# USA EXPERIENCE SEEKERS

VISIT BRITAIN

VisitEngland

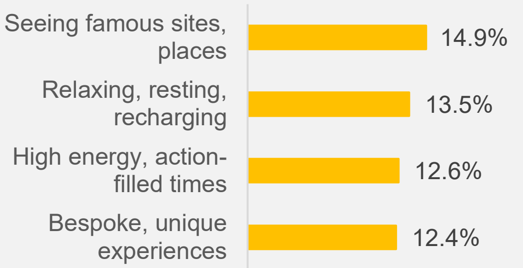
# USA EXPERIENCE SEEKERS (41%)

**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..

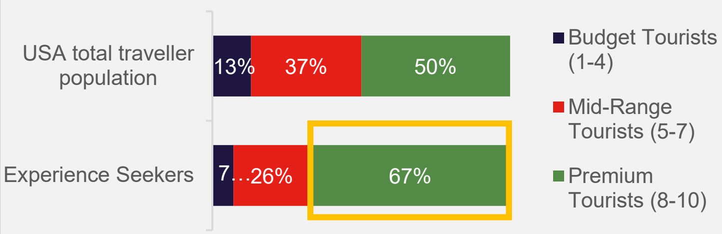
## Propensity to travel (vs USA total traveller population)

| | |
|---|---|
| Britain | 8.1 (vs 7.5) |
| Anywhere internationally | 7.6 (vs 6.8) |

## Top Holiday Types Preferred (share of preference)




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**.

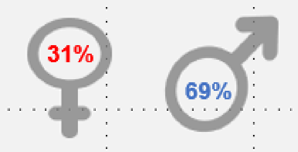



**PRIORITY Experience Seekers** are trend endorsers (vs total):

Wellbeing involved **33% (+10%)**

Sustainability engaged **50% (+20%)**

Inclusion seekers **45% (+11%)**




## SOURCES OF INSPIRATION FOR EXPERIENCE SEEKERS:

| | |
|---|---|
| Travel websites or web pages **41%** | Recommendations by friends & family on social media **40%** |
| Travel bloggers, influencers **39%** | Recommendations or connections with friends & family **35%** |

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

**More than 2/3 travel** with their partner/ spouse; almost **half of them** travel with kids (multiple response data)

## TOP DRIVERS OF DESTINATION CHOICE*:

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

## KEY PERCEPTIONS OF BRITAIN:

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

## TOP ACTIVITIY PREFERENCES:

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

## TOP DESTINATIONS LIKELY TO VISIT (Excl. Britain)

Likely to consider…

| France | Italy | Australia | Germany | Spain |
|---|---|---|---|---|
| (68%) | (67%) | (62%) | (61%) | (61%) |

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

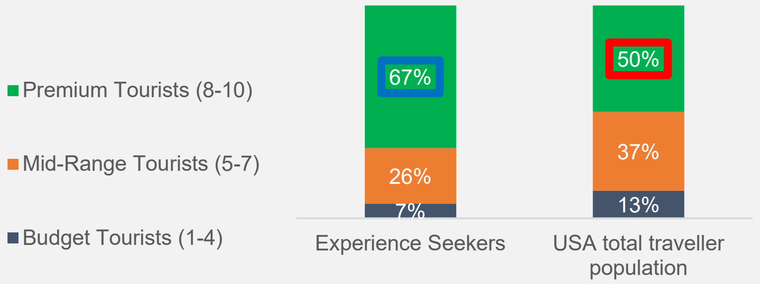
* Tox 2 Box

VISIT BRITAIN

# USA EXPERIENCE SEEKERS (41%)

## SPEND POTENTIAL AS VISITOR TO BRITAIN:

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




## 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

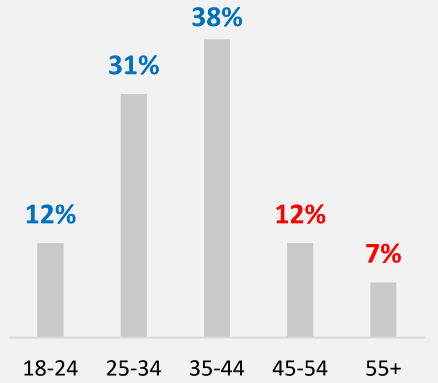
8% Black

7% Latinx

3% Asian

## AGE

***Modal age: 35yrs**
**Median age: 35yrs**




**Age with the highest frequency*

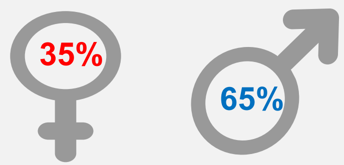
## VISITORS (vs USA total)

Britain Visitors (P5yrs) **54% (+8%)**

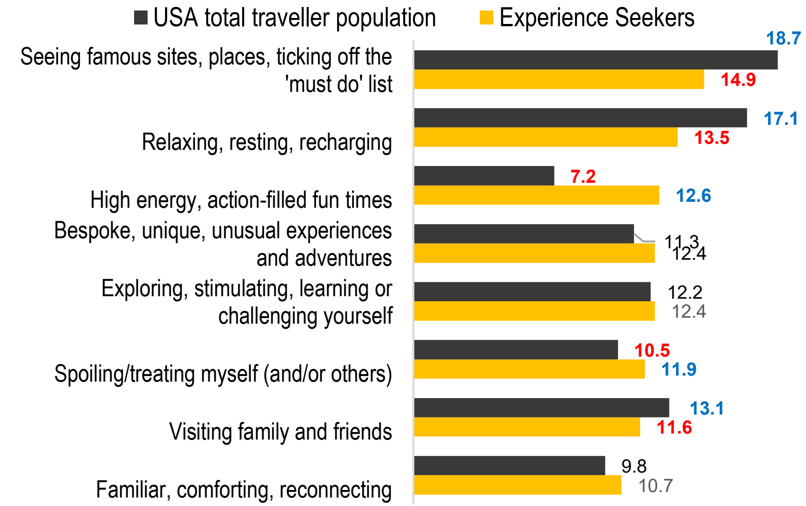
Considerers (P5yrs) **46% (-8%)**

Identified as LGBTQ+ **17% (+2%)**

## GENDER




## TYPES OF HOLIDAYS:




## SOURCES OF INSPIRATION (BIGGEST SKEWS):

| Recommendations or connections with friends & family | Travel bloggers, influencers | Music, concerts, tours | Kids' TV, movies or from friends at school |
|---|---|---|---|
| 10% | 10% | 7% | 7% |

## 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 | FRANCE | GREECE | AUSTRALIA | SPAIN |
|---|---|---|---|---|
| (+14%) | (+14%) | (+14%) | (+14%) | (+10%) |

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

VISIT BRITAIN

# USA: EXPERIENCE SEEKERS PLANNING BEHAVIOUR

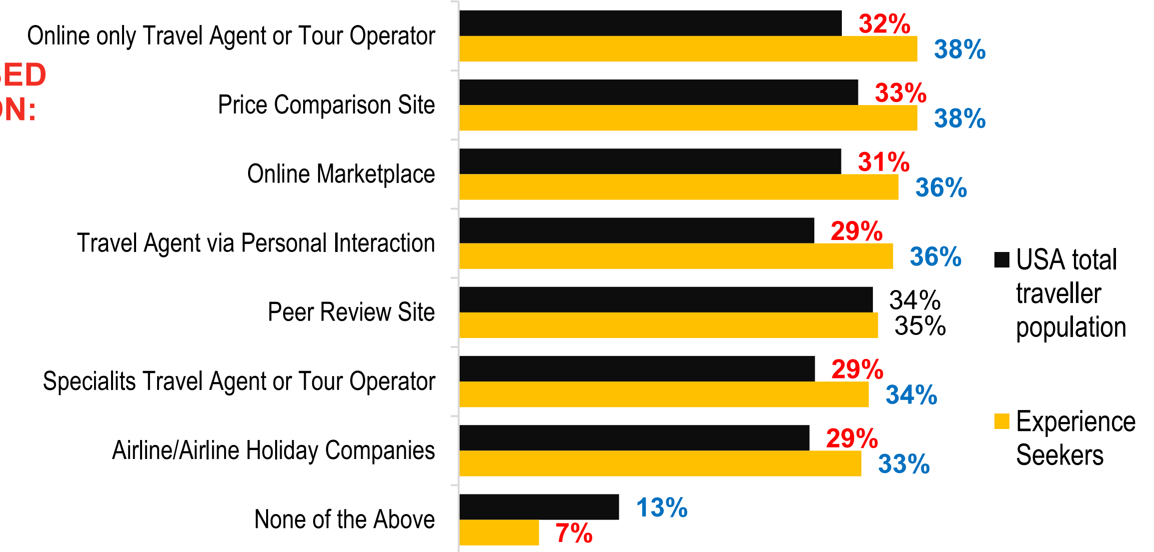
Experience Seekers show a higher usage of online marketplaces in their planning & booking phase, alongside greater use of Online Travel Agents and Specialist Operators.

The majority are using multiple resources in the booking phase, with 40% using 3 or more sources in this final phase of the journey.

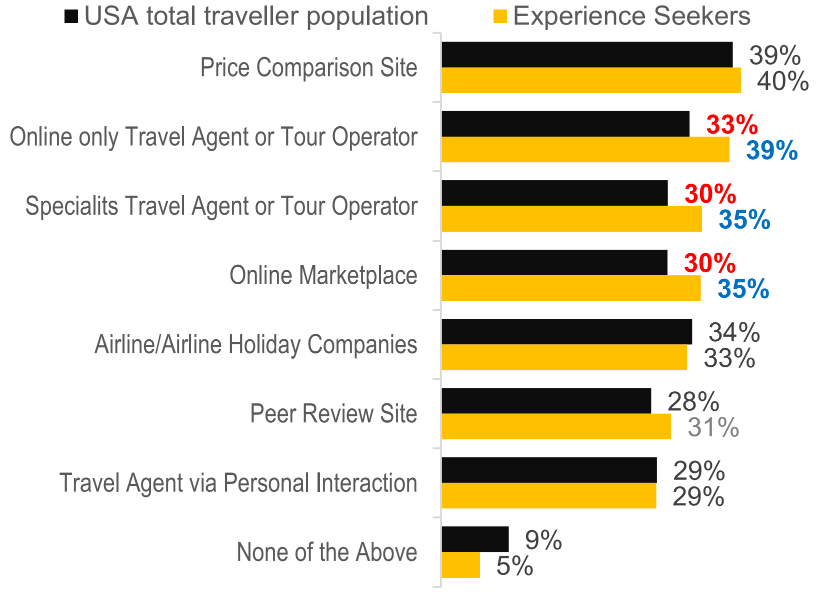
Despite their apparent independence, 55% are booking all elements of their trip (flights and accommodation) together and show a much higher propensity to do this via Price comparison sites.

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:

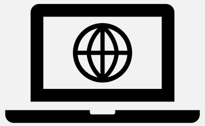



## RESOURCES FOR PLANNING:

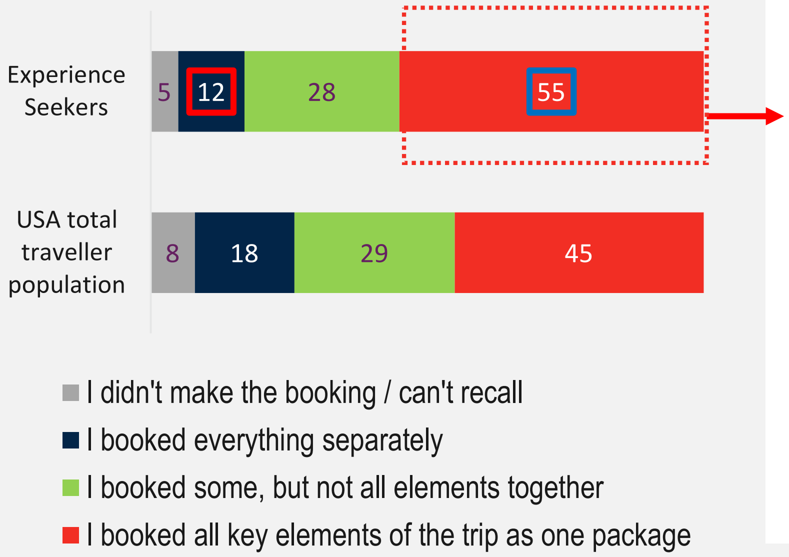



## TOOLS:

**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:




## 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

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