

WESTERN AUSTRALIA'S DOMESTIC TRIP SEGMENTATION



GOVERNMENT OF
WESTERN AUSTRALIA

Tourism
WESTERN AUSTRALIA

WESTERN
AUSTRALIA
WALKING ON A DREAM

♀ NINGALOO REEF | NYINGGULU



OVERVIEW

BACKGROUND

In 2022, Tourism WA commissioned Roy Morgan to conduct a segmentation study based on trips taken by Australians.

METHODOLOGY

Data was collected from a sample of 3,500 Australian travelers aged 18+. Respondents were asked detailed information on up to three trips, including trip activities, reasons and motivations for trip, and destination choice factors. In total, details on 6,500 trips were collected.

THE SEGMENTS

The segmentation model divided the domestic trips taken by Australians into six segments. An additional visiting friends and relatives (VFR) segment was also identified, but not included because of its low value as a targetable tourism segment. This segment has been excluded in comparisons between segments.

SEGMENT OVERLAP

There is considerable overlap between segments as domestic travellers take a number of different trip types



PRIORITY SEGMENTS

Three of these six segments have been selected by Tourism WA as priority segments for interstate marketing:

- Premium Nature
- Luxe Culture
- City Social

UNDERSTANDING WHO TAKES EACH TRIP TYPE

The following pages provide detailed profiling information on who takes each trip.

If you have any questions please contact research@westernaustralia.com

PREMIUM NATURE

“EXHILARATED...AWESTRUCK. VERY CONNECTED TO NATURE. ISOLATED FROM CIVILIZATION IN A GOOD WAY.”

♀ WYLIE BAY, ESPERANCE

A PREMIUM NATURE TRIP IS...

A high-activity immersion in untouched nature offering unique, premium experiences.

| | INTERSTATE IN AUS | INTERSTATE IN WA |
|--------------------------|-------------------|------------------|
| AVG. SPEND PP, PER NIGHT | \$341 ▲ | \$393 ▲ |
| % TRIPS OF 3+ NIGHTS | 94% | 54% |
| % OF TRIPS TO/IN WA | 15% ▲ | NA |




DESTINATION CHOICE

- Adventure
- Unique wildlife ▲
- Authentic Aboriginal experiences ▲
- Sustainable tourism ▲
- An unusual place, not mainstream ▲
- Chance to immerse in nature ▲
- Unique experiences you can't do anywhere else ▲

INTERSTATE BARRIERS TO VISITING WESTERN AUSTRALIA

Cost and distance are top barriers, in line with all travellers, though positive perceptions of Western Australia are the highest among Premium Nature trip takers

REASON FOR TRIP




-  To get away and relax
-  For adventure and excitement ▲
-  To spend time with my partner or family

A Premium Nature holiday offers an opportunity for immersion in nature, peppered with the types of rare experiences that are worth both the time and money required to access them. This trip is all about transcendent travel experiences that create powerful memories.




Getting off the beaten track – no matter how challenging or remote in pursuit of something truly unique - is a defining feature of this trip type. Physical challenge is welcome, as long as there's a touch of luxury and comfort to return at the end of the day.

PLANNING & BOOKING

PLANNING ENABLERS

-  Internet ▲
-  Travel organization*
-  Friends and relatives

BOOKING METHOD

-  Internet via phone (56%) ▲
-  Internet via computer (28%)
-  Phone call (16%)

*includes travel agent, airline, travel centre

WHO TAKES A PREMIUM NATURE TRIP?

- Couples without children, groups of friends
- Passionate about travel, willing to invest in transcendent experiences
- Interested in eco-tourism and Aboriginal culture
- Helix Communities: 100's Leading Lifestyles and 200s Metrotechs

The Premium Nature tripper is affluent, educated and socially aware. This seasoned traveller views travel as an opportunity to learn and grow from the unique experiences they seek out. They have a deep affinity and awe for nature, and are driven by a desire to discover something new about the environment and culture they've immersed themselves in.






DIFFERENCES BETWEEN SEGMENTS ARE INDICATED BY ARROWS (▲ SIGNIFICANTLY HIGHER, ▼ SIGNIFICANTLY LOWER)

AGE OF TRAVELLER

- 18-34
- 35-49
- 50-64
- 65+

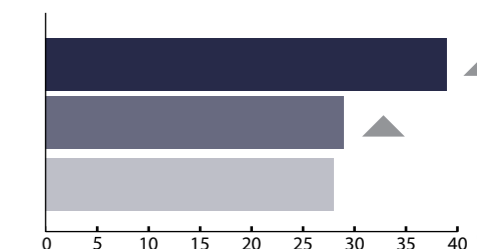


TOP ACTIVITIES

-  National Parks or forests ▲
-  Wilderness ▲
-  Bushwalking ▲
-  Aboriginal cultural experiences ▲
-  Roadtrip (intrastate only) ▲

TOP ACCOMMODATION

- RENTED HOUSE
- STANDARD HOTEL/MOTEL
- LUXURY HOTEL/RESORT



♀ BROOME | RUBIBI

LUXE CULTURE



“YOU’RE DOING WINE AND FOOD TOURS, HAVING EVERYTHING BROUGHT TO YOU. IT’S A VERY RELAXING EXPERIENCE, IT FEELS LIKE YOU’RE IN LUXURY TO HAVE ALL THESE THINGS AROUND YOU”

MARGARET RIVER REGION

A LUXE CULTURE TRIP IS...

A luxury escape staying at 4 or 5 star hotels and resorts, focusing on restaurants, shopping and arts/culture.

| | INTERSTATE IN AUS | INTRASTATE IN WA |
|--------------------------|-------------------|------------------|
| AVG. SPEND PP, PER NIGHT | \$239 | \$278 ▲ |
| % TRIPS OF 3+ NIGHTS | 87% | 42% |
| % OF TRIPS TO/IN WA | 3% | NA |

DESTINATION CHOICE

- Luxury accommodation and facilities ▲
- Vibrant city lifestyle and nightlife ▲
- Great historical / heritage attractions ▲
- Unique experiences I couldn't do anywhere else ▲
- Great food, wine and local produce ▲
- Easy to get to ▲

INTERSTATE BARRIERS TO VISITING WESTERN AUSTRALIA

Inconveniences such as difficulty getting between destinations and too many places to visit on one trip deter Luxe Culture trip takers from visiting Western Australia.

REASON FOR TRIP

- To get away and relax ▲
- To spend time with my partner or family ▲
- For a special trip e.g. anniversary
- For adventure and excitement ▲

Usually city based, a Luxe Culture holiday is high activity and all about splurging – on high end accommodation, eating out and the best cultural activities the destination has to offer, along with a sprinkling of nearby premium nature experiences high on the wow factor but not too strenuous.

Mostly taken interstate, this trip is often triggered by the celebration of a special event such as a honeymoon or birthday, so it's full of the type of unique experiences memories are made of.

PLANNING & BOOKING

PLANNING ENABLERS

- Internet
- Travel organization*
- Friends and relatives
- No information obtained ▲

BOOKING METHOD

- Internet via computer (55%) ▲
- Internet via phone (20%) ▲
- Phone call (19%)
- * includes travel agent, airline, travel centre

WHO TAKES A LUXE CULTURE TRIP?

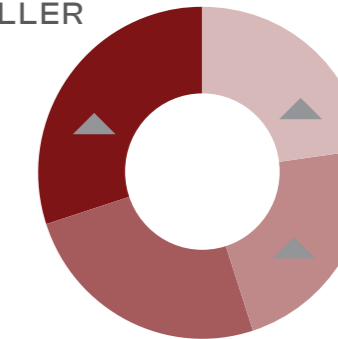
- Couples wanting to indulge
- Celebrating special events
- Food and wine lovers
- Interested in accessible premium nature experiences such as exploring pearl farm and wineries
- Helix Communities: 100's Leading Lifestyles and 200s Metrotechs

While a Luxe Culture escape is a mainstay for the affluent traveller, who likely takes this trip regularly, this kind of holiday is also taken by a more diverse mix of travellers, including those of average income for whom this trip is a special and rare event they have saved diligently for to celebrate a milestone in their lives.

DIFFERENCES BETWEEN SEGMENTS ARE INDICATED BY ARROWS (▲ SIGNIFICANTLY HIGHER, ▼ SIGNIFICANTLY LOWER)

AGE OF TRAVELLER

- 18-34
- 35-49
- 50-64
- 65+

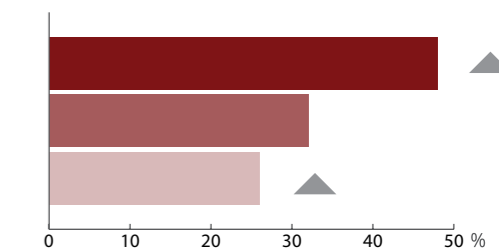


TOP ACTIVITIES

- Dining out ▲
- Shopping ▲
- Rest and relaxation ▲
- Gardens and parks
- Cities ▲

TOP ACCOMMODATION

- LUXURY HOTEL/RESORT
- RENTED HOUSE
- STANDARD HOTEL/MOTEL



PERTH CITY | BOORLOO



CITY SOCIAL

“ HAVE FUN WITH FRIENDS, LOOK FOR ALL THE INSTAGRAMMABLE SPOTS, CHECK OUT THE BARS AND CLUBS”

PERTH CITY | BOORLOO

A CITY SOCIAL TRIP IS...

Getting together with friends and having a good time, soaking up the nightlife and city energy.

| | INTERSTATE IN AUS | INTERSTATE IN WA |
|--------------------------|-------------------|------------------|
| AVG. SPEND PP, PER NIGHT | \$204 | \$185 |
| % TRIPS OF 3+ NIGHTS | 80% | 20% ▾ |
| % OF TRIPS TO/IN WA | 3% | NA |

DESTINATION CHOICE

- Major sporting events ▲
- Local festivals and events ▲
- Vibrant city lifestyle and nightlife
- Good package deal
- Great food, wine and local produce ▲

INTERSTATE BARRIERS TO VISITING WESTERN AUSTRALIA

As well as cost and distance, City Social trip takers just don't know enough about what to see and do in Western Australia.

REASON FOR TRIP

- To have fun ▲
- Attend a festival or sporting events ▲
- To spend time with friends ▲

A City Social trip is all about having fun with friends – eating out at buzz-worthy restaurants followed by long nights bar and club hopping.

Days are for recovery, hanging out with mates in shared accommodation, and venturing out occasionally for some not-too-strenuous exploration of the destination to find the most Instagrammable spots. Following an afternoon siesta, it all repeats again.

PLANNING & BOOKING

PLANNING ENABLERS

- Internet
- No information obtained ▲
- Friends and relatives
- Travel organization* ▲

BOOKING METHOD

- Internet via phone (49%) ▲
- No part of trip was booked (18%)
- Internet via computer (15%) ▲
- *includes travel agent, airline, travel centre

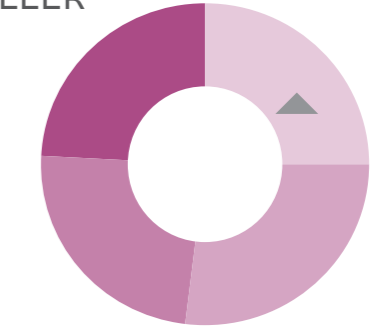
WHO TAKES A CITY SOCIAL TRIP?

- Younger people in groups who like to stay together in shared accommodation
- Seek out nightlife and energy of big cities
- Trip often triggered by attending a major sport or cultural event
- Helix Communities: 200s Metrotechs

While the typical City Social trip taker is young and carefree, you'll also find some mid-age 'young-at-heart' travellers taking this trip, embracing the opportunity to reunite with friends, re-acquaint themselves with the concept of 'nightlife' and have some high-octane fun for a few days away from the responsibilities of family.

AGE OF TRAVELLER

- 18-34
- 35-49
- 50-64
- 65+

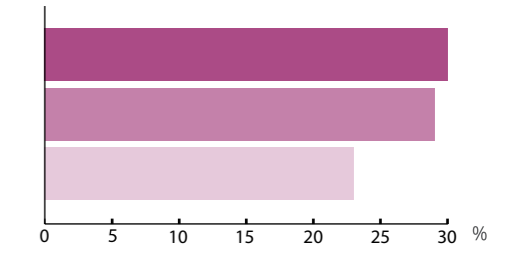


TOP ACTIVITIES

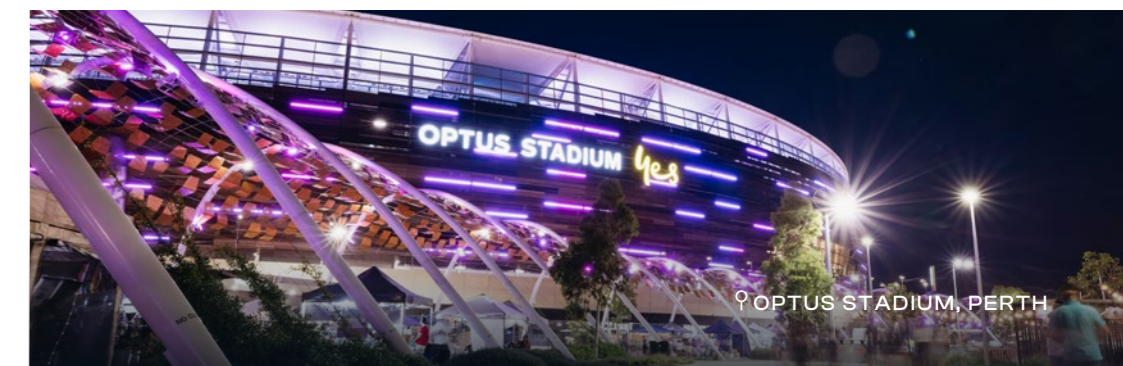
- Nightclubs, bars, nightlife ▲
- Musical performances, concerts
- Football, rugby, cricket ▲
- Visit a casino
- Theatre

TOP ACCOMMODATION

- RENTED HOUSE
- LUXURY HOTEL/RESORT
- STANDARD HOTEL/MOTEL



DIFFERENCES BETWEEN SEGMENTS ARE INDICATED BY ARROWS (▲ SIGNIFICANTLY HIGHER, ▾ SIGNIFICANTLY LOWER)



OPTUS STADIUM, PERTH

SIMPLE NATURE

A SIMPLE NATURE TRIP IS...

A holiday in nature to relax, escape distraction and reconnect to the simple things.

| | INTERSTATE IN AUS | INTERSTATE IN WA |
|--------------------------|-------------------|------------------|
| AVG. SPEND PP, PER NIGHT | \$169 ▼ | \$111 ▼ |
| % TRIPS OF 3+ NIGHTS | 83% | 55% ▲ |
| % OF TRIPS TO/IN WA | 5% | NA |

DESTINATION CHOICE

- Adventure and getting off the beaten track ▲
- Unique wildlife ▲
- Immersion in nature ▲
- Unspoilt natural beauty ▲
- Good for a road trip ▲
- Unique experiences

INTERSTATE BARRIERS TO VISITING WESTERN AUSTRALIA

Cost and distance are key barriers, in line with all travellers, but Simple Nature trip takers have very high positive perception of Western Australia.

REASON FOR TRIP

-  To get away and relax ▲
-  For adventure and excitement ▲
-  To spend time with my partner or family ▲
-  To have fun





"CAMPING IN SWAGS & TENTS... CAMPFIRES, GOING ON BUSH WALKS, HANGING OUT WITH FRIENDS. BEING IMMERSSED IN NATURE."

♀ BORANUP FOREST, MARGARET RIVER REGION




A Simple Nature holiday is about hitting the road and returning to the simple things close to nature. Waking up in the morning, zipping open the tent to endless fresh air and the feeling of dewy grass beneath your feet — surrounded by an awe-inspiring silence, broken only by the sound of birds chirping and water gushing gently down the river. Days are spent exploring walking tracks and nights are focused on reconnecting with friends and loved ones around the campfire, blissfully free from distractions.

PLANNING & BOOKING

PLANNING ENABLERS

-  Internet
-  Friends and relatives ▲
-  No information obtained
-  Travel organization* ▲

BOOKING METHOD

-  Internet via phone (36%) ▲
-  No part of trip was booked (28%) ▲
-  Internet via computer (28%) ▲
- *includes travel agent, airline, travel centre

WHO TAKES A SIMPLE NATURE TRIP?

- Families and groups of friends
- Those seeking immersion in nature
- Experience and adventure seekers
- Helix Communities: 400's Hearth & Homes and 200s Metrotechs

The Simple Nature trip taker is the typical Australian who loves nothing more than to escape the everyday for some time off the grid, getting back to the simple things in nature; a hike in the bush, some fishing and plenty of time to unwind, take things slow and spend some quality time with travel mates.

They're also up for adventure – exploring new places and wildlife, discovering new terrain.



DIFFERENCES BETWEEN SEGMENTS ARE INDICATED BY ARROWS (▲ SIGNIFICANTLY HIGHER, ▼ SIGNIFICANTLY LOWER)

AGE OF TRAVELLER

- 18-34
- 35-49
- 50-64
- 65+

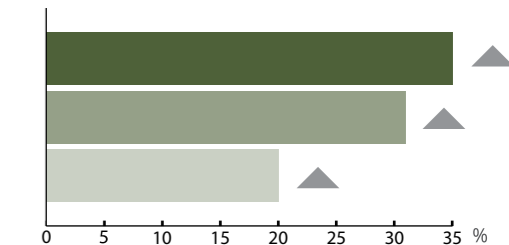


TOP ACTIVITIES

-  National Parks ▲
-  Wildlife and scenery ▲
-  Bushwalking ▲
-  Wilderness ▲
-  Gardens and parks ▲

TOP ACCOMMODATION

- CARAVAN/CAMPERVAN
- TENT/CABIN/BACKPACKERS
- RENTED HOUSE



♀ YANCHEP NATIONAL PARK

FAMILY TIME



“ WE GO AWAY WITH MY PARENTS EVERY YEAR. SPEND TIME RELAXING WITH EVERYBODY ON THE BEACH, WALKING WITH THE KIDS AROUND THE ROCK POOLS, PLAYING IN THE WAVES. MAKES YOU FEEL WARM AND HAPPY.”

♀ TWILIGHT BAY, ESPERANCE

A FAMILY TIME TRIP IS...

A family holiday on the coast returning to favourite destinations, and relaxing by the beach.

| | INTERSTATE IN AUS | INTRASTATE IN WA |
|--------------------------|-------------------|------------------|
| AVG. SPEND PP, PER NIGHT | \$203 | \$170 |
| % TRIPS OF 3+ NIGHTS | 57% ▾ | 59% ▲ |
| % OF TRIPS TO/IN WA | 4% | NA |

DESTINATION CHOICE

- Beaches where I could relax ▲
- Beaches where I could play and surf ▲
- Pristine coastlines and beaches ▲
- Activities I can do with the kids ▲
- A family friendly place ▲

INTERSTATE BARRIERS TO VISITING WESTERN AUSTRALIA

Familiar barriers of cost and distance, along with too many places to visit and being less kid friendly makes Western Australia less appealing to this trip taker.

REASON FOR TRIP

- To get away and relax ▲
 To spend time with friends
- To spend time with my partner or family ▲

Family Time holiday is all about fun in the sun with the kids. Often returning to favourite destinations, a Family Time trip is usually an annual summer holiday full of long, lazy days at the beach swimming, building sandcastles, wandering around rock pools and taking breathtaking coastal walks.

It also serves as a well-earned break from routine - plenty of sleep-ins with nothing more to worry about other than what to eat for lunch or where to go for dinner.

PLANNING & BOOKING

PLANNING ENABLERS

- Internet
- Friends and relatives ▲
- No information obtained
- Travel organization*

BOOKING METHOD

- Internet via phone (40%) ▲
- Internet via computer (24%)
- No part of trip was booked (22%)
- *includes travel agent, airline, travel centre

WHO TAKES A FAMILY TIME TRIP?

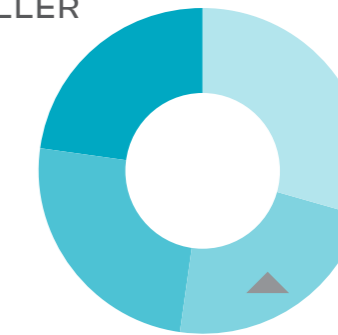
- Families with kids
- Seeking quality family time, relaxation and a break from routine
- Spend time swimming, watching dolphins and other beach-related activities
- Helix Communities: 100's Leading Lifestyles and 400's Hearth & Home

The Family Time trip taker is looking to rest and relax and spend some quality time with the kids — free from the distractions of everyday life and the unrelenting busyness of school and work routines.

You'll find a mix of intrastate travellers who prefer the convenience of jumping in the car and driving to their destination, along with the more intrepid Family Time traveller who has a larger budget and likes to venture further afield interstate to iconic and exotic beach locations, often in Queensland.

AGE OF TRAVELLER

- 18-34
- 35-49
- 50-64
- 65+

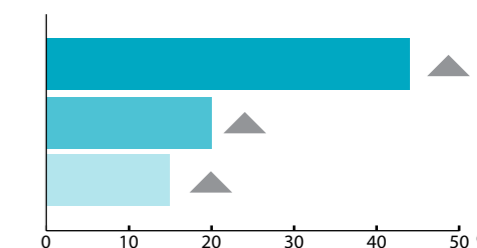


TOP ACTIVITIES

- Spending time on the beach ▲
- Dining out ▲
- Swimming or surfing ▲
- Shopping (intrastate only) ▲
- Rest and relaxation ▲

TOP ACCOMMODATION

- RENTED HOUSE
- LUXURY HOTEL/RESORT
- STANDARD HOTEL/MOTEL



DIFFERENCES BETWEEN SEGMENTS ARE INDICATED BY ARROWS (▲ SIGNIFICANTLY HIGHER, ▾ SIGNIFICANTLY LOWER)



♀ SCARBOROUGH BEACH, PERTH

RELAX & RECHARGE

A RELAX & RECHARGE TRIP IS...

A quick getaway in between longer holidays, focused on relaxing and spending quality time with partner.

| | INTERSTATE IN AUS | INTERSTATE IN WA |
|--------------------------|-------------------|------------------|
| AVG. SPEND PP, PER NIGHT | \$244 | \$213 |
| % TRIPS OF 3+ NIGHTS | 76% | 25% ▾ |
| % OF TRIPS TO/IN WA | 3% | NA |

DESTINATION CHOICE

- Suited my budget ▲
- Easy to get to ▲
- Great value for money ▲
- Never been there before ▲
- I got a good package deal ▲

INTERSTATE BARRIERS TO VISITING WESTERN AUSTRALIA

As well as cost and distance, Relax & Recharge trip takers just don't know enough about what to see and do in Western Australia.

REASON FOR TRIP

-  To get away and relax ▲
-  To spend time with my partner or family ▲





"YOU WANT TO RELAX AND UNWIND, SPEND SOME QUALITY TIME TOGETHER, YOU DON'T WANT TO BE RUSHING AROUND WITH TOO MUCH TO DO."

A Relax & Recharge trip is usually a brief, low-activity getaway taken without much planning ahead, mainly as an opportunity to recharge in between longer, more considered holidays.




As a result, the actual destination is not so important - it's really about what's convenient to get to and the availability of good but not too pricey accommodation which might be chosen purely because of a great package deal spotted just days in advance.

PLANNING & BOOKING

PLANNING ENABLERS

-  Internet
-  No information obtained ▲
-  Friends and relatives ▲
-  Travel organization*

BOOKING METHOD

-  Internet via phone (42%) ▲
-  No part of trip was booked (20%)
-  Internet via computer (20%)

*includes travel agent, airline, travel centre

WHO TAKES A RELAX & RECHARGE TRIP?

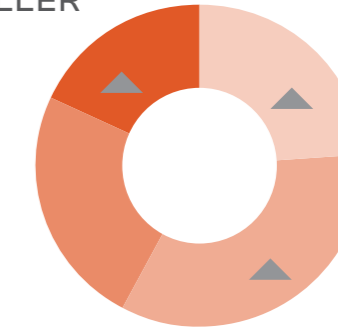
- Couples without children
- Choice of destination is not very important to them - purpose of the trip is to relax
- Sometimes triggered by attending an event, such as a wedding
- Helix Communities: 100's Leading Lifestyles and 200s Metrotechs

As the biggest trip segment, a mix of all travellers - including all ages and incomes - takes a Rest & Recharge trip in between longer holidays, as can be seen in the very high overlap among other trip segments.


Sometimes this trip is also motivated by the need to attend a special family or friend celebration such as a wedding - which also serves as a good excuse to take a few extra days off for a quick recharge getaway.

AGE OF TRAVELLER

- 18-34
- 35-49
- 50-64
- 65+

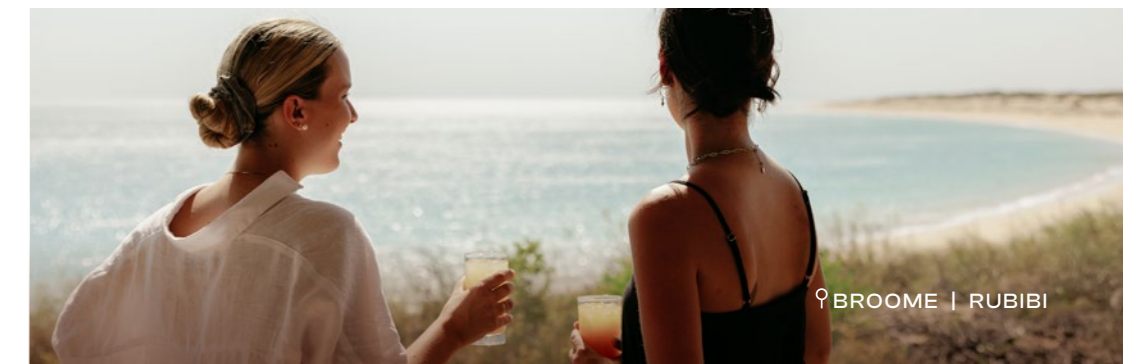
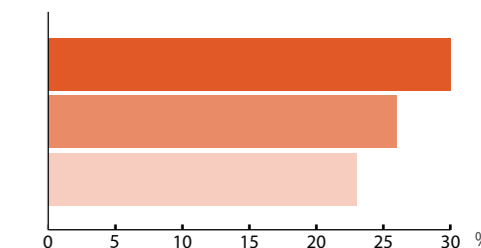


TOP ACTIVITIES

-  Dining out ▲
-  Shopping ▲
-  Rest and relaxation ▲
-  Visiting friends and relatives ▲

TOP ACCOMMODATION

- RENTED HOUSE
- LUXURY HOTEL/RESORT
- STANDARD HOTEL/MOTEL





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