EXPERIENCE SEEKER PEN PORTRAITS

Source: MIDAS, VisitBritain/Kubi Kalloo, fieldwork March-April 2022
GLOBAL EXPERIENCE SEEKERS
Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Experience Seekers over-index on potential spend. If we shine the light on the PRIORITY Experience Seekers (highlighted), they represent 13% of global tourists, but a unique sub-segment which over-index on being younger, male and interested in new tourism trends.

GLOBAL EXPERIENCE SEEKERS (29%)

TOP DRIVERS OF DESTINATION CHOICE:
- Offers good value for money (87%)
- Is a welcoming place to visit (86%)
- I can roam around visiting many types of places (86%)
- Offers a lot of different experiences in one destination (86%)
- It has experiences I can’t have anywhere else (85%)

KEY PERCEPTIONS OF BRITAIN:
- Is a place where I can explore history & heritage (52%)
- There are vibrant towns & cities to explore (51%)
- Is good for seeing famous sites, places, ticking off the ‘must do’ list (51%)
- I can roam around many types of places (50%)

TOP ACTIVITY PREFERENCES:
- Explore local food & beverage specialties (73%)
- Experience coastal places and scenery (72%)
- Visit famous/iconic tourist attractions and places (70%)
- Experience city life (67%)
- Participate in action and adventure experiences (66%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)
Likely to consider:
- Australia (56%)
- Greece (56%)
- Italy (55%)
- France (53%)
- Spain (53%)

48% of GB visitors went beyond England (vs 43% other tourists); and 72% beyond London (vs 65% other tourists)

60% travel with their partner/spouse, but 31% travel with kids (multiple response data)

Sources of Inspiration for Experience Seekers:
- Recommendations by friends & family on social media 39%
- Recommendations or connections with friends & family 39%
- Travel bloggers and influencers 38%
- Travel websites or web pages 35%

Top Holiday Types Preferred (vs Global total)
- Britain 7.5 (vs 7.0)
- Anywhere internationally 6.4 (vs 5.5)

Base size: Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies
GLOBAL EXPERIENCE SEEKERS (29%)

TREND ENDORSERS (vs total)
- Wellbeing involved 18% (+3%)
- Sustainability engaged 28% (+7%)
- Inclusion seekers 30% (+5%)

LIVING
- 40% (+3%) have kids, and this is split evenly between kids <12 (52%) and 12yrs+ (46%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:
- If I don’t visit soon, I’d miss out (33%)
- Offers experiences I want to share on social media (48%)
- Offers good value for money (37%)
- Offers the opportunity to travel sustainably (41%)
- A good place for treating myself (44%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):
- Participate in action and adventure experiences (66%)
- Participate in sport (45%)
- Attend a sporting event (50%)
- Participate in wellness activities (46%)
- Attend a learning course (44%)
- Attend a music festival/event (58%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs global total)
Disproportionately more likely to consider…
- Canada (+17%)
- USA (+14%)
- Greece (+12%)
- Switzerland (+11%)
- France (+11%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:
Likely spend on 10-point scale, where 10 = super Priority and 1 = super budget

TRENDS ENDORSERS:
- Premium Tourists (8-10)
- Mid-Range Tourists (5-7)
- Budget Tourists (1-4)

TYPES OF HOLIDAYS:
- Total traveller population
- Experience Seekers

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:
- Offers experiences to share on social media (70%)
- If I don’t visit soon, I’ll miss out (69%)
- A good place for treating myself (74%)
- Has surprising and unexpected experiences (84%)
- It offers the opportunity to travel sustainably/responsibly (77%)
- Has a thriving arts and contemporary culture scene (74%)

TYPE OF ACTIVITIES:
- Participate in action and adventure experiences (66%)
- Participate in sport (45%)
- Attend a sporting event (50%)
- Participate in wellness activities (46%)
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SOURCES OF INSPIRATION (BIGGEST SKEWS):
- Travel bloggers and influencers
- Recommendation from friends on social media
- Music, concert tours
- Kids’ TV, movies, friends from school
- Wellbeing involved
- Sustainability engaged

GENDER
- Male: 50%
- Female: 50%

AGE
- *Modal age: 35yrs
- Median age: 37yrs
- *Age with the highest frequency

VISITORS (vs total)
- Britain Visitors (P5yrs) 42% (+3%)
- Considerers (P5yrs) 58% (-3%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:
- Experience Seekers
- Total traveller population

Base size: Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators.

The majority are using multiple resources in the booking phase, with one in 3 (35%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 37% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Online Market Places.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 65% use personal interactions with travel agents throughout their journey, and roughly half of these (30%) use them in the booking phase.

<table>
<thead>
<tr>
<th>Resources used for inspiration:</th>
<th>Price Comparison Site</th>
<th>Peer Review Site</th>
<th>Online Marketplace</th>
<th>Online only Travel Agent or Tour Operator</th>
<th>Travel Agent via Personal Interaction</th>
<th>Specialits Travel Agent or Tour Operator</th>
<th>Airline/Airline Holiday Companies</th>
<th>None of the Above</th>
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<tbody>
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<td>Total traveller population</td>
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<tr>
<td>Experience Seekers</td>
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<th>Tools:</th>
<th>63% use more than one resource in the planning/booking phase of the customer journey vs 55% other tourists.</th>
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<th>Package versus separate bookings:</th>
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<th>Package bookings:</th>
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<td>Online market places more likely to be used to make package bookings (15%) versus other tourists (10%)</td>
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65% use travel agents IN PERSON throughout the customer journey vs 55% for other tourists
APPENDIX: HOW TO READ THE PEN PORTRAITS
Experience Seekers are the best prospect segment for recovery who want to squeeze the most out of every second on holiday. Willing to spend on travel and experiences, they are passionate about travel, they love discovering new, unique, exciting experiences that they can share with others. They want to get ahead of the curve and be seen as a trailblazer, seeking out immersive experiences that allow them to see, taste and discover unique activities, places and people.

Experience Seekers over-index on potential spend. If we shine the light on the PRIORITY Experience Seekers (highlighted), they represent 13% of global tourists, but a unique sub-segment which over-index on being younger, male and interested in new tourism trends.

PRIORITY Experience Seekers are trend endorsers (vs total):
- Wellbeing involved: 23% (+8%)
- Sustainability engaged: 40% (+19%)
- Inclusion seekers: 40% (+15%)

Likely spend on 10-point scale, where 10 = super Priority and 1 = super budget:
- Total traveller population:
  - Budget Tourists (1-4): 22%
  - Mid-Range Tourists (5-7): 48%
  - Premium Tourists (8-10): 30%
- Experience Seekers:
  - Budget Tourists (1-4): 4%
  - Mid-Range Tourists (5-7): 41%
  - Premium Tourists (8-10): 45%

Provides an overview summarising the segment, what defines them as an international tourist and how to connect with them.

Introduces a key sub-segment of interest – the higher-spending Experience Seekers, including snapshot of their size and unique profile (blue = significantly higher than total population).

The data from which the sub-segment of Priority Experience Seekers are identified (highlighted by the gold box)

A quick snapshot to remind us of any key differences which separate Priority Experience Seekers from the norm (total population).
Average propensity to travel (average on a 10-point scale where 10 = ‘definitely visit’) compared to total population. Blue numbers are significantly higher; red lower.

The top kind of holidays preferred by this segment

This show top influences for Experience Seekers overall. The numbers in the boxes indicate the percentage of respondents who selected these options

The top drivers of destination choice, perceptions of Britain and activity preferences (Top 3 box score where asked on a 10-point scale), Perceptions is based on % who associate this statement with Britain

Key facts on travelling generally, as well as to Britain specifically (of visitors who visited in the past 5 years)

The top destinations based on propensity to visit scores (8.9 or 10 on a 10-point scale), but excluding Britain (biased because we only spoke to considerers of Britain)
EXAMPLE

This chart compares the target segment with the total population of tourists based on the question of what type of tourist they would be if visiting Britain.

The title explains the question responses (as does the legend).

Where blue or red font would be too hard to read, we have used blue or red boxes to indicate significantly higher or lower comparative results. In this case, Priority Experience Seekers had to all respond within the top 3 options of the question scale, which explains why 100% of them are premium tourists!

This chart compares the proportion of holidays generally taken by the target segment compared to those not in that segment. The bigger the difference is in the bar lengths, the more distinctive the segment is – note the use of blue and red numbers to indicate statistically significant differences. The bars are in descending order of size according to the target segment being profiled.

A quick snapshot highlighting sources of inspiration that differ most between the target segment and total population in the market. The numbers in the blue boxes indicate the magnitude of difference.
These indicators are explained in the full MIDAS report, but essentially look at how involved the target segment is when it comes to choosing holidays which fulfil Wellbeing, Sustainability and Inclusion needs. Sizes within the target segment are compared to total population in the market – e.g. 23% are Wellbeing involved and this number is 8 percentage points higher than the total figure (which would be 15%).

Demographic breakdowns should be self-explanatory – once again, look for blue figures which indicate higher skews relative to total population.

The sample is split by either Britain Visitors (have visited in Past 5 Years), or considerers (have not visited Britain in past 5 years, but would consider doing so in next 2 years). As a result, the figures will add to 100%. Data is compared vs total tourist population in the market.

These three sections (drivers, Britain perceptions, activities) illustrate the largest differences vs those not in the target segment in descending order. Absolute percentages are also shown (drivers and activities Top 3 box importance), perceptions are the % believing this statement describes Britain.

Some simple stats and figures on who they travel with is included.

And the countries where the segment has a disproportionately higher propensity to visit (Top 3 box score on a 10-point scale) is shown here alongside the magnitude of the difference versus total population in the market.

The relevant base sizes are indicated at the bottom of the page. Where global weighting is applied, this is explained in the full report, but is based on approximate value contributions from the inbound markets (sourced from IPS data)

### Trend Endorsers (vs Total)

- **Wellbeing Involved**: 23% (+8%)
- **Sustainability Engaged**: 40% (+19%)
- **Inclusion Seekers**: 40% (+15%)

### Living

- 46% have kids, and this is split evenly between kids <12 (50%) and 12yrs+ (50%)

### Key Perceptions of Britain – Highest Differences:

- If I don’t visit soon, I’d miss out (41%)
- Offers good value for money (43%)
- Offers the opportunity to travel sustainably (46%)
- A good place for treating myself (47%)
- A good place for recharging (45%)

### Top Activities (Where Preferences Overindex Most):

- Participate in sport (66%)
- Participate in action and adventure experiences (79%)
- Attend a sporting event (71%)
- Attend a learning course (66%)
- Volunteering (60%)
- Participate in wellness activities (67%)

### Competing with Some More Unique Destinations (vs Global Total)

Disproportionately more likely to consider...

- **Canada (+39%)**
- **Croatia (+36%)**
- **India (+34%)**
- **USA (+31%)**
- **China (+30%)**

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2 in 3 travel with their partner/spouse, but 1 in 3 travel with kids (multiple response data)

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Base size: Priority Experience Seekers n=3,004; Total Tier 1 n=5,893; global weighting applies