

Australian Buzzseekers

Foresight – issue 167

VisitBritain Research

Contents

Introduction and study details

1. Key findings
2. How can Britain generate excitement about visiting among Australian Buzzseekers?
3. What are the opportunities to communicate during the holiday planning and booking journey?
4. What does their last/next long-haul holiday look like?
5. Are there other challenges and opportunities to create excitement about visiting Britain?

Appendix: Media consumption and sample characteristics

Background and research question

Research background:

- Our recent segmentation research has identified Buzzseekers as a key leisure travellers' group that VisitBritain wants to target in Australia, in order to increase holiday visits to Britain.
- Buzzseekers in Australia are experienced travellers looking for rewarding holidays whilst exploring the world*.
- This research investigates in more details Australian Buzzseekers' attitudes towards and image of Britain, and their behaviours when planning and booking mid- and long- haul holidays (including to Britain).

The report is organised around answering these questions:

- How can Britain generate excitement about visiting among Australian Buzzseekers?
- What are the opportunities to communicate during the holiday planning and booking journey?
- What does the holiday look like?
- Are there other challenges and opportunities to create excitement about visiting Britain?

Research details

Methodology: Quantitative online survey sampled from online access panels.

Target: Australian Buzzseekers aged 18+, living in Sydney or Melbourne, who have been on a mid- or long-haul international holiday in the previous five years or intend to go in the following 12 months.

Sample: 800 respondents.

Sample structure: Respondents were excluded from the research if they only travelled/intended to travel to short-haul destinations (Oceania or South East Asia). Respondents were recruited to be representative of Australian Buzzseekers by age and gender. The final data are weighted by age and gender to correct for minor imbalances in the achieved sample. Weighting efficiency is high at 93%.

Respondents who had been on a mid- or long-haul holiday in the previous 5 years were asked about their most recent holiday. Those who were planning on going in the next 12 months were asked about their plans for their next holiday. Results are shown together as very few Buzzseekers had not been on an international holiday in the previous 5 years.

Fieldwork timings: 23 October – 12 November 2018.



1. Key findings

Key findings

How can Britain generate excitement about visiting among Australian Buzzseekers?

Britain is already a popular and familiar destination for Buzzseekers, which can mean:

- generally positive views of Britain as a holiday destination, especially its cultural heritage, historic buildings and monuments, and contemporary culture.
- but also a lack of excitement about visiting

There are several opportunities to generate more excitement:



Make use of word of mouth from those who have visited already, whose experiences are generally positive; use platforms used by Buzzseekers during their planning and booking journey (e.g. online review websites like TripAdvisor, travel websites and all-in-one travel websites, video sharing services)



Don't shy away from the fact that Britain is far away, but use the flight as an opportunity to build up excitement about the holiday and as an opportunity for Buzzseekers to relax ahead of a big adventure.



Continue to capitalise on elements that Buzzseekers want from a holiday that they think Britain delivers: cultural attractions, good local food and drink, the ease of getting around, countryside and nature. Make sports more relevant in a holiday context.



Improve perceptions of weather, safety, welcoming people, value for money, variety/new things, areas that are important when deciding where to go on holiday, but where Britain performs less well than general expectations.

Key findings

What are the opportunities to communicate during the holiday planning and booking journey?

There is a lot of overlap between stages of planning and booking holidays and the process starts

Communications should:



Hook them in early by highlighting activities/things to do when they are researching other elements (e.g. flights).



Frame Britain as a “must visit” before the flight/package is booked.



Upsell Britain as a destination to add to the itinerary or to extend their stay by highlighting exciting events and activities. Activities are particularly relevant at an early stage for those booking package holidays: while activities tend to be booked after leaving Australia, looking up activities can start much earlier, thus potentially influencing the final itinerary.

Channels and information delivered should be customised according to the purchase journey stage:



Word of mouth and **online sources** are used throughout. Facebook, YouTube and Instagram could be potential communications partners. **Travel websites** are used when making the big purchases.



The **VisitBritain website** is key for inspiration and making the itinerary. Continue to invest in content. **Travel blogs/vlogs** can be used to hook those considering visiting Britain.



Continue to attract Buzzseekers to Britain through traditional sources such as **bricks and mortar travel agents, travel books and magazines**.



Communicate exciting things to do and visit throughout. As prices and good deals are very important to Buzzseekers, highlight **value for money**.

Key findings

What does their last/next holiday look like?

Holidays can be very diverse, either with the family, or on their own. They happen **all year round**, slightly less in September to November. Hotels are the most popular accommodation, and even those visiting friends and family don't spend all their time with them.

Transport tends to be booked before leaving Australia, and activities are less likely to be booked at all. But when they are, they are usually booked independently, and not part of a package.

Communications should:

 Show Britain as a fun and exciting place to visit regardless of who they're travelling with.

 Show there are activities for all seasons, and communicate them all year round, to coincide with when holiday planning starts.

 Also target those visiting friends and family and influence their itinerary within Britain.

There is an opportunity to:

 Continuously grab their attention with exciting activities throughout the booking process.

 Convince them to add Britain as a destination so they don't miss an exciting event.

 Convince them to pre-book more activities and events before leaving Australia.

Key findings

Are there other challenges and opportunities to create excitement about visiting Britain?

Buzzseekers are likely to be very familiar with Britain, either through having visited in the past, having friends and family in/from Britain or having lived here themselves.

This can lead to **a lack of excitement about visiting Britain**.

But this sense of familiarity can be challenged:



While friends and family can help them get around in Britain, don't assume they will also make Buzzseekers excited about visiting interesting places. Communications should target Buzzseekers directly and help generate excitement before they leave Australia.



Showcase interesting places that they might have missed in the past, especially as those who lived in Britain only did so for a few months.



Highlight how easy it is to get to new and unexplored places.



2. How can Britain generate excitement about visiting among Australian Buzzseekers?

How can Britain generate excitement about visiting among Australian Buzzseekers?

- Britain is already a popular destination for Australian Buzzseekers.



- Potentially high levels of familiarity

Generally positive perceptions, especially :

- cultural heritage
- historic buildings and monuments
- contemporary culture
- More positive perceptions among those who have been on holiday in the last 5 years.

Opportunities:

- Word of mouth from previous visitors can help generate buzz on platforms used during the holiday planning and booking journey (e.g. online review websites like TripAdvisor, travel websites and all-in-one travel websites, video sharing services).
- Sports don't feature in Buzzseekers' holiday plans, but we know from this and other research that Britain is perceived as having great sports teams and events. Make sports a bigger element of a holiday.
- When specifically choosing to visit Britain, a few aspects make it more distinctive: **the ease of getting around**, the possibility of **visiting friends and family** and having **a mix of old and new**:
 - Having a mix of old and new could be communicated more to potential visitors

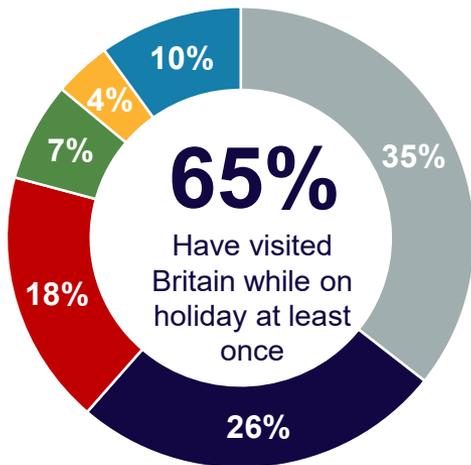
How can Britain generate excitement about visiting among Australian Buzzseekers?

... but also a lack of excitement about visiting Britain

- In a holiday, Buzzseekers look for:
 - cultural attractions
 - good food and drink
 - getting a good deal
 - good weather
 - Britain underperforms on some elements that are seen as important when going on holiday and overperforms on some that are not as important for Buzzseekers.
- **Continue to capitalise** on aspects that are important and Britain is seen as offering: cultural attractions, good local food and drink, the ease of getting around, beautiful countryside.
 - **Improve perceptions/availability** of aspects that are important in a holiday, but Britain is not seen as offering enough: value, weather, safety, welcoming people. Showcase places where Buzzseekers haven't been before and cultures that are not very similar to Australia.
 - **Increase the relevance for holidays of aspects not currently important, but that Britain is seen as offering**: vibrant cities, having a mix of old and new, parks and gardens, being able to interact with locals in English, contemporary culture, gourmet food and drink, sports, children's activities.
- The **main downsides** about visiting, amongst all Buzzseekers and those who have visited, are: **weather**, **costs** and Britain being **far away**:
 - Redefine the flight as an opportunity to relax, do research, build up excitement about Britain.
 - Half of those who have not visited in the last 5 years state reasons that could be challenged with communications.
 - Create excitement by planning an interesting itinerary, showcasing value destinations, especially big cities, mild weather and cultural quirks that can only be found in Britain.

Proportion who have visited Britain on holiday

- Almost two thirds of Buzzseekers have been to Britain while on holiday at least once. This suggests the potential for a high level of familiarity with Britain, as found in VisitBritain’s Decisions and Influences research*.
- A high level of familiarity can be a barrier for creating excitement about Britain.



■ None ■ 1 ■ 2 ■ 3 ■ 4 ■ 5+



Highest among...

- 45+ age group (73%)
- Higher earners (71%)

Lowest among...

- 18-24 age group (58%)
- Those not working (56%)
- Low income (58%)
- Females (59%)

Positive perceptions of Britain

- Britain is well perceived, especially for its culture, historic buildings/monuments and countryside.
- Perceptions among those who have visited Britain in the previous five years are more positive, with the exception of sports.



From other research we know great sports is usually an advantage for Britain, but it doesn't seem to translate into a hook for going on holiday.

While those who have visited are more positive about Britain, previous research shows that Buzzseekers are keen to share their experiences, but not on social media. There is potential to use the stories they have to share to influence perceptions of others who have not visited through channels used as inspiration or for making decisions: e.g. reviews on Trip advisor, travel websites, video sharing websites.

▼ ▲ Statistically higher/lower than total, tested at 95% CL

Negative perceptions of Britain

- For Buzzseekers, the main downsides of visiting Britain are the weather and costs.
- Amongst those who have visited in the last five years, the length of the journey to get here is also a key downside.



Lack of knowledge is not a strong barrier to visiting Britain.

Barriers related to flight duration could be challenged through partnerships with airlines (e.g. communications on in-flight entertainment).
 Make the flight there seem like the perfect opportunity to relax ahead of a big adventure.
 In-flight magazines can further build up excitement before the holiday.

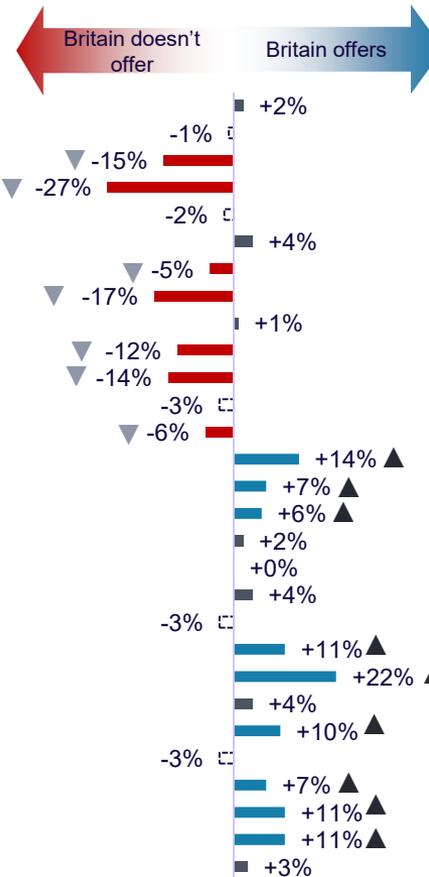
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What Buzzseekers look for in a holiday

- When going on holiday, Buzzseekers mostly look for cultural attractions, good food and drinks, a good deal, and good weather. Britain overperforms on attributes which are less commonly looked for, but underperforms on some that are more important.

Looking for in a holiday in general

49%	Cultural attractions
47%	Good local food and drink
46%	A good deal e.g. on flights, total holiday package
45%	Good weather
43%	The ease of getting around
43%	Countryside and natural beauty
43%	Somewhere that is safe/secure
43%	Affordable cost of staying in the destination
41%	A wide variety of places to visit around the country
41%	Somewhere I'd never been before
40%	A culture that is different from our own
39%	To have a wide range of holiday activities
39%	Open/welcoming people
38%	A vibrant capital city/London
37%	To have a mix of old and new
33%	Vibrant cities outside the capital
33%	The ease of getting to the country
32%	Outdoor leisure pursuits
31%	Varied and high quality accommodation
30%	Possibility of visiting friends or relatives
30%	Parks and gardens to visit
28%	Somewhere where they speak English
27%	Festivals
26%	Contemporary culture
26%	Theme parks, zoos
25%	Gourmet/world class food and drink
18%	Exciting sports events
15%	Somewhere easy to visit with children
14%	Hands-on learning activities



Continue communicating cultural attractions, good food and drink and the ease of getting around, which are important attributes that Buzzseekers look for in a holiday and think Britain offers.

Improve perceptions/availability: value, weather, safety, welcoming people. Showcase places they haven't been to before, cultures that are not similar to Australia.

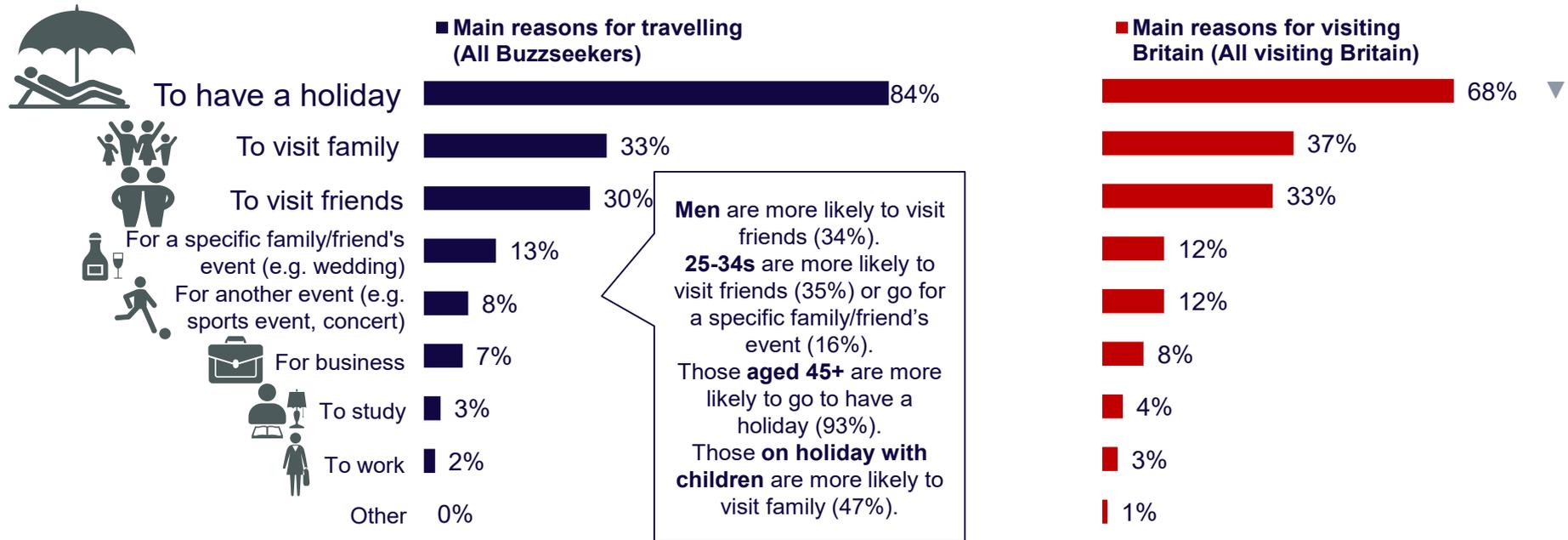
Increase relevance for holidays, show how these elements can mean a good, fun holiday: vibrant cities, a mix of old and new, parks and gardens, being able to interact with locals in English, contemporary culture, gourmet food and drinks, sports, children's activities.

Shown: differences between how many Buzzseekers say they look for each element when deciding where to go on holiday and how many say Britain offers that element

▼ ▲ Statistically higher/lower than total, tested at 95% CL

Main reasons for travelling

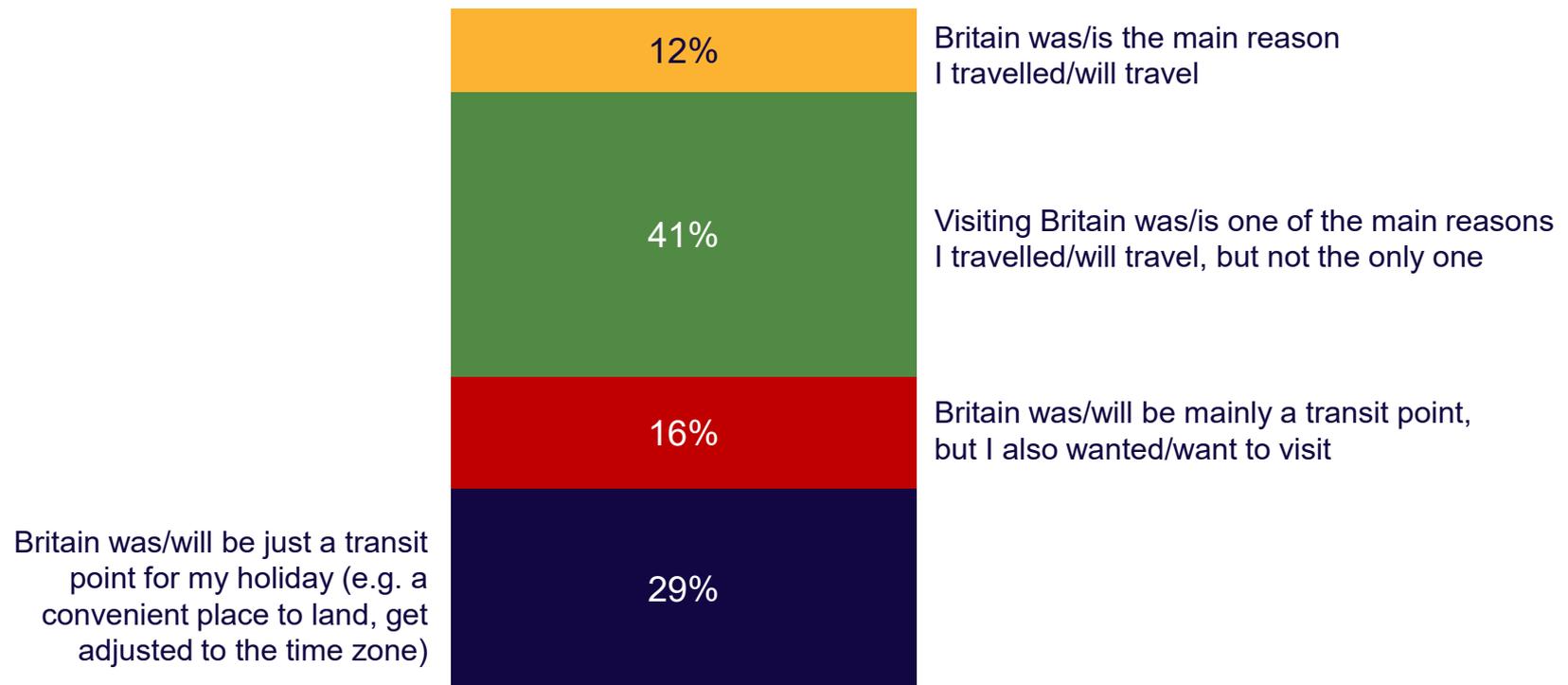
- For most Buzzseekers, having a holiday was the main reason for travelling on this occasion, with one in three saying they travelled to visit family or friends.
- Having a holiday is still the most important reason for visiting Britain, but the trip is more likely to be linked with a range of other reasons. This suggests Britain is not necessarily an exciting destination in itself.



▼ ▲ Statistically higher/lower than total, tested at 95% CL

Britain's role in the travel itinerary

- Amongst Buzzseekers visiting Britain and at least one other country, visiting Britain is an important reason to travel, but few say it is the only reason, suggesting a lack of excitement about visiting Britain.
- A sizeable minority (29%) say Britain is only a transit point, more than say it was the main reason to travel (12%).



Main reasons for visiting Britain

- Cultural attractions are the main reason Buzzseekers choose to visit a country, including Britain. Britain also stands out as easy to get around, offering the possibility of visiting friends/relatives, safety/security and having a mix of old and new.

Top 10 reasons for visiting other countries

Cultural attractions e.g. historic buildings and famous sights	43%
Good local food and drink (bars, pubs, restaurants)	42%
A culture that is different from our own	41%
Good weather	39%
A wide variety of places to visit around the country	38%
Countryside and natural beauty	38%
A vibrant capital city	38%
To have a wide range of holiday activities	37%
Affordable cost of staying in the destination	36%
Somewhere I'd never been before/go somewhere new	35%

Top 10 reasons for visiting Britain

Cultural attractions e.g. historic buildings and famous sights	40%
A vibrant capital city/London	37%
The ease of getting around	34%
Possibility of visiting friends or relatives	33%
Somewhere that is safe/secure	32%
Good local food and drink (bars, pubs, restaurants)	31%
Countryside and natural beauty	31%
To have a mix of old and new	31%
A wide variety of places to visit around the country	29%
To have a wide range of holiday activities	29%

Top reasons for Buzzseekers are similar to all Australians (based on Decisions and Influences research), but visiting friends and family seems to be a lower priority for Buzzseekers than it is for all Australians.

Britain is already perceived as offering a mix of old and new by almost a third of visitors to Britain. This aspect could be communicated more to potential visitors.

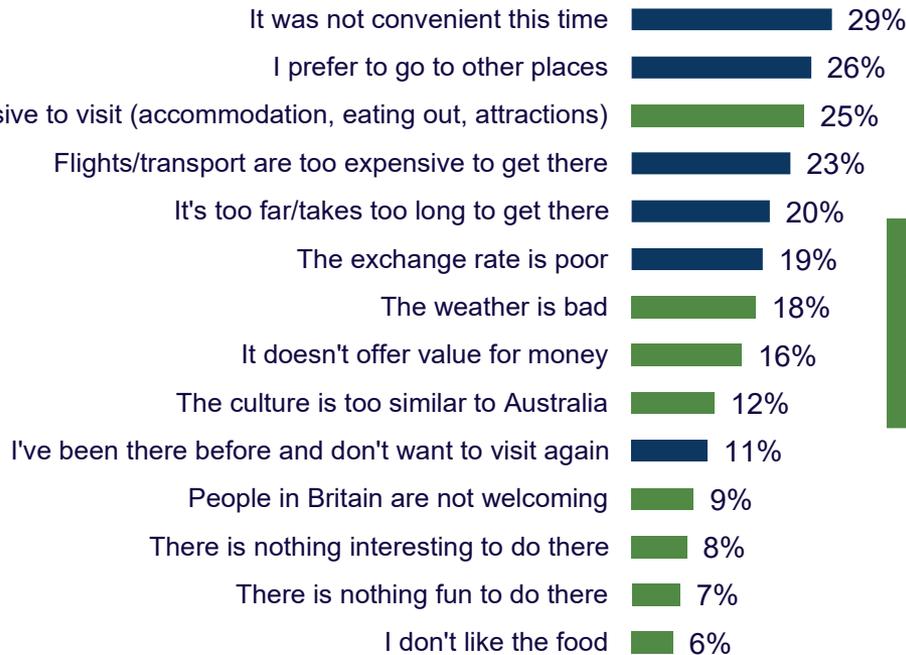
For those on holiday with children, it is more important when choosing a country to be easy to visit with children (34%) and having theme parks, zoos (30%).

B04. Now thinking about your holiday in general, which of the following were/would be the most important reasons why you chose to visit/for you to visit ...? Base = All except those only visiting Britain (770)

B05. Which of these were the most important reasons why you chose to visit Britain on this occasion? Base = All visiting Britain (125)

Reasons for not visiting Britain

- The top reasons for not visiting Britain on their last/next international holiday relate to convenience, cost and generally preferring to go elsewhere. Yet a third state as reasons impressions that could potentially be changed through targeted communications.



50% state impressions that could potentially be changed through messaging.

Potential to communicate:

- value destinations outside London, especially large cities
- mild weather in South of England
- cultural quirks/traditions that can only be found in Britain



3. What are the opportunities to communicate during the holiday planning and booking journey?

What are the opportunities to communicate during the holiday planning and booking journey?

- There is **considerable overlap between stages of planning and booking**
 - Looking up/booking activities often happens before booking accommodation
 - Most decisions are made more than 3 months before travelling
- **First moment in the purchase journey: booking the holiday package / the flight**; some start by booking activities.

Communications opportunities

- Activities/things to do are often booked alongside other elements (e.g. flights) so they could be highlighted throughout (e.g. 'hot tickets', 'must do')
- The ideal is to highlight Britain as a 'must visit' before the flight/package is booked
- After holiday packages/flights have been booked, there is opportunity to up sell: adding Britain to the itinerary, extending their stay in Britain, visiting other places in Britain, adding other activities
- 'Mix & match' and 'package plus' travellers seem to be easiest to 'hook in' at an early stage (with pre-booked activities, etc.)

What are the opportunities to communicate during the holiday planning and booking journey?

- **Friends and family and online sources:** important sources of information throughout the planning process.
- **Travel websites** used throughout, but more prominent when making the 'big' bookings.
 - Customise channels and types of information according to purchase journey stage (e.g. travel websites when making big purchases to convince them to add Britain to itinerary)
 - TripAdvisor and positive word of mouth are key at all stages (capitalise on the positive perceptions of other Buzzseekers who have already been, as they seem to like it!)

Buzzseekers coming to Britain:

- use **tourism board sites** during the inspiration stage and for making the itinerary.
- consult **traditional sources** (books, magazines, travel books) for inspiration.
- are more likely to use travel blogs/vlogs for inspiration, but less likely when making decisions.
 - The VisitBritain site is key to Buzzseekers, continue to invest in content.
 - Continue to attract Buzzseekers to Britain through traditional sources such as bricks and mortar travel agents, travel books and magazines, but also use travel blogs/vlogs to inspire them.

What to communicate:

- What to do/where to go throughout their booking process.
- Value, especially when making the decision and 'big' bookings.
- Information on arts events for daily inspiration while on holiday; Instagram and Pinterest used more by those coming to Britain.

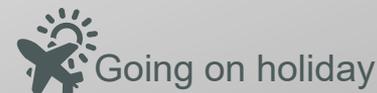
Timings of purchase journey

- There is considerable overlap between stages of planning and booking. Deciding the final itinerary can happen at the same time as booking elements (the holiday/flights/accommodation) and at the same time as researching activities.
- Most decisions are made more than 3 months before travelling.
- Patterns are very similar for visitors to Britain.

Longer holidays tend to be planned more in advance than shorter holidays.

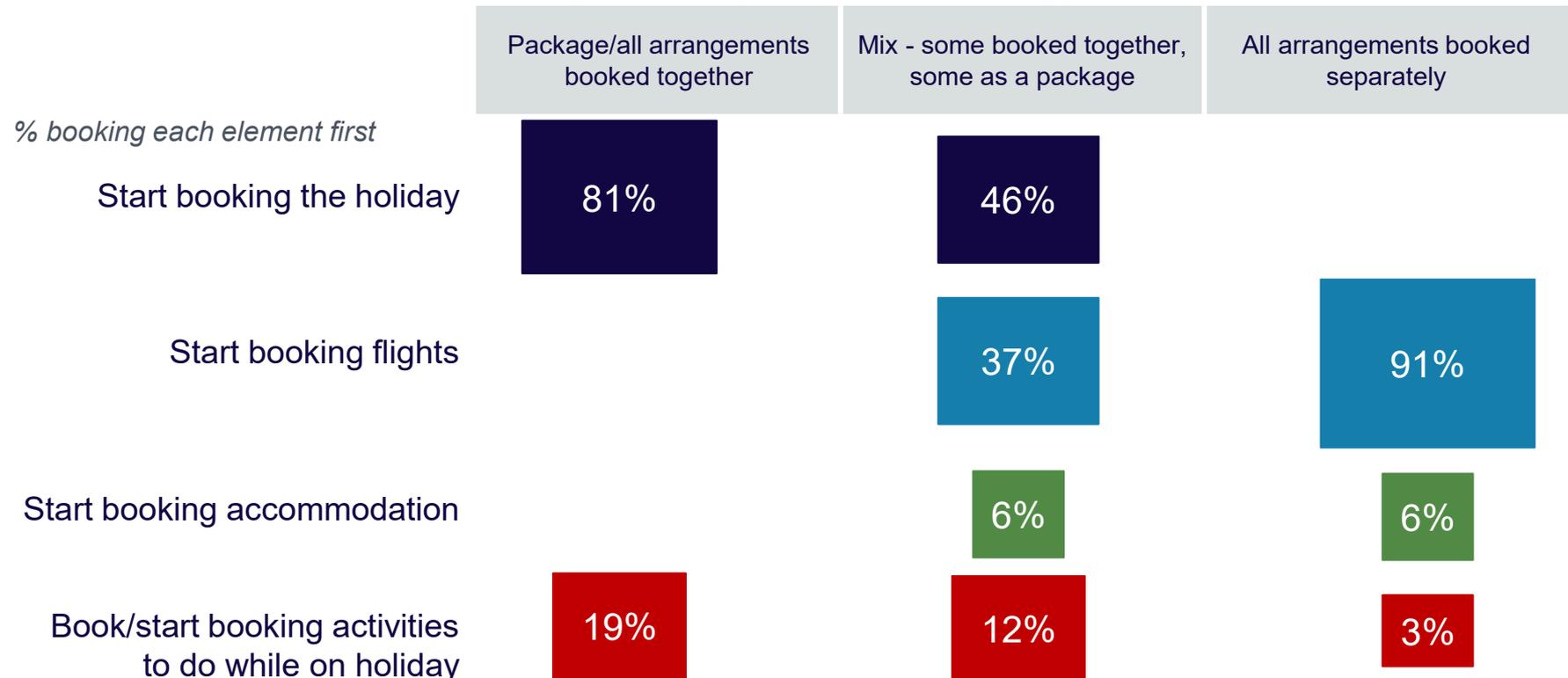
Packages or flights are booked first.

	N=	Start thinking about going on holiday/ look up inspirations	Start researching destinations	Start shortlisting destination options	Decide on destinations	Decide on the final itinerary	Start booking the holiday	Start booking flights	Start booking accommodation	Start looking up activities to do while on holiday	Book/start booking activities to do while on holiday
More than 12 months before	800	24%	17%	12%	11%	8%	8%	6%	5%	8%	6%
12 to 6 months before	800	34%	33%	29%	29%	21%	27%	27%	21%	20%	20%
3 to 6 months before	800	26%	31%	36%	34%	34%	36%	37%	38%	32%	28%
1-2 months before	800	10%	12%	16%	18%	22%	19%	20%	22%	23%	23%
Less than a month before	800	4%	5%	5%	7%	12%	8%	8%	11%	14%	18%



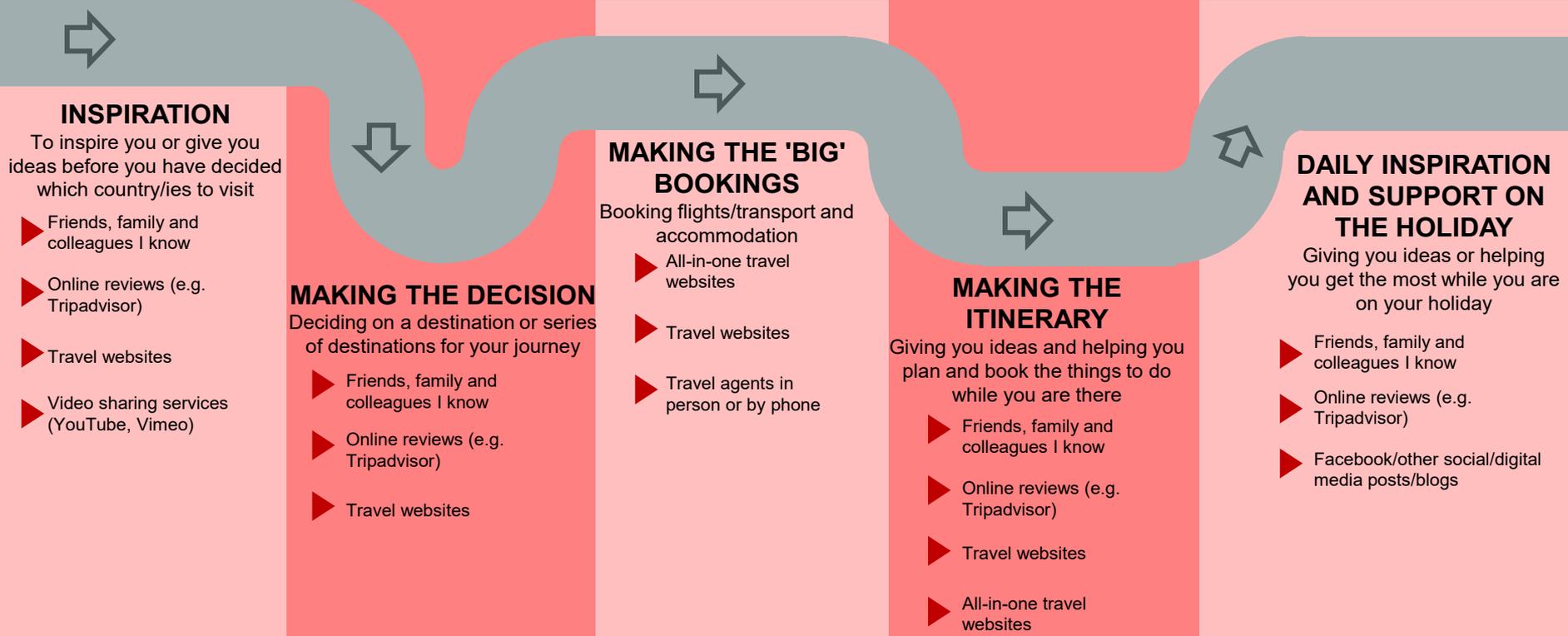
Succession of bookings

- Booking the holiday package or flights tend to come first. Booking accommodation seldom comes first in the process
- Almost one in five booking package holidays start with booking activities (though fewer of those booking all arrangements separately)

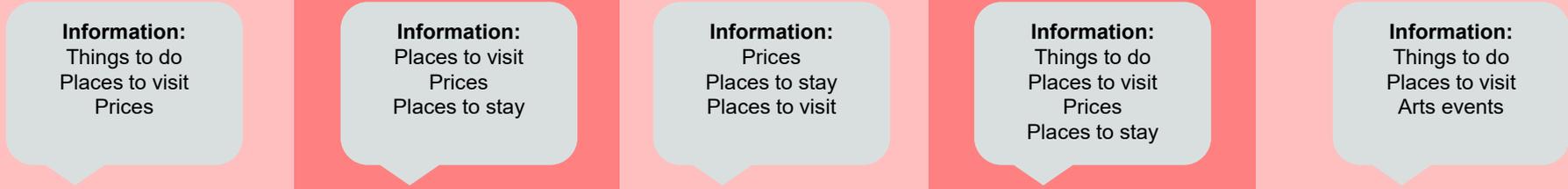


Opportunities to communicate

Top 3-4 most used sources of information:



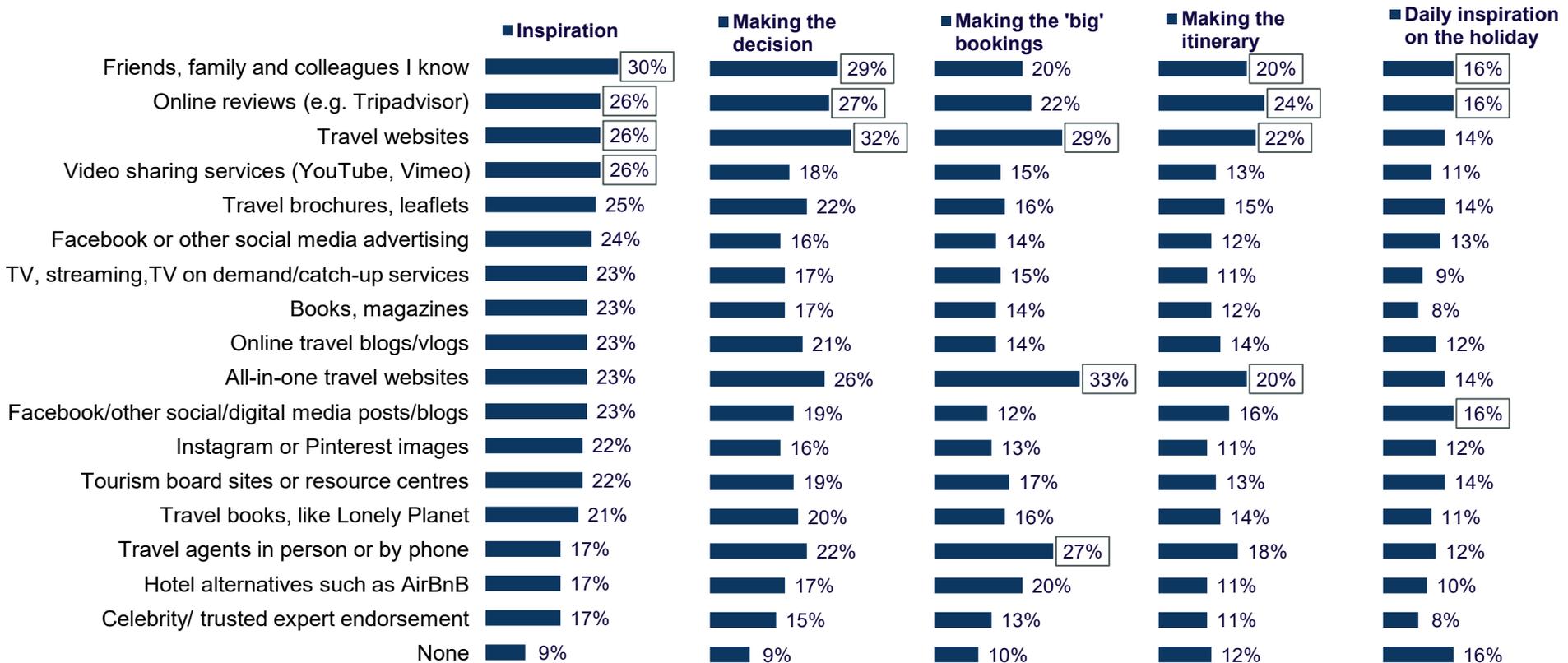
Top 3 most looked up types of information:



B12. Which of these did you use for each of these stages of planning and booking your holiday? B13. Did you look up any of these types of information at each of these stages of planning and booking your holiday? Base: All respondents (800)

Sources of information

- Buzzseekers use a large mix of information sources. Friends and family and online sources are key for inspiration, while travel websites and travel agents are consulted more when deciding and booking. Those visiting Britain are more likely to use travel blogs/vlogs for inspiration, but less likely when making the decision.





4. What does their last/next long-haul holiday look like?

What does the holiday look like?

- **Half of Buzzseekers travel with their partner**, a quarter travel alone at least for part of the holiday and a quarter travel with children.

Communications should show that Britain can be a desirable holiday destination with the family, with friends or on their own.

- **Holidays take place all year round**, somewhat less in September-November.

Communications should also be all year round and showcase activities for each season.

- **Hotels/motels/resorts** are the most common accommodation types.
- Visiting friends was an important factor for visiting Britain, but no more so than other countries.

There is the opportunity to influence Buzzseekers' itineraries and activities even if they're visiting friends and family

- Activities while in Britain and elsewhere are **visiting cultural attractions, large cities, parks and gardens**.
- These tend to be **booked independently**, and not as part of a package.

As Buzzseekers look up activities up to a year before going on holiday (sometimes before booking accommodation), continuously grab their attention with interesting events and activities. Those not visiting Britain could be convinced to add it as an additional destination in order to go to an exciting event.

- While transport is usually booked before leaving Australia, **tickets for events and activities are less likely to be purchased at all**.

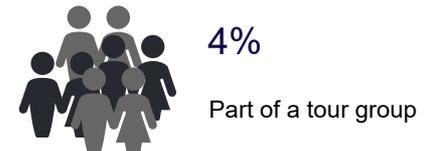
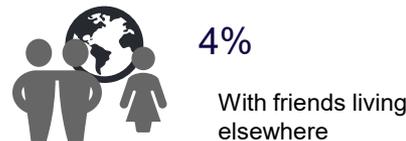
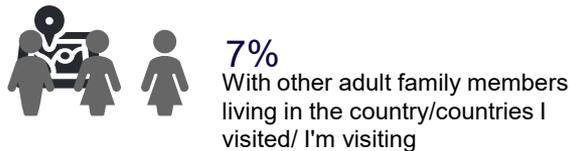
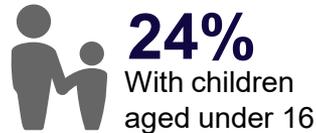
Hook in Buzzseekers by getting them to pre-book more activities, and book them before leaving Australia.

Travel companions

- Half of Buzzseekers travel with their spouse/partner. One in three travel on their own for at least part of the holiday and a quarter travel with children. The pattern is similar for Buzzseekers visiting Britain.



Companions can influence what a holiday looks like (e.g. travelling with children as seen in the previous section impacts on what Buzzseekers prioritise). Communications should show Britain as a place that Buzzseekers can visit with their family or on their own.



Travel companions (2)

- Most Buzzseekers travelled with the same people for the entire time. Those visiting Britain are more likely to be joined by someone for part of the holiday.
- One in ten were joined for parts of the holiday by others living in Australia.

80% travel with companions at some point of their trip

How long did they join for?

- The same person/persons during the entire holiday
- One or more persons joined/will join for only part of the holiday



▼ ▲ Statistically higher/lower than total, tested at 95% CL

Where do those people joining for parts of the holiday live?

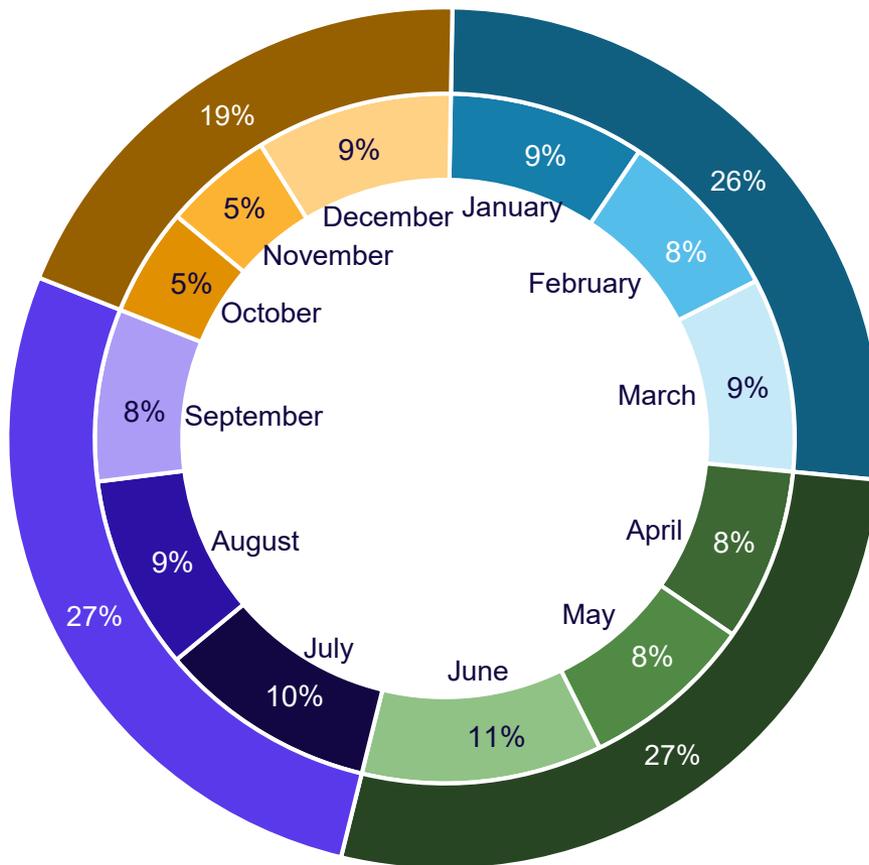
Living in Australia	11%
Living in or near a place you were/are visiting	6%
Living elsewhere, not close to where you were/are visiting	3%

B015. Did/Will you travel with the same person/persons during the entire holiday, or did/will one or more persons join you for only part of your holiday?
Base = All respondents (800), all who travelled to Britain (122)

B016. And can we check, the person or persons joining for only part of the holiday are ...?
Base = All respondents (800)

Season

- Holidays are evenly split across most of the year, but fewer are in October-December. The same pattern is found for holidays to Britain.

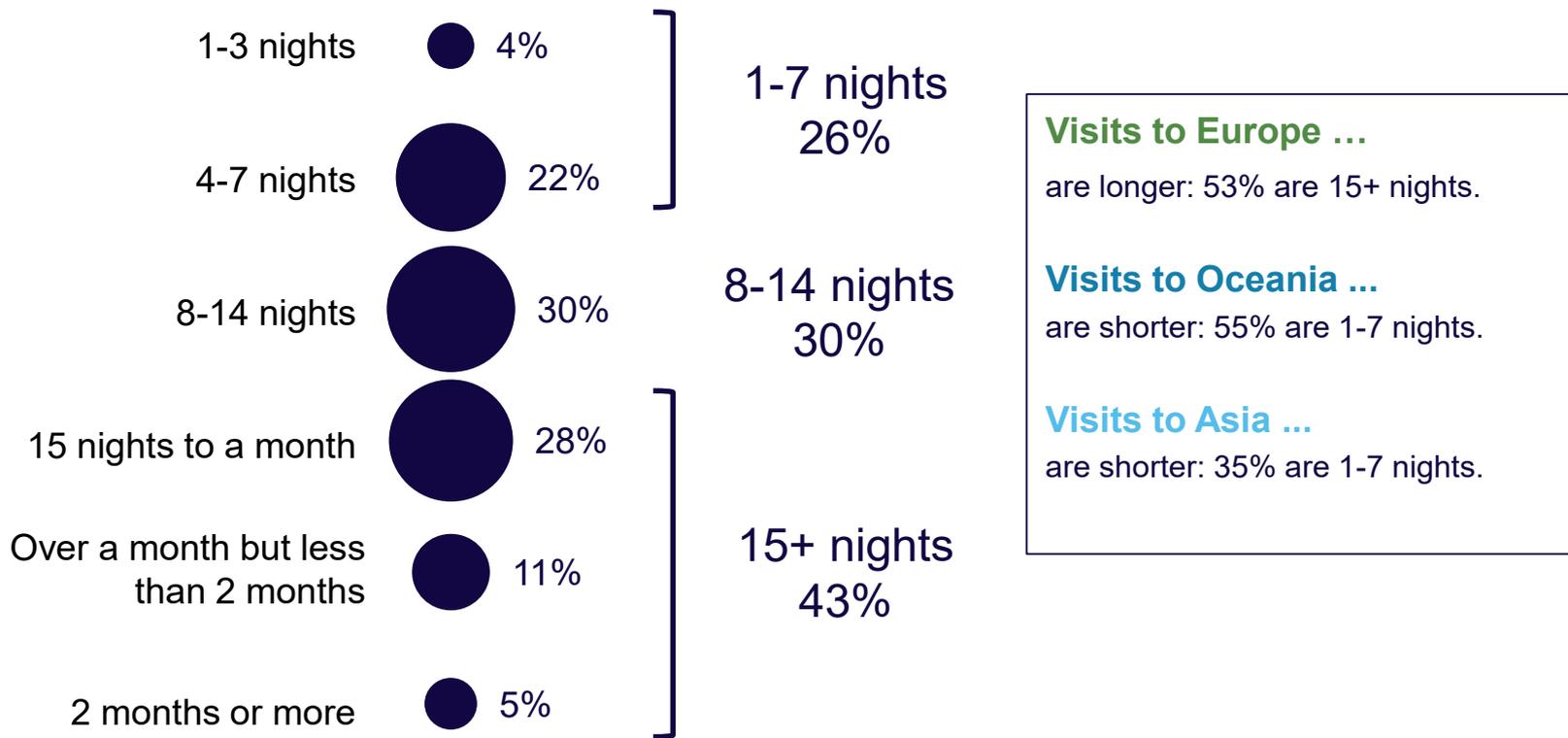


Buzzseekers start thinking about going on holiday and researching 6 to 12 months before going on holiday (some even earlier), suggesting that a holiday that is happening during Australian winter can be influenced starting with July the previous year.

The final destinations are decided 3 to 12 months before, suggesting the need for year round communications.

Length of entire holiday

- Holiday length ranges substantially, but two in five are 15 nights or longer.
- Holidays to Europe tend to be longer, while those to Oceania and Asia are shorter.



Length of stay in Britain

- Buzzseekers visiting Europe tend to stay longer than average. On average, about half of days in Europe are spent in Britain.

How long was your holiday/will your holiday be in total?

All Buzzseekers



Average number of nights

20 nights



1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Visiting Europe



24 nights



1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

How long in total did/will you spend in Britain?

Visiting Britain



12 nights



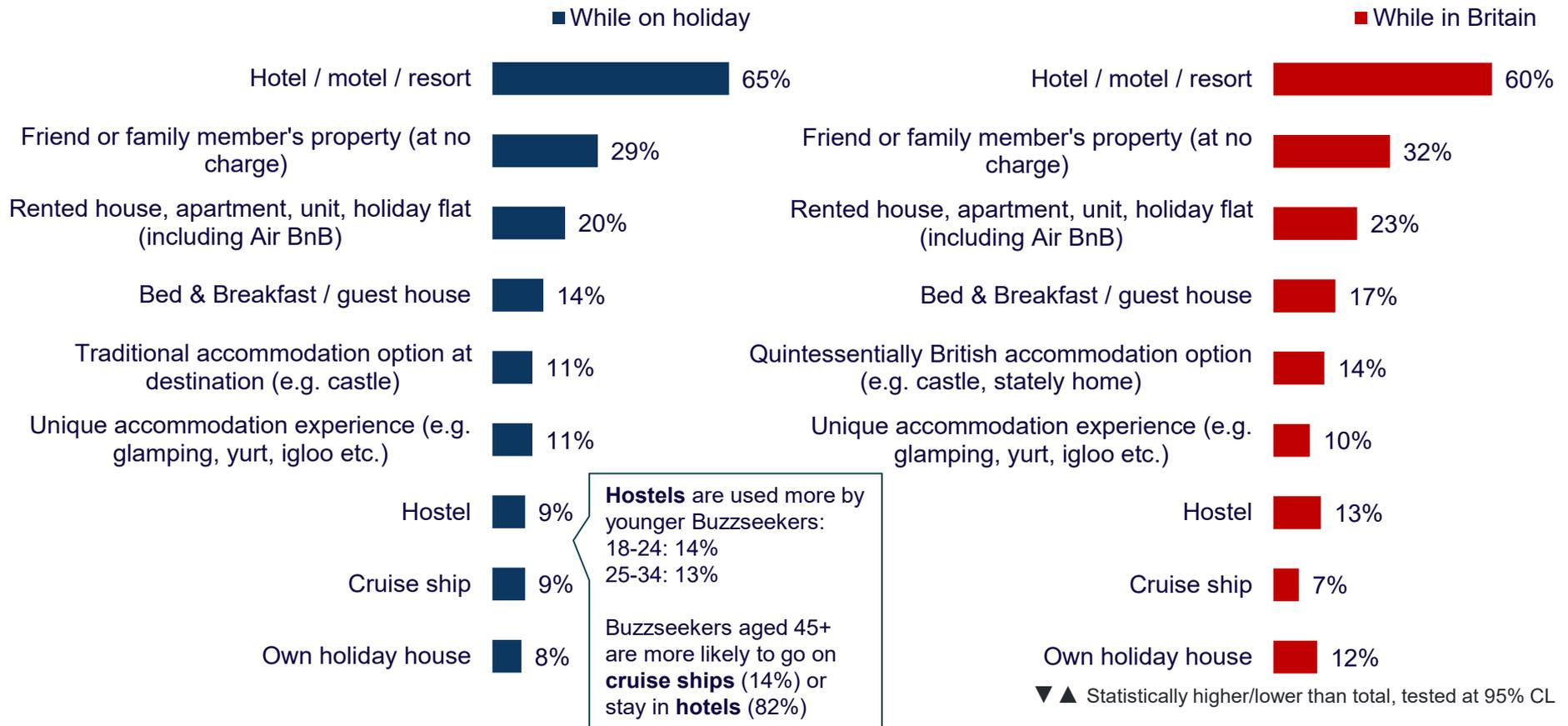
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

B17. How long was your holiday/will your holiday be in total? Please count the number of nights spent abroad. Base = All visiting other countries not only Britain (770)/All visiting Europe except only Britain (274)

B18. How long in total did/will you spend in Britain (England, Wales, Scotland)? Base = All visiting Britain (122)

Accommodation

- Most Buzzseekers stay in hotels/motels/resorts while on holiday, and one in three stay with friends or family. The same pattern applies for those visiting Britain.

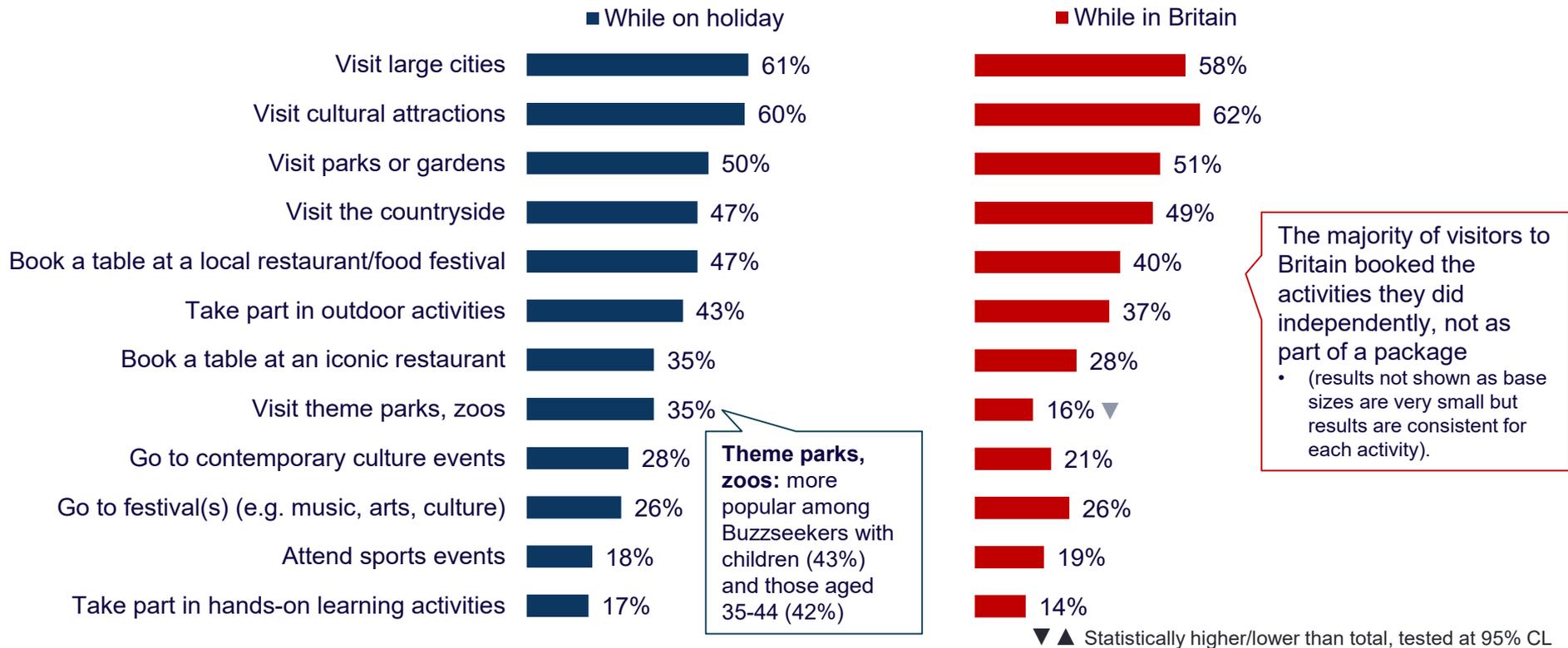


B19. Where did you stay/do you expect to stay while on holiday in: ...? Base = All visiting other countries not only Britain (770)

B20. While you visited Britain, where did you stay?/Where do you expect to stay while you will be visiting Britain? Base = All visiting Britain (122)

Activities

- The most common activities while on holiday, in Britain or elsewhere, are visiting large cities, visiting cultural attractions and visiting parks and gardens. Visitors coming to Britain are less likely to visit theme parks and zoos than those elsewhere.



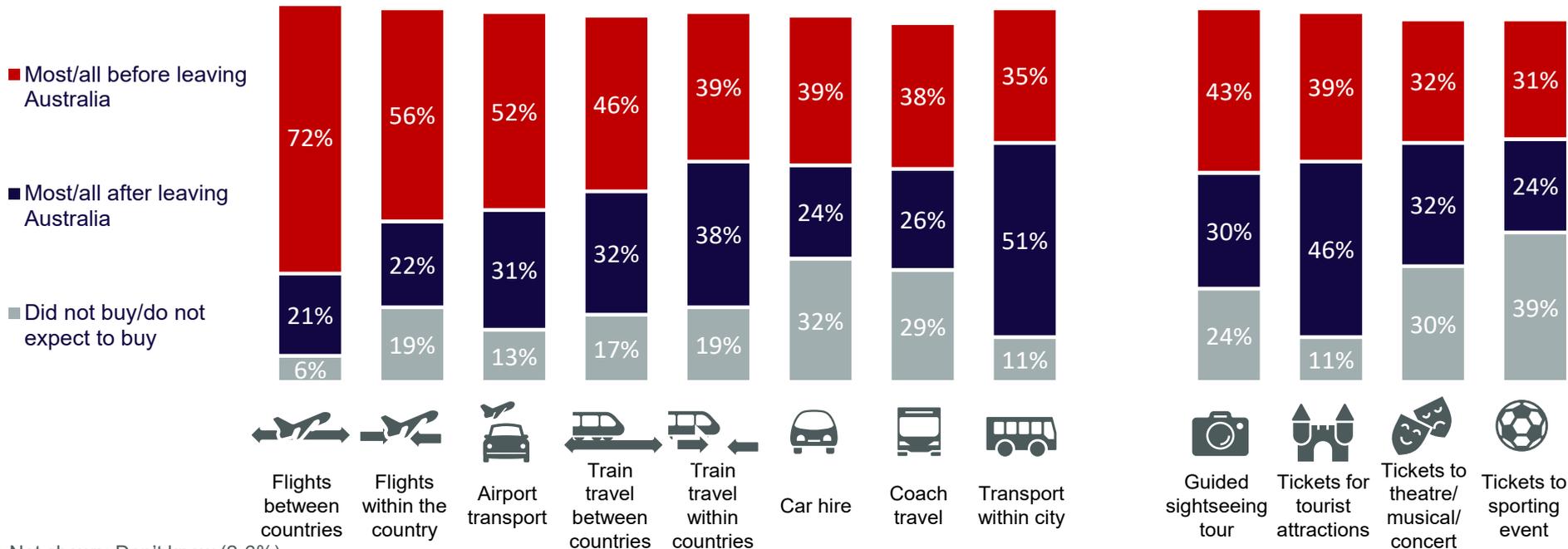
B21. Did you do/Are you planning on doing any of the things listed below on your holiday, when you visited/on your next holiday when you are visiting: ... ?

Base = All visiting other countries not only Britain (770)

B22. Which, if any, of the following did/will you do in Britain (England, Wales, Scotland)? Base = All visiting Britain (122)

Booking transport and activities

- Flights, airport transports and train travel between countries tend to be booked before leaving Australia. People visiting Britain are more likely to hire a car before leaving (49% v 39% average). Tickets for tourist attractions are booked mostly after leaving Australia, but over a third book them before leaving, suggesting a potential opportunity to increase bookings before leaving.
- Tickets for arts and sports events and tours are less likely to be purchased at all. But British sports is highly regarded, suggesting a potential advantage over other countries.



Not shown: Don't know (2-6%)

B24. Did you (or someone booking on your behalf) book any of the following on your holiday to/Do you expect to buy any of the following on your holiday to: ...? Base = All respondents (800), All visiting more than one country (303)



5. Are there other challenges and opportunities to create excitement about visiting Britain?

Are there other challenges and opportunities to create excitement about visiting Britain?

Buzzseekers are fairly familiar with Britain:

- a majority have friends or family living in or from Britain
- two thirds have been to Britain on holiday at least once
- a quarter have lived here
 - While this can be an asset, and can lead to positive perceptions of Britain, it can also be a barrier if Buzzseekers feel they know Britain too well and there is nothing new to discover.
 - Friends and family can help them move around, but they shouldn't be relied on to generate excitement.

A quarter say they have lived in Britain, but only for a few months.

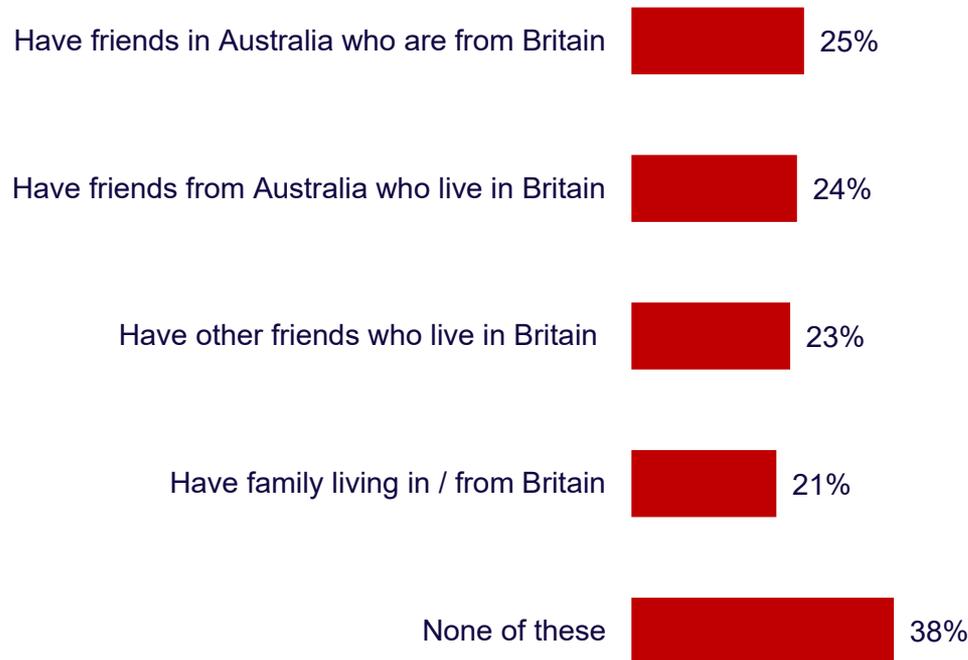
- Show previous visitors and those who lived in Britain that they missed out on unique experiences.

Large cities, such as London and Manchester, are the most attractive to Buzzseekers.

- Attract repeat visitors by pointing out there are other places to go and how easy they are to get to.

Friends and family in/from Britain

- A majority of Buzzseekers have a connection with Britain through friends and family.
- This can be an opportunity to link visiting friends and family with a holiday, but it also means Buzzseekers are familiar with Britain and might think there is nothing new to explore.



Friends and family can help them get around, but excitement about visiting different places be generated while they are still back in Australia.

Living in Britain

- Almost a quarter say they have lived in Britain in the past. Of these, a third were very short-term stays, of up to two months.



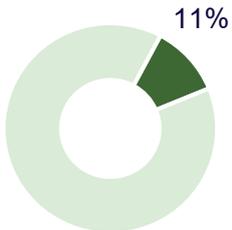
Have lived in Britain
23%

How long did you live in Britain?

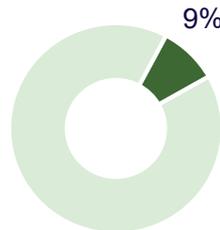


While they might feel they know Britain (according to Decisions and Influences), this is an opportunity to show them the things they missed last time they were in Britain.

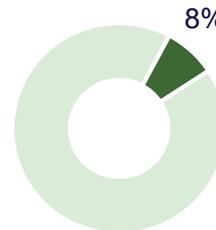
Worked in Britain



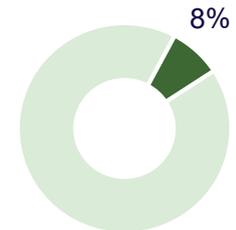
Studied in Britain
(at school, college or University)



Done business/trade with a
company/trader in Britain

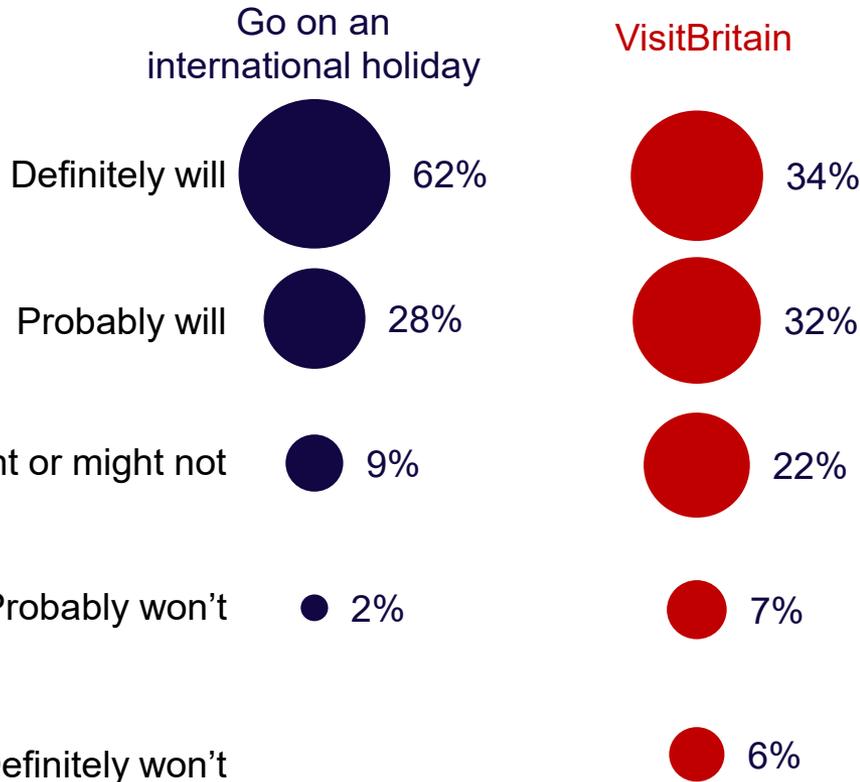


Been to Britain on a UK
Working Holiday Visa



Visiting Britain in the next 5 years

- Almost all Buzzseekers say they will go on an international holiday and two thirds that they will definitely or probably visit Britain in the next five years.
- Intention to visit is particularly high amongst those who have already visited.



66% definitely/probably will visit Britain

Those who have interacted with Britain in the past are more likely to say they will visit again:

- have been on holiday to Britain in the last 5 years (80%)
- have friends/family living in/from Britain (75%)
- have lived in Britain (73%)
- have worked in Britain* (76%)
- studied in Britain* (79%)
- have been to Britain on a working visa* (82%)

Also more likely to say they will visit:

Buzzseekers with children (73%)
those working full time (73%)

GfK Truth Index*

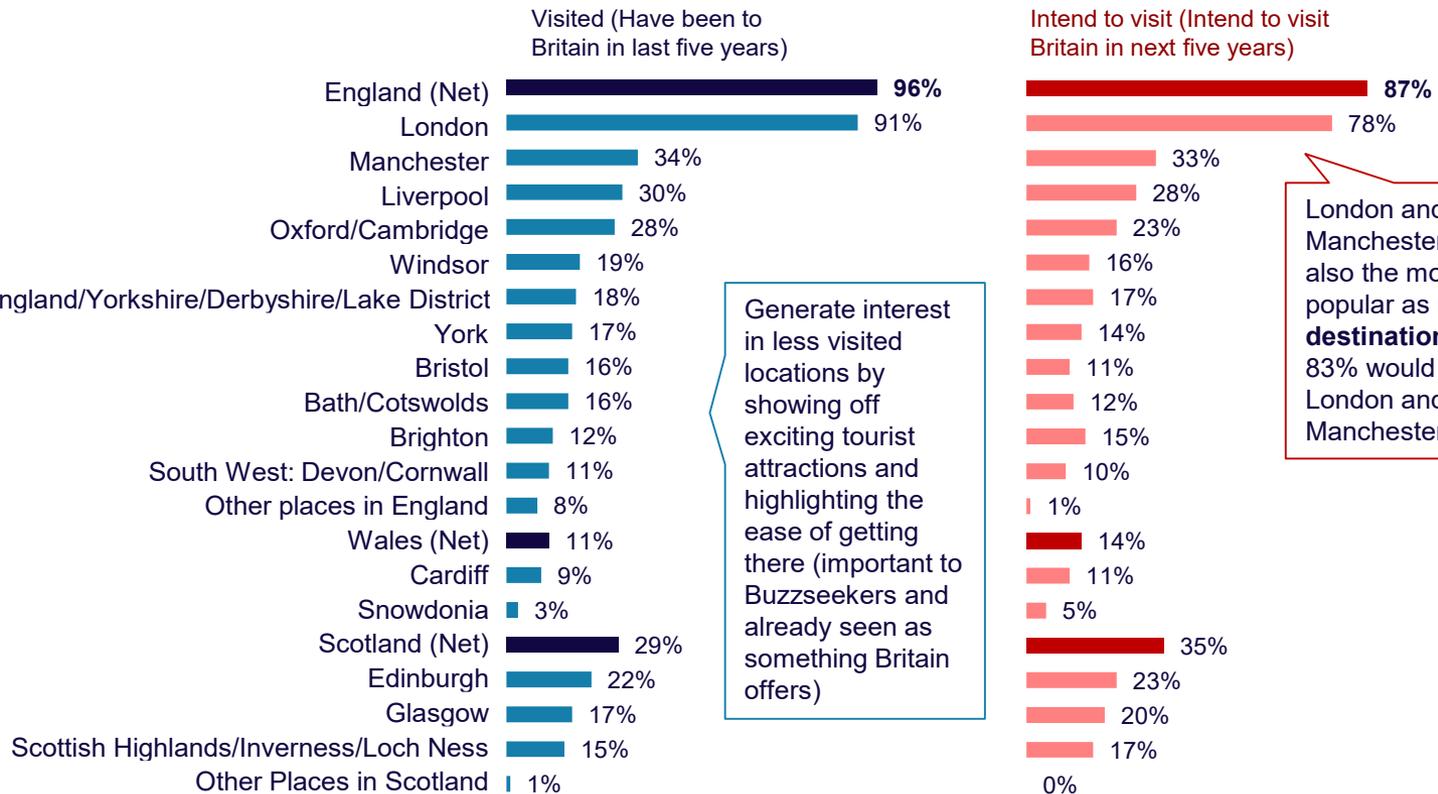
54% are actually likely to go on an international holiday and 34% are likely to visit Britain in the next 5 years

E04. How likely are you to go on an international holiday in the next 5 years? By international holiday we mean one where you are away from home for two or more nights. Base = All respondents (800); C06. How likely are you to visit Britain (again) in the next 5 years? Base = All except intenders who will visit Britain on next trip (789)

*GfK Truth Index is a composite that controls for respondents' tendency to overestimate their likelihood to act in the future.

Places visited/to visit in Britain

- London is by far the most visited place in Britain.
- Other places that Buzzseekers have or intend to visit tend to be large cities, like Manchester, Liverpool, Edinburgh, but also Oxford and Cambridge.



Generate interest in less visited locations by showing off exciting tourist attractions and highlighting the ease of getting there (important to Buzzseekers and already seen as something Britain offers)

London and Manchester are also the most popular as **repeat destinations**: 83% would re-visit London and 70% Manchester.

C01. Which of these places did/will you visit while in Britain? Base: All who visited Britain in last 5 years or intend to in next 12 months (196)

C07. Which of these are you likely to visit (again) in the next 5 years? Base: All intending to visit Britain in next 5 years, but not on next holiday (745)

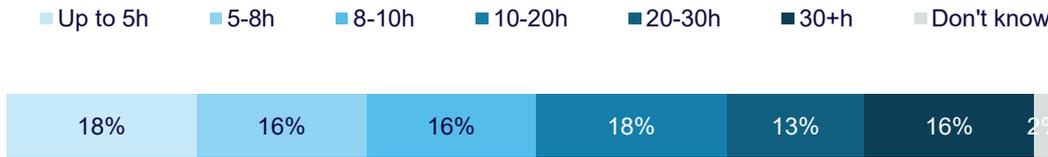


Appendix:

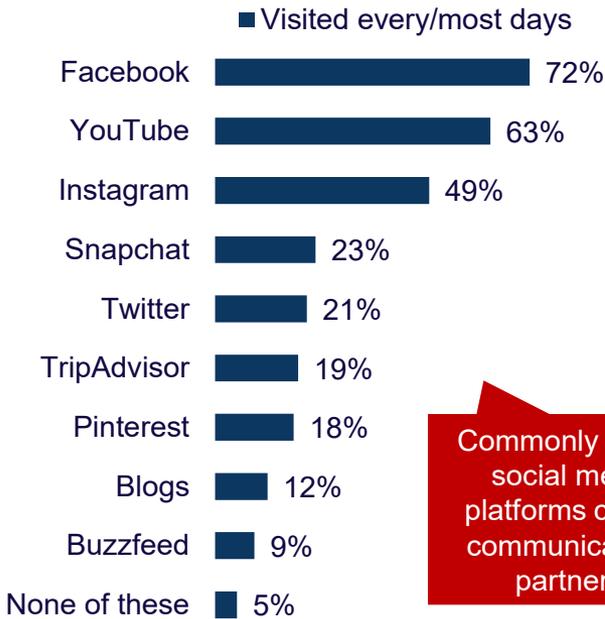
Media consumption and sample characteristics

Media consumption patterns

Time spent online during a usual week



A somewhat lower than expected TV usage and higher radio usage are in line with patterns seen across Australia (see VisitBritain's Market and Trade Profile report).



Commonly visited social media platforms can be communications partners.



Any TV: 54%

Any Radio: 51%

Regional newspapers: 24%

National newspapers: 34%

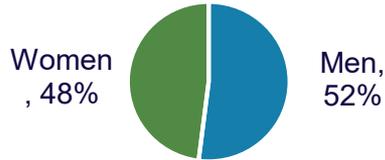
Magazines: 23%

Any online media: 67%

E06. Approximately how many hours in total do you spend actively using the Internet in a normal week? E07. Which, if any, of these do you visit every day or on most days? E08. And which, if any, of these do you use every day or most days?

Base = All respondents (800)/ All who go online (774)

Demographics



Sydney, including suburbs – 51%



Melbourne, including suburbs – 49%



Age



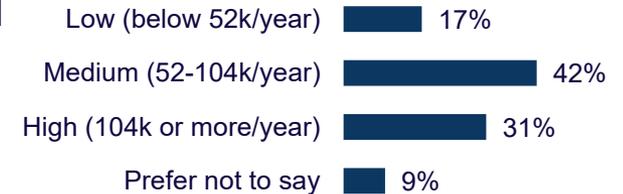
Working status



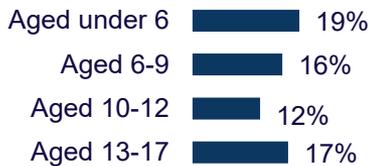
Household composition



Household income



Children in household



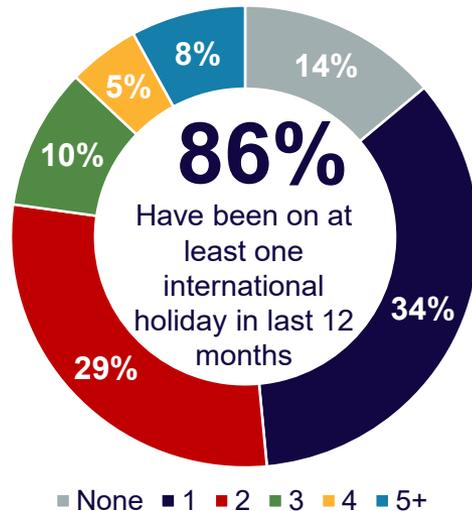
Please note: data has been weighted on gender and age. Weighted percentages are shown.

Previous international holidays 1/2

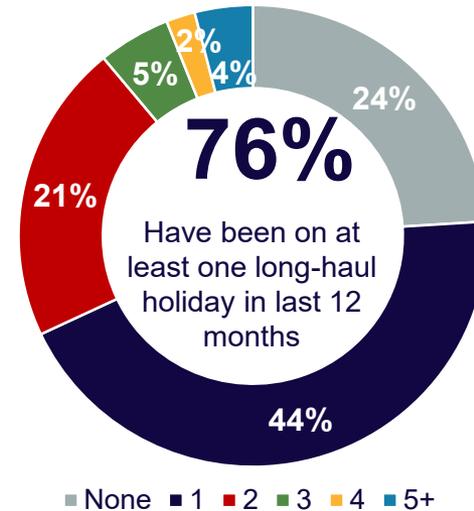
- Most Buzzseekers in the sample have been on an international holiday in the last 12 months and a majority have been on a long-haul holiday

(Please note, sample was selected to have been on mid- or long-haul holiday in last 5 years or intend to go in next 12 months).

International holidays in last 12 months



Long-haul holidays in last 12 months

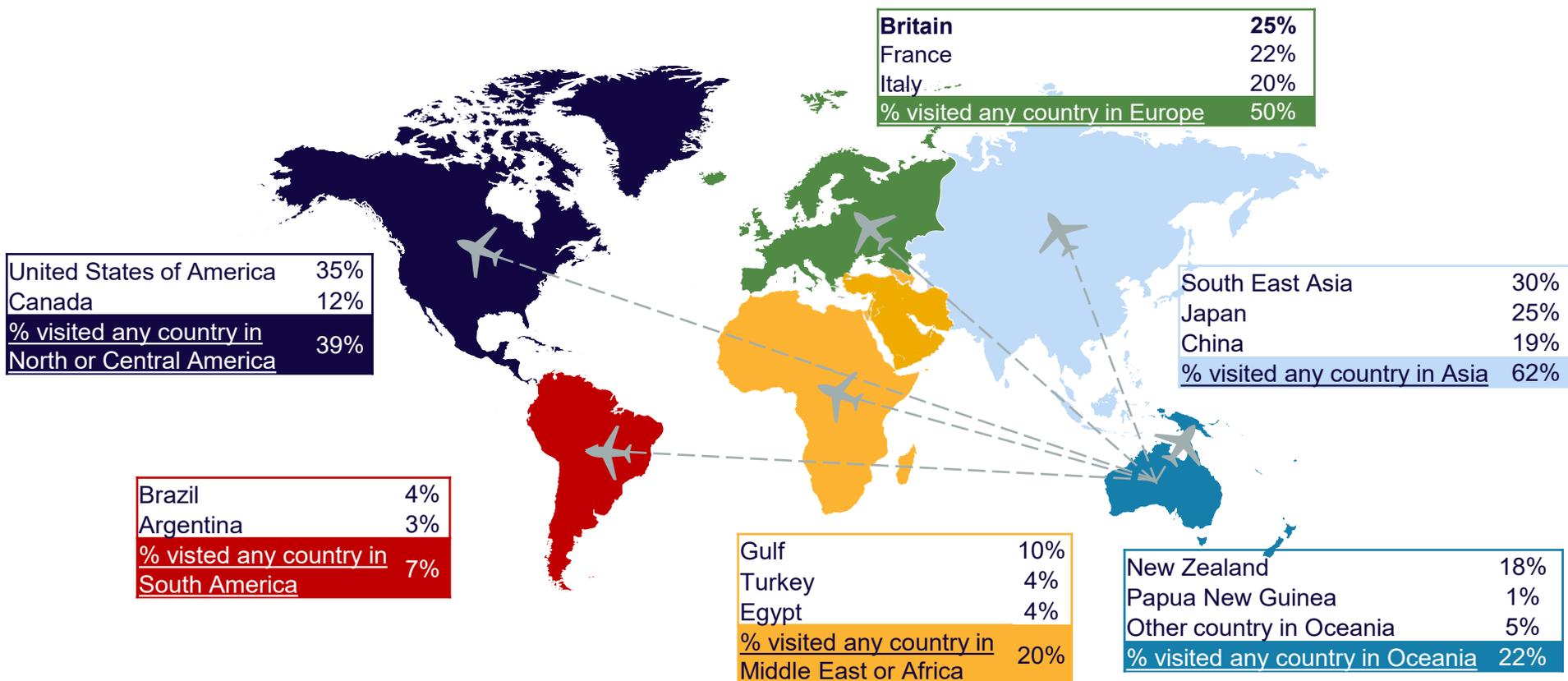


E01. In the last 12 months, approximately how many international holidays have you taken?
Base = All respondents (800)

E02. And for how many of those international holidays on how many did you have to take a flight of 10 hours or more? Base = All respondents (800)

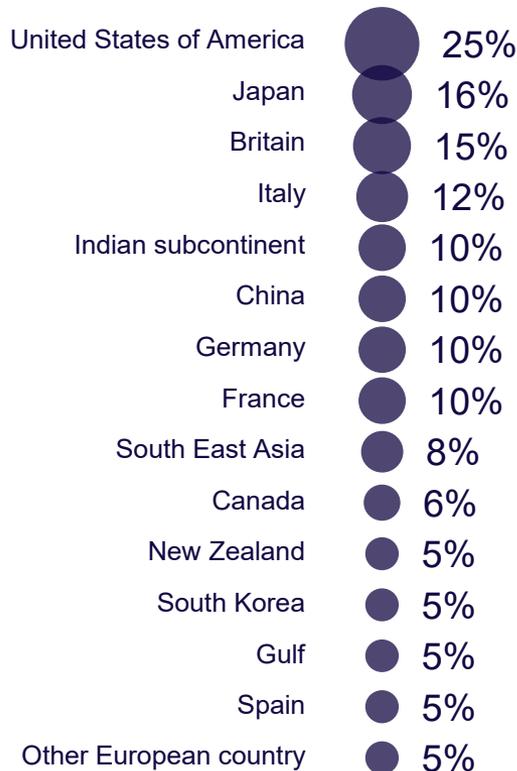
Where do Buzzseekers go on holiday?

- Amongst Buzzseekers who have been on a mid- or long-haul holiday in the last 5 years, Asia and Europe are the most commonly visited destinations. A quarter of Buzzseekers say they have visited Britain in the last five years. Respondents were excluded if they had only been/only intended to go on a short-haul-holiday*.



Where was their last international holiday?

- On their last international holiday, a quarter have been to the US. Japan and Britain also featured in the last holiday. Most of those who visited Britain also visited at least one other country.



15% travelled to Britain on their last international holiday:

- ▶ 11% travelled to at least one other country apart from Britain
- ▶ 4% travelled to Britain only

% visiting Britain and ... on the same last holiday:

- Italy 4%
- Germany 3%
- Ireland 3%
- Japan 3%

Previous international holidays 2/2

- They tend to spend between \$3,000 and \$15,000 on international holidays per year.





Australian Buzzseekers

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