Test	2%	1%
Motor racing eg. Grand Prix, Indy, Bathurst	1%	1%
Other spectator sporting events eg. Golf,Tennis	1%	1%
Arts Festival, Cultural Event	4%	3%
Exhibition, Show eg. Home, Motor, Air	2%	2%
Special interest meetings eg. Sporting Club	1%	2%
Other special events	10%	10%
Tennis/ squash	4%	3%
Golf	6%	4%
Snow Skiing,Snowboarding	2%	2%
Bike riding	4%	3%
Horse riding/ trail riding	1%	1%
Playing Other sports	2%	2%
Fishing/ hunting	13%	10%
Bushwalking	22%	14%
Surfing/ swimming	30%	25%
Sailing	2%	2%
BASE	**(N=6,002)**	**(N=29,053)**

	Touring Enthusiast	All Travellers
ACTIVITIES DONE ON LAST HOLIDAY OF 3 OR MORE NIGHTS (CONTINUED)		
Water Skiing	1%	1%
Other adventure activities eg. Rock Climbing, Bungee jumping	3%	2%
Other outdoor activities	19%	17%
Museums	22%	15%
Art Galleries	15%	10%
Theme/ entertainment parks eg. Disneyland, Sovereign Hill, Movie World, Dream World, Luna Park	13%	9%
Gardens/ Parks	24%	18%
Zoo/ sanctuary/ animal parks	15%	11%
Historical places	30%	21%
Wineries/ vineyards	13%	9%
Country/ wildlife/ scenery	35%	23%
Wilderness	16%	10%
National parks,Forests	35%	23%
Cities	29%	20%
Other sightseeing	38%	30%
Rest & relaxation	65%	57%
Meet & mix with other people	31%	25%
Beach holiday	27%	22%
Cruise on a ship	3%	2%
Luxurious/ comfortable holiday	7%	7%
Package tour	2%	2%
Backpacking	2%	2%
Nature holiday eg. camping	8%	5%
Living with or experiencing local culture	8%	6%
A real ecotourism experience	2%	1%
Health resort/spa holiday	1%	1%
Other particular holiday experience	16%	13%
Total gave a type of activity	97%	91%
Base	**(n=6,002)**	**(n=29,053)**

9. Air Travel in the Australian Market

This chapter examines air travel behaviour within the Australian and Overseas Market.

9.1 Overview of Market

The Australian airline industry has stabilised itself somewhat after a turbulent period with the collapse of Ansett (domestic airline carrier) in 2001 almost exactly coinciding with the September 11 attacks. The terrorist bombing of the Sari Club in Bali, November 2002 has also had an impact on outbound air travel.

9.2 International Air Travel

Qantas is the main carrier used for both Leisure and Business Travel, followed by Singapore and Air New Zealand.

Table 41: Airline Used – Overseas Travel

	LEISURE	BUSINESS
AIRLINE TRAVELLED WITH ON LAST TRIP IN THE LAST 12 MONTHS:		
Air Canada (was Canadian Airlines)	1.5%	0.4%
Air New Zealand	$\boxed{5.1\%}$	0.7%
Air Pacific	1.3%	0.2%
American Airlines	2.0%	0.2%
Ansett	3.6%	0.2%
British Airways	$\boxed{4.5\%}$	0.6%
Cathay Pacific	1.5%	0.5%
Emirates Airlines	0.8%	0.2%
Freedom Air	0.9%	0.0%
Garuda	2.3%	0.2%
Lufthansa	1.6%	0.1%
Malaysia Airlines	3.0%	0.8%
Qantas	$\boxed{27.8\%}$	$\boxed{6.5\%}$
SAS (Scandinavian Airlines)	0.6%	0.1%
Singapore Airlines	$\boxed{6.6\%}$	$\boxed{1.6\%}$
Thai Airways	3.4%	0.4%
United	2.1%	0.6%
Virgin Atlantic	0.1%	0.0%
Other Airlines	8.2%	$\boxed{1.5\%}$
BASE	**(N=5,261)**	**(N=5,261)**

Base: Travelled by air outside Australia in the last 12 months
Roy Morgan Single Source July 2001 – December 2002 (n=5,261)

Appendix 1

Interpreting Media Usage

The Efficiency Index is a measure of how likely, compared to the total population, the target group is to have consumed a given form of media.

Reach into Target Audience is the percentage of the target group that have consumed a form of media during the time period.

The ideal outcome is when the media piece sits in the top right corner of the figure. This is the point at which the media piece has been consumed by a high proportion of the target audience, and has been viewed by a greater proportion of the target audience compared to the total population.

Only an efficiency index of 10% or higher has been reported.

Roy Morgan Values Segments[1]

The Roy Morgan Values Segments[1] provide a segmentation of the patterns of thinking and responses of people that are drivers of change and choice. We use demographics to know who our respondents are in terms of their gender, age group, socio-demographic status, level of education and so on. Values Segments[1] provide a second dimension - depth of understanding - that helps us explore motivations and reasons for purchase and the choices people make.

Roy Morgan Values Segments[1] provide insight into:

- How people think
- What motivates them to act
- How they perceive themselves (at work/at home)
- The self image they want to project
- What they seek in life and their aspirations
- What type of communication is likely to motivate them
- What channels of communication can effectively reach them

[1] Developed in conjunction with Colin Benjamin of The Horizons Network

The Values Segments[1] are based on people's pattern of responses to six distinct dimensions of behaviour. The six dimensions are:

1. Quality - how high or low are the expectations of quality
2. Individualism - how much emphasis on "I" versus "We"
3. Life Satisfaction - high or low levels of satisfaction with life
4. Innovation - level of attraction to new things and ideas
5. Conservatism - traditional versus progressive social attitudes
6. Price - willingness to pay high or low prices per unit

A short description of the ten Values Segments[1], including travel behaviour, is outlined on the following pages.

BASIC NEEDS
(approximately 3% of the Australian population)

This pattern of thinking is usually associated with people who are retired, pensioners or people on social security payments, who have an active community focus to their lives and with people on sickness benefits or worker's compensation who have to reduce their expectations in line with their income.

Basic Needs have a low incidence of holiday travel. When they do travel, they tend to stay with friends or relatives, or use accommodation within caravan parks. This segment is also more likely to use trains as a mode of transport. Whilst the primary purpose for travel is to visit friends or relatives, they also like to gamble (play pokies and bingo) while on holiday. The low discretionary income of this segment is reflected in the low overall cost of their holidays and greater use of package tours.

A FAIRER DEAL
(approximately 5% of the Australian population)

This pattern of thinking is generally found amongst unskilled and semi-skilled workers who left school to start learning from friends who share blue denim values. The spectre of unemployment, family pressures, the day to day struggle with rent and such basic worries as keeping wheels on the road - all lead to a feeling of getting a raw deal out of life. These people are most likely to have a low level of satisfaction with their standard of living and life as a whole.

This segment takes fewer holidays than average. They were more likely to stay with friends and relatives, go camping, or use cabin accommodation. This segment was more likely to use buses and trains on holidays. They like nature-based holidays, going to pubs and nightlife along with visiting friends or relatives.

TRADITIONAL FAMILY LIFE
(approximately 20% of the Australian population)

This pattern of thinking personifies middle-aging Australia-home owners with a relatively stable income that meets the needs of a smaller household from which the young couples have moved out to start their own families and lifestyles. Energies revolve around them becoming grandparents or getting children home for visits or at least to keep in touch. Health and spirituality dominates sense of meaning and purpose in life and being well-respected in the community is very important.

People from the Traditional Family Life segment are keen holiday tourers, which is reflected in the high use of caravans and campervans. A planned itinerary is a priority, hence the greater use of package tours and bookings through tour operators. They tend to stay in comfortable but good value accommodation, such as standard hotels and motels - they don't want any surprises. Sightseeing is an important aspect of their holiday experience, with a greater tendency to visit museums, art galleries, historical places, and wineries. Visiting friends or relatives is also an important aspect of the TFL's holiday experience.

CONVENTIONAL FAMILY LIFE
(approximately 9% of the Australian population)

This pattern of thinking is most closely associated with younger and mid-life families devoting all their time and efforts into building a "home" to give children the opportunities they deserve. Basic living standards are all important to them as they strive to improve their home, enjoy family life and have enough time to keep in touch with their parents and friends. Life revolves around the need to live within one income whilst meeting never ending demands for more time and money to satisfy family needs. A part-time job is often required to pay for the extras and the children's education or to save for a family holiday.

This segment takes fewer holidays than average, and tend to travel intrastate in order to meet the family budget. They stay in rented accommodation with the family, and generally use the family car while on holidays. This segment participates in outdoor holiday activities, such as fishing, swimming and surfing, bike riding and horse riding. Fitting with the family theme, they are also more likely to visit entertainment and theme parks.

LOOK AT ME
(approximately 12% of the Australian population)

This pattern of thinking is associated with active, unsophisticated, somewhat self-centred and peer-driven behaviour that sees success as a kind of game, not to be measured by family standards. This is the "decibel generation" that lives in McDonalds, drinks Pepsi, burns up money, spends hours watching commercial TV and can't wait to be somewhere else.

Look At Me takes an average number of holidays, but lack the necessary budget to travel interstate. Their low budget is reflected in higher use of holiday houses, camping and cabin accommodation and youth hostels and backpackers. Due to the general age of the segment, they use buses, trains, and friends'/relatives' cars to reach their destination. They participate in social activities, such as cinemas and nightlife, and outdoor activities, particularly adventure activities like snow-skiing, water-skiing, and sailing. Additionally, this segment is likely to visit theme parks.

SOMETHING BETTER
(approximately 8% of the Australian population)

This pattern of thinking is associated with people who are very competitive, seeking to clinch a bigger, better deal that will develop a little bit more to help pay off an excessive mortgage on the new family home, extensive debts and an elaborate effort to be more powerful. Planning for a move to a better neighbourhood with better schools for the kids often requires long hours, a search for overtime or commissions and a high pressure work and family environment.

Something Better takes a less than average number of holidays, and tend to use youth hostel and backpacker accommodation and camping. They like to gamble, with a tendency to visit casinos and play poker machines. Also, this segment participates in outdoor activities such as fishing, sailing, swimming and other beach activities.

REAL CONSERVATISM
(approximately 4% of the Australian population)

This pattern of thinking is mostly associated with people who are mature and mid-career, holding conservative, social, moral and ethical values seeking a disciplined, ordered society which is safe and predictable. These generally authoritarian, blue-chip investments and business-oriented individuals feel very much in control of their own lives. A super cautious approach to change, new things and ideas, often reflects a rural background of property, asset rich but income poor status, or an urban view of self as a member of the establishment.

Real Conservatism travels on holiday with average frequency. They tend to travel with their partner, and are more likely to travel with tour groups. This segment has a tendency to stay in rented accommodation or at their own holiday property. In terms of activities, they visit historical places and play the pokies.

YOUNG OPTIMISM
(approximately 8% of the Australian population)

This pattern of thinking is usually associated with young professionals, technocrats and students whose thoughts are focused on achieving a good career, overseas travel and generally seeking opportunities to improve prospects in life, have a sense of fulfilment and a chance to enjoy an outgoing lifestyle. This pattern of behaviour is most often found in the inner city cyber-cafes, apartments and specialty shops that offer a cosmopolitan lifestyle.

Young Optimism travels frequently. They are the segment most likely to have holidayed overseas, reflecting their need to seek new experiences and adventure. The tendency to travel overseas is also reflected in their high use of commercial transport, such as airlines, cruise ships, buses and trains. They tend to travel alone or with a small group of friends, and are likely to stay in budget backpacker and hostel accommodation. While on holiday they tend to participate in social activities such as shopping, attend theatre and musical performances, and enjoy nightlife. This segment also attends arts festivals, participate in sports (such as skiing, bike riding, and adventure activities) and prefer holidays in cities.

VISIBLE ACHIEVEMENT
(approximately 17% of the Australian population)

This pattern of thinking is associated with the proof of having made it up the seemingly never ending social ladder, demonstrated by the swimming pool, the Jaguar or Mercedes and an exclusive private school education for their children. Personal recognition, higher incomes, job satisfaction and other tangible rewards of success such as travel, recreation and high quality homes, vehicles, holiday locations provide the very best of visible good living.

Visible Achievement travels frequently and spends big on holiday. As with other purchases, they look for quality and value for money in their holidays. For those with family, the holiday is a chance to spend time together doing activities with the children. They also enjoy holidays that provide the opportunity to play golf and tennis. This segment generally stays in luxury hotels, serviced apartments, and bed and breakfast accommodation.

SOCIALLY AWARE
(approximately 14% of the Australian population)

This pattern of thinking is usually associated with the highest socio-economic group in the community and is most often associated with public servants, pressure groups and politicians of all political colours. These “insatiable information vacuum cleaners” are addicted to finding out, or trying, anything that’s new or different. They don’t make decisions lightly, argue the facts and figures - but end up buying the latest, and the brightest, anyway - just because they have to have it.

Socially Aware the highest frequency of travel amongst the Values Segments, and spends big on holidays. Frequency of overseas travel is higher than that among other segments. They travel to destinations such as Tasmania and the Northern Territory that offer the opportunity to explore and have new and different experiences. This segment enjoys planning the holiday and value flexibility, hence they book transport, accommodation and other services directly with the service provider. They enjoy boutique accommodation such as bed and breakfasts and luxury hotels. On holiday, they like to experience cultural activities, such as musical and theatre performances, and enjoy restaurants, arts festivals, wineries galleries and museums, outdoor and nature activities.