AUSTRALIA EXPERIENCE SEEKERS PEN PORTRAITS

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

AUSTRALIA EXPERIENCE SEEKERS (26%)

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

Propensity to travel
(vs Australian total traveller population)

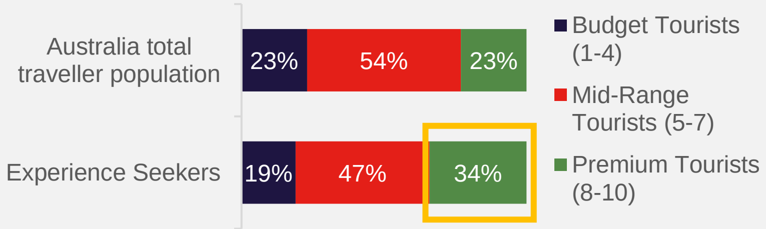
Britain **7.1** (vs **6.6**)

Anywhere internationally **6.2** (vs **5.4**)

Top Holiday Types Preferred (share of preference)

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

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



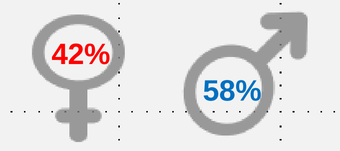
Priority Experience Seekers are trend endorsers (vs total):

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

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

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

GENDER



SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

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

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

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

TOP DRIVERS OF DESTINATION CHOICE:

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

KEY PERCEPTIONS OF BRITAIN:

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

TOP ACTIVITIY PREFERENCES:

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

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

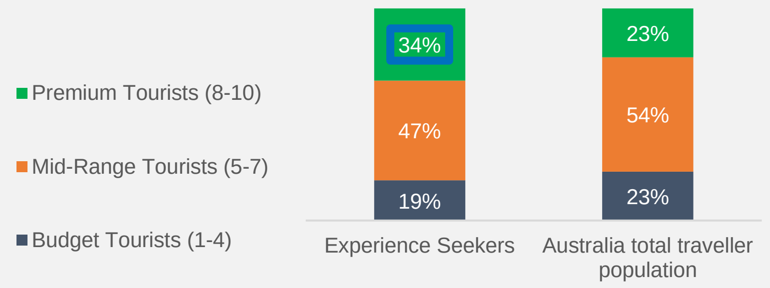
USA (46%) **ITALY (42%)** **FRANCE (40%)** **SPAIN (38%)** **GERMANY (34%)**

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

AUSTRALIA EXPERIENCE SEEKERS (26%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

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



TREND ENDORSERS (vs total)

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

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

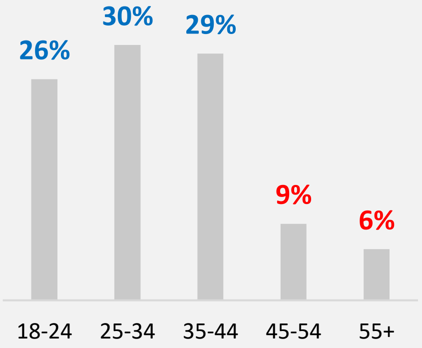
Inclusion seekers **24% (-1%)**

LIVING

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

AGE

*Modal age: 22 yrs
Median age: 32 yrs



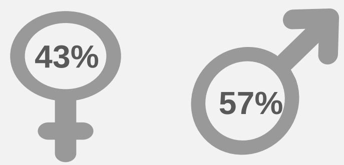
Age with the highest frequency

VISITORS (vs total)

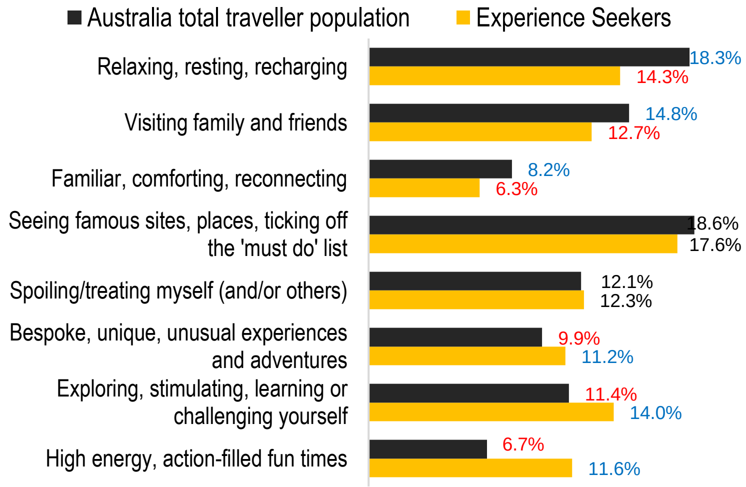
Britain Visitors (P5yrs) **37%**

Considerers (P5yrs) **63%**

GENDER



TYPES OF HOLIDAYS:



SOURCES OF INSPIRATION (BIGGEST SKEWS):

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

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

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

*KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

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

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

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

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

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Australia total)

Disproportionately more likely to consider…

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

AUSTRALIA: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

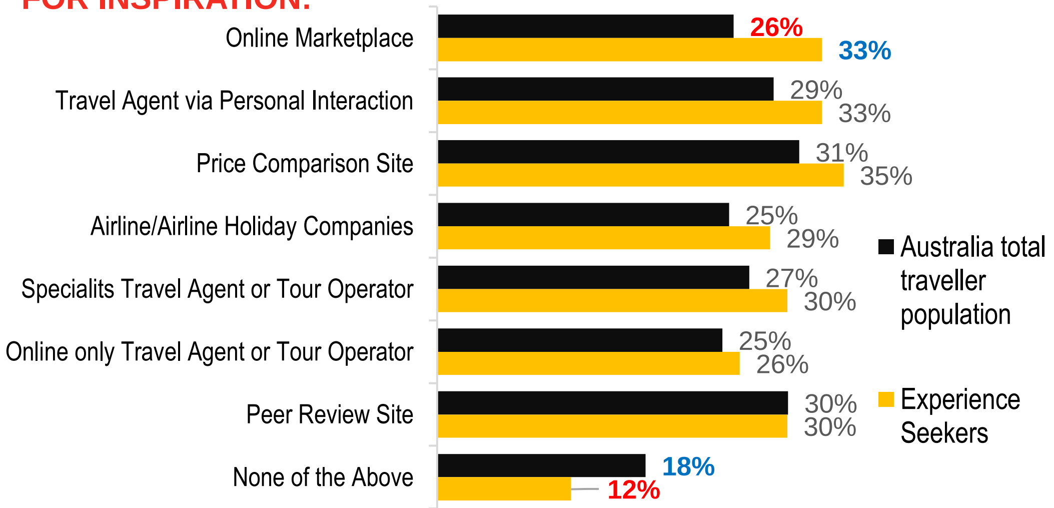
Experience Seekers show a higher usage of price comparison site in their planning & booking phase, alongside greater use of airline/airline holiday companies. They are also being driven by bargains/deals more than we see in non European markets

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

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

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

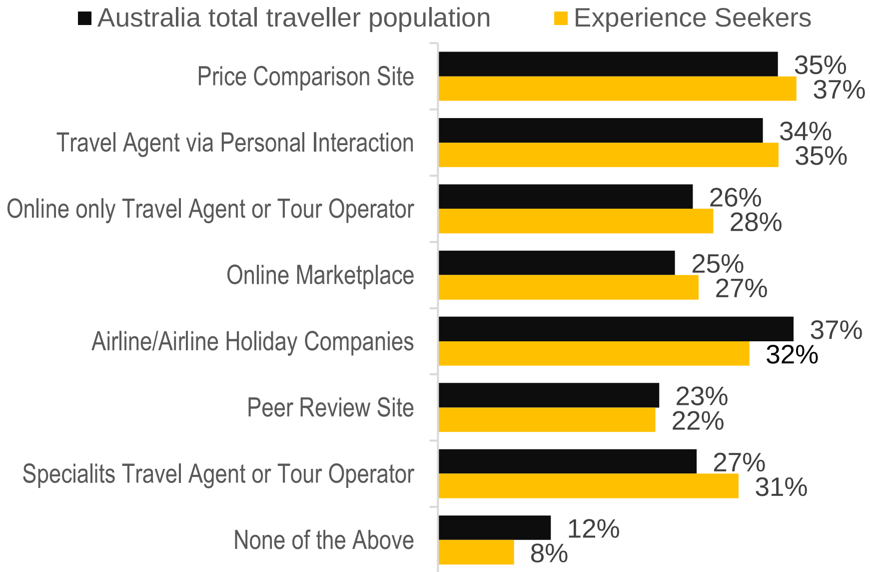
RESOURCES USED FOR INSPIRATION:



TOP INSPIRATIONS:

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

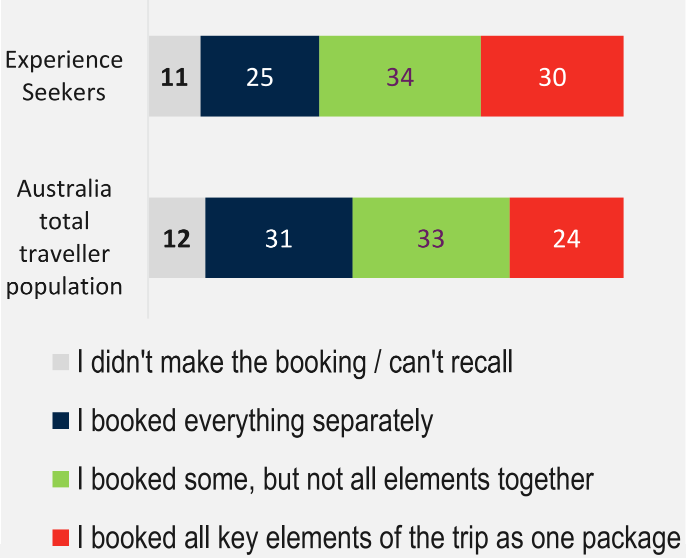
RESOURCES FOR PLANNING:



TOOLS:

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

PACKAGE VERSUS SEPARATE BOOKINGS:



EXPERIENCE SEEKER BOOKING HABITS:

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

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

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

HOW TO READ THE PEN PORTRAITS

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

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

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

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

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

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

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

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

EXAMPLE

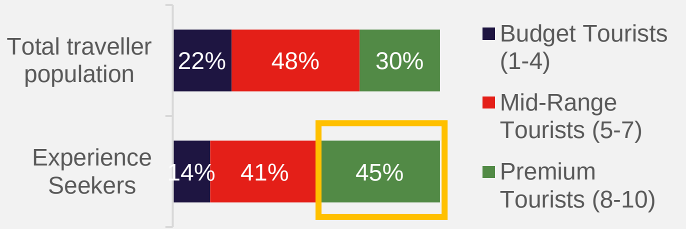
Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to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

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

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

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

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

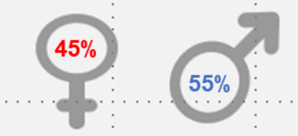


The data from which the sub-segment of Priority Experience Seekers are identified (highlighted by the gold box)

PRIORITY Experience Seekers are trend endorsers (vs total):

Wellbeing involved **23% (+8%)**
Sustainability engaged **40% (+19%)**
Inclusion seekers **40% (+15%)**

GENDER



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

EXAMPLE

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

The top kind of holidays preferred by this segment

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

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

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

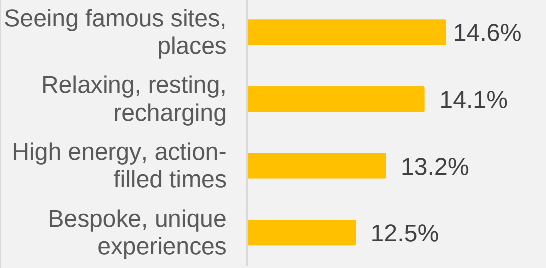
The top destinations based on propensity to visit scores (8,9 or 10 on a 10-point scale), but excluding Britain (biased because we only spoke to considerers of Britain)

Propensity to travel (vs Global total)

Britain 7.5 (vs 6.8)

Anywhere internationally 6.4 (vs 5.5)

Top Holiday Types Preferred (share of preference)



SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

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

TOP DRIVERS OF DESTINATION CHOICE:

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

KEY PERCEPTIONS OF BRITAIN:

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

TOP ACTIVITIY PREFERENCES:

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

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

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

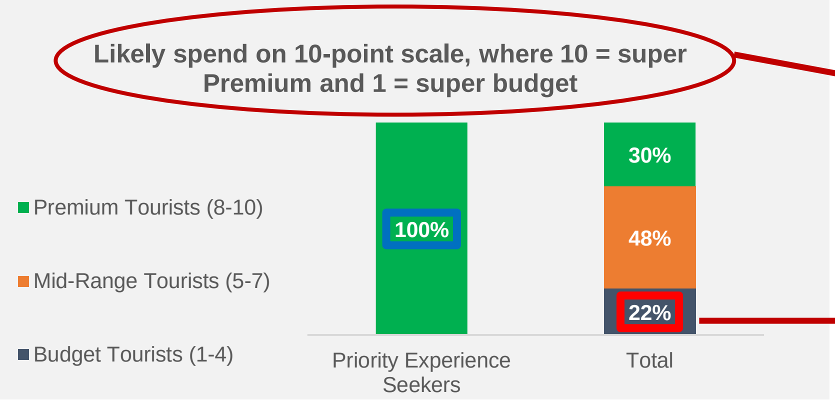
TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

Likely to consider…

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

EXAMPLE

SPEND POTENTIAL AS VISITOR TO BRITAIN:

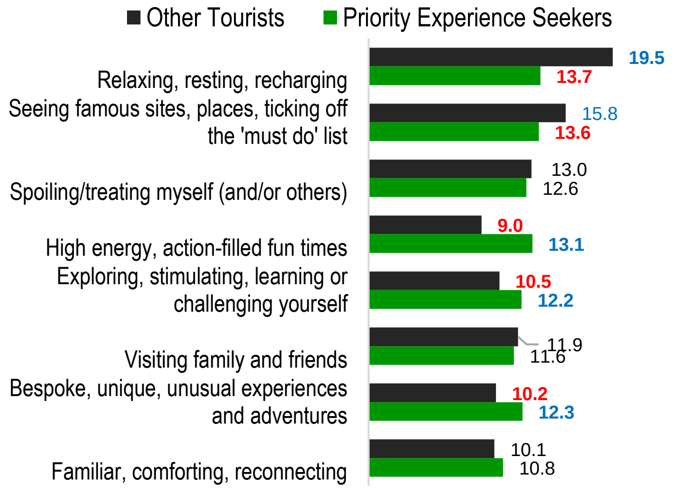


This chart compares the target segment with the total population of tourists based on the question of what type of tourist they would be if visiting Britain.

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

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

TYPES OF HOLIDAYS:



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

SOURCES OF INSPIRATION (BIGGEST SKEWS):

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

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

EXAMPLE

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

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

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

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

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

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

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

TREND ENDORSERS (vs total)

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

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

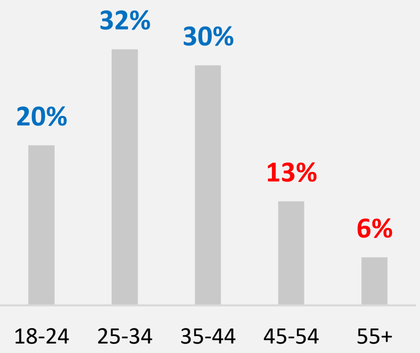
Inclusion seekers **40% (+15%)**

LIVING

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

AGE

***Modal age: 34yrs**
Median age: 36yrs



**Age with the highest frequency*

VISITORS (vs total)

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

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

GENDER

45%

55%

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

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

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

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

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

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

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

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs global total)

Disproportionately more likely to consider…

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

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

EXAMPLE

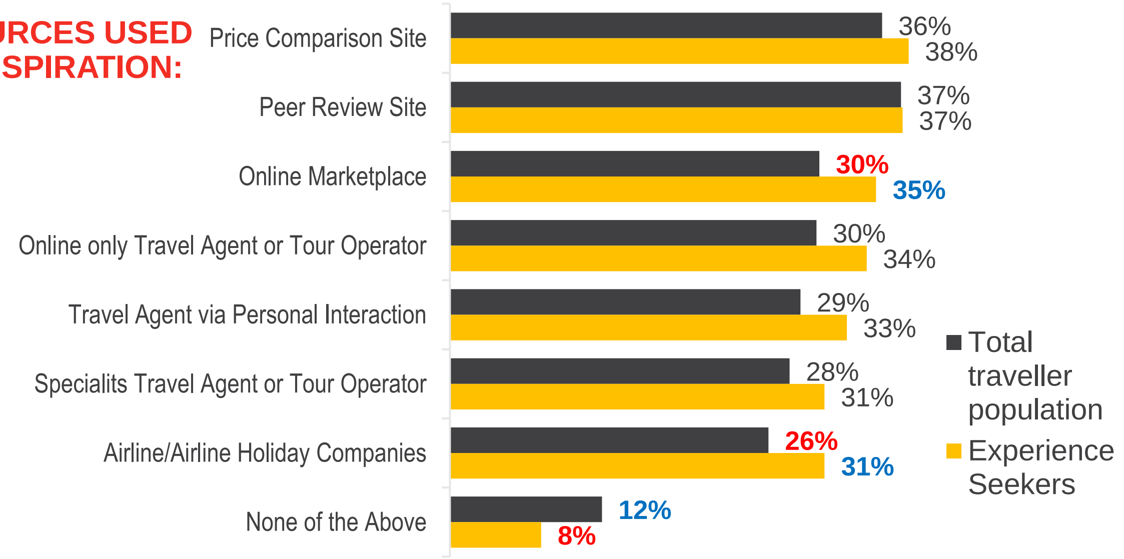
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators.

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

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

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

RESOURCES USED FOR INSPIRATION:



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

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

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

EXAMPLE

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

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

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

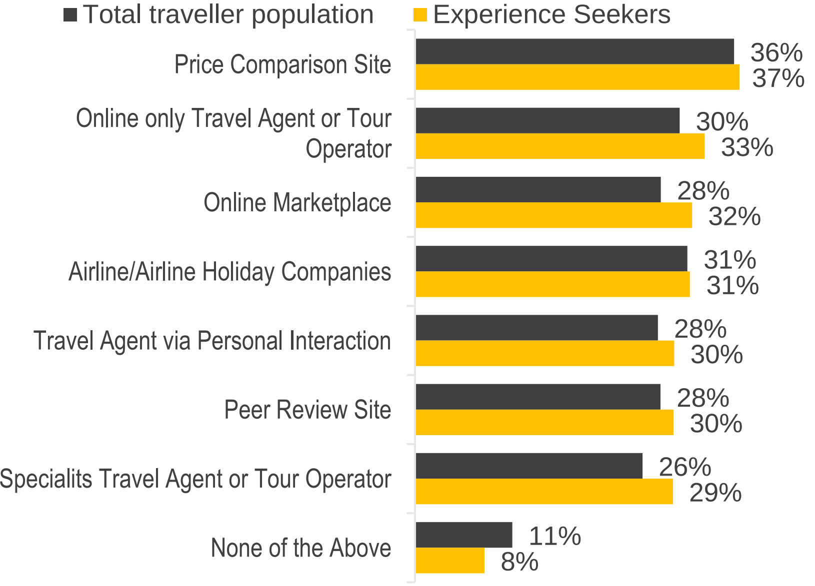
WE asked about independent or package bookings, comparing the target segment with the total tourist population.

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

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

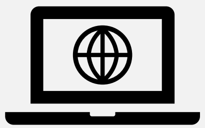
Separately, we indicate what proportion of the segment use in-person travel agents, as the high proportion was found to be quite surprising.

RESOURCES FOR PLANNING:

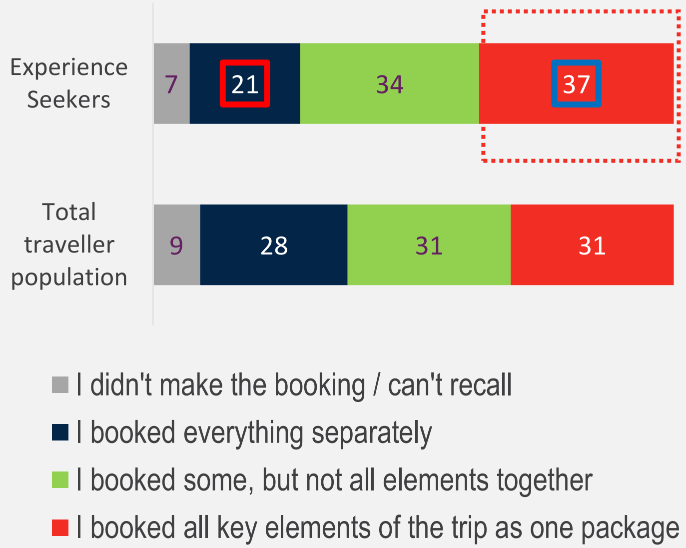


TOOLS:

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



PACKAGE VERSUS SEPARATE BOOKINGS:



PACKAGE BOOKINGS:

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

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