USA 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>
</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.
Relatively affluent and with plenty of time on their hands, this group is making the most of opportunities to travel, exploring new places and re-visiting much loved regions they have not had the time to see during their busy careers. Educated and sophisticated, they have a keen interest in history, culture and the arts, and choose holidays that are intellectually challenging, with a touch of indulgence & upmarket luxury.

**WHAT MAKES THEM UNIQUE?**

- I am more of a city person: 100%
- I prefer holidays at a slower and more relaxed pace: 98%
- I am comfortable with who I am – I don’t care how others see me: 92%
- I prefer stability: 74%
- I know the type of thing I like, and tend to stick with that: 58%
- I generally chose to take a holiday in a well-established tourist destination: 46%
- Most of the US: 60%

**INCOME**

**HAVE MONEY TO SPEND**

Those retired have savings to spend, but it might be tied up, so need time to plan. One in five earn in the highest income bracket, so clearly affluent.

**LIVING**

18% have kids, but 78% live with adults only (45% with their partner).

**AGE**

- 5%: 18-24
- 7%: 25-34
- 14%: 35-44
- 36%: 45-64
- 38%: 65+

**GENDER**

- 51%: Male
- 49%: Female

**VISITATION TO GB**

15% visited in past 2yrs

Propensity to visit ranks 2nd after Canada, and before Italy, France, Spain.

**APPEALING ACTIVITIES FOR INTERNATIONAL HOLIDAY**

- Visiting famous/iconic places
- Exploring history and heritage
- Trying local food and drink specialties

**Point of difference**

- Visiting famous places and exploring history
- Experiencing city life

**VALUE**

Mid-low*

**# TRIPS AWAY FROM THE US IN PAST 2YRS**

5.8

**TRAVERSAL COMPANIONS**

- With one other person: 55%
- With a small group of friends (fewer than 5): 10%
- With a small family group (fewer than 5): 19%
- On their own: 8%

**MOST USED INFORMATION SOURCES**

- Family + Friends: 49%
- Specific websites (e.g. airline sites, hotel sites, train travel sites etc): 32%
- Online reviews: 15%

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*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 Mark and I am 55, living in Manhattan, NYC, with my wife. The kids all have homes and families of their own now so we can relax and enjoy ourselves. We’ve worked hard all our lives and so we have enough put by to be able to enjoy the finer things in life – fine wine, good food and a bit of luxury. We might be retired but we are still active and we fit a lot in – including plenty of travel...

**LET ME INTRODUCE MYSELF**

**MY IDEAL HOLIDAY**

- A cultural adventure where we can learn and grow – history, art, music, architecture
- Plenty of socialising with the locals
- Lots to see and do – physically and mentally
- A little bit of the unexpected
- Some indulgence & sophistication

**I REALLY DON’T WANT TO…**

- Rough it – I’m due some indulgence at my time of life
- Waste time while I’m here – I want to make the most of it
- Waste my time ‘relaxing’ – I can do that when I’m back home

POSTCARD

So good to be back in London! Been back to all my old haunts but also found some new ones. Yesterday we went on a day tour to Stonehenge and today a food festival where we tasted English grown champagne & local produce – we were the only non-Brits there, found out about it through the hotel porter, who we have made friends with.

Next we travel to Stratford-upon-Avon to see where the family is from – hoping to see the chapel where our great grandparents were married, and we’re going to see Shakespeare’s birthplace while we’re there.

Must go – table booked at a great little restaurant we’ve found, good wine and the locals are friendly!

FROM: USA
Driven and active, this highly sociable group look for action-packed adventure holidays. They are competitive and like to show off, but also have a genuine interest in the places they visit, their history, culture and people. Hugely reliant upon social media, this group will ask for ideas and suggestions from all their friends (which they will seek to out-do) as well as sharing all their experiences afterwards...

### WHAT MAKES THEM UNIQUE?

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

### VISITATION TO GB

- 19% visited in past 2yrs
- Propensity to visit ranks 3rd after Canada, Italy, and before Spain, France

### VALUE

- Propensity to visit rank 3rd after Canada, Italy, and before Spain, France
- 19% visited in past 2 yrs
- % who have visited
  - London: 41%
  - Other major cities: 41%
  - Countryside: 24%
  - Coast: 9%

### Top 3 activities per segment

- Trying local food and drink specialties
- Visiting famous/iconic places
- Trying gourmet/world class food and drink

### Point of difference

- Challenge and/or action filled activities
- Hands on learning activities
- Attending a specific event

### TRAVEL COMPANIONS

- With one other person: 34%
- With a small group of friends (fewer than 5): 17%
- With a small family group (fewer than 5): 28%
- With a medium-sized group (5-9): 9%

### MOST USED INFORMATION SOURCES

- Buzzseekers
- All of the US
- Family + Friends: 47%
- Online reviews: 35%
- Specific websites (e.g. airline sites, hotel sites, train travel sites etc): 31%
Hi, My name is Steven and I live in California with my girlfriend. We are both career driven high achievers, working hard to play hard. Our apartment has all the latest designer gadgets and we enjoy eating out at the best restaurants. We have a big social group and often holiday with a group of friends as well as going off on adventures with just the two of us...

**My Ideal Holiday**

- Plenty of adventure and excitement
- Wows everyone with the amazing things I have done & the stories I can tell about it
- Very sociable – with my friends & mingling with the locals
- A bit of spoiling too – a night or two in a posh hotel, a massage, good food & fine wine

**I Really Don’t Want To...**

- Do the typical tourist thing
- Be bored
- Be on my own

Postcard:

Having a good time here in London – seen most of the sights and had some great nights out. Had dinner at the Shard which has one of the best views of London. We explored Brixton village, tasted some British delicacies and have sampled local beer in some great little pubs. There’s some carnival happening in Notting Hill tomorrow - we are all going to dress up and join in – can’t beat mixing with the locals. After that we’re getting the train to Manchester and then onto Scotland – want to see as much as we can while we’re here...

**From:**

USA