Australian Buzzseekers

Foresight – issue 167
VisitBritain Research
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Background and research question

Research background:

• Our recent segmentation research has identified Buzzseekers as a key leisure travellers’ group that VisitBritain wants to target in Australia, in order to increase holiday visits to Britain.
• Buzzseekers in Australia are experienced travellers looking for rewarding holidays whilst exploring the world*.
• This research investigates in more details Australian Buzzseekers’ attitudes towards and image of Britain, and their behaviours when planning and booking mid- and long- haul holidays (including to Britain).

The report is organised around answering these questions:

• How can Britain generate excitement about visiting among Australian Buzzseekers?
• What are the opportunities to communicate during the holiday planning and booking journey?
• What does the holiday look like?
• Are there other challenges and opportunities to create excitement about visiting Britain?

*For more information on those target segments: https://www.visitbritain.org/understanding-our-customers
Research details

**Methodology:** Quantitative online survey sampled from online access panels.

**Target:** Australian Buzzseekers aged 18+, living in Sydney or Melbourne, who have been on a mid- or long-haul international holiday in the previous five years or intend to go in the following 12 months.

**Sample:** 800 respondents.

**Sample structure:** Respondents were excluded from the research if they only travelled/intended to travel to short-haul destinations (Oceania or South East Asia). Respondents were recruited to be representative of Australian Buzzseekers by age and gender. The final data are weighted by age and gender to correct for minor imbalances in the achieved sample. Weighting efficiency is high at 93%. Respondents who had been on a mid- or long-haul holiday in the previous 5 years were asked about their most recent holiday. Those who were planning on going in the next 12 months were asked about their plans for their next holiday. Results are shown together as very few Buzzseekers had not been on an international holiday in the previous 5 years.

**Fieldwork timings:** 23 October – 12 November 2018.
1. Key findings
Key findings

How can Britain generate excitement about visiting among Australian Buzzseekers?

Britain is already a popular and familiar destination for Buzzseekers, which can mean:

- generally positive views of Britain as a holiday destination, especially its cultural heritage, historic buildings and monuments, and contemporary culture.
- but also a lack of excitement about visiting

There are several opportunities to generate more excitement:

Make use of word of mouth from those who have visited already, whose experiences are generally positive; use platforms used by Buzzseekers during their planning and booking journey (e.g. online review websites like TripAdvisor, travel websites and all-in-one travel websites, video sharing services)

Don’t shy away from the fact that Britain is far away, but use the flight as an opportunity to build up excitement about the holiday and as an opportunity for Buzzseekers to relax ahead of a big adventure.

Continue to capitalise on elements that Buzzseekers want from a holiday that they think Britain delivers: cultural attractions, good local food and drink, the ease of getting around, countryside and nature. Make sports more relevant in a holiday context.

Improve perceptions of weather, safety, welcoming people, value for money, variety/new things, areas that are important when deciding where to go on holiday, but where Britain performs less well than general expectations.
Key findings

What are the opportunities to communicate during the holiday planning and booking journey?

There is a lot of overlap between stages of planning and booking holidays and the process starts very early on, sometimes more than a year before the holiday.

Communications should:

- Hook them in early by highlighting activities/things to do when they are researching other elements (e.g. flights).
- Frame Britain as a “must visit” before the flight/package is booked.
- Upsell Britain as a destination to add to the itinerary or to extend their stay by highlighting exciting events and activities. Activities are particularly relevant at an early stage for those booking package holidays: while activities tend to be booked after leaving Australia, looking up activities can start much earlier, thus potentially influencing the final itinerary.

Channels and information delivered should be customised according to the purchase journey stage:

- **Word of mouth** and **online sources** are used throughout. Facebook, YouTube and Instagram could be potential communications partners. **Travel websites** are used when making the big purchases.

  The **VisitBritain website** is key for inspiration and making the itinerary. Continue to invest in content. **Travel blogs/vlogs** can be used to hook those considering visiting Britain.

  Continue to attract Buzzseekers to Britain through traditional sources such as **bricks and mortar travel agents, travel books and magazines**.

  Communicate exciting things to do and visit throughout. As prices and good deals are very important to Buzzseekers, highlight **value for money**.
Key findings

What does their last/next holiday look like?

**Holidays can be very diverse**, either with the family, or on their own. They happen **all year round**, slightly less in September to November. Hotels are the most popular accommodation, and even those visiting friends and family don’t spend all their time with them.

Transport tends to be booked before leaving Australia, and activities are less likely to be booked at all. But when they are, they are usually booked independently, and not part of a package.

**Communications should:**

- Show Britain as a fun and exciting place to visit regardless of who they’re travelling with.
- Show there are activities for all seasons, and communicate them all year round, to coincide with when holiday planning starts.
- Also target those visiting friends and family and influence their itinerary within Britain.

**There is an opportunity to:**

- Continuously grab their attention with exciting activities throughout the booking process.
- Convince them to add Britain as a destination so they don’t miss an exciting event.
- Convince them to pre-book more activities and events before leaving Australia.
Key findings

Are there other challenges and opportunities to create excitement about visiting Britain?

Buzzseekers are likely to be very familiar with Britain, either through having visited in the past, having friends and family in/from Britain or having lived here themselves.

This can lead to a lack of excitement about visiting Britain.

But this sense of familiarity can be challenged:

- While friends and family can help them get around in Britain, don’t assume they will also make Buzzseekers excited about visiting interesting places. Communications should target Buzzseekers directly and help generate excitement before they leave Australia.

- Showcase interesting places that they might have missed in the past, especially as those who lived in Britain only did so for a few months.

- Highlight how easy it is to get to new and unexplored places.
2. How can Britain generate excitement about visiting among Australian Buzzseekers?
How can Britain generate excitement about visiting among Australian Buzzseekers?

• Britain is already a popular destination for Australian Buzzseekers.

• Potentially high levels of familiarity

Generally positive perceptions, especially:
  • cultural heritage
  • historic buildings and monuments
  • contemporary culture
  • More positive perceptions among those who have been on holiday in the last 5 years.

Opportunities:

• Word of mouth from previous visitors can help generate buzz on platforms used during the holiday planning and booking journey (e.g. online review websites like TripAdvisor, travel websites and all-in-one travel websites, video sharing services).

• Sports don’t feature in Buzzseekers’ holiday plans, but we know from this and other research that Britain is perceived as having great sports teams and events. Make sports a bigger element of a holiday.

• When specifically choosing to visit Britain, a few aspects make it more distinctive: the ease of getting around, the possibility of visiting friends and family and having a mix of old and new:
  • Having a mix of old and new could be communicated more to potential visitors
How can Britain generate excitement about visiting among Australian Buzzseekers?

... but also a lack of excitement about visiting Britain

- In a holiday, Buzzseekers look for:
  - cultural attractions
  - good food and drink
  - getting a good deal
  - good weather

- Britain underperforms on some elements that are seen as important when going on holiday and overperforms on some that are not as important for Buzzseekers.

- Continue to capitalise on aspects that are important and Britain is seen as offering: cultural attractions, good local food and drink, the ease of getting around, beautiful countryside.

- Improve perceptions/availability of aspects that are important in a holiday, but Britain is not seen as offering enough: value, weather, safety, welcoming people. Showcase places where Buzzseekers haven’t been before and cultures that are not very similar to Australia.

- Increase the relevance for holidays of aspects not currently important, but that Britain is seen as offering: vibrant cities, having a mix of old and new, parks and gardens, being able to interact with locals in English, contemporary culture, gourmet food and drink, sports, children’s activities.

- The main downsides about visiting, amongst all Buzzseekers and those who have visited, are: weather, costs and Britain being far away:
  - Redefine the flight as an opportunity to relax, do research, build up excitement about Britain.
  - Half of those who have not visited in the last 5 years state reasons that could be challenged with communications.
  - Create excitement by planning an interesting itinerary, showcasing value destinations, especially big cities, mild weather and cultural quirks that can only be found in Britain.
What comes to mind when thinking about Britain as a holiday destination

When thinking about Britain as a holiday destination, landmarks/attractions and landscape/scenery are most top of mind. Mentions are more positive than negative.

Topics (coded)

- Landmarks/attractions: 39%
- General positive mentions: 22%
- Landscape/scenery/outdoors: 19%
- Weather: 17%
- Cities/destinations: 15%
- Food/drinks: 12%
- Monarchy: 12%
- People: 11%
- Culture/literature/music/the arts: 10%
- General negative mentions: 6%
- Traditional/cultural quirks: 4%
- Language/ accent: 3%
- Sport: 3%

Weather is mentioned more by women (21%) and those who say they’re unlikely to visit Britain in the next 5 years (30%).
Proportion who have visited Britain on holiday

- Almost two thirds of Buzzseekers have been to Britain while on holiday at least once. This suggests the potential for a high level of familiarity with Britain, as found in VisitBritain’s Decisions and Influences research*.
- A high level of familiarity can be a barrier for creating excitement about Britain.

Highest among...
- 45+ age group (73%)
- Higher earners (71%)

Lowest among...
- 18-24 age group (58%)
- Those not working (56%)
- Low income (58%)
- Females (59%)

A03. How many times, in total, have you had a holiday of at least 2 nights where one of the countries you visited was Britain? Base = All respondents (800)

*For more information: [https://www.visitbritain.org/britain%E2%80%99s-image-overseas](https://www.visitbritain.org/britain%E2%80%99s-image-overseas) (in 'Further resources' section)
Positive perceptions of Britain

• Britain is well perceived, especially for its culture, historic buildings/monuments and countryside.
• Perceptions among those who have visited Britain in the previous five years are more positive, with the exception of sports.

While those who have visited are more positive about Britain, previous research shows that Buzzseekers are keen to share their experiences, but not on social media. There is potential to use the stories they have to share to influence perceptions of others who have not visited through channels used as inspiration or for making decisions: e.g. reviews on Trip advisor, travel websites, video sharing websites.

From other research we know great sports is usually an advantage for Britain, but it doesn’t seem to translate into a hook for going on holiday.

A02. Thinking about Britain, how much do you agree or disagree with the following?
Base = All respondents (800); Have been on holiday to Britain in last 5 years (183)
Negative perceptions of Britain

- For Buzzseekers, the main downsides of visiting Britain are the weather and costs.
- Amongst those who have visited in the last five years, the length of the journey to get here is also a key downside.

<table>
<thead>
<tr>
<th>Issue</th>
<th>All Buzzseekers</th>
<th>Have been on holiday to Britain in last five years</th>
</tr>
</thead>
<tbody>
<tr>
<td>The weather is bad</td>
<td>40%</td>
<td>43%</td>
</tr>
<tr>
<td>It's too expensive to visit (accommodation, eating out, tourist attractions)</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>The exchange rate is poor</td>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>It's too far/takes too long to get there</td>
<td>30%</td>
<td>40%</td>
</tr>
<tr>
<td>Flights/transport are too expensive to get there</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>The culture is too similar to Australia</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>I prefer to go to other places</td>
<td>11%</td>
<td>19%</td>
</tr>
<tr>
<td>It doesn't offer value for money</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>People in Britain are not welcoming</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>I don't like the food</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>I don't know what there is to do in Britain</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>There is nothing interesting to do there</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>There is nothing fun to do there</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>None, can't think of any downside</td>
<td>13%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Barriers related to flight duration could be challenged through partnerships with airlines (e.g. communications on in-flight entertainment).
Make the flight there seem like the perfect opportunity to relax ahead of a big adventure.
In-flight magazines can further build up excitement before the holiday.

Lack of knowledge is not a strong barrier to visiting Britain.

Statistically higher/lower than total, tested at 95% CL
Looking for in a holiday in general

- Cultural attractions
- Good local food and drink
- A good deal e.g. on flights, total holiday package
- Good weather
- The ease of getting around
- Countryside and natural beauty
- Somewhere that is safe/secure
- Affordable cost of staying in the destination
- A wide variety of places to visit around the country
- Somewhere I’d never been before
- A culture that is different from our own
- To have a wide range of holiday activities
- Open/welcoming people
- A vibrant capital city/London
- To have a mix of old and new
- Vibrant cities outside the capital
- The ease of getting to the country
- Outdoor leisure pursuits
- Varied and high quality accommodation
- Possibility of visiting friends or relatives
- Parks and gardens to visit
- Somewhere where they speak English
- Festivals
- Contemporary culture
- Theme parks, zoos
- Gourmet/world class food and drink
- Exciting sports events
- Somewhere easy to visit with children
- Hands-on learning activities

Britain doesn’t offer

Britain offers

- +2%
- -1%
- -15%
- -27%
- -2%
- +4%
- -5%
- -17%
- -12%
- -14%
- -3%
- -6%
- +14%
- +7%
- +6%
- +2%
- +0%
- +4%
- +11%
- +22%
- +4%
- +10%
- +7%
- +11%
- +11%
- +3%

What Buzzseekers look for in a holiday

- When going on holiday, Buzzseekers mostly look for cultural attractions, good food and drinks, a good deal, and good weather. Britain overperforms on attributes which are less commonly looked for, but underperforms on some that are more important.

Continue communicating cultural attractions, good food and drink and the ease of getting around, which are important attributes that Buzzseekers look for in a holiday and think Britain offers.

Improve perceptions/availability: value, weather, safety, welcoming people.

Showcase places they haven’t been to before, cultures that are not similar to Australia.

Increase relevance for holidays, show how these elements can mean a good, fun holiday: vibrant cities, a mix of old and new, parks and gardens, being able to interact with locals in English, contemporary culture, gourmet food and drinks, sports, children’s activities.

Shown: differences between how many Buzzseekers say they look for each element when deciding where to go on holiday and how many say Britain offers that element

▲▲ Statistically higher/lower than total, tested at 95% CL
Main reasons for travelling

• For most Buzzseekers, having a holiday was the main reason for travelling on this occasion, with one in three saying they travelled to visit family or friends.

• Having a holiday is still the most important reason for visiting Britain, but the trip is more likely to be linked with a range of other reasons. This suggests Britain is not necessarily an exciting destination in itself.

Main reasons for travelling (All Buzzseekers)

- To have a holiday: 84%
- To visit family: 33%
- To visit friends: 30%
- For a specific family/friend's event (e.g. wedding): 13%
- For another event (e.g. sports event, concert): 8%
- For business: 7%
- To study: 3%
- To work: 2%
- Other: 0%

Main reasons for visiting Britain (All visiting Britain)

- To have a holiday: 68%
- To visit family: 37%
- To visit friends: 33%
- For a specific family/friend's event (e.g. wedding): 12%
- For another event (e.g. sports event, concert): 12%
- For business: 8%
- To study: 4%
- To work: 3%
- Other: 1%

Men are more likely to visit friends (34%).

25-34s are more likely to visit friends (35%) or go for a specific family/friend’s event (16%). Those aged 45+ are more likely to go to have a holiday (93%).

Those on holiday with children are more likely to visit family (47%).

▼▲ Statistically higher/lower than total, tested at 95% CL
Britain’s role in the travel itinerary

- Amongst Buzzseekers visiting Britain and at least one other country, visiting Britain is an important reason to travel, but few say it is the only reason, suggesting a lack of excitement about visiting Britain.
- A sizeable minority (29%) say Britain is only a transit point, more than say it was the main reason to travel (12%).

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Britain was/is the main reason I travelled/will travel</td>
<td>12%</td>
</tr>
<tr>
<td>Visiting Britain was/is one of the main reasons I travelled/will travel, but not the only one</td>
<td>41%</td>
</tr>
<tr>
<td>Britain was/will be mainly a transit point, but I also wanted/want to visit</td>
<td>16%</td>
</tr>
<tr>
<td>Britain was/will be just a transit point for my holiday (e.g. a convenient place to land, get adjusted to the time zone)</td>
<td>29%</td>
</tr>
</tbody>
</table>
Main reasons for visiting Britain

• Cultural attractions are the main reason Buzzseekers choose to visit a country, including Britain. Britain also stands out as easy to get around, offering the possibility of visiting friends/relatives, safety/security and having a mix of old and new.

<table>
<thead>
<tr>
<th>Top 10 reasons for visiting other countries</th>
<th>Top 10 reasons for visiting Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural attractions e.g. historic buildings and famous sights</td>
<td>Cultural attractions e.g. historic buildings and famous sights</td>
</tr>
<tr>
<td>Good local food and drink (bars, pubs, restaurants)</td>
<td>A vibrant capital city/London</td>
</tr>
<tr>
<td>A culture that is different from our own</td>
<td>The ease of getting around</td>
</tr>
<tr>
<td>Good weather</td>
<td>Possibility of visiting friends or relatives</td>
</tr>
<tr>
<td>A wide variety of places to visit around the country</td>
<td>Somewhere that is safe/secure</td>
</tr>
<tr>
<td>Countryside and natural beauty</td>
<td>Good local food and drink (bars, pubs, restaurants)</td>
</tr>
<tr>
<td>A vibrant capital city</td>
<td>Countryside and natural beauty</td>
</tr>
<tr>
<td>To have a wide range of holiday activities</td>
<td>To have a mix of old and new</td>
</tr>
<tr>
<td>Affordable cost of staying in the destination</td>
<td>A wide variety of places to visit around the country</td>
</tr>
<tr>
<td>Somewhere I'd never been before/go somewhere new</td>
<td>To have a wide range of holiday activities</td>
</tr>
</tbody>
</table>

Top reasons for Buzzseekers are similar to all Australians (based on Decisions and Influences research), but visiting friends and family seems to be a lower priority for Buzzseekers than it is for all Australians.

Britain is already perceived as offering a mix of old and new by almost a third of visitors to Britain. This aspect could be communicated more to potential visitors.

For those on holiday with children, it is more important when choosing a country to be easy to visit with children (34%) and having theme parks, zoos (30%).

B04. Now thinking about your holiday in general, which of the following were/would be the most important reasons why you chose to visit/for you to visit …? Base = All except those only visiting Britain (770)
B05. Which of these were the most important reasons why you chose to visit Britain on this occasion? Base = All visiting Britain (125)
Reasons for not visiting Britain

- The top reasons for not visiting Britain on their last/next international holiday relate to convenience, cost and generally preferring to go elsewhere. Yet a third state as reasons impressions that could potentially be changed through targeted communications.

- It was not convenient this time: 29%
- I prefer to go to other places: 26%
- It's too expensive to visit (accommodation, eating out, attractions): 25%
- Flights/transport are too expensive to get there: 23%
- It's too far/takes too long to get there: 20%
- The exchange rate is poor: 19%
- The weather is bad: 18%
- It doesn't offer value for money: 16%
- The culture is too similar to Australia: 12%
- I've been there before and don't want to visit again: 11%
- People in Britain are not welcoming: 9%
- There is nothing interesting to do there: 8%
- There is nothing fun to do there: 7%
- I don't like the food: 6%

50% state impressions that could potentially be changed through messaging.

Potential to communicate:
- value destinations outside London, especially large cities
- mild weather in South of England
- cultural quirks/traditions that can only be found in Britain

B07. And can we check, why did/will you not visit Britain (England, Wales, Scotland) on this occasion? Not shown: Other (2%)/ None (11%)
Base = All not visiting Britain (678)
3. What are the opportunities to communicate during the holiday planning and booking journey?
What are the opportunities to communicate during the holiday planning and booking journey?

- There is considerable overlap between stages of planning and booking
  - Looking up/booking activities often happens before booking accommodation
  - Most decisions are made more than 3 months before travelling

- First moment in the purchase journey: booking the holiday package / the flight; some start by booking activities.

**Communications opportunities**

- Activities/things to do are often booked alongside other elements (e.g. flights) so they could be highlighted throughout (e.g. ‘hot tickets’, ‘must do’)

- The ideal is to highlight Britain as a ‘must visit’ before the flight/package is booked

- After holiday packages/flights have been booked, there is opportunity to up sell: adding Britain to the itinerary, extending their stay in Britain, visiting other places in Britain, adding other activities

- ‘Mix & match’ and ‘package plus’ travellers seem to be easiest to ‘hook in’ at an early stage (with pre-booked activities, etc.)
What are the opportunities to communicate during the holiday planning and booking journey?

- **Friends and family and online sources**: important sources of information throughout the planning process.
- **Travel websites** used throughout, but more prominent when making the ‘big’ bookings.

  - Customise channels and types of information according to purchase journey stage (e.g. travel websites when making big purchases to convince them to add Britain to itinerary)
  - TripAdvisor and positive word of mouth are key at all stages (capitalise on the positive perceptions of other Buzzseekers who have already been, as they seem to like it!)

**Buzzseekers coming to Britain:**

- use **tourism board sites** during the inspiration stage and for making the itinerary.
- consult **traditional sources** (books, magazines, travel books) for inspiration.
- are more likely to use travel blogs/vlogs for inspiration, but less likely when making decisions.

  - The VisitBritain site is key to Buzzseekers, continue to invest in content.
  - Continue to attract Buzzseekers to Britain through traditional sources such as bricks and mortar travel agents, travel books and magazines, but also use travel blogs/vlogs to inspire them.

**What to communicate:**

- What to do/where to go throughout their booking process.
- Value, especially when making the decision and ‘big’ bookings.
- Information on arts events for daily inspiration while on holiday; Instagram and Pinterest used more by those coming to Britain.
Timings of purchase journey

- There is considerable overlap between stages of planning and booking. Deciding the final itinerary can happen at the same time as booking elements (the holiday/flights/accommodation) and at the same time as researching activities.
- Most decisions are made more than 3 months before travelling.
- Patterns are very similar for visitors to Britain.

Longer holidays tend to be planned more in advance than shorter holidays.

### Table: Timings of purchase journey

<table>
<thead>
<tr>
<th>N=</th>
<th>800</th>
<th>800</th>
<th>800</th>
<th>800</th>
<th>800</th>
<th>627</th>
<th>450</th>
<th>450</th>
<th>800</th>
<th>800</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 12 months before</td>
<td>24%</td>
<td>17%</td>
<td>12%</td>
<td>11%</td>
<td>8%</td>
<td>8%</td>
<td>6%</td>
<td>5%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>12 to 6 months before</td>
<td>34%</td>
<td>33%</td>
<td>29%</td>
<td>29%</td>
<td>21%</td>
<td>27%</td>
<td>27%</td>
<td>21%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>3 to 6 months before</td>
<td>26%</td>
<td>31%</td>
<td>36%</td>
<td>34%</td>
<td>34%</td>
<td>36%</td>
<td>37%</td>
<td>38%</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td>1-2 months before</td>
<td>10%</td>
<td>12%</td>
<td>16%</td>
<td>18%</td>
<td>22%</td>
<td>19%</td>
<td>20%</td>
<td>22%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Less than a month before</td>
<td>4%</td>
<td>5%</td>
<td>5%</td>
<td>7%</td>
<td>12%</td>
<td>8%</td>
<td>8%</td>
<td>11%</td>
<td>14%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Packages or flights are booked first.

B11. How long before you went/you are due to go on holiday did you (or will you) do each of these things? Not shown: Don’t know (2-5%)
Base = All respondents (800), all who booked some holiday elements together (627), all who booked some elements separately (450)
**Succession of bookings**

- Booking the holiday package or flights tend to come first. Booking accommodation seldom comes first in the process.
- Almost one in five booking package holidays start with booking activities (though fewer of those booking all arrangements separately).

<table>
<thead>
<tr>
<th>Start booking the holiday</th>
<th>Package/all arrangements booked together</th>
<th>Mix - some booked together, some as a package</th>
<th>All arrangements booked separately</th>
</tr>
</thead>
<tbody>
<tr>
<td>81%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start booking flights</td>
<td>46%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start booking accommodation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Book/start booking activities to do while on holiday</td>
<td>19%</td>
<td>12%</td>
<td>3%</td>
</tr>
</tbody>
</table>

B11a. In which order did you do these things? First
Base: All who remember when they booked holiday elements (334/286/160)
Opportunities to communicate

Top 3-4 most used sources of information:

**INSPIRATION**
To inspire you or give you ideas before you have decided which country/ies to visit
- Friends, family and colleagues I know
- Online reviews (e.g. TripAdvisor)
- Travel websites
- Video sharing services (YouTube, Vimeo)

**MAKING THE DECISION**
Deciding on a destination or series of destinations for your journey
- Friends, family and colleagues I know
- Online reviews (e.g. TripAdvisor)
- Travel websites

**MAKING THE ‘BIG’ BOOKINGS**
Booking flights/transport and accommodation
- All-in-one travel websites
- Travel websites
- Travel agents in person or by phone

**MAKING THE ITINERARY**
Giving you ideas and helping you plan and book the things to do while you are there
- Friends, family and colleagues I know
- Online reviews (e.g. TripAdvisor)
- Travel websites
- All-in-one travel websites

**DAILY INSPIRATION AND SUPPORT ON THE HOLIDAY**
Giving you ideas or helping you get the most while you are on your holiday
- Friends, family and colleagues I know
- Online reviews (e.g. TripAdvisor)
- Facebook/other social/digital media posts/blogs

Top 3 most looked up types of information:

- **Information:**
  - **Things to do**
  - **Places to visit**
  - **Prices**

- **Information:**
  - **Places to visit**
  - **Prices**
  - **Places to stay**

- **Information:**
  - **Prices**
  - **Places to visit**
  - **Places to stay**

- **Information:**
  - **Things to do**
  - **Places to visit**
  - **Prices**
  - **Places to stay**

- **Information:**
  - **Things to do**
  - **Places to visit**
  - **Arts events**
Sources of information

• Buzzseekers use a large mix of information sources. Friends and family and online sources are key for inspiration, while travel websites and travel agents are consulted more when deciding and booking. Those visiting Britain are more likely to use travel blogs/vlogs for inspiration, but less likely when making the decision.

B12. Which of these did you use for each of these stages of planning and booking your holiday?
Base: All respondents (800)

<table>
<thead>
<tr>
<th>Source</th>
<th>Inspiration</th>
<th>Making the decision</th>
<th>Making the 'big' bookings</th>
<th>Making the itinerary</th>
<th>Daily inspiration on the holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friends, family and colleagues I know</td>
<td>30%</td>
<td>29%</td>
<td>20%</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>Online reviews (e.g. Tripadvisor)</td>
<td>26%</td>
<td>27%</td>
<td>22%</td>
<td>24%</td>
<td>16%</td>
</tr>
<tr>
<td>Travel websites</td>
<td>26%</td>
<td>18%</td>
<td>15%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Video sharing services (YouTube, Vimeo)</td>
<td>26%</td>
<td>18%</td>
<td>15%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Travel brochures, leaflets</td>
<td>25%</td>
<td>22%</td>
<td>16%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Facebook or other social media advertising</td>
<td>24%</td>
<td>16%</td>
<td>14%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>TV, streaming, TV on demand/catch-up services</td>
<td>23%</td>
<td>17%</td>
<td>15%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Books, magazines</td>
<td>23%</td>
<td>17%</td>
<td>14%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Online travel blogs/vlogs</td>
<td>23%</td>
<td>21%</td>
<td>14%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>All-in-one travel websites</td>
<td>23%</td>
<td>26%</td>
<td>14%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Facebook/other social/digital media posts/blogs</td>
<td>23%</td>
<td>19%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Instagram or Pinterest images</td>
<td>22%</td>
<td>16%</td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Tourism board sites or resource centres</td>
<td>22%</td>
<td>19%</td>
<td>17%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Travel books, like Lonely Planet</td>
<td>21%</td>
<td>19%</td>
<td>17%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Travel agents in person or by phone</td>
<td>17%</td>
<td>22%</td>
<td>16%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Hotel alternatives such as AirBnB</td>
<td>17%</td>
<td>17%</td>
<td>16%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Celebrity/trusted expert endorsement</td>
<td>17%</td>
<td>15%</td>
<td>13%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>None</td>
<td>9%</td>
<td>9%</td>
<td>10%</td>
<td>10%</td>
<td>12%</td>
</tr>
</tbody>
</table>
4. What does their last/next long-haul holiday look like?
What does the holiday look like?

- **Half of Buzzseekers travel with their partner**, a quarter travel alone at least for part of the holiday and a quarter travel with children.

- **Holidays take place all year round**, somewhat less in September-November.

- **Hotels/motels/resorts** are the most common accommodation types.
  - Visiting friends was an important factor for visiting Britain, but no more so than other countries.

- Activities while in Britain and elsewhere are **visiting cultural attractions, large cities, parks and gardens**.
  - These tend to be **booked independently**, and not as part of a package.

- While transport is usually booked before leaving Australia, **tickets for events and activities** are less likely to be purchased at all.

Communications should show that Britain can be a desirable holiday destination with the family, with friends or on their own.

Communications should also be all year round and showcase activities for each season.

There is the opportunity to influence Buzzseekers’ itineraries and activities even if they’re visiting friends and family.

As Buzzseekers look up activities up to a year before going on holiday (sometimes before booking accommodation), continuously grab their attention with interesting events and activities. Those not visiting Britain could be convinced to add it as an additional destination in order to go to an exciting event.

Hook in Buzzseekers by getting them to pre-book more activities, and book them before leaving Australia.
Travel companions

- Half of Buzzseekers travel with their spouse/partner. One in three travel on their own for at least part of the holiday and a quarter travel with children. The pattern is similar for Buzzseekers visiting Britain.

- Companions can influence what a holiday looks like (e.g. travelling with children as seen in the previous section impacts on what Buzzseekers prioritise). Communications should show Britain as a place that Buzzseekers can visit with their family or on their own.

52% With spouse/partner

29% On own, for parts of the holiday or the entire holiday

24% With children aged under 16

14% With other adult family members living in Australia

13% With friends living in Australia

7% With other adult family members living in the country/countries I visited/ I'm visiting

5% With other adult family members living elsewhere

4% With friends living in the country/countries I visited/ I'm visiting

4% With friends living elsewhere

4% Part of a tour group

B14. Who, if anyone, did/will you travel with on this occasion? Base = All respondents (800)
Travel companions (2)

- Most Buzzseekers travelled with the same people for the entire time. Those visiting Britain are more likely to be joined by someone for part of the holiday.
- One in ten were joined for parts of the holiday by others living in Australia.

80% travel with companions at some point of their trip

How long did they join for?
- The same person/persons during the entire holiday
- One or more persons joined/will join for only part of the holiday

<table>
<thead>
<tr>
<th></th>
<th>All Buzzseekers</th>
<th>All travelling to Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>The same person</td>
<td>72%</td>
<td>74%</td>
</tr>
<tr>
<td>One or more persons</td>
<td>15%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Where do those people joining for parts of the holiday live?

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Living in Australia</td>
<td>11%</td>
</tr>
<tr>
<td>Living in or near a place you were/are visiting</td>
<td>6%</td>
</tr>
<tr>
<td>Living elsewhere, not close to where you were/are visiting</td>
<td>3%</td>
</tr>
</tbody>
</table>

B015. Did/Will you travel with the same person/persons during the entire holiday, or did/will one or more persons join you for only part of your holiday? Base = All respondents (800), all who travelled to Britain (122)

B016. And can we check, the person or persons joining for only part of the holiday are ...? Base = All respondents (800)
Season

- Holidays are evenly split across most of the year, but fewer are in October-December. The same pattern is found for holidays to Britain.

Buzzseekers start thinking about going on holiday and researching 6 to 12 months before going on holiday (some even earlier), suggesting that a holiday that is happening during Australian winter can be influenced starting with July the previous year.

The final destinations are decided 3 to 12 months before, suggesting the need for year round communications.

B16b. When did/will your holiday start? Please select the month of the first journey you took/will take during your holiday.
Base = All respondents (800)
Length of entire holiday

- Holiday length ranges substantially, but two in five are 15 nights or longer.
- Holidays to Europe tend to be longer, while those to Oceania and Asia are shorter.

Visits to Europe …
are longer: 53% are 15+ nights.

Visits to Oceania …
are shorter: 55% are 1-7 nights.

Visits to Asia …
are shorter: 35% are 1-7 nights.
Length of stay in Britain

- Buzzseekers visiting Europe tend to stay longer than average. On average, about half of days in Europe are spent in Britain.

<table>
<thead>
<tr>
<th>How long was your holiday/will your holiday be in total?</th>
<th>How long in total did/will you spend in Britain?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All Buzzseekers</strong></td>
<td><strong>Visiting Europe</strong></td>
</tr>
<tr>
<td>Average number of nights</td>
<td>20 nights</td>
</tr>
<tr>
<td></td>
<td>24 nights</td>
</tr>
<tr>
<td>1 2 3 4 5 6 7</td>
<td>1 2 3 4 5 6 7</td>
</tr>
<tr>
<td>8 9 10 11 12 13 14</td>
<td>8 9 10 11 12 13 14</td>
</tr>
<tr>
<td>15 16 17 18 19 20 21</td>
<td>15 16 17 18 19 20 21</td>
</tr>
<tr>
<td>22 23 24 25 26 27 28</td>
<td>22 23 24 25 26 27 28</td>
</tr>
<tr>
<td>29 30</td>
<td>29 30</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Visiting Britain</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>12 nights</td>
</tr>
<tr>
<td></td>
<td>1 2 3 4 5 6 7</td>
</tr>
<tr>
<td></td>
<td>8 9 10 11 12 13 14</td>
</tr>
<tr>
<td></td>
<td>15 16 17 18 19 20 21</td>
</tr>
<tr>
<td></td>
<td>22 23 24 25 26 27 28</td>
</tr>
<tr>
<td></td>
<td>29 30</td>
</tr>
</tbody>
</table>

B17. How long was your holiday/will your holiday be in total? Please count the number of nights spent abroad. Base = All visiting other countries not only Britain (770)/All visiting Europe except only Britain (274)

B18. How long in total did/will you spend in Britain (England, Wales, Scotland)? Base = All visiting Britain (122)
Accommodation

- Most Buzzseekers stay in hotels/motels/resorts while on holiday, and one in three stay with friends or family. The same pattern applies for those visiting Britain.

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>While on Holiday</th>
<th>While in Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel / motel / resort</td>
<td>65%</td>
<td>60%</td>
</tr>
<tr>
<td>Friend or family member's property (at no charge)</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>Rented house, apartment, unit, holiday flat (including Air BnB)</td>
<td>20%</td>
<td>23%</td>
</tr>
<tr>
<td>Bed &amp; Breakfast / guest house</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Traditional accommodation option at destination (e.g. castle)</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Unique accommodation experience (e.g. glamping, yurt, igloo etc.)</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Hostel</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Cruise ship</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Own holiday house</td>
<td>8%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Hostels are used more by younger Buzzseekers:
- 18-24: 14%
- 25-34: 13%

Buzzseekers aged 45+ are more likely to go on cruise ships (14%) or stay in hotels (82%).

▼ ▲ Statistically higher/lower than total, tested at 95% CL
Activities

• The most common activities while on holiday, in Britain or elsewhere, are visiting large cities, visiting cultural attractions and visiting parks and gardens. Visitors coming to Britain are less likely to visit theme parks and zoos than those elsewhere.

While on holiday
- Visit large cities: 61%
- Visit cultural attractions: 60%
- Visit parks or gardens: 50%
- Visit the countryside: 47%

While in Britain
- Book a table at a local restaurant/food festival: 47%
- Book a table at an iconic restaurant: 35%
- Visit theme parks, zoos: 35%
- Go to contemporary culture events: 28%
- Go to festival(s) (e.g. music, arts, culture): 26%
- Attend sports events: 18%
- Take part in hands-on learning activities: 17%

The majority of visitors to Britain booked the activities they did independently, not as part of a package.

- (results not shown as base sizes are very small but results are consistent for each activity).
Booking transport and activities

- Flights, airport transports and train travel between countries tend to be booked before leaving Australia. People visiting Britain are more likely to hire a car before leaving (49% v 39% average). Tickets for tourist attractions are booked mostly after leaving Australia, but over a third book them before leaving, suggesting a potential opportunity to increase bookings before leaving.

- Tickets for arts and sports events and tours are less likely to be purchased at all. But British sports is highly regarded, suggesting a potential advantage over other countries.
5. Are there other challenges and opportunities to create excitement about visiting Britain?
Are there other challenges and opportunities to create excitement about visiting Britain?

**Buzzseekers are fairly familiar with Britain:**
- a majority have friends or family living in or from Britain
- two thirds have been to Britain on holiday at least once
- a quarter have lived here

- While this can be an asset, and can lead to positive perceptions of Britain, it can also be a barrier if Buzzseekers feel they know Britain too well and there is nothing new to discover.
- Friends and family can help them move around, but they shouldn’t be relied on to generate excitement.

**A quarter say they have lived in Britain, but only for a few months.**
- Show previous visitors and those who lived in Britain that they missed out on unique experiences.

**Large cities, such as London and Manchester, are the most attractive to Buzzseekers.**
- Attract repeat visitors by pointing out there are other places to go and how easy they are to get to.
Friends and family in/from Britain

- A majority of Buzzseekers have a connection with Britain through friends and family.
- This can be an opportunity to link visiting friends and family with a holiday, but it also means Buzzseekers are familiar with Britain and might think there is nothing new to explore.

C02 Which, if any, of the following apply to you?
Base = All respondents (800)
Living in Britain

- Almost a quarter say they have lived in Britain in the past. Of these, a third were very short-term stays, of up to two months.

<table>
<thead>
<tr>
<th>How long did you live in Britain?</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 2 months</td>
<td>34%</td>
</tr>
<tr>
<td>2 to 5 months</td>
<td>26%</td>
</tr>
<tr>
<td>5 months to a year</td>
<td>20%</td>
</tr>
<tr>
<td>1-2 years</td>
<td>20%</td>
</tr>
<tr>
<td>3-4 years</td>
<td>20%</td>
</tr>
<tr>
<td>5+ years</td>
<td>20%</td>
</tr>
</tbody>
</table>

While they might feel they know Britain (according to Decisions and Influences), this is an opportunity to show them the things they missed last time they were in Britain.

C03 Have you ever lived in Britain yourself? C05. Still thinking about Britain, which of these things, if any, have you ever done there? Base = All respondents (800)

C04 How long did you live in Britain?
Base = All who lived in Britain (174)
Visiting Britain in the next 5 years

- Almost all Buzzseekers say they will go on an international holiday and two thirds that they will definitely or probably visit Britain in the next five years.
- Intention to visit is particularly high amongst those who have already visited.

**Go on an international holiday**

- **Definitely will**
  - 62%
- **Probably will**
  - 28%
- **Might or might not**
  - 9%
- **Probably won’t**
  - 2%
- **Definitely won’t**
  - 6%

**VisitBritain**

- **Definitely will**
  - 34%
- **Probably will**
  - 32%
- **Might or might not**
  - 22%
- **Probably won’t**
  - 7%
- **Definitely won’t**
  - 6%

66% definitely/probably will visit Britain

Those who have interacted with Britain in the past are more likely to say they will visit again:

- have been on holiday to Britain in the last 5 years (80%)
- have friends/family living in/from Britain (75%)
- have lived in Britain (73%)
- have worked in Britain* (76%)
- studied in Britain* (79%)
- have been to Britain on a working visa* (82%)

**Also more likely to say they will visit:**

- Buzzseekers with children (73%)
- those working full time (73%)

---

E04. How likely are you to go on an international holiday in the next 5 years? By international holiday we mean one where you are away from home for two or more nights. Base = All respondents (800); C06. How likely are you to visit Britain (again) in the next 5 years? Base = All except intenders who will visit Britain on next trip (789)

GfK Truth Index*

54% are actually likely to go on an international holiday and 34% are likely to visit Britain in the next 5 years

*GfK Trust Index is a composite that controls for respondents’ tendency to overestimate their likelihood to act in the future.
Places visited/to visit in Britain

- London is by far the most visited place in Britain.
- Other places that Buzzseekers have or intend to visit tend to be large cities, like Manchester, Liverpool, Edinburgh, but also Oxford and Cambridge.

**Visited (Have been to Britain in last five years)**

- **England (Net):** 96%
  - London: 91%
  - Manchester: 34%
  - Liverpool: 30%
  - Oxford/Cambridge: 28%
  - Windsor: 19%
  - Countryside in North of England/Yorkshire/Derbyshire/Lake District: 18%
  - York: 17%
  - Bristol: 16%
  - Bath/Cotswolds: 16%
  - Brighton: 12%
  - South West: Devon/Cornwall: 11%
  - Other places in England: 8%
  - Wales (Net): 11%
  - Cardiff: 9%
  - Snowdonia: 3%
  - Scotland (Net): 29%
  - Edinburgh: 22%
  - Glasgow: 17%
  - Scottish Highlands/Inverness/Loch Ness: 15%
  - Other Places in Scotland: 1%

**Intend to visit (Intend to visit Britain in next five years)**

- **England (Net):** 87%
  - London: 78%
  - Manchester: 33%
  - Liverpool: 28%
  - Oxford/Cambridge: 23%
  - Windsor: 19%
  - Countryside in North of England/Yorkshire/Derbyshire/Lake District: 17%
  - York: 14%
  - Bristol: 11%
  - Bath/Cotswolds: 12%
  - Brighton: 10%
  - South West: Devon/Cornwall: 9%
  - Other places in England: 1%
  - Wales (Net): 11%
  - Cardiff: 10%
  - Snowdonia: 5%
  - Scotland (Net): 35%
  - Edinburgh: 23%
  - Glasgow: 20%
  - Scottish Highlands/Inverness/Loch Ness: 17%
  - Other Places in Scotland: 0%

Generate interest in less visited locations by showing off exciting tourist attractions and highlighting the ease of getting there (important to Buzzseekers and already seen as something Britain offers).

London and Manchester are also the most popular as repeat destinations: 83% would re-visit London and 70% Manchester.

C01. Which of these places did/will you visit while in Britain? Base: All who visited Britain in last 5 years or intend to in next 12 months (196)

C07. Which of these are you likely to visit (again) in the next 5 years? Base: All intending to visit Britain in next 5 years, but not on next holiday (745)
Appendix:
Media consumption and sample characteristics
Media consumption patterns

Time spent online during a usual week

- Up to 5h: 18%
- 5-8h: 16%
- 8-10h: 16%
- 10-20h: 18%
- 20-30h: 13%
- 30+h: 16%
- Don’t know: 2%

Visited every/most days
- Facebook: 72%
- YouTube: 63%
- Instagram: 49%
- Snapchat: 23%
- Twitter: 21%
- TripAdvisor: 19%
- Pinterest: 18%
- Blogs: 12%
- Buzzfeed: 9%
- None of these: 5%

Commonly visited social media platforms can be communications partners.

Used every/most days
- Broadcast TV: 42%
- Catch-up TV or Video on Demand: 27%
- Radio: 41%
- Radio through an app or streaming site: 18%
- Regional newspapers (print): 14%
- Regional newspapers (online): 14%
- National newspapers (print): 18%
- National newspapers (online): 23%
- Magazines (print): 15%
- Magazines (online): 13%
- Online news websites: 32%
- None of these: 13%

Any TV: 54%
Any Radio: 51%
Regional newspapers: 24%
National newspapers: 34%
Magazines: 23%
Any online media: 67%

E06. Approximately how many hours in total do you spend actively using the Internet in a normal week? E07. Which, if any, of these do you visit every day or on most days? E08. And which, if any, of these do you use every day or most days?
Base = All respondents (800)/ All who go online (774)
Demographics

Women, 48%  Men, 52%

Sydney, including suburbs – 51%
Melbourne, including suburbs – 49%

Age

18-24  21%
25-34  33%
35-44  25%
45+    21%

Working status

Working full-time  62%
Working part-time  20%
In full time education  5%
Unemployed & seeking work  2%
Not working - other reason  4%
Retired  4%

Household composition

1 adult  20%
2 adults  54%
3+ adults  26%

Household income

Low (below 52k/year)  17%
Medium (52-104k/year)  42%
High (104k or more/year)  31%
Prefer not to say  9%

Please note: data has been weighted on gender and age. Weighted percentages are shown.

S04. Are you ... ? S03. Could you tell us your age? E09. Of the people in your household including yourself, how many members are ... ? S01. To start, could you tell us where you live? E10. Which of these best applies to you personally? E11. What is your household income before tax (including superannuation contributions, commissions, salary sacrifice and any other automatic deductions)? Base = All respondents (800)
Previous international holidays 1/2

• Most Buzzseekers in the sample have been on an international holiday in the last 12 months and a majority have been on a long-haul holiday (Please note, sample was selected to have been on mid- or long-haul holiday in last 5 years or intend to go in next 12 months).

E01. In the last 12 months, approximately how many international holidays have you taken? Base = All respondents (800)

E02. And for how many of those international holidays on how many did you have to take a flight of 10 hours or more? Base = All respondents (800)
Where do Buzzseekers go on holiday?

- Amongst Buzzseekers who have been on a mid- or long-haul holiday in the last 5 years, Asia and Europe are the most commonly visited destinations. A quarter of Buzzseekers say they have visited Britain in the last five years. Respondents were excluded if they had only been/only intended to go on a short-haul-holiday*.

S06. To which of these did you go on holiday of at least two nights in the last 5 years? *to Oceania or South East Asia only

Base = All who have been on a mid- or long-haul international holiday in last 5 years (746)
Where was their last international holiday?

• On their last international holiday, a quarter have been to the US. Japan and Britain also featured in the last holiday. Most of those who visited Britain also visited at least one other country.

- United States of America: 25%
- Japan: 16%
- Britain: 15%
- Italy: 12%
- Indian subcontinent: 10%
- China: 10%
- Germany: 10%
- France: 10%
- South East Asia: 8%
- Canada: 6%
- New Zealand: 5%
- South Korea: 5%
- Gulf: 5%
- Spain: 5%
- Other European country: 5%

15% travelled to Britain on their last international holiday:

► 11% travelled to at least one other country apart from Britain
► 4% travelled to Britain only

% visiting Britain and ... on the same last holiday:
- Italy 4%
- Germany 3%
- Ireland 3%
- Japan 3%
Previous international holidays 2/2

- They tend to spend between $3,000 and $15,000 on international holidays per year.

<table>
<thead>
<tr>
<th>Spent in last 12 months</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to $2,999</td>
<td>13%</td>
</tr>
<tr>
<td>$3,000 - $4,999</td>
<td>19%</td>
</tr>
<tr>
<td>$5,000 - $9,999</td>
<td>26%</td>
</tr>
<tr>
<td>$10,000 - $14,999</td>
<td>16%</td>
</tr>
<tr>
<td>$15,000-$19,999</td>
<td>9%</td>
</tr>
<tr>
<td>$20,000+</td>
<td>11%</td>
</tr>
<tr>
<td>Don't know</td>
<td>6%</td>
</tr>
</tbody>
</table>
Australian Buzzseekers

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