



# MIDAS: Perceptions of Britain overseas

## 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 18<sup>th</sup> March and 23<sup>rd</sup> April 2022.

Country	Considerers	Visitors	Total	Country	Considerers	Visitors	Total
Australia	653	383	1,036	Japan	698	304	1,002
Austria	451	203	654	Netherlands	373	274	647
Belgium	398	263	661	New Zealand	421	252	673
Brazil	840	251	1,091	Norway	369	250	619
Canada	673	329	1,002	Poland	404	259	663
China	658	345	1,003	Saudi Arabia	369	278	647
Denmark	369	239	608	SEA*	737	298	1,035
France	661	342	1,003	South Korea	686	316	1,002
Germany	702	302	1,004	Spain	617	384	1,001
Hong Kong	391	261	652	Sweden	367	259	626
India	580	446	1,026	Switzerland	412	222	634
Irish Republic	184	513	697	UAE	378	284	662
Israel	382	234	616	USA	855	721	1,576
Italy	715	285	1,000	<b>TOTAL</b>	<b>14,343</b>	<b>8,497</b>	<b>22,840</b>

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



**How is Britain currently perceived by international tourists?**

**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



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	<i>An interesting mix of cultures from around the world</i>		3					2				3	2	
	<i>It's easy to get around once there</i>					1				3				2
	<i>It's easy to get to</i>									1	2			1
	<i>Is inclusive and accessible for visitors like me</i>										3			
	<i>Is good to visit any time of year</i>					2								
	<i>There are interesting local people to meet</i>							3						
	<i>Offers a lot of different experiences in one destination</i>							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

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	<i>An interesting mix of cultures from around the world</i>		3					2				3	2	
	<i>It's easy to get around once there</i>					1				3				2
	<i>It's easy to get to</i>									1	2			1
	<i>Is inclusive and accessible for visitors like me</i>										3			
	<i>Is good to visit any time of year</i>					2								
	<i>There are interesting local people to meet</i>								3					
	<i>Offers a lot of different experiences in one destination</i>							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	<i>An interesting mix of cultures from around the world</i>												2		
	<i>It's easy to get around once there</i>				2										
	<i>Has a thriving arts and contemporary culture scene</i>					2									
	<i>Offers experiences I want to share on social media</i>											3			3
	<i>There is a good variety of food and drink to try</i>								1						
	<i>A good place for treating myself (e.g., premium brands, gourmet food, etc.)</i>			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