MIDAS: Customer Journey

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

kubi kalloo

VISIT BRITAIN

Image: Anna Wiewiora/Caia Images

Customer Journey Deep Dive

Which tools, touchpoints, and resources do tourists use at each stage on the customer journey?

What are the similarities and differences among different markets and different groups of travellers?

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

In this report we deep dive further into the data, highlighting for detailed information at a granular market level for stakeholders in the industry

- We break down the customer journey into three main stages: Inspiration, Deciding, Planning & Booking
- We explore how markets and demographics have different customer journeys and how stakeholders can benefit from this information
- We aim to provide a guideline for practitioners to understand the travellers' touchpoints at each stage of their journey
- We also investigated what are the valued attributes of intermediaries among travellers

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**

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.

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 capture 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.

Key insights

- ***There are three broad categories of travel inspiration:*** Interaction with peers (online and offline), Passive media consumption and Tourism specific media and trade info.
- Short haul travellers are less likely to engage with intermediaries at each stage of the process and it could therefore be harder to influence them with specific content or websites.
- Travellers have ***different priorities at different stages of the customer journey***.
    - Short haul travellers are most price sensitive
    - Households with children are more likely to book packages
    - The Experience Seekers segment engage with more touchpoints
- We don't see big differences in the types of touchpoints travellers engage with. Instead, their level of engagement (sources they engaged with) fluctuates according to the amount of time they are willing and able to invest

Image: VisitBritain/Nemorin

We have identified three stages of the customer journey that tourists follow when planning international travel:

Inspiration

The 1st phase covers the period in which travellers are INSPIRED to think about a holiday type or destination.

Deciding the destination

The 2nd phase covers the process of DECIDING on the destination and starting to PLAN the trip.

Planning & booking

The 3rd phase is how you BOOK the trip and accommodation and activities.

The Role of Intermediaries: Inspiration phase

The 1st phase covers the period in which travellers are INSPIRED to think about a holiday type or destination.

Three pillars of inspiration

We have looked at the sources of information and tools that inspire tourists to consider a break or holiday and have divided these into three groups:

Social Interaction

This includes online and offline communications with friends and family

Recommendations by friends and family
Social media - travel bloggers, influencers or others sharing their experiences
Social media - advice, recommendations or connections with friends & family
None of these

65% report being influenced by at least one of these types of information

Everyday life

Exposure to content in daily live that is not directly related to travelling, such as backdrops in TV programmes and films

Photography, GIFS or videos on websites
Photography, GIFS or videos on social media
Movies or television programmes/series with actors or directors from my home country
International movies or television programmes/series
Books, newspapers or magazines
Music, concerts, tours I hear or read about
Sporting events, festivals or activities I hear or read about
Places my children see or hear about on kids' TV, movies or from friends at school
Podcasts & radio

69% report being influenced by at least one of these types of information

Media and trade info

Paid and targeted content about international tourism

Information, imagery or itineraries on the National Tourist Board Website of that country
Information on the Government website of that country
Advertising campaigns I see online
Advertising campaigns I see on television or at the cinema
Advertising campaigns I see on billboards, posters or outdoor advertising
Imagery, advertising or ideas through an online travel web site/agent
Bargain deals on airfares or tours
Travel websites or web pages found via search engines
Advice from information centres in the destination I'm visiting
Advice from accommodation providers on things to do and see
Travel apps I can download on my mobile phone

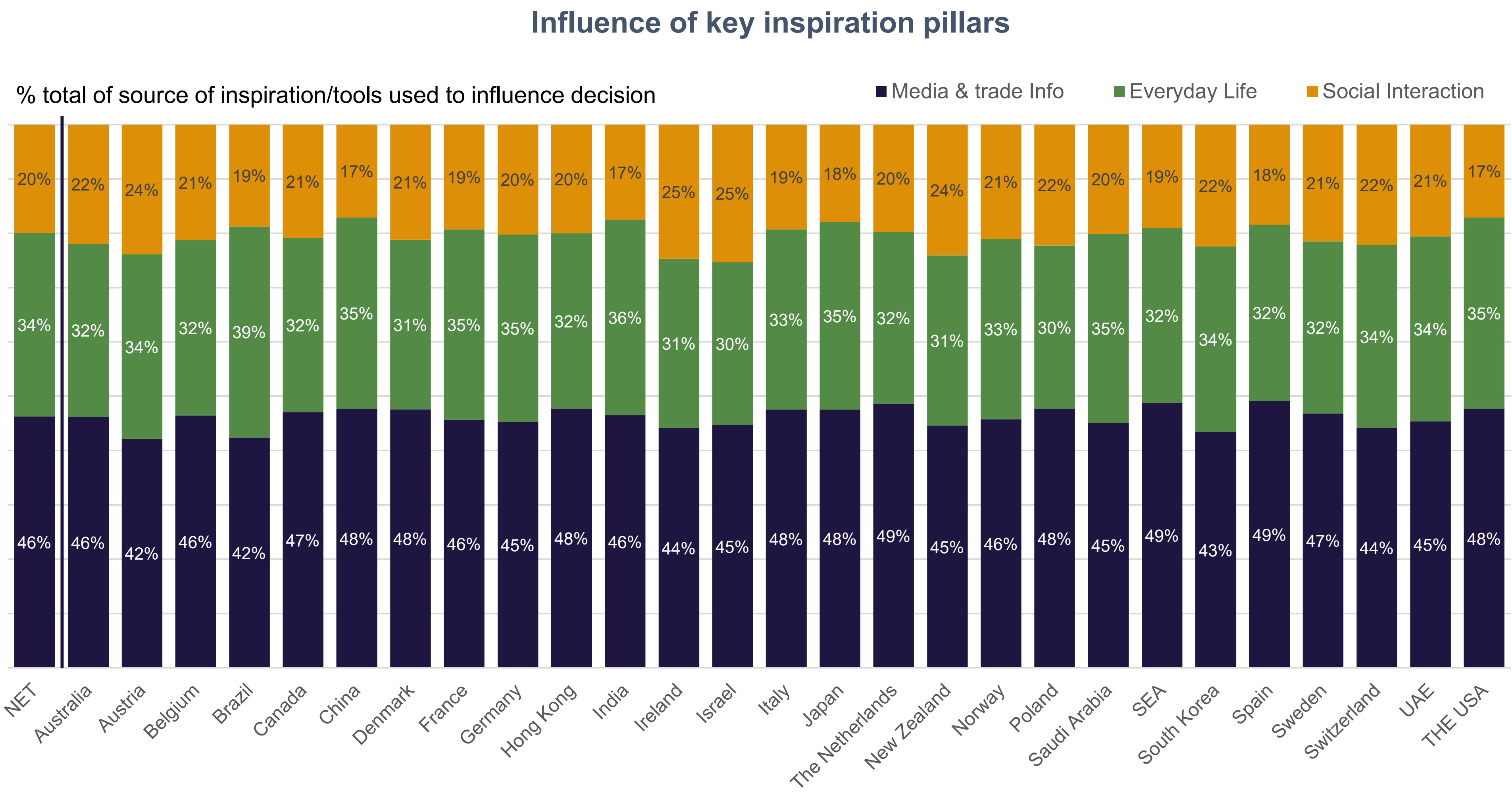
79% report being influenced by at least one of these types of information

Those whose last trip was to Britain report the same mix of influences as total sample

Many people are inspired by more than one of these groups and thus they don't add up to 100%

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, global weighting applied

When it comes to the broad impact of the three pillars of inspiration, there is little variation that exists between markets



Targeted media and trade information is the most effective type of information source to influence and inspire travellers.

Almost half of all inspirational sources used to drive decisions on next holiday destination fall within with Media & tools information category.

1 in 5 use social interactions to inspire

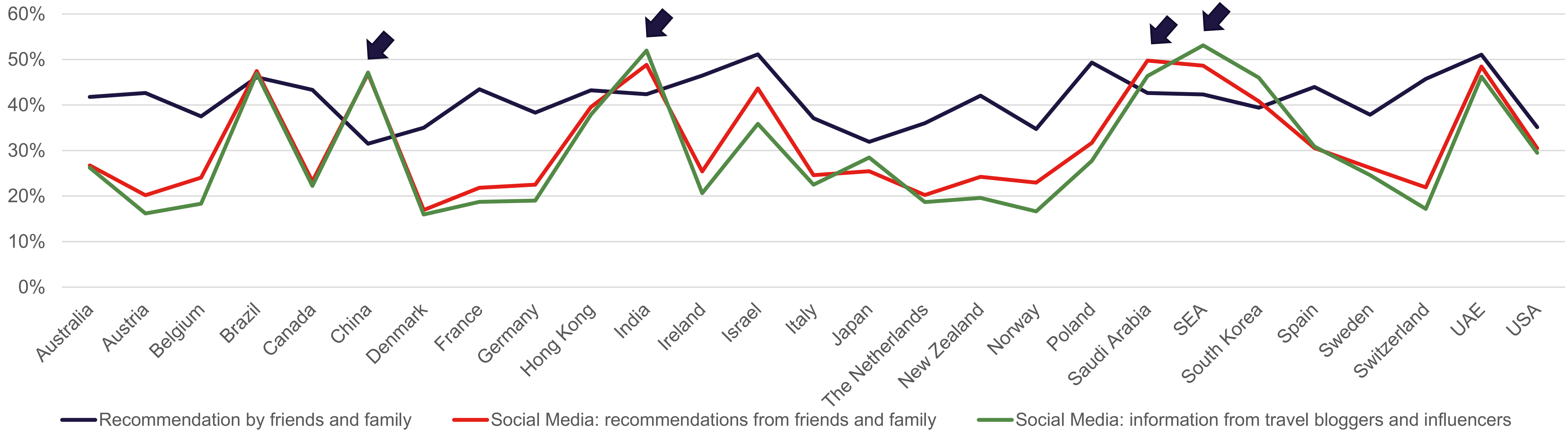
I1. Please select the main places/tools/sources which inspired you to consider the break or holiday. Select all that apply. Base n: 22,840, global weighting applied

Two-thirds of people are inspired to travel by social interactions

Recommendations from friends and family is the strongest driver, this is especially true in mature markets such as Europe, Israel and UAE. Meanwhile, for emerging markets where there might not be as many people travelling, social media is a powerful channel to inspire people to travel abroad, this is particularly true for India, China and South East Asia,.

% Consumers who had at least one social interaction in the early stages of thinking about their trip

NET	AUS	AT	BEL	BR	CAN	CN	DEN	FR	DE	HK	IND	IRE	ISR	IT	JP	NLD	NZ	NOR	POL	SA	SEA	KR	ESP	SWE	CH	UAE	USA
65%	63%	57%	56%	79%	62%	75%	49%	59%	57%	74%	80%	62%	75%	59%	57%	55%	57%	50%	70%	80%	82%	74%	68%	58%	60%	84%	62%



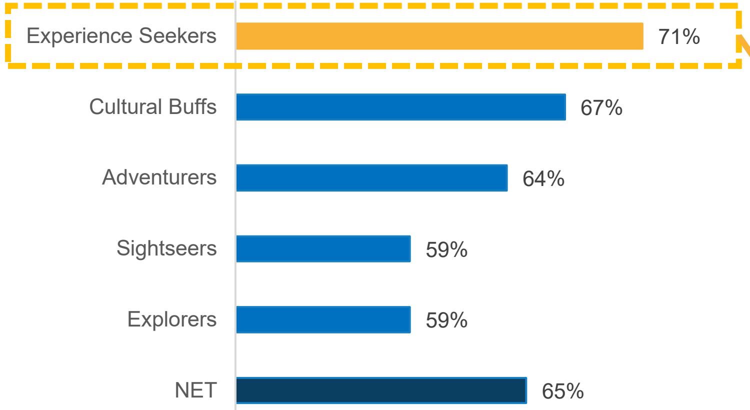
Those whose last trip was to Britain are slightly more likely to report being influenced by an offline recommendation from a friend or family member

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, global weighting applied

Certain groups of travellers are more likely to be influenced by social interactions

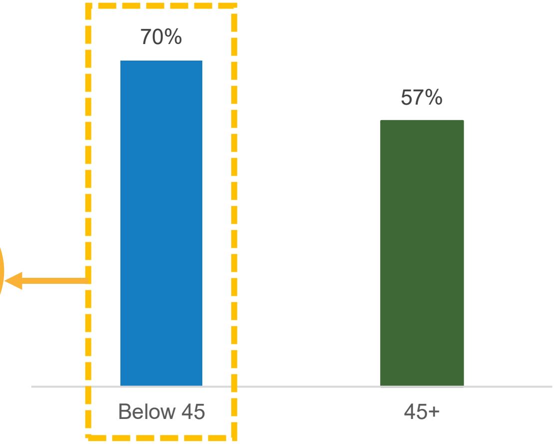
<u>% Consumers who select to be inspired by at least one social interaction</u>

By segment



The most strongly inspired by social interactions

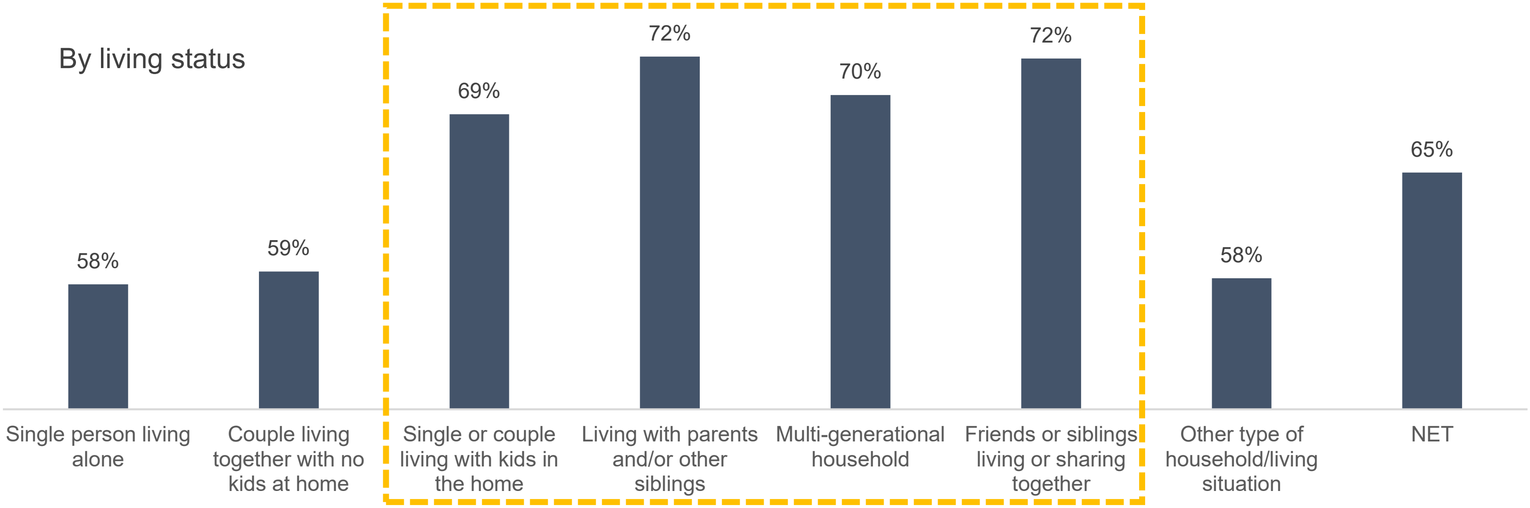
By age (below and above 45)



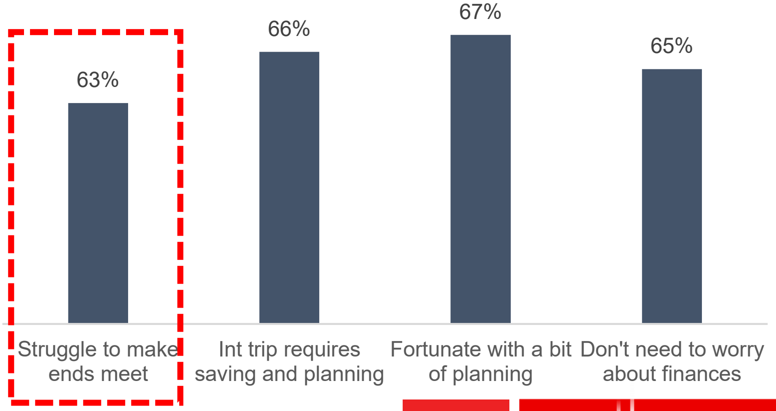
- Those with multiple people within the household are more likely to have their trips influenced by social interactions than those living in smaller household groups
- Younger travellers and Experience Seekers are especially likely to be inspired by social media touchpoints

VisitBritain has segmented international tourists into 5 segments and identified a priority segment – Experience Seekers. Our published reports on our segmentation can be found here: https://www.visitbritain.org/understanding-our-customer-segments

By living status



By affordability



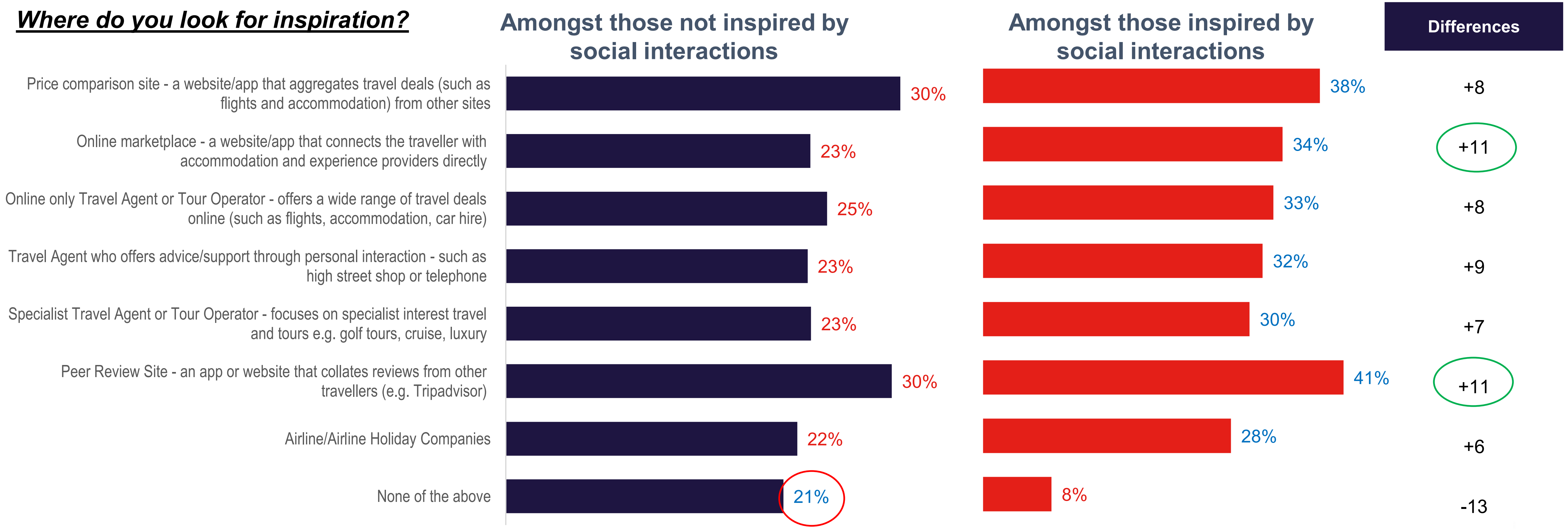
Least likely to be inspired by social interactions

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, global weighting applied

Higher usage of intermediaries during the inspiration phase amongst those that are influenced by online social interactions

2 in 3 international travellers are inspired to travel by social interactions. Those that are inspired by social interactions are also more likely to take part in a more active trip preparation. Peer review sites and online marketplaces see the widest gaps between those inspired by social interactions and those not inspired

Where do you look for inspiration?



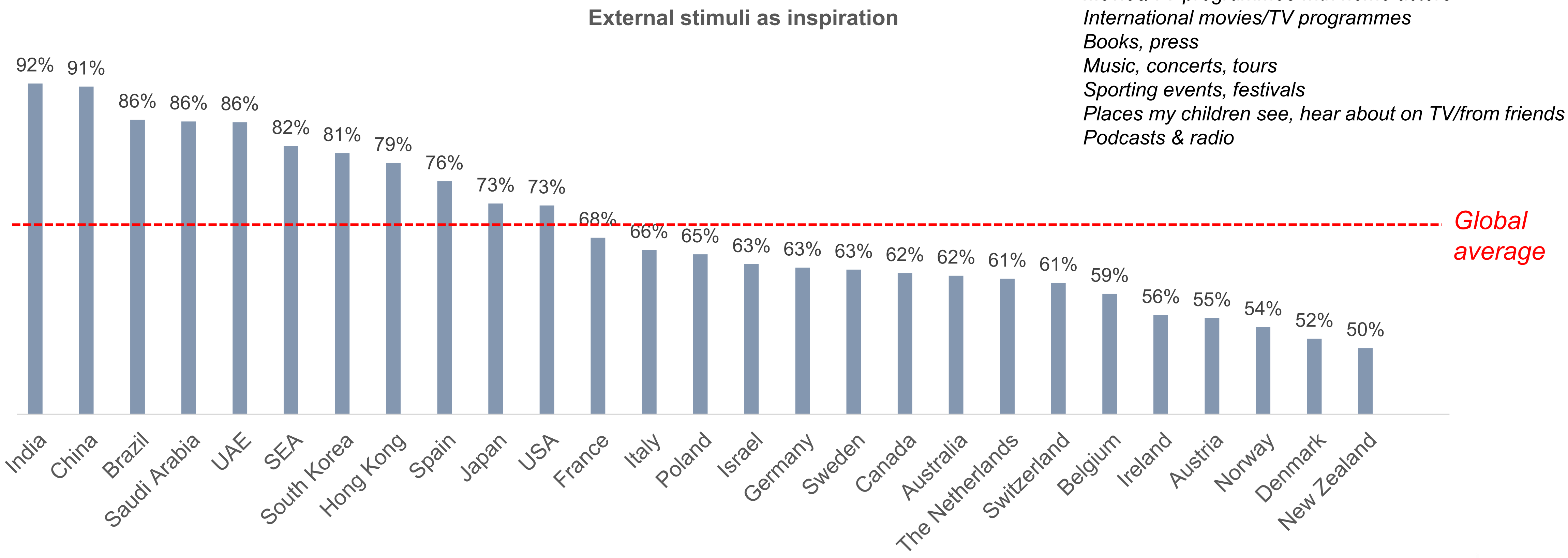
I2 Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages. Inspiration: what do you/ where do you look for your inspiration? Base n=22,840, global weighting applied

Consumers acknowledge being passively exposed to multiple forms of media featuring tourism content in everyday life

Consumers from long haul markets are more likely to be inspired by external everyday stimuli than consumers from short haul markets (with Australia, New Zealand and Canada being the exception)

External stimuli includes:
Photos, GIFS, videos on websites
Photos, GIFS, videos on social media
Movies/TV programmes with home actors
International movies/TV programmes
Books, press
Music, concerts, tours
Sporting events, festivals
Places my children see, hear about on TV/from friends
Podcasts & radio

% Consumers who selected at least one everyday external stimulus as inspiration

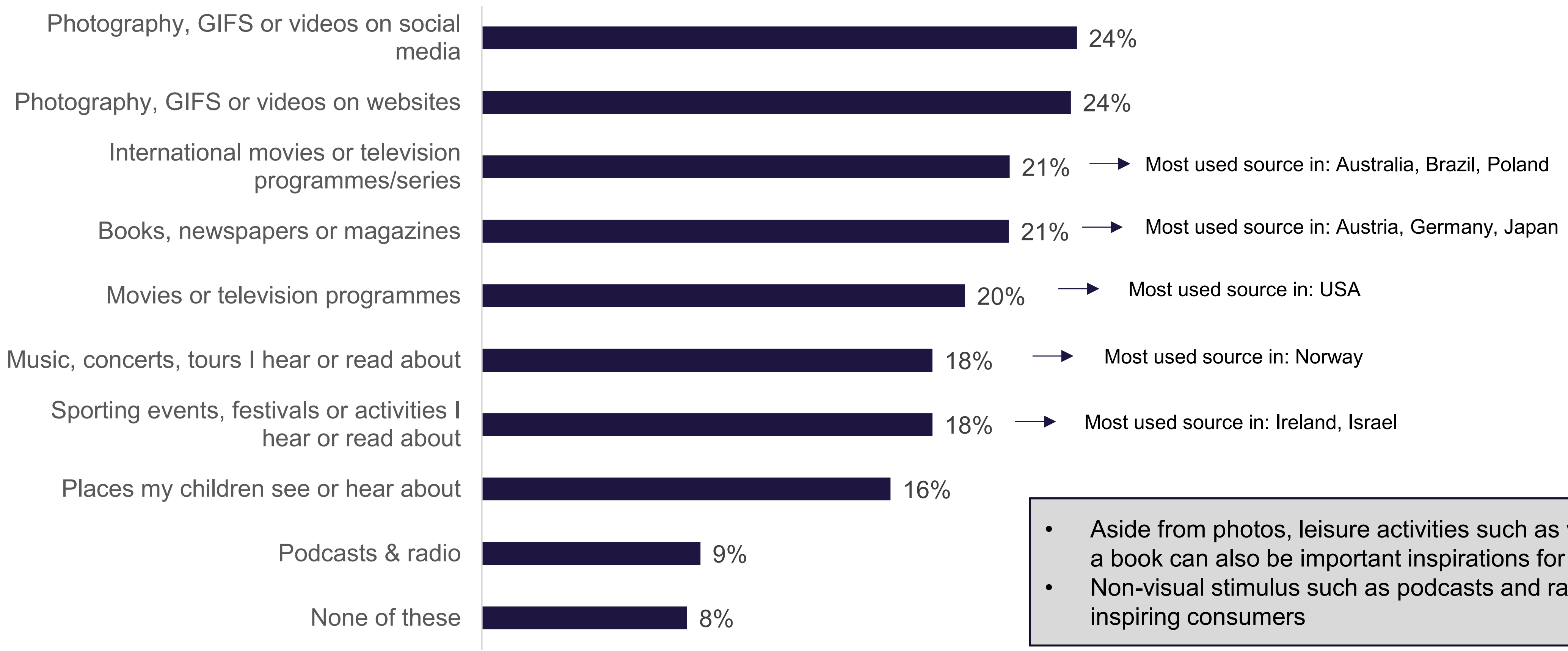


I1. Please select the main places/tools/sources which inspired you to consider the break or holiday. Select all that apply. Base n= 22,840, global weighting applied

Within the media consumers are exposed to in day to day life, they are most likely to remember visual media such as photos and videos

% external stimulus selected as inspiration

Everyday life inspirations



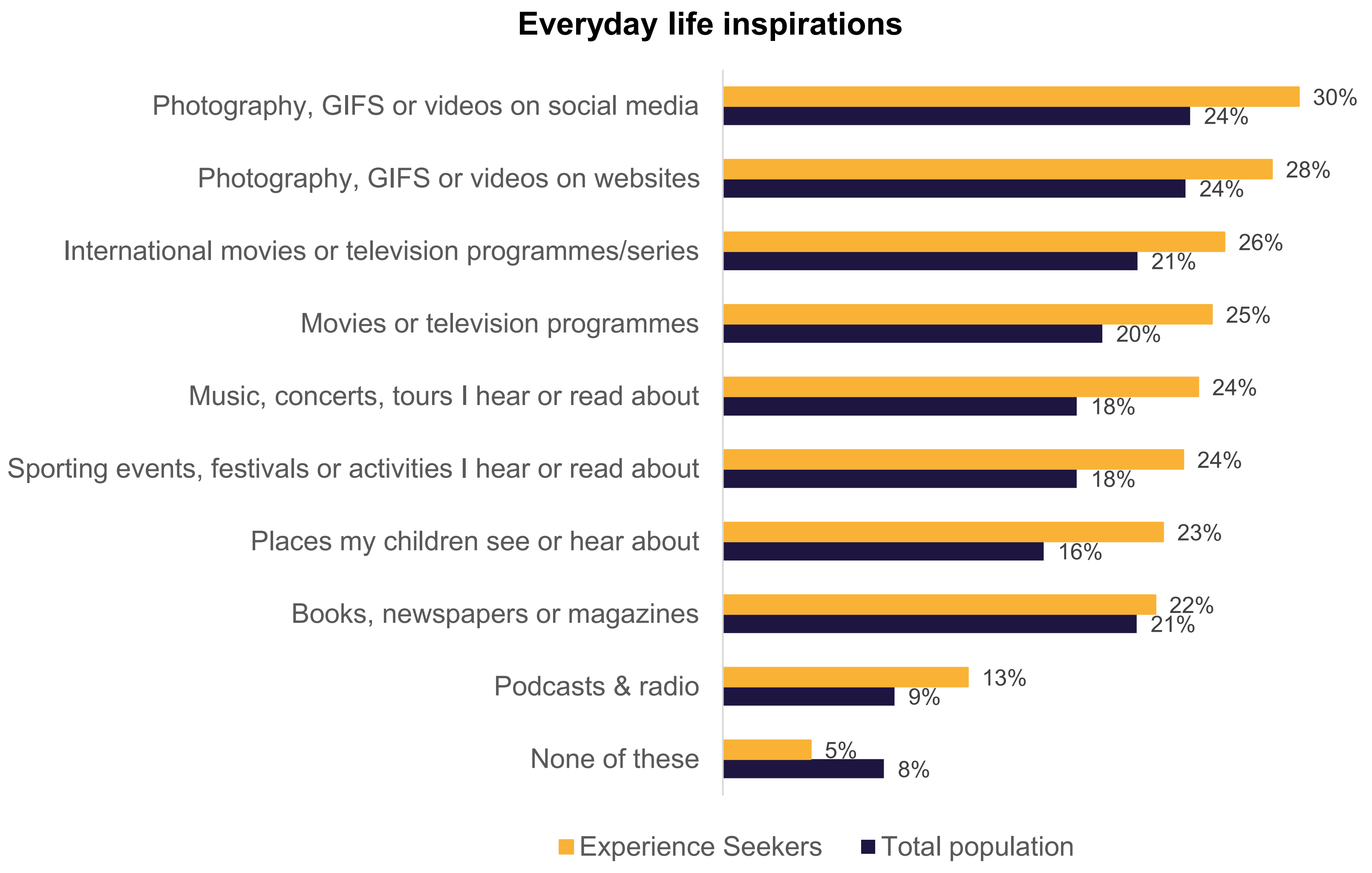
- Aside from photos, leisure activities such as watching a movie or reading a book can also be important inspirations for consumers
- Non-visual stimulus such as podcasts and radios are less effective in inspiring consumers

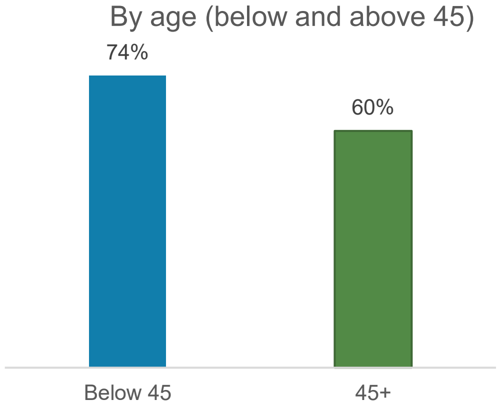
Those whose last trip was to Britain report the same mix of influences as total sample

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, global weighting applied

Experience Seekers are more responsive to tourism content they passively encounter than other segments, as are younger consumers

% external stimulus selected as inspiration





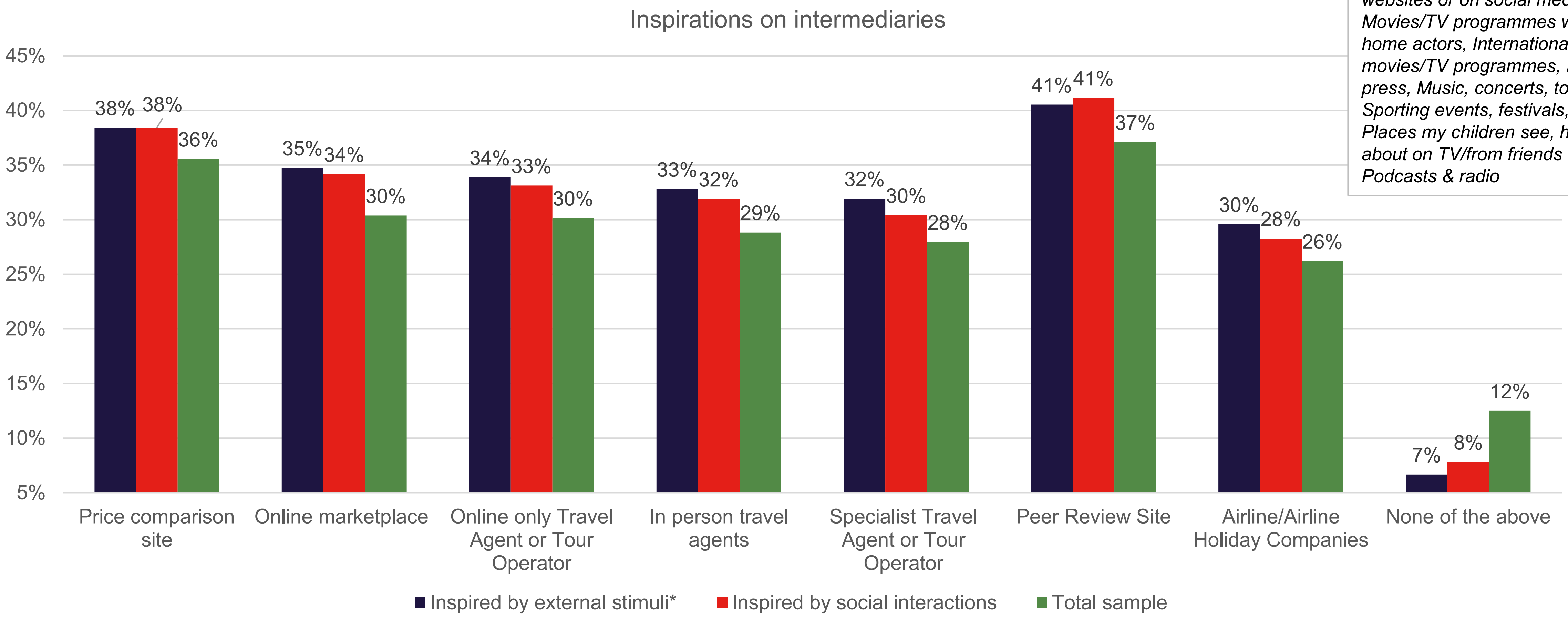
Under 45 year-olds are more inspired by all external stimulus with exception of 'books, newspapers & magazines' which is the strongest external source for 45+ year olds

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, global weighting applied

There is a clear link between being passively exposed to tourism content and going on to conduct more active research

Respondents who are exposed to tourism content in everyday life are more likely to continue their journey and actively seek inspirations from travel intermediaries. Therefore, they over-index on all intermediaries in the inspiration stage

Where do you look for your inspiration?

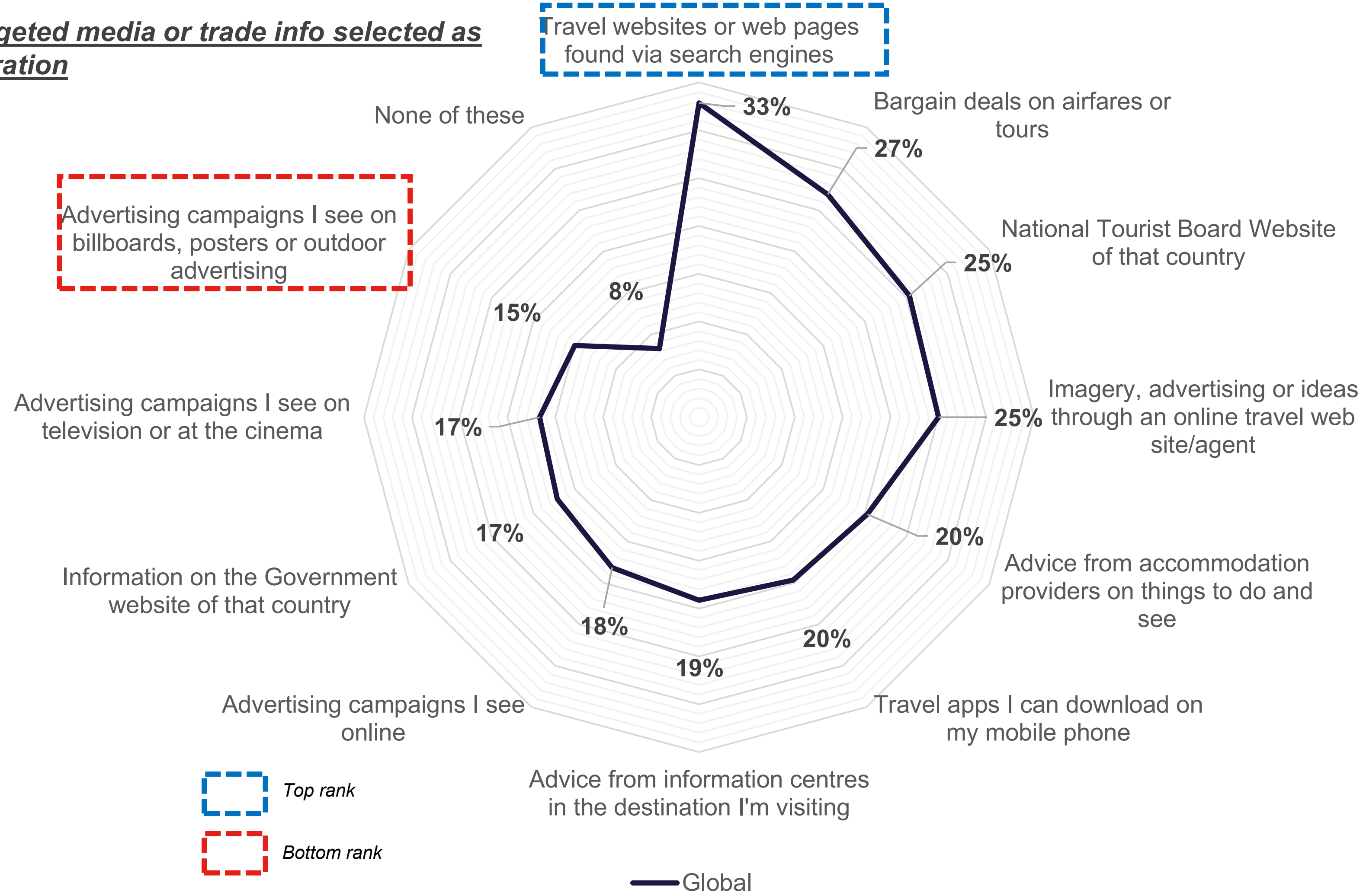


External stimuli include: *Photos, GIFS, videos on websites or on social media, Movies/TV programmes with home actors, International movies/TV programmes, Books, press, Music, concerts, tours, Sporting events, festivals, Places my children see, hear about on TV/from friends or Podcasts & radio*

I2 Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages. Inspiration: what do you/where do you look for your inspiration? Base n=22,840, global weighting applied.

Within targeted media or trade info, travel websites are the most likely to inspire travel, followed by special offers, NTB* websites and OTAs

% targeted media or trade info selected as inspiration



Long haul travellers are willing to ***invest more time*** on targeted media.

Short haul markets, due to the ***proximity and familiarity*** of Britain, are less likely to be inspired by targeted media in general. However, ***short haul consumers*** are more price sensitive and are often aware of and ***inspired by bargain deals on airfares or tours.***

Objectivity is still a huge inspiration driver, particularly in Long haul markets, with consumers using travel websites (that are not selling something) over websites of single operators

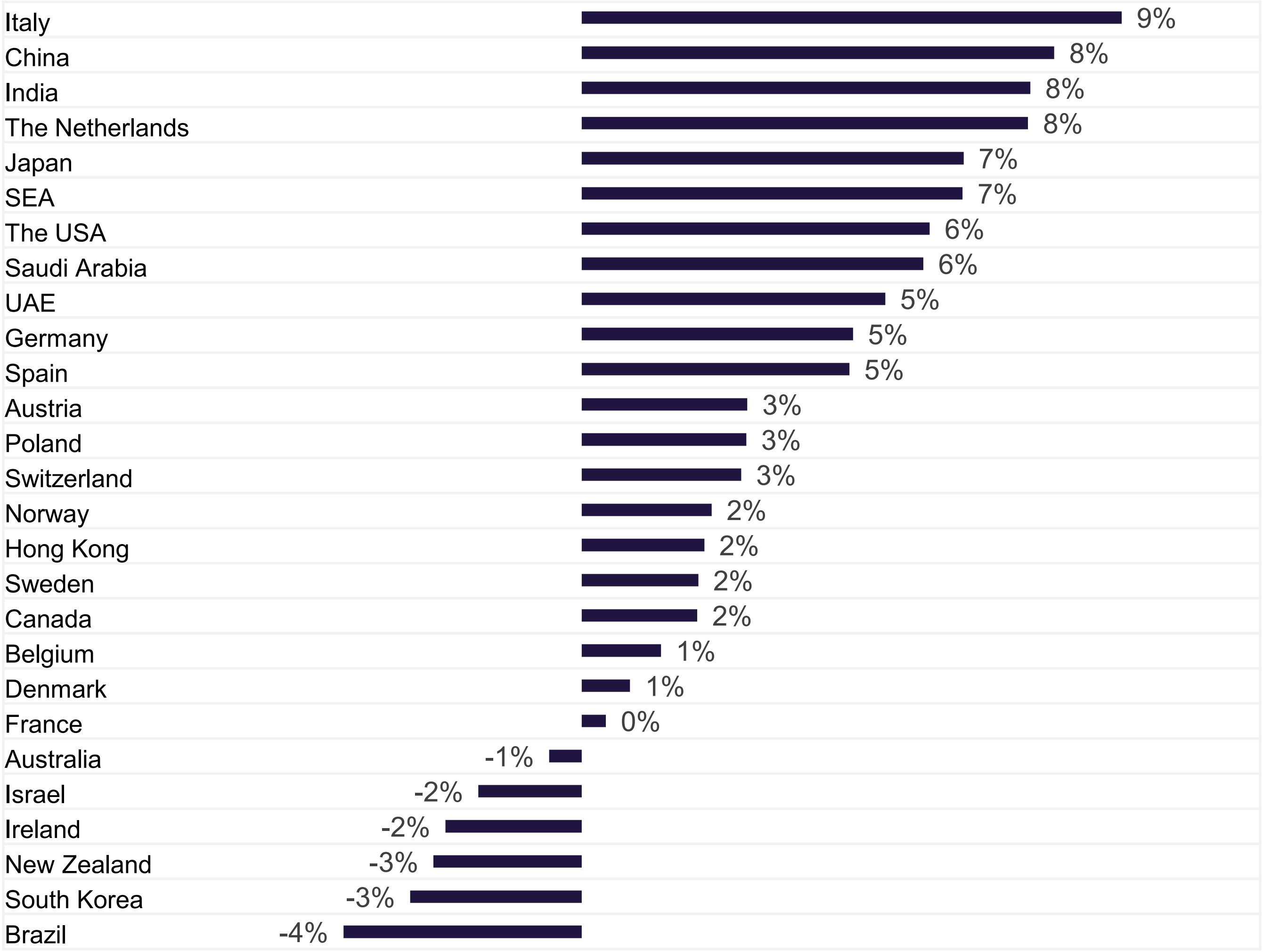
Those whose last trip was to Britain are slightly more likely to report being influenced by advice from information centres and information from NTB websites

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, global weighting applied. *National Tourist Board

MEDIA & TRADE INFO

The prevalence of usage of NTB* websites in relation to other sources varies considerably according to market. We also see increased usage according to health condition, family composition and holiday affordability

Usage of NTB* websites relative to usage of other resources



Those looking **for 'High energy trips' and 'Bespoke, unique trips'** are *more likely to use NTB* websites*, those **visiting friends and relatives** and **those 'spoiling themselves**' are *less likely to do so.*

Those with certain **health conditions** are *more likely to use NTB* websites*: Dementia, physical or mobility impairment and hearing Impairment

Those **who find holidays most affordable** *are more likely to use NTB* websites*

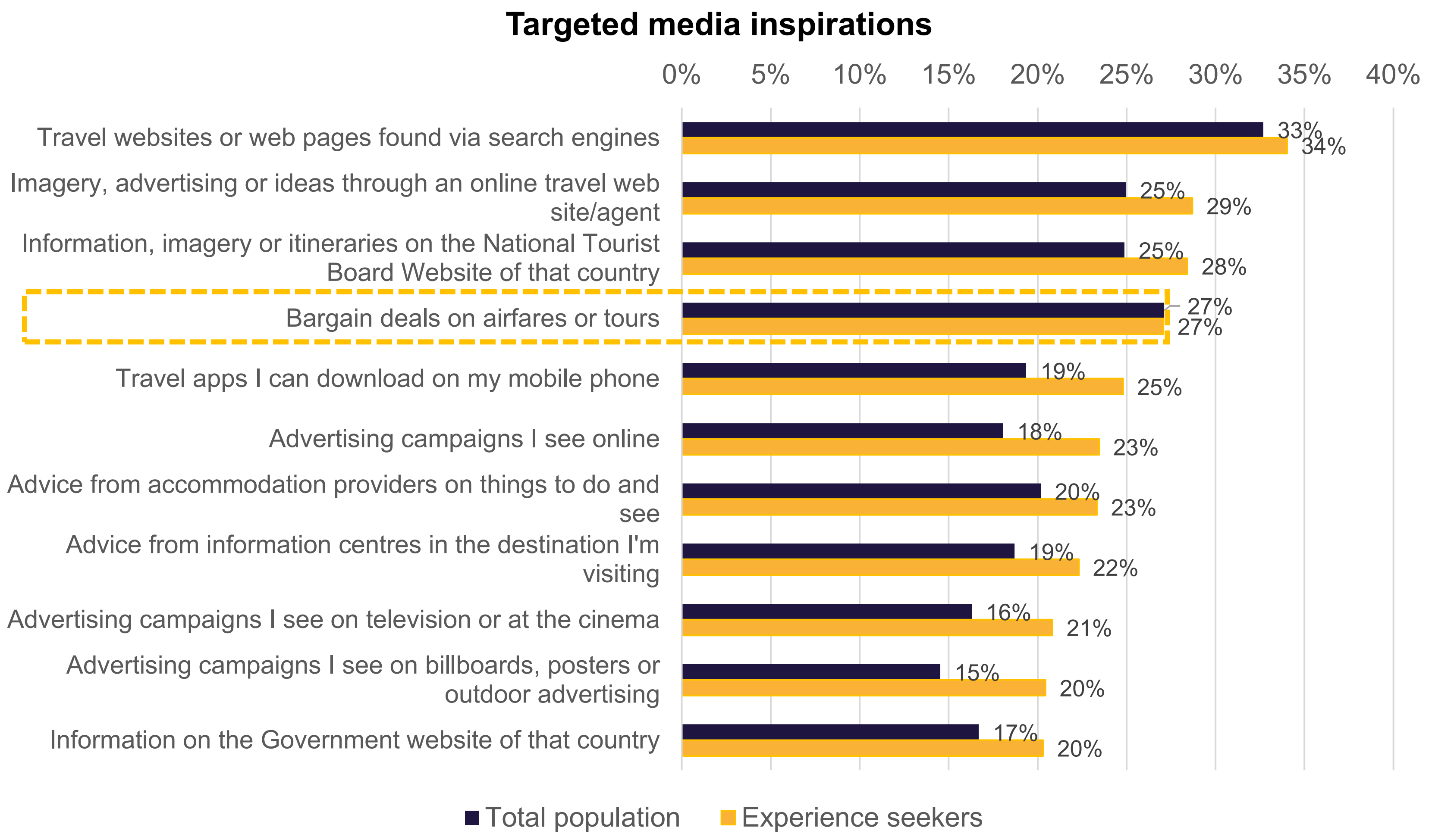
Multi-generational households and those with **kids at home** *are more likely to use NTB* websites*

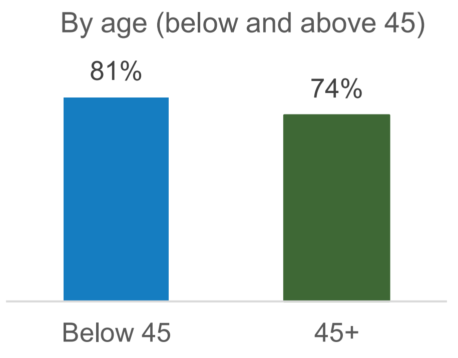
I1. Please select the main places/tools/sources which inspired you to consider the break or holiday. Select all that apply. Base n: 22,840, global weighting applied *National Tourist Board

kubi kalloo VISIT BRITAIN

Experience Seekers are more responsive to targeted media or trade info except for special offers

% targeted media selected as inspiration





Under 45 year-olds are more inspired by all ad campaigns and downloadable travel apps. **Over 45 year-olds** are more inspired by travel websites

There are no real differences by affordability groups with the exception that the more affluent are less inspired by bargain deals and more inspired by travel websites and NTB* websites

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, global weighting applied. *National Tourist Board

Three main sources of inspiration play a significant role in the customer journey for international travellers.

- Interaction with peers both online and offline
- Passive media consumption
- Tourism specific content

Travellers with children, those living with parents or with friends and siblings, or living in multigenerational households are more likely to be inspired by interactions with peers

Those who have been exposed to greater levels of unsolicited peer influence are more likely to then conduct active research

Markets that are less familiar with Britain are more strongly inspired by passive media consumption, such as backdrops in TV programs, sporting events or newspapers

Tourism specific content is most effective in influencing **long haul travellers and Experience Seekers**

Short haul travellers are more likely to be inspired by price-based information such as special offers.

In Summary

There are three pillars in the inspiration stage: Interaction with peers, passive media consumption and tourism specific content. Though different sources of information are more influential for some travellers than others, peer generated content, such as review sites are generally trusted more than individual companies.

Deciding the destination

The 2nd phase covers the process of DECIDING and starting to PLAN the trip.

The deciding stage is a complicated process with different demographics and segments acting very differently

Market differences

Demographic differences

Segment differences

Long haul travellers are more involved in the deciding stage and are more likely to use intermediaries to help them make decisions

Long haul travellers are likely to spend ***more time and effort*** deciding how they would travel abroad than short haul travellers. The costs (both time and monetary) are higher for long haul travellers, and they use as many tools as possible to them before deciding.

What do you use to help you decide? (Long haul travellers)

Most popular → Least popular

	Column %	AUS	BRA	CAN	CN	HK	IND	JP	NZ	ISR	SAU	UAE	SEA	SK	USA	LH NET	Global
DECIDING	Price comparison site	44%	44%	45%	44%	50%	43%	38%	45%	44%	48%	48%	57%	42%	42%	**45%**	**42%**
	Peer Review Site	29%	39%	33%	41%	35%	35%	30%	29%	39%	39%	38%	45%	37%	33%	**36%**	**32%**
	Airline/Airline Holiday Companies	34%	39%	36%	43%	42%	28%	36%	39%	39%	48%	40%	42%	36%	33%	**38%**	**32%**
	Online marketplace	28%	31%	27%	40%	36%	37%	29%	28%	39%	37%	40%	41%	29%	30%	**34%**	**29%**
	Online only Travel Agent/Tour Operator	30%	35%	31%	42%	41%	43%	37%	28%	34%	39%	40%	43%	37%	32%	**37%**	**31%**
	Travel Agent - shop or phone	32%	37%	29%	43%	31%	36%	33%	32%	33%	43%	37%	39%	28%	31%	**35%**	**28%**
	Specialist Travel Agent/Tour Operator	26%	32%	27%	42%	34%	35%	28%	22%	30%	38%	32%	39%	36%	29%	**32%**	**26%**

Those whose last trip was to Britain are more likely to report using peer review sites

- **Price comparison sites** are the most important intermediary to help long haul consumers to decide on a destination.
- Long haul travellers like to use **service providers such as airline or airline holiday companies** in the deciding stage
- Overall, long haul travellers are more engaged with all resources in the deciding stage

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 Weighted.
Numbers are statistically higher than the average @ 95% confidence

Short haul travellers interact with intermediaries differently, under-indexing on all intermediaries

Short haul travellers might spend less time deciding where they will travel compared with long haul travellers. However, it should also note that European travellers are more likely to under-index on all their responses.

What do you use to help you decide? (Long haul travellers)

Most popular

Least popular

	Column %	AUT	BEL	DEN	FRA	DE	IRE	ITA	NED	NOR	POL	SPA	SWE	CH	SH NET	Global
DECIDING	Price comparison site	42%	37%	33%	37%	35%	47%	43%	39%	39%	46%	42%	40%	37%	**40%**	**42%**
	Peer Review Site	35%	29%	17%	21%	29%	32%	30%	30%	24%	33%	34%	26%	32%	**29%**	**32%**
	Airline/Airline Holiday Companies	23%	24%	24%	21%	20%	30%	26%	24%	32%	25%	27%	30%	28%	**26%**	**32%**
	Online marketplace	25%	22%	20%	22%	24%	28%	21%	21%	19%	26%	31%	22%	26%	**24%**	**29%**
	Online only Travel Agent/Tour Operator	33%	24%	27%	19%	27%	20%	22%	19%	26%	26%	26%	23%	28%	**25%**	**31%**
	Travel Agent - shop or phone	23%	26%	20%	19%	22%	20%	19%	19%	14%	31%	25%	22%	22%	**22%**	**28%**
	Specialist Travel Agent/Tour Operator	16%	21%	17%	18%	15%	18%	21%	15%	16%	26%	22%	17%	20%	**19%**	**26%**

Those whose last trip was to Britain are more likely to report using peer review sites

- Ireland travellers are the most engaged with **price comparison sites** within short haul travellers in the deciding stage
- Most **short haul travellers** (2 out of 3) do not use any form of travel agent in the deciding phase

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 Weighted.
Numbers are statistically higher than the average @ 95% confidence

Price comparison sites are the dominant tool for deciding on travel across most long-haul markets.

LONG HAUL: What do you use to help you decide?

	Proportions that use price comparison sites	Price comparison most popular tool for deciding	How much lead over next most popular tool? (% pt)	What is next most popular tool?
Australia	44%	Yes	+10	Airline holiday companies
Brazil	44%	Yes	+5	Peer review site
Canada	45%	Yes	+9	Airline holiday companies
China	44%	Yes	+1	All tools at very similar levels in China – general high usage of all
Hong Kong	50%	Yes	+8	Airline holiday companies
India	43%	Joint first with Online only Travel Agent	0	Online marketplace
Japan	38%	Yes	+8	Online only Travel Agent
New Zealand	45%	Yes	+6	Airline holiday companies
Saudi Arabia	48%	Joint first with Airline holiday companies	0	Travel agent with personal interaction
SEA	57%	Yes	+12	Peer review site
South Korea	42%	Yes	+5	Peer review site & online travel agent
UAE	48%	Yes	+8	All tools at very similar levels in UAE – general high usage of all
USA	42%	Yes	+9	All other tools at similar levels

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 Weighted.
Numbers are statistically higher than the average @ 95% confidence

Price comparison sites are the dominant tool for short-haul markets market with Peer review sites a popular secondary tool

SHORT HAUL: What do you use to help you decide?

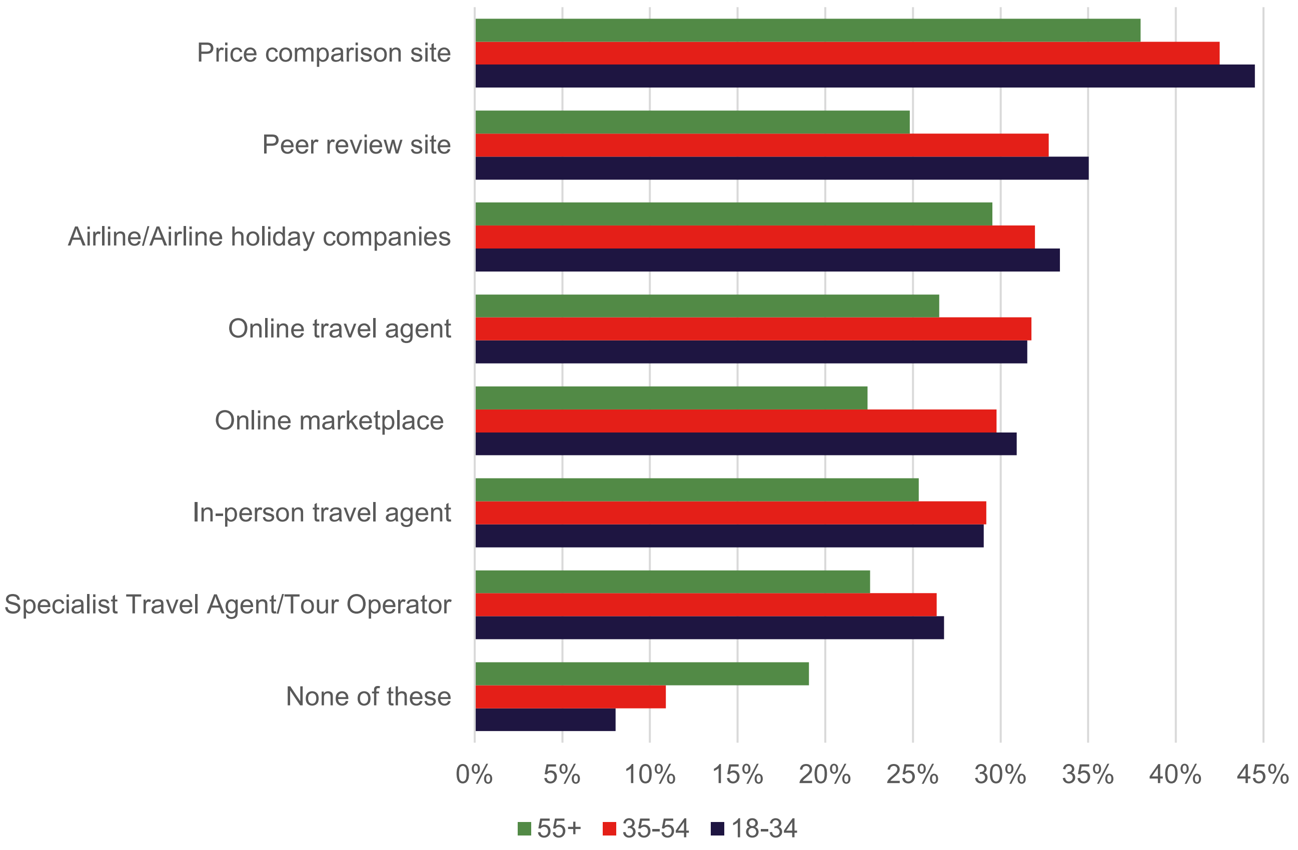
	Proportions that use price comparison sites	Price comparison most popular tool for deciding	How much lead over next most popular tool? (% pt)	What is next most popular tool?
Austria	42%	Yes	+7	Peer review site
Belgium	37%	Yes	+8	Peer review site
Denmark	33%	Yes	+6	Online only Travel Agent
France	37%	Yes	+15	Online marketplace
Germany	35%	Yes	+6	Peer review site
Ireland	47%	Yes	+15	Peer review site
Italy	43%	Yes	+13	Peer review site
Netherlands	39%	Yes	+9	Peer review site
Norway	39%	Yes	+7	Airline holiday companies
Poland	46%	Yes	+13	Peer review site
Israel	44%	Yes	+5	All tools at very similar levels in Israel – general high usage of all
Spain	42%	Yes	+8	Peer review site
Sweden	40%	Yes	+10	Airline holiday companies
Switzerland	37%	Yes	+5	Peer review site

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 Weighted.
Numbers are statistically higher than the average @ 95% confidence

The level of usage of intermediaries for finalising travel reduces with age

18 to 54 year olds show similar patterns with highest usage for price comparison sites and peer review sites. Meanwhile although 55+ yr olds also use price comparison sites the most for deciding, they also use airline holiday companies and online travel agents more than peer review sites. Younger consumers are value hunting and will explore as much information as possible; older consumers are less reliant on online options. There was also likely to be an element of uncertainty as well coming out of the pandemic, so people needed to compare.

What do you use to help you decide? By age group



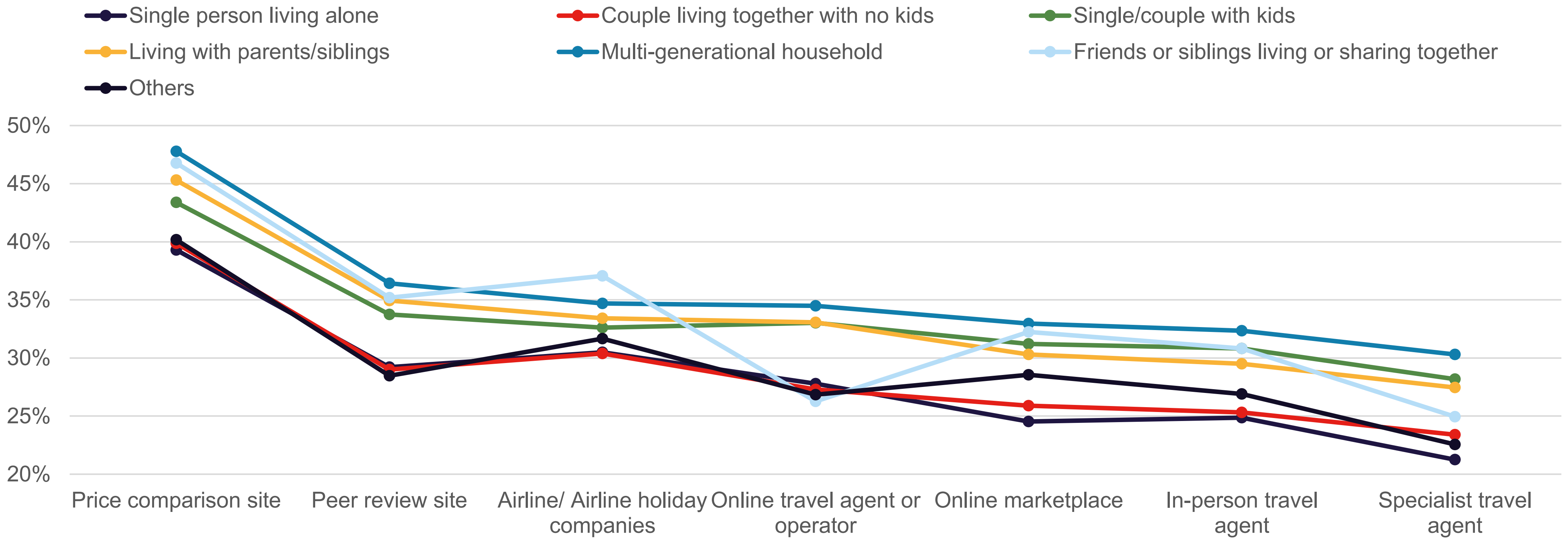
- *Younger consumers likely to be more* ***tech-savvy*** *and able to navigate through different channels. They also tend to be more* ***price sensitive***, *and spend more time going through different resources before making a decision.*
- *Young consumers still rely on* ***travel agents***. *More than 1 in 4 younger consumers will reach out to travel agents to help them make decisions.*

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 Weighted. Numbers are statistically higher than the average @ 95% confidence

Regardless of household composition, similar travel intermediaries are used

The overall trend of highest usage for price comparison sites and peer review sites is similar for all household structures. The exception to this is airline holiday companies playing more of a role for friends living together, who are less likely to use online travel agents. Multigenerational households show the highest usage generally across all intermediaries, potentially as they are likely to have to accommodate different needs within the household

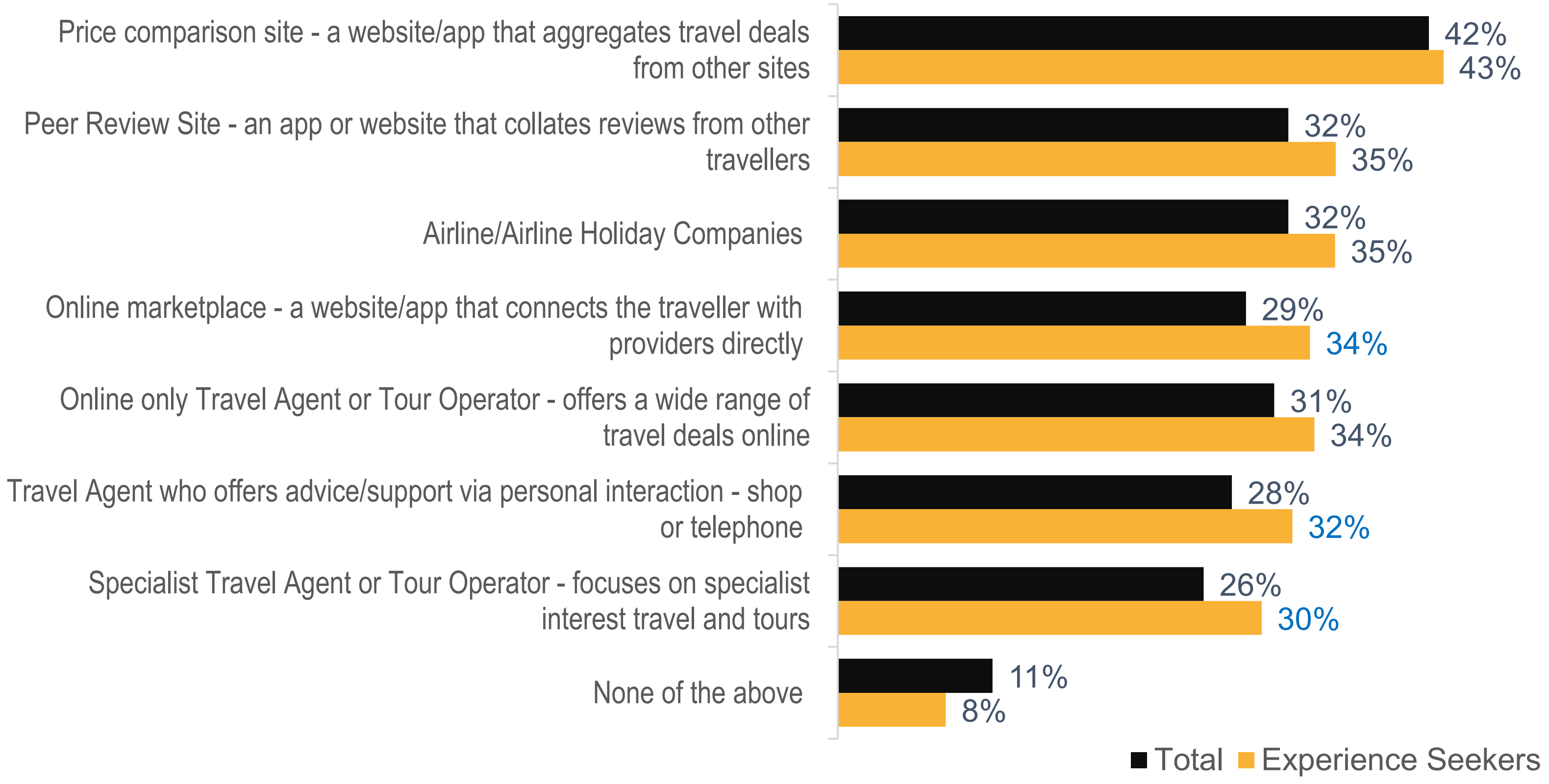
What do you use to help you decide? By living status



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 Weighted. Numbers are statistically higher than the average @ 95% confidence. Where non figures are shown, this is because there are no significant differences versus total

We see a similar pattern in the Deciding phase for Experience Seekers – with heavier usage of resources generally but no specific skew vs the total sample

What do you use to help you decide? By segment



66% of Experience Seekers use multiple resources in the Deciding phase, compared with 59% overall.

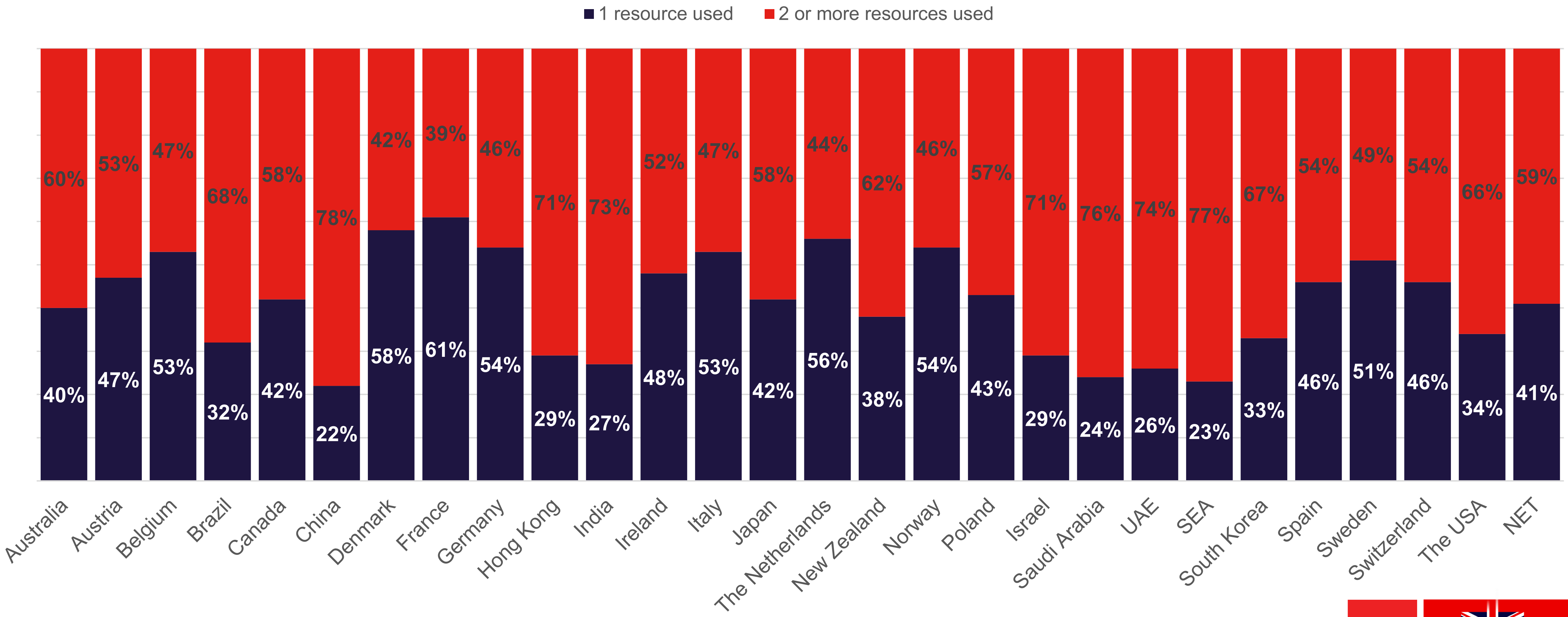
Experience Seekers over index across most resources, the most marked is for online marketplace, in-person travel agents, and specialist travel agents.

NB: Respondents were shown market specific examples to help them understand the categories

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 Experience Seekers N=6, 677 Weighted.
Blue numbers are significantly higher than comparative base @ 95% confidence

Overall, Long haul travellers use more resources to decide their next leisure trip. This is especially true for those from Southeast Asia, UAE, India and Hong Kong

What do you use to help you decide? By market



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 Experience Seekers N=6, 677 Weighted.
Blue numbers are significantly higher than comparative base @ 95% confidence

Long haul travellers engage with more information sources in the deciding stage (than short haul travellers) especially travellers from Southeast Asia.

More than half of the respondents (59%) used **more than one intermediary** in the deciding the destination stage.

Price comparison sites are the most used intermediaries in the deciding stage. Although India and Saudi Arabia are comparatively more likely to rely on **online travel agents**

Young consumers are more involved in the deciding stage than older consumers, typically more **price sensitive** and comfortable navigating different online and offline resources

While all segments act similarly, **Experience Seekers are more likely to use multiple resources in the deciding phase**

In Summary

Typically more price sensitive, short haul travellers engage less in the earlier journey stages than long haul travellers giving industry stakeholders less opportunity to influence them. Passive inspiration takes on greater importance for them.

Most groups use the same *types* of intermediaries, it is their *level* of engagement with each that fluctuates. More broadly, involvement in the deciding stage decreases with age.

Planning & booking

The 3rd phase is how you BOOK the trip and accommodation/activities.

Understanding travel planning and booking behaviours through individual differences and according to holiday type

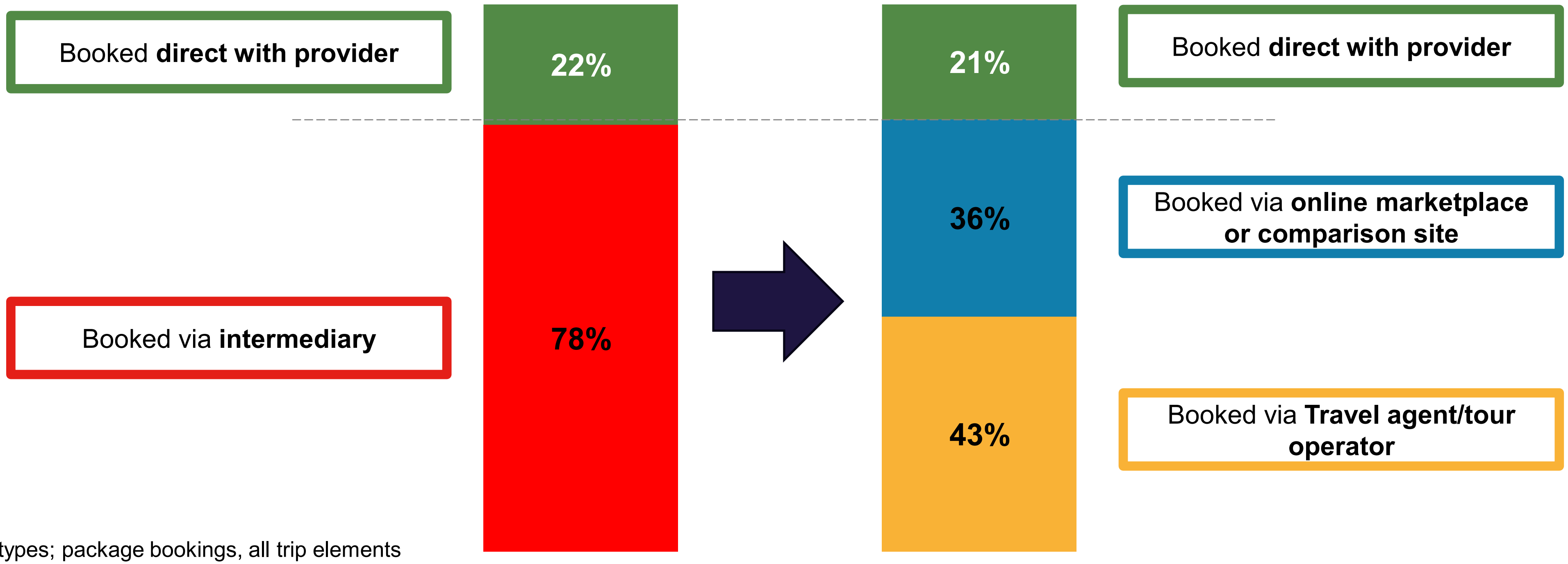
Consumers behave differently in their planning and booking behaviours, according to ***market and social economic backgrounds***

Consumers show differing planning and booking behaviours according to the ***type of holiday sought***

8 in 10 trips to Britain were booked via an intermediary, with over a third via online marketplace or comparison sites

Intermediaries play a significant part in the 'booking' phase of the customer journey with Britain visitors twice as likely to book their trip to Britain via travel agents/tour operators than direct. Online marketplaces and comparison sites also have a prominent role to play.

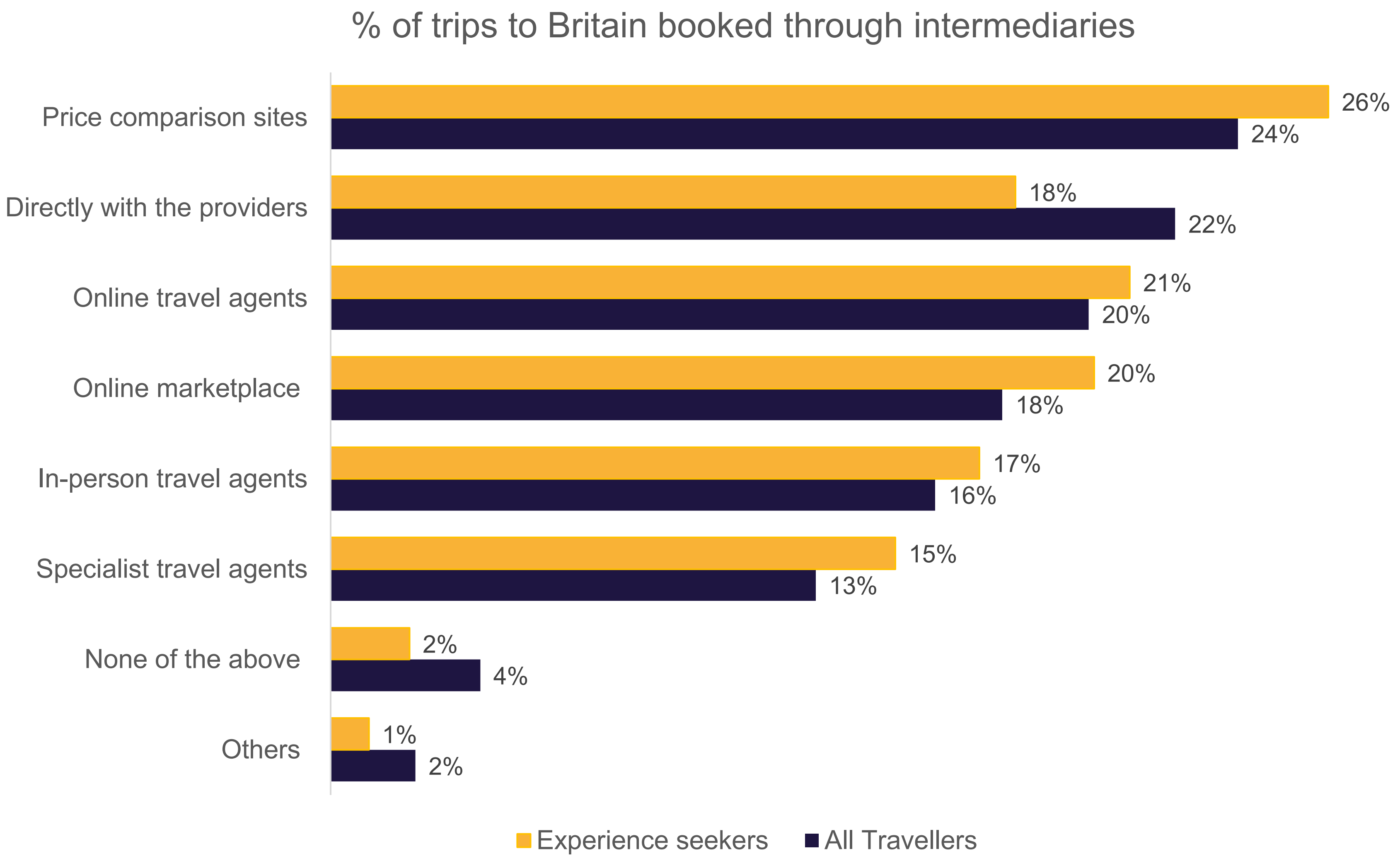
Booking* a trip to Britain via booking channel



*includes all booking types; package bookings, all trip elements booked separately, some but not all elements booked together

I3: And thinking about this break or holiday to Britain, which of the following is true when it came to booking the elements of your trip. I4: And which of these best captures how you booked your [package] trip?, I5. And which of these best captures how you booked your travel to and from GB? Base Weighted, GB Visitors, n= 8,042. NB: Other and 'None of the above' excluded from analysis

Travellers are most likely to use price comparison sites to book their trip to Britain



Travellers like to book their travels through ***price comparison sites or directly with providers***

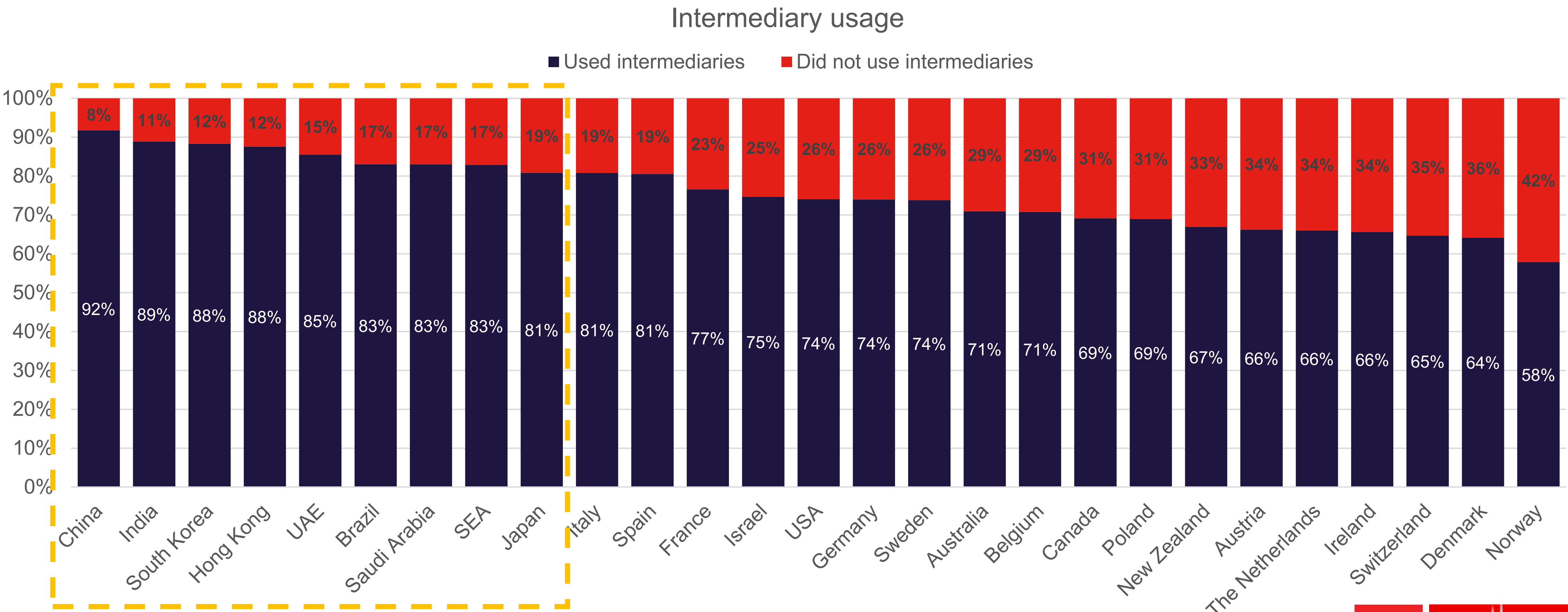
Travellers are least likely to use ***specialist travel agent*** as specialist travel agents provide specific travel experiences

Experience seekers are disproportionally more likely to use intermediaries

I4: And which of these best captures how you booked your [package] trip?
I5. And which of these best captures how you booked your travel to and from [DESTINATION]?
I6. And which of these best captures how you booked your accommodation in [DESTINATION]?
Base n=22,840; global weighting applied. Countries unweighted

Long haul travellers over-index on the usage of intermediaries at the booking stage

Long haul travellers over-index on intermediaries. It might be more difficult for travellers from long-haul markets to book different elements and many opt for using intermediaries at the booking stage.



I4: And which of these best captures how you booked your [package] trip?
I5. And which of these best captures how you booked your travel to and from [DESTINATION]?
I6. And which of these best captures how you booked your accommodation in [DESTINATION]?
Base n=22,840; global weighting applied. Countries unweighted

kubi kalloo VISIT BRITAIN

Slightly fewer intermediaries are used at the planning stage, price comparison sites are used by one-in-three

Consumers use price comparison sites at all stages of the customer journey, most notably the deciding and booking stages.

Global use	Inspiration	Deciding	Planning and Booking	Any Stage
Price Comparison Site	36%	42%	36%	72%
Online Marketplace	30%	29%	28%	60%
Online only Travel Agent or Tour Operator	30%	31%	30%	61%
Travel Agent via Personal Interaction	29%	28%	28%	58%
Specialist Travel Agent or Tour Operator	28%	26%	26%	56%
Peer Review Site	37%	32%	28%	65%
Airline/Airline Holiday Companies	26%	32%	31%	62%
None of the Above	12%	11%	11%	20%

Those whose last trip was to Britain are slightly more likely to report using travel agents and specialist travel agents

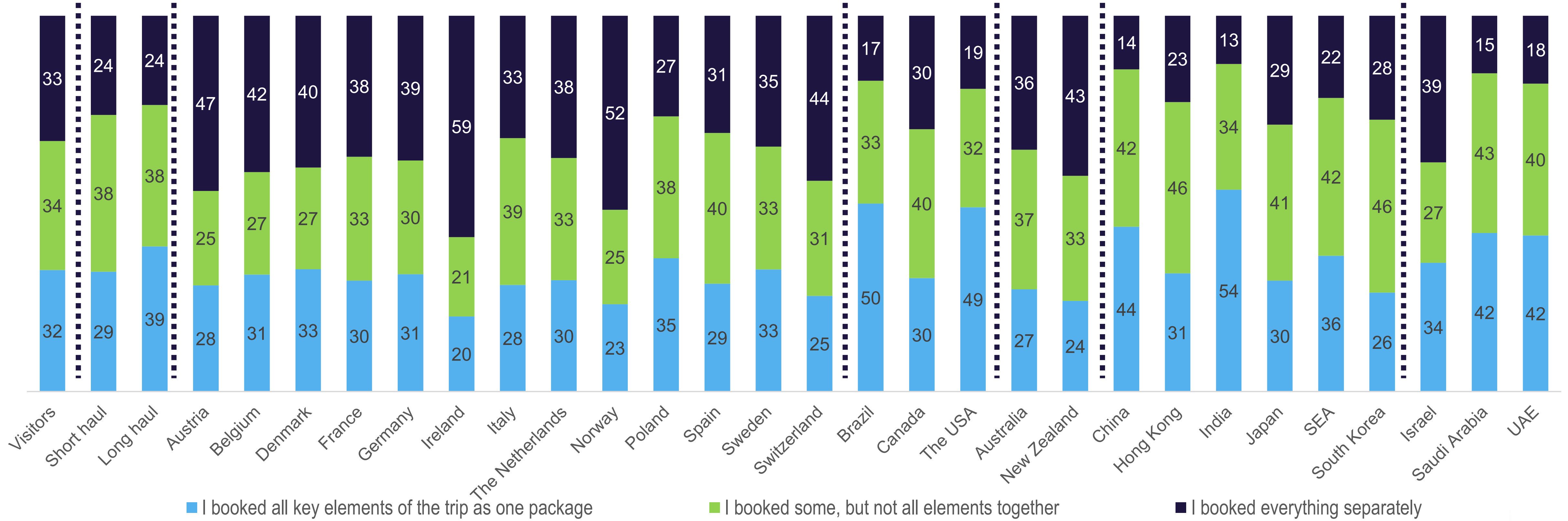
I2: Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages? Multiple Response
Base: Total Global N=22,840 Weighted.
Numbers are statistically higher than the average @ 95% confidence

One-in-three visitors to Britain report booking a package. Short-haul markets are more likely to book trip elements separately

Tourists from the Americas and India are disproportionately likely to book as a package, with India and the Middle East also mirroring this tendency.

Booked elements	One package	Some together	All separately
Total - Visited Britain	31%	33%	31%
Total - Visited elsewhere	32%	30%	30%
Experience Seekers – visited Britain	40%	34%	22%
Experience Seekers – visited elsewhere	37%	33%	23%

Booked key elements of leisure break / holiday to Britain – by market



Those whose last trip was to Britain are slightly more likely to have booked a package and slightly less likely to have booked some parts together or everything separately

I3: And thinking about this break or holiday to Britain, which of the following is true when it came to booking the elements of your trip.
Base n=22,840; global weighting applied. Countries unweighted

kubi kalloo

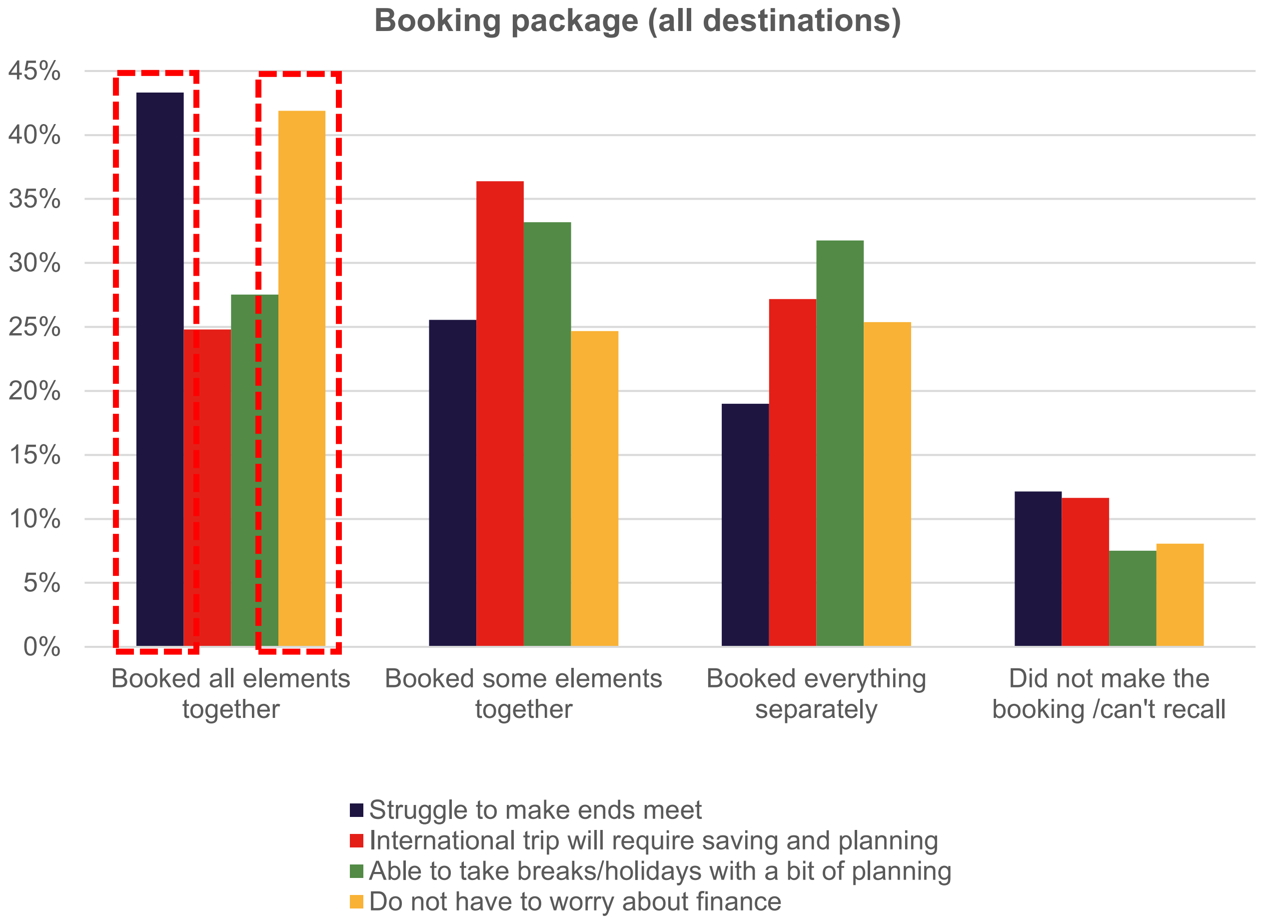
VISIT BRITAIN

Those visiting family and friends are less likely to book packages. Those looking for relaxing or familiar breaks are more likely to do so

%	Relaxing, resting, recharging	Spoiling/treating myself	Familiar, comforting, reconnecting	Exploring, stimulating, learning or challenging yourself	Seeing famous sites, places, ticking off the 'must do' list	Bespoke, unique, unusual experiences and adventures	High energy, action-filled fun times	Visiting family and friends	Total
I booked all key elements of the trip as one package	35%	32%	37%	34%	31%	34%	38%	19%	31%
I booked some, but not all elements together	32%	33%	32%	34%	33%	35%	34%	26%	31%
I booked everything separately	27%	29%	25%	26%	32%	27%	25%	43%	30%
I didn't make the bookings - someone else did this on my/our behalf	4%	4%	4%	3%	4%	4%	3%	8%	7%

I3: And thinking about this break or holiday to Britain, which of the following is true when it came to booking the elements of your trip.
Base n=22,840; global weighting applied. Countries unweighted

Both the *most* and *least* affluent travellers report a higher likelihood of booking a package trip if visiting Britain



Consumers who are most financially secure are more likely to opt to book their travel with the ***least effort.***

They would also like to choose packages that ***include all their desired activities***. Intermediaries often have all inclusive premium packages for these consumers.

Simultaneously, people who are the least financially secure also tend to book all elements of their travels together to ***minimise the costs and maximise the value*** (e.g. all inclusive holiday)

Therefore, travellers who are not at extreme ends financially might have more ***flexibilities*** and would like to pick and choose between value for money and desirable activities.

I3: And thinking about this break or holiday to Britain, which of the following is true when it came to booking the elements of your trip.
Base n=22,840; global weighting applied. Countries unweighted

Multigenerational households and travellers with kids are comparatively more likely to opt for package holidays

Multi-generational households might require ***internal negotiations within the households***, and it can be easier to book packages designed for the households.

Single person/couple with children have ***different priorities*** and would potentially like to have things organised for them to make life easier.

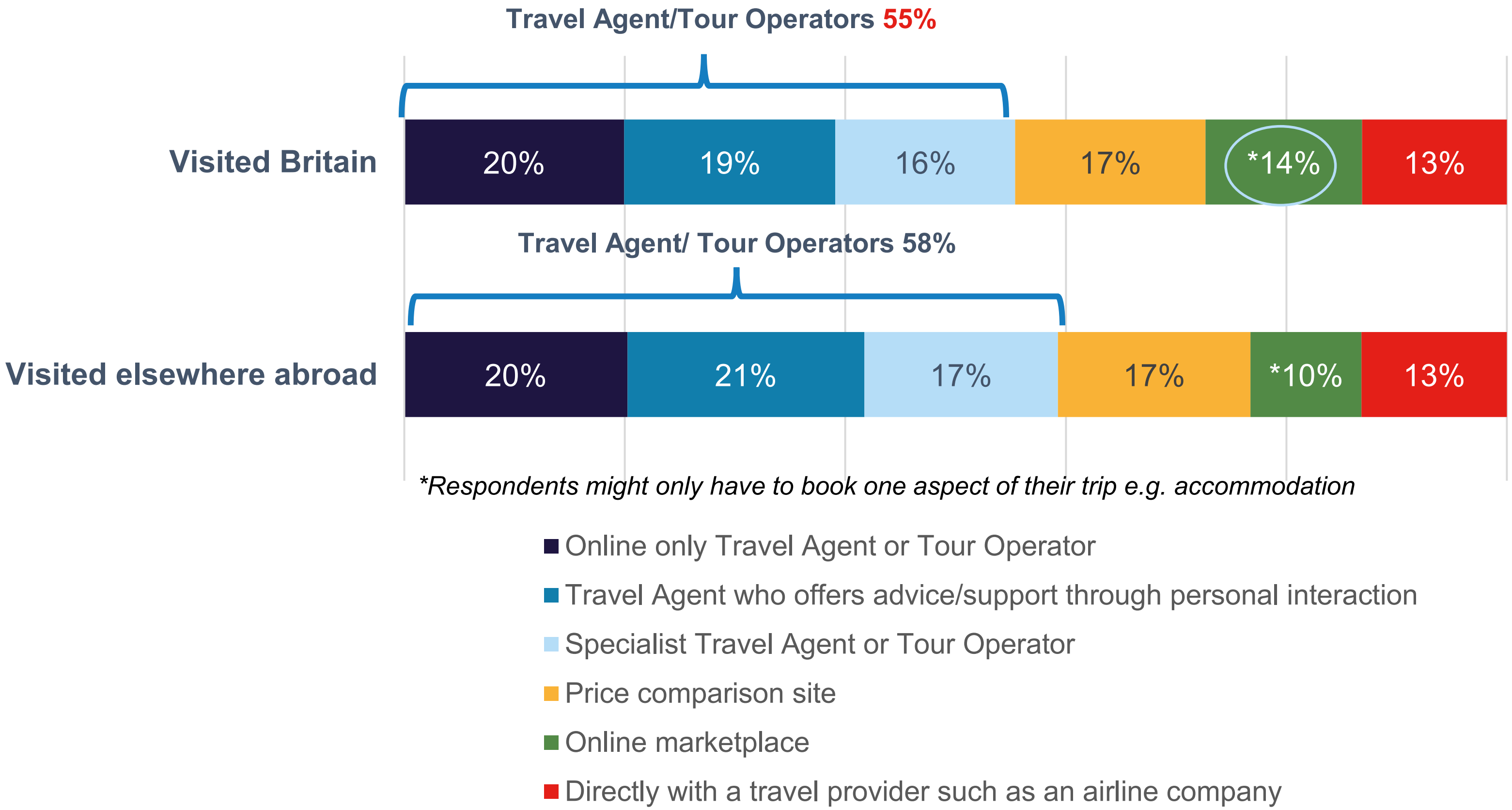
Single person/couple with children are more likely to choose a package instead of booking different elements separately. A package also usually includes ***activities and facilities which will keep the children happy and give parents a break.***

I3: And thinking about this break or holiday to Britain, which of the following is true when it came to booking the elements of your trip.
Base n=22,840; global weighting applied. Countries unweighted

Packages are mostly booked through travel agents/tour operators. Online marketplaces are used less often but more commonly when travelling to Britain than other destinations

It is important to note the importance that offline Travel Agents continue to have within the booking phase.

Main resource used when booking as one package to Britain



*Respondents might only have to book one aspect of their trip e.g. accommodation

For the main markets that book as a package to Britain:

- **Saudi Arabia** less likely to personally interact with a travel agent (13%) and more likely to deal directly with an airline (17%) when booking a trip to Britain
- **India** visitors used online marketplaces (21%) more than any other place
- **Brazilians** relied heavily on travel agents (68%) and especially specialist operators (22%)
- **UAE** visitors turned to online travel agents (25%) and price comparison sites (23%)
- **China** employed specialist travel agents (21%)
- No unique differences for **USA**

I4: And which of these best captures how you booked your [package] trip?
Base Weighted Global Package bookings N=.7,082; Visited Britain N=2,594, Visited elsewhere abroad N=3,083

One-in-three travellers report booking their travel in one package but it is much lower for short haul markets than long haul travellers

Travellers who are visiting friends and family **spend less time planning and booking.** These travellers are also **less likely to book all their elements in one package**.

Travellers who book everything separately might be **visiting friends and family.** They are less likely looking for other kinds of holidays.

Travellers with kids or from multigenerational households have different priorities and more likely to book all elements in one package

Those at **both ends of the affluence spectrum** are more likely to **book packages**, than those in the middle. With both the high and low end better catered for than the middle

In Summary

Travellers use different resources to plan and book their trips according to their preferred types of holiday.

Those who are looking for the most relaxing holidays, have the least relaxing customer journey, engaging with more touchpoints than those seeking any other holiday type.

Intermediary use summary

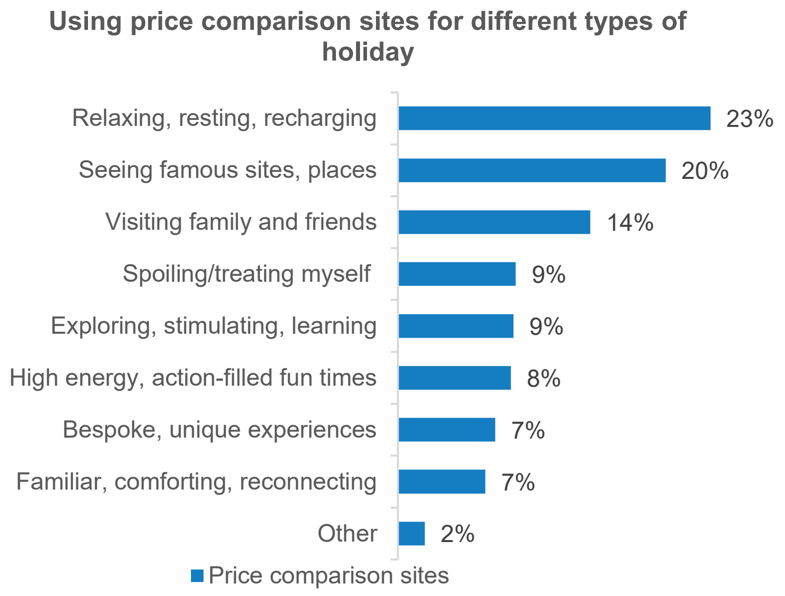
The touchpoints throughout the customer journey. How consumers use these intermediaries and why do they choose these intermediaries.

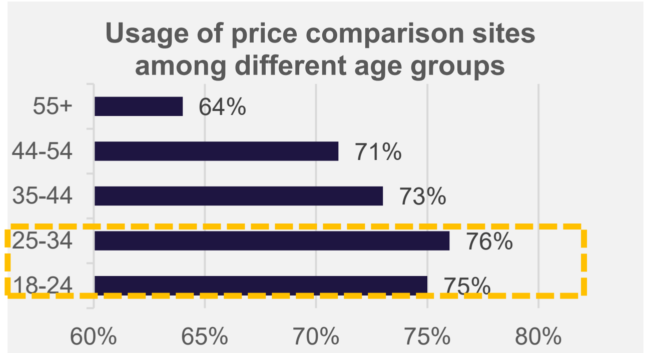
Price Comparison Site

Price comparison site refers to a website/app that aggregates travel deals (such as flights and accommodation) from other sites e.g. Skyscanner.

They are one of the most used intermediaries when travellers book their trip. ***1 in 4 (24%)*** booked at least some part of their international travel through price comparison sites.

Price comparison sites are most likely used in the deciding stage with more than 40% of respondents





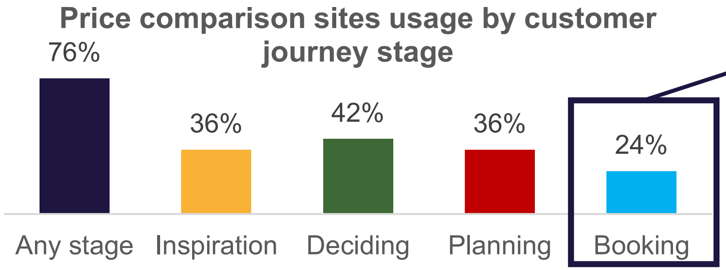
Price comparison site usage

Experience seekers: 76%

Non-experience seekers: 71%

Premium tourists: 72%

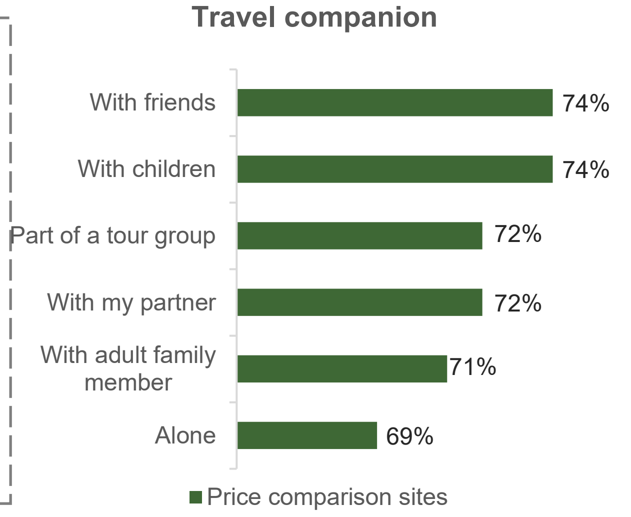
Total population: 72%



Booked:	Package	Accommodation	Travel
Adventurers	19%	20%	23%
Experience Seekers	19%	23%	25%
Explorers	13%	18%	19%
Sightseers	15%	19%	22%
Culture Buffs	18%	23%	24%
All Travellers	**17%**	**21%**	**23%**

Experience Seekers are most likely going to book at least some parts of their travels through Price comparison sites

Explorers are least likely to use price comparison sites at their booking stage



Top markets using price comparison sites during the customer journey*

(Global average: 76%)

France **Italy** **Saudi Arabia** **Belgium**

MIDAS VB/Kubi Kalloo – June 2022. **Standardized within market to eliminate cultural biases.. Percentages only represent the usage differences of intermediaries within each market*

Online Marketplace

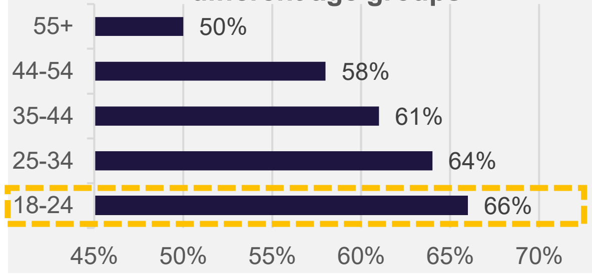
Online marketplace refers to a website/app that connects the traveller with accommodation and experience providers directly e.g. Airbnb, HomeAway

Almost ***1 in 5 (18%)*** booked at least some part of their international travel through an online marketplace.

Online marketplace has similar level of usage across different customer journey stages. Around 30% of travellers are using online marketplace across each stage.

Using online marketplace for different types of holiday

Usage of online marketplace among different age groups



Online marketplace usage

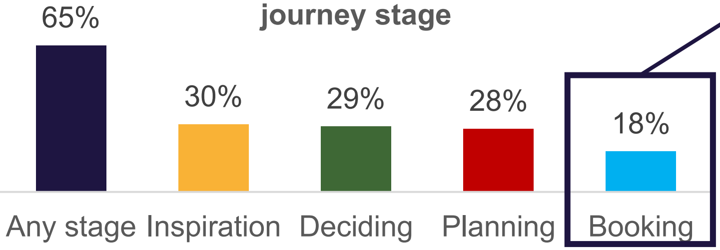
Experience seekers: 68%

Non-experience seekers: 57%

Premium tourists: 63%

Total population: 60%

Online marketplace usage by customer journey stage



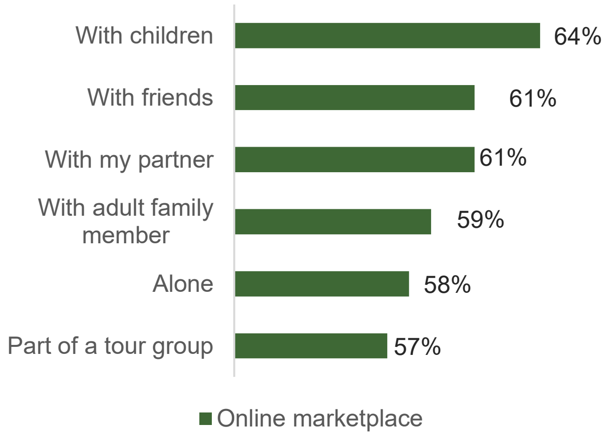
Booked:	*Package	Accommodation	Travel
Adventurers	10%	18%	13%
Experience Seekers	15%	19%	16%
Explorers	8%	16%	13%
Sightseers	10%	15%	11%
Culture Buffs	13%	18%	14%
All Travellers	**12%**	**18%**	**14%**

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

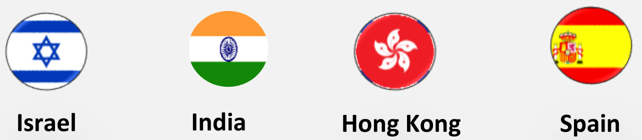
Experience Seekers are most likely going to book at least some parts of their travels through online marketplace

Explorers & sightseers are least likely to use online marketplaces in their booking stage

Travel companion



Top markets using online marketplace during the customer journey*
(Global average : 65%)

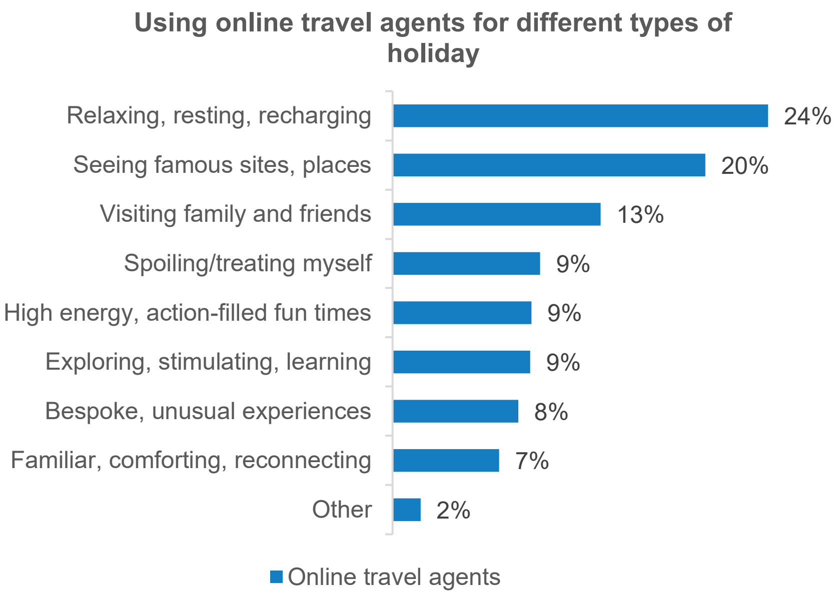


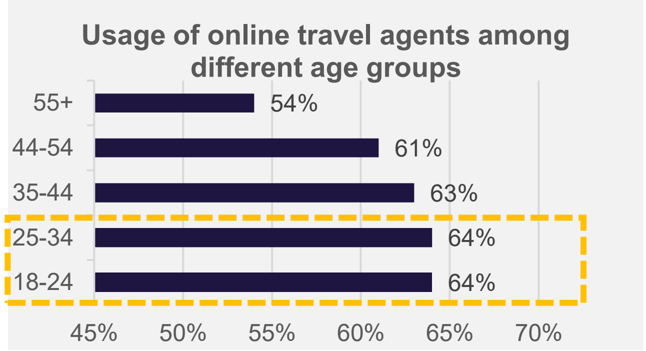
Online Travel Agents or Operators

Online travel agents or operators offer a wide range of travel deals (such as flights, accommodation, car hire) e.g. Expedia

Online travel agents have similar level of usage across different customer journey stages. Around 30% of travellers are using online travel agents across all stages.

Almost ***1 in 5 (20%)*** booked at least some part of their international travel through online travel agents or operators.





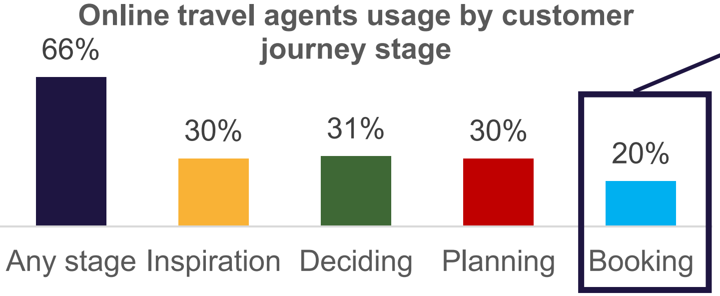
Online travel agents or operator usage

Experience seekers: **67%**

Non-experience seekers: **59%**

Premium tourists: **66%**

Total population: **61%**

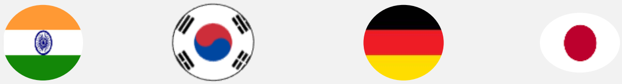


Booked:	Package	Accommodation	Travel
Adventurers	19%	15%	16%
Experience Seekers	19%	17%	17%
Explorers	21%	16%	14%
Sightseers	19%	19%	17%
Culture Buffs	19%	18%	17%
All Travellers	**19%**	**17%**	**16%**

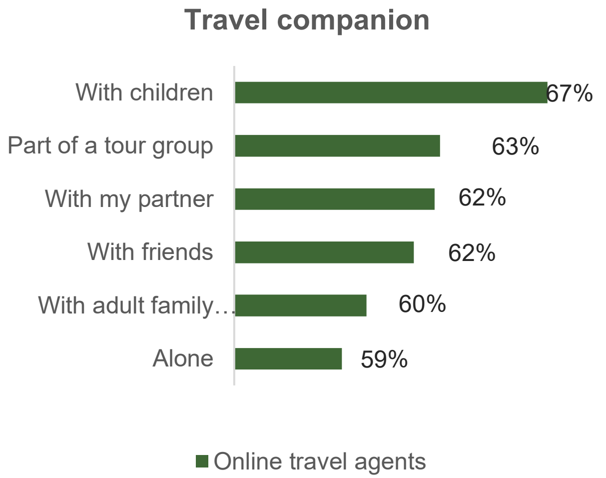
Experience Seekers are most likely going to book at least some parts of their travels through online travel agents

Explorers are least likely going to use travel agents in their booking stage

Top markets using online travel agents during the customer journey
(Global average : 66%)



India **South Korea** **Germany** **Japan**



MIDAS VB/Kubi Kalloo – June 2022. **Standardized within market to eliminate cultural biases.. Percentages only represent the usage differences of intermediaries within each market*

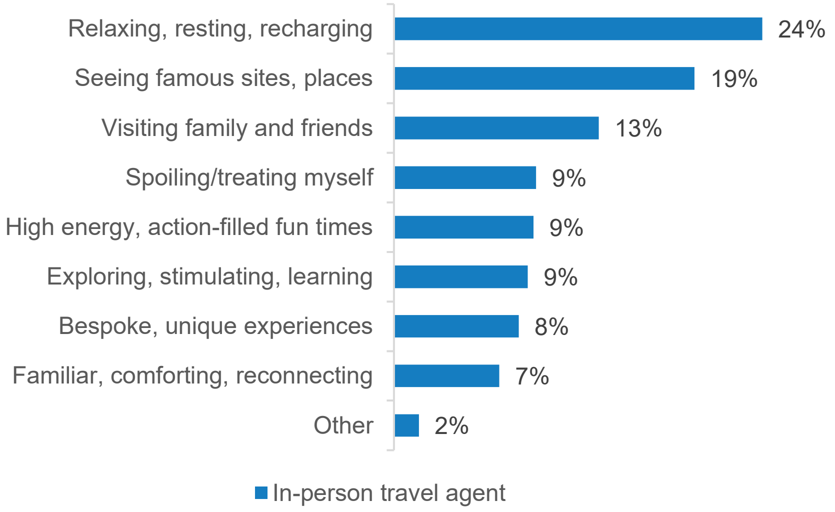
In-Person Travel Agents

In person travel agents refer to travel agents who offer advice/support through personal interactions in high street shop or through telephone e.g. TUI

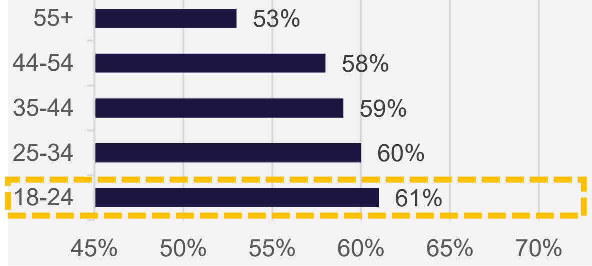
In-person travel agent remains an important intermediary with around ***1 in 6 (16%)*** booking at least some part of their international travel through in-person travel agents.

In-person travel agents have similar level of usage across different customer journey stages. Around 30% of travellers are using in-person travel agents across the different stages.

Using in-person travel agents for different types of holiday



Usage of in-person travel agents among different age groups



In-person travel agent usage

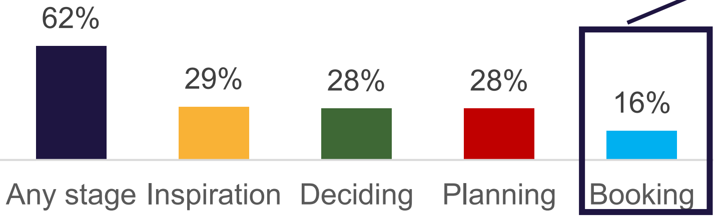
Experience seekers: 65%

Non-experience seekers: 55%

Premium tourists: 63%

Total population: 58%

In-person travel agents usage by customer journey stage

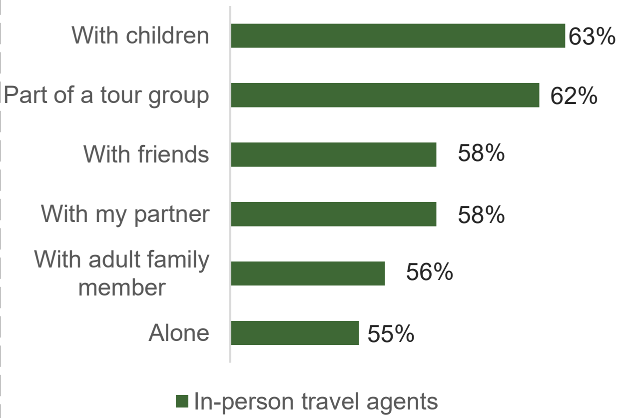


Booked:	Package	Accommodation	Travel
Adventurers	21%	10%	11%
Experience Seekers	18%	12%	12%
Explorers	25%	9%	11%
Sightseers	24%	9%	10%
Culture Buffs	19%	11%	12%
All Travellers	**21%**	**11%**	**11%**

Experience Seekers are most likely going to book at least some parts of their travels through in-person travel agents

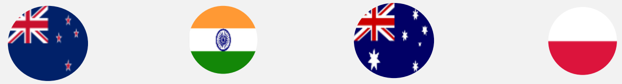
Adventurers are least likely going to use in-person travel agents in their booking stage

Travel companion



Top markets using in-person travel agents during the customer journey

(Global average : 62%)



New Zealand **India** **Australia** **Poland**

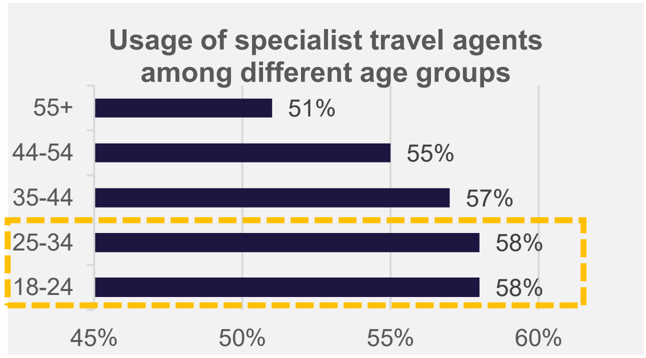
MIDAS VB/Kubi Kalloo – June 2022. **Standardized within market to eliminate cultural biases.. Percentages only represent the usage differences of intermediaries within each market*

Specialist Travel Agents

Specialist travel agents refer to travel agents or operators that focuses on specialist interest travel and tours e.g. golf tours, cruise, premium travel

Specialist travel agents have similar level of usage across different customer journey stages at a slightly lower rate to other intermediary's at around 27%.

Specialist travel agents cater specific groups of travellers' needs. Therefore, it has the lowest booking percentage of all intermediaries. Around ***1 in 8 (13%)*** booked at least some part of their international travel through specialist travel agents.



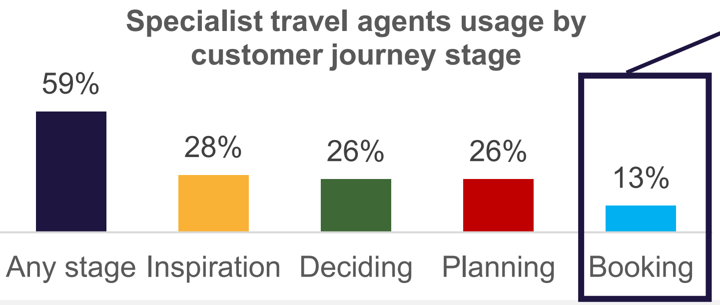
Specialist travel agents' usage

Experience seekers: 63%

Non-experience seekers: 53%

Premium tourists: 61%

Total population: 56%



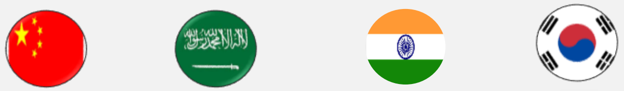
Booked:	Package	Accommodation	Travel
Adventurers	18%	7%	7%
Experience Seekers	16%	10%	10%
Explorers	17%	6%	6%
Sightseers	15%	7%	7%
Culture Buffs	17%	9%	9%
All Travellers	**17%**	**8%**	**8%**

Experience Seekers are most likely going to book at least some parts of their travels through specialist travel agents

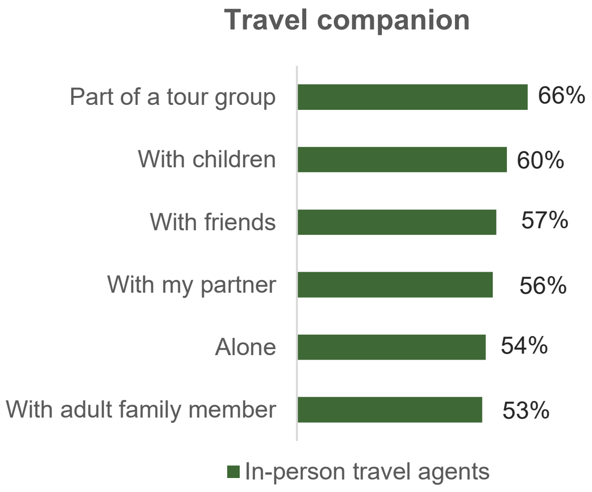
Explorers are least likely going to use specialist travel agents in their booking stage

Top markets using specialist travel agents during the customer journey

(Global average : 59%)



China **Saudi Arabia** **India** **South Korea**

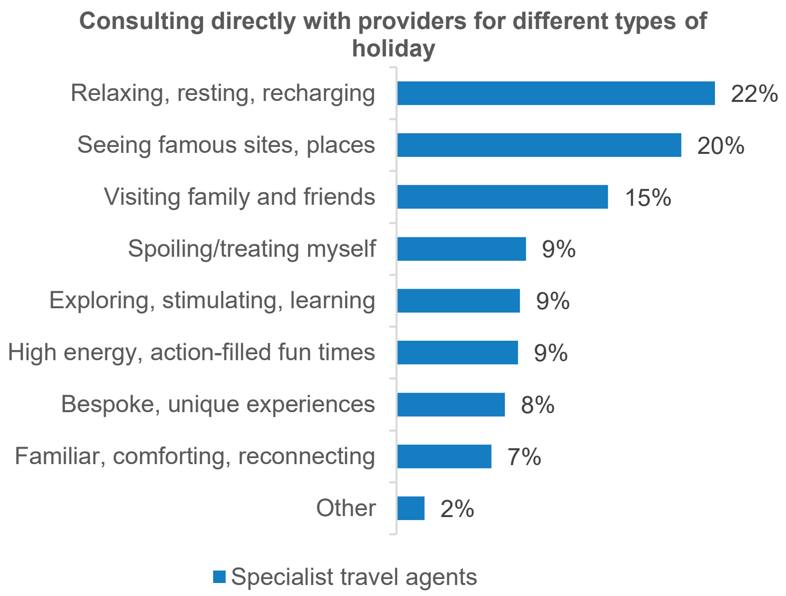


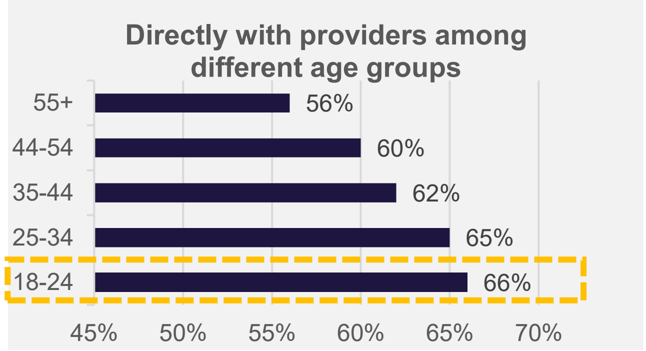
Directly with providers

Consumers also book directly through providers. These providers include airline companies and accommodation providers.

Travellers use providers differently across different stages of their consumer journeys. They are more likely to use service providers in the deciding and planning stages (1 in 3 travellers). They are less likely to use providers in the inspirational stage, while around 1 in 5 travellers book directly.

Experience Seekers are less likely to book parts of their travels directly with providers. However, they are particularly more popular among Explorers, Sightseers, and Adventurers to book their accommodations or their travels.

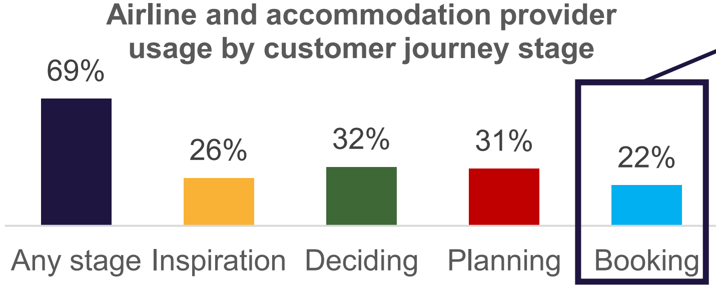




Airline and accommodation provider usage

Experience seekers: 67%
Total population: 60%

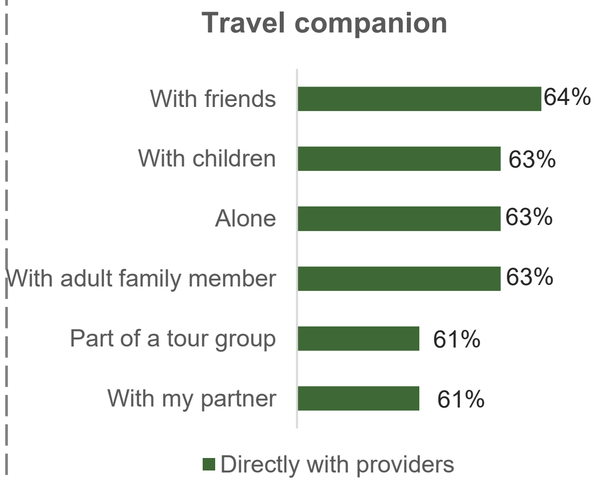
Premium tourists: 65%
Total population: 62%



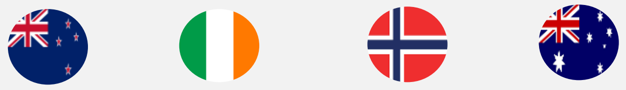
Booked:	Package	Accommodation	Travel
Adventurers	12%	22%	25%
Experience Seekers	12%	15%	17%
Explorers	13%	26%	28%
Sightseers	14%	23%	27%
Culture Buffs	12%	16%	21%
All Travellers	**12%**	**19%**	**23%**

Experience Seekers and Culture Buffs are least likely to book at least some parts of their travels directly

Adventurers, explorers and sightseers are most likely going to book some parts of their travel directly



Top markets using travel and accommodation provider during the customer journey
(Global average : 69%)



New Zealand **Ireland** **Norway** **Australia**

Peer Review Sites

Peer review sites refer to apps or websites that collate reviews from other travellers (e.g. Tripadvisor)

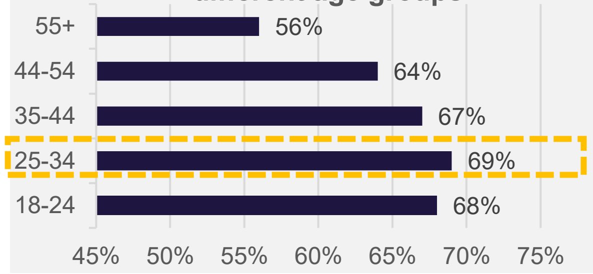
Peer review sites are trusted by all age groups and people from different age groups used peer review sites throughout the customer journey.

Almost all travellers are likely to use peer review sites. Especially in the earlier stages of the customer journeys.

It should also be noted that older age group (55+) are significantly less likely to use peer review sites being less tech savvy in general. Travellers who are visiting family and friends are also less likely to use peer review sites.

Using peer review sites for different types of holiday

Usage of peer review sites among different age groups

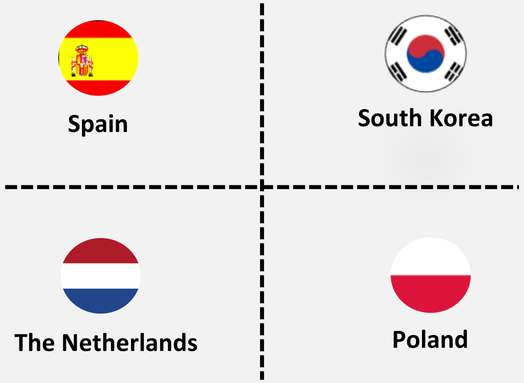


Peer review sites usage

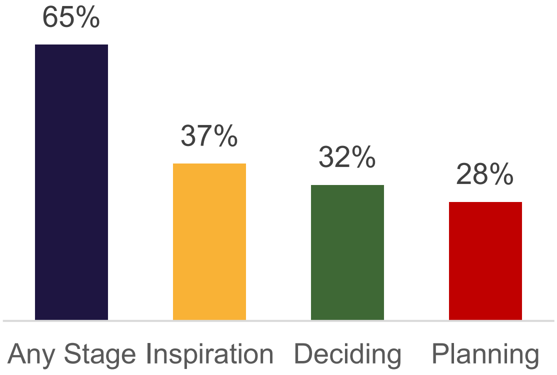
Experience seekers:	Premium tourists:
69%	68%
Total population:	Total population:
64%	65%

Top markets using peer review sites during the customer journey

(Global average: 65%)



Peer review sites usage usage by customer journey stage



Travellers tend to use peer review sites in the ***earlier stages*** of their customer journeys.

Travel companion

MIDAS VB/Kubi Kalloo – June 2022. **Standardized within market to eliminate cultural biases.. Percentages only represent the usage differences of intermediaries within each market*

Price comparison sites and peer review site are the most used intermediaries in the customer journey

Consumers use price comparison sites at all stages of the customer journey, most notably the deciding and booking stages. Additionally, peer review sites are valued for providing third party, more trust-worthy information to consumers, these are often used in the inspiration and deciding stages.

	Southern Europe	Northern Europe	Western Europe	Central Europe	SEA	Middle East	South Asia	East Asia	North America	South America	Oceania	All travellers
Price comparison site	71%	79%	71%	83%	73%	84%	86%	66%	64%	60%	70%	72%
Online marketplace	55%	67%	59%	78%	70%	81%	76%	52%	45%	45%	51%	60%
Online only Travel Agent or Tour Operator	55%	71%	61%	80%	73%	80%	76%	56%	44%	49%	49%	61%
In-person travel agents	60%	71%	58%	76%	67%	80%	71%	50%	43%	41%	45%	58%
Specialist Travel Agent or Tour Operator	53%	67%	58%	77%	67%	77%	69%	43%	40%	40%	48%	56%
Peer Review Site	57%	76%	63%	82%	64%	82%	78%	60%	54%	50%	65%	65%
Airline/Airline Holiday Companies	66%	71%	65%	79%	58%	81%	73%	49%	48%	53%	50%	62%
None of the above	25%	9%	19%	17%	4%	19%	9%	24%	24%	28%	15%	20%

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 Weighted.
Numbers are statistically higher than the average @ 95% confidence

Appendix

Questions on Customer Journey

The following key questions included in the MIDAS survey form the basis of the Customer Journey deeper dive analysis:

I1. Inspiration
Please select the main places/tools/sources which inspired you to consider the break or holiday in [DESTINATION]. Select all that apply.

I2: Role of Intermediaries
Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages.

- Inspiration: what do you/where do you look for your inspiration?
- Deciding: what do you use to help you decide?
- Planning: what do you do when planning your trip/accommodation/activities etc?

I3. How the Stages Fit Together
And thinking about this break or holiday to [DESTINATION], which of the following is true when it came to booking the elements of your trip.

I4. Booking – Package
And which of these best captures how you booked your trip?

I5. Booking – Travel
And which of these best captures how you booked your travel to and from [DESTINATION]?

I6. Booking – Accommodation
And which of these best captures how you booked your accommodation in [DESTINATION]?
If you made multiple bookings, please select the MAIN one that applies.

I7. Travel Agent
What do you see as the main benefits of booking through a travel agent?
Please select all that apply

I8. Internal Travel
Did you buy the following when you visited Britain and, if so, when?