MIDAS: A Global Report

Motivations, Influences, Decisions and Sustainability in a Post-Pandemic Era

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Welcome to MIDAS

A foundational insight study on international traveller motivations, influences, decision-making, accessibility and sustainability

The purpose of this study is to explore the population of international leisure travellers in a post-pandemic environment in order to inform how best to inspire, convert and delight them – each of these elements driving accretive economic benefit to Britain via its tourism offering

We spoke to global tourists/prospective tourists in the following markets:

Australia, Austria, Belgium, Brazil, Canada, China, Denmark, France, Germany, Hong Kong, India, Ireland, Israel, Italy, Japan, Netherlands, New Zealand, Norway, Poland, Saudi Arabia, South Korea, Spain, Sweden, Switzerland, South-East Asia (Malaysia, Singapore, Thailand), UAE, USA

Fieldwork took place between 18th March and 23rd April

(93% complete by end of March, 7% into April)

Reporting includes a full array of data-inspired ‘chapters’

AGENDA

AGENDA

In this chapter, we will highlight the key forces impacting inbound tourism to Britain in 2022.

Distance is not a barrier when it comes to appetite to visit Britain, with long-haul markets in the Middle East, Asia and USA showing strong demand, but also desiring pan-European breaks or holidays.

Other **destinations can be clustered** in terms of stage in the customer journey, with only a handful showing signs of being much more difficult to convert.

Recent events (Brexit, COVID and economic after-effects) **have created a barrier** for some and those having already visited need a much stronger reason to return given the choice available now the world has re-opened.

Italy and Spain represent strong competitors (or partners), but Switzerland, USA and Australia are also key competitors, depending on the target market.

These findings are unable to be compared directly to the prior wave of this study, due to differences in question wording and structure.

Chapter Overview

Strong appetite to visit Britain in a post-pandemic world, with solid opportunities in attracting pan-European trips from long-haul markets

Who is travelling and how have recent events shaped desire to visit Britain?

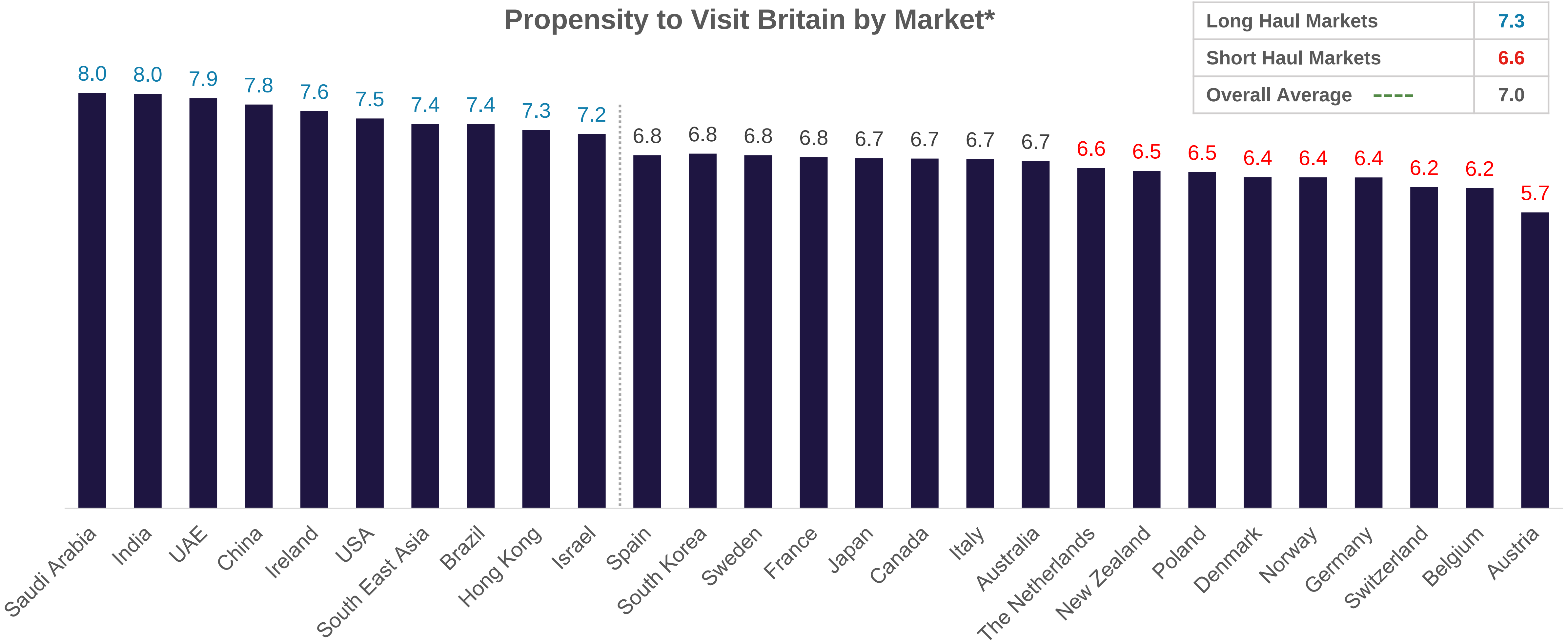
- **Desire to travel abroad for leisure is high in a post-pandemic world** and Britain is high on the list for global tourists, with the highest prospects lying beyond Europe.
- Whilst this is the case, there are **residual impacts of both COVID-19 and Brexit** that we need to be aware of and understand how they impact different prospects. For instance, we see that there is reduced consideration for travel generally amongst the 55yrs+ population generally, whilst we see a higher incidence of Brexit negativity from European markets.
- **85% of international travellers are 2 x vaccinated** against COVID-19; two thirds of whom have also received a booster jab. Vaccination status and propensity to travel are highly correlated – presumably driven by those most passionate about travelling again.
- The **COVID-19 residue** impacts prospective tourists primarily around concerns of **flexibility of bookings and ease of travelling** once at their destination, but **personal health and safety** is also now at the fore, requiring a different kind of conversation throughout the decision-making journey.
- Meanwhile, the **war in Ukraine** has caused additional instability. One in four consumers (24%) say it will not impact their travel, but at the time of fieldwork (March 2022), 37% indicated a reduced willingness to travel internationally, to Europe or Britain. Fortunately, the impact on the latter (Britain), sees only a 9% 'less likely to visit' impact.
- The Ukraine war seems to have **impacted younger consumers most** due to the disproportionate 'costs' (time and money) of global travel relative to their total disposable income.
- Finally, we see the **impact of perceptions of value for money remain a core barrier for Britain**, particularly in light of the imminent global recession. Fortunately, recent visitors to Britain have a significantly better impression of value for money, but this remains an Archilles Heel we need to address with relative urgency in a period of uncertainty and extremely high competition.


“Because I’ve been there before and there are other places I want to visit” (Brazil)


“Brexit, they just don't want me anymore” (Germany)


“Too crowded & expensive; not worth the price” (USA)
“They don’t wear masks with COVID-19” (South Korea)

Propensity to visit Britain varies by market, with the highest indicators seen in the Middle East



Long Haul Markets	7.3
Short Haul Markets	6.6
Overall Average ----	7.0

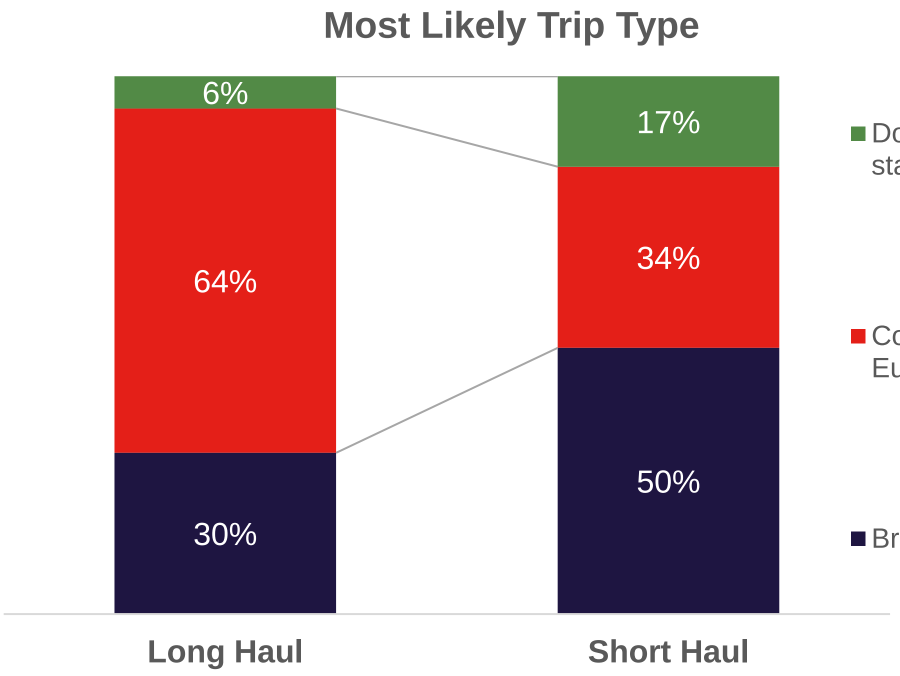
*Base is general population sample only; excludes boost of GB visitor; n=21,946; global weighting applied

D5: How likely is it that you will visit the following countries in the next 2 years for a holiday or short break? Please give a score between 1 and 10, where 1 would mean that you are not at all likely and 10 that you are very likely to visit that country in the next 2 years.
Blue numbers are statistically higher than the average; red are statistically lower @ 95% confidence

Long-haul represents a more pan-European opportunity

Whilst Britain is our focus, we need to remain highly conscious and empathetic to the desire of long-haul travellers to combine their trip with other European destinations

This means understanding both how to competitively position Britain perceptually, but also identifying ownable and 'unmissable' products, experiences and destinations.



Important note: these figures are intention only – other data pre-dating COVID suggests only 13% of international visitors combine a trip to Britain with another destination, so this shift might reflect either a new context, intention is much higher than behaviour, or both.

D6: You gave Britain a score of 6 or higher in terms of likelihood to visit in the next 2 years.
Which of the following is most likely to be true when thinking about a future break or holiday to Britain?
Base: those scoring 6+ on D5. Propensity to visit Britain; n=17,035; Long Haul n=10.301; Short Haul n=6,734,

Developing a proxy for market prioritisation

What can we learn from mapping and clustering the markets in terms of desire to visit Britain alongside probably urgency?

Whilst all markets are a focus for Britain, tourism appetite varies significantly, both in terms of **DESIRE/ DEMAND** as well as **PRIORITY/ URGENCY.**

We are able to create proxy measures of both of these dimensions in order to help identify different priority clusters.

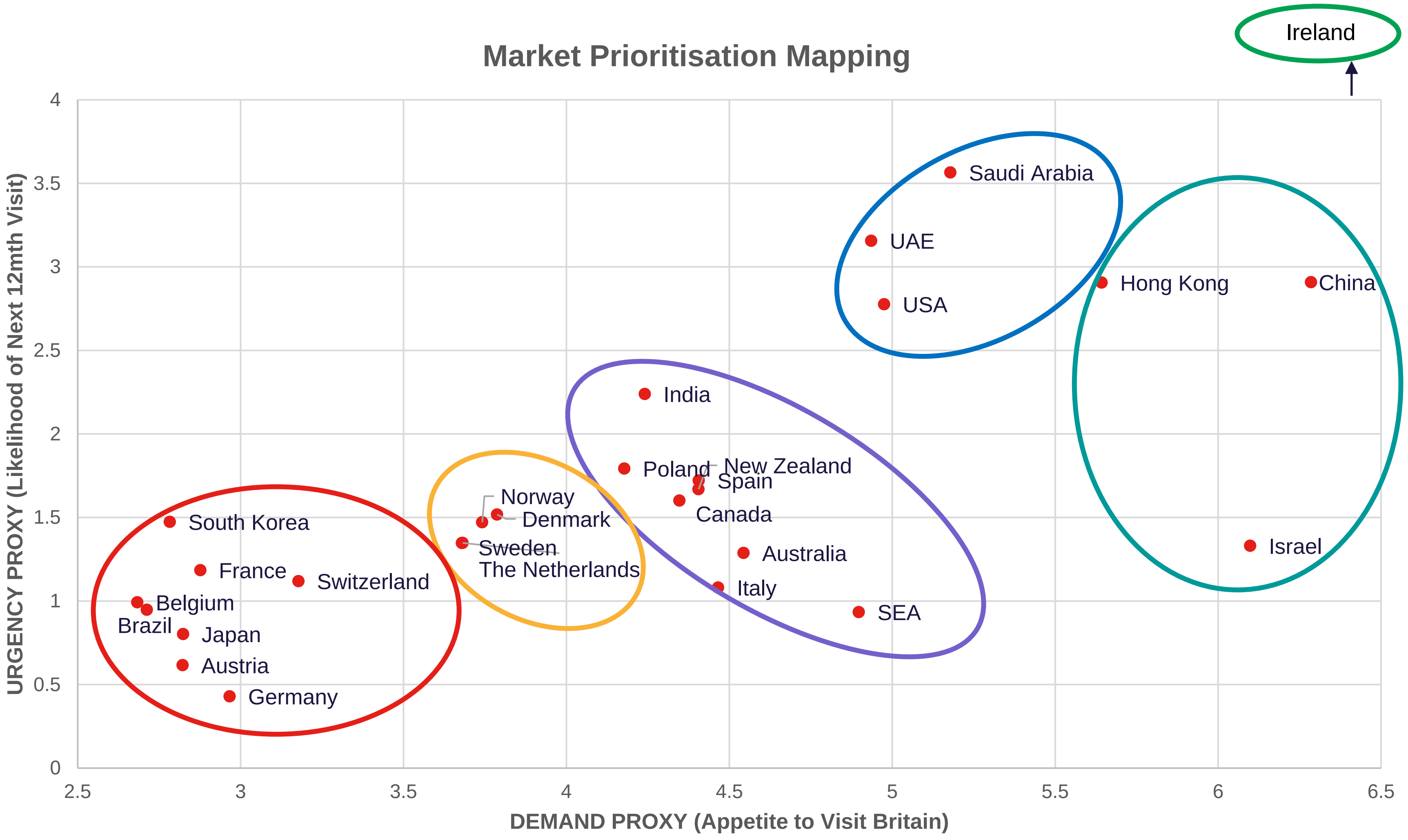
DESIRE/ DEMAND

A combination of % CONSIDERING Britain in the next 5 years and Propensity to Visit in the next 2 years.

PRIORITY/ URGENCY

A combination of % of Considerers who say they will visit Britain in the next 12 months and the rank order of next 12 month stated intention relative to other competitors (higher = more likely to actually visit in the next 12 months)

Mapping these two dimensions informs potential market prioritisation and these patterns are consistent at both a total and Buzzseeker level



- Immediate & strong conversion opportunity
- Strong immediate potential (may need to focus on urgency in Israel)
- Potent opportunity – may need longer planning & seeding lead-time
- Solid opportunity, but need to dial up a need for commitment
- Lower interest markets – need to create targeted reason to visit
- Most vulnerable to our stronger competitors – may require niche offers or communications

Mapping of Demand & Urgency proxy measures (see previous page for full explanation): Question sources: C4. Consideration (including screen-outs); C6. When visit Britain; D5. Propensity to visit Britain

AGENDA

Value, welcoming, ability to roam and relax are key global drivers when tourists are choosing a destination to visit, but we do see important regional and cultural differences.

Middle Eastern tourists look for places which are inclusive and allow them to tick things off their 'must do' lists.

Western European visitors demand a variety of interesting people, experiences and food & beverage options and these needs seem more distinctive than drivers in the other European regions.

Visitors from the Americas seem to be full of energy – they are NOT looking for rest and relaxation, but destinations packed with loads to see and do and represent a wide range of diverse experiences in one place.

This footprint of drivers is quite similar to **Australasian tourists** who are also more dynamic in their needs and look for single destinations offering a variety of ('must see') experiences.

North-East Asian tourists are inclined to choose destinations based more around strong reputation for food and drink options but are also more drawn to vibrant places. For them, value for money is less critical in choice of destination.

Chapter Overview

Value for money leads as the key driver for destination selection in 2022, which is supported by being welcoming and a place to roam to enjoy diverse sites and experiences as well as enjoy rest & relaxation

Value for money, welcoming and freedom to explore are key global drivers of destination choice in 2022

D3. Please tell us how important each of the following considerations are in choosing a destination for an international break or holiday?
(7 point-scale where 7 = ‘extremely important’ and 1 = ‘not at all important’; Blue figures are significantly higher; Red significantly lower
Base N=22,840 Weighted global

Value for money is less of a consideration for North-East Asian tourists where food, drink & vibrant places are more important

		NORTH-EAST ASIA				SOUTH-EAST ASIA
		CHINA	HONG KONG	JAPAN	SOUTH KOREA	
TOP 6 DRIVERS IN RANK ORDER	Offers good value for money	✗	✓	✗	✗	✓
	Is a welcoming place to visit	✗	✗	✓	✓	✓
	I can roam around visiting many types of places	✗	✓	✓	✓	✓
	Is good for relaxing, resting, recharging	✓	✓	✓	✓	✓
	There is beautiful coast and countryside to explore	✓	✗	✗	✓	✗
	It's easy to get around once there	✗	✓	✓	✓	✗
UNIQUELY IN TOP 6 DRIVERS	**DRIVERS UNIQUE TO EACH MARKET'S TOP 6 (IN RANK ORDER)**	*There is a good variety of food and drink to try*	*There is a good variety of food and drink to try*	*There is a good variety of food and drink to try*	*There is a good variety of food and drink to try*	*Offers lots of different experiences in one destination*
		Is good for seeing famous sites, places, ticking off the 'must do' list	*It's easy to get to*			*It's easy to get to*
		There are vibrant towns and cities to explore		*There are vibrant towns and cities to explore*		
		Has an interesting mix of cultures from around the world				
OTHER UNIQUE SKEWS*	**OTHER UNIQUE SKEWS BEYOND THE TOP 6 GLOBAL AND MARKET DRIVERS**	*Everything except value for money*	*A good place for treating myself, e.g. premium brands, gourmet food, etc.*	*Has a thriving arts and contemporary culture scene*	*If I don't visit soon I'd miss out*	*Everything!*
			Offers experiences I want to share on social media	*A good place for treating myself, e.g. premium brands, gourmet food, etc.*	*Has a thriving arts and contemporary culture scene* *A good place for treating myself*	

*Not in Top 6 drivers, but uniquely strong and relevant to that market (where not included, nothing stands out)

AGENDA

Britain is perceived as being a place where **history and heritage meet modernity and vibrancy.**

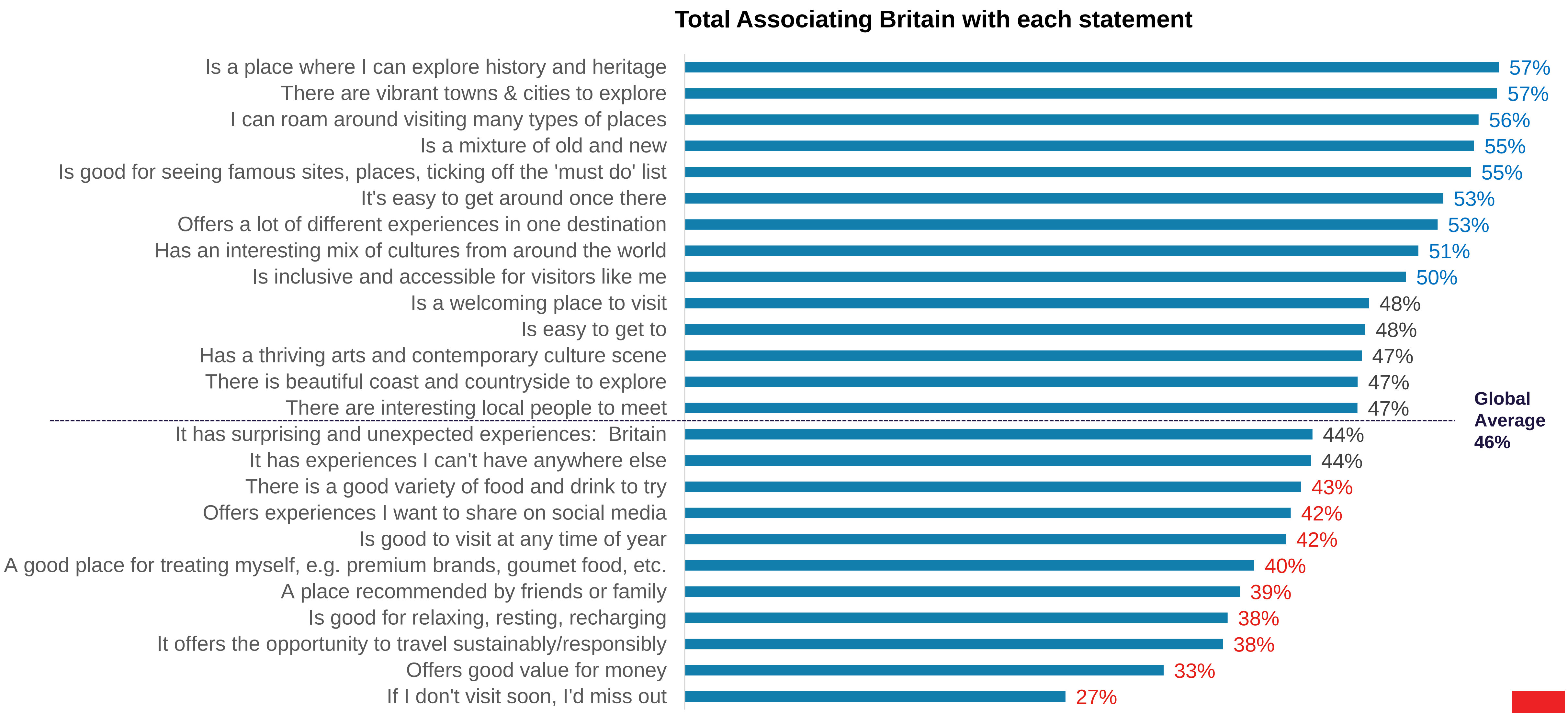
It is seen as a place that offers a great deal of **diversity of sites and experiences, including the key ‘must see’ sites, in one destination.**

This perception **varies significantly between short and long-haul markets**, as European countries, rich in their own history, are more inclined to see Britain as offering the ‘vibrant’ side of the equation.

Chapter Overview

Strong and consistent perceptions of Britain lie in it being a place where history meets modernity and a range of sites and (‘must-see’) experiences are offered within easy access

Perceptions of Britain post-pandemic are dominated by the combination of history and vibrancy; the old and new



E1. Below, are some statements which may relate to destinations you might consider for a break or holiday abroad.
Please indicate which destinations you associate with the following statements. You can choose as many or as few as you like for each statement or select 'none of these' if you don't think it applies to any destination.; Base N=22,840; global weighting

Perceptions of Britain in Europe/short-haul

GLOBAL RANK	TOP PERCEPTIONS OF BRITAIN	RANK ORDER WITHIN MARKET: AUT	BEL	NED	DEU	FRA	SWZ	POL	DNK	NOR	SWE	ITA	ESP	IRE
1	Is a place where I can explore history and heritage	3	8	6	2	5	2	6	8	9	11	2	5	5
2	There are vibrant towns & cities to explore	1	1	1	1	6	1	1	1	2	1	7	9	6
3	I can roam around visiting many types of places	7	2	2	3	3	4	10	2	6	5	4	4	3
4	Is a mixture of old and new	6	6	3	8	11	8	7	3	7	8	5	3	9
5	Is good for seeing famous sites, places, ticking off the 'must do' list	2	4	4	5	4	6	4	10	11	6	1	1	8
Not in global top 3, but in country Top 3	*An interesting mix of cultures from around the world*		*3*					*2*				*3*	*2*	
	It's easy to get around once there					*1*				*3*				*2*
	It's easy to get to									*1*	*2*			*1*
	Is inclusive and accessible for visitors like me										*3*			
	Is good to visit any time of year					*2*								
	There are interesting local people to meet							*3*						
	Offers a lot of different experiences in one destination						*3*							

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Perceptions of Britain in the rest of the world/long-haul

		RANK ORDER WITHIN MARKET													
GLOBAL RANK	TOP PERCEPTIONS OF BRITAIN	AUS	NZ	CHN	HKG	JAP	KOR	IND	SEA	USA	CAN	BRA	SAU	UAE	ISR
1	Is a place where I can explore history and heritage	1	2	1	1	1	2	4	1	1	1	1	1	2	1
2	There are vibrant towns & cities to explore	6	8	5	11	4	7	7	5	2	4	12	5	5	6
3	I can roam around visiting many types of places	4	3	6	4	5	3	2	4	6	5	2	4	14	2
4	Is a mixture of old and new	2	1	4	3	3	4	9	2	4	2	5	6	1	8
5	Is good for seeing famous sites, places, ticking off the 'must do' list	3	4	2	6	6	1	3	3	3	3	4	16	3	9
Not in global top 3, but in country Top 3	*An interesting mix of cultures from around the world*												*2*		
	It's easy to get around once there				*2*										
	Has a thriving arts and contemporary culture scene					*2*									
	Offers experiences I want to share on social media											*3*			*3*
	There is a good variety of food and drink to try							*1*							
	A good place for treating myself (e.g., premium brands, gourmet food, etc.)			*3*									*3*		

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kubi kalloo

A summary of key learnings when it comes to how international tourists see Britain and the implications for how we speak to them

We observe patterns of consistency, but also variance when it comes to perceptions of Britain.

Within Europe/Short-Haul markets, there are more pockets of variation, whilst long-haul markets share more commonality in terms of core perceptions, but also require some unique areas of 'flex' when it comes to different cultures and specific markets.

SHORT-HAUL MARKETS

France & **Ireland** share commonalities as the two 'closest' neighbours where speaking to ease/ convenience and fringe season travel aligns with existing perceptual strengths

In **Southern Europe,** Britain stands out as a mix of old and the new; a place of cultural diversity, uniqueness and must-visit sights and places (much like themselves)

In **Norway** & **Sweden**, the idea of Britain as inclusive and easy access to vibrant towns and cities is most dominant

The other **European countries** see Britain as offering vibrant towns & cities, diversity, culture, famous sights and the opportunity for easy exploration and discovery – more similar to long-haul markets

LONG-HAUL MARKETS

Long-haul markets or 'rest of the world' see Britain more consistently as offering heritage & history, the ability to roam and explore a broad mix of 'must-do' experiences (both old & new

WITH IMPORTANT FLEXES REQUIRED IN…

Saudi & China see Britain as a place for 'premium' products, services & experiences

Contemporary arts & culture is a unique perception for Japanese tourists

Food & drink variety is a strong perception held in India

Brazil & Israel see Britain as a great place for social media 'snappability' & sharing

How does this compare to competitors?

Where are our relative perceptual strengths and weaknesses?

Compared to the other markets (considerers base*), Britain has no 'first place' ranks, but competes strongly on the idea of accessible juxtaposition of history and modernity. Value for money stands out as a distinctive issue.

% Association at a Global Level	Britain	Australia	France	Germany	Ireland	Italy	Spain	USA
Is a place where I can explore history and heritage	57%	39%	59%	51%	54%	63%	37%	37%
There are vibrant towns and cities to explore	57%	51%	58%	52%	49%	61%	53%	53%
I can roam around visiting many types of places	56%	52%	57%	51%	55%	60%	51%	51%
Is a mixture of old and new	55%	38%	55%	49%	50%	58%	38%	38%
Is good for seeing famous sites, places, ticking off the 'must do' list	55%	50%	59%	46%	46%	60%	51%	51%
It's easy to get around once there	53%	54%	49%	49%	40%	46%	46%	46%
Offers a lot of different experiences in one destination	53%	52%	53%	46%	49%	56%	53%	53%
Has an interesting mix of cultures from around the world	51%	47%	44%	39%	33%	41%	54%	54%
Is inclusive and accessible for visitors like me	50%	51%	47%	47%	48%	51%	51%	51%
It's easy to get to	48%	53%	51%	51%	40%	50%	40%	40%
Is a welcoming place to visit	48%	52%	44%	44%	54%	56%	48%	48%
Has a thriving arts and contemporary culture scene	47%	39%	55%	41%	35%	53%	40%	40%
There is beautiful coast and countryside to explore	47%	61%	54%	32%	61%	61%	46%	46%
There are interesting local people to meet	47%	50%	45%	43%	57%	54%	45%	45%
It has surprising and unexpected experiences	44%	47%	45%	41%	49%	47%	45%	45%
It has experiences I can't have anywhere else	44%	48%	47%	40%	51%	51%	46%	46%
There is a good variety of food and drink to try	43%	48%	59%	44%	41%	65%	48%	48%
Offers experiences I want to share on social media	42%	51%	46%	40%	41%	47%	48%	48%
Is good to visit at any time of year	42%	54%	45%	41%	37%	52%	51%	51%
A good place for treating myself, e.g. premium brands, gourmet food, etc.	40%	43%	56%	36%	28%	55%	46%	46%
A place recommended by friends or family	39%	48%	40%	34%	36%	46%	42%	42%
Is good for relaxing, resting, recharging	38%	61%	48%	38%	47%	57%	41%	41%
It offers the opportunity to travel sustainably/responsibly	38%	50%	38%	40%	36%	37%	41%	41%
Offers good value for money	33%	51%	34%	37%	35%	43%	39%	39%
If I don't visit soon, I'd miss out	27%	33%	26%	24%	26%	29%	32%	32%

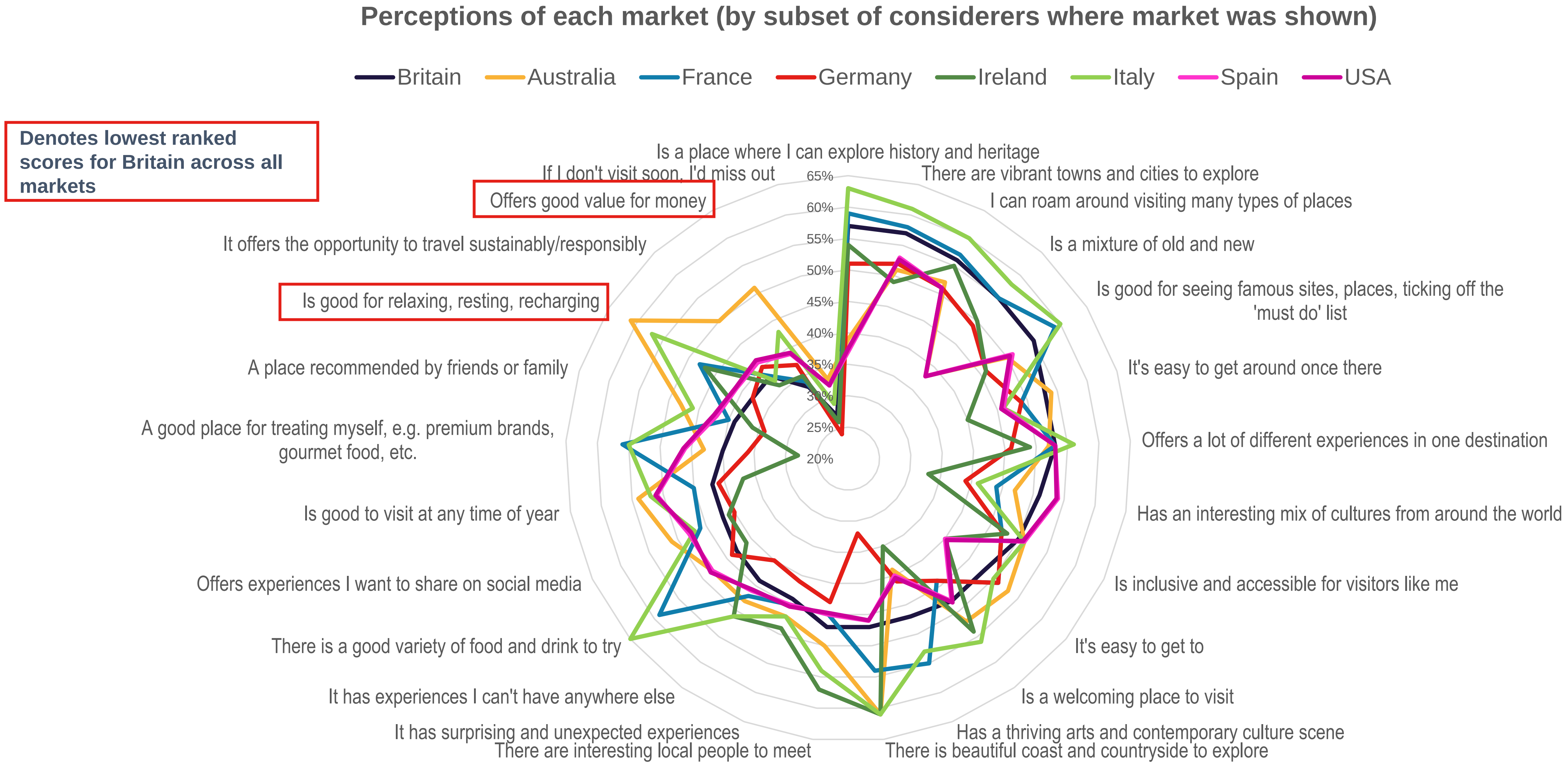
**The revised base for each competitor now includes only considerers of each destination*
Note, however, different competitors were shown to different markets (some with higher positivity bias)

Legend:

- 1st rank
- 2nd rank
- 3rd rank
- Lowest rank

E1. Below, are some statements which may relate to destinations you might consider for a break or holiday abroad.
Please indicate which destinations you associate with the following statements. You can choose as many or as few as you like for each statement or select 'none of these' if you don't think it applies to any destination.; Bases global weighting applied (IPS value). Base sizes considerers 21896 1386, 15668, 13216, 8036, 6077, 4766

Comparative strengths and weaknesses



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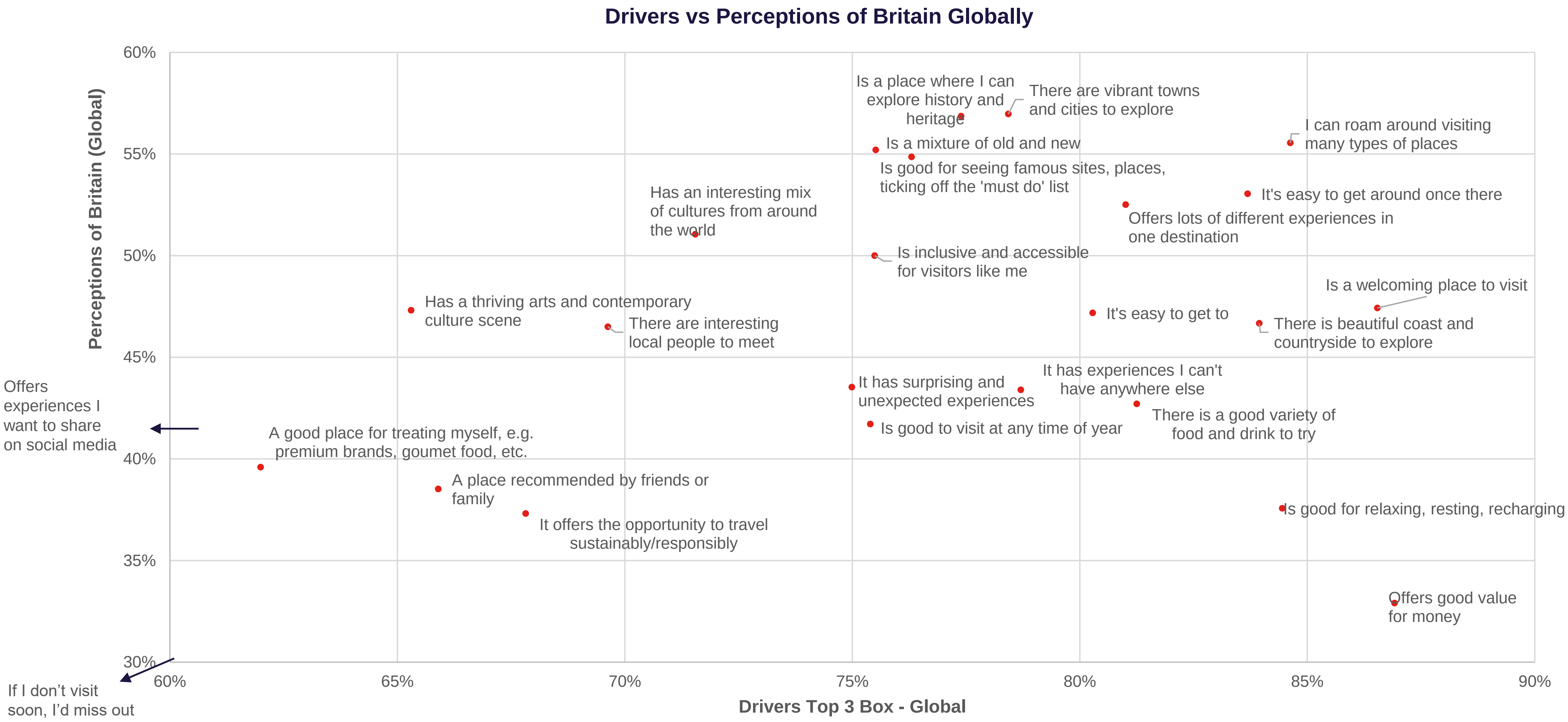
Combining Drivers and Perceptions

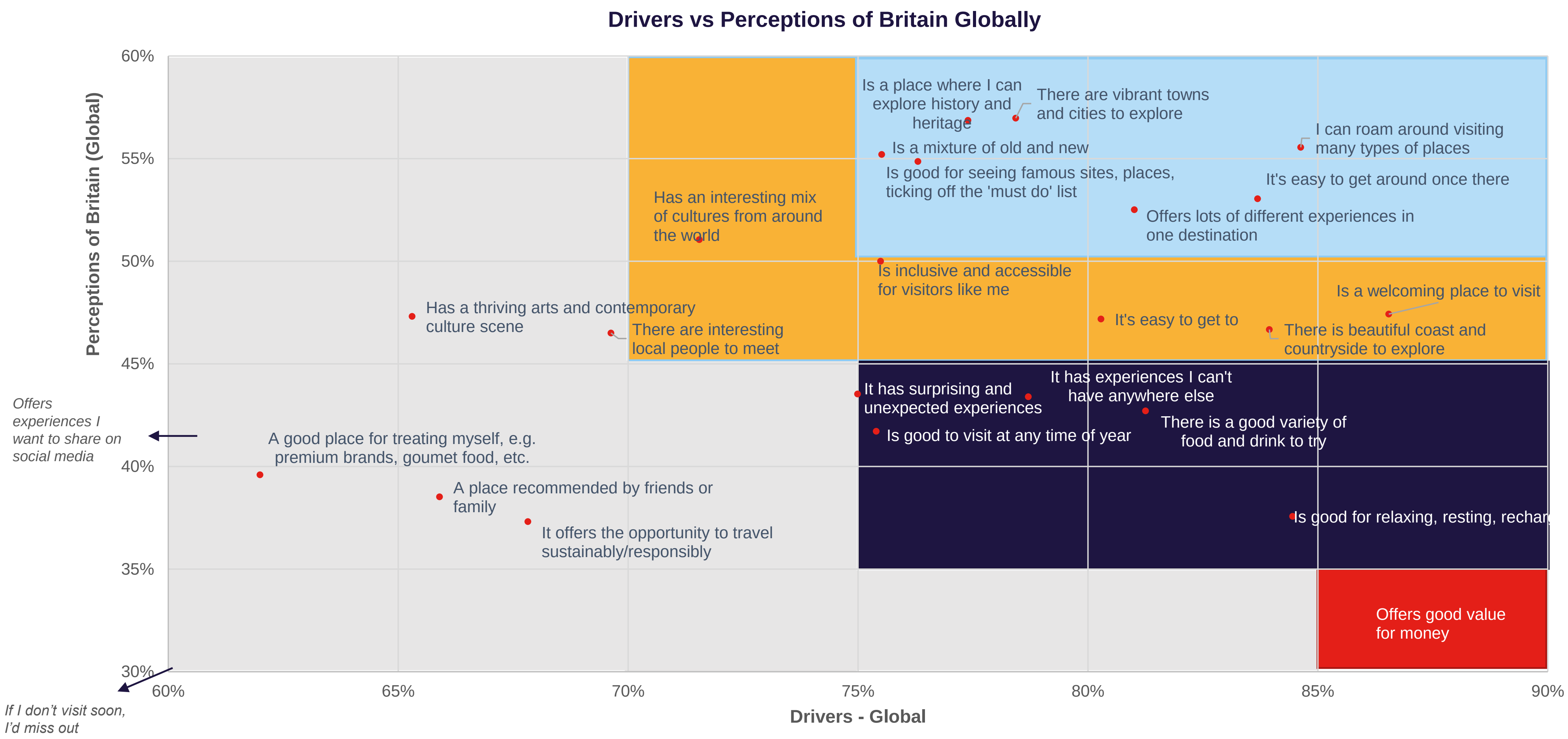
How well does the perception of Britain deliver to the needs of international travellers in choosing a destination?

Mapping drivers against perceptions of Britain allows us to identify a global hierarchy of brand 'hooks'



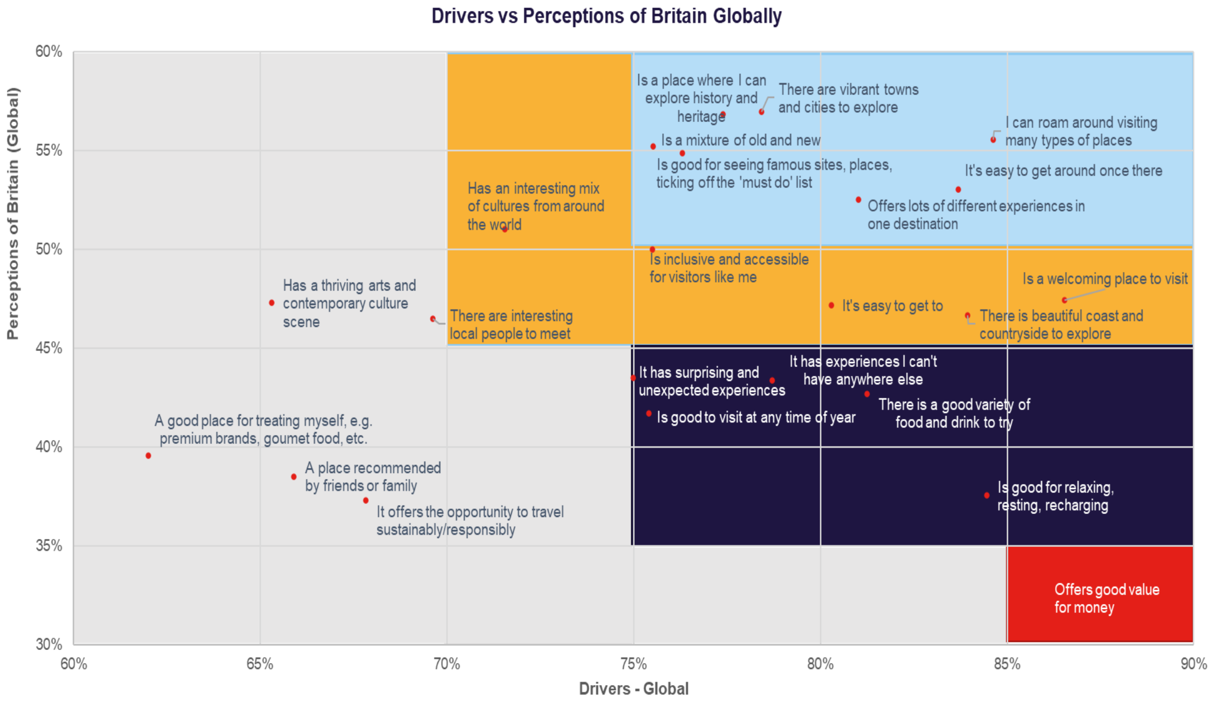
E1. Britain perceptions mapped against D3. Drivers for International Tourists; Total base size N=22,840; Global weighting applied

Mapping drivers against perceptions of Britain allows us to identify a global hierarchy of brand 'hooks'



E1. Britain perceptions mapped against D3. Drivers for International Tourists; Total base size N=22,840; Global weighting applied

The hierarchy of brand hooks explained



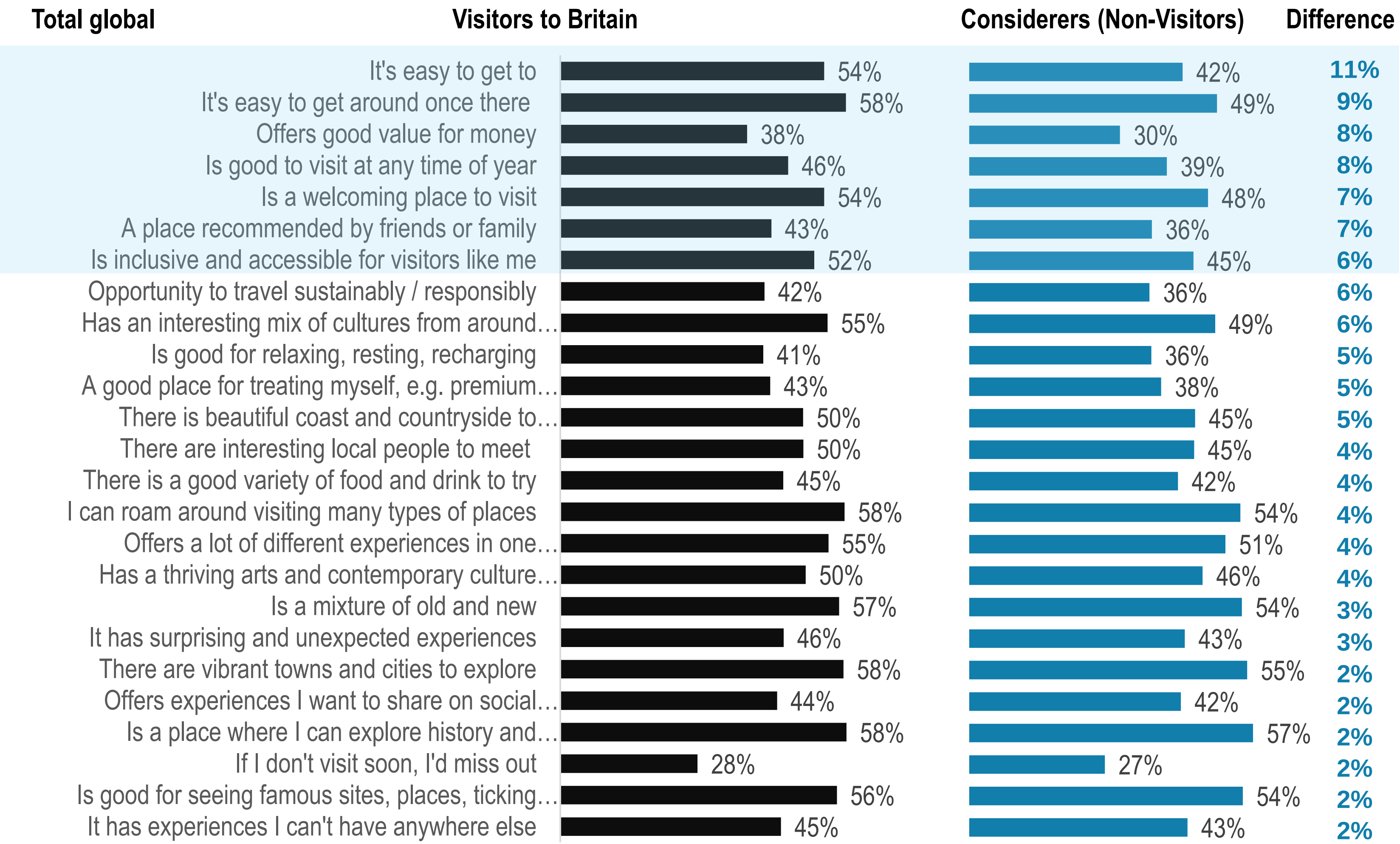
Flex by Market	‘BEST IN’ FLEXES
Additional Scope to Differentiate	UNIQUE & UNEXPECTED
Seductive Warmth	INVITING WARMTH
Strong Foundation	FREEDOM TO EXPERIENCE
Achilles Heel	POOR VALUE FOR MONEY

How do perceptions compare to the experience of visiting Britain?

What can we learn from looking at how visitors perceive Britain versus considerers?

The perception of Britain with convenience, value for money, for any time of year and welcoming & inclusive are much stronger amongst visitors to Britain

Associations with Britain – (global)



Where ease of getting to isn't that different between long and short haul markets!	Long haul	Short haul
It's easy to get to (visitors)	52%	56%
It's easy to get to (non visitors)	42%	44%
Gap	**+10**	**+13**

Suggested areas to leverage or perceptions to overcome are strongly linked to COMFORT – logistically easier than expected and emotionally warmer. Both are likely to be increasingly important in a post-pandemic world.

E1: Below, are some statements which may relate to destinations you might consider for a break or holiday abroad.Please indicate which destinations you associate with the following statements. Bases: Visitors: N=8,497; Considerers N=14,343; global weighting applied

AGENDA

Holiday types taken vary by region and segment, as does **interest in different products and experiences.**

When viewed in aggregate, these differences look quite subtle, but this is because tourists are **hungry for a combination of experiences** on an international holiday or break.

At the same time, the subtle differences in these patterns illustrates **clear product development and marketing opportunities** to captivate different traveller types.

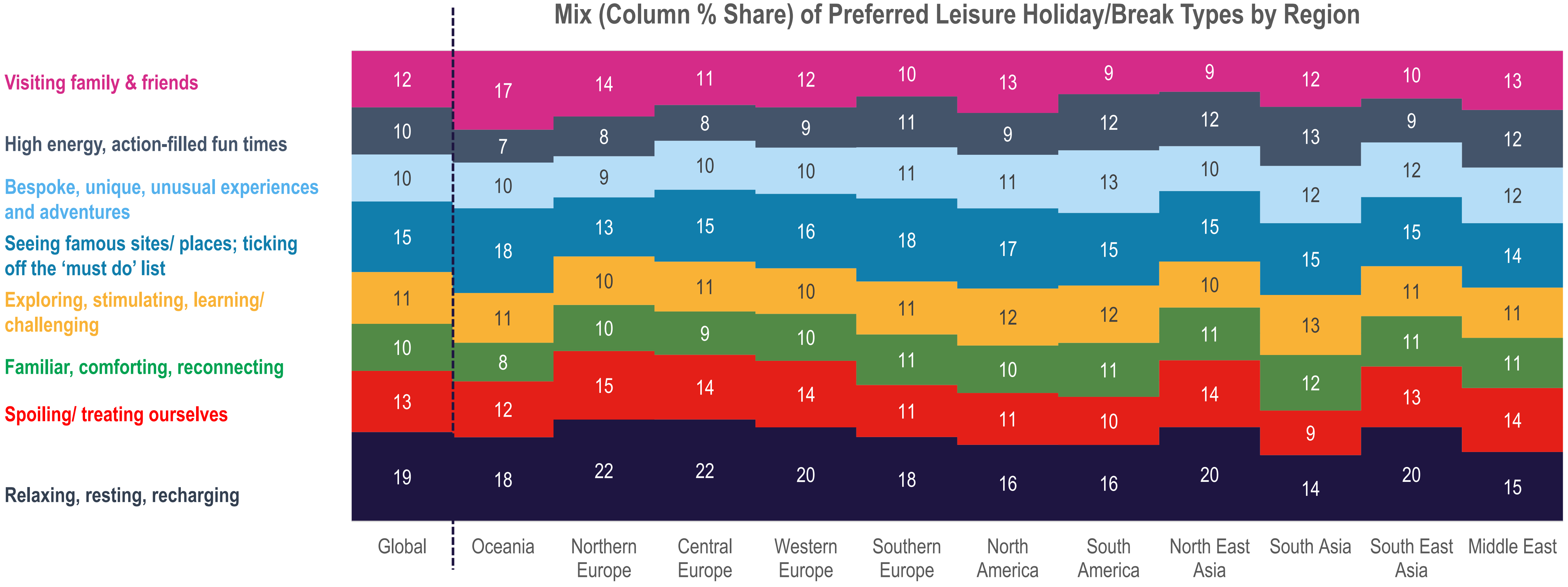
This information can be **used as a proxy to estimate desire** for any combination of product experiences or offers by market or targeted segment.

Chapter Overview

There are subtle, but important nuances in terms of desired holiday types and products that fulfil them by both region and segment

We see different energies across regions when it comes to preference for different types of leisure breaks

The following chart illustrates the proportionate mix (by column) of holiday/vacation types by region and use this, in combination with other stated motivations to summarise implications later in this chapter. Within country, these differences are even stronger.



D1. There are many different types of *holidays and leisure breaks that people like to take.
We have created a list of different types of holidays based on their overall mood and the motivations people have told us about.
We would like you to imagine you have 100 points you can allocate across the different holiday types based on your preference when it comes to leisure breaks and holidays in the next two years.
Please allocate the 100 points across the different holiday types – the number at the bottom will automatically add so you can see how many points are left for you to allocate.

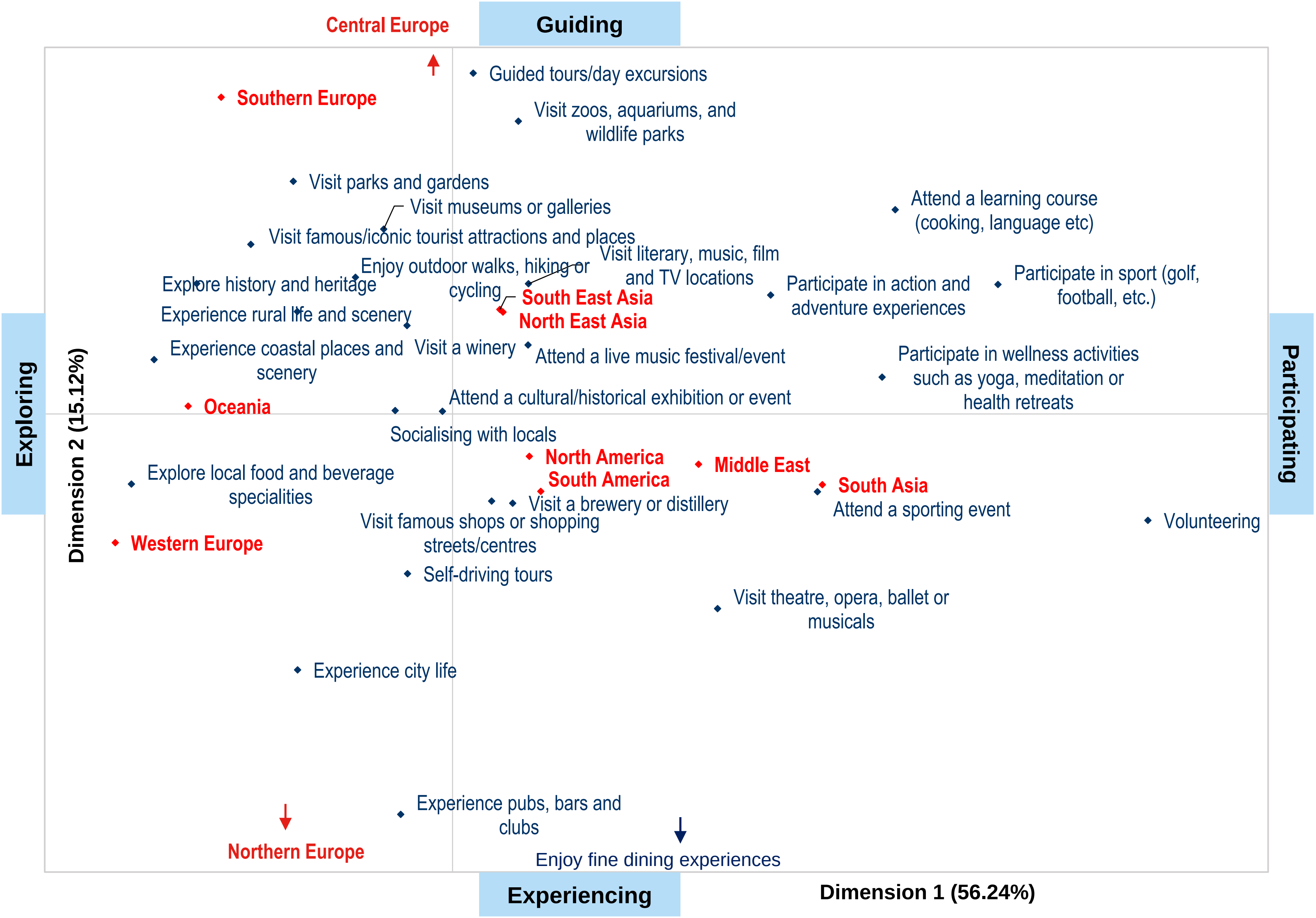
Very marginally, social and cultural activities are most distinctively sought when visiting Britain

The fact that these differences are, perhaps, smaller than anticipated, however, suggests that tourists **desire a wide variety of products and experiences *independent* of their chosen destination.**

DESIRED EXPERIENCES FOR TRIPS TO.... (Top 3 Box interest)	Britain	Abroad	DIFF
Experience coastal places and scenery	68%	70%	-2%
Explore local food and beverage specialties	68%	70%	-2%
Visit famous/iconic tourist attractions and places	65%	64%	1%
Explore history and heritage (historical sites, architecture)	64%	61%	2%
Visit parks and gardens	58%	56%	2%
Experience rural life and scenery	58%	58%	0%
Experience city life	58%	55%	3%
Enjoy outdoor walks, hiking or cycling	55%	56%	-1%
Visit famous shops or shopping streets/centres	54%	52%	2%
Visit museums or galleries	54%	51%	3%
Enjoy fine dining experiences	52%	52%	1%
Attend a cultural/historical exhibition or event	52%	49%	3%
Guided tours/day excursions	50%	48%	1%
Socialising with locals	49%	48%	1%
Visit zoos, aquariums, and wildlife parks	48%	50%	-2%
Self-driving tours	47%	47%	-1%
Experience pubs, bars and clubs	46%	43%	3%
Attend a live music festival/event	45%	44%	1%
Visit literary, music, film and TV locations	44%	41%	3%
Participate in action and adventure experiences	42%	42%	1%
Visit a winery (e.g. wine tasting/ vineyard tour)	42%	42%	0%
Visit theatre, opera, ballet or musicals	40%	37%	3%
Visit a brewery or distillery	40%	38%	1%
Attend a sporting event	36%	34%	2%
Participate in wellness activities such as yoga, etc.	32%	33%	-1%
Attend a learning course (cooking, language etc)	31%	31%	0%
Participate in sport (golf, football, etc.)	29%	29%	0%
Volunteering	25%	26%	0%

D2. Below, are a list of things you might like to do when taking a break or holiday abroad. Top 3 Box scores indicated on 10-point interest scale
Please indicate how much you might like to do each on a break or holiday in Britain
Please indicate how much you might like to do each on a break or holiday abroad
Bases: Britain n=10,764; Abroad n10,767; global weighting applied

There are regional differences to note, however, which align to desired holiday patterns



More distinctive patterns include:

- **Northern Europeans** more drawn towards food & beverage and city experiences
- **Western Europeans** and **Oceania** visitors enjoying 'localised' offers, including costal and rural experiences
- **Southern** and **Central Europeans** happy to fulfil more traditional 'touristic' activities
- **Indian** visitors strongly aligned to sporting event attendance
- **South & North-East Asian** visitors enjoy being at the heart of experiences they've seen or heard about, particularly when it comes to culture, arts & music

D2. Correspondence map illustrating interest in activity types by region – relative differences mapped
Arrows indicate regions or activities beyond the current perimeter of the map, showing direction of their placement

AGENDA

Visitors to Britain are very similar to global tourists generally in terms of profile, with two interesting differences. They are more likely to be Buzzseekers and they are **more likely to be ‘uber-affluent’** (based on subjective self-evaluation).

The vast **majority of trips to Britain are taken with partners/spouses**, although trips with children are more popular, particularly for Indian, Saudi Arabian and Emirati visitors.

Tourists from New Zealand and Australia enjoy by far the longest stays in Britain, (likely to get value from the long travel!), yet those from **China, the Middle East and USA may be higher spenders.**

Britain’s visitors are still centred around England and London, so a **huge opportunity remains to convert them to multi-country visits** within Britain which has a significant impact on length of stay and revenue potential.

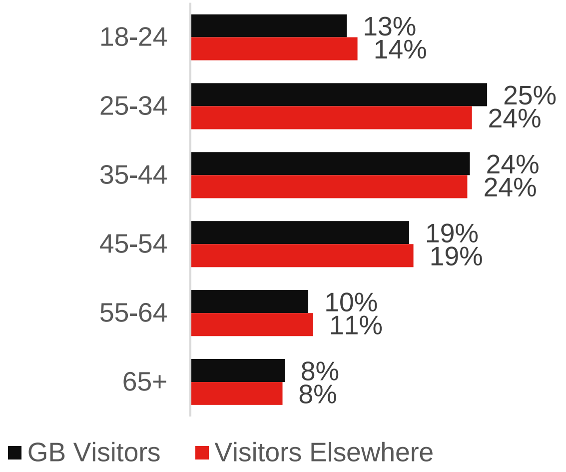
Trips to Britain are more likely to involve **seeing the ‘must see’ sites** and **NOT relaxing and recharging which is currently a competitive weakness.**

Chapter Overview

A slightly different traveller type with important market differences and an enormous opportunity to expand their geographic and economic footprint once in Britain

The profile of visitors to Britain in the past 5 years shows a higher proportion of Buzzseekers (a priority segment) and more affluent visitors than those visiting elsewhere

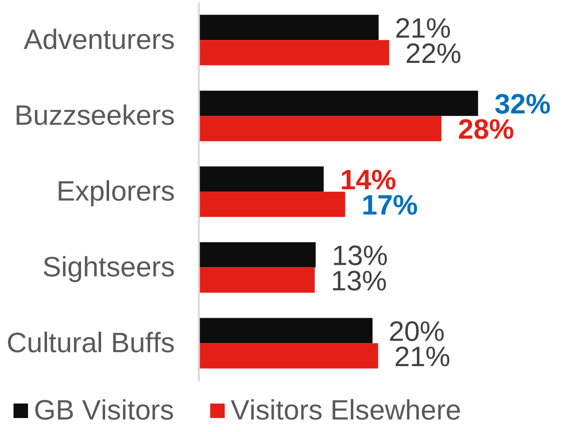
AGE PROFILE:



GENDER

	GB Visitors	Visitors Elsewhere
Male	51%	48%
Female	48%	51%
Other response*	<.5%	<.5%

SEGMENT:



FINANCIAL SELF-ASSESSMENT:

£

£££

	GB Visitors	Visitors Elsewhere
Constantly struggle to make ends meet, so can't always afford to do what we'd love to do	15%	15%
Have a lot to cover with our income/savings, so an international trip requires a lot of saving and planning	**27%**	**32%**
Fortunate to be able to take breaks/holidays abroad with a bit of planning	42%	42%
Lucky to not have to worry about finances, so we are able to splash out on trips abroad as I/we wish	**16%**	**12%**

There are no differences when it comes to life-stage, LGBTQ+ identity or accessibility needs between Britain Visitors and those who are Visitors Elsewhere

*The **self assessment of affluence** is used as income is not readily comparable across markets, nor is it a particularly good proxy for tourism spend.*

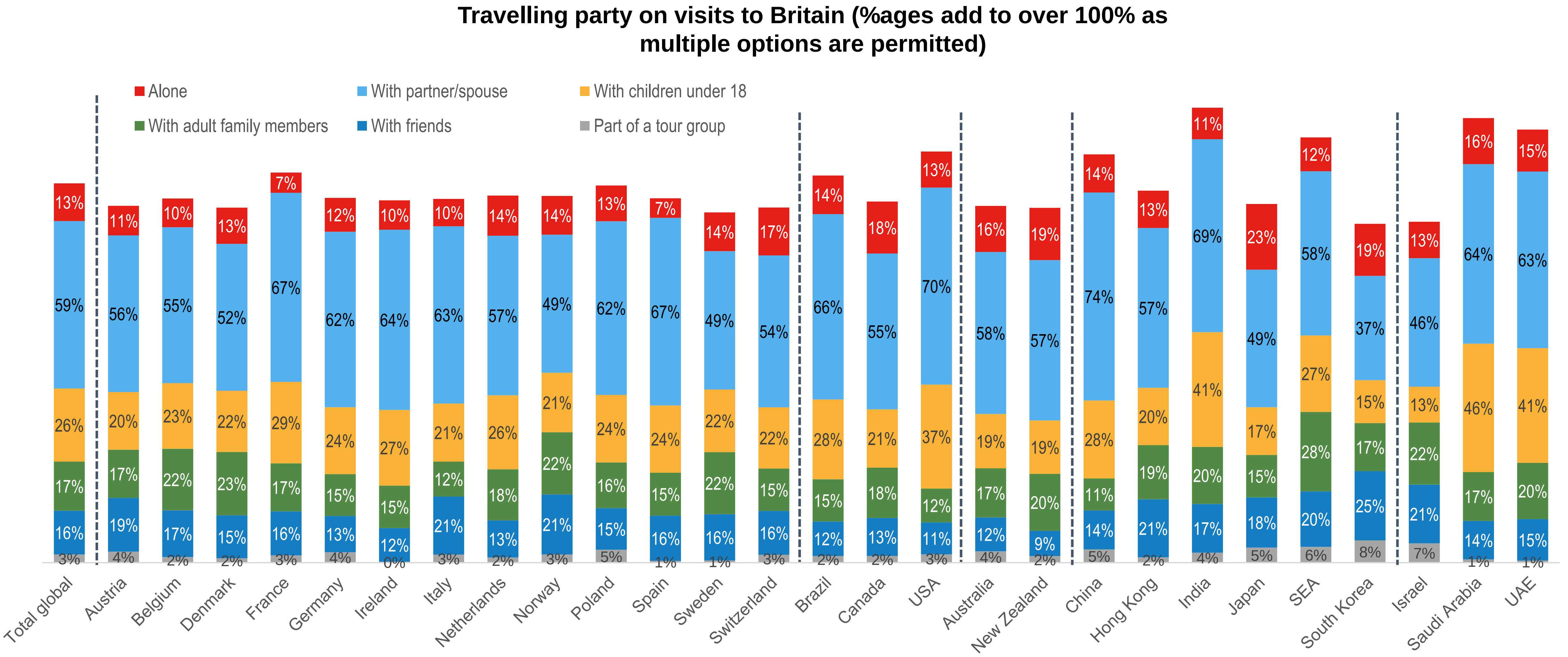
*Attracting a **more affluent tourist** is in-line with the low perceptions of Value for Money we have already observed.*

A2. Please tell us how old you are
A3. Which of the following gender classifications best describes you? (*Other response includes "I prefer to be described in another way" and "Prefer not to say")
J3 Which of the following best describes your current financial situation when it comes to things like taking leisure breaks or holidays like the ones we have been asking about today?
Segments based on section B as per global algorithm; Base sizes: GB Visitors n=8,497; Visitors Elsewhere n=9,662

Blue = significantly higher than comparative cell @ 95% confidence
Rad = significantly higher than comparative cell @ 95% confidence

kubi kalloo

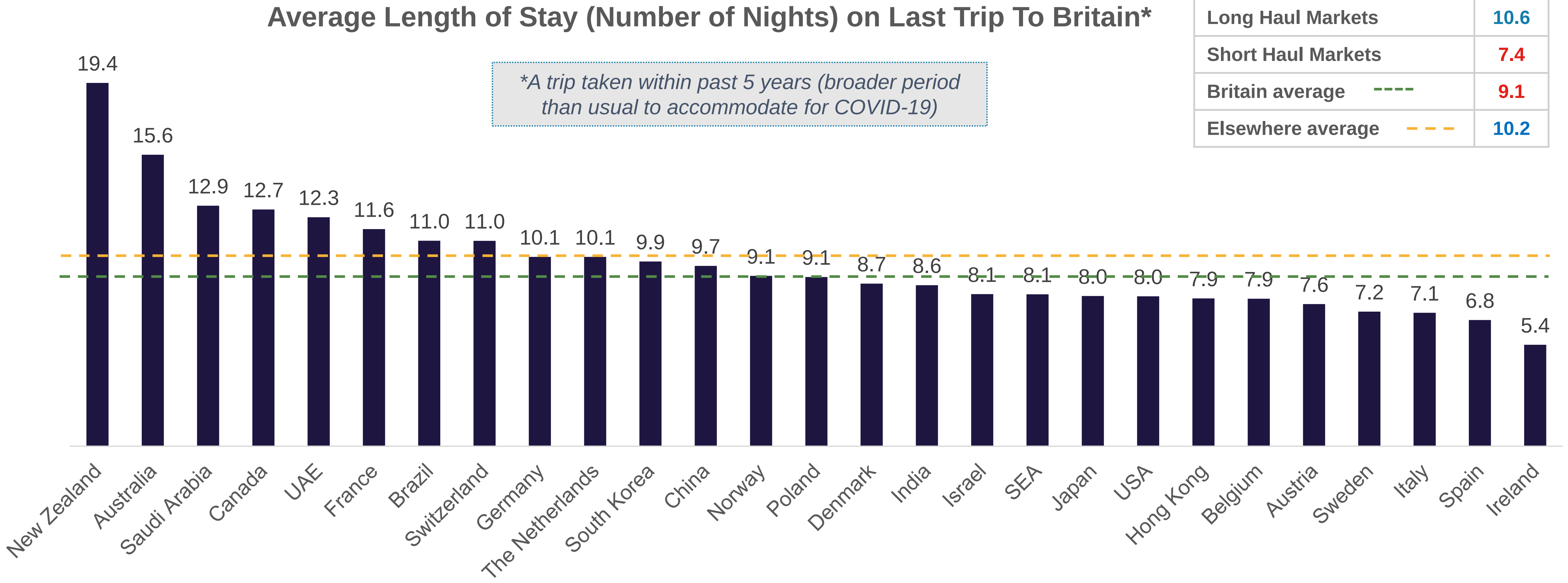
Travelling to Britain as a couple is most common, although visitors from Saudi, UAE, India and USA are most likely to visit with children



	Alone	With partner/spouse	With children under 18	With adult family members	With friends	Part of a tour group
Total global	13%	59%	26%	17%	16%	3%
Austria	11%	56%	20%	17%	19%	4%
Belgium	10%	55%	23%	22%	17%	2%
Denmark	13%	52%	22%	23%	15%	2%
France	7%	67%	29%	17%	16%	3%
Germany	12%	62%	24%	15%	13%	4%
Ireland	10%	64%	27%	15%	12%	0%
Italy	10%	63%	21%	12%	21%	3%
Netherlands	14%	57%	26%	18%	13%	2%
Norway	14%	49%	21%	22%	21%	3%
Poland	13%	62%	24%	16%	15%	5%
Spain	7%	67%	24%	15%	16%	1%
Sweden	14%	49%	22%	22%	16%	1%
Switzerland	17%	54%	22%	15%	16%	3%
Brazil	14%	66%	28%	15%	12%	2%
Canada	18%	55%	21%	18%	13%	2%
USA	13%	70%	37%	12%	11%	3%
Australia	16%	58%	19%	17%	12%	4%
New Zealand	19%	57%	19%	20%	9%	2%
China	14%	74%	28%	11%	14%	5%
Hong Kong	13%	57%	20%	19%	21%	2%
India	11%	69%	41%	20%	17%	4%
Japan	23%	49%	17%	15%	18%	5%
SEA	12%	58%	27%	28%	20%	6%
South Korea	19%	37%	15%	17%	25%	8%
Israel	13%	46%	13%	22%	21%	7%
Saudi Arabia	16%	64%	46%	17%	14%	1%
UAE	15%	63%	41%	20%	15%	1%

F2: And on this particular break or holiday which of the following best describes who you were travelling with?
Base is Britain visitors; N=8,497; Global weighting applied; Significance testing is removed to make the chart readable

As expected, the longest stays in Britain come from the long-haul markets, although travellers to other destinations beyond Britain do stay and additional night on average



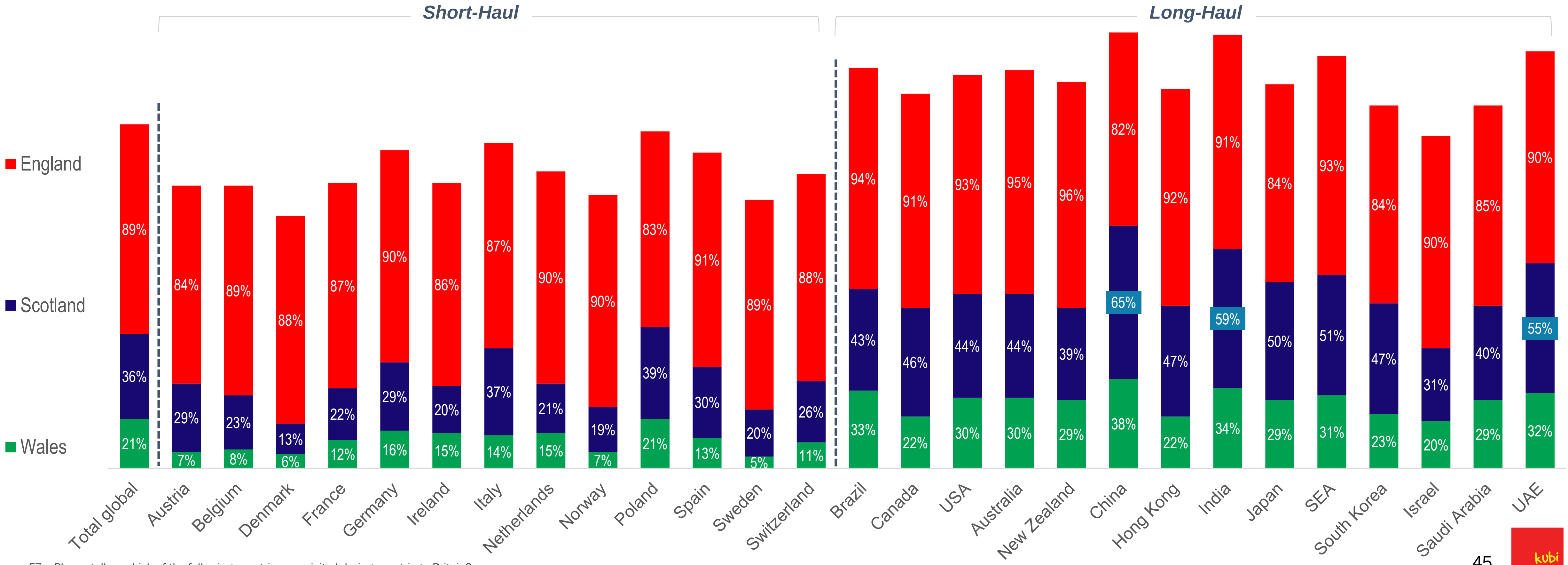
Long Haul Markets	10.6
Short Haul Markets	7.4
Britain average ----	9.1
Elsewhere average - - -	10.2

F4. And how many nights did you stay away?
Bases Britain n=8,497; Elsewhere n=9,662

Long-haul tourists visit multiple countries within Britain in the same trip. England is the most popular country across markets, but Scotland sees very high visitation from China, India and UAE where multi-country visits in Britain are more common

Countries Visited in Britain

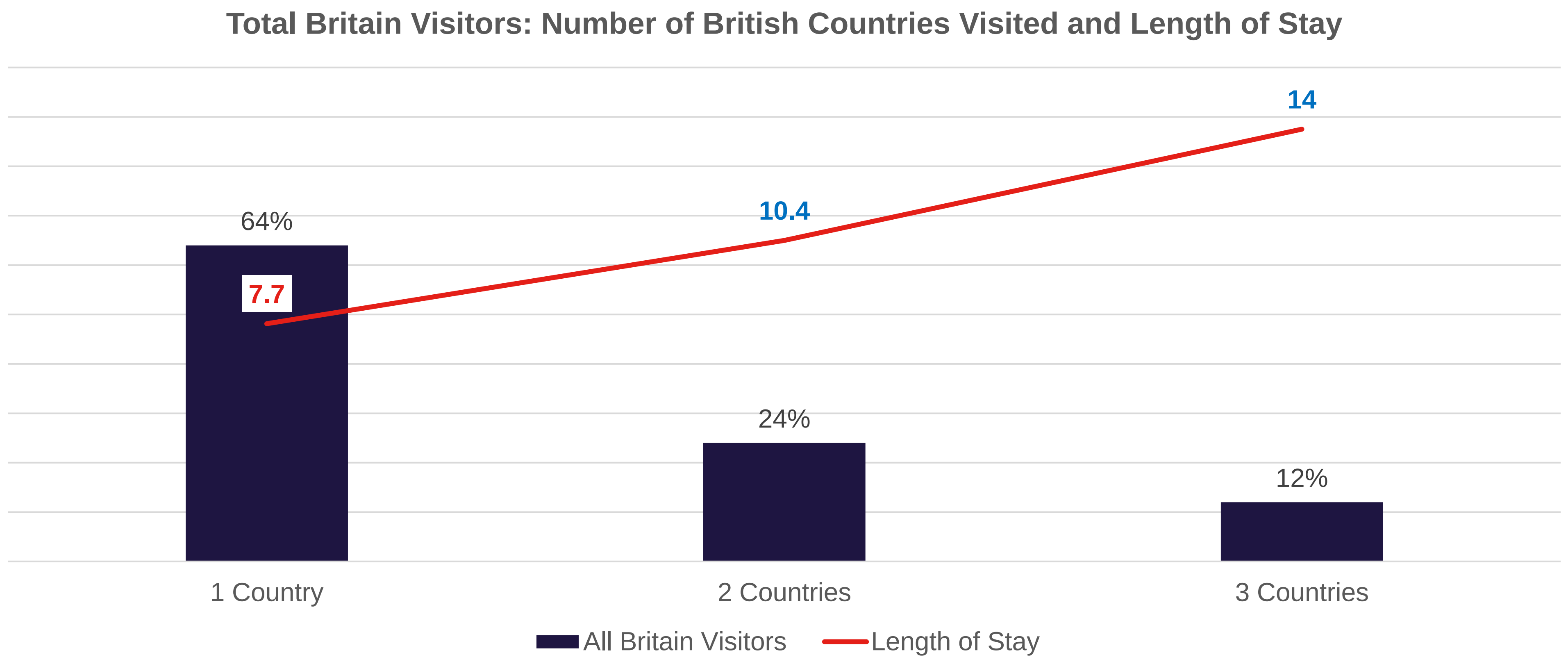
Visited a single country in GB	64%	82%	82%	92%	80%	71%	76%	68%	79%	86%	66%	72%	87%	74%	49%	53%	50%	52%	53%	43%	53%	34%	50%	47%	58%	68%	59%	43%
Visited multiple countries in GB	36%	17%	18%	7%	19%	28%	22%	31%	21%	13%	33%	28%	12%	24%	51%	46%	50%	48%	46%	57%	46%	65%	48%	53%	41%	30%	41%	57%



F7a: Please tell us which of the following countries you visited during your trip to Britain?
Base is Britain visitors; n=8,497 Blue highlights show extremely high and worthy of calling out separately

Adding within-Britain travel to one's trip can almost double the length of stay, delivering a strong accretive revenue opportunity

This pattern reinforces the size of the opportunity in converting visitors to explore beyond England.



F7a: Please tell us which of the following countries you visited during your trip to Britain?
Base Britain visitors n=8,497 Buzzseeker visitors to Britain n=2,706
Blue highlights are significantly higher; red significantly lower

London is clearly the most popular destination in England. Visitors from Indian (South Asia) visited more places across England with fewer travelling to London

Places visited in England

	Total global visitors	Oceania	North Europe	Central Europe	West Europe	South Europe	North America	South America	North East Asia	South Asia	South East Asia	Middle East
North East	16%	16%	5%	9%	6%	7%	22%	22%	26%	31%	23%	25%
North West	29%	32%	13%	17%	20%	19%	36%	46%	41%	48%	47%	38%
Yorks & Humber	12%	24%	4%	8%	7%	8%	13%	19%	15%	21%	14%	16%
East Midlands	14%	18%	4%	8%	6%	6%	19%	17%	23%	31%	29%	25%
West Midlands	16%	22%	6%	8%	11%	11%	20%	16%	25%	37%	27%	22%
East of England	27%	27%	14%	14%	11%	20%	30%	32%	51%	47%	41%	43%
London	78% ↑	79%	79%	82%	73%	90%	75%	92%	81%	66%	81%	74%
South East	27%	37%	12%	22%	17%	24%	31%	29%	40%	48%	32%	30%
South West	18%	32%	7%	16%	12%	12%	22%	18%	23%	27%	24%	19%

F7a: Please tell us which of the following countries you visited during your trip to Britain?
Base GB visitors; n=8,497
Red numbers significantly lower than total @95%; blue numbers significantly higher; blue arrows used to highlight disproportionate total skew

kubi kalloo

Britain visits are significantly skewed towards seeing ‘must do’ sites and places, but NOT a relaxing break relative to other destinations

*This is likely to be driven by the strong London-centric focus of trip-takers, especially for first-time visitors, but **we need to keep in mind that Restful Breaks/Holidays are the number one type sought (19% of total international holidays/breaks)***

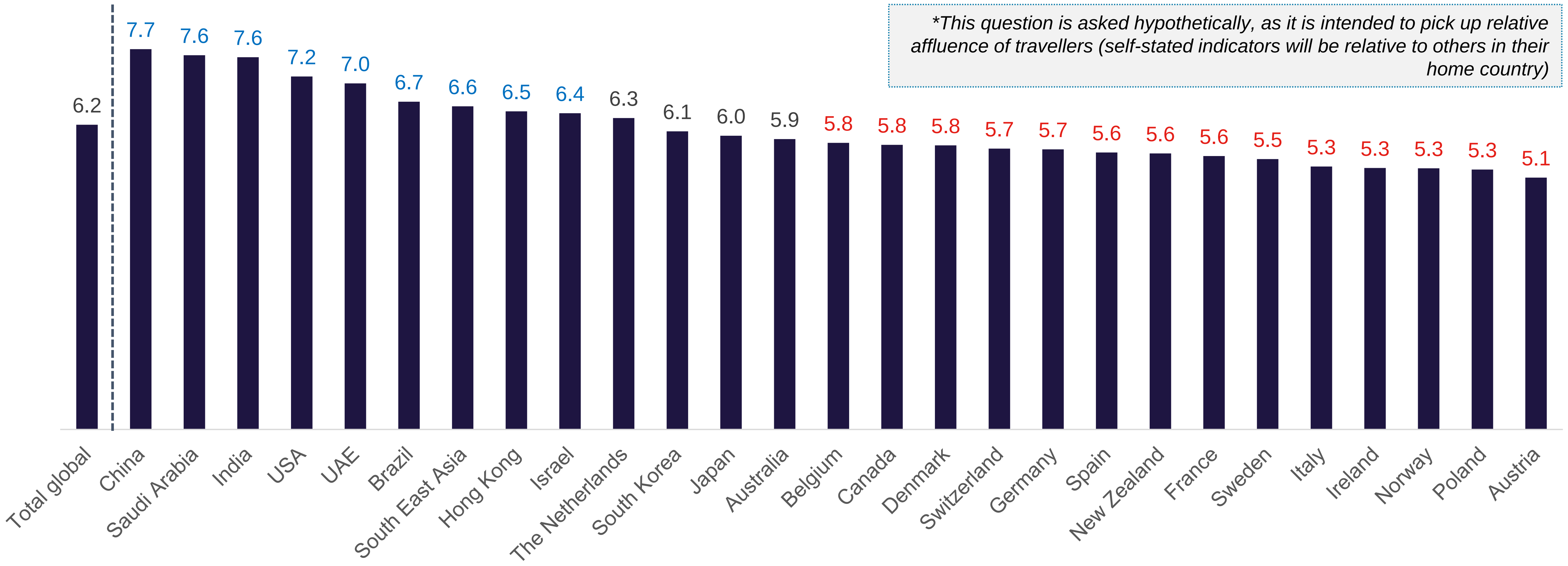
F5. And which of these would you say was the main purpose of this trip?
Base: Britain visitors n=8,497; Visitors Elsewhere n=9,662; Global weighting applies

Higher *potential** spenders are more likely to come from Asia, the Middle East and USA. European travellers likely to be the lowest spenders (independent of their length of stay)

What type of tourist might you be if visiting Britain in the future

Average scores on 10-point scale (10 = Super premium, 1 = Budget)

**This question is asked hypothetically, as it is intended to pick up relative affluence of travellers (self-stated indicators will be relative to others in their home country)*



J4. Using the scale below, please indicate what kind of tourist you might be if visiting Britain in the future?
Base is total (asked of all as hypothetical question): N=22,840; weight applied to total global score

AGENDA

Sustainability is an emerging driver of importance in destination selection for international tourists and is most relevant to younger travellers.

As a topic, it is currently perceived quite generally, however, we anticipate this might evolve with time as its role in destination choice becomes more prominent.

It is interesting that, despite this scepticism, 9 in 10 travellers claim to have engaged in sustainable tourism behaviours, illustrating **strong emotional engagement and positive endorsement.**

Future intentions mirror past behaviour, suggesting we focus on **reinforcing current behaviours around themes of localisation, nature, dispersion (geographic and seasonal) and preservation.**

We see evidence of a stronger imprint in terms of perceptions of sustainability in Australia where these themes are being utilised.

Key barriers are consistent across markets and segments, all pointing to a need for **greater clarity, signalling and impact reinforcement** to overcome behavioural apathy.

Chapter Overview

An emerging driver of destination and product choice, particularly for younger travellers but requiring clarity, signalling and impact reinforcement

Currently, the term ‘sustainable/responsible’ tourism is interpreted very broadly

What does sustainable/responsible tourism mean to you?

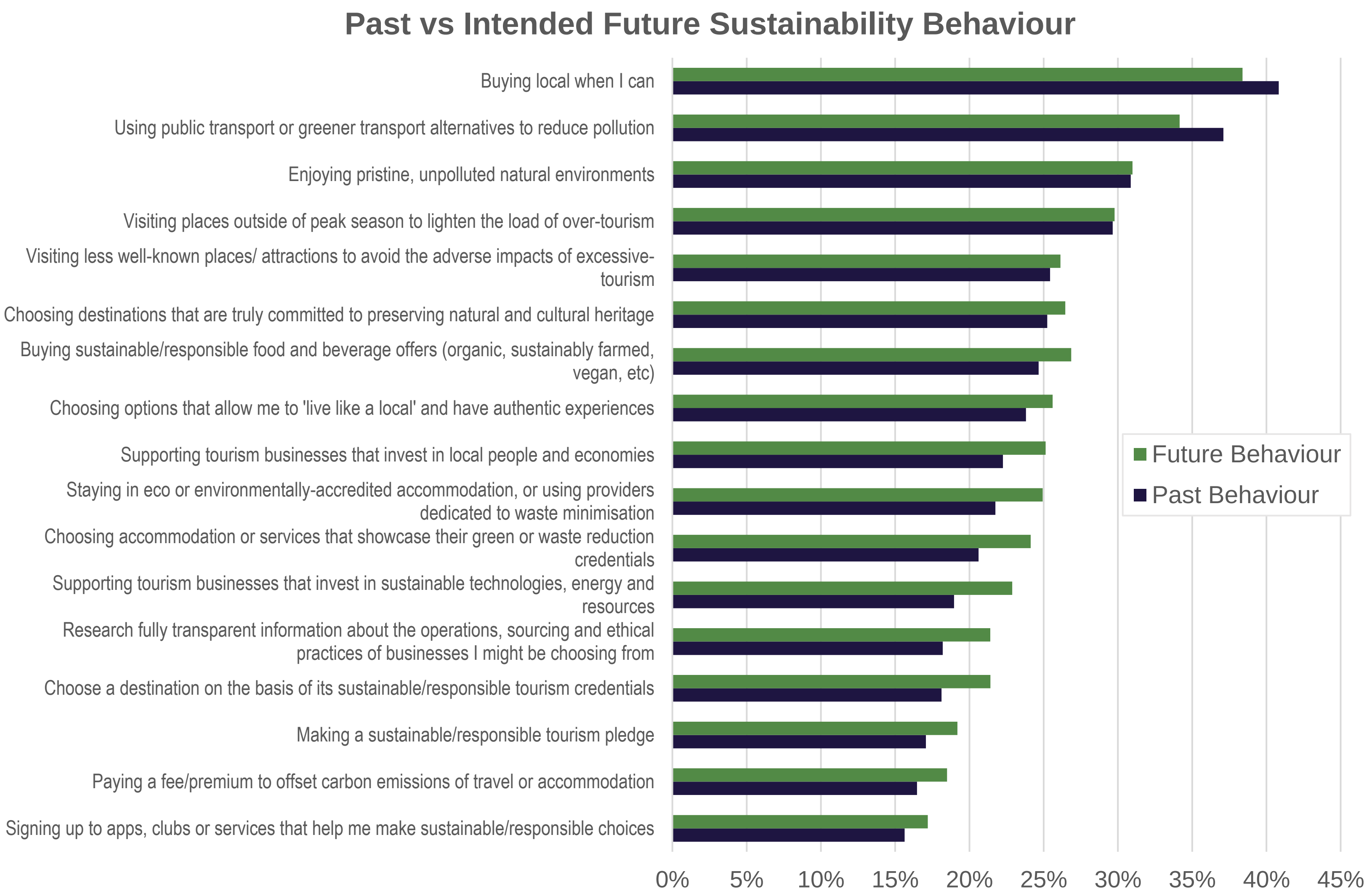
Top Ranked statements of those indicating they knew what it meant (93%)

H1: As a traveller what does sustainable/responsible tourism mean to you? Please rank the top 3 statements below that best reflect what sustainable/responsible tourism mean to you.
Base N=22,840 Global Total; Buzzseekers n=6,677; global weighting applied

Past behaviour mirrors intended future behaviour almost identically

Whilst there is a marginal difference between past and future intended behaviours (maximum of 4%) when it comes to tourists visiting Britain, **95% of these behaviours are represented by the same people.**

In other words, whilst there is an appetite for more sustainable behaviour in the future, the **immediate opportunity lies in reinforcing and enriching their commitment,** particularly given 92% of all tourists are already engaging in at least one of these behaviours.



H2a: And when it comes to taking leisure breaks or holidays abroad, which of the following things have you done in the past?
H2b. And which do you plan to do on future breaks or holidays?

But there are barriers that we need to address, particularly perceived cost which is consistent across markets

Top Ranked Barrier to Engaging in Sustainable Tourism Behaviour

***Perceived cost is the strongest barrier**, but this is usually a post-rationalised answer.*

*Reading beyond this, therefore, we see that **lack of clarity** around what sustainable tourism means, **its impact and how to navigate these behaviours** are more likely the true reasons for not changing behaviour.*

H3. Which of the following do you believe *prevent* you from travelling more sustainably/responsibly?
Select the top 3 statements that you feel prevent you from travelling more sustainably/responsibly when taking a leisure break or holiday abroad.

AGENDA

The role of word of mouth and buzz from friends and family fuels and inspires tourist behaviour, regardless of destination. Digital content from travel sites, **social media and National Tourism Boards** also stimulate and spark inspiration, along with the lure of securing **bargain deals**.

Compared to other destinations, **travel inspiration for Britain** is ignited more by **sporting events** and **international movies or TV** programmes.

In the deciding phase, **priced resources** (comparison sites, airline or tour deals) become increasingly influential.

Tourists travelling long haul are more likely to **book elements of their trip to Britain together as a package.** Similarly, we see different market disposition towards to package bookings.

Use of intermediaries such as **Travel Agents and Tour Operators remains high**, including offline interactions, with half of global tourists using their services for package booking. Their role is particularly strong in the deciding and booking phase, helping provide trust, best price and reassurance.

Airline partners are similarly more important in this phase, particularly in booking the travel-related elements and especially for long-haul markets.

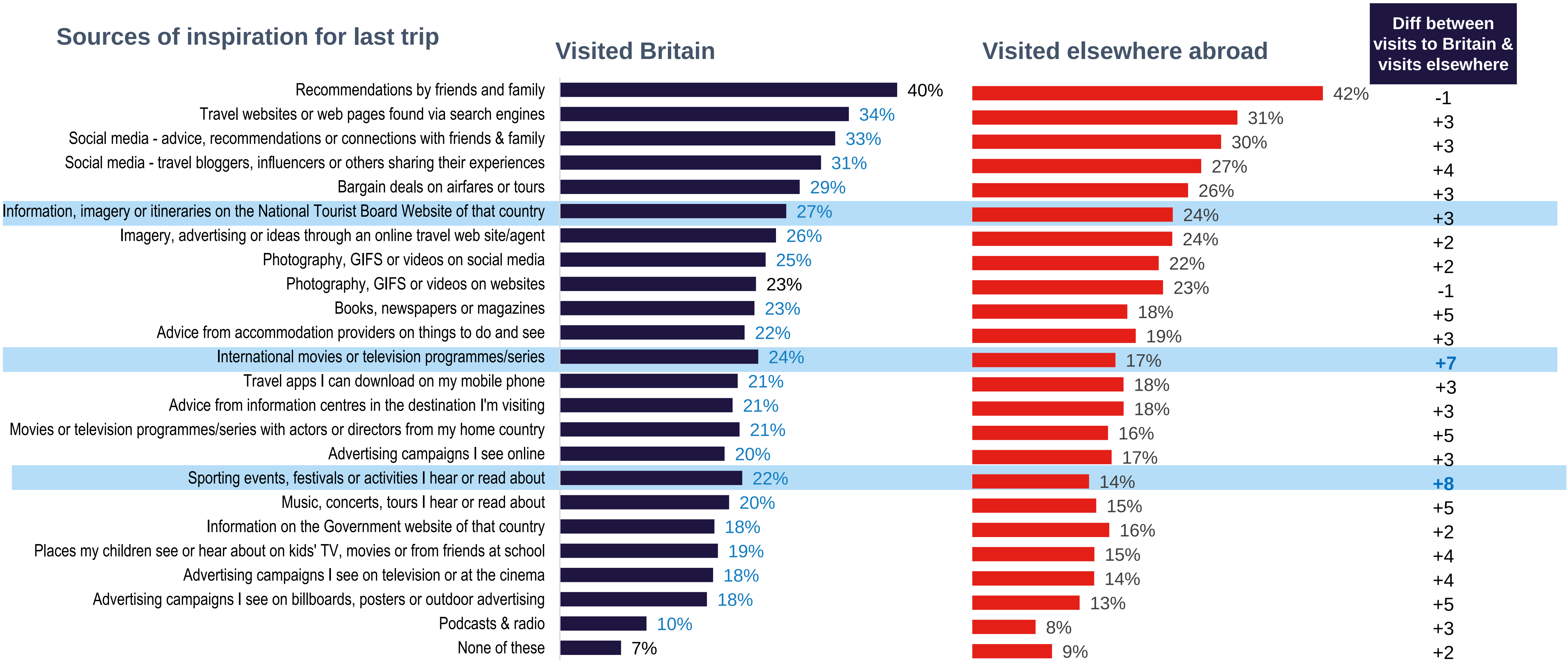
Chapter Overview

A combination of resources and partnerships are used by tourists to inspire, decide and book their trips, including once they are on-the-ground in Britain

Let’s break the journey down into 3 stages….

Inspiration, Deciding, Planning & Booking

Recommendations by friends and family are the most dominant inspiration for travel. Sporting events and international movies / TV programmes provide more inspiration for Britain visits than elsewhere



I1. Please select the main places/tools/sources which inspired you to consider the break or holiday in [DESTINATION].Select all that apply.
Base; Total Global N=22,840; Visited Britain; N=8,497; Visited Elsewhere Abroad N=9,662; global weighting applied to all
Blue indicates that Visited Britain is statistically higher than Visited Elsewhere @ 95% confidence
Note: rounding error may occur as percentage decimal places have been truncated

kubi kalloo

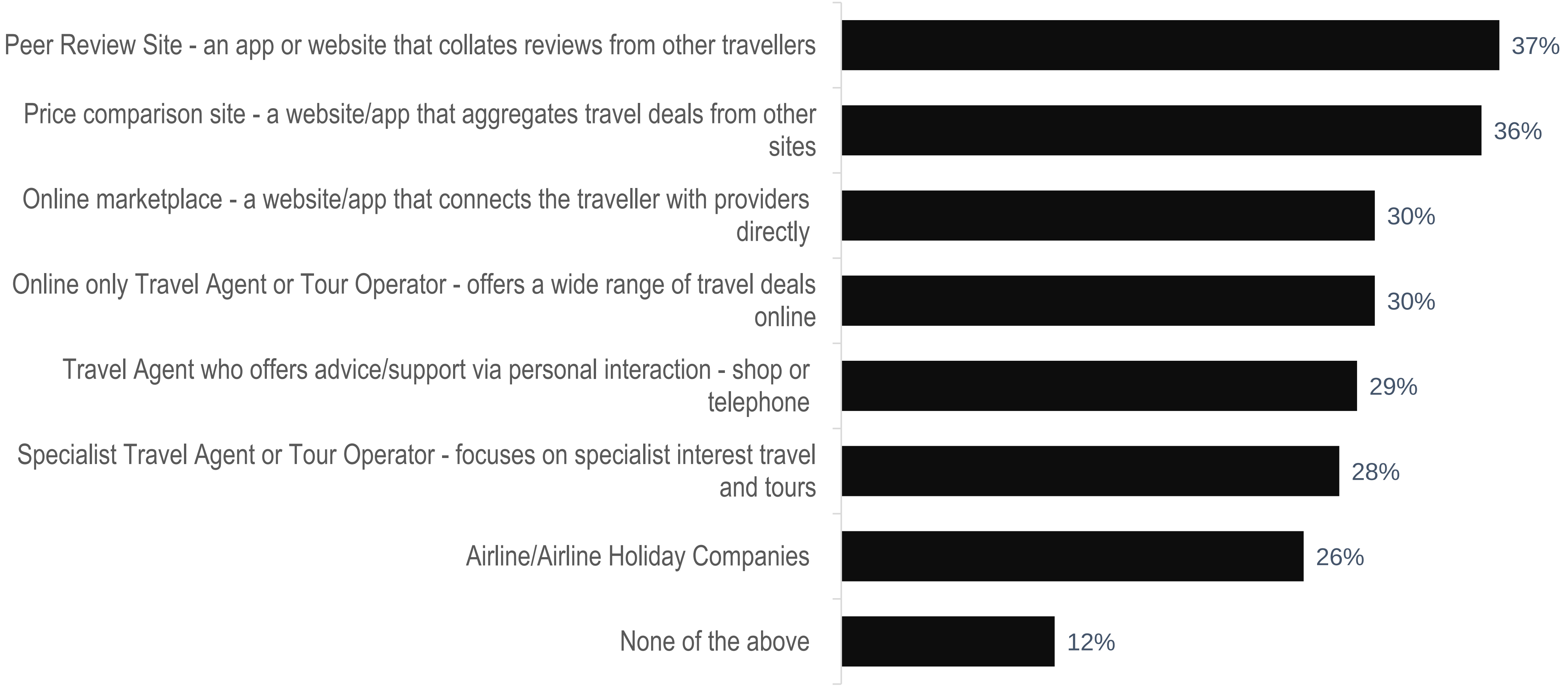
Inspiration to visit Britain also varies by region - triggered more by deals for European visitors, while social media inspires in Asia and the Middle East, and bargain airfare or tour deals spur Northern European visitors to consider

		RANK ORDER WITHIN REGION										
GLOBAL RANK	TOP SOURCES OF INSPIRATION TO VISIT BRITAIN	OCEANIA	NORTHERN EUROPE	CENTRAL EUROPE	WESTERN EUROPE	SOUTHERN EUROPE	NORTH AMERICA	SOUTH AMERICA	NORTH-EAST ASIA	SOUTH ASIA	SOUTH-EAST ASIA	MIDDLE EAST
1	Recommendations by friends and family	1	2	1	1	1	2	5	6	6	4	3
2	Travel websites or web pages found via search engines	2	4	2	3	2	1	2	3	4	2	4
3	Social media - friends & family	3	3	5	4		3	3	2	2	3	1
4	Social media – travel bloggers, influencers experiences	5	5		5	6	5	1	1	1	1	2
5	Bargain deals on airfares or tours	4	1	3	2	3						
6	Information, imagery or itineraries on NTB website			6	5	4	4			3	5	5
Not in global top 6, but in region Top 6	Imagery, advertising, ideas on online travel web site/agent					*5*	*6*	*6*	*4*			
	Photography, GIFS or videos on social media								*5*			
	International movies or television programmes/series							*4*				
	Books, newspapers or magazines			*4*								
	Accommodation providers advice on things to do and see											
	Travel apps I can download on my mobile phone										*6*	*6*
	Advice from information centres in Britain	*6*										
	Music, concerts, tours I hear or read about		*6*									
	Information on the Government website									*5*		

I1. Please select the main places/tools/sources which inspired you to consider the break or holiday in Britain. Select all that apply.
Base N=8,497 Visited Britain. Base sizes by continent or region (refer sample pages); global weighting applied

Intermediaries and digital sites play a strong role in the Inspiration phase of the journey – aggregator (price and review) sites have the greatest influence, with 60% of global tourists using more than one of these sources

The Inspiration Phase (Global):



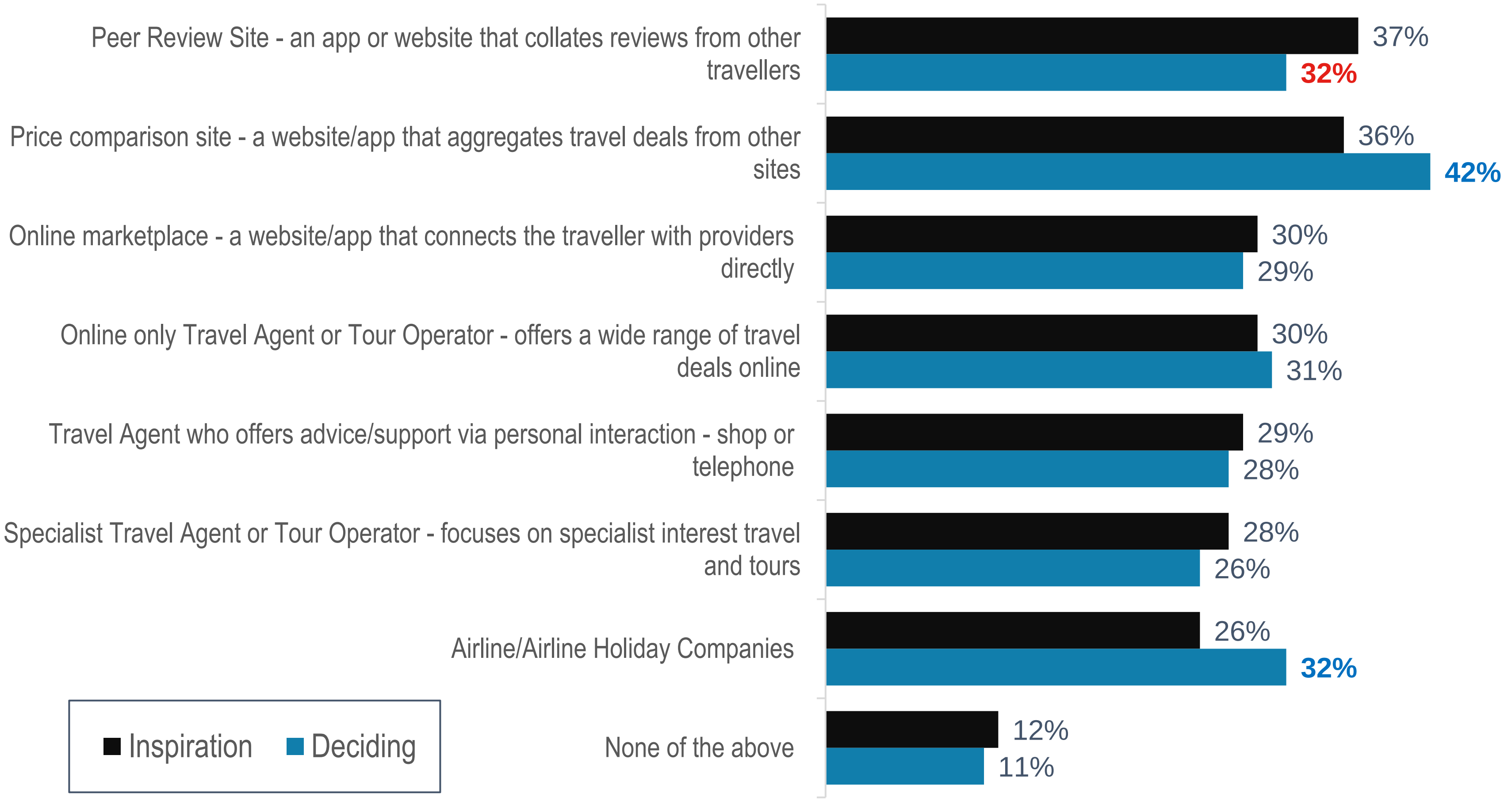
I2: Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages? Multiple Response
Base: Total Global N=22,840 Buzzseekers N=6, 677 Weighted.
Blue numbers are significantly higher than comparative base @ 95% confidence

Let’s break the journey down into 3 stages….

Inspiration, Deciding, Planning & Booking

When it comes to the deciding phase, at a global level, we see the role of price comparison sites and airlines significantly increase, whilst the relevance of peer review sites diminishes somewhat

Comparing Use From Inspiration to Deciding Phases of the Customer Journey



Blue numbers in the table reflect a significant increase vs the previous Inspiration phase; red a decrease

The role of each intermediary drops back down again in the planning phases (see full report), but booking behaviours become more interesting

I2: Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages? Multiple Response
Base: Total Global N=22,840 Buzzseekers N=6, 677 Weighted.
Blue numbers are significantly higher than comparative base @ 95% confidence

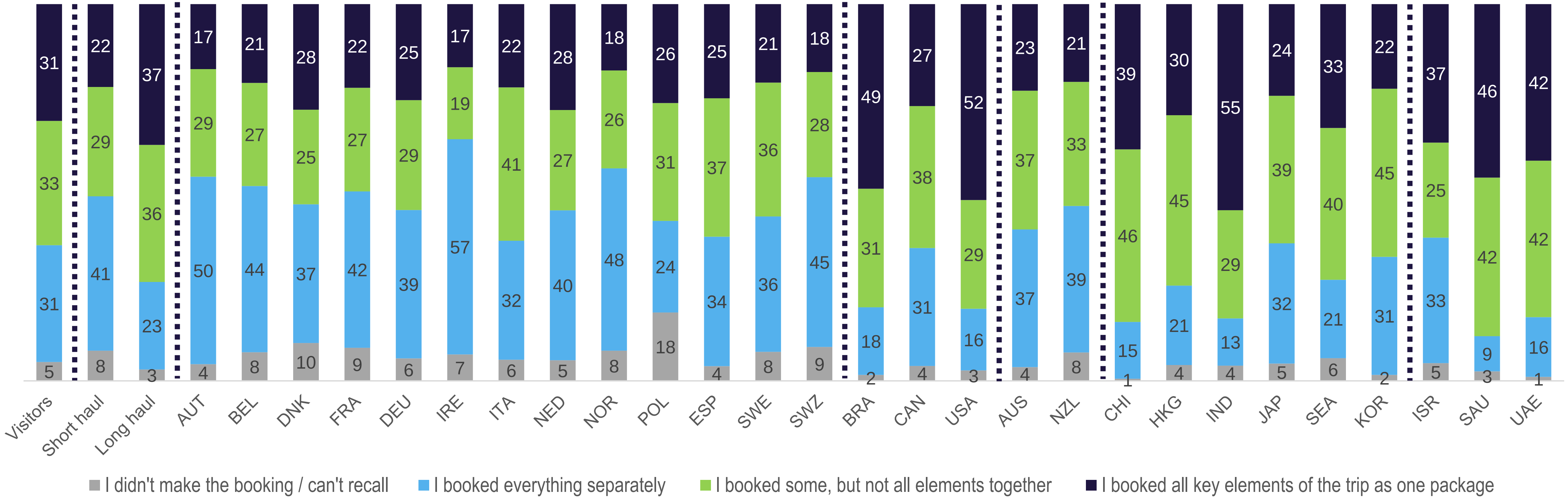
Let’s break the journey down into 3 stages….
Inspiration, Deciding, Planning & Booking

Around one-in-three booked as a package to Britain, with short-haul markets tending to book elements more independently

Tourists from the Americas and India are disproportionately to book as a package, with the Middle East also mirroring this tendency.

Booked elements	One package	Some together	All separately
Visited Britain	31%	33%	31%
Visited elsewhere	32%	30%	30%

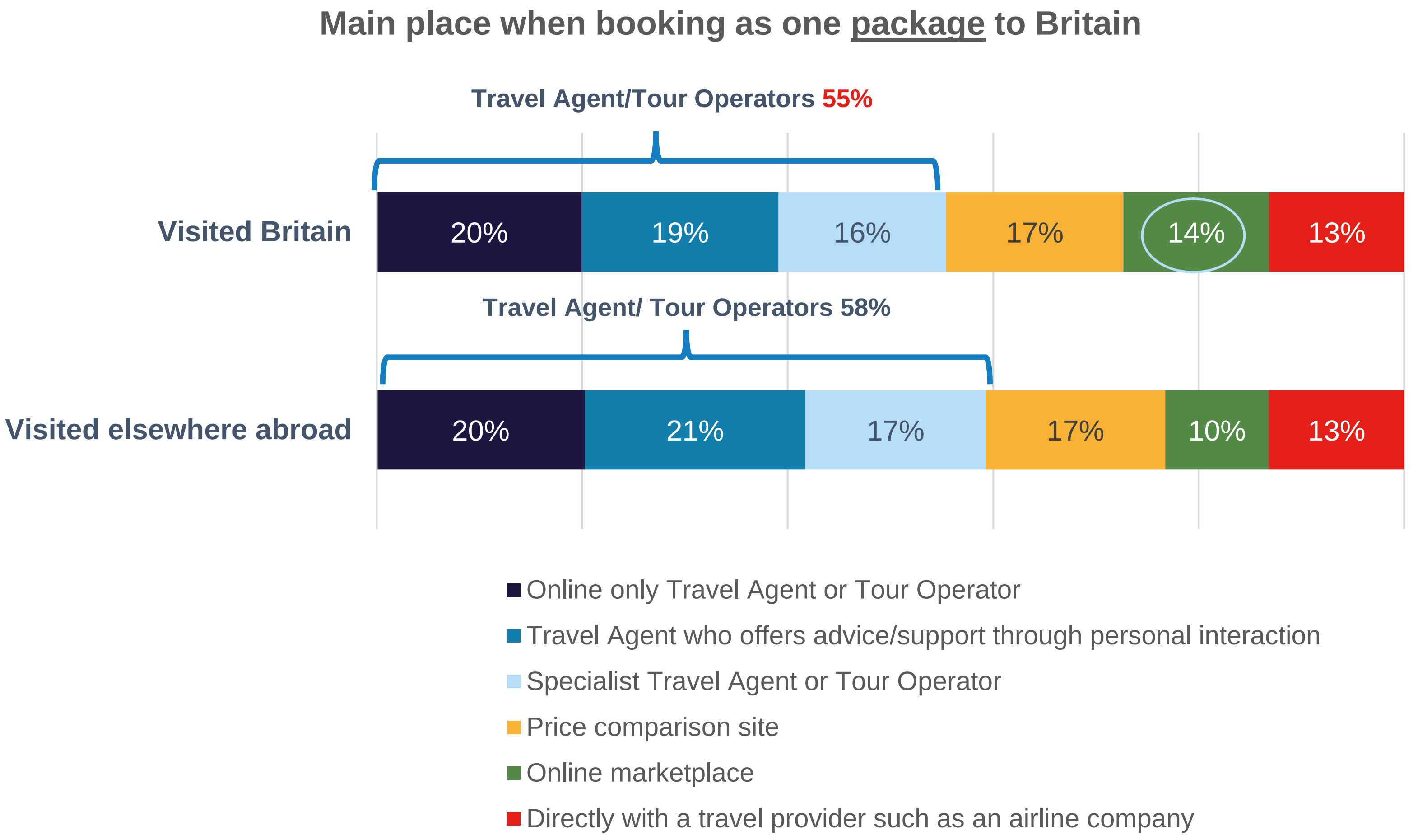
Booked key elements of leisure break / holiday to Britain – by market



I3: And thinking about this break or holiday to Britain, which of the following is true when it came to booking the elements of your trip.
Base; Visited Britain; N=8,497; Visited Elsewhere Abroad N=9,662; global weighting applied. Countries unweighted
Circled numbers are statistically higher @ 95% confidence

Packages are mostly booked through travel agents/tour operators, with online marketplaces low but more common for Britain packages than other destinations and especially so for visitors from India

It is important to note the importance that offline Travel Agents continue to have within the booking phase.

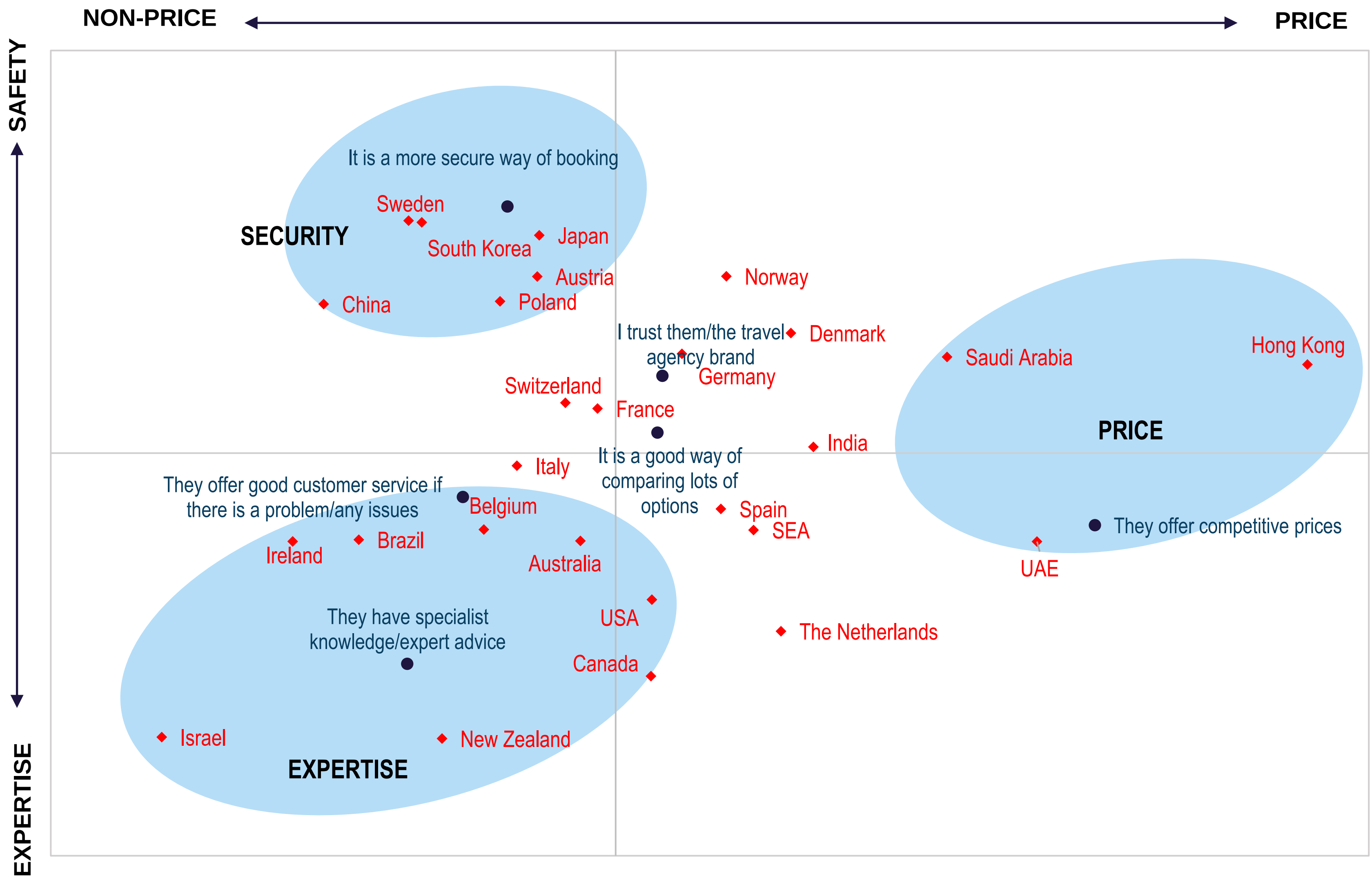


For the main markets that book as a package to Britain:

- **Saudi Arabia** less likely to personally interact with a travel agent (13%) and more likely to deal directly with an airline (17%) when booking a trip to Britain
- **India** visitors used online marketplaces (21%) more than any other place
- **Brazilians** relied heavily on travel agents (68%) and especially specialist operators (22%)
- **UAE** visitors turned to online travel agents (25%) and price comparison sites (23%)
- **China** employed specialist travel agents (21%)
- No unique differences for **USA**

I4: And which of these best captures how you booked your [package] trip?
Base Weighted Global Package bookings N=.7,082; Visited Britain N=2,594, Visited elsewhere abroad N=3,083

Markets have different perceptions when it comes to the benefits of using travel agents



- The two most commonly perceived benefits of using a travel agent, **delivering expert advice and customer service** if problems arise, are strongly held for travellers from **the Americas, Oceania, Israel, Belgium and Ireland**
- Travelers from **North-East Asia, Poland, Austria and Sweden** had stronger beliefs that travel agents offered a **more secure** means of booking
- Those from **UAE, Hong Kong and Saudi** viewed travel agents strongly on **offering competitive prices**
- In **India** where travel agents are particularly popular, they are seen to deliver multiple benefits.

I7: What do you see as the main benefits of booking through a travel agent?
Base; Total Global N=22,840. Base sizes by country (refer sample pages) no weighting applied

Europe has a lower tendency to use travel agents / tour operators to make travel and accommodation bookings

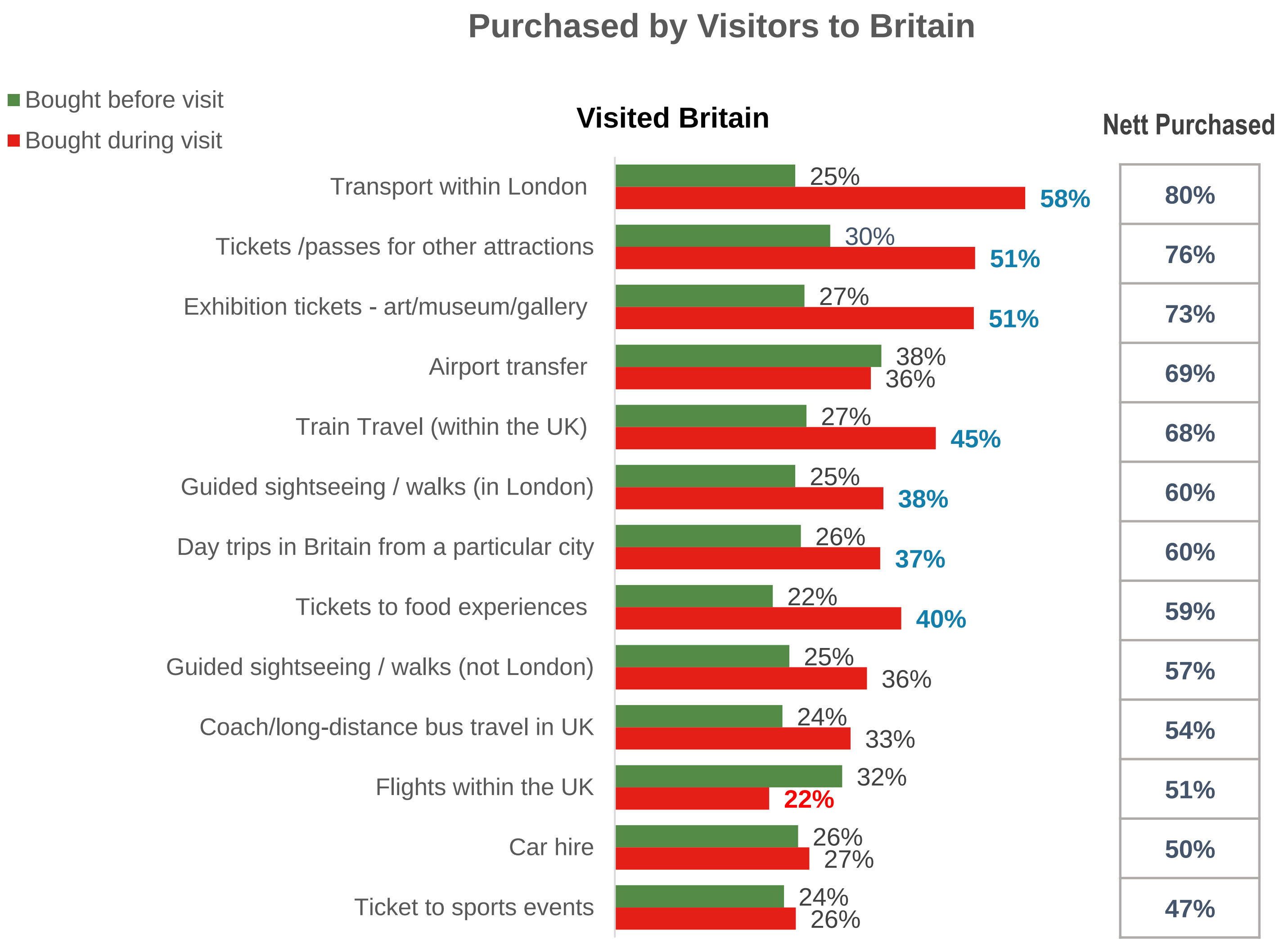
Difference in usage of intermediaries by region versus global average (statistically significant differences shown)

		SE Asia	South Asia	NE Asia	Middle East	South America	Oceania	North America	Central Europe	West'n Europe	Sth'n Europe	Nth'n Europe
PACKAGE BOOKINGS	NET: Travel agent / tour operator			+5	-4	+12	+4	-4		-6		+4
	Price comparison site					-4				-6		-5
	Directly with travel provider e.g. airline			-4		-6	+5		-4			
	Online marketplace		+7				-5					
	Online only Travel Agent/Tour Operator						-6			-5		+7
	Travel Agent - shop or phone				-4	+7	+11		+5			
	Specialist Travel Agent/Tour Operator			+7					-6			
TRAVEL BOOKINGS	NET: Travel agent / tour operator	+5	+19	+13	+4	+14	+7			-10	-4	-8
	Price comparison site	+6	-6				-6				+5	
	Directly with travel provider e.g. airline	-6	-13	-6	-5	-11	+6	+5		+5	-7	+8
	Online marketplace		+4	-4			-4				+7	
	Online only Travel Agent/Tour Operator	+8	+9	+6						-5		
	Travel Agent - shop or phone		+7	6		+7	+11			-4		-4
	Specialist Travel Agent/Tour Operator		+4	+5		+7			-4			
ACCOMM BOOKINGS	NET: Travel agent / tour operator	+4	+21	+15		+12				-6		-11
	Price comparison site	+6	-6		+5		-4				+4	
	Directly with accommodation e.g. hotel	-5	-12	-7		-7		+5			-6	+6
	Online marketplace			-5							+5	
	Online only Travel Agent/Tour Operator	+7	+7	+8						-5		-4
	Travel Agent - shop or phone	-4	+8			+8	+6					-4
	Specialist Travel Agent/Tour Operator		+6	+5								

- Travel agents popular for tourists from **South and North East Asia** when booking travel and accommodation and across all three forms of bookings for **South Americans**
- While much of Europe has a lower tendency to use travel agents, **Central Europeans** do use traditional travel agents especially if booking a package
- Airlines and traditional travel agents are more prominent for those from **Oceania**
- Online only travel agents are used more across **Asia** for travel and accommodation, as opposed to booking directly with providers

I4: And which of these best captures how you booked your [package] trip? I5 And which of these best captures how you booked your travel to and from [DESTINATION]? I6. And which of these best captures how you booked your accommodation in [DESTINATION]? If you made multiple bookings, please select the MAIN one that applies.
Numbers are statistically higher than the average @ 95% confidence

For Visitors, London transport, tickets to attractions (including exhibitions) and trains are all frequently bought once tourists are in Britain



- Flights and airport transfers were most often pre-purchased prior to the trip
- **European** visitors were generally less likely to purchase across all categories, although visitors from:
  - Poland had a greater tendency to buy tickets to food experiences (69%)
  - Spain were more likely to buy London transport cards (87%) and airport transfers (78%)
  - Sweden generally bought flights for within the UK (84%)
- **Oceania** visitors were more likely to purchase train travel for within the UK (74%) and hire a car (53%)
- Visitors from **Asia, Brazil and North America** had a higher tendency to purchase across all activities / forms of transport

I8: Did you buy the following when you visited Britain?
Base Total Visitors to Britain N=8,497. For countries no weighting applied
Blue numbers signify that bought during the visit is statistically higher than bought before visit @ 95% confidence; red numbers are significantly lower

AGENDA

Demand is back for global tourism and Britain remains a priority destination, even for those who have recently visited.

Value for money has become the dominant driver and remains a *perceptual* weakness for Britain. We expect value to continue to increase in importance and tourists are looking for ways to mitigate financial risk in a post-pandemic environment.

Britain's strength as a destination choice lies in its (iconic) **diversity of history and modernity in one, easy to navigate place**. A brand framework is derived from the study, including identification of important regional flexes.

Visitors to Britain discover it to be **easier, more affordable and more welcoming** than perhaps expected – how can we leverage their experience more knowing the importance of WOM in the early phases of the tourism journey?

Emerging themes of **wellbeing, sustainability and inclusivity** are becoming a stronger priority, but **each needs more work** in terms of truly understanding what they *could* and *should* mean for British tourism. Adding to the current brand footprint, these elements will add warmth, surprise and uniqueness to our brand offer.

Within a wide array of inter-personal and digital sources, **partners remain a key source of inspiration, information and trust** throughout the stages of the tourism journey and package bookings remain particularly strong for some of our largest inbound markets.

In Summary

A great opportunity to reignite brand Britain across the tourism journey in ways that are sufficiently unexpected and smart in order to capture the hearts, minds and wallet of the global tourism market

Note: some points are covered in the full report which contains more analysis than we were able to share in this debrief!