

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+

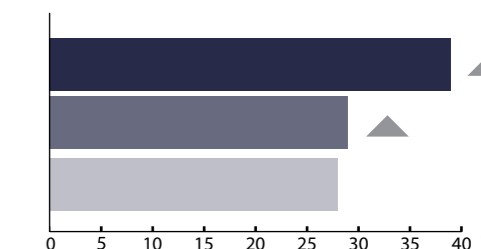


TOP ACTIVITIES

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

TOP ACCOMMODATION

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



♀ BROOME | RUBIBI

PREMIUM NATURE INTERSTATE TARGET MARKET

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

ABOUT THIS PROFILE

Tourism WA's Domestic Segmentation study (2023) identified three types of trips that are priorities for interstate travel to Western Australia:

- Premium Nature;
- Luxe Culture; and
- City Social.

This page profiles Tourism WA's interstate target market for Premium Nature trips. It describes the type of Australians who are most likely to take Premium Nature trips when travelling interstate.

Queries can be directed to:
research@westernaustralia.com

HELIX PERSONAS

The Helix Personas who are most likely to take a Premium Nature trip when travelling interstate in Australia:

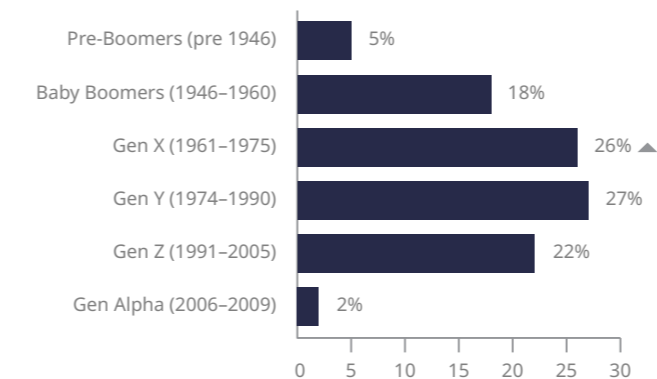
- 101 BLUECHIP
- 107 DOMESTIC BLISS
- 109 HUMANITARIANS
- 202 HEALTHY, WEALTHY & WISE
- 204 HIGH LIFE
- 305 TREND HUNTERS

The profile on this page is based on these Helix Personas grouped together. Some larger organisations and media partners have appended Helix Personas to their databases and can target specific Helix Personas directly. If this is not an option, the demographic, geographic, psychographic and media consumption information on this page can be used as an alternative method of targeting.

Source: Tourism WA, 2023. Analysis of Roy Morgan Helix Personas Audience Profiles.

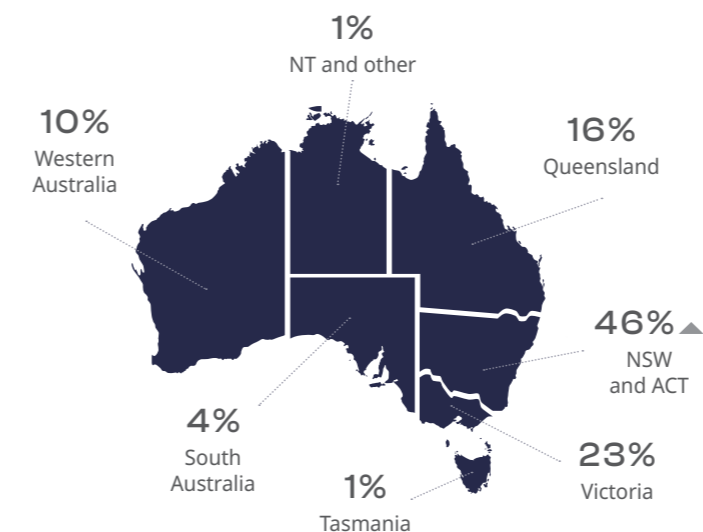
▲ OVER-INDEX (>10% MORE LIKELY) COMPARED TO GENERAL POPULATION

DEMOGRAPHICS & GEOGRAPHICS



Those Australians most likely to take Premium Nature over-index for Gen X, skewing towards mid-life families and households. Almost all live in metro areas, and almost half live in NSW (including ACT). They are most likely to be working as managers or professionals and are high income earners, in the top socio-economic groups.

2.9 million Australian population size
94%▲ live in metro areas



PSYCHOGRAPHICS

\$ Those Australians most likely to take Premium Nature interstate trips are big spenders - happy to pay for premium, quality, and luxury experiences and products.

🎯 They are well travelled and enjoy learning about different cultures, including Aboriginal culture.

🌳 They care about the environment.

+ They are passionate about health and fitness, play sports, and like to stay active while travelling.

📖 They consider themselves to be a bit of an intellectual.

💻 They are early adopters of new technology.

🍷 They enjoy entertaining friends, going out to eat/drink, and attending gigs, theatre or shows.

MEDIA CONSUMPTION

Those Australians most likely to take a Premium Nature interstate trip consume a range of media, predominantly online. Compared to the general population, they are more likely to:

- See outdoor advertising
- Read a newspaper or magazine online
- Watch / read ABC and SBS
- Use Booking.com and Airbnb
- Use LinkedIn
- Read the business section of the newspaper
- Go to the cinema

MEDIA	USAGE*		
	LIGHT	MEDIUM	HEAVY
FREE-TO-AIR TV	●		
SUBSCRIPTION TV		●	
RADIO			●
NEWSPAPERS			●
MAGAZINES		●	
CINEMA			●
DIRECT MAIL		●	
SOCIAL MEDIA		●	
INTERNET			●

*In comparison to general population.

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?

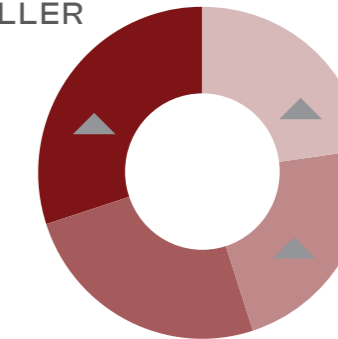
- Couples wanting to indulge
- Celebrating special events
- Food and wine lovers
- Interested in accessible premium nature experiences such as exploring pearl farm and wineries
- Helix Communities: 100's Leading Lifestyles and 200s Metrotechs

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+

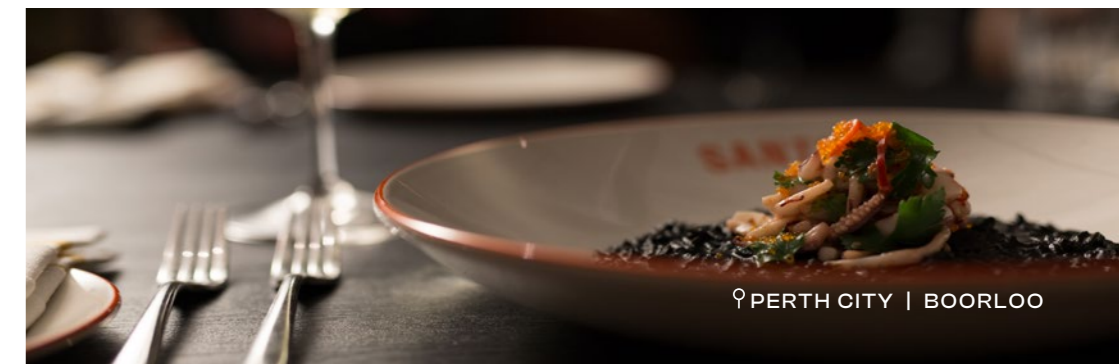
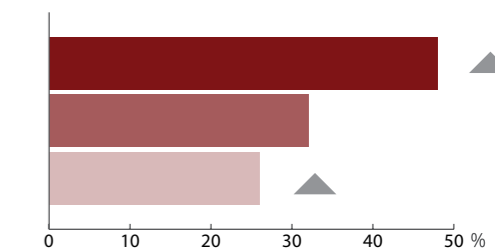


TOP ACTIVITIES

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

TOP ACCOMMODATION

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



PERTH CITY | BOORLOO



LUXE CULTURE

INTERSTATE TARGET MARKET

“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”

ABOUT THIS PROFILE

Tourism WA's Domestic Segmentation study (2023) identified three types of trips that are priorities for interstate travel to Western Australia:

- Premium Nature;
- Luxe Culture; and
- City Social.

This page profiles Tourism WA's interstate target market for Luxe Culture trips. It describes the type of Australians who are most likely to take Luxe Culture trips when travelling interstate.

Queries can be directed to:
research@westernaustralia.com

HELIX PERSONAS

The Helix Personas who are most likely to take a Luxe Culture trip when travelling interstate in Australia:

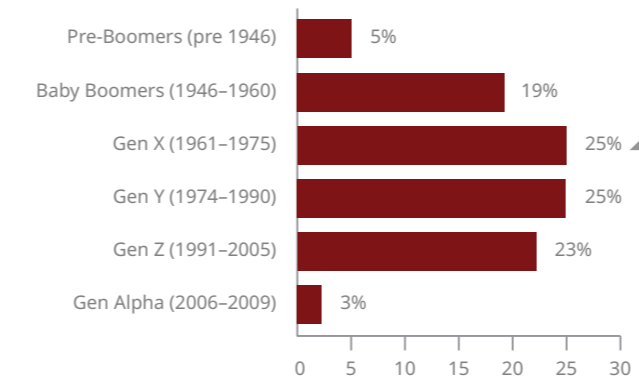
- | | |
|---------------------------|---------------------------|
| 101 BLUECHIP | 209 SOCIABLE TRENDSETTERS |
| 102 SMART MONEY | 307 EXPERIENCE SEEKERS |
| 104 HAVING IT ALL | 403 RUSTIC HEARTLAND |
| 106 SELF-MADE LIFESTYLERS | 501 MAKING ENDS MEET |
| 107 DOMESTIC BLISS | 503 FUN FIRST |
| 109 HUMANITARIANS | 506 MAKING THE RENT |
| 205 LIBERTARIANS | 507 ACTIVE SOCIAL |

The profile on this page is based on these Helix Personas grouped together. Some larger organisations and media partners have appended Helix Personas to their databases and can target specific Helix Personas directly. If this is not an option, the demographic, geographic, psychographic and media consumption information on this page can be used as an alternative method of targeting.

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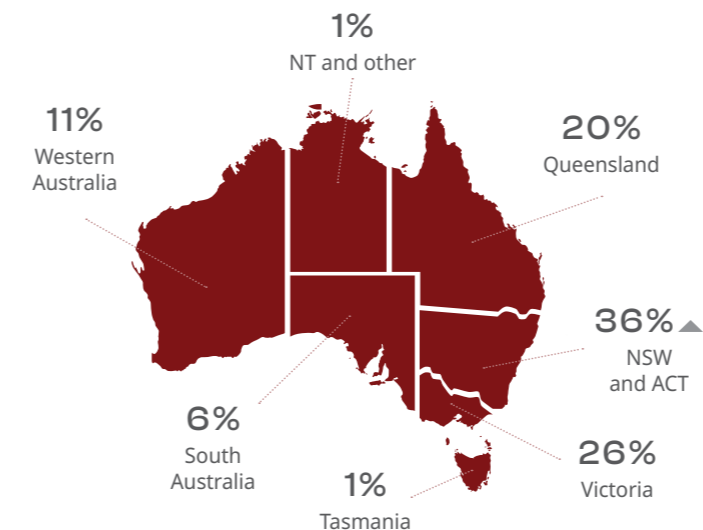
▲ OVER-INDEX (>10% MORE LIKELY) COMPARED TO GENERAL POPULATION

DEMOGRAPHICS & GEOGRAPHICS



Those Australians most likely to take Luxe Culture interstate trips cover a spread of ages, but over-index for Gen X. They are more likely to live in metro areas. They are most likely to be employed, high individual income earners and over-index in the top socio-economic status groups. They are more likely to not have any children in the household.

5.2 million Australian population size
85% live in metro areas



PSYCHOGRAPHICS

- Those Australians most likely to take Luxe Culture interstate trips are educated and enjoy learning new things.
- They are big spenders, though value being financially stable.
- They like to entertain and have a glass of wine with dinner.
- They are early adopters of new technology and active participants in the sharing economy, using apps like Airbnb and Uber.
- They are often out and about, at a café/ restaurant, shopping, or enjoying the theatre / galleries / museums.
- They are health conscious, like to be active, and enjoy a range of sports – both as a participant and a spectator.

MEDIA CONSUMPTION

Those Australians most likely to take a Luxe Culture interstate trip consume a range of media. Compared to the general population, they are more likely to:

- Watch / read ABC
- Use LinkedIn
- Read the business section of the newspaper
- Read The Guardian and The Australian
- Use travel apps (Stayz, Airbnb)
- See outdoor advertising
- Go to the cinema

MEDIA	USAGE*		
	LIGHT	MEDIUM	HEAVY
FREE-TO-AIR TV	●		
SUBSCRIPTION TV		●	
RADIO		●	
NEWSPAPERS			●
MAGAZINES		●	
CINEMA			●
DIRECT MAIL		●	
SOCIAL MEDIA		●	
INTERNET			●

*In comparison to general population.



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

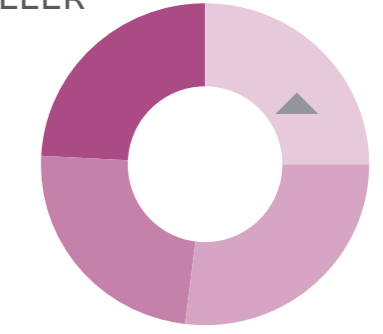
WHO TAKES A CITY SOCIAL TRIP?

- 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+

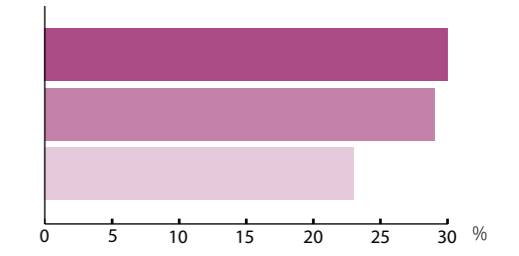


TOP ACTIVITIES

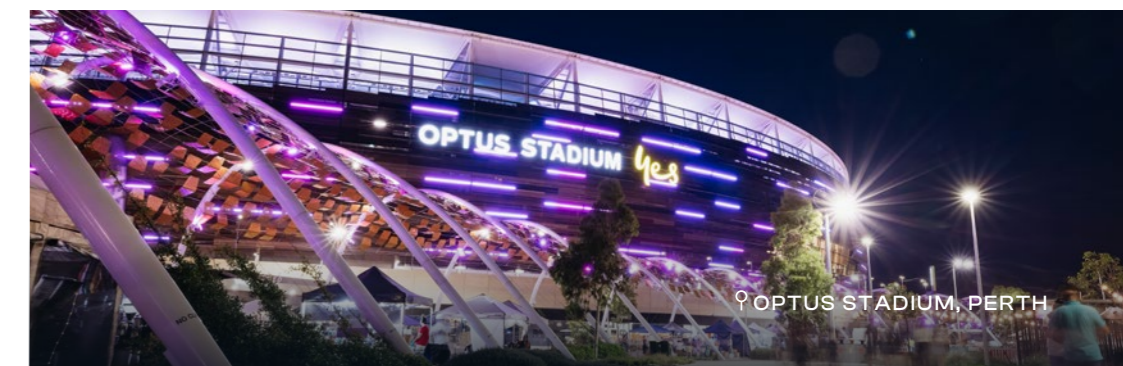
- 🍸 Nightclubs, bars, nightlife ▲
- 🎵 Musical performances, concerts
- 🏏 Football, rugby, cricket ▲
- 🎰 Visit a casino
- 🎭 Theatre

TOP ACCOMMODATION

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



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



♀ OPTUS STADIUM, PERTH



CITY SOCIAL

INTERSTATE TARGET MARKET

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

ABOUT THIS PROFILE

Tourism WA's Domestic Segmentation study (2023) identified three types of trips that are priorities for interstate travel to Western Australia:

- Premium Nature;
- Luxe Culture; and
- City Social.

This page profiles Tourism WA's interstate target market for City Social trips. It describes the type of Australians who are most likely to take City Social trips when travelling interstate.

Queries can be directed to:
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HELIX PERSONAS

The Helix Personas who are most likely to take a City Social trip when travelling interstate in Australia:

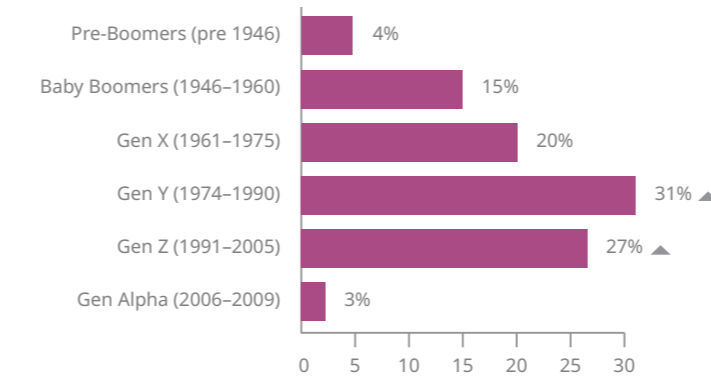
- | | |
|-----------------------------|---------------------------|
| 105 VISIBLE SUCCESS | 206 FIT AND FAB |
| 111 SUCCESS MATTERS | 207 SEASONED LIFESTYLERS |
| 112 SAVVY SELF-STARTERS | 208 FUTURE FOCUS |
| 113 CULTURED EPICUREANS | 209 SOCIABLE TRENDSETTERS |
| 201 YOUNG & PLATINUM | 305 TREND HUNTERS |
| 202 HEALTHY, WEALTHY & WISE | 402 WORKING HARD |
| 203 CULTURE LEADERS | 502 TECH LIFE |
| 204 HIGH LIFE | |

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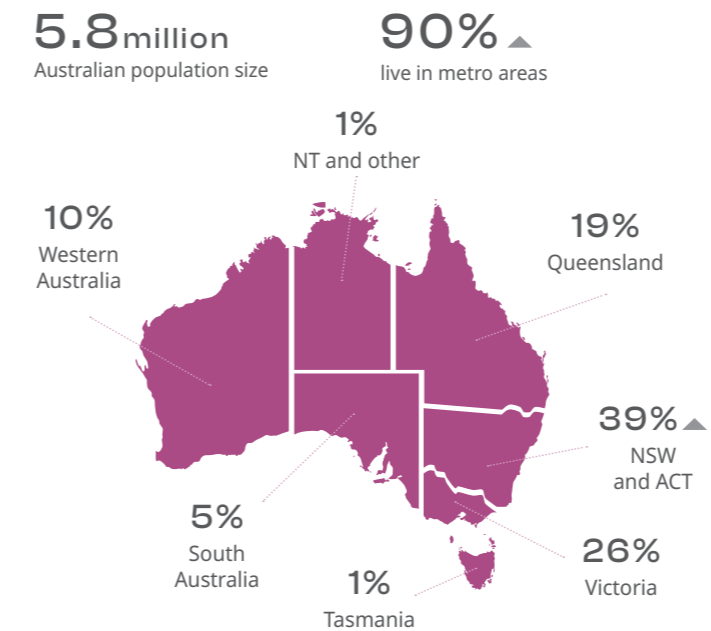
Source: Tourism WA, 2023. Analysis of Roy Morgan Helix Personas Audience Profiles.

▲ OVER-INDEX (>10% MORE LIKELY) COMPARED TO GENERAL POPULATION

DEMOGRAPHICS & GEOGRAPHICS



Those Australians most likely to take City Social interstate trips skew towards younger age groups, and over-index for Gen Y and Gen Z. They are more likely to live in metro areas and over-index in NSW. They are more likely to have been born in a country other than Australia (41%). They are most likely to be working and are mid-high income earners.



PSYCHOGRAPHICS

- Those Australians most likely to take City Social interstate trips are very social and enjoy being with a crowd of people.
- They enjoy drinking alcohol, particularly premium beers and wines, and like to try new drinks.
- They are active and more likely to go to the gym, do yoga/Pilates, or play team sports.
- They enjoy going to cafes/restaurants and pubs/bars/clubs.
- They are event goers and more likely than the general population to attend sports events or music festivals.
- They are early adopters of technology, like to keep up with trends, and enjoying trying new things.
- They are career driven and value success.

MEDIA CONSUMPTION

Those Australians most likely to take a City Social interstate trip are heavy users of the internet. Compared to the general population, they are more likely to:

- Use apps
- Consume news online
- See outdoor advertising
- Use LinkedIn
- Use travel apps (Stayz, Airbnb)
- Go to the cinema

MEDIA	USAGE*		
	LIGHT	MEDIUM	HEAVY
FREE-TO-AIR TV	●		
SUBSCRIPTION TV		●	
RADIO	●		
NEWSPAPERS		●	
MAGAZINES	●		
CINEMA			●
DIRECT MAIL	●		
SOCIAL MEDIA			●
INTERNET			●

*In comparison to general population.

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

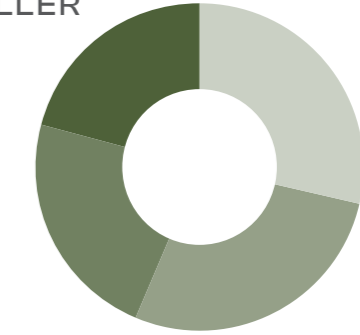
The Simple Nature trip taker is the typical Australian who loves nothing more than to escape the everyday for some time off the grid, getting back to the simple things in nature; a hike in the bush, some fishing and plenty of time to unwind, take things slow and spend some quality time with travel mates.

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+

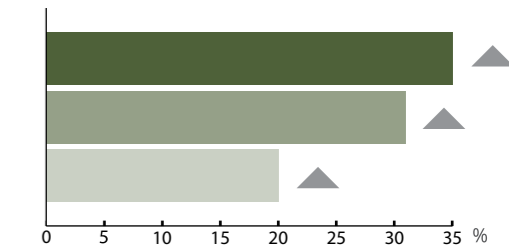


TOP ACTIVITIES

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

TOP ACCOMMODATION

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



♀ YANCHEP NATIONAL PARK



SIMPLE NATURE

INTRASTATE TARGET MARKET

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

♀ BORANUP FOREST, MARGARET RIVER REGION

ABOUT THIS PROFILE

Tourism WA's Domestic Segmentation study (2023) identified that when travelling within their own state, West Australians are most commonly taking one of three types of trips:

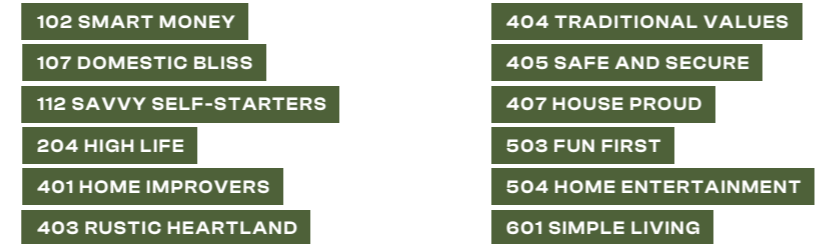
- Relax and Recharge;
- Simple Nature; and
- Family Time.

This page profiles the types of Australians who are most likely to take Simple Nature trips when travelling intrastate.

Queries can be directed to:
research@westernaustralia.com

HELIX PERSONAS

The Helix Personas who are most likely to take a Simple Nature trip when travelling intrastate:

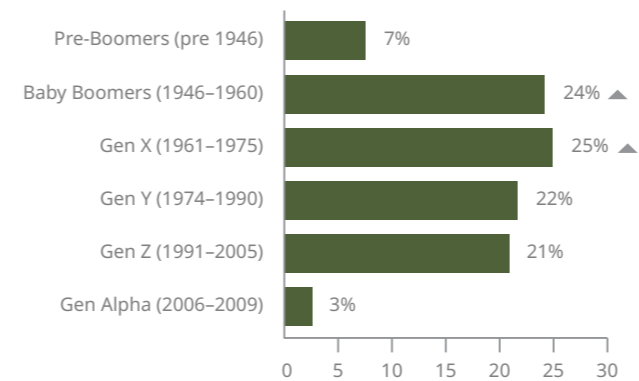


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Source: Tourism WA, 2023. Analysis of Roy Morgan Helix Personas Audience Profiles.

▲ OVER-INDEX (>10% MORE LIKELY) COMPARED TO GENERAL POPULATION

DEMOGRAPHICS & GEOGRAPHICS

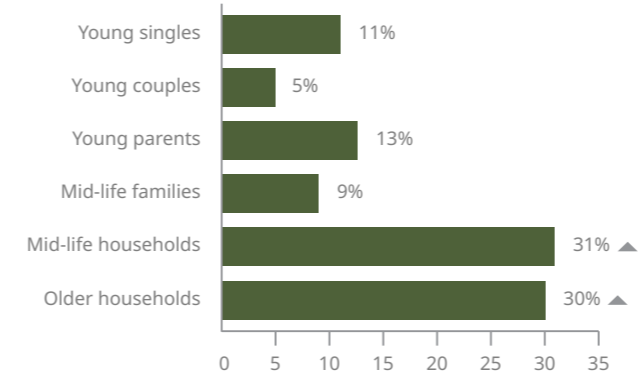
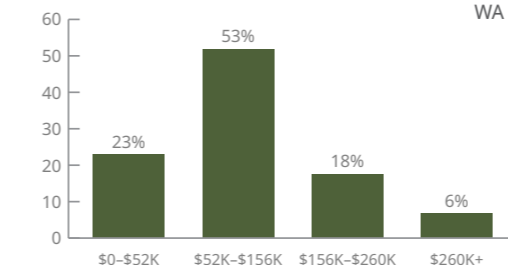


Generational ages as at 2023

Those most likely to take Simple Nature intrastate trips cover a spread of ages, but over-index for Gen X and Baby Boomers. They are more likely to live in Regional WA (~30%, compared to just 20% of the general WA population).

HOUSEHOLD INCOME

873,000
WA population size



PSYCHOGRAPHICS

Those Australians most likely to take Simple Nature intrastate trips are mostly mid-range socio-economic status.

They aren't bothered with latest fashion, trends or technology—it's just not important to them.

They try to avoid crowds and big cities.

They are handy and practical, making choices based on functionality rather than status or looks.

They often cook at home but also like to go to the pub.

They prefer nature-based leisure activities like going to the beach or for a bushwalk or cultural or man-made attractions / experiences like museums, art galleries etc.

MEDIA CONSUMPTION

Those Australians most likely to take a Simple Nature intrastate trip consume a range of media. Compared to the general population, they are more likely to:

- Watch TV for both news and entertainment
- Read motoring club magazines
- Have Pay TV
- Listen to ABC radio and watch ABC news
- Watch home / lifestyle / travel TV shows

MEDIA	USAGE*		
	LIGHT	MEDIUM	HEAVY
FREE-TO-AIR TV		●	
SUBSCRIPTION TV		●	
RADIO		●	
NEWSPAPERS			●
MAGAZINES			●
CINEMA		●	
DIRECT MAIL			●
SOCIAL MEDIA	●		
INTERNET		●	

*In comparison to general population.

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?

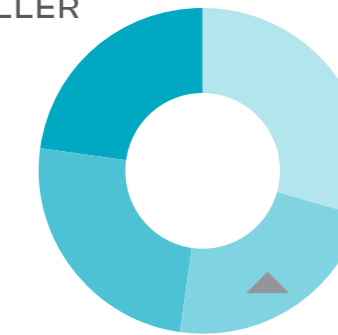
- Families with kids
- Seeking quality family time, relaxation and a break from routine
- Spend time swimming, watching dolphins and other beach-related activities
- Helix Communities: 100's Leading Lifestyles and 400's Hearth & Home

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+

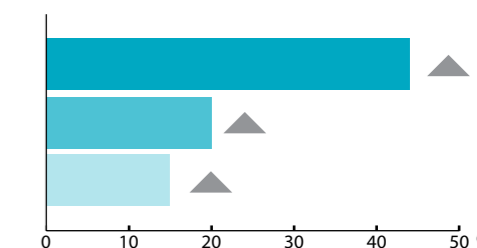


TOP ACTIVITIES

- 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



FAMILY TIME

INTRASTATE TARGET MARKET

“ 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

ABOUT THIS PROFILE

Tourism WA's Domestic Segmentation study (2023) identified that when travelling within their own state, West Australians are most commonly taking one of three types of trips:

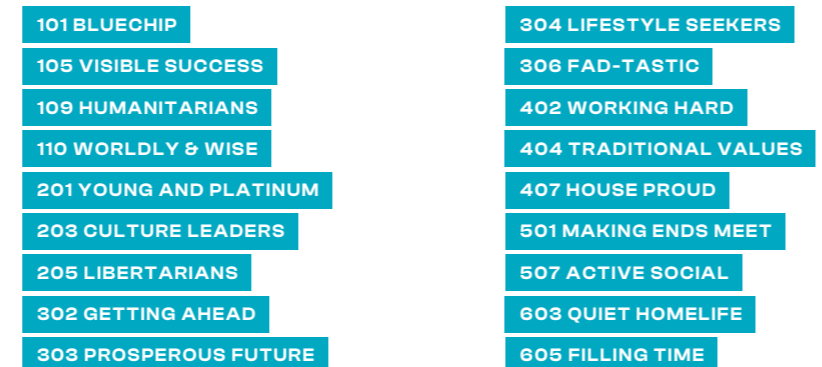
- Relax and Recharge;
- Simple Nature; and
- Family Time.

This page profiles the types of Australians who are most likely to take Family Time trips when travelling intrastate.

Queries can be directed to:
research@westernaustralia.com

HELIX PERSONAS

The Helix Personas who are most likely to take a Family Time trip when travelling intrastate:

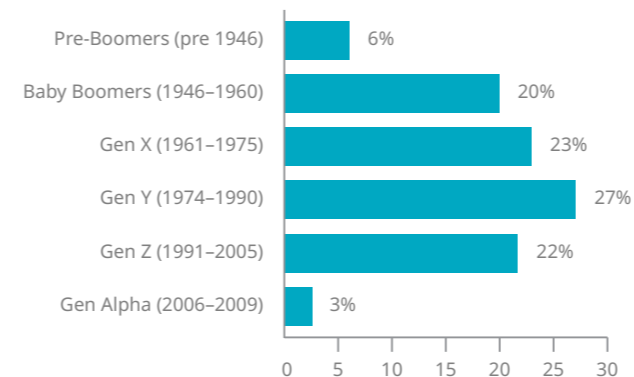


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Source: Tourism WA, 2023. Analysis of Roy Morgan Helix Personas Audience Profiles.

▲ OVER-INDEX (>10% MORE LIKELY) COMPARED TO GENERAL POPULATION

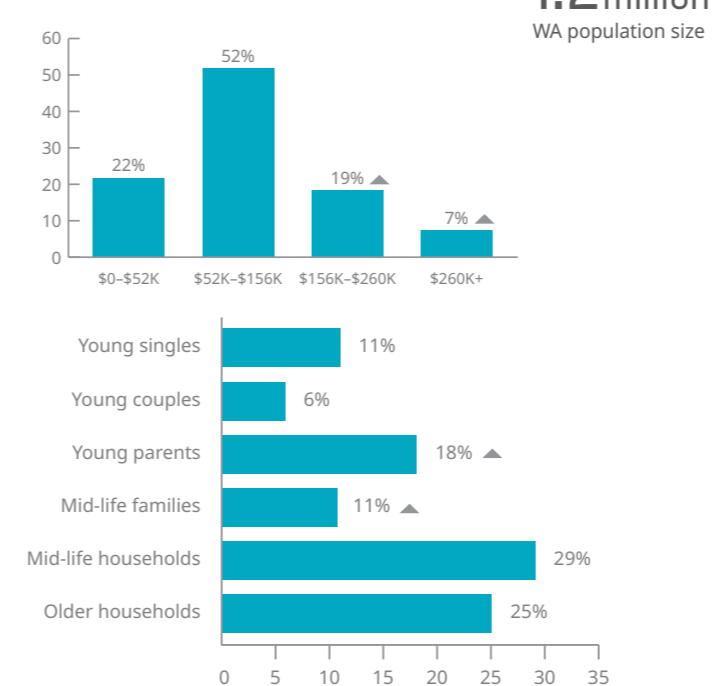
DEMOGRAPHICS & GEOGRAPHICS



Generational ages as at 2023

Those most likely to take Family Time intrastate trips cover a spread of ages, but over-index for Gen X and Gen Y. They more likely to be married with children, to live in a house, and to have a mortgage. They over-index for being born in NZ, UK or India, representing a flow-on opportunity for international VFR.

HOUSEHOLD INCOME



PSYCHOGRAPHICS

- Those Australians most likely to take Family Time intrastate trips are most likely to be working and earn a mid to high income.
- They are shoppers and consider themselves medium to big spenders.
- Value for money is important to this group; they are more likely to be impacted by interest rates.
- They enjoy going out to cafes, restaurants and the pub.

- They are more likely to go to the zoo and/or theme parks.
- With a busy life, they value the convenience of services like food delivery and click and collect.
- They skew towards high usage of technology.

MEDIA CONSUMPTION

Those Australians most likely to take a Family Time intrastate trip have a fairly generic media profile, as they cover a wide demographic.

- They watch less than 2 hours of commercial TV per day.
- Around 70% watch SVOD at least weekly, most around 3-14 hours.
- They listen to the radio in the car, over-indexing for Hit Network, Nova, and Triple M.
- They use Facebook (90%) and Instagram (70%) most commonly.

MEDIA	USAGE*		
	LIGHT	MEDIUM	HEAVY
FREE-TO-AIR TV		●	
SUBSCRIPTION TV			●
RADIO			●
NEWSPAPERS	●		
MAGAZINES		●	
CINEMA		●	
DIRECT MAIL		●	
SOCIAL MEDIA		●	
INTERNET		●	

*In comparison to general population.

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?

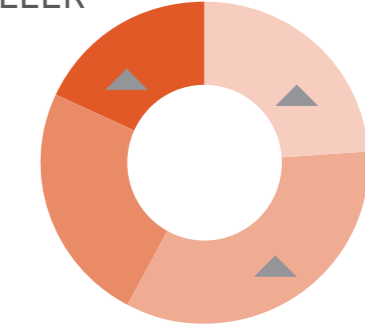
- Couples without children
- Choice of destination is not very important to them - purpose of the trip is to relax
- Sometimes triggered by attending an event, such as a wedding
- Helix Communities: 100's Leading Lifestyles and 200s Metrotechs

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+

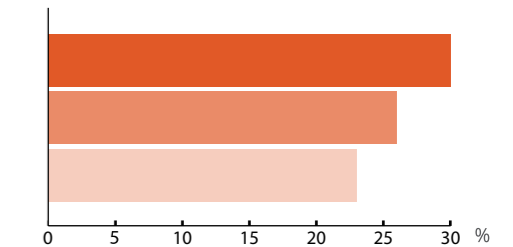


TOP ACTIVITIES

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

TOP ACCOMMODATION

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



RELAX & RECHARGE

INTRASTATE TARGET MARKET



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

♀ MONKEY MIA, SHARK BAY WORLD HERITAGE AREA | GUTHARRAGUDA

ABOUT THIS PROFILE

Tourism WA's Domestic Segmentation study (2023) identified that when travelling within their own state, West Australians are most commonly taking one of three types of trips:

- Relax and Recharge;
- Simple Nature; and
- Family Time.

This page profiles the types of Australians who are most likely to take Relax and Recharge trips when travelling intrastate.

Queries can be directed to:
research@westernaustralia.com

HELIX PERSONAS

The Helix Personas who are most likely to take a Relax and Recharge trip when travelling intrastate:

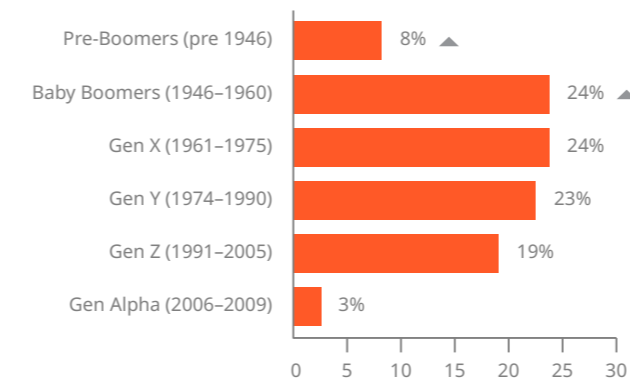


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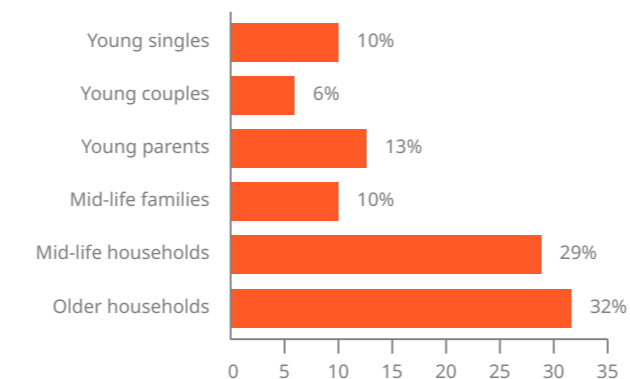
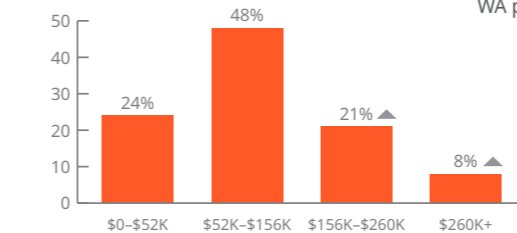
DEMOGRAPHICS & GEOGRAPHICS



Generational ages as at 2023

Those most likely to take Relax and Recharge intrastate trips over-index for Baby Boomers, skewing towards mid-life and older households. The majority feel financial stable and categorise themselves as medium to big spenders.

HOUSEHOLD INCOME **624,000**
WA population size



PSYCHOGRAPHICS

- Those Australians most likely to take Relax and Recharge intrastate trips have traditional values.
- They enjoy the simple joys in life; a home cooked meal, fresh flowers, reading a book and working in the garden.
- They like to support local and buy Australian.

- They are less likely to buy take away, but enjoy going out to cafes and restaurants.
- While they like watching sports on TV or attending a sports event, they are less likely to participate in sports themselves.
- They are most likely to own their home outright or have a mortgage.

MEDIA CONSUMPTION

Those Australians most likely to take a Relax and Recharge are heavy consumers of media compared to the general population They are more likely to:

- Consume traditional media
- Watch commercial TV (most commonly Channel 7, 9 and ABC)
- Read direct mail
- Have Pay TV
- Read the West Australian

MEDIA	USAGE*		
	LIGHT	MEDIUM	HEAVY
FREE-TO-AIR TV		●	
SUBSCRIPTION TV	●		
RADIO		●	
NEWSPAPERS			●
MAGAZINES			●
CINEMA		●	
DIRECT MAIL			●
SOCIAL MEDIA	●		
INTERNET		●	

*In comparison to general population.



Tourism
WESTERN AUSTRALIA

WESTERN
AUSTRALIA
WALKING ON A DREAM