CHINA CULTURE BUFFS AND BUZZSEEKERS
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>
</tr>
</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>
</tr>
<tr>
<td></td>
<td>Culture Buffs</td>
<td>684</td>
</tr>
<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>
</tr>
<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>
</tr>
</tbody>
</table>

The analysis on each of the following Pen Portraits is based on the corresponding sample sizes above.
BUZZSEEKERS SNAPSHOT

This group is outgoing, dominant and likes to reward their work efforts and success by indulging during their holidays. They tend to be the leaders in their group of friends and enjoy being in charge and being respected. As such, they plan their holidays well in advance, but would still appreciate to make new discoveries by chance: their itinerary is not based on too extensive research and remains quite flexible to let their destination surprise them, and make sure they don’t miss out on anything! They travel frequently and like some adventure – but within a safe comfort zone of premium – spending money to ensure that nothing can go wrong.

WHAT MAKES THEM UNIQUE?

- I prefer holidays full of action and excitement
- I always seek out new experiences
- My friends would describe me as a trendsetter
- I like to be noticed
- I seek out adventure
- When I travel, I enjoy exclusive or luxury experiences that others...

INCOME
HIGH AFFLUENCE
Affluent and keen to show it! One in five say they are ‘lucky to be able to treat themselves regularly without worrying about finance”

LIVING
55% have kids, but 32% live with other adults only (16% with their partner)

AGE
- 16% 18-24
- 27% 25-34
- 22% 35-44
- 20% 45-64
- 15% 65+

VISITATION TO GB
13% visited in past 2yrs
Propensity to visit ranks 3rd after Australia, Thailand and before USA, France

APPEALING ACTIVITIES FOR INTERNATIONAL HOLIDAY

Top 3 activities per segment
- Trying gourmet/world class food and drink
- Trying local food and drink specialties
- Visiting famous/iconic places

Point of difference
- Challenge and/or action filled activities

% who have visited
- 23% London only
- 57% Other major cities
- 39% Countryside
- 38% Coast

VALUE
High*

TRAVEL COMPANIONS

# LEISURE TRIPS AWAY FROM CHINA IN PAST 2YRS

5.4

I prefer holidays full of action and excitement

I always seek out new experiences

My friends would describe me as a trendsetter

I like to be noticed

I seek out adventure

When I travel, I enjoy exclusive or luxury experiences that others...

Most Used Information Sources

Family + Friends
41%

Specific websites
38%
(e.g. airline sites, hotel sites, train travel sites etc)

All-in-one travel websites
31%

VisitBritain
Hi, My name is Chang and I live in Shanghai. I am quite successful, with a good career and a great apartment with all the latest mod cons. It’s great because it means I can afford to travel quite often. I usually travel with a group of my friends – usually I am the ring-leader so I get to decide where we go and what we do – which is just how I like it!

- Premium, luxury and indulgent
- Something to enjoy at the time and show off about afterwards
- Plenty of shopping for upmarket brands
- A bit of celeb spotting
- Seeing the main sights

× Rough it
× Make an effort
× Take it easy
× Go where most tourists go
GENTLE, GRACEFUL AND EASY GOING, THIS GROUP IS VERY CURIOUS ABOUT THE DETAILS OF LIFE AND CONSCIOUS OF HOW THEY PORTRAY THEMSELVES TO OTHERS. THEY HAVE TRAVELLED EXTENSIVELY AND, LEARNED TO BE MORE HUMBLE THROUGH EXPOSURE OF OTHER CULTURES. FOR THEM, HOLIDAYS ABOUT EMOTIONAL GROWTH AND INTELLECTUAL LEARNING – BRINGING HOME MEMORIES AND KNOWLEDGE TO ENHANCE THEIR LIVES.

WHAT MAKES THEM UNIQUE?

<table>
<thead>
<tr>
<th>Item</th>
<th>Cultural Adventurers</th>
<th>All Chinese</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer holidays at a slower and more relaxed pace</td>
<td>67%</td>
<td>100%</td>
</tr>
<tr>
<td>I care about the image I portray to others</td>
<td>68%</td>
<td>100%</td>
</tr>
<tr>
<td>When I travel, I like to be comfortable but don’t seek out luxury</td>
<td>77%</td>
<td>94%</td>
</tr>
<tr>
<td>When I travel abroad, I want to see the world’s most famous sites</td>
<td>91%</td>
<td>70%</td>
</tr>
<tr>
<td>I prefer stability</td>
<td>82%</td>
<td>68%</td>
</tr>
<tr>
<td>I know the type of thing I like, and tend to stick with that</td>
<td>70%</td>
<td>54%</td>
</tr>
</tbody>
</table>

VISITATION TO GB

12% visited in past 2 yrs
Propensity to visit ranks 6th after Thailand, USA, Australia, Sweden and France

VALUE
Mid-high*

APPEALING ACTIVITIES FOR INTERNATIONAL HOLIDAY

Top 3 activities per segment
- Trying gourmet/world class food and drink
- Trying local food and drink specialties
- Visiting famous/ iconic places

Point of difference
- No significant point of difference in comparison to the rest of the country

TRAVEL COMPANIONS

With one other person 32%
With a medium sized group (5-9) 18%
With a small family group (fewer than 5) 21%
With a small group of friends (fewer than 5) 15%

MOST USED INFORMATION SOURCES

<table>
<thead>
<tr>
<th>Source</th>
<th>Cultural Adventurers</th>
<th>All Chinese</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family + Friends</td>
<td>51%</td>
<td>38%</td>
</tr>
<tr>
<td>Specific websites (e.g. airline sites, hotel sites, train travel sites etc)</td>
<td>38%</td>
<td>28%</td>
</tr>
<tr>
<td>All-in-one travel websites</td>
<td></td>
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</tbody>
</table>

*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.
Hello, My name is Bai and I live with my husband and our daughter Ai in Beijing. Although we are reasonably well-off, we tend to live modestly, saving our money for the things that really matter – happiness and spiritual well-being. We travel as often as we can, but we choose good value options so that we can see as many places and do as much as we can while we are there...

**POSTCARD**

We are in Oxford which is just how we dreamed it would be – very beautiful and old. We walked through the University colleges and the beautiful gardens – so much learning and wisdom. Next we are going to London. We have tickets to watch Arsenal play and feel what it is like to be in the stands with the British as they support their teams. We are going to see all the sights – all the old buildings like the Tower of London, and then the modern buildings of the City right next door. And we have booked a visit to the Harry Potter experience – Jing Han is so excited and we all want to see Hogwarts!

**CULTURE BUFFS**

**LET ME INTRODUCE MYSELF**

**MY IDEAL HOLIDAY**

- Gain new experiences and understanding
- Learn and grow
- Understand local culture and history
- Experience the places I have dreamed about for myself
- Spend time with my partner and family

**I REALLY DON’T WANT TO**

- Just see the sights without understanding what they truly mean
- Do things just to say I have done them – I prefer activities that are meaningful for me