Discover England Fund Research Summary Report
London and Cultural England

January 2018

Contents

- This report brings together key findings and insights relevant to this project from across the VisitEngland research programme.
- It is designed to provide the Discover England Fund Large Project teams with a summary of the key themes and relevant market profiles. It can be used to guide project development activity and inform stakeholders and partner organisations.

Note 1: Sources are short-referenced on each page. Full details of data sources including links where appropriate are in included in the appendix.
Note 2: Data is not always available for all countries that are relevant to the project, due to limitations of the individual source research projects.

Introduction

Project overview

London & Cultural England

Where?

The definitive English twin-centre holiday made easy.

London & Manchester + The Lakes and Yorkshire Dales
London & Birmingham + Shakespeare's England and the Cotswolds
London & Newcastle + Famous castles (Harry Potter and Downton Abbey's Alnwick Castle) and National Parks

What?

- First time visitors will touchdown in London for an exciting, energetic few days visiting iconic landmarks and attractions; museums, galleries, the theatre then unwind as they discover England's culture and history, exploring outstanding places and breath-taking countryside.
- They'll depart from a different English city, allowing for minimal travel time whilst ensuring maximum holiday time.

Who?

First time visitors (Cultural Adventurers, 25 -39 yrs)
GCC – focus on the UAE and Saudi Arabia.
China – focus on Beijing as this is the only direct flight into Manchester, there are no direct flights into Birmingham.

US – With a focus on New York, given direct routes into London, Manchester and Birmingham.

India is a secondary target market

Why?

- London dominates England's inbound travel and only a minority visit another English destination as part of the same trip.
- Increase awareness of what England has to offer beyond London.
- Deliver steady, sustainable growth to the English tourism economy, through repeat visits.

Source: London and Cultural England

Key Messages and areas of focus

- **"Your time is precious, so choose a holiday that will both exhilarate and relax you. Visit London, a must-see world city and then travel beyond the capital to experience something unique in cultural England."**

- Our innovative project will introduce a new English tourism experience pairing one of the world's must – see, capital cities, London, with the history and heritage of cultural England through our partner 'hub cities' Manchester, Birmingham and Newcastle. Our new 4* + packages will be sold through our partner channels, making it easy for the customer, first time visitors (Cultural Adventurers, 25-39) from the Gulf Cooperation Council (GCC), China and the US to understand, book and visit; removing the pain points of multi-destination travel.

London and Partners have made extensive use of research data in their product and bid development already.

This report therefore focuses on three areas:

1. Recent research commissioned by Visit Britain exploring the expectations and experiences of **Mass Affluent** and **High Net Worth Individuals** travelling from China, US and the Gulf.
2. **India.** As a second tier target country for the project, we look at the available data on Indian traveller behaviours and attitudes.
3. A comparison of India and the focus markets (China, US, the Gulf) for
    1. The holiday purchase journey
    2. Social Media usage

Some recently produced summaries of data available for London, Manchester, Birmingham and Newcastle are included in the appendix. Whilst not covering target markets in detail, they provide an overview of the current behaviours of inbound travellers visiting these cities.

Source: London & Cultural England kick-off call December 2017

Further detailed information on trading with India can be found in the Visit Britain Market Profile Report:
https://www.visitbritain.org/sites/default/files/vb-corporate/markets/visitbritain_marketprofile_india2017.pdf
https://www.visitbritain.org/sites/default/files/vb-corporate/markets/india_snapshot_june2017.pdf

Context

The current situation

The appeal of the concept

Target markets present opportunities for London and Cultural England to develop and grow

Inbound Volume and Value

- Aside from US, the priority markets for London and Cultural England are currently smaller volume countries.
- Whilst both India and China saw decline in visitor numbers in 2016, the trend is reversing for 2017. In the first 9 months volume from India was up 43% and from China up 60%
- There is a low volume of visitors from the Gulf and whilst numbers are on the increase, there is volatility in the spend level, perhaps reflecting the spread of visitor types coming from that region.
- Growth from these markets cannot be taken for granted. Strong communication and product offer will be needed to encourage growth, along with positive political and economic developments in the source countries.

2016 Country	Visits ('000's)	Growth '15-'16	Spend (£ mill)	Growth '15–'16
India	139	-3% ↓	£97	+37% ↑
US	3,455	+6% ↑	£3,354	+11% ↑
China	260	-3% ↓	£513	-12% ↓
Gulf				
UAE	365	+5% ↑	£566	+16% ↑
Saudi	152	+3% ↑	£360	-35% ↓
Kuwait	112	+7% ↑	£222	-27% ↓

Source: IPS

In promoting London and Cultural England the current barriers to travelling beyond London can be addressed

4 main themes in the barriers to travelling beyond London:

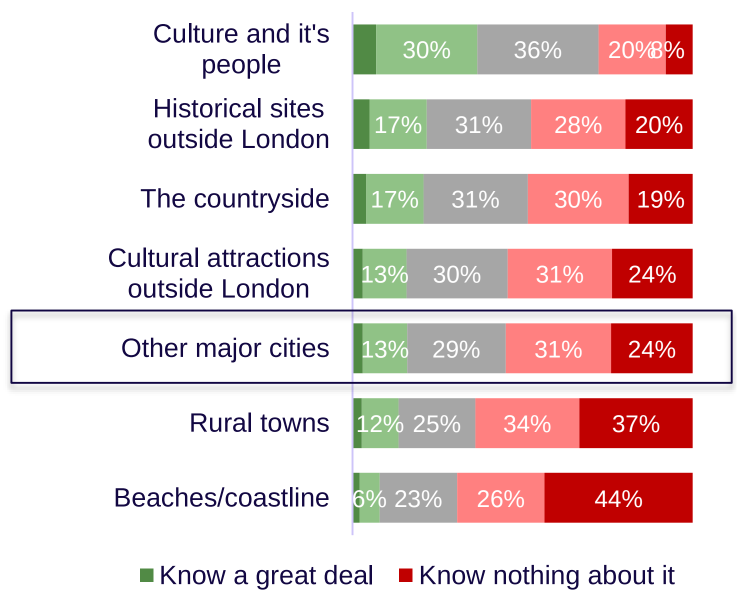
Implications

- Almost all these barriers can be addressed through strong communication of the two centre holiday offer, delivering London and a second destination.

The level of knowledge is low for attractions and destinations outside of London.

Less than 1 in 5 inbound visitors claim to know about our other major cities. This project is a great opportunity to help build that awareness.

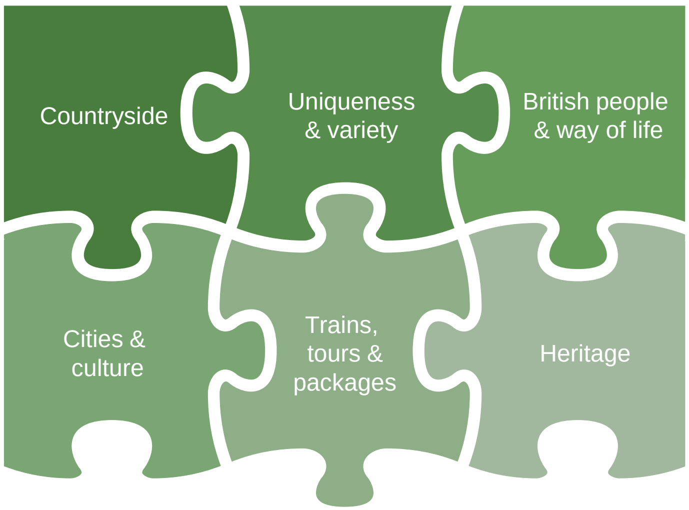
What do you know about Britain outside of London?



Source: VisitBritain Beyond London, 2013

Many of the triggers to travel beyond London align with themes included within the London and Cultural England proposition

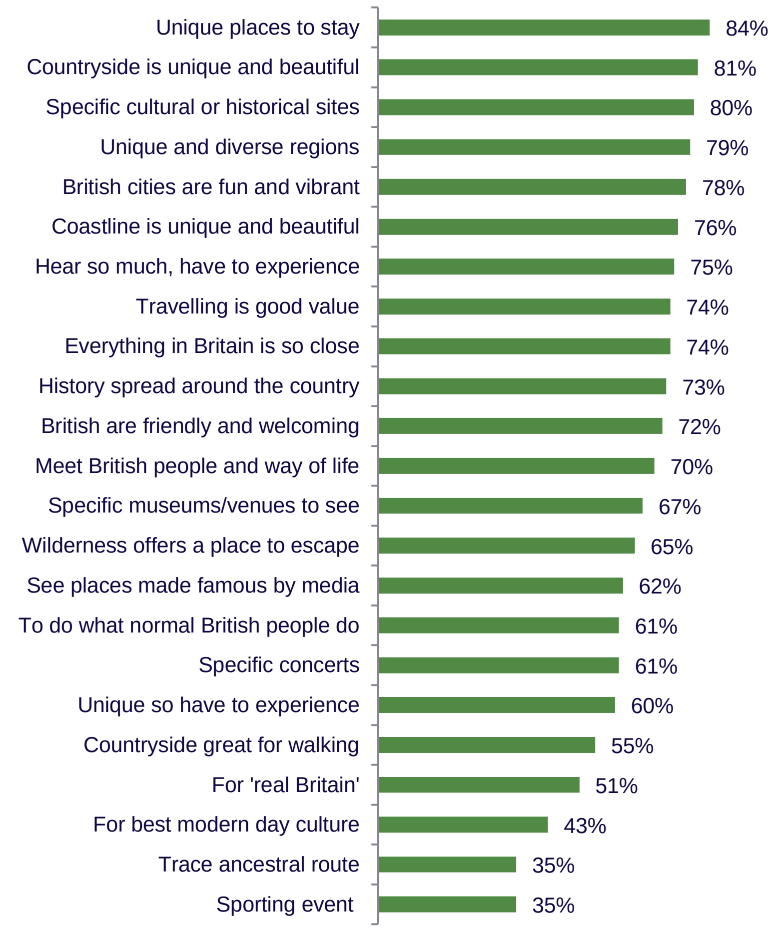
Triggers to go beyond London



Implications

- Main reasons to travel beyond London are themes that London and Cultural England can capitalise on.
- This is not just in terms of the vibrant cities, but also the uniqueness of those destinations.
- The countryside that will be seen on the journey and around the destination cities also has potential to be turned into an appealing attraction.

Aspects which would persuade recent 'London only' visitors to go beyond London



Source: IPS via Discover England: summary insights on overseas visitors to England's regions 2016

Concept testing reflects the appeal of the project, but also highlights the need to communicate clearly and demonstrate uniqueness

Discover London and Cultural England

I want to get the most out of my vacations, with trips that both exhilarate and relax me. I like to visit must-see world cities, but also get out and experience something unique about the destination and its culture.

'Cultural England' breaks are a new way to experience the vibrancy of London, the World's capital city, before a change of scene and pace puts you in the heart of cultural England. Our twin center vacations provide the best of both worlds, with minimal travel time and maximum holiday time to deliver a true sense of the English way of life.

Touch down in London for an exciting, energetic few days visiting iconic landmarks and attractions; its museums, galleries and theatre. Then unwind as you go deep into England's traditions and history, exploring outstanding sites of natural beauty and breath-taking countryside. Finally, you'll departing from a different English city, such as Manchester or Birmingham, to make your transfers and travel easy and hassle free.

London and Cultural England – discover more

Concept testing – US only

Positive take-outs
Excitement
Relevance
Allows me to see the real country
East to get around
Saves me time organising
Culture
History

It gives you a taste of different sides of England instead of solely just London, the big metropolitan city.

That it combines everything I would like to do all together. Less planning and stress to put together

I like the contrast of visiting both a large city and a more rural area. It seems like it would be a great taste of what the country is like.

The fact that one could see the important sites in London but then see the rest of the country and how the people are there in the way they live, culture, etc.

Possible **booking channels**: Online travel agent, specialist travel agent (in-line or in-store)

Watch-outs
Uniqueness
Adventure

Not being able to freely go from destination to another

It looks too exhausting

Afraid of being stuck most of the time in train

Note
- Given the difference seen in holiday expectations and behaviours across US, China and the Gulf, it will be important to test the concept content and positioning in the other markets to ensure optimal positioning.

Implications
- For the US the concept works well. Potential barriers are limited, but do give indicators for topics to cover in communications:
  - Journey times to second destination (and ease/convenience of travel).
  - Flexibility in itinerary to allow for down-time and/or personalisation.

Source: DEF Concept Testing 2017

1. Meeting the needs of Luxury Travellers

Overview of the Luxury Travel Research

- This research was carried out Spring & Summer 2017. The objectives were to understand more about luxury tourists and what Britain should offer them.
- It explored similarities and differences across the markets and how best to reach these audiences

	Quantitative				Qualitative		
MARKET	HNWI	MASS AFFLUENT	TOTAL		HNWI	MASS AFFLUENT	TOTAL
	53	400	453		5	5	10
	50	200	250		5	5	10
	50	200	250		5	5	10

Mass Affluents

US$150,000 - $1 Million in liquid assets

High net worth individuals

$1 Million plus in liquid assets

- This section of this report contains a summary of the findings and insight most relevant to the London and Cultural England project

Source: VisitBritain Luxury Travel Research 2017

Note: The results are non-weighted and that, as a consequence of the sample definition, the US results are slightly more skewed towards the perceptions and attitudes of the Mass Affluent group than in the other two markets

Luxury Travellers

Luxury holiday requirements and perceptions of Britain

Authentic experiences are essential for luxury holidays, as are top class hotels & travel. The Gulf states need ultra-personalisation

Essential
For a luxury holiday

1. Authentic experiences/activities
2. Tailor-made itinerary for most days but available days for spontaneous activities
3. Business-class travel
4. 5* or above accommodation
5. Hotel or other concierge service
6. Access to airport lounges
7. Short transit
8. Local destination advisor
9. Michelin star restaurant
10. Private local guide

Essential
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1. Authentic experiences/activities
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3. 5* or above accommodation
4. Short transit
5. Michelin star restaurant
6. Access to airport lounges
7. Hotel or other concierge service
8. Tailor-made itinerary for all days of travel
9. Local destination advisor
10. Private local guide

Essential
For a luxury holiday

1. Hotel concierge or other concierge service
2. Authentic experiences/activities
3. Access to airport lounges
4. Private local guide
5. Private chauffeur
6. 5* or above accommodation
7. Short transit
8. First class flights
9. Business-class travel
10. Michelin star restaurant

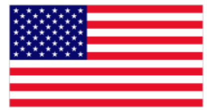
Rank order of % essential

- Authenticity is the key theme that resonates in all countries.
- The greater degree of personalisation and uniqueness demanded by Gulf travellers is evident. Tailor-made itineraries are the most important element of their holiday and access to a private guide is more important to Gulf travellers than those from China and US.
- The relative importance of short transit should be considered for the start and finish points of itineraries.
- The importance of First and Business class travel and airport lounges is relevant when looking at services provided through the regional airports.

Source: VisitBritain Luxury Travel Research 2017

Perceptions of Britain tend to focus on history, grandeur and royalty

- There is reasonable consistency in perceptions of what Britain is across the countries.
- Historical and Classic are key associations that can also serve as foundations for uniqueness, authenticity and luxury.
- Most travellers do not perceive barriers to travelling to Britain, but those that do mention terrorism/safety concerns, the weather and visa regulations.
- The view from the Gulf is more experience-led than for China and US, which supports a more personal, experience-led positioning as noted previously.

	What best describes Britain?	What makes Britain stand-out?
 Exclusive – Royal & Historical	**Historical** **Classic** **Royal**	1. Rich history 2. Heritage, culture & architecture 3. Traditional image
 Luxurious – Noble & Grand	**Royal** **Elegant** **Classic** **Historical** **Noble**	1. Heritage, culture & architecture 2. Rich history 3. Capital City
 Experiences – Innovative & unexplored	**Comfortable** **Historical** **Relaxing** **Luxurious**	1. Luxury experiences 2. Relaxing experiences 3. Capital city & Family friendly

Source: VisitBritain Luxury Travel Research 2017

Customised cultural experiences, VVIP treatment and exclusive activities are important for luxury travel in Britain

Elegant food service, room with view, being met at airport and driven to destination, private tour of houses and gardens; spa type bathroom.

Private tour guide accompanied by private drivers driving high-end cars.

Visit the wealthy football club and star.

Customized travel options & accommodation. Royal treatment at the places where we choose to stay.

Relaxed & hassle-free

Amazing **experiences** and luxurious **relaxation** which goes beyond the expected. Luxury means everything feels **seamless**, with no hitches in the way and nothing to worry about in order to have a truly relaxing experience

Premium food & drink

Exclusive and highly meaningful experiences which reflect the country's **culture**. Tailored and **small groups** with a Chinese speaking guide allowing them to experience **high level comfort** when travelling

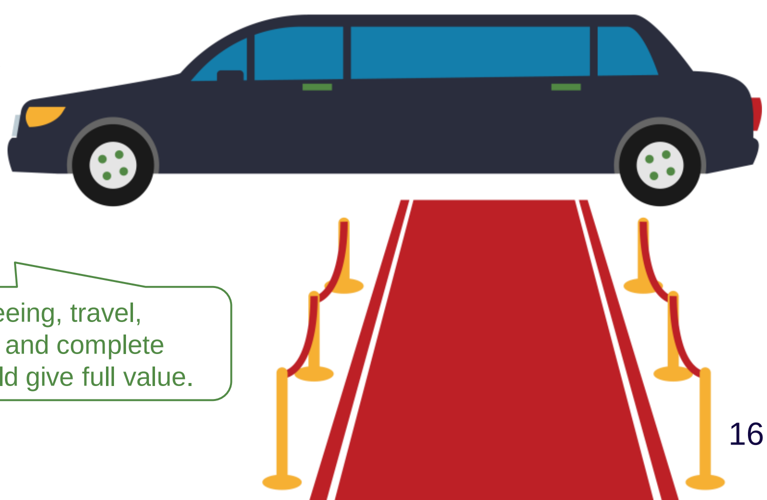
Relaxed & unique

Personal high level exclusive service at every touchpoint. Private tours and shopping trips are a must. Genuinely lavish and **VIP experiences** with no queues and exclusive access. Travel must encompass extremely **personalised tailor made** service

A private or semi private tour through the countryside offering information on the history and development of the area.

Everything inclusive. All we have to do is show up and prepare to have a good time.

Private luxury accommodation, Michelin recommended restaurants, luxury shops.



Wherever I go, whatever places I visit, I prefer to have VVIP treatment. Also, if I am going to watch a game. I want my seat to be in the most premium stand.

It should cover sightseeing, travel, authentic special food and complete entertainment. It should give full value.

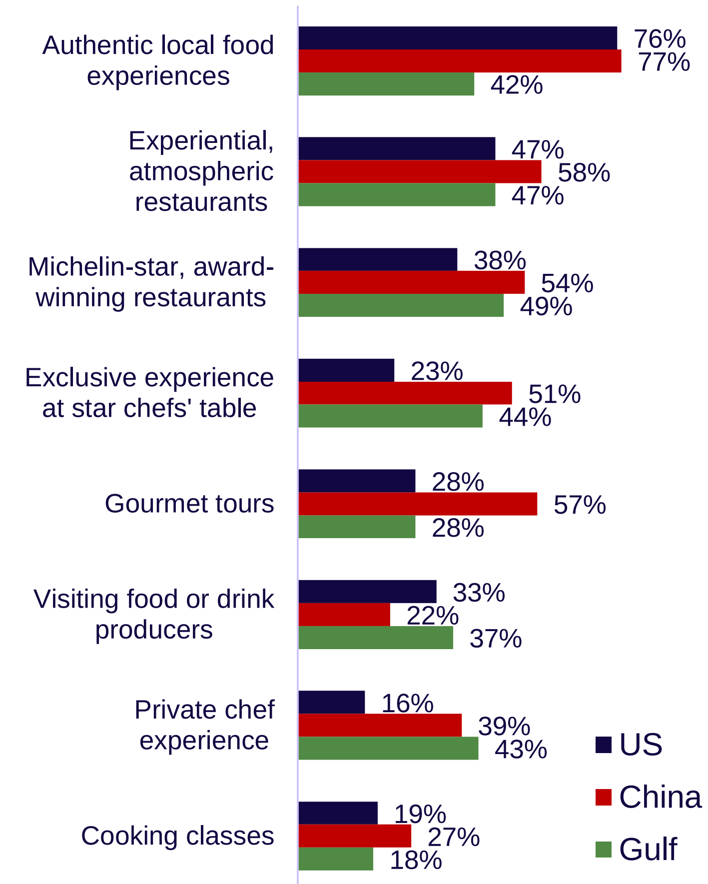
Source: VisitBritain Luxury Travel Research 2017

Luxury Travellers

Experiences that enhance the luxury holiday

Food and drink has the potential to enhance and even define the luxury holiday experience

What would you like on a luxury holiday?



Authenticity for US travellers is most important.

Cuisine is very important for the Chinese and many like to photograph and show their friends back home what local food they eat on holiday.

"I like to try different cuisine when I travel and enjoy when the dish is as beautiful to look at as well as delicious to eat."

Exclusivity and proven top-class food is key for Gulf travellers. Unique, priviledged experiences with recognised top chefs and restaurants are of most interest.

"I like to have a private chef for my family so we can enjoy a meal catered exclusively for our taste."

- The food offer is an important part of the holiday experience.
- There are differences in the requirements for each country that are important to consider, both in itinerary development and communications activities.
- Visitors from the Gulf are the most demanding in terms of personalised exclusivity.
- Visitors from China are looking for more reassurance and 'bragging rights' through tours and award-winning restaurants etc.

Source: VisitBritain Luxury Travel Research 2017

Accommodation needs illustrate both the expectation of high quality, but also of something uniquely British

- Luxury hotels are the usual choice for visitors from all countries.
- For China and the Gulf particularly the interest in staying in stately homes and/or castles provides an interesting opportunity for itineraries. Though it is important to make sure the 'modern' elements are available and visible (phone chargers, heating etc.)
- Luxury hotels in London and access to unusual historic accommodation in Birmingham/ Manchester/ Newcastle could add to the perception of authenticity, uniqueness and a premium experience.

Where?
Would you most likely stay on holiday in Britain

"It's all about the details when I stay in a hotel. The service needs to be meticulous and given I live normally close to a 5 star hotel, I expect so much more when I travel. Things in the hotel -universal electric adaptors, accessories case, iPhone charger"

1. 4-Star hotel
2. Luxury 5* plus hotel
3. Boutique hotel
4. High-end guest house/bed and breakfast
5. Castle

1 = Luxury 5* plus hotel
1= Stately home or historic house
3. Castle
4. Serviced apartment/house/cottage/villa
5. High-end guest house/bed and breakfast

1. Luxury 5* plus hotel
2. Stately home or historic house
3. Castle
4. Boutique hotel
5. 4-Star hotel

"The Staff referred to me and my family by name – felt like they know me and I felt important."

Source: VisitBritain Luxury Travel Research 2017

Shopping is an important activity for wealthy travellers, but individual market expectations differ greatly

- Whilst shopping is an important activity for visitors, the type of shopping that visitors from each of the three focus countries wish to do varies considerably and so itineraries therefore need to be tailored for the individual markets.
- The US tend to look for 'mainstream' products from 'regular' stores, Oxford Street, The Bull Ring etc.
- The Chinese interest in Outlet shopping for fashion and accessories is evident and could impact itinerary planning to include Lowry Outlet, Resort World or Royal Quays.
- Gulf visitors are attracted by more unique personalised shopping experiences, that could be provided in London or the other cities.

	What? Would you buy in Britain	**Where?** Would you shop on holiday
	1. Women's clothing & footwear 2. Alcoholic drinks 3. Gourmet food 4. Tea	1. Luxury department stores 2. High-street shops 3. Boutique & designer stores
	1. Women's clothing & footwear 2. Men's clothing & footwear 3. Cosmetics & toiletries 4. Gourmet food	1. Luxury department stores 2. Shopping malls 3. Luxury Outlet villages
	1. Antiques 2. Art 3. Games, toys or gifts for children 4= Holiday Souvenirs 4 = Cosmetics & toiletries	1. Personal shopping experiences 2. Luxury department stores 3. Boutique & designer stores/flagship stores

Source: VisitBritain Luxury Travel Research 2017

Luxury Travellers

Booking process and holiday habits

Sources of inspiration, information and advice differ by country and by stage in the holiday journey

- Pre-holiday information and inspiration comes from a mix of both online and offline sources.
- Lifestyle magazines are a key channel through which to communicate.
- Visitors from the Gulf and China place high importance on information directly from other people, whether their own connections or staff at hotels, drivers, tourist information.
- This highlights the importance of knowledgeable, helpful staff at all touchpoints on the itineraries .

	Inspiration For luxury travel	Information Before travelling	Information In destination
1	Word of mouth	Websites & apps	Concierge
2	Previous visit	Guide books	Websites & apps
3	Websites & apps	*Word of mouth	Tourist info centre
4	Social Media	Social media	Locals met on trip
5	Travel magazines	Travel magazines	Local guide

1.	Word of mouth	Websites & apps	Websites & apps
2.	Pictures on social media	Word of mouth	Local guide
3.	Recommendations on social media	Online travel agency	Tourist info centre
4.	Travel websites & apps	Social media	Friends/family
5.	Luxury/shopping magazines	Guide books	Locals met on trip

1.	Word of mouth	Word of mouth	Friends & family who know destination
2.	Recommendations on social media	Social media	Travel agency rep
3.	Previous visit	Luxury/lifestyle/ shopping magazines	Concierge
4.	Pictures/experiences shared on social media	Websites & apps	People travelling with
5.	Social media influencers in their country	Online travel agency	Local chauffeur/driver

Note: Unless otherwise specified, all websites & apps are travel websites & apps providing traveller's recommendations e.g. Trip Advisor etc.; and 'Social media' is also direct recommendations on social media. Friends & family who know the destination

Source: VisitBritain Luxury Travel Research 2017

There are differences across the countries in booking behaviours that need to be considered when engaging with the travel trade

Booking Behaviour

- US travellers are most likely to book independently and direct with the accommodation/transport providers.
- China & Gulf tend more towards packages or combined bookings. Both markets tend to use luxury or specialist travel agents.

How usually book holidays	US	China	Gulf
Transport & accommodation separately	69%	31%	31%
Package – accommodation, airline, other elements	16%	48%	60%
Airline & accommodation together	21%	42%	49%

Booking Behaviour

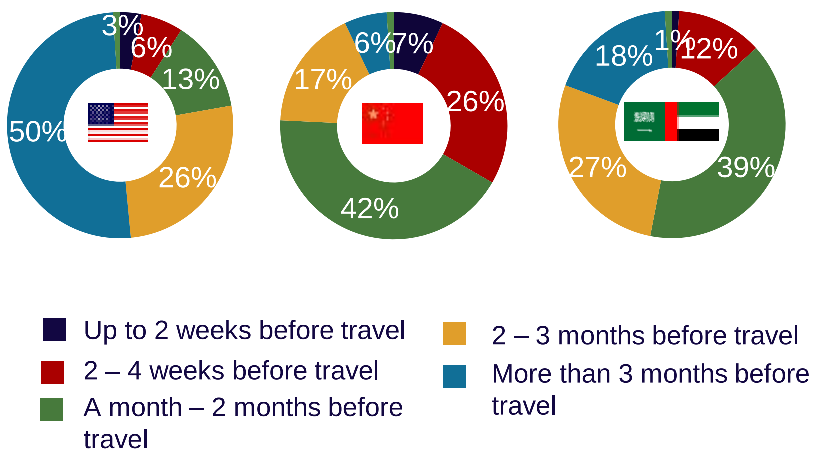
- US **(79%)** and Chinese **(82%)** travellers are most likely to book online
- Travellers from the Gulf use a mix of channels including phone and face to face, perhaps reflective of the share of bookings made by personal assistants **(46%)** rather than one of the travelling group

- There is a marked difference between US and China/Gulf in terms of booking behaviours and channel. This will have a direct impact on communications activity.

Source: VisitBritain Luxury Travel Research 2017

There are differences across the countries in booking behaviours that need to be considered when engaging with the travel trade

Book Flights



- There are considerable differences in how far in advance travel is booked:
  - Booking are typically made 1-2 months before travel in China and the Gulf, contrasting the US who are most likely to book more than 3 months before travelling.

Top 3 booked BEFORE trip			
All accommodation	88%	80%	68%
Transfer from airport to accommodation	71%	54%	79%
Transport at destination	75%	54%	65%
Top 3 booked DURING trip			
Table at restaurants	54%	56%	42%
Day trips	50%	56%	44%
Activities	45%	49%	47%

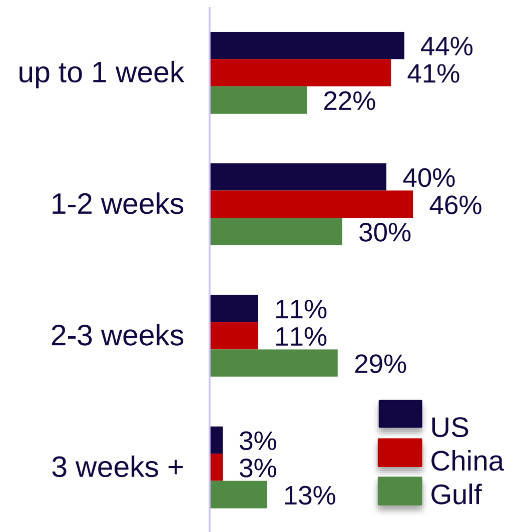
All the accommodation is **booked in advance** for the majority of travellers, as is transfer among Gulf and internal transport among US. Restaurant table bookings and day trips are more commonly booked during the trip.

- There is still scope to encourage more advance bookings of transport and activities in all markets

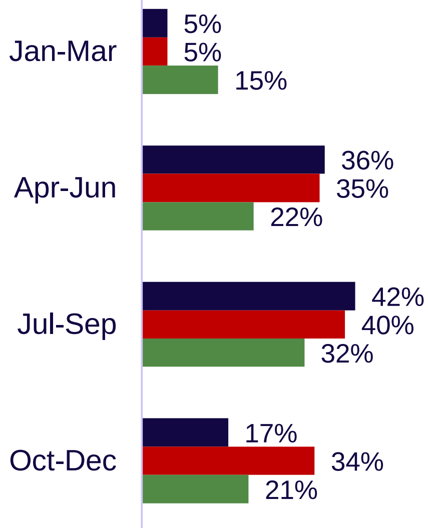
Source: VisitBritain Luxury Travel Research 2017

Holiday behaviours among long-haul affluent travellers

How long would you stay in Britain for?

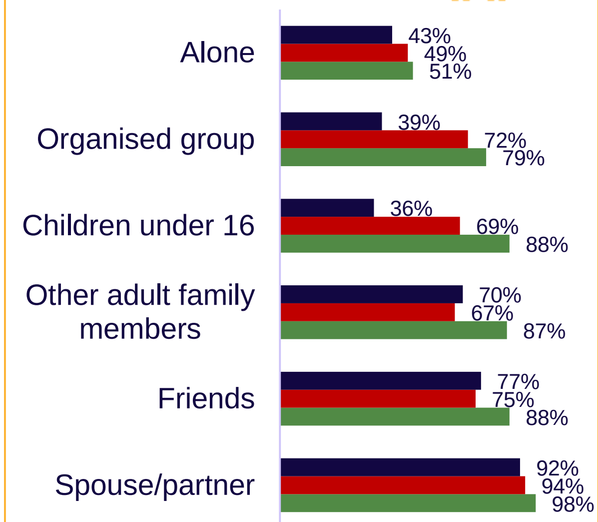


What season would you like to visit Britain in?



Who do you usually travel with on luxury holiday?

% Always/Sometimes



- Visitors from the Gulf are the most likely to stay the longest, but from all target countries trips are most often over a week, though it should be noted that this study was about Britain and for many that is currently assumed to be a trip including London and Scotland, rather than other English destinations. Within England university cites (Oxford & Cambridge) are also popular
- Whilst peak summer remains the most popular choice in each country there is also a good demand for the shoulder seasons, with Oct-Dec strongest with the Chinese (Golden Week at the beginning of October) This illustrates the good fit between target market behaviours and the London and Cultural England product offer.
- People from the US are least likely to travel with children. Travellers from the Gulf and China are more likely to travel with an organised group.

Source: VisitBritain Luxury Travel Research 2017

Summary – Luxury Travellers – US, China & Gulf

Consistent themes across all countries	Actions
Authentic experiences	Experiences, accommodation and food & drink options that are authentic
Luxurious accommodation	Top class hotels, transport and service levels are expected
Local, knowledgeable guides	In hotels, drivers etc
Excellent food & drink	An important element of the holiday and should be included within itineraries
Shopping	All countries want to shop in luxury department stores, so include within itineraries
Lack of knowledge outside of London	Opportunity to educate on travel options and the luxury holiday offer

Country-Specific themes	Actions
Gulf Ultra-personalisation	Personalised tours and unique luxury experiences are essential
China The Royal family	Itineraries that include Royal buildings etc will appeal, though not necessarily a topic to lead on
China Want food guidance and/or bragging rights	Inclusion of food and drink experiences, famous and award-wining chefs and restaurants
Shopping US Mainstream China Outlet Shopping Gulf Personalised luxury	The different shopping requirements may need promotion of different shopping destinations for each country
Gulf Extended holidays	There may be scope to offer longer holidays to the Gulf states with catering for larger travel groups and specific needs (e.g. halal)
US & China Book online Gulf – more phone bookings	Choice of trade partners and communications should reflect different channel usage

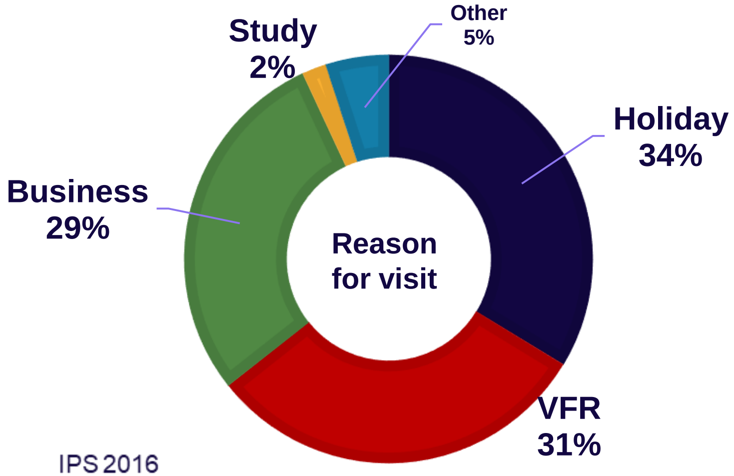
2. India

Expanding the opportunity to new markets

An overview of the international travellers from India

Key Facts

- India ranks **18th** for volume and **14th** for value of inbound visitors. to UK: **415,000** visitors in 2016, spending an average of **£1,042** per visit.
- Holiday visits account for a third of this volume.
- Destinations are primarily London (66%) and the rest of England (43%). Only 8% go to Scotland and 2% to Wales, so there is already a dominance of visitors to England and a propensity to visit places other than London.
- Heathrow and Birmingham, are the major direct gateways from India, reflected in 14% of visitors from India staying in West Midlands.
- Over half of the visits to Britain from India were made by people who reside in the province around Mumbai (Maharashtra) and in Delhi.



IPS 2016

Transport Overview

- Visitors from India are more likely than others to use private coaches/minibuses or taxis to travel around the country, suggesting that the concept of private tours will resonate as well as public transport options.
- Visitors from India are much more likely to book transport before they arrive in Britain. This apples to both public and private transport.

Economic Forecast

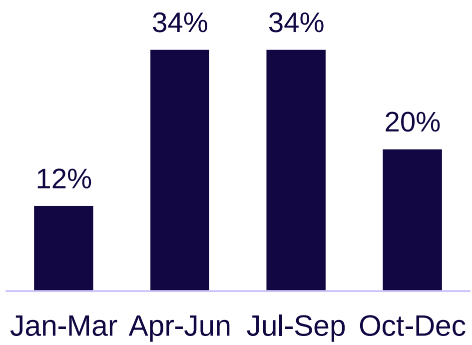
Oxford Economics predict the Indian middle class volume will double in 10 years and it is forecast that the population will be bigger than China by 2022. India ranked 12th in 2015 globally for the volume of High Net Worth Individuals.

- The economy is strong, despite occasional blips, but GDP is low.
- Macro data therefore points to a continued growth opportunity for inbound tourism from India, particularly around a medium to high-end product.
- The population in India is one of the youngest globally. Only South Africa has a lower forecast for the proportion of the population aged over 65 years.

Source: VisitBritain Market and Trade profiles

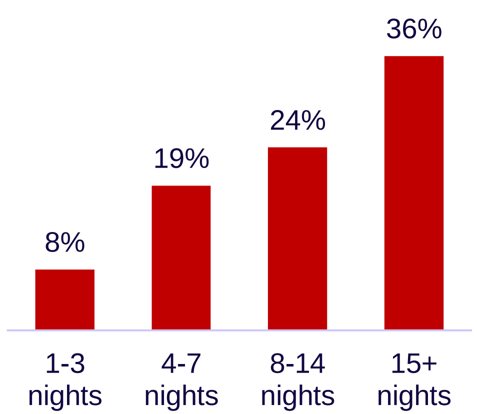
An overview of the international travellers from India

Seasonality – holiday visits 2016



April-September is the main period for visitors from India

Duration – holiday visits 2016

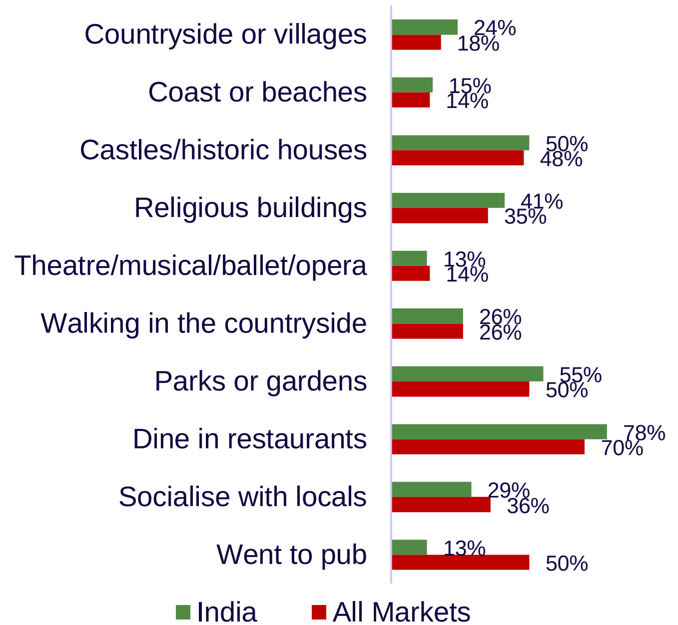


Holiday visitors from India stay longer than visitors from many other countries. This duration may be extended through visiting friends and relatives as part of the holiday trip

Activities

- Visitors from India take part in a broad mix of activities both urban and rural
- Notably whilst they are likely to dine in restaurants they are highly unlikely to visit pubs. This needs to be borne in mind when developing itineraries for the Indian market as some food & drink destinations may not be appropriate

Activities done whilst on holiday in Britain



Filtered on India and purpose of travel (low base size warning)
https://www.visitbritain.org/inbound-tourism-trends

People from India are very positive about the UK. They are positive about both the history/heritage and the natural beauty of the country

UK Ranking	Average RANK (across 50 countries)	India	China	US
Rich in historic buildings & monuments	5	2	5	6
Vibrant city life & urban attractions	4	2	3	3
Would like to visit if money were no object	6	6	3	6
Rich in natural beauty	24	7	12	21
Interesting & exciting contemporary culture	3	3	4	4
Excels at sport	4	5	5	5
Has a rich cultural heritage	7	3	5	10
If visited, people would make me feel very welcome	13	10	6	5

The positive way in which UK is perceived by people in India is a strong foundation from which to engage with the travel trade and increase visitor volumes. The only watch-out is around the welcome and it would perhaps be important to try to communicate the personal warmth of the country alongside the experiences and attractions.

Notes:
- No GCC countries included in the GfK-Anholt NBI research
- This study uses a population representative sample, so is not specifically targeting travellers

Source: GfK Anholt NBI Research, 2017

Indians feel they know the UK and are positive about it. This provides a strong platform from which to communicate more details of the London and Cultural England offer

Familiarity & Favourability

	UK's rank for favourability	UK's rank for familiarity
India	4	4
China	8	3
US	5	4

People in India claim familiarity with UK and see it positively.

Among visitors from India who holiday in Britain, other countries considered were:

France 39%
US 38%
Switzerland 36%
Australia 30%

Only **11%** considered only Britain

Associations with UK

- Indians main associations with UK are
  - **Museums**
  - **Films**
  - **Sports**

- The US and China see visits to the UK as **educational, fascinating** and **exciting**.
- Those same attributes are seen by Indians, who also say it is **romantic** and **relaxing.**
- This illustrates again the 'rounded' view of UK that people in India have and is a good foundation for the London and Cultural England product.

- 85% of Indian like to 'immerse themselves in the culture and feel like a local' when travelling to a foreign country. This compares to 75% of Chinese, 82% of Americans, 69% of those from Saudi Arabia and 66% from UAE.
- There is clearly opportunity to promote product and experiences in India that will provide this authentic experience of England.

Notes:
- No GCC countries included in the GfK-Anholt NBI research
- This study uses a population representative sample, so is not specifically targeting travellers

Source: GfK Anholt NBI Research, VisitBritain Decisions & Influences Research, 2017

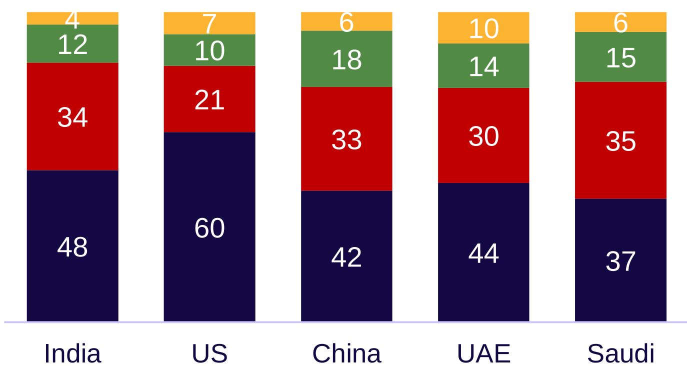
India and the focus countries

The purchase journey

The planning process: Starts a long way in advance, particularly in US and to a lessor extent India, but the booking is often done relatively 'last minute'

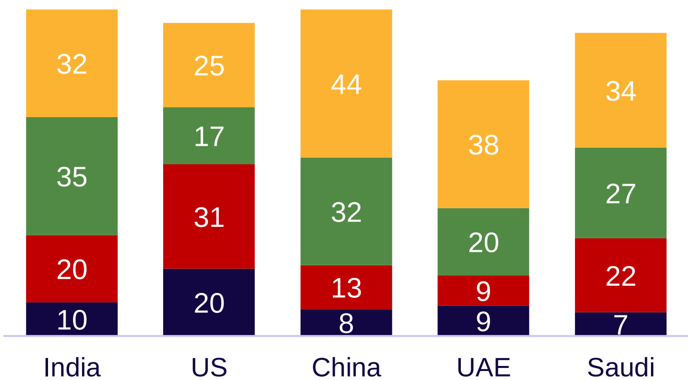
Started thinking about their holiday to Britain (%)

- The long haul journey and perhaps visa planning etc. Extend the planning time, particularly for US and India
- This highlights the need for a 12 month communications cycle to capture all visitors considering a trip to England.



Booked the trip to Britain (%)

- However, booking is a different story with 2/3 of Indians booking within 2 months of travel. This proportion is even higher for visitors from China. This may be influenced by waiting for Visa approval prior to making the booking
- This suggests there needs to be ongoing communications to ensure England remains on the shortlist of destinations from first consideration through to booking.



Note: High level of 'no answer' to this question in UAE

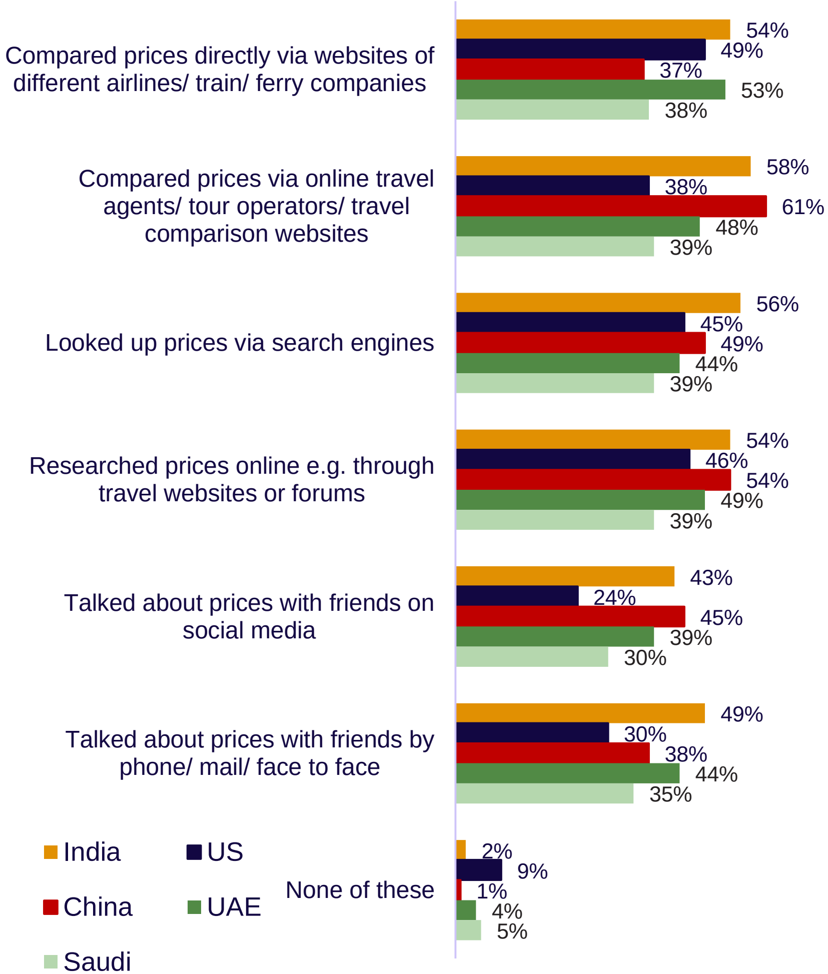
More than 6 months before | 3-6 months before | 1-2 months before | Less than 1 month before

Source: VisitBritain Researching and Planning Research, 2016

Price Sensitivity and the role of Online Travel Agents

Price sensitivity is an issue in all markets and use of price comparison sites and search engines is high in India and China. Those who would visit from India show a high level of activity around price checking and price comparisons.

% who would do this before booking a holiday to Britain



The Role of OTAs

- OTAs have grown over recent years and new brands and propositions have been launched. Airbnb has over 3m listings, Booking.com has nearly doubled in size since 2015. Consolidation has led to Expedia and Priceline, Orbitz Worldwide and Travelocity dominating.
- Most operate on global or at least multi-market platforms. Technology drives the offer; app solutions are increasingly popular.
- With an ethos of 'making travel easier' they are looking to incorporate a wider range of travel activities into their portfolios.
- OTA's play a significant role in enabling travellers to be confident with the price they are paying.

	India	US	CH	UAE	Saudi
I often compare prices from multiple OTA websites	82%	79%	80%	64%	66%
OTAs are a good way of finding a destination within my budget	79%	75%	80%	58%	70%
Best way of getting the lowest price	74%	66%	64%	58%	65%

%Strongly agree/agree about booking travel though OTAs

- OTA's are also seen as providing a wide choice and easy to use. However the brands are not necessarily differentiated and therefore loyalty appears to be low.

Source: VisitBritain Researching and Planning Research, 2016

The concerns raised by the travel trade in Europe and US will be relevant also when working in China, the Gulf and India

- The Travel Trade included in the 2017 research was in Europe and US. However there was consistency in the themes that emerged and it is reasonable to assume similar topics should be considered when working with the trade in London and Cultural England's focus countries

Note: Travel Trade comments here are based on European and US trade

Challenges to Address

Highlighted by OTAs as issues to be resolved:

- Lack of understanding among DMOs and hotel chains on how OTAs operate.
- Reluctance of some DMOs and chain hotels to share commission with OTAs.
- Attractions do not always understand how to sell online and/or work on short lead times.

Actions

Increase the amount of product bookable online.

Create better linkage between destinations e.g. multi-location tours e,g, 4-5 day coach trips from & back to London

Package the regional air options:

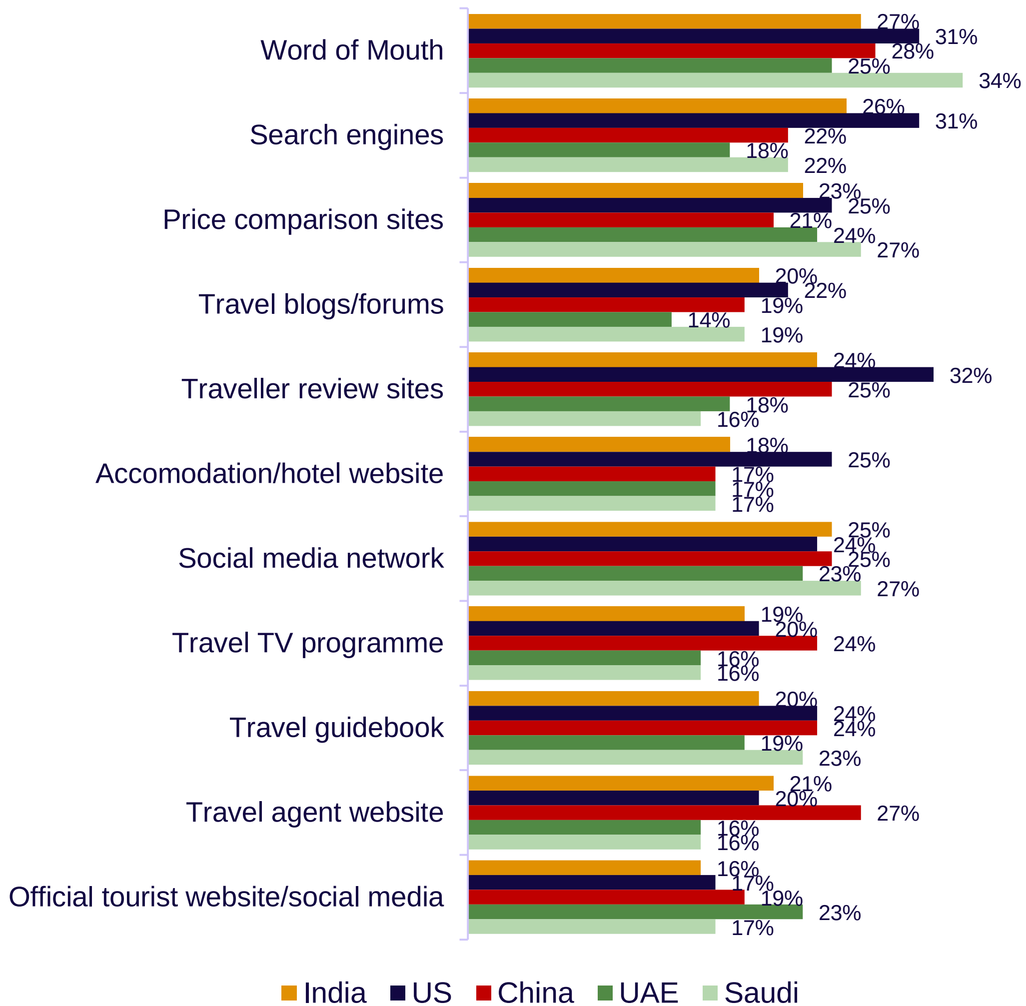
- competitive prices
- short transfer times
- provide clear info on travel times

Travel Trade in India

- The Indian travel market is quite fragmented with c.150 travel agents in the main cities of Delhi, Mumbai, Chennai, Bangalore and Kolkata, with many focused on ticket-only lower end of the market. Some activity may be needed to identify the right partners for a more premium, inclusive product.
- Online booking is becoming increasingly popular, but at present the trade still plays a pivotal role in booking outbound travel. Besides Indian OTAs are quite different from the most common definition: they have call centres where consumers can call in to book, or modify their bookings, as well as staff that can collect cash from consumers' residence or office for bookings, or networks of sub-agents doing so
- Recently the OTA market started to consolidate with the merger between two main players, MakeMyTrip and the IbigoGroup, that was approved and completed in January 2017

Source: https://www.cloudbeds.com/articles/analysis-major-online-travel-agencies-otas-update-august-2017/, DEF Travel Trade Research June 2017, VisitBritain Decisions & Influences Research, 2016

Key influencers: Online and offline sources both play a role influencing choice of Britain as a destination



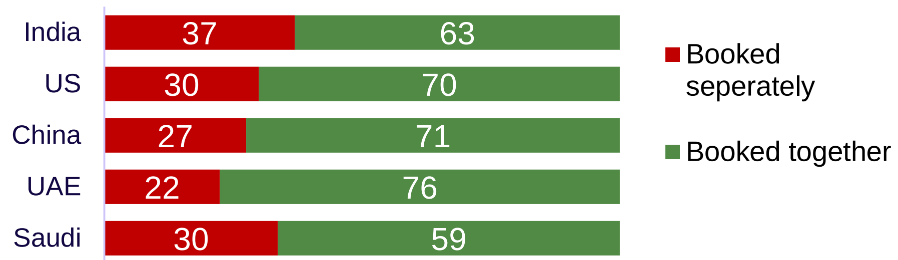
- Reviews and recommendations are important to visitors from all the target countries.
- People in India also rely on other off-line sources:
  - Official tourist brochures about Britain (22%).
  - Travel feature in magazine/ newspaper (21%).

- Providing material to support word of mouth activity will be important for building awareness and consideration of Britain as holiday destination.
- This includes personal networks, travel trade, travel media and official tourist networks.

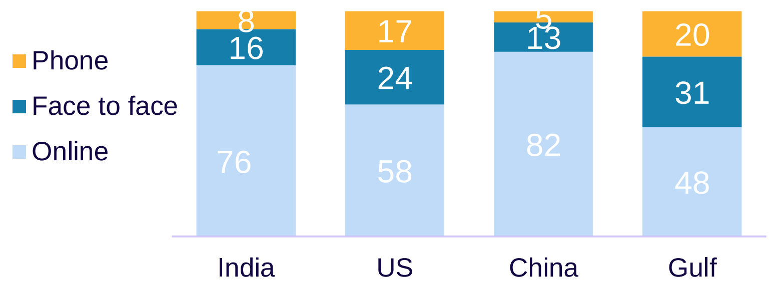
Source: VisitBritain Researching and Planning Research, 2016

Making the booking: an online dominated process

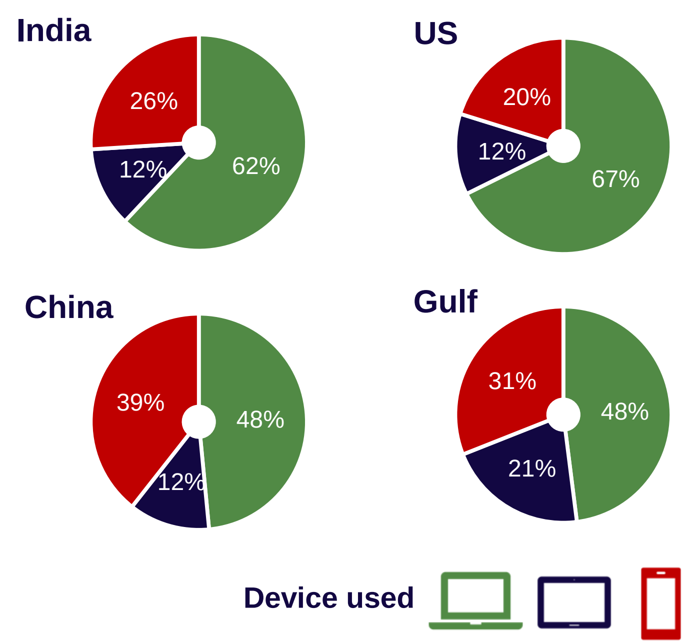
Travel & Accommodation Booking (%)



Channel used to book package

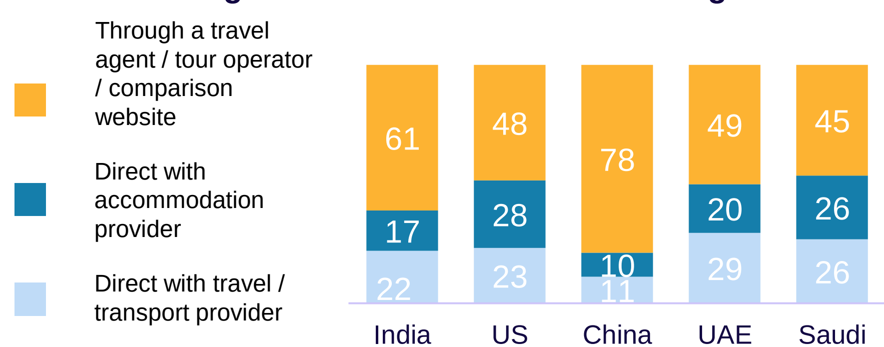


Device used to book package



- Currently India is one of the least likely to book package
- Bookings in India are online dominated, however OTAs in India do tend to have call-centres and staff able to make personal visits to customers, so it is a broader service than the typical fully online only concept
- Bookings from India are typically made on a desktop/laptop contrasting to China where level of online booking is similar but is much more likely to done via smartphone

Booking Accommodation and Travel together



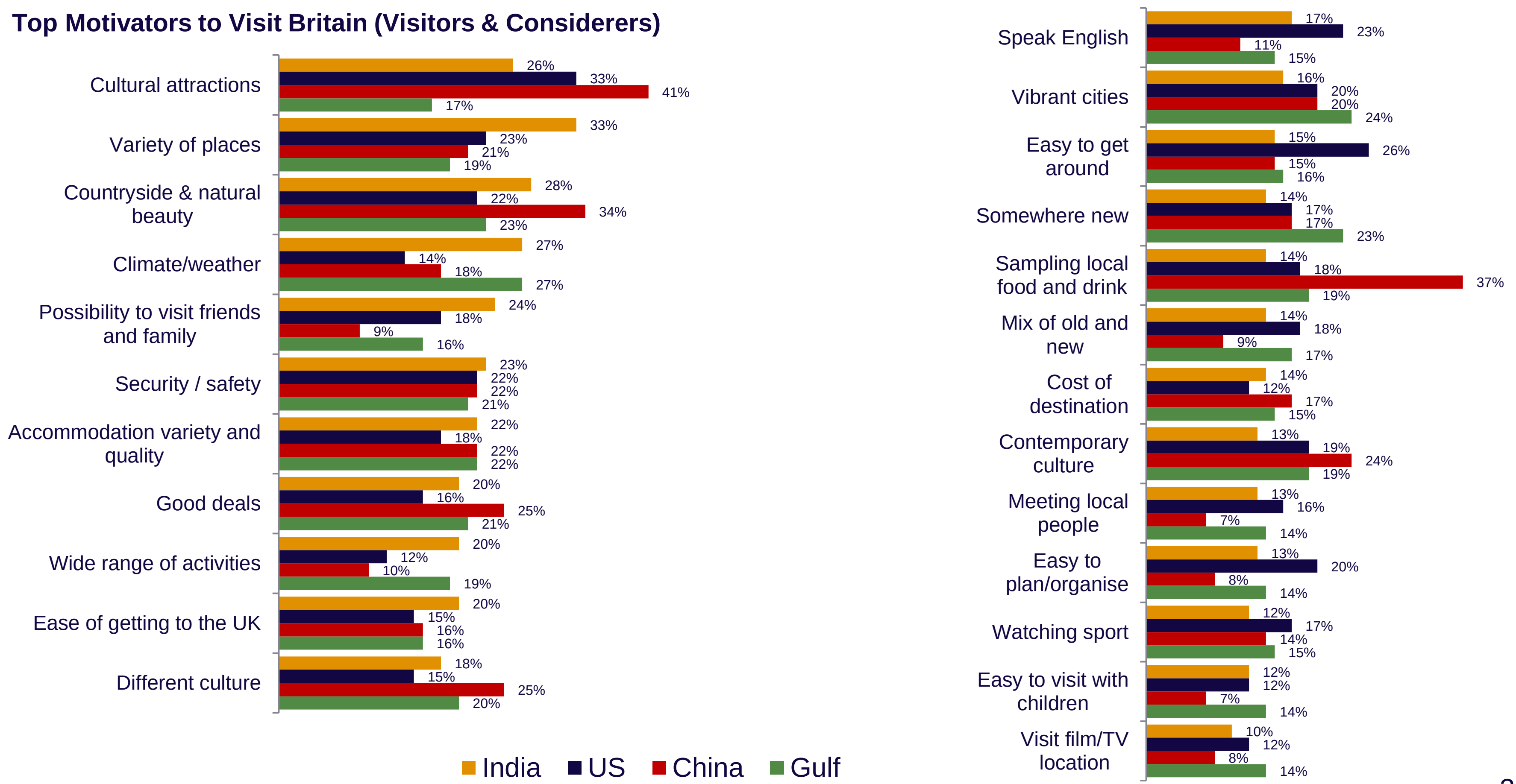
Source: VisitBritain Decisions & Influences Research, 2016

Where possible UAE and Saudi Arabia are shown separately, they are combined when sample size is small

Choice / Motivators to visit Britain: Vary considerably across the focus markets. Interestingly the weather is a motivator for visiting from India and the Gulf

- There are clusters of motivations that are relatively stronger in each of the countries:
  - **India**: Variety, culture. Countryside & family / friend reunion
  - **China**: Natural beauty, culture, local food and drink
  - **US:** Ease of visiting, culture and vibrant cities
  - **Gulf**: vibrancy

Top Motivators to Visit Britain (Visitors & Considerers)

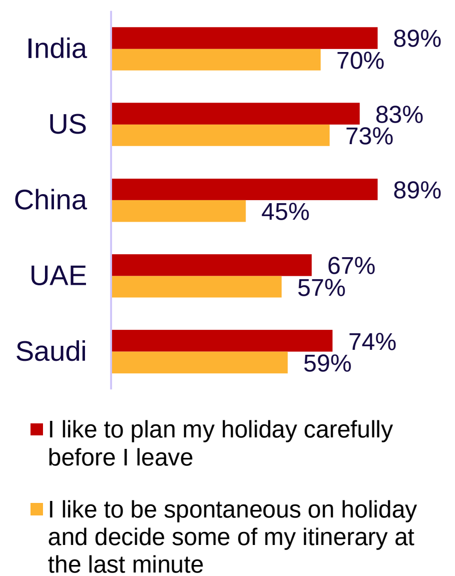


Source: VisitBritain Decisions and Influences Research, 2016

Bookable products: There is a mix of behaviour with activities and transport booked both before and during the trip, reflecting the mixed requirement to both plan well in advance and be spontaneous during a holiday

Itinerary planning vs. spontaneity

- Visitors from India, US and China plan carefully, reflecting perhaps the distance and expense of a holiday to Britain
- However spontaneity still matters in all markets (particularly US) so flexibility in itineraries is still important to build in



Pre-bookable transport / activities

- Indians are willing to book holiday extras before their trip including transport, attractions and particularly guided sightseeing tours.
- This suggest that visitors from India will be interested in, and willing to book, a tour-based package that has pre-set destinations and experiences. Providing expert guides may also be beneficial

Bought or expect to buy **before** visit / Buy or expect to buy **during** visit to Britain

	India	US	China	UAE	Saudi
Airport transfer	60% / 29%	63% / 13%	54% / 29%	50% / 29%	53% / 33%
Theatre/musical/concert	49% / 33%	52% / 25%	48% / 24%	32% / 45%	46% / 27%
Other tourist attractions	57% / 36%	57% / 30%	50% / 40%	34% / 34%	49% / 28%
Flights within UK	64% / 16%	53% / 8%	59% / 24%	58% / 23%	51% / 20%
Guided sightseeing tours in London	58% / 33%	56% / 20%	51% / 30%	51% / 30%	50% / 26%
Guided sightseeing tours outside London	60% / 29%	56% / 18%	54% / 29%	38% / 39%	49% / 29%
Train travel (excluding oyster)	50% / 37%	51% / 22%	44% / 36%	34% / 47%	50% / 30%
Car hire	49% / 43%	52% / 20%	35% / 30%	48% / 42%	50% / 29%
Transport within London	51% / 43%	50% / 33%	38% / 48%	40% / 45%	51% / 39%
Coach travel	50% / 29%	49% / 12%	47% / 42%	42% / 36%	49% / 31%
Sports events	53% / 17%	48% / 14%	48% / 14%	44% / 40%	43% / 18%

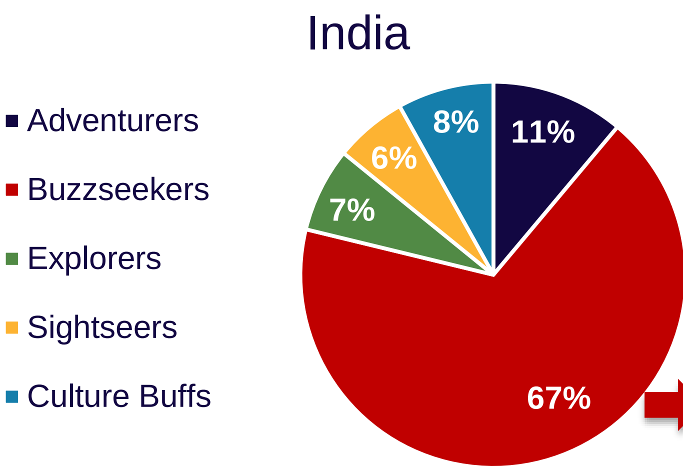
Source: VisitBritain Decisions & Influences Research, 2016

India and the focus countries

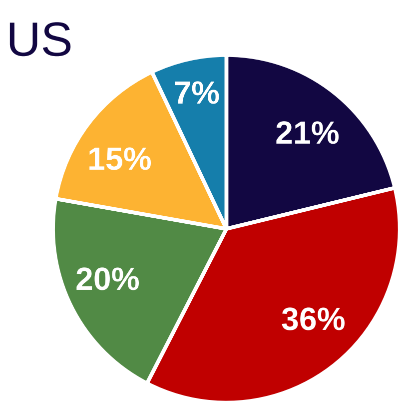
Target Segments

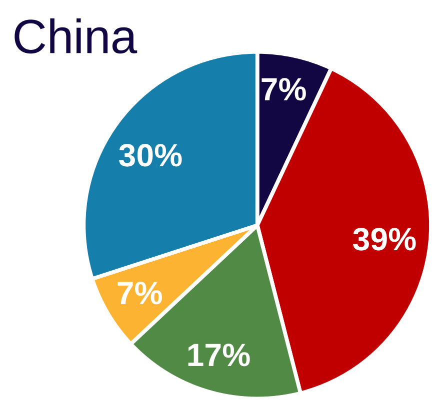
Targeting the most appropriate segments

- Visit Britain have been working on a new segmentation, that provides even greater insight into profiles, travel attitudes and behaviours
- Profiles of all segments are contained in the appendix



As **Buzzseekers** are a large group in India, work is currently in progress to split this segment out further in this market





- The London and Cultural England concept has potential to appeal to many segments depending on the mix of products and experiences included within an itinerary. Buzzseekers are the dominant segment in the target countries included within this research, particularly in India.
- Give the dominance of Buzzseekers in India the segment has been dived into two sub-sectors, details of which will be available in time.

Source: VisitBritain Segmentation

Buzzseekers are a primary opportunity, particularly in India, where the proposition may need to differ for the two sub-segments still in development

Free spirited, spontaneous, Buzzseekers are living in the moment and always looking to make the most of their time. Constantly fueled by the desire for 'more', they are constantly on the search for new ideas, looking to meet new people and engage in new activities that will

AGE

- **Most (64%) 18-34yrs**

18-24 (36%); 25-34 (28%);
35-44 (17%); 45-54 (10%); 55+ (9%)

FAVOURITE TRAVEL ACTIVITIES

- Visiting famous places/iconic sites
- Trying local food & drink specialties

DEFINING ATTITUDES

- Seeking out new experiences
- Always looking for new things to do with one's time
- Taking holidays full of action & excitement
- Happy to pay more for once-in-a lifetime experiences
- See themselves as trendsetters and more popular than others

UNIQUE TRAVEL ACTIVITIES
(versus other segments, but still niche)

- Challenge or action-filled activities
- Hands-on learning activities

GB LIKELY ACCOMMODATION
(unique vs others segments)

- Someone else's home (e.g. Airbnb)
- Tent or caravan
- Alternative accommodation

TRAVEL PLANNING & STYLE

- Friends & family are major influence
- Trusted/famous endorsers influential
- Mobile device natives
- Leave plenty of room for spontaneity

Source: VisitBritain Segmentation

India and the focus countries

Social media deep dive

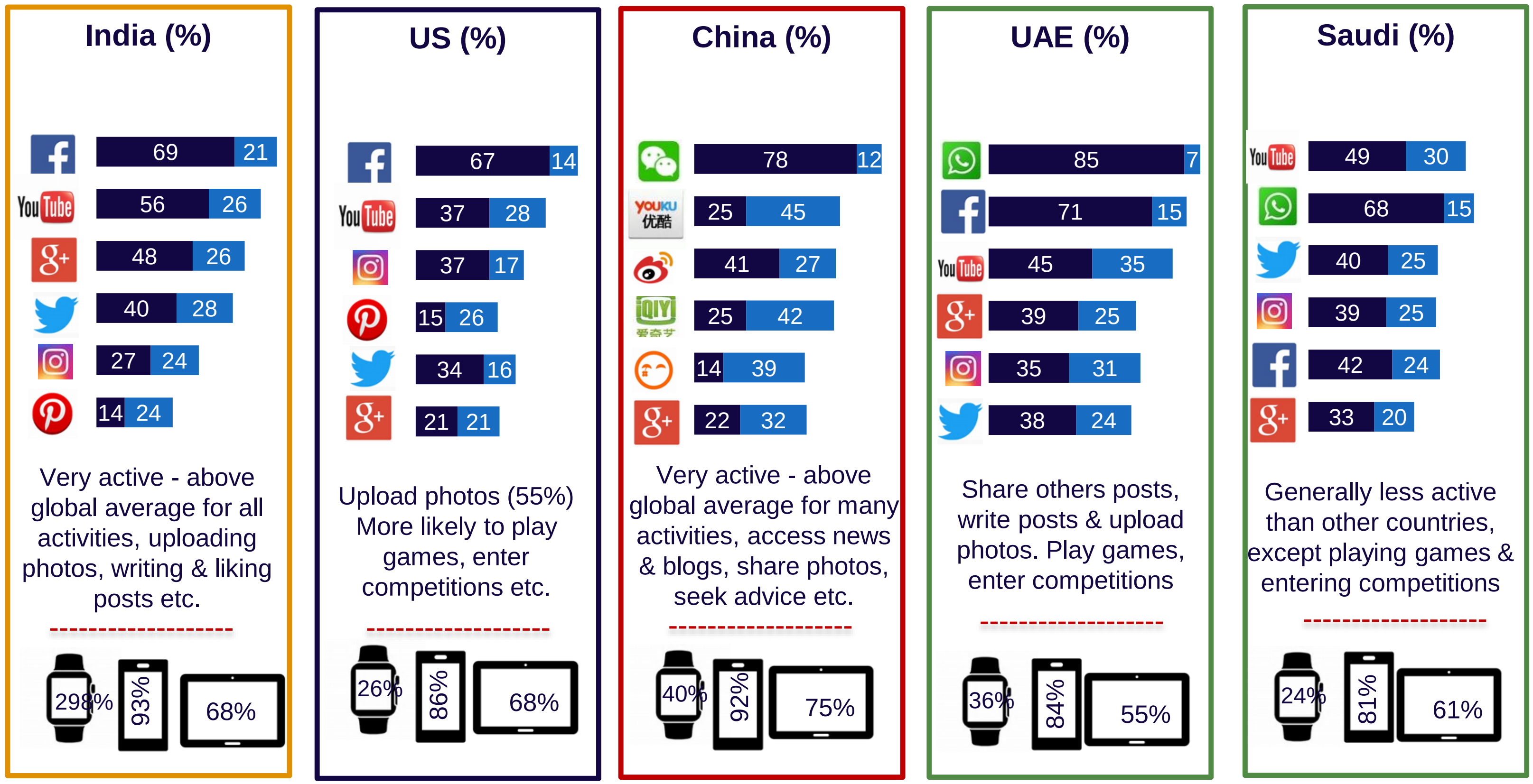
Social media presence is now part of everyday life

Social Media Usage

Daily
Weekly

More local sites evident in China

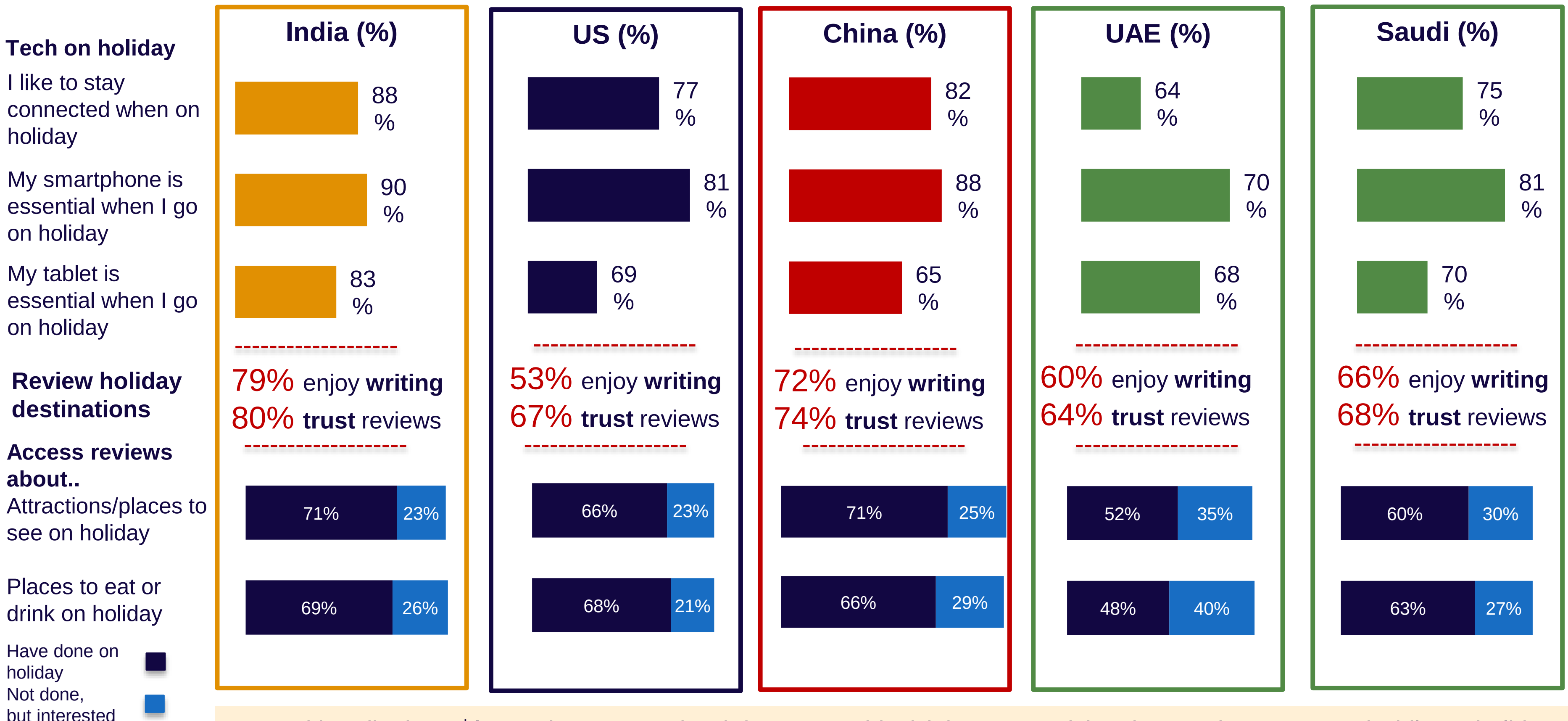
Tech ownership
Smart phone is almost universal. China has high tablet ownership too



- Social Media usage is very high, particularly in UAE and China.
- Whilst overall proportion of people using social media frequently is lower than in some other countries, those that do use are very active both viewing and posting content.
- The prevalence of local social media sites in China presents a challenge in terms of communications for the Discover England Fund project.

Source: Technology and Social Media, 2016

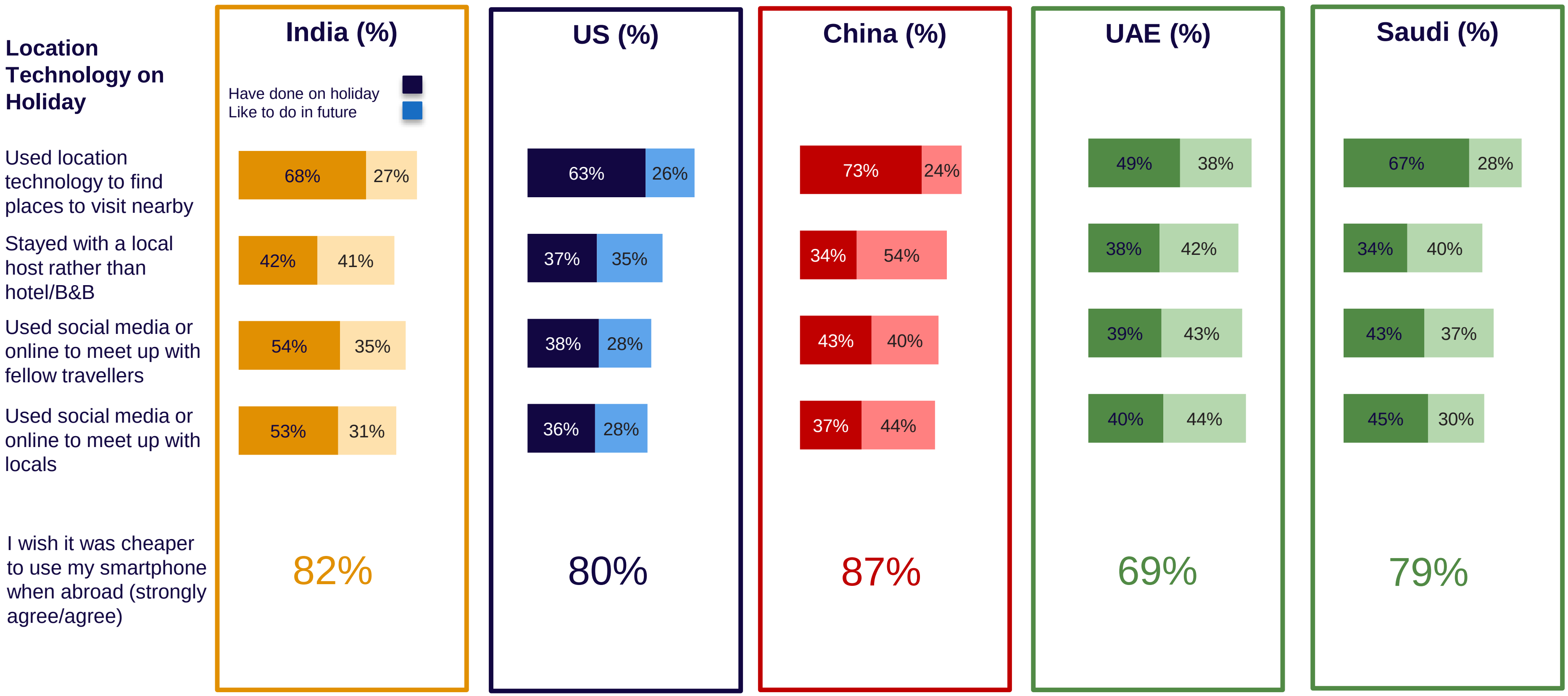
Staying connected is now an accepted part of the holiday experience for the majority. Accessing & writing reviews is far more prevalent in these countries than for Europe



- With India the 3rd larges internet market (after US & China) it is not surprising that staying connected while on holiday is important to most people from India and the other target markets.
- Most notable is the very high incidence of reading and writing reviews. This is clearly an important source of information for people travelling from these countries, India in particular.
- Reviews are widely used to inform decisions on what to do on holiday and it will be important to support this channel of communication whenever possible.

Source: Technology and Social Media, 2016

Using location technology while on holiday is commonplace in all countries, but the cost of use is an issue

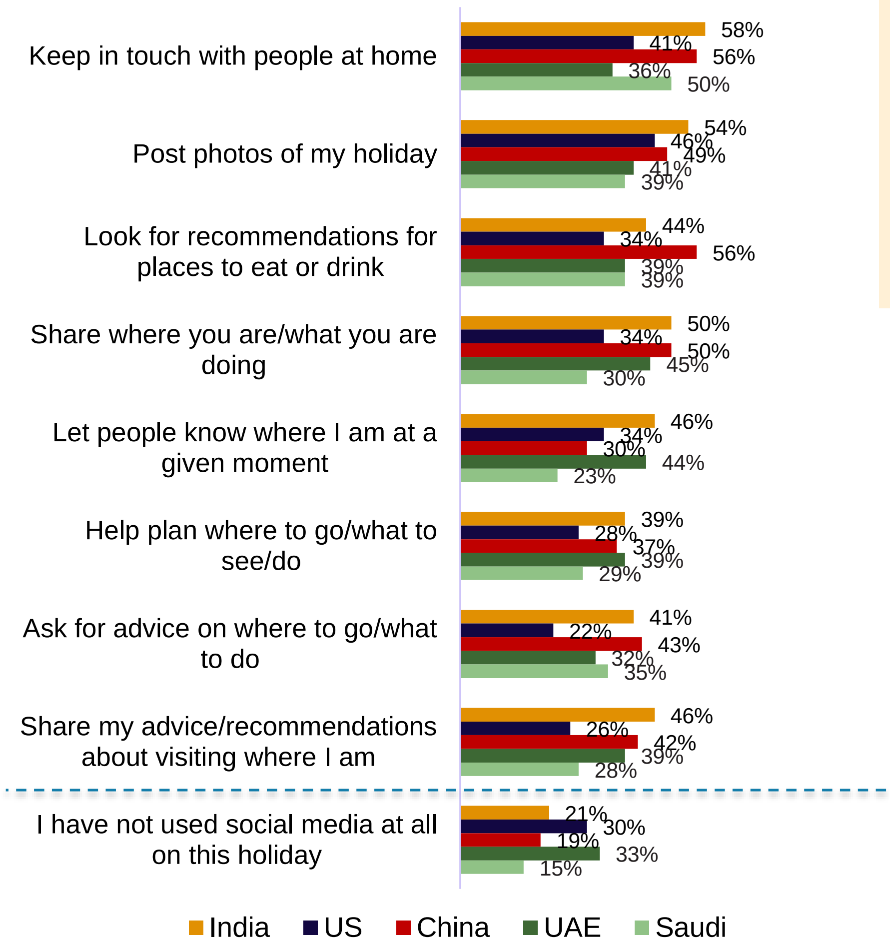


- Location technology is widely used to find places to visit, reflecting the lack of knowledge and/or the wish for spontaneity. This provides an opportunity to make use of location apps to help steer travellers to appropriate attractions
- Travellers from India are the most likely country to use social media and location technology when on holiday
- The cost of mobile is an issue in the focus countries. This suggests free wi-fi provision can be a notable benefit in hotels, attractions and transport

Source: Technology and Social Media, 2016

Use of Social Media on holiday is high

% using social media on holiday in Britain to….



- Use of Social Media whilst on holiday is high across all the focus countries.
- The Chinese use it particularly for recommendations and advice. This reflects their general need for reassurance with their holiday planning and provides an opportunity for providers by maximising their visibility on review sites
- Gulf travellers are more focused on staying in touch with people and sharing what they are doing
- The US travellers are generally the least active on social media

Source: Technology and Social Media, 2016

Summary

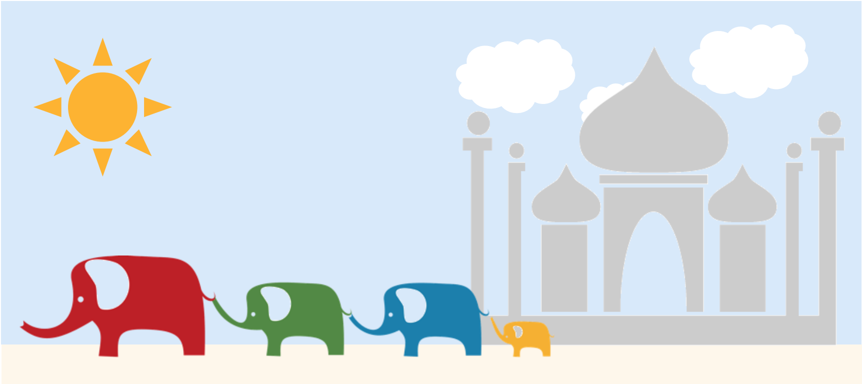
India

Summary - India

Insight	Implications
As with many markets there was a drop in visitor numbers to Britain in 2016, but indications are that 2017 volume will be up significantly. The predicted growth in the middle classes should lead to continued growth in international travel from India	With the right product offer and promotion, the opportunity for growth through London and Cultural England is strong
As we have seen with other long haul markets the lead time between thinking about the trip and actually booking is quite considerable. Initial planning starts more than 6 months in advance for almost half of all travellers from India. However, perhaps because of Visa issues two-thirds book within the two months before travelling	This implies that extended marketing activity will be needed to London and Cultural England top of mind from initial planning through to actual booking
Whilst London is the main gateway, Birmingham also provides opportunity to offer open-jaw itineraries for visitors from India. It is noted though that many holiday visitors from India stay for two weeks or more, potentially combining holiday with visiting friends and relatives	This may impact the overall package, potentially requiring an 'in England' itinerary that can be booked separately or fir for different dates to the flights
There is higher propensity of visitors from India to use private transport (coaches and taxi)	This fits well with the London and Cultural England offer and itineraries for the Indian market could be successful with either public or private transport options
Whilst London is the main gateway, Birmingham is also popular	This may provide opportunity to offer open-jaw itineraries to a receptive audience of visitors from India
Visitors from India tend to book more aspects of their trip in advance	This suggests that fully bookable itineraries will be well received by the trade and by travellers

Summary - India

Insight	Implications
Visitors from India have wide interests including both urban and rural destinations	A good fit to the London and Cultural England proposition
There is high interest in dining in restaurants	This suggests that food experiences should be built into the itinerary and the marketing content. Care must be taken though that these are restaurants rather than ‘pubs that offer food’. Other themes that may resonate with the Indian traveller are around films and/or sport.
India travellers appear to be price sensitive and actively seek out price information from multiple source	It will be important to ensure packages are visible and ideally consistent in pricing across trade partners
Booking channels are predominantly online and reviews and recommendations on and off-line are important in the decision-making process. This reflects the high tech ownership and social media activity in India	With a fragmented travel trade it will be important to ensure the right trade partners are selected who have the online presence and are expert in the more premium sector. A strong social media presence and activity on review sites should help strengthen awareness and consideration of the London and Partners offer



Appendix: City Deep Dives

Newcastle
Birmingham
Manchester
London

Summary insights on overseas visitors to Newcastle upon Tyne

Headline stats: Overseas visits, spend and nights to **Newcastle Upon Tyne**

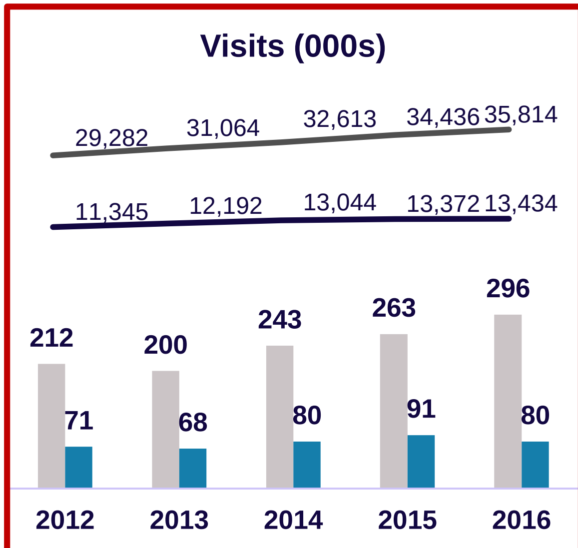
Newcastle attracts 268,000 visits annually, 84,000 of which are holiday visits.

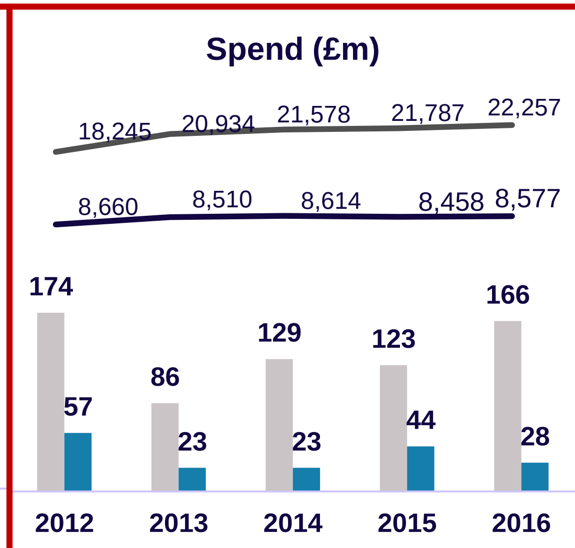
Visits, Spend and Nights to Newcastle Upon Tyne 3 year average for 2014-16

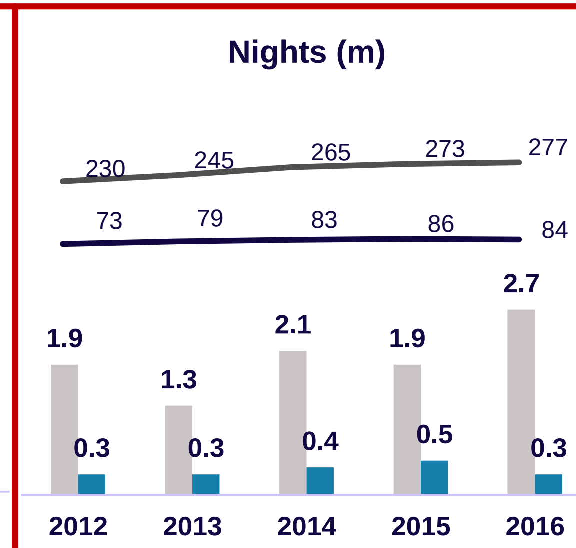
	Visits (000s)	Spend (£m)	Nights (m)
Newcastle Total	268	139	2.2
Newcastle Holiday	84	32	0.4

Visits, Spend and Nights 5 Year Trend

Newcastle Upon Tyne Total
Newcastle Upon Tyne Holiday
UK Total
UK Holiday





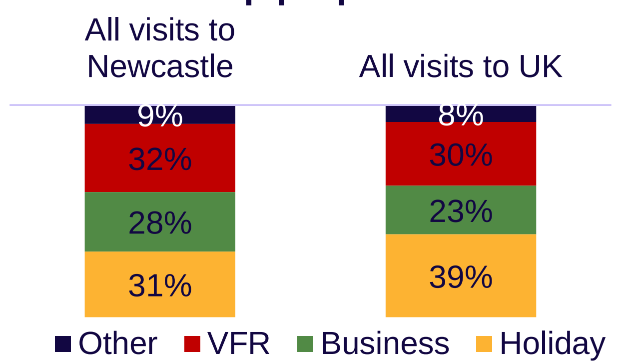


Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

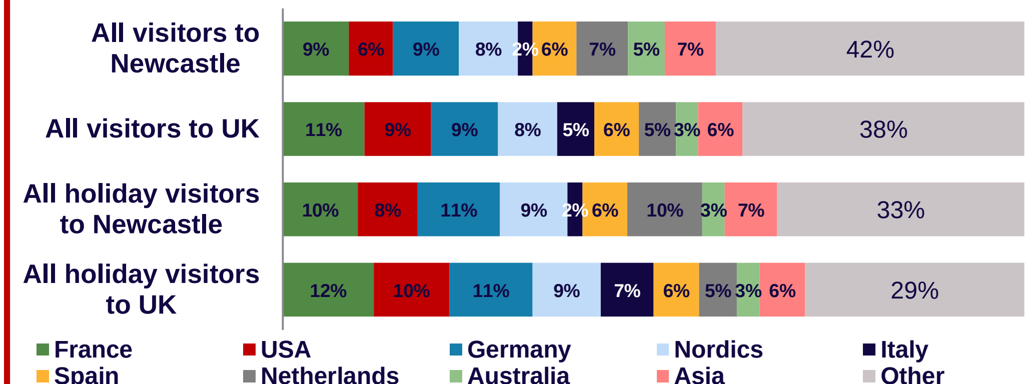
Trip purpose and source markets: All visitors and holiday visitors

Visiting friends or relatives is the most common trip purpose for visitors to Newcastle, followed closely by holiday. There are a greater number of business visits to Newcastle compared to the UK average. Holiday visitors to Newcastle are most likely to be from Ireland and are more likely than average to visit countryside/ villages and coasts or beaches.

Trip purpose



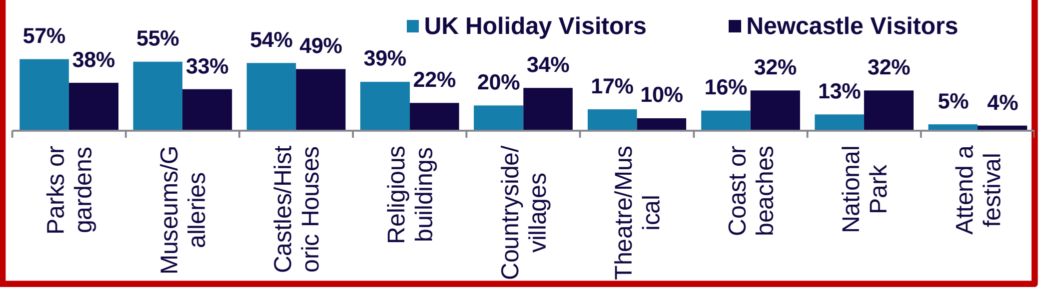
Source Markets



Top 3 source markets for holiday visitors to Newcastle (ranked by visits)

Ireland		Germany		France	
Visit (000s)	11.3	Visit (000s)	9.6	Visit (000s)	8.7
Spend (£m)	£11.1	Spend (£m)	£8.6	Spend (£m)	£7.7

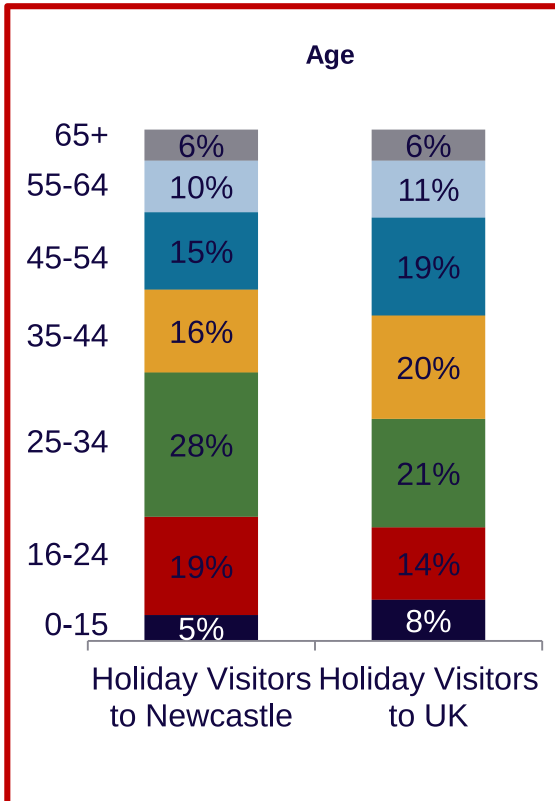
Activities conducted by holiday visitors to Newcastle

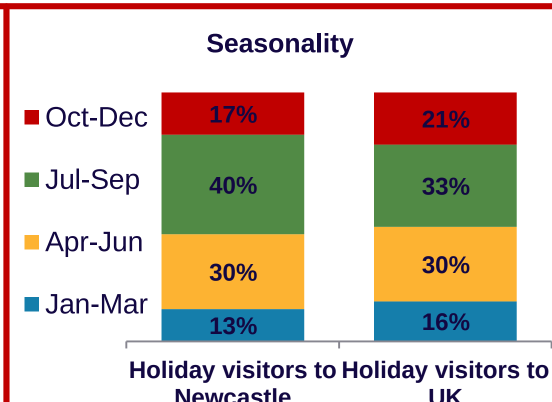


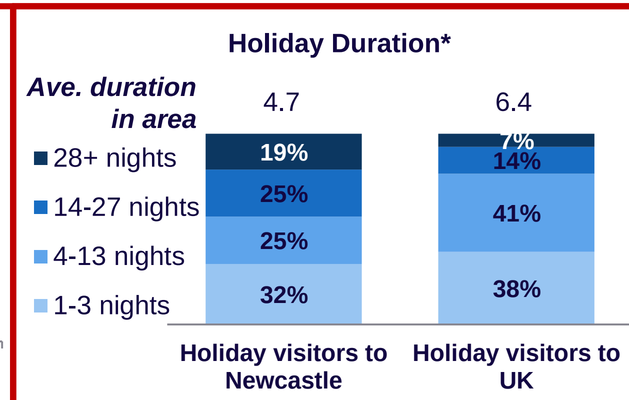
Source: IPS 2014-2016, Activities from IPS 2016 only

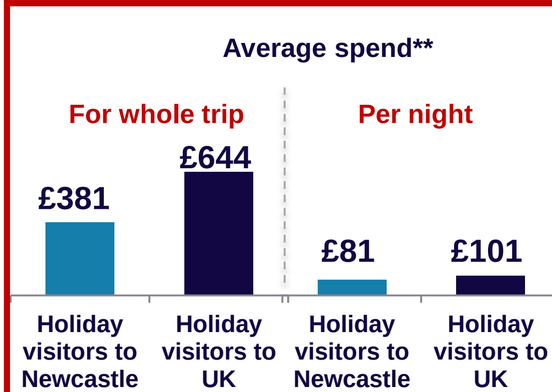
Demographics and holiday characteristics: Holiday visitors

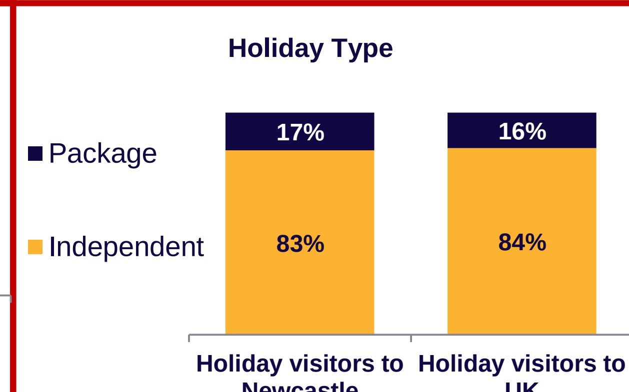
Holiday visitors to Newcastle are more likely than the UK average to be aged 25-34, visiting in the peak summer season and visiting for a longer duration. Holiday visitors spend 4.7 nights on average in Newcastle.







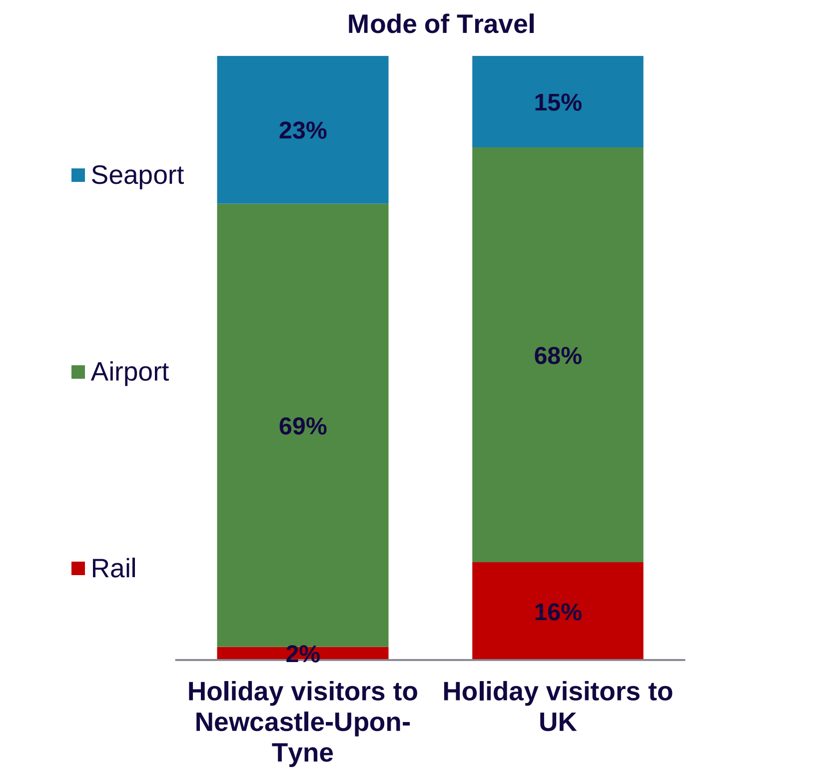


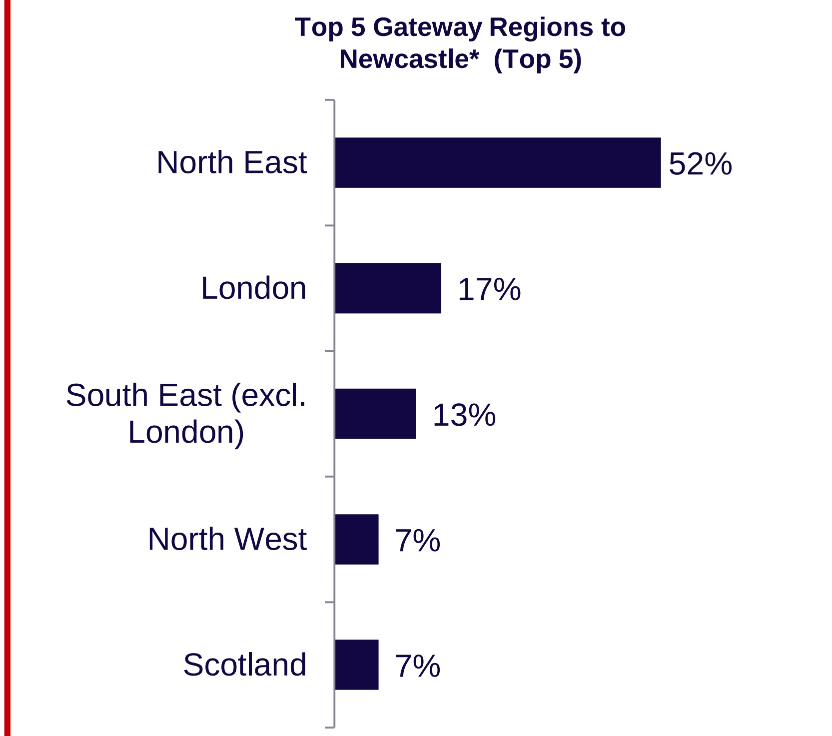


Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

The most common mode of travel for holiday visitors to Newcastle is airport via a North East gateway. Nearly a quarter of holiday visitors arrive in Newcastle via seaport, higher than the UK average.





Source: IPS 2014-2016 . *Gateway Regions are defined in the introduction of this report
Base sizes too small to report day visits data

Summary insights on overseas visitors to Birmingham

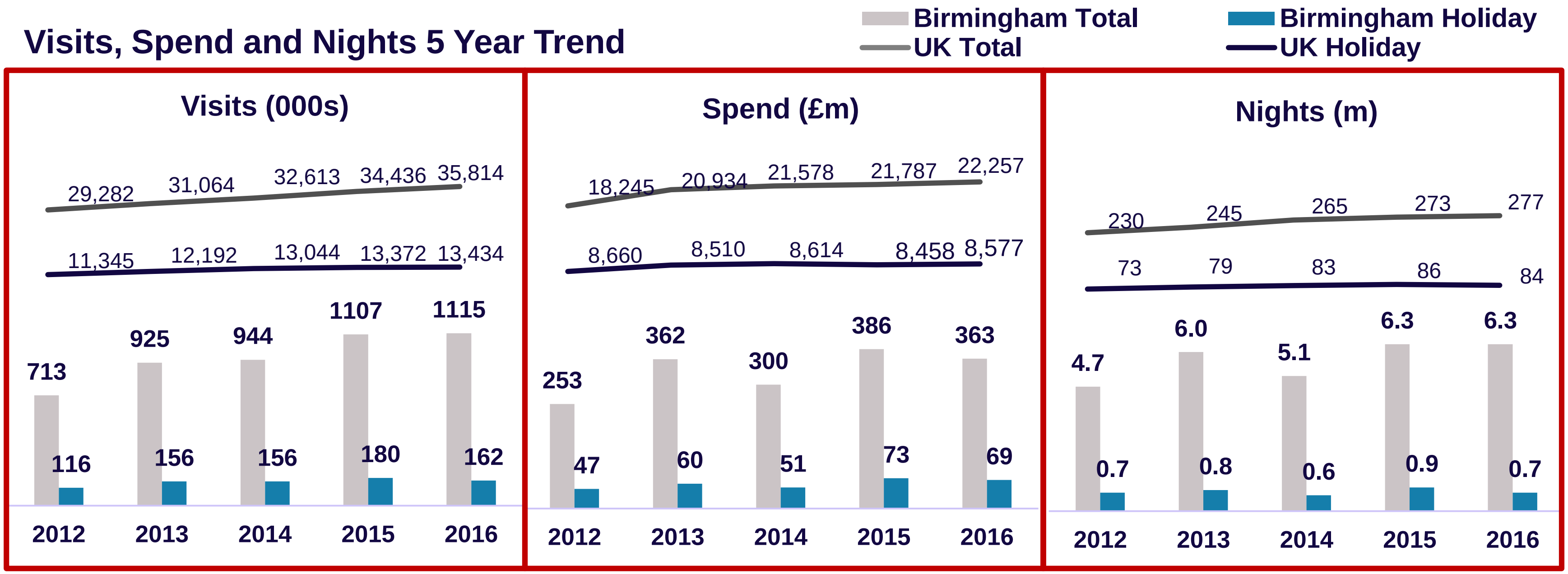
Headline stats: Overseas visits, spend and nights to **Birmingham**

Overseas visits to Birmingham have increased every year for the last 5 years. Holiday visits, spend and nights are significantly higher than in 2012 although lower than in 2015.

Visits, Spend and Nights to Birmingham 3 year average for 2014-16

	Visits (000s)	Spend (£m)	Nights (m)
Birmingham Total	1,055	349	5.9
Birmingham Holiday	166	64	0.8

Visits, Spend and Nights 5 Year Trend

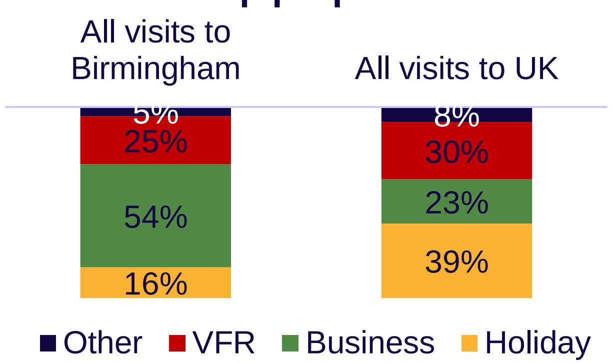


Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

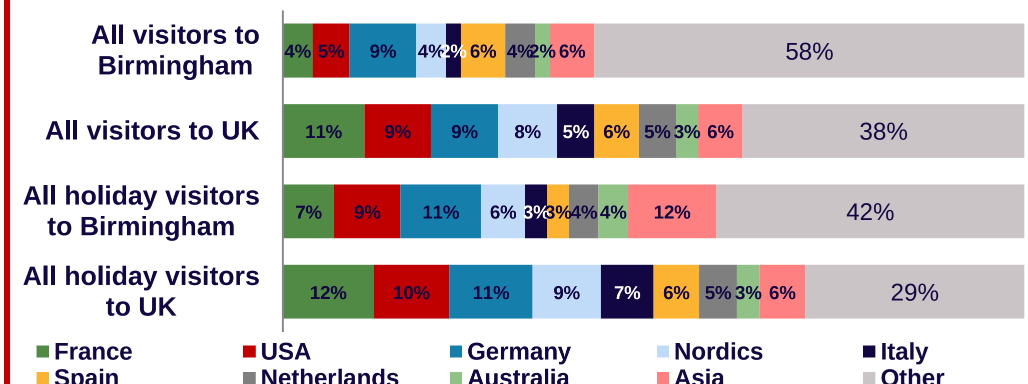
Trip purpose and source markets: All visitors and holiday visitors

Over half of overseas visits to Birmingham are for business purposes (more than twice the UK average), only 1 in 6 for a holiday. Birmingham is more likely than average to attract holiday visitors from Ireland and Asia. Holiday visitors are less likely than UK visitors on the whole to engage in cultural activities although visiting parks and gardens and museums are the most common activity.

Trip purpose



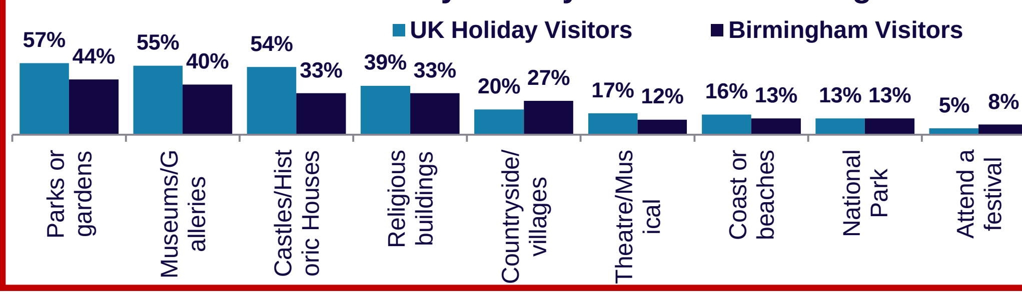
Source Markets



Top 3 source markets for holiday visitors to Birmingham (ranked by visits)

Ireland		Germany		USA	
Visit (000s)	30.4	Visit (000s)	17.6	Visit (000s)	14.6
Spend (£m)	£28.3	Spend (£m)	£23.7	Spend (£m)	£23.6

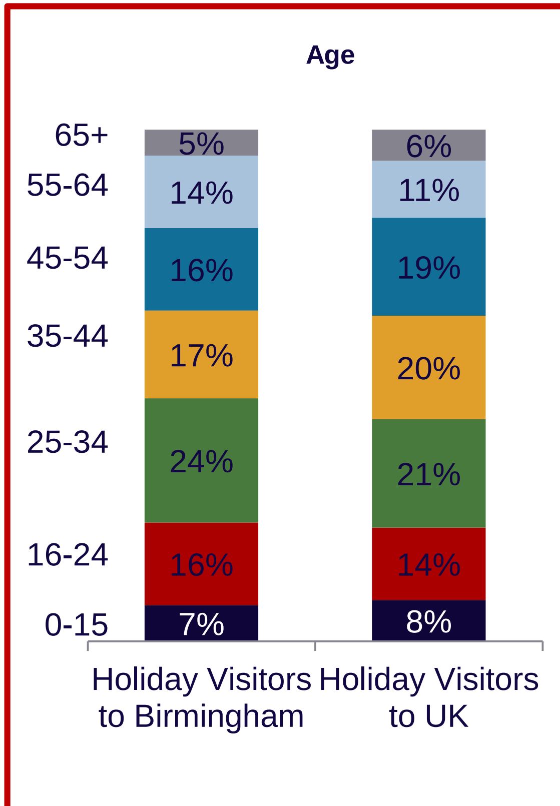
Activities conducted by holiday visitors to Birmingham

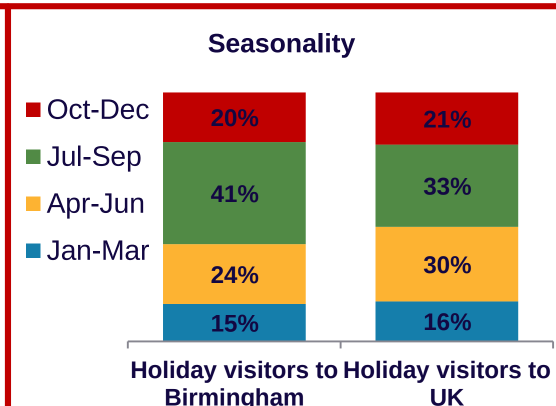


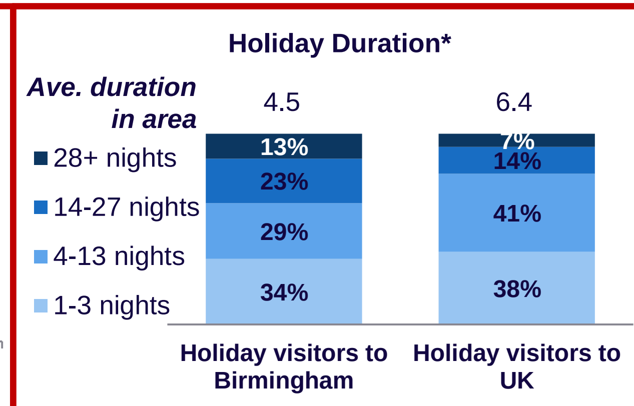
Source: IPS 2014-2016, Activities from IPS 2016 only

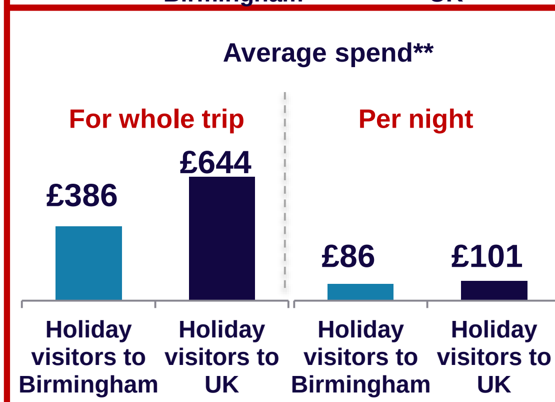
Demographics and holiday characteristics: Holiday visitors

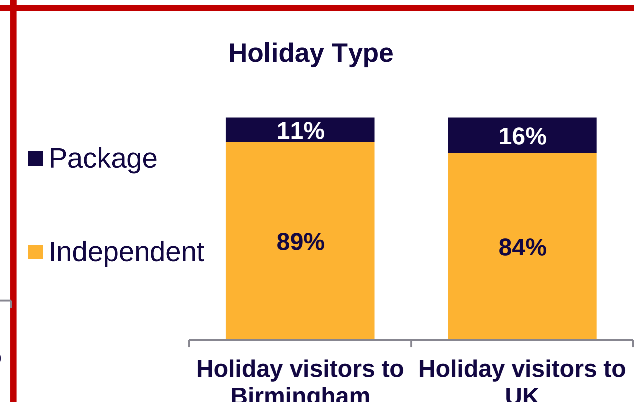
Overseas holiday visits to Birmingham are most likely to take place in July to September and to be booked independently. On average holiday visitors stay 4.5 nights in Birmingham.







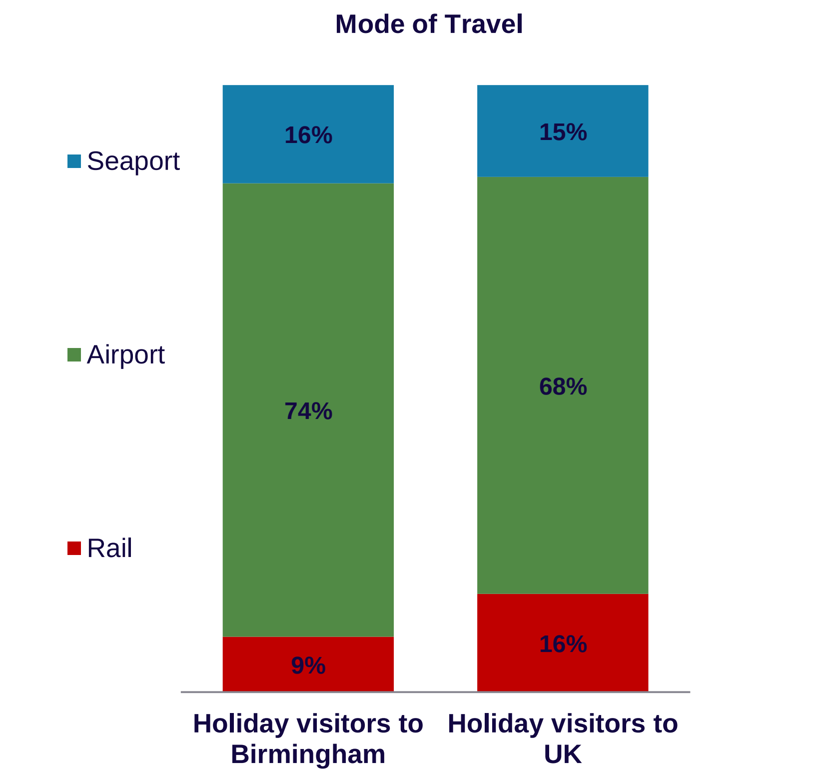


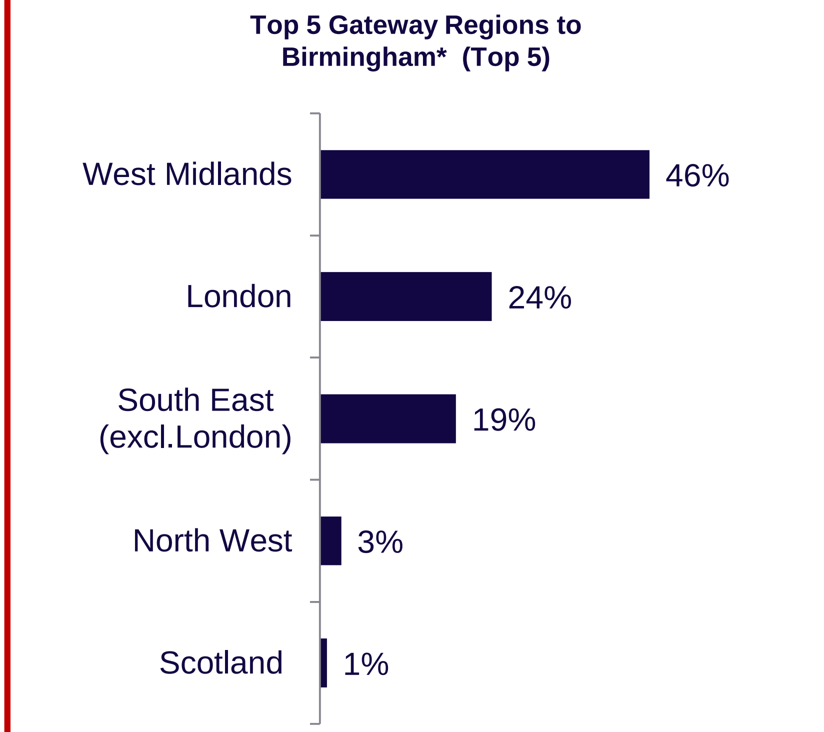


Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Airport is the most common arrival mode for holiday visitors to Birmingham, and the West Midlands the top gateway region. Around 1 in 4 arrive via London, 1 in 5 via the South East.





Source: IPS 2014-2016 . *Gateway Regions are defined in the introduction of this report
Base sizes too small to report day visits data

Summary insights on overseas visitors to Manchester

Headline stats: Overseas visits, spend and nights to **Manchester**

Manchester attracts 1.1 million overseas visits annually, 256,000 of which are for a holiday. Overall and holiday visit numbers, spend and nights-stayed increased significantly in 2015. Overall spend and nights-stayed declined overall in 2016, but holiday spend and nights stayed remains steady.

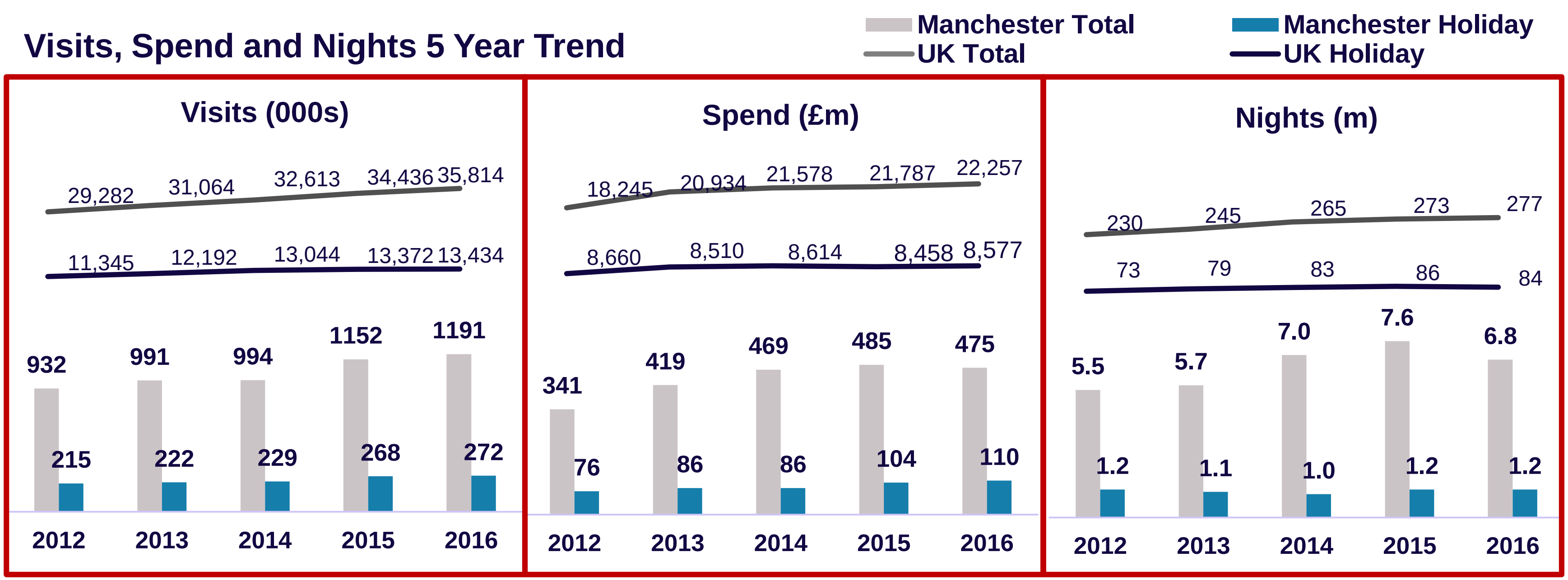
Visits, Spend and Nights to Manchester 3 year average for 2014-16*

Visits (000s)	
Manchester Total	1,112
Manchester Holiday	256

Spend (£m)	
Manchester Total	467
Manchester Holiday	100

Nights (m)	
Manchester Total	7.1
Manchester Holiday	1.1

Visits, Spend and Nights 5 Year Trend

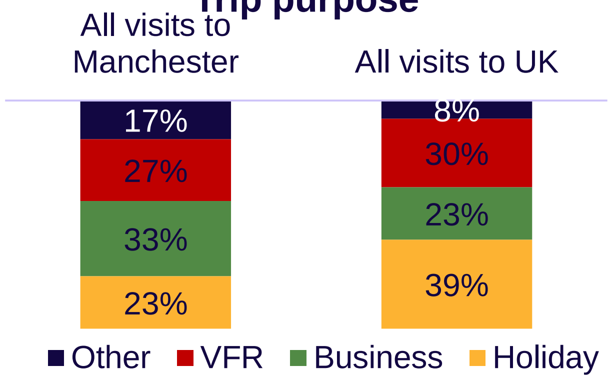


Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

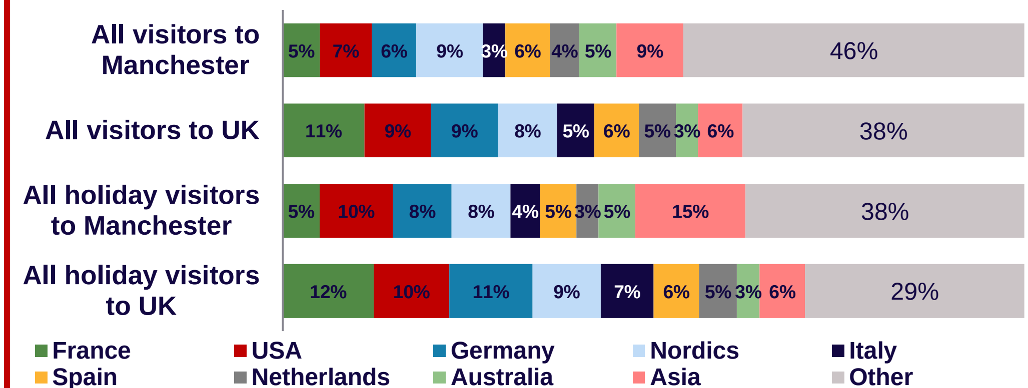
Trip purpose and source markets: All visitors and holiday visitors

Visitors to Manchester are more likely than visitors to the UK to be visiting for Business or 'Other' purposes. The highest number of holiday visitors come from Ireland. Manchester attracts a lower percentage of visitors from Mainland Europe than the UK in general. Holiday visitors to Manchester are less likely than average to visit cultural venues, but more likely to visit countryside/villages, the coast and national parks

Trip purpose



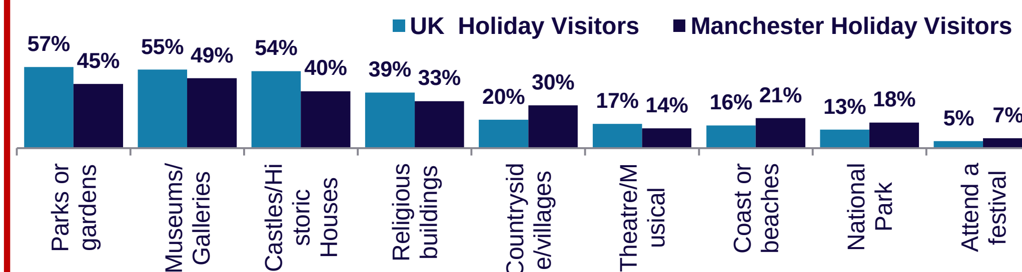
Source Markets



Top 3 source markets for holiday visitors to Manchester (ranked by visits)

	Ireland		USA		Germany
Visit (000s)	30.7	Visit (000s)	24.5	Visit (000s)	20.4
Spend (£m)	£41.6	Spend (£m)	£41.3	Spend (£m)	£38.1

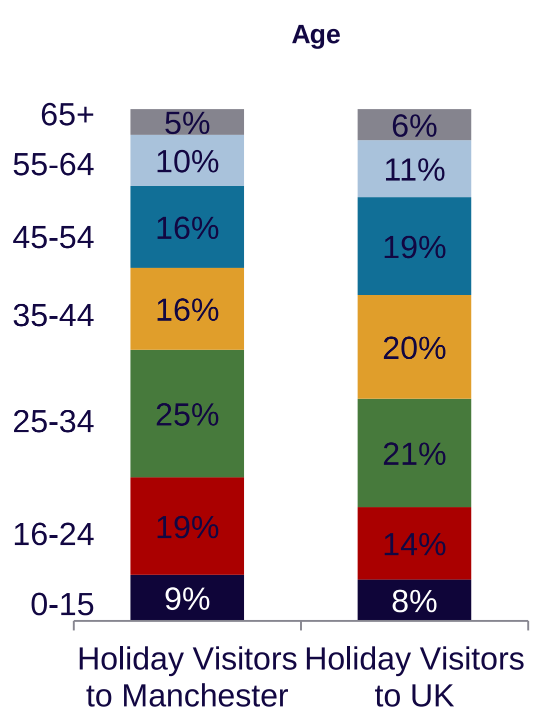
Activities conducted by holiday visitors to Manchester

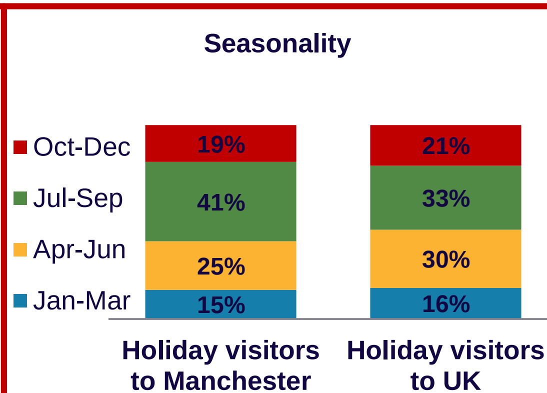


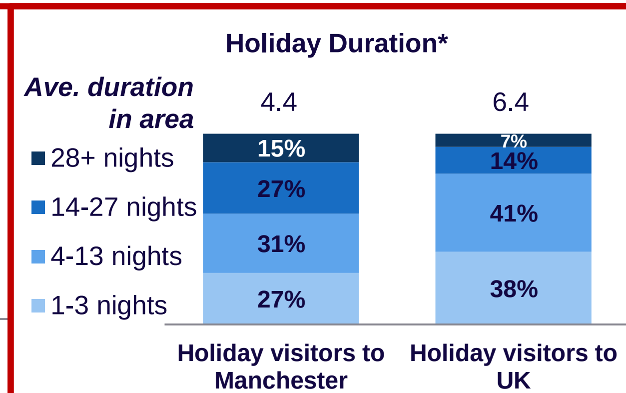
Source: IPS 2014-2016, Activities from IPS 2016 only

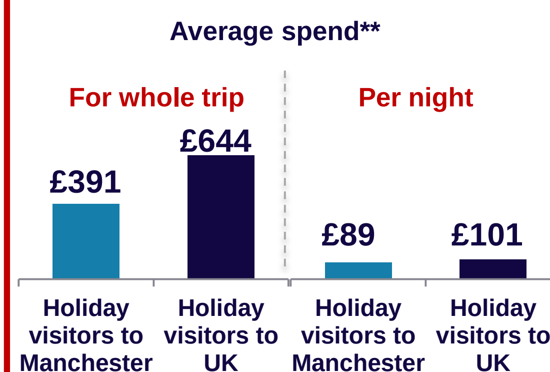
Demographics and holiday characteristics: Holiday visitors

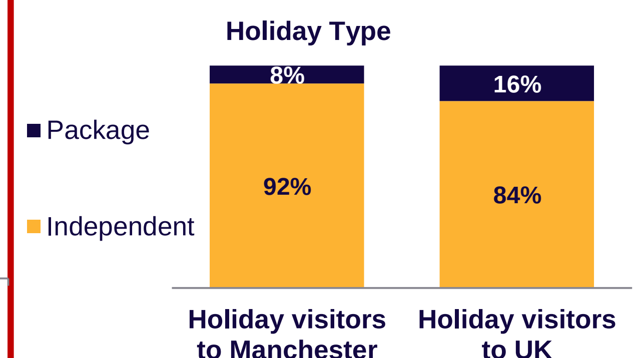
Holiday visitors to Manchester are more likely than the UK average to be aged 16-34, staying in the peak summer season and to have booked their holiday independently. On average holiday visitors to Manchester spend 4.4 nights in the City.







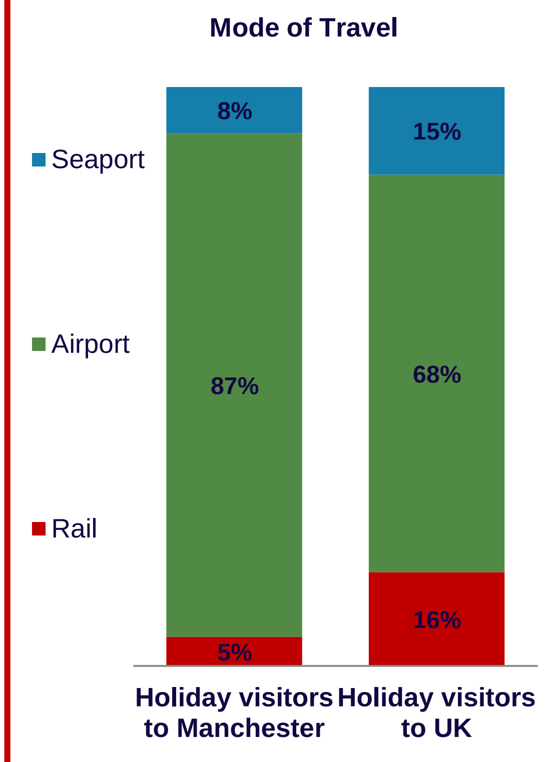


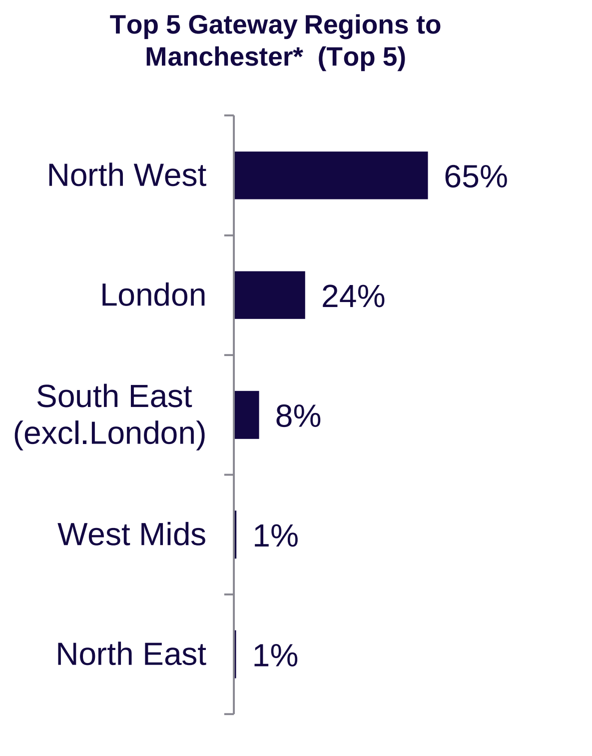


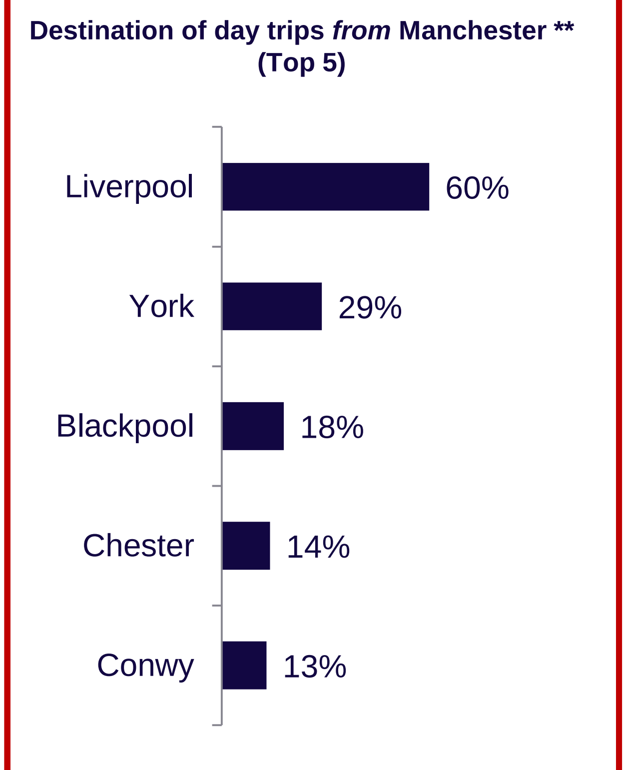
Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

The vast majority of Holiday visitors to Manchester travelled to the UK via airport, and via a North West gateway. Notably, nearly a third of holiday visitors to Manchester used a London or South East gateway. The most popular day trip destinations from Manchester are Liverpool, York and Blackpool.







Source: IPS 2014-2016 . *'Destination of day trips *from* Manchester'' = IPS 2016 only. *Gateway Regions are defined in the introduction of this report

Discover England: summary insights on overseas visitors to London

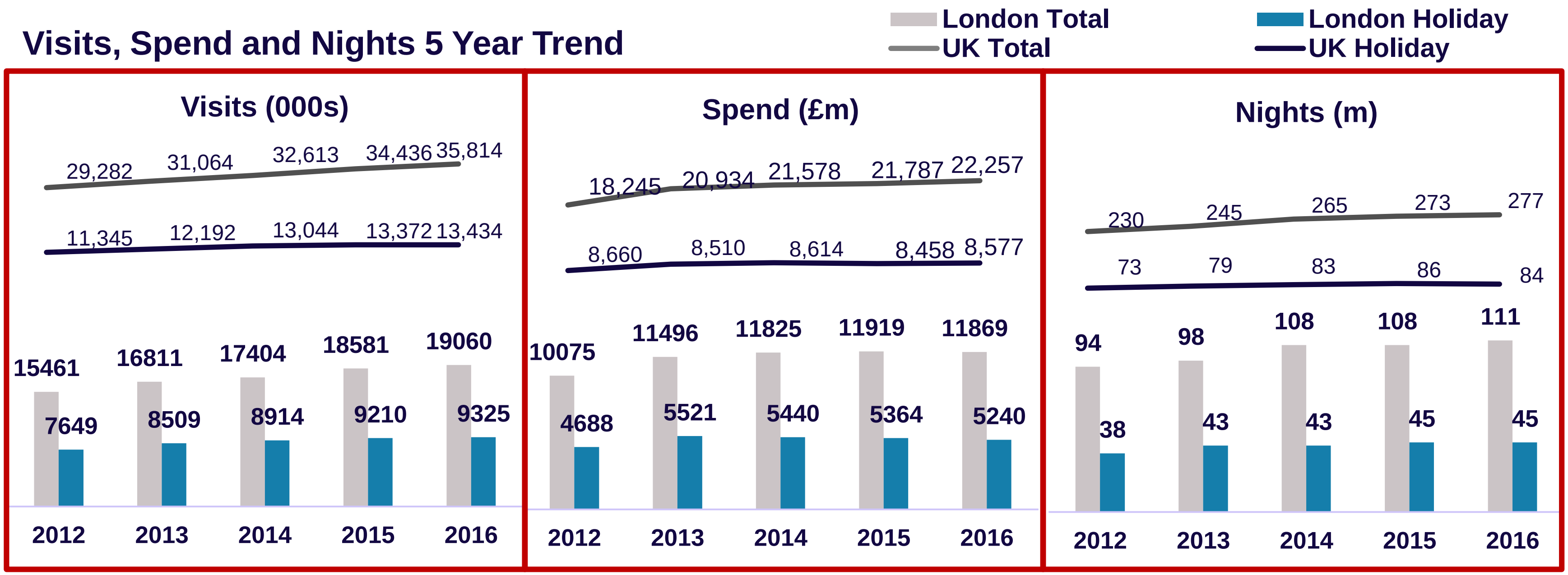
Headline stats: Overseas visits, spend and nights to **London**

London attracts on average of 18.3 million visits annually, around half of which are holiday visits. Total and holiday visits to London have been steadily increasing since 2012. Overall spend has remained fairly constant.

Visits, Spend and Nights to London 3 year average for 2014-16

	Visits (000s)	Spend (£m)	Nights (m)
London Total	18,348	11,871	109
London Holiday	9,150	5,348	44

Visits, Spend and Nights 5 Year Trend

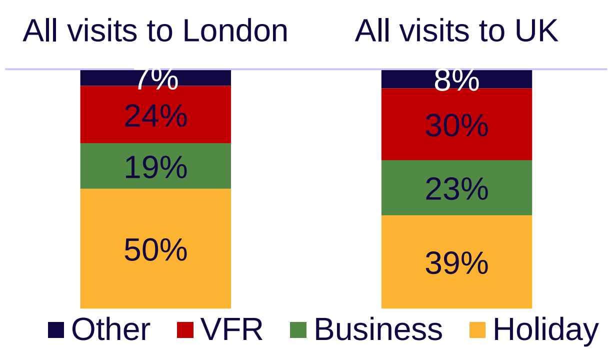


Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

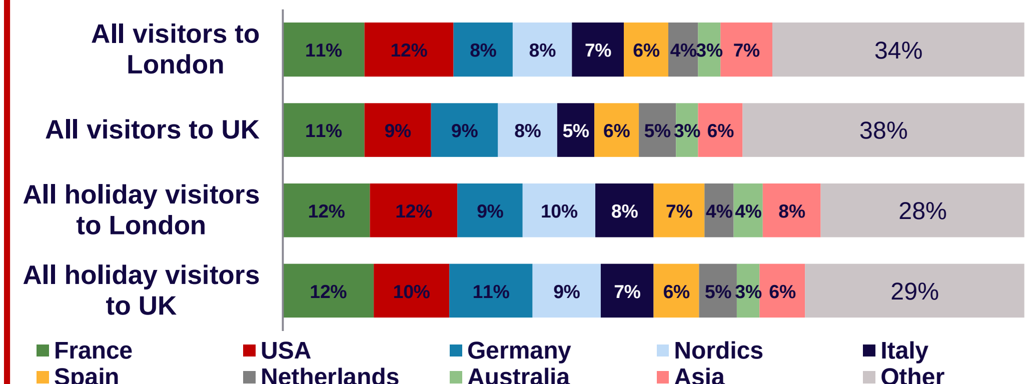
Trip purpose and source markets: All visitors and holiday visitors

Half of all visits to London are for a holiday, with visitors coming from a range of source markets. Holiday visitors to London are more likely than the UK average to visit parks or gardens and museums/ galleries and are less likely than the UK average to conduct rural activities such as visiting the coast, countryside or National Parks.

Trip purpose



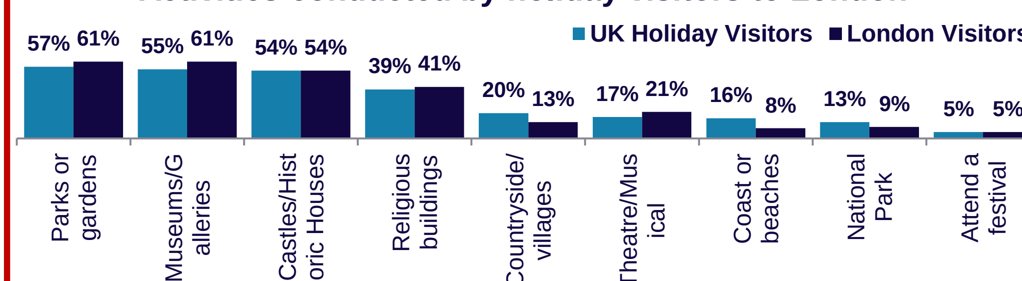
Source Markets



Top 3 source markets for holiday visitors to London (ranked by visits)

	France		USA		Nordics
Visit (000s)	1071	Visit (000s)	1053	Visit (000s)	900
Spend (£m)	£597	Spend (£m)	£871	Spend (£m)	£712

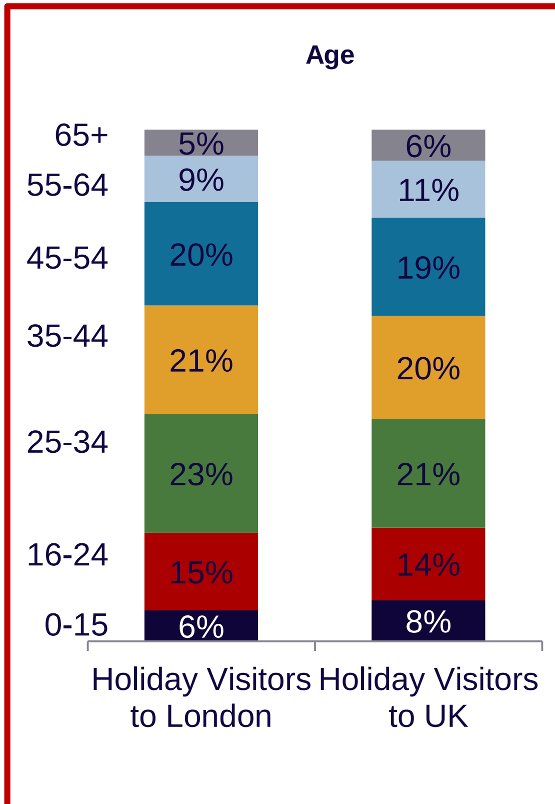
Activities conducted by holiday visitors to London

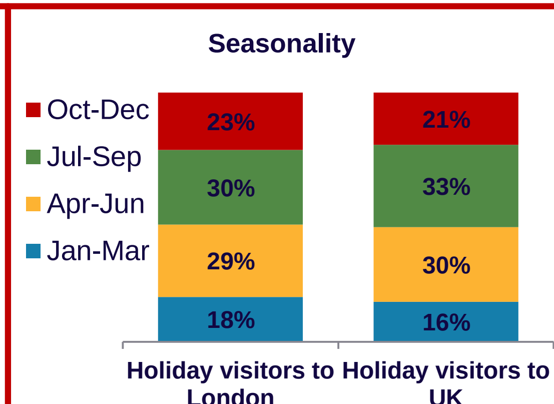


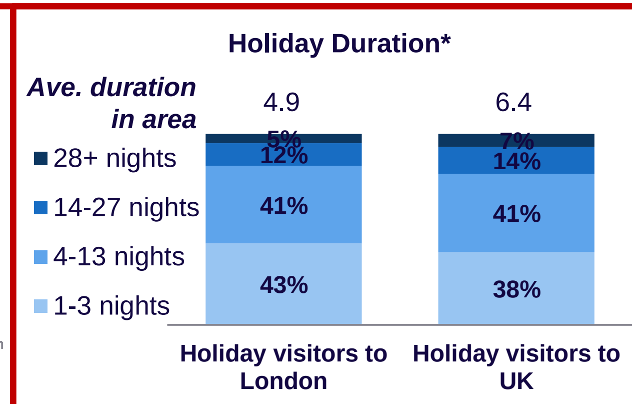
Source: IPS 2014-2016, Activities from IPS 2016 only

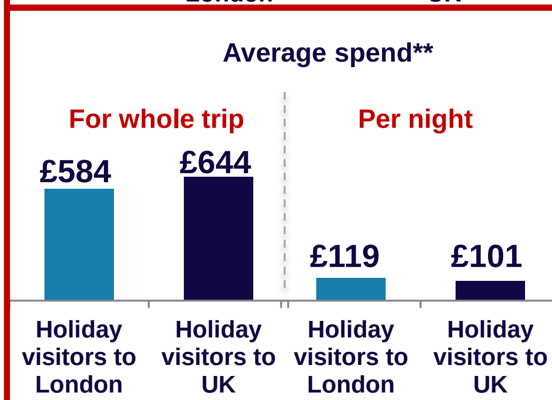
Demographics and holiday characteristics: Holiday visitors

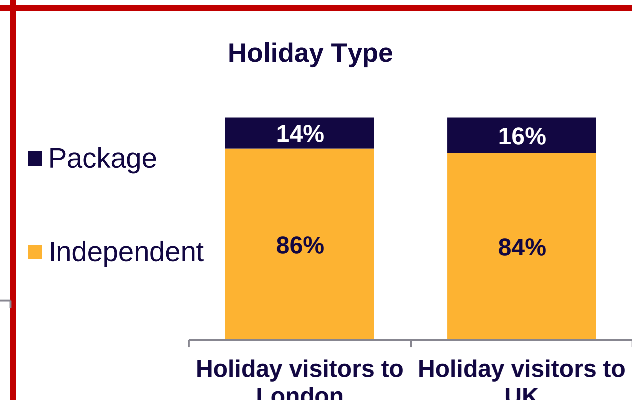
25-34 year olds make up the largest age group of holiday visitors to London. Although most likely to visit in July to September, a similar proportion visit in April to June. Holiday visitors to London tend to book their trip independently and stay 4.9 nights on average. Average spend per trip and per night is greater than the UK average.







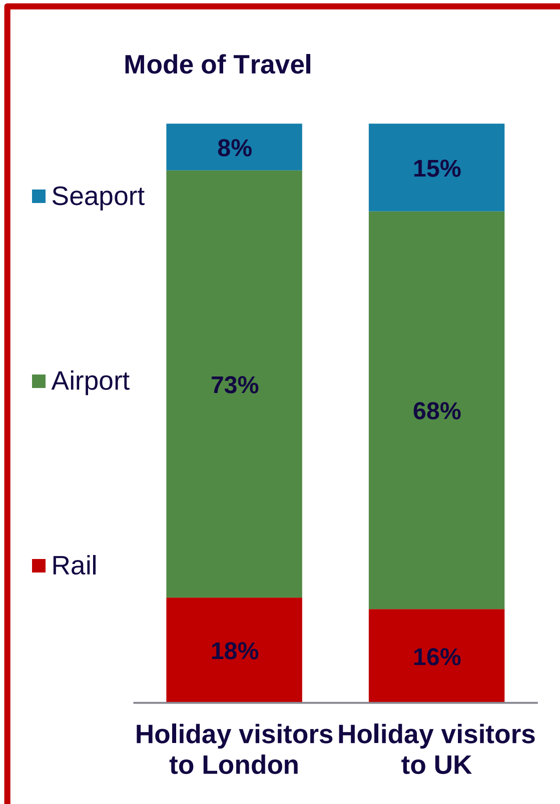


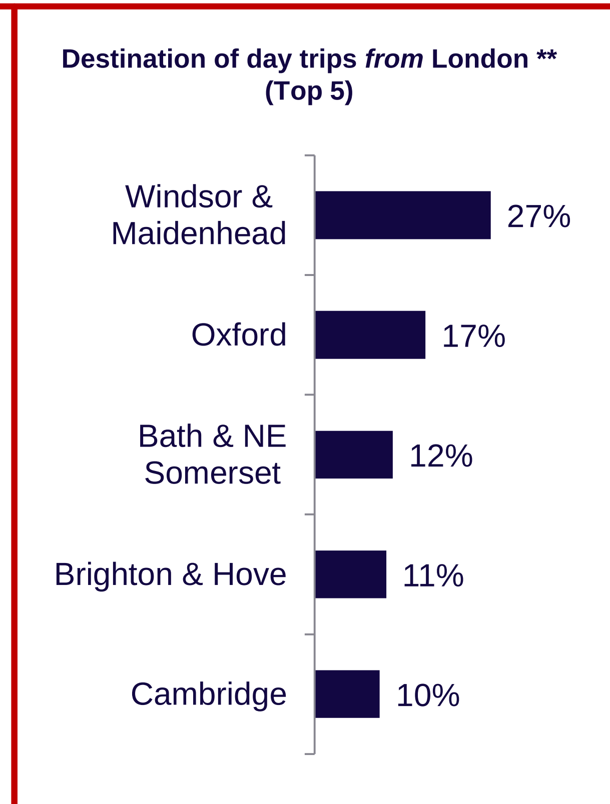


Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Airport is the most common mode of travel for holiday visitors to London and is higher than the UK average. Unsurprisingly, London is the top gateway region, although for 1 in 4 it is the South East. Windsor & Maidenhead is the most popular day-trip destination, followed by Oxford.





Source: IPS 2014-2016 . *'Destination of day trips *from* London'' = IPS 2016 only. *Gateway Regions are defined in the introduction of this report

Appendix

Segment Summary & Profiles

Buzzseekers are the biggest sector, but others provide opportunity too

	Explorers 	Adventurers 	Culture Buffs 	Buzzseekers 	Sightseers 
	• 55+ • Australia, Germany, France	• 45+	• 25 - 54 • China	• 18 - 34 • Australia, Germany, France India, USA, Netherlands, Australia	• 55+ • USA
	• Comfortable with who they are • Slower relaxed pace • Like to go places that don't attract tourists	• Comfortable with who they are • Outdoors in natural landscapes • Off the beaten track • Seek out new experiences	• Care about the image they project • Travel is reward for hard work • Demand worlds leading sights	• Seek new experiences • Action & excitement • Pay for once-in-a-lifetime • Trendsetters	• Cities • Creatures of habit • Sensible
	• Local food & drink • Rural life & scenery • Famous/iconic places • Outdoor leisure pursuits • Visiting parks & gardens	• Local food & drink • Rural life & scenery • Famous/iconic places • History & heritage • Outdoor leisure pursuits	• Local food & drink • Famous/iconic places	• Famous/iconic places • Local food & drink • Challenge/action filled • Hands on learning	• Local food & drink • Famous/iconic places • Experiencing city life
	• B&B/Self-catering	• B&B	• Mainstream hotels/B&B	• Airbnb, camp, alternative accommodation	• Mainstream hotel only
	• Friends & family • Movies, books, magazines & travel agents	• Friends & family • Websites	• Friends & family • Travel in groups or families	• Friends & family • Trusted influential • Mobile- natives • Spontaneous	• Friends & family • Websites & travel agents • Deal-seekers
	• Mature Experience Seekers • Outdoor Enthusiast	• Outdoor Enthusiast • Mature Experience Seekers	• Lifestyle Travellers • Cultural Adventurers	• Young Active Explorers • Lifestyle Travellers	• Conservative Retirees
	• Oldest segment, outdoor interests, slower pace desired	• Older segment, outdoor focused	• Core Target	• Core Target	• Younger end of the segment may be relevant

Source:

BUZZSEEKERS

AGE
- **Most (64%) 18-34yrs**

18-24 (36%); 25-34 (28%);
35-44 (17%); 45-54 (10%); 55+ (9%)

KEY MARKETS
- India, France, Germany, Netherlands Australia, USA

GENDER
- 56% Male

DEFINING ATTITUDES
- Seeking out new experiences
- Always looking for new things to do with one's time
- Taking holidays full of action & excitement
- Happy to pay more for once-in-a lifetime experiences
- See themselves as trendsetters and more popular than others

FAVOURITE TRAVEL ACTIVITIES
- Visiting famous places/iconic sites
- Trying local food & drink specialties

UNIQUE TRAVEL ACTIVITIES
(versus other segments, but still niche)
- Challenge or action-filled activities
- Hands-on learning activities

GB LIKELY ACCOMMODATION
(unique vs others segments)
- Someone else's home (e.g. Airbnb)
- Tent or caravan
- Alternativee accommodation

TRAVEL PLANNING & STYLE
- Friends & family are major influence
- Trusted/famous endorsers influential
- Mobile device natives
- Leave plenty of room for spontaneity

WHO ARE THEY?

Free spirited, spontaneous, Buzzseekers are living in the moment and always looking to make the most of their time. Constantly fueled by the desire for 'more', they are constantly on the search for new ideas, looking to meet new people and engage in new activities that will challenge them, providing fun and a sense of individual growth.

EXPLORERS

AGE
- Most likely to be 55+ (58%)
- 18-24 (4%); 25-34 (8%); 35-44 (12%); 45-54 (17%); 55+ (58%)

KEY MARKETS
- Australia, Germany, France

GENDER
- 52% Female

DEFINING ATTITUDES
- Comfortable with who they are – unbothered how others see them
- Prefer holidays at a slower, relaxed pace
- Not bothered by brands or image
- Happy with what they have
- Like to go to places that don't attract many tourists

FAVOURITE TRAVEL ACTIVITIES
- Experiencing local food & drink
- Experiencing rural life & scenery
- Visiting famous/iconic places

UNIQUE TRAVEL ACTIVITIES
(versus other segments)
- Experiencing rural life & scenery
- Outdoor leisure pursuits
- Visiting parks/gardens

GB LIKELY ACCOMMODATION
(unique vs others segments)
- Bed & Breakfast
- Self-catering

TRAVEL PLANNING & STYLE
- Friends & family are major influence
- Movies, books, magazines & travel agents used
- 49% travel with one other

WHO ARE THEY?

They appear independent of social image – true to themselves, they are contented and enjoy holidays that offer relaxation and a relaxed pace. Nature lovers, they enjoy the outdoors as well as visiting the must see sites. Despite intense pre-planning, they embrace the unexpected, particularly the opportunity to go off the beaten track, meet locals and embrace local culture.

- Source:VisitBritain Segmentation, 2017

ADVENTURERS

AGE
- Over 45yrs (67%)
- 18-24 (8%); 25-34 (9%); 35-44 (18%); 45-54 (22%); 55+ (45%)

KEY MARKETS
Whilst Adventurers are not currently a priority in any of our markets, it is still a significant audience for us.

Adventurers tend to enjoy a very off the beaten path adventure e.g. heli-camping in an urban retreat – offerings which aren't traditionally offered in Britain.

Due to this, when they come to Britain they tend to behave more like a *Buzzseeker* or an *Explorer* and we will naturally pick them up when targeting either of these segments

DEFINING ATTITUDES
- Comfortable with themselves – don't care what others think
- Enjoy spending time outdoors and in natural landscapes
- Like to travel off the beaten track
- Like to seek out new experiences

GENDER
- 53% Male

FAVOURITE TRAVEL ACTIVITIES
- Experiencing rural life & scenery
- Experiencing local food & drink
- Visiting famous/iconic places
- Exploring history & heritage

UNIQUE TRAVEL ACTIVITIES
(versus other segments)
- Outdoor leisure pursuits (long walks, cycling, boating)

GB LIKELY ACCOMMODATION
(unique vs others segments)
- Bed & Breakfast popular

TRAVEL PLANNING & STYLE
- Friends & family are major influence
- Websites, especially 'all in one' ideas
- Tend to travel with one other

WHO ARE THEY?

Like to be away from the crowds and out of the spotlight, they are most comfortable exploring the intrepid outdoors and forging adventures that others (particularly others their age) might not be up for.

- Source:VisitBritain Segmentation, 2017

SIGHTSEERS

AGE
- Over 55yrs (57%)
  18-24 (9%); 25-34 (7%); 35-44 (13%); 45-54 (14%); 55+ (57%)

KEY MARKETS
- USA

GENDER
- 52% Male

DEFINING ATTITUDES
- Prefer cities to countryside
- I know what I like and tend to stick with it
- Like to have a small group of really close friends
- Sensible
- Prefer stability

FAVOURITE TRAVEL ACTIVITIES
- Experiencing local food & drink
- Visiting famous/iconic places
- Experiencing city life

UNIQUE TRAVEL ACTIVITIES
(versus other segments)
- Experiencing city life
- Attending a specific event

GB LIKELY ACCOMMODATION
(unique vs others segments)
- Mainstream only (hotels, or inner city bed and breakfast)

TRAVEL PLANNING & STYLE
- Friends & family are major influence
- Websites and travel agents
- Often look for travel deals
- Most travel with one other (46%)

WHO ARE THEY?

Comfortable with who they are, but can still be quite uncertain when it comes to international travel, wanting to visit places and sites that are well known, safe and well resourced for foreign tourists. They are city tourists through and through – enjoying sites that are easy to find. Sensible, well planned, they like to avoid uncertainty, so will seek advice and reassurance in planning their trip.

- Source:VisitBritain Segmentation, 2017

CULTURE BUFFS

AGE
- 25yrs-54yrs (average 37)
- 18-24 (21%); 25-34 (26%); 35-44 (21%); 45-54 (23%); 55+ (9%)

KEY MARKETS
- China

GENDER
- 57% Female

DEFINING ATTITUDES
- Care about the image portrayed to others
- Like to see travel as a reward for their hard work
- Demand to see the world’s leading sites

FAVOURITE TRAVEL ACTIVITIES
- Experiencing local food & drink
- Visiting famous/iconic places

UNIQUE TRAVEL ACTIVITIES
(versus other segments)
- World class food and drink
- Theme parks, zoos, day outings

GB LIKELY ACCOMMODATION
(unique vs others segments)
- Mainstream hotels and bed and breakfast

TRAVEL PLANNING & STYLE
- Friends & family are major influence
- More likely to travel in medium sized group
- Typically families (41%)

WHO ARE THEY?

Image and brand conscious, these are individuals are concerned with how others see them, so travelling can fulfil this status kudos, particularly in how they travel and what they do abroad, as they still like to choose well known, safe tourist destinations for their travel needs.

Sources

Links to data sources

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