AUSTRALIA EXPERIENCE SEEKERS
PEN PORTRAITS

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

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**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.

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

<table>
<thead>
<tr>
<th>Australia total traveller population</th>
<th>Experience Seekers</th>
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<tbody>
<tr>
<td>Budget Tourists (1-4)</td>
<td>23%</td>
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<table>
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<th>Priority Experience Seekers</th>
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<tr>
<td>Wellbeing involved 22% (+3%)</td>
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<tr>
<td>Sustainability engaged 10% (+1%)</td>
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<td>Inclusion seekers 26% (+1%)</td>
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**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 ACTIVITY 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%)

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**TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)**

- **Britain** 7.1 (vs 6.6)
- **Anywhere internationally** 6.2 (vs 5.4)

**SOURCE OF INSPIRATION FOR EXPERIENCE SEEKERS:**
- Recommendations by friends and family
- Travel bloggers and influencers
- Travel websites and web pages

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)
AUSTRALIA EXPERIENCE SEEKERS (26%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

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

- Premium Tourists (8-10)
- Mid-Range Tourists (5-7)
- Budget Tourists (1-4)

Experience Seekers Australia total traveller population

- 34%
- 47%
- 19%
- 23%
- 54%
- 23%

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

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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%)
- Has the opportunity to travel sustainably/responsibly (43%)
- Offers good value for money (35%)
- Is good to visit at any time of year (43%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Australia total)

Disproportionately more likely to consider...

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

SOURCES OF INSPIRATION (BIGGEST SKEWS):

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

VISITORS (vs total)

Britain Visitors (P5yrs) 37%
Considerers (P5yrs) 63%

GENDER

43%

57%
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:**

- **Online Marketplace**
- **Travel Agent via Personal Interaction**
- **Price Comparison Site**
- **Airline/Airline Holiday Companies**
- **Specialists Travel Agent or Tour Operator**
- **Online only Travel Agent or Tour Operator**
- **Peer Review Site**
- **None of the Above**

Experience Seekers use these resources more than other tourists from Australia, with 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.

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**RESOURCES FOR PLANNING:**

- **Australia total traveller population**
- **Experience Seekers**

- **Price Comparison Site**
- **Travel Agent via Personal Interaction**
- **Online only Travel Agent or Tour Operator**
- **Online Marketplace**
- **Airline/Airline Holiday Companies**
- **Specialists Travel Agent or Tour Operator**
- **Peer Review Site**
- **None of the Above**

**TOOLS:**

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

**EXPERIENCE SEEKER BOOKING HABITS:**

- **I didn’t make the booking / can’t recall**
- **I booked everything separately**
- **I booked some, but not all elements together**
- **I booked all key elements of the trip as one package**

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

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.

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

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<td>Mid-Range Tourists</td>
<td>41%</td>
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<td>Premium Tourists</td>
<td>45%</td>
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PRIORITY Experience Seekers are trend endorsers (vs total):
- Wellbeing involved: 23% (+8%)
- Sustainability engaged: 40% (+19%)
- Inclusion seekers: 40% (+15%)

GENDER
- Female: 45%
- Male: 55%

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

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)

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

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

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.

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.
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).
**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 three (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.

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.
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).

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:**
- Total traveller population
- Experience Seekers
- Price Comparison Site: 36% (37%);
- Online only Travel Agent or Tour Operator: 30% (33%);
- Online Marketplace: 28% (32%);
- Airline/Airline Holiday Companies: 31% (31%);
- Travel Agent via Personal Interaction: 28% (30%);
- Peer Review Site: 28% (30%);
- Specialits Travel Agent or Tour Operator: 26% (29%);
- None of the Above: 11% (8%)

**TOOLS:**
63% use more than one resource in the planning/booking phase vs 55% other tourists.

**PACKAGE VERSUS SEPARATE BOOKINGS:**
- Experience Seekers: 37%
- Total traveller population: 31%

**PACKAGE BOOKINGS:**
- Online market places more likely to be used to make package bookings (15%) vs 10% other tourists.

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

I didn't make the booking / can't recall
- I booked everything separately
- I booked some, but not all elements together
- I booked all key elements of the trip as one package

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.

12, Resources used; Experience Seekers n=6,677; total N=22,840