EXPERIENCE SEEKER PEN PORTRAITS

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

**USA EXPERIENCE SEEKERS (41%)**

Experience Seekers over-index on potential spend. If we shine the light on the **PRIORITY Experience Seekers** (highlighted), they represent **28%** of US tourists, and a unique sub-segment which over-index on being **male, 35-44 yrs** and are trend endorsers particularly driven by **sustainability**.

<table>
<thead>
<tr>
<th>Sources of Inspiration for Experience Seekers:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel websites or web pages</td>
</tr>
<tr>
<td>Travel bloggers, influencers</td>
</tr>
<tr>
<td>Recommendations by friends &amp; family on social media</td>
</tr>
<tr>
<td>Recommendations or connections with friends &amp; family</td>
</tr>
</tbody>
</table>

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

- **Propensity to travel** (vs USA total traveller population)
  - Britain: 8.1 (vs 7.5)
  - Anywhere internationally: 7.6 (vs 6.8)

**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**:
- Explore local food and beverage specialties (81%)
- Experience coastal places and scenery (81%)
- Visit famous/ iconic tourist attractions and places (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%)

**More than 2/3 travel with their partner/ spouse; almost 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**
USA EXPERIENCE SEEKERS (41%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:
Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget
- Premium Tourists (8-10) 67%
- Mid-Range Tourists (5-7) 26%
- Budget Tourists (1-4) 7%

TREND ENDORSERS (vs total)
- Wellbeing involved 28% (+5%)
- Sustainability engaged 39% (+9%)
- Inclusion seekers 39% (+5%)

LIVING
- 58% (+14%) have kids, and the split is between kids <12 and 12yrs+ is 38% and 62%

ETHNICITY (USA)
- 77% White
- 8% Black
- 7% Latinx
- 3% Asian

AGE
- 18-24: 12%
- 25-34: 31%
- 35-44: 38%
- 45-54: 12%
- 55+: 7%

*Modal age: 35yrs
Median age: 35yrs

VISITORS (vs USA total)
- Britain Visitors (P5yrs) 54% (+8%)
- Considerers (P5yrs) 46% (-8%)
- Identified as LGBTQ+ 17% (+2%)

GENDER
- Female: 35%
- Male: 65%

TYPES OF HOLIDAYS:
- USA total traveller population
- Experience Seekers
  - Seeing famous sites, places, ticking off the ‘must do’ list: 18.7
  - High energy, action-filled fun times: 7.2
  - Bespoke, unique, unusual experiences and adventures: 12.6
  - Exploring, stimulating, learning or challenging yourself: 13.5
  - Spoiling/treating myself (and/or others): 12.2
  - Visiting family and friends: 10.5
  - Familiar, comforting, reconnecting: 9.8

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:
- Offers experiences to share on social media (80%)
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (85%)
- It offers the opportunity to travel sustainably/responsibly (85%)
- Has a thriving arts and contemporary culture scene (84%)
- A place recommended by family & friends (84%)
- If I don’t visit soon, I’d miss out (76%)

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:
- If I don’t visit soon, I’d miss out (41%)
- Is good to visit at any time of year (51%)
- Offers the opportunity to travel sustainably (49%)
- Offers experiences I want to share on social media (48%)
- Offers good value for money (47%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):
- Participate in action and adventure experiences (75%)
- Attend a sporting event (67%)
- Participate in wellness activities (65%)
- Participate in sports (63%)
- Volunteering (57%)
- Visit literary, music, film and TV locations (68%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs USA total)
Disproportionately more likely to consider...
- Germany (+14%)
- France (+14%)
- Greece (+14%)
- Australia (+14%)
- Spain (+10%)

SOURCES OF INSPIRATION (BIGGEST SKEW):
- Recommendations or connections with friends & family 10%
- Travel bloggers, influencers 10%
- Music, concerts, tours 7%
- Kids’ TV, movies or from friends at school 7%

Base size: Experience Seekers n=652; Total n=1,576
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 USED FOR INSPIRATION:

<table>
<thead>
<tr>
<th>USA total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>32%</td>
</tr>
<tr>
<td>Price Comparison Site</td>
<td>33%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>31%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>29%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>34%</td>
</tr>
<tr>
<td>Specialis Travel Agent or Tour Operator</td>
<td>29%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>29%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>13%</td>
</tr>
</tbody>
</table>

RESOURCES FOR PLANNING:

<table>
<thead>
<tr>
<th>USA total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Comparison Site</td>
<td>39%</td>
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<tr>
<td>Online only Travel Agent or Tour Operator</td>
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</tr>
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<tr>
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<tr>
<td>Peer Review Site</td>
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</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>29%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>9%</td>
</tr>
</tbody>
</table>

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>USA total traveller population</th>
<th>Experience Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I didn’t make the booking / can’t recall</td>
<td>5%</td>
</tr>
<tr>
<td>I booked everything separately</td>
<td>18%</td>
</tr>
<tr>
<td>I booked some, but not all elements together</td>
<td>29%</td>
</tr>
<tr>
<td>I booked all key elements of the trip as one package</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
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. If we shine the light on the PRIORITY Experience Seekers (highlighted), 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.

**SOURCEs of inspiration for experience seekers:**

- Recommendations by friends & family on social media: 54%
- Travel bloggers, influencers: 49%
- Recommendations of connections with friends & family: 47%
- National Tourist Board Websites: 41%

**TOP DRivers of 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%)
- A good place for treating myself (54%)

**TOP ACTIVITY PREFERENCES:**

- 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%)
- Participate in action and adventure experiences (79%)

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

Likely to consider...

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

57% of GB visitors went beyond England (vs 59% GCC other tourists); and 88% of England visitors beyond London (vs 88% GCC other tourists)

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

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

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

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

GENDER
45% (Male) 54% (Female)

TYPES OF HOLIDAYS:

- GCC total traveller population
- Experience Seekers

1. Seeing famous sites, places, ticking off the 'must do' list
2. High energy, action-filled fun times
3. Spoiling/treating myself (and/or others)
4. Visiting family and friends
5. Relaxing, resting, recharging
6. Bespoke, unique, unusual experiences and adventures
7. Exploring, stimulating, learning or challenging yourself
8. Familiar, comforting, reconnecting

SOURCE OF INSPIRATION (BIGGEST SKEWS):
Recommendations or connections with friends & family (+5)
National tourist boards (+5)

MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:
- There are interesting local people to meet (86%)
- A good place for treating myself e.g. Priority brands, gourmet food (88%)
- It has experiences I can’t have anywhere else (91%)

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%)
- Is a welcoming place to visit (53%)
- Offers experiences I want to share on social media (53%)
- There is a good variety of food & drink to try (51%)

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%)

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 FOR PLANNING:

**GCC total traveller population**
- Specialist Travel Agent or Tour Operator: 38% (41%)
- Online only Travel Agent or Tour Operator: 39% (41%)
- Price Comparison Site: 40% (40%)
- Airline/Airline Holiday Companies: 38% (39%)
- Online Marketplace: 36% (37%)
- Travel Agent via Personal Interaction: 36% (37%)
- Peer Review Site: 33% (33%)
- None of the Above: 5% (5%)

**Experience Seekers**
- Specialist Travel Agent or Tour Operator: 38% (41%)
- Online only Travel Agent or Tour Operator: 39% (41%)
- Price Comparison Site: 40% (40%)
- Airline/Airline Holiday Companies: 38% (39%)
- Online Marketplace: 36% (37%)
- Travel Agent via Personal Interaction: 36% (37%)
- Peer Review Site: 33% (33%)
- None of the Above: 5% (5%)

RESOURCES USED FOR INSPIRATION:

- Peer Review Site: 42% (45%)
- Online Marketplace: 40% (44%)
- Online only Travel Agent or Tour Operator: 38% (42%)
- Airline/Airline Holiday Companies: 36% (38%)
- Specialist Travel Agent or Tour Operator: 37% (38%)
- Travel Agent via Personal Interaction: 35% (36%)
- Price Comparison Site: 36% (35%)
- None of the Above: 5% (4%)

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>Type of Booking</th>
<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>
<td>6</td>
</tr>
<tr>
<td>I booked everything separately</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>I booked some, but not all elements together</td>
<td>38</td>
<td>39</td>
</tr>
<tr>
<td>I booked all key elements of the trip as one package</td>
<td>39</td>
<td>39</td>
</tr>
</tbody>
</table>

PACKAGE BOOKINGS:

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

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

Propensity to travel (vs Saudi Arabia total traveller population)

<table>
<thead>
<tr>
<th>Preference</th>
<th>Experience Seekers</th>
<th>Saudi Arabia total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anywhere internationally</td>
<td>7.4 (vs 7.3)</td>
<td>7.4 (vs 7.3)</td>
</tr>
<tr>
<td>Britain</td>
<td>8.1 (vs 8.1)</td>
<td>8.1 (vs 8.1)</td>
</tr>
</tbody>
</table>

SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

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

TOP DRIVERS OF DESTINATION CHOICE:

- Offers good value for money (94%)
- I can roam around visiting many types of places (94%)
- 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%)

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

TOP 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)

<table>
<thead>
<tr>
<th>Destination</th>
<th>Likely to consider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>(63%)</td>
</tr>
<tr>
<td>USA</td>
<td>(63%)</td>
</tr>
<tr>
<td>Switzerland</td>
<td>(61%)</td>
</tr>
<tr>
<td>Spain</td>
<td>(61%)</td>
</tr>
<tr>
<td>France</td>
<td>(59%)</td>
</tr>
</tbody>
</table>
SAUDI ARABIA EXPERIENCE SEEKERS (55%)
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:

<table>
<thead>
<tr>
<th>Resource</th>
<th>Experience Seekers</th>
<th>Saudi Arabia total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Marketplace</td>
<td>46%</td>
<td>50%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>43%</td>
<td>45%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>37%</td>
<td>42%</td>
</tr>
<tr>
<td>Specialist Travel Agent or Tour Operator</td>
<td>40%</td>
<td>41%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>35%</td>
<td>38%</td>
</tr>
<tr>
<td>Price Comparison Site</td>
<td>36%</td>
<td>35%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

RESOURCES FOR PLANNING:

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<tr>
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<td>Peer Review Site</td>
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<td>33%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Booking Type</th>
<th>Experience Seekers</th>
<th>Saudi Arabia total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>I didn’t make the booking / can’t recall</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>I booked everything separately</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>I booked some, but not all elements together</td>
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<td>39</td>
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<tr>
<td>I booked all key elements of the trip as one package</td>
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</tbody>
</table>

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
UNITED ARAB EMIRATES
EXPERIENCE SEEKERS
**UAE EXPERIENCE SEEKERS (47%)**

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 UAE total traveller population)**
  - Britain: 8.1 (vs 7.9)
  - Anywhere internationally: 7.4 (vs 7.2)

**Top Holiday Types Preferred**

<table>
<thead>
<tr>
<th>Top Holiday Types Preferred</th>
<th>Share of Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting family and friends</td>
<td>13.7%</td>
</tr>
<tr>
<td>High energy, action-filled fun times</td>
<td>13.3%</td>
</tr>
<tr>
<td>Seeing famous sites, places, ticking off</td>
<td>13.3%</td>
</tr>
<tr>
<td>Relaxing, resting, recharging</td>
<td>13.0%</td>
</tr>
</tbody>
</table>

**Experience Seekers**
- Represent 23% of UAE tourists, and are a unique sub-segment with a slight bias to 25-34 yrs, males and interested in new tourism trends particularly inclusion and sustainability.
- **TOP DRIVERS OF DESTINATION CHOICE:**
  - Is a welcoming place to visit (93%)
  - Offers lots of different experiences in one destination (91%)
  - Is good for relaxing, resting, recharging (91%)
  - Offers good value for money (91%)
  - I can roam around visiting many types of places (90%)

**SOURCEs OF INSPIRATION FOR EXPERIENCE SEEKERS:**
- Travel bloggers, influencers: 50%
- Social media: 54%
- National Tourist Board Websites: 42%
- Recommendations or connections with friends & family: 46%

**KEY PERCEPTIONS OF BRITAIN:**
- Is a welcoming place to visit (56%)
- There is beautiful coast and countryside to explore (56%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (55%)
- Is a place where I can explore history and heritage (55%)
- Is a mixture of old and new (54%)

**TOP ACTIVITY PREFERENCES:**
- Visit famous/iconic tourist attractions and places (79%)
- Visit famous shops or shopping streets/centres (78%)
- Explore local food and beverage specialties (78%)
- Participate in action and adventure experiences (78%)
- Experience city life (76%)

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

<table>
<thead>
<tr>
<th>Destination</th>
<th>Likely to consider...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>64%</td>
</tr>
<tr>
<td>Italy</td>
<td>62%</td>
</tr>
<tr>
<td>Spain</td>
<td>60%</td>
</tr>
<tr>
<td>USA</td>
<td>59%</td>
</tr>
<tr>
<td>France</td>
<td>58%</td>
</tr>
</tbody>
</table>

**Likely to travel**
- 2 out of 3 travel with their partner/spouse, but 40% travel with kids (multiple response data)

**64% of GB visitors went beyond England**
- Vs 65% UAE other tourists
- Vs 89% UAE other tourists beyond London

**Priority Experience Seekers**
- GENDER: 34% female, 66% male
- Wellbeing involved: 24% (+7%)
- Sustainability engaged: 43% (+12%)
- Inclusion seekers: 48% (+14%)

**Base size:** Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies
UAE EXPERIENCE SEEKERS (47%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:

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

- Premium Tourists (8-10): 50%
- Mid-Range Tourists (5-7): 41%
- Budget Tourists (1-4): 9%

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: 40%
- 35-44: 30%
- 45-54: 6%
- 55+: 0%

*Age with the highest frequency

*Modal age: 32yrs
Median age: 36yrs

VISITORS (vs total)

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

GENDER

- 39%
- 60%

TYPES OF HOLIDAYS:

- UAE total traveller population
- Experience Seekers

- Visiting family and friends: 14.9%
- High energy, action-filled fun times: 10.6%
- Seeing famous sites, places, ticking off the 'must do' list: 15.0%
- Relaxing, resting, recharging: 13.0%
- Spilling/treating myself (and/or others): 11.9%
- Bespoke, unique, unusual experiences and adventures: 10.3%
- Exploring, stimulating, learning or challenging yourself: 11.3%
- Familiar, comforting, reconnecting: 10.0%

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 (86%)

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%)

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%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs UAE total)

Disproportionately more likely to consider...

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

SOURCES OF INSPIRATION (BIGGEST SKEWS):

- National tourist board: 6%
- Recommendations from friends and family: 5%
- Online travel agents/websites: 5%
- Billboards, posters, or outdoor advertising: 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 Type</th>
<th>Experience Seekers</th>
<th>UAE total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peer Review Site</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>35%</td>
<td>35%</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>36%</td>
</tr>
<tr>
<td>Specialist 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 Type</th>
<th>Experience Seekers</th>
<th>UAE total traveller population</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>
<td>41%</td>
</tr>
<tr>
<td>Price Comparison Site</td>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>Specialist Travel Agent or Tour Operator</td>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>36%</td>
<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>15%</td>
<td>17%</td>
</tr>
<tr>
<td>I booked everything separately</td>
<td>39%</td>
<td>39%</td>
</tr>
<tr>
<td>I booked some, but not all elements together</td>
<td>39%</td>
<td>40%</td>
</tr>
</tbody>
</table>
| I booked all key elements of the trip as one package | | 80% use travel agents IN PERSON throughout the customer journey vs 79% for other tourists from UAE.
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, 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 Spain vs other markets representing 8% of Spanish tourists. It is a unique sub segment which over-indexes on younger tourists, particularly 18-24 yrs, but not differentiated by new tourism trends as seen in other countries.

**Sources of Inspiration for Experience Seekers:**
- Travel bloggers, influencers: 43%
- Travel websites or webpages: 43%
- Recommendations or connections with friends & family: 43%
- Bargain deals on airfares or tours: 41%

**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/conic tourist attractions and places (71%)
- 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).

GENDER:
- Wellbeing involved: 19% (+2%)
- Sustainability engaged: 28% (+7%)
- Inclusion seekers: 22% (-2%)

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)**
  - Experience Seekers: 28%
  - Spain total traveller population: 19%

- **Mid-Range Tourists (5-7)**
  - Experience Seekers: 51%
  - Spain total traveller population: 55%

- **Budget Tourists (1-4)**
  - Experience Seekers: 20%
  - Spain total traveller population: 27%

**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

**AGE:**
- **18-24:** 30%
- **25-34:** 30%
- **35-44:** 21%
- **45-54:** 13%
- **55+:** 6%

*Modal age: 19yrs
Median age: 32yrs

**VISITORS (vs total):**
- Britain Visitors (P5yrs): 38% (=%)
- Considerers (P5yrs): 62% (=%)

**GENDER:**
- **60%**
- **39%**

**TYPES OF HOLIDAYS:**
- Spain total traveller population
- Experience Seekers

- Bespoke, unique, unusual experiences and adventures: 8.9 vs 14.1
- High energy, action-filled fun times: 8.9 vs 13.7
- Seeing famous sites, places, ticking off the 'must do' list: 13.5 vs 17.2
- Relaxing, resting, recharging: 12.4 vs 19.2
- Exploring, stimulating, learning or challenging yourself: 10.2 vs 11.8
- Familiar, comforting, reconnecting: 13.0 vs 11.5
- Visiting family and friends: 10.7 vs 11.4
- Spoiling/treating myself (and/or others): 12.0 vs 10.7

**MOST SIGNIFICANTLY DIFFERENT DRIVERS OF DESTINATION CHOICE:**
- Offers experiences I want to share on social media (67%)
- It has surprising and unexpected experiences (85%)
- If I don't visit soon, I'd miss out (68%)
- There are interesting local people to meet (83%)
- There is a good variety of food and drink to try (86%)
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (63%)

**KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:**
- Offers experiences I want to share on social media (44%)
- There is a good variety of food and drink to try (43%)
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (38%)

**TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):**
- Participate in action and adventure experiences (60%)
- Attend a live music festival/event (58%)
- Experience pubs, bars and clubs (53%)
- Participate in sport (33%)
- Socialising with locals (62%)

**COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Spain total):**
Disproportionately more likely to consider...
- **USA (+11%)**
- **NETHERLANDS (+10%)**
- **ITALY (+10%)**
- **GERMANY (+8%)**
- **AUSTRIA (+8%)**

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

<table>
<thead>
<tr>
<th>Travel bloggers</th>
<th>Recommendations from friends and family</th>
<th>Sporting events, festivals</th>
<th>Billboards, posters, or outdoor advertising</th>
</tr>
</thead>
<tbody>
<tr>
<td>13%</td>
<td>9%</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base size: Experience Seekers n=276; Total n=1,001
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% (46% Experience Seekers)
- Price Comparison Site: 36% (37% Experience Seekers)
- Specialist Travel Agent or Tour Operator: 28% (34% Experience Seekers)
- Online Marketplace: 26% (31% Experience Seekers)
- Travel Agent via Personal Interaction: 25% (30% Experience Seekers)
- Only Online Travel Agent or Tour Operator: 19% (28% Experience Seekers)
- Airline/Airline Holiday Companies: 19% (22% Experience Seekers)
- None of the Above: 7% (4% Experience Seekers)

**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
- Experience Seekers

**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:**
- Booked:
  - 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

**Data:**
- Experience Seekers n=6,677; total N=22,840

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

Experience Seekers over-index on potential spend but PRIORITY Experience Seekers are a smaller segment in Germany vs other markets representing 7% of German tourists. They are a unique sub segment which over-index on younger tourists, particularly 18-24 yrs, and females and driven by new social trends of sustainability and inclusion.

Priority Experience Seekers are trend endorsers (vs total): Wellbeing involved 18% (+5%); Sustainability engaged 25% (+12%); Inclusion seekers 20% (+11%)

**Sources of Inspiration for Experience Seekers:**
- Recommendations or connections with friends & family: 35%
- Travel bloggers and influencers: 28%
- Travel websites or webpages: 27%

**Top Drivers of Destination Choice:**
- Offers good value for money (82%)
- Is a welcoming place to visit (81%)
- Offers lots of different experiences in one destination (79%)
- It's easy to get around once there (79%)
- It has experiences I can't have anywhere else (78%)

**Key Perceptions of Britain:**
- There are vibrant towns and cities to explore (54%)
- Offers a lot of different experiences in one destination (51%)
- It's easy to get around once there (50%)
- I can roam around visiting many types of places (49%)
- Offers experiences I want to share on social media (49%)

**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)
GERMANY EXPERIENCE SEEKERS (22%)

SPEND POTENTIAL AS VISITOR TO BRITAIN:
- Likely spend on 10-point scale, where 10 = super Premium and 1 = super budget
  - Premium Tourists (8-10): 32%
  - Mid-Range Tourists (5-7): 21%
  - Budget Tourists (1-4): 13%

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

AGE
- Median age: 30 yrs
- *Modal age: 19 yrs

VISITORS (vs total)
- Britain Visitors (P5yrs) 33% (-3%)
- Considerers (P5yrs) 67% (+3%)

GENDER
- 49% vs 51%

TYPES OF HOLIDAYS:
- Germany total traveller population
  - Relaxing, resting, recharging: 16.5
  - Seeing famous sites, places, ticking off the ‘must do’ list: 14.3
  - Visiting family and friends: 11.5
  - Bespoke, unique, unusual experiences and adventures: 9.9
  - Exploring, stimulating, learning or challenging yourself: 11.4
  - Spoiling/treating myself (and/or others): 13.4
  - High energy, action-filled fun times: 6.0
  - Familiar, comforting, reconnecting: 9.7

- Experience Seekers
  - Relaxing, resting, recharging: 18.5
  - Seeing famous sites, places, ticking off the ‘must do’ list: 15.5
  - Visiting family and friends: 12.3
  - Bespoke, unique, unusual experiences and adventures: 12.2
  - Exploring, stimulating, learning or challenging yourself: 12.2
  - Spoiling/treating myself (and/or others): 11.4
  - High energy, action-filled fun times: 11.0
  - Familiar, comforting, reconnecting: 9.0

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. (39%)
- 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%)

TOP ACTIVITIES (WHERE PREFERENCES OVERINDEX MOST):
- Participate in action and adventure experiences (56%)
- Participate in sport (38%)
- Experience city life (61%)
- Experience pubs, bars and clubs (54%)
- Visit famous shops or shopping streets/centres (58%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs Germany total)
- Disproportionately more likely to consider...
  - USA (+21%)
  - Spain (+14%)
  - Italy (+13%)
  - Netherlands (+11%)
  - France (+10%)

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%
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 USED FOR INSPIRATION:**

- **Price Comparison Site:** 44% (38% for Germany total traveller population)
- **Online only Travel Agent or Tour Operator:** 37% (30% for Germany total traveller population)
- **Peer Review Site:** 35% (33% for Germany total traveller population)
- **Airline/Airline Holiday Companies:** 29% (26% for Germany total traveller population)
- **Online Marketplace:** 28% (26% for Germany total traveller population)
- **Specialists Travel Agent or Tour Operator:** 24% (19% for Germany total traveller population)
- **Travel Agent via Personal Interaction:** 23% (23% for Germany total traveller population)
- **None of the Above:** 14% (13% for Germany total traveller population)

**TOP INSPIRATIONS:**

- Recommendations from friends/family (35%)
- Social media – advice recommendations (32%)
- Social media/travel bloggers (28%)
- Travel websites (27%)
- Photography on websites (27%)
- Bargains/deals (26%)

**RESOURCES FOR PLANNING:**

- **Price Comparison Site:** 35% (33% for Germany total traveller population)
- **Travel Agent via Personal Interaction:** 28% (25% for Germany total traveller population)
- **Airline/Airline Holiday Companies:** 26% (21% for Germany total traveller population)
- **Online Marketplace:** 26% (23% for Germany total traveller population)
- **Online only Travel Agent or Tour Operator:** 26% (25% for Germany total traveller population)
- **Peer Review Site:** 25% (24% for Germany total traveller population)
- **Specialists Travel Agent or Tour Operator:** 21% (16% for Germany total traveller population)
- **None of the Above:** 13% (7% for Germany total traveller population)

**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:**

- **Experience Seekers**
  - I didn’t make the booking / can’t recall: 30%
  - I booked everything separately: 23%
  - I booked some, but not all elements together: 39%
  - I booked all key elements of the trip as one package: 7%

- **Germany total traveller population**
  - I didn’t make the booking / can’t recall: 22%
  - I booked everything separately: 35%
  - I booked some, but not all elements together: 28%
  - I booked all key elements of the trip as one package: 14%

*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.
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>52%</td>
<td>19%</td>
</tr>
<tr>
<td>Premium Tourists (8-10)</td>
<td>19%</td>
<td>25%</td>
</tr>
</tbody>
</table>

TOP DRIVERS OF DESTINATION CHOICE:
- Offers good value for money (85%)
- There is beautiful coast and countryside to explore (84%)
- Is a welcoming place to visit (83%)
- It's easy to get around once there (83%)
- It has surprising and unexpected experiences (82%)

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%)

KEY PERCEPTIONS OF BRITAIN:
- It's easy to get around once there (55%)
- I can roam around visiting many types of places (54%)
- There are vibrant towns and cities to explore (52%)
- Is good to visit at any time of year (51%)
- Is good for seeing famous sites, places, ticking off the 'must do' list (51%)

TOP DESTINATIONS LIKELY TO VISIT (excl. Britain)

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>53%</td>
</tr>
<tr>
<td>Italy</td>
<td>51%</td>
</tr>
<tr>
<td>Portugal</td>
<td>48%</td>
</tr>
<tr>
<td>USA</td>
<td>43%</td>
</tr>
<tr>
<td>Belgium</td>
<td>33%</td>
</tr>
</tbody>
</table>

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)

Top Holiday Types Preferred (share of preference)

<table>
<thead>
<tr>
<th>Holiday Type</th>
<th>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>

Base size: Experience Seekers n=2,081; Total Tier 1 n=5,893; global weighting applies
FRANCE 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)**: 25%
- **Mid-Range Tourists (5-7)**: 50%
- **Budget Tourists (1-4)**: 25%

**Experience Seekers** (France total traveller population)

- 25% 29% 50% 52% 25% 19%

LIVING

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

TREND ENDORSERS (vs total)

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

KEY PERCEPTIONS OF BRITAIN – HIGHEST DIFFERENCES:

- Offers experiences I want to share on social media (42%)
- Offers good value for money (27%)
- A place recommended by friends or family (36%)
- A good place for treating myself, e.g. Priority brands, gourmet food, etc. (36%)

COMPETING WITH SOME MORE UNIQUE DESTINATIONS (vs France total)

Disproportionately more likely to consider:

- USA (+10%)
- BELGIUM (+8%)
- PORTUGAL (+8%)
- NETHERLANDS (+7%)
- GERMANY (+6%)

**TYPES OF HOLIDAYS:**

<table>
<thead>
<tr>
<th>Experience Seekers</th>
<th>France total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seeing famous sites, places, ticking off the ‘must do’ list</td>
<td>16.7</td>
</tr>
<tr>
<td>Bespoke, unique, unusual experiences and adventures</td>
<td>15.1</td>
</tr>
<tr>
<td>Exploring, stimulating, learning or challenging yourself</td>
<td>14.4</td>
</tr>
<tr>
<td>Relaxing, resting, recharging</td>
<td>19.0</td>
</tr>
<tr>
<td>Visiting family and friends</td>
<td>65%</td>
</tr>
<tr>
<td>Familiar, comforting, reconnecting</td>
<td>65%</td>
</tr>
<tr>
<td>Spoiling/treating myself (and/or others)</td>
<td>13.2</td>
</tr>
<tr>
<td>High energy, action-filled fun times</td>
<td>9.8</td>
</tr>
</tbody>
</table>

**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%

**AGE**

- Modal age: 21 yrs
- Median age: 32 yrs

- 25% 5% 12% 23% 35%
- 18-24 25-34 35-44 45-54 55+

**VISITORS (vs total)**

- Britain Visitors (P5yrs) 37% (+3%)
- Considerers (P5yrs) 63% (-3%)

**GENDER**

- 52% 48%

*Modal age: 21 yrs*
FRANCE: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

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 FOR PLANNING:

<table>
<thead>
<tr>
<th>Resources Used</th>
<th>Experience Seekers</th>
<th>France total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Comparison Site</td>
<td>32%</td>
<td>33%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Specialists Travel Agent or Tour Operator</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

RESOURCES USED FOR INSPIRATION:

<table>
<thead>
<tr>
<th>Resources Used</th>
<th>Experience Seekers</th>
<th>France total traveller population</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>19%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
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<tr>
<td>Airline/Airline Holiday Companies</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Specialists Travel Agent or Tour Operator</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>14%</td>
<td>19%</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 BOOKING:

<table>
<thead>
<tr>
<th>Resources Used</th>
<th>Experience Seekers</th>
<th>France total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Comparison Site</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Specialists Travel Agent or Tour Operator</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>

TOOLS:

41% use more than one resource in the planning/booking phase of the customer journey vs 36% for other tourists from France.

<table>
<thead>
<tr>
<th>Resources Used</th>
<th>Experience Seekers</th>
<th>France total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Comparison Site</td>
<td>41%</td>
<td>33%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>31%</td>
<td>27%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Specialists Travel Agent or Tour Operator</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>

PACKAGE VERSUS SEPARATE BOOKINGS:

<table>
<thead>
<tr>
<th>Booking Options</th>
<th>Experience Seekers</th>
<th>France total traveller population</th>
</tr>
</thead>
<tbody>
<tr>
<td>I didn’t make the booking / can’t recall</td>
<td>7</td>
<td>12</td>
</tr>
<tr>
<td>I booked everything separately</td>
<td>31</td>
<td>33</td>
</tr>
<tr>
<td>I booked some, but not all elements together</td>
<td>35</td>
<td>29</td>
</tr>
<tr>
<td>I booked all key elements of the trip as one package</td>
<td>28</td>
<td>26</td>
</tr>
</tbody>
</table>

Booked:*  

<table>
<thead>
<tr>
<th>Via</th>
<th>Package</th>
<th>Travel</th>
<th>Accommodation</th>
</tr>
</thead>
</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.**
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>Budget Tourists (1-4)</td>
</tr>
<tr>
<td>Mid-Range Tourists (5-7)</td>
</tr>
<tr>
<td>Premium Tourists (8-10)</td>
</tr>
<tr>
<td>Experience Seekers</td>
</tr>
<tr>
<td>Budget Tourists (1-4)</td>
</tr>
<tr>
<td>Mid-Range Tourists (5-7)</td>
</tr>
<tr>
<td>Premium Tourists (8-10)</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

| GENDER | 45% | 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 shows 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 fulfill 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.

<table>
<thead>
<tr>
<th>Resources Used for Inspiration</th>
<th>Experience Seekers</th>
<th>Total Traveler Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Comparison Site</td>
<td>36%</td>
<td>38%</td>
</tr>
<tr>
<td>Peer Review Site</td>
<td>37%</td>
<td>37%</td>
</tr>
<tr>
<td>Online Marketplace</td>
<td>35%</td>
<td>30%</td>
</tr>
<tr>
<td>Online only Travel Agent or Tour Operator</td>
<td>34%</td>
<td>30%</td>
</tr>
<tr>
<td>Travel Agent via Personal Interaction</td>
<td>33%</td>
<td>29%</td>
</tr>
<tr>
<td>Specials Travel Agent or Tour Operator</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>Airline/Airline Holiday Companies</td>
<td>31%</td>
<td>26%</td>
</tr>
<tr>
<td>None of the Above</td>
<td>12%</td>
<td>8%</td>
</tr>
</tbody>
</table>

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.

WE asked about independent or package bookings, comparing the target segment with the total tourist population.

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

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

RESOURCES FOR PLANNING:
- Total traveller population
- Experience Seekers
- Price Comparison Site
- Online only Travel Agent or Tour Operator
- Online Marketplace
- Airline/Airline Holiday Companies
- Travel Agent via Personal Interaction
- Peer Review Site
- Specials Travel Agent or Tour Operator
- None of the Above

TOOLS:
- 63% use more than one resource in the planning/booking phase of the customer journey vs 55% other tourists

PACKAGE VERSUS SEPARATE BOOKINGS:
- Experience Seekers
- Total traveller population

PACKAGING 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