EXPERIENCE SEEKER PEN
PORTRAITS

Source: MIDAS, VisitBritain/Kubi Kalloo, fieldwork March-April 2022

Markets: Australia, Canada, China, European Markets Combined, France, GCC, Germany, India, Italy, Netherlands & Saudi Arabia, Spain, UAE, USA.
AUSTRALIA EXPERIENCE SEEKERS
**AUSTRALIA EXPERIENCE SEEKERS (26%)**

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 but PRIORITY Experience Seekers are a smaller segment in Australia vs other markets (13%) representing 9% of Australian tourists. It is a unique sub-segment which over-indexes on males and younger tourists, particularly 18-34 yrs.

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget

<table>
<thead>
<tr>
<th></th>
<th>Australia total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Tourists (1-4)</td>
<td>23%</td>
<td>47%</td>
</tr>
<tr>
<td>Mid-Range Tourists (5-7)</td>
<td>54%</td>
<td>47%</td>
</tr>
<tr>
<td>Premium Tourists (8-10)</td>
<td>23%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Priority Experience Seekers are trend endorsers (vs total):

Wellbeing involved 22% (+3%)
Sustainability engaged 10% (+1%)
Inclusion seekers 26% (+1%)

**GENDER**

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>42%</td>
<td>58%</td>
<td></td>
</tr>
</tbody>
</table>

**TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)**

Half of them travel with their partner/spouse, but 28% travel with kids (multiple response data)

USA (46%)
ITALY (42%)
FRANCE (40%)
SPAIN (38%)
GERMANY (34%)

Key Perceptions of Britain:
- Is a place where I can explore history and heritage (61%)
- Is a mixture of old and new (60%)
- I can roam around visiting many types of places (57%)
- It’s easy to get around once there (56%)
- Is inclusive and accessible for visitors like me (56%)

Top Activity Preferences:
- Explore local food and beverage specialties (72%)
- Visit famous/iconic tourist attractions and places (72%)
- Experience coastal places and scenery (71%)
- Explore history and heritage (historical sites, architecture) (65%)
- Visit famous shops or shopping streets/centres (64%)

Top Holiday Types Preferred (share of preference)

<table>
<thead>
<tr>
<th></th>
<th>Britain</th>
<th>Anywhere internationally</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seeing famous sites, places</td>
<td>17.6%</td>
<td>14.3%</td>
</tr>
<tr>
<td>Relaxing, resting, recharging</td>
<td>14.0%</td>
<td>14.3%</td>
</tr>
<tr>
<td>Exploring or challenging yourself</td>
<td>12.7%</td>
<td>14.3%</td>
</tr>
</tbody>
</table>
| Visiting family and friends | 22.7%   | Base size: Experience Seekers n=261; Total Australia n=1,036, global weighting applies
AUSTRALIA EXPERIENCE SEEKERS (26%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget

- Premium Tourists (8-10)
  - Experience Seekers: 34%
  - Australia total traveller population: 23%
- Mid-Range Tourists (5-7)
  - Experience Seekers: 47%
  - Australia total traveller population: 54%
- Budget Tourists (1-4)
  - Experience Seekers: 19%
  - Australia total traveller population: 23%

TREND ENDORSERS (vs total)

Wellbeing involved 22% (+4%)
Sustainability engaged 20% (+5%)
Inclusion seekers 24% (-1%)

LIVING

42% (+8%) have kids, the split is between kids <12yrs and 12yrs+ is 61% and 39% respectively

43% participate in action and adventure experiences
57% experience pubs, bars and clubs
49% visit theatre, opera, ballet or musicals
41% attend a learning course
34% participate in sport

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:

- Offers experiences I want to share on social media (52%)
- If I don’t visit soon, I’d miss out (28%)
- It offers the opportunity to travel sustainably/responsibly (43%)
- Offers good value for money (35%)
- Is good to visit at any time of year (43%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers experiences I want to share on social media (52%)
- If I don’t visit soon, I’d miss out (28%)
- Has an interesting mix of cultures from around the world (62%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (72%)
- Has a thriving arts and contemporary culture scene (68%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Australia total)

Disproportionately more likely to consider...

USA (+12%)
SPAIN (+11%)
GERMANY (+11%)
ITALY (+9%)
FRANCE (+9%)

SOURCES OF INSPIRATION (BIGGEST SKEWS):

Photography, GIFs or videos on social media: 8%
Travel bloggers and influencers: 7%
Recommendations by friends and family on social media: 7%
Travel apps on mobile phones: 7%

VISITORS (vs total)

Britain Visitors (P5yrs) 37%
Considerers (P5yrs) 63%

AGE

- Median age: 32 yrs
- *Modal age: 22 yrs

- 18-24: 26%
- 25-34: 30%
- 35-44: 29%
- 45-54: 9%
- 55+: 6%

GENDER

43%
57%
Experience Seekers show a higher usage of price comparison site in their planning & booking phase, alongside greater use of airline/airline holiday companies. They are also being driven by bargains/deals more than we see in non European markets.

The majority are using multiple resources in the booking phase, with one in 3 (32%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 30% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via in-person travel agents.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 68% use personal interactions with travel agents throughout their journey, and half of these (52%) people use in-person travel agents in the booking phase.

Resources used; Experience Seekers n=267; total Australia n=1,036; global weighting applies

Experience Seekers show a higher usage of price comparison site in their planning & booking phase, alongside greater use of airline/airline holiday companies. They are also being driven by bargains/deals more than we see in non European markets.

The majority are using multiple resources in the booking phase, with one in 3 (32%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 30% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via in-person travel agents.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 68% use personal interactions with travel agents throughout their journey, and half of these (52%) people use in-person travel agents in the booking phase.
CANADA 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 but PRIORITY Experience Seekers are a smaller segment in Canada vs other markets (13%) representing 9% of Canadian tourists. It is a unique sub-segment which over-indexes on younger tourists, particularly 18-34 yrs who are interested in sustainability and inclusion. Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget.

Canada total traveller population: Budget Tourists (1-4) 26%, Mid-Range Tourists (5-7) 51%, Premium Tourists (8-10) 23%

Experience Seekers: Budget Tourists (1-4) 8%, Mid-Range Tourists (5-7) 49%, Premium Tourists (8-10) 35%

Priority Experience Seekers are trend endorsers (vs total): Wellbeing involved 20% (+3%), Sustainability engaged 38% (+20%), Inclusion seekers 36% (+12%)

GENDER: 46% female, 54% male

SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:
- Travel websites and web pages: 34%
- Recommendations by friends & family on social media: 31%
- Travel bloggers and influencers: 27%

TOP DRIVERS OF DESTINATION CHOICE:
- Offers good value for money (85%)
- Offers a lot of different experiences in one destination (85%)
- There is a good variety of food and drink to try (84%)
- It's easy to get around once there (84%)
- Is a welcoming place to visit (83%)

KEY PERCEPTIONS OF BRITAIN:
- Experience coastal places and scenery (68%)
- Visit famous/iconic tourist attractions and places (67%)
- Experience city life (65%)
- Explore local food and beverage specialties (64%)
- Explore history and heritage (historical sites, architecture) (63%)

TOP ACTIVITY PREFERENCES:
- Experience coastal places and scenery (68%)
- Visit famous/iconic tourist attractions and places (67%)
- Experience city life (65%)
- Explore local food and beverage specialties (64%)
- Explore history and heritage (historical sites, architecture) (63%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)
- Likely to consider...

59% of GB visitors went beyond England (vs 52% Canada other tourists); and 76% beyond London (vs 70% Canada other tourists)

55% travel with their partner/spouse, but 27% travel with kids (multiple response data)

SAFETY welcomes you

Top Holiday Types Preferred (share of preference)
- Seeing famous sites, places 15.2%
- Relaxing, resting, recharging 13.8%
- Exploring or challenging yourself 13.4%
- Visiting family and friends 12.8%

Propensity to travel (vs Canada total traveller population)
- Britain 7.2 (vs 6.6)
- Anywhere internationally 6.0 (vs 5.2)

Base size: Experience Seekers n=247, Total Canada n=1,002; global weighting applies
**CANADA EXPERIENCE SEEKERS (25%)**

**SPEND POTENTIAL AS VISITOR TO BRITAIN:**
Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget
- Premium Tourists (8-10)
  - Experience Seekers: 35%
  - Canada total traveller population: 23%
- Mid-Range Tourists (5-7)
  - Experience Seekers: 49%
  - Canada total traveller population: 51%
- Budget Tourists (1-4)
  - Experience Seekers: 16%
  - Canada total traveller population: 26%

**TREND ENDORSERS (vs total):**

- Wellbeing involved: 19% (+2%)
- Sustainability engaged: 21% (+3%)
- Inclusion seekers: 22% (-3%)

**LIVING:**
43% (+8%) have kids, the split is between kids <12yrs and 12yrs+ is 50%.

**AGE:**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Experience Seekers</th>
<th>Canada total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>15%</td>
<td>36%</td>
</tr>
<tr>
<td>25-34</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>35-44</td>
<td>10%</td>
<td>4%</td>
</tr>
<tr>
<td>45-54</td>
<td></td>
<td></td>
</tr>
<tr>
<td>55+</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Modal age: 25 yrs, Median age: 34 yrs

**GENDER:**
55% female, 45% male

**TYPES OF HOLIDAYS:**

- Canada total traveller population
- Experience Seekers

<table>
<thead>
<tr>
<th>Type of Holiday</th>
<th>Experience Seekers</th>
<th>Canada total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxing, resting, recharging</td>
<td>17.9%</td>
<td></td>
</tr>
<tr>
<td>Visiting family and friends</td>
<td>16.8%</td>
<td></td>
</tr>
<tr>
<td>Seeing famous sites, places, ticking off the 'must do' list</td>
<td>15.2%</td>
<td></td>
</tr>
<tr>
<td>Familiar, comforting, reconnecting</td>
<td>9.8%</td>
<td></td>
</tr>
<tr>
<td>Spoiling/treating myself (and/or others)</td>
<td>10.9%</td>
<td></td>
</tr>
<tr>
<td>Bespoke, unique, unusual experiences and adventures</td>
<td>11.4%</td>
<td></td>
</tr>
<tr>
<td>Exploring, stimulating, learning or challenging yourself</td>
<td>11.6%</td>
<td></td>
</tr>
<tr>
<td>High energy, action-filled fun times</td>
<td>7.5%</td>
<td>12.0%</td>
</tr>
</tbody>
</table>

**MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:**
- Offers experiences I want to share on social media (70%)
- If I don't visit soon, I'd miss out (68%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (74%)
- A place recommended by friends or family (74%)
- Has a thriving arts and contemporary culture scene (69%)

**TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):**
- Participate in action and adventure experiences (60%)
- Participate in wellness activities (41%)
- Visit a brewery or distillery (51%)
- Volunteering (31%)

**COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Canada total):**
Disproportionately more likely to consider...

- Germany (+13%)
- Italy (+12%)
- Australia (+11%)
- Portugal (+10%)
- Spain (+10%)

**KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:**
- Offers good value for money (40%)
- Is good to visit at any time of year (48%)
- Offers experiences I want to share on social media (48%)
- If I don't visit soon, I'd miss out (30%)
- It offers the opportunity to travel sustainably/ responsibly (44%)

**SOURCES OF INSPIRATION (BIGGEST SKEW):**
- Recommendations from friends & family on social media
- Online advertising
- Music, concert, tours
- Travel apps on mobile phones

8% 6% 6% 6%
Experience Seekers show a higher usage of price comparison site in their planning & booking phase, alongside greater use of in-person travel agents. They are also being driven by bargains/deals more than we see in non-European markets.

The majority are using multiple resources in the booking phase, with more than one in 3 (36%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 31% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via price comparison sites.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 60% use personal interactions with travel agents throughout their journey, and almost half (47%) of these people use in-person travel agents in the booking phase.

60% use more than one resource in the planning/booking phase of the customer journey vs 55% for other tourists from Canada.

The majority are using multiple resources in the booking phase, with more than one in 3 (36%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 31% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via price comparison sites.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 60% use personal interactions with travel agents throughout their journey, and almost half (47%) of these people use in-person travel agents in the booking phase.

RESOURCES USED FOR INSPIRATION:

<table>
<thead>
<tr>
<th>Resource Type</th>
<th>Canada total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>26%</td>
<td>34%</td>
</tr>
<tr>
<td>Specials Travel Agent or Tour Operator</td>
<td>24%</td>
<td>28%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>26%</td>
<td>30%</td>
</tr>
<tr>
<td>Price Comparison Site</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>23%</td>
<td>35%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>25%</td>
<td>35%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>10%</td>
<td>18%</td>
</tr>
</tbody>
</table>

EXPERIENCE SEEKER BOOKING HABITS:

<table>
<thead>
<tr>
<th>Booked:</th>
<th>Package</th>
<th>Accommodation</th>
<th>Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online marketplace</td>
<td>9%*</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Price comparison site</td>
<td>21%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Online travel agent</td>
<td>18%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Specialist travel agent</td>
<td>16%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>In-person travel agents</td>
<td>16%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Directly with provider</td>
<td>14%</td>
<td>10%</td>
<td>18%</td>
</tr>
</tbody>
</table>

*Package option likely to be answered as respondents might have misunderstood this option.
CHINA 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.

**SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:**
- Travel bloggers and influencers
- National Tourist Board
- Recommendations by friends & family on social media
- Photography, GIFs or videos on websites

**TOP DRIVERS OF DESTINATION CHOICE:**
- There are vibrant towns and cities to explore (93%)
- Has an interesting mix of cultures from around the world (92%)
- It has surprising and unexpected experiences (91%)
- Is inclusive and accessible for visitors like me (91%)
- Is good for relaxing, resting, recharging (91%)

**KEY PERCEPTIONS OF BRITAIN:**
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (45%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (42%)
- Is good for relaxing, resting, recharging (41%)
- Is a mixture of old and new (41%)
- Is a place where I can explore history and heritage (40%)

**TOp ACTIVITY PREFERENCES:**
- Explore local food and beverage specialties (79%)
- Experience coastal places and scenery (77%)
- Enjoy fine dining experiences (76%)
- Self-driving tours (75%)
- Visit famous/iconic tourist attractions and places (75%)

**TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Likely to consider</th>
<th>(vs total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRANCE</td>
<td>65%</td>
<td>(62%)</td>
</tr>
<tr>
<td>ITALY</td>
<td>62%</td>
<td>(60%)</td>
</tr>
<tr>
<td>NEW ZEALAND</td>
<td>60%</td>
<td>(59%)</td>
</tr>
<tr>
<td>SWITZERLAND</td>
<td>59%</td>
<td>(58%)</td>
</tr>
<tr>
<td>AUSTRALIA</td>
<td>58%</td>
<td>(57%)</td>
</tr>
</tbody>
</table>

**Propensity to travel (vs India total traveller population)**
- Britain: 7.9 (vs 7.8)
- Anywhere internationally: 7.5 (vs 7.3)

**Priority Experience Seekers are trend endorsers (vs total):**
- Wellbeing involved: 15% (+7%)
- Sustainability engaged: 29% (+7%)
- Inclusion seekers: 29% (+7%)

**Base size:** Experience Seekers n=339; Total China n=1,003; global weighting applies
China Experience Seekers (34%)

Types of holidays:
- China total traveller population vs Experience Seekers
  - Seeing famous sites, places, ticking off the ‘must do’ list: 15.0% (15.0%)
  - Relaxing, resting, recharging: 11.5% (14.5%)
  - Familiar, comforting, reconnecting: 14.1% (14.0%)
  - High energy, action-filled fun times: 12.9% (13.0%)
  - Spoiling/treating myself (and/or others): 8.9% (9.3%)
  - Visiting family and friends: 11.5% (12.5%)
  - Bespoke, unique, unusual experiences and adventures: 11.4% (12.6%)
  - Exploring, stimulating, learning or challenging yourself: 15.2% (15.2%)

Spend potential as visitor to Britain:
- Likely spend on 10-point scale, where 10 = super premium and 1 = super budget

Trend endorsers (vs total):
- Wellbeing involved: 11% (+3%)
- Sustainability engaged: 23% (+2%)
- Inclusion seekers: 24% (+2%)

Living:
- 48% (+1%) have kids, the split is between kids <12yrs and 12yrs+ is 60% and 40% respectively.

Key perceptions of Britain – highest differences:
- A good place for treating myself (45%)
- If I don’t visit soon, I’d miss out (33%)
- There are interesting local people to meet (37%)
- Is good to visit at any time of year (40%)
- Is good for relaxing, resting, recharging (41%)

Most significantly different drivers of destination choice:
- There are interesting local people to meet (89%)
- There are vibrant towns and cities to explore (93%)
- If I don’t visit soon, I’d miss out (82%)
- Is inclusive and accessible for visitors like me (91%)
- It has surprising and unexpected experiences (91%)

Visitors (vs total):
- Britain Visitors (P5yrs): 38% (+4%)
- Considerers (P5yrs): 62% (-4%)

Gender:
- 59% male
- 40% female

Top activities (where preferences overindex most):
- Self-driving tours (75%)
- Participate in action and adventure experiences (75%)
- Enjoy fine dining experiences (76%)
- Attend a learning course (cooking, language etc.) (64%)
- Experience pubs, bars and clubs (73%)

Competing with some more unique destinations (vs China total):
- Disproportionately more likely to consider...
  - Spain (+5%)
  - France (+5%)
  - USA (+4%)
  - Italy (+4%)
  - New Zealand (+3%)

Spend potential as visitor to Britain: Likely spend on 10-point scale, where 10 = super premium and 1 = super budget

Base size: Experience Seekers n=339; Total n=1,003; global weighting applies

Sources of inspiration (biggest skews):
- Music, concerts, tours: 6%
- National Tourist Board: 4%
- Kids’ TV, movies or from friends at school: 3%
- Travel websites or web pages: 3%
Experience Seekers show a higher usage of specialist travel agent in their planning & booking phase, alongside greater use of airline/airline holiday companies. They are also being driven by bargains/deals more than we see in non European markets.

The majority are using multiple resources in the booking phase, with one in 3 (29%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 47% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via specialist travel agent.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 88% use personal interactions with travel agents throughout their journey, and 34% of these people use in-person travel agents in the booking phase.

**RESOURCES FOR PLANNING:**

<table>
<thead>
<tr>
<th>China total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Marketplace</td>
<td>29%</td>
</tr>
<tr>
<td>31%</td>
<td></td>
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<tr>
<td>Specialits Travel Agent or Tour Operator</td>
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<tr>
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<td></td>
</tr>
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<td>Airline/Airline Holiday Companies</td>
<td>34%</td>
</tr>
<tr>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Price Comparison Site</td>
<td>34%</td>
</tr>
<tr>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>31%</td>
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<tr>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
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</tr>
<tr>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>4%</td>
</tr>
<tr>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>None of the Above</td>
<td>2%</td>
</tr>
<tr>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>

**TOP INSPIRATIONS:**

- Travel bloggers and influencers (47%)
- National Tourist Board (44%)
- Recommendations friends/family on social media (43%)
- Photography, GIFS or videos on websites (41%)
- Travel websites or web pages (40%)

**RESOURCES USED FOR INSPIRATION:**

- Price Comparison Site: 35% vs 40%
- Airline/Airline Holiday Companies: 31% vs 36%
- Travel Agent via Personal Interaction: 40% vs 44%
- Online Marketplace: 41% vs 42%
- Online only Travel Agent or Tour Operator: 40% vs 39%
- Specialits Travel Agent or Tour Operator: 39% vs 37%
- Peer Review Site: 43% vs 40%
- None of the Above: 2% vs 2%

**EXPERIENCE SEEKER BOOKING HABITS:**

| Tools: 69% use more than one resource in the planning/booking phase of the customer journey vs 67% for other tourists from China. |
|---|---|---|

**PACKAGE VERSUS SEPARATE BOOKINGS:**

<table>
<thead>
<tr>
<th>Experience Seekers</th>
<th>China total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>I didn’t make the booking / can’t recall</td>
<td>1</td>
</tr>
<tr>
<td>I booked everything separately</td>
<td>14</td>
</tr>
<tr>
<td>I booked some, but not all elements together</td>
<td>38</td>
</tr>
<tr>
<td>I booked all key elements of the trip as one package</td>
<td>47</td>
</tr>
</tbody>
</table>

I2, Resources used; Experience Seekers n=339; total N=1,003; global weighting applies
EUROPEAN MARKET
EXPERIENCE SEEKERS

European markets: Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Norway, Spain, Sweden and Switzerland
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.

Propensity to travel (vs India total traveller population)

- **Britain**: 6.9 (vs 6.4)
- **Anywhere internationally**: 6.2 (vs 5.7)

**TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)**

- **Spain** (50%)
- **Italy** (49%)
- **Portugal** (48%)
- **Croatia** (46%)
- **France** (45%)

**KEY PERCEPTIONS OF BRITAIN**

- There are vibrant towns and cities to explore (53%)
- I can roam around visiting many types of places (50%)
- Is good for seeing famous sites, places, ticking off the ‘must do’ list (49%)
- It’s easy to get around once there (49%)
- Offers a lot of different experiences in one destination (48%)

**TOP ACTIVITY PREFERENCES:**

- Explore local food and beverage specialties (65%)
- Experience coastal places and scenery (60%)
- Visit famous/iconic tourist attractions and places (56%)
- Explore history and heritage (historical sites, architecture) (55%)
- Experience city life (55%)

**EUROPEAN MARKET EXPERIENCE SEEKERS (23%)**

- **Likely spend on 10-point scale, where 10 = super premium and 1 = super budget**
  - Budget Tourists (1-4)
  - Mid-Range Tourists (5-7)
  - Premium Tourists (8-10)

<table>
<thead>
<tr>
<th>Category</th>
<th>European market total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Tourists</td>
<td>27%</td>
<td>19%</td>
</tr>
<tr>
<td>Mid-Range Tourists</td>
<td>54%</td>
<td>53%</td>
</tr>
<tr>
<td>Premium Tourists</td>
<td>19%</td>
<td>28%</td>
</tr>
</tbody>
</table>

**SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:**

- Recommendations by friends and family
- Recommendations by friends & family on social media
- Travel bloggers and influencers
- Bargain deals on airfares or tours

- **Wellbeing involved**: 13% (+2%)
- **Sustainability engaged**: 24% (+11%)
- **Inclusion seekers**: 24% (+8%)

**32%** of GB visitors went beyond England (vs 31% European market other tourists); and **51%** beyond London (vs 49% European market other tourists)

**54%** travel with their partner/spouse, but **23%** travel with kids (multiple response data)

**TOP ACTIVITY PREFERENCES**

- Explore local food and beverage specialties (65%)
- Experience coastal places and scenery (60%)
- Visit famous/iconic tourist attractions and places (56%)
- Explore history and heritage (historical sites, architecture) (55%)
- Experience city life (55%)

**KEY PERCEPTIONS OF BRITAIN**

- There are vibrant towns and cities to explore (53%)
- I can roam around visiting many types of places (50%)
- Is good for seeing famous sites, places, ticking off the ‘must do’ list (49%)
- It’s easy to get around once there (49%)
- Offers a lot of different experiences in one destination (48%)

**TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)**

- **Spain** (50%)
- **Italy** (49%)
- **Portugal** (48%)
- **Croatia** (46%)
- **France** (45%)

**Likely to consider…**

- **Spain** (50%)
- **Italy** (49%)
- **Portugal** (48%)
- **Croatia** (46%)
- **France** (45%)

**TOP ACTIVITY PREFERENCES**

- Explore local food and beverage specialties (65%)
- Experience coastal places and scenery (60%)
- Visit famous/iconic tourist attractions and places (56%)
- Explore history and heritage (historical sites, architecture) (55%)
- Experience city life (55%)
**EUROPEAN MARKET EXPERIENCE SEEKERS (23%)**

**SPEND POTENTIAL AS VISITOR TO BRITAIN:**

<table>
<thead>
<tr>
<th>Type of Tourist</th>
<th>Experience Seekers</th>
<th>European market total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Premium Tourists (8-10)</td>
<td>28%</td>
<td>53%</td>
</tr>
<tr>
<td>Mid-Range Tourists (5-7)</td>
<td>19%</td>
<td>27%</td>
</tr>
<tr>
<td>Budget Tourists (1-4)</td>
<td>19%</td>
<td>22%</td>
</tr>
</tbody>
</table>

**TREND ENDORSERS (vs total):**

- Wellbeing involved 12% (+3%)
- Sustainability engaged 16% (+3%)
- Inclusion seekers 17% (+1%)

**LIVING:**

- 31% (-2%) have kids, the split is between kids <12yrs and 12yrs+ is 57% and 43% respectively.

**AGE:**

- *Modal age: 22 yrs*
- Median age: 31 yrs
- 30% 21-34 yrs
- 33% 35-44 yrs
- 21% 45-54 yrs
- 11% 55+

**VISITORS (vs total):**

- Britain Visitors (P5yrs) 39% (+3%)
- Considerers (P5yrs) 61% (-3%)

**GENDER:**

- 59% Male
- 40% Female

**TYPES OF HOLIDAYS:**

- Europe market total traveller population
- Experience Seekers

<table>
<thead>
<tr>
<th>Type of Holiday</th>
<th>Europe Market Total</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxing, resting, recharging</td>
<td>14.3%</td>
<td>20.3%</td>
</tr>
<tr>
<td>Spoiling/treating myself (and/or others)</td>
<td>13.7%</td>
<td>12.3%</td>
</tr>
<tr>
<td>Familiar, comforting, reconnecting</td>
<td>9.9%</td>
<td>9.0%</td>
</tr>
<tr>
<td>Seeing famous sites, places, ticking off the ‘must do’ list</td>
<td>15.1%</td>
<td>14.6%</td>
</tr>
<tr>
<td>Visiting family and friends</td>
<td>11.6%</td>
<td>11.2%</td>
</tr>
<tr>
<td>Exploring, stimulating, learning or challenging yourself</td>
<td>10.6%</td>
<td>12.6%</td>
</tr>
<tr>
<td>Bespoke, unique, unusual experiences and adventures</td>
<td>10.0%</td>
<td>13.1%</td>
</tr>
<tr>
<td>High energy, action-filled fun times</td>
<td>8.8%</td>
<td>12.8%</td>
</tr>
</tbody>
</table>

**SOURCES OF INSPIRATION (BIGGEST SKews):**

<table>
<thead>
<tr>
<th>Source of Inspiration</th>
<th>Europe Market Total</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel bloggers and influencers</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Recommendations by friends &amp; family on social media</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Photography, GIFs or videos on social media</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Music, concerts, tours</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:**

- Offers experiences I want to share on social media (42%)
- If I don’t visit soon, I’d miss out (54%)
- It has surprising and unexpected experiences (77%)
- It offers the opportunity to travel sustainably/responsibly (64%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (56%)

**TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):**

- Participate in action and adventure experiences (52%)
- Attend a sporting event (32%)
- Volunteering (25%)
- Attend a live music festival/event (43%)

**COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs European markets total):**

Disproportionately more likely to consider...

- USA (+13%)
- France (+8%)
- Italy (+8%)
- Netherlands/Switzerland (+8%)

*ES audience in this market have lower perception scores of Britain when compared to the global average*
Experience Seekers show a higher usage of price comparison site in their planning & booking phase, alongside greater use of peer review site. They are also being driven by bargains/deals more than we see in non-European markets.

The majority are using multiple resources in the booking phase, with one in 5 (22%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 27% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via in-person travel agent.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 46% use personal interactions with travel agents throughout their journey, and almost than half of these (47%) use in-person travel agents in the booking phase.

RESOURCES USED FOR INSPIRATION:

- **Price Comparison Site**: 37% European market total traveller population, 39% Experience Seekers
- **Airline/Airline Holiday Companies**: 23% European market total traveller population, 26% Experience Seekers
- **Online Marketplace**: 25% European market total traveller population, 27% Experience Seekers
- **Inspiration: Travel Agent via Personal Interaction**: 23% European market total traveller population, 24% Experience Seekers
- **Specialist Travel Agent or Tour Operator**: 23% European market total traveller population, 23% Experience Seekers
- **Online only Travel Agent or Tour Operator**: 27% European market total traveller population, 28% Experience Seekers
- **Peer Review Site**: 15% European market total traveller population, 11% Experience Seekers
- **None of the Above**: 15% European market total traveller population, 14% Experience Seekers

TOOLs:

- **Online Marketplace**: 22% European market total traveller population, 24% Experience Seekers
- **Peer Review Site**: 25% European market total traveller population, 27% Experience Seekers
- **Price Comparison Site**: 32% European market total traveller population, 33% Experience Seekers
- **Travel via Personal Interaction**: 21% European market total traveller population, 22% Experience Seekers
- **Airline/Airline Holiday Companies**: 25% European market total traveller population, 26% Experience Seekers
- **Specialist Travel Agent or Tour Operator**: 19% European market total traveller population, 20% Experience Seekers
- **Online only Travel Agent or Tour Operator**: 25% European market total traveller population, 24% Experience Seekers
- **None of the Above**: 11% European market total traveller population, 15% Experience Seekers

PACKAGE VERSUS SEPARATE BOOKINGS:

- **Experience Seekers**: 9 booked all key elements of the trip as one package, 27 didn’t make the booking / can’t recall, 35 booked some, but not all elements together, 29 booked everything separately
- **European market total traveller population**: 11 booked all key elements of the trip as one package, 26 didn’t make the booking / can’t recall, 28 booked some, but not all elements together, 35 booked everything separately

EXPERIENCE SEEKER BOOKING HABITS:

<table>
<thead>
<tr>
<th>Booked:</th>
<th>Package</th>
<th>Accommodation</th>
<th>Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online marketplace</td>
<td>16%</td>
<td>21%</td>
<td>16%</td>
</tr>
<tr>
<td>Price comparison site</td>
<td>21%</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Online travel agent</td>
<td>19%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Specialist travel agent</td>
<td>13%</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>In-person travel agents</td>
<td>14%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Directly with provider</td>
<td>15%</td>
<td>16%</td>
<td>18%</td>
</tr>
</tbody>
</table>

*Package option likely to be answered as respondents might have misunderstood this option
FRANCE 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 but PRIORITY Experience Seekers are a smaller segment in France vs other markets representing 6% of French tourists. It is a unique sub-segment which over-indexes on males and younger tourists, particularly 18-34 yrs who are interested in sustainability and inclusion.

Likely spend on 10-point scale, where 10 = super premium and 1 = super budget

<table>
<thead>
<tr>
<th></th>
<th>France total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Tourists (1-4)</td>
<td>29%</td>
<td>52%</td>
</tr>
<tr>
<td>Mid-Range Tourists (5-7)</td>
<td>19%</td>
<td>25%</td>
</tr>
<tr>
<td>Premium Tourists (8-10)</td>
<td>10%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Priority Experience Seekers are trend endorsers (vs total):
Wellbeing involved 14% (+2%)
Sustainability engaged 32% (+17%)
Inclusion seekers 35% (+15%)

GENDER

42% 58%

Propensity to travel (vs France total traveller population)

<table>
<thead>
<tr>
<th></th>
<th>Propensity to travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Britain</td>
<td>6.9 (vs 6.8)</td>
</tr>
<tr>
<td>Anywhere internationally</td>
<td>6.4 (vs 6.0)</td>
</tr>
</tbody>
</table>

Top Holiday Types Preferred (share of preference)

<table>
<thead>
<tr>
<th>Top Holiday Types Preferred</th>
<th>Share of Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seeing famous sites, places</td>
<td>16.7%</td>
</tr>
<tr>
<td>Bespoke, unique experiences</td>
<td>15.1%</td>
</tr>
<tr>
<td>Exploring, stimulating, learning or…</td>
<td>14.4%</td>
</tr>
<tr>
<td>Relaxing, resting, recharging</td>
<td>11.9%</td>
</tr>
</tbody>
</table>

Top Activity Preferences:

- Explore local food and beverage specialties (75%)
- Experience coastal places and scenery (65%)
- Participate in action and adventure experiences (62%)
- Explore history and heritage (historical sites, architecture) (62%)
- Visit parks and gardens (61%)

Top Destinations Likely to Visit (excl. Britain)

- Spain (53%)
- Italy (51%)
- Portugal (48%)
- USA (43%)
- Belgium (33%)

36% of GB visitors went beyond England (vs 31% France other tourists); and 59% beyond London (vs 50% France other tourists).

2 out of 3 travel with their partner/spouse, but 1 out of 4 travel with kids (multiple response data)

Base size: Experience Seekers n=2081; Total Tier 1 n=5893; global weighting applies
**FRANCE EXPERIENCE SEEKERS (26%)**

### SPEND POTENTIAL AS VISITOR TO BRITAIN:

<table>
<thead>
<tr>
<th>Type of Visitor</th>
<th>Experience Seekers</th>
<th>France total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Premium Tourists (8-10)</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Mid-Range Tourists (5-7)</td>
<td>52%</td>
<td>50%</td>
</tr>
<tr>
<td>Budget Tourists (1-4)</td>
<td>29%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget

### Trend Endorsers (vs total)

- Wellbeing involved: 14% (+1%)
- Sustainability engaged: 18% (+3%)
- Inclusion seekers: 21% (+1%)

### Living

40% (-3%) have kids, the split is between kids <12 and 12yrs+ is 60% and 40% respectively

### Key Perceptions of Britain – Highest Differences:

- Offers experiences I want to share on social media (51%)
- Offers good value for money (27%)
- A place recommended by friends or family (36%)
- Is a welcoming place to visit (47%)
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (36%)

### Types of Holidays:

- High energy, action-filled fun times (16.7%)
- Bespoke, unique, unusual experiences and adventures (15.1%)
- Exploring, stimulating, learning or challenging yourself (14.4%)
- Relaxing, resting, recharging (14.0%)
- Visiting family and friends (13.5%)
- Familiar, comforting, reconnecting (12.4%)
- Spoiling/treating myself (and/or others) (13.2%)
- Offers experiences I want to share on social media (17.3%)
- Has surprising and unexpected experiences (11.9%)
- Is a mixture of old and new (11.3%)
- A place recommended by friends or family (10.8%)
- It has experiences I can't have anywhere else (10.0%)
- Participate in action and adventure experiences (16.7%)

### Sources of Inspiration (Biggest Skews):

- Travel bloggers: 7%
- Recommendations from friends & family: 7%
- Photography, GIFs, Videos on social media: 6%
- Photography, GIFs, Videos on websites: 5%

### Competing with Some More Unique Destinations (vs France total)

Disproportionately more likely to consider:

- USA (+10%)
- Belgium (+8%)
- Portugal (+8%)
- Netherlands (+7%)
- Germany (+6%)

Base size: Experience Seekers n=265; Total n=1,003
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators. They are also being driven by bargains/deals more than we see in non European markets.

The majority are using multiple resources in the booking phase, with one in 3 (18%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 28% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Online Marketplaces.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 40% use personal interactions with travel agents throughout their journey, and more than half of these (24%) use them in the booking phase.

**RESOURCES USED FOR INSPIRATION:**

<table>
<thead>
<tr>
<th>Resource</th>
<th>France total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Comparison Site</td>
<td>38%</td>
<td>43%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>21%</td>
<td>24%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>22%</td>
<td>23%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>20%</td>
<td>23%</td>
</tr>
<tr>
<td>Specialists Travel Agent or Tour Operator</td>
<td>21%</td>
<td>17%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>8%</td>
<td>14%</td>
</tr>
</tbody>
</table>

**TOP INSPIRATIONS:**

- Recommendations friends/family (40%)
- Bargains/deals (35%)
- Travel websites (31%)
- Photography on websites (30%)
- Social media – advice recommendations (29%)
- Photography on social media (29%)

**RESOURCES FOR PLANNING:**

<table>
<thead>
<tr>
<th>Resource</th>
<th>France total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Comparison Site</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
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<td>24%</td>
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<td>22%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Specialists Travel Agent or Tour Operator</td>
<td>20%</td>
<td>18%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>12%</td>
<td>18%</td>
</tr>
</tbody>
</table>

**PACKAGES VERSUS SEPARATE BOOKINGS:**

<table>
<thead>
<tr>
<th>Resource</th>
<th>France total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Package</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>Travel</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>Accommodation</td>
<td>25%</td>
<td>19%</td>
</tr>
</tbody>
</table>

**TOOLS:**

41% use more than one resource in the planning/booking phase of the customer journey vs 38% for other tourists from France.

**Booked:**

<table>
<thead>
<tr>
<th>Resource</th>
<th>France total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Via</td>
<td>ES Non</td>
<td>ES Non</td>
</tr>
<tr>
<td>*Online marketplace</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>Price comparison site</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>Online only travel agent</td>
<td>15%</td>
<td>11%</td>
</tr>
</tbody>
</table>

*Data show only stakeholders which are used more by Experience Seekers compared to other segments in the market.

**Package option likely to be answered as respondents might have misunderstood this option**
GCC EXPERIENCE SEEKERS

Combined data: Saudi Arabia, United Arab Emirates
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.
- They represent 29% of GCC tourists and are a unique sub-segment which over-index on 25-34 yrs and interested in new tourism trends particularly inclusion and sustainability.

**Top Holiday Types Preferred**

<table>
<thead>
<tr>
<th>Propensity to travel (vs GCC total traveller population)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Britain 8.1 (vs 8.0)</td>
</tr>
<tr>
<td>Anywhere internationally 7.4 (vs 7.3)</td>
</tr>
</tbody>
</table>

**Sources of Inspiration for Experience Seekers**

- Recommendations or connections with friends & family: 57%
- National Tourist Board Websites: 54%
- Travel bloggers, influencers: 49%
- Budget Tourists (1-4): 1%
- Mid-Range Tourists (5-7): 36%
- Premium Tourists (8-10): 53%

**Top Destination Choice**

- Offers good value for money (93%)
- Is a welcoming place to visit (93%)
- Offers lots of different experiences in one destination (92%)
- I can roam around visiting many types of places (92%)

**Key Perceptions of Britain**

- Is a place where I can explore history and heritage (56%)
- There are vibrant towns and cities to explore (54%)
- Has an interesting mix of cultures from around the world (54%)
- Is a mixture of old and new (54%)
- There is beautiful coast and countryside to explore (54%)

**Top ACTIVITY Preferences**

- Participate in action and adventure experiences (79%)
- Visit famous shops or shopping streets/centres (81%)
- Explore local food and beverage specialties (80%)
- Visit famous/iconic tourist attractions and places (80%)
- Experience coastal places and scenery (79%)

**TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)**

- Italy (63%)
- Switzerland (63%)
- USA (61%)
- Spain (61%)
- France (59%)

**Likely to consider…**

- 2 out of 3 travel with their partner/spouse, but over 4 in 10 travel with kids (multiple response data)

**Base size:** Experience Seekers n=665; GCC total n=1309; global weighting applies
### GCC EXPERIENCE SEEKERS (51%)

**Spend Potential as Visitor to Britain:**
Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget

<table>
<thead>
<tr>
<th>Segment</th>
<th>Experience Seekers</th>
<th>GCC total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Premium Tourists (8-10)</td>
<td>57%</td>
<td>53%</td>
</tr>
<tr>
<td>Mid-Range Tourists (5-7)</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>Budget Tourists (1-4)</td>
<td>8%</td>
<td>11%</td>
</tr>
</tbody>
</table>

**Trend Endorsers (vs total):**
- Wellbeing involved: 24% (+2%)
- Sustainability engaged: 41% (+5%)
- Inclusion seekers: 45% (+6%)

**Living:**
53% (+1%) have kids, and the split is between kids <12 and 12yrs+ is 65% and 35% respectively

**Types of Holidays:**
- Familiar, comforting, reconnecting
- High energy, action-filled fun times
- Exploring, stimulating, learning or challenging yourself
- Relaxing, resting, recharging
- Bespoke, unique, unusual experiences and adventures
- Visiting family and friends
- Spilling/treating myself (and/or others)
- Seeing famous sites, places, ticking off the ‘must do’ list
- Key Perceptions of Britain – Highest Differences:
  - If I don’t visit soon I’d miss out (44%)
  - There is beautiful coast and countryside to explore (54%)
  - Offers a lot of different experiences in one destination (53%)
  - Offers experiences I want to share on social media (53%)
  - It has experiences I can’t have anywhere else (91%)

**Visitors (vs total):**
- Britain Visitors (P5yrs): 44% (+1%)
- Considerers (P5yrs): 56% (-1%)

**Gender**
- 45%
- 54%

**Age**
- *Modal age: 22 yrs*  
- *Median age: 32 yrs*

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Experience Seekers</th>
<th>GCC total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>23%</td>
<td>39%</td>
</tr>
<tr>
<td>25-34</td>
<td>31%</td>
<td>7%</td>
</tr>
<tr>
<td>35-44</td>
<td></td>
<td>1%</td>
</tr>
<tr>
<td>45-54</td>
<td></td>
<td></td>
</tr>
<tr>
<td>55+</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Top Activities (Where Preferences Overindex Most):**
- Participate in action and adventure experiences (79%)
- Experience city life (77%)
- Visit famous shops or shopping streets/centres (81%)
- Visit literary, music, film and TV locations (85%)
- Attend a sporting event (65%)

**Competing with Some More Unique Destinations (vs GCC total):**
Disproportionately more likely to consider...
- USA (+5%)
- Spain (+4%)

**Sources of Inspiration (Biggest Skews):**
- Recommendations or connections with friends & family
- National tourist boards

*Base size: Experience Seekers n=665; total N=1309*
Experience Seekers show a higher usage of specialist and online travel agents in their planning & booking phase. The majority are using multiple resources in the booking phase, with almost half (49%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 39% are booking all elements of their trip (flights and accommodation) together and show a higher propensity to do this via online only Travel agents.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 82% use personal interactions with travel agents throughout their journey, and less than half of these (37%) use them in the booking phase.

RESOURCES USED FOR INSPIRATION:

<table>
<thead>
<tr>
<th>Resource</th>
<th>GCC total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peer Review Site</td>
<td>42%</td>
<td>45%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>40%</td>
<td>44%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>38%</td>
<td>42%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>36%</td>
<td>38%</td>
</tr>
<tr>
<td>Specialist Travel Agent or Tour Operator</td>
<td>37%</td>
<td>38%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>Price Comparison Site</td>
<td>36%</td>
<td>35%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>

RESOURCES FOR PLANNING:

<table>
<thead>
<tr>
<th>Resource</th>
<th>GCC total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialist Travel Agent or Tour Operator</td>
<td>38%</td>
<td>41%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>39%</td>
<td>41%</td>
</tr>
<tr>
<td>Price Comparison Site</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>38%</td>
<td>39%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

TOOLS:

74% use more than one resource in the planning/booking phase of the customer journey vs 69% other tourists from GCC.

PACKAGE VERSUS SEPARATE BOOKINGS:

<table>
<thead>
<tr>
<th>Experience Seekers</th>
<th>GCC total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>I didn't make the booking / can't recall</td>
<td>8</td>
</tr>
<tr>
<td>I booked everything separately</td>
<td>15</td>
</tr>
<tr>
<td>I booked some, but not all elements together</td>
<td>38</td>
</tr>
<tr>
<td>I booked all key elements of the trip as one package</td>
<td>39</td>
</tr>
</tbody>
</table>

82% use travel agents IN PERSON throughout the customer journey vs 78% for other tourists from GCC.

PACKAGE BOOKINGS:

Online only travel agent more likely to be used to make package bookings (22%) versus other tourists from GCC (17%).
GERMANY 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.

Propensity to travel (vs Germany total traveller population)

<table>
<thead>
<tr>
<th>Destination</th>
<th>Experience Seekers</th>
<th>Germany Total Traveller Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Britain</td>
<td>6.9 (vs 6.4)</td>
<td></td>
</tr>
<tr>
<td>Anywhere</td>
<td>6.7 (vs 6.0)</td>
<td></td>
</tr>
</tbody>
</table>

**Sources of inspiration for Experience Seekers:**

- Recommendations by friends & family on social media: 32%
- Travel websites or webpages: 27%
- Travel bloggers and influencers: 28%
- Recommendations or connections with friends & family: 35%

**Top Holiday Types Preferred (share of preference):**

- Relaxing, resting, recharging: 16.5%
- Seeing famous sites, places: 15.5%
- Visiting family and friends: 12.3%
- Bespoke, unique experiences: 12.2%

**Key Perceptions of Britain:**

- Explore local food and beverage specialties (67%)
- Visit famous/iconic tourist attractions and places (62%)
- Experience coastal places and scenery (61%)
- Experience city life (61%)
- Enjoy fine dining experiences (59%)

**Top Activity Preferences:**

- Explore local food and beverage specialties (67%)
- Visit famous/iconic tourist attractions and places (62%)
- Experience coastal places and scenery (61%)
- Experience city life (61%)
- Enjoy fine dining experiences (59%)

**Top Destinations Likely to Visit (excl. Britain):**

- Spain (59%)
- Italy (55%)
- Netherlands (53%)
- USA (50%)
- France (48%)

34% of GB visitors went beyond England (vs 38% Germany other tourists); and 53% beyond London (vs 55% Germany other tourists)

Priority Experience Seekers are trend endorsers (vs total):

- Wellbeing involved 18% (+5%)
- Sustainability engaged 25% (+12%)
- Inclusion seekers 20% (+11%)

**GENDER**

- Male: 44%
- Female: 56%
GERMANY EXPERIENCE SEEKERS (22%)

**Spend Potential as Visitor to Britain:**
- Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget
  - **Experience Seekers:**
    - Premium Tourists (8-10): 32%
    - Mid-Range Tourists (5-7): 55%
    - Budget Tourists (1-4): 13%
  - **Germany Total Traveller Population:**
    - Premium Tourists (8-10): 21%
    - Mid-Range Tourists (5-7): 52%
    - Budget Tourists (1-4): 27%

**Trend Endorsers (vs Total):**
- Wellbeing involved: 14% (+1%)
- Sustainability engaged: 18% (+5%)
- Inclusion seekers: 12% (+2%)

**Living: 27% (-3%)**
- Have kids, the split is between kids <12 and 12yrs+ is 57% and 43% respectively

**Types of Holidays:**
- Germany total traveller population
- Experience Seekers

<table>
<thead>
<tr>
<th>Type of Holiday</th>
<th>Germany Total Traveller Population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxing, resting, recharging</td>
<td>23.8</td>
<td>16.5</td>
</tr>
<tr>
<td>Seeing famous sites, places, ticking off the ‘must do’ list</td>
<td>14.3</td>
<td>15.5</td>
</tr>
<tr>
<td>Visiting family and friends</td>
<td>11.5</td>
<td>12.3</td>
</tr>
<tr>
<td>Bespoke, unique, unusual experiences and adventures</td>
<td>9.9</td>
<td>12.2</td>
</tr>
<tr>
<td>Exploring, stimulating, learning or challenging yourself</td>
<td>11.4</td>
<td>12.2</td>
</tr>
<tr>
<td>Spoiling, treating myself (and/or others)</td>
<td>13.4</td>
<td>11.4</td>
</tr>
<tr>
<td>High energy, action-filled fun times</td>
<td>6.0</td>
<td>11.0</td>
</tr>
<tr>
<td>Familiar, comforting, reconnecting</td>
<td>9.7</td>
<td>9.0</td>
</tr>
</tbody>
</table>

**Most Significantly Different Drivers of Destination Choice:**
- Offers experiences I want to share on social media (58%)
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (59%)
- Is good for seeing famous sites, places, ticking off the ‘must do’ list (76%)
- If I don’t visit soon, I’d miss out (59%)
- Is inclusive and accessible for visitors like me (57%)

**Key Perceptions of Britain – Highest Differences:**
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (59%)
- Offers experiences I want to share on social media (49%)
- A place recommended by friends or family (31%)
- If I don’t visit soon, I’d miss out (27%)

**Visitors (vs Total):**
- Britain Visitors (P5yrs): 33% (-3%)
- Considerers (P5yrs): 67% (+3%)

**Gender: 49% (M) and 51% (F)**

**Age:**
- 33% (18-24)
- 31% (25-34)
- 21% (35-44)
- 10% (45-54)
- 4% (55+)

*Modal age: 19 yrs
Median age: 30 yrs

**Types of Holidays:**
- Germany total traveller population
- Experience Seekers

<table>
<thead>
<tr>
<th>Type of Holiday</th>
<th>Germany Total Traveller Population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxing, resting, recharging</td>
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<tr>
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<td>11.5</td>
<td>12.3</td>
</tr>
<tr>
<td>Bespoke, unique, unusual experiences and adventures</td>
<td>9.9</td>
<td>12.2</td>
</tr>
<tr>
<td>Exploring, stimulating, learning or challenging yourself</td>
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<td>12.2</td>
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<tr>
<td>Spoiling, treating myself (and/or others)</td>
<td>13.4</td>
<td>11.4</td>
</tr>
<tr>
<td>High energy, action-filled fun times</td>
<td>6.0</td>
<td>11.0</td>
</tr>
<tr>
<td>Familiar, comforting, reconnecting</td>
<td>9.7</td>
<td>9.0</td>
</tr>
</tbody>
</table>

**Sources of Inspiration (Biggest Skews):**
- Recommendations from friends and family: 10%
- Travel bloggers: 9%
- Photography, GIFs, videos on websites: 8%
- Information centres in the destination: 8%

**Competing with Some More Unique Destinations (vs Germany Total):**
- USA (+21%)
- Spain (+14%)
- Italy (+13%)
- Netherlands (+11%)
- France (+10%)

*Base size: Experience Seekers n=223; Total n=1,004
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 1 in 4 (25%) using 3 or more sources in this final phase of the journey. Despite their apparent independence, 30% 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 – 47% use personal interactions with travel agents throughout their journey, and more than half of these (28%) use them in the booking phase.

### RESOURCES FOR PLANNING:

<table>
<thead>
<tr>
<th>Resources for Planning</th>
<th>Experience Seekers</th>
<th>Total Traveller Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Comparison Site</td>
<td>33%</td>
<td>38%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>21%</td>
<td>26%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>23%</td>
<td>26%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>28%</td>
<td>26%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>Specialist Travel Agent or Tour Operator</td>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>7%</td>
<td>13%</td>
</tr>
</tbody>
</table>

### TOOLS:

51% use more than one resource in the planning/booking phase of the customer journey vs. 44% for other tourists from Germany.

### PACKAGE VERSUS SEPARATE BOOKINGS:

<table>
<thead>
<tr>
<th>Booked:</th>
<th>Package</th>
<th>Travel</th>
<th>Accommodation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Via:</td>
<td>ES</td>
<td>Non ES</td>
<td>Non ES</td>
</tr>
<tr>
<td>Online marketplace</td>
<td>18%</td>
<td>8%</td>
<td>22%</td>
</tr>
<tr>
<td>Price comparison site</td>
<td>22%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Specialist travel agent</td>
<td>8%</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

*Data show only stakeholders which are used more by Experience Seekers compared to other segments in the market.

**Package option likely to be answered as respondents might have misunderstood this option.

I2, Resources used; Experience Seekers n=6,677; total N=22,840
INDIA 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 but PRIORITY Experience Seekers are a larger segment in India vs other markets (13%) representing 33% of Indian tourists. It is a unique sub-segment which over-indexes on younger tourists, particularly 18-34 yrs who are interested in wellbeing and inclusion.

Likely spend on 10-point scale, where 10 = super Premium and 1 = super Budget

- Budget Tourists (1-4) 60%
- Mid-Range Tourists (5-7) 30%
- Premium Tourists (8-10) 10%

India total traveller population

- 0%
- 30%
- 60%

Experience Seekers

- 7%
- 27%
- 66%

Top Holiday Types Preferred (share of preference)

- Seeing famous sites, places 15.3%
- High energy, action-filled fun times 13.5%
- Relaxing, resting, recharging 13.2%
- Exploring or challenging yourself 13.1%

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

- USA (75%)
- Switzerland (74%)
- Australia (71%)
- France (65%)
- Germany (61%)

Top Holiday Types Preferred (share of preference)

- Seeing famous sites, places 15.3%
- High energy, action-filled fun times 13.5%
- Relaxing, resting, recharging 13.2%
- Exploring or challenging yourself 13.1%

TOP ACTIVITY PREFERENCES:

- Visit famous/iconic tourist attractions and places (84%)
- Visit famous shops or shopping streets/centres (80%)
- Enjoy fine dining experiences (79%)
- Explore history and heritage (historical sites, architecture) (79%)
- Experience coastal places and scenery (79%)

KEY PERCEPTIONS OF BRITAIN:

- Propensity to travel (vs India total traveller population) 8.1 (vs 8.0)
- Anywhere internationally 7.6 (vs 7.5)

TOP DRIVERS OF DESTINATION CHOICE:

- Is a welcoming place to visit (92%)
- Has an interesting mix of cultures from around the world (91%)
- It has surprising and unexpected experiences (91%)
- There is beautiful coast and countryside to explore (91%)
- Offers good value for money (91%)

SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

- Travel bloggers and influencers 53%
- Travel websites or web pages 45%
- Recommendations by friends & family on social media 49%
- National Tourist Board websites 45%

Propensity to travel (vs India total traveller population)

- Britain 8.1 (vs 8.0)
- Anywhere internationally 7.6 (vs 7.5)

TOP ACTIVITY PREFERENCES:

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- Propensity to travel (vs India total traveller population) 8.1 (vs 8.0)
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- It has surprising and unexpected experiences (91%)
- There is beautiful coast and countryside to explore (91%)
- Offers good value for money (91%)

SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

- Travel bloggers and influencers 53%
- Travel websites or web pages 45%
- Recommendations by friends & family on social media 49%
- National Tourist Board websites 45%
**SPEND POTENTIAL AS VISITOR TO BRITAIN:**

Likely to spend on 10-point scale, where 10 = super premium and 1 = super budget

- **Premium Tourists (8-10)**: 66%
- **Mid-Range Tourists (5-7)**: 27%
- **Budget Tourists (1-4)**: 7%

**Experience Seekers**
- 60%
- 30%
- 10%

**India total traveller population**
- 66%
- 30%
- 10%

**TREND ENDORSERS** (vs total)

- **Wellbeing involved**: 17%
- **Sustainability engaged**: 35% (-3%)
- **Inclusion seekers**: 38% (+2%)

**LIVING**

- **44% (+1%)** have kids, the split is between kids <12yrs and 12yrs+ is 46% and 54% respectively.

**AGE**

- 21% 28% 24% 17% 11%  (18-24 25-34 35-44 45-54 55+)
- *Age with the highest frequency* 35 yrs

**VISITORS** (vs total)

- Britain Visitors (P5yrs) 37%
- Considerers (P5yrs) 63%

**TYPES OF HOLIDAYS:**

- **Relaxing, resting, recharging** 14.1%
- **Familiar, comforting, reconnecting** 11.8%
- **Visiting family and friends** 11.9%
- **Spending/treating myself (and/or others)** 9.5%
- **Seeing famous sites, places, ticking off the ‘must do’ list** 15.3%
- **Bespoke, unique, unusual experiences and adventures** 12.2%
- **Exploring, stimulating, learning or challenging yourself** 12.9%
- **High energy, action-filled fun times** 12.6%

**MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:**

- Offers experiences I want to share on social media (87%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (90%)
- It has surprising and unexpected experiences (91%)
- Has an interesting mix of cultures from around the world (91%)
- Has a thriving arts and contemporary culture scene (86%)

**KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:**

- Is a place where I can explore history and heritage (59%)
- It offers the opportunity to travel sustainably/responsibly (56%)
- Offers experiences I want to share on social media (57%)
- I can roam around visiting many types of places (60%)
- Is good to visit at any time of year (51%)

**TRENDS ENDORSERS** (vs total)

- Wellbeing involved: 17%
- Sustainability engaged: 35% (-3%)
- Inclusion seekers: 38% (+2%)

**COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs India total)**

Disproportionately more likely to consider…

- **Australia (+4%)**
- **Switzerland (+3%)**
- **USA (+3%)**
- **France (+3%)**
- **Germany (+2%)**

**SOURCES OF INSPIRATION** (BIGGEST SKEWS):

- Photography, GIFS or videos on websites: 4%
- Local movies or TV programmes: 3%
- International movies or TV programmes: 3%
- Travel apps on mobile phones: 3%
Experience Seekers show a higher usage of online travel agents in their planning & booking phase, alongside greater use of online marketplace. They are also being driven by bargains/deals more than we see in non-European markets.

The majority are using multiple resources in the booking phase, with half of them (49%) using 3 or more sources in this final phase of the journey. Despite their apparent independence, 52% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via online travel agent.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 70% use personal interactions with travel agents throughout their journey, and more than half of these (59%) use them in the booking phase.
ITALY 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 but PRIORITY Experience Seekers are a smaller segment in Italy vs other markets (13%) representing 7% of Italian tourists. It is a unique sub-segment which over-indexes on males, younger tourists, particularly 18-34 yrs who are interested in inclusion.

Priority Experience Seekers are trend endorsers (vs total):
- Wellbeing involved 21% (+6%)
- Sustainability engaged 30% (+8%)
- Inclusion seekers 34% (+12%)

**Sources of Inspiration for Experience Seekers:**
- Recommendations by friends & family on social media 32%
- Travel websites or web pages 29%
- National Tourist Board websites 28%
- Travel bloggers and influencers 29%

**Top Drivers of Destination Choice:**
- I can roam around visiting many types of places (86%)
- It has surprising and unexpected experiences (86%)
- There is beautiful coast and countryside to explore (86%)
- Offers good value for money (84%)
- Offers a lot of different experiences in one destination (84%)

**Key Perceptions of Britain:**
- Is a place where I can explore history and heritage (55%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (54%)
- I can roam around visiting many types of places (53%)
- Has an interesting mix of old and new (52%)
- Has an interesting mix of cultures from around the world (51%)

**Top Activity Preferences:**
- Explore history and heritage (historical sites, architecture) (70%)
- Visit famous/iconic tourist attractions and places (67%)
- Experience coastal places and scenery (66%)
- Explore local food and beverage specialties (61%)
- Visit museums or galleries (60%)

**TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Likelihood to Consider</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPAIN</td>
<td>52%</td>
</tr>
<tr>
<td>FRANCE</td>
<td>45%</td>
</tr>
<tr>
<td>GREECE</td>
<td>42%</td>
</tr>
<tr>
<td>USA</td>
<td>41%</td>
</tr>
<tr>
<td>SWITZERLAND</td>
<td>36%</td>
</tr>
</tbody>
</table>

Base size: Experience Seekers n=261; Total Italy n=1,000; global weighting applies
ITALY EXPERIENCE SEEKERS (26%)
Experience Seekers show a higher usage of price comparison site in their planning & booking phase, alongside greater use of peer review site. They are also being driven by bargains/deals more than we see in non European markets.

The majority are using multiple resources in the booking phase, with one in 4 (22%) using 3 or more sources in this final phase of the journey.

8% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Online travel agent.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 40% use personal interactions with travel agents throughout their journey, and 45% of these people use in person travel agents in the booking phase.

51% use more than one resource in the planning/booking phase of the customer journey vs 46% for other tourists from Italy.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 40% use personal interactions with travel agents throughout their journey, and 45% of these people use in person travel agents in the booking phase.

RESOURCES USED FOR INSPIRATION:

- **Experience Seekers n=261; total N=1,000; global weighting applies**

TOP INSPIRATIONS:
- Recommendations by friends/family on social media (32%)
- Travel bloggers and influencers (29%)
- National Tourist Board (29%)
- Travel websites and web pages (28%)
- Photography, GIFs or videos on social media (28%)

EXPERIENCE SEEKER BOOKING HABITS:

<table>
<thead>
<tr>
<th>Booked:</th>
<th>Package</th>
<th>Accommodation</th>
<th>Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online marketplace</td>
<td>10%*</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Price comparison site</td>
<td>23%</td>
<td>26%</td>
<td>33%</td>
</tr>
<tr>
<td>Online travel agent</td>
<td>23%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>Specialist travel agent</td>
<td>15%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>In-person travel agents</td>
<td>17%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Directly with provider</td>
<td>12%</td>
<td>12%</td>
<td>14%</td>
</tr>
</tbody>
</table>

*Package option likely to be answered as respondents might have misunderstood this option

I2, Resources used; Experience Seekers n=261; total N=1,000; global weighting applies
NETHERLANDS 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** 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.

**TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)**

- **Propensity to travel (vs India total traveller population)**
  - Britain: 7.0 (vs 6.4)
  - Anywhere internationally: 6.3 (vs 5.5)

- **Top Holiday Types Preferred (share of preference)**
  - Seeing famous sites, places: 17.7%
  - High energy, action-filled fun times: 14.8%
  - Exploring or challenging yourself: 14.3%
  - Relaxing, resting, recharging: 14.0%

**NETHERLANDS EXPERIENCE SEEKERS (25%)**

- **SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:**
  - Recommendations by friends & family: 40%
  - Travel websites or web pages: 30%
  - Photography, GIFs or videos on websites: 28%

- **TOP DRIVERS OF DESTINATION CHOICE:**
  - Offers a lot of different experiences in one destination (85%)
  - It has experiences I can't have anywhere else (84%)
  - Offers good value for money (84%)
  - There is a good variety of food and drink to try (81%)
  - I can roam around visiting many types of places (81%)

- **KEY PERCEPTIONS OF BRITAIN:**
  - Is a place where I can explore history and heritage (61%)
  - Is a mixture of old and new (60%)
  - I can roam around visiting many types of places (57%)
  - It's easy to get around once there (56%)
  - Is inclusive and accessible for visitors like me (56%)

- **TOP ACTIVITY PREFERENCES:**
  - Explore local food and beverage specialties (59%)
  - Self-driving tours (54%)
  - Experience city life (50%)
  - Visit famous/iconic tourist attractions and places (49%)
  - Enjoy outdoor walks, hiking or cycling (48%)

**Experience Seekers over-index on potential spend but PRIORITY Experience Seekers are a smaller segment in Netherlands vs other markets (13%) representing 8% of Netherlands’ tourists. It is a unique sub-segment which over-indexes on younger tourists, particularly 18-34 yrs who are interested in wellbeing, sustainability, and inclusion.**

- Likely spend on 10-point scale, where 10 = super Premium and 1 = super Budget
  - Netherlands total traveller population:
    - Budget Tourists (1-4): 16%
    - Mid-Range Tourists (5-7): 57%
    - Premium Tourists (8-10): 28%
  - Experience Seekers:
    - Budget Tourists (1-4): 12%
    - Mid-Range Tourists (5-7): 55%
    - Premium Tourists (8-10): 32%

**Priority Experience Seekers are trend endorsers (vs total):**
- Wellbeing involved: 17% (+9%)
- Sustainability engaged: 25% (+15%)
- Inclusion seekers: 26% (+10%)

**GENDER**
- 53% female
- 45% male

**TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)**

- Likely to consider...
  - Spain: 49%
  - Italy: 43%
  - USA: 40%
  - France: 40%
  - Germany: 37%

**Base size: Experience Seekers n=164; Total Netherlands n=647; global weighting applies**
NETHERLANDS EXPERIENCE SEEKERS (25%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

Likely spend on 10-point scale, where 10 = super premium and 1 = super budget

- **Experience Seekers (32%)**
  - Premium Tourists (8-10)
    - 55%
  - Mid-Range Tourists (5-7)
    - 57%
  - Budget Tourists (1-4)
    - 12%

- **Netherlands total traveller population**
  - Premium Tourists (8-10)
    - 28%
  - Mid-Range Tourists (5-7)
    - 57%
  - Budget Tourists (1-4)
    - 16%

TREND ENDORSERS (vs total)

- Wellbeing involved 11% (+3%)
- Sustainability engaged 12% (+2%)
- Inclusion seekers 16%

LIVING

- 35% (+1%) have kids, the split is between kids <12yrs and 12yrs+ is 56% and 44% respectively.

TRENDS (vs total)

- Offers experiences I want to share on social media (55%)
- A good place for treating myself, e.g. premium brands, gourmet food, etc. (63%)
- If I don’t visit soon, I’d miss out (20%)
- A place recommended by friends or family (34%)
- It offers the opportunity to travel sustainably/responsibly (35%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers experiences I want to share on social media (41%)
- A place recommended by friends or family (34%)
- If I don’t visit soon, I’d miss out (20%)
- A good place for treating myself (38%)
- It offers the opportunity to travel sustainably/responsibly (35%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Netherlands total)

- USA (+15%)
- ITALY (+12%)
- SWITZERLAND (+7%)
- IRELAND (+8%)
- SPAIN (+8%)

VISITORS (vs total)

- Britain Visitors (P5yrs) 47% (+5%)
- Considerers (P5yrs) 53% (-5%)

GENDER

- **Experience Seekers**
  - Female 60%
  - Male 40%

AGE

- Modal age: 31 yrs
- Median age: 32 yrs

- 24% 37%
- 13% 3%
- 18-24 25-34 35-44 45-54 55+

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):

- Participate in action and adventure experiences (48%)
- Experience pubs, bars and clubs (48%)
- Attend a learning course (cooking, language etc) (30%)
- Visit theatre, opera, ballet or musicals (31%)
- Visit literary, music, film and TV locations (30%)

TYPES OF HOLIDAYS:

- Netherlands total traveller population
- Experience Seekers

- Relaxing, resting, recharging 15.3%
- Spilling/treating myself (and/or others) 14.8%
- Seeing famous sites, places, ticking off the ‘must do’ list 14.2%
- Familiar, comforting, reconnecting 14.1%
- Visiting family and friends 10.2%
- Exploring, stimulating, learning or challenging yourself 10.0%
- Bespoke, unique, unusual experiences and adventures 10.1%
- High energy, action-filled fun times 14.7%

SOURCES OF INSPIRATION (BIGGEST SKEW):

- Recommendations by friends & family on social media 9%
- Photography, GIFs or videos on websites 8%
- Information centres in the destination 7%
- Music, concerts, tours 6%

*Base size: Experience Seekers n=164; Total n=647; global weighting applies*
Experience Seekers show a higher usage of peer review site in their planning & booking phase, alongside greater use of price comparison site. They are also being driven by bargains/deals more than we see in non-European markets.

The majority are using multiple resources in the booking phase, with one in 5 (17%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 29% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via price comparison site.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 46% use personal interactions with travel agents throughout their journey, and 39% of these people use in-person travel agent in the booking phase.

RESOURCES FOR INSPIRATION:

- **Price Comparison Site**: 40% for Netherlands total traveller population, 48% for Experience Seekers
- **Online Marketplace**: 21% for Netherlands total traveller population, 24% for Experience Seekers
- **Airline/Airline Holiday Companies**: 21% for Netherlands total traveller population, 24% for Experience Seekers
- **Inspiration: Travel Agent via Personal Interaction**: 20% for Netherlands total traveller population, 21% for Experience Seekers
- **Specialists Travel Agent or Tour Operator**: 19% for Netherlands total traveller population, 21% for Experience Seekers
- **Online only Travel Agent or Tour Operator**: 21% for Netherlands total traveller population, 20% for Experience Seekers
- **Peer Review Site**: 42% for Netherlands total traveller population, 38% for Experience Seekers
- **None of the Above**: 17% for Netherlands total traveller population, 12% for Experience Seekers

**TOP INSPIRATIONS:**

- Recommendations friends/family (40%)
- Travel websites and web pages (30%)
- Recommendations friends/family on social media (29%)
- Photography, GIFs or videos on websites (28%)
- Bargain deals on airfares or tours (25%)

**RESOURCES USED FOR PLANNING:**

- **Netherlands total traveller population**: 29% used 3 or more sources in this final phase of the journey

**EXPERIENCE SEEKER BOOKING HABITS:**

- **Booked:**
  - **Package**: 40% for Netherlands total traveller population, 29% for Experience Seekers
  - **Accommodation**: 33% for Netherlands total traveller population, 27% for Experience Seekers
  - **Travel**: 28% for Netherlands total traveller population, 24% for Experience Seekers

- **Booked:**
  - **Online marketplace**: 9% for Netherlands total traveller population, 14% for Experience Seekers
  - **Price comparison site**: 40% for Netherlands total traveller population, 33% for Experience Seekers
  - **Online travel agent**: 13% for Netherlands total traveller population, 10% for Experience Seekers
  - **Specialist travel agent**: 4% for Netherlands total traveller population, 8% for Experience Seekers
  - **In-person travel agents**: 9% for Netherlands total traveller population, 10% for Experience Seekers
  - **Directly with provider**: 21% for Netherlands total traveller population, 18% for Experience Seekers

*Package option likely to be answered as respondents might have misunderstood this option.

I2, Resources used; Experience Seekers n=164; total N=647; global weighting applies.
SAUDI ARABIA 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.

**PRIORITY Experience Seekers** (highlighted) represent 35% of SA tourists, and a unique sub-segment which over-index on being female with a slight bias to older and interested in new tourism trends of inclusion and sustainability.

Likely spend on 10-point scale, where 10 = super premium and 1 = super budget

- **Budget Tourists** (1-4)
  - 10% of Saudi Arabia total traveller population
  - 5% of Experience Seekers
- **Mid-Range Tourists** (5-7)
  - 30% of Saudi Arabia total traveller population
  - 30% of Experience Seekers
- **Premium Tourists** (8-10)
  - 60% of Saudi Arabia total traveller population
  - 65% of Experience Seekers

**SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:**

- 54% Recommendations by friends & family on social media
- 49% Travel bloggers, influencers
- 44% Recommendations or connections with friends & family
- 39% National Tourist Board Websites

**TOP DRIVERS OF DESTINATION CHOICE:**

- Offers good value for money (94%)
- I can roam around visiting many types of places (94%)
- It is inclusive and accessible for visitors like me (94%)
- It has experiences I can’t have anywhere else (93%)
- Is a welcoming place to visit (93%)

**KEY PERCEPTIONS OF BRITAIN:**

- Has an interesting mix of cultures from around the world (57%)
- Is a place where I can explore history and heritage (56%)
- A good place for treating myself (56%)
- There are vibrant towns and cities to explore (55%)
- I can roam around visiting many types of places (55%)

**PRIORITY Activity Preferences:**

- Visit famous shops or shopping streets/centres (83%)
- Experience coastal places and scenery (82%)
- Visit famous/iconic tourist attractions and places (81%)
- Explore local food and beverage specialties (81%)
- Participate in action and adventure experiences (80%)

**TOP DESTINATIONS LIKELY TO VISIT (excl. Britain):**

- Likely to consider...
  - Italy (63%)
  - USA (63%)
  - Switzerland (61%)
  - Spain (61%)
  - France (59%)

52% of GB visitors went beyond England (vs 54% Saudi Arabia other tourists); and 86% beyond London (vs 86% Saudi Arabia other tourists)

2 out of 3 travel with their partner/spouse, but half of them travel with kids (multiple response data)

**Base size:** Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies
**GENDER**

**SAUDI ARABIA EXPERIENCE SEEKERS (55%)**

**SPEND POTENTIAL AS VISITOR TO BRITAIN:**

- Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget
  - Premium Tourists (8-10) 63%
  - Mid-Range Tourists (5-7) 30%
  - Budget Tourists (1-4) 7%

**TREND ENDORSERS (vs total):**

- Wellbeing involved 28% (+2%)
- Sustainability engaged 44% (+2%)
- Inclusion seekers 48% (+5%)

**LIVING:**

- 59% (+3%) have kids, and the split is between kids <12 and 12yrs+ is 63% and 37% respectively

**AGE:**

- *Modal age: 32yrs
- Median age: 22yrs

**VISITORS (vs total):**

- Britain Visitors (P5yrs) 44% (+1%)
- Considerers (P5yrs) 56% (-1%)

**TYPES OF HOLIDAYS:**

- **Saudi Arabia total traveller population**
- **Experience Seekers**
  - Familiar, comforting, reconnecting 9.9
  - Relaxing, resting, recharging 12.2
  - Exploring, stimulating, learning or challenging yourself 12.7
  - Visiting family and friends 13.0
  - Bespoke, unique, unusual experiences and adventures 13.0
  - Seeing famous sites, places, ticking off the 'must do' list 12.7
  - High energy, action-filled fun times 11.6
  - Spoiling/treating myself (and/or others) 13.3

**MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:**

- Is good to visit at any time of year (92%)
- It has experiences I can’t have anywhere else (93%)
- Is inclusive and accessible for visitors like me (94%)
- There are interesting local people to meet (85%)
- Is a place where I can explore history and heritage (88%)
- I can roam around visiting many types of places (94%)

**KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:**

- Offers a lot of different experiences in one destination (54%)
- Is good to visit at any time of year (47%)
- If I don't visit soon, I'd miss out (45%)
- There is a good variety of food and drink to try (51%)
- It's easy to get to (52%)

**COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Saudi Arabia total):**

- USA (+5%)
- AUSTRIA (+3%)
- ITALY (+3%)
- GERMANY (+3%)
- SPAIN (+3%)

**SOURCES OF INSPIRATION (BIGGEST SKEWS):**

- Recommendations or connections with friends & family 4%
- National tourist boards 3%
- Travel apps 2%
- Travel bloggers and influencers 2%
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 almost half (46%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 39% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Travel agents.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 84% use personal interactions with travel agents throughout their journey, and less than half of these (36%) use them in the booking phase.

RESOURCES USED FOR INSPIRATION:

- Online Marketplace: 46% (50%)
- Peer Review Site: 43% (45%)
- Online only Travel Agent or Tour Operator: 37% (42%)
- Specialist Travel Agent or Tour Operator: 35% (41%)
- Travel Agent via Personal Interaction: 35% (38%)
- Price Comparison Site: 36% (35%)
- Airline/Airline Holiday Companies: 34% (34%)
- None of the Above: 4% (3%)

RESOURCES FOR PLANNING:

- Saudi Arabia total traveller population
- Experience Seekers

- Specialits Travel Agent or Tour Operator: 40% (42%)
- Online only Travel Agent or Tour Operator: 39% (40%)
- Price Comparison Site: 39% (40%)
- Travel Agent via Personal Interaction: 34% (36%)
- Airline/Airline Holiday Companies: 35% (35%)
- Online Marketplace: 36% (35%)
- Peer Review Site: 34% (33%)
- None of the Above: 5% (5%)

TOOLS:

- 71% use more than one resource in the planning/booking phase of the customer journey vs 69% other tourists from Saudi Arabia

PACKAGE VERSUS SEPARATE BOOKINGS:

- I didn’t make the booking / can’t recall
- I booked everything separately
- I booked some, but not all elements together
- I booked all key elements of the trip as one package

PACKAGE BOOKINGS:

- Online only travel agent more likely to be used to make package bookings (22%) versus other tourists from Saudi Arabia (14%)
- 84% use travel agents IN PERSON throughout the customer journey vs 77% for other tourists from Saudi Arabia
SPAIN 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.

**Propensity to travel (vs Spain total traveller population)**
- **Britain** 7.0 (vs 6.8)
- Anywhere internationally 6.6 (vs 6.2)

**Top Holiday Types Preferred (share of preference)**
- Bespoke, unique experiences 14.1%
- High energy, action-filled times 13.7%
- Seeing famous sites, places 13.5%
- Relaxing, resting, recharging 13.4%

**SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:**
- Travel bloggers, influencers 43%
- Travel websites or webpages 43%
- Recommendations or connections with friends & family 41%
- Bargain deals on airfares or tours 43%

**TOP DRIVERS OF DESTINATION CHOICE:**
- **Offers good value for money** (89%)
- **There are vibrant towns and cities to explore** (87%)
- **Offers lots of different experiences in one destination** (86%)
- **There is a good variety of food and drink to try** (86%)
- **It's easy to get around once there** (86%)

**KEY PERCEPTIONS OF BRITAIN:**
- **Is good for seeing famous sites, places, ticking off the 'must do' list** (54%)
- **I can roam around visiting many types of places** (50%)
- **There are interesting local people to meet** (50%)
- **It's easy to get around once there** (48%)
- **Is a mixture of old and new** (48%)

**TOP ACTIVITY PREFERENCES:**
- Explore local food and beverage specialties (72%)
- Experience coastal places and scenery (71%)
- Visit famous/iconic tourist attractions and places (71%)
- Explore history and heritage (historical sites, architecture) (64%)
- Experience rural life and scenery (64%)

**TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)**
- Italy (60%)
- France (53%)
- Portugal (48%)
- USA (45%)
- Ireland (39%)

33% of GB visitors went beyond England (vs 36% Spain other tourists); and 56% beyond London (vs 52% Spain other tourists)

2 out of 3 travel with their partner/spouse, but 1 out of 5 travel with kids (multiple response data)

**Base size:** Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies
SPAIN EXPERIENCE SEEKERS (28%)  

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

- Premium Tourists (8-10): 28%
- Mid-Range Tourists (5-7): 51%
- Budget Tourists (1-4): 20%

TREND ENDORSERS (vs total):

- Wellbeing involved: 19% (+2%)
- Sustainability engaged: 25% (+4%)
- Inclusion seekers: 25% (+1%)

LIVING:

- 38% (-4%) have kids, the split is between kids <12 and 12yrs+ is 47% and 53% respectively

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers experiences I want to share on social media:
  - Experience Seekers: 8.9
  - Total: 14.1

- There is a good variety of food and drink to try:
  - Experience Seekers: 13.0
  - Total: 11.5

- A good place for treating myself, e.g. Priority brands, gourmet food, etc.:
  - Experience Seekers: 12.0
  - Total: 10.7

TYPES OF HOLIDAYS:

- Bespoke, unique, unusual experiences and adventures:
  - Experience Seekers: 8.9
  - Total: 13.7

- High energy, action-filled fun times:
  - Experience Seekers: 13.5
  - Total: 17.2

- Seeing famous sites, places, ticking off the ‘must do’ list:
  - Experience Seekers: 12.4
  - Total: 19.2

- Relaxing, resting, recharging:
  - Experience Seekers: 13.4
  - Total: 17.1

- Exploring, stimulating, learning or challenging yourself:
  - Experience Seekers: 10.2
  - Total: 11.8

- Familiar, comforting, reconnecting:
  - Experience Seekers: 13.0
  - Total: 11.5

- Visiting family and friends:
  - Experience Seekers: 10.7
  - Total: 11.4

- Spoiling/treating myself (and/or others):
  - Experience Seekers: 12.0
  - Total: 10.7

VISITORS (vs total):

- Britain Visitors (P5yrs): 38% (≠)
- Considerers (P5yrs): 62% (≠)

GENDER:

- 60% (≠)
- 39% (≠)

TRENDS ENDORSERS:

- Wellbeing involved: 19% (+2%)
- Sustainability engaged: 25% (+4%)
- Inclusion seekers: 25% (+1%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Spain total):

- USA (+11%)
- NETHERLANDS (+10%)
- ITALY (+10%)
- GERMANY (+8%)
- AUSTRIA (+8%)

SOURCE OF INSPIRATION (BIGGEST SKews):

- Travel bloggers: 13%
- Recommendation from family and friends: 9%
- Sporting events, festivals: 6%
- Billboards, posters, or outdoor advertising: 6%
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators. They are also being driven by bargains/deals more than we see in non European markets.

The majority are using multiple resources in the booking phase, with 1 in 4 (25%) using 3 or more sources in this final phase of the journey. Despite their apparent independence, 34% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Price comparison sites.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 53% use personal interactions with travel agents throughout their journey, and roughly half of these (22%) use them in the booking phase.

**Resources Used for Inspiration:**
- Peer Review Site: 48%
- Price Comparison Site: 37%
- Specials Travel Agent or Tour Operator: 34%
- Online Marketplace: 31%
- Travel Agent via Personal Interaction: 30%
- Online only Travel Agent or Tour Operator: 26%
- Airline/Airline Holiday Companies: 22%
- None of the Above: 5%

**TOP Inspirations:**
- Social media/ travel bloggers (43%)
- Travel websites/web pages (43%)
- Recommendations friends/family (43%)
- Bargains deals on airfares/tours (41%)
- Photography, GIFS or videos on websites
- Social media - travel bloggers, influencers or others sharing their experiences

**Resources for Planning:**
- Spain total traveller population: 29%
- Experience Seekers: 33%
- Online Marketplace: 26%
- Airline/Airline Holiday Companies: 25%
- Peer Review Site: 30%
- Price Comparison Site: 33%
- Specials Travel Agent or Tour Operator: 25%
- Travel Agent via Personal Interaction: 22%
- Online only Travel Agent or Tour Operator: 29%
- None of the Above: 5%

**Tools:**
54% use more than one resource in the planning/booking phase of the customer journey which is the same for other tourists from Spain.

**Package Versus Separate Bookings:**
- Spain total traveller population:
  - Booked: Package: 8
  - Travel: 29
  - Accommodation: 37

**Booked:**
- Online marketplace: 27%
- Price comparison on site: 30%

*Data show stakeholders which are used more by Experience Seekers compared to other segments in the market.*

I2, Resources used; Experience Seekers n=6,677; total N=22,840
UNITED ARAB EMIRATES
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.

Base size: Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies
**GENDER**

**UAE EXPERIENCE SEEKERS (47%)**

**SPEND POTENTIAL AS VISITOR TO BRITAIN:**

Likely spend on 10-point scale, where 10 = super premium and 1 = super budget

<table>
<thead>
<tr>
<th>Category</th>
<th>Experience Seekers</th>
<th>UAE total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Premium Tourists (8-10)</td>
<td>50%</td>
<td>46%</td>
</tr>
<tr>
<td>Mid-Range Tourists (5-7)</td>
<td>41%</td>
<td>42%</td>
</tr>
<tr>
<td>Budget Tourists (1-4)</td>
<td>9%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**TREND ENDORSERS (vs total)**

- Wellbeing involved: 14% (+3%)
- Sustainability engaged: 37% (+6%)
- Inclusion seekers: 40% (+7%)

**LIVING**

46% (-1%) have kids, the split is between kids <12 and 12yrs+ is 68% and 32% respectively

**AGE**

- 18-24: 23%
- 25-34: 30%
- 35-44: 6%
- 45-54: 0%
- 55+: 0%

*Modal age: 32yrs
Median age: 36yrs*

**VISITORS (vs total)**

- Britain Visitors (P5yrs): 44% (+1%)
- Considerers (P5yrs): 56% (-1%)

**TYPES OF HOLIDAYS:**

- Visiting family and friends
- High energy, action-filled fun times
- Seeing famous sites, places, ticking off the ‘must do’ list
- Relaxing, resting, recharging
- Spoiling/treating myself (and/or others)
- Bespoke, unique, unusual experiences and adventures
- Exploring, stimulating, learning or challenging yourself
- Familiar, comforting, reconnecting

**MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:**

- A good place for treating myself, e.g. Priority brands, gourmet food, etc (85%)
- There are interesting local people to meet (86%)
- Is a welcoming place to visit (93%)
- Offers experiences I want to share on social media (84%)
- If I don’t visit soon, I’d miss out (81%)
- Has a thriving arts and contemporary culture scene (88%)

**KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:**

- Offers a lot of different experiences in one destination (52%)
- Is good to visit at any time of year (45%)
- If I don’t visit soon, I’d miss out (43%)
- There is a good variety of food and drink to try (52%)
- It’s easy to get to (46%)

**COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs UAE total)**

Disproportionately more likely to consider…

- AUSTRALIA (+6%)
- SWITZERLAND (+5%)
- SPAIN (+5%)
- USA (+5%)
- Ireland (+5%)

**TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):**

- Participate in action and adventure experiences (78%)
- Experience city life (76%)
- Visit famous shops or shopping streets/centres (78%)
- Attend a live music festival/event (67%)
- Visit literary, music, film and TV locations (63%)

**SOURCES OF INSPIRATION (BIGGEST SKEWS):**

- National tourist board
- Recommendations from friends and family
- Online travel agents/websites
- Billboards, posters, or outdoor advertising

6% 5% 5% 4%

[Base size: Experience Seekers n=310; Total n=662]
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 half (52%) using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 40% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Travel agents.

Don’t be fooled into thinking Experience Seekers are digital-only customers however – 80% use personal interactions with travel agents throughout their journey, and roughly half of these (39%) use them in the booking phase.

**RESOURCES USED FOR INSPIRATION:**

<table>
<thead>
<tr>
<th>Resource</th>
<th>UAE total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peer Review Site</td>
<td>41%</td>
<td>44%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>38%</td>
<td>43%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>38%</td>
<td>43%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>35%</td>
<td>37%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>Price Comparison Site</td>
<td>36%</td>
<td>35%</td>
</tr>
<tr>
<td>Specialists Travel Agent or Tour Operator</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

**RESOURCES FOR PLANNING:**

<table>
<thead>
<tr>
<th>Resource</th>
<th>UAE total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>41%</td>
<td>43%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>40%</td>
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</tr>
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</tr>
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<td>39%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>38%</td>
<td>39%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>32%</td>
<td>39%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**TOOLS:**

77% use more than one resource in the planning/booking phase of the customer journey vs. 69% other tourists from UAE

**PACKAGE VERSUS SEPARATE BOOKINGS:**

<table>
<thead>
<tr>
<th>Booking Type</th>
<th>Experience Seekers</th>
<th>UAE total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>I didn't make the booking / can't recall</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>I booked everything separately</td>
<td>15</td>
<td>17</td>
</tr>
<tr>
<td>I booked some, but not all elements together</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>I booked all key elements of the trip as one package</td>
<td>39</td>
<td>40</td>
</tr>
</tbody>
</table>

**PACKAGE BOOKINGS:**

80% use travel agents IN PERSON throughout the customer journey vs. 79% for other tourists from UAE

I2, Resources used; Experience Seekers n=6,677; total N=22,840
USA 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. 

**TOP PERCENTAGES OF PRIORITY EXPERIENCE SEEKERS:**
- Wellbeing involved: 33% (+10%)
- Sustainability engaged: 50% (+20%)
- Inclusion seekers: 45% (+11%)

**SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:**
- Travel websites or web pages: 41%
- Recommendations by friends & family on social media: 40%
- Travel bloggers, influencers: 39%
- Recommendations or connections with friends & family: 35%

**TOP DRIVERS OF DESTINATION CHOICE:**
- Is a welcoming place to visit (76%)
- Offers a lot of different experiences in one destination (75%)
- Is good for seeing famous sites, places, ticking off the ‘must do’ list (75%)
- There is beautiful coast and countryside to explore (74%)
- It has surprising and unexpected experiences (73%)

**KEY PERCEPTIONS OF BRITAIN:**
- Is inclusive and accessible for visitors like me (55%)
- Offers a lot of different experiences in one destination (55%)
- Is a place where I can explore history and heritage (55%)
- Is good for seeing famous sites, places, ticking off the ‘must do’ list (55%)
- There are vibrant towns and cities to explore (54%)

**TOP ACTIVITY PREFERENCES:**
- Visit famous/iconic tourist attractions and places (81%)
- Explore local food and beverage specialties (81%)
- Experience coastal places and scenery (81%)
- Explore history and heritage (historical sites, architecture) (79%)
- Experience city life (78%)

**TOP DESTINATIONS LIKELY TO VISIT (Excl. Britain):**
- France (68%)
- Italy (67%)
- Australia (62%)
- Germany (61%)
- Spain (61%)

52% of GB visitors went beyond England (vs 56% USA other tourists); and 79% beyond London (vs 79% USA other tourists)

MORE THAN 2/3 travel with their partner/spouse; almost half of them travel with kids (multiple response data)

**USA EXPERIENCE SEEKERS (41%)**
USA EXPERIENCE SEEKERS (41%)
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 40% using 3 or more sources in this final phase of the journey.

Despite their apparent independence, 55% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Price comparison sites.

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 (29%) use them in the booking phase.

**RESOURCES FOR PLANNING:**

- **USA total traveller population**
  - Price Comparison Site: 39%
  - Online only Travel Agent or Tour Operator: 33%
  - Specials Travel Agent or Tour Operator: 30%
  - Online Marketplace: 30%
  - Airline/Airline Holiday Companies: 34%
  - Peer Review Site: 28%
  - Travel Agent via Personal Interaction: 9%
  - None of the Above: 7%

- **Experience Seekers**
  - Price Comparison Site: 40%
  - Online only Travel Agent or Tour Operator: 39%
  - Specials Travel Agent or Tour Operator: 35%
  - Online Marketplace: 35%
  - Airline/Airline Holiday Companies: 33%
  - Peer Review Site: 31%
  - Travel Agent via Personal Interaction: 29%
  - None of the Above: 5%

**TOOLS:**

72% use more than one resource in the planning/booking phase of the customer journey vs 60% other tourists from USA.

**PACKAGE VERSUS SEPARATE BOOKINGS:**

<table>
<thead>
<tr>
<th>Experience Seekers</th>
<th>USA total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>12</td>
<td>18</td>
</tr>
<tr>
<td>28</td>
<td>29</td>
</tr>
<tr>
<td>55</td>
<td>45</td>
</tr>
</tbody>
</table>

**PACKAGE BOOKINGS:**

Price comparison sites more likely to be used to make package bookings (20%) versus non Experience Seekers (15%).

65% use travel agents IN PERSON throughout the customer journey vs 54% for other tourists from USA.
APPENDIX: HOW TO READ THE PEN PORTRAITS
Pen portraits have been developed for the Experience Seeker segment and, additionally, the Priority Experience Seeker segment which is the higher-spending sub-segment of Experience Seekers.

The purpose of a pen-portrait is to give a very quick snapshot summary of some key indicators which help identify the target tourist. Each pen portrait has three pages.

The first page indicates key demographics, holiday motivations, desires and behaviours. The second focuses on elements of the customer journey to inform how and where we can engage with them.

*The Experience Seeker, or Priority Experience Seeker data is generally compared with either:
(a) the total tourist population, or (b) all tourists who are not Experience Seekers (or Priority Experience Seekers as the case may be).

Both approaches highlight how the segment is unique and distinctive.

We typically use blue numbers to highlight data that is significantly higher from the comparative audience and red numbers are significantly lower. The colour coding is intended to help instant navigation towards what is most distinctive.

We also list the most distinctive drivers, perceptions of Britain and activities. These are listed in descending order, so the top statement in each section will be the single biggest difference between the segment and those not in the segment, even if it isn’t the largest in absolute terms.

*European respondents tend to give lower scores due to cultural differences and proximity with Britain
**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.

<table>
<thead>
<tr>
<th>Likely spend on 10-point scale, where 10 = super premium and 1 = super budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total traveller population</td>
</tr>
<tr>
<td>----------------------------</td>
</tr>
<tr>
<td>22%</td>
</tr>
<tr>
<td>Experience Seekers</td>
</tr>
</tbody>
</table>

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

**GENDER**
- Female 45%
- Male 55%

**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)
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).
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.

A short summary of the segment learnings as they apply to the customer journey is captured here.

And the abridged list of resources (which was repeated for the planning & booking phase) is shown here, with the incidence of the segment using each resource compared to the total tourist population.

These are sorted in descending order by target segment usage. Red and blue indicators are used to highlight differences.
The same set of tools and resources are shown when it comes to those used for planning and booking. Once again, they are shown in descending incidence of the target segment.

We illustrate the number of tools used in the key planning & booking phase and compare this to those tourists NOT in the target segment.

Blue and red boxes are used where font colours would be difficult to see (only on one bar so as not to be cluttered).

RESOURCES FOR PLANNING:

- **Total traveller population**
- **Experience Seekers**

<table>
<thead>
<tr>
<th>Resource</th>
<th>Experience Seekers</th>
<th>Total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Comparison Site</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>28%</td>
<td>32%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>28%</td>
<td>30%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>28%</td>
<td>30%</td>
</tr>
<tr>
<td>Specials Travel Agent or Tour Operator</td>
<td>26%</td>
<td>29%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>11%</td>
<td>8%</td>
</tr>
</tbody>
</table>

TOOLS:

- **63%** use more than one resource in the planning/booking phase vs **55%** other tourists

PACKAGE VERSUS SEPARATE BOOKINGS:

<table>
<thead>
<tr>
<th>Experience Seekers</th>
<th>Total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>21</td>
<td>28</td>
</tr>
<tr>
<td>34</td>
<td>31</td>
</tr>
<tr>
<td>37</td>
<td>31</td>
</tr>
</tbody>
</table>

PACKAGE BOOKINGS:

- Online market places more likely to be used to make package bookings (15%) versus other tourists (10%)

- **65%** use travel agents IN PERSON throughout the customer journey vs 55% for other tourists

I didn't make the booking / can't recall
- I booked everything separately
- I booked some, but not all elements together
- I booked all key elements of the trip as one package

The first statistic comes from the base indicated by the dotted red box – i.e. only those who said they booked all elements as one package were then asked HOW they made the booking.

Separately, we indicate what proportion of the segment use in-person travel agents, as the high proportion was found to be quite surprising.