MIDAS: Premium Travellers

Nicholas Chan, Chris Warren, December 2023 with data from 2022

kubi kalloo

VISIT BRITAIN

VisitEngland

Starting point

In early 2022, VisitBritain conducted a piece of research looking at the motivations, influences, decisions and sustainability considerations of global travellers. The full report can be found here:

https://www.visitbritain.org/MIDAS-research-project

Though the study was focused on travellers in general, and few questions were asked about premium travel, some interesting findings came to light. In this report we highlight the data on premium travellers that are available.

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.

Country	Considerers	Visitors	Total
Australia	653	383	1,036
Austria	451	203	654
Belgium	398	263	661
Brazil	840	251	1,091
Canada	673	329	1,002
China	658	345	1,003
Denmark	369	239	608
France	661	342	1,003
Germany	702	302	1,004
Hong Kong	391	261	652
India	580	446	1,026
Irish Republic	184	513	697
Israel	382	234	616
Italy	715	285	1,000

Country	Considerers	Visitors	Total
Japan	698	304	1,002
Netherlands	373	274	647
New Zealand	421	252	673
Norway	369	250	619
Poland	404	259	663
Saudi Arabia	369	278	647
SEA*	737	298	1,035
South Korea	686	316	1,002
Spain	617	384	1,001
Sweden	367	259	626
Switzerland	412	222	634
UAE	378	284	662
USA	855	721	1,576
TOTAL	**14,343**	**8,497**	**22,840**

Premium Travellers

Identifying them and understanding their motivations and drivers

Key insights

- ***Premium travellers inspire:*** Premium travellers are important as they not only travel more frequently, they also inspire others to travel on social media

- ***Novelty experiences***: To attract premium travellers to visit Britain, it is important to provide new experiences as they are motivated by exploring new places

- ***Premium travellers' touchpoints:*** Premium travellers value expert knowledge, often engaging with travel agents in their customer journey. They engage with more touchpoints than non-premium travellers, with the exception of price comparison sites

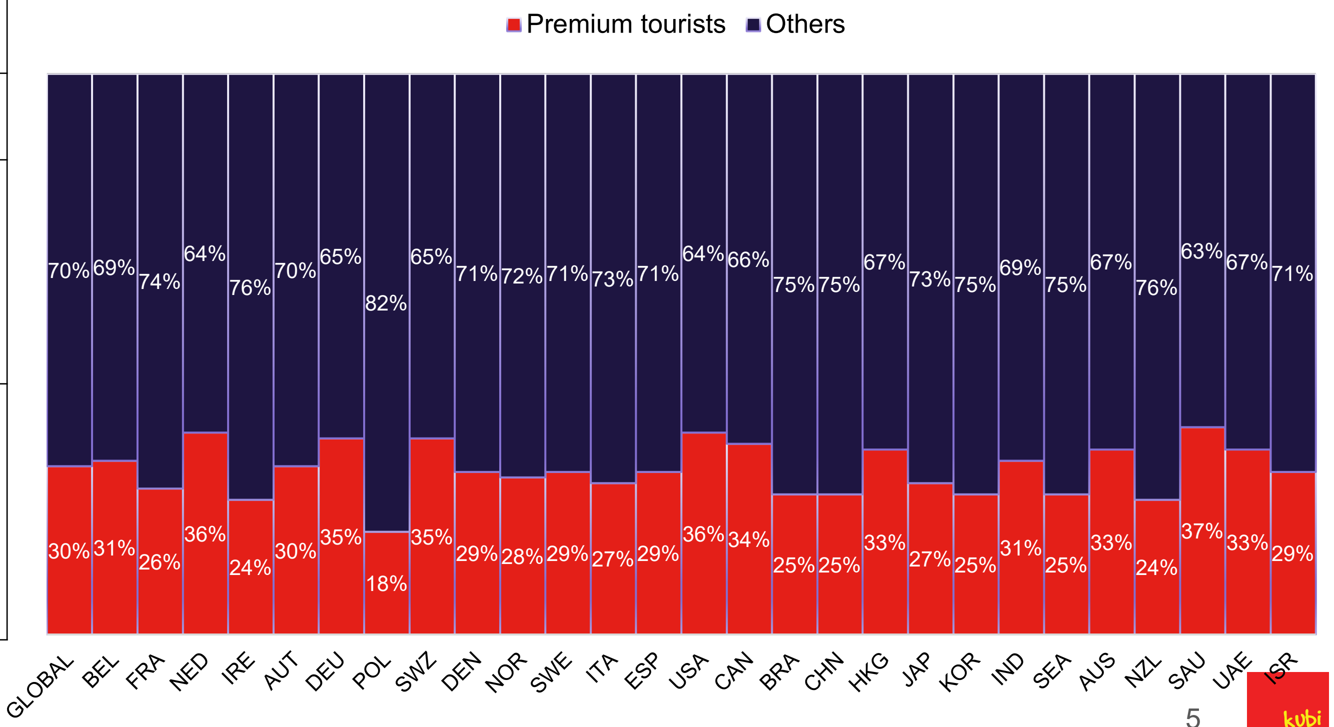
Image: VisitBritain/Mandy Williams

Defining Premium Travellers

Premium travellers, the mass affluent, have been identified using a slightly different definition in each market, representing around 30% per market

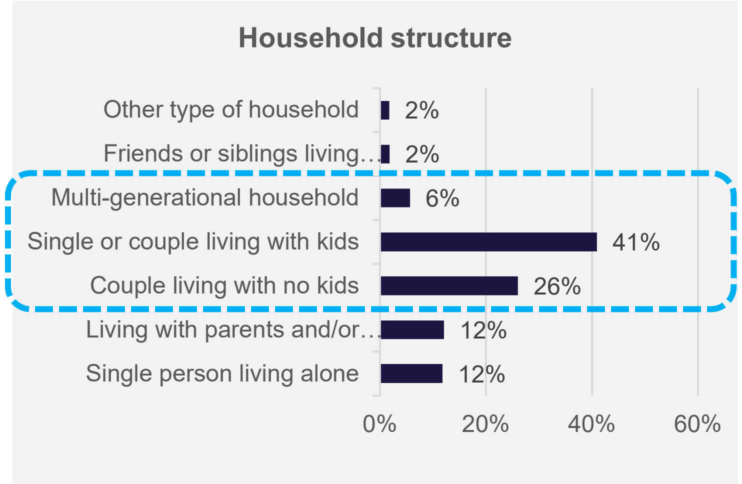
Household income is often a poor predictor of travel budget and so instead questions were asked on travel affordability (e.g which best describes your current financial situation) and relative budget (what kind of tourist might you be if visiting Britain in the future). If the respondents who answered most highly on these scales were selected as premium travellers, we would identify many more people in markets in which scale usage tends towards the extreme points (India, China) and fewer in which scale usage tends towards the mid-points (Central and Northern Europe).
The goal of this report was to identify a roughly comparable proportion of respondents from each market (set at 30% in order to ensure the target is sufficiently sizeable to later target) who represent those with greater travel budgets and to identify what sets them apart from their peers.

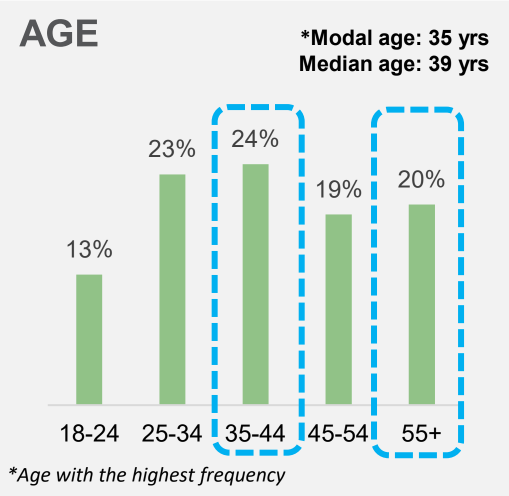
Countries/regions			
	China		Affordability top 50% Travel spending top 20%
	The Netherlands		Affordability top 50% Travel spending top 30%
	Hong Kong India Saudi Arabia UAE USA Brazil	Japan The Netherlands Poland Southeast Asia	Affordability top 50% Travel spending top 40%
	Australia Austria Belgium Canada Denmark France Germany Ireland	Israel Italy New Zealand Norway Spain Sweden Switzerland	Affordability top 50% Travel spending top 50%

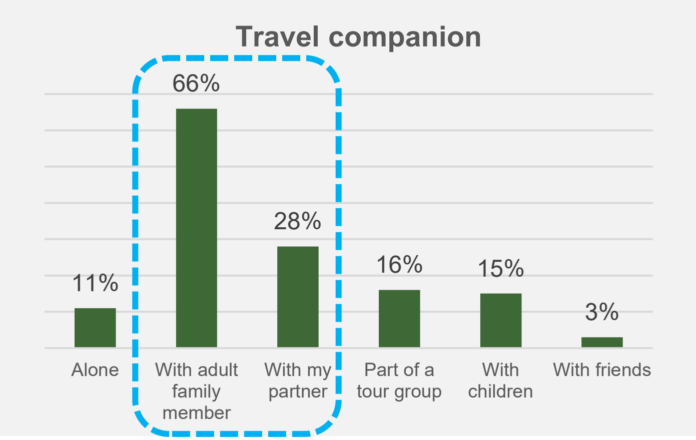


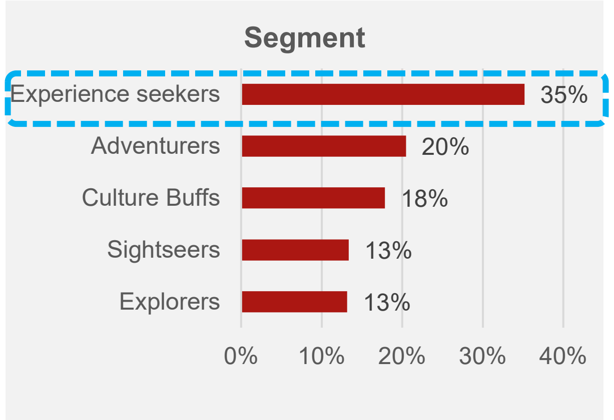
Defining Premium Travellers: J3. Which of the following best describes your current financial situation when it comes to things like taking leisure breaks or holidays like the ones we have been asking about today? Base size n=22,840
J4. Using the scale below, please indicate what kind of tourist you might be if visiting Britain in the future: Base n=22,840. Premium travellers in each market were estimated based on approximately

Premium travellers are most likely to be individuals who live with a partner or other family members









Significantly higher than average @95% confidence

Almost half of 25–44 year olds fall into the premium traveller segment

More than half of the premium travellers are ***couples*** living together

However, despite a high proportion living with children, most premium travellers ***travel with adult family members or with their partners***

1 in 3 premium travellers will be an ***Experience Seeker***
(Experience Seekers are a high opportunity traveller segment who love to explore new, unique experiences)
Experience Seekers Pen Portrait

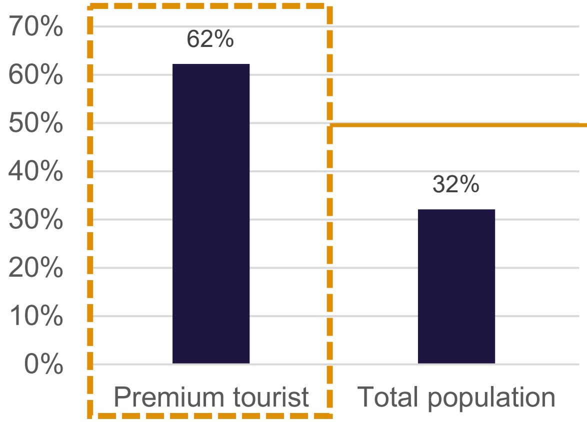
F2. And on this particular break or holiday, which of the following best describes who you were travelling with?
A2. Please tell us how old you are.
J1. Which of the following best describe the household in which you usually live?
Premium travellers base n=6,784

Premium travellers are comparatively favourable to Britain. They engage in more activities abroad and share on social media

Propensity to travel
(vs total traveller population)

Britain **8.2** (vs **6.9**)
Anywhere internationally **6.8** (vs **5.7**)

Offers experiences I want to share on social media



Creating social inspirations for others!

Higher frequency and higher value by definition

Top 10 activities	Premium travellers	Total population
Experience coastal places and scenery	72%	69%
Visit famous/iconic tourist attractions and places	71%	65%
Explore history and heritage (historical sites, architecture)	68%	63%
Enjoy fine dining experiences	63%	52%
Experience city life	63%	56%
Visit parks and gardens	62%	57%
Experience rural life and scenery	62%	58%
Visit famous shops or shopping streets/centres	61%	53%
Enjoy outdoor walks, hiking or cycling	60%	55%
Visit museums or galleries	58%	53%
Attend a cultural/historical exhibition or event	56%	50%
NET activities	**98%**	**97%**

*Premium travellers are very beneficial to the UK, as **high spending visitors offering inspiration** for others*

Premium travellers are ***more likely to travel***, both to Britain and anywhere internationally

Premium travellers are also more interested in ***experiences they can share on social media***. The content they post on social media can ***inspire others*** to travel

As premium travellers worry less about costs of activities, they also ***engage in more expensive activities*** such as enjoying fine dining experiences and visit famous shops.

D5: How likely is it that you will visit the following countries in the next 2 years for a holiday or short break? Please give a score between 1 and 10, where 1 would mean that you are not at all likely and 10 that you are very likely to visit that country in the next 2 years.
D3. Please tell us how important each of the following considerations are in choosing a destination for an international break or holiday?
D2. Below, are a list of things you might like to do when taking a break or holiday abroad. Top 3 Box scores indicated on 10-point interest scale

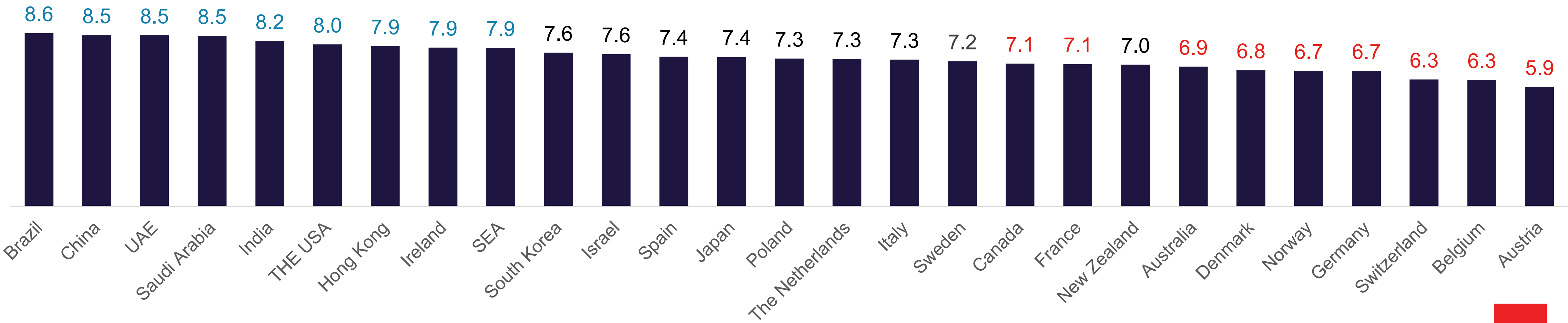
Italy and Spain are Britain's strongest competitors for Premium Travellers

Every market scored a range of competitor destinations alongside Britain. The following illustrates where Britain ranked in the propensity ratings, alongside its most immediate competitors (highest ranked excluding GB). European markets, but particularly those in Western and Northern Europe (excluding Sweden), illustrate a lower propensity to visit Britain when compared to other destinations. Premium travellers rank Britain broadly similarly to non-premium travellers

	BR	CN	UAE	SA	IND	USA	HK	IRE	SEA	KR	ISR	ESP	JP	POL	NET	IT	SWE	CAN	FR	NZ	AUS	DEN	NOR	DE	CH	BEL	AUT
Premium tourist	2nd	2nd	1st	1st	4th	1st	1st	1st	1st	1st	1st	3rd	2nd	2nd	2nd	2nd	1st	1st	3rd	1st	1st	3rd	4th	6th	4th	5th	5th
All Travellers	3rd	1st	1st	1st	3rd	1st	1st	1st	2nd	1st	1st	4th	2nd	2nd	2nd	2nd	1st	1st	3rd	1st	1st	2nd	3rd	5th	5th	5th	5th

Strongest competitor*

Premium Traveller's propensity to visit Britain (scored out of ten)



D5: How likely is it that you will visit the following countries in the next 2 years for a holiday or short break? Please give a score between 1 and 10, where 1 would mean that you are not at all likely and 10 that you are very likely to visit that country in the next 2 years.
Blue numbers are statistically higher than the average; red are statistically lower @ 95% confidence
*Based on highest ranking propensity to visit score excluding GB

Premium travellers have similar destination preferences to the general inbound traveller to Britain, with England being the most popular country to visit

England
90%


Image: VisitBritain/Layla Nia

Scotland
42%


Image: VisitBritain/Aurelie Four/@lecorgi

Wales
26%

Image: VisitBritain/Rama Knight

F7a. Please tell us which of the following countries you visited during your trip to Britain? Premium travellers and GB visitors base n=2,762

Similar to all global travellers, London is clearly the most popular destination in England for premium travellers. Premium travellers who came from long-haul markets visited more places across England

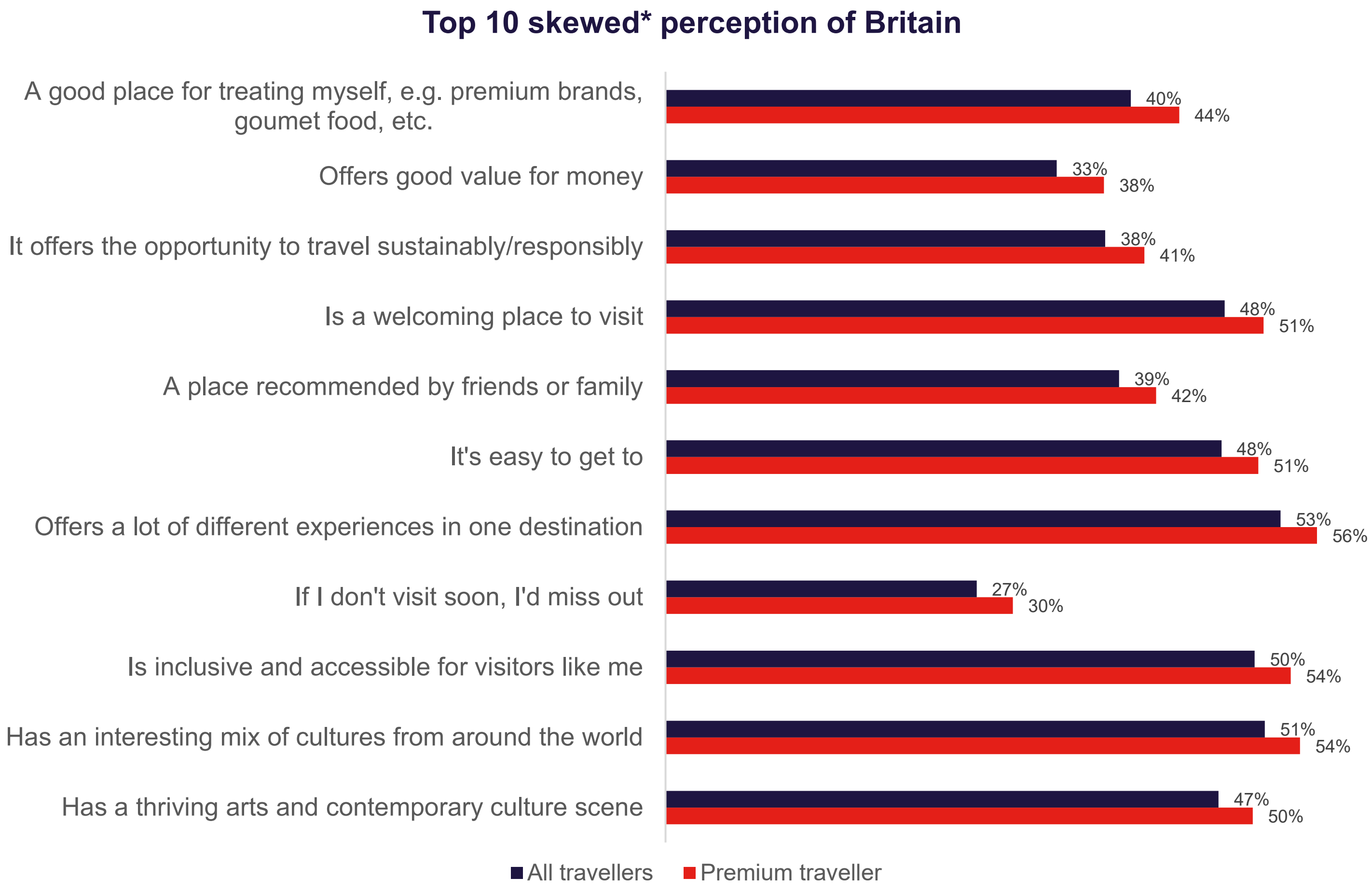
Places visited in England

Premium traveller destinations visited in England by market

	Total global premium travellers	Oceania	North Europe	Central Europe	West Europe	South Europe	North America	South America	North East Asia	South Asia	South East Asia	Middle East
North East	19%	16%	7%	11%	5%	10%	23%	26%	36%	30%	30%	27%
North West	33%	33%	18%	17%	17%	23%	39%	55%	48%	56%	59%	39%
Yorks & Humber	15%	25%	5%	10%	8%	14%	17%	23%	22%	29%	20%	17%
East Midlands	16%	19%	5%	8%	5%	7%	17%	20%	28%	26%	33%	24%
West Midlands	19%	25%	7%	9%	11%	14%	19%	20%	33%	50%	29%	22%
East of England	30%	28%	9%	17%	11%	21%	33%	46%	57%	45%	45%	44%
London	81%↑	83%	83%	87%	79%	92%	78%	93%	84%	82%	74%	74%
South East	29%	38%	12%	25%	17%	25%	29%	32%	46%	42%	31%	31%
South West	20%	34%	8%	17%	16%	12%	23%	21%	32%	20%	26%	18%

F7b: And which of the following places in England did you visit? Premium travellers and GB visitors base n=2,762
Red numbers significantly lower than total @95%; blue numbers significantly higher; blue arrows used to highlight disproportionate total skew

Premium travellers view Britain slightly more positively than the average traveller across a range of perceptions



Premium travellers vs total (Britain)	Premium travellers vs total (Other destinations)
4.1%	2.2%
4.0%	2.3%
3.4%	1.3%
3.3%	1.6%
3.2%	1.5%
3.2%	1.7%
3.1%	1.9%
3.1%	2.4%
3.1%	0.8%
3.0%	1.5%
2.9%	1.7%

Premium travellers appreciate Britain as a place to treat themselves.

This is important to them as 1 in 3 premium travellers want to have ***relaxing and recharging*** breaks.

Premium travellers are more likely to worry about missing out and have ***more urgency*** and ***motivation*** to visit Britain.

Britain is considered an ***accessible destination*** to ***treat oneself*** when compared with other destinations

See appendix for perception list by market

**Skewed perceptions is the perception score difference between premium travellers and total sample. Perceptions are ranked by biggest difference in scoring between premium travellers vs total sample*

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; premium travellers base n=6,784 global weighting

Premium travellers have broadly similar patterns of most-desired activities to non-premium travellers

Biggest skews. Premium travellers have more expensive preferences!

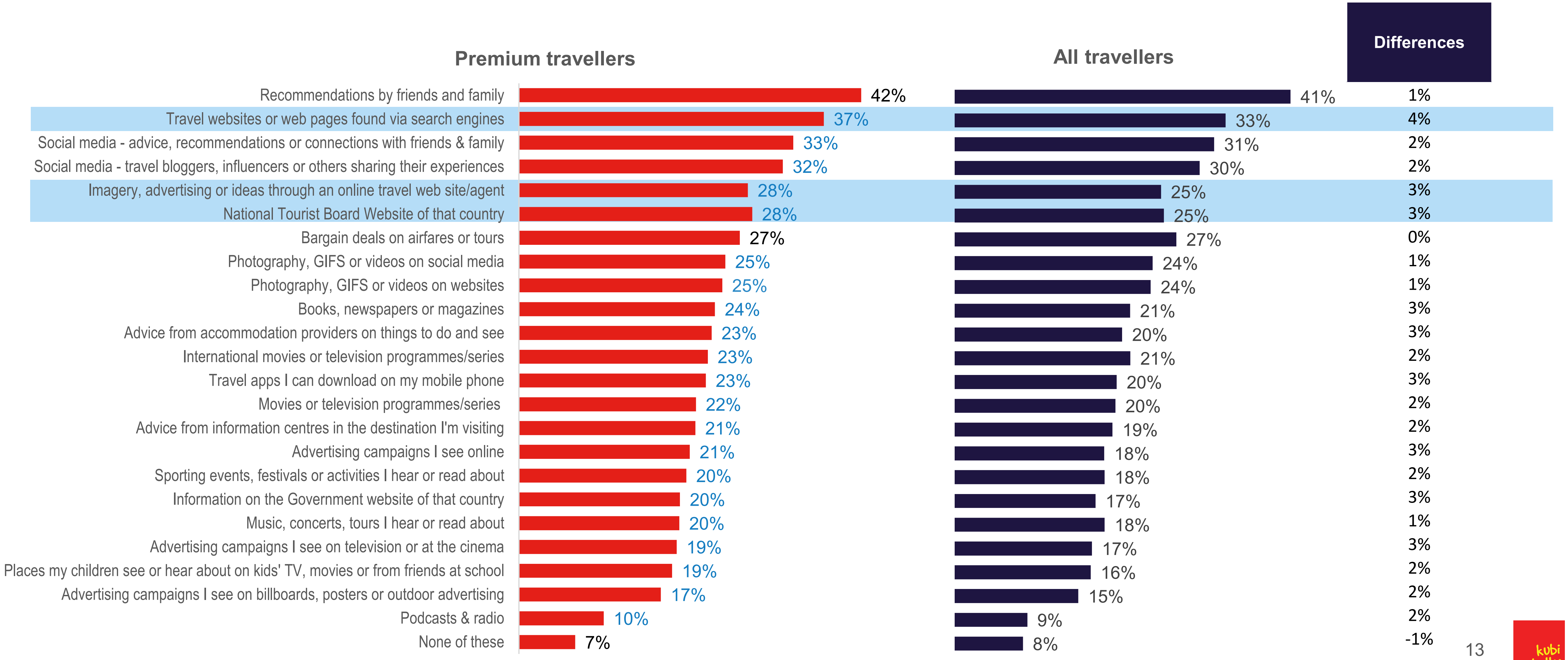
Premium travellers have ***similar desired activities*** ranked at the top.

However, the more ***expensive activities*** such as fine dining and visiting famous brands are more appealing to premium travellers.

DESIRED EXPERIENCES FOR TRIPS TO.... (Top 3 Box interest)	Premium Travellers	All travellers	DIFF
Explore local food and beverage specialities	74%	69%	5%
Experience coastal places and scenery	73%	69%	4%
Visit famous/iconic tourist attractions and places	72%	65%	7%
Explore history and heritage (historical sites, architecture)	69%	63%	6%
Enjoy fine dining experiences	64%	52%	13%
Experience city life	64%	56%	7%
Visit parks and gardens	63%	57%	5%
Experience rural life and scenery	62%	58%	4%
Visit famous shops or shopping streets/centres	62%	53%	9%
Enjoy outdoor walks, hiking or cycling	61%	55%	5%
Visit museums or galleries	59%	53%	6%
Attend a cultural/historical exhibition or event	57%	50%	7%
Guided tours/day excursions	56%	49%	7%
Socialising with locals	55%	49%	7%
Visit zoos, aquariums, and wildlife parks	54%	49%	5%
Self-driving tours	54%	47%	7%
Experience pubs, bars and clubs	52%	45%	7%
Attend a live music festival/event	51%	44%	6%
Visit a winery (e.g. wine tasting/ vineyard tour)	49%	42%	7%
Participate in action and adventure experiences	49%	42%	7%
Visit literary, music, film and TV locations	49%	43%	6%
Visit a brewery or distillery	46%	39%	7%
Visit theatre, opera, ballet or musicals	46%	39%	8%
Attend a sporting event	44%	35%	8%
Participate in wellness activities such as yoga, meditation or health retreats	39%	32%	7%
Participate in sport (golf, football, etc.)	38%	29%	9%
Attend a learning course (cooking, language etc)	36%	31%	5%
Volunteering	31%	26%	5%

D2. Below, are a list of things you might like to do when taking a break or holiday abroad. Top 3 Box scores indicated on 10-point interest scale
Please indicate how much you might like to do each on a break or holiday in Britain
Please indicate how much you might like to do each on a break or holiday abroad
Base n=22,840; Premium travellers base n=6,784

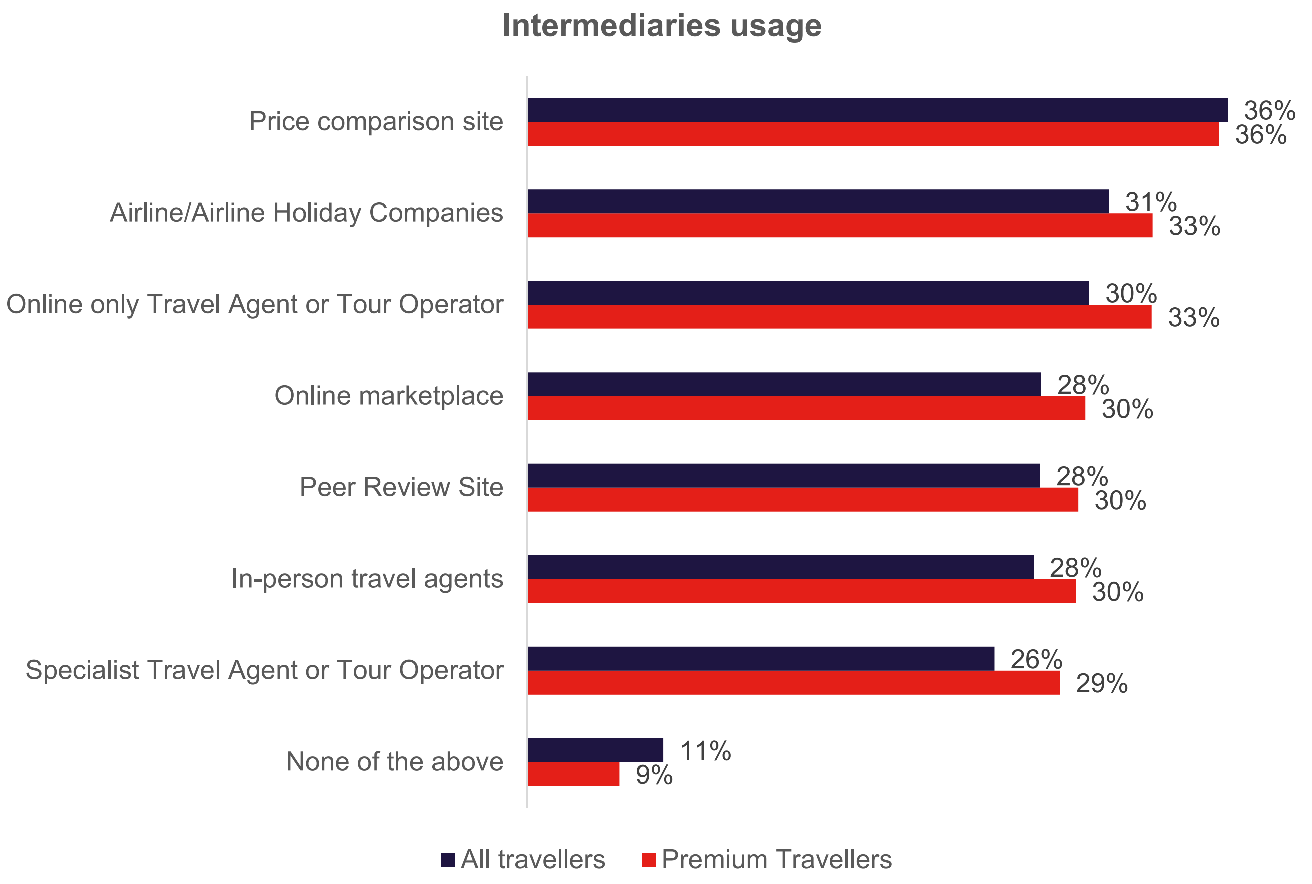
Premium travellers and other travellers find inspiration quite similarly. Premium travellers use more resources during the inspiration phase.



I1. Please select the main places/tools/sources which inspired you to consider the break or holiday. Select all that apply. Base n=, 22,840, premium travellers base n=6,784 global weighting applied

The premium traveller's customer journey

Premium travellers spend more time on different intermediaries along the customer journey. As they have fewer concerns about budgets, they spend less time on price comparison sites and are more likely to use travel agents.



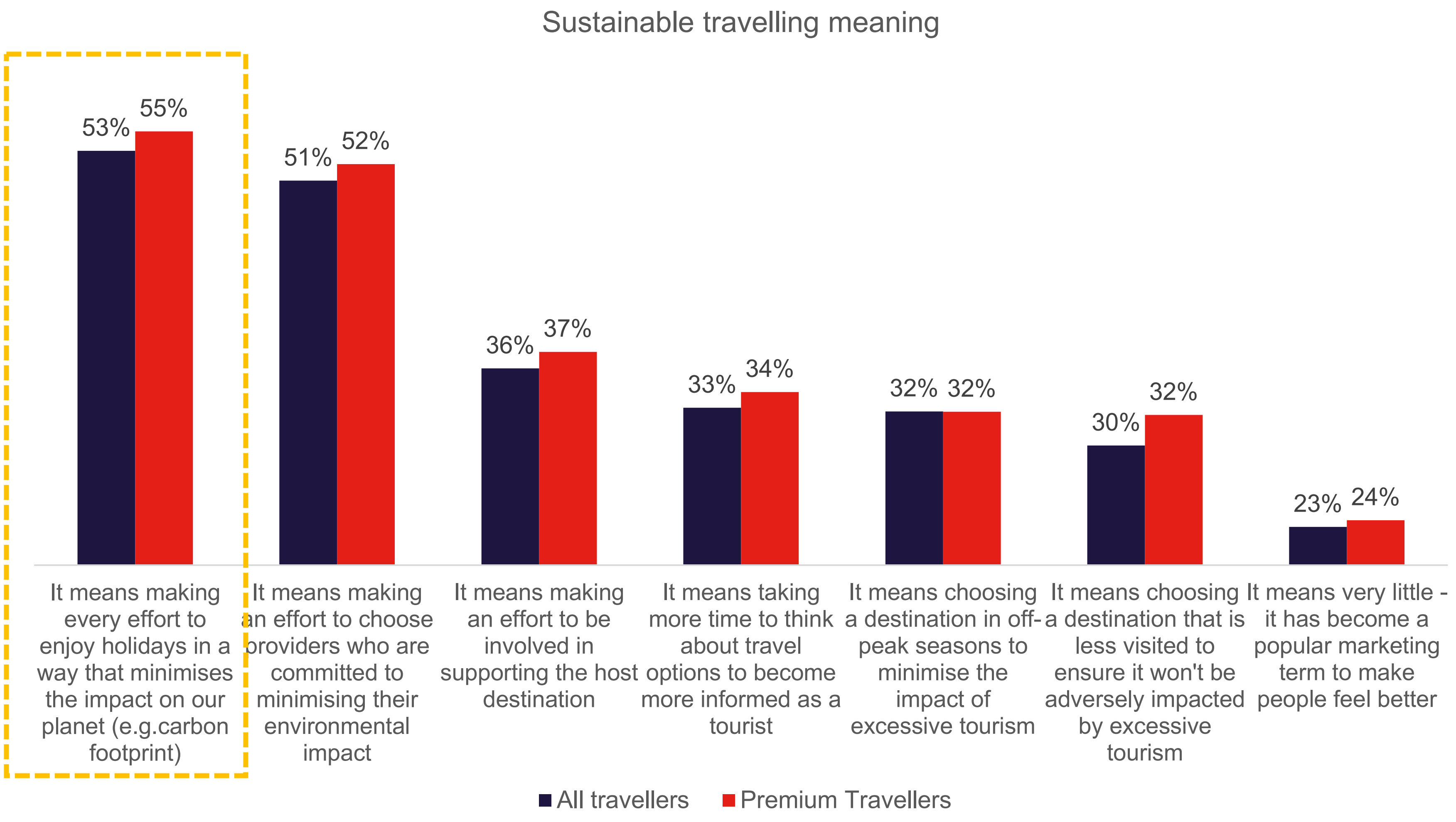
Premium travellers are ***more involved*** in their customer journeys and will use a wide range of intermediaries throughout their journey

Premium travellers are ***less price sensitive*** and use fewer price comparison site comparing with other travellers

Travel agents, regardless online or offline, play bigger roles in premium travellers' journey as they can provide ***expert knowledge*** to accommodate premium travellers' needs

I2: Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages? Multiple Response
Base: Total Global N=22,840, premium travellers base n=6,784; Global weighting applied

Premium travellers have similar attitudes on sustainable travel to non-premium travellers



*Premium travellers also consider the definition of sustainable travel to mean **making every effort** to enjoy holidays that minimize the impact on the planet.*

This is similar to non-premium travellers and they also have similar barriers to sustainable travel

*Premium travellers find it difficult to **access** sustainable providers*

*Premium travellers also **distrust** destinations and providers claiming to be 'green' when they may not be*

H1. As a traveller, what does sustainable/responsible tourism mean to you? Please rank the top 3 statements below that best reflect what sustainable/responsible tourism mean to you.
Total base n=22,840; premium tourists n=6,784

Premium travellers are less concerned about the cost of sustainable tourism, but they are still deterred by other barriers

H1. As a traveller, what does sustainable/responsible tourism mean to you? Please rank the top 3 statements below that best reflect what sustainable/responsible tourism mean to you.
Total base n=22,840; premium tourists n=6,784

Premium travellers are significantly more likely to opt for sustainable options

	Previous experience		Plans in the future	
	Non premium travellers	Premium travellers	Non premium travellers	Premium travellers
Paying a fee/premium to offset carbon emissions of travel or accommodation	13%	17%	15%	19%
Choose a destination on the basis of its sustainable/responsible tourism credentials	16%	20%	19%	23%
Using public transport or greener transport alternatives to reduce pollution	34%	33%	33%	32%
Visiting less well-known places/ attractions to avoid the adverse impacts of excessive-tourism	23%	26%	25%	26%
Staying in eco or environmentally-accredited accommodation, or using providers dedicated to waste minimisation	18%	22%	22%	26%
Research fully transparent information about businesses I might be choosing from	14%	18%	18%	20%
Signing up to apps, clubs or services that help me make sustainable/responsible choices	13%	15%	15%	18%
Supporting tourism businesses that invest in local people and economies	19%	23%	22%	25%
Supporting tourism businesses that invest in sustainable technologies, energy and resources	15%	19%	19%	23%
Buying local when I can	41%	42%	39%	38%
Choosing options that allow me to 'live like a local' and have authentic experiences	23%	23%	25%	24%
Buying sustainable/responsible food and beverage offers	22%	26%	24%	27%
Enjoying pristine, unpolluted natural environments	30%	33%	31%	32%
Choosing accommodation or services that showcase their green or waste reduction credentials	17%	22%	22%	24%
Choosing destinations that are truly committed to preserving natural and cultural heritage	23%	26%	26%	27%
Visiting places outside of peak season to lighten the load of over-tourism	28%	30%	29%	29%
Making a sustainable/responsible tourism pledge	14%	18%	17%	20%
None of the above	10%	8%	8%	7%

Top 5 skew for both future travel plans and previous travel experience

Overall, premium travellers are more engaged with sustainable travel options.

However, sustainability engagement remains low, as only around 1 in 4 premium travellers claim that they will plan or have previously adopted sustainable options.

H2a. And when it comes to taking leisure breaks or holidays abroad, which of the following things have you done in the past?
H2b. And which do you plan to do on future breaks or holidays?
Total base n=22,840; premium travellers n=6,784

Premium travellers in Brazil are more likely to opt for sustainable options than the general population

	Previous experience			Plans in the future		
	Country w/ biggest skew	Skew (premium traveller vs all)	Global skew	Country w/ biggest skew	Skew (premium traveller vs all)	Global skew
Paying a fee/premium to offset carbon emissions of travel or accommodation	**POL**	12%	3%	**BR**	10%	3%
Choose a destination on the basis of its sustainable/responsible tourism credentials	**BR**	9%	3%	**SAU**	9%	3%
Using public transport or greener transport alternatives to reduce pollution	**POL**	4%	-1%	**BEL**	5%	-1%
Visiting less well-known places/ attractions to avoid the adverse impacts of excessive-tourism	**BR**	8%	2%	**IRE**	5%	0%
Staying in eco or environmentally-accredited accommodation, or using providers dedicated to waste minimisation	**BR**	13%	3%	**BR**	9%	3%
Research fully transparent information about businesses I might be choosing from	**BR**	9%	3%	**NZ**	5%	1%
Signing up to apps, clubs or services that help me make sustainable/responsible choices	**BR**	8%	2%	**CN**	8%	2%
Supporting tourism businesses that invest in local people and economies	**POL**	7%	3%	**UAE**	7%	2%
Supporting tourism businesses that invest in sustainable technologies, energy and resources	**BR**	13%	3%	**DEN**	8%	2%
Buying local when I can	**IRE**	9%	1%	**DEN**	11%	-1%
Choosing options that allow me to 'live like a local' and have authentic experiences	**UAE**	6%	0	**BR**	6%	0%
Buying sustainable/responsible food and beverage offers	**BR**	13%	3%	**BR**	9%	2%
Enjoying pristine, unpolluted natural environments	**NZ**	9%	2%	**NZ**	8%	1%
Choosing accommodation or services that showcase their green or waste reduction credentials	**SEA**	8%	3%	**SEA**	12%	2%
Choosing destinations that are truly committed to preserving natural and cultural heritage	**BR**	9%	2%	**DEN**	7%	1%
Visiting places outside of peak season to lighten the load of over-tourism	**NZ**	5%	1%	**BEL**	5%	0%
Making a sustainable/responsible tourism pledge	**SEA**	9%	3%	**HK**	8%	2%
None of the above	**AUS**	2%	-2%	**NZ**	4%	-1%

Overall, premium travellers are more likely to use sustainable travel options in the future. They also had more experience in the past with sustainable options.

Brazil's premium travellers are also significantly more likely to be more engaged with sustainable options when they are travelling

H2a. And when it comes to taking leisure breaks or holidays abroad, which of the following things have you done in the past?
H2b. And which do you plan to do on future breaks or holidays?
Total base n=22,840; premium travellers n=6,784

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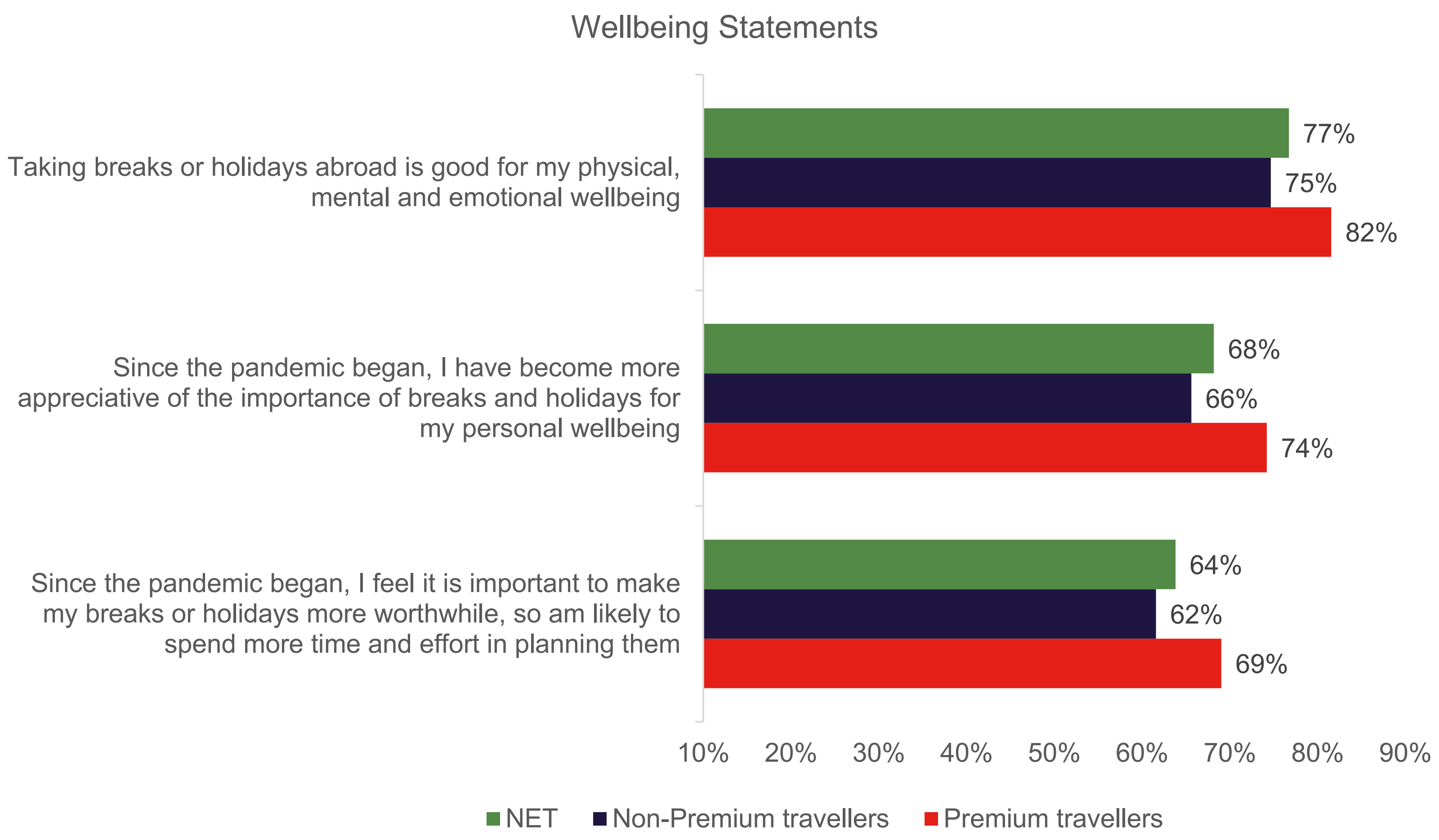
Travelling abroad plays an important role in premium travellers' wellbeing



- Premium tourists are more likely to consider travelling abroad an ***important element of their wellbeing***
- The ***global pandemic*** has shifted perceptions of wellbeing among premium tourists
- Premium tourists are also more likely to ***spend more time and effort*** to plan and book their travels

H4. Please tell us how much you agree or disagree with the following statements: Total base n=22,840; premium tourists base n=6,784

Premium travellers, defined as approximately the top **25%-33% of spenders** in each market are not just higher value but also **more frequent travellers**. Further, they are more likely to **share social media content and act as influencers** amongst the traveller population.

The danger for Britain is that premium travellers **seek out new experiences** and a higher proportion have already visited Britain.

However, motivated by the opportunities to treat themselves and the view that Britain is welcoming, they have greater **urgency and motivation** to visit Britain than non-premium travellers.

While premium travellers have a similar set of desired activities when travelling as non-premium travellers, they are also **interested in more expensive activities** such as fine dining experiences and shopping, activities we must continue to highlight to them.

Though premium travellers have **similar attitudes towards** sustainable travel as non-premium travellers, they have the means to make **more green choices**.

Travelling abroad plays an important role in their **wellbeing**.

In Summary

Premium travellers travel more frequently and are by definition, more valuable.

They are also more active on social media and therefore have the potential to inspire others to travel.

Premium travellers are also interested in more activities as they are less concerned about budgets but generally don't look for entirely different types of breaks to non-premium travellers.

Appendix

Traveller perceptions of Britain by market (top 10 skews)

Total sample	AUS	AUT	BEL	BRA	CAN	CN	DEN	FRA	DE	HK	IND	IRE	ITA	JP	NED	NZ	NOR	POL	ISR	SAU	UAE	SEA	SK	SPA	SWE	CH	USA	NET
A good place for treating myself, e.g. premium brands, gourmet food, etc.	45%	31%	29%	43%	46%	41%	32%	34%	32%	45%	53%	39%	27%	39%	34%	46%	32%	44%	39%	54%	48%	50%	36%	34%	38%	34%	44%	**40%**
Offers good value for money	34%	16%	29%	35%	36%	36%	30%	24%	30%	39%	51%	30%	18%	16%	32%	35%	34%	35%	44%	45%	41%	47%	19%	31%	35%	26%	42%	**33%**
It offers the opportunity to travel sustainably/responsibly	41%	23%	29%	47%	43%	40%	24%	33%	30%	39%	52%	38%	31%	32%	31%	38%	26%	47%	37%	49%	44%	51%	36%	38%	35%	31%	42%	**38%**
Is a welcoming place to visit	64%	44%	43%	39%	61%	35%	52%	44%	45%	40%	55%	45%	35%	37%	43%	63%	52%	49%	51%	48%	49%	57%	34%	34%	55%	50%	56%	**48%**
A place recommended by friends or family	49%	26%	26%	42%	47%	35%	33%	34%	28%	43%	52%	37%	34%	26%	29%	48%	38%	38%	46%	49%	45%	49%	32%	39%	40%	32%	43%	**39%**
It's easy to get to	43%	31%	38%	47%	57%	38%	51%	49%	39%	48%	54%	78%	37%	22%	41%	47%	70%	48%	57%	49%	44%	55%	27%	51%	64%	35%	53%	**48%**
Offers a lot of different experiences in one destination	64%	62%	49%	55%	63%	38%	54%	48%	56%	43%	52%	50%	47%	41%	52%	67%	59%	53%	51%	49%	48%	55%	38%	50%	56%	58%	57%	**53%**
If I don't visit soon, I'd miss out	23%	20%	18%	46%	27%	31%	19%	27%	25%	26%	44%	13%	22%	14%	15%	21%	19%	24%	29%	41%	37%	42%	30%	23%	21%	19%	33%	**27%**
Is inclusive and accessible for visitors like me	66%	32%	48%	49%	59%	39%	53%	45%	38%	41%	55%	58%	41%	37%	54%	67%	60%	46%	57%	50%	49%	57%	37%	47%	61%	44%	58%	**50%**
Has an interesting mix of cultures from around the world	62%	60%	50%	52%	59%	37%	47%	51%	53%	46%	52%	54%	55%	42%	45%	60%	53%	60%	40%	55%	50%	52%	30%	55%	50%	54%	54%	**51%**
Has a thriving arts and contemporary culture scene	52%	52%	44%	51%	53%	39%	45%	45%	49%	46%	52%	39%	47%	54%	45%	53%	37%	45%	54%	50%	47%	56%	43%	47%	37%	47%	51%	**47%**

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; premium travellers base n=6,784 global weighting

Premium Traveller perceptions of Britain by market (top 10 skews)

Premium travellers	AUS	AUT	BEL	BRA	CAN	CN	DEN	FRA	DE	HK	IND	IRE	ITA	JP	NED	NZ	NOR	POL	ISR	SAU	UAE	SEA	SK	SPA	SWE	CH	USA	NET
A good place for treating myself, e.g. premium brands, gourmet food, etc.	49%	34%	27%	49%	50%	45%	39%	33%	33%	48%	60%	47%	31%	42%	40%	49%	41%	49%	37%	60%	53%	56%	39%	38%	39%	41%	49%	44%
Offers good value for money	34%	17%	31%	44%	42%	33%	37%	22%	29%	39%	60%	29%	19%	21%	36%	41%	37%	42%	49%	47%	47%	56%	23%	35%	39%	29%	50%	38%
It offers the opportunity to travel sustainably/responsibly	42%	22%	32%	55%	48%	41%	26%	31%	35%	43%	57%	42%	37%	33%	31%	37%	33%	47%	34%	55%	50%	55%	39%	45%	38%	30%	48%	41%
Is a welcoming place to visit	67%	48%	44%	48%	64%	32%	61%	41%	46%	44%	61%	50%	33%	37%	48%	68%	51%	46%	58%	54%	59%	61%	32%	37%	55%	49%	60%	51%
A place recommended by friends or family	50%	31%	25%	50%	52%	34%	37%	33%	30%	46%	56%	41%	37%	31%	29%	54%	42%	45%	50%	56%	47%	53%	33%	45%	38%	30%	49%	42%
It's easy to get to	42%	35%	40%	54%	62%	38%	59%	55%	39%	52%	56%	82%	38%	24%	48%	50%	71%	52%	56%	55%	47%	58%	29%	56%	61%	43%	59%	51%
Offers a lot of different experiences in one destination	64%	66%	53%	57%	66%	38%	64%	47%	51%	45%	59%	52%	49%	40%	50%	71%	62%	50%	49%	55%	56%	55%	39%	53%	56%	67%	64%	55%
If I don't visit soon, I'd miss out	22%	21%	17%	55%	33%	36%	21%	24%	29%	26%	45%	13%	28%	20%	21%	18%	24%	34%	27%	50%	47%	45%	28%	25%	22%	18%	39%	30%
Is inclusive and accessible for visitors like me	68%	34%	49%	55%	60%	37%	62%	42%	41%	50%	61%	59%	39%	38%	55%	74%	63%	53%	60%	57%	51%	59%	40%	53%	62%	44%	61%	53%
Has an interesting mix of cultures from around the world	64%	62%	54%	56%	61%	36%	54%	51%	53%	47%	61%	57%	54%	39%	46%	64%	58%	55%	37%	66%	53%	53%	31%	57%	49%	57%	60%	54%
Has a thriving arts and contemporary culture scene	53%	53%	48%	53%	59%	42%	52%	45%	47%	46%	58%	39%	47%	51%	48%	57%	36%	50%	52%	55%	51%	59%	45%	51%	34%	48%	57%	50%

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Premium travellers vs total (Britain) % difference

	AUS	AUT	BEL	BRA	CAN	CN	DEN	FRA	DE	HK	IND	IRE	ITA	JP	NED	NZ	NOR	POL	ISR	SAU	UAE	SEA	SK	SPA	SWE	CH	USA	NET
A good place for treating myself, e.g. premium brands, goumet food, etc.	4%	2%	-2%	6%	3%	3%	8%	-1%	1%	2%	7%	8%	4%	3%	6%	3%	8%	5%	-2%	6%	5%	6%	3%	4%	0%	7%	5%	4%
Offers good value for money	0%	1%	2%	10%	7%	-3%	7%	-2%	-1%	0%	8%	-1%	1%	5%	4%	6%	3%	7%	5%	1%	6%	9%	4%	5%	4%	3%	8%	4%
It offers the opportunity to travel sustainably/responsibly	1%	-1%	3%	8%	5%	1%	2%	-3%	4%	4%	5%	3%	6%	1%	0%	-1%	7%	0%	-3%	7%	6%	5%	4%	7%	3%	0%	6%	4%
Is a welcoming place to visit	2%	4%	1%	9%	3%	-3%	9%	-3%	1%	3%	6%	5%	-1%	-1%	5%	5%	0%	-3%	6%	6%	9%	4%	-2%	3%	1%	-2%	4%	3%
A place recommended by friends or family	2%	5%	-1%	8%	4%	-1%	5%	-1%	2%	3%	4%	4%	3%	6%	1%	6%	3%	8%	3%	6%	2%	4%	1%	6%	-2%	-1%	6%	4%
It's easy to get to	-2%	4%	2%	7%	5%	0%	7%	6%	1%	4%	2%	3%	1%	2%	7%	3%	1%	4%	-1%	6%	3%	3%	2%	5%	-3%	7%	6%	3%
Offers a lot of different experiences in one destination	0%	4%	4%	2%	3%	-1%	10%	-1%	-5%	2%	7%	2%	1%	-1%	-1%	4%	3%	-3%	-2%	6%	7%	0%	1%	2%	0%	9%	7%	3%
If I don't visit soon, I'd miss out	-1%	1%	-1%	9%	6%	4%	1%	-2%	4%	0%	1%	0%	7%	6%	7%	-2%	5%	10%	-1%	9%	10%	3%	-2%	1%	1%	-1%	6%	4%
Is inclusive and accessible for visitors like me	2%	2%	1%	6%	1%	-2%	9%	-4%	3%	9%	6%	1%	-2%	0%	1%	7%	3%	8%	3%	7%	2%	2%	3%	6%	1%	-1%	3%	3%
Has an interesting mix of cultures from around the world	2%	2%	4%	3%	1%	-1%	7%	0%	0%	1%	9%	3%	0%	-2%	1%	4%	4%	-4%	-3%	12%	3%	1%	2%	1%	-1%	2%	6%	3%
Has a thriving arts and contemporary culture scene	1%	1%	4%	2%	5%	2%	7%	0%	-2%	0%	6%	-1%	0%	-3%	3%	4%	-1%	5%	-2%	5%	5%	3%	3%	4%	-3%	1%	6%	3%

E1. Below, are some statements which may relate to destinations you might consider for a break or holiday abroad.
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The sample, fieldwork and timing

All international leisure travellers, defined as:

- Having travelled outside their immediate region[1] in the past 5 years or planning to do so within 2 years of post-COVID travel restrictions lifting
- Non-rejectors of Britain as a tourism destination
- Qualifying via holding or intending to hold a passport within next 2 years except for European tourists. As the requirement to hold a passport for European visitors only became mandatory in 2021, we wanted to ensure we captured the opinion of travellers who may still be able to obtain one, but may be unaware of the change

A mix of general population international tourists (selected via random, nationally representative sampling) and a boost to achieve a minimum of N=200 visitors (having visited Britain in the past 5 years. Bases for each sub-sample illustrated on page 2).

Fieldwork was completed via online surveys (20minutes) translated into local languages.

Fieldwork took place between 18th March and 23rd April 2022 (93% complete by end of March, 7% into April).

IMPORTANT IMPLICATIONS REGARDING OUR SAMPLE

As all respondents were either Considerers or Visitors of Britain, sentiment towards Britain is naturally perceived more warmly than a representative sample of all international travellers.
Footnotes are included where specific analysis is applied to mitigate this positivity impact.

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