



SHAPING THE FUTURE OF ADVENTURE AND CULTURAL TRAVEL

Profiles and behaviors of adventure and cultural travelers from the United States and Australia

AN INITIATIVE OF THE PACIFIC PARTNERSHIP

IN COLLABORATION WITH



EXECUTIVE SUMMARY

In today's hypercompetitive market for international travelers, a holistic and nuanced understanding of which travelers best align with destination travel offerings is necessary. A full picture of the traveler – going beyond simple identifiers such as age, income and gender – is needed in order to shape travel products and to frame and direct marketing messages precisely.

With this in mind, the International Finance Corporation (IFC) partnered with the Adventure Travel Trade Association (ATTA) on an in-depth study of adventure and cultural travelers originating in the United States of American (USA) and Australia. The countries represent two key outbound markets for international travel in general, and for the islands of the Pacific. IFC has a portfolio of tourism projects in the Pacific that support growth in high value tourism markets. In 2019, this includes Fiji, Papua New Guinea, Vanuatu, and Solomon Islands.

SPECIFIC RESEARCH OBJECTIVES

- ▶ Determine a detailed profile of the American and Australian adventure tourist and cultural tourist markets with a specific focus on their decision-making processes when selecting a holiday destination.
- ▶ Provide specific and implementable marketing and product development recommendations that can be leveraged to improve the marketing strategies of IFC's tourism project countries (Fiji, Papua New Guinea, Solomon Islands and Vanuatu).

Detailed recommendations stemming from the second objective are confidential and not included in this public report.



KEY RESULTS

IFC and partners surveyed a total of 2,514 identified international travel consumers from USA (1,239) and Australia (1,275) through an online primary survey between April 30 and May 17, 2019. This was followed by an additional digital listening activity that evaluated 800 million social media posts.

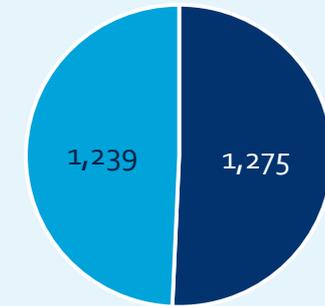
Through analysis of demographic and attitudinal indicators and cluster analysis, the partners identified four primary consumer market segments within the respondents, with three deemed to be of higher potential to travel internationally for adventure and/or cultural purposes. The segments are based on distinct travel preferences, personal priorities and values, and future travel behavior. Combined, the three segments represent 18.8 percent of the USA and 28.9 percent of the Australian adult online consumer populations. The full methodology is included as Annex 1.

It is significant to note that the segments are consistent across nationality with few differences between USA and Australian travelers in each segment. With this realization a set of three primary segments was developed that apply to travelers from both markets. In areas where significant differences between USA and Australian travelers were apparent, this has been noted.

The three segments represent a \$108.4 billion USD market size.

Spend based on market size and median spend per trip from survey responses.

2,514 Respondents



■ Americans ■ Australians

3 Target Segments



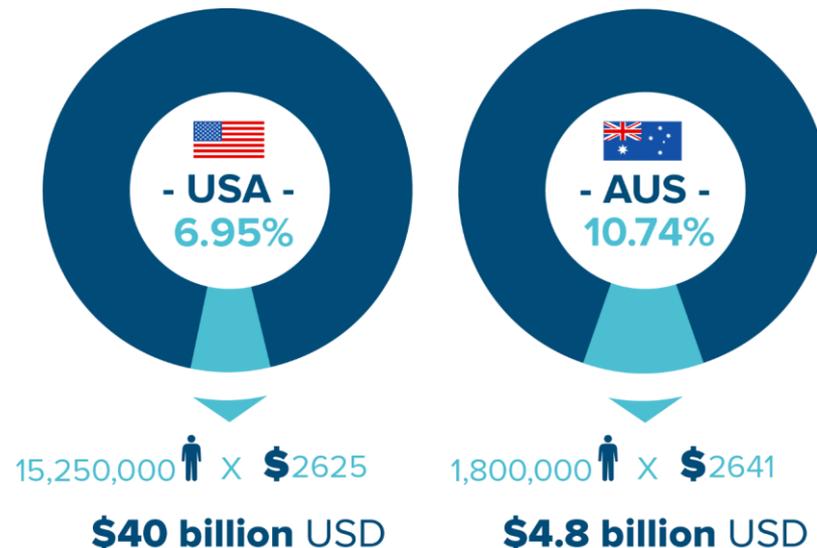
MEET THE SEGMENTS: ADVENTURE INTENSIVE

ADVENTURE INTENSIVE PROFILE

Adventure intensives skew male aged 25-44, are well educated with a medium income, and are more often married and living with their spouse and children. A smaller segment of this market is the younger Millennial market, both male and female, that is young, single and living on their own.

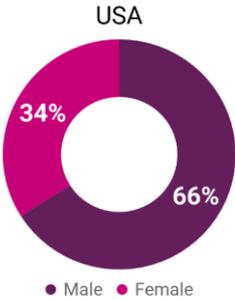
This is the most adventurous of the three target segments and the only group willing to endure some discomfort for an interesting experience. They are also the only people who say that they want to push their limits and that winning is very important to them. They also state that they actively seek out destinations where cultures and lifestyles are different from their own.

This segment is mostly likely to do the same activity regularly and frequently. They are most likely to travel as a family with children and to book and plan all trip elements themselves.

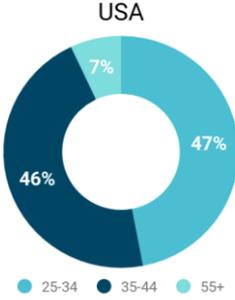


Spend per trip based on median of survey responses

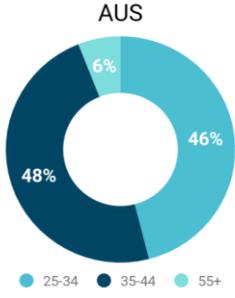
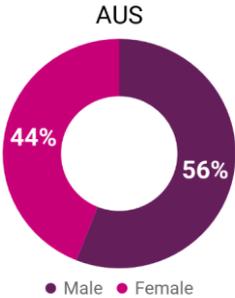
ADVENTURE INTENSIVE: DEMOGRAPHICS



GENDER

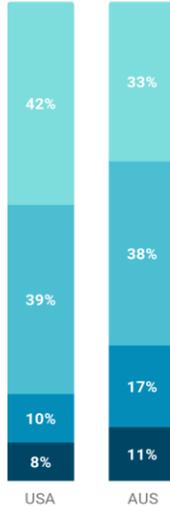


AGE



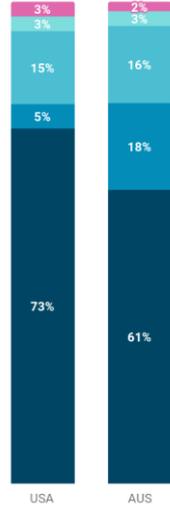
INCOME*

- \$200,000 or more
- \$150,000 - \$199,999
- \$125,000 - \$149,999
- \$100,000 - \$124,999
- \$80,000 - \$99,999
- \$60,000 - \$79,999
- \$40,000 - \$59,999



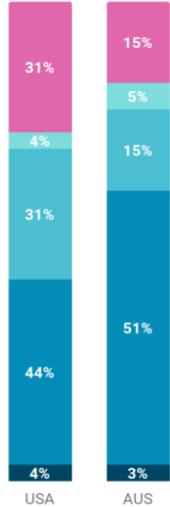
EDUCATION*

- Post-graduate degree
- Graduated college or university
- Some college or university
- High school



MARITAL STATUS**

- Divorced
- Married and separated from husband/wife
- Single
- Living with partner
- Married and living with husband/wife



HOME LIFE**

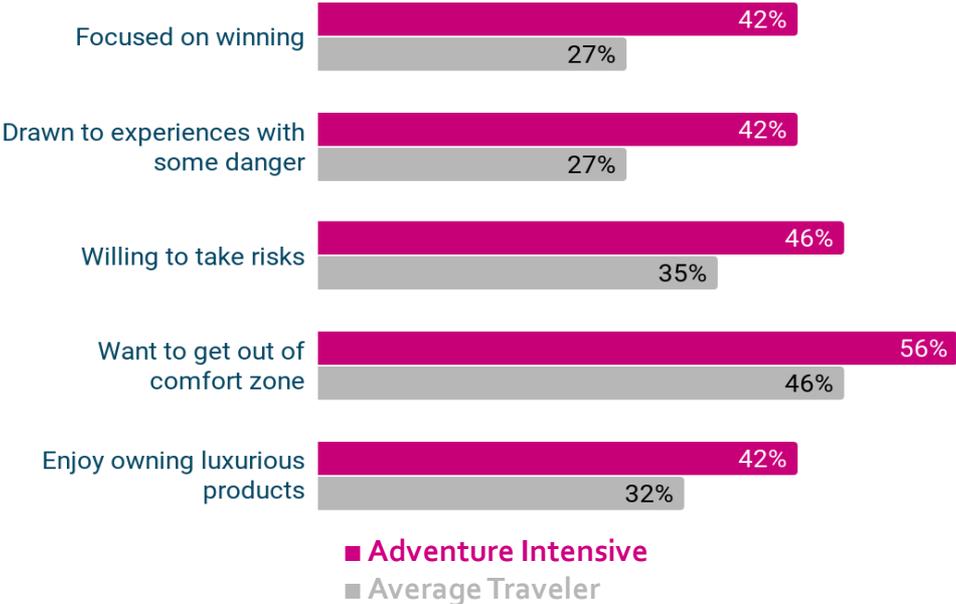
- On my own
- With friends or roommates
- Just with my partner
- With my partner, and children under 16
- With my partner, and children 16 or over

*Remaining % chose not to respond.
 **Total may not equal 100% due to rounding.

ADVENTURE INTENSIVE: PERSONALITY PROFILE

Connect with Adventure Intensives emotionally by emphasizing the opportunity to take risks and the ability to get out of their comfort zone while supporting local communities.

VIEW OF SELF



BENEFITS OF ADVENTURE TRAVEL



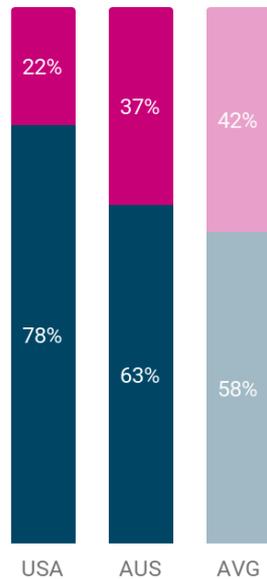
BENEFITS OF CULTURAL TRAVEL



Top 3 responses that differ most from average rating scores out of 5.

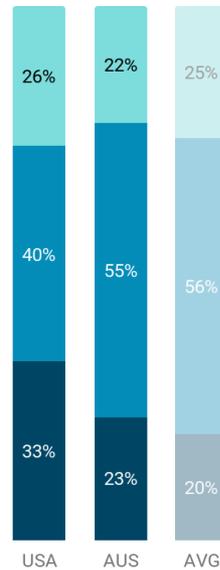
ADVENTURE INTENSIVE: ACTIVITY PARTICIPATION

Adventure Intensives are **highly motivated** by adventure activities, especially Americans. They are willing to try new challenges. They like both hard and soft adventure activities and tend to do the same ones repeatedly and regularly with **expert and advanced** skills. Australians are more likely to engage in a few different activities.



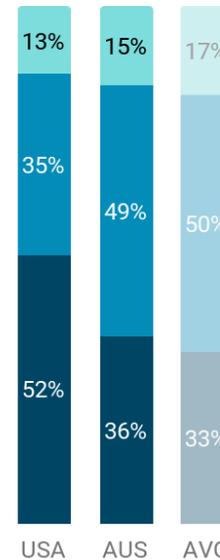
ADVENTURE AS PRIMARY TRIP MOTIVATOR

■ No
■ Yes



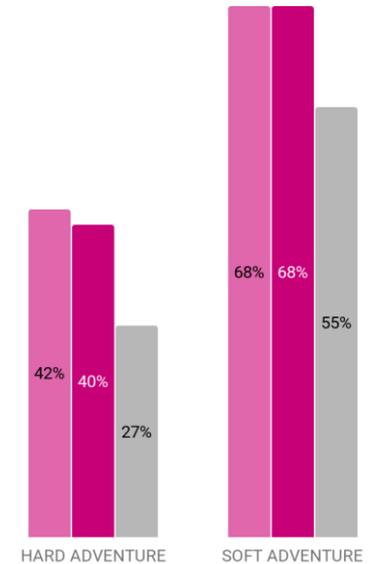
ACTIVITY EXPERIENCING

■ Usually try new activities
■ Usually do just a few different activities
■ Usually do the same activity



ACTIVITY FREQUENCY

■ This was a one-off during a trip
■ I do them every now and again
■ I do them regularly



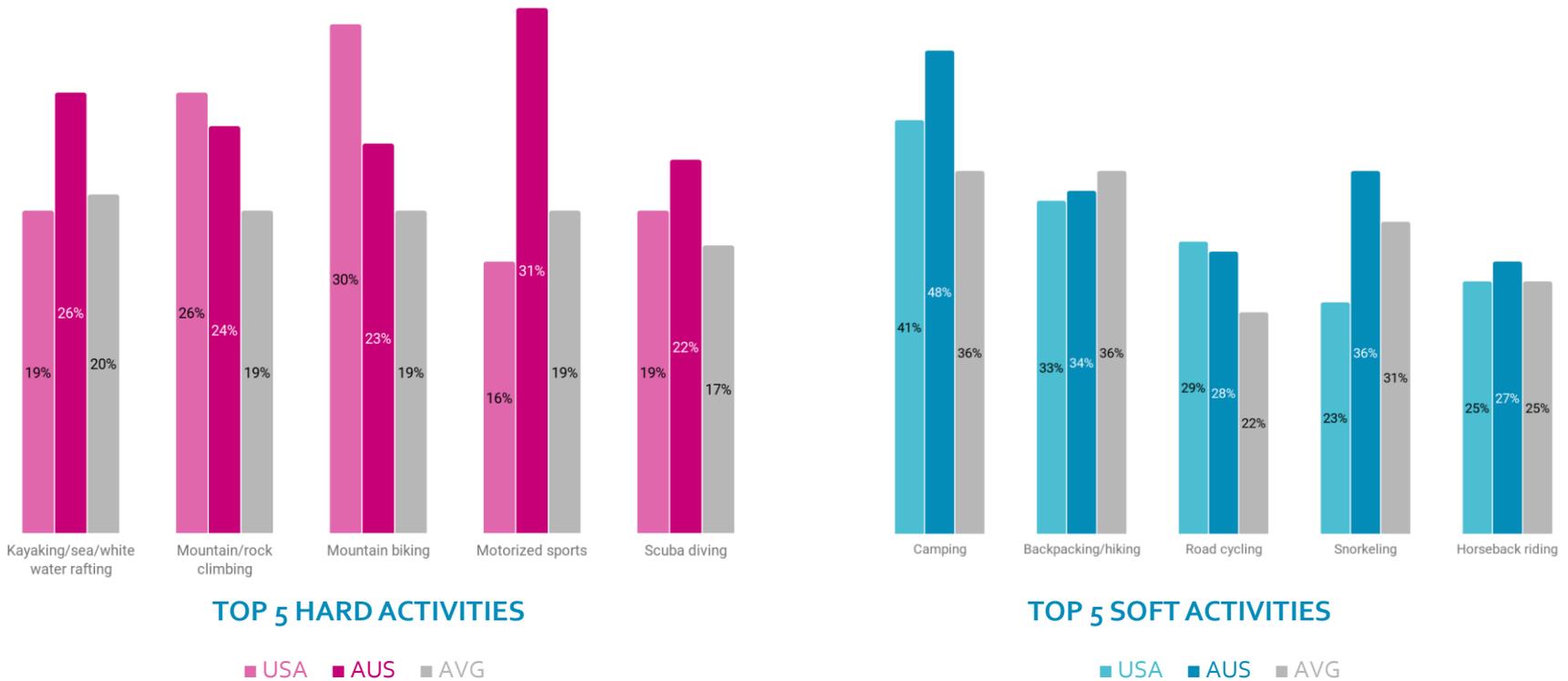
ACTIVITY PARTICIPATION*

■ USA
■ AUS
■ AVG

*Percentage of respondents who participated in this type of activity during a recent trip.

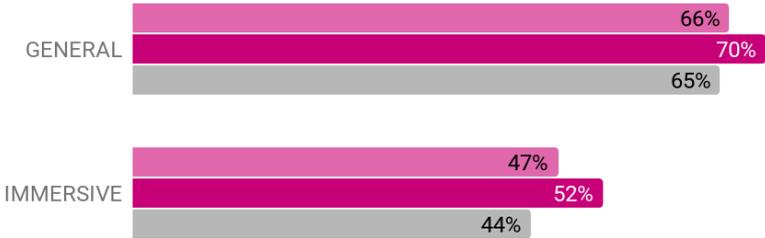
ADVENTURE INTENSIVE: ACTIVITY PARTICIPATION

As with other segments, Adventure Intensives like **camping** and **backpacking**, but also enjoy harder adventure activities. Australians in particular have an affinity for **kayaking/rafting**, **motorized sports** and **snorkeling**. Marketing messages should show intense physical activity both on land and in water, as well as the opportunity for soft activities for balance.



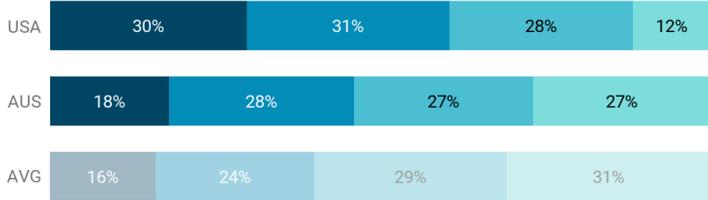
ADVENTURE INTENSIVE: CULTURAL ACTIVITY PARTICIPATION

Adventure Intensives seek out destinations with different lifestyles than their own and want to support local communities and businesses when they travel. However, they prefer general cultural activities to immersive experiences. Marketing messages should show how cultural experiences can expand these travelers' worldviews and demonstrate opportunities for learning from the local cultures.



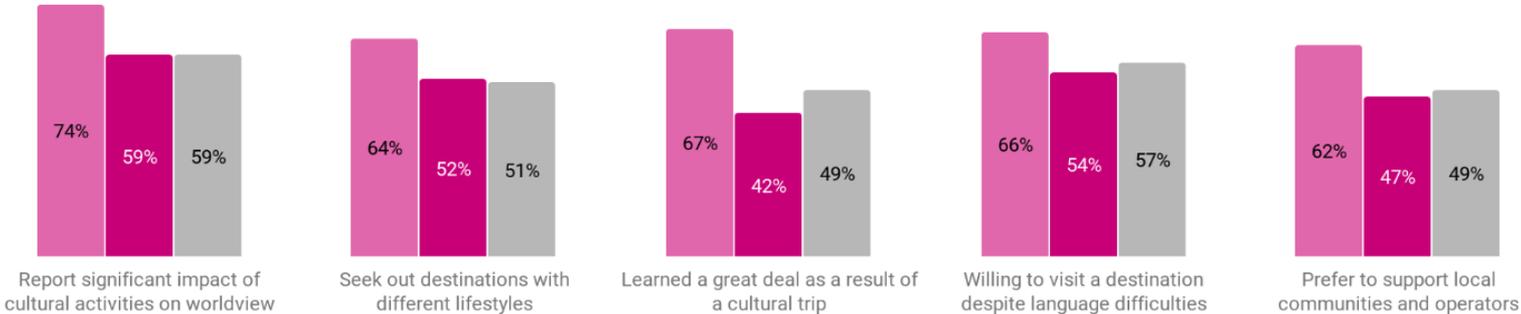
ACTIVITY PREFERENCES

■ USA ■ AUS ■ AVG



ACTIVITY FREQUENCY

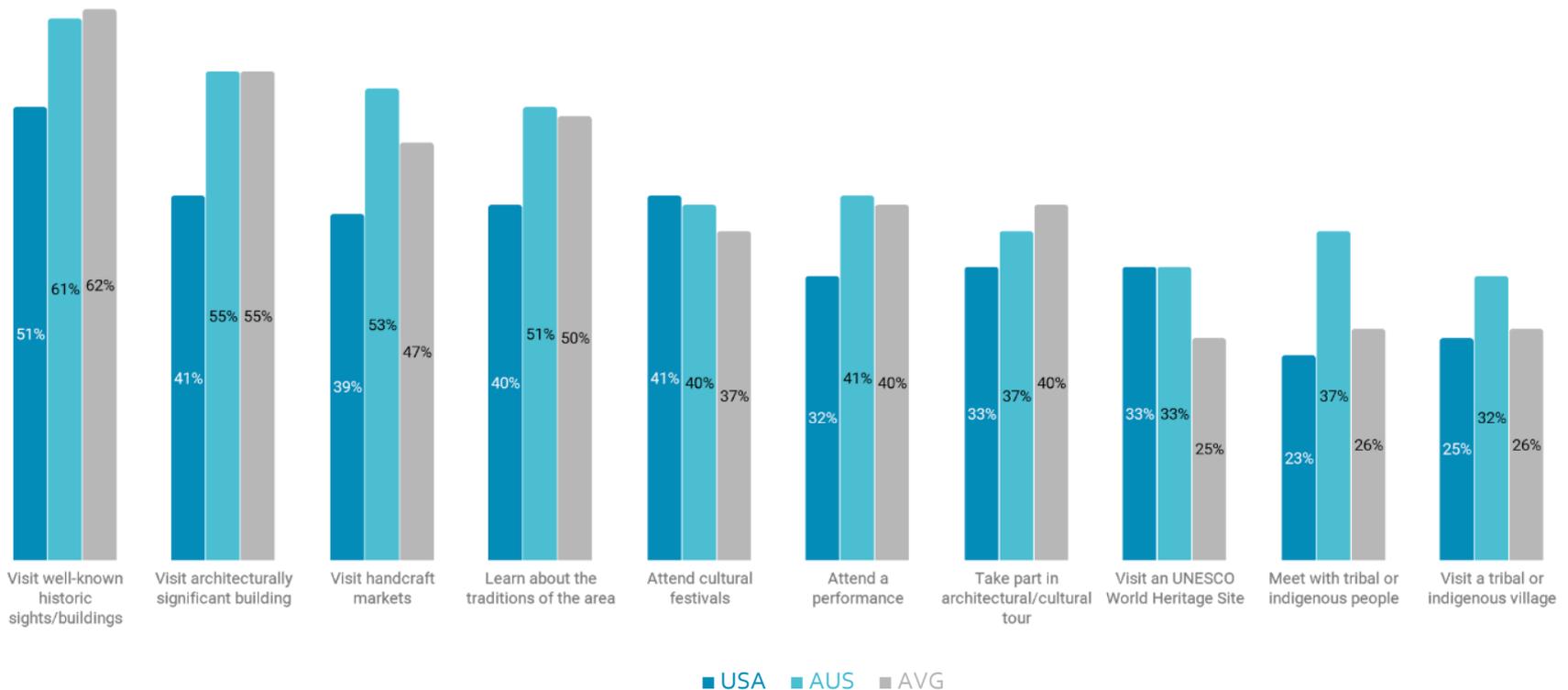
■ A few times a year or less
 ■ About once a week
 ■ Once or twice a month
 ■ More than once a week



■ USA ■ AUS ■ AVG

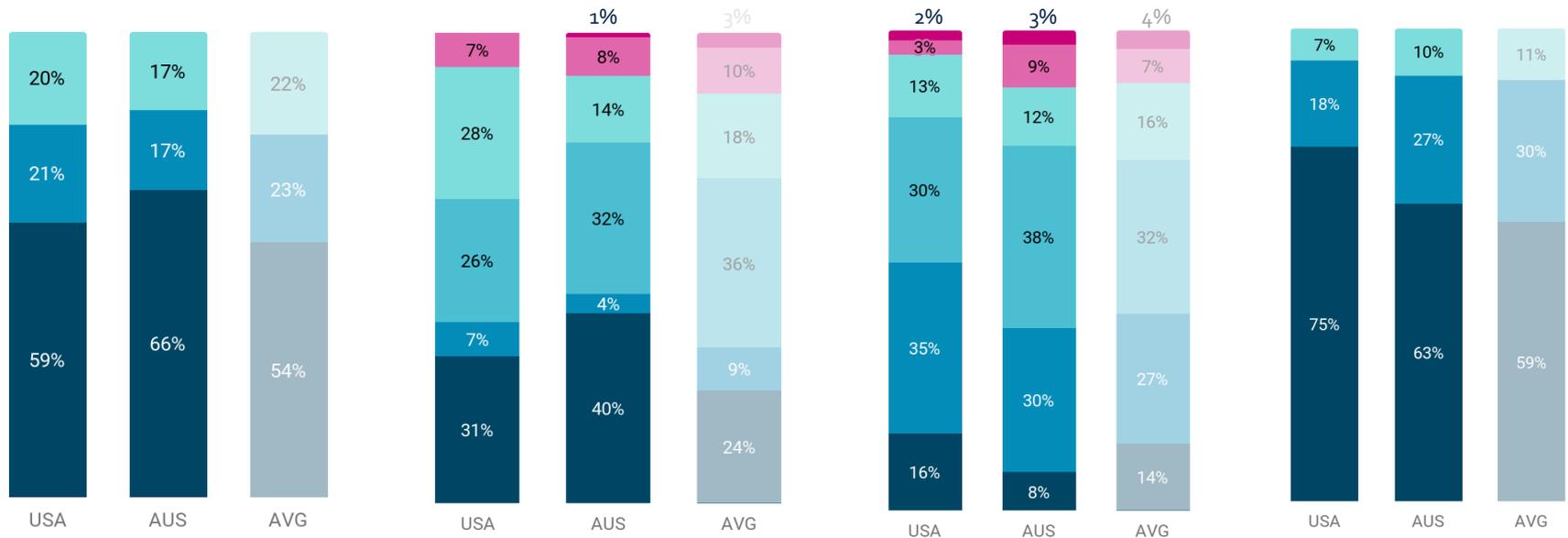
ADVENTURE INTENSIVE: CULTURAL ACTIVITY PARTICIPATION

Although Americans report a higher impact of cultural activities on their knowledge and worldview, they tend to actually participate less in these while traveling. This may be due to their propensity to do cultural activities more frequently in their daily lives (see previous page), leaving them to seek different experiences during a trip. Australians have higher than average levels of engagement in immersive activities like visiting villages and meeting with indigenous people.



ADVENTURE INTENSIVE: TRAVEL PROFILE

Adventure Intensives tend to travel with their family or in a couple, and Americans often travel with friends. As they often plan trips on short notice, they can be enticed with last-minute deals. This group also tends to book all elements individually, rather than as a package.



BOOKING BEHAVIOR

- Mix of the two
- Booked a package
- Booked all elements myself

TRAVEL COMPANIONS

- As part of a tour group
- With my family, adults only
- With friends
- On my own
- In a couple
- With my family, including children

PLANNING HORIZON

- More than 12 months
- 9-12 months
- 5-8 months
- 1-4 months
- 1-4 weeks
- A week or less

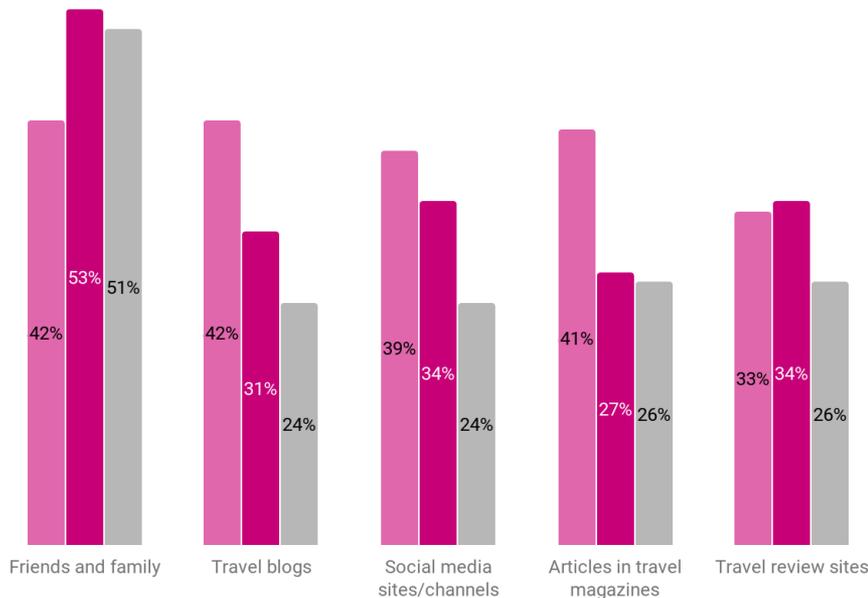
KEY DECISION MAKER

- Mostly someone else
- Both equally
- Mostly myself

(time taken to finalize itinerary and book once destination selected)

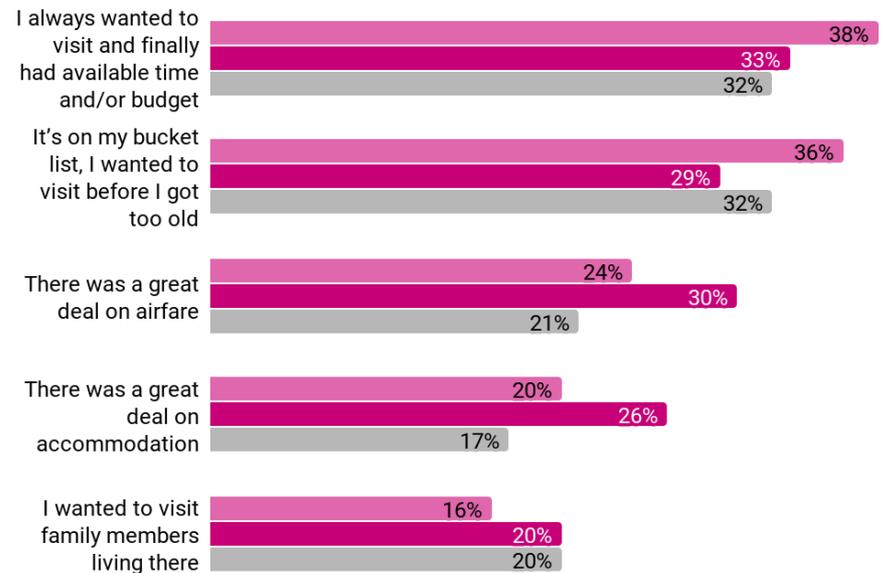
ADVENTURE INTENSIVE: DREAMING

American Adventure Intensives rely less on friends and family for inspiration and destination selection, instead turning to **travel blogs and travel magazines**. Australians mostly receive inspiration from **friends/family, social media and travel review sites**. Americans are more motivated by having the **time and budget** to visit places on their bucket list, and Australians are more motivated by **good deals on airfare and accommodation**.



TOP 5 TRAVEL INSPIRATION

■ USA ■ AUS ■ AVG

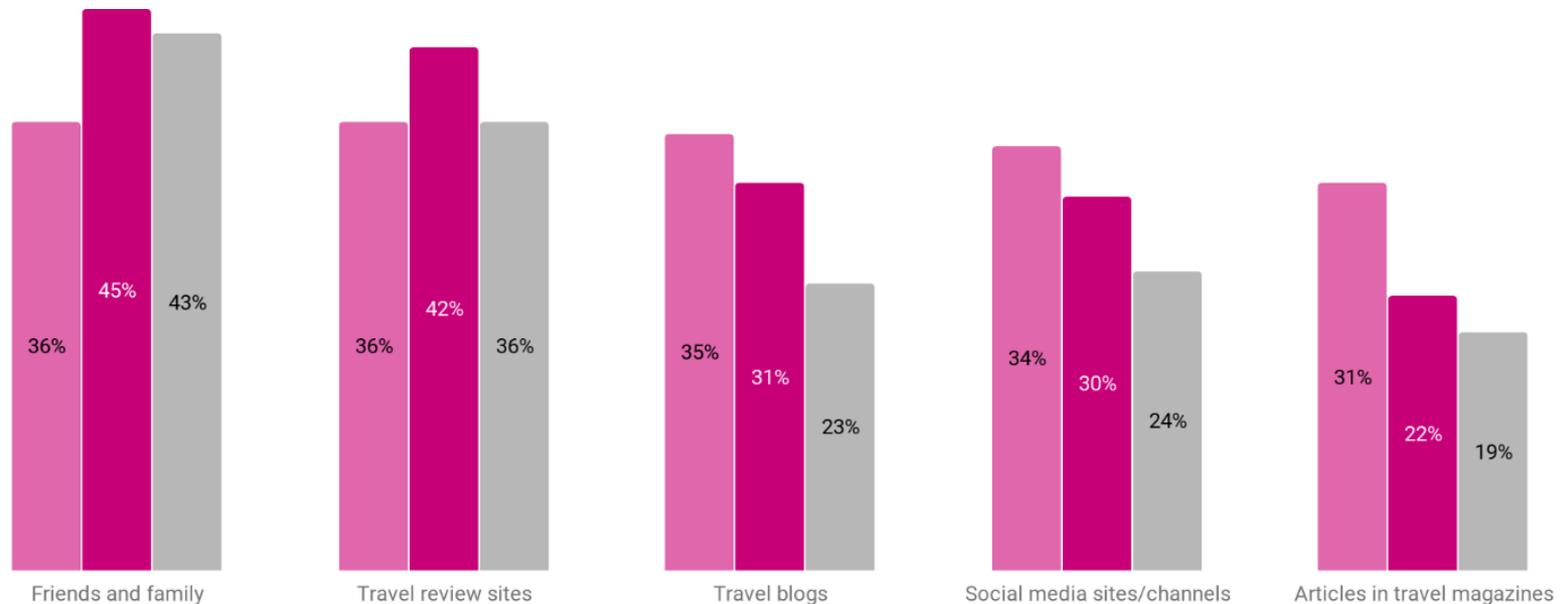


TOP 5 PRIMARY MOTIVATORS FOR LAST TRIP

■ USA ■ AUS ■ AVG

ADVENTURE INTENSIVE: LAST TRIP PLANNING

As with other traveler segments, **friends and family** and **review sites** were the most important information sources for planning Adventure Intensives' last trips. They can particularly be targeted through **travel blogs**, **social media** and **travel magazines**. Travel review sites are particularly important for Australians.

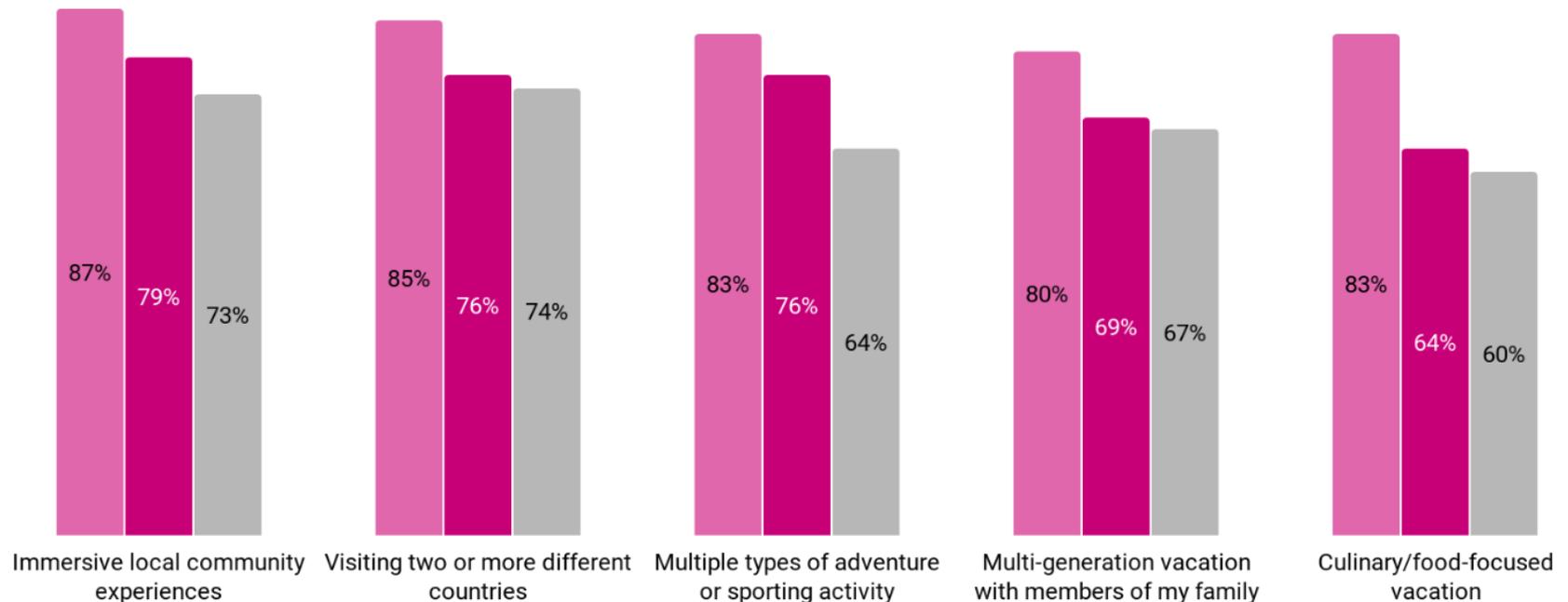


TOP 5 PLANNING TOOLS FOR LAST TRIP

■ USA ■ AUS ■ AVG

ADVENTURE INTENSIVE: NEXT TRIP

Adventure Intensives are more likely than all other travelers to take all kinds of specialized trips. These especially appeal to Americans, particularly trips with **immersive experiences** and **multiple types of activities**. For Americans, market **multi-country trips**, **multi-generational opportunities** and the **culinary specialties** of a destination.



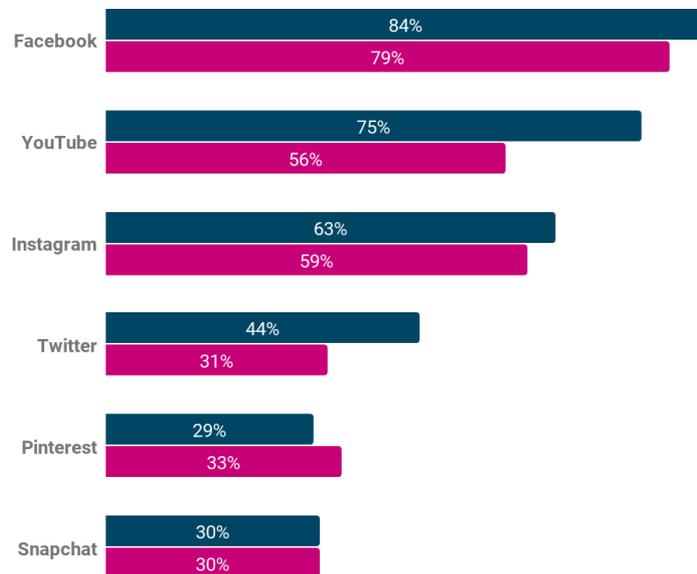
LIKELY TO TAKE THIS KIND OF TRIP IN THE NEXT TWO YEARS

■ USA ■ AUS ■ AVG

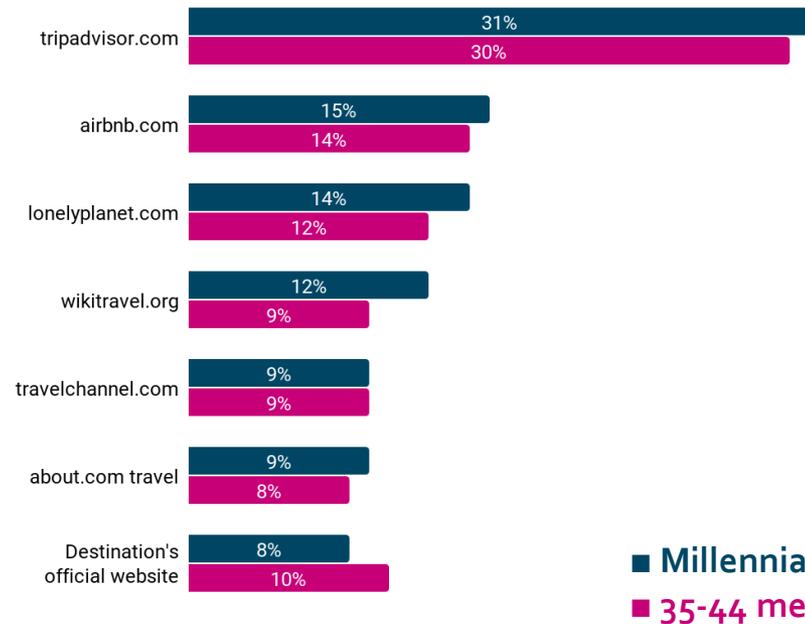
ADVENTURE INTENSIVE: SPOTLIGHTS

This segment comprises both single Millennials and the adventurous 35-44 year-old man with his spouse and children. Millennials are somewhat more likely to use Snapchat and Instagram and somewhat less likely to use Twitter, but Facebook and YouTube are the primary channels across all age groups. When it comes to influential websites, there is less differentiation across ages with TripAdvisor dominant.

INFLUENTIAL SOCIAL MEDIA CHANNELS



INFLUENTIAL WEBSITES



ADVENTURE INTENSIVE: RECOMMENDATIONS

Adventure Intensives love to push their limits on both adventure and cultural activities during a trip. They like to use expert guides, are eager to learn new things and seek all kinds of new experiences to expand their worldview.

GENERAL PRODUCT RECOMMENDATIONS

Adventure intensives are experienced in their adventure activities of choice and want a product that will test their abilities. A little risk, danger and discomfort is welcome. They seek:

- Expert guides that have technical knowledge of specific adventure activities;
- Technically rated and professional adventure activities that offer a challenge;
- Adrenaline-focused experiences that requires fitness;
- Australia: motorized sports, off-road buggy and kayaking/white water rafting;
- USA: mountain climbing, road cycling, skydiving and zip-lining;
- Cultural activities should seek to connect travelers with local lifestyles and authentic experiences.

GENERAL MARKETING RECOMMENDATIONS

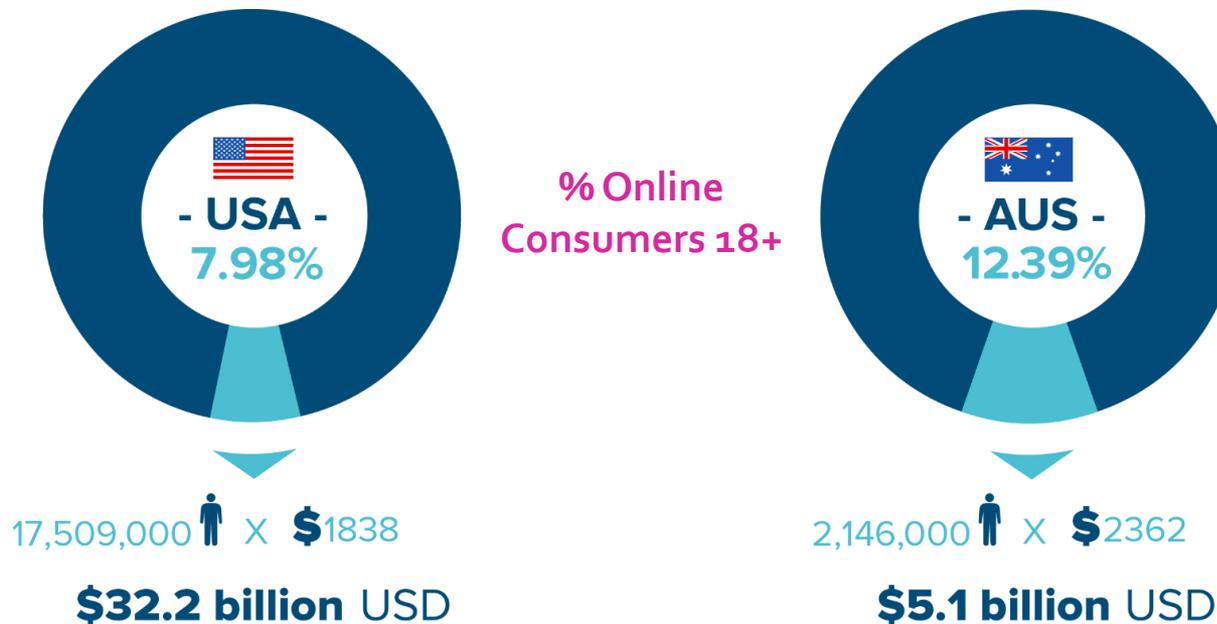
- Market experiences with a higher dose of adventure activity to this segment. They are keen to be challenged.
- Connect with them emotionally in marketing content by addressing their desire to push their limits. Highlight rugged and rustic elements, these travelers will see this as a positive element, not a negative.
- Use authentic images that show the destinations as peaceful, mysterious, enigmatic and unspoiled.
- Place marketing in social media, on blogs and *National Geographic Traveler*.
- As they are active social media users, leverage social media with a focus on Twitter for older Adventure Intensives and Instagram for younger ones.

MEET THE SEGMENTS: EXPERIENCE SAMPLER

EXPERIENCE SAMPLER PROFILE

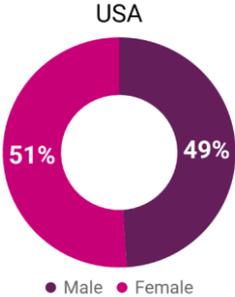
Experience Samplers are composed of two groups. Both are slightly more female with the younger group (18-24 years old) having lower incomes and education levels and more likely to live on their own. The older group (45-54 years old) has higher incomes and education and more likely to be married and living with a spouse and possibly children.

What ties them together are that both groups are interested in learning new things and having new experiences. While they are not competitive, they have an interesting relationship to risk. Experience Samplers want to get the most out of life. They talk about taking risks and like experiences with an element of danger – although what they perceive to be “dangerous” might not actually be that risky. They are looking for excitement and are generally interested in culture, but do not want to sacrifice comfort in the process.



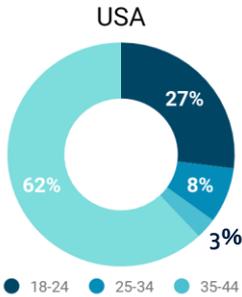
Spend per trip based on median of survey responses

EXPERIENCE SAMPLER: DEMOGRAPHICS



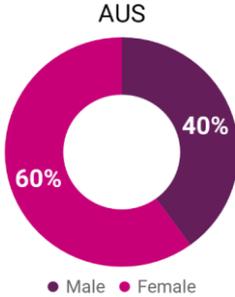
● Male ● Female

GENDER

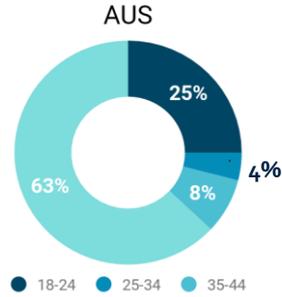


● 18-24 ● 25-34 ● 35-44 ● 45-54

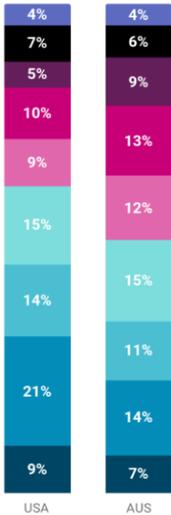
AGE



● Male ● Female

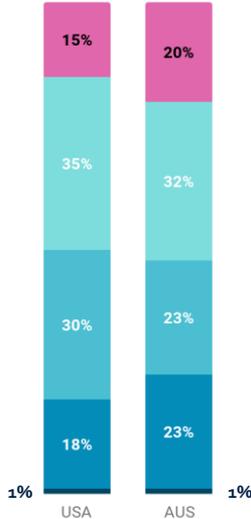


● 18-24 ● 25-34 ● 35-44 ● 45-54



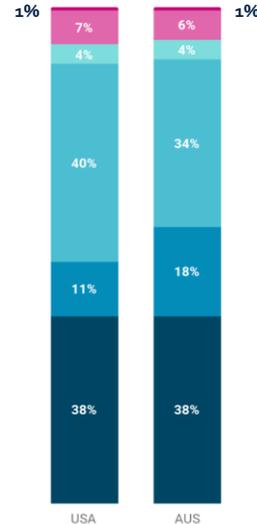
INCOME*

- \$200,000 or more
- \$150,000 - \$199,999
- \$125,000 - \$149,999
- \$100,000 - \$124,999
- \$80,000 - \$99,999
- \$60,000 - \$79,999
- \$40,000 - \$59,999
- \$20,000 - \$39,999
- Less than \$19,999



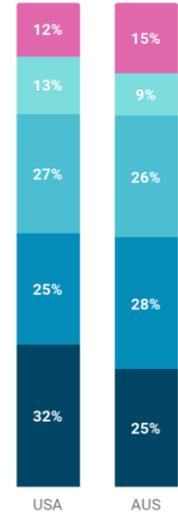
EDUCATION*

- Post-graduate degree
- Graduated college or university
- Some college or university
- High school
- Less than high school



MARITAL STATUS**

- Widowed
- Divorced
- Married and separated from husband/wife
- Married and living with husband/wife
- Living with partner
- Single



HOME LIFE**

- With friends or roommates
- With my partner, and children 16 or over
- With my partner, and children under 16
- Just with my partner
- On my own

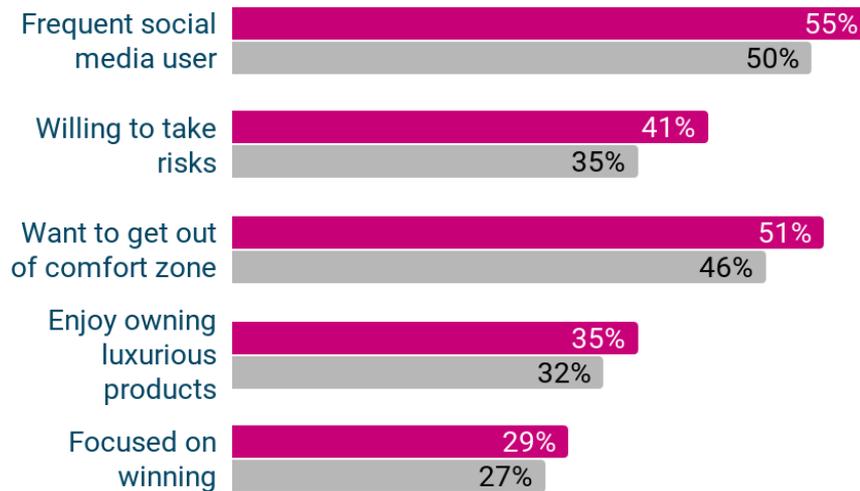
*Remaining % chose not to respond.

**Totals may not equal 100% due to rounding.

EXPERIENCE SAMPLER: PERSONALITY PROFILE

Market to Experience Samplers by showing a wide variety of activities – both adventure and cultural – available in one destination. Give them a chance to get out of their comfort zone in a way they view as safe and offer opportunities to connect to the local community.

VIEW OF SELF



■ Experience Sampler
■ Average Traveler

BENEFITS OF ADVENTURE TRAVEL



BENEFITS OF CULTURAL TRAVEL

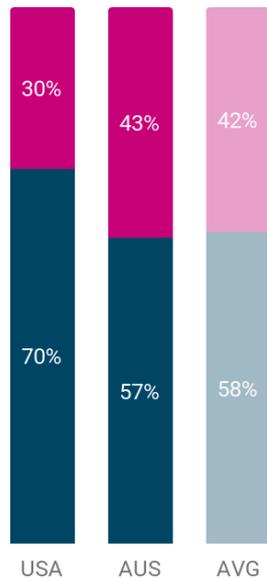


■ Experience Sampler
■ Average Traveler

Top 3 responses that differ most from average rating scores out of 5.

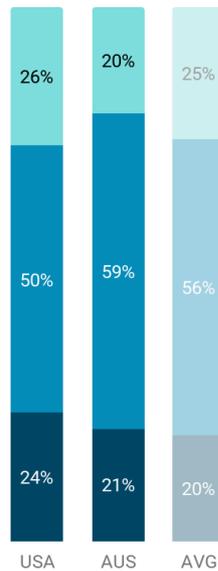
EXPERIENCE SAMPLER: ADVENTURE ACTIVITY PARTICIPATION

Experience Samplers are **motivated** by adventure activities, especially American males. They lean toward **soft adventure** activities. They have **a few activities they participate in regularly** and are willing to do these during a trip. Australians are slightly more likely to participate in hard adventure activities.



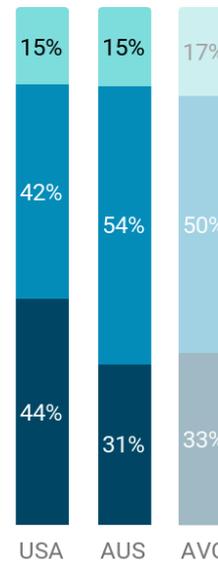
ADVENTURE AS PRIMARY TRIP MOTIVATOR

- No
- Yes



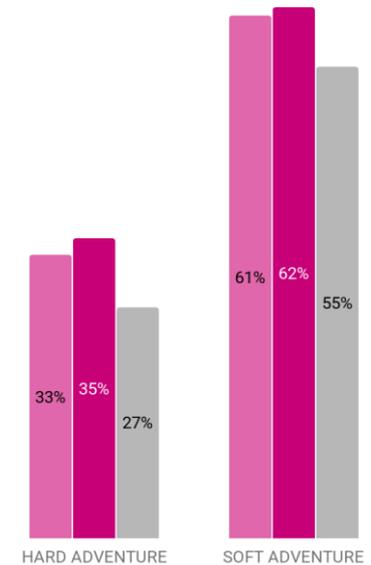
ACTIVITY EXPERIENCING

- Usually try new activities
- Usually do just a few different activities
- Usually do the same activity



ACTIVITY FREQUENCY

- This was a one-off during a trip
- I do them every now and again
- I do them regularly



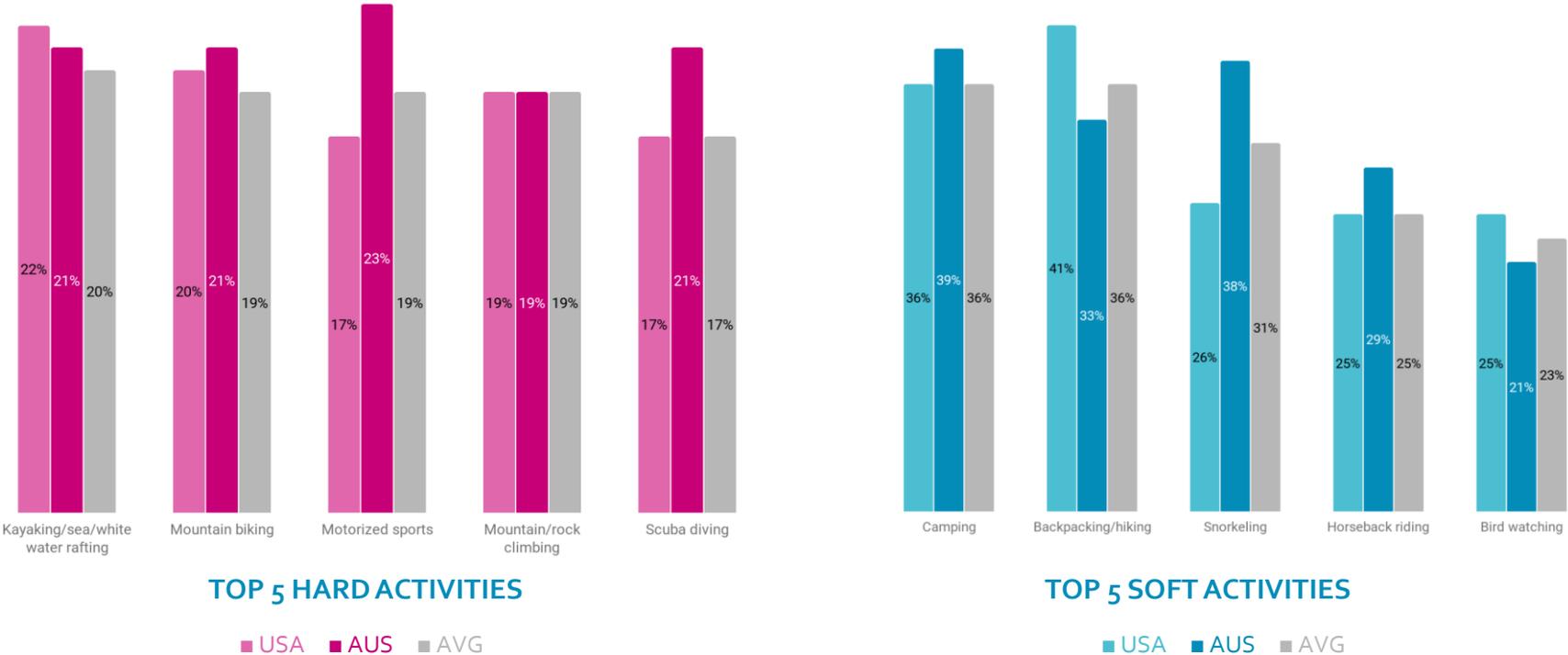
ACTIVITY PARTICIPATION*

- USA
- AUS
- AVG

*Percentage of respondents who participated in this type of activity during a recent trip.

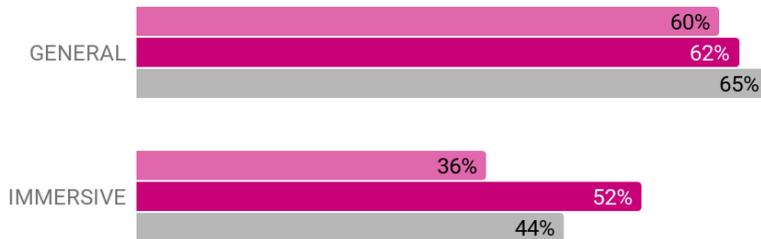
EXPERIENCE SAMPLER: ADVENTURE ACTIVITY PARTICIPATION

Australian and American Experience Samplers are quite similar, except Australians prefer motorized sports, scuba diving and snorkeling more, and Americans prefer backpacking and birdwatching slightly more.



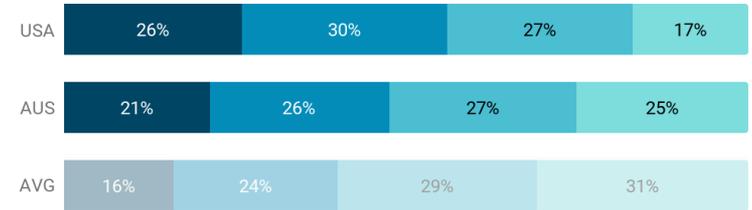
EXPERIENCE SAMPLER: CULTURAL ACTIVITY PARTICIPATION

Experience Samplers like cultural activities about as much as the average traveler, with **Australians enjoying immersive experiences more than Americans**. Americans tend to do cultural activities **more frequently in their daily lives** and are more likely to say they **learned a great deal** as a result of a cultural trip.



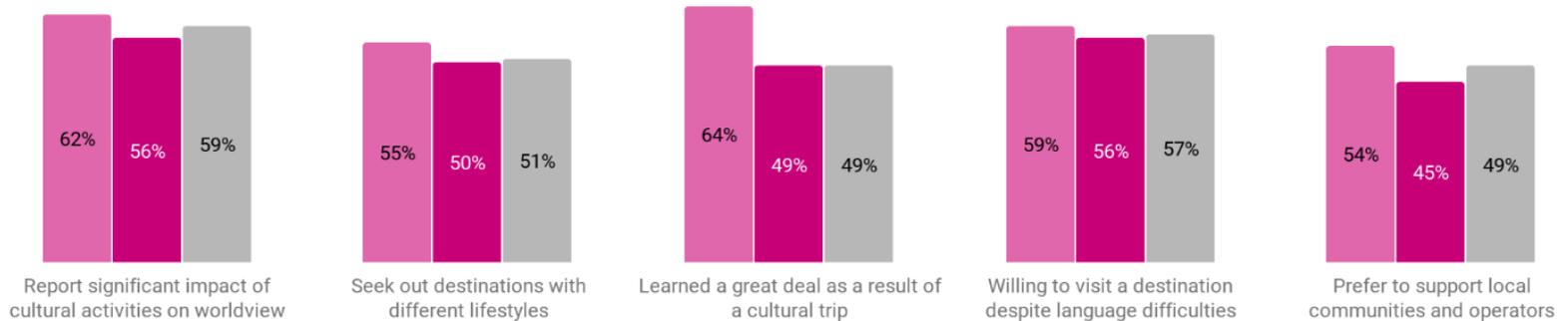
ACTIVITY PREFERENCES

■ USA ■ AUS ■ AVG



ACTIVITY FREQUENCY

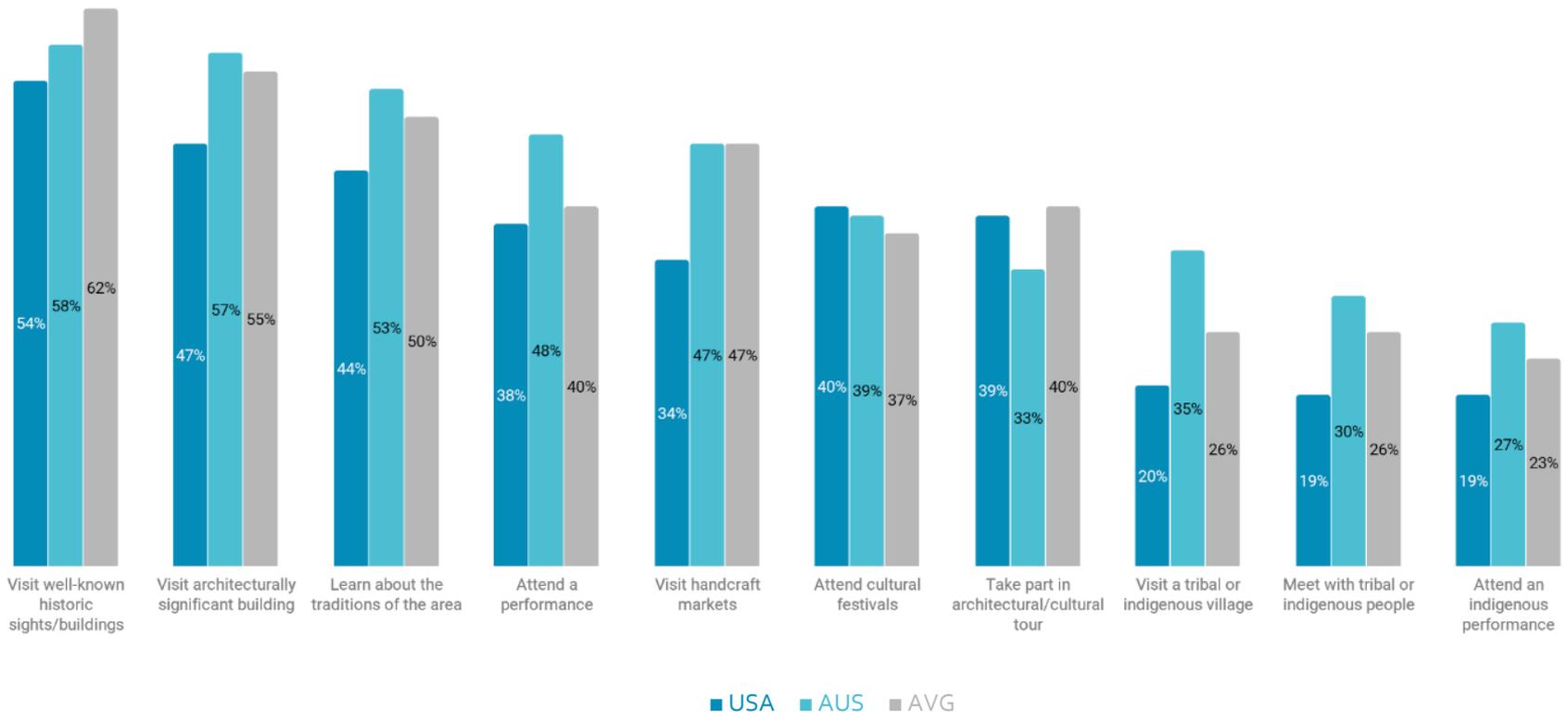
■ A few times a year or less ■ About once a week
 ■ Once or twice a month ■ More than once a week



■ USA ■ AUS ■ AVG

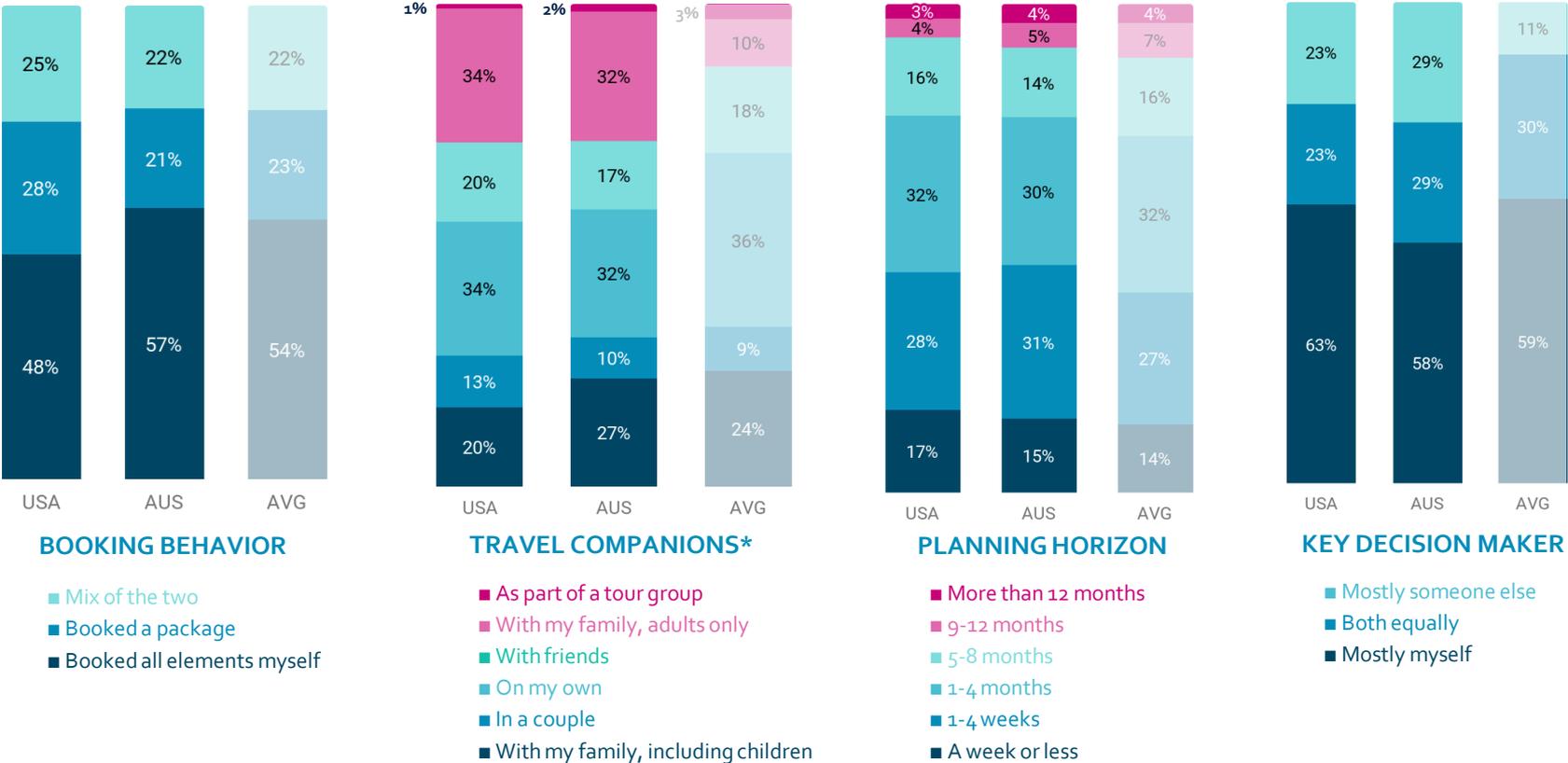
EXPERIENCE SAMPLER: CULTURAL ACTIVITY PARTICIPATION

Although Americans report a higher impact of cultural activities on their knowledge and worldview, they tend to actually participate less in these while traveling. This may be due to their propensity to do cultural activities more frequently in their daily lives (see previous page), leaving them to seek different experiences during a trip.



EXPERIENCE SAMPLER: TRAVEL PROFILE

Experience Samplers are more likely than average to travel with their family (adults only) and less likely to travel with children. This may be due to their dichotomous age groups of 18-24 (single without children) and 45+ (married with older children). Their other behavior is relatively typical of the average adventure and cultural traveler.

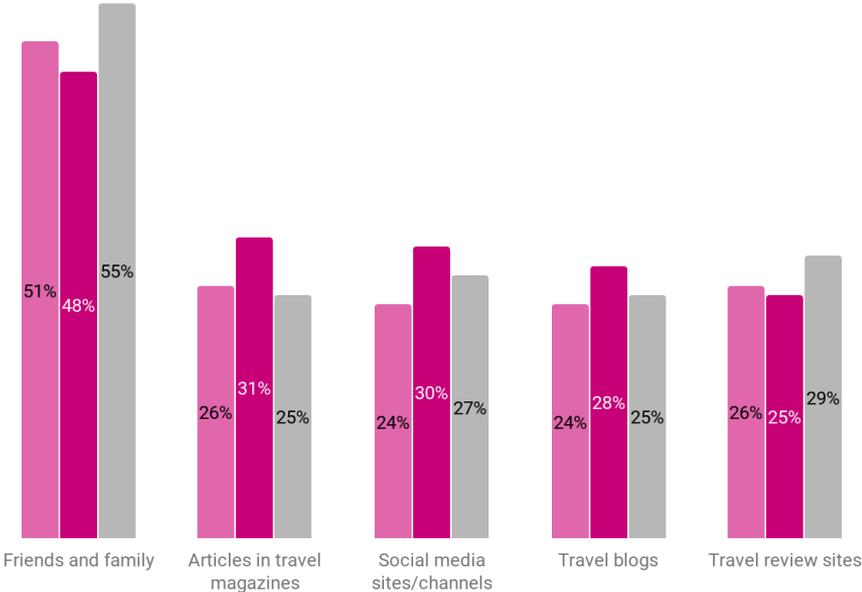


*Totals may not equal 100% due to rounding.

(time taken to finalize itinerary and book once destination selected)

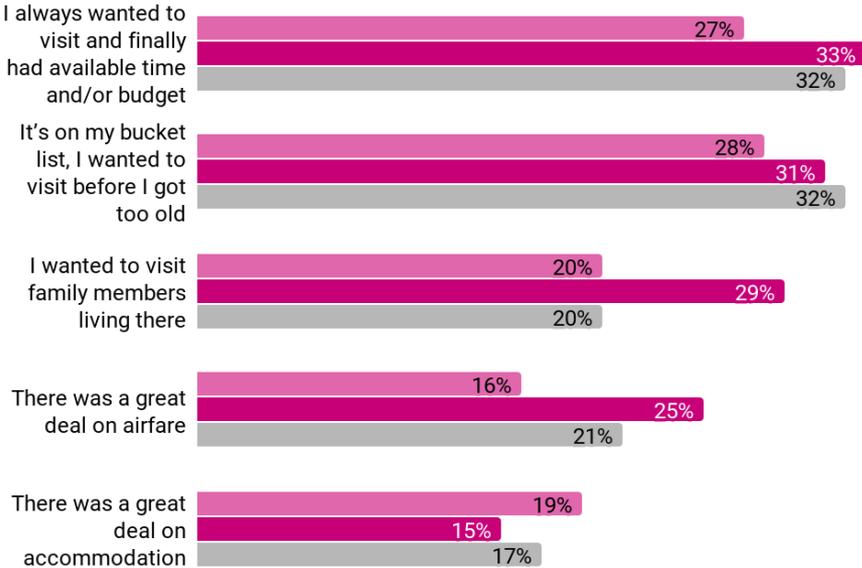
EXPERIENCE SAMPLER: DREAMING

This group most frequently looks to friends and family for travel inspiration. Australian Experience Samplers are more likely to visit family members living abroad and are attracted by great deals on airfare. Americans are also motivated slightly more than average by great deals on accommodation.



TOP 5 TRAVEL INSPIRATION

■ USA ■ AUS ■ AVG

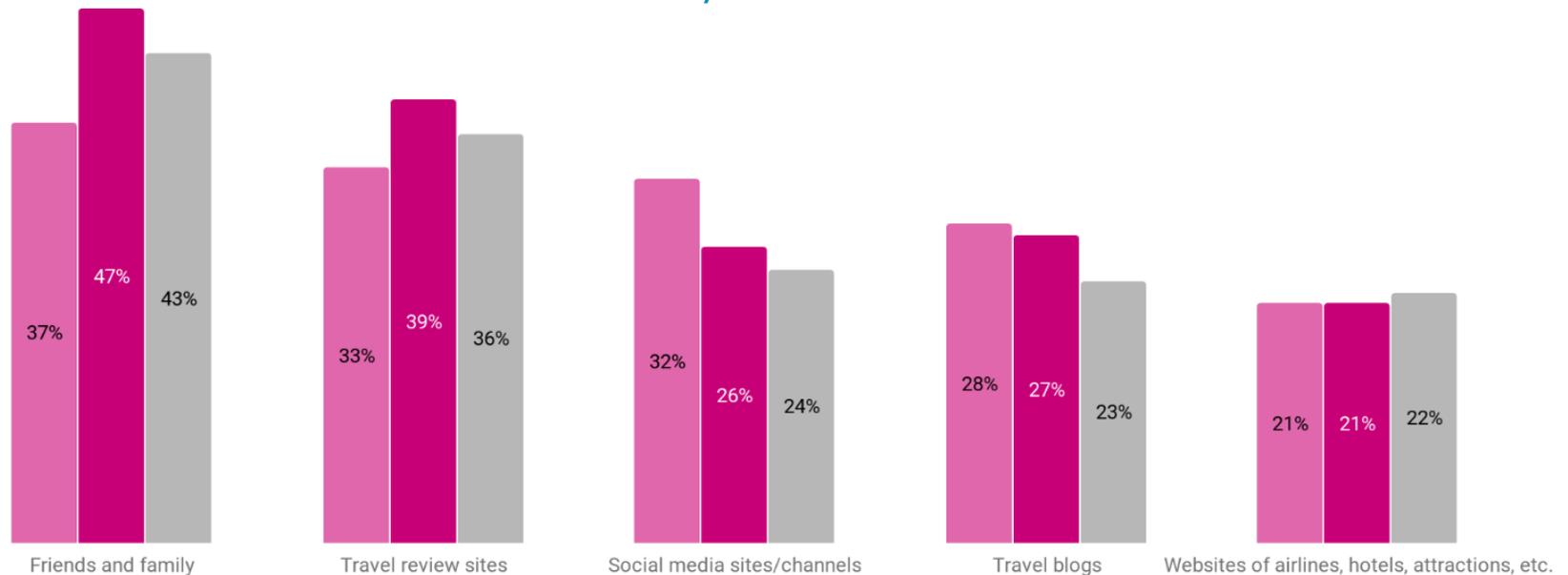


TOP 5 PRIMARY MOTIVATORS FOR LAST TRIP

■ USA ■ AUS ■ AVG

EXPERIENCE SAMPLER: LAST TRIP PLANNING

As with other traveler segments, **friends and family** and **review sites** were Experience Samplers' most important information sources for planning their last trips. They can particularly be targeted through **social media**, **travel blogs** and **airline/hotel/attraction websites**. American Experience Samplers are more likely to use social media and Australians are more likely to turn to friends and family and travel review sites.

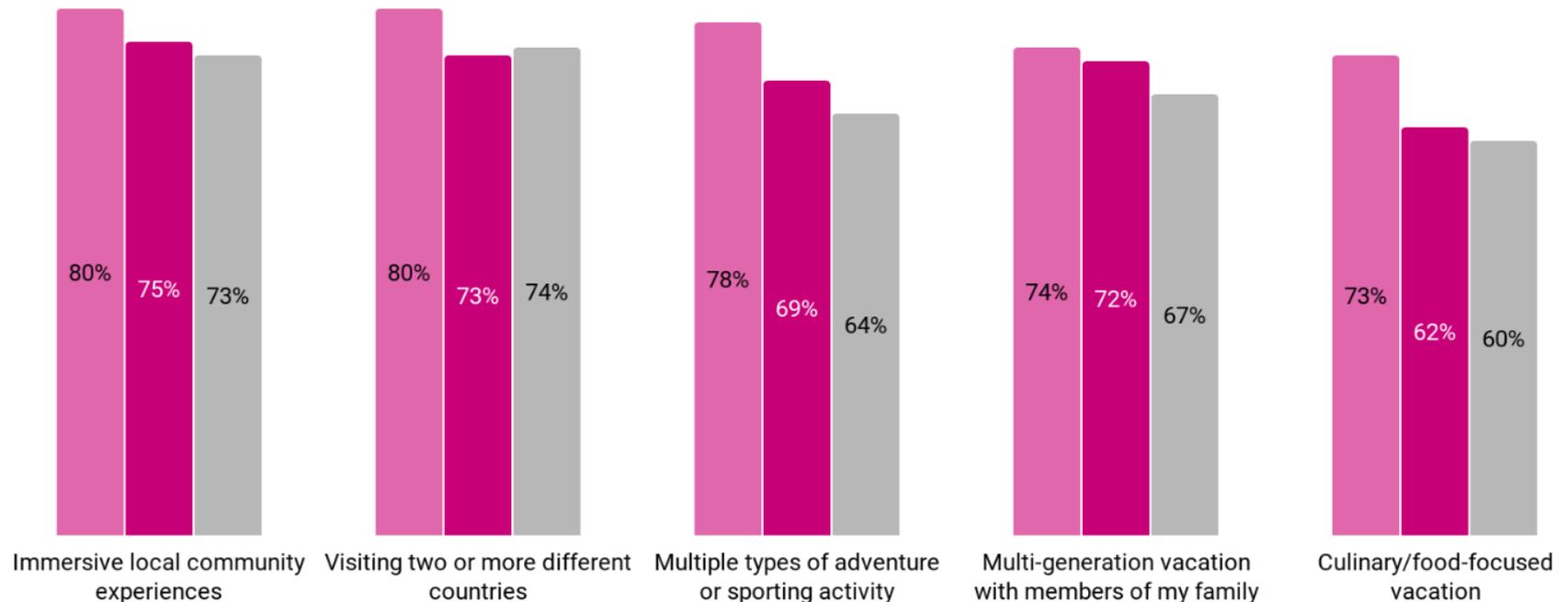


TOP 5 PLANNING TOOLS FOR LAST TRIP

■ USA ■ AUS ■ AVG

EXPERIENCE SAMPLER: NEXT TRIP

Experience Samplers are more likely to take specialized trips with immersive experiences and multiple types of activities. For Americans, market multi-country or multi-destination trips, multi-generational opportunities and culinary specialties.



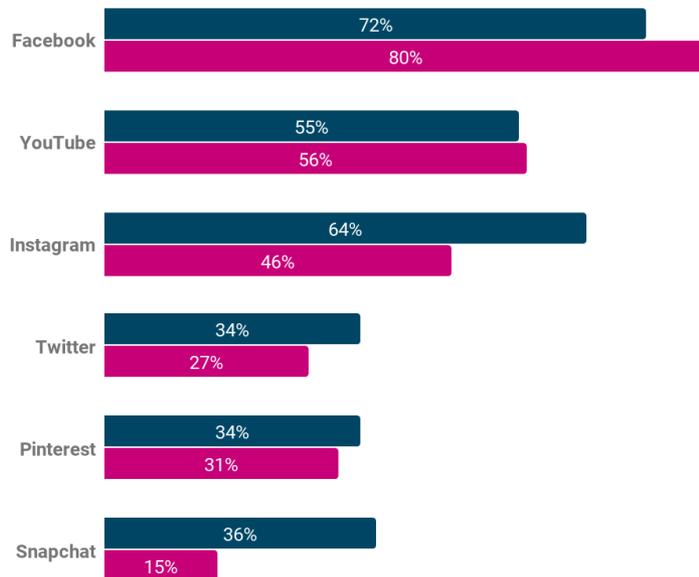
LIKELY TO TAKE THIS KIND OF TRIP IN THE NEXT TWO YEARS

■ USA ■ AUS ■ AVG

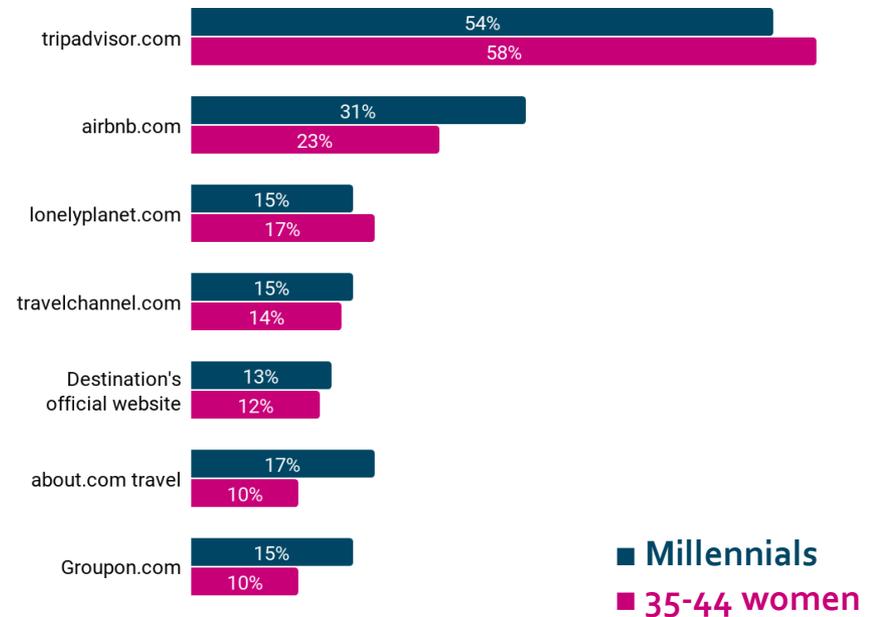
EXPERIENCE SAMPLER: SPOTLIGHTS

This segment comprises both single Millennials and the middle-aged woman and her spouse. Millennials are much more likely to use Snapchat and somewhat less likely to use Facebook, but Facebook, YouTube, and Instagram are the primary channels across all age groups. When it comes to influential websites, the older groups relies more on TripAdvisor while the younger group uses Airbnb more

INFLUENTIAL SOCIAL MEDIA CHANNELS



INFLUENTIAL WEBSITES



EXPERIENCE SAMPLER: RECOMMENDATIONS

Experience Samplers see themselves as explorers. They like to sample a variety of both adventure and cultural activities and want to share those experiences on social media. They place less value on enriching their knowledge through travel than on getting the most out of the trip and maximizing their experience.

GENERAL PRODUCT RECOMMENDATIONS

Experience Samplers see themselves as explorers and risk takers, but also desire a level of safety in their experiences. They like to sample both adventure and cultural activities. They seek:

- Itineraries that mix both culture and soft adventure activities;
- Tour operators adhering to social and environmental standards;
- Village based activities that do not involve staged performances but rather authentic interactions;
- Adventure activities: camping, horseback riding, kayaking/white water rafting or scuba diving; and
- Cultural activities: Indigenous or tribal village home stays, cultural festivals, local language classes or archeology field trips.

GENERAL MARKETING RECOMMENDATIONS

- Market experiences that mix adventure and cultural activities together to this segment.
- Connect with them emotionally by emphasizing the newness and excitement of the experiences they can have in unexplored destinations.
- As they are active users, leverage social media with a focus on YouTube for both groups, Snapchat for the younger group and Facebook for the older group.

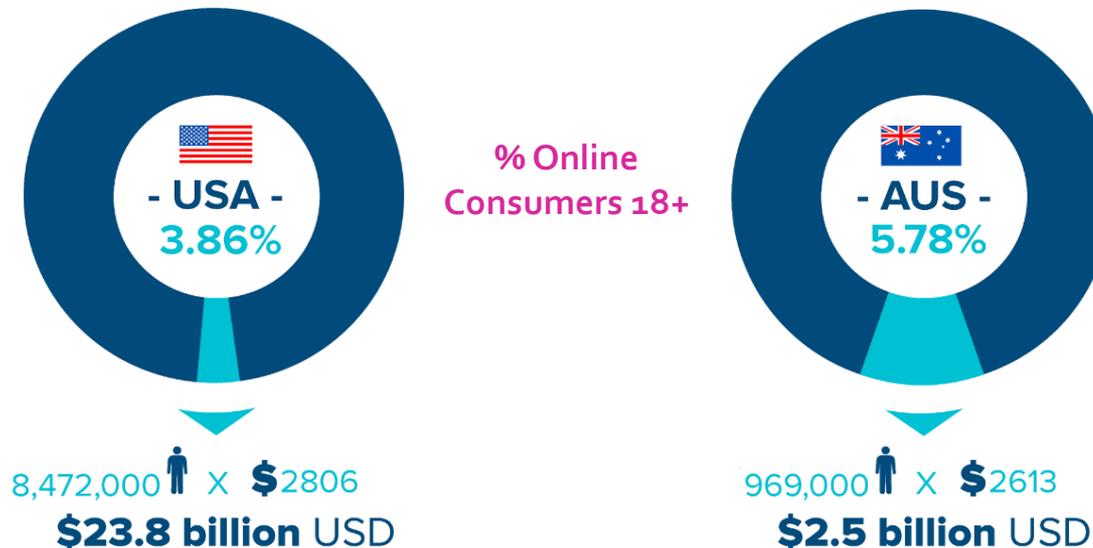
MEET THE SEGMENTS: CULTURAL EXPLORERS

CULTURAL EXPLORERS PROFILE

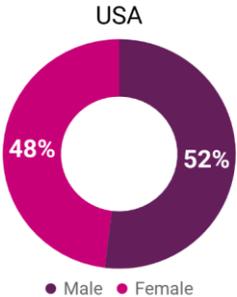
Cultural Explorers are older travelers (55+ years old) and just slightly more male. The majority are in middle income households and are more highly educated than average. This segment is very frequently married and living with their spouse (no children in the house) or sometimes alone.

Cultural Explorers are very interested in learning new things and actively seeking new experiences. They are not risk takers nor competitive, and enjoy nature and scenery more than average.

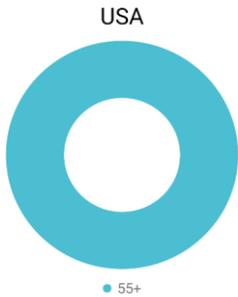
Cultural Explorers are the most interested in engagement with cultural experiences and enriching their knowledge. This segment looks for destinations where the culture and lifestyle is different from their own and do not mind a language barrier.



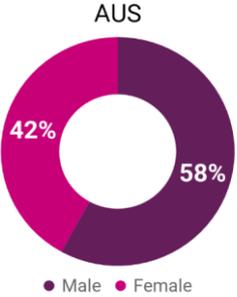
CULTURAL EXPLORER: DEMOGRAPHICS



GENDER



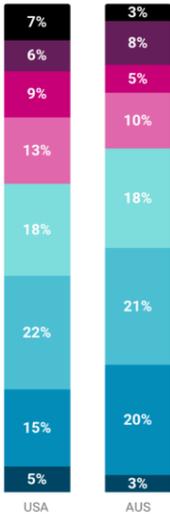
AGE



Male Female

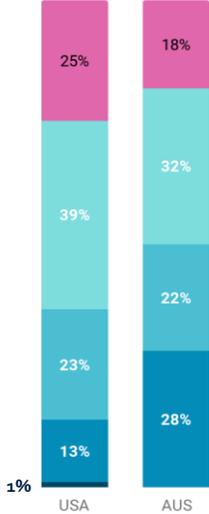


55+



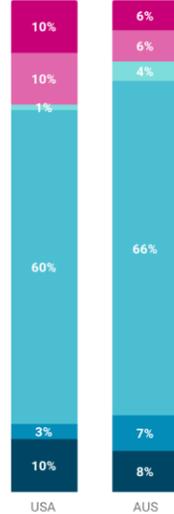
INCOME*

- \$200,000 or more
- \$150,000 - \$199,999
- \$125,000 - \$149,999
- \$100,000 - \$124,999
- \$80,000 - \$99,999
- \$60,000 - \$79,999
- \$40,000 - \$59,999
- \$20,000 - \$39,999
- <\$19,999



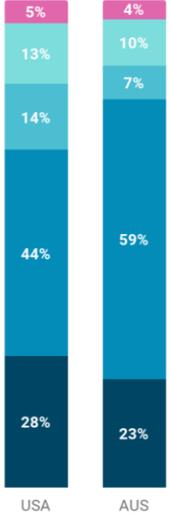
EDUCATION*

- Post-graduate degree
- Graduated college or university
- Some college or university
- High school
- Less than high school



MARITAL STATUS**

- Widowed
- Divorced
- Married and separated from husband/wife
- Married and living with husband/wife
- Living with partner
- Single



HOME LIFE**

- With friends or roommates
- With my partner, and children 16 or over
- With my partner, and children under 16
- Just with my partner
- On my own

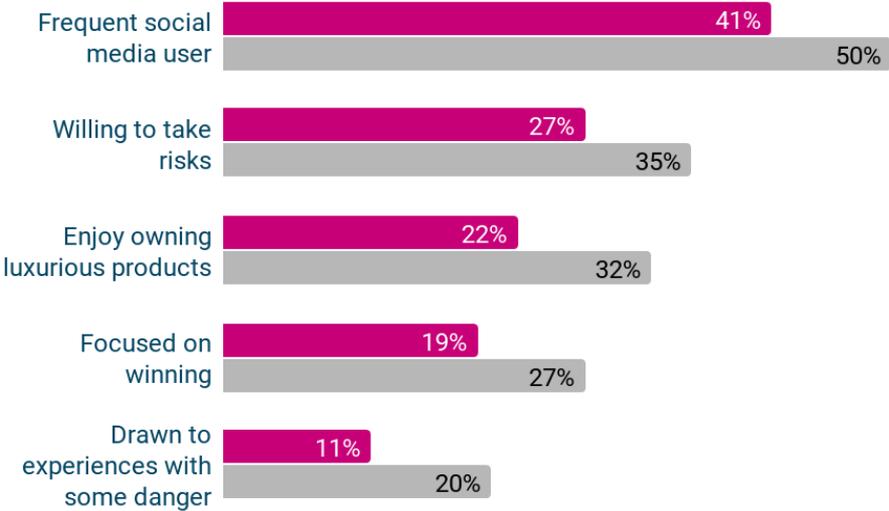
*Remaining % chose not to respond.

**Total may not equal 100% due to rounding.

CULTURAL EXPLORER: PERSONALITY PROFILE

Cultural Explorers want to have new experiences and learn new things, while **enjoying nature** and taking the time to **contemplate life**. Cultural Explorers rate lower than average on social media use, luxury product enjoyment and factors related to risk, winning and danger. They appreciate the **overall experience** from travel.

VIEW OF SELF



■ Cultural Explorer
■ Average Traveler

BENEFITS OF ADVENTURE TRAVEL



BENEFITS OF CULTURAL TRAVEL

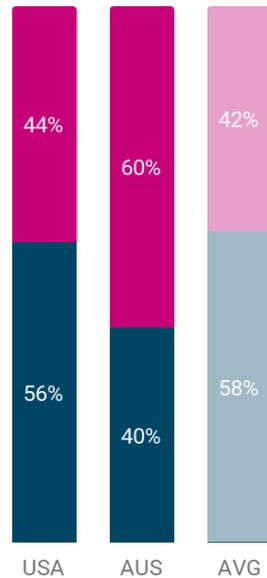


■ Cultural Explorer
■ Average Traveler

Top 3 responses that differ most from average rating scores out of 5.

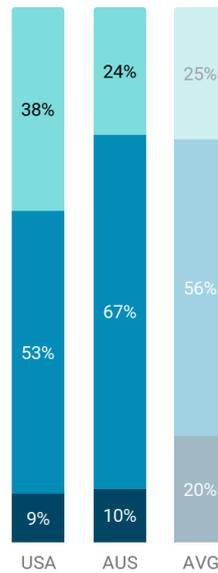
CULTURAL EXPLORER: ADVENTURE ACTIVITY PARTICIPATION

Cultural Explorers are not very motivated by adventure activities and do not care for hard adventure. They do a few different activities every now and again, and Americans in particular are willing to do some soft adventure activities.



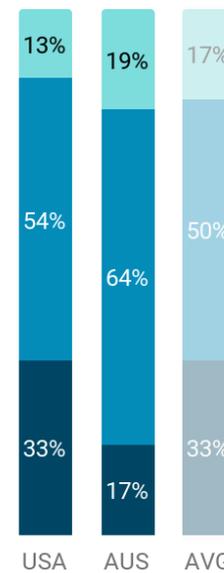
ADVENTURE AS PRIMARY TRIP MOTIVATOR

- No
- Yes



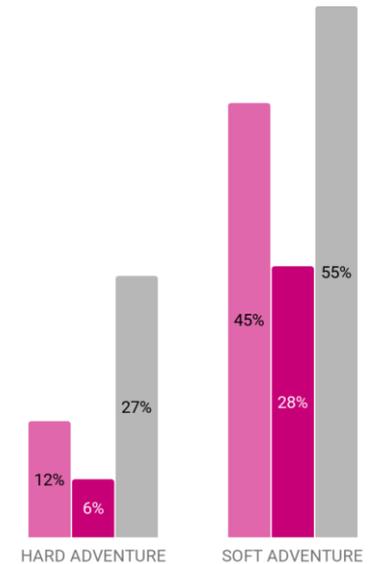
ACTIVITY EXPERIENCING

- Usually try new activities
- Usually do just a few different activities
- Usually do the same activity



ACTIVITY FREQUENCY

- This was a one-off during a trip
- I do them every now and again
- I do them regularly



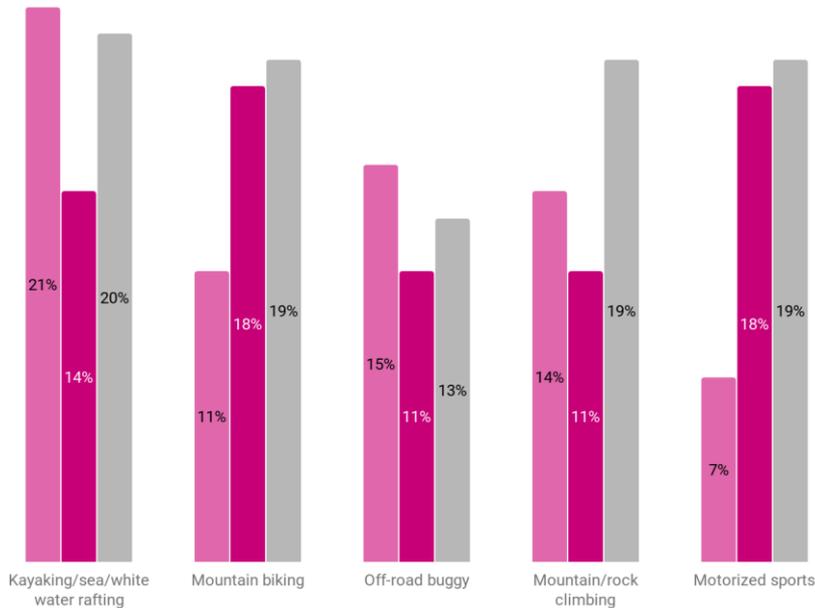
ACTIVITY PARTICIPATION*

- USA
- AUS
- AVG

*Percentage of respondents who participated in this type of activity during a recent trip.

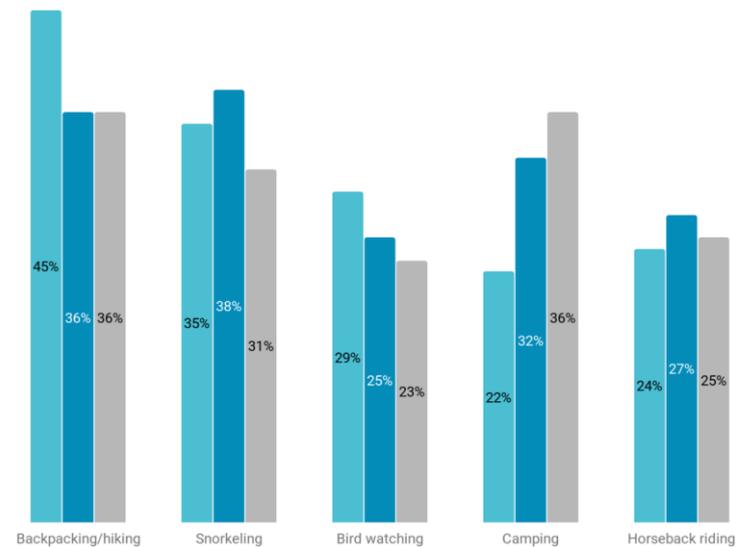
CULTURAL EXPLORER: ADVENTURE ACTIVITY PARTICIPATION

Cultural Explorers are below average on almost every hard activity, although Americans will go kayaking and off-road buggy riding and Australians will try mountain biking. American Cultural Explorers appreciate a hike, and both like snorkeling and birdwatching, but otherwise they are not very enthused about physical adventure activities.



TOP 5 HARD ACTIVITIES

■ USA ■ AUS ■ AVG

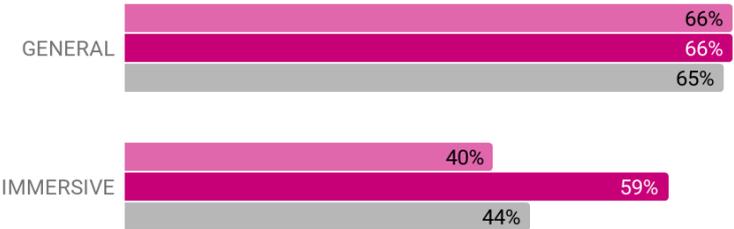


TOP 5 SOFT ACTIVITIES

■ USA ■ AUS ■ AVG

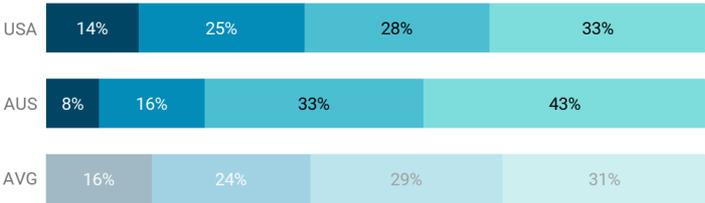
CULTURAL EXPLORER: CULTURAL ACTIVITY PARTICIPATION

Cultural Explorers travel to learn, especially Americans. They seek destinations with different lifestyles and languages and prefer to support local communities and operators. This segment is most likely to report a significant impact of cultural activities on their worldview. Australians in particular prefer immersive experiences.



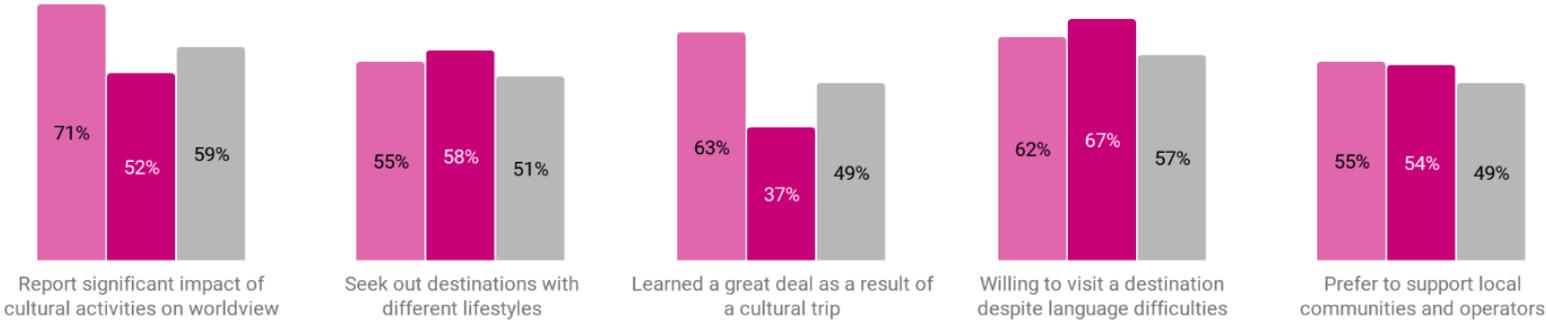
ACTIVITY PREFERENCES

■ USA ■ AUS ■ AVG



ACTIVITY FREQUENCY

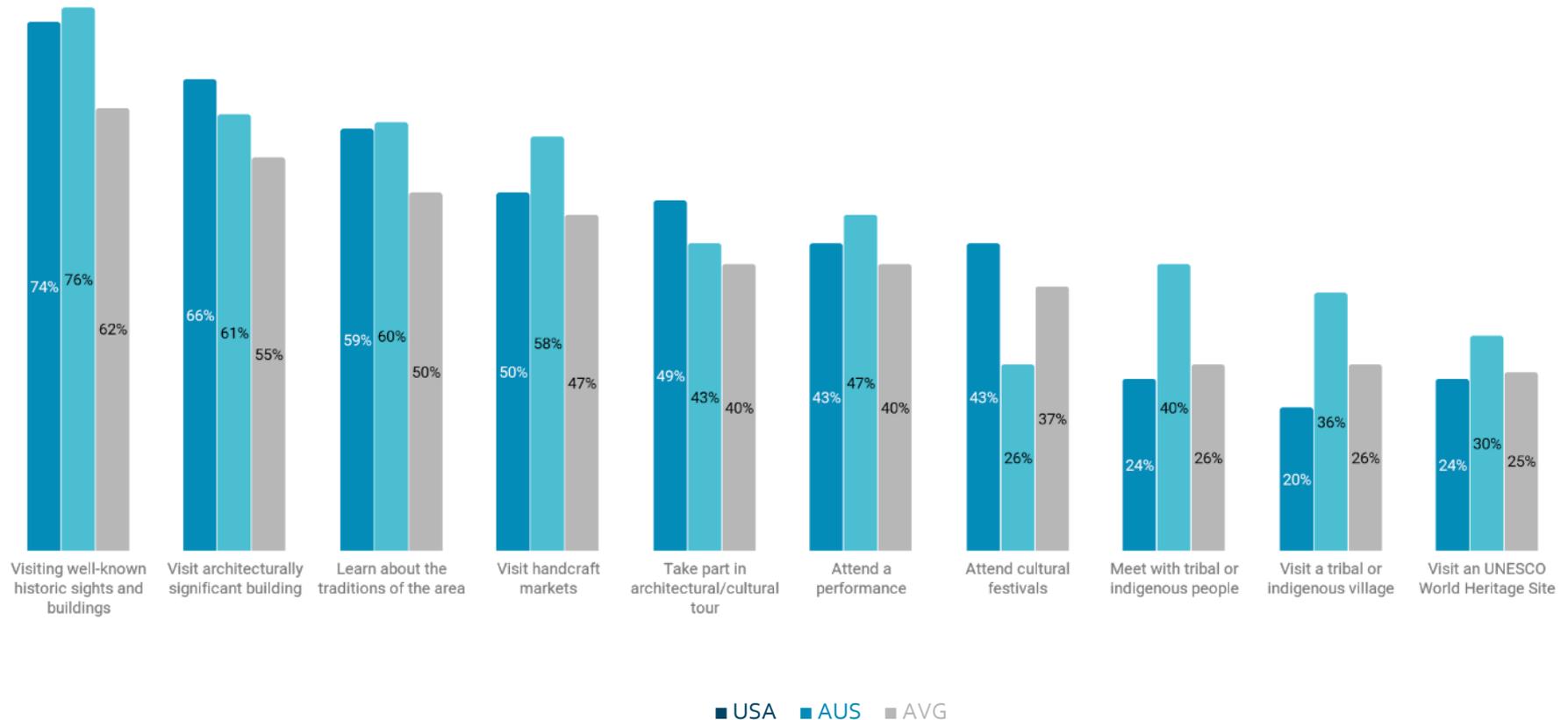
■ A few times a year or less ■ About once a week
 ■ Once or twice a month ■ More than once a week



■ USA ■ AUS ■ AVG

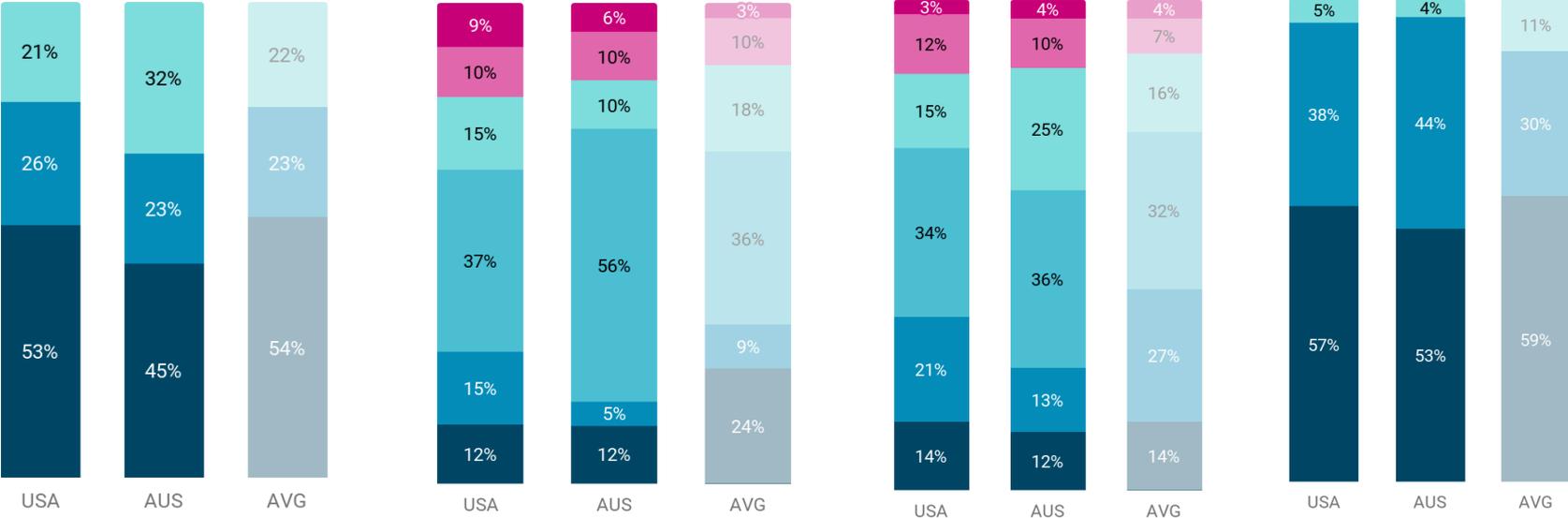
CULTURAL EXPLORER: CULTURAL ACTIVITY PARTICIPATION

Cultural Explorers rank either **average or above average on all cultural activities**. They particularly enjoy visiting well-known historic sites and architecturally significant buildings, and want to learn about the traditions of an area.



CULTURAL EXPLORER: TRAVEL PROFILE

Cultural Explorers tend to book all trip elements themselves, have a longer planning horizon, and make their own travel decisions. Australians in particular are more likely than average to travel on their own.



BOOKING BEHAVIOR

- Mix of the two
- Booked a package
- Booked all elements myself

TRAVEL COMPANIONS

- As part of a tour group
- With my family, adults only
- With friends
- On my own
- In a couple
- With my family, including children

PLANNING HORIZON

- More than 12 months
- 9-12 months
- 5-8 months
- 1-4 months
- 1-4 weeks
- A week or less

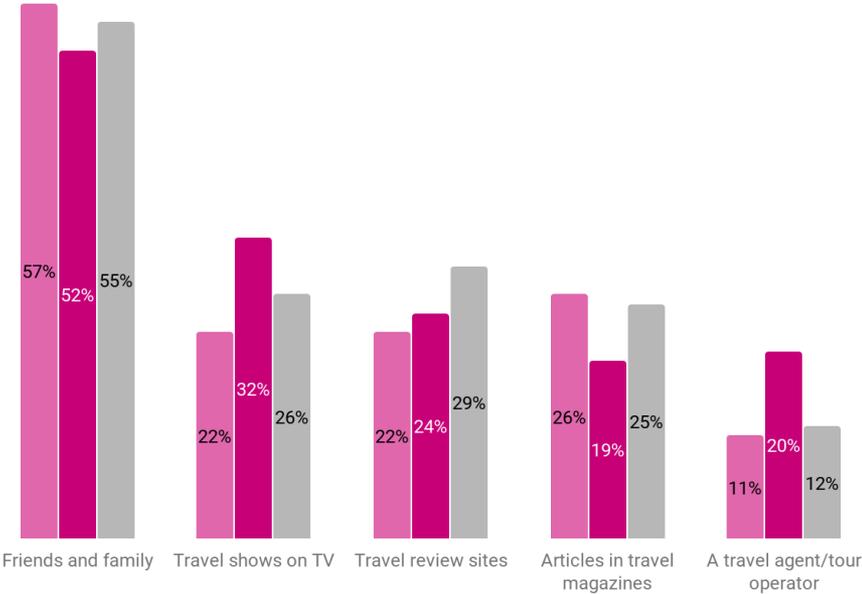
KEY DECISION MAKER

- Mostly someone else
- Both equally
- Mostly myself

(time taken to finalize itinerary and book once destination selected)

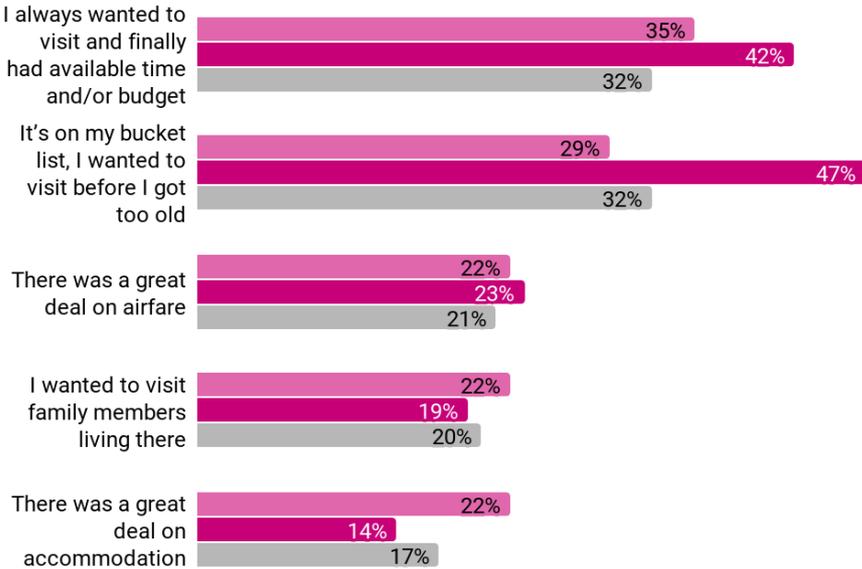
CULTURAL EXPLORER: DREAMING

Cultural Explorers most frequently look to friends and family for travel inspiration, but also watch travel shows on TV and turn to travel agents/tour operators. This group has dreamed of traveling for a long time and finally have the time and budget to go. Australians in particular have trips on their bucket list.



TOP 5 TRAVEL INSPIRATION

■ USA ■ AUS ■ AVG

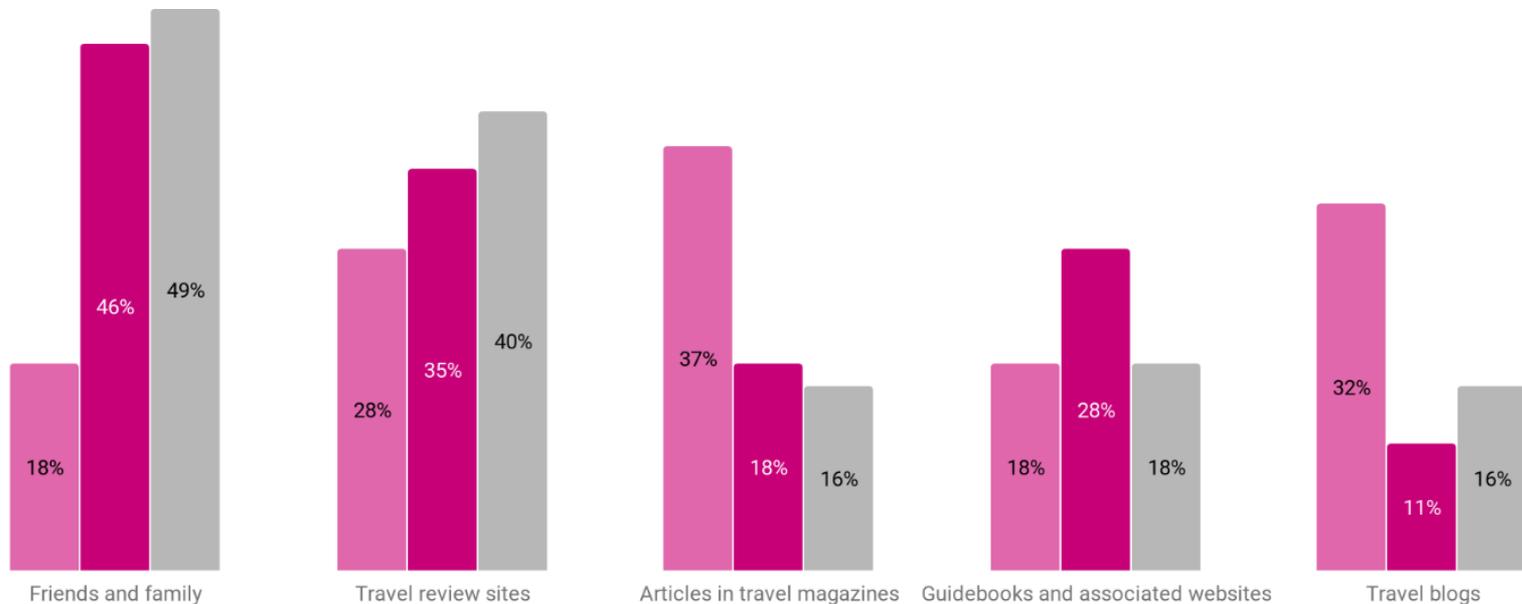


TOP 5 PRIMARY MOTIVATORS FOR LAST TRIP

■ USA ■ AUS ■ AVG

CULTURAL EXPLORER: LAST TRIP PLANNING

For Australians, as with other traveler segments, **friends and family** were the most important information sources for planning Cultural Explorers' last trips. Americans are much less likely to turn to friends and family and more likely to look to **travel magazines and travel blogs**. Review sites are less popular than average, but Australians do like **guidebooks and their associated websites**.

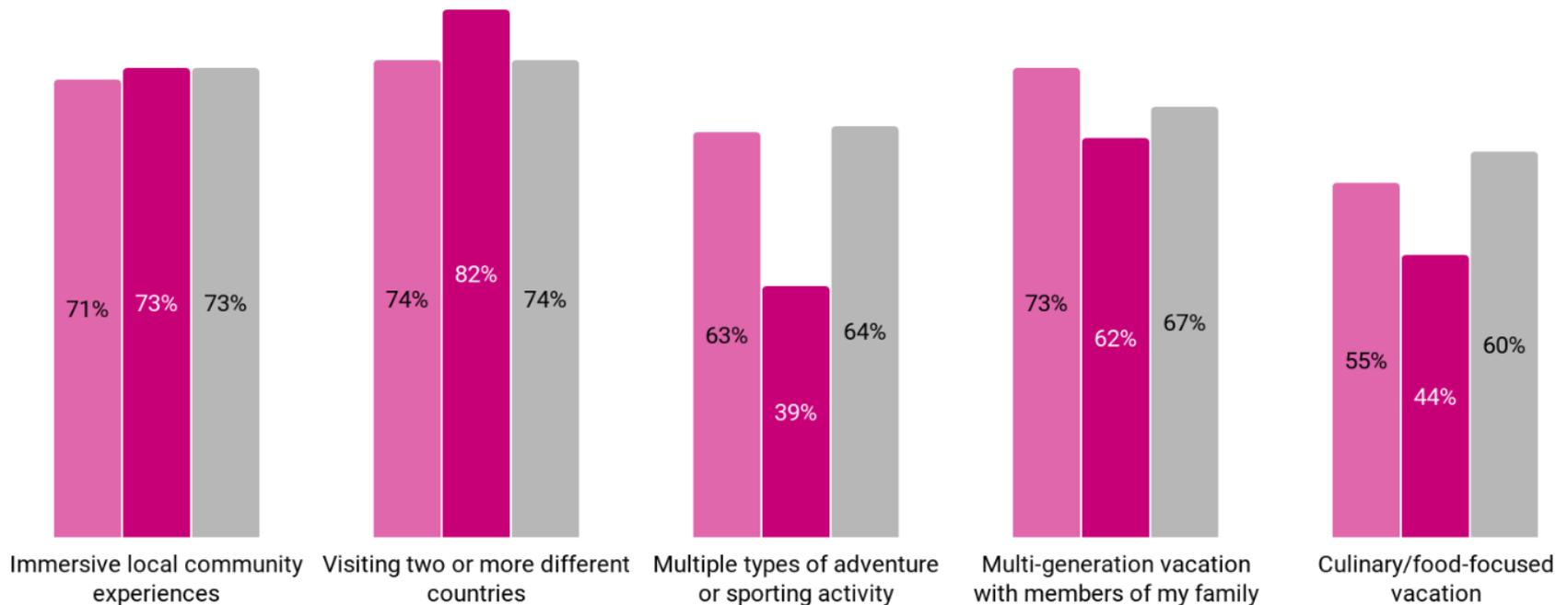


TOP 5 PLANNING TOOLS FOR LAST TRIP

■ USA ■ AUS ■ AVG

CULTURAL EXPLORER: NEXT TRIP

Cultural Explorers are of average likelihood to take all kinds of specialty trips, although Australians are less interested in multiple types of adventure or food-focused vacations.



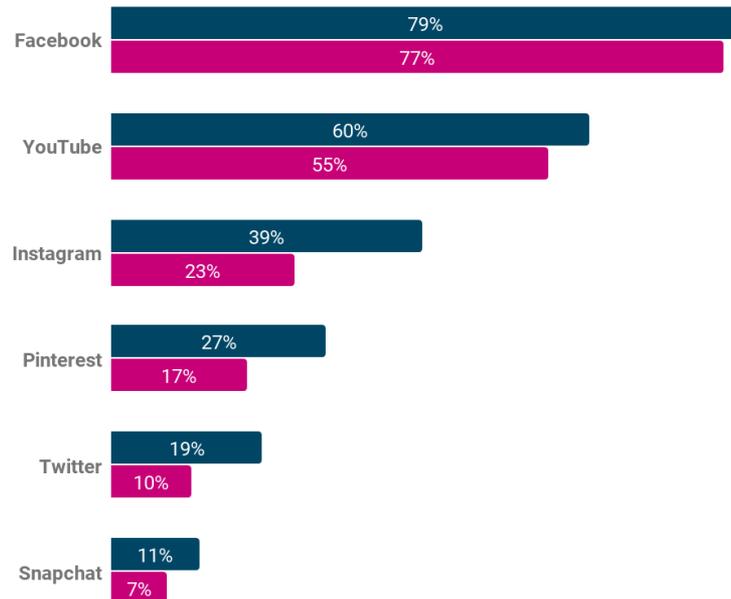
LIKELY TO TAKE THIS KIND OF TRIP IN THE NEXT TWO YEARS

■ USA ■ AUS ■ AVG

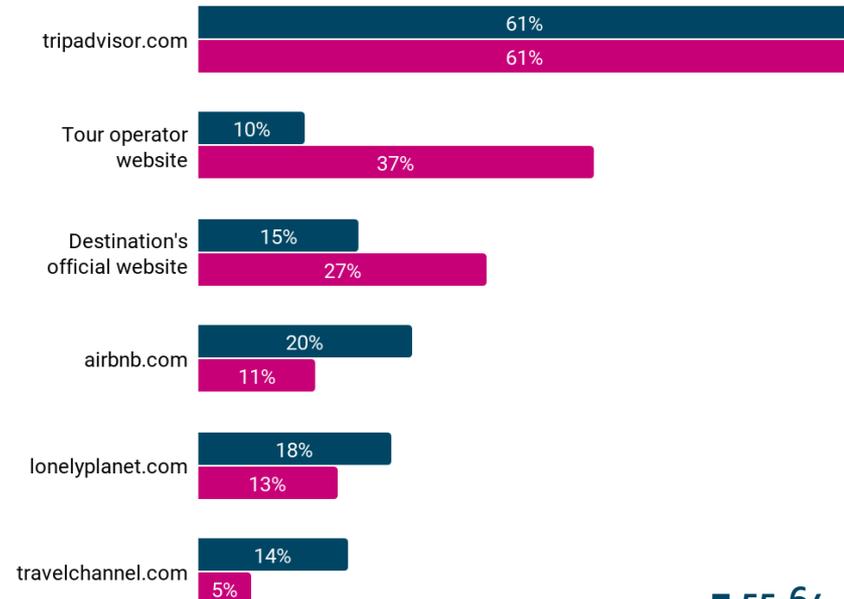
CULTURAL EXPLORER: SPOTLIGHTS

This segment is made up of older travelers, often empty nesters with their spouse or alone. Within the segment, those aged 55-64 are more likely to use social media than their older counterparts, who lean toward **tour operator websites** and the **destination's official website**.

INFLUENTIAL SOCIAL MEDIA CHANNELS



INFLUENTIAL WEBSITES



■ 55-64
■ 65+

CULTURAL EXPLORERS: RECOMMENDATIONS

Cultural Explorers do not want to take risks and are most likely to be motivated by checking things off their bucket list or have dreamed about a trip for a long time and finally have the resources to go. While they are not interested in hard adventure, they are willing to mix in some light hiking and birdwatching to their culture-focused trip.

GENERAL PRODUCT RECOMMENDATIONS

Cultural Explorers are most likely motivated by checking items of their bucket list or fulfilling a dream to visit a destination. They primarily want to experience culture, but are willing to mix some soft adventure activities. They seek:

- Short excursions into a local community for low-risk interactions and time to relax after;
- Opportunities to learn from local guides and interact with local people;
- Traditional and comfortable lodging;
- Adventure activities: light hiking and birdwatching; and
- Cultural activities: cooking classes, craft classes and visits to historic sites.

GENERAL MARKETING RECOMMENDATIONS

- Market experiences that emphasize authentic engagement with culture in a friendly and welcoming way.
- Connect with them emotionally by addressing their desire to enrich their knowledge and learn through travel.
- Provide detailed information about travel experiences and cultures to allow them to actively research destinations prior to travel.
- Focus on traditional media such as *Travel & Leisure* (US) and *Get up & Go* (Australia), as they are not active social media users.



ANNEXES

ANNEX 1: CONTACT & STANDARDS

The information and data found in this report are current as of August 2019 and subject to change given market forces and external variables. The report is meant to serve as a research benchmark into the travel perceptions, attitudes and behaviors of identified and defined American and Australian cultural and adventure travel consumers, not an academic research report.

ATTA and subcontractors subscribe to the standards of the World Association of Opinion and Marketing Research Professionals (ESOMAR). ESOMAR sets minimum disclosure standards for studies that are released to the public or the media. The purpose is to maintain the integrity of market research by avoiding misleading interpretations.

July 2019

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ANNEX 2: METHODOLOGY

A total of 2,514 identified international travel consumers from USA (1,239) and Australia (1,275) were surveyed through an online primary survey between April 30 and May 17, 2019. An additional digital listening component evaluated 800 million social media posts.

ANALYSIS

Conducted standard quantitative analysis of **demographic and attitudinal** indicators

Used **digital listening** to evaluate 800 million posts on social media

Performed cluster analysis to identify **response patterns** as they relate to personality attributes

Analyzed two dimensions to learn how each **experience impacts** perceptions of a destination

OUTCOMES

► UNCOVERED FOUR SEGMENTS

The analysis revealed that many of the psychographic characteristics we measured were correlated in four main clusters and related to distinct travel preferences, personal priorities and values, which also aligned with future travel behavior. These clusters were translated into four traveler segments, with three target groups highlighted in more detail.

► DEVELOPED A COMPREHENSIVE TRAVEL PROFILE FOR EACH SEGMENT

- Demographics
- Personality profile
- Travel influences
- Key media
- Adventure and cultural activity preferences
- Travel planning and booking behaviors
- Spending
- Future travel destinations

► DEVELOPED SPECIFIC, PRACTICAL RECOMMENDATIONS FOR PRODUCT DEVELOPMENT AND MARKETING

ANNEX 3: ADVENTURE ACTIVITY CLASSIFICATION

Throughout the report, the categories of “hard adventure activities” and “soft adventure activities” are defined as follows.

HARD ADVENTURE ACTIVITIES	SOFT ADVENTURE ACTIVITIES
Bungee jumping	Backpacking/hiking
Caving	Birdwatching
Mountain/rock climbing	Camping
Heli-skiing	Canoeing
Kayaking/Sea/white water rafting	Horseback riding
Kite-surfing	Orienteering
Motorized sports (motorcycle, jetski, snowmobile, 4x4 etc)	Road cycling
Mountaineering	Sand boarding
Mountain biking	Safaris
Off-road buggy	Snorkeling
Paragliding	Skiing/snowboarding
Rafting	Stand-up paddleboarding
Scuba diving/Wreck diving	Surfing
Skydiving	Trekking
	Ziplining

ANNEX 4: CULTURE ACTIVITY CLASSIFICATION

Throughout the report, the categories of 'cultural activities' and 'cultural immersion' are defined as follows.

CULTURAL ACTIVITIES

Visiting an UNESCO World Heritage site

Participating in an architectural or cultural city tour

Visiting an architecturally significant building

Attending a cultural, folk, or religious festival

Participating in a cooking class

Learning about the traditions of the area and community

Visiting handicraft markets

Visiting well-known historic sights and buildings

Participating in an archaeology field trip

CULTURAL IMMERSION

Meeting with tribal or indigenous people

Visiting a tribal or indigenous village

Attending an indigenous or tribal performance

Staying in an indigenous or tribal village home

Taking local language classes

Taking a traditional medicine or plants tour

Participating in or attending a handcraft demonstration

IFC's work in the Pacific is guided by the Pacific Partnership. Australia, New Zealand and IFC are working together through the partnership to promote sustainable economic development, reduce poverty and stimulate private sector investment in the Pacific.

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