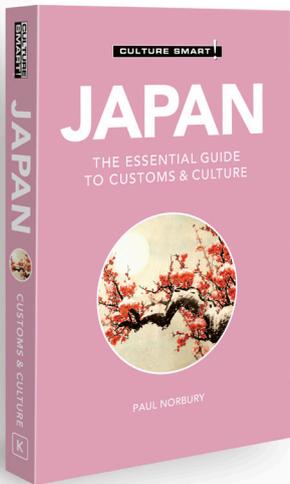


“The true voyage of discovery lies not in seeking new landscapes, but in having new eyes.”

MARCEL PROUST

MARKET REPORT 2017-2023



CULTURE SMART! is a unique series of pocket guides to over 100 travel destinations published by Kuperard Publishers and sold worldwide.

Culture Smart! guides help travellers to have a richer and more rewarding experience abroad by revealing the culture and customs of the country they are visiting. Readers include curious travellers, those going abroad for work, those relocating, digital nomads, language learners, and armchair travellers.

This report has been prepared by Stephen Mesquita, the author of the annual Nielsen BookScan Travel Publishing Year Book, which offers travel publishers a uniquely detailed analysis of the UK and International market for guides and maps.

Culture Smart!'s UK sales are on course to treble 2017-2023

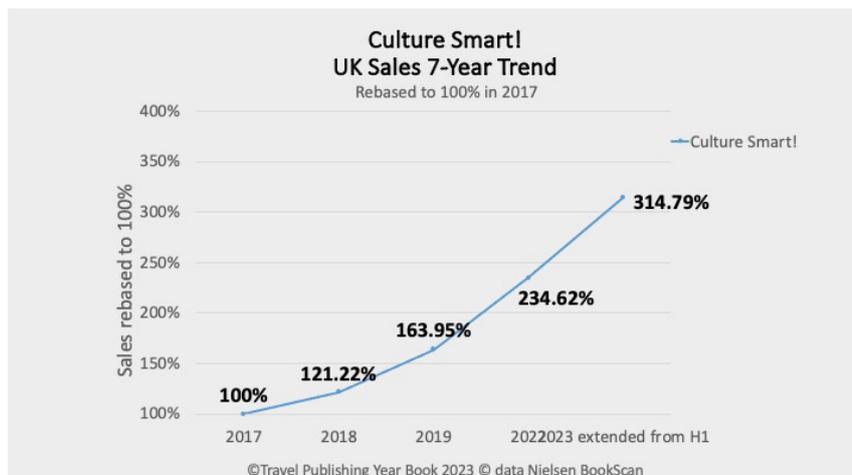


FIGURE 1

The sales of Culture Smart! are forecast to increase 93% in 2023 compared with pre-pandemic 2019.

This growth has been achieved against a background of falling sales post-pandemic in the World Travel Guides category (still down 26% H1 2023 vs H1 2019).

Culture Smart! – Global Growth

Culture Smart! has seen even more positive sales growth in the US market, with sales on course to treble between 2018 and 2023.

Culture Smart! has also been published in French, Italian and S.Korean editions.

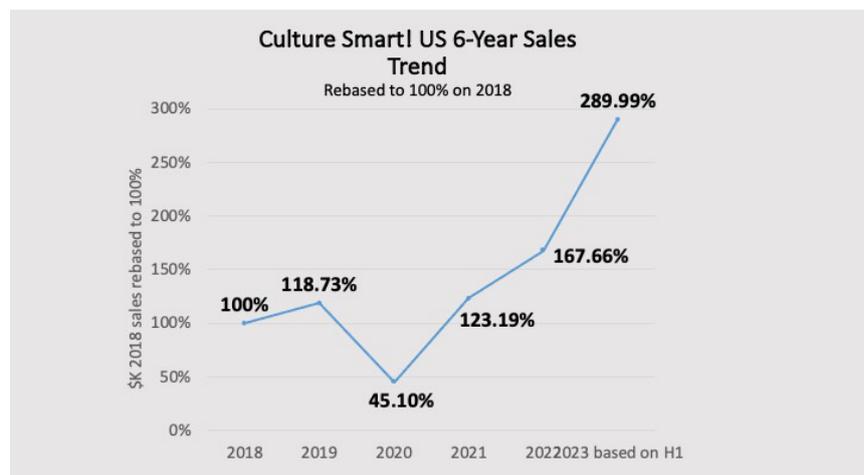


FIGURE 2

Culture Smart!'s UK market share has been growing substantially in a falling market



FIGURE 3

Since 2018, Culture Smart!'s share of the World Travel Guide category has grown between 20% and 50% per year – at a time when the market has fallen in every full year.

Culture Smart! has outperformed the market in its key regional destinations

Culture Smart!'s top-selling destinations cover the long-haul travel market. Long-haul is still running well below pre-pandemic levels – but Culture Smart! is outperforming the market.

Japan is the best-selling Culture Smart! destination.

Culture Smart! Japan sales were up 113% (2022 vs 2019) – over the same period Lonely Planet Japan sales were down 55%.

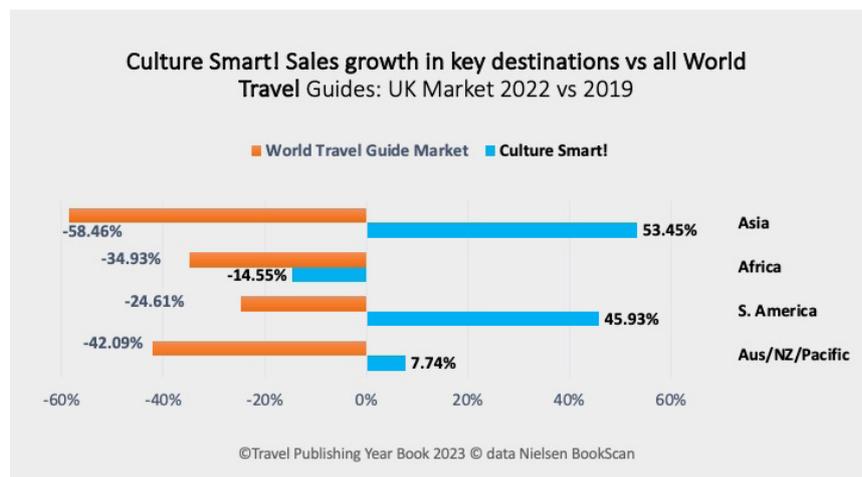
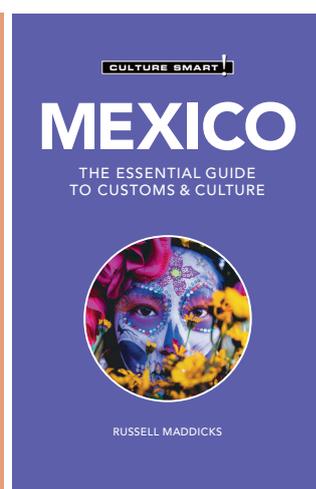
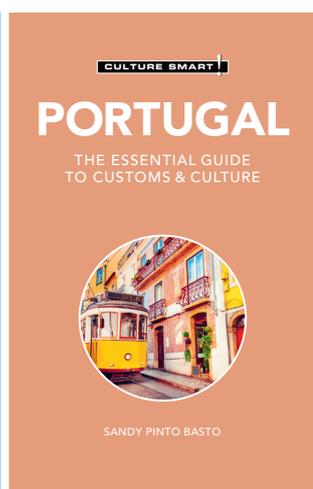
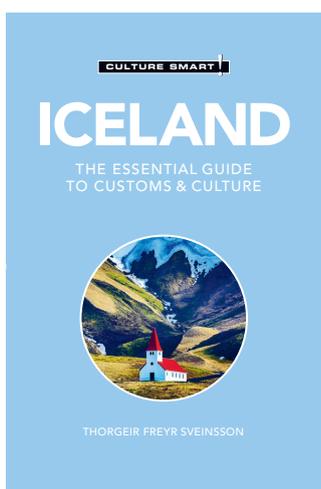
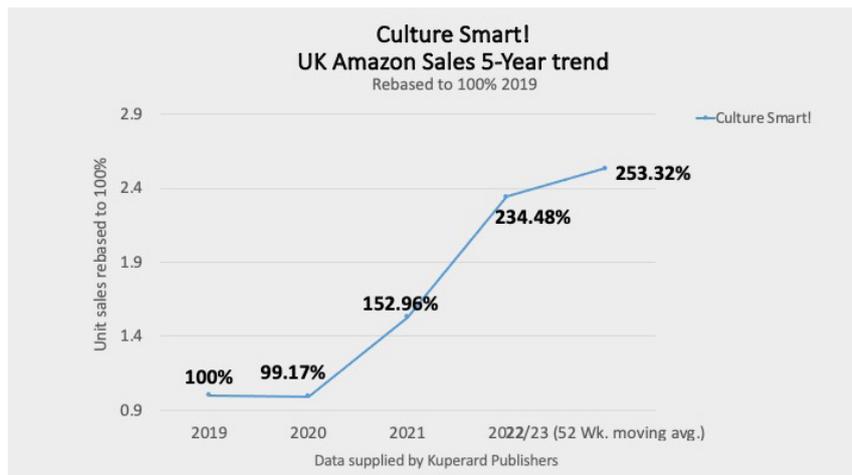


FIGURE 4

UK sales for Figs 1, 3 & 4 are based on data from Nielsen BookScan published in the Travel Publishing Year Book. Nielsen sales for the pandemic years of 2020 and 2021 have been omitted. Data for Figs 3, 5 & 6 supplied by Kuperard Publishers.



Culture Smart! UK sales growth has been typified by Amazon



Culture Smart! sales through Amazon are up post- vs. pre pandemic by over 150%.

FIGURE 5

Culture Smart! has been climbing the Travel Publishing Year Book's Pocket Guide rankings since 2017

The series now stands in 8th place – a jump of 11 places since 2017 – in the Pocket Guide series league table.

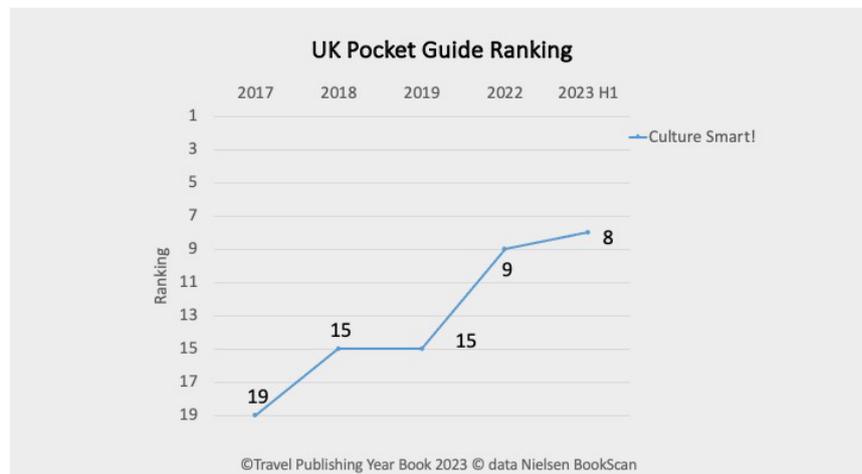


FIGURE 6

The Big Question – Why is Culture Smart! Out-Performing The Market So Spectacularly?

- Culture Smart! guides are designed to offer the traveller a richer and more meaningful travel experience.
- Unlike itinerary and site information, the cultural insight and practical information provided in Culture Smart! guides are not freely available online.
- Culture Smart! help travellers understand what makes people tick, the values they live by, and the kind of behaviour that will be reciprocated with goodwill and hospitality. This approach resonates strongly with today's traveller.
- A major relaunch with a contemporary new design introduced the series concept to a wider audience of readers and has been a major factor in the leap in sales. New editions continue to be published every year.
- The guides appeal to a broader market than conventional travel guides. Readers include short and long-term visitors, those relocating for work, including the growing digital nomad market, armchair travellers interested in world cultures, those studying abroad, language learners looking for a wider context, and those with family in other countries.

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