AUSTRALIA BUZZSEEKERS AND EXPLORERS
HOW TO READ THE PEN PORTRAITS

Most used information sources
- These are the three most used information sources across 5 stages of the journey (Inspiration, Making the decision, Making the ‘big’ bookings, Making the itinerary and Daily inspiration and support on the trip).
- The colour coding refers to how the scores compare to the average for the market. If the source is used more (green) or less (red) than the market average this is flagged. Orange means that it is average for this market.

Value
- This is based on reported spend by the respondents in the quant survey. There are a few additional factors also included such as propensity to visit Britain, whether they’ve already been and size of party.

Living
- The research asked about how many children were in the household, which is what is reported here. This does not necessarily mean that the same proportion travel with children even if they are in the home.

Appealing activities + Point of difference
The top 3 activities are those that were most highly selected and the point of difference are those where this segment over-indexes most compared to the average for the market.

What makes them unique
- The statements listed here are those where the segment over-indexes the most when compared to the average for the market.

Fieldwork for this project was carried out in 2017, and 2000 international travellers were interviewed in each market, but GCC where 500 Saudi and 500 Emirati nationals, all international travellers were interviewed. The results were then weighted by age in each market and the below table shows the sample size of each priority segment in each market.

<table>
<thead>
<tr>
<th>Market</th>
<th>Segment</th>
<th>Sample Size</th>
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</thead>
<tbody>
<tr>
<td>Australia</td>
<td>Buzzseekers</td>
<td>660</td>
</tr>
<tr>
<td></td>
<td>Explorers</td>
<td>495</td>
</tr>
<tr>
<td>China</td>
<td>Buzzseekers</td>
<td>893</td>
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<tr>
<td></td>
<td>Culture Buffs</td>
<td>684</td>
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<tr>
<td>France</td>
<td>Buzzseekers</td>
<td>755</td>
</tr>
<tr>
<td></td>
<td>Explorers</td>
<td>423</td>
</tr>
<tr>
<td>Germany</td>
<td>Buzzseekers</td>
<td>480</td>
</tr>
<tr>
<td></td>
<td>Explorers</td>
<td>739</td>
</tr>
<tr>
<td>India</td>
<td>Buzzseekers, 25+ only</td>
<td>1,068</td>
</tr>
<tr>
<td>USA</td>
<td>Buzzseekers</td>
<td>767</td>
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<tr>
<td></td>
<td>Sightseers</td>
<td>293</td>
</tr>
<tr>
<td>GCC</td>
<td>Culture Buffs</td>
<td>281</td>
</tr>
<tr>
<td></td>
<td>Buzzseekers</td>
<td>210</td>
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</tbody>
</table>

The analysis on each of the following Pen Portraits is based on the corresponding sample sizes above.
Australian Buzzseekers are experienced enough at travel and with newly found wealth, they have the confidence, friendship groups (including partners) and means to fulfil their youthful dreams and explore the world. They are modern and affluent ... GB is not necessarily new to them.

INCOME
GROWING AFFLUENCE
High earning and open to spending, contributing anticipated 30% of tourism value from Australians to GB

LIVING
35% have kids, but 61% live with other adults only (including 16% with their parents)

AGE

<table>
<thead>
<tr>
<th>18-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>22%</td>
<td>33%</td>
<td>25%</td>
<td>19%</td>
<td>2%</td>
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</tbody>
</table>

GENDER

| 48% | 52% |

WHAT MAKES THEM UNIQUE?

- I prefer holidays full of activities and excitement: Buzzseekers 29%, All Australians 78%
- I always seek out new experiences: Buzzseekers 43%, All Australians 72%
- When I travel, I enjoy exclusive or luxury experiences that others...: Buzzseekers 22%, All Australians 44%
- I’m always looking for new things to do with my time: Buzzseekers 45%, All Australians 64%
- I seek out adventure: Buzzseekers 30%, All Australians 50%
- I would describe myself as an ambitious person: Buzzseekers 28%, All Australians 48%

VALUE
Mid-high*  

VISITATION TO GB
14% visited in past 2yrs
Propensity to visit ranks 5th after USA, Canada, Thailand, Japan

APPEALING ACTIVITIES FOR INTERNATIONAL HOLIDAY

Top 3 activities per segment
- Trying local food and drink specialties
- Visiting famous iconic places
- Experiencing city life

Point of difference
- Hands on learning activities
- Challenge and/or action filled activities

TRAVEL COMPANIONS

- With one other person 37%
- With a small group of friends (fewer than 5) 17%
- With a small family group (fewer than 5) 27%
- On their own 11%

TRAVEL COMPANIONS

MOST USED INFORMATION SOURCES

- Family + Friends: 42%
- Specific websites (e.g. airline sites, hotel sites, train travel sites etc.): 36%
- Online reviews: 35%

*Value is derived from % of segment who have visited GB in the past 2 years, their reported spend, their propensity to visit in future and estimated spend per person
LET ME INTRODUCE MYSELF

Hey, I’m Nick and I’m 31 years old, living with my girlfriend in Bondi. We both work hard and don’t want to compromise. I’m sociable, fun-loving & open-minded but I’m also easily bored – I’m always filling my life with as many things as I can & that’s how I travel too...

MY IDEAL HOLIDAY

✓ Full of adventure
✓ Right off the beaten track
✓ With my girlfriend & all our mates
✓ Big cities, bright lights & plenty of partying with the locals
✓ New experiences that help us grow
✓ And plenty of stories to tell afterwards!

I REALLY DON’T WANT TO...

✗ To waste any time – I’ve travelled a long way and I can sleep when I’m home
✗ To just ‘do’ the typical tourist things – I want authentic & challenging
✗ To compromise – I’d rather pay a bit more than miss out while I’m on holiday

POSTCARD

Having a fantastic time – London is buzzing and we are making the most of it. Seen all the usual sights but also found loads of places that only the locals know about. Packing in as much as we possibly can – really pleased with all the plans we made and we’ve added in stuff we’ve found along the way too. Had a fantastic evening last night – went to a cute little pub and chatted to the locals. One of them told me about a place where they carry burning tar barrels through the streets for some festival – will cost a fortune to get there but worth it, sounds awesome & where else could you do that?!
Explorers in Australia are defined by their age, but they do not see the world this way! Their appetite and enthusiasm to explore the world has emerged as a deliberate rejection of the previous generation’s constraints (age, physicality, travel affordability, etc.). They are heavily driven by the desire to EXPLORE which must include a relatively strong dose of spoiling oneself and enjoying the luxuries of comfortable accommodation and good food and drink. GB is really high on their list of holiday destinations.

**INCOME**
**ASSET RICH**
Strong asset base and, for those still working, highest income brackets. Careful to spend as money is not always liquid.

**LIVING**
25% have kids, but 69% live with other adults only (49% with their partner).

**AGE**

<table>
<thead>
<tr>
<th>Age</th>
<th>10%</th>
<th>14%</th>
<th>17%</th>
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<th>39%</th>
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<td>18-34</td>
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**WHAT MAKES THEM UNIQUE?**
- I know the type of thing I like, and tend to stick with that 57%
- I enjoy spending time in the outdoors and in natural landscapes 62%
- I am comfortable with who I am – I don’t care how others see me 73%
- I prefer holidays at a slower and more relaxed pace 71%
- I prefer stability 70%
- I am happy with what I have 72%

**VISITATION TO GB**
16% visited in past 2yrs
Propensity to visit ranks 1st before Canada, USA, Thailand, Ireland

**VALUE**
High*

**APPEALING ACTIVITIES FOR INTERNATIONAL HOLIDAY**
Top 3 activities per segment
- Visiting famous iconic places
- Experiencing country life and scenery
- Exploring history and heritage

Point of difference
- Visiting a park/garden
- Country life
- History

**TRADE COMPANIONS**
With one other person 53%

With a small family group (fewer than 5) 20%

With a small group of friends (fewer than 5) 9%

**MOST USED INFORMATION SOURCES**
- Family + Friends 54%
- Specific websites (e.g. airline sites, hotel sites, train travel sites etc) 42%
- Travel agents 40%

*Value is derived from % of segment who have visited GB in the past 2 years, their reported spend, their propensity to visit in future and estimated spend per person.
Hi I’m Alison and I’m 60 years old, getting closer to retirement and enjoying all that life has to give me. I’m not the type of person that likes to stay home and do nothing as I’m always around doing something and planning my next trip!

- Historically and culturally rich
- Balanced adventure
- Outdoorsy and in touch with nature
- With my significant other
- Experiencing the local culture in an authentic way

× Sit around in a pool and only have a relaxing holiday - I also need some activities to do
× Same old touristy activities and places – I’ve come this far to explore something new and different
× Off the beaten path but not too much – I like adventure but I also want something safe, affordable and easy.

Hello,
We’re having an incredible time here in the British countryside. Our B&B is good – clean and comfortable and the landlady has given us some good tips for things to do. So far, we have visited a natural park and some charming little villages. We’ve been on some lovely walks – pity about the rain but at least we knew to expect it! We got into a really interesting conversation with the local people at the village pub. Feels like I’m really getting to grips with what it means to see the life though their perspective.