GERMANY BUZZSEEKERS & EXPLORERS

HOW TO READ THE PEN PORTRAITS

Most used information sources

- These are the three most used information sources across 5 stages of the journey (Inspiration, Making the decision, Making the 'big' bookings, Making the itinerary and Daily inspiration and support on the trip).
- The colour coding refers to how the scores compare to the average for the market. If the source is used more (green) or less (red) than the market average this is flagged. Orange means that it is average for this market.

Value

- This is based on reported spend by the respondents in the quant survey. There are a few additional factors also included such as propensity to visit Britain, whether they've already been and size of party.

Living

- The research asked about how many children were in the household, which is what is reported here. This does not necessarily mean that the same proportion travel with children even if they are in the home.

Appealing activities + Point of difference

The top 3 activities are those that were most highly selected and the point of difference are those where this segment over-indexes most compared to the average for the market.

What makes them unique

- The statements listed here are those where the segment over-indexes the most when compared to the average for the market.

Fieldwork for this project was carried out in 2017, and 2000 international travellers were interviewed in each market, but GCC where 500 Saudi and 500 Emirati nationals, all international travellers were interviewed. The results were then weighted by age in each market and the below table shows the sample size of each priority segment in each market.

Market	Segment	Sample Size
Australia	Buzzseekers	660
	Explorers	495
China	Buzzseekers	893
	Culture Buffs	684
France	Buzzseekers	755
	Explorers	423
Germany	Buzzseekers	480
	Explorers	739
India	Buzzseekers, 25+ only	1,068
USA	Buzzseekers	767
	Sightseers	293
GCC	Culture Buffs	281
	Buzzseekers	210

The analysis on each of the following Pen Portraits is based on the corresponding sample sizes above.

EXPLORERS SNAPSHOT

Explorers in Germany are well educated and well travelled , they know what they want and base their decisions on their experiences. Their goal is to deepen their knowledge and learn as much as they can from their holiday. Therefore everything is carefully thought of in advance but there's always space for some last minute additions if it'll enhance their opportunity to comprehend the local culture. They enjoy visiting the famous iconic places however they're also very keen in experiencing nature, that's why GB is highly appealing in its entirety.

INCOME

MODEST, BUT WILLING TO SPEND

Incomes and financial status typically modest, but overseas experiences a key priority

LIVING

14% have kids, but 83% live with other adults only (51% with their partner)

AGE

18-24	25-34	35-44	45-64	65+
2%	7%	11%	43%	36%

GENDER

Female 51%

Male 49%

WHAT MAKES THEM UNIQUE?

Statement	Explorers	All Germans
I know the type of thing I like, and tend to stick with that	100%	66%
I enjoy spending time in the outdoors and in natural landscapes	100%	68%
I prefer holidays at a slower and more relaxed pace	96%	81%
I am comfortable with who I am – I don't care how others see me	94%	76%
I prefer stability	91%	75%
I don't like to take on too much at once	75%	60%

■ Explorers ■ All Germans

MOST USED INFORMATION SOURCES

- Family + Friends 46%
- All-in-one travel websites 37%
- Movies, books, magazines, TV 36%

VISITATION TO GB

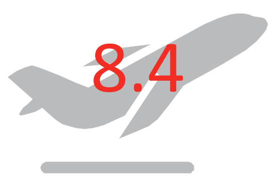
10% visited in past 2yrs

Propensity to visit ranks 6th after Spain, Italy, the Netherlands, France and Sweden

VALUE

*Mid-low**

LEISURE TRIPS AWAY FROM GERMANY IN PAST 2YRS



APPEALING ACTIVITIES FOR INTERNATIONAL HOLIDAY

- **Top 3 activities per segment**
- Trying local food and drink specialties
- Exploring history and heritage
- Visiting famous/ iconic places

- **Point of difference**
- Experiencing rural life and scenery
- Visiting a park/garden

% who have visited

London only	Other major cities	Countryside	Coast
58%	21%	26%	25%

TRAVEL COMPANIONS

With one other person **59%** (+1)

On their own **9%**

With a small family group (fewer than 5) **18%** (FAMILY)

With a small group of friends (fewer than 5) **7%** (FRIENDS)

***Value** is derived from % of segment who have visited GB in the past 2 years, their reported spend, their propensity to visit in future and estimated spend per person*

Traffic light coding = segment over-indexes to market average

LET ME INTRODUCE MYSELF

Halo, This is Ulrike and I come from Hamburg in the north of Germany. I'm 62 and I've been retired for 2 years now, I used to be a teacher. I live with my husband in our family home, although our "kids" are long gone now, we are always spending time with our grandchildren. We've worked hard all of our life and it's time now to enjoy the fruits of our labour by enjoying travel.

MY IDEAL HOLIDAY

- ✓ *Filled with opportunities to deepen my knowledge*
- ✓ *Exploring the historical and iconic sites*
- ✓ *Following the well researched plan*
- ✓ *Trying out the local food and drink offer*
- ✓ *Visiting parks and rural life*

I REALLY DON'T WANT TO…

- × *Go without a plan and potentially miss out on things due to lack of research*
- × *Go out and party all night long – There's more to see than bars and clubs at my age*

BUZZSEEKERS SNAPSHOT

German Buzzseekers are young and curious to explore the world, different cultures and people and do so extensively. Vibrant and full of life are eager to learn and discover. They place more importance in authentic experiences and adventures rather than visiting the classic landmarks. That's why their approach to holiday planning is flexible and spontaneous. GB is considered to be a unique and attractive place full of possibilities and places, things to explore such as music, events, fashion etc…

INCOME

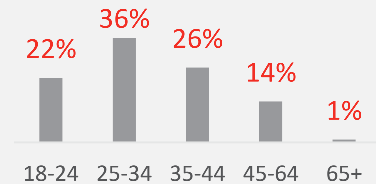
MORE FREEDOM

More affluent than others, but not willing to say how much more! There is money to spend, particularly if well budgeted.

LIVING

21% have kids, but 74% live with other adults only (25% are single and living on their own)

AGE



GENDER

44%

56%

WHAT MAKES THEM UNIQUE?

MOST USED INFORMATION SOURCES

Family + Friends	All-in-one travel websites	Online reviews
41%	34%	33%

VISITATION TO GB

19% visited in past 2yrs

Propensity to visit ranks 5th after Spain, Italy, the Netherlands and France

VALUE

*Mid-high**

TRIPS AWAY FROM GERMANY IN PAST 2YRS

10.1

APPEALING ACTIVITIES FOR INTERNATIONAL HOLIDAY

Top 3 activities per segment

- Trying local food and drink specialties
- Visiting famous/iconic places
- Experiencing city life

Point of difference

- Challenge and/or action filled activities
- Hands on learning activities

% who have visited

London only	Other major cities	Countryside	Coast
56%	47%	32%	29%

TRAVEL COMPANIONS

With one other person **48%** (+1)

With a small group of friends (fewer than 5) **13%** (FRIENDS)

With a small family group (fewer than 5) **19%** (FAMILY)

On their own **10%**

****Value** is derived from % of segment who have visited GB in the past 2 years, their reported spend, their propensity to visit in future and estimated spend per person*

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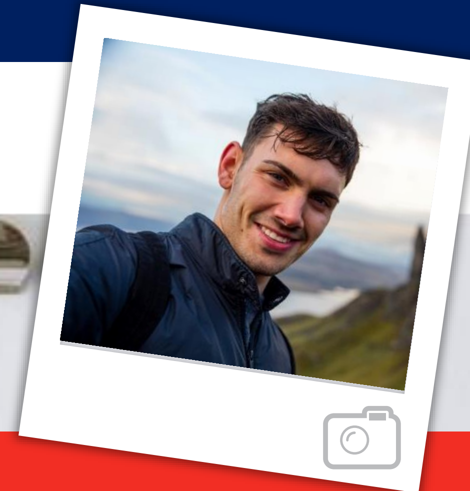
BUZZSEEKERS



LET ME INTRODUCE MYSELF

Kristof here, Graduated from uni recently, now trying to figure out what to do next. Living with my friends and working in a bar at the moment but always travelling around. Budget is scarce but there's plenty of things one can do with a bit of fantasy!

MY IDEAL HOLIDAY

- ✓ *Spontaneous and full of adventure*
- ✓ *A great learning opportunity both personally and culturally*
- ✓ *Chatting with locals and finding out the cool spots to hang out*
- ✓ *Shopping and events*

POSTCARD

This holiday is so geil, me and the rest of the crew landed in London a few days ago and have soo many fun stories to tell. We've visited a couple of museums and seen the Big Ben but have mainly been hanging out with people in the hostel and some old friends. Do you remember British George? It's the guy that did his Erasmus at Köln university and studied with us. Well, we got back in touch and he took us to an incredible warehouse party, the music scene is really buzzing here! We might try to get tickets for a football match but off it's so expensive at this late stage….

FROM:

PLACE STAMP HERE

I REALLY DON'T WANT TO…

- × *Waste time and money in doing touristy stuff – The best way to get to know the culture is by talking to the people*
- × *Following a plan and losing the opportunity to take a chance and follow the flow*