MIDAS: A Global Report

Motivations, Influences, Decisions and Sustainability in a Post-Pandemic Era

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Image: Visit Britain / Nemorin

Welcome to MIDAS

A FOUNDATIONAL STUDY ON INTERNATIONAL TOURIST MOTIVATIONS, DECISION-MAKING & SUSTAINABILITY

The purpose of this study is to explore the population of international leisure travellers in a post-pandemic environment in order to inform how best to inspire, convert and delight them – each of these elements driving accretive economic benefit to Britain via its tourism offering.

This is a more in-depth analysis of the results of the study than the previously published report.

We spoke to global tourists/prospective tourists in the following markets: Australia, Austria, Belgium, Brazil, Canada, China, Denmark, France, Germany, Hong Kong, India, Ireland, Israel, Italy, Japan, Netherlands, New Zealand, Norway, Poland, Saudi Arabia, South Korea, Spain, Sweden, Switzerland, South-East Asia (Malaysia, Singapore, Thailand), UAE, USA. Full sample sizes are shown here by Britain Considerers and Britain Visitors.

Fieldwork took place between 18th March and 23rd April 2022.

Country	Considerers	Visitors	Total
Australia	653	383	1,036
Austria	451	203	654
Belgium	398	263	661
Brazil	840	251	1,091
Canada	673	329	1,002
China	658	345	1,003
Denmark	369	239	608
France	661	342	1,003
Germany	702	302	1,004
Hong Kong	391	261	652
India	580	446	1,026
Irish Republic	184	513	697
Israel	382	234	616
Italy	715	285	1,000

Country	Considerers	Visitors	Total
Japan	698	304	1,002
Netherlands	373	274	647
New Zealand	421	252	673
Norway	369	250	619
Poland	404	259	663
Saudi Arabia	369	278	647
SEA*	737	298	1,035
South Korea	686	316	1,002
Spain	617	384	1,001
Sweden	367	259	626
Switzerland	412	222	634
UAE	378	284	662
USA	855	721	1,576
TOTAL	**14,343**	**8,497**	**22,840**

Note:* South-East Asia (SEA) is comprised of equally-weighted samples from Malaysia, Singapore and Thailand

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Image: Buttermere; Cumbria; England; VisitBritain/Ryan Lomas

01 Setting the scene

Purpose, methodology, sampling details, how to navigate the report

The sample, fieldwork and timing

All international leisure travellers, defined as:

- Having travelled outside their immediate region[1] in the past 5 years or planning to do so within 2 years of post-COVID travel restrictions lifting
- Non-rejectors of Britain as a tourism destination
- Qualifying via holding or intending to hold a passport within next 2 years except for European tourists. As the requirement to hold a passport for European visitors only became mandatory in 2021, we wanted to ensure we captures the opinion of travellers who may still be able to obtain one, but may be unaware of the change

A mix of general population international tourists (selected via random, nationally representative sampling) and a boost to achieve a minimum of N=200 visitors (having visited Britain in the past 5 years. Bases for each sub-sample illustrated on page 2).

Fieldwork was completed via online surveys (20minutes) translated into local languages.

Data cleansing used to remove duplicates, speeders and flatliners.

Fieldwork took place between 18th March and 23rd April (93% complete by end of March, 7% into April).

IMPORTANT IMPLICATIONS REGARDING OUR SAMPLE

As all respondents were either Considerers or Visitors of Britain, sentiment towards Britain is naturally perceived more warmly than a representative sample of all international travellers.
Footnotes are included where specific analysis is applied to mitigate this positivity impact.

Definition of regions used throughout the report and application of different sample types

The following regions are used throughout the report:

SHORT HAUL REGIONS				LONG HAUL REGIONS						
Central Europe	**Northern Europe**	**Southern Europe**	**Western Europe**	**North America**	**South America**	**North-East Asia**	**South Asia**	**South-East Asia**	**Oceania**	**Middle East**
Austria	Denmark	Italy	Belgium	Canada	Brazil	China	India	Singapore	Australia	Saudi Arabia
Germany	Norway	Spain	France	USA		Hong Kong		Malaysia	New Zealand	UAE
Poland	Sweden		Ireland			Japan		Thailand		Israel
Switzerland			Netherlands			South Korea				

Sampling involved both a **general population sampling component** (96% of total sample), as well as a **boost sample** (4%) which was used to achieve minimum base sizes required to explore recent visitors to Great Britain (minimum sample of N=200 per market).

In most cases, we have reported based on total population (i.e. Considerers and Visitors combined). Exceptions to this are when we look at Consideration and Propensity to Visit – two indictors which are most prominently impacted by recent visitors (particularly long-haul visitors). Footnotes indicate which sample base was used in each case.

Note on weighting to inform global totals and regional nets

The sample is not representative of, or weighted to the international tourist population, but, instead, represents a sample from various markets around the world.

Sample sizes vary by market based both on the relative size and importance of that market to inbound British tourism, but also on the sampling feasibility via global online research panels. As a result, raw data does not accurately represent the population of international tourist prospects, so a global and regional weighting was developed which is based on the **indexed value contribution from the International Passenger Survey (IPS)** of each inbound market included in the study (where South-East Asia or the combination of Thailand, Singapore and Malaysia is considered a single market).

The indices do not reflect the exact value contribution of each market, as this would result in the findings being dominated by patterns which might be isolated to the USA which represents almost 20% of inbound visitor spend.

The exact weighting contribution agreed to is shown here.

No further weights have been applied, as the sampling was demographically representative in each market.

Country	Indexed Share
Australia	4.34%
Austria	2.38%
Belgium	3.48%
Brazil	3.07%
Canada	4.00%
China	4.46%
Denmark	3.19%
France	4.40%
Germany	4.52%
Hong Kong	3.82%
India	3.71%
Irish Republic	4.11%
Israel	2.73%
Italy	4.17%
Japan	3.13%
Netherlands	3.94%
New Zealand	3.02%
Norway	3.54%
Poland	3.42%
Saudi Arabia	4.05%
SEA	3.11%
South Korea	2.96%
Spain	4.28%
Sweden	3.59%
Switzerland	3.77%
United Arab Emirates	4.23%
USA	4.57%
TOTAL	**100.00%**

A note on time-based comparisons and commentary

A similar study to this was conducted back in 2016 (Decisions & Influences) which included 20 countries.

Given the fundamental changes in the context of international tourism as a result of the global COVID-19 pandemic, it was deemed more vital to focus on foundational insight to inform the future context, than focus on direct comparisons to 2016 data.

As a result, the questionnaire design for 2022 was developed largely independently (as opposed to replicating identical questions and questionnaire structure to allow for direct comparability).

Given this, direct comparison with prior data is not always possible, however, where it is available, data analysis and/or commentary will be illustrated.

An overview of VisitBritain's global tourism segmentation

VisitBritain has a global segmentation which reflects different types of tourists internationally.

The segmentation was primarily driven to validate existing knowledge and understanding of different types of tourists and is mainly based around psychographic differences, particularly as they apply to travel preferences. For instance, by asking people to choose between the following two statements: "I prefer holidays full of action and excitement" and "I prefer holidays at a slower and more relaxed pace", (they are required to select one or the other), we ascertain whether that individual is more oriented towards high energy leisure breaks and holidays, or those at a more chilled tempo.

A total of 6 paired statements and age are combined to assign tourists to a segment. This was deemed the best possible (most efficient, actionable and robust) approach.

The five segments and their sizes from this study are shown here, with a brief description of each.

Adventurers (21%) like to be away from the crowds and spotlight – they are comfortable with being more intrepid, mature-aged travellers.

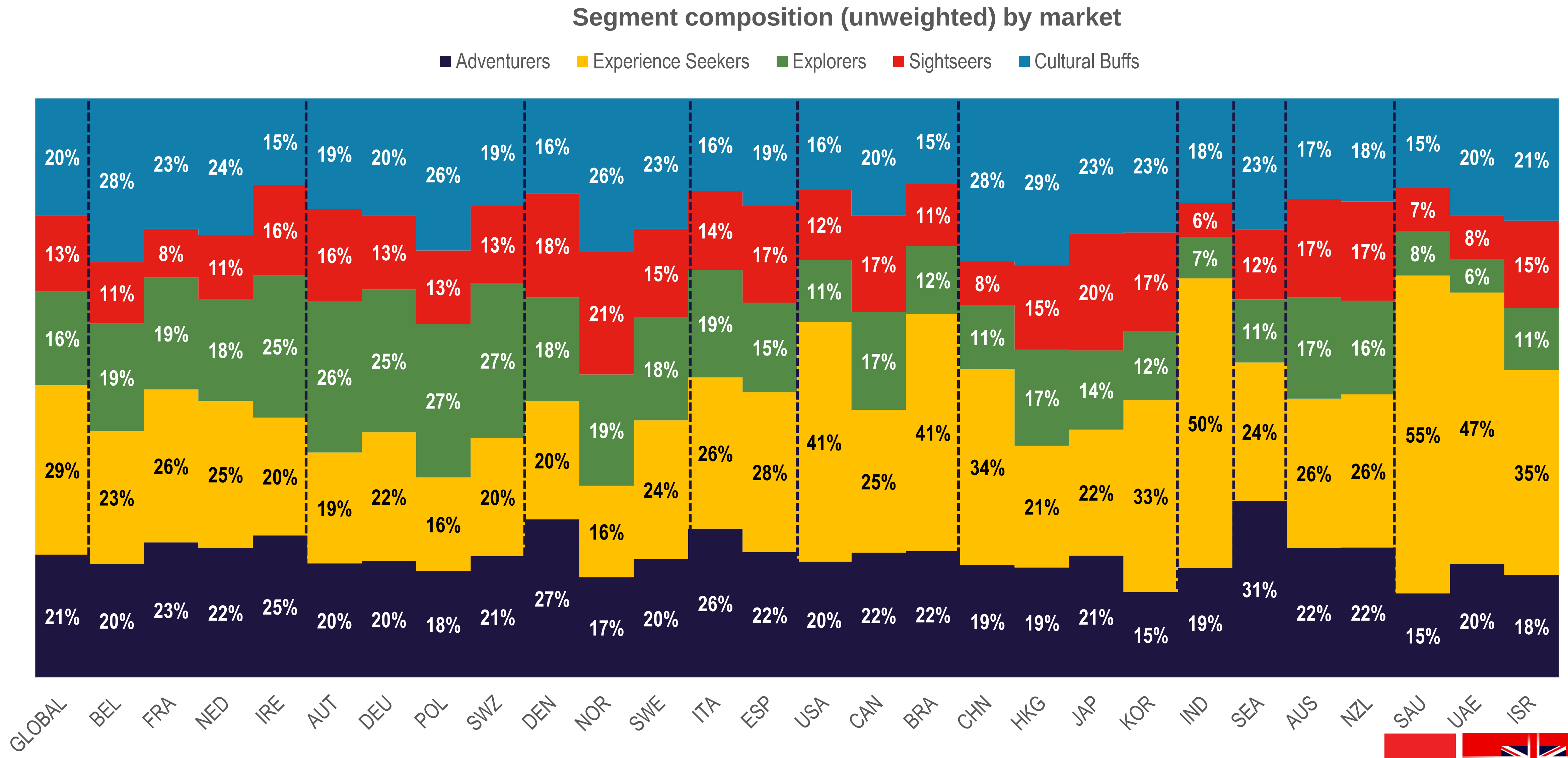
Experience Seekers (29%) tend to be younger, free spirited and spontaneous, fueled by a desire to do as much as they can and grow as individuals.

Explorers (16%) have no need for social image – they are authentic and enjoy nature, peace, local experiences and relaxation when travelling.

Sightseers (13%) prefer to visit the well-known places in city locations that are safe and can be well planned with certainty and assurance.

Culture Buffs (21%) are brand and image conscious – concerned with how others see them, travel can provide the kudos of status for this segment.

The distribution of the segments varies by market



02 Appetite for international travel; Appetite for Britain

Who is considering Britain as a destination?

As a reminder, the survey was only asked of those who were either recent **Britain Visitors** (past 5 years), or **Britain Considerers** (would consider visiting Britain in the next 5 years).

In order to obtain a valid read of the level of consideration in comparison to other destinations, we need a base which includes those subsequently screened out of our survey as non-considerers.

This full base (N=36,633) including screen-outs is only used for analysis of Consideration and Non-Consideration shown on the following pages.

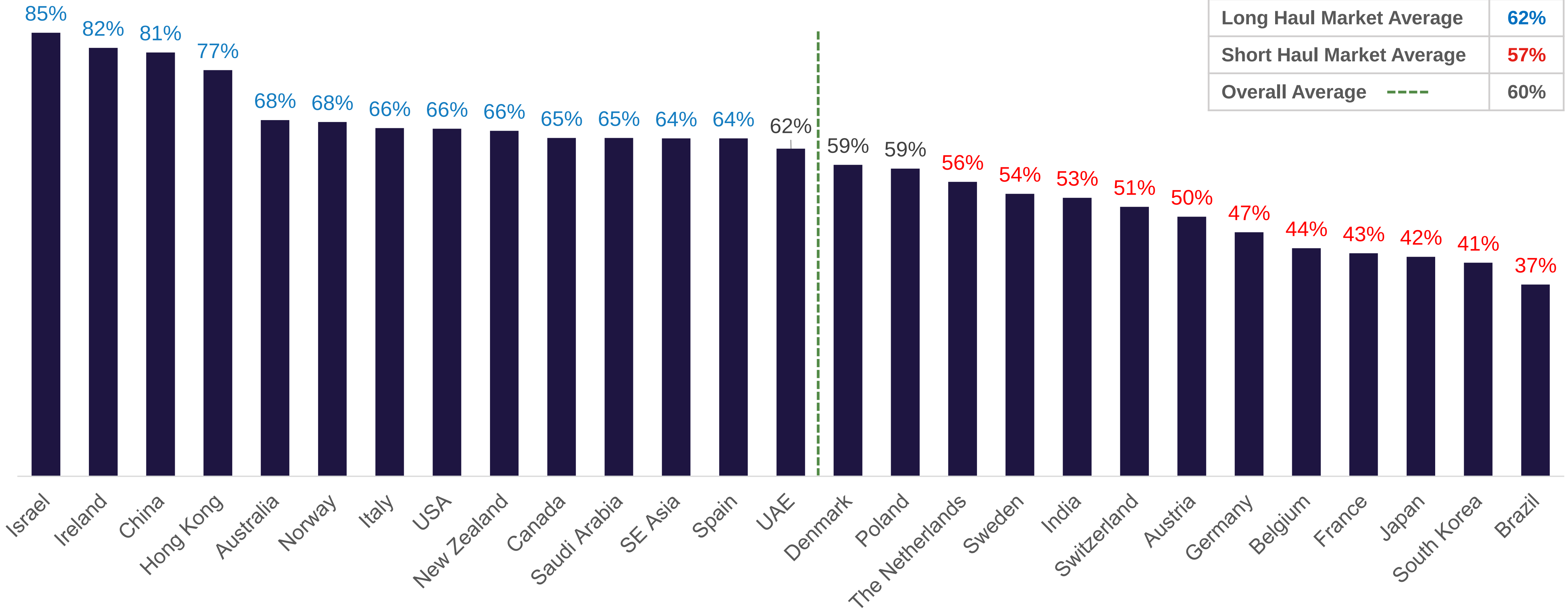
Important Note: as non-considerers/ visitors were screened out prior to the segmentation questions; we cannot run the same Consideration analysis (page 12) by segment.
Non-Consideration generally increases with age in a post-pandemic environment, so our resultant sample tends to be under 55yrs

Image: Edinburgh; Midlothian; Scotland; VisitBritain/Moumita Paul

Consideration for Britain is particularly strong within Israel, Ireland, China and Hong Kong

Consider taking a break or holiday in Britain in the next 5 years

Long Haul Market Average	62%
Short Haul Market Average	57%
Overall Average ----	60%



C4: And which of these countries would you consider taking a break or holiday in within the next 5 years?
BASE is the total sample (general population excluding boost) plus those screened out as non-considerers after this question; N=36,633;
Blue numbers are significantly higher than the average @95%; red numbers significantly lower @95%

Reasons for non-consideration are mainly driven by tourists having already visited, but current events are also a strong deterrent

Previously travelled in Britain

"Because I've already been there and visited the things I wanted to do"
Sweden

Because I've been there, I want to visit other places
Brazil

"I have visited Britain more often than any of the other countries"
USA

"I've been there many times"
Japan

"Been twice. Would rather see other places"
Austria

"Have other destinations I intend on visiting first and family in other regions"
New Zealand

"I want to explore a new country for a leisure break"
India

"I prioritize visiting countries that I do not yet know"
Italy

Brexit, Politics, Unwelcoming

"Brexit, they just don't want me anymore"
Germany

"Brexit makes it difficult so I'm only going to Ireland."
Denmark

"Too much hassle with Brexit and Covid"
Belgium

"The United Kingdom is not in the European Union"
Poland

"Due to Brexit, there is a lot of uncertainty"
Netherlands

"Brexit, foreigners not welcome, currency, leadership and petty politics"
France

"Because of Brexit, Since I don't have a passport"
Germany

"Due to Brexit and its impact on hospitality"
Italy

COVID-19 & Costs

"Don't wear a mask with COVID-19"
South Korea

"it is not safe in terms of security and COVID."
New Zealand

"Now there are news of Covid cases on the rise in the UK, so I dropped my plan to visit"
India

"Too crowded and expensive. Not worth the price."
USA

"Prices are high, food is poor, and tourist attractions are few."
Japan

"The place is very far away and too expensive"
Malaysia

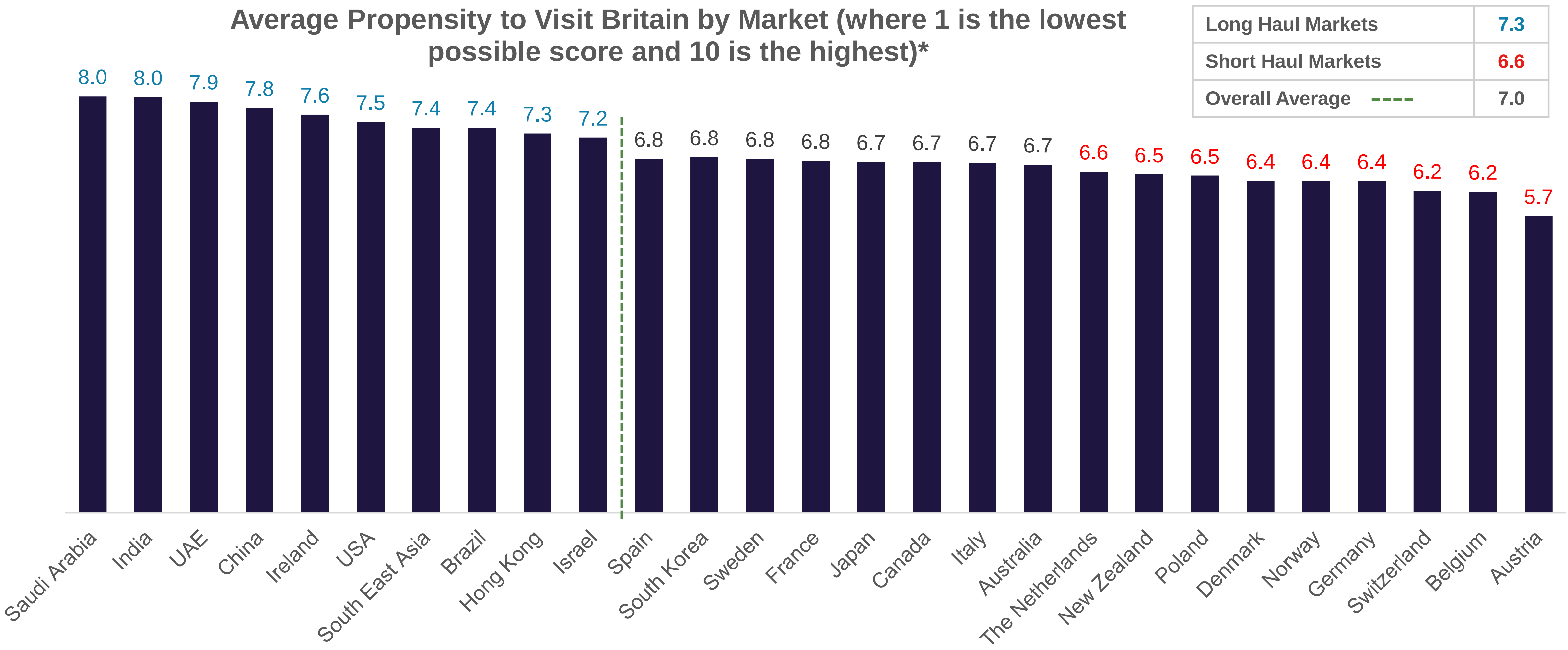
"Worried about Covid 19 and getting caught overseas"
Austria

"Afraid of getting Covid-19 when traveling"
Singapore

C5. Please tell us, in your own words, why you say you would not consider visiting Britain for a leisure break or holiday in the next 5 years?
Base is non-considerers (apart from visitors, then screened out of the survey). NB fieldwork took place in March/April 2022.

Propensity to visit Britain varies by market, with the highest indicators seen in the Middle East

Long Haul Markets	7.3
Short Haul Markets	6.6
Overall Average ----	7.0



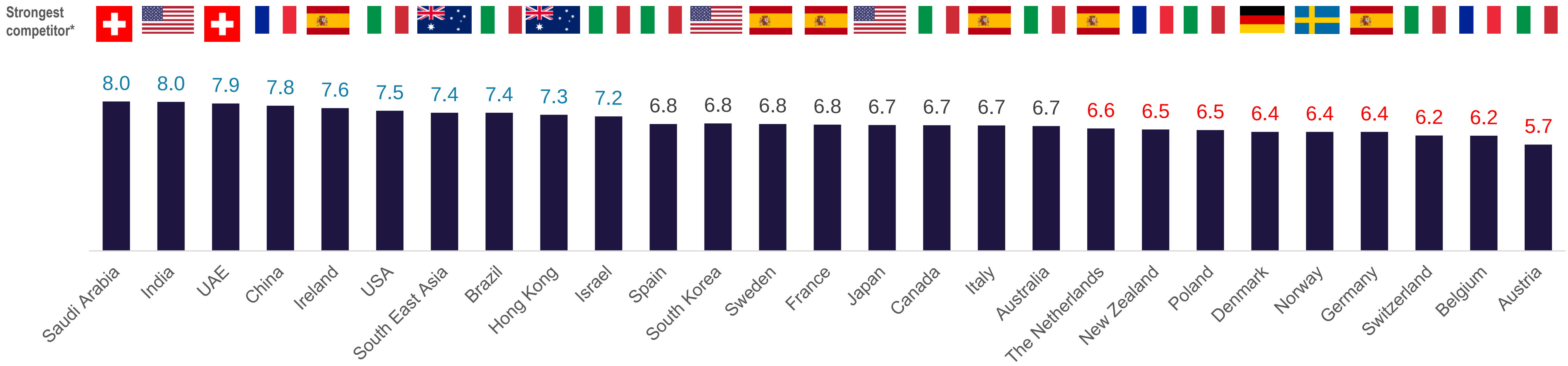
*Base is general population sample only; excludes boost of GB visitor; n=21,946; global weighting applied

D5: How likely is it that you will visit the following countries in the next 2 years for a holiday or short break? Please give a score between 1 and 10, where 1 would mean that you are not at all likely and 10 that you are very likely to visit that country in the next 2 years.
Blue numbers are statistically higher than the average; red are statistically lower @ 95% confidence

Italy and Spain represent the strongest immediate competitors when it comes to inbound tourism to Britain

Every market scored a range of competitor destinations alongside Britain. The following illustrates where Britain ranked in the propensity ratings, alongside its most immediate competitors (highest ranked excluding GB). European markets, but particularly those in Western and Northern Europe, illustrate more reluctance to visit Britain, especially when compared to other destinations.

SAU	IND	UAE	CHN	IRE	USA	SEA	BRA	HKG	ISR	ESP	KOR	SWE	FRA	JAP	CAN	ITA	AUS	NLD	NZL	POL	DNK	NOR	DEU	SWZ	BEL	AUT
1st	3rd	1st	1st	1st	1st	2nd	3rd	1st	1st	4th	1st	1st	3rd	2nd	1st	2nd	1st	2nd	1st	2nd	2nd	3rd	5th	5th	5th	5th



D5: How likely is it that you will visit the following countries in the next 2 years for a holiday or short break? Please give a score between 1 and 10, where 1 would mean that you are not at all likely and 10 that you are very likely to visit that country in the next 2 years.
Blue numbers are statistically higher than the average; red are statistically lower @ 95% confidence
*Based on highest ranking propensity to visit score excluding GB

Long-haul represents a more pan-European opportunity

Whilst Britain is our focus, we need to remain highly conscious and empathetic to the desire of long-haul travellers to combine their trip with other European destinations, almost two thirds of whom will combine a trip to Britain with at least one European destination.

This means understanding both how to competitively position Britain perceptually, but also identifying ownable and 'unmissable' products, experiences and destinations.

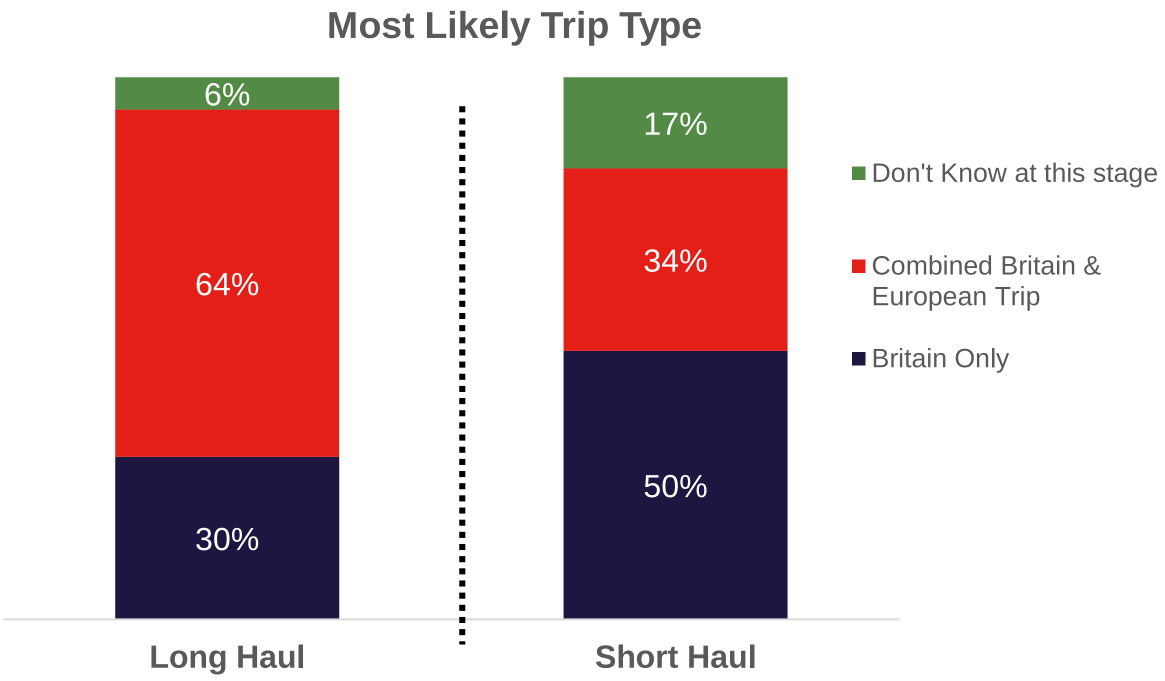


Image: London; Greater London; England; VisitBritain/Sam Barker

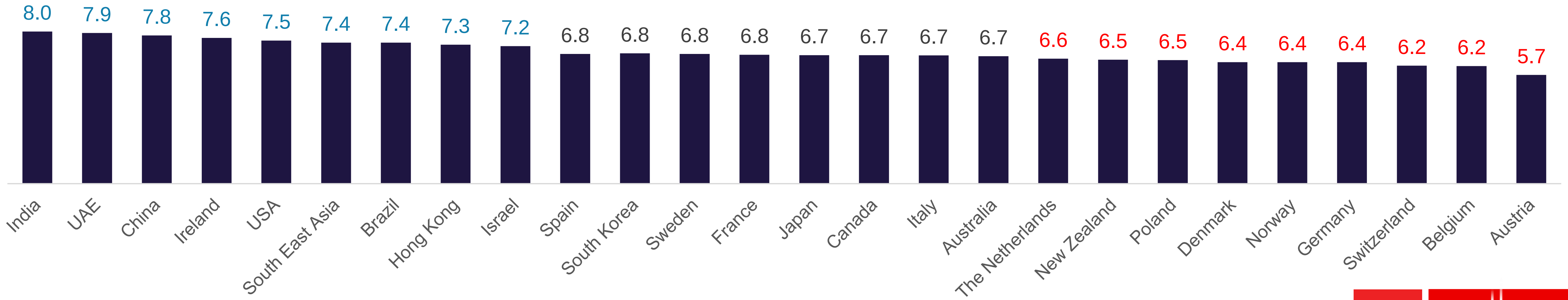
Important note: these figures are intention only – other data pre-dating COVID suggests only 13% of international visitors combine a trip to Britain with another destination, so this shift might reflect either a new context, intention is much higher than behaviour, or both.

D6: You gave Britain a score of 6 or higher in terms of likelihood to visit in the next 2 years.
Which of the following is most likely to be true when thinking about a future break or holiday to Britain?
Base: those scoring 6+ on D5. Propensity to visit Britain; n=17,035; Long Haul n=10.301; Short Haul n=6,734,

The following table highlights market differences when it comes to being more likely to take a Britain-only trip or combined European one

Those with a propensity to visit score of 6 or more were asked whether their trip might be to Britain only, part of a European trip, or whether they didn't know right now. **Column percentages are shown**, with the highest percentage per column highlighted.

%	SAU	IND	UAE	CHN	IRE	USA	SEA	BRA	HKG	ISR	ESP	KOR	SWE	FRA	JAP	CAN	ITA	AUS	NLD	NZL	POL	DNK	NOR	DEU	SWZ	BEL	AUT
Britain Only	28	43	25	28	**56**	41	31	19	28	41	**46**	19	**56**	**46**	22	24	**44**	20	33	30	41	**59**	**65**	**56**	**56**	37	**54**
Combine Britain & Europe	**67**	**53**	**71**	**66**	31	**54**	**64**	**78**	**62**	**42**	35	**77**	29	36	**62**	**69**	37	**73**	**48**	**64**	41	25	23	32	27	**40**	30
Don't Know	4	4	4	6	13	5	5	2	10	16	19	4	15	18	16	7	19	7	18	6	18	16	12	12	17	24	16
Base n=	*569*	*909*	*581*	*914*	*562*	*1265*	*861*	*846*	*537*	*469*	*753*	*748*	*451*	*716*	*732*	*725*	*749*	*710*	*456*	*435*	*442*	*381*	*388*	*651*	*392*	*430*	*363*



D6: You gave Britain a score of 6 or higher in terms of likelihood to visit in the next 2 years.
Which of the following is most likely to be true when thinking about a future break or holiday to Britain
Base: those scoring 6+ on D5. Propensity to visit Britain; n=17,035

Developing a proxy for market prioritisation

What can we learn from mapping and clustering the markets in terms of desire to visit Britain alongside urgency?

Whilst all markets are a focus for Britain, tourism appetite varies significantly, both in terms of **DESIRE/ DEMAND** as well as **PRIORITY/ URGENCY.**

We are able to create proxy measures of both of these dimensions in order to help identify different priority clusters.

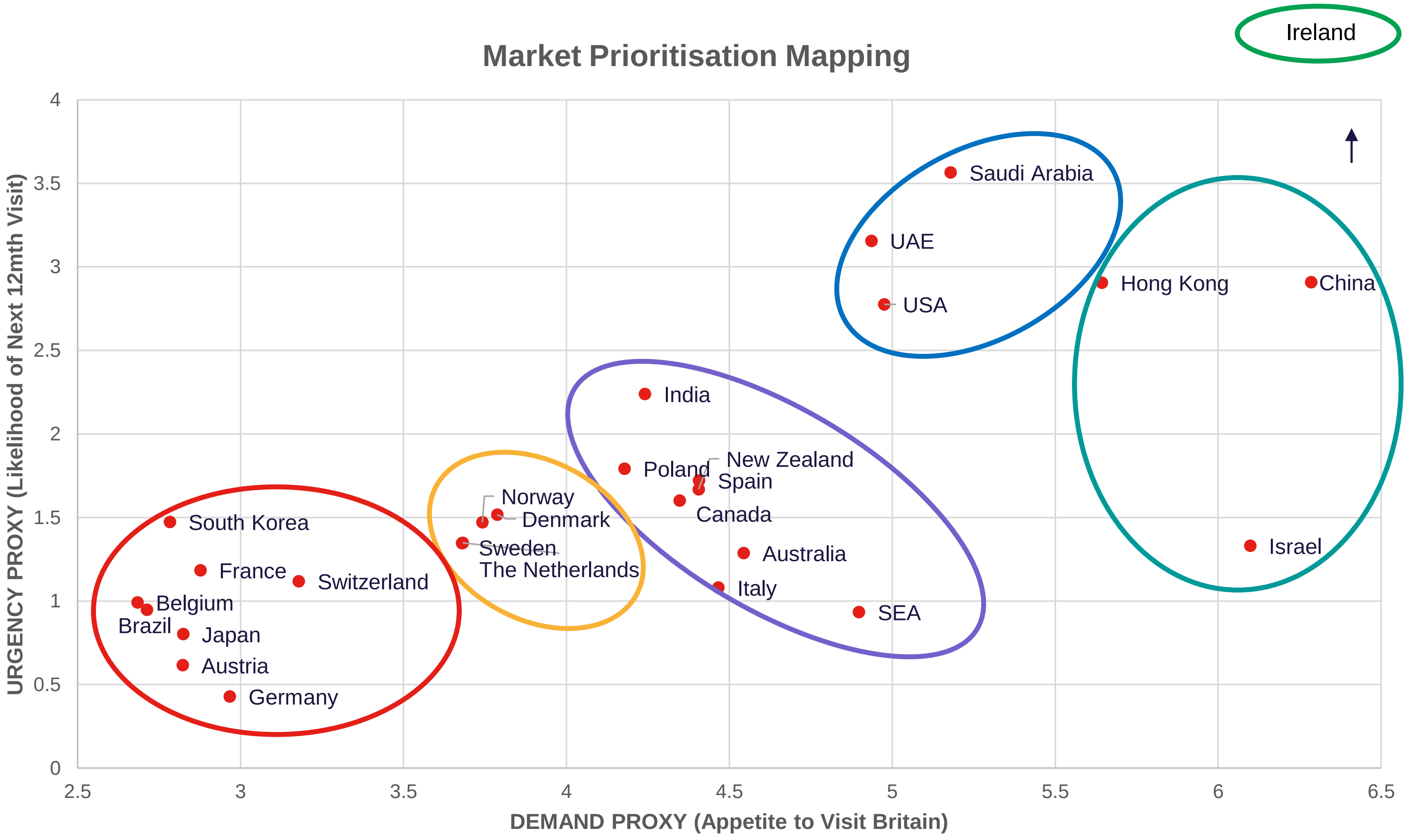
DESIRE/ DEMAND

A combination of % CONSIDERING Britain in the next 5 years and Propensity to Visit in the next 2 years.

PRIORITY/ URGENCY

A combination of % of Considerers who say they will visit Britain in the next 12 months and the rank order of next 12 month stated intention relative to other competitors (higher = more likely to actually visit in the next 12 months)

Mapping these two dimensions informs potential market prioritisation



Important Note: travel restrictions remained in place in some markets during the fieldwork period and should be taken into account in referencing this chart (March 2022)

- Immediate & strong conversion opportunity
- Strong immediate potential (may need to focus on urgency in Israel)
- Potent opportunity – may need longer planning & seeding lead-time
- Solid opportunity, but need to dial up a need for commitment
- Lower interest markets – need to create targeted reason to visit
- Most vulnerable to our stronger competitors – may require niche offers or communications

Mapping of Demand & Urgency proxy measures (see previous page for full explanation): Question sources: C4. Consideration (including screen-outs); C6. When visit Britain; D5. Propensity to visit Britain. Ireland is positioned much higher on the vertical axis, so is shown in this way to make the rest of the map easier to read

Propensity to visit is actually higher amongst Britain visitors than it is amongst considerers

This is **a surprising finding** as we usually see recent visitors are LESS interested in taking a break or holiday in Britain given their recent visitation.

One might assume that this is because, in this data set, we treat a 'British visitor' more liberally than usual, including all those visiting in the past 5 years. This approach would then reduce the dampened enthusiasm for re-visiting based on recent visitation.

To test this hypothesis, we looked at WHEN visitors claim to have most recently visited Britain. The results are **surprising in that propensity to visit Britain is significantly higher amongst recent visitors** than those who visited 1-3 or 3-5 years ago.

Our conclusion on considered review of this data, is that the experience of travelling during a pandemic, (for those lucky enough to have been able to travel), has heightened a desire to re-visit Britain, as **visitors may have been unable to satisfy their experiences of a 'full' British break or holiday** in the same way they might have pre-2020. It also highlights the importance of frequent visitors to Britain.

PROPENSITY TO VISIT BRITAIN
(average on 10-point scale, where 10 is highest)

7.4	6.7
Britain Visitors	**Britain Considerers**

PROPENSITY TO VISIT BRITAIN ACCORDING TO WHEN THEY MOST RECENTLY VISITED
(average on 10-point scale, where 10 is highest)

8.5	7.7	6.7
Within Past 12 Months	**1-3 Years Ago**	**3-5 Years Ago**

D5. Propensity to visit Britain x Visitors to Britain n=8,497; global weight applied.
D5. Propensity to visit Britain x C3. When likely to Visit Britain. Base is global Britain visitors n= 8,497 with global weighting applied.
Base sizes for visitors: within past 12 months n=1,769; 1-3yrs n=3,249; 3-5yrs 3,479
Blue numbers are significantly higher; **red** significantly lower at 95% confidence

Distance is not a barrier when it comes to appetite to visit Britain, with long-haul markets in the Middle East, Asia and USA showing some of the strongest demand.

Trips from long-haul markets are far more likely to be thought of as one that **combines European destinations as well as Britain.**

Ireland (as a source market) shows very strong potential when it comes to both appetite to visit and probability of visiting in the immediate future (i.e. low-hanging fruit for quick conversion).

Other **destinations can be clustered** in terms of stage in the customer journey, with only a handful such as Germany, Austria, Belgium, and Brazil showing signs of being much more difficult to convert.

Recent events (Brexit, COVID and economic after-effects) **have created a barrier** for some and those having already visited need a much stronger reason to return given the choice available now the world has re-opened.

Italy and Spain represent strong competitors (or partners), and **Switzerland, USA and Australia** are also key competitors for long-haul markets.

In Summary

Strong appetite to visit Britain in a post-pandemic world, with viable opportunities in attracting pan-European trips from long-haul markets

03 Headwinds of Note

The world has experienced dramatic events in recent times...

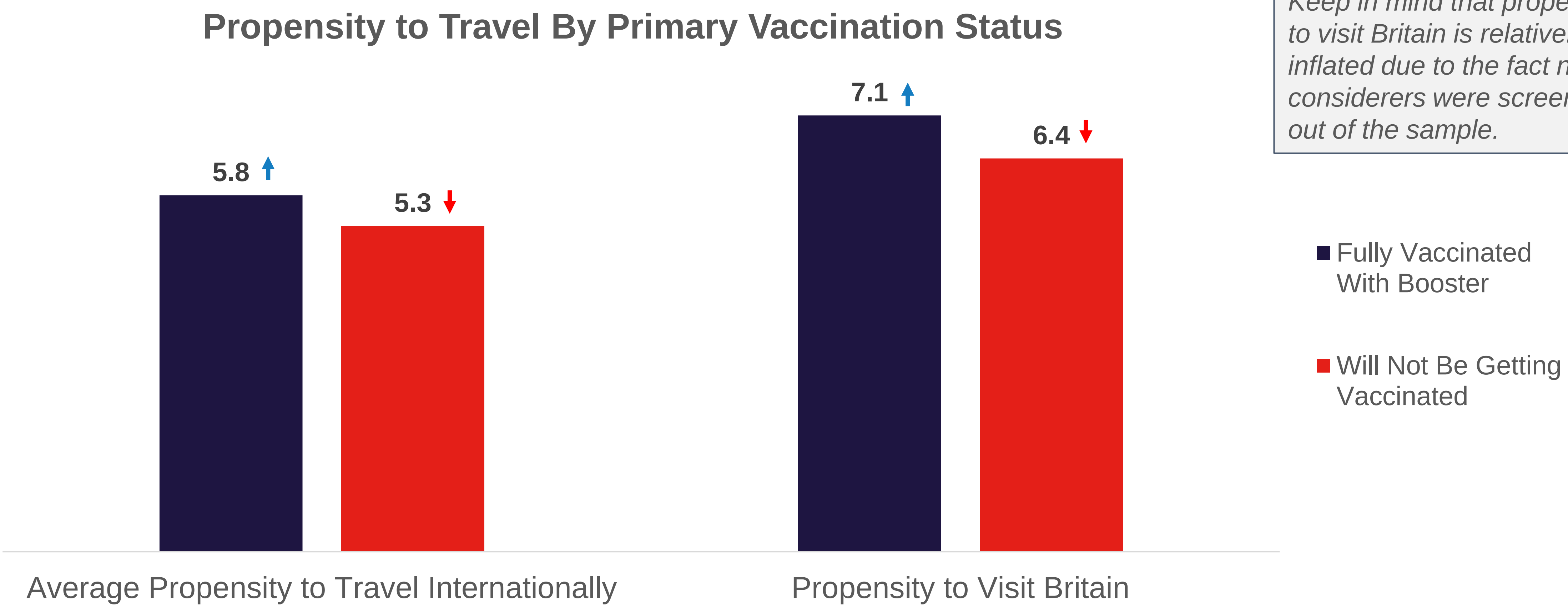
How have these events impacted and shaped tourism and prospective tourism?

Headwind 1: COVID-19

How has the pandemic impacted tourism decision-making?

Vaccination status directly impacts both propensity to visit Britain, but also propensity to travel internationally in general

Whilst we cannot imply causality (does vaccination status drive desire to travel or vice-versa), we can confirm that those vaccinated are more likely to be travelling than those choosing not to be vaccinated.

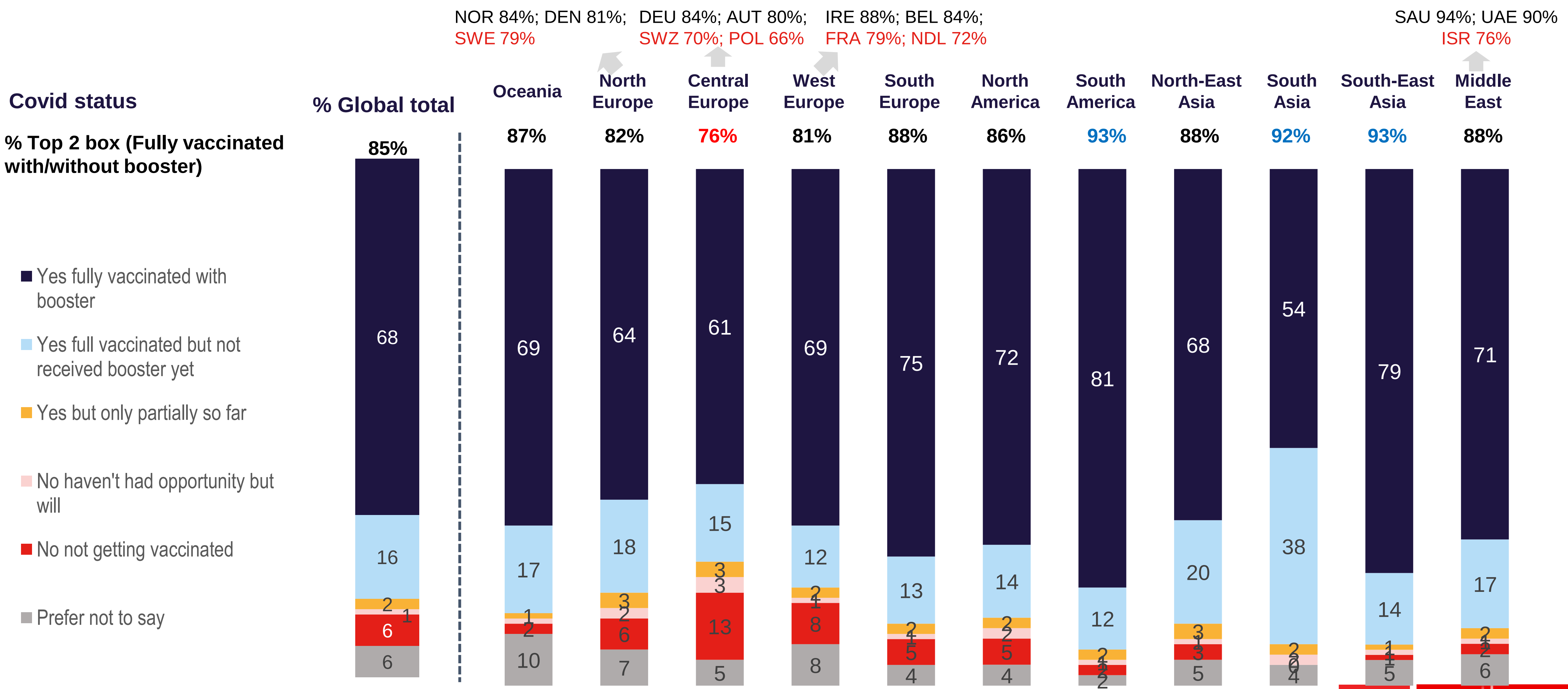


Keep in mind that propensity to visit Britain is relatively inflated due to the fact non-considerers were screened out of the sample.

J7. Have you had a COVID-19 vaccination? Base N=22,840; global weighting applied. NB fieldwork took place in March/April 2022.

Higher than comparative column @ 95% (colours may change for optimal visibility)
Lower than comparative column @ 95% (colours may change for optimal visibility)

Those vaccinated represent 85% of global travellers – the majority with boosters. South America (Brazil) and SEA see strongest vaccination levels overall while Central Europe sees the lowest (driven by Poland & Switzerland)



J7. Have you had a COVID-19 vaccination?; Base n=22,840; Global weighting applied
Blue indicates figures significantly higher than total or comparative base; red are significantly lower @ 95% confidence. NB fieldwork took place in March/April 2022.

We look at tourism considerations specific to the topic of the pandemic next

First, we will look at any/all concerns. For this question, respondents could select as many answers as they liked to indicate which considerations are important to them.

Within the ones each respondent selected, we then asked them to indicate which was the single MOST important consideration.

Both responses are captured on the following page.

In considering this data, **it is important to keep in mind the fieldwork dates** (March to early April 2022), as the relative importance of each consideration may well have shifted post this fieldwork period, particularly as peak tourism seasons approach.

Question Wording:

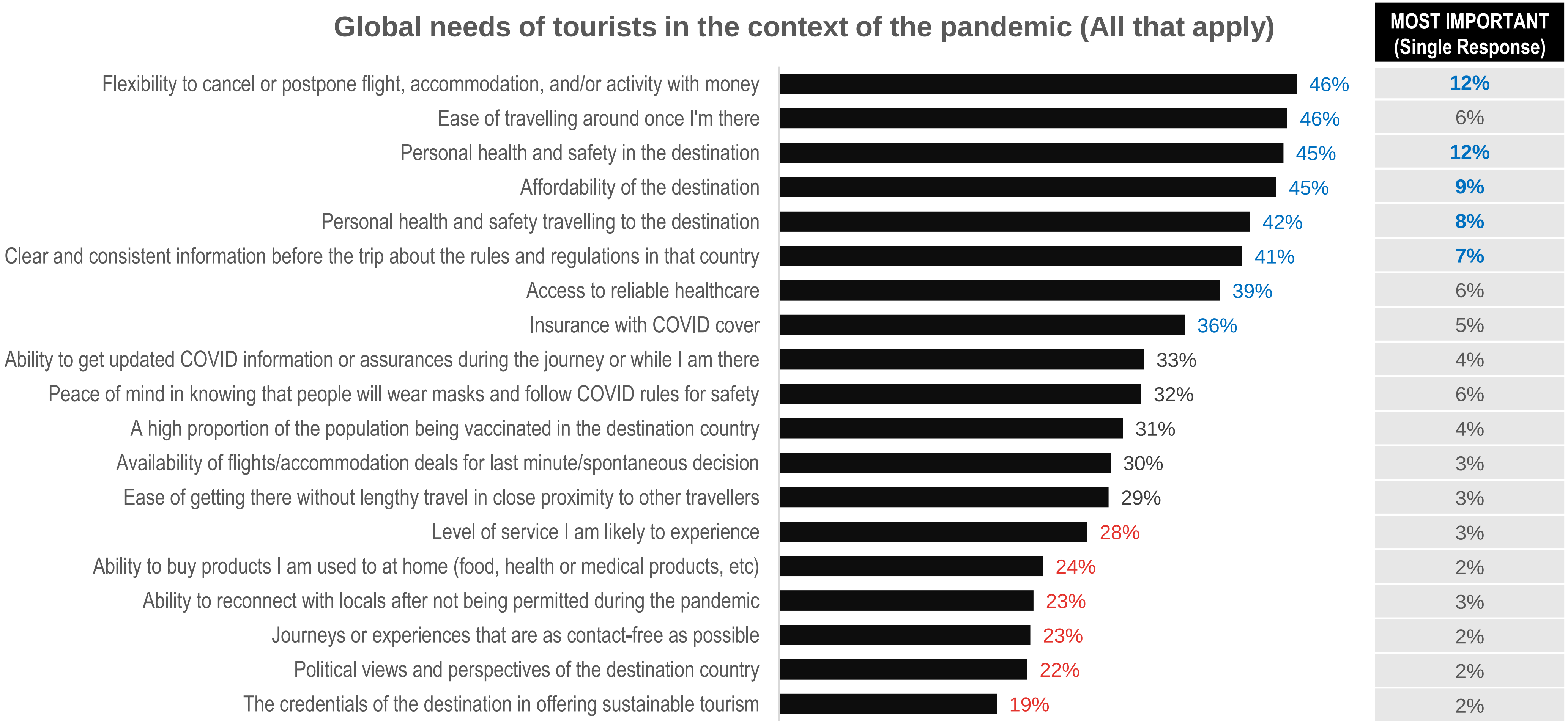
D4a. The global pandemic has obviously had a major impact on the tourism industry. We are interested to know how this has changed the needs of people like yourself in planning a break or holiday abroad.

Below, are some things that may have become more important to you in planning a holiday abroad.

Please select the considerations that are important to you personally (respondent could select as many considerations as they liked here).

D4b. And which of these considerations would you say is the MOST important to you personally right now? (respondent is asked to select only one here).

When it comes to travel, flexibility and reassurances around personal health and safety are the most essential COVID-related considerations for travellers and this extends to the costs involved to cover the unexpected



D4a: The global pandemic has obviously had a major impact on the tourism industry. We are interested to know how this has changed the needs of people like yourself in planning a break or holiday abroad. Below, are some things that may have become more important to you in planning a holiday abroad. Please select the considerations that are important to you personally (multiple response). Base N=22,840; global weighting applied
D4b. And which of these considerations would you say is the MOST important to you personally right now? (only asked of those indicated at D4a). NB fieldwork took place in March/April 2022.

There are regional differences, however, which are influenced by the cost/commitment of international travel, but also localised fears and concerns

	TOP 5 GLOBAL NEEDS & MOST IMPORTANT BY REGION	Total	Western Europe	Central Europe	Northern Europe	Southern Europe	Middle East	North America	South America	South Asia	SEA	NEA	Oceania
1	Flexibility to cancel or postpone flight, accommodation, and/or activity with money-back guarantee	12%	**16%**	**15%**	13%	15%	**9%**	12%	**8%**	**8%**	**10%**	**6%**	**17%**
2	Personal health and safety in the destination	12%	12%	12%	**10%**	**10%**	11%	11%	11%	11%	14%	**14%**	12%
3	Affordability of the destination	9%	**12%**	**11%**	**16%**	**8%**	9%	10%	**2%**	**6%**	9%	**4%**	10%
4	Personal health and safety travelling to the destination	8%	**6%**	8%	**6%**	8%	9%	8%	**12%**	9%	10%	**12%**	7%
5	Clear and consistent information before the trip about the rules and regulations in that country	7%	7%	**8%**	7%	6%	6%	7%	8%	**5%**	6%	7%	**5%**
NOT IN TOP 5 GLOBAL, BUT FALL IN TOP 5 NEEDS BY REGION	Access to reliable healthcare	6%			**8%**	**8%**							
	Ability to get updated COVID information or assurances during the journey or while I am there	4%					**8%**			**7%**			
	A high proportion of the population being vaccinated in the destination country	4%							**9%**				
	Peace of mind in knowing that people will wear masks and follow COVID rules for safety	6%							**8%**	**8%**	**8%**	**9%**	
	Insurance with COVID cover	5%									**8%**		**15%**

D4a: The global pandemic has obviously had a major impact on the tourism industry. We are interested to know how this has changed the needs of people like yourself in planning a break or holiday abroad. Below, are some things that may have become more important to you in planning a holiday abroad. Please select the considerations that are important to you personally.
Regional base sizes (see first section); Global weighting. Base size N=22,287. Blue = significantly higher given row and column expected numbers; red = significantly lower. NB fieldwork took place in March/April 2022.

85% of global travellers were vaccinated at time of fieldwork (March/April 2022), with the vast majority of these having also received vaccination boosters.

Whilst there are **differences when it comes to vaccination status by individual market**, these do not appear to be a deterrent to the willingness and desire to travel, but **more related to vaccination supply and roll-outs.**

Despite high vaccination rates, the pandemic has left **a shadow of uncertainty** amongst global tourists.

Personal health and safety whilst travelling remain an important concern for most, but **flexibility in bookings remains the dominant concern**, particularly those where the risks and costs of cancellation are high.

In Summary

Global tourists are vaccinated and ready to travel, but we see a continued need for flexibility and reassurance in a post-pandemic environment

Headwind 2: The Russian invasion of Ukraine

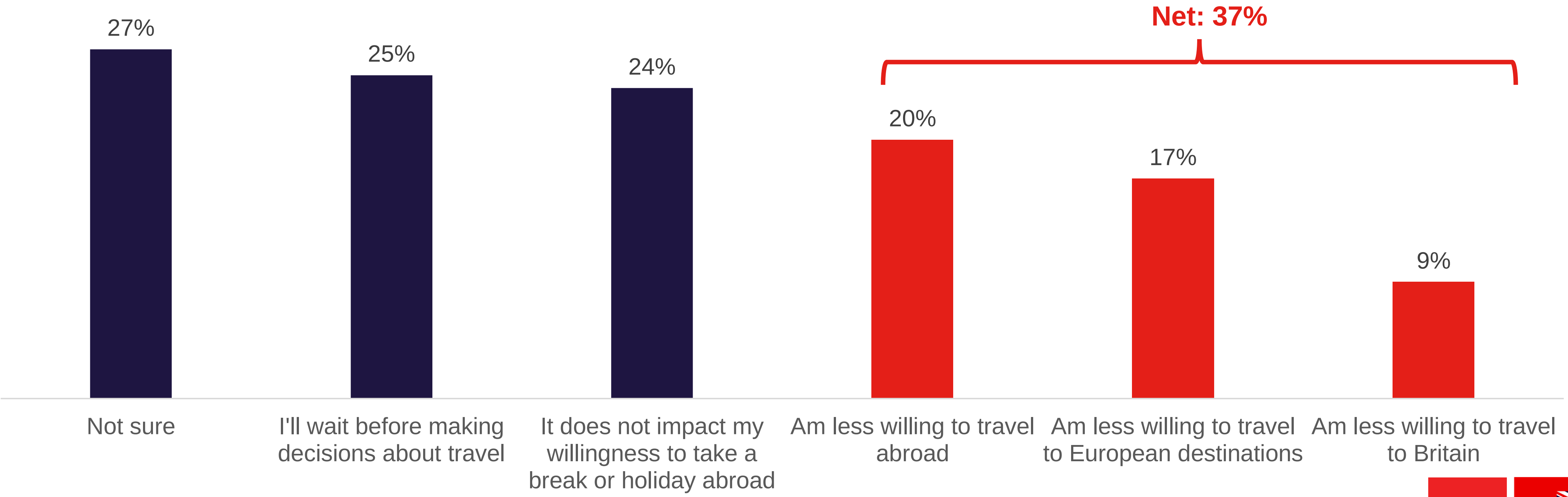
How has the Ukraine war impacted the intentions of tourists?

At the time of fieldwork, the Ukraine conflict created uncertainty, with over a third of respondents saying they would be less willing to travel

When field work was conducted, the Ukraine conflict had just commenced. The overall impact on Britain, specifically, is low at only 9%, but there is still likely an impact for long-haul travellers being more reluctant to consider European destinations or international travel generally. People were also waiting and observing how these events would unfold before making decisions regarding international travel, however, it is uncertain whether this sentiment still exists now that the shock and media coverage has dissipated.

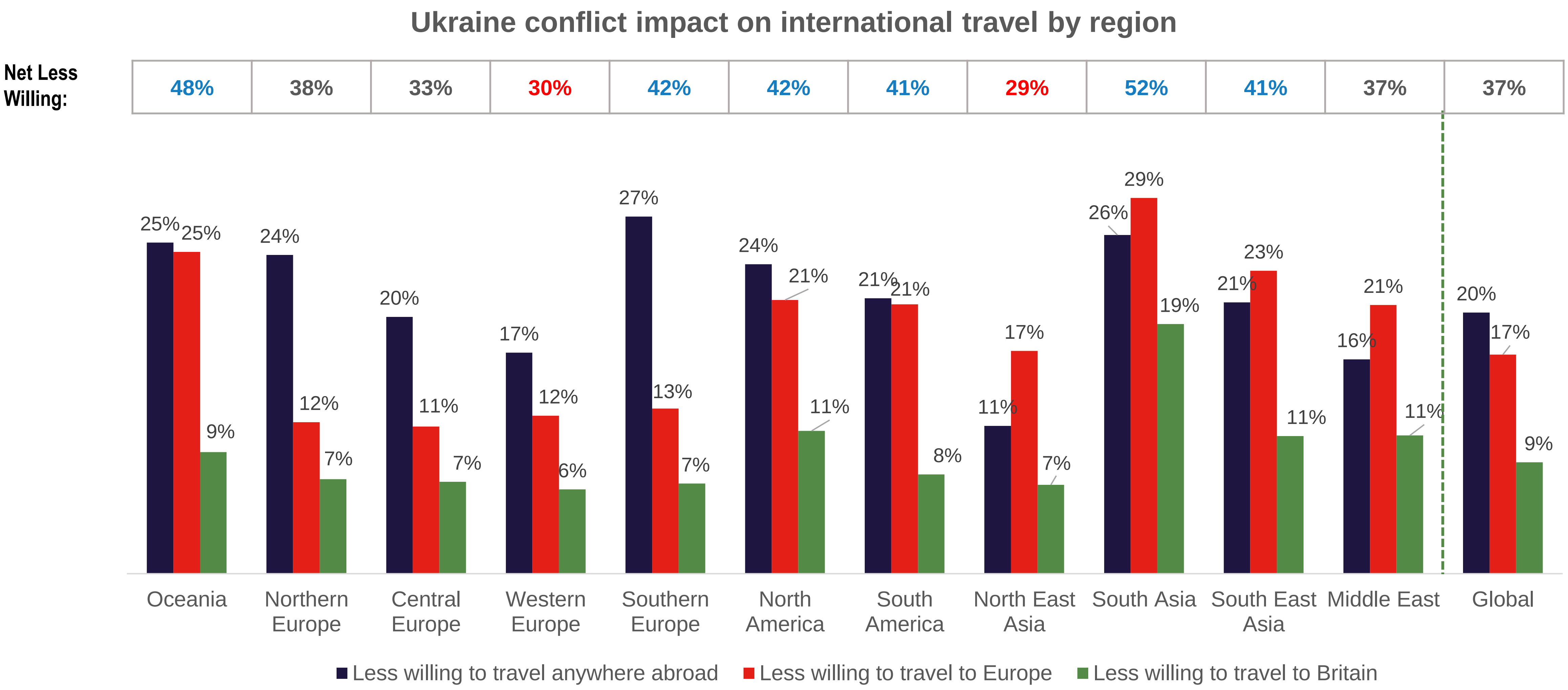
Impact of Ukraine Conflict (as at March 2022)

This question is multiple response, so columns will add to over 100%



D4 What impact, if any, do you think the recent conflict in Ukraine will have on your intention to take a leisure break or holiday abroad in the next 6 months? Global base and weight: N=22,840. NB fieldwork took place in March/April 2022.

Reluctance to travel is quite different by region, with our long-haul markets most impacted by the Ukraine conflict

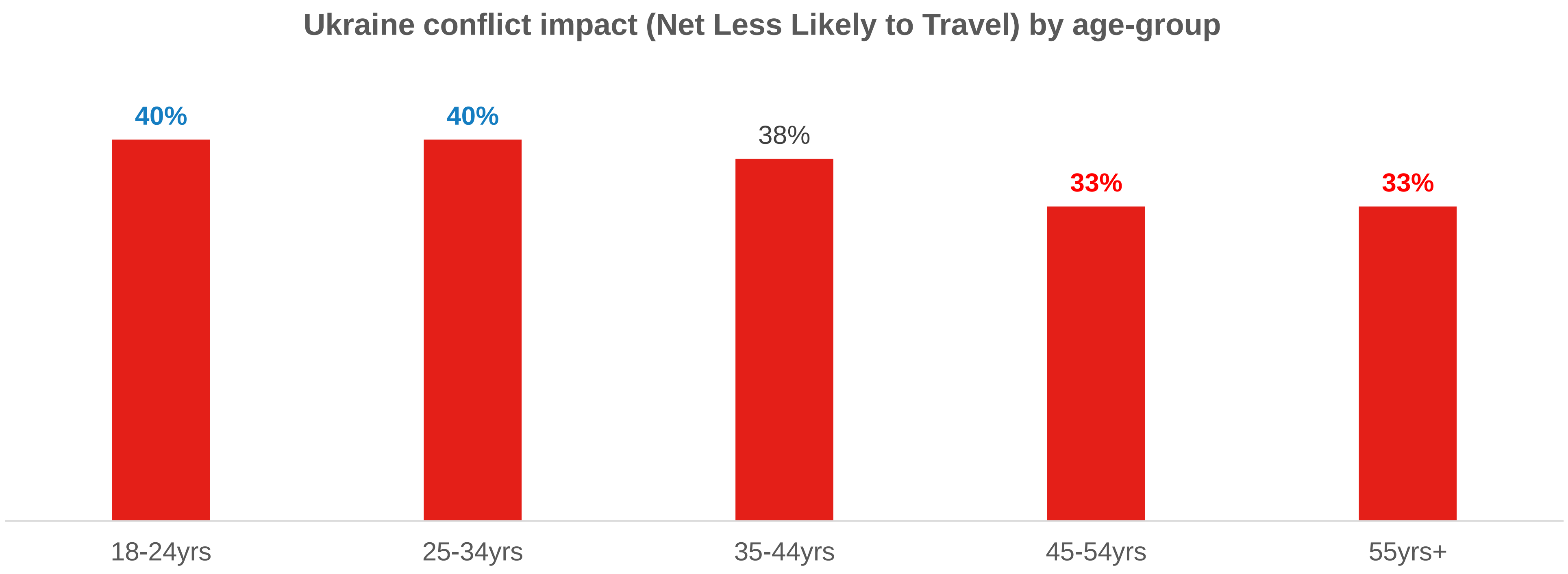


D4 What impact, if any, do you think the recent conflict in Ukraine will have on your intention to take a leisure break or holiday abroad in the next 6 months?; Base sizes by continent (refer sample pages); global weighting applied
Blue figures are significantly higher than global @95% confidence; Red figures are significantly lower than global @95% confidence. NB fieldwork took place in March/April 2022.

kubi kalloo VISIT BRITAIN

It is also interesting to note that younger travellers are the most adversely impacted by the Ukraine conflict

We suspect this might be due to the relative cost and importance of international travel as a proportion of total disposable income, so the risk of extended or increased conflict and its consequences are more likely to reduce enthusiasm to travel abroad. This is interesting, as we typically see a *higher* propensity to visit expressed by younger travellers.



D4 What impact, if any, do you think the recent conflict in Ukraine will have on your intention to take a leisure break or holiday abroad in the next 6 months?; Global base; age groups 18-25 n=3,498; 25-34yrs n=5,348; 35-44yrs n=5,286; 45-54yrs n=4,478; 55+ n=4,230
Blue figures are significantly higher than global @95% confidence; Red figures are significantly lower than global @95% confidence. NB fieldwork took place in March/April 2022.

International conflicts have an enormous impact on tourists' **willingness to travel internationally.** More than a third of travellers indicated being less willing to travel due to the conflict in Ukraine (at time of fieldwork in March/April 2022).

Comparatively, international travelers' **willingness to travel to Britain has not been affected as much** with travellers being more concerned about European destinations.

Geographic location matters. Long haul markets are more sensitive to the Ukraine conflict, perhaps due to the more significant investment in both time and cost.

Different **age groups** respond differently which is most likely reflective of price sensitivity.

Summary

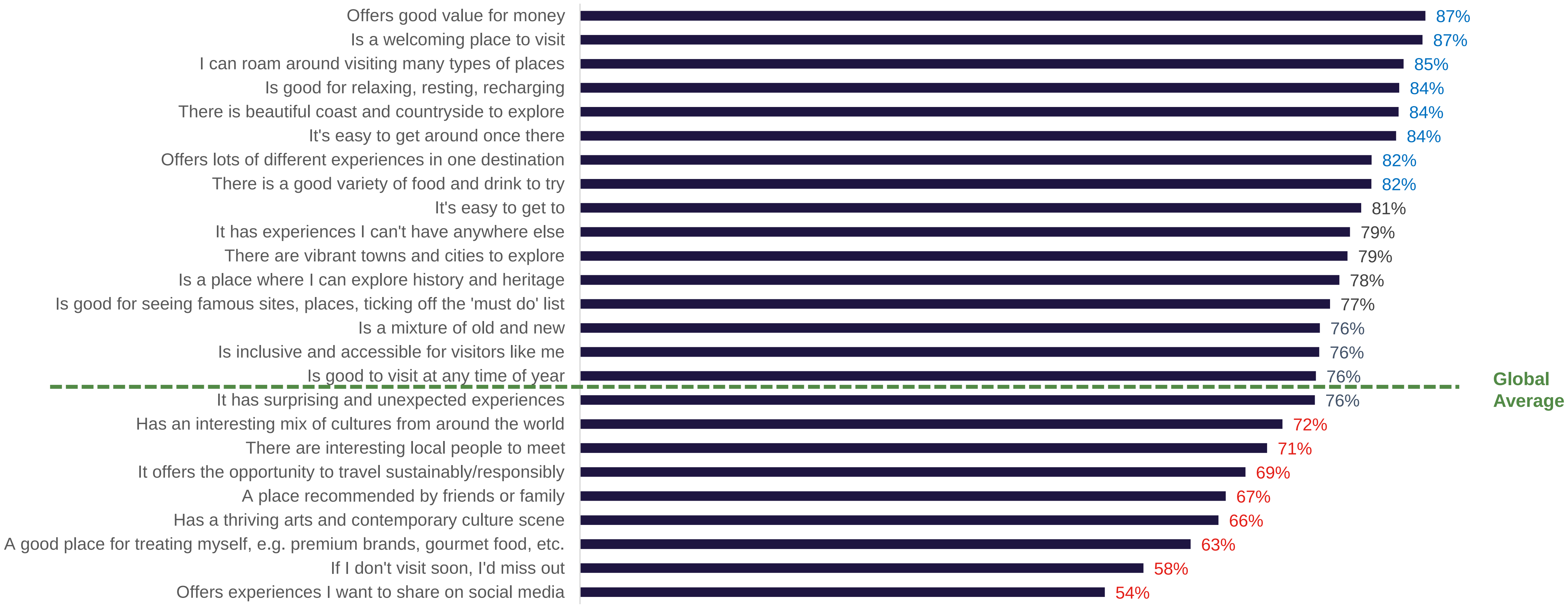
The Ukraine conflict has created uncertainty amongst global travelers, resulting in a reluctance to travel for over a third of the global tourist population

04 Drivers & Motivations

i) What are tourists looking for in choosing a destination for an international break or holiday?

Value for money, welcoming and freedom to explore are key global drivers of destination choice in 2022

Drivers of Influence in Selecting an Destination for an International Break/Holiday (Top 3 box*)



D3. Please tell us how important each of the following considerations are in choosing a destination for an international break or holiday?
(7 point-scale where 7 = 'extremely important' and 1 = 'not at all important'; Blue figures are significantly higher; Red significantly lower
Base N=22,840 Weighted global

**Analysis by Top Box (7/7) shows identical rank-order of drivers*

04 Drivers & Motivations

ii) Within this, there are obviously important regional differences to consider...

Tourists from the Middle East see a similar hierarchy of drivers as globally although ‘welcoming’ is less important to Saudi Arabia

		MIDDLE EAST		
		SAUDI ARABIA	UAE	ISRAEL
TOP 6 DRIVERS IN RANK ORDER	Offers good value for money	✓	✓	✓
	Is a welcoming place to visit	✘	✓	✓
	I can roam around visiting many types of places	✓	✓	✓
	Is good for relaxing, resting, recharging	✓	✓	✓
	There is beautiful coast and countryside to explore	✓	✓	✓
	It's easy to get around once there	✓	✓	✓
UNIQUELY IN TOP 6 DRIVERS	**DRIVERS UNIQUE TO EACH MARKET’S TOP 6 (IN RANK ORDER)**	*There is a good variety of food and drink to try*	*Offers lots of different experiences in one destination*	
OTHER UNIQUE SKEWS*	**OTHER UNIQUE SKEWS BEYOND THE TOP 6 GLOBAL AND MARKET DRIVERS**	*Offers experiences I want to share on social media*	*Offers experiences I want to share on social media*	*Is inclusive and accessible for visitors like me*
		If I don’t visit soon I’d miss out *A good place for treating myself (e.g. premium brands)*		*A place recommended by friends or family*

*Not in Top 6 drivers, but uniquely strong and relevant to that market (where not included, nothing stands out)

D3. Please tell us how important each of the following considerations are in choosing a destination for an international break or holiday?
(7 point-scale where 7 = ‘extremely important’ and 1 = ‘not at all important’)

Visitors from Western Europe demand a variety of interesting people and experiences in a single destination

		WESTERN EUROPE			
		BELGIUM	NETHERLANDS	FRANCE	IRELAND
TOP 6 DRIVERS IN RANK ORDER	Offers good value for money	✓	✓	✓	✓
	Is a welcoming place to visit	✓	✗	✓	✓
	I can roam around visiting many types of places	✓	✓	✓	✓
	Is good for relaxing, resting, recharging	✓	✓	✓	✓
	There is beautiful coast and countryside to explore	✓	✓	✓	✓
	It's easy to get around once there	✓	✗	✗	✓
UNIQUELY IN TOP 6 DRIVERS	**DRIVERS UNIQUE TO EACH MARKET'S TOP 6 (IN RANK ORDER)**		*It has experiences I can't have anywhere else*	*Offers lots of different experiences in one destination*	
			Offers lots of different experiences in one destination		
OTHER UNIQUE SKEWS*	**OTHER UNIQUE SKEWS BEYOND THE TOP 6 GLOBAL AND MARKET DRIVERS**			*There are interesting local people to meet*	*It's easy to get to*

*Not in Top 6 drivers, but uniquely strong and relevant to that market (where not included, nothing stands out)

D3. Please tell us how important each of the following considerations are in choosing a destination for an international break or holiday?
(7 point-scale where 7 = 'extremely important' and 1 = 'not at all important')

Northern and & Central European tourists share largely common motivations to other global markets

		CENTRAL EUROPE				NORTHERN EUROPE		
		AUSTRIA	GERMANY	POLAND	SWITZERLAND	DENMARK	SWEDEN	NORWAY
TOP 6 DRIVERS IN RANK ORDER	Offers good value for money	✓	✓	✓	✓	✓	✓	✓
	Is a welcoming place to visit	✓	✓	✓	✓	✓	✓	✓
	I can roam around visiting many types of places	✓	✓	✓	✓	✓	✓	✗
	Is good for relaxing, resting, recharging	✓	✓	✓	✓	✓	✓	✓
	There is beautiful coast and countryside to explore	✓	✓	✓	✓	✓	✗	✗
	It's easy to get around once there	✗	✗	✓	✗	✓	✓	✓
UNIQUELY IN TOP 6 DRIVERS	**DRIVERS UNIQUE TO EACH MARKET'S TOP 6 (IN RANK ORDER)**	*There is a good variety of food and drink to try*	*There is a good variety of food and drink to try*		*There is a good variety of food and drink to try*		*There is a good variety of food and drink to try*	*It's easy to get to*
								Is inclusive and accessible for visitors like me
OTHER UNIQUE SKEWS*	**OTHER UNIQUE SKEWS BEYOND THE TOP 6 GLOBAL AND MARKET DRIVERS**							

*Not in Top 6 drivers, but uniquely strong and relevant to that market (where not included, nothing stands out)

D3. Please tell us how important each of the following considerations are in choosing a destination for an international break or holiday? (7 point-scale where 7 = 'extremely important' and 1 = 'not at all important')

Southern European tourists are less interested in relaxing and more interested in cultural exploration

		SOUTHERN EUROPE	
		SPAIN	ITALY
TOP 6 DRIVERS IN RANK ORDER	Offers good value for money	✓	✓
	Is a welcoming place to visit	✓	✓
	I can roam around visiting many types of places	✓	✓
	Is good for relaxing, resting, recharging	✘	✘
	There is beautiful coast and countryside to explore	✘	✓
	It's easy to get around once there	✓	✓
UNIQUELY IN TOP 6 DRIVERS	**DRIVERS UNIQUE TO EACH MARKET'S TOP 6 (IN RANK ORDER)**	*There are vibrant towns and cities to explore*	*Is good for seeing famous sites, places, ticking off the 'must do' list*
		Is a place where I can explore history and heritage	
OTHER UNIQUE SKEWS*	**OTHER UNIQUE SKEWS BEYOND THE TOP 6 GLOBAL AND MARKET DRIVERS**	*Is a mixture of old and new*	*Has a thriving arts and contemporary culture scene*
		There are interesting local people to meet	*It offers the opportunity to travel sustainably*

*Not in Top 6 drivers, but uniquely strong and relevant to that market (where not included, nothing stands out)

D3. Please tell us how important each of the following considerations are in choosing a destination for an international break or holiday?
(7 point-scale where 7 = 'extremely important' and 1 = 'not at all important')

Visitors from the Americas are less likely to be looking for rest & relaxation, and more motivated by choosing a destination with lots of places to visit and explore

		AMERICAS		
		USA	CANADA	BRAZIL
TOP 6 DRIVERS IN RANK ORDER	Offers good value for money	✓	✓	✓
	Is a welcoming place to visit	✓	✓	✓
	I can roam around visiting many types of places	✓	✓	✓
	Is good for relaxing, resting, recharging	✗	✗	✗
	There is beautiful coast and countryside to explore	✓	✓	✗
	It's easy to get around once there	✓	✓	✓
UNIQUELY IN TOP 6 DRIVERS	**DRIVERS UNIQUE TO EACH MARKET'S TOP 6 (IN RANK ORDER)**	*Is good for seeing famous sites, places, ticking off 'must do' list*	*There is a good variety of food and drink to try*	*It has experiences I can't have anywhere else*
				There is a good variety of food and drink to try
OTHER UNIQUE SKEWS*	**OTHER UNIQUE SKEWS BEYOND THE TOP 6 GLOBAL AND MARKET DRIVERS**	*Everything except 'good for relaxing, resting, recharging'*	*Is good for seeing famous sites, places, ticking off 'must do' list*	*Everything!*
			Is inclusive and accessible for visitors like me	

*Not in Top 6 drivers, but uniquely strong and relevant to that market (where not included, nothing stands out)

D3. Please tell us how important each of the following considerations are in choosing a destination for an international break or holiday?
(7 point-scale where 7 = 'extremely important' and 1 = 'not at all important')

Value for money is less important for North-East Asian tourists. Relaxing is important for both North-East and South-East Asian tourists

		NORTH-EAST ASIA				SOUTH-EAST ASIA
		CHINA	HONG KONG	JAPAN	SOUTH KOREA	
TOP 6 DRIVERS IN RANK ORDER	Offers good value for money	✗	✓	✗	✗	✓
	Is a welcoming place to visit	✗	✗	✓	✓	✓
	I can roam around visiting many types of places	✗	✓	✓	✓	✓
	Is good for relaxing, resting, recharging	✓	✓	✓	✓	✓
	There is beautiful coast and countryside to explore	✓	✗	✗	✓	✗
	It's easy to get around once there	✗	✓	✓	✓	✗
UNIQUELY IN TOP 6 DRIVERS	**DRIVERS UNIQUE TO EACH MARKET'S TOP 6 (IN RANK ORDER)**	*There is a good variety of food and drink to try*	*There is a good variety of food and drink to try*	*There is a good variety of food and drink to try*	*There is a good variety of food and drink to try*	*Offers lots of different experiences in one destination*
		Is good for seeing famous sites, places, ticking off the 'must do' list	*It's easy to get to*			*It's easy to get to*
		There are vibrant towns and cities to explore		*There are vibrant towns and cities to explore*		
		Has an interesting mix of cultures from around the world				
OTHER UNIQUE SKEWS*	**OTHER UNIQUE SKEWS BEYOND THE TOP 6 GLOBAL AND MARKET DRIVERS**	*Everything except value for money*	*A good place for treating myself, e.g. premium brands, gourmet food, etc.*	*Has a thriving arts and contemporary culture scene*	*If I don't visit soon I'd miss out*	*Everything!*
			Offers experiences I want to share on social media	*A good place for treating myself, e.g. premium brands, gourmet food, etc.*	*Has a thriving arts and contemporary culture scene* *A good place for treating myself*	

*Not in Top 6 drivers, but uniquely strong and relevant to that market (where not included, nothing stands out)

D3. Please tell us how important each of the following considerations are in choosing a destination for an international break or holiday?
(7 point-scale where 7 = 'extremely important' and 1 = 'not at all important')

Indian, Australian, and New Zealand tourists don't wish to relax as much as see & tick off 'must do' activities

		SOUTH ASIA	OCEANIA	
		INDIA	AUSTRALIA	NEW ZEALAND
TOP 6 DRIVERS IN RANK ORDER	Offers good value for money	✓	✓	✓
	Is a welcoming place to visit	✓	✓	✓
	I can roam around visiting many types of places	✓	✓	✓
	Is good for relaxing, resting, recharging	✓	✗	✗
	There is beautiful coast and countryside to explore	✓	✓	✓
	It's easy to get around once there	✗	✓	✓
UNIQUELY IN TOP 6 DRIVERS	**DRIVERS UNIQUE TO EACH MARKET'S TOP 6 (IN RANK ORDER)**	*Is good for seeing famous sites, places, ticking off the 'must do' list*	*Is good for seeing famous sites, places, ticking off the 'must do' list*	*Offers lots of different experiences in one destination*
OTHER UNIQUE SKEWS*	**OTHER UNIQUE SKEWS BEYOND THE TOP 6 GLOBAL AND MARKET DRIVERS**	*Everything!*	*Is a place where I can explore history and heritage; explore old & new*	*Is good for seeing famous sites, places, ticking off the 'must do' list*
			Inclusive and accessible for visitors like me	*Inclusive and accessible for visitors like me*

*Not in Top 6 drivers, but uniquely strong and relevant to that market (where not included, nothing stands out)

D3. Please tell us how important each of the following considerations are in choosing a destination for an international break or holiday?
(7 point-scale where 7 = 'extremely important' and 1 = 'not at all important')

Value, welcoming, ability to roam and relax are key global drivers when tourists are choosing a destination to visit, but we do see important regional and cultural differences.

Middle Eastern tourists are more likely to look for places which are inclusive and allow them to tick things off their 'must do' lists.

Western European visitors are more likely to demand a variety of interesting people, experiences and food & beverage options and these needs seem more distinctive than drivers in the other European regions.

Visitors from the Americas seem to be full of energy – they are less likely to be looking for rest and relaxation, but destinations packed with loads to see and do and represent a wide range of diverse experiences in one place.

This footprint of drivers is quite similar to **tourists from India, Australia, and New Zealand** who are also more dynamic on average in their needs and look for single destinations offering a variety of ('must see') experiences.

North-East Asian tourists are more likely to be inclined to choose destinations based more around strong reputation for food and drink options but are also more drawn to vibrant places. For them, value for money is less critical in choice of destination.

In Summary

Value for money leads as the key driver for international travel destination selection in 2022, which is supported by being welcoming and a place to roam to enjoy diverse sites and experiences as well as enjoy, rest & relaxation

05 How is Britain currently perceived by international tourist?

Which perceptions match current drivers and where is there room to flex?

Perceptions of Britain post-pandemic are dominated by the combination of history and vibrancy; the old and new

Proportion associating Britain with each statement

Percentage comparisons should not be made with data showing the impact these attributes have on destination choice (D3) which uses a different scale

**Note, this should not be compared directly to the other attributes and only intends to capture a sense of urgency.*

E1. Below, are some statements which may relate to destinations you might consider for a break or holiday abroad. Please indicate which destinations you associate with the following statements. You can choose as many or as few as you like for each statement or select 'none of these' if you don't think it applies to any destination.; Base N=22,840; global weighting

Perceptions of Britain by market

On the following pages, you will see the rank order of statements perceived to be associated with Britain by each inbound market. These are shown in a table that looks as follows:

The top five global perceptions of Britain are shown here

GLOBAL RANK	TOP PERCEPTIONS OF BRITAIN	RANK ORDER WITHIN MARKET												
		AUT	BEL	NED	DEU	FRA	SWZ	POL	DNK	NOR	SWE	ITA	ESP	IRE
1	Is a place where I can explore history and heritage	3	8	6	2	5	2	6	8	9	11	2	5	5
2	There are vibrant towns & cities to explore	1	1	1	1	6	1	1	1	2	1	7	9	6
3	I can roam around visiting many types of places	7	2	2	3	3	4	10	2	6	5	4	4	3
4	Is a mixture of old and new	6	6	3	8	11	8	7	3	7	8	5	3	9
5	Is good for seeing famous sites, places, ticking off the 'must do' list	2	4	4	5	4	6	4	10	11	6	1	1	8
Not in global top 3, but in country Top 3	*An interesting mix of cultures from around the world*		3					2				3	2	
	It's easy to get around once there					1				3				2
	It's easy to get to									1	2			1
	Is inclusive and accessible for visitors like me										3			
	Is good to visit any time of year					2								
	There are interesting local people to meet							3						
	Offers a lot of different experiences in one destination						3							

The rank order of these top 5 associations with Britain by market are colour-coded so patterns can be quickly seen.

In markets where there are other perceptions of Britain that fall into the top 5 for that market, they are shown here, alongside their rank order. For instance, '*it's easy to get around once there'* is the top perception of Britain amongst French tourists.

The perception of Britain in Europe/short-haul markets are dominated by vibrant towns and cities

		RANK ORDER WITHIN MARKET												
GLOBAL RANK	TOP PERCEPTIONS OF BRITAIN	AUT	BEL	NED	DEU	FRA	SWZ	POL	DNK	NOR	SWE	ITA	ESP	IRE
1	Is a place where I can explore history and heritage	3	8	6	2	5	2	6	8	9	11	2	5	5
2	There are vibrant towns & cities to explore	1	1	1	1	6	1	1	1	2	1	7	9	6
3	I can roam around visiting many types of places	7	2	2	3	3	4	10	2	6	5	4	4	3
4	Is a mixture of old and new	6	6	3	8	11	8	7	3	7	8	5	3	9
5	Is good for seeing famous sites, places, ticking off the 'must do' list	2	4	4	5	4	6	4	10	11	6	1	1	8
Not in global top 3, but in country Top 3	*An interesting mix of cultures from around the world*		*3*					*2*				*3*	*2*	
	It's easy to get around once there					*1*				*3*				*2*
	It's easy to get to									*1*	*2*			*1*
	Is inclusive and accessible for visitors like me										*3*			
	Is good to visit any time of year					*2*								
	There are interesting local people to meet							*3*						
	Offers a lot of different experiences in one destination						*3*							

E1. Below, are some statements which may relate to destinations you might consider for a break or holiday abroad.
Please indicate which destinations you associate with the following statements. You can choose as many or as few as you like for each statement or select 'none of these' if you don't think it applies to any destination.; Base N=22,840; global weighting. Base sizes: AUT 654; BEL 661; NED 647; DEU 1004; FR 1003; SWZ 634; POL 663; DNK 608; NOR 619; SWE 626; ITA 1000; ESP 1001; IRE 697

Whilst perceptions of Britain in the rest of the world/long-haul markets are led by being a place to explore history and heritage

GLOBAL RANK	TOP PERCEPTIONS OF BRITAIN	RANK ORDER WITHIN MARKET													
		AUS	NZ	CHN	HKG	JAP	KOR	IND	SEA	USA	CAN	BRA	SAU	UAE	ISR
1	Is a place where I can explore history and heritage	1	2	1	1	1	2	4	1	1	1	1	1	2	1
2	There are vibrant towns & cities to explore	6	8	5	11	4	7	7	5	2	4	12	5	5	6
3	I can roam around visiting many types of places	4	3	6	4	5	3	2	4	6	5	2	4	14	2
4	Is a mixture of old and new	2	1	4	3	3	4	9	2	4	2	5	6	1	8
5	Is good for seeing famous sites, places, ticking off the 'must do' list	3	4	2	6	6	1	3	3	3	3	4	16	3	9
Not in global top 3, but in country Top 3	*An interesting mix of cultures from around the world*												*2*		
	It's easy to get around once there				*2*										
	Has a thriving arts and contemporary culture scene					*2*									
	Offers experiences I want to share on social media											*3*			*3*
	There is a good variety of food and drink to try							*1*							
	A good place for treating myself (e.g., premium brands, gourmet food, etc.)			*3*									*3*		

E1. Below, are some statements which may relate to destinations you might consider for a break or holiday abroad.
Please indicate which destinations you associate with the following statements. You can choose as many or as few as you like for each statement or select 'none of these' if you don't think it applies to any destination.; Base N=22,840; global weighting. Base sizes: AUS 1036; NZ 673; CHN 1003; HKG 652; JAP 1002; KOR 1002; IND 1026; SEA 1035; USA 1576; CAN 1002; BRA 1091; SAU 647; UAE 662; ISR 616

A summary of key learnings when it comes to how international tourists see Britain and the implications for how we speak to them

We observe patterns of consistency, but also variance when it comes to perceptions of Britain.

Within Europe/Short-Haul markets, there are more pockets of variation, whilst long-haul markets share more commonality in terms of core perceptions, but also require some unique areas of 'flex' when it comes to different cultures and specific markets.

SHORT-HAUL MARKETS

France & **Ireland** share commonalities as the two 'closest' neighbours where speaking to ease/ convenience and fringe season travel aligns with existing perceptual strengths

In **Southern Europe,** Britain stands out as a mix of old and the new; a place of cultural diversity, uniqueness and must-visit sights and places (much like themselves)

In **Norway** & **Sweden**, the idea of Britain as inclusive and easy access to vibrant towns and cities is most dominant

The other **European countries** see Britain as offering vibrant towns & cities, diversity, culture, famous sights and the opportunity for easy exploration and discovery – more similar to long-haul markets

LONG-HAUL MARKETS

Long-haul markets or 'rest of the world' see Britain more consistently as offering heritage & history, the ability to roam and explore a broad mix of 'must-do' experiences (both old & new

WITH IMPORTANT FLEXES REQUIRED IN…

Saudi & China see Britain as a place for 'premium' products, services & experiences

Contemporary arts & culture is a unique perception for Japanese tourists

Food & drink variety is a strong perception held in India

Brazil & Israel see Britain as a great place for social media 'snappability' & sharing

Britain is perceived as being a place where **history and heritage meet modernity and vibrancy.**

It is seen as a place that offers a great deal of **diversity of sites and experiences, including the key 'must see' sites, in one destination.**

This perception **varies significantly between short and long-haul markets**, as European countries, rich in their own history, are more inclined to see Britain as offering the 'vibrant' side of the equation.

In Summary

Strong and consistent perceptions of Britain lie in it being a place where history meets modernity and a range of sites and ('must-see') experiences are offered within easy access

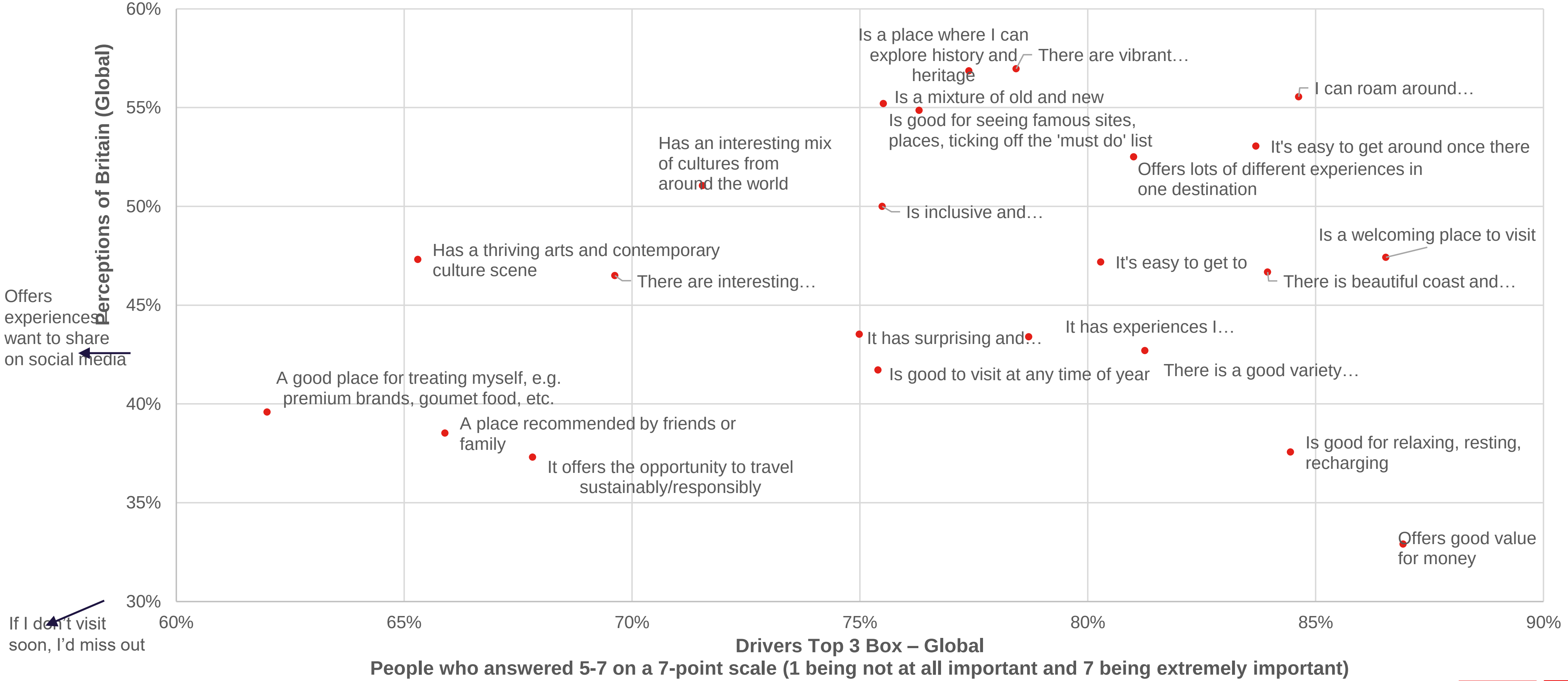
Combining Drivers and Perceptions

How well does the perception of Britain deliver to the needs of international travellers in choosing a destination?

Mapping drivers against perceptions of Britain allows us to identify a global hierarchy of brand ‘hooks’

We have previously looked at global drivers of international destination choice, here this is plotted on the horizontal (x) axis. We have also looked at perceptions of Britain, here this is plotted on the vertical (y) axis. By combining these two measures we can identify how we perform in the areas that matter.

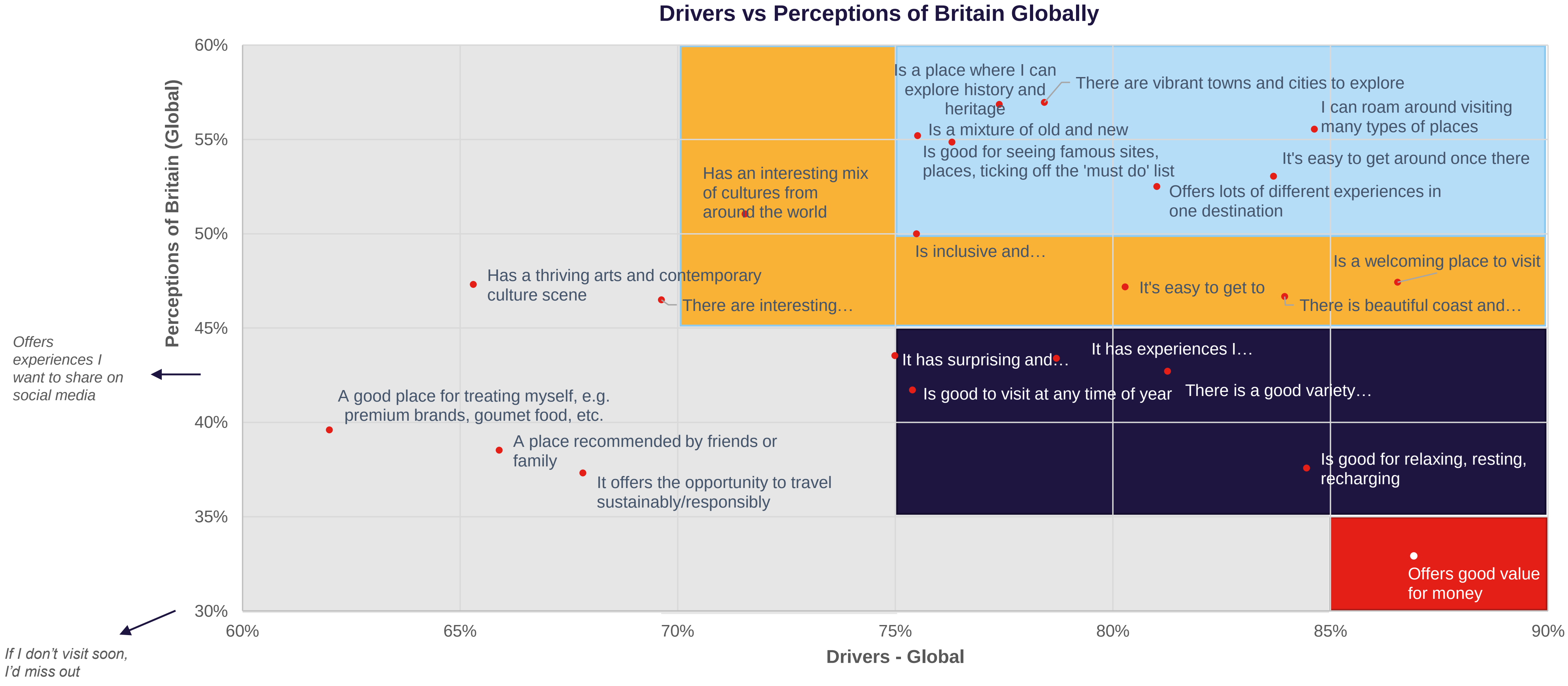
Drivers vs Perceptions of Britain Globally



E1. Britain perceptions mapped against D3. Drivers for International Tourists; Total base size N=22,840; Global weighting applied

Mapping drivers against perceptions of Britain allows us to identify a global hierarchy of brand 'hooks'

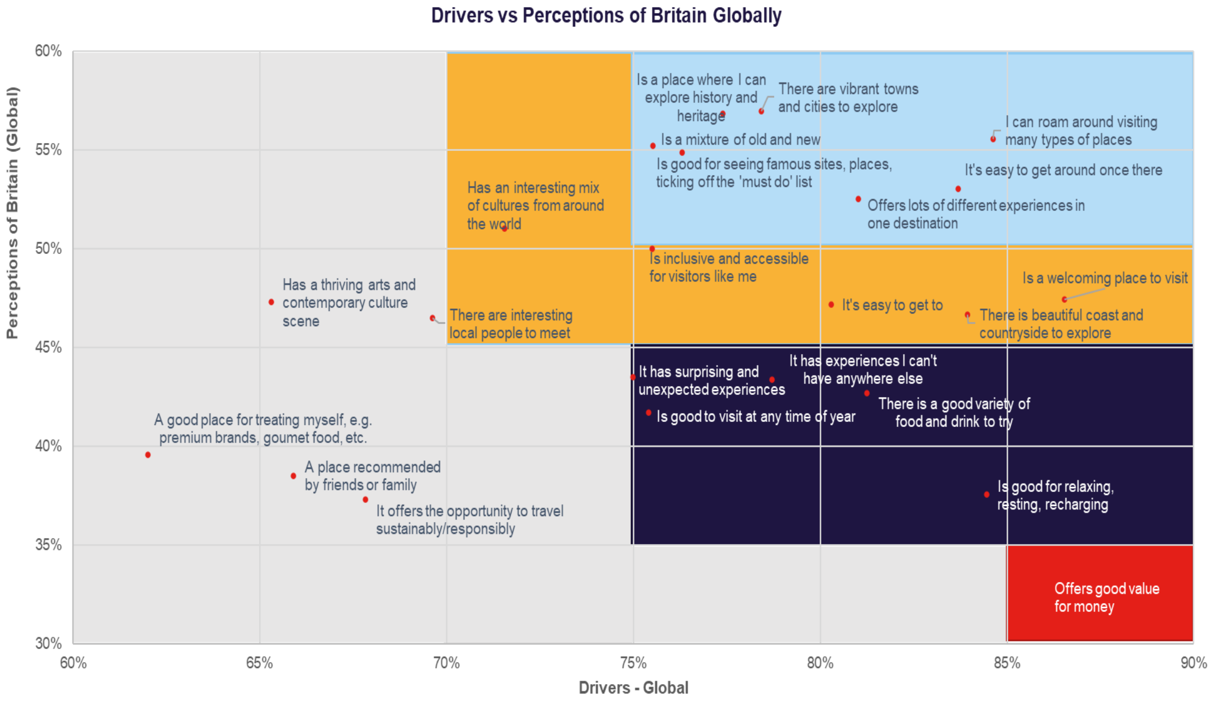
The items in the top right (light blue) are influential attributes which Britain performs well on, such as 'I can roam around visiting many types of places'. In the bottom right (red) we see important attributes Britain performs poorly on, namely value for money. Items on the left are less influential.



E1. Britain perceptions mapped against D3. Drivers for International Tourists; Total base size N=22,840; Global weighting applied

The hierarchy of brand hooks explained

We can therefore pull out 5 categories of attributes, shown in the table on the right, and prioritise our focus on them accordingly.



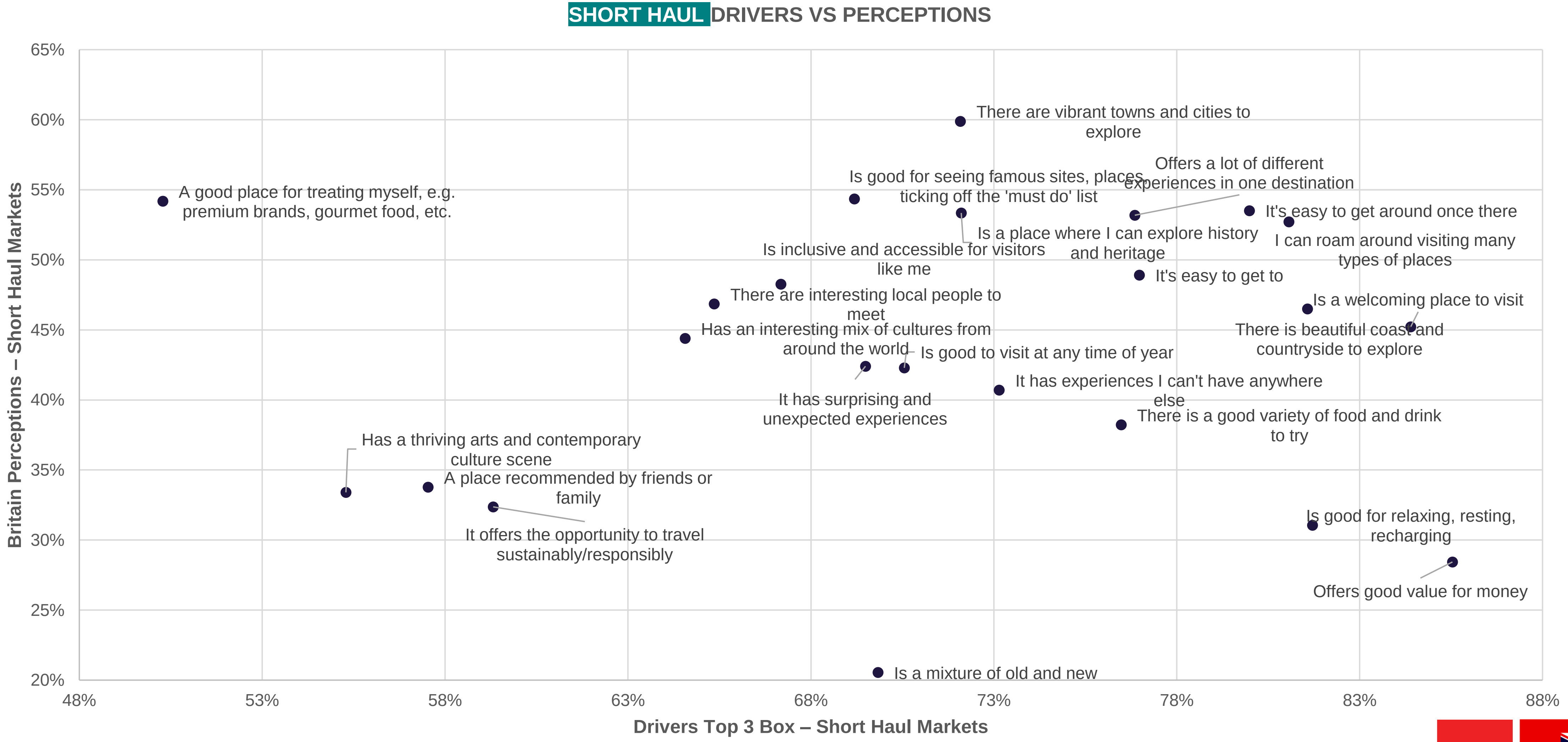
Flex by Market	'BEST IN' FLEXES
Additional Scope to Differentiate	UNIQUE & UNEXPECTED
Seductive Warmth	INVITING WARMTH
Strong Foundation	FREEDOM TO EXPERIENCE
Achilles Heel	POOR VALUE FOR MONEY

What does this mean?

Flex by Market	'BEST IN' FLEXES	We see potential to flex the narrative of brand Britain to different markets and cultures through leveraging elements such as contemporary arts & culture (Japan); food & beverage (India); premium shops & experiences (Saudi & China). Identifying sub-products or destinations that speak to 'best-in' products or experiences will help build a model that can readily flex to these more unique perceptions and needs.
Additional Scope to Differentiate	UNIQUE & UNEXPECTED	Offering unique experiences that are unavailable elsewhere is key to attracting tourists, yet this attribute is only currently associated with Britain by 47% of international tourists. To avoid repeating iconic experiences, there may be scope to leverage other dimensions in this strategic cluster – the unexpected, luxury relaxation experiences, food & drink and seasonal experiences. This may require investment in product development or niche targeting to add to the core brand idea.
Seductive Warmth	INVITING WARMTH	Being welcoming and a place with natural coastal and countryside beauty are strong drivers for tourists, but these also seem strongly aligned to drivers which are slightly less prominent, yet well associated with Britain – interesting mix of cultures, inclusive and accessible as well as interesting locals to meet. These dimensions add considerable emotional warmth to brand Britain, and we anticipate they will become increasingly important over time.
Strong Foundation	FREEDOM TO EXPERIENCE	Our foundation is strong, with perceptions of Britain matching tourists' needs for wanting to roam and explore diverse experiences, both historic and contemporary; iconic and open to discovery. We need to continue to support this core foundation, but there are added elements (see above), we can layer onto this foundation to add desirable levels of complexity, warmth & distinctiveness.
Achilles Heel	POOR VALUE FOR MONEY	The perception of value for money is the most essential to tourists selecting a destination, but Britain's perception is particularly weak here (28% for Short-Haul markets and 37% for Long-Haul). With a recession imminent and cost of goods and services rising in Britain, we need to find ways to create a much stronger perception of value and/or embellish segments to better target different tiers of spend in communication our tourism offer.

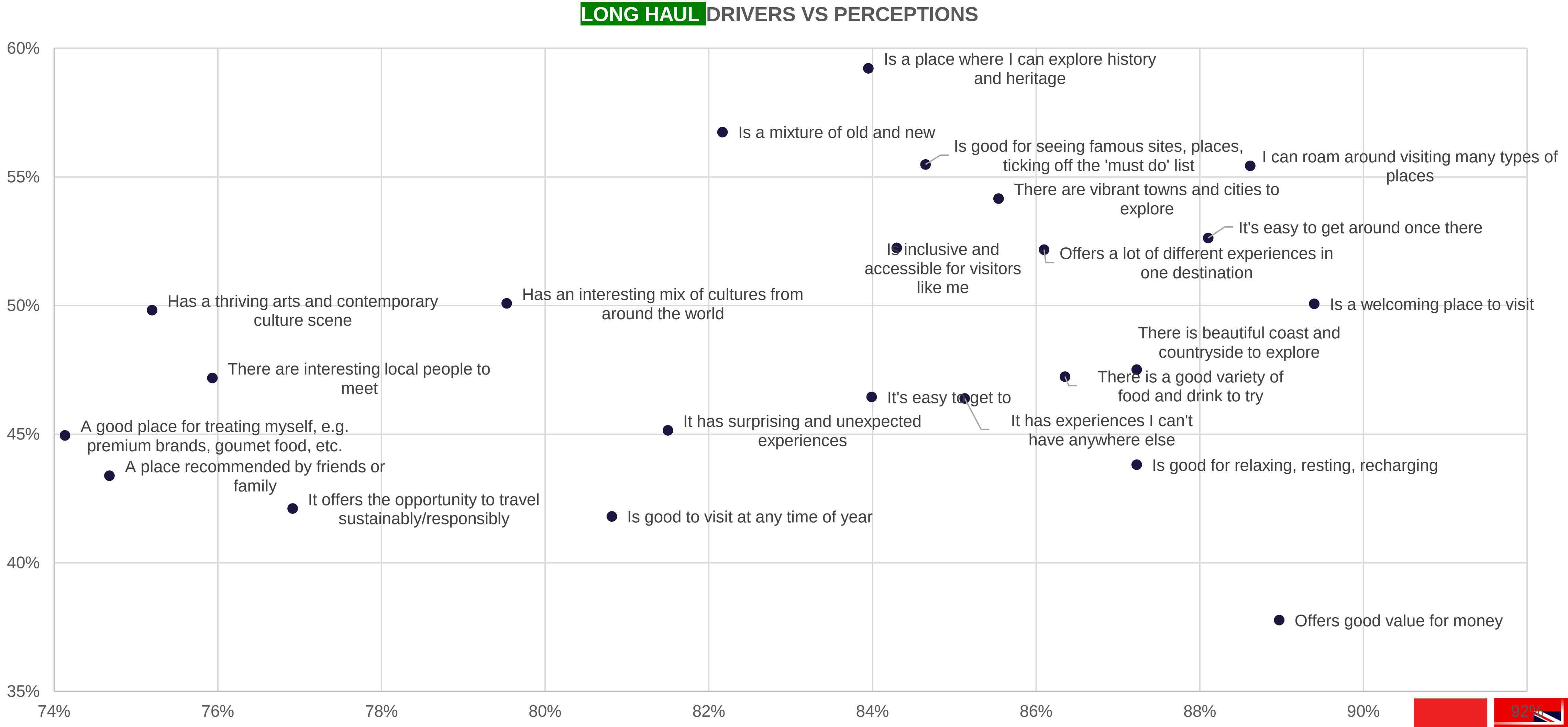
Although the absolute magnitude of drivers and associations changes by market type, the mapped patterns are very consistent

**Results have been checked against other competitors and the results remain the same*



Although the absolute magnitude of drivers and associations changes by market type, the mapped patterns are very consistent

**Results have been checked against other competitors and the results remain the same*



kubi kalloo

VISIT BRITAIN

The combination of mapping motivations against current perceptions of Britain **helps to inform a hierarchy of brand hooks to support our overarching brand idea.**

Whilst the absolute values for both motivations and Britain perceptions differs by segment and between long and short-haul markets, **the position of each statement is relatively consistent across each of the maps**.

This confirms that the hierarchy is **likely applicable *independent* of audience or market differences.**

This view of the world does **NOT currently account for competitor perceptions**, however, so let's now review Britain's perceptions in comparison to the other destinations included as a competitive set in this study.

In Summary

We have used the information from this chapter to develop a hierarchy of brand hooks. These can be used to navigate themes of importance in communicating and activating Britain as a tourism destination.

How does this compare to competitors?
Where are our relative perceptual strengths and weaknesses?

Britain’s competitive strengths lie in its perceived eclecticism, whilst Spain and Italy prove strong competitors on our strongest attributes and Germany and Ireland seem to lag behind

% Association at a Global Level	Britain	France	Germany	Ireland	Italy
Is a place where I can explore history and heritage	57%	54%	45%	46%	58%
There are vibrant towns and cities to explore	57%	53%	45%	41%	56%
I can roam around visiting many types of places	56%	52%	44%	46%	55%
Is a mixture of old and new	55%	50%	43%	42%	54%
Is good for seeing famous sites, places, ticking off the 'must do' list	55%	54%	39%	38%	56%
It's easy to get around once there	53%	44%	43%	34%	42%
Offers a lot of different experiences in one destination	53%	48%	39%	40%	51%
Has an interesting mix of cultures from around the world	51%	40%	33%	28%	38%
Is inclusive and accessible for visitors like me	50%	43%	41%	41%	46%
It's easy to get to	48%	46%	46%	34%	46%
Is a welcoming place to visit	48%	40%	36%	45%	51%
Has a thriving arts and contemporary culture scene	47%	51%	35%	29%	49%
There is beautiful coast and countryside to explore	47%	49%	27%	53%	56%
There are interesting local people to meet	47%	41%	37%	48%	49%
It has surprising and unexpected experiences	44%	40%	35%	41%	43%
It has experiences I can't have anywhere else	44%	42%	34%	42%	46%
There is a good variety of food and drink to try	43%	54%	38%	35%	60%
Offers experiences I want to share on social media	42%	41%	34%	35%	43%
Is good to visit at any time of year	42%	41%	35%	31%	47%
A good place for treating myself, e.g. premium brands, gourmet food, etc.	40%	52%	30%	23%	50%
A place recommended by friends or family	39%	35%	27%	28%	41%
Is good for relaxing, resting, recharging	38%	43%	31%	39%	51%
It offers the opportunity to travel sustainably/responsibly	38%	34%	35%	30%	34%
Offers good value for money	33%	30%	31%	29%	39%
If I don't visit soon, I'd miss out	27%	23%	20%	20%	26%

Legend:
- 1st rank
- 2nd rank
- 3rd rank
- Lowest rank

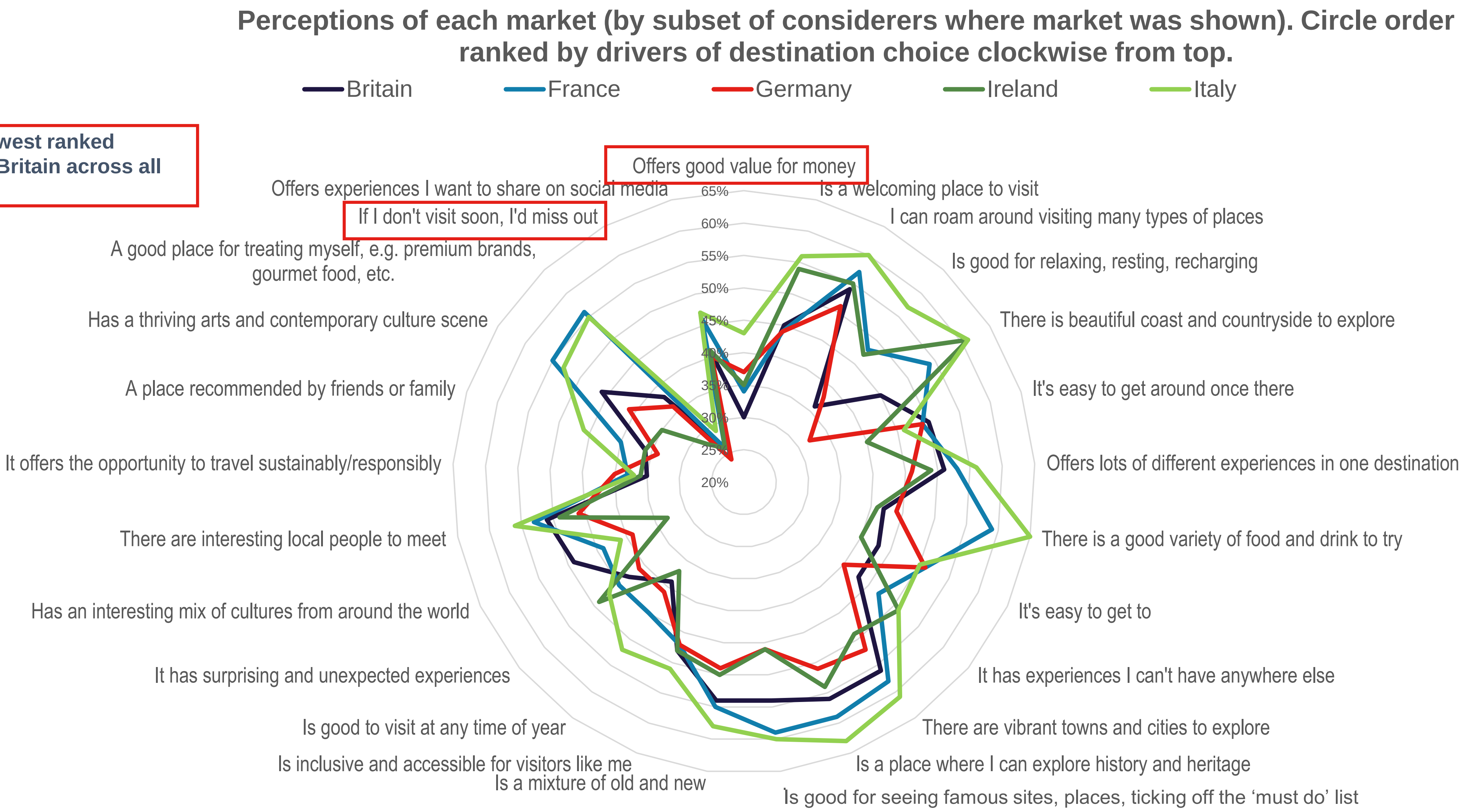
CAUTION! *Respondents from different markets use scales differently. Rather than comparing percentages, we encourage the comparison of the rank order*

CAUTION! *Different competitors were shown for each market and this particular page compares ALL results, where the Britain base is all considerers, but other markets includes non-considerers of that market*

E1. Below, are some statements which may relate to destinations you might consider for a break or holiday abroad.
Please indicate which destinations you associate with the following statements. You can choose as many or as few as you like for each statement or select ‘none of these’ if you don’t think it applies to any destination.; global weighting applied (IPS value). Base sizes 21,896, 1622, 20576, 19796, 12,131, 20719, 3,527, 6,542

Comparative strengths and weaknesses can also be visualised in this format which may be simpler to read

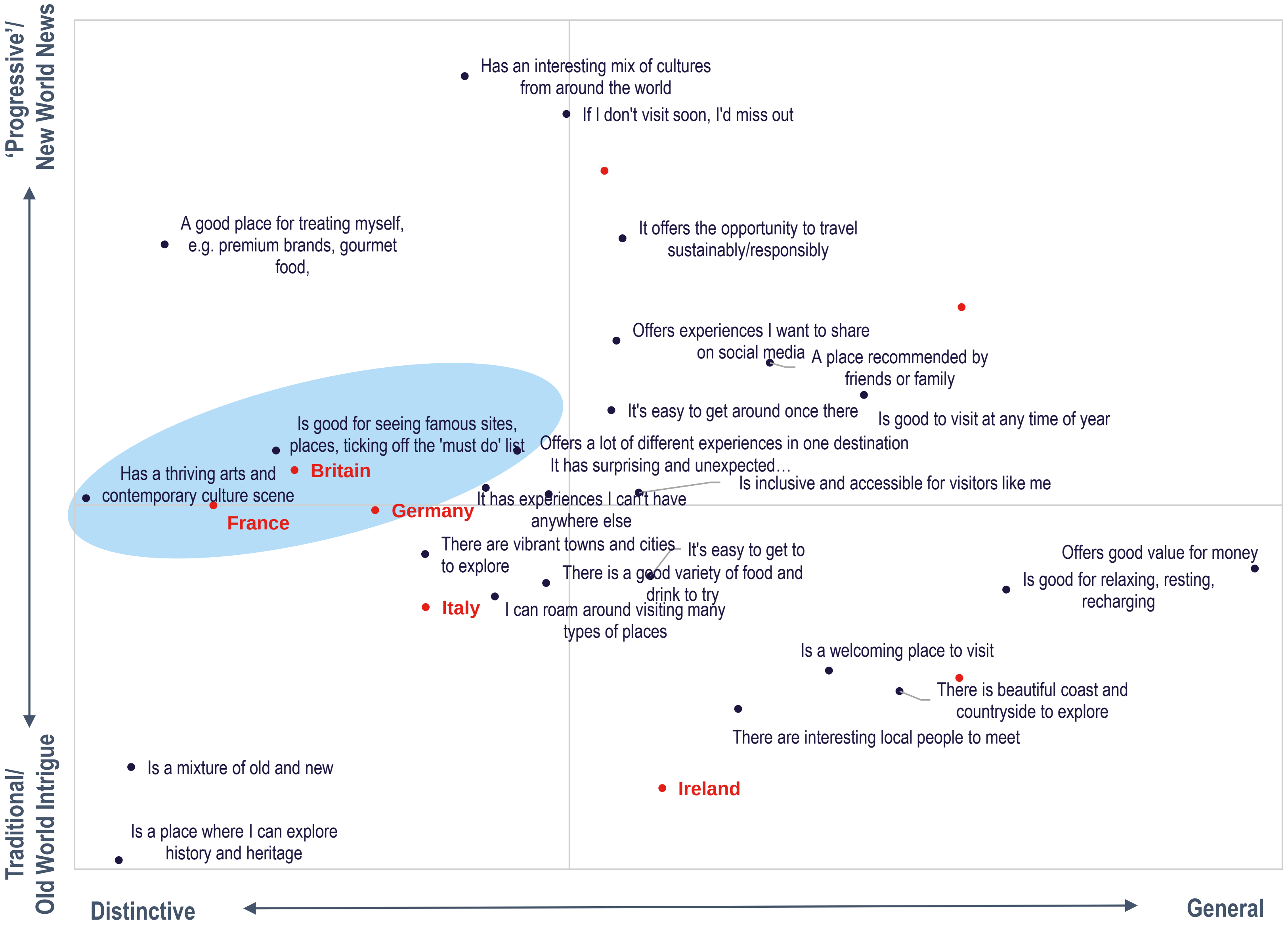
Denotes lowest ranked scores for Britain across all markets



E1. Below, are some statements which may relate to destinations you might consider for a break or holiday abroad.
Please indicate which destinations you associate with the following statements. You can choose as many or as few as you like for each statement or select 'none of these' if you don't think it applies to any destination.; Bases global weighting applied (IPS value). Base sizes considerers 21896 1386, 15668, 13216, 8036, 6077, 4766

When we look at <u>relative</u> differences beyond those shared by all markets, we see that Britain can really own unique 'must do' experiences, but also competes strongly for arts & culture alongside France

This chart is a correspondence map which pulls the most *unique* associations apart visually. The two statements highlighted by the blue circle are the ones that most uniquely separate Britain (and France) from other competitors, even though they may not be the largest overall in terms of association with Britain.



E1. Below, are some statements which may relate to destinations you might consider for a break or holiday abroad.
Please indicate which destinations you associate with the following statements. You can choose as many or as few as you like for each statement or select 'none of these' if you don't think it applies to any destination.; Bases vary from n= 1627 to N=22,840; global weighting applied (IPS value). Correspondence analysis to separate shared associations from unique ones.

Synthesising four important questions to inform future brand strategy

01 What are the most motivating drivers for international tourists?

02 What are the strongest perceptions Britain owns today?

03 Which of these perceptions are strong versus competitors?

04 Which are *unique relative* strengths versus competitors?

Answering the four questions at a global level

The following summarises the learnings under each of the four questions. Statements which are common answers to 2 or more of the four questions posed are highlighted, with the darker blue highlights showing statements that appear as answers to 3 of the 4 questions.

Common answer to 3 of the 4 questions	Common answer to 2 of the 4 questions

01 What are the most motivating drivers for international tourists?

Offers good value for money
Is a welcoming place to visit
I can roam around visiting many types of places
Is good for relaxing, resting, recharging
There is beautiful coast and countryside to explore
Is easy to get around once there

02 What are the strongest perceptions Britain owns today?

There are vibrant towns and cities to explore
Is a place where I can explore history and heritage
I can roam around visiting many types of places
Is good for seeing famous sites, places, ticking off the 'must do' list
Is easy to get around once there

03 Which of these are strong versus competitors?

Is a mixture of old and new
Offers a lot of different experiences in one destination
Has an interesting mix of cultures from around the world
Is a place where I can explore history and heritage
There are vibrant towns and cities to explore
I can roam around visiting many types of places

04 Which are *unique relative* strengths versus competitors?

Has an interesting mix of cultures from around the world
Is a mixture of old and new
Is a place where I can explore history and heritage
Is easy to get around once there
Is good for seeing famous sites, places, ticking off the 'must do' list
Has a thriving arts and contemporary culture scene

When we take our competitors into account, we note much stronger competition, particularly from **Italy.**

At the same time, different competitors were shown to different markets, so it will be important to look at relative strengths at a market-by-market level (provided in data tables).

Despite this, what is definitive is that **Britain has the weakest scores on both value for money, as well as a place for relaxing, resting and recharging**. Both require focussed attention given these are both key drivers of destination choice.

Perhaps more uniquely, Britain has the potential to dial up two particularly unique perceptions – a place to **tick things off the 'must do' list, and a thriving arts and contemporary culture scene**, particularly for younger or first-time visitors.

In Summary

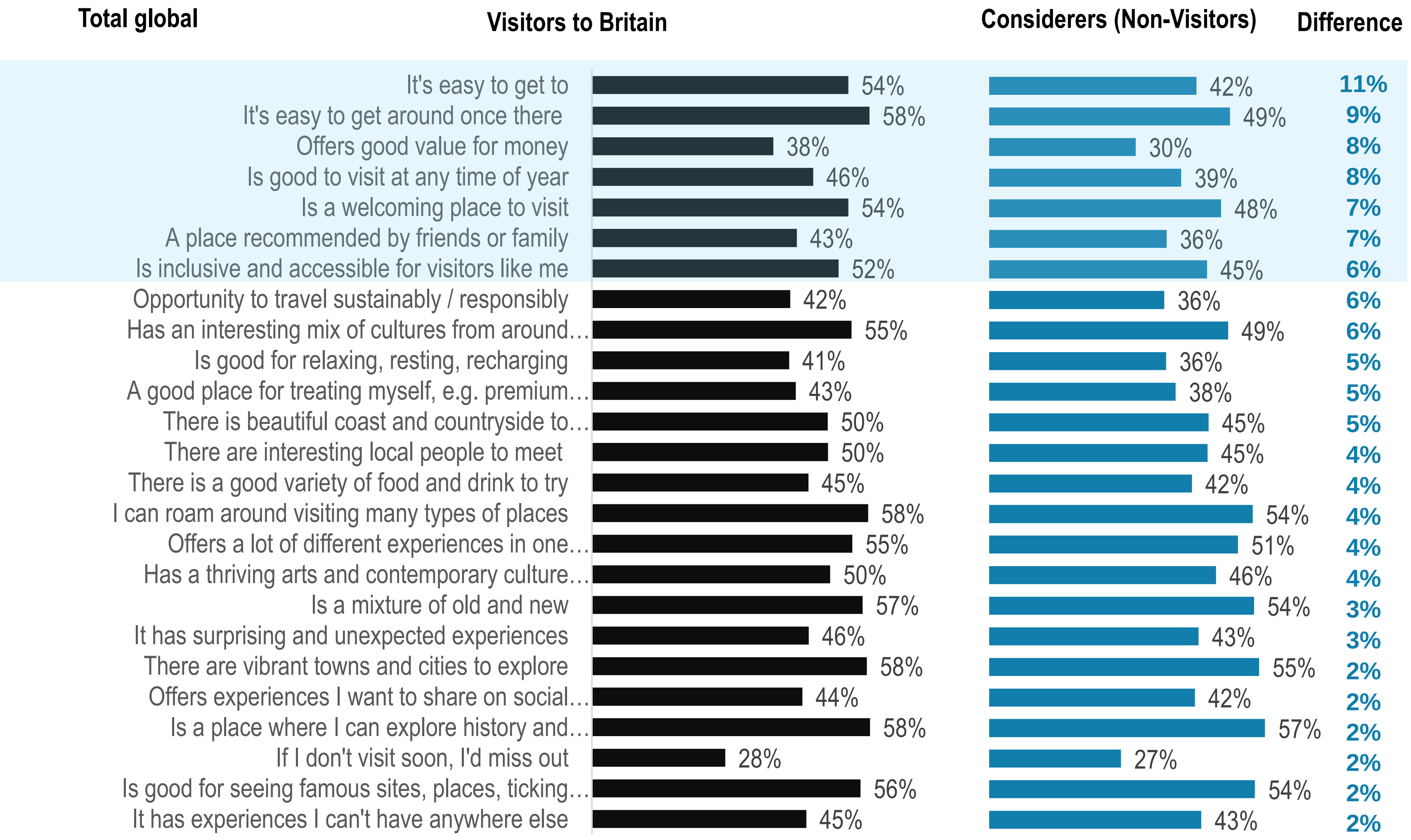
Competitor comparison reveals the depth of challenge around value for money and a place for resting/relaxation, both of which are key drivers of destination choice and require urgent attention

How do perceptions compare to the experience of visiting Britain?

What can we learn from looking at how visitors perceive Britain versus considerers?

Visitors to Britain are much more likely to perceive Britain as being convenient, good value for money, good to visit at any time of the year and welcoming, than those who have considered but not visited Britain

Associations with Britain – (global)



Ease of getting to is not considered especially differently by long and short haul markets!	Long haul	Short haul
It's easy to get to (visitors)	52%	56%
It's easy to get to (non visitors)	42%	44%
Gap	+10	+13

Suggested areas to leverage or perceptions to overcome are strongly linked to COMFORT – logistically easier than expected and emotionally warmer. Both are likely to be increasingly important in a post-pandemic world.

E1: Below, are some statements which may relate to destinations you might consider for a break or holiday abroad. Please indicate which destinations you associate with the following statements. Bases: Visitors: N=8,497; Considerers N=14,343; global weighting applied

The most significant impact of visitation on perceptions is observed within the Middle East where advocacy is also observed to be high

Difference in perceptions of Britain between visitors to Britain and non visitors to Britain by region (Most significant differences shown)

Visitors to Britain from MIDDLE EAST	
Good variety of food and drink to try	+15
Good to visit at any time of year	+15
Easy to get to	+13
Beautiful coast and countryside to explore	+13
Interesting local people to meet	+13
Interesting mix of cultures from around the world	+12
Offers good value for money	+12
Easy to get around once there	+12
Offers experiences I want to share on social media	+12
Has surprising & unexpected experiences	+12
A place recommended by friends or family	+12
Is a welcoming place to visit	+12
Is inclusive and accessible for visitors like me	+11
Good for relaxing, resting, recharging	+10
Has a thriving arts and contemporary culture scene	+10
Has experiences I can't have anywhere else	+10
Is a mixture of old and new	+10

Visitors to Britain from OCEANIA	Diff
Good for relaxing, resting, recharging	+11
Offers good value for money	+10
It's easy to get around once there	+8
Has a thriving arts and contemporary culture scene	+8
It's easy to get to	+7

Visitors to Britain from EUROPE	
It's easy to get to	+13
It's easy to get around once there	+11
Is a welcoming place to visit	+8
Is good to visit any time of the year	+8

Visitors to Britain from AMERICAS	
Offers good value for money	+11
A place recommended by friends & family	+9
Is good to visit at any time of year	+8
It's easy to get to	+8

Visitors to Britain from ASIA	
It's easy to get to	+12
Offers good value for money	+10
There are interesting local people to meet	+10

Notably, weak perceptions of value for money are overturned when we speak to visitors from the Middle East, Oceania and Asia.

E1: Below, are some statements which may relate to destinations you might consider for a break or holiday abroad. Please indicate which destinations you associate with the following statements.

Visitors present a strong opportunity to improve perceptions around our weakness of value for money and foundational brand building blocks

Flex by Market	**'BEST IN' FLEXES**	Less apparent through visitation. Visitors' perceptions do not improve significantly after visiting.
Additional Scope to Differentiate	**UNIQUE & UNEXPECTED**	Less apparent through visitation. Visitors' perceptions do not improve significantly after visiting.
Seductive Warmth	**INVITING WARMTH**	Being **welcoming and having positive advocacy** from others is a further benefit that visitor stories and experiences can offer.
Strong Foundation	**FREEDOM TO EXPERIENCE**	**Ease and fluidity, including the opportunity to visit as, and when desired**, is another area strengthened through visitor perceptions.
Achilles Heel	**POOR VALUE FOR MONEY**	**We see stronger perceptions of being value for money arise post visitation**, *however,* this figure is still only 38%, so continues to be a weakness for Britain.

06 Products & Experiences:
Different types of holidays and breaks demand different products and experiences

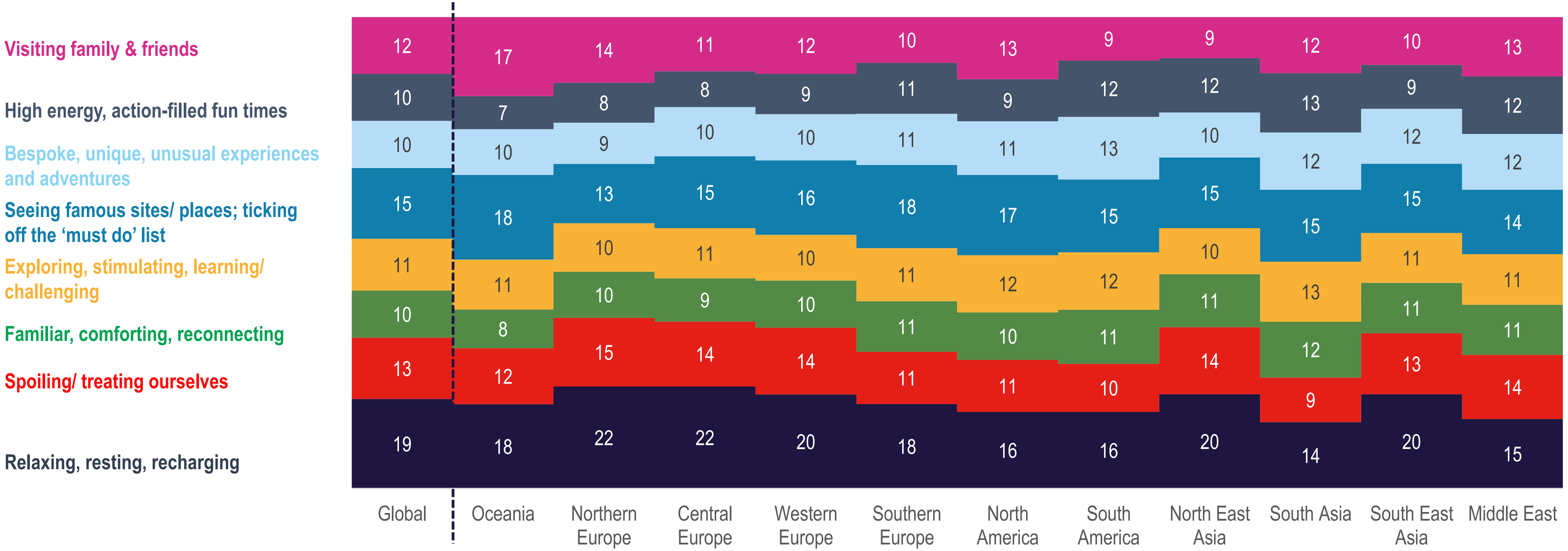
What do tourists want to do on their breaks/holidays?

And what does this mean for Britain?

We see different energies across regions when it comes to preference for different types of leisure breaks

The following chart illustrates the proportionate mix (by column) of holiday/vacation types by region and use this, in combination with other stated motivations to summarise implications later in this chapter. Within country, these differences are even stronger.

Mix (Column % Share) of Preferred Leisure Holiday/Break Types by Region



D1. There are many different types of *holidays and leisure breaks that people like to take.
We have created a list of different types of holidays based on their overall mood and the motivations people have told us about.
We would like you to imagine you have 100 points you can allocate across the different holiday types based on your preference when it comes to leisure breaks and holidays in the next two years.
Please allocate the 100 points across the different holiday types – the number at the bottom will automatically add so you can see how many points are left for you to allocate.

Very marginally, social and cultural activities are most distinctively sought when visiting Britain

The fact that these differences are, perhaps, smaller than anticipated, however, suggests that tourists **desire a wide variety of products and experiences *independent* of their chosen destination.**

DESIRED EXPERIENCES FOR TRIPS TO…. (Top 3 Box interest)	Britain	Abroad (excl. Britain)	DIFF
Experience coastal places and scenery	68%	70%	-2%
Explore local food and beverage specialties	68%	70%	-2%
Visit famous/iconic tourist attractions and places	65%	64%	1%
Explore history and heritage (historical sites, architecture)	64%	61%	2%
Visit parks and gardens	58%	56%	2%
Experience rural life and scenery	58%	58%	0%
Experience city life	58%	55%	3%
Enjoy outdoor walks, hiking or cycling	55%	56%	-1%
Visit famous shops or shopping streets/centres	54%	52%	2%
Visit museums or galleries	54%	51%	3%
Enjoy fine dining experiences	52%	52%	1%
Attend a cultural/historical exhibition or event	52%	49%	3%
Guided tours/day excursions	50%	48%	1%
Socialising with locals	49%	48%	1%
Visit zoos, aquariums, and wildlife parks	48%	50%	-2%
Self-driving tours	47%	47%	-1%
Experience pubs, bars and clubs	46%	43%	3%
Attend a live music festival/event	45%	44%	1%
Visit literary, music, film and TV locations	44%	41%	3%
Participate in action and adventure experiences	42%	42%	1%
Visit a winery (e.g. wine tasting/ vineyard tour)	42%	42%	0%
Visit theatre, opera, ballet or musicals	40%	37%	3%
Visit a brewery or distillery	40%	38%	1%
Attend a sporting event	36%	34%	2%
Participate in wellness activities such as yoga, etc.	32%	33%	-1%
Attend a learning course (cooking, language etc)	31%	31%	0%
Participate in sport (golf, football, etc.)	29%	29%	0%
Volunteering	25%	26%	0%

D2. Below, are a list of things you might like to do when taking a break or holiday abroad. Top 3 Box scores indicated on 10-point interest scale
Please indicate how much you might like to do each on a break or holiday in Britain
Please indicate how much you might like to do each on a break or holiday abroad
Split sample randomly into Britain and Abroad. Bases: Britain n=10,764; Abroad n10,767; global weighting applied

When it comes interest in specific products and tourism experiences, we can identify five key clusters

PARTICIPATION/DOING
Participating in sport
Volunteering
Wellness activities
Learning courses
Sporting events
Action & adventure experiences
Live music festivals/events
Zoos, aquariums, wild-life parks

OUTDOORS & LOCAL
Experience rural life & scenery
Coastal places and scenery
Outdoor walks, hiking, cycling
Visiting parks & gardens
Exploring local food & beverage
Socialising with locals
Self-driving tours

CULTURE
Visit museums/galleries
Attend cultural/historic exhibition/event
Visit theatre, opera, ballet, musicals
Visit literary, music, film & TV locations

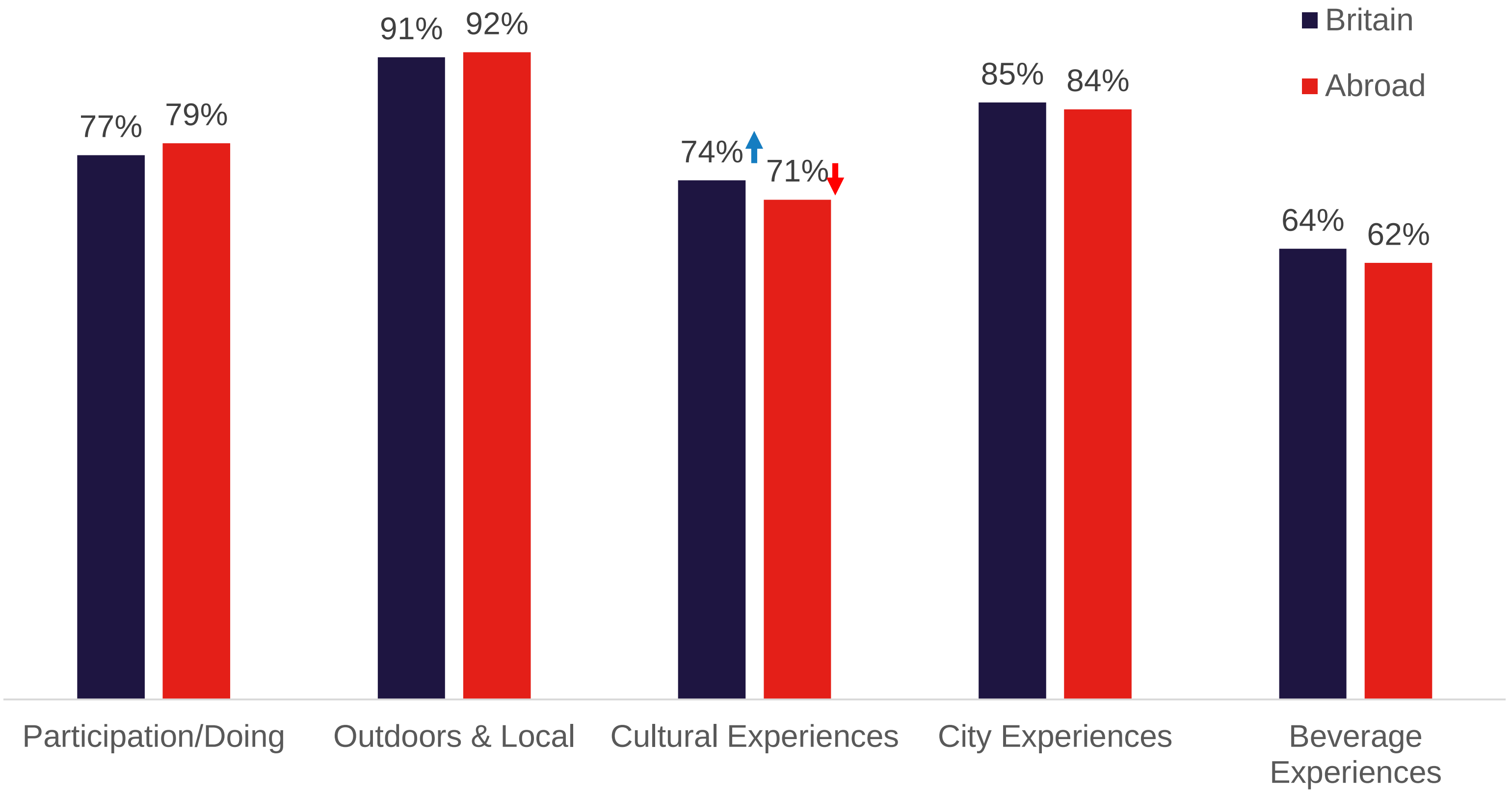
CITY EXPERIENCES
Visit famous shops/ shopping areas
Experience city life
Visit famous/iconic tourist attractions & places
Enjoy fine dining

BEVERAGE EXPERIENCES
Visit a brewery/distillery
Visit a winery
Experience pubs, bars, clubs

D2. Factor analysis results conducted on global base N=22,840 unweighted:
Below, are a list of things you might like to do when taking a break or holiday abroad.
WORDING FOR CELL 1: Please indicate how much you might like to do each on a break or holiday in Britain
WORDING FOR CELL 2: Please indicate how much you might like to do each on a break or holiday abroad

Outdoor and Local Experiences are most desirable for international tourists generally, whilst Cultural Experiences are more strongly desired in Britain relative to other destinations

Top priorities for a break in Britain versus a break in another destination (% stating 'want to do')



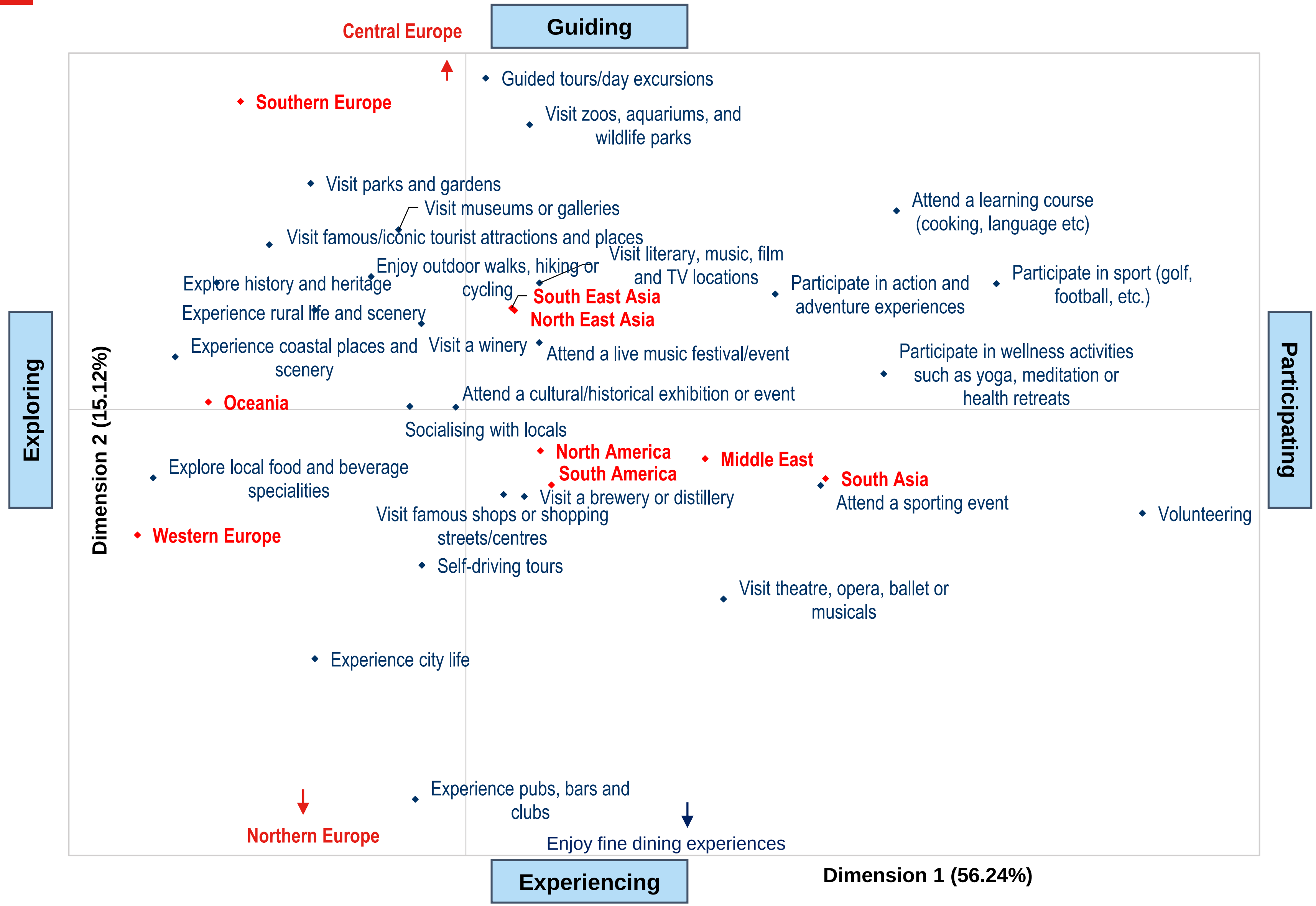
Outdoor and Local Experiences are most in demand, followed by city experiences.

At a global level, Outdoor and Local Experiences skew to Adventurers (94%) and Experience Seekers (94%), whilst City Experiences skew to Experience Seekers (89%), Sightseers (86%) and Cultural Buffs (86%).

D2. Factor analysis results:Below, are a list of things you might like to do when taking a break or holiday abroad. Please indicate how much you might like to do each on a break or holiday in Britain/Abroad
Please indicate how much you might like to do each on a break or holiday abroad

Higher than comparative column @ 95% (colours may change for optimal visibility)
Lower than comparative column @ 95% (colours may change for optimal visibility)

There are regional differences to note, however, which align to desired holiday patterns



More distinctive patterns include:

- **Northern Europeans** more drawn towards food & beverage and city experiences
- **Western Europeans** and **Oceania** visitors enjoying 'localised' offers, including costal and rural experiences
- **Southern** and **Central Europeans** happy to fulfil more traditional 'touristic' activities
- **Indian** visitors strongly aligned to sporting event attendance
- **South & North-East Asian** visitors enjoy being at the heart of experiences they've seen or heard about, particularly when it comes to culture, arts & music
- **North and South Americans** are less differentiated than other tourists, favouring a greater range of activities

D2. Correspondence map illustrating interest in activity types by region – relative differences mapped
Arrows indicate regions or activities beyond the current perimeter of the map, showing direction of their placement

The holiday types taken by tourists vary by region and segment, as does **interest in different products and experiences.**

When viewed in aggregate, these differences look quite subtle, but this is because tourists are **hungry for a combination of experiences** on any international holiday or break. This is important to keep in mind, as it suggests that destinations which provide variety and itineraries that allow for diverse activity combinations will do well.

The subtle differences in these patterns can also be used to identify **clear product development and marketing opportunities** to captivate different traveller types. Whilst exploration of coastal places and scenery have the highest shared demand from tourists, visitors to Britain have a **higher interest in cultural activities** and a desire to experience city life, including food and beverage experiences.

We also note, however, that **interest in products and services varies by market**, so this level of information will be key in communicating to and connecting with different cultures.

This information can be **used as a proxy to estimate desire** for any combination of product experiences or offers by market or targeted segment.

In Summary

There are subtle, but important nuances in terms of desired holiday types and products that fulfil them by both region and segment

07 The Visitor Experience
What can we learn about visitation behaviour, experiences and impact relative to competitors?

Definitions and constraints

We typically ask about recent international travel behaviour (i.e., within the past 2 years) to gain a sense of visitation patterns.

Given the limitations on global travel during the pandemic, we felt it was necessary to expand this time-frame to include visitation to international leisure travel within the past 5 years.

Samples were boosted to ensure we had a solid base of minimum n=200 GB visitors per market for profiling. Final base sizes of visitors are shown below.

AUS	AUT	BEL	BRA	CAN	CHI	DNK	FRA	DEU	HKG	IND	IRE	ISR	ITA	JAP	NLD	NZL	NOR	POL	SAU	SEA	KOR	ESP	SWE	SWZ	UAE	USA
383	203	263	251	329	345	239	342	302	261	446	513	234	285	304	274	252	250	259	278	298	316	384	259	222	284	721

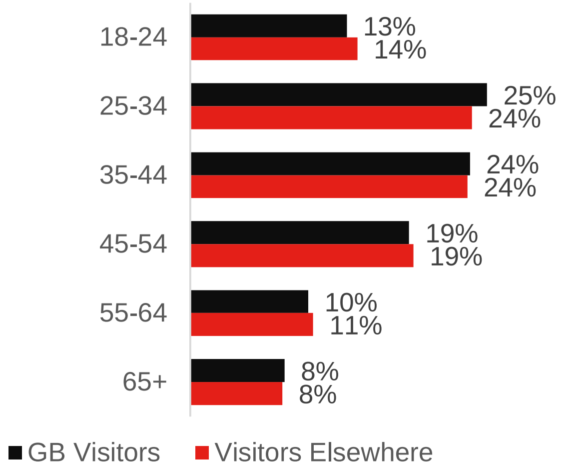
Throughout this chapter, we sometimes compare visitation to Britain with visitation to other international tourist destinations.

The latter includes the full range of possible markets which are deemed to be ‘long-haul’ or ‘short-haul’ possibilities, depending on the market. As such, it is difficult to compare visitation to any single market, so, instead, we compare to recent international leisure breaks or holidays *generally.*

Section F; introduction differs for GB Visitors: “The following questions refer to your most recent leisure break or holiday to Britain”;
F1. The following questions relate to this most recent holiday or break to Britain/Abroad (depending on routing)

The profile of visitors to Britain in the past 5 years shows a higher proportion of Experience Seekers (a priority segment) and more affluent visitors than those visiting elsewhere

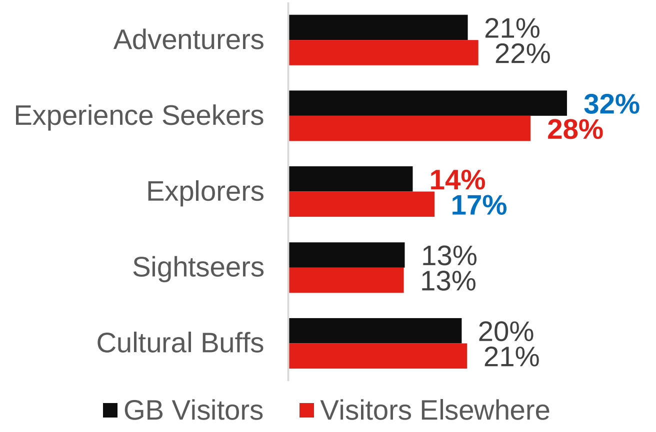
AGE PROFILE:



GENDER

	GB Visitors	Visitors Elsewhere
Male	51%	48%
Female	48%	51%
Other response*	<.5%	<.5%

SEGMENT:



FINANCIAL SELF-ASSESSMENT:

£

£££

	GB Visitors	Visitors Elsewhere
Constantly struggle to make ends meet, so can't always afford to do what we'd love to do	15%	15%
Have a lot to cover with our income/savings, so an international trip requires a lot of saving and planning	27%	32%
Fortunate to be able to take breaks/holidays abroad with a bit of planning	42%	42%
Lucky to not have to worry about finances, so we are able to splash out on trips abroad as I/we wish	16%	12%

There are no significant differences when it comes to life-stage, LGBTQIA+ identity or accessibility needs between Britain Visitors and those who are Visitors Elsewhere

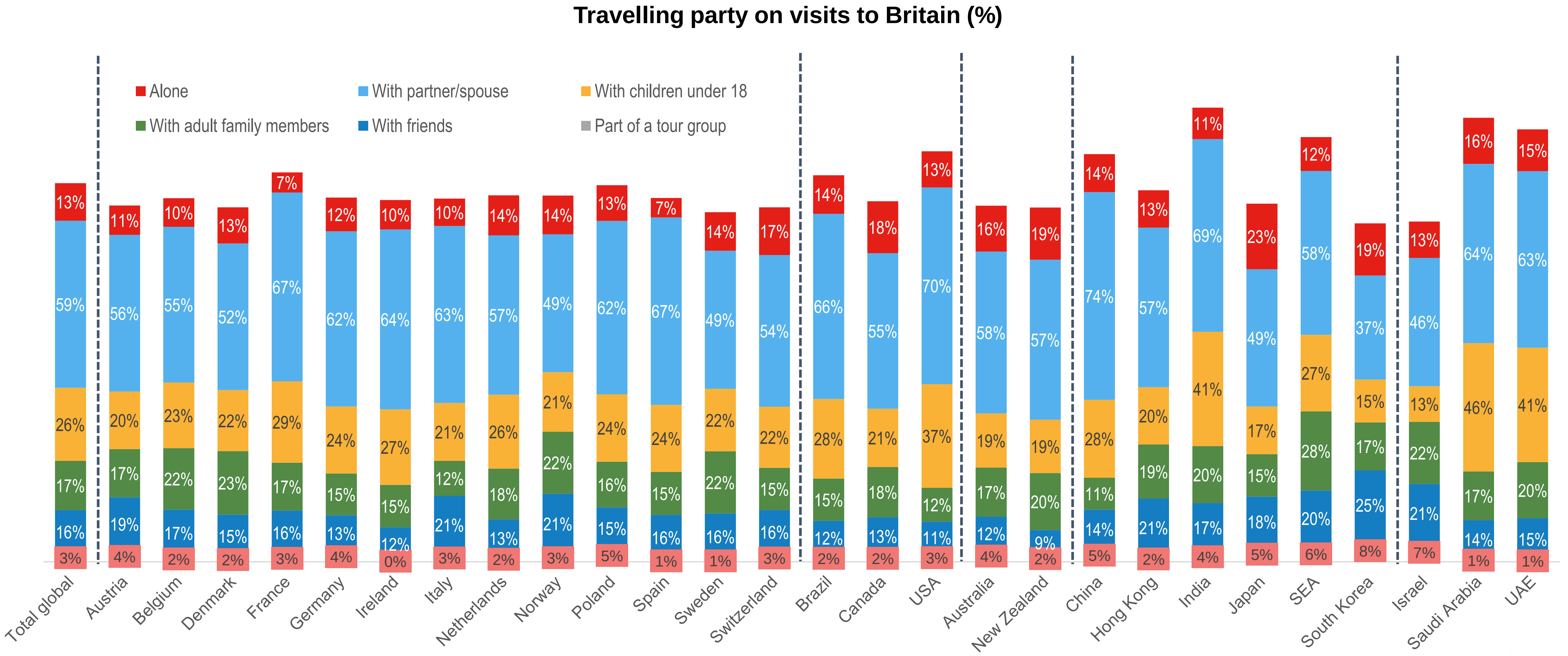
*The **self assessment of affluence** is used as income is not readily comparable across markets, nor is it a particularly good proxy for tourism spend.*

*Attracting a **more affluent tourist** is in-line with the low perceptions of Value for Money we have already observed.*

A2. Please tell us how old you are
A3. Which of the following gender classifications best describes you? (*Other response includes "I prefer to be described in another way" and "Prefer not to say")
J3 Which of the following best describes your current financial situation when it comes to things like taking leisure breaks or holidays like the ones we have been asking about today?
Segments based on section B as per global algorithm; Base sizes: GB Visitors n=8,497; Visitors Elsewhere n=9,662

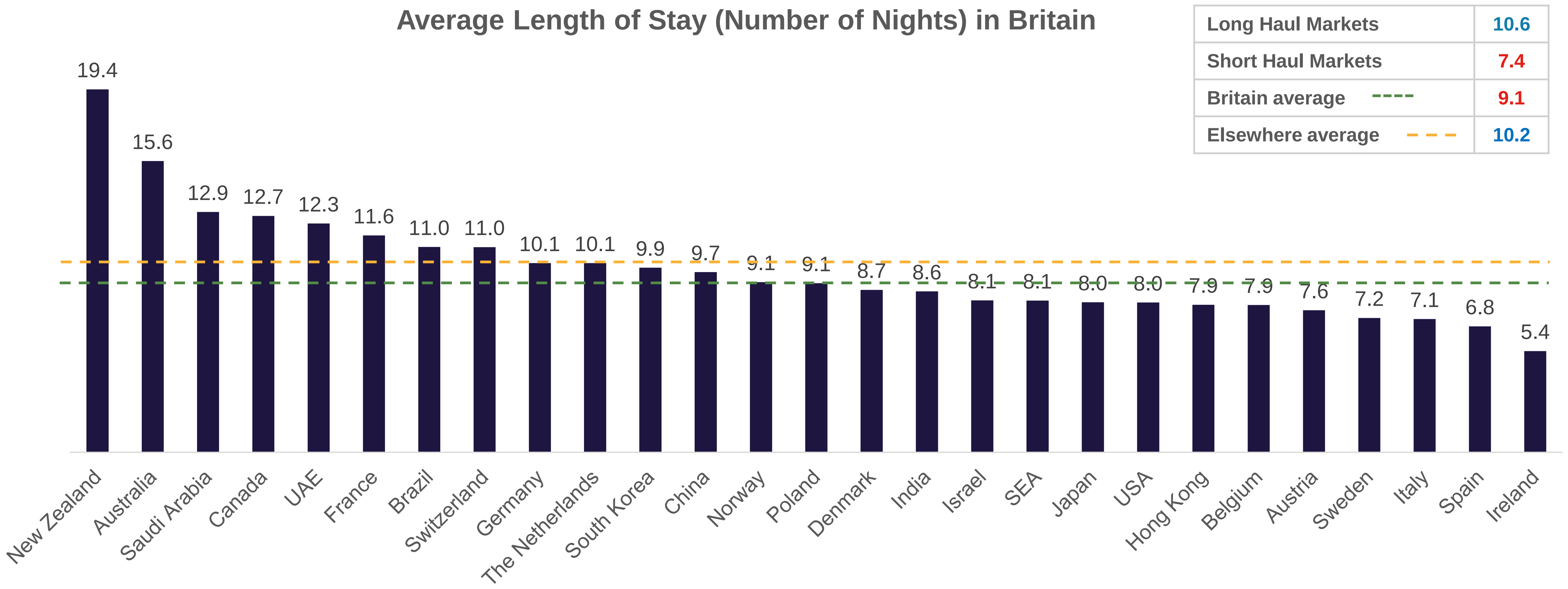
Blue = significantly higher than comparative cell @ 95% confidence
Rad = significantly higher than comparative cell @ 95% confidence

Travelling to Britain as a couple is most common, although visitors from Saudi, UAE, India and USA are most likely to visit with children



F2: And on this particular break or holiday which of the following best describes who you were travelling with?
Base is Britain visitors; N=8,497; Global weighting applied; Significance testing is removed to make the chart readable
Respondent can choose more than one answer hence the percentages add up to more than 100%

As expected, the longest stays in Britain come from the long-haul markets, although travellers to Britain stay one night fewer on average than those to other destinations



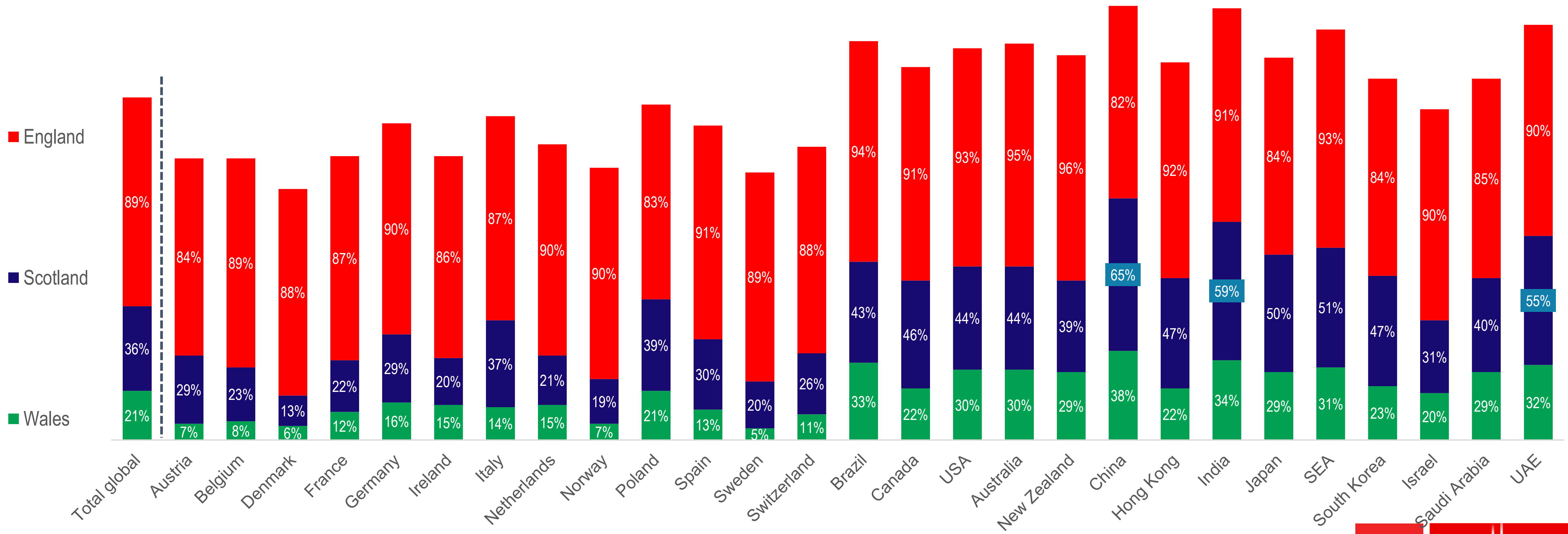
Long Haul Markets	10.6
Short Haul Markets	7.4
Britain average	9.1
Elsewhere average	10.2

F4. And how many nights did you stay away?
Bases Britain n=8,497; Elsewhere n=9,662

Long-haul tourists are more likely to visit multiple nations within Britain in the same trip. England is obviously the most popular country across markets, but Scotland sees very high visitation from China, India and UAE where multiple country visits in Britain are more common

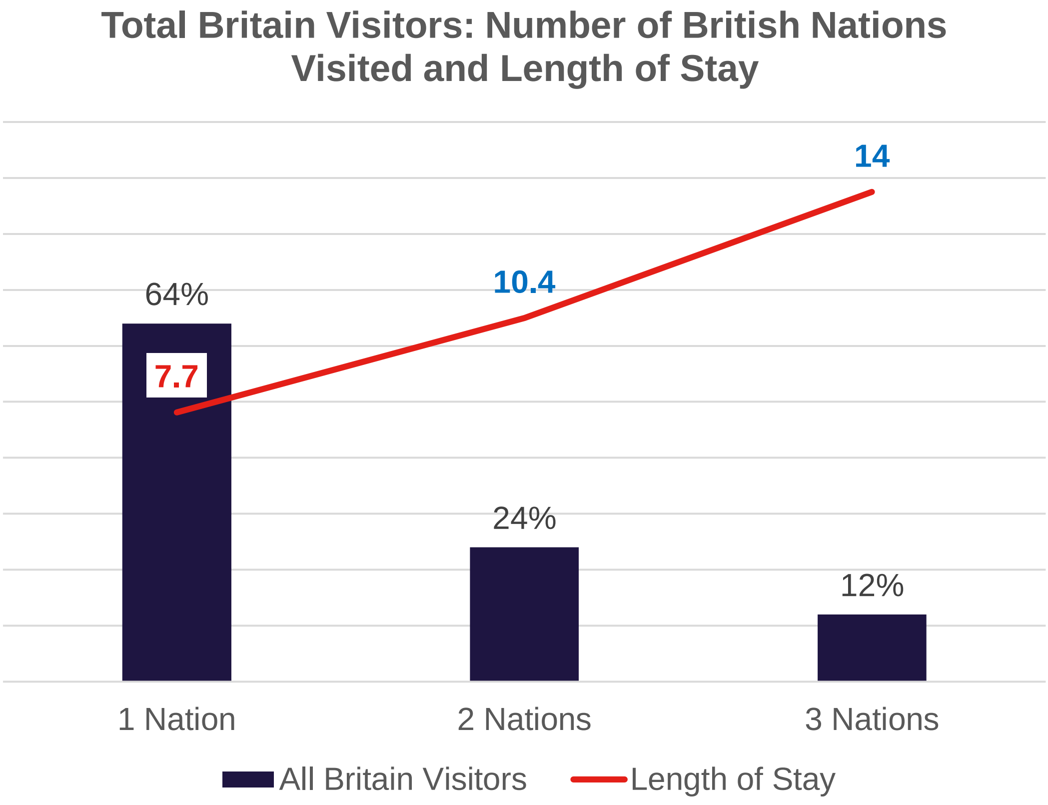
Countries Visited in Britain

Visited a single country in GB	64%	82%	82%	92%	80%	71%	76%	68%	79%	86%	66%	72%	87%	74%	49%	53%	50%	52%	53%	43%	53%	34%	50%	47%	58%	68%	59%	43%
Visited multiple countries in GB	36%	17%	18%	7%	19%	28%	22%	31%	21%	13%	33%	28%	12%	24%	51%	46%	50%	48%	46%	57%	46%	65%	48%	53%	41%	30%	41%	57%



F7a: Please tell us which of the following countries you visited during your trip to Britain?
Base is Britain visitors; n=8,497 Blue highlights show extremely high and worthy of calling out separately

Adding within-Britain travel to one's trip can almost double the length of stay, delivering a strong accretive revenue opportunity

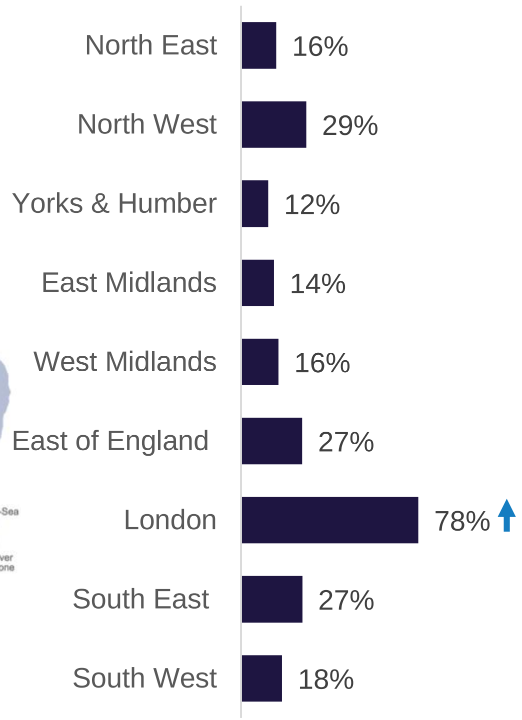


F7a: Please tell us which of the following countries you visited during your trip to Britain?
Base Britain visitors n=8,497
Blue highlights are significantly higher; red significantly lower

London is clearly the most popular destination in England. Visitors from India (South Asia) visited more places across England with fewer travelling to London

Places visited in England

Total global visitors



	Oceania	North Europe	Central Europe	West Europe	South Europe	North America	South America	North East Asia	South Asia	South East Asia	Middle East
North East	16%	5%	9%	6%	7%	22%	22%	26%	31%	23%	25%
North West	32%	13%	17%	20%	19%	36%	46%	41%	48%	47%	38%
Yorks & Humber	24%	4%	8%	7%	8%	13%	19%	15%	21%	14%	16%
East Midlands	18%	4%	8%	6%	6%	19%	17%	23%	31%	29%	25%
West Midlands	22%	6%	8%	11%	11%	20%	16%	25%	37%	27%	22%
East of England	27%	14%	14%	11%	20%	30%	32%	51%	47%	41%	43%
London	79%	79%	82%	73%	90%	75%	92%	81%	66%	81%	74%
South East	37%	12%	22%	17%	24%	31%	29%	40%	48%	32%	30%
South West	32%	7%	16%	12%	12%	22%	18%	23%	27%	24%	19%

**Due to differences in sample and methodology, results may differ from the International Passenger Survey.*

F7a: Please tell us which of the following countries you visited during your trip to Britain?
Base GB visitors; n=8,497
Red numbers significantly lower than total @95%; blue numbers significantly higher; blue arrows used to highlight disproportionate total skew

The vast **majority of trips to Britain are taken with partners/spouses**, although trips with children are more popular, particularly for Indian, Saudi Arabian and Emirati visitors.

Tourists from New Zealand and Australia enjoy by far the longest stays in Britain, (likely to get value from the long travel!).

Britain's visitors are still centred around England and London, so a **huge opportunity remains to convert them to visiting more nations and regions** within Britain which has a significant impact on length of stay and revenue potential. Converting this opportunity will require a focus on itineraries that tap into the **unique cultural differences** of each nation and region – i.e. beyond just scenery and tourism products and experiences. Cultural uniqueness is very humanistic, forms the basis of historical and modern relationships across Britain and are of interest as they capture the true essence of international travel.

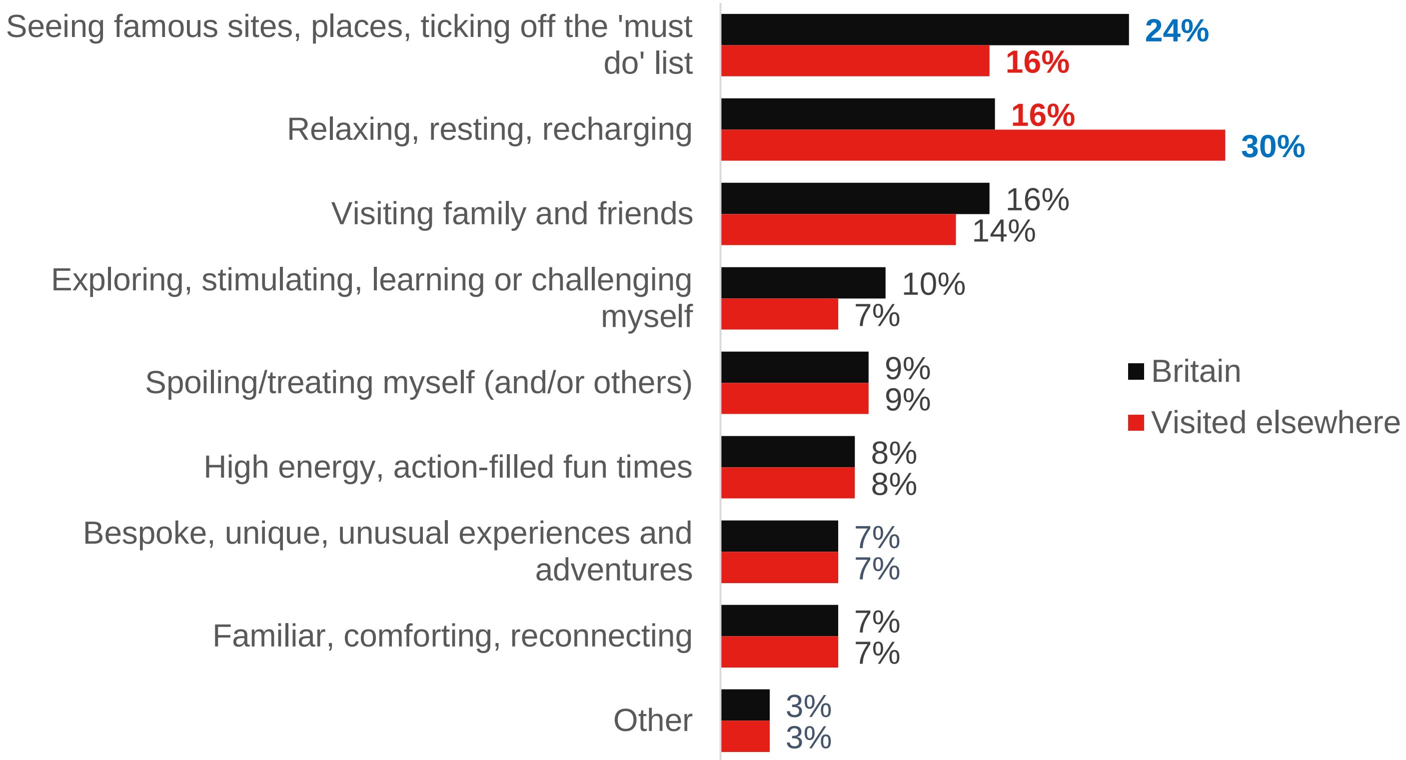
In Summary

A slightly different traveller type with important market differences and an enormous opportunity to expand their geographic and economic footprint once in Britain

What type of break or holiday do people experience in the UK?
And what impact does this have on advocacy and future visitation intention?

Britain visits are significantly skewed towards seeing 'must do' sites and places, but NOT a relaxing break relative to other destinations

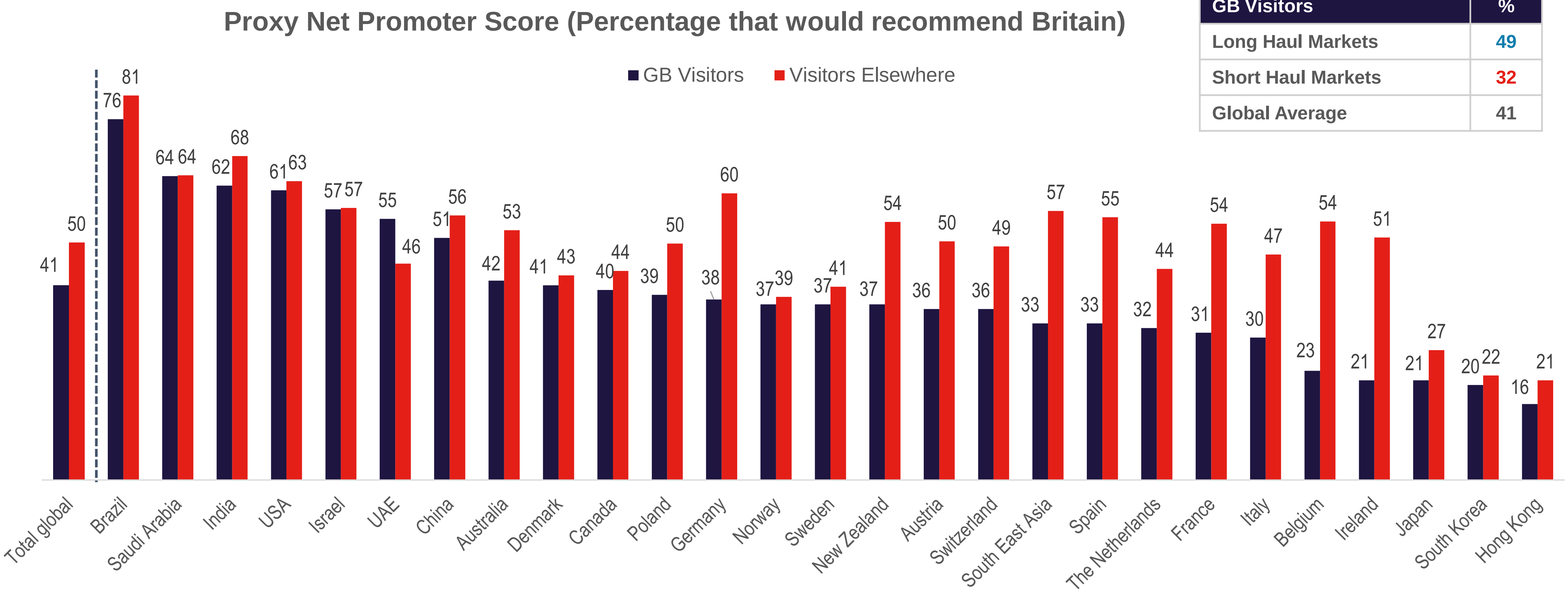
This should not necessarily be seen as a weakness, particularly with so many destinations targeting 'relaxation' with beautiful beaches and sunshine. Whilst the higher 'energy' of a Britain visit (more to see and do) is, therefore, part of its uniqueness, the desire for tourists to rest and recharge cannot be completely overlooked and could be well-delivered by unique products or experiences that complement the desire to visit the 'must see' places whilst offering a unique and ownable form of relaxation (e.g., high tea, inner-city spas, weekend countryside retreats, winter pub lunches, fishing trips, etc.).



*This is likely to be driven by the strong London-centric focus of trip-takers, especially for first-time visitors, but **we need to keep in mind that Restful Breaks/Holidays are the number one type sought (19% of total international holidays/breaks)***

F5. And which of these would you say was the main purpose of this trip?
Base: Britain visitors n=8,497; Visitors Elsewhere n=9,662; Global weighting applies

Visitors from Brazil, Saudi Arabia, India, USA, Israel, UAE and China are the strongest advocates for Britain, whilst many European visitors have stronger advocacy for other destinations



GB Visitors	%
Long Haul Markets	49
Short Haul Markets	32
Global Average	41

F6: Using the following scale, please tell us how much you would recommend a break or holiday in Britain to others?
*Promoters = Top 2 box score on a 10-point scale, minus Detractors = sum of those scoring 1-6

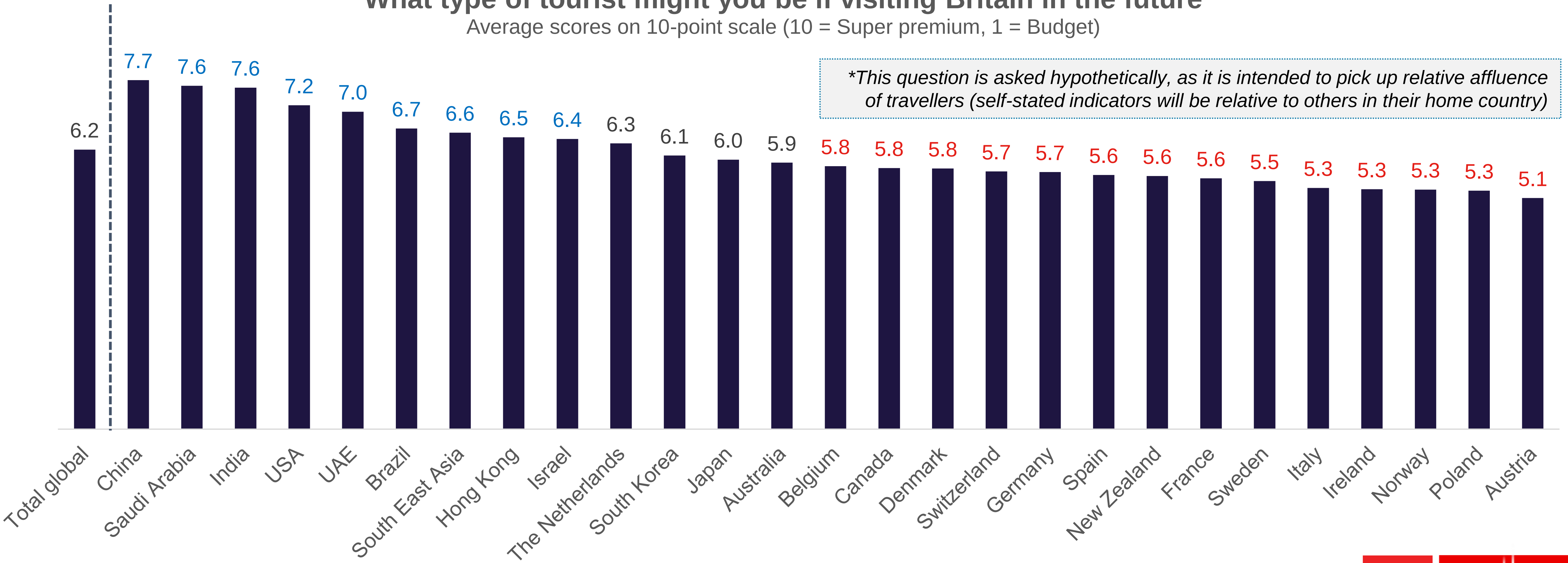
Higher *potential** spenders are more likely to come from Asia, the Middle East and USA

European travellers indicate they are likely to spend less in comparison (this is independent of how long they stay), however, this may also be due to the fact they are more likely to already have visited Britain, so may feel less of a need to ‘do everything’ in one trip. Other data also reveals they are very sensitive to deals, which shows a very different type of conversion opportunity versus some of the more premium long-haul markets.

What type of tourist might you be if visiting Britain in the future

Average scores on 10-point scale (10 = Super premium, 1 = Budget)

**This question is asked hypothetically, as it is intended to pick up relative affluence of travellers (self-stated indicators will be relative to others in their home country)*



J4. Using the scale below, please indicate what kind of tourist you might be if visiting Britain in the future?
Base is total (asked of all as hypothetical question): N=22,840; weight applied to total global score

In line with perceptions of Britain, we see that Britain Visitors are **most engaged with visiting famous sites to tick off the 'must-do' list.**

Equally, we also validate the fact that Britain is **not a place which global tourists visit for relaxing, resting and recharging**, despite this ranking as the fourth highest driver of leisure destination choice.

The **highest levels of advocacy and potential spend** are reported from markets such as Saudi Arabia, India, USA, UAE, Brazil and China.

Winning share of preference from these inbound markets is, therefore, likely to be particularly important.

In Summary

Visitors are looking to tick off the 'must see' sites and those from the Middle East, the Americas, China and India report the highest levels of advocacy and potential spend

08 Emergent Drivers:
Chapter Introduction

Chapter purpose

This chapter provides an exploration into three themes which we foresee as ‘Emergent Drivers’ in global tourism: Wellbeing, Sustainability and Accessibility & Inclusion. We examine each to understand the appetite of travellers for more tourism products and services in these spaces, as well as looking at what we can glean about target audiences and likely patterns of behaviour.

Image: Wasdale; Cumbria; England; VisitBritain/Rod Edwards

Image: Stranocum; Ballymoney; Northern Ireland; VisitBritain/James Relf Dyer

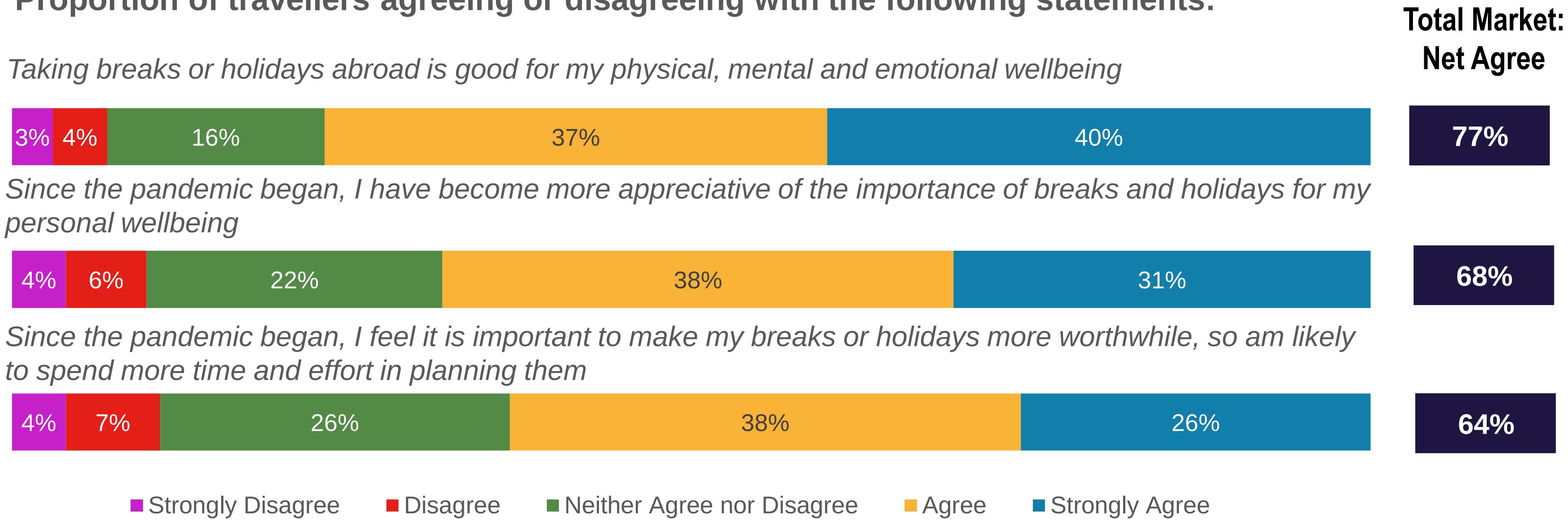
Image: England; Solstock/Getty Images

Emergent Driver #1: Wellbeing

What is the relevance of wellbeing as it applies to holidays and leisure breaks in a post-pandemic world?

Individuals are acutely aware of the connection between breaks and holidays and their own personal wellbeing

Proportion of travellers agreeing or disagreeing with the following statements:



*We might therefore expect to see an **increased degree of planning and thought** being put into leisure break and holiday planning in 2022 and beyond.*

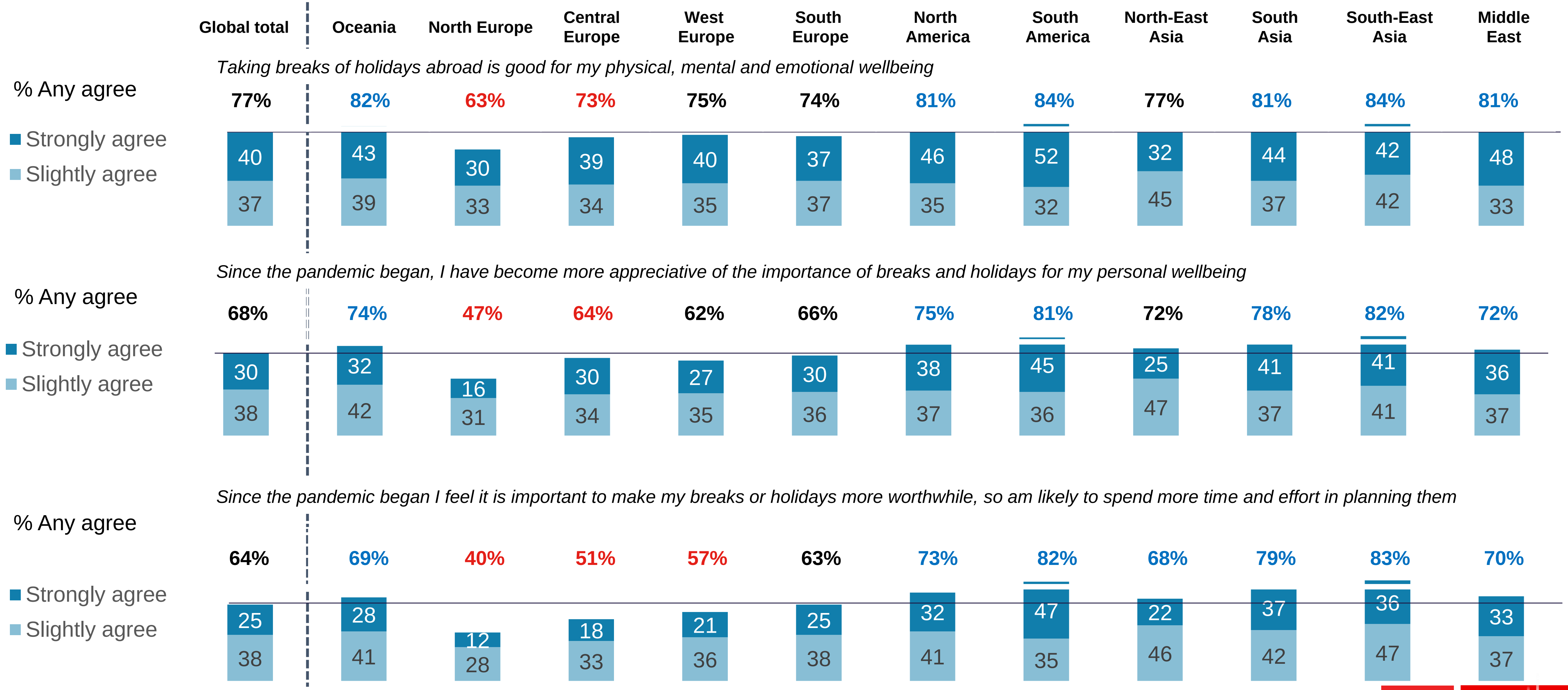
H4 Please tell us how much you agree or disagree with the following statements n=22,840; Global weighting applies

Higher than total @ 95% (colours may change for optimal visibility)

Lower than total @ 95% (colours may change for optimal visibility)

Tourists from Oceania, Americas, South Asia, South-East Asia and Middle East are the most likely to associate breaks and holidays with personal wellbeing

European travellers are less likely to indicate wellbeing shifts as being attributable to the pandemic, although still represent a strong wellbeing opportunity, particularly from Southern & Western Europe.



H4 Please tell us how much you agree or disagree with the following statements
Lines indicate the global average so the height of each stacked column can be more quickly compared

We are able to use the combination of responses to all 3 statements to create a 'bullseye' of those most engaged in Wellbeing as a theme

By taking those tourists who STRONGLY AGREE with ALL 3 of these statements, we can learn more about how the theme of Wellbeing can be used to engage prospective tourists.

Taking breaks or holidays abroad is good for my physical, mental and emotional wellbeing

Since the pandemic began, I have become more appreciative of the importance of breaks and holidays for my personal wellbeing

Since the pandemic began, I feel it is important to make my breaks or holidays more worthwhile, so am likely to spend more time and effort in planning them

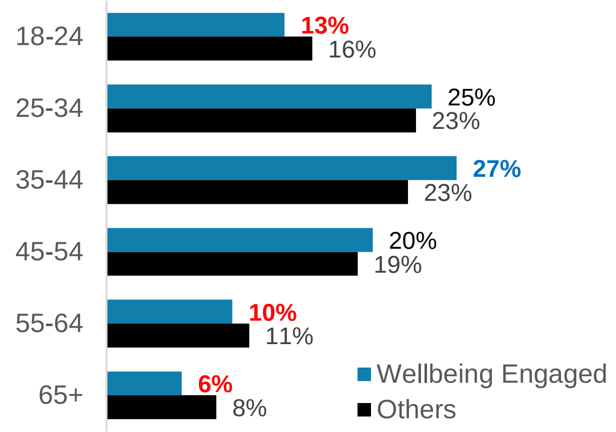
*Those who **STRONGLY AGREE** with all 3 of these statements are defined as our Wellbeing Engaged segment.*

They represent ***15%*** *of all global tourists*

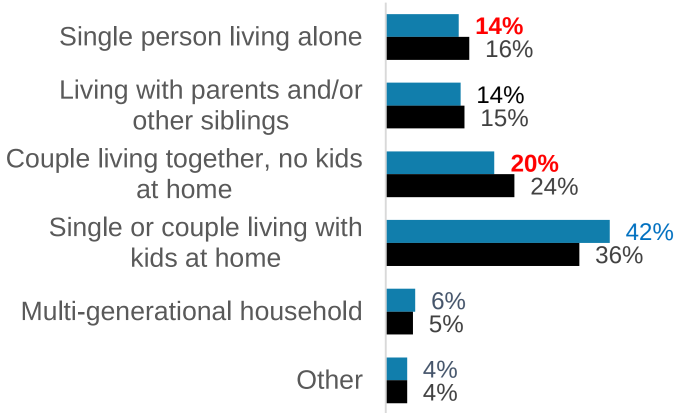
This doesn't mean we are only targeting this much smaller proportion of Wellbeing Seekers. It just allows us to identify what most defines the bullseye of a tourist who might be most engaged with tourism ideas, products, experiences and/or communications to help inform

Profiling the Wellbeing Engaged reveals they are more likely to be Experience Seekers, female and to have children

AGE PROFILE:



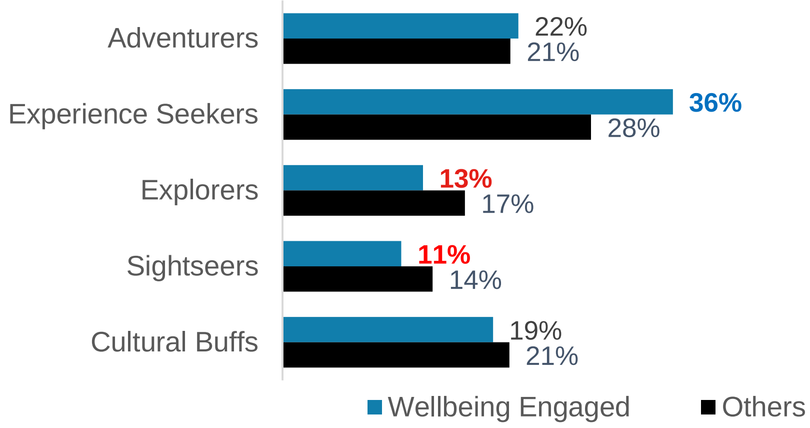
HOUSEHOLD STRUCTURE:



GENDER:

	Wellbeing Engaged	Others
Male	42%	50%
Female	57%	49%
Other response*	<.5%	<.5%

SEGMENT:

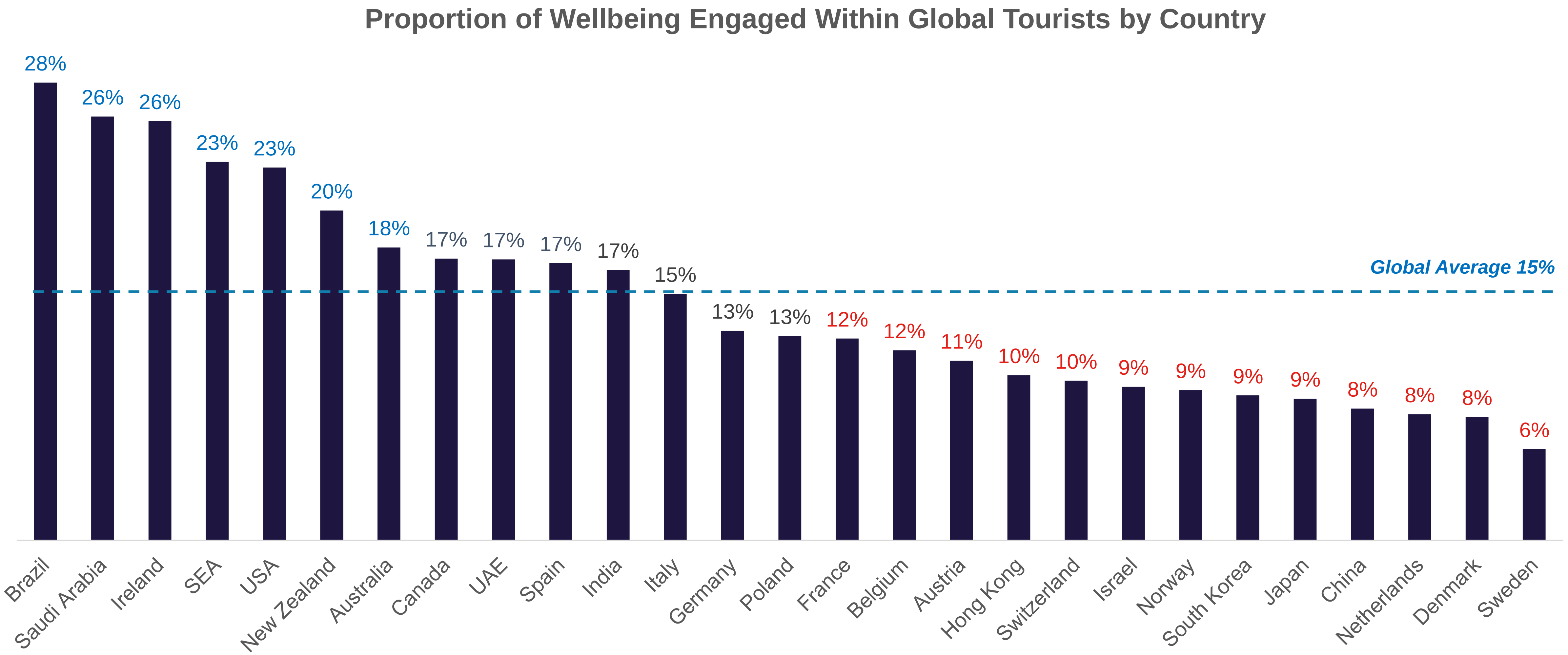


FINANCIAL SELF-ASSESSMENT:	Wellbeing Engaged	Others
Constantly struggle to make ends meet, so can't always afford to do what we'd love to do	17%	16%
Have a lot to cover with our income/savings, so an international trip requires a lot of saving and planning	26%	32%
Fortunate to be able to take breaks/holidays abroad with a bit of planning	40%	39%
Lucky to not have to worry about finances, so we are able to splash out on trips abroad as I/we wish	18%	12%

A2. Please tell us how old you are
A3. Which of the following gender classifications best describes you? (*Other response includes "I prefer to be described in another way" and "Prefer not to say")
J1: Which of the following best describe the household in which you usually live?
J3 Which of the following best describes your current financial situation when it comes to things like taking leisure breaks or holidays like the ones we have been asking about today?
Segments based on section B as per global algorithm; Base sizes: Wellbeing engaged n=3,469 Others n=19.371, global weighting applied

Blue = wellbeing engaged significantly higher than comparative cell @ 95% confidence
Rad = wellbeing engage significantly lower than comparative cell @ 95% confidence

Brazil, Saudi Arabia and Ireland have the highest prevalence of Wellbeing Engaged tourists



Wellbeing Engaged based on H4; Top box agreement to all 3 statements; global weighting applied

The Wellbeing Engaged have a higher propensity to visit Britain but face some interesting competition

The wellbeing engaged also have a higher propensity to visit other destinations.

It is also important to keep in mind that ***Propensity to visit Britain*** *scores are somewhat inflated by the fact that the base contains only those who would consider visiting Britain (this is not the case for competitors).*

We have only shown here competitors who were asked to at least 10 fieldwork markets.

Average Propensity to Visit Score by Destination	Not Wellbeing Engaged	Wellbeing Engaged	GAP
Australia	6.5	7.5	1.0
Ireland	5.6	6.6	1.0
Italy	6.5	7.5	1.0
Spain	6.4	7.4	1.0
France	6.3	7.3	0.9
Britain	6.9	7.8	0.9
Switzerland	6.1	7.0	0.9
Netherlands	5.6	6.5	0.9
Germany	6.0	6.7	0.7
USA	5.6	6.2	0.7
Austria	5.6	6.2	0.6

D5: How likely is it that you will visit the following countries in the next 2 years for a holiday or short break? Please give a score between 1 and 10, where 1 would mean that you are not at all likely and 10 that you are very likely to visit that country in the next 2 years.
Base: global sample N=22,840 split by Wellbeing Engaged n=3,469 and not n=19,371; global weighting applies

They also show a higher appetite for all types of tourism products and experiences, evidencing that 'wellbeing' has a diverse meaning

Importantly, Coastal Places & Scenery, Local Food & Beverage experiences and Visiting Iconic Places all play a consistent role as the top-3 ranked experiences desired, independent of Wellbeing Engagement.

DESIRED EXPERIENCES FOR TRIPS TO….	Top 3 Box interest: Wellbeing Engaged	Top 3 Box interest: Others	Top 3 Box interest: DIFF	RANK – top 10: Wellbeing Engaged	RANK – top 10: Others
Socialising with locals	68%	45%	23%		
Attend a cultural/historical exhibition or event	68%	46%	22%		
Guided tours/day excursions	67%	45%	22%		
Participate in action and adventure experiences	60%	38%	22%		
Visit parks and gardens	75%	53%	21%	6	6
Visit zoos, aquariums, and wildlife parks	68%	47%	21%	10	
Experience coastal places and scenery	88%	66%	21%	1	2
Visit famous/iconic tourist attractions and places	82%	61%	21%	3	3
Attend a live music festival/event	61%	41%	20%		
Enjoy outdoor walks, hiking or cycling	73%	53%	20%	7	7
Visit famous shops or shopping streets/centres	69%	49%	20%	9	9
Experience rural life and scenery	75%	55%	20%	5	5
Visit literary, music, film and TV locations	58%	38%	20%		
Visit a winery (e.g. wine tasting/ vineyard tour)	59%	40%	20%		
Experience city life	72%	52%	20%	8	8
Explore local food and beverage specialities	86%	67%	19%	2	1
Visit museums or galleries	67%	48%	19%		
Visit theatre, opera, ballet or musicals	53%	35%	18%		
Enjoy fine dining experiences	67%	49%	18%		
Experience pubs, bars and clubs	58%	40%	17%		10
Attend a learning course (cooking, language etc)	45%	28%	17%		
Explore history and heritage (historical sites, architecture)	76%	59%	17%	4	4
Visit a brewery or distillery	53%	36%	17%		
Participate in wellness activities e.g. yoga, meditation, health retreats	47%	30%	17%		
Self-driving tours	61%	45%	17%		
Attend a sporting event	46%	32%	14%		
Volunteering	37%	24%	13%		
Participate in sport (golf, football, etc.)	39%	28%	11%		

D2. Below, are a list of things you might like to do when taking a break or holiday abroad. Top 3 Box scores indicated on 10-point interest scale
Please indicate how much you might like to do each on a break or holiday abroad
Bases: Wellbeing engaged n=1,593 Others n=9,171; global weighting applied
Blue numbers are significantly higher than comparative column @ 95%

kubi kalloo VISIT BRITAIN

People are more aware of the **association between travel and wellbeing,** viewing breaks and holidays as a means of enhancing one's physical, mental and emotional wellbeing. The **global pandemic** appears to have contributed to this sentiment.

Those most engaged with wellbeing over-index on being **female, younger,** **Experience Seekers** and having more financially resources for travel.

Wellbeing-engaged individuals have a **stronger propensity to visit Britain,** but this is matched by a stronger propensity to also visit many other countries, illustrating intense competition. We expect they will invest **more time and effort in planning** their leisure breaks and visiting more places and experiences whilst in Britain.

At the same time, more needs to be done to unpack what 'Wellbeing' actually means, as there is evidence to suggest it may **mean very different things to different people**.

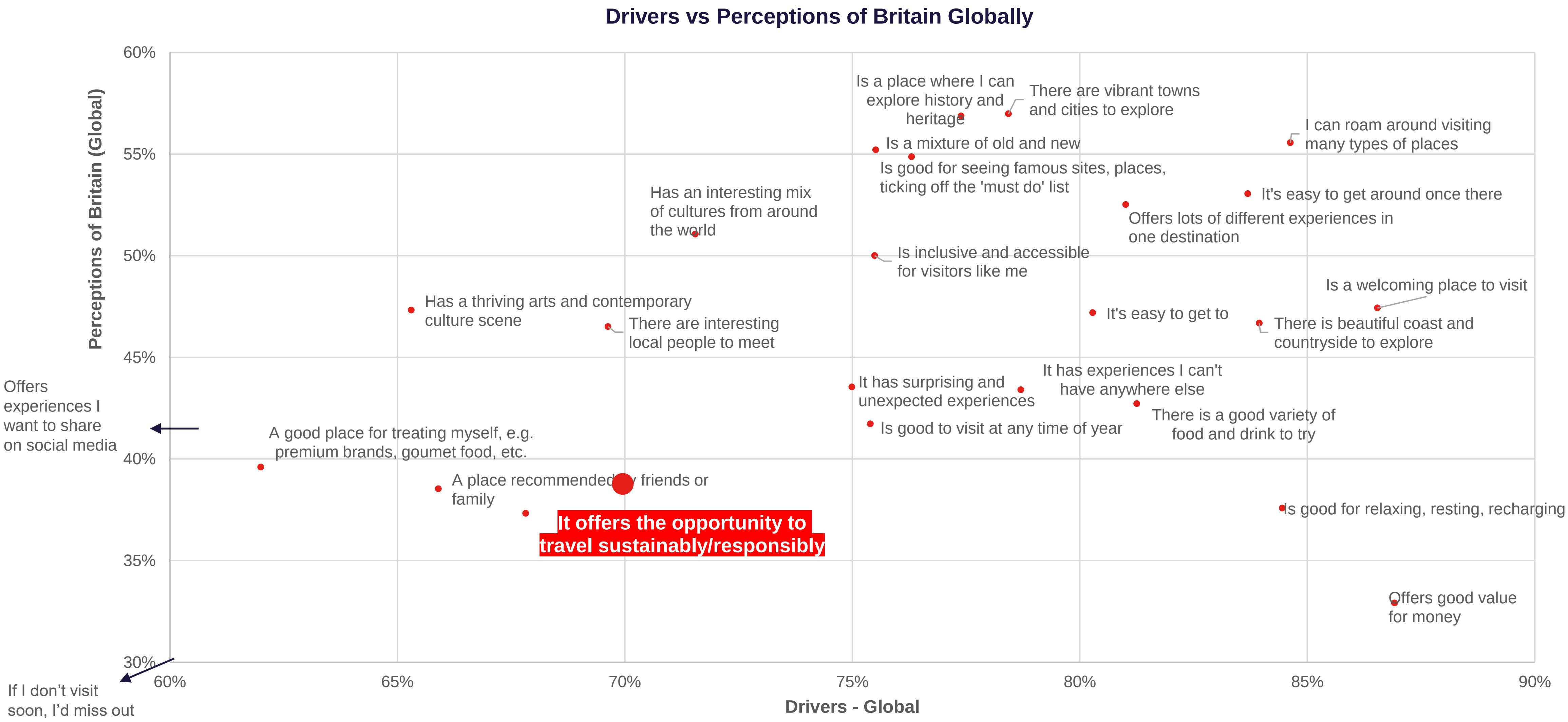
In Summary

Wellbeing is of emerging importance amongst global tourists and presents an activation opportunity for Britain that requires further exploration and understanding

Emergent Driver #2: Sustainability

What can we learn from international tourists about sustainable tourism and its implications for British tourism?

Sustainability is not currently a top driver of destination choice, or a particularly strongly held perception of Britain



E1. Britain perceptions mapped against D3. Drivers for International Tourists; Total base size N=22,840; Global weighting applied

Australia leads the way in terms of perceived Sustainability, but let's explore what this really means…

Of all the markets included, Australia is rated highest by long-haul travellers on perceptions of sustainability amongst visitors and considerers alike (+8% higher than Britain).

Websites and brands such as ajourneydownunder.co.uk offer a range of experiences, itineraries and information that support principles of **personalisation**, **localisation** and **discovery of hidden secrets** – people, places and products that **care.**

It is this tone which communicates most strongly to sustainability and can play an important role in harnessing tourism products

Image: Corfe Castle; Dorset; England; VisitBritain/National Trust/Paul Healy

Based on desk research analysis

Currently, the term ‘sustainable/responsible’ tourism is interpreted very broadly

What does sustainable/responsible tourism mean to you?

Top Ranked statements of those indicating they knew what it meant (93%)

H1: As a traveller what does sustainable/responsible tourism mean to you? Please rank the top 3 statements below that best reflect what sustainable/responsible tourism mean to you.
Base N=22,840 Global Total; global weighting applied

Higher than comparative bar @ 95% (colours may change for optimal visibility)
Lower than comparative bar @ 95% (colours may change for optimal visibility)

9 in 10 tourists claim to have engaged in some form of sustainable behaviour in the past, with ‘buying local’ by far the most dominant current behaviour for all tourists

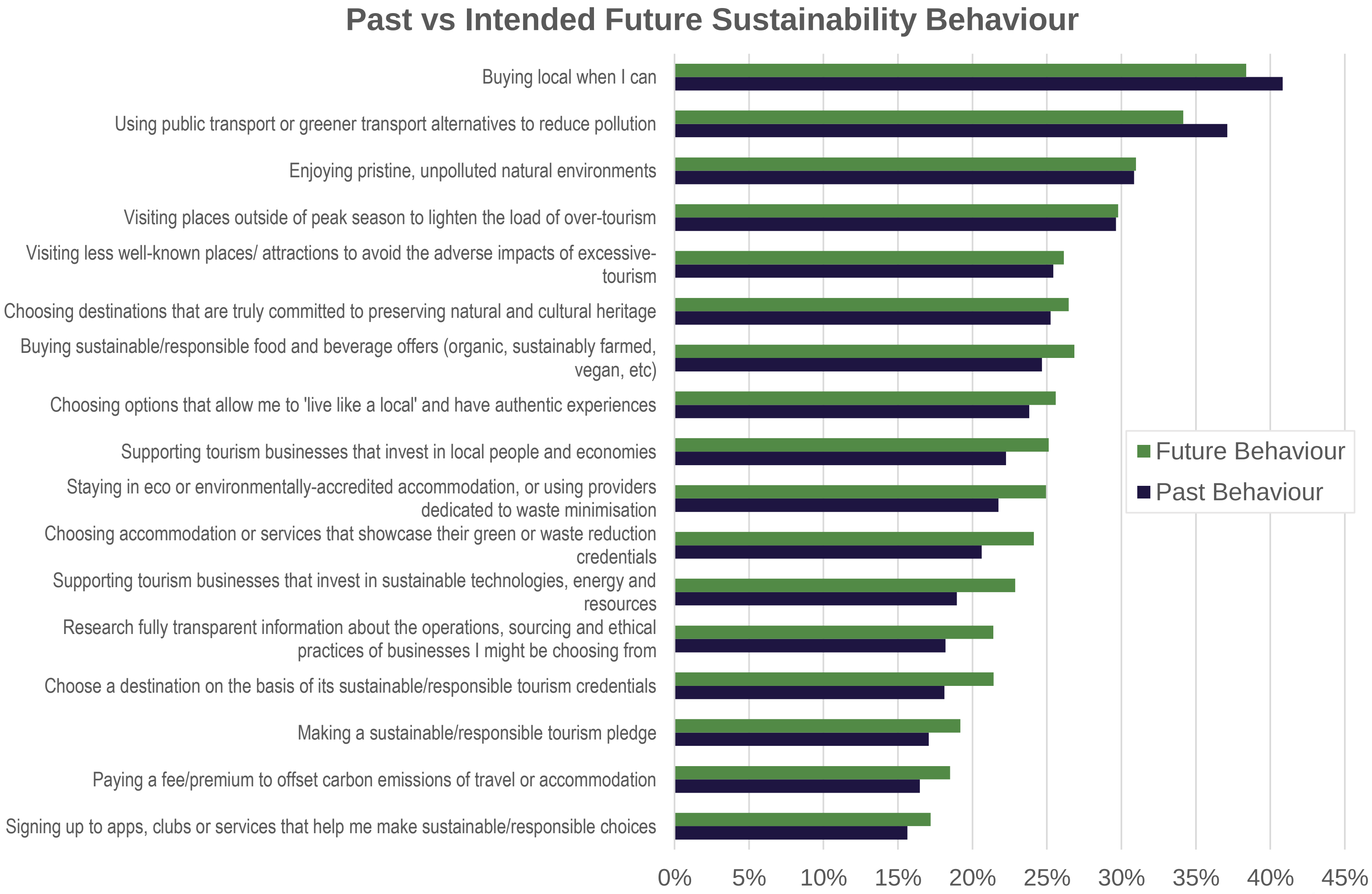
When it comes to taking leisure breaks/holidays abroad which of the following have you done in the past?

H2: And when it comes to taking leisure breaks or holidays abroad, which of the following things have you done in the past?

Past behaviour mirrors intended future behaviour almost identically

Whilst there is a marginal difference between past and future intended behaviours (maximum of 4%) when it comes to tourists visiting Britain, **95% of these behaviours are represented by the same people.**

In other words, whilst there is an appetite for more sustainable behaviour in the future, the **immediate opportunity lies in reinforcing and enriching their commitment,** particularly given 92% of all tourists are already engaging in at least one of these behaviours.



H2a: And when it comes to taking leisure breaks or holidays abroad, which of the following things have you done in the past?
H2b. And which do you plan to do on future breaks or holidays?

But there are barriers that we need to address, particularly perceived cost which is consistent across markets

Top Ranked Barrier to Engaging in Sustainable Tourism Behaviour

***Perceived cost is the strongest stated barrier**,.*

*Reading beyond this, therefore, we see that **lack of clarity** around what sustainable tourism means, **its impact and how to navigate these behaviours** are more likely the true reasons for not changing behaviour.*

H3. Which of the following do you believe *prevent* you from travelling more sustainably/responsibly?
Select the top 3 statements that you feel prevent you from travelling more sustainably/responsibly when taking a leisure break or holiday abroad.

kubi kalloo VISIT BRITAIN

Sustainability is an emerging driver of importance in destination selection for international tourists, most relevant to **Experience Seekers** and younger travellers (but not necessarily the intersection of the two!).

It is interesting that 9 in 10 travellers claim to have engaged in sustainable tourism behaviours, illustrating **strong emotional engagement and positive endorsement.**

The perceived cost of sustainable choices is the most significant barrier when it comes to sustainable travel behaviour.

Future intentions mirror past behaviour, suggesting we focus on **reinforcing current behaviours around themes of localisation, nature, dispersion (geographic and seasonal) and preservation.**

We see evidence of a stronger imprint in terms of perceptions of sustainability in Australia (amongst long-haul travellers) where these themes are being utilised.

Key barriers are consistent across markets and segments, all pointing to a need for **greater clarity, signalling and impact reinforcement** to overcome behavioural apathy.

In Summary

An emerging driver of destination and product choice, but requiring clarity, signalling and impact reinforcement

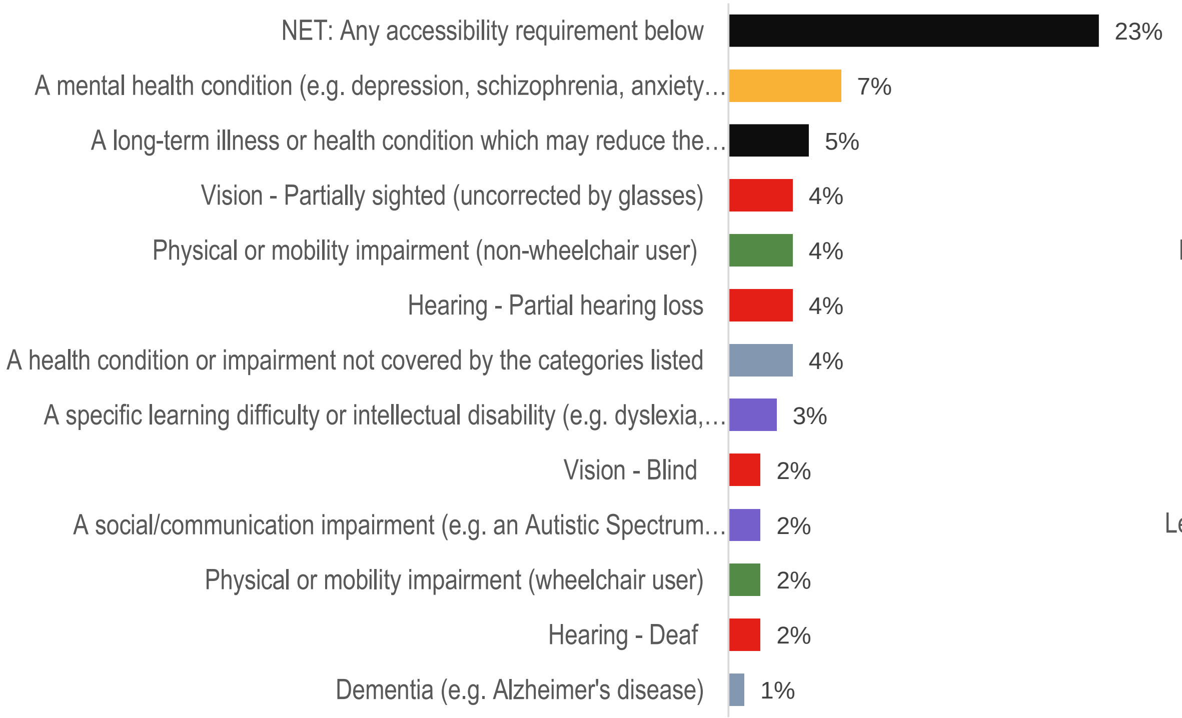
Emergent Driver #3: Accessibility & Inclusiveness

What can we learn about accessibility and inclusiveness as it applies to international tourists and Britain?

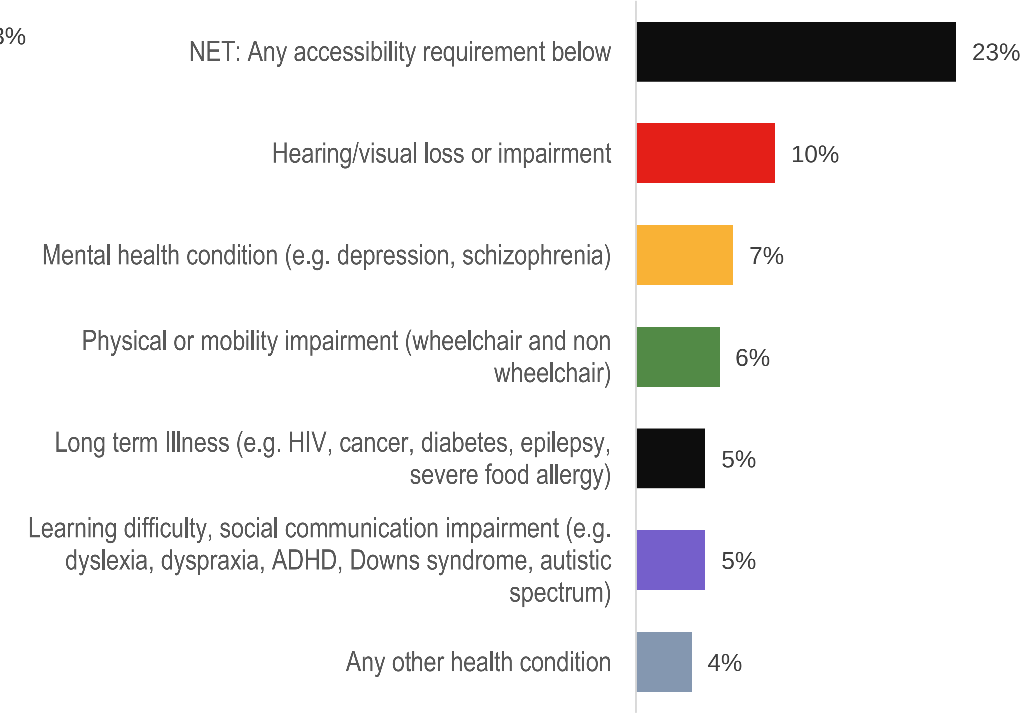
A quarter of travellers either have, or travel with, someone who has an accessibility requirement, with hearing/sight loss or impairment being the most prevalent

Types of health conditions/disabilities

Total



Nets: Clustering Full List Into More Succinct Groupings (See colour codes)



J6 Do you (or any individual you typically travel with) have any of the following health conditions or impairments?
Multiple Response Base: Total Global N=22,224 Weighted.

North Europe, South Asia and North America see the highest proportion of travellers with accessibility requirements, predominantly hearing or visual loss/impairment-related

These patterns are likely to reflect a combination of regional health status, but equally, values, inclusivity and support for people with accessibility requirements in each local region.

Types of health conditions/disabilities by visitor region

	Total	Oceania	North Europe	Central Europe	West Europe	South Europe	North America	South America	North-East Asia	South Asia (India)	South-East Asia	Middle East
Net: Any accessibility requirement below	23%	27%	**33%**	25%	26%	**18%**	**29%**	22%	**10%**	**30%**	**12%**	**17%**
Hearing/visual loss or impairment	10%	11%	11%	9%	10%	**6%**	**14%**	7%	**3%**	**23%**	**5%**	10%
Mental health condition (e.g. depression, schizophrenia)	7%	10%	10%	8%	6%	**4%**	9%	8%	**3%**	7%	**3%**	**4%**
Physical or mobility impairment (wheelchair and non wheelchair)	6%	7%	6%	5%	5%	4%	**9%**	**3%**	**2%**	**17%**	**3%**	5%
Long term Illness (e.g. HIV, cancer, diabetes, epilepsy, severe food allergy)	5%	5%	7%	5%	6%	3%	5%	4%	**2%**	5%	**2%**	4%
Learning difficulty, social communication impairment (e.g. dyslexia, dyspraxia, ADHD, Downs syndrome, autistic spectrum)	5%	6%	8%	3%	5%	3%	7%	4%	**2%**	**15%**	3%	6%
Any other health condition	4%	6%	6%	5%	5%	3%	4%	5%	**1%**	3%	4%	2%

J6 Do you (or any individual you typically travel with) have any of the following health conditions or impairments? Multiple Response
Base: Total Global N=22,224 Weighted and by continent

Britain is also seen as one of the more inclusive and accessible countries, amongst those tested, by travellers with accessibility requirements

E1 Please indicate which destinations you associate with the following statements.
Base: Total Global N=22,224 Weighted and by health impairment

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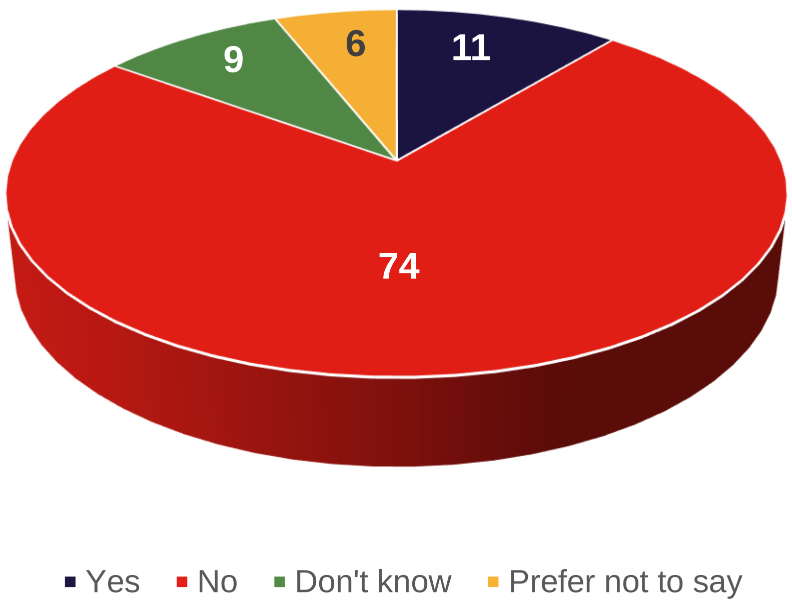
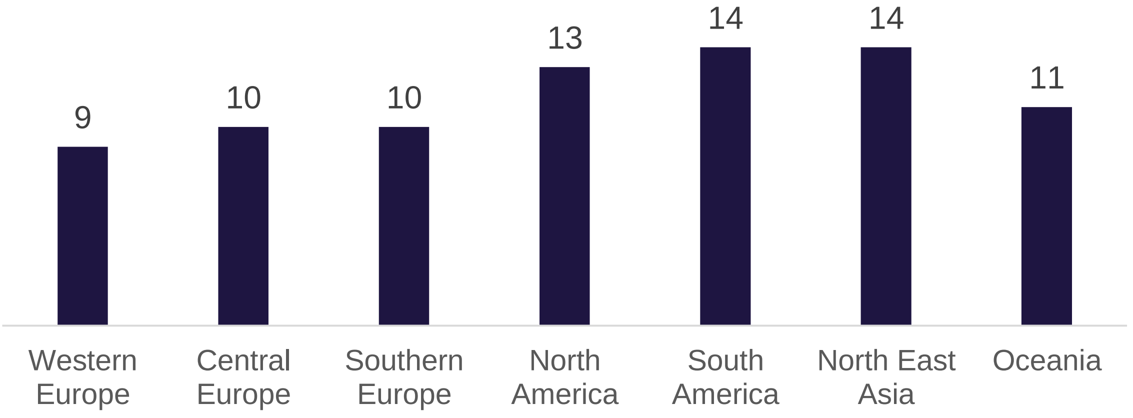
1 in 10 travellers (in countries where the question was posed*), identify as being part of the LGBTQIA+ community

Do you identify as part of the LGBTQIA+ community?



Regions by % LGBTQIA+ Identity



Within the LGBTQIA+ community, there is a skew to younger travellers, with 52% being under 35yrs (compared with 39% total population)

**NB: question not asked in China, UAE, Saudi Arabia, Denmark, SEA, India, Poland, Norway, Israel, Sweden*

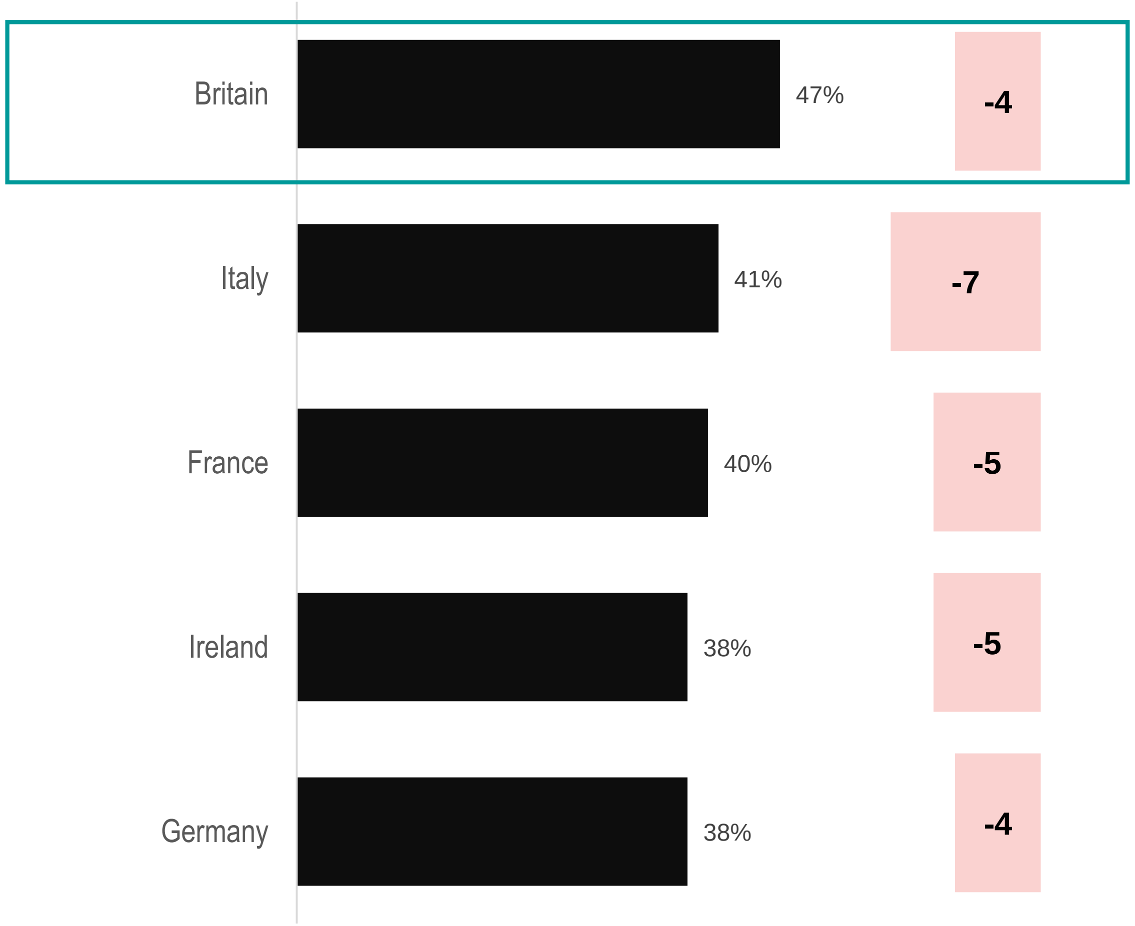
J5 Do you identify as part of the LGBTQIA+ community? Total 15,335 (not asked in the following countries: China, UAE, Saudi Arabia, Denmark, SEA, India, Poland, Norway, Israel, Sweden)

Higher than comparative sample @ 95%
Lower than comparative sample @ 95%

Britain is seen as one of the most inclusive and accessible countries amongst LGBTQIA+ travellers although perceptions are weaker than amongst total population

‘Is inclusive and accessible for visitors like me’
(by LGBTQIA+ travellers)

Difference in score from those who don’t identify as LGBTQIA+



‘Is a welcoming place to visit’
(by LGBTQIA+ travellers)

Difference in score from those who don’t identify as LGBTQIA+

E1 Please indicate which destinations you associate with the following statements.
Base: Total Global N=22,224 Weighted and by health impairment

One in four travellers or their companions travel with accessibility needs, the most prevalent of which are hearing/vision impairment and mental health.

Northern Europe, South Asia and North America have the highest penetration of those with accessibility tourism needs.

Currently, **Britain is seen as inclusive and welcoming amongst these tourists**.

Approximately **one in ten tourists identify as part of the LGBTQIA+ community**

Britain is seen as one of the more welcoming and inclusive countries for the LGBTQ+ community although scores are lower than amongst the non-LGBTQ+ community (as per other countries), so there is still room for improvement when it comes to inclusivity.

In Summary

One in four tourists or their immediate travelling companion(s) will have accessibility needs, but this is not a barrier in wanting to visit Britain.

One in ten tourists identify with the LGBTQ+ community, within which being seen as inclusive, and welcoming will be increasingly important

09 The Customer Journey

What tools, touchpoints and resources do tourists use at each stage in their decision making?

And how does this differ when taking a trip to Britain?

The Customer Journey can be broken down into 3 key stages:

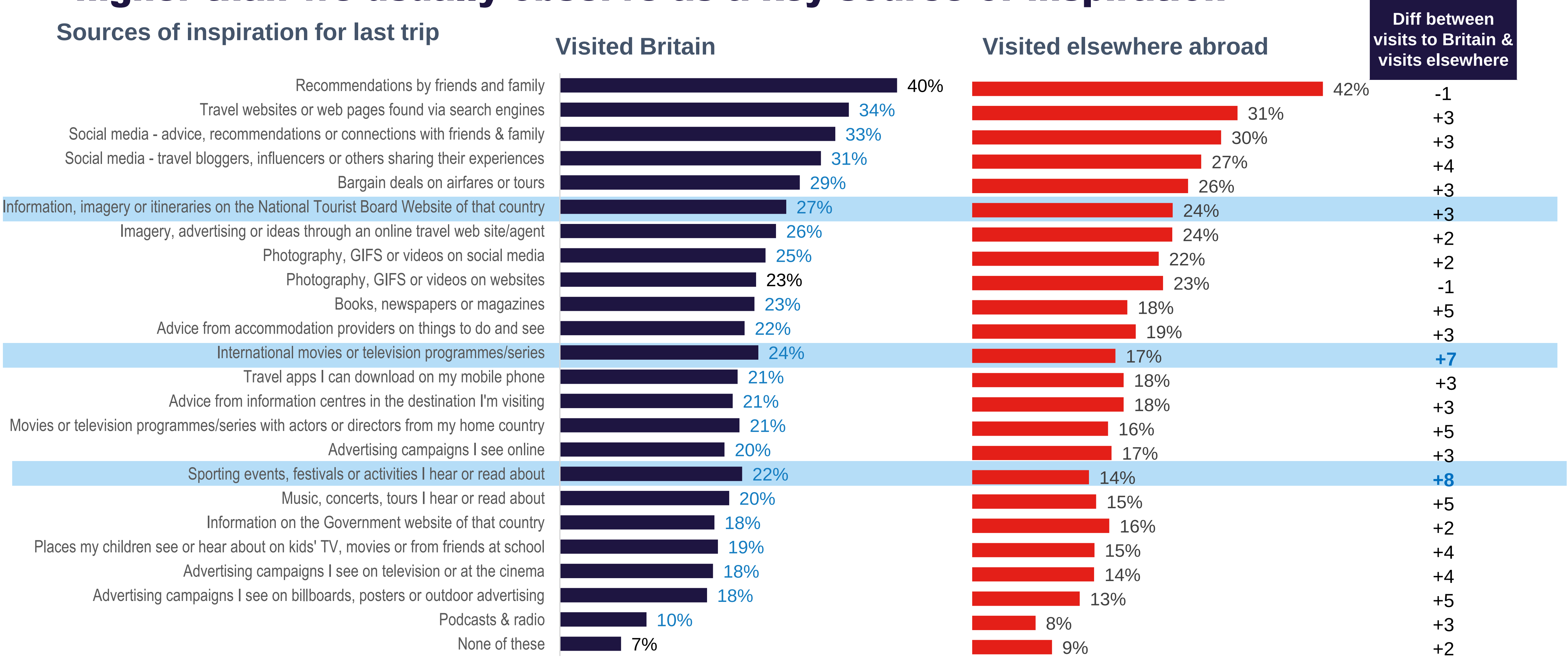
Inspiration, Deciding, Planning & Booking

Let’s start with looking at:

Inspiration, Deciding, Planning & Booking

Recommendations by friends and family are the most dominant inspiration for travel. Sporting events and international movies / TV programmes provide more inspiration for Britain visits than elsewhere and National Tourist Boards ranks higher than we usually observe as a key source of inspiration

Sources of inspiration for last trip



I1. Please select the main places/tools/sources which inspired you to consider the break or holiday in [DESTINATION].Select all that apply.
Base; Total Global N=22,840; Visited Britain; N=8,497; Visited Elsewhere Abroad N=9,662; global weighting applied to all
Blue indicates that Visited Britain is statistically higher than Visited Elsewhere @ 95% confidence
Note: rounding error may occur as percentage decimal places have been truncated

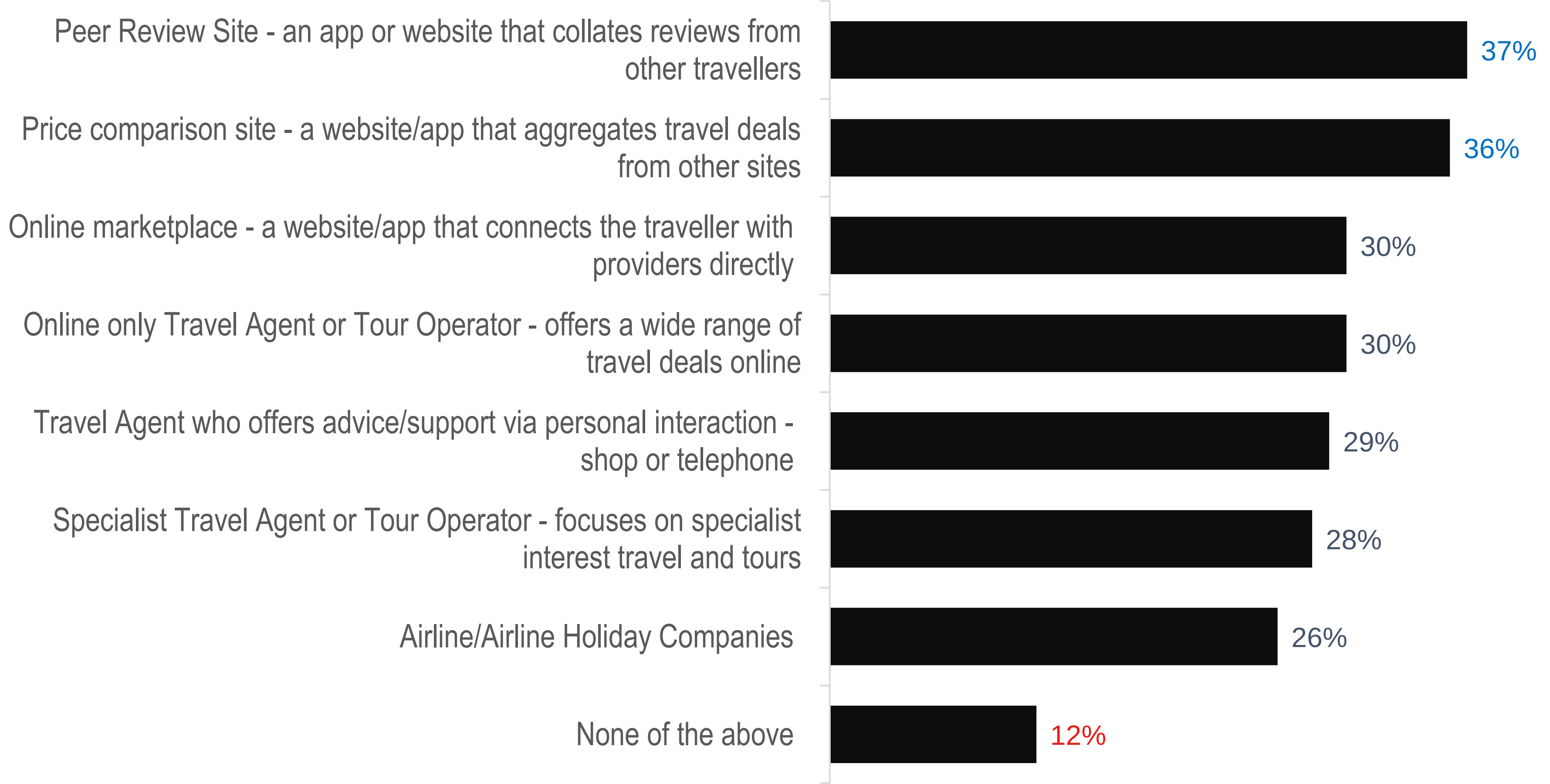
Inspiration to visit Britain also varies by region - triggered more by deals for European visitors, while social media inspires in Asia and the Middle East, and bargain airfare or tour deals spur Northern European visitors to consider

GLOBAL RANK	TOP SOURCES OF INSPIRATION TO VISIT BRITAIN	RANK ORDER WITHIN REGION: OCEANIA	NORTHERN EUROPE	CENTRAL EUROPE	WESTERN EUROPE	SOUTHERN EUROPE	NORTH AMERICA	SOUTH AMERICA	NORTH-EAST ASIA	SOUTH ASIA	SOUTH-EAST ASIA	MIDDLE EAST
1	Recommendations by friends and family	1	2	1	1	1	2	5	6	6	4	3
2	Travel websites or web pages found via search engines	2	4	2	3	2	1	2	3	4	2	4
3	Social media - friends & family	3	3	5	4		3	3	2	2	3	1
4	Social media – travel bloggers, influencers experiences	5	5		5	6	5	1	1	1	1	2
5	Bargain deals on airfares or tours	4	1	3	2	3						
6	Information, imagery or itineraries on NTB website			6	5	4	4			3	5	5
Not in global top 6, but in region Top 6	Imagery, advertising, ideas on online travel web site/agent					5	6	6	4			
	Photography, GIFS or videos on social media								5			
	International movies or television programmes/series							4				
	Books, newspapers or magazines			4								
	Accommodation providers advice on things to do and see											
	Travel apps I can download on my mobile phone										6	6
	Advice from information centres in Britain	6										
	Music, concerts, tours I hear or read about		6									
	Information on the Government website									5		

I1. Please select the main places/tools/sources which inspired you to consider the break or holiday in Britain. Select all that apply.
Base N=8,497 Visited Britain. Base sizes by continent or region (refer sample pages); global weighting applied

When we look at more specific resources used in the Inspiration phase, we note that a broad combination of resources are being used but those providing reviews and comparisons are used more often

The Inspiration Phase (Global):



On average, 2.3 resources are used in the inspiration phase, with long-haul markets using more (2.5 vs 2.1 short-haul)

Using More Than 1 Type of resource or intermediary

Total
60%

I2: Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages? Multiple Response
Base: Total Global N=22,840 Weighted.
Blue numbers are significantly higher than comparative base @ 95% confidence

NB: Respondents were shown market specific examples to help them understand the categories

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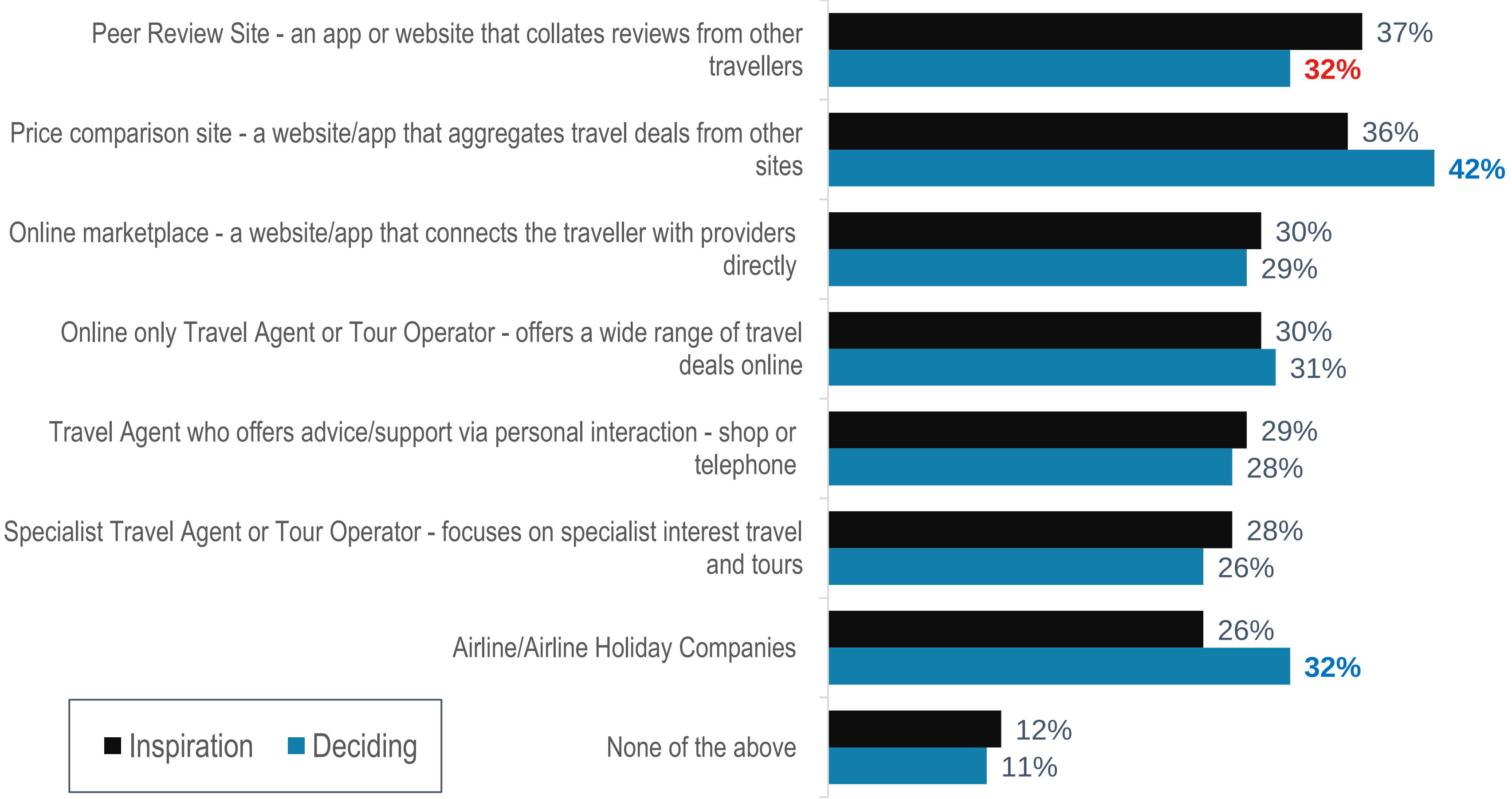
What happens in the next phase?

Inspiration, Deciding, Planning & Booking

When it comes to the deciding phase, at a global level, we see the role of price comparison sites and airlines significantly increase, whilst the relevance of peer review sites diminishes somewhat

Comparing Use From Inspiration to Deciding Phases of the Customer Journey



Blue numbers in the table reflect a significant increase vs the previous Inspiration phase; red a decrease

The role of each intermediary drops back down again in the planning phases, but booking behaviours become more interesting

I2: Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages? Multiple Response
Base: Total Global N=22,840 Weighted.
Blue numbers are significantly higher than comparative base @ 95% confidence

NB: Respondents were shown market specific examples to help them understand the categories

Regional differences are evident with intermediaries having more of a role across Asia, the Middle East and South America, less so for Europeans

Difference in usage of intermediaries by region versus global average (largest statistically significant differences shown)

Stage	Intermediary	SE Asia	South Asia	NE Asia	Middle East	South America	Oceania	North America	Central Europe	West'n Europe	Sth'n Europe	Nth'n Europe
INSPIRATION	Price comparison site	+6	+7				-4					
	Peer Review Site	+9		+7	+5	+14	-9			-4	+5	-6
	Airline/Airline Holiday Companies	+5	+7		+7				-5	-5	-5	
	Online marketplace	+9	+12	+8	+8	+4	-6			-7	-5	-6
	Online only Travel Agent/Tour Operator	+8	+13	+5	+6		-6			-8	-4	
	Travel Agent - shop or phone	+6	+10	+10	+6	+6				-6	-7	-5
	Specialist Travel Agent/Tour Operator	+7	+9	+8	+8	+6			-5	-6		-6
DECIDING	Price comparison site	+14			+4						-8	-5
	Peer Review Site	+13		+4	+6	+6				-5		-10
	Airline/Airline Holiday Companies	+10	-4	+8	+10	+7	+4		-8	-8	-6	
	Online marketplace	+12	+9	+5	+10				-4	-6		-8
	Online only Travel Agent/Tour Operator	+12	+12	+9	+7	+4				-10	-7	-5
	Travel Agent - shop or phone	+10	+8	+6	+10	+9			-4	-8	-7	-10
	Specialist Travel Agent/Tour Operator	+13	+10	+10	+8	+6			-7	-8	-4	-9
PLANNING	Price comparison site	+11	+4		+4	+10				-4		-5
	Peer Review Site	+10	+5	+5	+4	+4	-4			-5		
	Airline/Airline Holiday Companies	+8		+5	+5	+8	+7		-6	-7	-5	
	Online marketplace	+11	+11		+7	+11				-6		-7
	Online only Travel Agent/Tour Operator	+9	+13	+5	+7	+12				-9	-6	-6
	Travel Agent - shop or phone	+8	+12		+6	+14	+8			-8	-6	-8
	Specialist Travel Agent/Tour Operator	+8	+11	+5	+10	+13			-7	-7		-8

- Price comparison and peer review sites particularly popular in **South-East Asia**
- Peer review sites also appeal for inspiration in **South America**, with travel agents relied on in the planning stage
- **Oceania** rely less on intermediaries for inspiration and look more to airlines and personal interaction with a travel agent when planning and deciding

Long Haul markets will have longer customer journeys as short haul markets will be more familiar with the destination and have shorter booking period

I2: Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages? Multiple Response
Base: Total Global N=22,840 Weighted.
Numbers are statistically higher than the average @ 95% confidence
Where non figures are shown, this is because there are no significant differences versus total

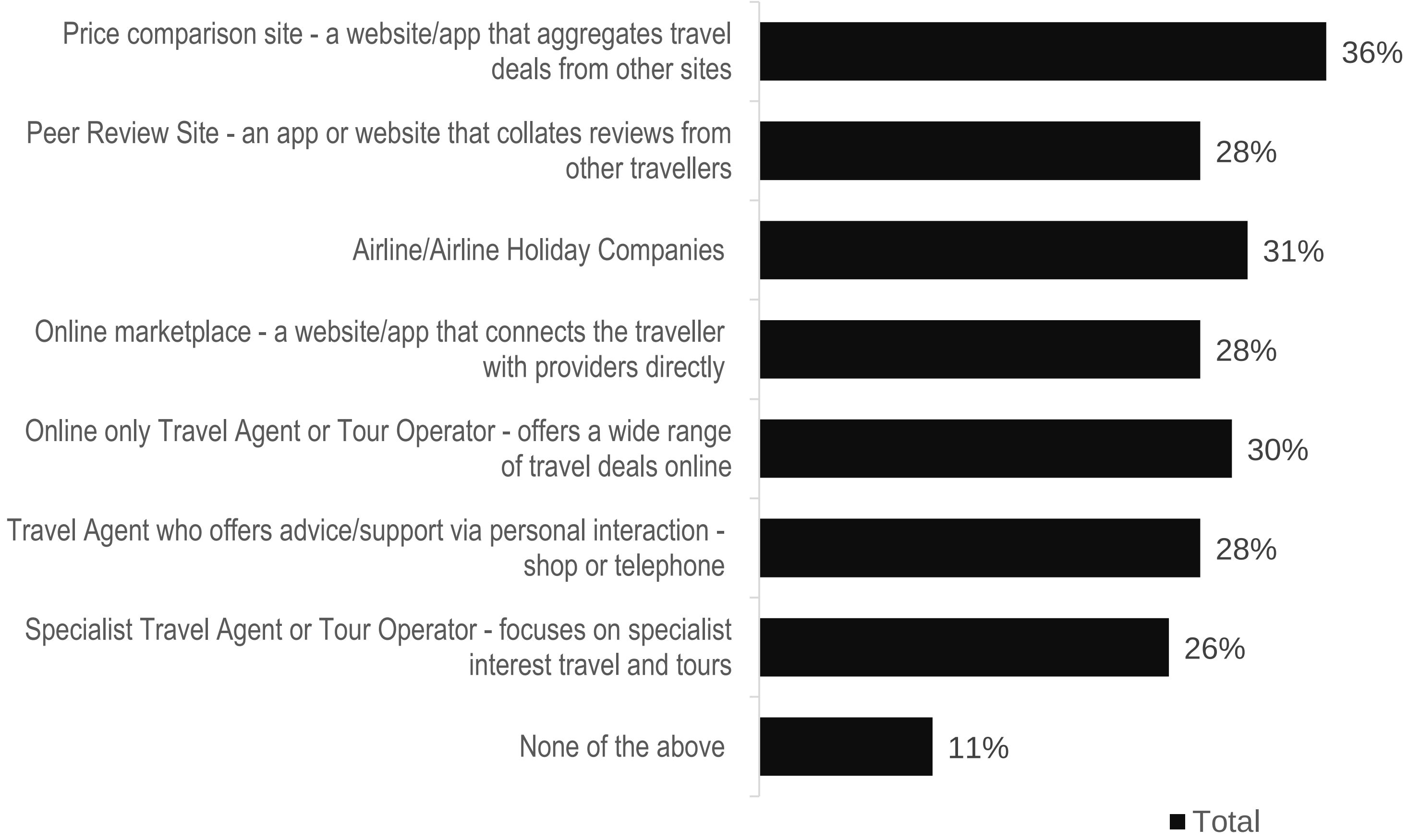
NB: Respondents were shown market specific examples to help them understand the categories. North America values aren't shown because there aren't significant differences vs global average

What happens in the next phase?

Inspiration, Deciding, Planning & Booking

And similar patterns are also observed in the Planning & Booking phase

Resources Used In The Planning Phase of the Customer Journey
(ordered to be consistent with the Inspiration phase for easy comparison)



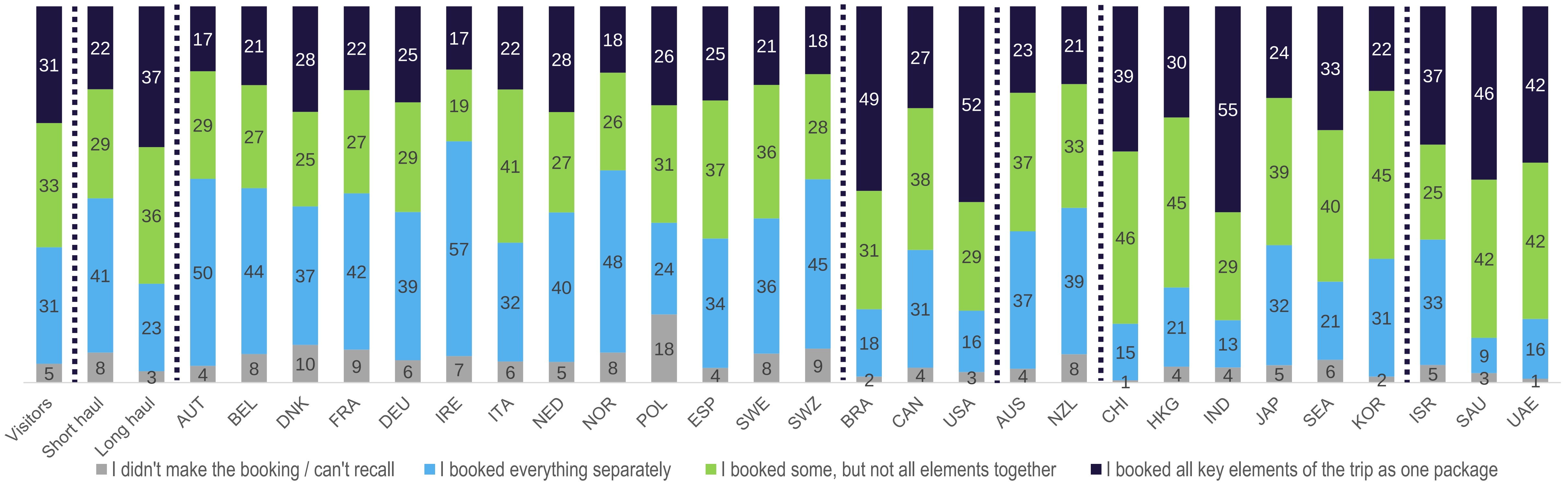
I2: Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages? Multiple Response
Base: Total Global N=22,840, 677 Weighted.
Blue numbers are significantly higher than comparative base @ 95% confidence

Around one-in-three booked as a package to Britain, with short-haul markets tending to book elements more independently

Tourists from the Americas and India are disproportionately likely to book as a package, with the Middle East also mirroring this tendency.

Booked elements	One package	Some together	All separately
Total - Visited Britain	31%	33%	31%
Total - Visited elsewhere	32%	30%	30%

Booked key elements of leisure break / holiday to Britain – by market

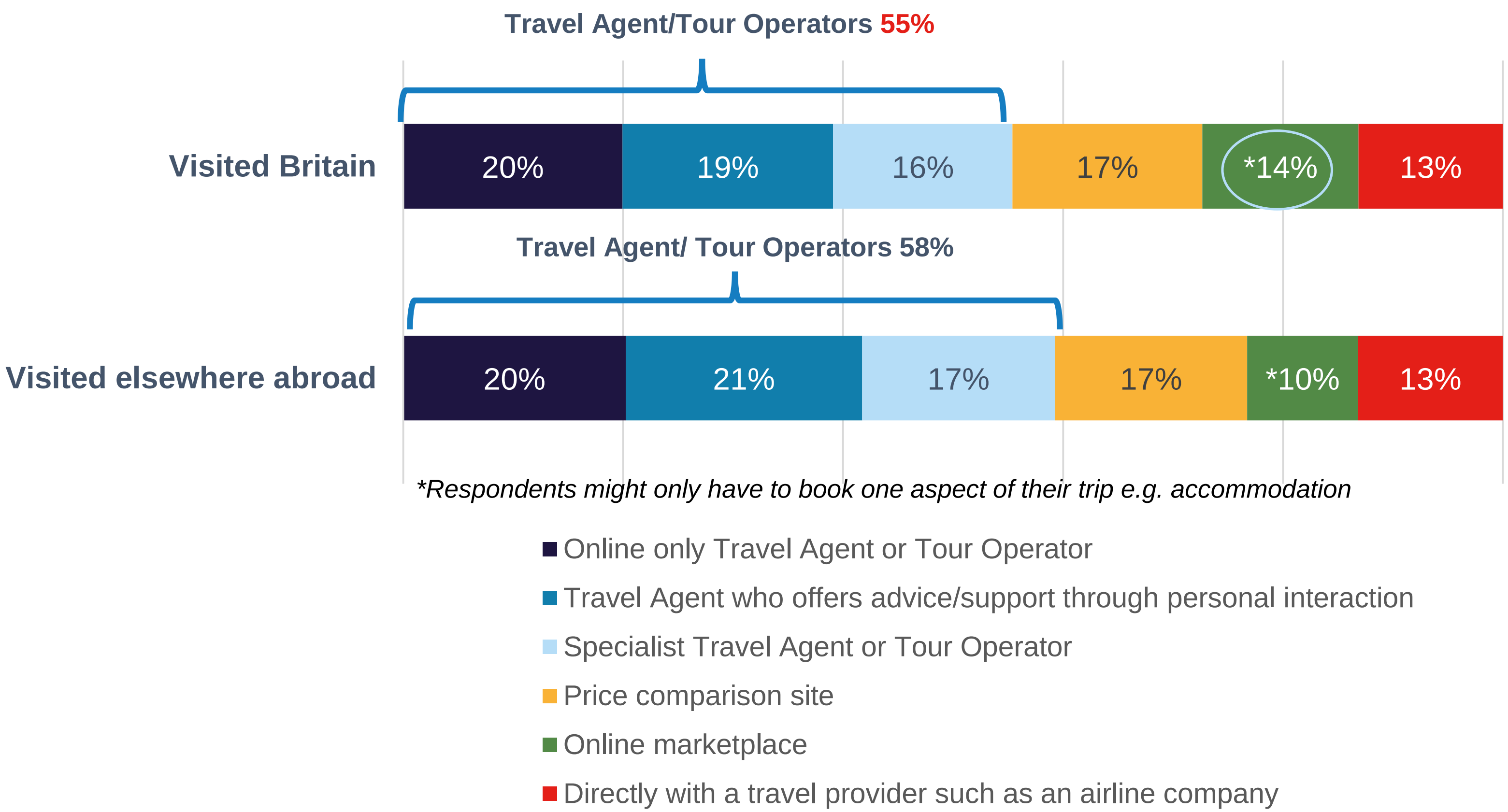


I3: And thinking about this break or holiday to Britain, which of the following is true when it came to booking the elements of your trip.
Base; Visited Britain; N=8,497; Visited Elsewhere Abroad N=9,662; global weighting applied. Countries unweighted
Circled numbers are statistically higher @ 95% confidence

Packages are mostly booked through travel agents/tour operators, with online marketplaces low but more common for Britain packages than other destinations and especially so for visitors from India

It is important to note the importance that offline Travel Agents continue to have within the booking phase.

Main resource used when booking as one package to Britain

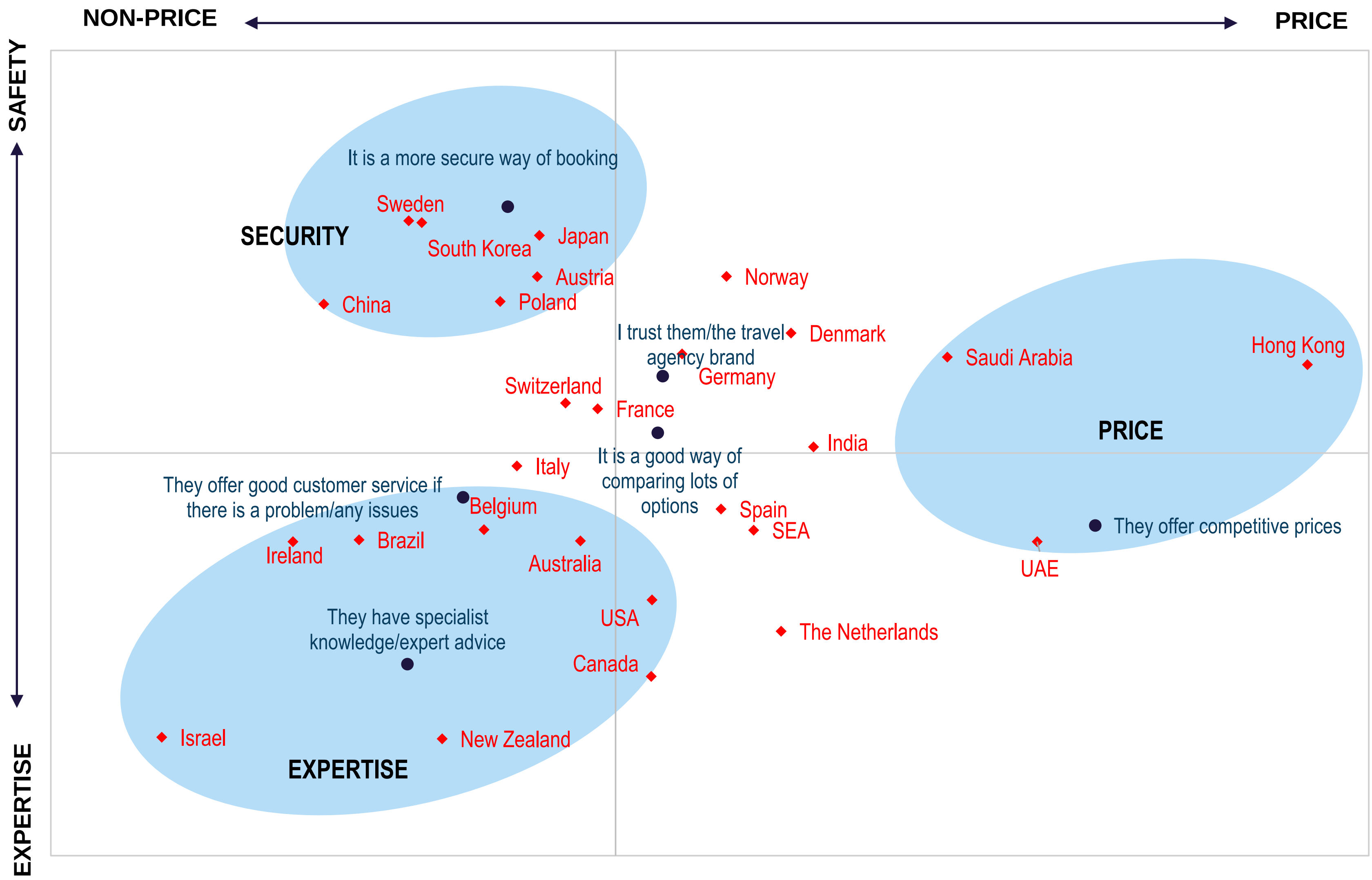


For the main markets that book as a package to Britain:

- **Saudi Arabia** less likely to personally interact with a travel agent (13%) and more likely to deal directly with an airline (17%) when booking a trip to Britain
- **India** visitors used online marketplaces (21%) more than any other place
- **Brazilians** relied heavily on travel agents (68%) and especially specialist operators (22%)
- **UAE** visitors turned to online travel agents (25%) and price comparison sites (23%)
- **China** employed specialist travel agents (21%)
- No unique differences for **USA**

I4: And which of these best captures how you booked your [package] trip?
Base Weighted Global Package bookings N=.7,082; Visited Britain N=2,594, Visited elsewhere abroad N=3,083

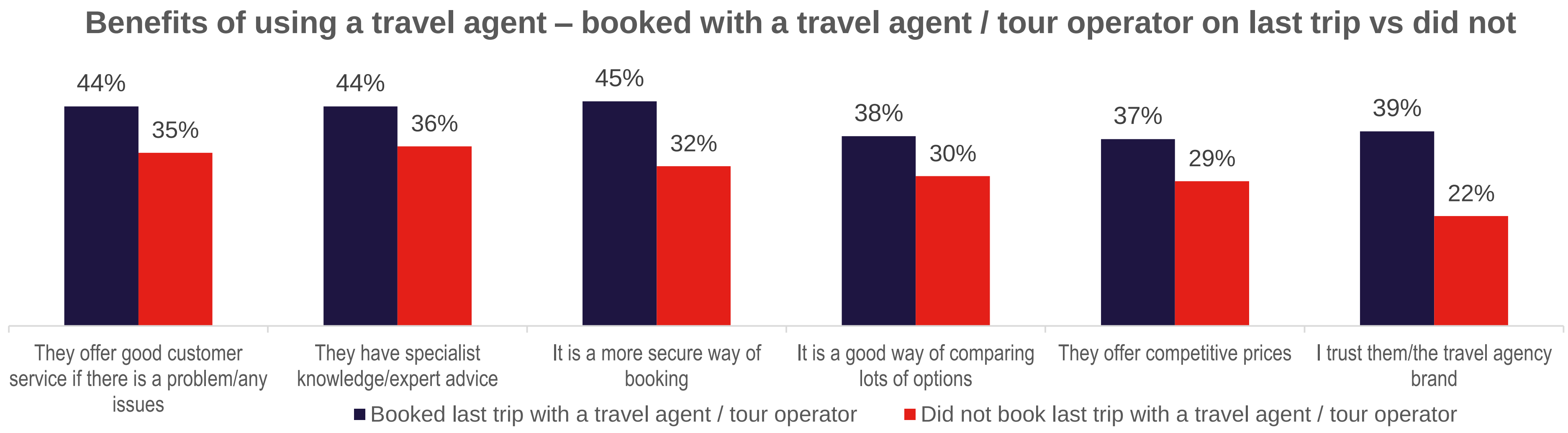
Markets have different perceptions when it comes to the benefits of using travel agents



- The two most commonly perceived benefits of using a travel agent, **delivering expert advice and customer service** if problems arise, are strongly held for travellers from **the Americas, Oceania, Israel, Belgium and Ireland**
- Travelers from **North-East Asia, Poland, Austria and Sweden** had stronger beliefs that travel agents offered a **more secure** means of booking
- Those from **UAE, Hong Kong and Saudi** viewed travel agents strongly on **offering competitive prices**
- In **India** where travel agents are particularly popular, they are seen to deliver multiple benefits.

I7: What do you see as the main benefits of booking through a travel agent?
Base; Total Global N=22,840. Base sizes by country (refer sample pages) no weighting applied

And perceptions are correlated to usage when it comes to Travel Agents/Operators, even though we cannot infer causality



Using the tourist's last trip as a measure of recent experience, we see that those who used a travel agent or tour operator when booking their trip tend to view travel agents more positively

I7: What do you see as the main benefits of booking through a travel agent?
Base: Total Global N=22,840. Used a Travel Agent N=10,536, Did not use a Travel Agent N=12,304. Weighted
Blue numbers are statistically higher than other ages, red are significantly lower than other ages @ 95% confidence

Europe has a lower tendency to use travel agents / tour operators to make travel and accommodation bookings

Difference in usage of intermediaries by region versus global average (statistically significant differences shown)

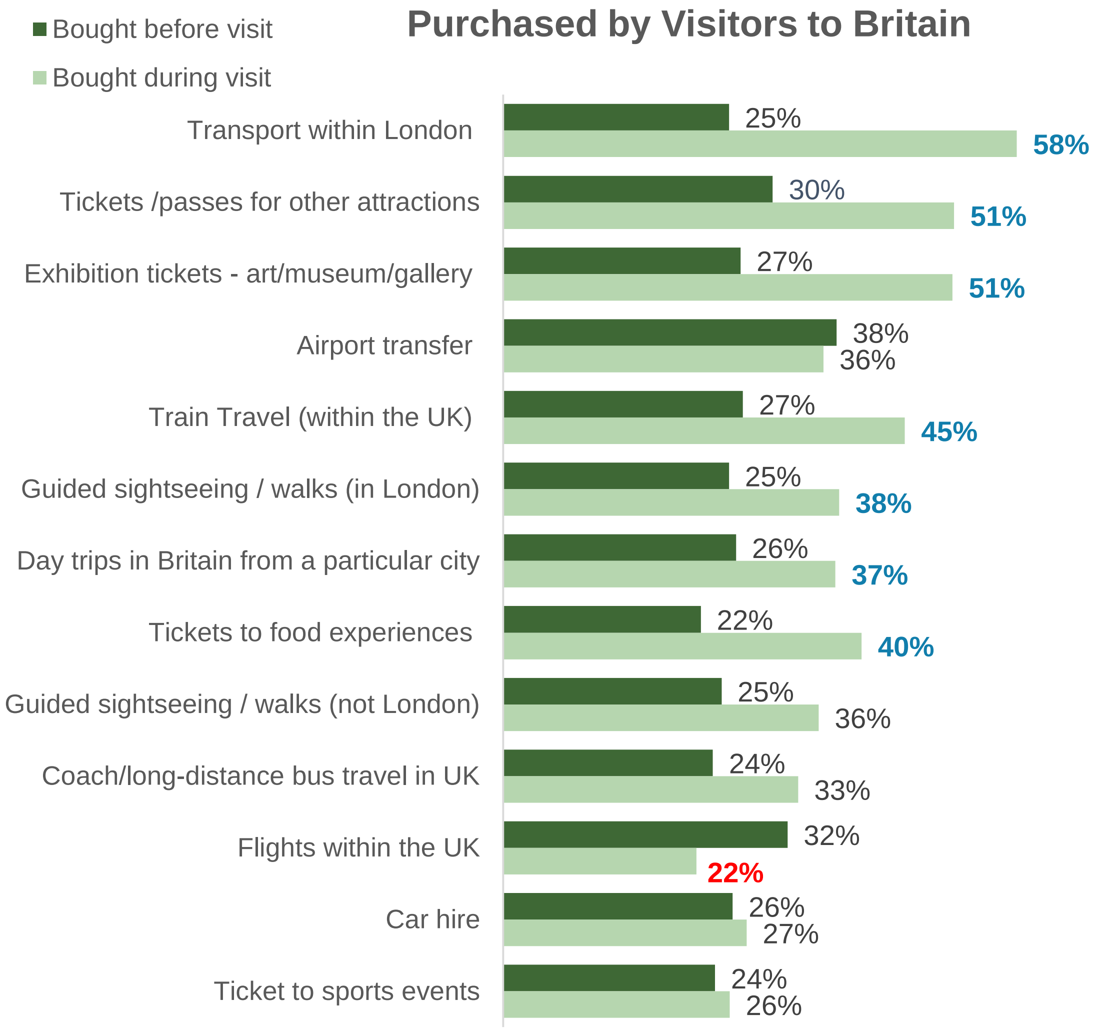
		SE Asia	South Asia	NE Asia	Middle East	South America	Oceania	North America	Central Europe	West'n Europe	Sth'n Europe	Nth'n Europe
PACKAGE	Price comparison site					-4				-6		-5
	Directly with travel provider e.g. airline			-4		-6	+5		-4			
	Online marketplace		+7				-5					
	Online only Travel Agent/Tour Operator						-6			-5		+7
	Travel Agent - shop or phone				-4	+7	+11		+5			
	Specialist Travel Agent/Tour Operator			+7					-6			
TRAVEL	Price comparison site	+6	-6				-6				+5	
	Directly with travel provider e.g. airline	-6	-13	-6	-5	-11	+6	+5		+5	-7	+8
	Online marketplace		+4	-4			-4				+7	
	Online only Travel Agent/Tour Operator	+8	+9	+6						-5		
	Travel Agent - shop or phone		+7	6		+7	+11			-4		-4
	Specialist Travel Agent/Tour Operator		+4	+5		+7			-4			
ACCOMMODATION	Price comparison site	+6	-6		+5		-4				+4	
	Directly with accommodation e.g. hotel	-5	-12	-7		-7		+5			-6	+6
	Online marketplace			-5							+5	
	Online only Travel Agent/Tour Operator	+7	+7	+8						-5		-4
	Travel Agent - shop or phone	-4	+8			+8	+6					-4
	Specialist Travel Agent/Tour Operator		+6	+5								

- Travel agents popular for tourists from **South and North East Asia** when booking travel and accommodation and across all three forms of bookings for **South Americans**
- While much of Europe has a lower tendency to use travel agents, **Central Europeans** do use traditional travel agents especially if booking a package
- Airlines and traditional travel agents are more prominent for those from **Oceania**
- Online only travel agents are used more across **Asia** for travel and accommodation, as opposed to booking directly with providers

North America values aren't shown because there aren't significant differences vs global average

I4: And which of these best captures how you booked your [package] trip? I5 And which of these best captures how you booked your travel to and from [DESTINATION]? I6. And which of these best captures how you booked your accommodation in [DESTINATION]? If you made multiple bookings, please select the MAIN one that applies.
Numbers are statistically higher than the average @ 95% confidence
Where cells have no figures, this is because there are no significant differences to report (i.e. in line with global patterns)

Visitors are more likely to buy transport and tickets other than internal flights once they have arrived in Britain, although around half of buyers are still buying these prior to arrival



Nett Purchased
80%
76%
73%
69%
68%
60%
60%
59%
57%
54%
51%
50%
47%

- Flights and airport transfers were most often pre-purchased prior to the trip
- **European** visitors were generally less likely to purchase across all categories, although visitors from:
  - Poland had a greater tendency to buy tickets to food experiences (69%)
  - Spain were more likely to buy London transport cards (87%) and airport transfers (78%)
  - Sweden generally bought flights for within the UK (84%)
- **Oceania** visitors were more likely to purchase train travel for within the UK (74%) and hire a car (53%)
- Visitors from **Asia, Brazil and North America** had a higher tendency to purchase across all activities / forms of transport

I8: Did you buy the following when you visited Britain?
Base Total Visitors to Britain N=8,497. For countries no weighting applied
Blue numbers signify that bought during the visit is statistically higher than bought before visit @ 95% confidence; red numbers are significantly lower

The role of word of mouth and buzz from friends and family fuels and inspires tourist behaviour, regardless of destination. Digital content from travel sites, **social media and National Tourism Boards** also stimulate and spark inspiration, along with the lure of securing **bargain deals**.

Compared to other destinations, **travel inspiration for Britain** is ignited more by **sporting events** and **international movies or TV** programmes.

In the deciding phase, **priced resources** (comparison sites, airline or tour deals) become increasingly influential.

Tourists travelling long haul are more likely to **book elements of their trip to Britain together as a package.** Similarly, we see different market propensity towards to package bookings.

Use of intermediaries such as **Travel Agents and Tour Operators remains high**, including offline interactions, with half of global tourists using their services for package booking. Their role is particularly strong in the deciding and booking phase, helping provide trust, best price and reassurance.

Airline partners are similarly more important in this phase, particularly in booking the travel-related elements and especially for long-haul markets.

In Summary

A combination of resources and partnerships are used by tourists to inspire, decide and book their trips, including once they are on-the-ground in Britain

10 Pulling it All Together: Summary & Implications

Demand is back for global tourism and Britain remains a priority destination, even for those who have recently visited.

Value for money has become the dominant driver and remains a *perceptual* weakness for Britain. We expect value to continue to increase in importance and tourists are looking for ways to mitigate financial risk in a post-pandemic environment.

Britain's strength as a destination choice lies in its (iconic) **diversity of history and modernity in one, easy to navigate place**. A brand framework is derived from the study, including identification of important regional flexes.

Visitors to Britain discover it to be **easier, more affordable and more welcoming** than perhaps expected – how can we leverage their experience more knowing the importance of WOM in the early phases of the tourism journey?

Emerging themes of **wellbeing, sustainability and inclusivity** are becoming a stronger priority, but **each needs more work** in terms of truly understanding what they *could* and *should* mean for British tourism. Adding to the current brand footprint, these elements will add warmth, surprise and uniqueness to our brand offer.

Within a wide array of inter-personal and digital sources, **partners remain a key source of inspiration, information and trust** throughout the stages of the tourism journey and package bookings remain particularly strong for some of our largest inbound markets.

In Summary

A great opportunity to reignite brand Britain across the tourism journey in ways that are sufficiently unexpected and smart in order to capture the hearts, minds and wallet of the global tourism market

Implications for the British Tourism Industry

Demand for international leisure travel is high post the pandemic and, within this mix, Britain, a well-established tourism destination, is well placed amongst those willing to travel.

Italy and Spain stand out as key European holiday destinations Britain needs to compete against in terms of level of short-term intent to travel, whilst **USA and Australia** remain strong competitors for long-haul markets in particular. A high proportion of long-haul travellers, in particular, will wish to combine a trip to Britain with one to Europe, so a strong opportunity exits to view Italy, Spain and other European destinations as allies rather than competitors when targeting long-haul travellers.

Markets where we see most immediate potential (high consideration, propensity to visit, combined with a degree of urgency), include **Hong Kong, China, Saudi Arabia, UAE and USA**. Visitors from **Ireland** show even more immediate potential without the need for specific marketing, due to geographic and cultural proximity.

This does not mean other markets should not form important priorities. Indeed, markets beyond this represent more complexity as well as opportunity through marketing across different stages in the customer journey. A clustering map is provided in this report highlighting where emphasis needs to be on either driving demand or creating a sense of urgency or preference over competitors.

Demand Summary

We see evidence of strong demand for international travel and Britain fares well as an established and iconic destination across the board, as well as within specific markets and sub-segments of interest.

Demand Forecasting

Demand seems high, not only from Considerers after the pandemic, but also from recent visitors to Britain who may not have had the 'full' experience of Britain available to them in a pre-pandemic world.

Questions have been posed as to how long this increased demand will last for.

Key considerations in a post-pandemic environment are around **flexibility in bookings, including the opportunity for financial compensation** (which also extends to insurance options).

This **doesn't mean health and safety issues are no longer relevant** – they are very much at the fore of travellers' minds, so reassurances around access to healthcare and a culture that takes the issue of health seriously are still important elements underpinning tourism offers.

Demand is not only high for Britain Considerers (those who have not visited Britain in the past 5 years), but **propensity to visit is even higher for recent visitors to Britain than it is for Considerers**. This is a particularly unique phenomenon, as usually we see limited desire to re-visit a destination amongst recent visitors. We therefore conclude that **the pandemic may have lent itself to 'short-changed' experiences**, in that visitors may not have felt they were able to fully enjoy their trip to Britain in the same way they would have liked to in a COVID-free context.

If this is true, there may be a **strong, but short term, opportunity to market directly to recent visitors to encourage them back to enjoy Britain to its fullest** and in a way free from fear or the limitations tourists have endured in recent years.

We have also been asked about whether **visits to family and friends**, as a reason for international travel, will drop off quickly now that tourists have been able to fly for some time.

Again, while there is no evidence, per se, within the MIDAS data, we do see a **significant proportion of trips (12%)** being taken with the explicit purpose of visiting family and relatives (VFR) and **Britain over-indexes on this holiday type (16%)**, particularly for tourists from **Ireland** (44% of trips to Britain), **New Zealand** (43%), **Poland** (39%), **Australia** (29%) and **Canada** (24%).

With these numbers in mind and recognising that travellers are (a) likely to have multiple friends and relatives to visit, and (b) many have not travelled internationally since the pandemic, it seems **reasonable to conclude that there is still a period of friend and relative reconnections ahead of us** as an opportunity to attract visitors to Britain.

One of the consistent challenges with the VFR audience is driving accretive revenue. One of the learnings we can offer is that **VFR visitors actually stay 22% longer** (11 nights vs 9) in Britain*, so **encouraging domestic trips or a wider range of activities whilst visiting family and friends** should certainly ensure the additional time contributes to economic additionality.

Visiting Friends and Relatives

1 in 6 visits to Britain in the past 5 years were for the main purpose of visiting friends and relatives.

With post-pandemic demand for international travel still strong, we anticipate this opportunity will continue for some time.

Due to sample, timing and methodology differences, these numbers differ from the official statistics in the International Passenger Survey, but the overall point about VFR visitors staying longer is still consistent.

It would be naive to talk about demand without also commenting on supply considerations, given the travel industry faces **pressure to meet demand as we recover from the pandemic**.

MIDAS did not include questions on supply considerations such as availability and cost of flights, rail or ferries, accommodation or hospitality services. In the months following the fieldwork, however, these factors were important for many tourists with **labour shortages and supply pressures as well as widely publicised travel disruption**.

With so much pent-up demand and emotional energy at stake, these disruptions combined with **higher fares and European heatwave/wildfires created a unique industry environment for tourists in 2022**.

It is possible that these events may **dampen the enthusiasm** at peak times for those who have not already planned and committed to holiday travel. This might mean the season for **inbound tourism to Britain becomes more extended** than anticipated which, in turn, might have positive repercussions, particularly around **seasonal spread and ensuring a more sustainable tourism footprint**.

Supply Considerations

Post the fieldwork period, some travellers have been subject to disruption to travel, with the industry facing challenges in costs and staffing.

This may have a delayed impact on tourism recovery, but equally, could encourage greater seasonal spread.

With competitive pressure to attract tourists at its peak, one of the questions we need to consider is how to drive a sense, amongst global tourists, that Britain is a place they must visit NOW.

Britain suffers, perhaps disproportionately, when it comes to generating a sense of urgency for visitors. This is the flip side of being a country with such strong history and heritage as these attributes are associated with stability and longevity. As a result, Britain is seen to be ‘always there for me when I’m ready’, rather than a destination one should plan for with a degree of urgency.

Looking at the immediacy index, we see **some countries such as Ireland, Hong Kong, China, Saudi Arabia, UAE and USA represent markets where there is relatively more urgency and prioritisation over other destinations**. Of these, China, Saudi Arabia, UAE and USA also represent opportunities to attract a more premium tourist, whilst some of the European markets might be an opportunity to ‘trigger’ urgency through deals and promotions.

When it comes to creating a sense of urgency, we need to understand **WHY destinations are suddenly seen as a place to visit with urgency**. There are several intuitive answers to this question. We discuss this in more detail on the following page.

Urgency & Purpose

Britain is not always at the front of the list when it comes to creating a sense of a place one must visit NOW.

As such a well-established destination, we may need to look at different markets or consumer types to create this sense of urgency.

There are many reasons a brand can be seen as a 'must have' experience to drive demand urgency, ranging from popularity through to time-bound events and experiences.

To understand more about creating a sense of immediacy, it useful to borrow the principles of **Anticipation Marketing**[1] which are used by companies such as Apple to generate heightened levels of excitement prior to a product launch. These include, amongst others, ideas around:

- **Scarcity** – creating a sense of deliberate limitation (i.e., secret events with limited tickets)
- **Cult of First** – appealing to the human/social desire to be amongst the first to experience something new in Britain (now a common influencer model);
- **Group Narcissism and the concept of 'otherness'** – can we tap into tourism as we might see football culture, creating deep and emotional alignment which could fuel a fun debate between tourists

Another avenue for enhancing excitement is to focus on **event 'expansion**' both across time, but also across different 'themes' events can apply to. An event such as the Women's Football Euro 2022, for instance, can have longevity through linking the experience of local football culture which is relevant far beyond the event itself.

Similarly, people create often artificial 'excuses' for putting something big like a trip to Britain off into the future. We do this unconsciously, as 'comfort' is more instinctive human behaviour than embracing change and uncertainty. This means people are usually not aware that the 'reasons' they think are very rational and prevent them from committing to a trip are usually preventing them from experiencing something incredibly rich and emotional. **Tapping into this feeling of being released from one's own constraints** is another interesting angle to consider in marketing Britain to prospective tourists.

[1] *https://ana.esomar.org/documents/anticipation-marketing*

Anticipation Marketing

We can borrow strong learnings from brands with a successful track record in creating a heightened sense of anticipation to help overcome this inertia.

The perception of Britain is dominated by its **unique mixture of old and new, of where history and heritage meet the vibrancy and modernity of exciting towns and cities**.

Within this mix, being able to explore multiple world-famous attractions, 'must-see' sights and fulfil a variety of experiences within easy reach is the dominant theme we have called, **'Freedom to Experience'**. It forms the core and strong foundation of brand Britain seen through the eyes of prospective and recent tourists.

In addition to this core, Britain has a secondary range of perceptions, some of which are currently stronger than others, but each contributes to an overall sense of **'Inviting Warmth'**. These include both rational elements one expects from an inviting destination ('easy to get to'), but also emotionally inviting elements such as being seen as welcoming, inclusive and accessible and full of interesting people and cultures.

Building on this hierarchy of brand perceptions is a smaller range of attributes which are seen as important to tourists, but Britain isn't currently seen as delivering as strongly on. These include elements such as being seen as a relaxing place to visit or having a good variety of food and beverage options or being good to visit all year around. Because they are not currently as well associated with Britain **these elements can offer the opportunity to surprise and delight tourists** and could be well delivered by unique products or experiences.

The **Archilles Heel for brand Britain is its weak perception on 'Value for Money"** (although this is also a relative weakness for key competitors). As an industry, we need to find smart ways to overcome this significant barrier, particularly in light of the worldwide cost of living crisis. We discuss this theme further, as evidence points to it being a key priority for our industry.

Brand Britain

Brand Britain has unique and powerful strengths in its ability to present a convenient juxtaposition of heritage and modernity, supplemented by a strong sense of being inviting (both rationally and emotionally). In order to create desire, however, the perception of poor value for money must be addressed with relative urgency.

Value For Money

Facing a global recession and suffering poor perceptions of 'value for money', Britain must find novel ways to deliver value to inbound tourists.

As already pointed out, Britain suffers from **weak associations with Value For Money** (although this is also a relative weakness for key competitors). Part of this perception is driven by the expectation that famous cities such as London, (epicentre of the 'must see' sights), are disproportionately expensive. By focussing on communications that help to **create the impression of the pound 'going further**' or being strong enough to 'experience more' could be a strong reframe of the value equation, particularly for those seeking to do a lot on their holiday.

Providing economically-frugal tourists more itineraries that dial up the number of 'free' sites and experiences and showcasing just how far their money might go might help to manage this perception, particularly in light of the cost of living crisis.

We might also be able to **use the economic climate to speak more to geographic and seasonal dispersion**, for example encouraging tourists to visit during off-peak periods.

Participation is a key trend we identify for younger travellers, particularly as a way to take manage finances whilst travelling abroad. Whilst Brexit has challenged the potential for many younger tourists to work in Britain on their travels, there are other existing and emergent shared economies (work for board, couch-surfing apps, etc.) that budget travellers might use during this period.

The flip side of value for money is the **growth in premium and luxury travel**.

We have observed, during COVID-19, a massive surge in luxury industries as consumers have been deprived of holiday travel, entertainment and other out-of-home purchases.

Many tourists will wish to indulge themselves with premium holiday investment. This might be a **fruitful opportunity for Britain**, particularly if bespoke and personalised experiences can be incorporated.

We identify **30% of tourists fall into the 'premium' segment** (8, 9 or 10 out of 10 on a scale where '10' = likely to be a super premium tourist in Britain). They are more likely to be Experience Seekers and to come from markets such as **Saudi Arabia, China, UAE, Brazil, India, South-East Asia and USA**.

Luxury travellers will continue to be demanding in terms of products and services but still able and willing to pay for them. Many of these markets are also **highly engaged with intermediaries to support package bookings**, so there seems to be plenty of opportunity for product and brand development around culturally-relevant itineraries.

We should also not be dismissive of the **role of families and children** within this premium group of travellers, as a third travelled with children on their last break or holiday abroad and seek different experiences and accommodation options as a result.

Premium Travel

Converting the opportunity presented by premium or luxury travellers will also bode well as a recession-proof strategy.

Britain's is well positioned to offer prestigious and luxury experiences to premium travellers and their families.

The nature of international leisure travel is changing, and not all of these changes are directly attributable to the pandemic, yet some have been heightened by it.

The three key trends we review within MIDAS include: **Wellbeing, Sustainability and Accessibility and Inclusion.**

The wellbeing benefits of holidays and breaks are well recognised, and the pandemic has created even more of a respect for valuing this benefit. We expect, therefore, to see an **increased degree of mindfulness around holiday bookings**, particularly for **women, those with kids, full-time employed and living busy lifestyles**.

At the same time, we must be **cautious not to assume 'Wellbeing' means spa resorts and yoga retreats**, as evidence shows it can mean quite different things depending on the individual.

As an emergent trend, there is still plenty of exploratory work to be done in defining what this could mean and how it might best be used as a hook across the customer journey, but it is important to start thinking about now, particularly as it suggests a **very different competitive set and, potentially, style of offer**.

Emergent Trends

Wellbeing is a key trend which the pandemic experience has heightened. Tourists will be travelling for mental, emotional and physical recharge and Britain will face a new series of competitors as this trend develops.

Sustainability is another key trend we are witnessing, particularly in light of the devastation caused by global warming.

While it is more relevant to **younger tourists and Experience Seekers in particular**, the strength of the narrative around climate change is so strong we anticipate it will quickly become a mainstream need and decisional influence.

Most tourists are already engaging in some time of sustainable tourism behaviour such as buying local or supporting destination communities; however, there is appetite, within these same tourists, to do more.

Cost is perceived as a barrier to sustainable choices, but we also note an absence of clear sign-posting and behavioural rewards for sustainable choices. **Building infrastructure and communication signals which are clear, consumer-friendly and trustworthy** will be essential to help inform and reward tourists and tourism providers.

Emergent Trends

Sustainability is at the fore of young-travellers' minds in particular and, as the trend continues, will likely play a key role in the destination and service decisions they make.

A quarter of travellers take breaks or holidays with an accessibility need or a travelling companion with one.

For tourists with accessibility requirements, **Britain is perceived as accommodating and inclusive**, although there are obviously **still many opportunities to improve our offer and its communication** to be fully inclusive.

Inclusivity also impacts the LGBTQIA+ community and ethnic minority tourists. Around **1 in 10 tourists associate with the LGBTQIA+ community** and these travellers also feel that Britain is inclusive and accessible to their needs, although there is still a deficit between their perceptions of welcoming and those of the general tourist population (although this is also the case with some other destinations). This implies there **may still be some emotional barriers to feeling fully accepted and welcome** – elements of Britain’s tourism offer that are essential to continue to build upon.

Inclusion, in particular, is an emotional feeling that relies on authentic connection. When it comes to campaign imagery, we need to be respectful that many disabilities are invisible, as is sexual orientation, whilst gender and ethnicity are also far from binary in the 2020s.

Emergent Trends

Accessibility & Inclusion are key elements for Britain to ensure we offer rational solutions to, but also speak to emotionally and appropriately in marketing communications and activations.