EXPERIENCE SEEKER PEN PORTRAITS

Source: MIDAS, VisitBritain/Kubi Kalloo, fieldwork March-April 2022

Markets: Australia, Canada, China, European Markets Combined, France, GCC, Germany, India, Italy, Netherlands & Saudi Arabia, Spain, UAE, USA.

VISIT BRITAIN

VisitEngland

AUSTRALIA EXPERIENCE SEEKERS

VISIT BRITAIN

VisitEngland

AUSTRALIA EXPERIENCE SEEKERS (26%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel (vs Australian total traveller population)

Britain 7.1 (vs 6.6)

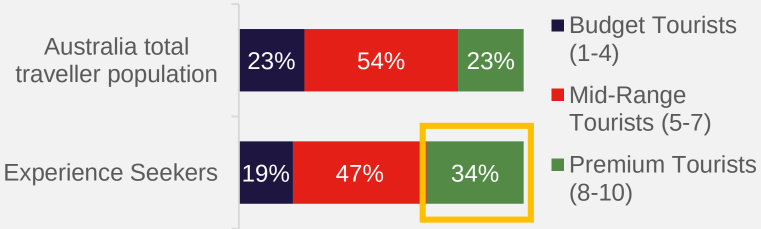
Anywhere internationally 6.2 (vs 5.4)

Top Holiday Types Preferred (share of preference)

Seeing famous sites, places	17.6%
Relaxing, resting, recharging	14.3%
Exploring or challenging yourself	14.0%
Visiting family and friends	12.7%

Experience Seekers over-index on potential spend but **PRIORITY Experience Seekers** are a smaller segment in Australia vs other markets (13%) representing **9%** of Australian tourists. It is a unique sub-segment which over-indexes on **males** and **younger tourists, particularly 18-34 yrs.**

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved **22% (+3%)**

Sustainability engaged **10% (+1%)**

Inclusion seekers **26% (+1%)**

GENDER

42%

58%

SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Recommendations by friends and family	38%
Recommendations by friends & family on social media	34%
Travel bloggers and influencers	34%
Travel websites and web pages	30%

53% of GB visitors went beyond England (vs **54%** Australia other tourists); and **78%** beyond London (vs **78%** Australia other tourists)

Half of them travel with their partner/ spouse, but 28% travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- Offers good value for money (90%)
- Is a welcoming place to visit (89%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (87%)
- I can roam around visiting many types of places (86%)
- Offers a lot of different experiences in one destination (86%)

KEY PERCEPTIONS OF BRITAIN:

- Is a place where I can explore history and heritage (61%)
- Is a mixture of old and new (60%)
- I can roam around visiting many types of places (57%)
- It's easy to get around once there (56%)
- Is inclusive and accessible for visitors like me (56%)

TOP ACTIVITIY PREFERENCES:

- Explore local food and beverage specialties (72%)
- Visit famous/iconic tourist attractions and places (72%)
- Experience coastal places and scenery (71%)
- Explore history and heritage (historical sites, architecture) (65%)
- Visit famous shops or shopping streets/centres (64%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

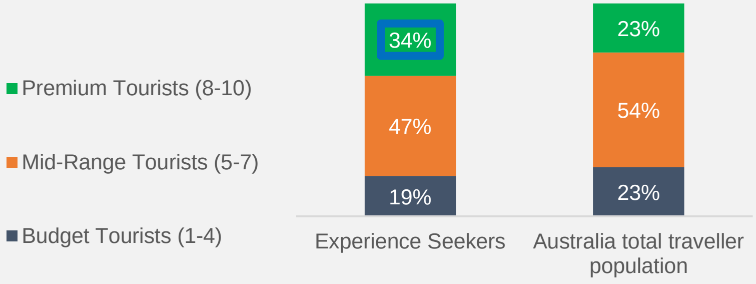
USA	ITALY	FRANCE	SPAIN	GERMANY
(46%)	(42%)	(40%)	(38%)	(34%)

Base size: Experience Seekers n=261; Total Australia n=1,036, global weighting applies

AUSTRALIA EXPERIENCE SEEKERS (26%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **22% (+4%)**

Sustainability engaged **20% (+5%)**

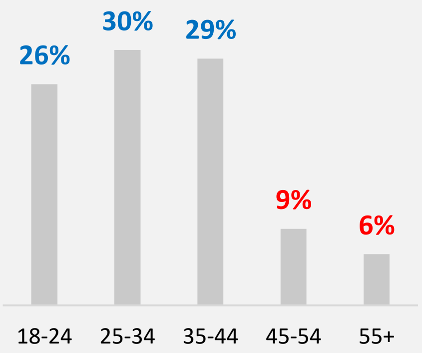
Inclusion seekers **24% (-1%)**

LIVING

42% (+8%) have kids, the split is between kids <12yrs and 12yrs+ is 61% and 39% respectively

AGE

*Modal age: 22 yrs
Median age: 32 yrs

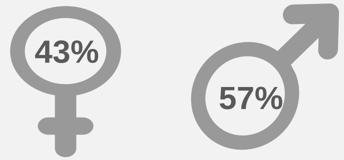


*Age with the highest frequency

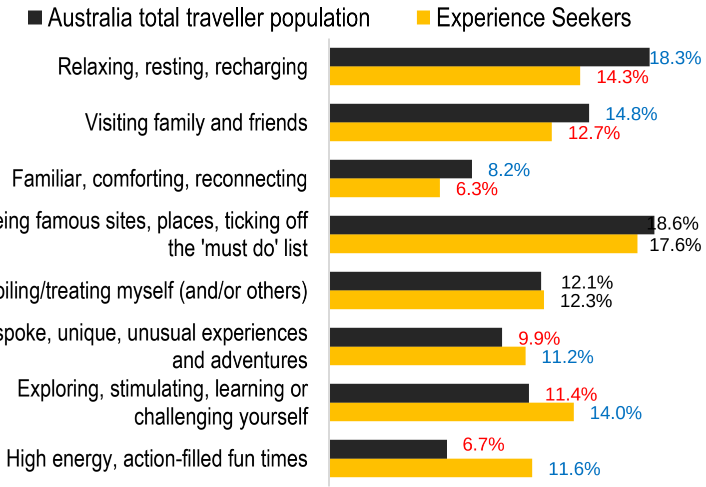
VISITORS (vs total)

Britain Visitors (P5yrs) **37%**
Considerers (P5yrs) **63%**

GENDER



TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

Photography, GIFS or videos on social media	Travel bloggers and influencers	Recommendations by friends and family on social media	Travel apps on mobile phones
8%	7%	7%	7%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences I want to share on social media (70%)
- If I don't visit soon, I'd miss out (62%)
- Has an interesting mix of cultures from around the world (82%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (72%)
- Has a thriving arts and contemporary culture scene (68%)

*KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers experiences I want to share on social media (52%)
- If I don't visit soon, I'd miss out (28%)
- It offers the opportunity to travel sustainably/responsibly (43%)
- Offers good value for money (35%)
- Is good to visit at any time of year (43%)

** ES audience in this market have lower perception scores of Britain when compared to the global average*

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (59%)
- Experience pubs, bars and clubs (60%)
- Visit theatre, opera, ballet or musicals (49%)
- Attend a learning course (41%)
- Participate in sport (34%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Australia total)

Disproportionately more likely to consider…

USA	SPAIN	GERMANY	ITALY	FRANCE
(+12%)	(+11%)	(+11%)	(+9%)	(+9%)

Base size: Experience Seekers n=261; Total Australia n=1,036, global weighting applies

AUSTRALIA: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

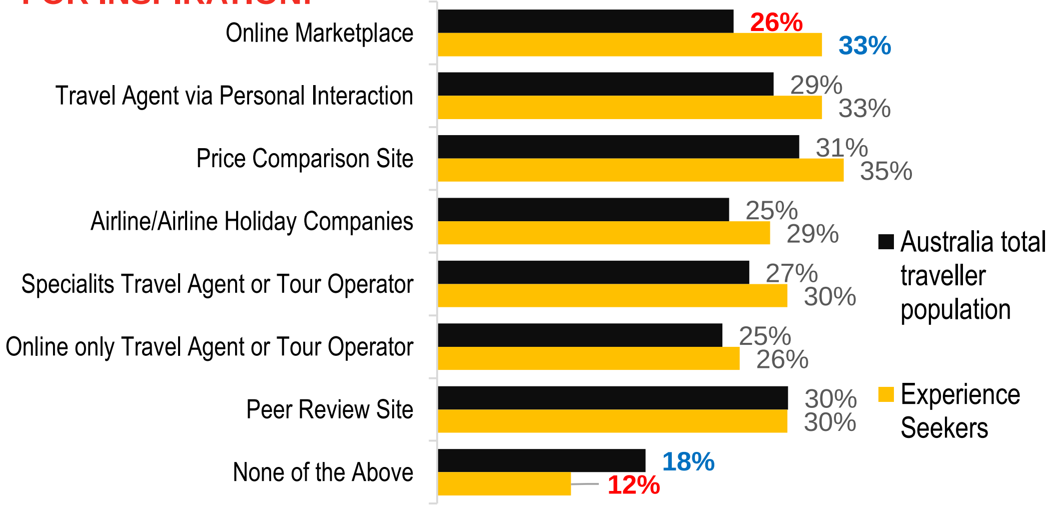
Experience Seekers show a higher usage of price comparison site in their planning & booking phase, alongside greater use of airline/airline holiday companies. They are also being driven by bargains/deals more than we see in non European markets

The majority are using multiple resources in the booking phase, with one in 3 (32%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 30% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via in-person travel agents.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 68% use personal interactions with travel agents throughout their journey, and half of these (52%) people use in-person travel agents in the booking phase.

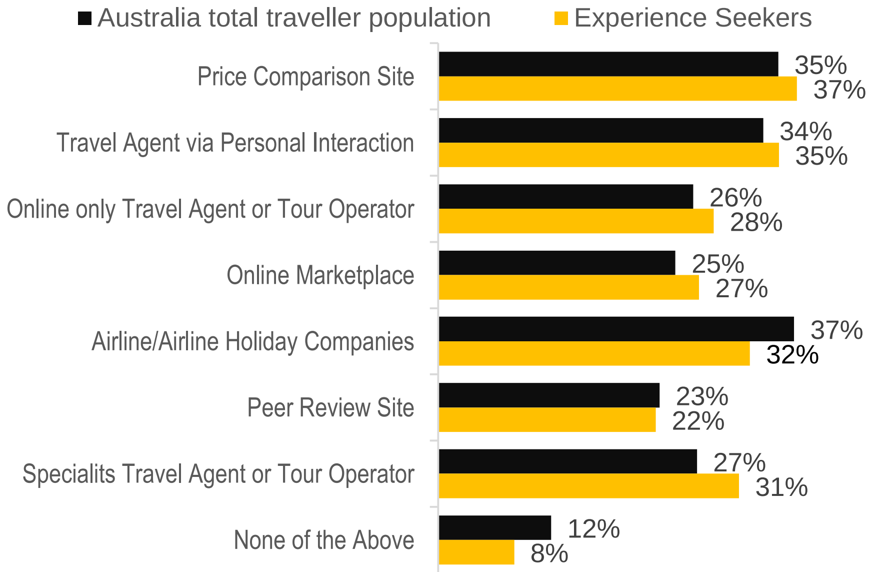
RESOURCES USED FOR INSPIRATION:



TOP INSPIRATIONS:

- Recommendations by friends/family(38%)
- Recommendations by friends/family on social media (34%)
- Travel bloggers and influencers (34%)
- Travel websites or web pages (30%)
- Photography on social media (25%)

RESOURCES FOR PLANNING:



TOOLS:

62% use more than one resource in the planning/ booking phase of the customer journey vs 57% for other tourists from Australia.

PACKAGE VERSUS SEPARATE BOOKINGS:

EXPERIENCE SEEKER BOOKING HABITS:

Booked:	Package	Accommodation	Travel
Online marketplace	6%*	14%	13%
Price comparison site	15%	21%	16%
Online travel agent	18%	14%	11%
Specialist travel agent	14%	9%	11%
In-person travel agents	27%	19%	22%
Directly with provider	20%	18%	26%

**Package option likely to be answered as respondents might have misunderstood this option*

I2 , Resources used; Experience Seekers n=267; total Australia n=1,036; global weighting applies

CANADA EXPERIENCE SEEKERS

VISIT BRITAIN
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CANADA EXPERIENCE SEEKERS (25%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel (vs Canada total traveller population)

Britain	7.2 (vs 6.6)
Anywhere internationally	6.0 (vs 5.2)

Top Holiday Types Preferred (share of preference)

Holiday type	Share
Seeing famous sites, places	15.2%
Relaxing, resting, recharging	13.8%
Exploring or challenging yourself	13.4%
Visiting family and friends	12.8%

Experience Seekers over-index on potential spend but **PRIORITY Experience Seekers** are a smaller segment in Canada vs other markets (13%) representing **9%** of Canadian tourists. It is a unique sub-segment which over-indexes on **younger tourists, particularly 18-34 yrs** who are interested in **sustainability and inclusion**

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget

	Budget Tourists (1-4)	Mid-Range Tourists (5-7)	Premium Tourists (8-10)
Canada total traveller population	26%	51%	23%
Experience Seekers	16%	49%	35%

Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved **20% (+3%)**

Sustainability engaged **38% (+20%)**

Inclusion seekers **36% (+12%)**

GENDER

46%

54%

SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Travel websites and web pages: **34%**	Recommendations by friends & family: **34%**
Recommendations by friends & family on social media: **31%**	Travel bloggers and influencers: **27%**

59% of GB visitors went beyond England (vs **52%** Canada other tourists); and **76%** beyond London (vs **70%** Canada other tourists)

55% travel with their partner/ spouse, but 27% travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- Offers good value for money (85%)
- Offers a lot of different experiences in one destination (85%)
- There is a good variety of food and drink to try (84%)
- It's easy to get around once there (84%)
- Is a welcoming place to visit (83%)

KEY PERCEPTIONS OF BRITAIN:

- Offers a lot of different experiences in one destination (57%)
- Is a place where I can explore history and heritage (55%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (54%)
- Is a mixture of old and new (53%)
- There are interesting local people to meet (53%)

TOP ACTIVITIY PREFERENCES:

- Experience coastal places and scenery (68%)
- Visit famous/iconic tourist attractions and places (67%)
- Experience city life (65%)
- Explore local food and beverage specialties (64%)
- Explore history and heritage (historical sites, architecture) (63%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

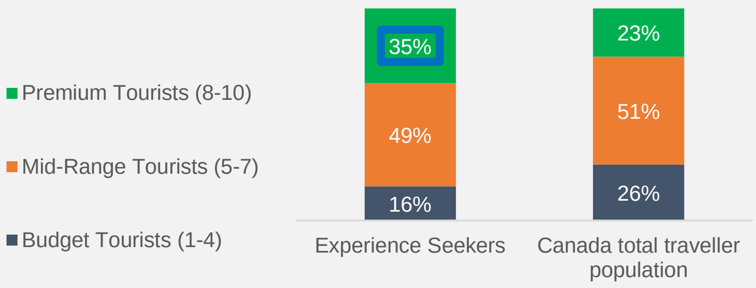
ITALY	AUSTRALIA	SPAIN	FRANCE	GERMANY
(49%)	(43%)	(41%)	(40%)	(39%)

Base size: Experience Seekers n=247; Total Canada n=1,002; global weighting applies

CANADA EXPERIENCE SEEKERS (25%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **19% (+2%)**

Sustainability engaged **21% (+3%)**

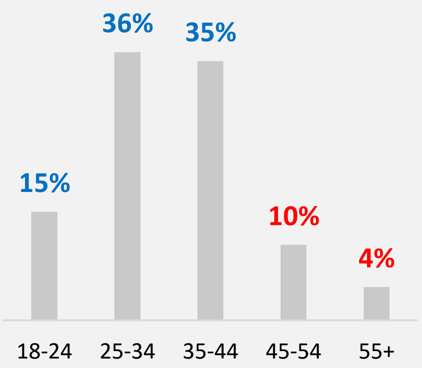
Inclusion seekers **22% (-3%)**

LIVING

43% (+8%) have kids, the split is between kids <12yrs and 12yrs+ is 50%.

AGE

***Modal age: 25 yrs**
Median age: 34 yrs

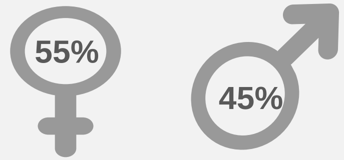


**Age with the highest frequency*

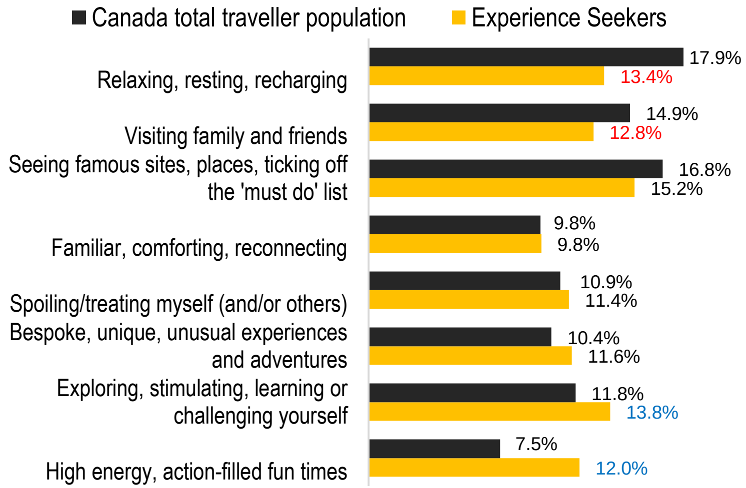
VISITORS (vs total)

Britain Visitors (P5yrs) **37%**
Considerers (P5yrs) **63%**

GENDER



TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

Recommendations from friends & family on social media	Online advertising	Music, concert, tours	Travel apps on mobile phones
8%	6%	6%	6%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences I want to share on social media (70%)
- If I don't visit soon, I'd miss out (68%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (74%)
- A place recommended by friends or family (74%)
- Has a thriving arts and contemporary culture scene (69%)

*KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers good value for money (40%)
- Is good to visit at any time of year (48%)
- Offers experiences I want to share on social media (48%)
- If I don't visit soon, I'd miss out (30%)
- It offers the opportunity to travel sustainably/ responsibly (44%)

** ES audience in this market have lower perception scores of Britain when compared to the global average*

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (60%)
- Participate in sport (40%)
- Participate in wellness activities (41%)
- Visit a brewery or distillery (51%)
- Volunteering (31%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Canada total)

Disproportionately more likely to consider…

GERMANY	ITALY	AUSTRALIA	PORTUGAL	SPAIN
(+13%)	(+12%)	(+11%)	(+10%)	(+10%)

Base size: Experience Seekers n=247; Total Canada n=1,002; global weighting applies

CANADA: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

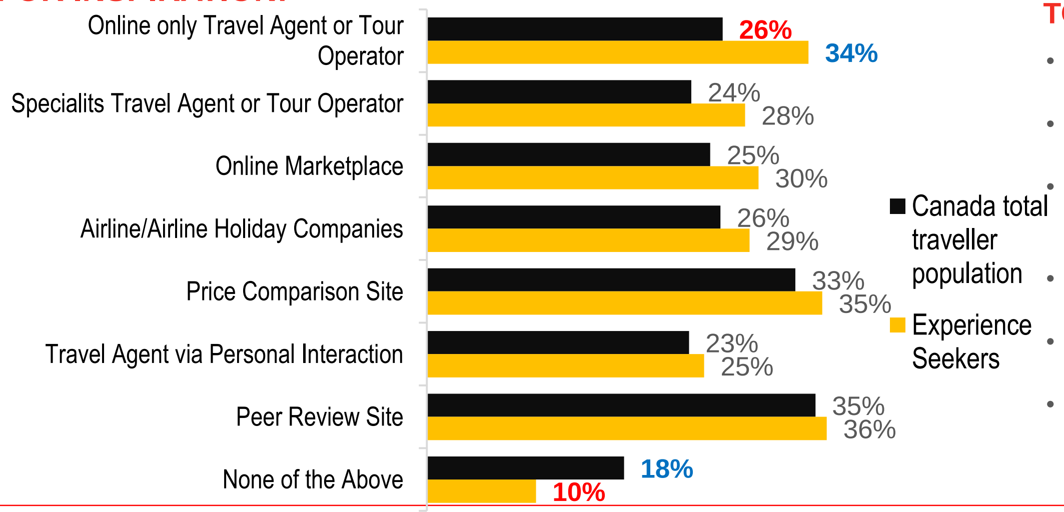
Experience Seekers show a higher usage of price comparison site in their planning & booking phase, alongside greater use of in-person travel agents. They are also being driven by bargains/deals more than we see in non European markets

The majority are using multiple resources in the booking phase, with more than one in 3 (36%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 31% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via price comparison sites.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 60% use personal interactions with travel agents throughout their journey, and almost half (47%) of these people use in-person travel agents in the booking phase.

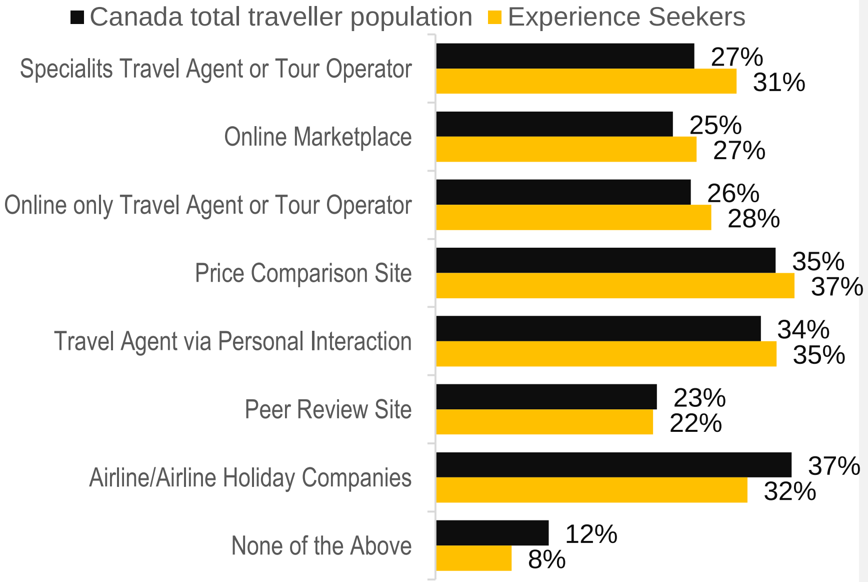
RESOURCES USED FOR INSPIRATION:



TOP INSPIRATIONS:

- Travel websites or web pages (34%)
- Recommendations by friends/family (34%)
- Recommendations by friends/family on social media (31%)
- Travel bloggers and influencers (27%)
- Online travel web site/agent (26%)
- Photography, GIFS or videos on websites (25%)

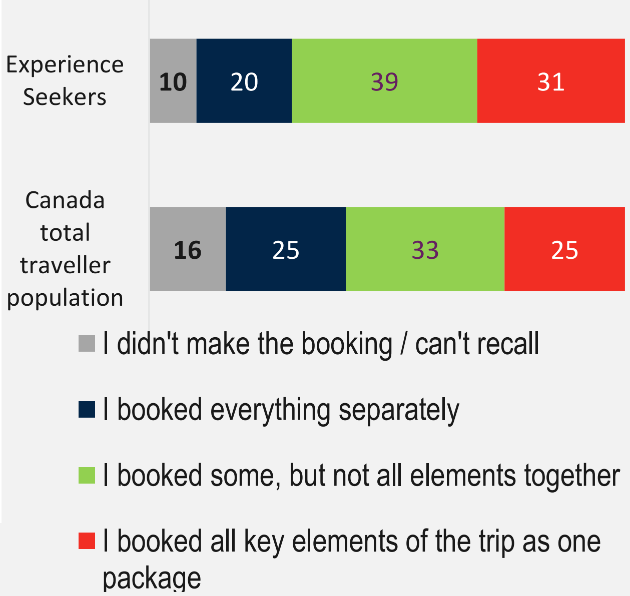
RESOURCES FOR PLANNING:



TOOLS:

60% use more than one resource in the planning/ booking phase of the customer journey vs 55% for other tourists from Canada.

PACKAGE VERSUS SEPARATE BOOKINGS:



EXPERIENCE SEEKER BOOKING HABITS:

Booked:	Package	Accommodation	Travel
Online marketplace	9%*	16%	12%
Price comparison site	21%	27%	27%
Online travel agent	18%	21%	18%
Specialist travel agent	16%	9%	9%
In-person travel agents	16%	13%	11%
Directly with provider	14%	10%	18%

**Package option likely to be answered as respondents might have misunderstood this option*

I2 , Resources used; Experience Seekers n=247; total Canada N=1,002, global weighting applies

CHINA EXPERIENCE SEEKERS

CHINA EXPERIENCE SEEKERS (34%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel (vs India total traveller population)

Britain **7.9** (vs **7.8**)

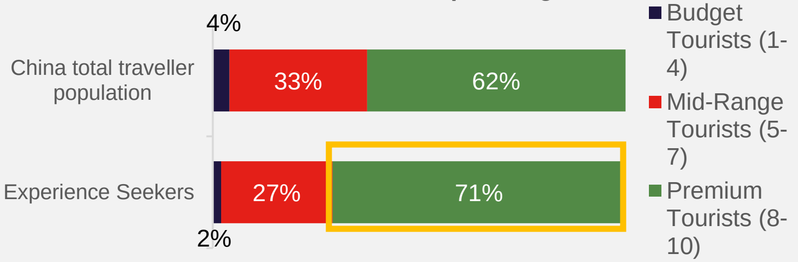
Anywhere internationally **7.5** (vs **7.3**)

Top Holiday Types Preferred (share of preference)

Relaxing, resting, recharging	14.5%
High energy, action-filled fun times	14.0%
Seeing famous sites, places	13.5%
Spoiling/treating myself (and/or others)	13.0%

Experience Seekers over-index on potential spend but **PRIORITY Experience Seekers** are a bigger segment in China vs other markets (13%) representing **24%** of China tourists. It is a unique sub-segment which over-indexes on **females, younger tourists, particularly 18-34 yrs** who are interested in **wellbeing, sustainability, and inclusion.**

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



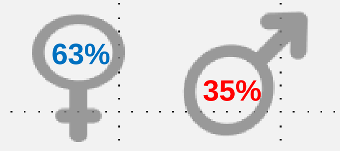
Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved **15% (+7%)**

Sustainability engaged **29% (+7%)**

Inclusion seekers **29% (+7%)**

GENDER



SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Travel bloggers and influencers **47%**	National Tourist Board **44%**
Recommendations by friends & family on social media **43%**	Photography, GIFS or videos on websites **41%**

79% of GB visitors went beyond England (vs **71%** China other tourists); and **59%** beyond London (vs **57%** China other tourists)

70% travel with their partner/ spouse, but **28%** travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- There are vibrant towns and cities to explore (93%)
- Has an interesting mix of cultures from around the world (92%)
- It has surprising and unexpected experiences (91%)
- Is inclusive and accessible for visitors like me (91%)
- Is good for relaxing, resting, recharging (91%)

KEY PERCEPTIONS OF BRITAIN:

- A good place for treating myself, e.g. premium brands, gourmet food, etc. (45%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (42%)
- Is good for relaxing, resting, recharging (41%)
- Is a mixture of old and new (41%)
- Is a place where I can explore history and heritage (40%)

TOP ACTIVITIY PREFERENCES:

- Explore local food and beverage specialties (79%)
- Experience coastal places and scenery (77%)
- Enjoy fine dining experiences (76%)
- Self-driving tours (75%)
- Visit famous/iconic tourist attractions and places (75%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

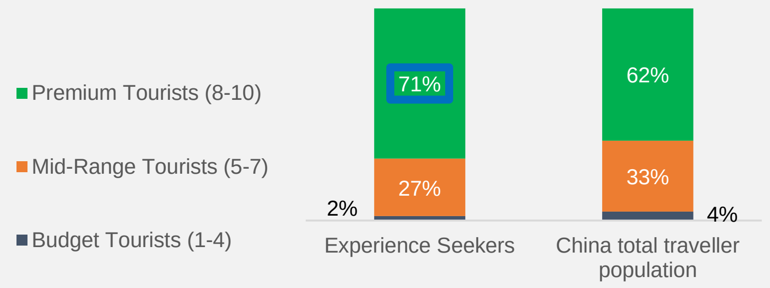
FRANCE (65%) | **ITALY (62%)** | **NEW ZEALAND (60%)** | **SWITZERLAND (59%)** | **AUSTRALIA (58%)**

Base size: Experience Seekers n=339; Total China n=1,003; global weighting applies

CHINA EXPERIENCE SEEKERS (34%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **11% (+3%)**

Sustainability engaged **23% (+2%)**

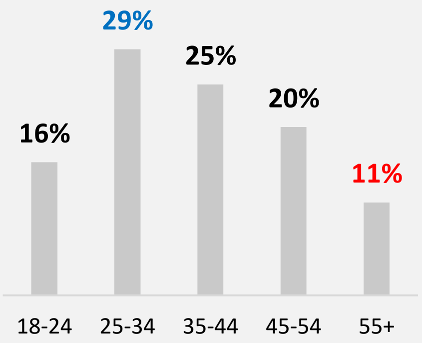
Inclusion seekers **24% (+2%)**

LIVING

48% (+1%) have kids, the split is between kids <12yrs and 12yrs+ is **60%** and **40%** respectively.

AGE

***Modal age: 35 yrs**
Median age: 35 yrs



**Age with the highest frequency*

VISITORS (vs total)

Britain Visitors (P5yrs) **38% (+4%)**

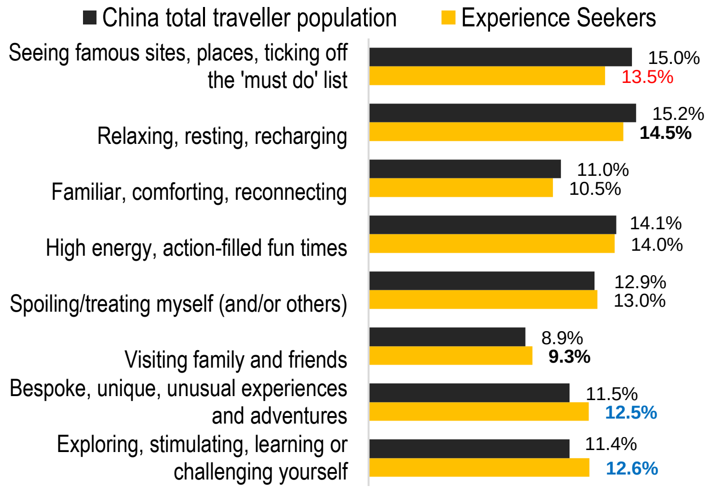
Considerers (P5yrs) **62% (-4%)**

GENDER

59%

40%

TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

Music, concerts, tours	National Tourist Board	Kids' TV, movies or from friends at school	Travel websites or web pages
6%	4%	3%	3%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- There are interesting local people to meet (89%)
- There are vibrant towns and cities to explore (93%)
- If I don't visit soon, I'd miss out (82%)
- Is inclusive and accessible for visitors like me (91%)
- It has surprising and unexpected experiences (91%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- A good place for treating myself (45%)
- If I don't visit soon, I'd miss out (33%)
- There are interesting local people to meet (37%)
- Is good to visit at any time of year (40%)
- Is good for relaxing, resting, recharging (41%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Self-driving tours (75%)
- Participate in action and adventure experiences (75%)
- Enjoy fine dining experiences (76%)
- Attend a learning course (cooking, language etc.) (64%)
- Experience pubs, bars and clubs (73%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs China total)

Disproportionately more likely to consider…

SPAIN	FRANCE	USA	ITALY	NEW ZEALAND
(+5%)	(+5%)	(+4%)	(+4%)	(+3%)

Base size: Experience Seekers n=339; Total n=1,003; global weighting applies

CHINA: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

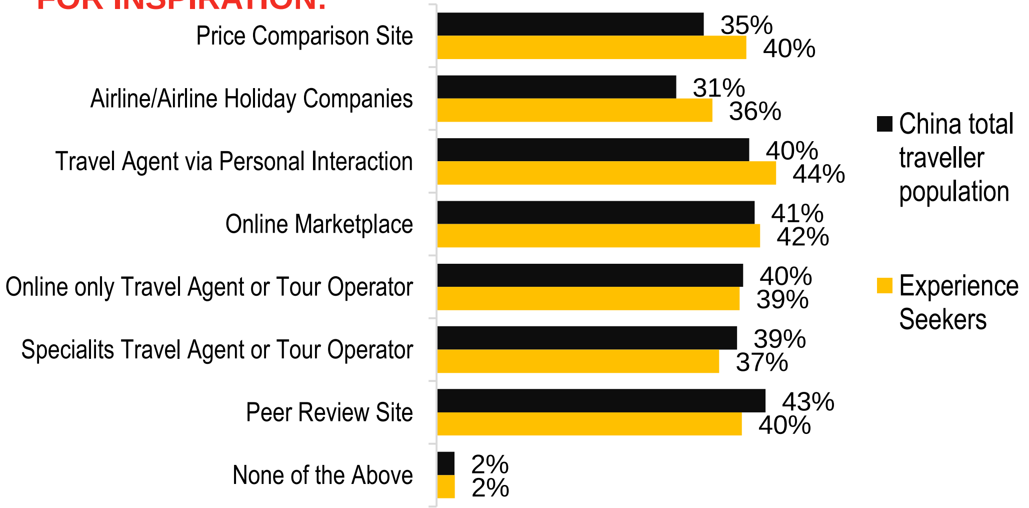
Experience Seekers show a higher usage of specialist travel agent in their planning & booking phase, alongside greater use of airline/airline holiday companies. They are also being driven by bargains/deals more than we see in non European markets

The majority are using multiple resources in the booking phase, with one in 3 (29%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 47% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via specialist travel agent.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 88% use personal interactions with travel agents throughout their journey, and 34% of these people use in-person travel agents in the booking phase.

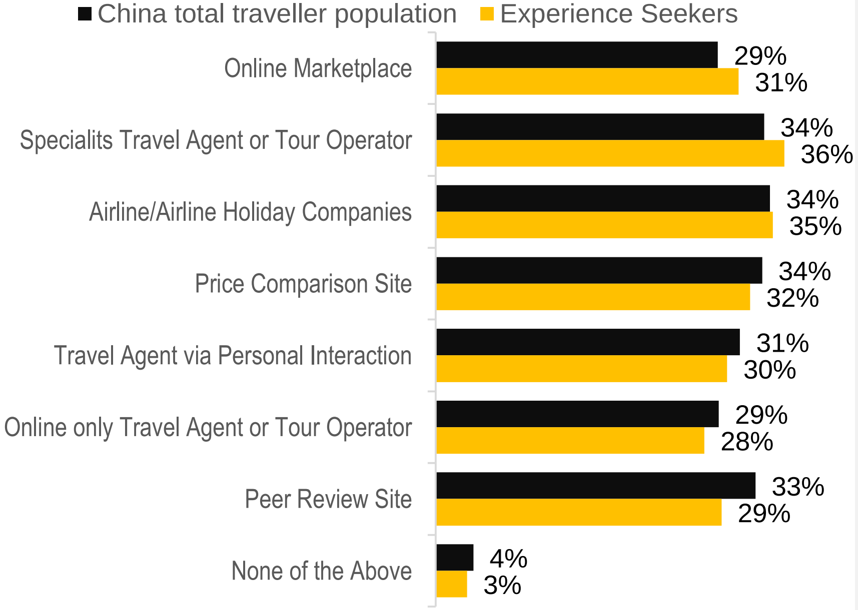
RESOURCES USED FOR INSPIRATION:



TOP INSPIRATIONS:

- Travel bloggers and influencers (47%)
- National Tourist Board (44%)
- Recommendations friends/family on social media (43%)
- Photography, GIFS or videos on websites 41%)
- Travel websites or web pages (40%)

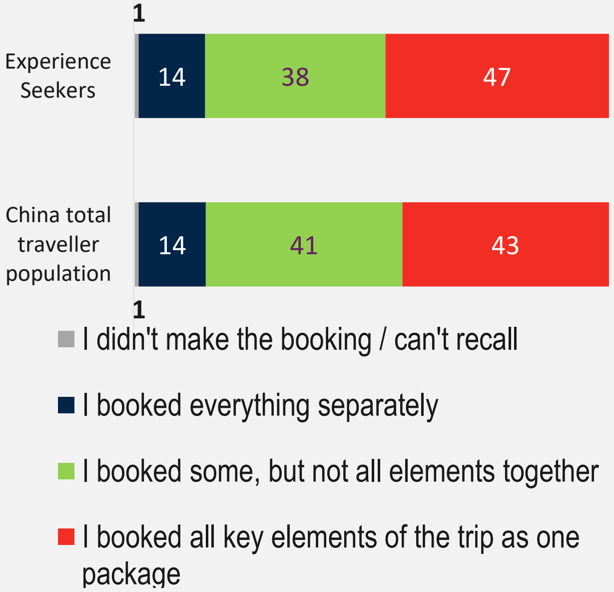
RESOURCES FOR PLANNING:



TOOLS:

69% use more than one resource in the planning/ booking phase of the customer journey vs 67% for other tourists from China.

PACKAGE VERSUS SEPARATE BOOKINGS:



EXPERIENCE SEEKER BOOKING HABITS:

Booked:	Package	Accommodation	Travel
Online marketplace	13%*	16%	12%
Price comparison site	19%	19%	19%
Online travel agent	15%	18%	20%
Specialist travel agent	25%	22%	23%
In-person travel agents	18%	16%	14%
Directly with provider	10%	10%	12%

**Package option likely to be answered as respondents might have misunderstood this option*

I2 , Resources used; Experience Seekers n=339; total N=1,003; global weighting applies

EUROPEAN MARKET EXPERIENCE SEEKERS

VISIT BRITAIN VisitEngland

European markets: Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Norway, Spain, Sweden and Switzerland

EUROPEAN MARKET EXPERIENCE SEEKERS (23%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

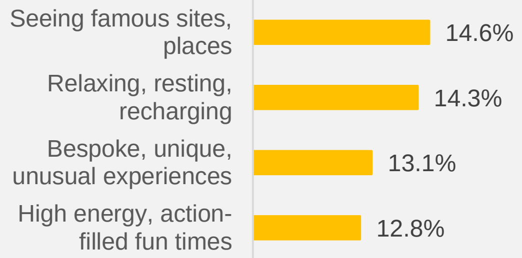
Propensity to travel

(vs India total traveller population)

Britain 6.9 (vs 6.4)

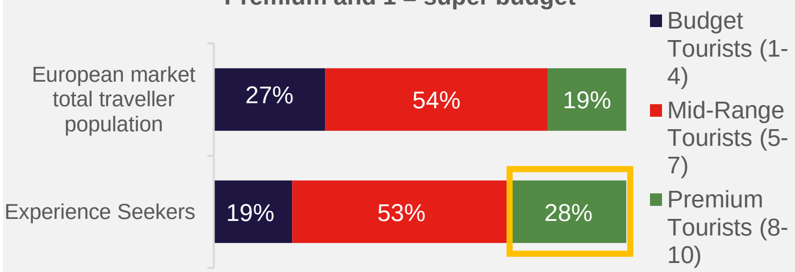
Anywhere internationally 6.2 (vs 5.7)

Top Holiday Types Preferred (share of preference)



Experience Seekers over-index on potential spend but **PRIORITY Experience Seekers** are a smaller segment in Europe vs other markets (13%) representing **6%** of European market tourists. It is a unique sub-segment which over-indexes on **males, younger tourists, particularly 18-34 yrs** who are interested in **sustainability, and inclusion.**

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved **13% (+2%)**

Sustainability engaged **24% (+11%)**

Inclusion seekers **24% (+8%)**

GENDER

48%

52%

SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Recommendations by friends and family **37%**	Bargain deals on airfares or tours **30%**
Recommendations by friends & family on social media **30%**	Travel bloggers and influencers **28%**

32% of GB visitors went beyond England (vs **31%** European market other tourists); and **51%** beyond London (vs **49%** European market other tourists)

54% travel with their partner/ spouse, but 23% travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- Offers good value for money (81%)
- Is a welcoming place to visit (79%)
- Offers a lot of different experiences in one destination (78%)
- There is beautiful coast and countryside to explore (78%)
- I can roam around visiting many types of places (78%)

KEY PERCEPTIONS OF BRITAIN:

- There are vibrant towns and cities to explore (53%)
- I can roam around visiting many types of places (50%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (49%)
- It's easy to get around once there (49%)
- Offers a lot of different experiences in one destination (48%)

TOP ACTIVITIY PREFERENCES:

- Explore local food and beverage specialties (65%)
- Experience coastal places and scenery (60%)
- Visit famous/iconic tourist attractions and places (56%)
- Explore history and heritage (historical sites, architecture) (55%)
- Experience city life (55%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

SPAIN	ITALY	PORTUGAL	CROATIA	FRANCE
(50%)	(49%)	(48%)	(46%)	(45%)

Base size: European market Experience Seekers n=1,966; Total n=8,457; global weighting applies

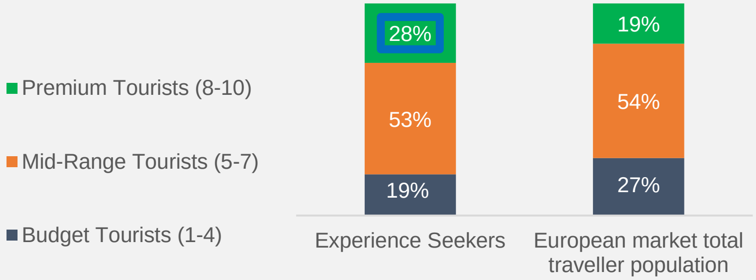
European markets: France, Germany, Spain, Italy, Denmark, Sweden, Norway, Netherlands, Austria, Switzerland, Belgium

VISIT BRITAIN VisitEngland

EUROPEAN MARKET EXPERIENCE SEEKERS (23%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **12% (+3%)**

Sustainability engaged **16% (+3%)**

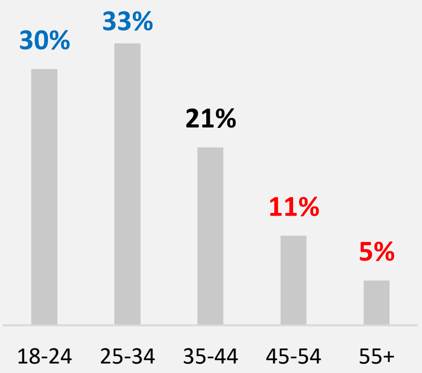
Inclusion seekers **17% (+1%)**

LIVING

31% (-2%) have kids, the split is between kids <12yrs and 12yrs+ is **57%** and **43%** respectively.

AGE

*Modal age: 22 yrs
Median age: 31 yrs



*Age with the highest frequency

VISITORS (vs total)

Britain Visitors (P5yrs) **39% (+3%)**

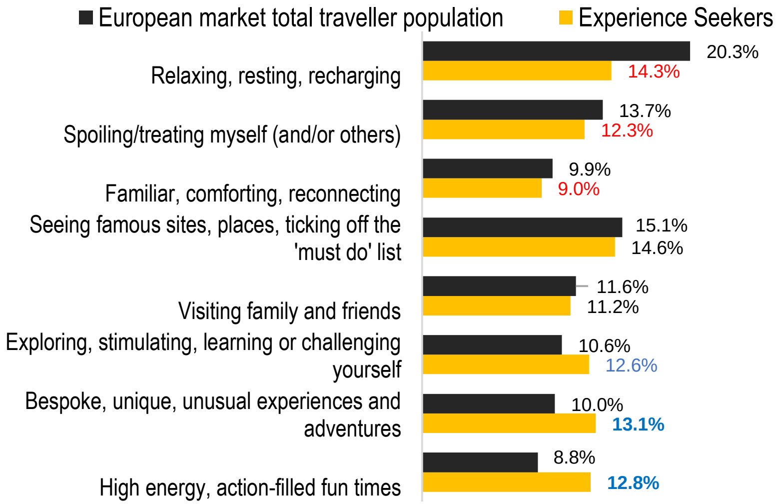
Considerers (P5yrs) **61% (-3%)**

GENDER

59%

40%

TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

Travel bloggers and influencers	Recommendations by friends & family on social media	Photography, GIFS or videos on social media	Music, concerts, tours
8%	7%	5%	5%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences I want to share on social media (54%)
- If I don't visit soon, I'd miss out (54%)
- It has surprising and unexpected experiences (77%)
- It offers the opportunity to travel sustainably/responsibly (64%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (56%)

*KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers experiences I want to share on social media (42%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (35%)
- If I don't visit soon, I'd miss out (24%)
- It offers the opportunity to travel sustainably/responsibly (33%)
- A place recommended by friends or family (35%)

** ES audience in this market have lower perception scores of Britain when compared to the global average*

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (52%)
- Participate in sport (29%)
- Attend a sporting event (32%)
- Volunteering (25%)
- Attend a live music festival/event (43%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs European markets total)

Disproportionately more likely to consider…

USA	FRANCE	ITALY	NETHERLANDS	SWITZERLAND
(+13%)	(+8%)	(+8%)	(+8%)	(+8%)

Base size: European market Experience Seekers n=1,966; Total n=8,457; global weighting applies

European markets: France, Germany, Spain, Italy, Denmark, Sweden, Norway, Netherlands, Austria, Switzerland, Belgium

EUROPEAN MARKET: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

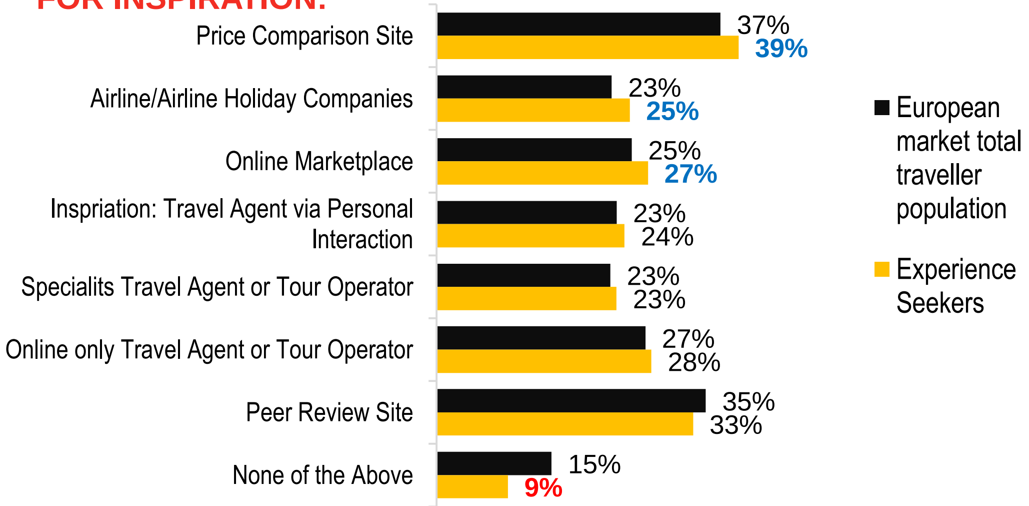
Experience Seekers show a higher usage of price comparison site in their planning & booking phase, alongside greater use of peer review site. They are also being driven by bargains/deals more than we see in non European markets

The majority are using multiple resources in the booking phase, with one in 5 (22%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 27% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via in-person travel agent.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 46% use personal interactions with travel agents throughout their journey, and almost than half of these (47%) use in-person travel agents in the booking phase.

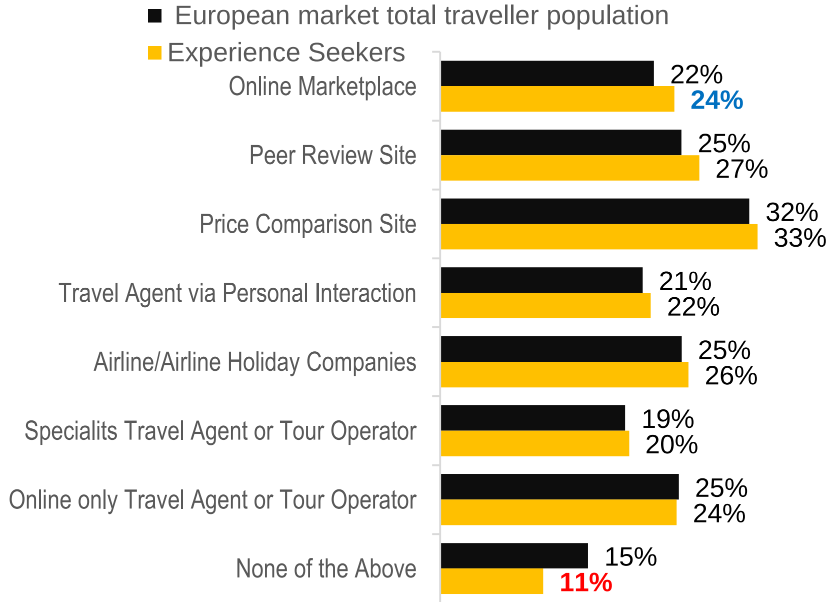
RESOURCES USED FOR INSPIRATION:



TOP INSPIRATIONS:

- Recommendations by friends and family (37%)
- Bargain deals on airfares or tours (30%)
- Recommendations friends/family on social media (30%)
- Travel bloggers and influencers (28%)
- Travel websites or web pages (28%)

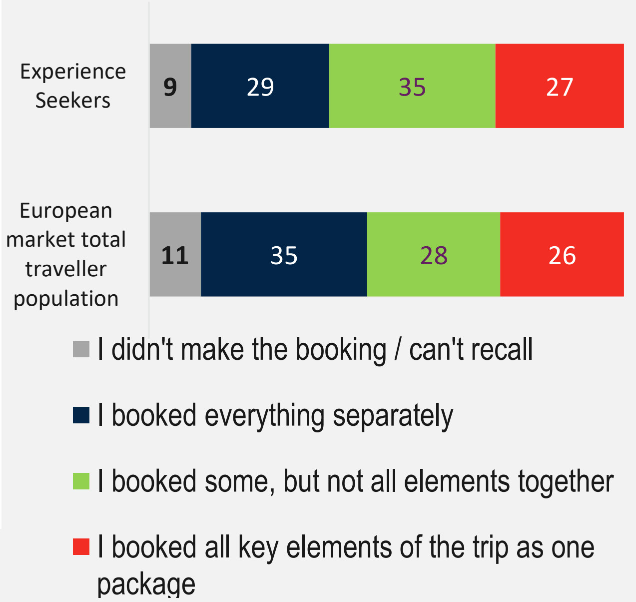
RESOURCES FOR PLANNING:



TOOLS:

48% use more than one resource in the planning/ booking phase of the customer journey vs 45% for other tourists from European market.

PACKAGE VERSUS SEPARATE BOOKINGS:



EXPERIENCE SEEKER BOOKING HABITS:

Booked:	Package	Accommodation	Travel
Online marketplace	16%*	21%	16%
Price comparison site	21%	25%	28%
Online travel agent	19%	14%	14%
Specialist travel agent	13%	8%	9%
In-person travel agents	14%	10%	9%
Directly with provider	15%	16%	18%

**Package option likely to be answered as respondents might have misunderstood this option*

Base size: European market Experience Seekers n=1,966; Total n=8,457; global weighting applies

European markets: France, Germany, Spain, Italy, Denmark, Sweden, Norway, Netherlands, Austria, Switzerland, Belgium

FRANCE EXPERIENCE SEEKERS

VISIT BRITAIN

VisitEngland

FRANCE EXPERIENCE SEEKERS (26%)

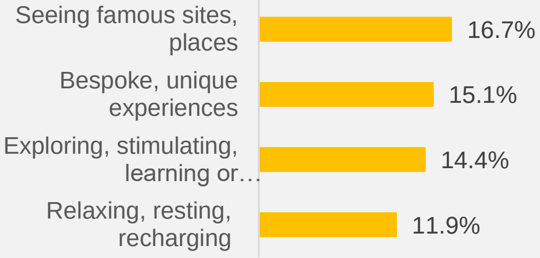
Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel (vs France total traveller population)

Britain 6.9 (vs 6.8)

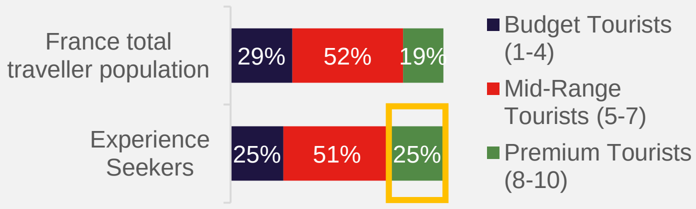
Anywhere internationally **6.4** (vs **6.0**)

Top Holiday Types Preferred (share of preference)



Experience Seekers over-index on potential spend but **PRIORITY Experience Seekers** are a smaller segment in France vs other markets representing **6%** of French tourists. It is a unique sub-segment which over-indexes on **males** and **younger tourists, particularly 18-34 yrs** who are interested in **sustainability and inclusion**

Likely spend on 10-point scale, where 10 = super premium and 1 = super budget



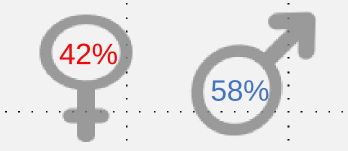
Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved **14% (+2%)**

Sustainability engaged **32% (+17%)**

Inclusion seekers **35% (+15%)**

GENDER



SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

- Recommendations or connections with friends & family: **40%**
- Bargain deals on airfares or tours: **35%**
- Travel websites or webpages: **31%**
- Photography, Gifs, and videos on websites: **30%**

36% of GB visitors went beyond England (vs **31%** France other tourists); and **59%** beyond London (vs **50%** France other tourists)

2 out of 3 travel with their partner/ spouse, but 1 out of 4 travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- Offers good value for money (85%)
- There is beautiful coast and countryside to explore (84%)
- Is a welcoming place to visit (83%)
- It's easy to get around once there (83%)
- It has surprising and unexpected experiences (82%)

KEY PERCEPTIONS OF BRITAIN:

- It's easy to get around once there (55%)
- I can roam around visiting many types of places (54%)
- There are vibrant towns and cities to explore (52%)
- Is good to visit at any time of year (51%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (51%)

TOP ACTIVITIY PREFERENCES:

- Explore local food and beverage specialties (75%)
- Experience coastal places and scenery (65%)
- Participate in action and adventure experiences (62%)
- Explore history and heritage (historical sites, architecture) (62%)
- Visit parks and gardens (61%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

Spain (53%) | **Italy (51%)** | **Portugal (48%)** | **USA (43%)** | **Belgium (33%)**

Base size: Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies

FRANCE EXPERIENCE SEEKERS (26%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget

	Experience Seekers	France total traveller population
Premium Tourists (8-10)	25%	19%
Mid-Range Tourists (5-7)	50%	52%
Budget Tourists (1-4)	25%	29%

TREND ENDORSERS (vs total)

Wellbeing involved **14% (+1%)**

Sustainability engaged **18% (+3%)**

Inclusion seekers **21% (+1%)**

LIVING

40% (-3%) have kids, the split is between kids <12 and 12yrs+ is 60% and 40% respectively

AGE

*Modal age: 21 yrs
Median age: 32 yrs

18-24	25-34	35-44	45-54	55+
25%	35%	23%	12%	5%

*Age with the highest frequency

VISITORS (vs total)

Britain Visitors (P5yrs) **37% (+3%)**

Considerers (P5yrs) **63% (-3%)**

GENDER

Female 52%
Male 48%

TYPES OF HOLIDAYS:

	France total traveller population	Experiment Seekers
Seeing famous sites, places, ticking off the 'must do' list	17.3	16.7
Bespoke, unique, unusual experiences and adventures	9.6	15.1
Exploring, stimulating, learning or challenging yourself	8.4	14.4
Relaxing, resting, recharging	19.0	11.9
Visiting family and friends	13.5	11.3
Familiar, comforting, reconnecting	12.4	10.8
Spoiling/treating myself (and/or others)	13.2	10.0
High energy, action-filled fun times	6.6	9.8

SOURCES OF INSPIRATION (BIGGEST SKEWS):

Travel bloggers	recommendations from friends & family	Photography, GIFs, Videos on social media	Photography, GIFs, Videos on websites
7%	7%	6%	5%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences I want to share on social media (51%)
- It has surprising and unexpected experiences (82%)
- Is a mixture of old and new (72%)
- A place recommended by friends or family (65%)
- It has experiences I can't have anywhere else (82%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers experiences I want to share on social media (42%)
- Offers good value for money (27%)
- A place recommended by friends or family (36%)
- Is a welcoming place to visit (47%)
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (36%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (62%)
- Participate in sport (30%)
- Self-driving tours (37%)
- Attend a sporting event (38%)
- Enjoy outdoor walks, hiking or cycling (58%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs France total)

Disproportionately more likely to consider…

USA	BELGIUM	PORTUGAL	NETHERLANDS	GERMANY
(+10%)	(+8%)	(+8%)	(+7%)	(+6%)

Base size: Experience Seekers n=265; Total n=1,003

FRANCE: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

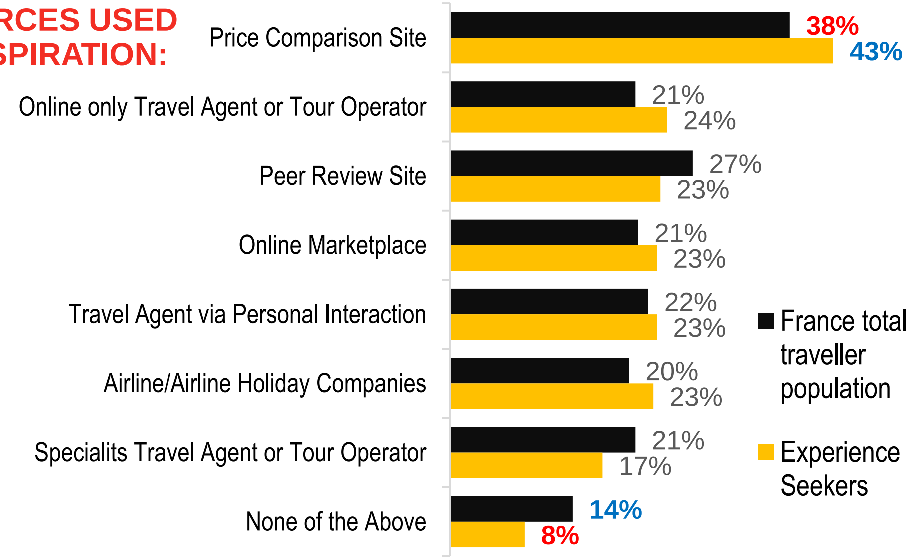
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators. They are also being driven by bargains/deals more than we see in non European markets

The majority are using multiple resources in the booking phase, with one in 3 (18%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 28% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Online Marketplaces.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 40% use personal interactions with travel agents throughout their journey, and more than half of these (24%) use them in the booking phase.

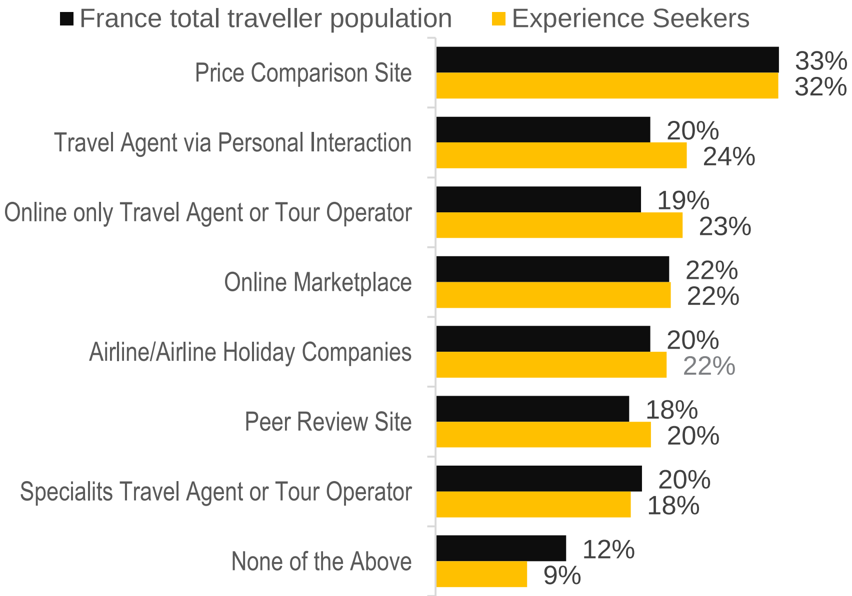
RESOURCES USED FOR INSPIRATION:



TOP INSPIRATIONS:

- Recommendations friends/family(40%)
- Bargains/deals (35%)
- Travel websites (31%)
- Photography on websites (30%)
- Social media – advice recommendations (29%)
- Photography on social media (29%)

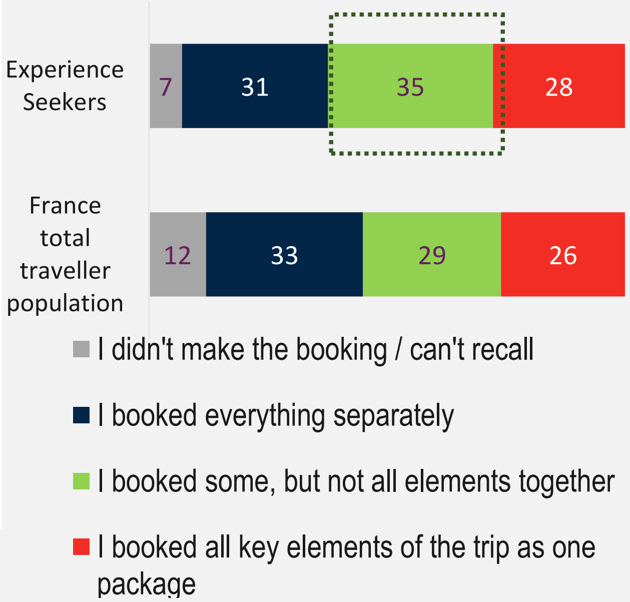
RESOURCES FOR PLANNING:



TOOLS:

41% use more than one resource in the planning/ booking phase of the customer journey vs 38% for other tourists from France.

PACKAGE VERSUS SEPARATE BOOKINGS:



Booked:	Package		Travel		Accommodation	
Via:	ES	Non	ES	Non	ES	Non
*Online mktplace	19%	11%				
Price comparison site			31%	28%	25%	19%
Online only travel agent			15%	11%	18%	12%

**Data show only stakeholders which are used more by Experience Seekers compared to other segments in the market.*
***Package option likely to be answered as respondents might have misunderstood this option*

I2 , Resources used; Experience Seekers n=6,677; total N=22,840

GCC EXPERIENCE SEEKERS

Combined data: Saudi Arabia, United Arab Emirates

GCC EXPERIENCE SEEKERS (51%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel
(vs GCC total traveller population)

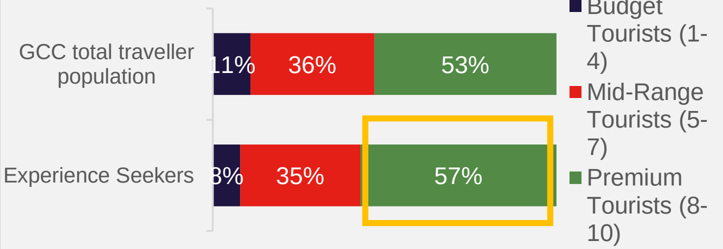
Britain	8.1 (vs 8.0)
Anywhere internationally	7.4 (vs 7.3)

Top Holiday Types Preferred (share of preference)

Holiday type	Share
Seeing famous sites, places	13.3%
High energy, action-filled times	13.3%
Spoiling/treating myself (and/or others)	13.2%
Visiting friends and family	13.0%

Experience Seekers over-index on potential spend. If we shine the light on the **PRIORITY Experience Seekers** (highlighted), they represent **29%** of GCC tourists, and are a unique sub-segment which over-index on **25-34 yrs** and interested in **new tourism trends particularly inclusion and sustainability**.

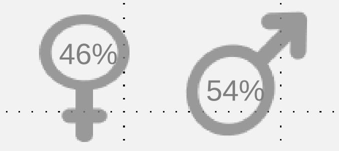
Likely spend on 10-point scale, where 10 = super premium and 1 = super budget



PRIORITY Experience Seekers are trend endorsers (vs total):

- Wellbeing involved **29% (+6%)**
- Sustainability engaged **48% (+12%)**
- Inclusion seekers **52% (+13%)**

GENDER



SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Recommendations by friends & family on social media **54%**	Travel bloggers, influencers **49%**
Recommendations or connections with friends & family **47%**	National Tourist Board Websites **41%**

TOP DRIVERS OF DESTINATION CHOICE:

- Offers good value for money (93%)
- Is a welcoming place to visit (93%)
- Offers lots of different experiences in one destination (92%)
- I can roam around visiting many types of places (92%)

KEY PERCEPTIONS OF BRITAIN:

- Is a place where I can explore history and heritage (56%)
- There are vibrant towns and cities to explore (54%)
- Has an interesting mix of cultures from around the world (54%)
- Is a mixture of old and new (54%)
- There is beautiful coast and countryside to explore (54%)
- A good place for treating myself (54%)

TOP ACTIVITIY PREFERENCES:

- Visit famous shops or shopping streets/centres (81%)
- Explore local food and beverage specialties (80%)
- Visit famous/iconic tourist attractions and places (80%)
- Experience coastal places and scenery (79%)
- Participate in action and adventure experiences (79%)

57% of GB visitors went beyond England (vs **59%** GCC other tourists); and **88%** of England visitors beyond London (vs **88%** GCC other tourists)

2 out of 3 travel with their partner/ spouse, but **over 4 in 10** travel with kids (multiple response data)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

Italy	Switzerland	USA	Spain	France
(63%)	(63%)	(61%)	(61%)	(59%)

Base size: Experience Seekers n=665; GCC total n=1309; global weighting applies

GCC EXPERIENCE SEEKERS (51%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget

	Experience Seekers	GCC total traveller population
Premium Tourists (8-10)	57%	53%
Mid-Range Tourists (5-7)	35%	36%
Budget Tourists (1-4)	8%	11%

TREND ENDORSERS (vs total)

Wellbeing involved **24% (+2%)**

Sustainability engaged **41% (+5%)**

Inclusion seekers **45% (+6%)**

LIVING

53% (+1%) have kids, and the split is between kids <12 and 12yrs+ is 65% and 35% respectively

AGE

*Modal age: 22 yrs
Median age: 32 yrs

18-24	25-34	35-44	45-54	55+
23%	39%	31%	7%	1%

*Age with the highest frequency

VISITORS (vs total)

Britain Visitors (P5yrs) **44% (+1%)**

Considerers (P5yrs) **56% (-1%)**

GENDER

Female	Male
45%	54%

TYPES OF HOLIDAYS:

	GCC total traveller population	Experience Seekers
Seeing famous sites, places, ticking off the 'must do' list	13.6	13.3
High energy, action-filled fun times	12.2	13.3
Spoiling/treating myself (and/or others)	12.9	13.2
Visiting family and friends	13.5	13.0
Relaxing, resting, recharging	14.0	12.6
Bespoke, unique, unusual experiences and adventures	11.7	12.5
Exploring, stimulating, learning or challenging yourself	11.7	11.8
Familiar, comforting, reconnecting	10.3	10.3

SOURCES OF INSPIRATION (BIGGEST SKEWS):

Recommendations or connections with friends & family	National tourist boards
+5	+5

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- There are interesting local people to meet (86%)
- A good place for treating myself e.g. Priority brands, gourmet food (88%)
- It has experiences I can't have anywhere else (91%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- If I don't visit soon I'd miss out (44%)
- There is beautiful coast and countryside to explore (54%)
- Offers a lot of different experiences in one destination (53%)
- Is a welcoming place to visit (53%)
- Offers experiences I want to share on social media (53%)
- There is a good variety of food & drink to try (51%)
- A place recommended by friends or family (51%)
- Is good to visit at any time of year (46%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (79%)
- Experience city life (77%)
- Visit famous shops or shopping streets/centres (81%)
- Visit literary, music, film and TV locations (65%)
- Attend a sporting event (65%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs GCC total)

Disproportionately more likely to consider…

USA	SPAIN
(+5%)	(+4%)

Base size: Experience Seekers n=665; total N=1309

GCC: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

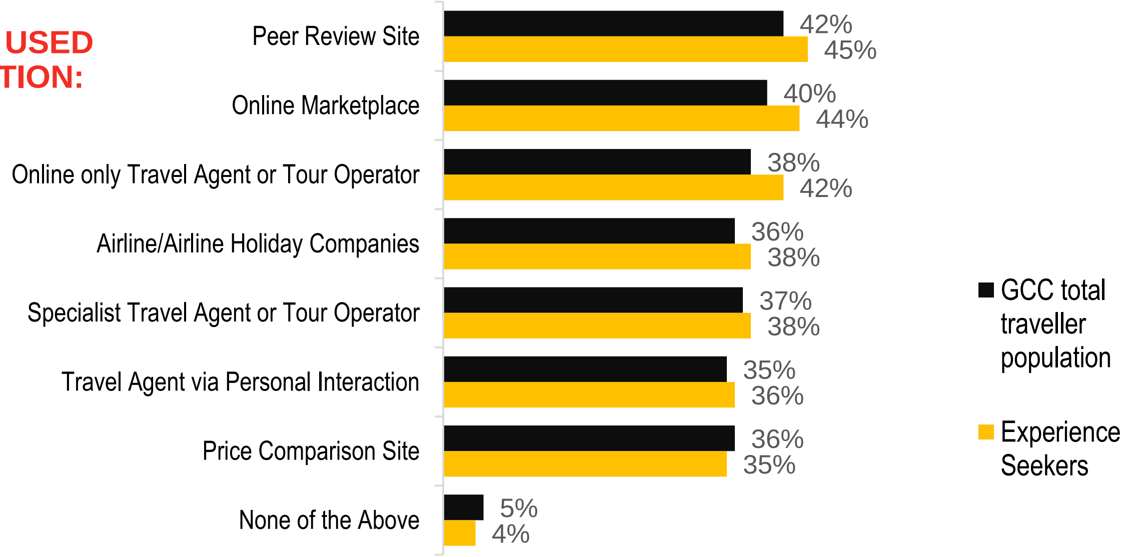
Experience Seekers show a higher usage of specialist and online travel agents in their planning & booking phase.

The majority are using multiple resources in the booking phase, with almost half (49%) using 3 or more sources in this final phase of the journey.

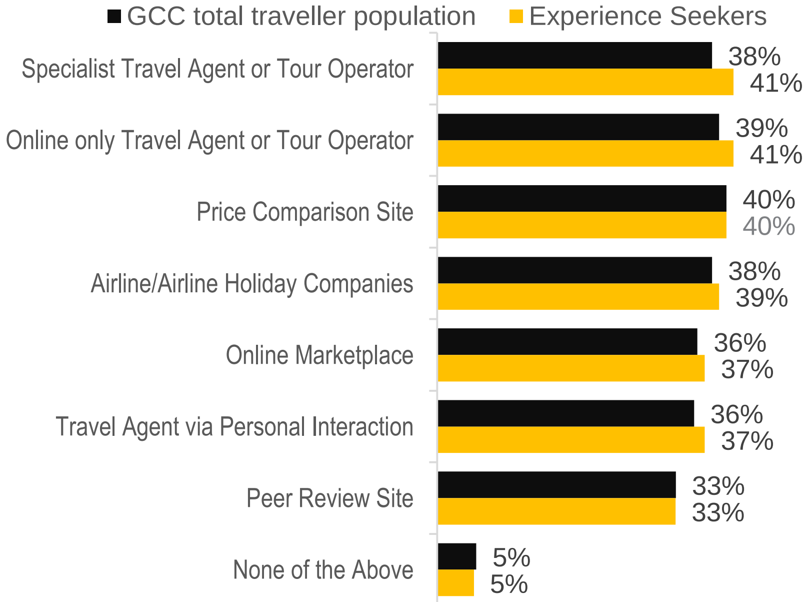
Despite their apparent independence, 39% are booking all elements of their trip (flights and accommodation) together and show a higher propensity to do this via online only Travel agents.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 82% use personal interactions with travel agents throughout their journey, and less than half of these (37%) use them in the booking phase.

RESOURCES USED FOR INSPIRATION:



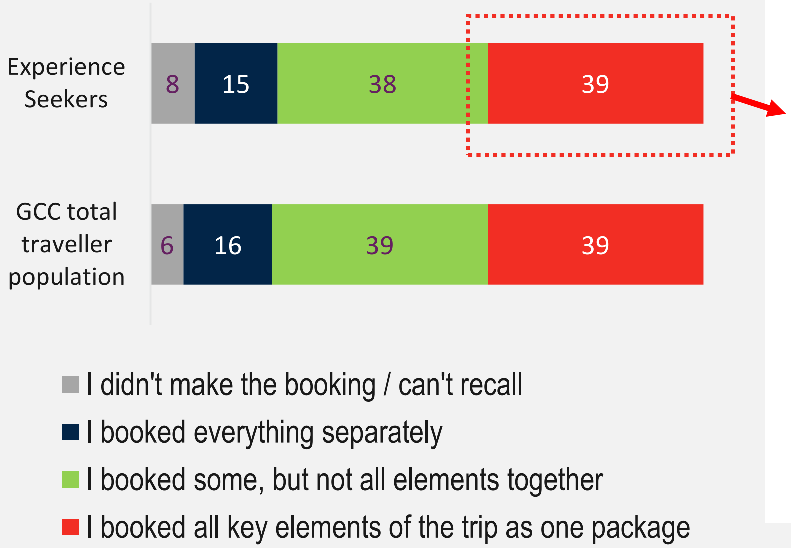
RESOURCES FOR PLANNING:



TOOLS:

74% use more than one resource in the planning/ booking phase of the customer journey vs **69%** other tourists from GCC.

PACKAGE VERSUS SEPARATE BOOKINGS:



PACKAGE BOOKINGS:

Online only travel agent more likely to be used to make package bookings (**22%**) versus other tourists from GCC (**17%**)

82% use travel agents IN PERSON throughout the customer journey vs **78%** for other tourists from GCC

I2 , Resources used; Experience Seekers n=665; total N=1309

VISIT BRITAIN VisitEngland

GERMANY EXPERIENCE SEEKERS

GERMANY EXPERIENCE SEEKERS (22%)

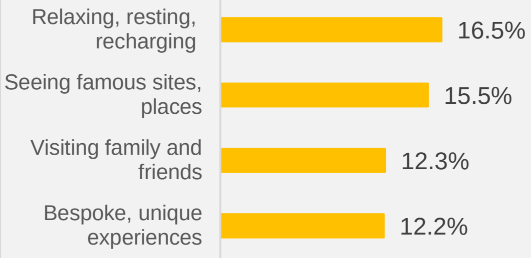
Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel
(vs Germany total traveller population)

Britain 6.9 (vs 6.4)

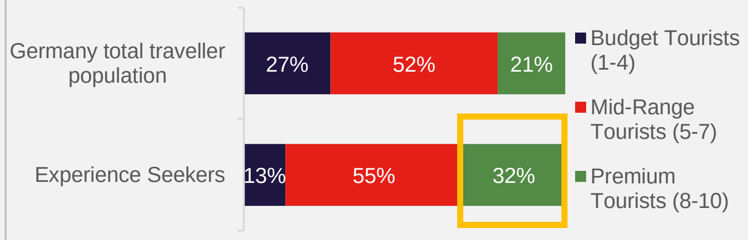
Anywhere internationally **6.7** (vs **6.0**)

Top Holiday Types Preferred (share of preference)



Experience Seekers over-index on potential spend but **PRIORITY Experience Seekers** are a smaller segment in Germany vs other markets representing **7%** of German tourists. They are a unique sub segment which over-index on **younger** tourists, **particularly 18-24 yrs, and females** and driven by new social trends of sustainability and inclusion

Likely spend on 10-point scale, where 10 = super premium and 1 = super budget



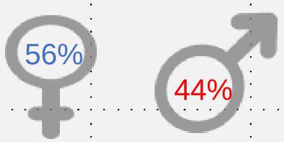
Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved **18% (+5%)**

Sustainability engaged **25% (+12%**

Inclusion seekers **20% (+11%)**

GENDER



SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Recommendations or connections with friends & family **35%**	Recommendations by friends & family on social media **32%**
Travel bloggers and influencers **28%**	Travel websites or webpages **27%**

34% of GB visitors went beyond England (vs **38% Germany other tourists**); and **53%** beyond London (vs **55%** Germany other tourists)

More than half travel with their partner/ spouse, but 1 out of 4 travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- Offers good value for money (82%)
- Is a welcoming place to visit (81%)
- Offers lots of different experiences in one destination (79%)
- It's easy to get around once there (79%)
- It has experiences I can't have anywhere else (78%)

KEY PERCEPTIONS OF BRITAIN:

- There are vibrant towns and cities to explore (54%)
- Offers a lot of different experiences in one destination (51%)
- It's easy to get around once there (50%)
- I can roam around visiting many types of places (49%)
- Offers experiences I want to share on social media (49%)

TOP ACTIVITIY PREFERENCES:

- Explore local food and beverage specialties (67%)
- Visit famous/iconic tourist attractions and places (62%)
- Experience coastal places and scenery (61%)
- Experience city life (61%)
- Enjoy fine dining experiences (59%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

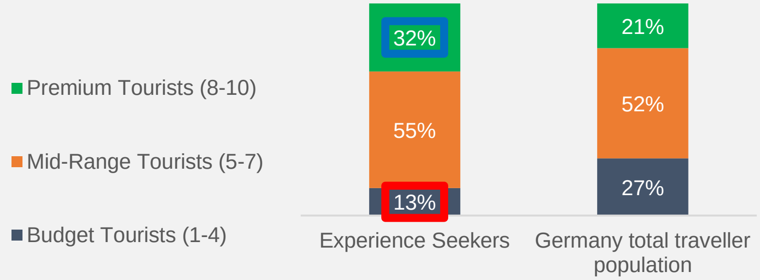
Spain	Italy	Netherlands	USA	France
(59%)	(55%)	(53%)	(50%)	(48%)

Base size: Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies

GERMANY EXPERIENCE SEEKERS (22%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **14% (+1%)**

Sustainability engaged **18% (+5%)**

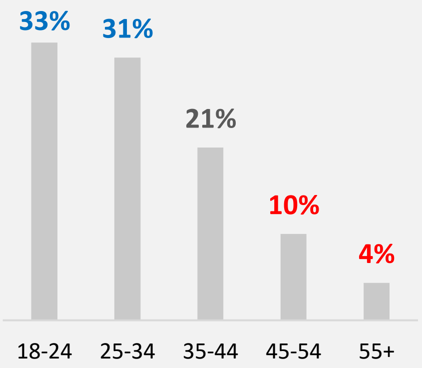
Inclusion seekers **12% (+2%)**

LIVING

27% (-3%) have kids, the split is between kids <12 and 12yrs+ is 57% and 43% respectively

AGE

***Modal age: 19 yrs**
Median age: 30 yrs



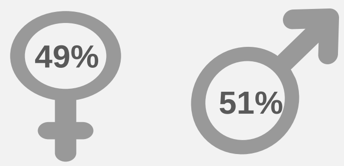
**Age with the highest frequency*

VISITORS (vs total)

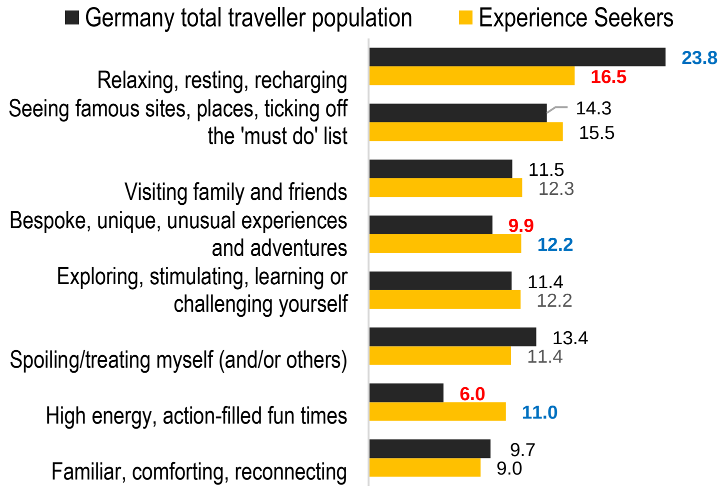
Britain Visitors (P5yrs) **33% (-3%)**

Considerers (P5yrs) **67% (+3%)**

GENDER



TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

Recommendations from friends and family	Travel bloggers	Photography, GIFs, Videos on websites	Information centres in the destination
10%	9%	8%	8%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences I want to share on social media (58%)
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (58%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (76%)
- If I don't visit soon, I'd miss out (59%)
- Is inclusive and accessible for visitors like me. (57%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (39%)
- Offers experiences I want to share on social media (49%)
- A place recommended by friends or family (31%)
- If I don't visit soon, I'd miss out (27%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (56%)
- Participate in sport (38%)
- Experience city life (61%)
- Experience pubs, bars and clubs (54%)
- Visit famous shops or shopping streets/centres (58%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Germany total)

Disproportionately more likely to consider…

USA	SPAIN	ITALY	NETHERLANDS	FRANCE
(+21%)	(+14%)	(+13%)	(+11%)	(+10%)

Base size: Experience Seekers n=223; Total n=1,004

GERMANY: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

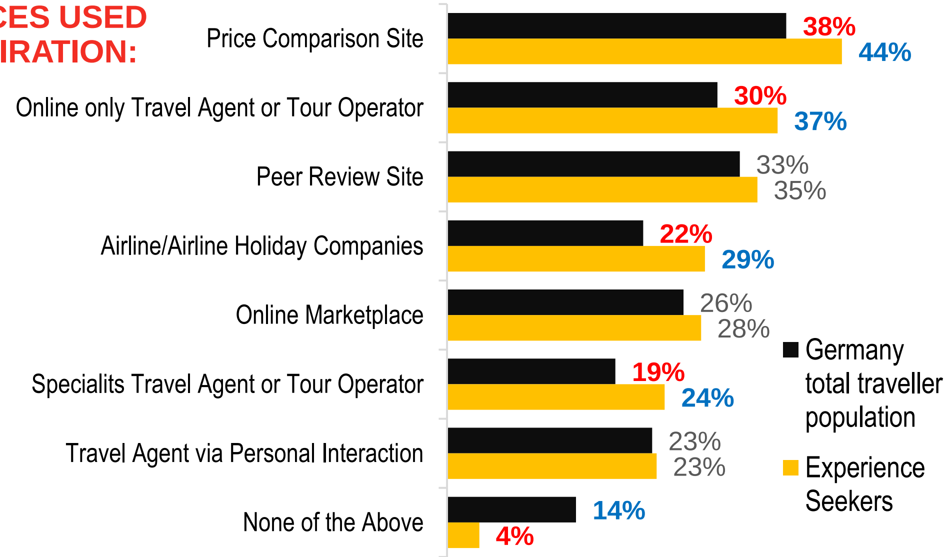
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators.

The majority are using multiple resources in the booking phase, with 1 in 4 (25%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 30% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Online Market Places.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 47% use personal interactions with travel agents throughout their journey, and more than half of these (28%) use them in the booking phase.

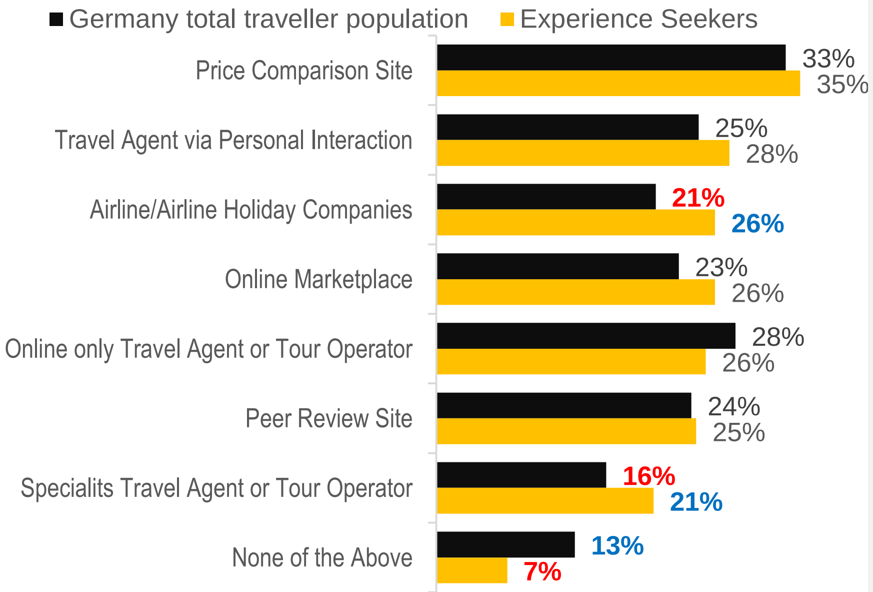
RESOURCES USED FOR INSPIRATION:



TOP INSPIRATIONS:

- Recommendations friends/family(35%)
- Social media – advice recommendations (32%)
- Social media/travel bloggers (28%)
- Travel websites (27%)
- Photography on websites (27%)
- Bargains/deals (26%)

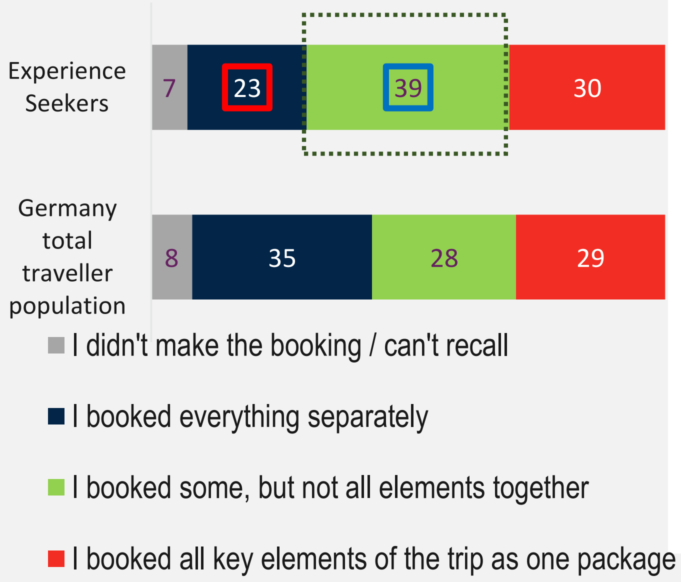
RESOURCES FOR PLANNING:



TOOLS:

51% use more than one resource in the planning/ booking phase of the customer journey vs 44% for other tourists from Germany.

PACKAGE VERSUS SEPARATE BOOKINGS:



Booked:	Package		Travel		Accommodation	
Via:	ES	Non	ES	Non	ES	Non
Online mktplace	18%	8%			22 %	14 %
Price compariso n site	22%	14%				
Specialist travel agent			8%	3%		

**Data show only stakeholders which are used more by Experience Seekers compared to other segments in the market.*
***Package option likely to be answered as respondents might have misunderstood this option*

I2 , Resources used; Experience Seekers n=6,677; total N=22,840

INDIA EXPERIENCE SEEKERS

INDIA EXPERIENCE SEEKERS (50%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel (vs India total traveller population)

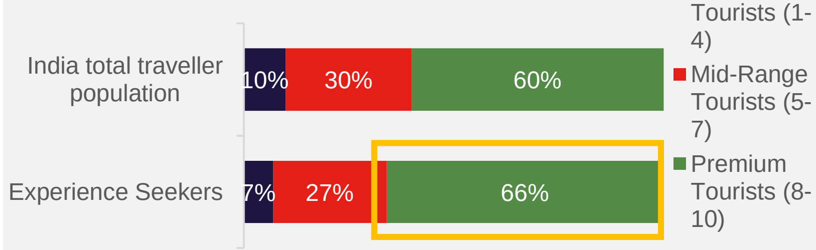
Britain	8.1 (vs 8.0)
Anywhere internationally	7.6 (vs 7.5)

Top Holiday Types Preferred (share of preference)

Holiday type	Share
Seeing famous sites, places	15.3%
High energy, action-filled fun times	13.5%
Relaxing, resting, recharging	13.2%
Exploring or challenging yourself	13.1%

Experience Seekers over-index on potential spend but **PRIORITY Experience Seekers** are a larger segment in India vs other markets (13%) representing **33%** of Indian tourists. It is a unique sub-segment which over-indexes on **younger tourists, particularly 18-34 yrs** who are interested in **wellbeing and inclusion**

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved **21% (+4%)**

Sustainability engaged **40% (+2%)**

Inclusion seekers **42% (+6%)**

GENDER

Female 51%

Male 49%

SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Travel bloggers and influencers **53%**	Recommendations by friends & family on social media **49%**
Travel websites or web pages **45%**	National Tourist Board websites **45%**

72% of GB visitors went beyond England (vs **73%** India other tourists); and **95%** beyond London (vs **93%** India other tourists)

55% travel with their partner/ spouse, but **27%** travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- Is a welcoming place to visit (92%)
- Has an interesting mix of cultures from around the world (91%)
- It has surprising and unexpected experiences (91%)
- There is beautiful coast and countryside to explore (91%)
- Offers good value for money (91%)

KEY PERCEPTIONS OF BRITAIN:

- I can roam around visiting many types of places (60%)
- Is a place where I can explore history and heritage (59%)
- There is a good variety of food and drink to try (59%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (59%)
- Is a welcoming place to visit (58%)

TOP ACTIVITIY PREFERENCES:

- Visit famous/iconic tourist attractions and places (84%)
- Visit famous shops or shopping streets/centres (80%)
- Enjoy fine dining experiences (80%)
- Experience coastal places and scenery (79%)
- Explore history and heritage (historical sites, architecture) (79%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

USA	SWITZERLAND	AUSTRALIA	FRANCE	GERMANY
(75%)	(74%)	(71%)	(65%)	(61%)

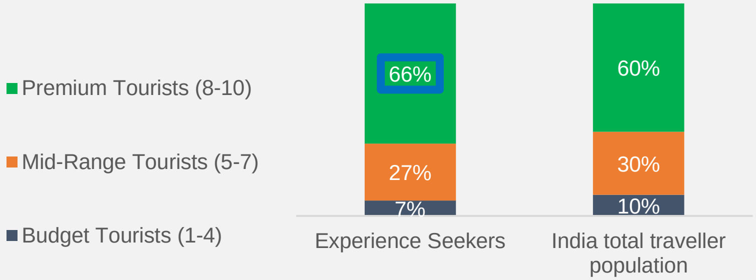
Base size: Experience Seekers n=513; Total India n=1,026; global weighting applies

VISIT BRITAIN VisitEngland

INDIA EXPERIENCE SEEKERS (50%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **17%**

Sustainability engaged **35% (-3%)**

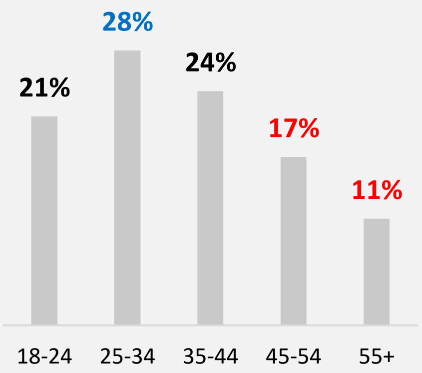
Inclusion seekers **38% (+2%)**

LIVING

44% (+1%) have kids, the split is between kids <12yrs and 12yrs+ is 46% and 54% respectively.

AGE

*Modal age: 35 yrs
Median age: 35 yrs



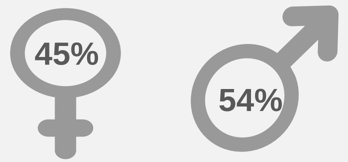
*Age with the highest frequency

VISITORS (vs total)

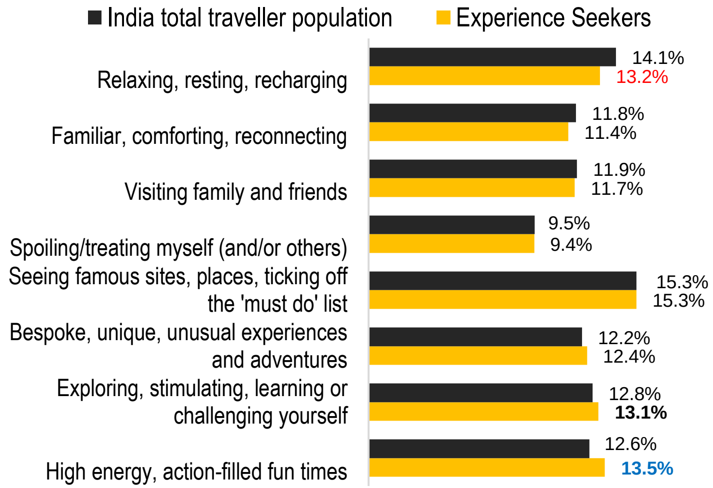
Britain Visitors (P5yrs) **37%**

Considerers (P5yrs) **63%**

GENDER



TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

Photography, GIFS or videos on websites	Local movies or TV programmes	International movies or TV programmes	Travel apps on mobile phones
4%	3%	3%	3%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences I want to share on social media (87%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (90%)
- It has surprising and unexpected experiences (91%)
- Has an interesting mix of cultures from around the world (91%)
- Has a thriving arts and contemporary culture scene (86%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Is a place where I can explore history and heritage (59%)
- It offers the opportunity to travel sustainably/responsibly (56%)
- Offers experiences I want to share on social media (57%)
- I can roam around visiting many types of places (60%)
- Is good to visit at any time of year (51%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (78%)
- Experience pubs, bars and clubs (70%)
- Attend a sporting event (72%)
- Attend a live music festival/event (72%)
- Experience city life (75%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs India total)

Disproportionately more likely to consider…

AUSTRALIA	SWITZERLAND	USA	FRANCE	GERMANY
(+4%)	(+3%)	(+3%)	(+3%)	(+2%)

INDIA: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

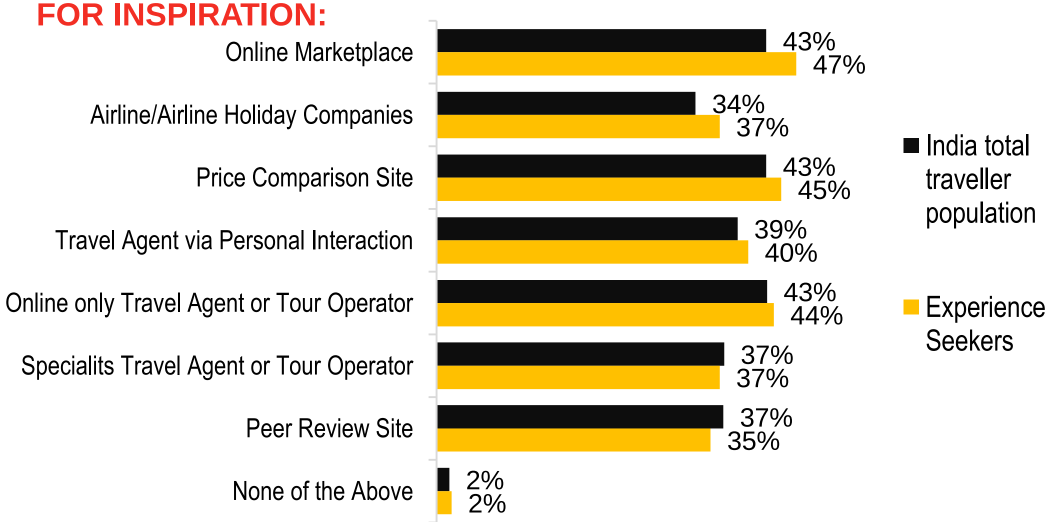
Experience Seekers show a higher usage of online travel agents in their planning & booking phase, alongside greater use of online marketplace. They are also being driven by bargains/deals more than we see in non European markets

The majority are using multiple resources in the booking phase, with half of them (49%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 52% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via online travel agent.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 70% use personal interactions with travel agents throughout their journey, and more than half of these (59%) use them in the booking phase.

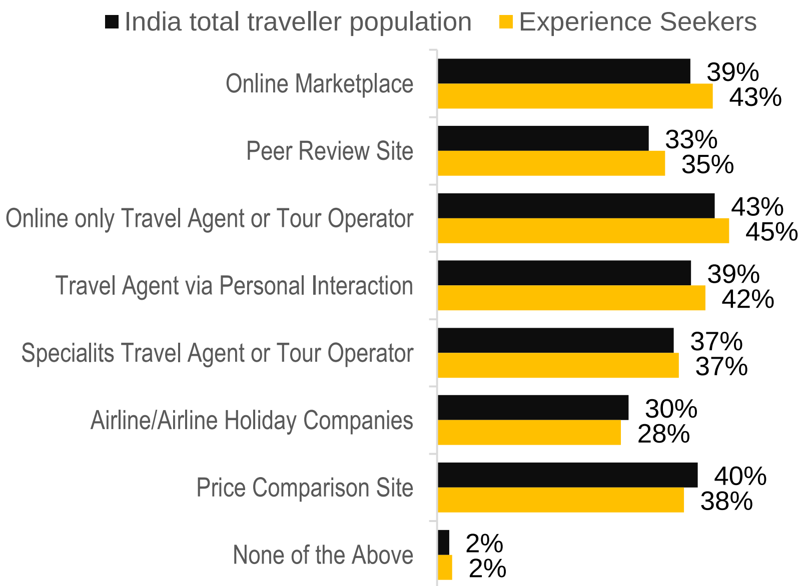
RESOURCES USED FOR INSPIRATION:



TOP INSPIRATIONS:

- Travel bloggers and influencers (53%)
- Recommendations by friends/family on social media (49%)
- Travel websites and web pages (45%)
- National Tourist Board (45%)
- Recommendations by friends and family (44%)

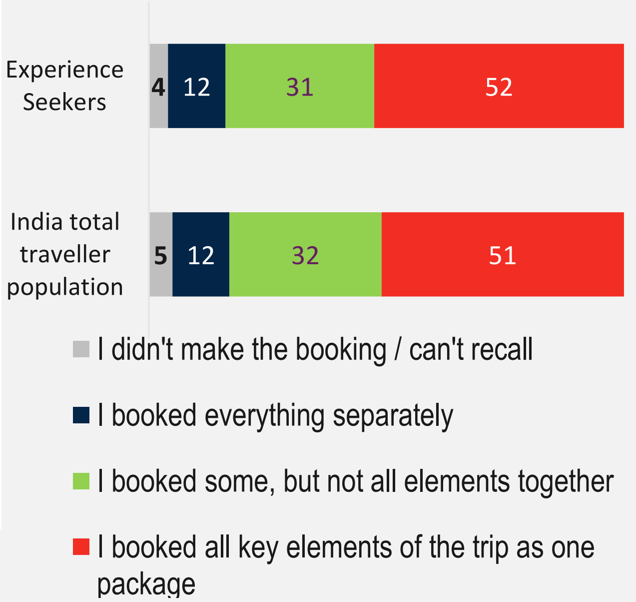
RESOURCES FOR PLANNING:



TOOLS:

76% use more than one resource in the planning/ booking phase of the customer journey vs 74% for other tourists from India.

PACKAGE VERSUS SEPARATE BOOKINGS:



EXPERIENCE SEEKER BOOKING HABITS:

Booked:	Package	Accommodation	Travel
Online marketplace	20%*	19%	18%
Price comparison site	17%	16%	17%
Online travel agent	22%	23%	27%
Specialist travel agent	16%	13%	9%
In-person travel agents	16%	20%	18%
Directly with provider	9%	8%	11%

**Package option likely to be answered as respondents might have misunderstood this option*

I2 , Resources used; Experience Seekers n=513; total India N=1,026; global weighting applies

ITALY EXPERIENCE SEEKERS

VISIT BRITAIN

VisitEngland

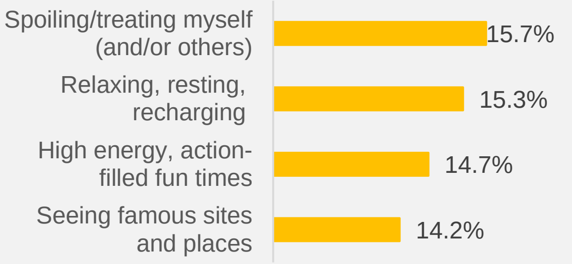
ITALY EXPERIENCE SEEKERS (26%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel (vs India total traveller population)

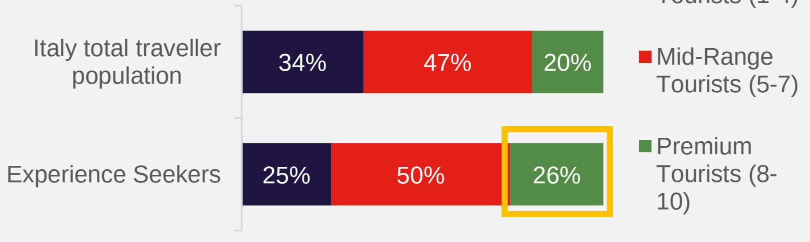
Britain	7.2 (vs 6.6)
Anywhere internationally	6.4 (vs 5.9)

Top Holiday Types Preferred (share of preference)



Experience Seekers over-index on potential spend but **PRIORITY Experience Seekers** are a smaller segment in Italy vs other markets (13%) representing **7%** of Italian tourists. It is a unique sub-segment which over-indexes on **males, younger tourists, particularly 18-34 yrs** who are interested in **inclusion.**

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



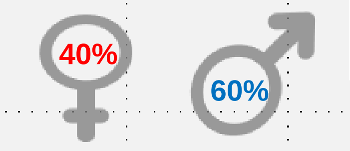
Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved **21% (+6%)**

Sustainability engaged **30% (+8%)**

Inclusion seekers **34% (+12%)**

GENDER



SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Recommendations by friends & family on social media **32%**	Travel bloggers and influencers **29%**
National Tourist Board websites **29%**	Travel websites or web pages **28%**

49% of GB visitors went beyond England (vs **42%** Italy other tourists); and **56%** beyond London (vs **59%** Italy other tourists)

62% travel with their partner/ spouse, but 20% travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- I can roam around visiting many types of places (86%)
- It has surprising and unexpected experiences (86%)
- There is beautiful coast and countryside to explore (86%)
- Offers good value for money (84%)
- Offers a lot of different experiences in one destination (84%)

KEY PERCEPTIONS OF BRITAIN:

- Is a place where I can explore history and heritage (55%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (54%)
- I can roam around visiting many types of places (53%)
- Is a mixture of old and new (52%)
- Has an interesting mix of cultures from around the world (51%)

TOP ACTIVITIY PREFERENCES:

- Explore history and heritage (historical sites, architecture) (70%)
- Visit famous/iconic tourist attractions and places (67%)
- Experience coastal places and scenery (66%)
- Explore local food and beverage specialties (61%)
- Visit museums or galleries (60%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

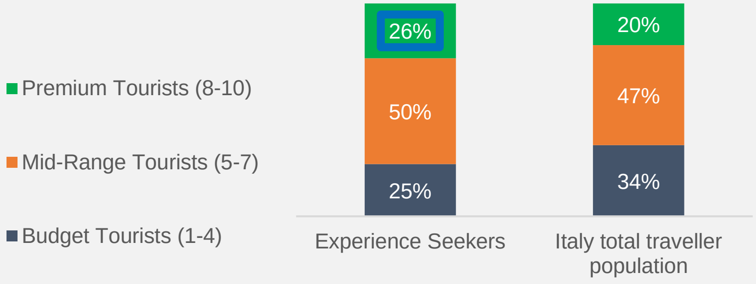
SPAIN	FRANCE	GREECE	USA	SWITZERLAND
(52%)	(45%)	(42%)	(41%)	(36%)

Base size: Experience Seekers n=261; Total Italy n=1,000; global weighting applies

ITALY EXPERIENCE SEEKERS (26%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **16% (+1%)**

Sustainability engaged **21% (-1%)**

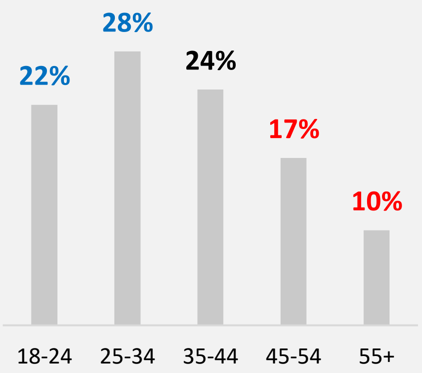
Inclusion seekers **23% (+1%)**

LIVING

31% (-1%) have kids, the split is between kids <12yrs and 12yrs+ is 49% and 51% respectively.

AGE

***Modal age: 21 yrs**
Median age: 35 yrs



*Age with the highest frequency

VISITORS (vs total)

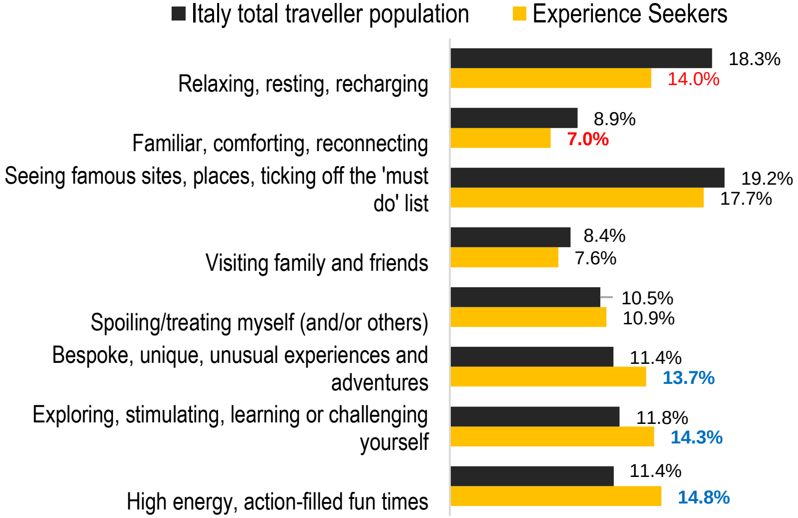
Britain Visitors (P5yrs) **32% (+3%)**
Considerers (P5yrs) **68% (-3%)**

GENDER

54%

46%

TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

Local movies or TV programmes	Travel bloggers and influencers	Sporting events, festivals & activities	Music, concerts, tours
7%	7%	6%	6%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences I want to share on social media (58%)
- If I don't visit soon, I'd miss out. (60%)
- It has surprising and unexpected experiences (86%)
- There is a good variety of food and drink to try (80%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (57%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- There is a good variety of food and drink to try (33%)
- There is beautiful coast and countryside to explore (39%)
- Offers experiences I want to share on social media (43%)
- It has experiences I can't have anywhere else (43%)
- If I don't visit soon, I'd miss out (24%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (52%)
- Participate in sport (28%)
- Self driving tours (47%)
- Attend a sporting event (34%)
- Experience pubs, bars and clubs (51%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Italy total)

Disproportionately more likely to consider…

USA	NETHERLANDS	GERMANY	SWITZERLAND	AUSTRIA
(+11%)	(+8%)	(+7%)	(+6%)	(+6%)

Base size: Experience Seekers n=261; Total n=1,000; global weighting applies

ITALY: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

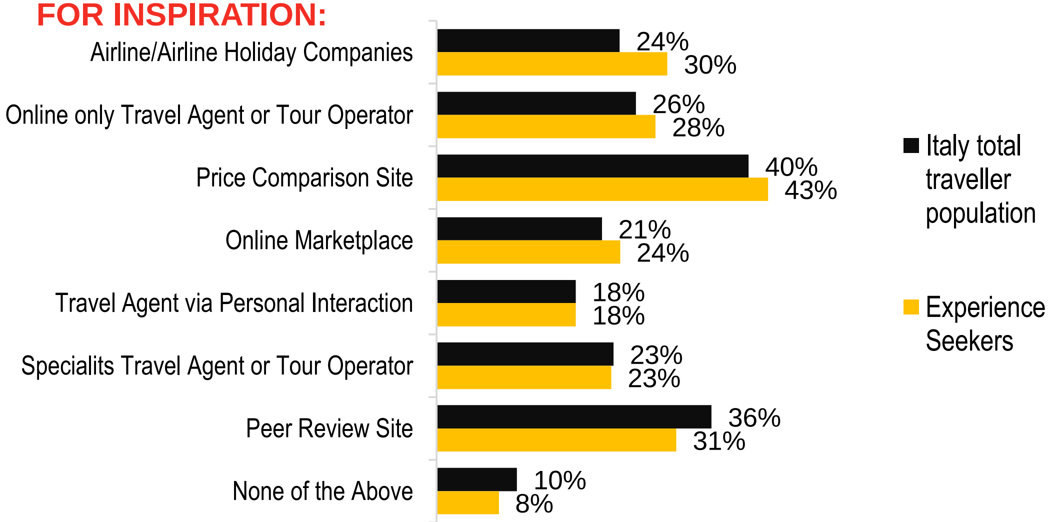
Experience Seekers show a higher usage of price comparison site in their planning & booking phase, alongside greater use of peer review site. They are also being driven by bargains/deals more than we see in non European markets

The majority are using multiple resources in the booking phase, with one in 4 (22%) using 3 or more sources in this final phase of the journey.

8% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Online travel agent.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 40% use personal interactions with travel agents throughout their journey, and 45% of these people use in person travel agents in the booking phase.

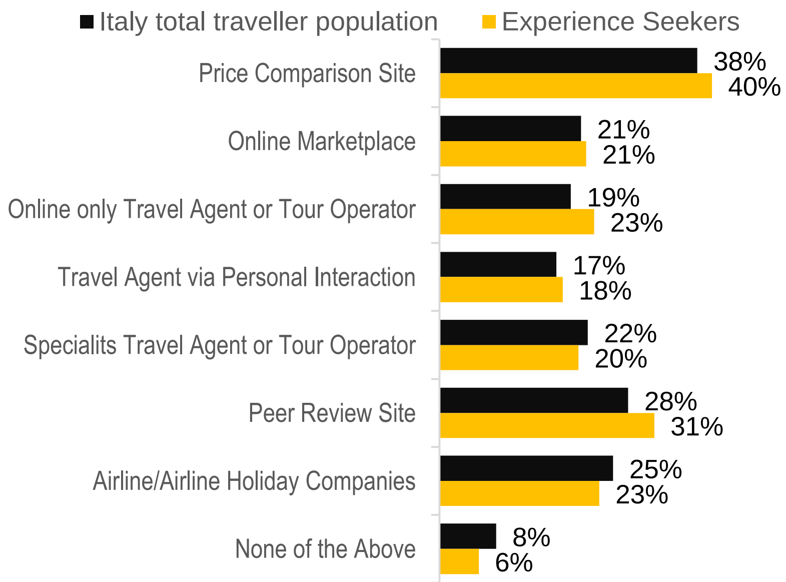
RESOURCES USED FOR INSPIRATION:



TOP INSPIRATIONS:

- Recommendations by friends/family on social media (32%)
- Travel bloggers and influencers (29%)
- National Tourist Board (29%)
- Travel websites and web pages (28%)
- Photography, GIFS or videos on social media (28%)

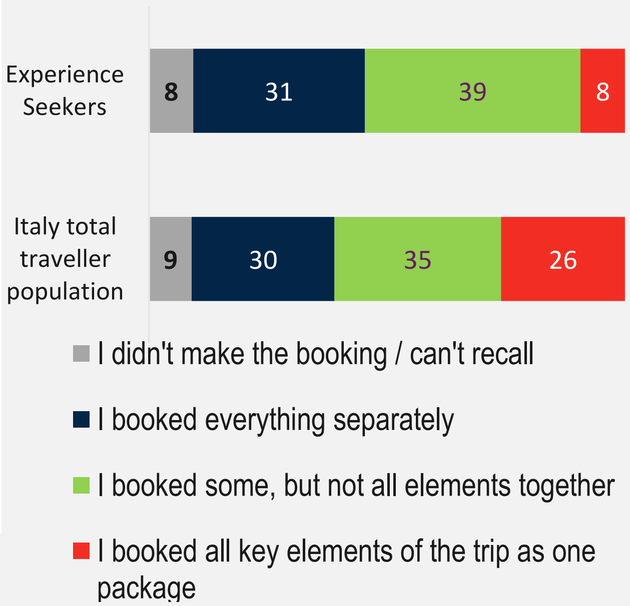
RESOURCES FOR PLANNING:



TOOLS:

51% use more than one resource in the planning/ booking phase of the customer journey vs 46% for other tourists from Italy.

PACKAGE VERSUS SEPARATE BOOKINGS:



EXPERIENCE SEEKER BOOKING HABITS:

Booked:	Package	Accommodation	Travel
Online marketplace	10%*	19%	17%
Price comparison site	23%	26%	33%
Online travel agent	23%	18%	12%
Specialist travel agent	15%	10%	9%
In-person travel agents	17%	8%	10%
Directly with provider	12%	12%	14%

**Package option likely to be answered as respondents might have misunderstood this option*

I2 , Resources used; Experience Seekers n=261; total N=1,000; global weighting applies

NETHERLANDS EXPERIENCE SEEKERS

VISIT BRITAIN

VisitEngland

NETHERLANDS EXPERIENCE SEEKERS (25%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel (vs India total traveller population)

Britain 7.0 (vs 6.4)

Anywhere internationally 6.3 (vs 5.5)

Top Holiday Types Preferred (share of preference)

Holiday type	Share
Seeing famous sites, places	17.7%
High energy, action-filled fun times	14.8%
Exploring or challenging yourself	14.3%
Relaxing, resting, recharging	14.0%

Experience Seekers over-index on potential spend but **PRIORITY Experience Seekers** are a smaller segment in Netherlands vs other markets (13%) representing **8%** of Netherlands' tourists. It is a unique sub-segment which over-indexes on **younger tourists, particularly 18-34 yrs** who are interested in **wellbeing, sustainability, and inclusion.**

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget

	Budget Tourists (1-4)	Mid-Range Tourists (5-7)	Premium Tourists (8-10)
Netherlands total traveller population	16%	57%	28%
Experience Seekers	12%	55%	32%

Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved **17% (+9%)**

Sustainability engaged **25% (+15%)**

Inclusion seekers **26% (+10%)**

GENDER

53%

45%

SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Recommendations by friends & family **40%**	Travel websites or web pages **30%**
Recommendations by friends & family on social media **29%**	Photography, GIFS or videos on websites **28%**

23% of GB visitors went beyond England (vs **34%** Netherlands other tourists); and **59%** beyond London (vs **56%** Netherlands other tourists)

46% travel with their partner/ spouse, but 27% travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- Offers a lot of different experiences in one destination (85%)
- It has experiences I can't have anywhere else (84%)
- Offers good value for money (84%)
- There is a good variety of food and drink to try (81%)
- I can roam around visiting many types of places (81%)

KEY PERCEPTIONS OF BRITAIN:

- Is a place where I can explore history and heritage (61%)
- Is a mixture of old and new (60%)
- I can roam around visiting many types of places (57%)
- It's easy to get around once there (56%)
- Is inclusive and accessible for visitors like me (56%)

TOP ACTIVITIY PREFERENCES:

- Explore local food and beverage specialties (59%)
- Self-driving tours (54%)
- Experience city life (50%)
- Visit famous/iconic tourist attractions and places (49%)
- Enjoy outdoor walks, hiking or cycling (48%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

SPAIN (49%)

ITALY (43%)

USA (40%)

FRANCE (40%)

GERMANY (37%)

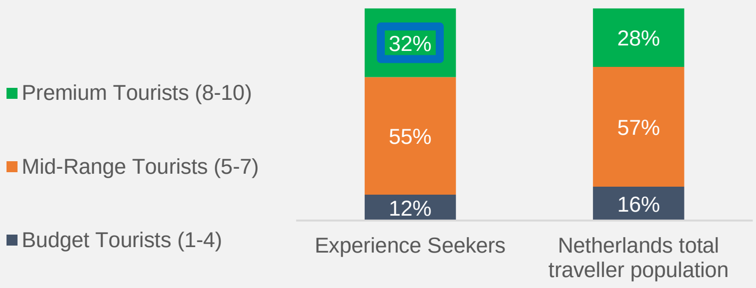
Base size: Experience Seekers n=164; Total Netherlands n=647; global weighting applies

VISIT BRITAIN VisitEngland

NETHERLANDS EXPERIENCE SEEKERS (25%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **11% (+3%)**

Sustainability engaged **12% (+2%)**

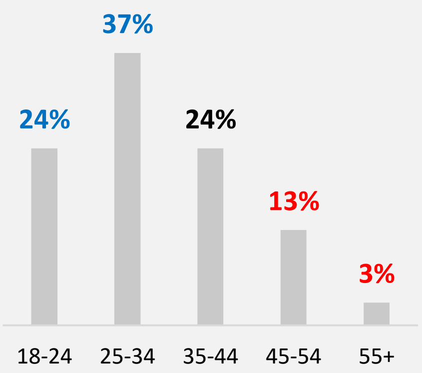
Inclusion seekers **16%**

LIVING

35% (+1%) have kids, the split is between kids <12yrs and 12yrs+ is 56% and 44% respectively.

AGE

***Modal age: 31 yrs**
Median age: 32 yrs



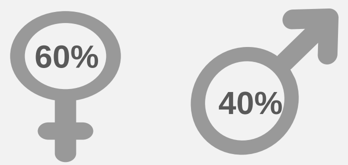
**Age with the highest frequency*

VISITORS (vs total)

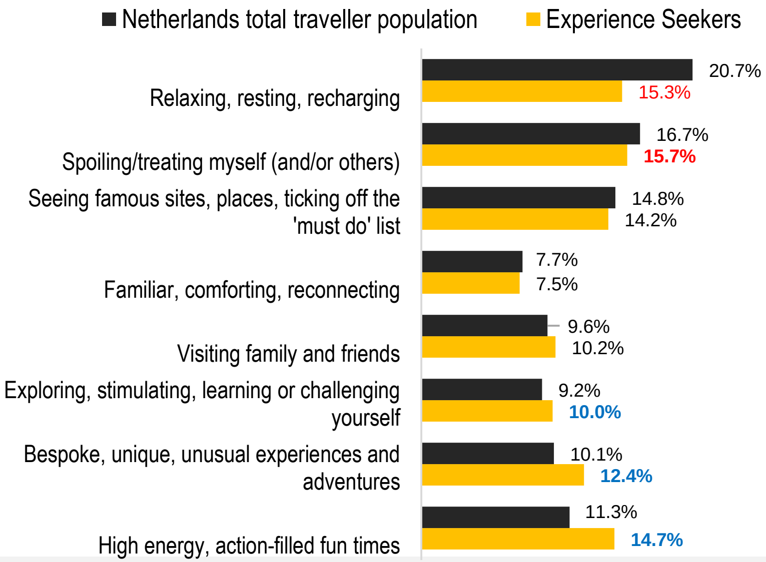
Britain Visitors (P5yrs) **47% (+5%)**

Considerers (P5yrs) **53% (-5%)**

GENDER



TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

Recommendations by friends & family on social media	Photography, GIFS or videos on websites	Information centres in the destination	Music, concerts, tours
9%	8%	7%	6%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences I want to share on social media (55%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (63%)
- If I don't visit soon, I'd miss out (50%)
- There is a good variety of food and drink to try (81%)
- A place recommended by friends or family (61%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers experiences I want to share on social media (41%)
- A place recommended by friends or family (34%)
- If I don't visit soon, I'd miss out (20%)
- A good place for treating myself (38%)
- It offers the opportunity to travel sustainably/responsibly (35%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (48%)
- Experience pubs, bars and clubs (48%)
- Attend a learning course (cooking, language etc) (30%)
- Visit theatre, opera, ballet or musicals (31%)
- Visit literary, music, film and TV locations (30%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Netherlands total)

Disproportionately more likely to consider…

USA	ITALY	SWITZERLAND	IRELAND	SPAIN
(+15%)	(+12%)	(+7%)	(+8%)	(+8%)

Base size: Experience Seekers n=164; Total n=647; global weighting applies

NETHERLANDS: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

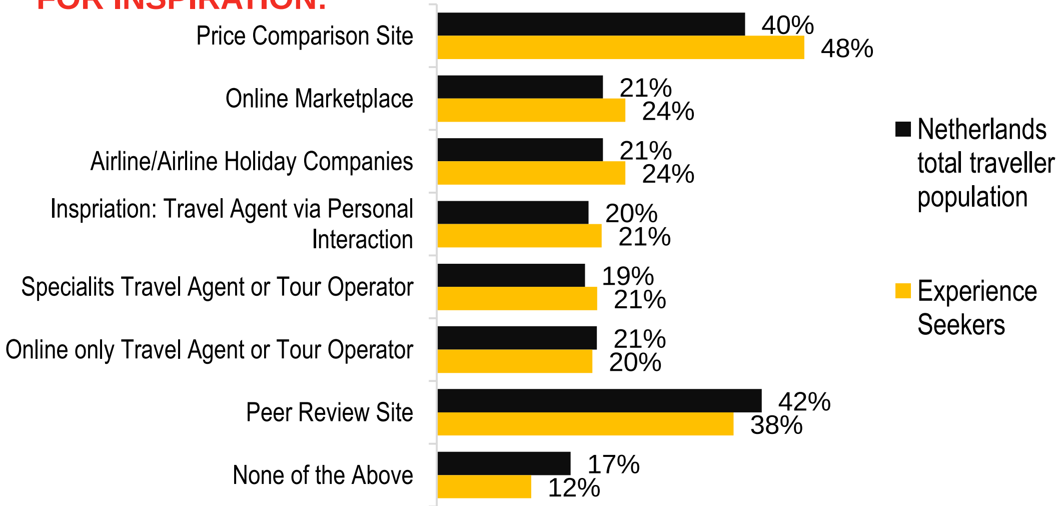
Experience Seekers show a higher usage of peer review site in their planning & booking phase, alongside greater use of price comparison site. They are also being driven by bargains/deals more than we see in non European markets

The majority are using multiple resources in the booking phase, with one in 5 (17%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 29% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via price comparison site.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 46% use personal interactions with travel agents throughout their journey, and 39% of these people use in-person travel agent in the booking phase.

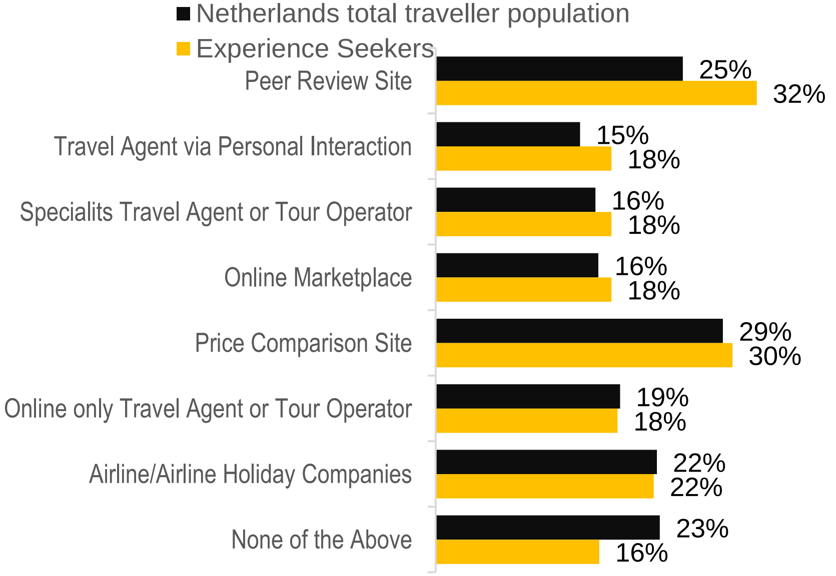
RESOURCES USED FOR INSPIRATION:



TOP INSPIRATIONS:

- Recommendations friends/family (40%)
- Travel websites and web pages (30%)
- Recommendations friends/family on social media (29%)
- Photography, GIFS or videos on websites 28%)
- Bargain deals on airfares or tours (25%)

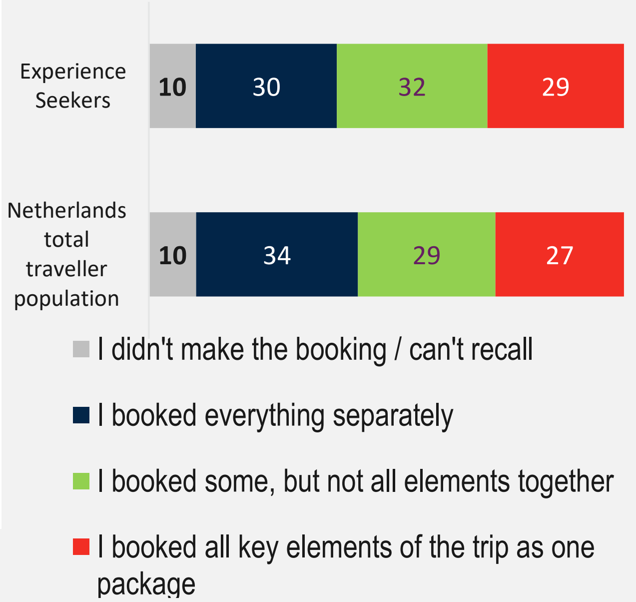
RESOURCES FOR PLANNING:



TOOLS:

46% use more than one resource in the planning/ booking phase of the customer journey vs 38% for other tourists from Netherlands.

PACKAGE VERSUS SEPARATE BOOKINGS:



EXPERIENCE SEEKER BOOKING HABITS:

Booked:	Package	Accommodation	Travel
Online marketplace	9%	14%	12%
Price comparison site	40%	33%	28%
Online travel agent	13%	10%	11%
Specialist travel agent	4%	8%	10%
In-person travel agents	9%	10%	8%
Directly with provider	21%	18%	24%

**Package option likely to be answered as respondents might have misunderstood this option*

I2 , Resources used; Experience Seekers n=164; total N=647; global weighting applies

SAUDI ARABIA EXPERIENCE SEEKERS

VISIT BRITAIN
VisitEngland

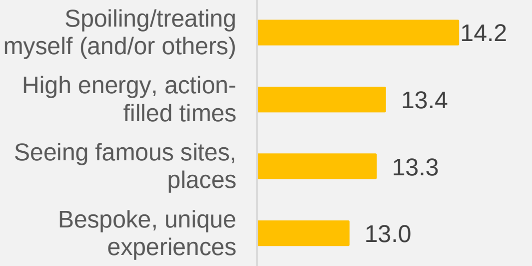
SAUDI ARABIA EXPERIENCE SEEKERS (55%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel
(vs Saudi Arabia total traveller population)

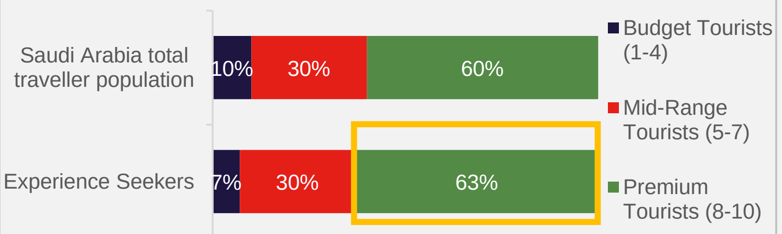
Britain	8.1 (vs 8.1)
Anywhere internationally	7.4 (vs 7.3)

Top Holiday Types Preferred (share of preference)



PRIORITY Experience Seekers (highlighted) represent **35%** of SA tourists, and a unique sub-segment which over-index on being **female with a slight bias to older** and interested in **new tourism trends of inclusion and sustainability**.

Likely spend on 10-point scale, where 10 = super premium and 1 = super budget



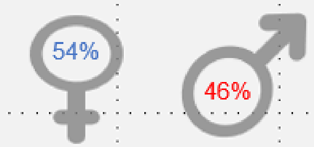
PRIORITY Experience Seekers are trend endorsers (vs total):

Wellbeing involved **32% (+6%)**

Sustainability engaged **52% (+10%)**

Inclusion seekers **55% (+11%)**

GENDER



SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Recommendations by friends & family on social media **54%**	Travel bloggers, influencers **49%**
Recommendations or connections with friends & family **44%**	National Tourist Board Websites **39%**

52% of GB visitors went beyond England (vs **54%** Saudi Arabia other tourists); and **86%** beyond London (vs **86%** Saudi Arabia other tourists)

2 out of 3 travel with their partner/ spouse, but half of them travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- Offers good value for money (94%)
- I can roam around visiting many types of places (94%)
- Is inclusive and accessible for visitors like me (94%)
- It has experiences I can't have anywhere else (93%)
- Is a welcoming place to visit (93%)

KEY PERCEPTIONS OF BRITAIN:

- Has an interesting mix of cultures from around the world (57%)
- Is a place where I can explore history and heritage (56%)
- A good place for treating myself (56%)
- There are vibrant towns and cities to explore (55%)
- I can roam around visiting many types of places (55%)

TOP ACTIVITIY PREFERENCES:.

- Visit famous shops or shopping streets/centres (83%)
- Experience coastal places and scenery (82%)
- Visit famous/iconic tourist attractions and places (81%)
- Explore local food and beverage specialties (81%)
- Participate in action and adventure experiences (80%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

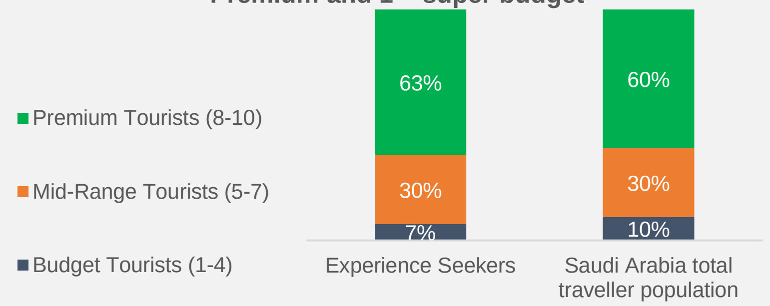
Italy	USA	Switzerland	Spain	France
(63%)	(63%)	(61%)	(61%)	(59%)

Base size: Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies

SAUDI ARABIA EXPERIENCE SEEKERS (55%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **28% (+2%)**

Sustainability engaged **44% (+2%)**

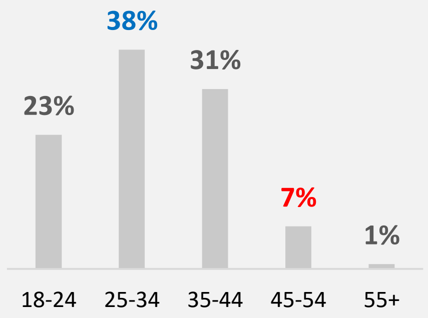
Inclusion seekers **48% (+5%)**

LIVING

59% (+3%) have kids, and the split is between kids <12 and 12yrs+ is 63% and 37% respectively

AGE

*Modal age: 32yrs
Median age: 22yrs



Age with the highest frequency

VISITORS (vs total)

Britain Visitors (P5yrs) **44% (+1%)**

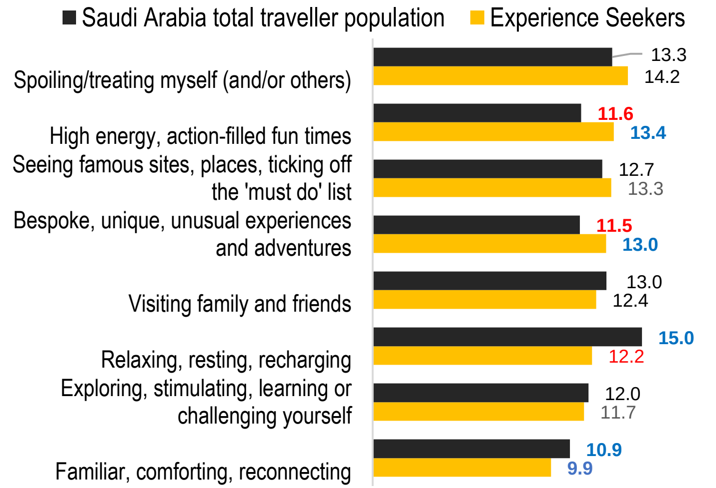
Considerers (P5yrs) **56% (-1%)**

GENDER

51%

49%

TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

Recommendations or connections with friends & family	National tourist boards	Travel apps	Travel bloggers and influencers
4%	3%	2%	2%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Is good to visit at any time of year (92%)
- It has experiences I can't have anywhere else (93%)
- Is inclusive and accessible for visitors like me (94%)
- There are interesting local people to meet (85%)
- Is a place where I can explore history and heritage (88%)
- I can roam around visiting many types of places (94%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers a lot of different experiences in one destination (54%)
- Is good to visit at any time of year (47%)
- If I don't visit soon, I'd miss out (45%)
- There is a good variety of food and drink to try (51%)
- It's easy to get to (52%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (80%)
- Visit famous shops or shopping streets/centres (83%)
- Visit literary, music, film and TV locations (67%)
- Experience city life (79%)
- Participate in sport (62%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Saudi Arabia total)

Disproportionately more likely to consider…

USA	AUSTRIA	ITALY	GERMANY	SPAIN
(+5%)	(+3%)	(+3%)	(+3%)	(+3%)

Base size: Experience Seekers n=355; Total n=647

SAUDI ARABIA: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

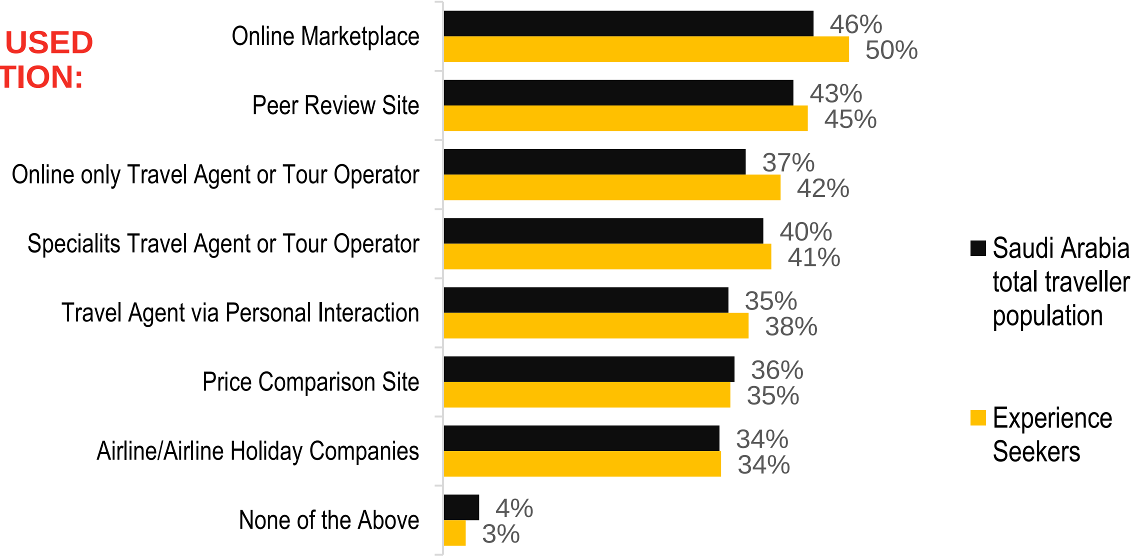
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators.

The majority are using multiple resources in the booking phase, with almost half (46%) using 3 or more sources in this final phase of the journey.

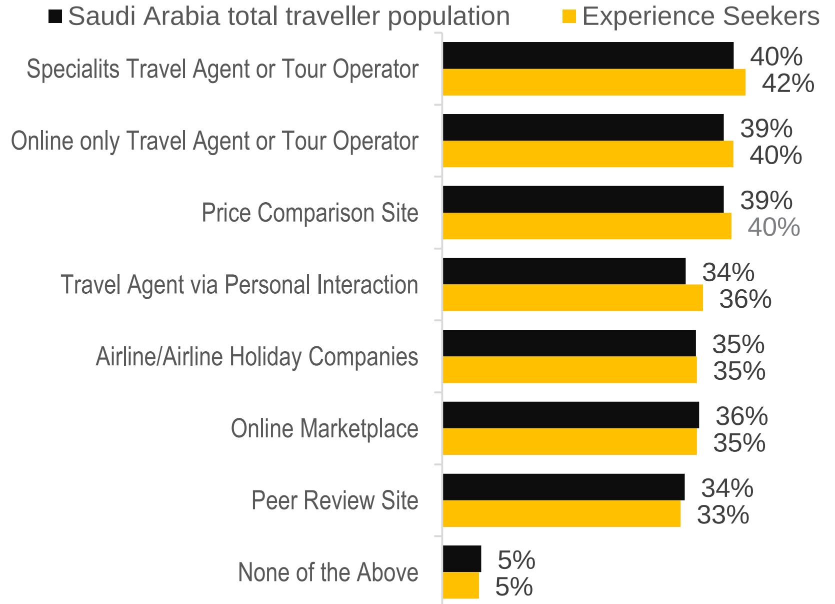
Despite their apparent independence, 39% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Travel agents .

Don't be fooled into thinking Experience Seekers are digital-only customers however – 84% use personal interactions with travel agents throughout their journey, and less than half of these (36%) use them in the booking phase.

RESOURCES USED FOR INSPIRATION:



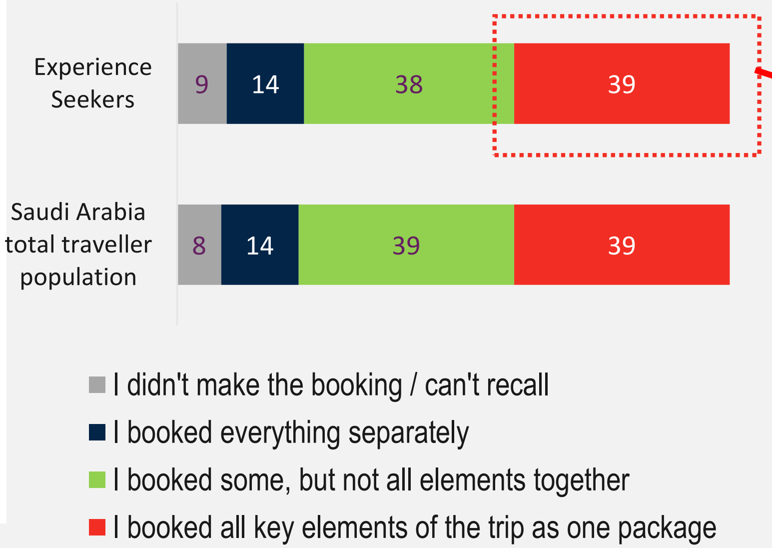
RESOURCES FOR PLANNING:



TOOLS:

71% use more than one resource in the planning/ booking phase of the customer journey vs **69%** other tourists from Saudi Arabia

PACKAGE VERSUS SEPARATE BOOKINGS:



PACKAGE BOOKINGS:

Online only travel agent more likely to be used to make package bookings (**22%**) versus other tourists from Saudi Arabia(**14%**)

84% use travel agents IN PERSON throughout the customer journey vs **77%** for other tourists from Saudi Arabia

I2 , Resources used; Experience Seekers n=6,677; total N=22,840

SPAIN EXPERIENCE SEEKERS

VISIT BRITAIN

VisitEngland

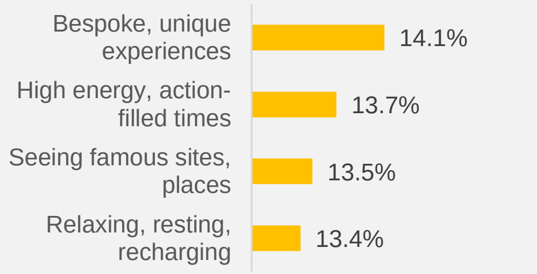
SPAIN EXPERIENCE SEEKERS (28%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel (vs Spain total traveller population)

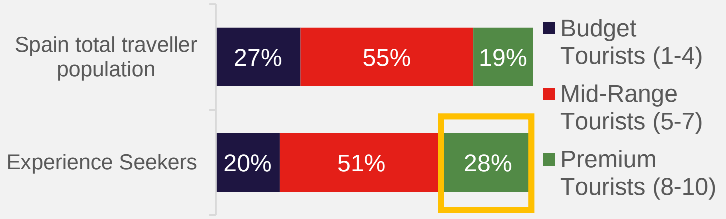
Britain	7.0 (vs 6.8)
Anywhere internationally	6.6 (vs 6.2)

Top Holiday Types Preferred (share of preference)



Experience Seekers over-index on potential spend but **PRIORITY Experience Seekers** are a smaller segment in Spain vs other markets representing **8%** of Spanish tourists. It is a unique sub segment which over-indexes on **younger** tourists, **particularly 18-24 yrs,** but not differentiated by new tourism trends as seen in other countries

Likely spend on 10-point scale, where 10 = super premium and 1 = super budget



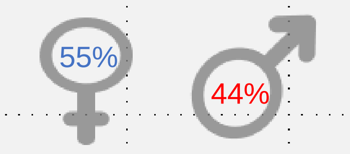
Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved **19% (+2%)**

Sustainability engaged **28% (+7%)**

Inclusion seekers **22% (-2%)**

GENDER



SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Travel bloggers, influencers	Travel websites or webpages
43%	43%
Recommendations or connections with friends & family	Bargain deals on airfares or tours
43%	41%

33% of GB visitors went beyond England (vs **36%** Spain other tourists); and **56%** beyond London (vs **52%** Spain other tourists)

2 out of 3 travel with their partner/ spouse, but 1 out of 5 travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- Offers good value for money (89%)
- There are vibrant towns and cities to explore (87%)
- Offers lots of different experiences in one destination (86%)
- There is a good variety of food and drink to try(86%)
- It's easy to get around once there (86%)

KEY PERCEPTIONS OF BRITAIN:

- Is good for seeing famous sites, places, ticking off the 'must do' list (54%)
- I can roam around visiting many types of places (50%)
- There are interesting local people to meet (50%)
- It's easy to get around once there (48%)
- Is a mixture of old and new (48%)

TOP ACTIVITIY PREFERENCES:

- Explore local food and beverage specialties (72%)
- Experience coastal places and scenery (71%)
- Visit famous/iconic tourist attractions and places (71%)
- Explore history and heritage (historical sites, architecture) (64%)
- Experience rural life and scenery (64%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

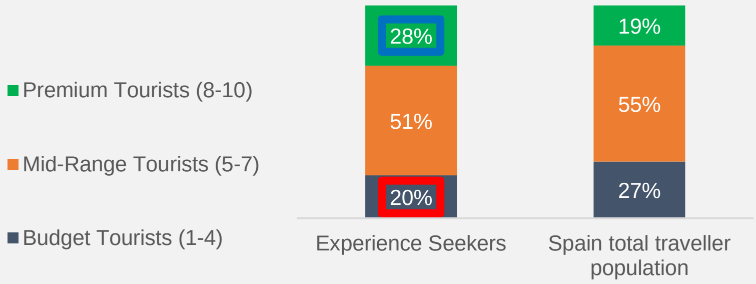
Italy	France	Portugal	USA	Ireland
(60%)	(53%)	(48%)	(45%)	(39%)

Base size: Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies

SPAIN EXPERIENCE SEEKERS (28%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **19% (+2%)**

Sustainability engaged **25% (+4%)**

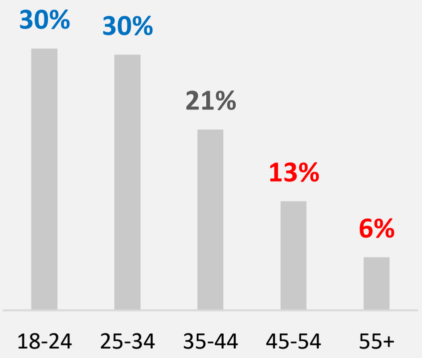
Inclusion seekers **25% (+1%)**

LIVING

38% (-4%) have kids, the split is between kids <12 and 12yrs+ is 47% and 53% respectively

AGE

*Modal age: 19yrs
Median age: 32yrs



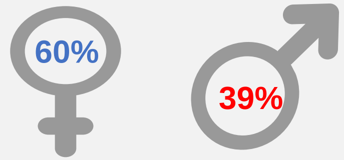
*Age with the highest frequency

VISITORS (vs total)

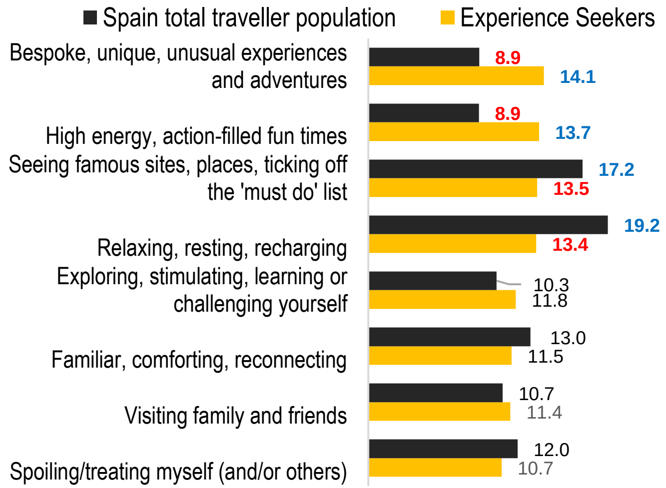
Britain Visitors (P5yrs) **38% (=%)**

Considerers (P5yrs) **62% (=%)**

GENDER



TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

Travel bloggers	Recommendations from friends and family	Sporting events, festivals	Billboards, posters, or outdoor advertising
13%	9%	6%	6%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences I want to share on social media (67%)
- It has surprising and unexpected experiences (85%)
- If I don't visit soon, I'd miss out (68%)
- There are interesting local people to meet (83%)
- There is a good variety of food and drink to try (86%)
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (63%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers experiences I want to share on social media (44%)
- There is a good variety of food and drink to try (43%)
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (38%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (60%)
- Attend a live music festival/event (58%)
- Experience pubs, bars and clubs (53%)
- Participate in sport (33%)
- Socialising with locals (62%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Spain total)

Disproportionately more likely to consider…

USA	NETHERLANDS	ITALY	GERMANY	AUSTRIA
(+11%)	(+10%)	(+10%)	(+8%)	(+8%)

Base size: Experience Seekers n=276; Total n=1,001

VISIT BRITAIN
VisitEngland

SPAIN: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

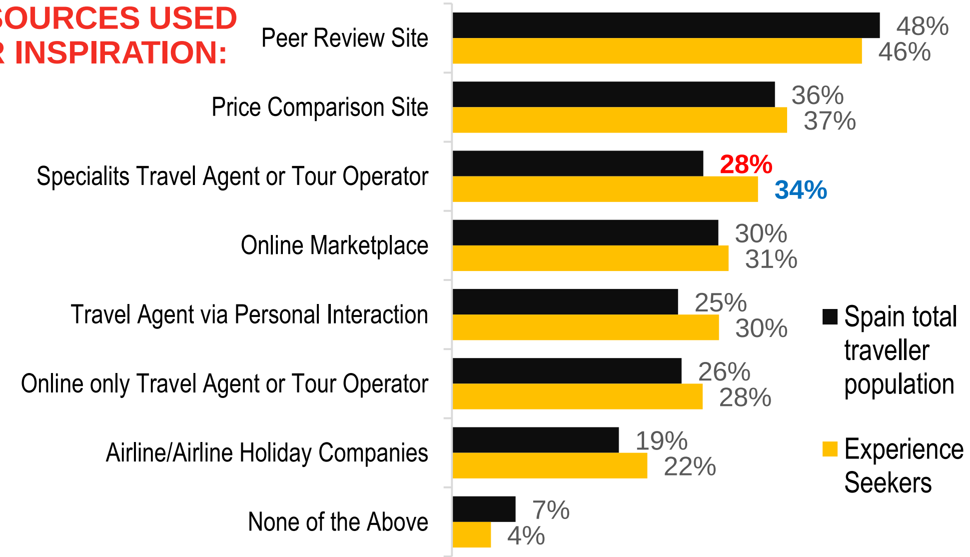
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators. They are also being driven by bargains/deals more than we see in non European markets

The majority are using multiple resources in the booking phase, with 1 in 4 (25%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 34% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Price comparison sites.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 53% use personal interactions with travel agents throughout their journey, and roughly half of these (22%) use them in the booking phase.

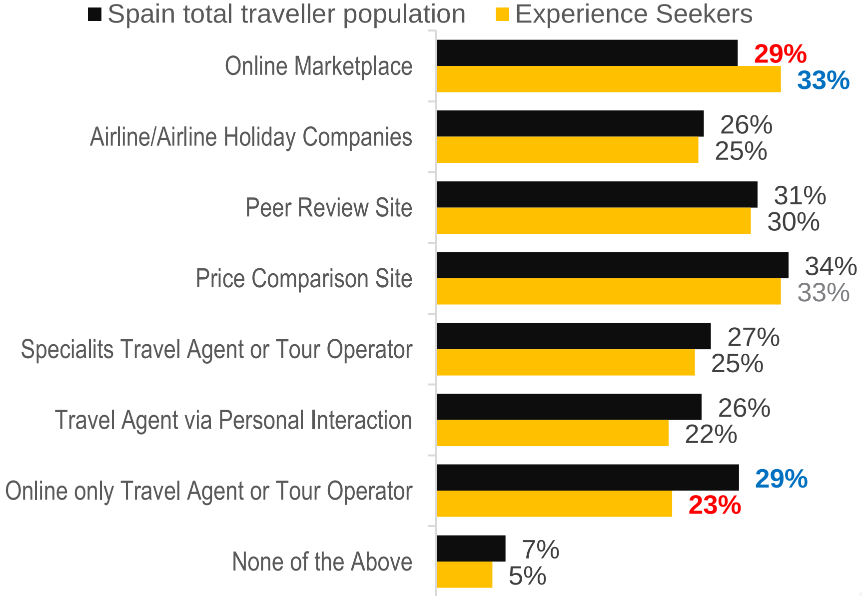
RESOURCES USED FOR INSPIRATION:



TOP INSPIRATIONS:

- Social media/ travel bloggers(43%)
- Travel websites/web pages (43%)
- Recommendations friends/family(43%)
- Bargains deals on airfares/tours(41%)
- Photography, GIFS or videos on websites
- Social media - travel bloggers, influencers or others sharing their experiences

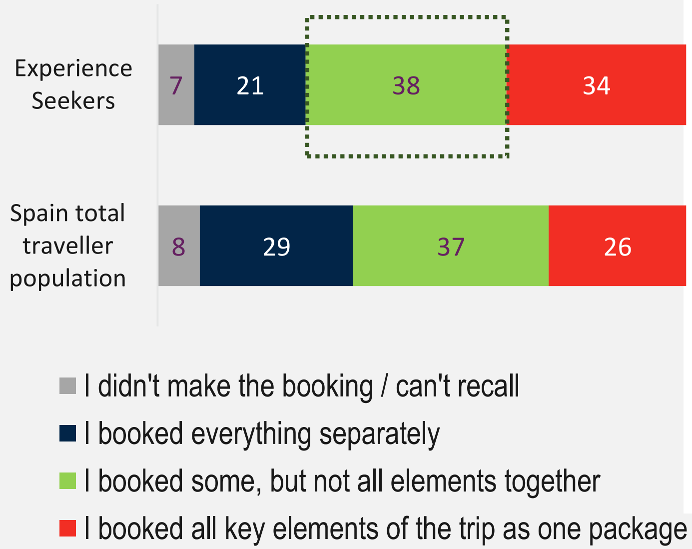
RESOURCES FOR PLANNING:



TOOLS:

54% use more than one resource in the planning/ booking phase of the customer journey which is the same for other tourists from Spain.

PACKAGE VERSUS SEPARATE BOOKINGS:



Booked:	Package		Travel		Accommodation	
Via:	ES	Non	ES	Non	ES	Non
Online mktplace			27%	22%	34%	25%
Price comparison site	20%	13%	30%	23%	26%	20%

**Data show stakeholders which are used more by Experience Seekers compared to other segments in the market.*

UNITED ARAB EMIRATES EXPERIENCE SEEKERS

VISIT BRITAIN

VisitEngland

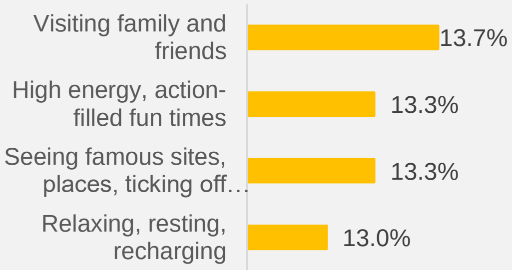
UAE EXPERIENCE SEEKERS (47%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Propensity to travel
(vs UAE total traveller population)

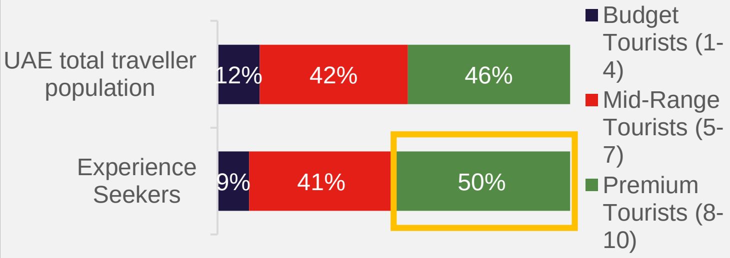
Britain	8.1 (vs 7.9)
Anywhere internationally	7.4 (vs 7.2)

Top Holiday Types Preferred (share of preference)



Experience Seekers over-index on potential spend. If we shine the light on the **PRIORITY Experience Seekers** (highlighted), they represent **23%** of UAE tourists, and are a unique sub-segment with a slight bias to **25-34 yrs**, **males** and interested in **new tourism trends particularly inclusion and sustainability**.

Likely spend on 10-point scale, where 10 = super premium and 1 = super budget



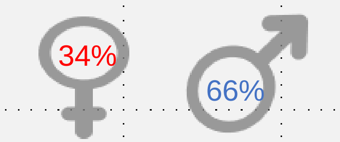
Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved **24% (+7%)**

Sustainability engaged **43% (+12%**

Inclusion seekers **48% (+14%)**

GENDER



SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Recommendations by friends & family on social media **54%**	Travel bloggers, influencers **50%**
Recommendations or connections with friends & family **50%**	National Tourist Board Websites **42%**

64% of GB visitors went beyond England (vs **65%** UAE other tourists); and **90%** beyond London (vs **89%** UAE other tourists)

2 out of 3 travel with their partner/ spouse, but 40% travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE:

- Is a welcoming place to visit (93%)
- Offers lots of different experiences in one destination (91%)
- Is good for relaxing, resting, recharging (91%)
- Offers good value for money (91%)
- I can roam around visiting many types of places (90%)

KEY PERCEPTIONS OF BRITAIN:

- Is a welcoming place to visit (56%)
- There is beautiful coast and countryside to explore (56%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (55%)
- Is a place where I can explore history and heritage (55%)
- Is a mixture of old and new (54%)

TOP ACTIVITIY PREFERENCES:

- Visit famous/iconic tourist attractions and places (79%)
- Visit famous shops or shopping streets/centres (78%)
- Explore local food and beverage specialties (78%)
- Participate in action and adventure experiences (78%)
- Experience city life (76%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

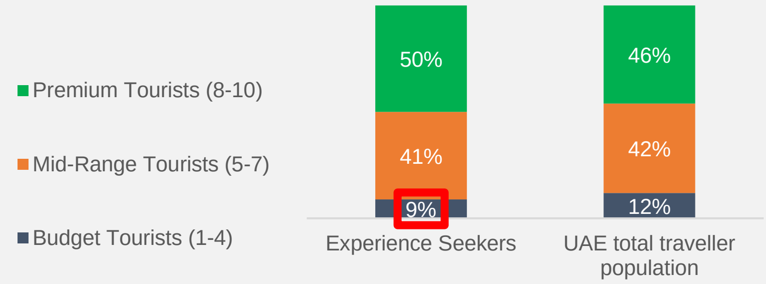
Switzerland	Italy	Spain	USA	France
(64%)	(62%)	(60%)	(59%)	(58%)

Base size: Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies

UAE EXPERIENCE SEEKERS (47%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **14% (+3%)**

Sustainability engaged **37% (+6%)**

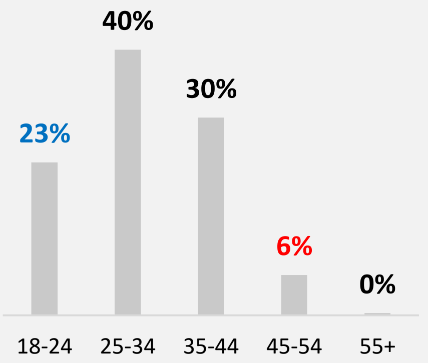
Inclusion seekers **40% (+7%)**

LIVING

46% (-1%) have kids, the split is between kids <12 and 12yrs+ is 68% and 32% respectively

AGE

*Modal age: 32yrs
Median age: 36yrs



*Age with the highest frequency

VISITORS (vs total)

Britain Visitors (P5yrs) **44% (+1%)**

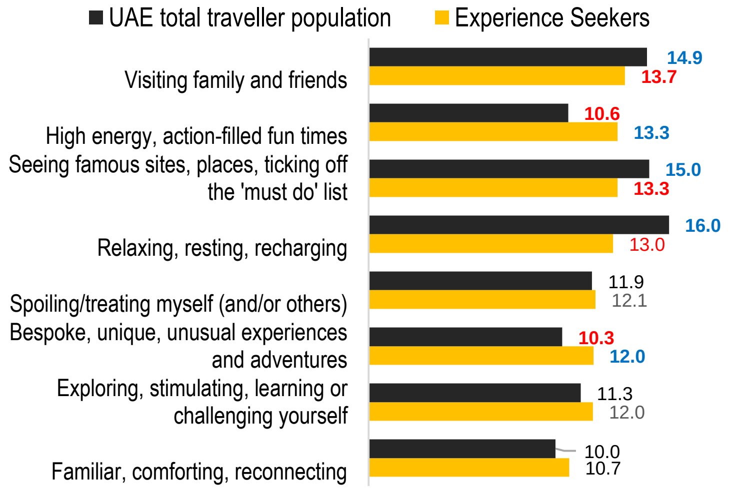
Considerers (P5yrs) **56% (-1%)**

GENDER

39%

60%

TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

National tourist board	Recommendations from friends and family	Online travel agents/ websites	Billboards, posters, or outdoor advertising
6%	5%	5%	4%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- A good place for treating myself, e.g. Priority brands, gourmet food, etc (85%)
- There are interesting local people to meet (86%)
- Is a welcoming place to visit (93%)
- Offers experiences I want to share on social media (84%)
- If I don't visit soon, I'd miss out (81%)
- Has a thriving arts and contemporary culture scene (86%)

2 out of 3 travel with their partner/ spouse, but 40% travel with kids (multiple response data)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers a lot of different experiences in one destination (52%)
- Is good to visit at any time of year (45%)
- If I don't visit soon, I'd miss out (43%)
- There is a good variety of food and drink to try (52%)
- It's easy to get to (46%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (78%)
- Experience city life (76%)
- Visit famous shops or shopping streets/centres (78%)
- Attend a live music festival/event (67%)
- Visit literary, music, film and TV locations (63%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs UAE total)

Disproportionately more likely to consider…

AUSTRALIA	SWITZERLAND	SPAIN	USA	Ireland
(+6%)	(+5%)	(+5%)	(+5%)	(+5%)

Base size: Experience Seekers n=310; Total n=662

UAE: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

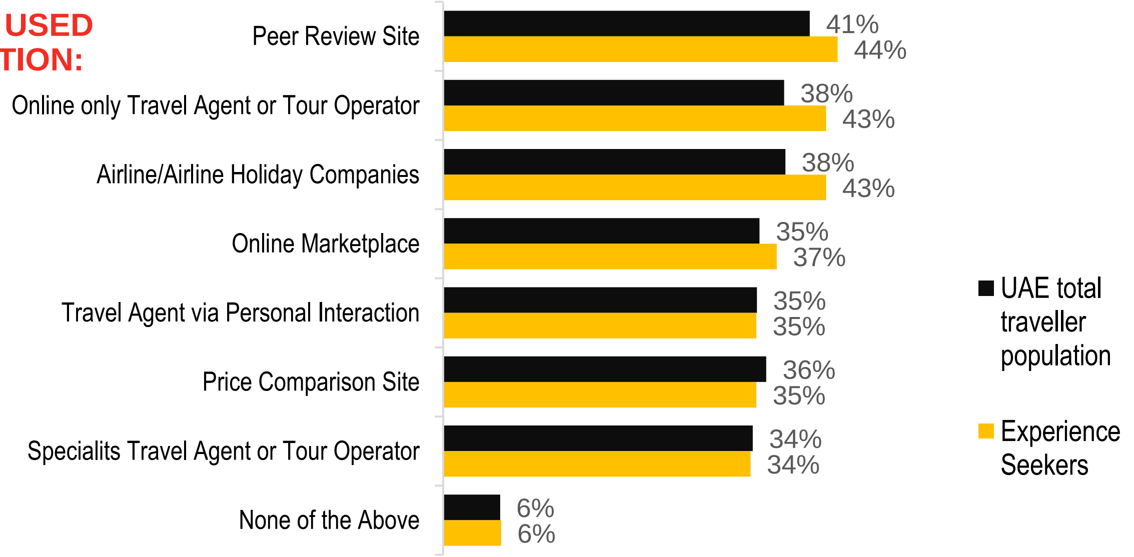
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators.

The majority are using multiple resources in the booking phase, with half (52%) using 3 or more sources in this final phase of the journey.

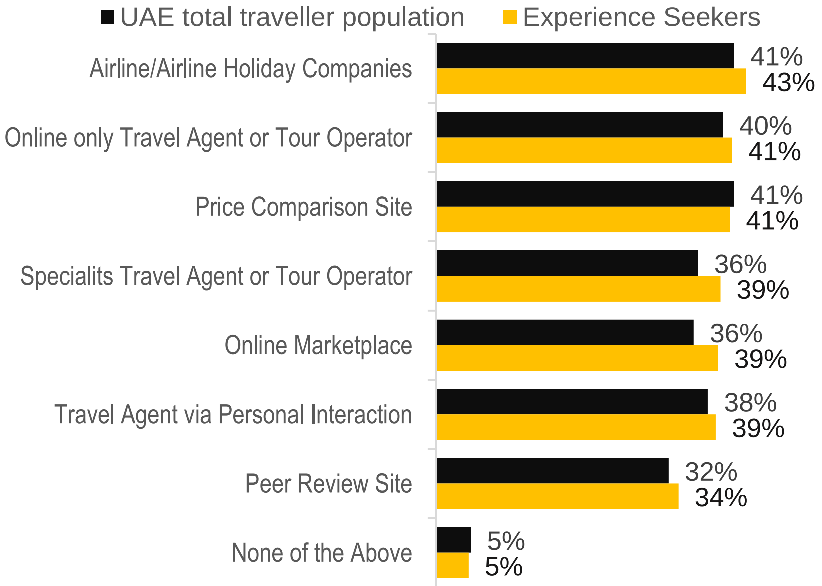
Despite their apparent independence, 40% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Travel agents.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 80% use personal interactions with travel agents throughout their journey, and roughly half of these (39%) use them in the booking phase.

RESOURCES USED FOR INSPIRATION:



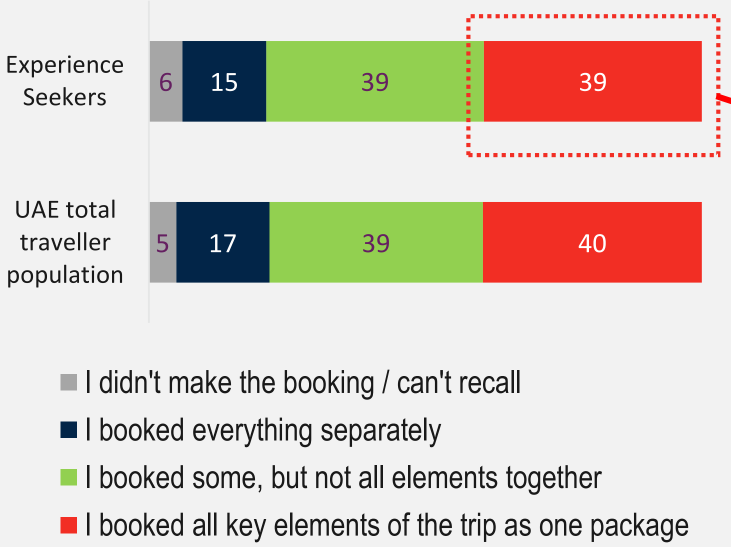
RESOURCES FOR PLANNING:



TOOLS:

77% use more than one resource in the planning/ booking phase of the customer journey vs **69%** other tourists from UAE

PACKAGE VERSUS SEPARATE BOOKINGS:



PACKAGE BOOKINGS:

Travel agent who offers advice through personal interaction more likely to be used to make package bookings (**18%**) versus other tourists from UAE(**13%**)

80% use travel agents IN PERSON throughout the customer journey vs 79% for other tourists from UAE

USA EXPERIENCE SEEKERS

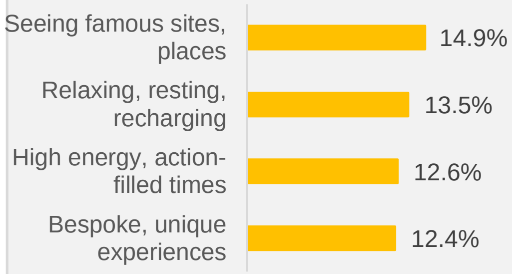
USA EXPERIENCE SEEKERS (41%)

Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people..

Propensity to travel (vs USA total traveller population)

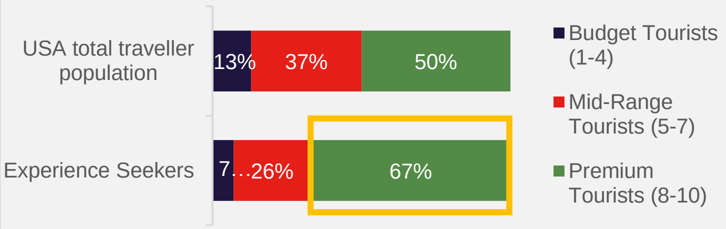
Britain	8.1 (vs 7.5)
Anywhere internationally	7.6 (vs 6.8)

Top Holiday Types Preferred (share of preference)



Experience Seekers over-index on potential spend. If we shine the light on the **PRIORITY Experience Seekers** (highlighted), they represent **28%** of US tourists, and a unique sub-segment which over-index on being **male, 35-44 yrs** and are trend endorsers particularly driven by **sustainability**.

Likely spend on 10-point scale, where 10 = super premium and 1 = super budget



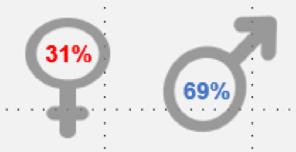
PRIORITY Experience Seekers are trend endorsers (vs total):

Wellbeing involved **33% (+10%)**

Sustainability engaged **50% (+20%)**

Inclusion seekers **45% (+11%)**

GENDER



SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Travel websites or web pages **41%**	Recommendations by friends & family on social media **40%**
Travel bloggers, influencers **39%**	Recommendations or connections with friends & family **35%**

52% of GB visitors went beyond England (vs **56%** USA other tourists); and **79%** beyond London (vs **79%** USA other tourists)

More than 2/3 travel with their partner/ spouse; almost **half of them** travel with kids (multiple response data)

TOP DRIVERS OF DESTINATION CHOICE*:

- Is a welcoming place to visit (76%)
- Offers a lot of different experiences in one destination (75%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (75%)
- There is beautiful coast and countryside to explore (74%)
- It has surprising and unexpected experiences (73%)

KEY PERCEPTIONS OF BRITAIN:

- Is inclusive and accessible for visitors like me (55%)
- Offers a lot of different experiences in one destination (55%)
- Is a place where I can explore history and heritage (55%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (55%)
- There are vibrant towns and cities to explore (54%)

TOP ACTIVITIY PREFERENCES:

- Visit famous/iconic tourist attractions and places (81%)
- Explore local food and beverage specialties (81%)
- Experience coastal places and scenery (81%)
- Explore history and heritage (historical sites, architecture) (79%)
- Experience city life (78%)

TOP DESTINATIONS LIKELY TO VISIT (Excl. Britain)

Likely to consider…

France	Italy	Australia	Germany	Spain
(68%)	(67%)	(62%)	(61%)	(61%)

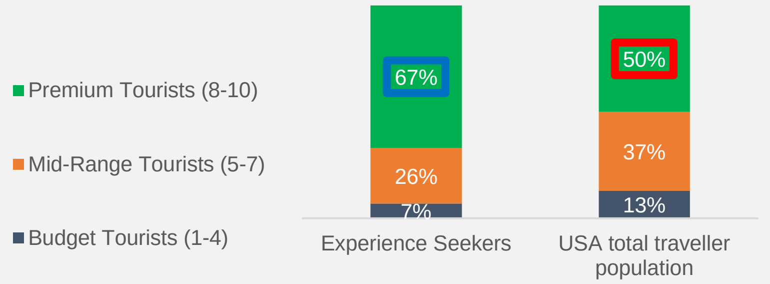
Base size: Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies

* Tox 2 Box

USA EXPERIENCE SEEKERS (41%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget



TREND ENDORSERS (vs total)

Wellbeing involved **28% (+5%)**

Sustainability engaged **39% (+9%)**

Inclusion seekers **39% (+5%)**

LIVING

58% (+14%) have kids, and the split is between kids <12 and 12yrs+ is 38% and 62%

ETHNICITY (USA)

77% White

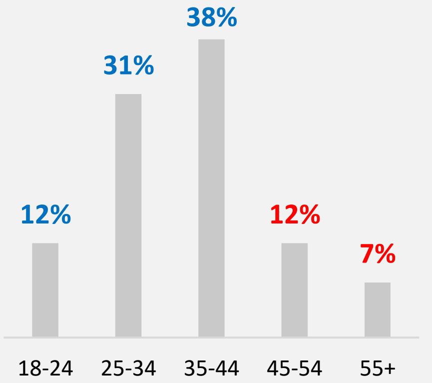
8% Black

7% Latinx

3% Asian

AGE

***Modal age: 35yrs**
Median age: 35yrs



**Age with the highest frequency*

VISITORS (vs USA total)

Britain Visitors (P5yrs) **54% (+8%)**

Considerers (P5yrs) **46% (-8%)**

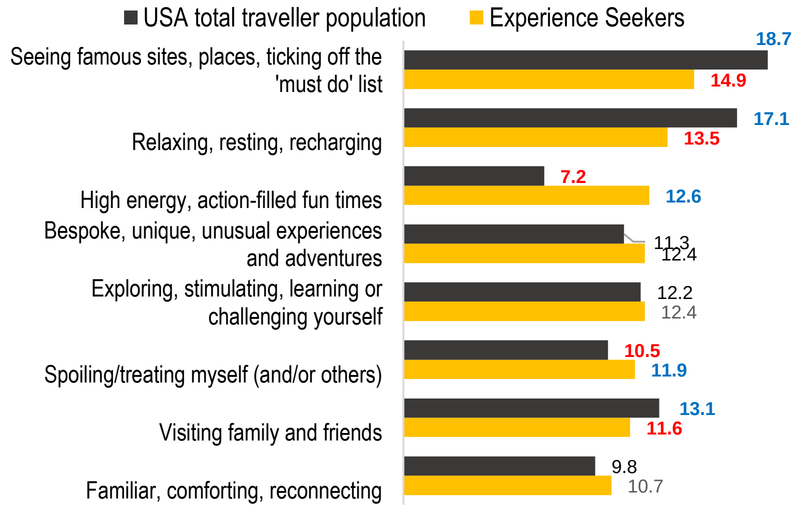
Identified as LGBTQ+ **17% (+2%)**

GENDER

35%

65%

TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

Recommendations or connections with friends & family	Travel bloggers, influencers	Music, concerts, tours	Kids' TV, movies or from friends at school
10%	10%	7%	7%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences to share on social media (80%)
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (85%)
- It offers the opportunity to travel sustainably/responsibly (85%)
- Has a thriving arts and contemporary culture scene (84%)
- A place recommended by family & friends (84%)
- If I don't visit soon, I'd miss out (76%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- If I don't visit soon, I'd miss out (41%)
- Is good to visit at any time of year (51%)
- Offers the opportunity to travel sustainably (49%)
- Offers experiences I want to share on social media (48%)
- Offers good value for money (47%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (75%)
- Attend a sporting event (67%)
- Participate in wellness activities (65%)
- Participate in sports (63%)
- Volunteering (57%)
- Visit literary, music, film and TV locations (68%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs USA total)

Disproportionately more likely to consider…

GERMANY	FRANCE	GREECE	AUSTRALIA	SPAIN
(+14%)	(+14%)	(+14%)	(+14%)	(+10%)

Base size: Experience Seekers n=652; Total n=1,576

VISIT BRITAIN VisitEngland

USA: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

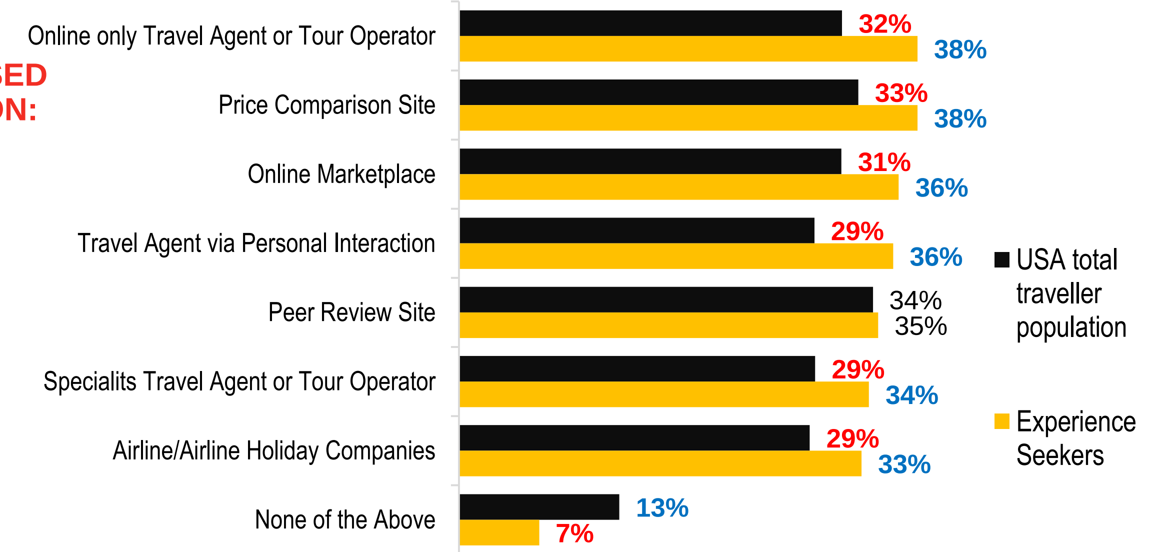
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators.

The majority are using multiple resources in the booking phase, with 40% using 3 or more sources in this final phase of the journey.

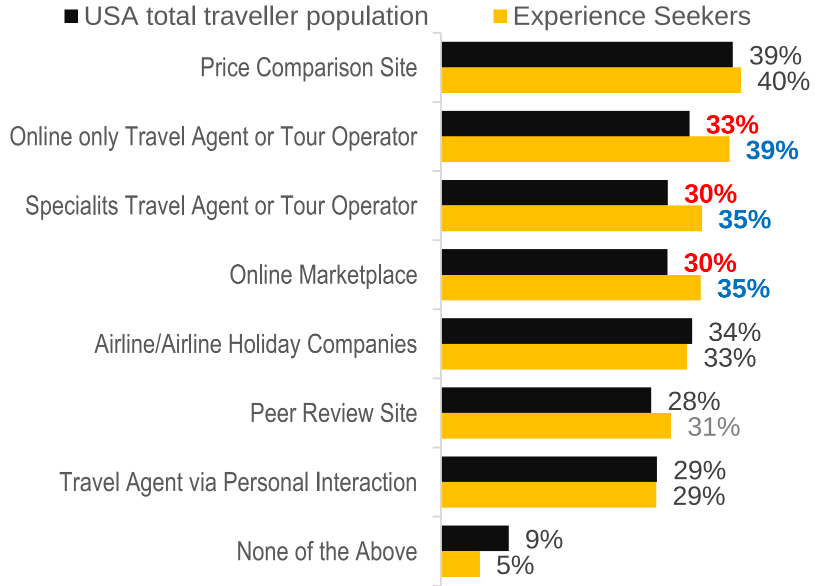
Despite their apparent independence, 55% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Price comparison sites.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 65% use personal interactions with travel agents throughout their journey, and roughly half of these (29%) use them in the booking phase.

RESOURCES USED FOR INSPIRATION:



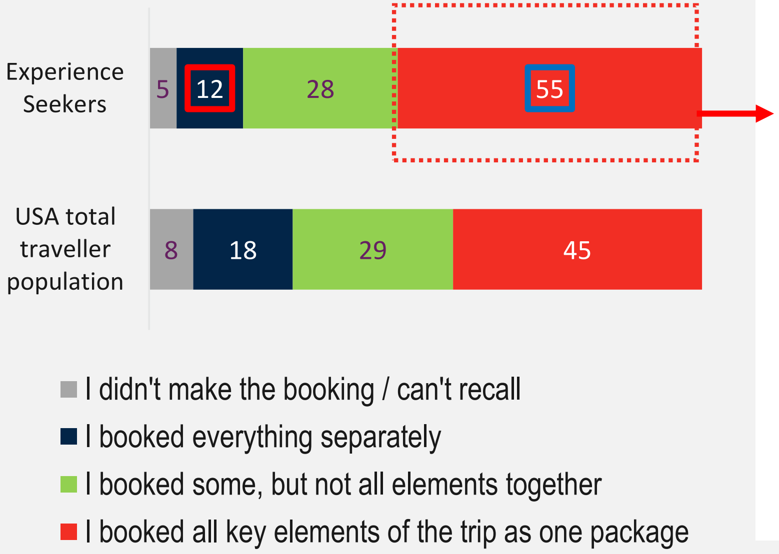
RESOURCES FOR PLANNING:



TOOLS:

72% use more than one resource in the planning/ booking phase of the customer journey vs **60%** other tourists from USA

PACKAGE VERSUS SEPARATE BOOKINGS:



PACKAGE BOOKINGS:

Price comparison sites more likely to be used to make package bookings (**20%**) versus non Experience Seekers (**15%**)

65% use travel agents IN PERSON throughout the customer journey vs **54%** for other tourists from USA

I2 , Resources used; Experience Seekers n=6,677; total N=22,840

APPENDIX: HOW TO READ THE PEN PORTRAITS

VISIT BRITAIN

VisitEngland

HOW TO READ THE PEN PORTRAITS

Pen portraits have been developed for the Experience Seeker segment and, additionally, the Priority Experience Seeker segment which is the higher-spending sub-segment of Experience Seekers.

The purpose of a pen-portrait is to give a very quick snapshot summary of some key indicators which help identify the target tourist. Each pen portrait has three pages.

The first page indicates key demographics, holiday motivations, desires and behaviours. The second focusses on elements of the customer journey to inform how and where we can engage with them.

*The Experience Seeker, or Priority Experience Seeker data is generally compared with *either*: (a) the total tourist population, or (b) all tourists who are not Experience Seekers (or Priority Experience Seekers as the case may be).

Both approaches highlight how the segment is **unique** and **distinctive.**

We typically use blue numbers to highlight data that is significantly higher from the comparative audience and red numbers are significantly lower. The colour coding is intended to help instant navigation towards what is most distinctive.

We also list the most distinctive drivers, perceptions of Britain and activities. These are listed in descending order, so the top statement in each section will be the single biggest difference between the segment and those not in the segment, even if it isn't the largest in absolute terms.

**European respondents tend to give lower scores due to cultural differences and proximity with Britain*

EXAMPLE

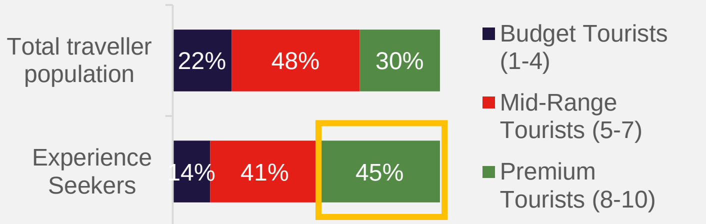
Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Provides an overview summarising the segment, what defines them as an international tourist and how to connect with them.

Experience Seekers over-index on potential spend. If we shine the light on the **PRIORITY Experience Seekers** (highlighted), they represent **13%** of global tourists, but a unique sub-segment which over-index on being **younger**, **male** and interested in new tourism trends.

Introduces a key sub-segment of interest – the higher-spending Experience Seekers, including snapshot of their size and unique profile
(blue = significantly higher than total population)

Likely spend on 10-point scale, where 10 = super premium and 1 = super budget



The data from which the sub-segment of Priority Experience Seekers are identified (highlighted by the gold box)

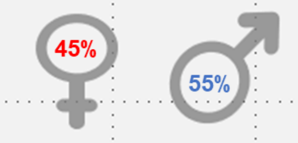
PRIORITY Experience Seekers are trend endorsers (vs total):

Wellbeing involved **23% (+8%)**

Sustainability engaged **40% (+19%)**

Inclusion seekers **40% (+15%)**

GENDER



A quick snapshot to remind us of any key differences which separate Priority Experience Seekers from the norm (total population)

EXAMPLE

Average propensity to travel (average on a 10-point scale where 10 = 'definitely visit') compared to total population. Blue numbers are significantly higher; red lower.

The top kind of holidays preferred by this segment

This show top influences for Experience Seekers overall. The numbers in the boxes indicate the percentage of respondents who selected these options

The top drivers of destination choice, perceptions of Britain and activity preferences (Top 3 box score where asked on a 10-point scale), Perceptions is based on % who associate this statement with Britain

Key facts on travelling generally, as well as to Britain specifically (of visitors who visited in the past 5 years)

The top destinations based on propensity to visit scores (8,9 or 10 on a 10-point scale), but excluding Britain (biased because we only spoke to considerers of Britain)

Propensity to travel (vs Global total)

Britain 7.5 (vs 6.8)

Anywhere internationally 6.4 (vs 5.5)

Top Holiday Types Preferred (share of preference)

Holiday type	Share
Seeing famous sites, places	14.6%
Relaxing, resting, recharging	14.1%
High energy, action-filled times	13.2%
Bespoke, unique experiences	12.5%

SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

Recommendations by friends & family on social media 39%	Recommendations by friends and family 39%
Travel bloggers and influencers 38%	Travel websites or web pages 35%

TOP DRIVERS OF DESTINATION CHOICE:

- Offers good value for money (87%)
- Is a welcoming place to visit (86%)
- I can roam around visiting many types of places (86%)
- Offers a lot of different experiences in one destination (86%)
- It has experiences I can't have anywhere else (85%)

KEY PERCEPTIONS OF BRITAIN:

- Is a place where I can explore history & heritage (52%)
- There are vibrant towns & cities to explore (51%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (51%)
- I can roam around many types of places (50%)

TOP ACTIVITIY PREFERENCES:

- Explore local food & beverage specialties (73%)
- Experience coastal places and scenery (72%)
- Visit famous/iconic tourist attractions and places (70%)
- Experience city life (67%)

48% of GB visitors went beyond England (vs 43% other tourists); and 72% beyond London (vs 65% other tourists)

60% travel with their partner/ spouse, but 31% travel with kids (multiple response data)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

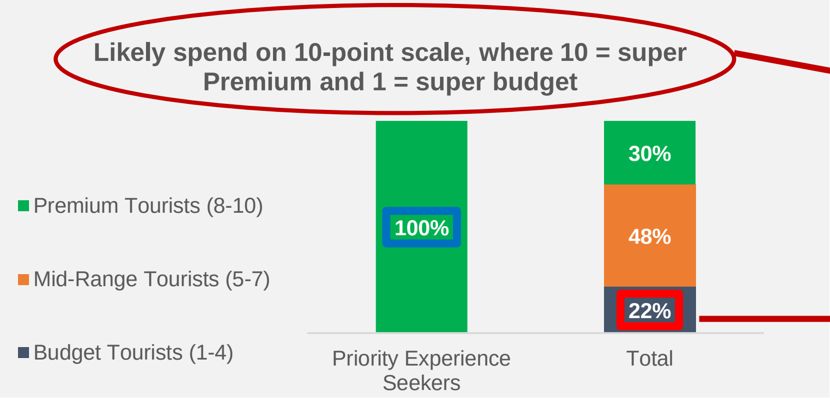
Likely to consider…

Australia	Greece	Italy	France	Spain
(56%)	(56%)	(55%)	(53%)	(53%)

Base size: Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies

EXAMPLE

SPEND POTENTIAL AS VISITOR TO BRITAIN:

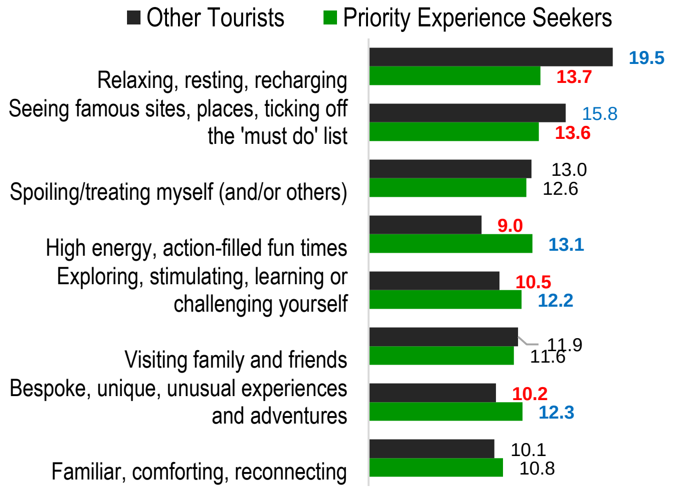


This chart compares the target segment with the total population of tourists based on the question of what type of tourist they would be if visiting Britain.

The title explains the question responses (as does the legend).

Where blue or red font would be too hard to read, we have used blue or red boxes to indicate significantly higher or lower comparative results. In this case, Priority Experience Seekers had to all respond within the top 3 options of the question scale, which explains why 100% of them are premium tourists!

TYPES OF HOLIDAYS:



This chart compares the proportion of holidays generally taken by the target segment compared to those not in that segment. The bigger the difference is in the bar lengths, the more distinctive the segment is – note the use of blue and red numbers to indicate statistically significant differences. The bars are in descending order of size according to the target segment being profiled.

SOURCES OF INSPIRATION (BIGGEST SKEWS):

Kids TV/ movies/ friends	Outdoor Advertising	Music, concerts, tours	Travel bloggers, influencers on social media
13%	13%	12%	11%

A quick snapshot highlighting sources of inspiration that differ most between the target segment and total population in the market. The numbers in the blue boxes indicate the magnitude of difference.

EXAMPLE

These indicators are explained in the full MIDAS report, but essentially look at how involved the target segment is when it comes to choosing holidays which fulfil Wellbeing, Sustainability and Inclusion needs. Sizes within the target segment are compared to total population in the market – e.g. 23% are Wellbeing involved and this number is 8 percentage points higher than the total figure (which would be 15%).

Demographic breakdowns should be self-explanatory – once again, look for blue figures which indicate higher skews relative to total population.

The sample is split by either Britain Visitors (have visited in Past 5 Years), or considerers (have not visited Britain in past 5 years, but would consider doing so in next 2 years). As a result, the figures will add to 100%. Data is compared vs total tourist population in the market.

These three sections (drivers, Britain perceptions, activities) illustrate the largest differences vs those not in the target segment in descending order. Absolute percentages are also shown (drivers and activities Top 3 box importance), perceptions are the % believing this statement describes Britain.

Some simple stats and figures on who they travel with is included.

And the countries where the segment has a disproportionately higher propensity to visit (Top 3 box score on a 10-point scale) is shown here alongside the magnitude of the difference versus total population in the market.

The relevant base sizes are indicated at the bottom of the page. Where global weighting is applied, this is explained in the full report, but is based on approximate value contributions from the inbound markets (sourced from IPS data)

TREND ENDORSERS (vs total)

Wellbeing involved **23% (+8%)**

Sustainability engaged **40% (+19%)**

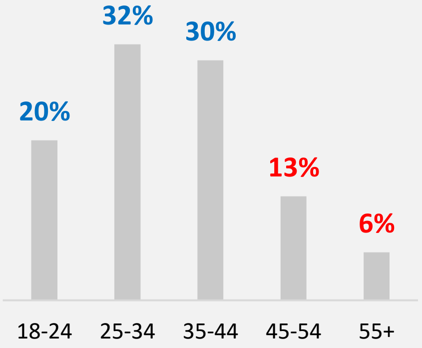
Inclusion seekers **40% (+15%)**

LIVING

46% have kids, and this is split evenly between kids <12 (50%) and 12yrs+ (50%)

AGE

*Modal age: 34yrs
Median age: 36yrs



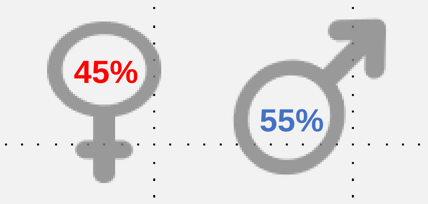
*Age with the highest frequency

VISITORS (vs total)

Britain Visitors (P5yrs) **47% (+9%)**

Considerers (2yrs) **53% (-9%)**

GENDER



MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences to share on social media (87%)
- A good place for treating myself (90%)
- If I don't visit soon, I'll miss out (83%)
- Has a thriving arts and contemporary culture scene (87%)
- A place recommended by family & friends (86%)
- Offers the opportunity to travel sustainably (88%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- If I don't visit soon, I'd miss out (41%)
- Offers good value for money (43%)
- Offers the opportunity to travel sustainably (46%)
- A good place for treating myself (47%)
- A good place for recharging (45%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in sport (66%)
- Participate in action and adventure experiences (79%)
- Attend a sporting event (71%)
- Attend a learning course (66%)
- Volunteering (60%)
- Participate in wellness activities (67%)

2 in 3 travel with their partner/ spouse, but 1 in 3 travel with kids (multiple response data)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs global total)

Disproportionately more likely to consider…

CANADA	CROATIA	INDIA	USA	CHINA
(+39%)	(+36%)	(+34%)	(+31%)	(+30%)

Base size: Priority Experience Seekers n=3,004; Total Tier 1 n=5,893; global weighting applies

EXAMPLE

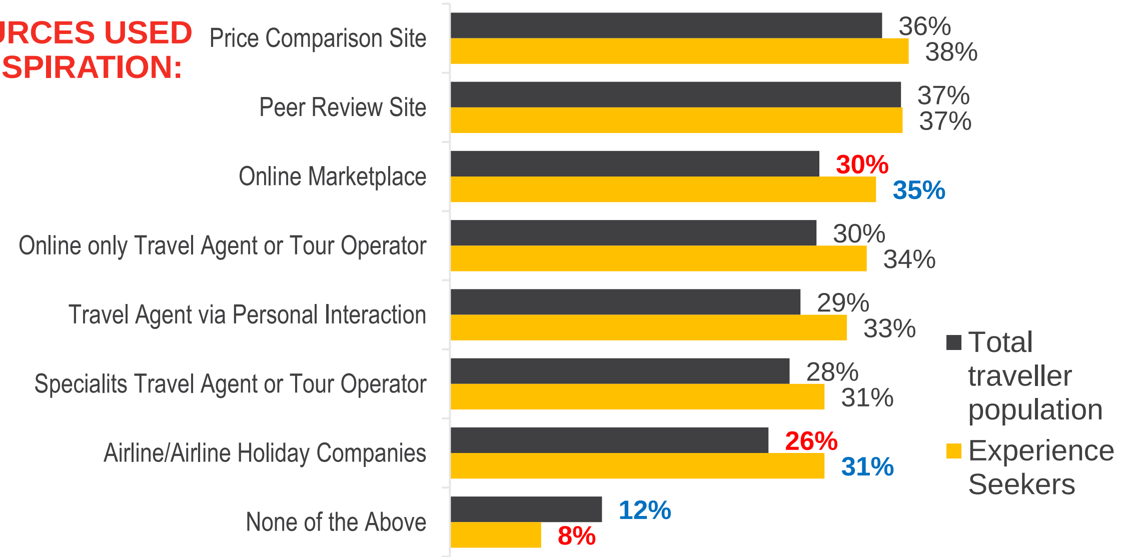
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators.

The majority are using multiple resources in the booking phase, with one in 3 (35%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 37% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Online Market Places.

Don't be fooled into thinking Experience Seekers are digital-only customers however – 65% use personal interactions with travel agents throughout their journey, and roughly half of these (30%) use them in the booking phase.

RESOURCES USED FOR INSPIRATION:



A short summary of the segment learnings as they apply to the customer journey is captured here.

And the abridged list of resources (which was repeated for the planning & booking phase) is shown here, with the incidence of the segment using each resource compared to the total tourist population.

These are sorted in descending order by target segment usage. Red and blue indicators are used to highlight differences.

EXAMPLE

The same set of tools and resources are shown when it comes to those used for planning and booking.

Once again, they are shown in descending incidence of the target segment.

We illustrate the number of tools used in the key planning & booking phase and compare this to those tourists NOT in the target segment.

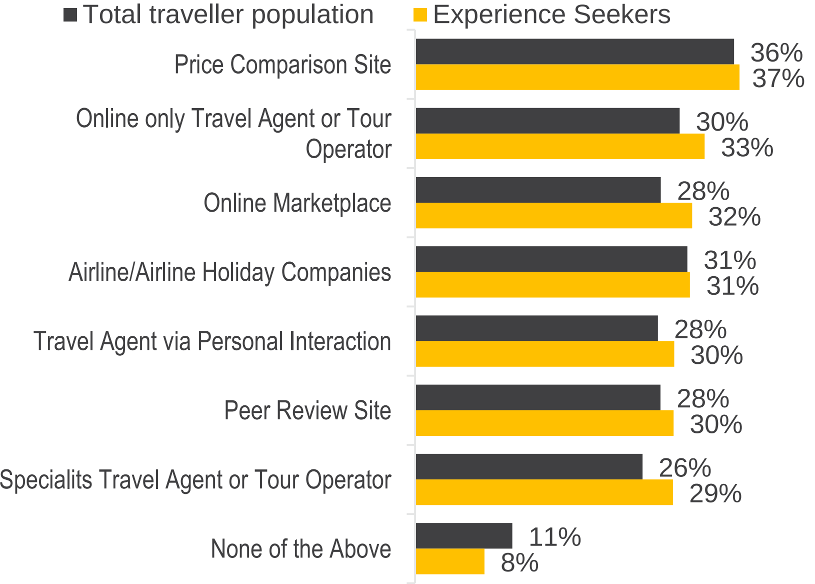
WE asked about independent or package bookings, comparing the target segment with the total tourist population.

Blue and red boxes are used where font colours would be difficult to see (only on one bar so as not to be cluttered)

The first statistic comes from the base indicated by the dotted red box – i.e. only those who said they booked all elements as one package were then asked HOW they made the booking.

Separately, we indicate what proportion of the segment use in-person travel agents, as the high proportion was found to be quite surprising.

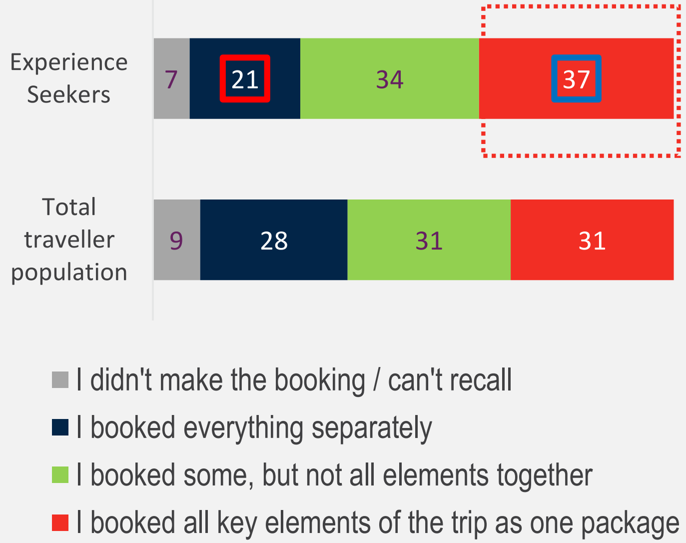
RESOURCES FOR PLANNING:



TOOLS:

63% use more than one resource in the planning/ booking phase of the customer journey vs **55%** other tourists

PACKAGE VERSUS SEPARATE BOOKINGS:



PACKAGE BOOKINGS:

Online market places more likely to be used to make package bookings (**15%**) versus other tourists (**10%**)

65% use travel agents IN PERSON throughout the customer journey vs 55% for other tourists

I2 , Resources used; Experience Seekers n=6,677; total N=22,840