

Discover England: summary insights on overseas visitors to England

Understanding Visitors to England by life-stage

February 2017

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Background

The three-year £40million Discover England Fund was announced by the Government in 2015, with the objective of ensuring that England stays competitive in the rapidly growing global tourism industry, by offering world-class English tourism products to the right customers at the right time. The fund will be awarded to external bidders, with awards for two blocks of projects.

It is vital that funding is awarded to bids which are in line with consumer and business trends, and to this end, the fund will also support additional research, to ensure that project teams and potential bidders have access to relevant market intelligence. The research will include the delivery of both broad insights (that is, with potential relevance to any project) and research into specific areas.

In considering the types of research relevant for the Discover England Fund, it became evident that much of the information that bidders might require is actually already in existence. This includes information on the VisitBritain Insights pages, the dataset from the International Passenger Survey, other research carried out in the past by VisitBritain, or other secondary data sources.

For these reasons, VisitEngland have commissioned BDRC Continental to undertake a substantial programme of tailored secondary research to ensure that bidders can easily access and use existing market intelligence to shape both year 1 and years 2-3 projects. The focus of this programme is the international consumer – while the fund is also intended to stimulate domestic tourism, bids must in the first instance demonstrate their potential to generate growth from inbound markets – and therefore all analysis should be focused on inbound markets.

This report focuses upon understanding life-stages , in particular (and depending on data source):

1. Families/ 0-15 year olds
2. Under 35 year olds
3. 35-50/35-54 year olds
4. 51-64/55-64 year olds
5. 65+ year olds

About this report

The data in this report is largely drawn from:

- **The International Passenger Survey (IPS) (2010, 2011, 2014, 2015):** A combination of raw data – some publically available and some generated via in-depth secondary analysis. Where possible, IPS data is taken from the 2015 survey. In some cases, data has been reported on questions that were only included in one year of IPS (e.g. Activities questions were included in 2010, 2011, and 2014). Survey dates are marked clearly throughout.
- **Arkenford research (September 2013):** A specific project commissioned by VisitBritain into motivations for travel and activities undertaken in key markets
- **Beyond London study. VisitBritain Foresight Issue 117 (July 2013):** A report commissioned by VisitBritain to understand barriers and motivations to travelling beyond London

This report aims to draw on the most up-to-date research available. In some cases, data was several years old. For example, ‘activities’ data is primarily based upon supplementary questions added to IPS between 2010 and 2014. With this in mind, some caution should be applied to results in these areas, although there is little evidence to suggest significant changes in recent years. Although the report aims to focus on visitors to England, this is not always possible with the data available. Therefore the report interchanges between ‘England’ and ‘the UK’ or ‘GB’ where necessary. Figures reported refer to holiday visits.

Due to the differing questionnaires, ‘life-stages’ in this report refers predominantly to age-groups, with the exception of ‘families’ and ‘parties with children’. The IPS, Beyond London and Arkenford questionnaires grouped ages differently, so the age categories from each study are slightly different. The sampling method of IPS means that ‘0-15 year olds’ include any party where a 0-15 year old was randomly sampled. Whilst in many cases this is likely to be a family, it will also include ‘youth parties’ or other groups with children.

Executive summary

Executive summary/1

Section 1: Life-stage holiday needs and behaviours (*Relating to general holiday behaviour – non-England/GB specific*)

What are the holiday needs of each life-stage?

- When choosing holidays ‘enjoying the beauty of the landscape’ is of primary importance for each life-stage. ‘Having fun and laughter’ is also important – particularly for under 35s.
- To ‘explore the place’ and ‘visit a place with a lot of history and historic sites’ are a priority for 51-64 and 65+ year olds, but relatively less important for younger age groups and families. ‘Good shopping’ is of relatively greater importance to younger age groups and families, whereas meeting the locals is relatively more important for 65+ year olds

What types of holiday does each life-stage take?

- ‘Beach holidays’ are the most popular holiday type taken in the last 3-5 years amongst families and people aged 50 and under. Amongst over 50s, holidays to visit friends/relatives are the most frequently taken
- ‘Cities’ were the favoured type of holiday destination for all life-stages. Families are the group most likely to favour beach/seaside resorts (28% citing them as their favourite), 65+ year olds least likely to (13% citing this).
- 65+ year olds are the life-stage most likely to favour ‘mountain areas’ and ‘cruise’.

What activities have each life-stage taken part in in the last 3-5 years?

- 51-64 and 65+ year olds tend to do a narrower range of activities on their holidays than younger life-stages, and index relatively higher on culture and heritage activities such as visiting ‘an historic monument’ or ‘a museum’. In contrast, families and younger life-stages are most likely to have visited ‘a paid wildlife attraction’ or ‘a theme park’.
- Families and 35-50 year olds are most likely to have shopped for luxury products whereas ‘older generations’ demonstrate a desire to purchase locally made products

Executive summary/2

What information sources are influencing holidays?

- Friends/relatives and colleagues are an influence on the choice of holiday destination across life-stages. 'Travel Guide' and 'travel agents/tour operator websites' such as Lonely Planet are a strong influence for all life-stages aside from the 65+ group. 'Talking to online friends on a social network' and 'travel blogs/forums' is an influence for families and those aged 50 and under, but significantly less so for older life-stages.

What information sources are influencing holidays? (contd.)

- Traditional media such as 'official tourist brochures' are most likely to influence older age groups, as are the websites of 'accommodation providers' and 'official tourist brochures'.
- Accommodation type on a holiday tends to be consistent across different life-stages, each group most likely to have stayed in a 'mid-range hotel'. 4-star hotels, budget hotels, family/friends and guest houses were also popular types of accommodation. Luxury 5-star/boutique accommodation had been used by around half of families and under 50s, but by significantly fewer over 50s.

Executive summary/3

Section 2: Holidays to England by life-stage

Holidays to England - demographics

- 35-54 year olds consistently make up the highest numbers of visitors to England on a holiday, and have generated the greatest growth since 2010. 16-34 year olds are the next most well-represented and have also grown significantly in number since 2010. 65+ year olds visit England in the fewest numbers.
- Visitors from France, include the highest number of 16-34 and 35-54 year olds, but only the 6th highest number of 65+ year olds. Conversely, visitors from the United States are most likely to be aged over 65 but 4th most likely to be aged 16-34.

Holidays to England - spend

- 35-54 year olds spend the highest amount of money cumulatively on their holiday – 16-34 year olds the second highest.
- 55-64 year olds spend the highest amount per party - £776 per trip.
- Holiday visitors from the USA spend significantly more than any other market on their holidays in England across the majority of age groups.

Holidays to England – motivations

- Overall, 'heritage/history' is the most popular reason for visiting England, followed by 'culture' and 'to see world famous places'. 'Heritage/history' is a particular driver for those aged 55 and over, 'to see world famous places' more of a driver for younger age groups.
- 'Shopping' tends to be a draw for visitors aged under 55, '24% of 16-34 and 35-54 year olds citing it as a top reason compared to 18% of 55-64 year olds and 13% of those aged over 65.
- Engagement in heritage/culture tends to be consistently high across all life-stages. 'Outdoor activities' tends to be conducted by older age groups, particularly in activities that involve visiting the coast or countryside. The majority of all life-stages conduct shopping on their visits to England, although those aged 65+ were least likely to. 'Going to the pub' is also conducted by the majority, although less so amongst 0-15 year old groups. 16-34 year olds are more likely than other age-groups to go to bars or nightclubs.

Executive summary/4

Holidays to England - seasonality and duration

- 0-15 year old groups are more likely than any other group to visit England in April – June (44% doing so), 16-34 year olds have the widest spread of visits through the year. Visitors aged 65+ are most likely to visit between July and September.
- Older age groups are most likely to stay in England for longer – 34% of those aged 65+ and 27% of those aged 55-64 staying for over 7 nights, compared to an average of 19%. Visitors aged 16-35 and 35-54 are most likely to stay for 1-3 nights.

Holidays to England- satisfaction and recommendation

- 7 in 10 visitors are extremely likely to recommend England as a holiday destination across all life-stages.
- Those aged 65+ are most likely to be satisfied with value for money. Around 3 in 10 visitors were dissatisfied with value for money.
- Overall, the majority of England visitors are very satisfied with the food and attractions they experience in England. Satisfaction is significantly lower with transport (although the majority were at least 'quite satisfied').
- Generally satisfaction with food, transport and attractions increases with age.

Executive summary/5

Section 3: GB Perceptions and Beyond London (*General attitudes and behaviour*)

Is there a market for visiting outside London?

- 16-34 year olds (millennials) exhibit the lowest levels of understanding of Britain's offer outside London, those aged 35+ and families the highest
- Desire to visit places/do activities outside of London is generally higher than awareness, although the extent of interest tends to correlate. Interest in visiting 'the beaches/coastline' is lowest followed by interest in 'sporting events outside of London'.
- Despite significantly lower awareness of 'other major cities outside of London', 16-34 year olds are almost as likely as average to be interested in visiting. Culture, tradition and heritage tend to appeal more to older age groups, in particular 55-64 year olds.

What are the perceptions of GB compared to other countries for their top holiday needs?

- Amongst families and Under 35s, Britain is rated below the country average on the majority of metrics they regard as most important. However, it does not score the lowest on any, and is rated higher than average for offering 'famous sites and places'. Families and under 35s tend to regard Australia as the best place for the majority of their needs – France and the USA also featuring. The Netherlands tends to receive the lowest ratings.
- 35+ year olds are all less likely than average to rate Britain as the 'best place' to 'enjoy the landscape and scenery' – their most important motivation when choosing a holiday. Conversely, each age group rates Britain as high or higher than average as a place to 'see famous sites/places' – a factor that increases in importance for older age groups.
- 'History/historic sites' are rated higher than average for 51-64 and 65+ year olds – an attribute that is more important for these age groups than others. 65+ year olds also more likely than average to regard Britain as 'the best place' for 'broadening my mind' and 'having fun and laughter'.

Executive summary/6

Section 3: GB Perceptions and Beyond London (*General attitudes and behaviour*)

Visiting outside London

- Overall, worries about driving in Britain was the main barrier to visiting outside of London, particularly amongst those aged 65+. Other barriers included ‘there are other places higher up my list of places to visit’ and ‘there so much to do in London I wouldn’t have time to go outside London’.
- For 16-34 year olds, the appeal of other places was the most important reason. Notably, ‘not knowing what is there is to see outside of London’, and ‘there are more exciting place elsewhere in Europe’ were significantly more likely to be mentioned than other age groups.
- Of those that have visited outside of London, Britain’s history was regarded as the main reason for doing so, followed by its ‘unique and diverse regions’ and ‘unique and beautiful’ countryside. Those aged over 35 were significantly more likely to cite history, diverse regions and beautiful countryside than 16-34 year olds. 16-34 year olds were significantly more likely to cite fun and vibrant cities.

Life-stage summary slides

Key findings dashboard: Family/0-15

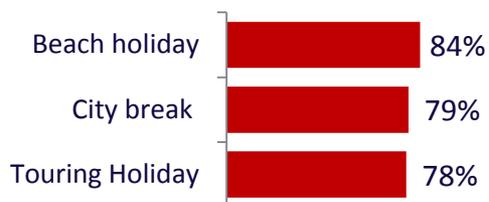
Key holiday needs

(non-GB/England-specific)

Top 3 Trip Needs (% important)

- 1 Enjoy the landscape (81%)
- 2 Have fun and laughter (81%)
- 3 See famous sites (76%)

Top 3 Trip Types (Last 3-5 yrs.)

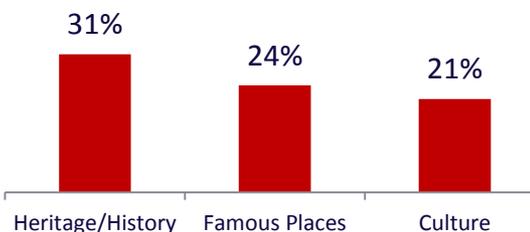


Top 3 Info. sources (Last 3-5 yrs.)

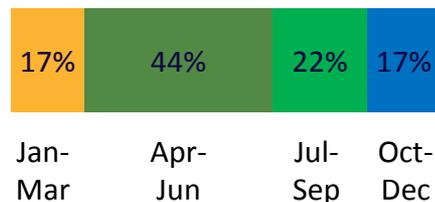


Holidays in England

Top 3 Reasons for Visiting



When visited in 2015



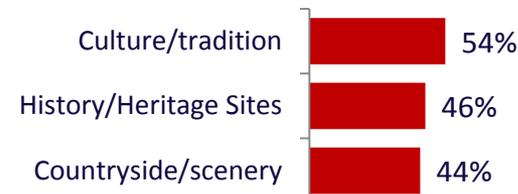
Top 3 activities in 2015



Perceptions and Barriers

(GB/London-specific)

Top 3 awareness of things to do in GB



Ratings of GB on key attributes

Attributes	GB	Average
Enjoy the landscape	28%	39%
Have fun and laughter	16%	22%
See famous sites	50%	45%

Barriers to travelling beyond London

- 1 Driving in GB (45%)
- 2 Places higher up list (43%)
- 3 Enough to do in London (36%)

Key findings dashboard: Aged under 35

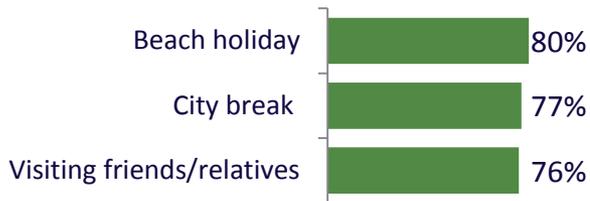
Key holiday needs

(non-GB/England-specific)

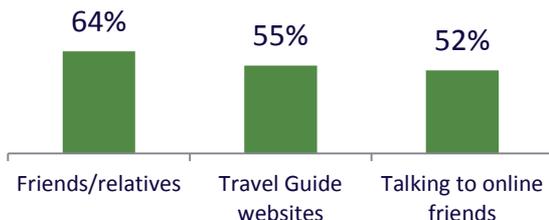
Top 3 Trip Needs (% important)

- 1 Have fun and laughter (80%)
- 2 Enjoy the landscape (76%)
- 3 Experience new things/
Experience a wow factor (73%)

Top 3 Trip Types (Last 3-5 yrs.)

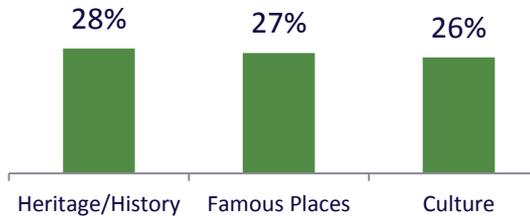


Top 3 Info. sources (Last 3-5 yrs.)

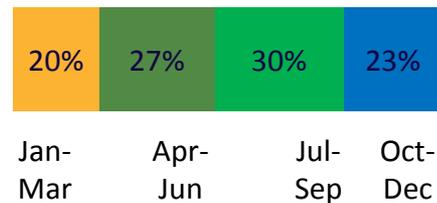


Holidays in England

Top 3 Reasons for Visiting



When visited in 2015



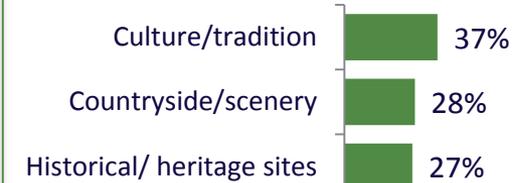
Top 3 activities in 2015



Perceptions and Barriers

(GB/Beyond London-specific)

Top 3 awareness of things to do in GB



Ratings of GB on key attributes

Attributes	GB	Average
Have fun and laughter	21%	22%
Enjoy the landscape	30%	40%
Experience new things	29%	35%

Barriers to travelling beyond London

- 1 Places higher up list (48%)
- 2 Driving in GB (45%)
- 3 Enough to do in London + Low awareness outside London (37%)

Key findings dashboard: Aged 35-50/ 35-54

Key holiday needs

(non-GB/England-specific)

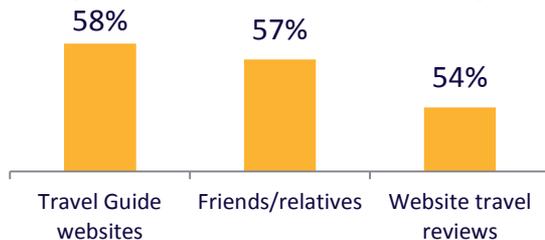
Top 3 Trip Needs (% important)

- 1 Enjoy the landscape (81%)
- 2 Have fun and laughter (80%)
- 3 See famous sites (75%)

Top 3 Trip Types (Last 3-5 yrs.)

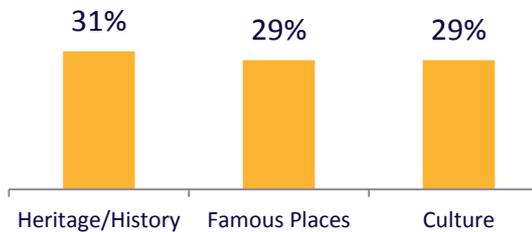


Top 3 Info. sources (Last 3-5 yrs.)

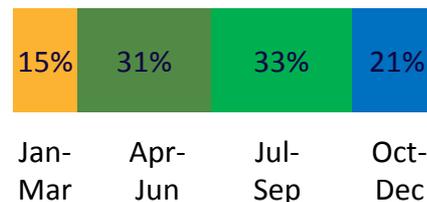


Holidays in England

Top 3 Reasons for Visiting



When visited in 2015



Top 3 activities in 2015



Perceptions and Barriers

(GB/Beyond London-specific)

Top 3 awareness of things to do in GB



Ratings of GB on key attributes

Attributes	GB	Average
Enjoy the landscape	25%	38%
Have fun and laughter	16%	23%
See famous sites/places	51%	45%

Barriers to travelling beyond London

- 1 Driving in GB (51%)
- 2 Places higher up list (44%)
- 3 Enough to do in London (41%)

Key findings dashboard: Aged 51-64/ 55-64

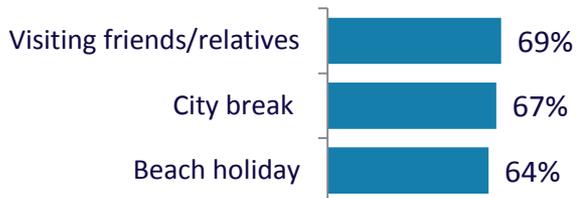
Key holiday needs

(non-GB/England-specific)

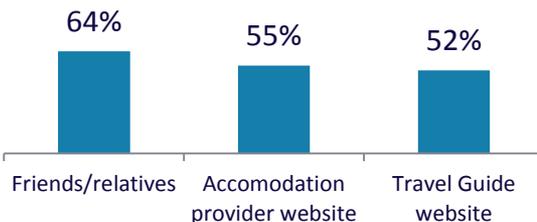
Top 3 Trip Needs (% important)

- 1 Enjoy the landscape (83%)
- 2 See famous sites (77%)
- 3 Have fun and laughter (73%)

Top 3 Trip Types (Last 3-5 yrs.)

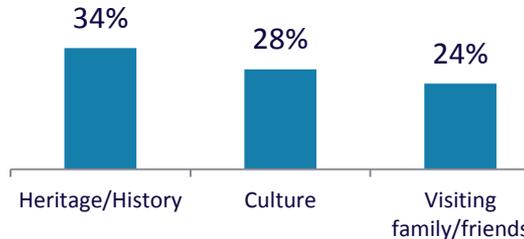


Top 3 Info. sources (Last 3-5 yrs.)

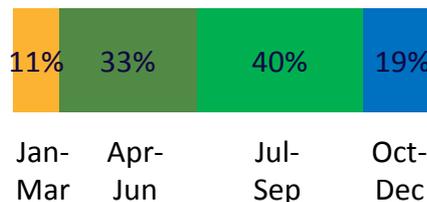


Holidays in England

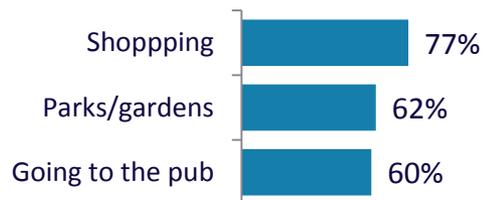
Top 3 Reasons for Visiting



When visited in 2015



Top 3 activities in 2015



Perceptions and Barriers

(GB/Beyond London-specific)

Top 3 awareness of things to do in GB



Ratings of GB on key attributes

Attributes	GB	Average
Enjoy the landscape	21%	30%
See famous sites/places	36%	36%
Have fun & laughter	11%	16%

Barriers to travelling beyond London

- 1 Places higher up list (44%)
- 1 Enough to do in London (44%)
- 3 Driving in GB (41%)

Key findings dashboard: Aged over 65

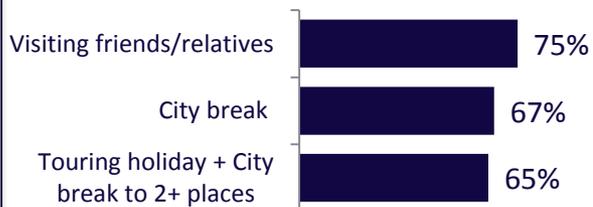
Key holiday needs

(non-GB/England-specific)

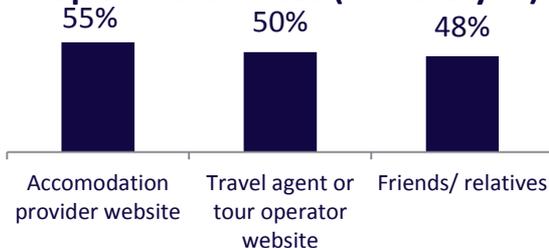
Top 3 Trip Needs (% important)

- 1 Enjoy the landscape (79%)
- 2 See famous sites (70%)
- 3 Visit place with lots of history (69%)

Top 3 Trip Types (Last 3-5 yrs.)

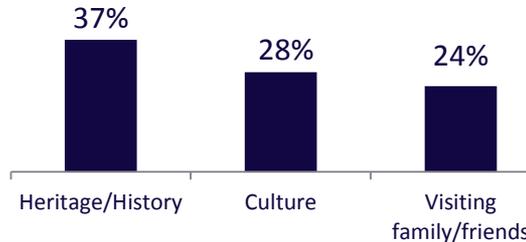


Top 3 Info. sources (Last 3-5 yrs.)

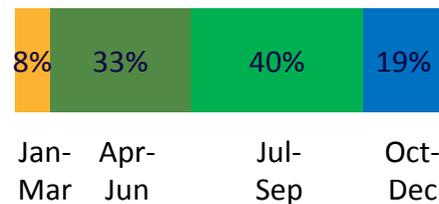


Holidays in England

Top 3 Reasons for Visiting



When visited in 2015



Top 3 activities in 2015



Perceptions and Barriers

(GB/Beyond London-specific)

Top 3 awareness of things to do in GB



Ratings of GB on key attributes

Attributes	GB	Average
Enjoy the landscape	21%	30%
See famous sites/places	48%	44%
History/ historic sites	51%	33%

Barriers to travelling beyond London

- 1 Driving in GB (64%)
- 2 Places higher up list (50%)
- 3 Enough to do in London (36%)

Understanding the holiday needs and behaviours of each life-stage

Relating to general holiday behaviour – non-England/GB specific.

General holiday needs by life-stage/1

Source: Arkenford Research

% selecting 6/7 where 0 means wouldn't want at all and 7 means would definitely want in a holiday		All	Families	Under 35	35-50	51-64	65+
1.	Enjoy the beauty of the landscape	79%	81%	76%	81%	83%	79%
2.	Have fun and laughter	78%	81%	80%	80%	73%	68%
3.	See world famous sites and places	74%	76%	72%	75%	77%	70%
4.	Experience things that are new to me	71%	75%	73%	72%	69%	62%
5.	Soak up the atmosphere	71%	74%	69%	74%	72%	60%
6.	Enjoy local specialities (food and drink)	71%	74%	71%	73%	68%	65%
7.	Explore the place	70%	72%	68%	72%	70%	67%
8.	Enjoy peace and quiet	70%	73%	69%	71%	70%	61%
9.	Broaden my mind / stimulate my thinking	69%	73%	69%	72%	65%	68%
10.	Be physically healthier	69%	75%	66%	72%	70%	63%
11.	Experience activities / places with a wow factor	69%	73%	73%	70%	63%	52%
12.	Chill / slow down to a different pace of life	69%	72%	67%	72%	68%	51%
13.	Feel connected to nature	68%	73%	65%	72%	70%	54%
14.	Visit a place with a lot of history / historic sites	67%	72%	63%	70%	71%	69%
15.	Have dedicated time with my other half	67%	72%	68%	69%	62%	56%
16.	Do what I want when I want spontaneously	67%	71%	67%	69%	61%	59%
17.	Enjoy high quality food and drink (gourmet)	65%	71%	67%	67%	60%	52%

‘Enjoying the beauty of the landscape’ is of primary importance for each life-stage when choosing their holidays. ‘Having fun and laughter’ is also important – for Under 35s the most important– as is ‘seeing world famous sites and places’.

There are some notable variations in the importance of needs across life-stages. For under 35s ‘experiencing things that are new to me’ is the 3rd most important need, compared to the 9th and 10th most important for 51-64 and 65+ year olds. In contrast, to ‘explore the place’ and ‘visit a place with a lot of history and historic sites’ are most important for 51-64 and 65+ year olds, but less so for younger age groups and families.

General holiday needs by life-stage/2

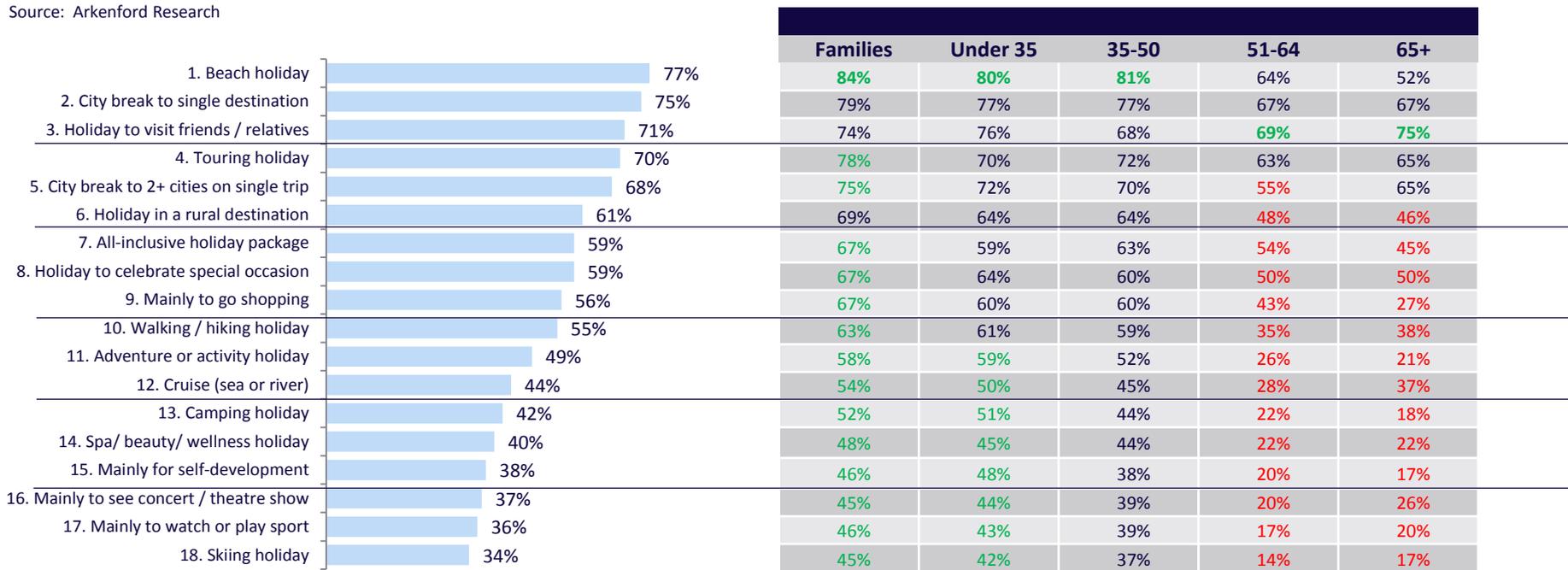
Source: Arkenford Research

% selecting 6/7 where 0 means wouldn't want at all and 7 means would definitely want							
All			Families	Under 35	35-50	51-64	65+
18.	Get some sun	62%	68%	63%	65%	56%	47%
19.	Feel special or spoilt	56%	63%	57%	59%	49%	39%
20.	Good shopping	55%	64%	59%	59%	43%	31%
21.	Revisit places of nostalgic importance to me	55%	59%	54%	56%	54%	48%
22.	Get off the beaten track	52%	56%	53%	53%	48%	46%
23.	Do something environmentally sustainable / green	48%	57%	48%	51%	46%	36%
24.	Visit places important to my family's history	48%	54%	47%	49%	46%	42%
25.	Meet the locals	48%	52%	48%	50%	43%	50%
26.	Meet and have fun with other tourists	46%	54%	47%	49%	37%	40%
27.	Experience adrenalin filled adventures	43%	50%	52%	44%	23%	29%
28.	Go somewhere that provided lots of laid on entertainment	42%	48%	47%	43%	30%	21%
29.	Do something the children would really enjoy	41%	73%	39%	55%	20%	20%
30.	Party	40%	48%	46%	42%	24%	21%
31.	To participate in an active pastime or sport	38%	46%	45%	41%	21%	20%
32.	Watch a sporting event	37%	44%	40%	40%	27%	21%
33.	Do something useful like volunteering to help on a project	36%	44%	39%	40%	23%	22%

Although not a leading priority for any age group, 'good shopping' assumes relatively greater importance to younger age groups and families. 'Meeting the locals' is relatively more important for 65+ year olds than any other life-stage. Unsurprisingly, 'doing something the children would really enjoy' is more important for families.

Types of holiday taken in the past 3-5 years

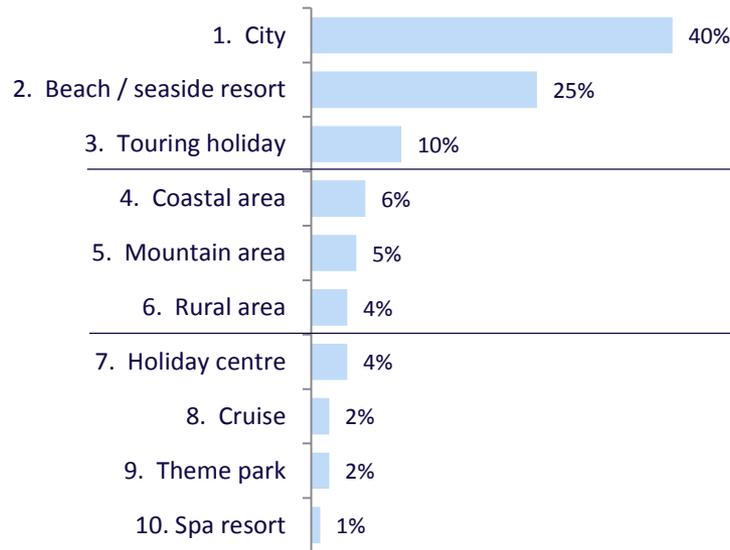
Source: Arkenford Research



‘Beach holidays’ are the most popular holiday type taken in the last 3-5 years amongst families and people aged 50 and under. For those aged over 50, a ‘holiday to visit friends/relatives’ is the most popular type of holiday.

Favourite type of holiday destination in past 3-5 years

Source: Arkenford Research



	% within age group				
	Families	Under 35	35-50	51-64	65+
1. City	41%	43%	40%	31%	36%
2. Beach / seaside resort	28%	26%	26%	22%	13%
3. Touring holiday	9%	8%	11%	15%	12%
4. Coastal area	5%	6%	6%	9%	8%
5. Mountain area	5%	5%	4%	6%	14%
6. Rural area	3%	4%	4%	5%	5%
7. Holiday centre	3%	4%	3%	5%	4%
8. Cruise	2%	1%	2%	3%	6%
9. Theme park	2%	2%	3%	2%	2%
10. Spa resort	1%	1%	1%	1%	1%

N.B. This question was 'single choice' meaning there is less opportunity for deviation by life-stage. Results are therefore presented as percentages.

Despite the prevalence of beach holidays, 'Cities' were regarded as the favourite type of holiday destination for all life-stages. That said, there is some variation. Families are the group most likely to favour beach/seaside resorts (28% citing them as their favourite), 65+ year olds least likely to (13% citing this). 65+ year olds are the life-stage most likely to cite 'mountain areas' and 'cruise'.

Activities taken part in on a general holiday in past 3-5 years/ 1

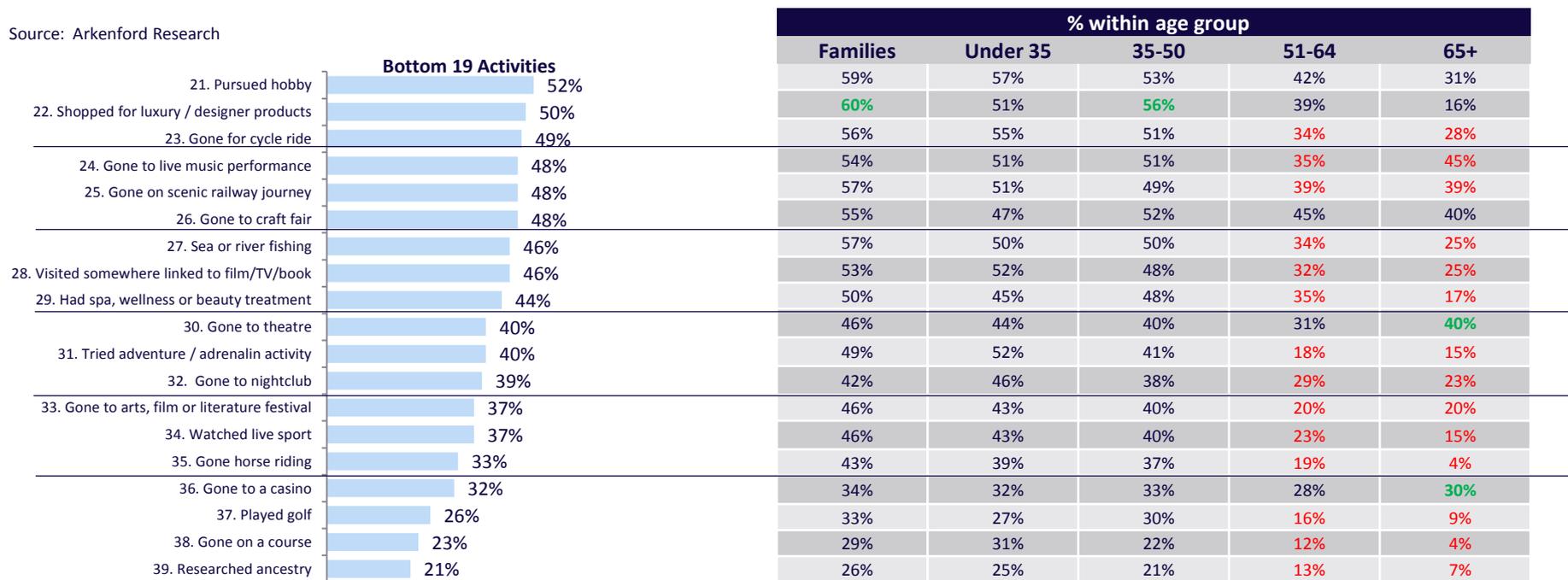
Source: Arkenford Research

Top 20 Activities		% within age group				
		Families	Under 35	35-50	51-64	65+
1. Visited an historic monument	83%	84%	82%	83%	82%	85%
2. Walk / hike in countryside / coast	83%	87%	84%	86%	79%	71%
3. Visited a park	82%	84%	81%	85%	79%	77%
4. Shopped for clothes	81%	85%	82%	84%	72%	59%
5. Tried new food for first time	81%	83%	81%	82%	77%	71%
6. Shopped for locally made products	80%	84%	78%	82%	80%	80%
7. Visited paid tourist attraction	79%	82%	79%	81%	74%	73%
8. Visited museum	77%	80%	77%	78%	78%	78%
9. Sunbathed on beach / by pool	75%	80%	75%	80%	67%	51%
10. Had a gourmet meal	73%	78%	71%	76%	74%	66%
11. Visited a paid wildlife attraction	72%	80%	72%	78%	65%	53%
12. Guided sightseeing tour	69%	73%	66%	71%	69%	60%
13. Visited garden	69%	72%	67%	70%	72%	68%
14. Visited palace / stately home	67%	71%	66%	69%	67%	65%
15. Visited religious building	67%	68%	67%	65%	67%	72%
16. Visited theme park	66%	77%	70%	71%	47%	48%
17. Gone on scenic drive	66%	70%	66%	69%	61%	60%
18. Watched wildlife / birdlife	64%	72%	62%	69%	59%	49%
19. Visited castle	58%	63%	59%	62%	51%	47%
20. Visited art gallery	55%	58%	55%	55%	53%	59%

There is some variation in the activities different life-stages have conducted on a holiday in the last 3-5 years. Those aged under 50 tend to conduct a wide spread of activities, whilst 51-64 and 65+ year olds tend to index relatively highly on culture and heritage activities – in particular visiting ‘an historic monument’, ‘a museum’ and ‘a garden’. Older generations’ interest in culture also extends to a desire to purchase locally made products. In contrast, families and younger life-stages are more likely to have visited ‘a paid wildlife attraction’ or ‘a theme park’, ‘been on a walk/hike in the countryside/by the coast’ and to have ‘shopped for clothes’. Younger life-stages are also more likely to have ‘sunbathed on a beach/pool’

Activities taken part in on a general holiday in past 3-5 years/ 2

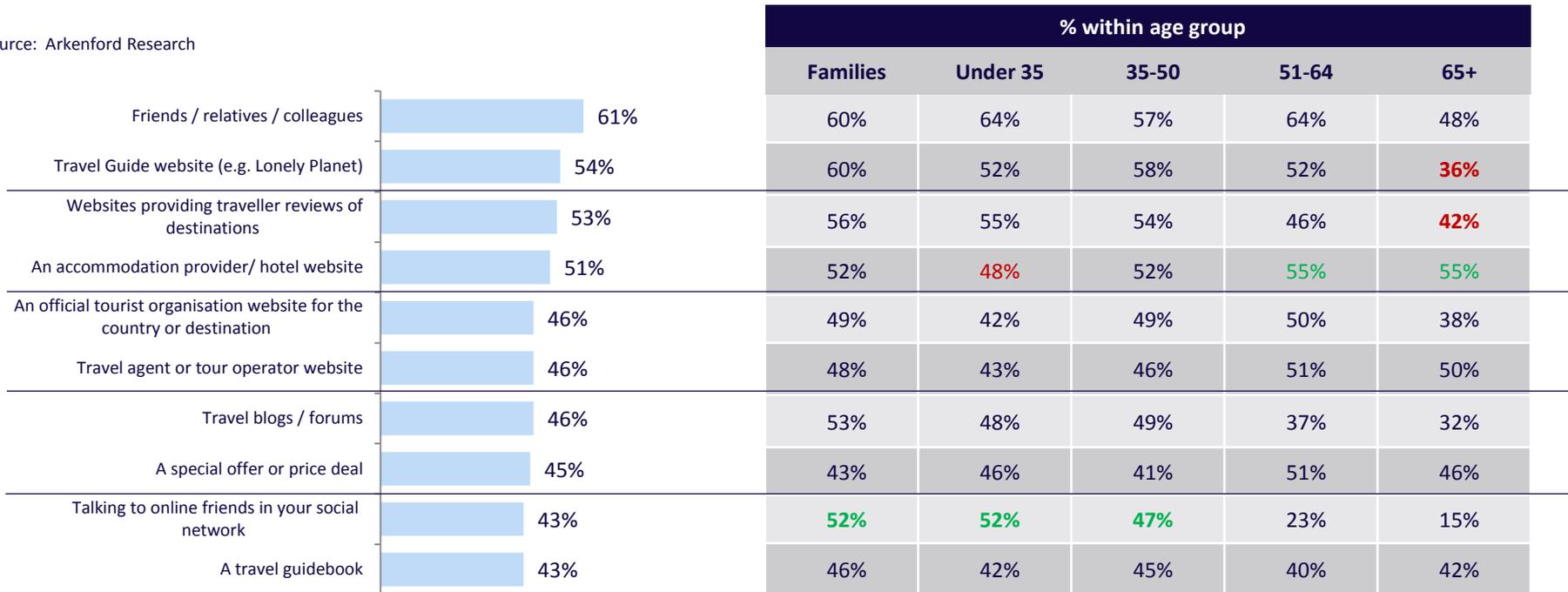
Source: Arkenford Research



Families and 35-50 year olds are most likely to have shopped for luxury/designer products.

Information sources influencing destination choice (Top 10)

Source: Arkenford Research

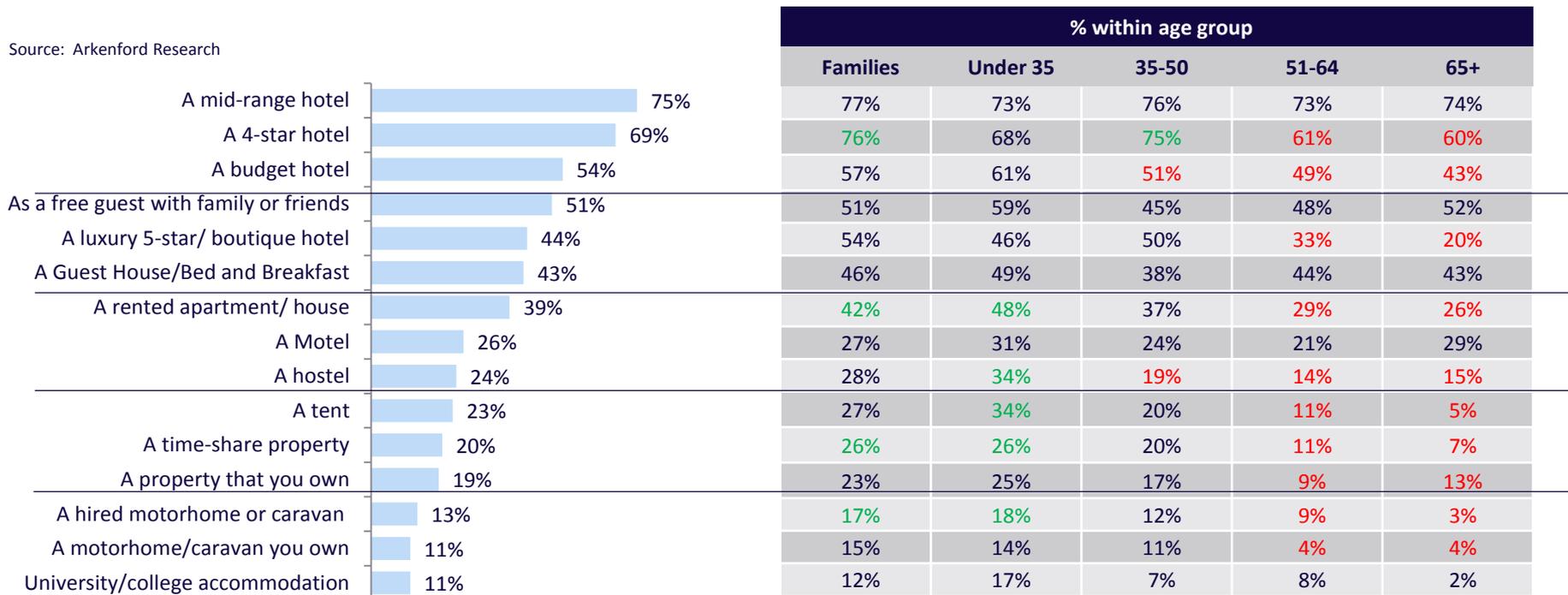


Friends/relatives and colleagues tend to be a fairly constant influence on the choice of holiday destination across life-stages. However, the impact of other information sources is more varied. ‘Travel Guide’ and ‘travel agents/tour operator websites’ such as Lonely Planet are a strong influence for all life-stages aside from the 65+ group. ‘Talking to online friends on a social network’ and ‘travel blogs/forums’ is an influence for families and those aged 50 and under, but significantly less so for older life-stages.

Traditional media such as ‘official tourist brochures’ are most likely to influence older age groups, as are online sources such as ‘accommodation provider’ and ‘official tourist organisation’ websites.

Types of accommodation used in the past 3 years

Source: Arkenford Research

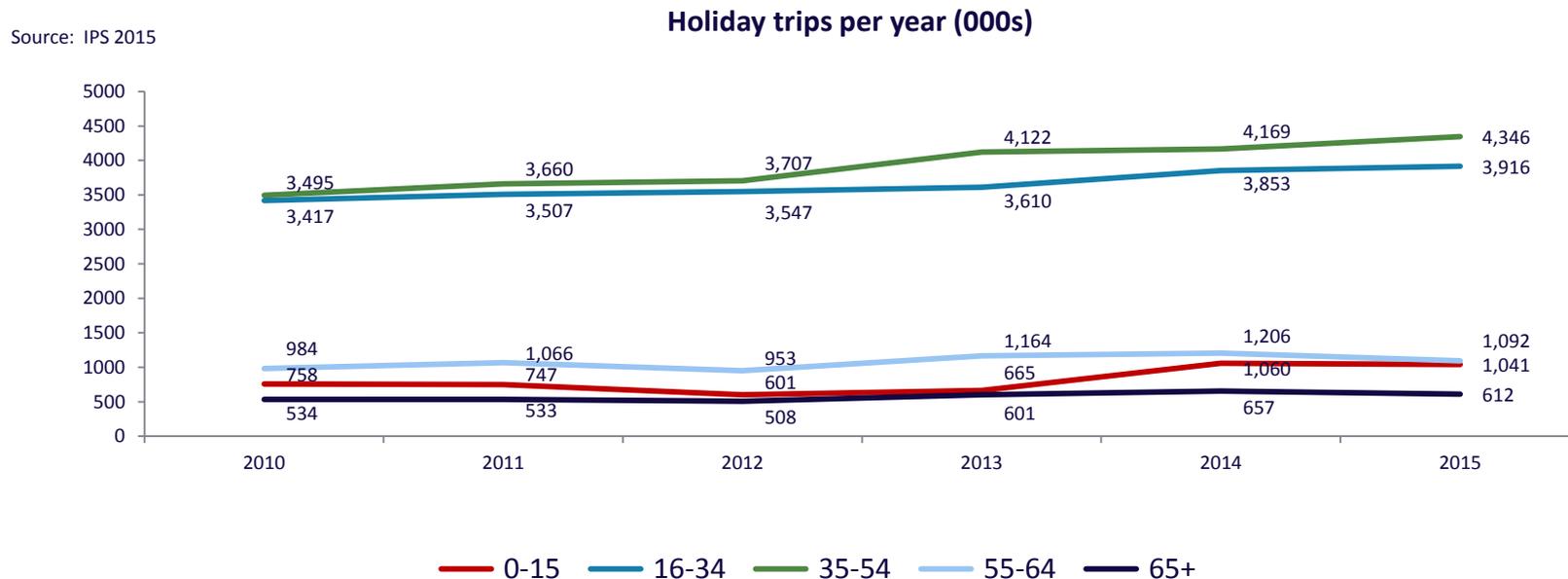


Accommodation type on a holiday tends to be consistent across different life-stages, each group most likely to have stayed in a 'mid-range hotel', followed by 'a 4-star hotel' and 'a budget hotel'.

Holidays in England

Relating to holidays taken in England

Annual trends in trips to England by life-stage*

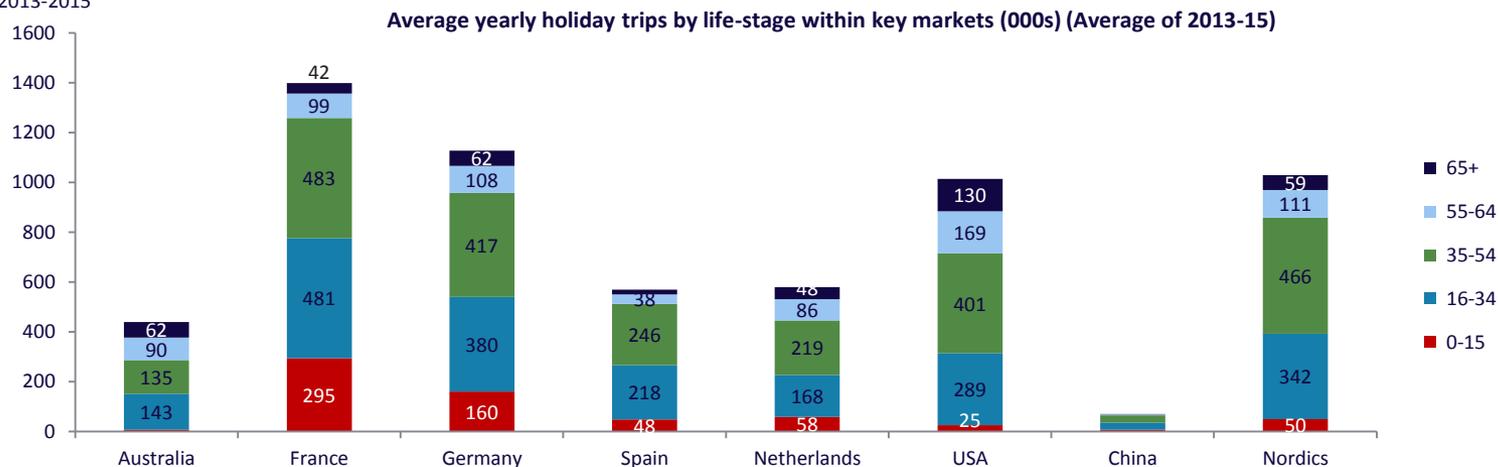


35-54 year olds consistently make up the highest numbers of visitors to England on a holiday, and have generated the greatest growth since 2010. 16-34 year olds are the next most well-represented and have also grown significantly in number since 2010. 65+ year olds visit England in the fewest numbers.

*Due to sampling methodology, volumes are indicative rather than exact. See page 4 for a more detailed explanation

Number of trips to England by life-stage and market*

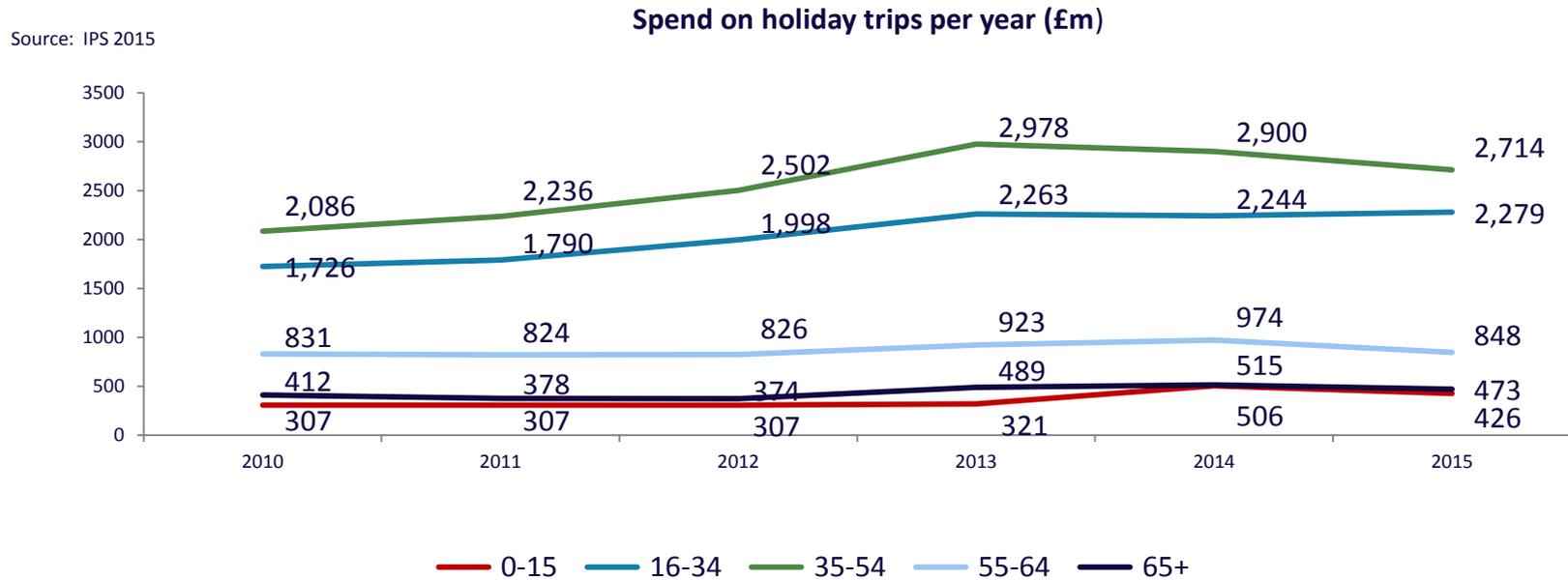
Source: IPS 2013-2015



There are some notable differences in trip numbers by market. Visitors from France, for example, include the highest number of 16-34 and 35-54 year olds, but only a relatively number of 65+ year olds. Conversely, visitors from the United States are most likely to be aged over 65 but 4th most likely to be aged 16-34.

*Due to sampling methodology, volumes are indicative rather than exact. See page 4 for a more detailed explanation

Annual trends in spend by life-stage

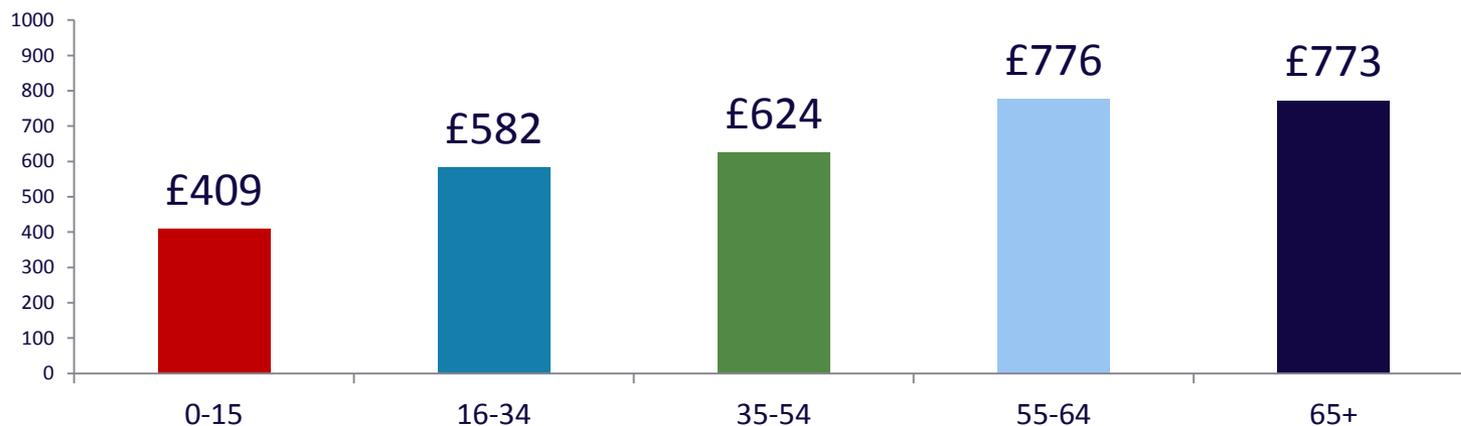


Inline with trips, 35-54 year olds spend the most on their holidays in England, followed by 16-34 year olds. Although visiting in the lowest numbers, 65+ year olds spend marginally more than 0-15 year old groups on their holidays in England.

Average spend on holiday in England by life-stage

Average life-stage spend by party (2015)

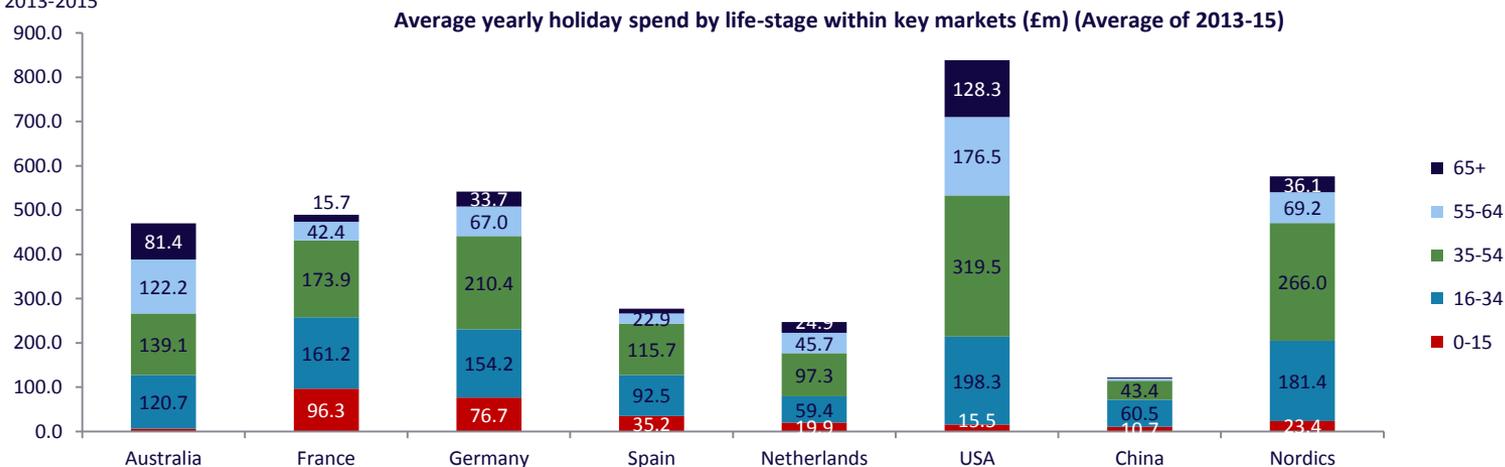
Source: IPS 2015



On average, older age groups spend more on their holidays to England. 55-64 year olds spend the most, although only marginally more than 65+ year olds.

Spend in England by life-stage and market*

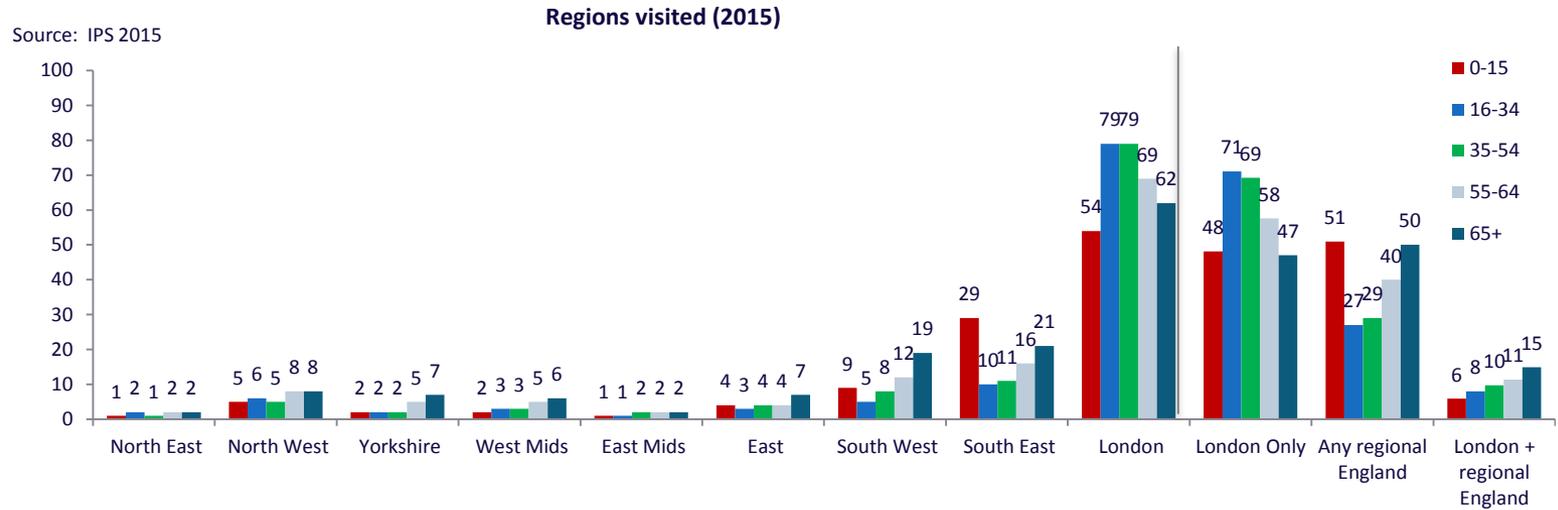
Source: IPS 2013-2015



Holiday visitors from the USA spend significantly more than any other market on their holidays in England across all age groups except for the family (0-15 year old groups) category.

*Due to sampling methodology, volumes are indicative rather than exact. See page 4 for a more detailed explanation

Regions visited in England



3 in 4 of all visitors to England visited London on their holiday, increasing to 79% amongst 18-54 year olds. Older age groups were more likely to stay elsewhere in England (regional England), 40% of 55-64 year olds and 50% of 65+ year olds having done so. Older age groups are also more likely to have conducted a trip that included a visit to London *and* regional England.

Reason for visit to England

Source: IPS 2015



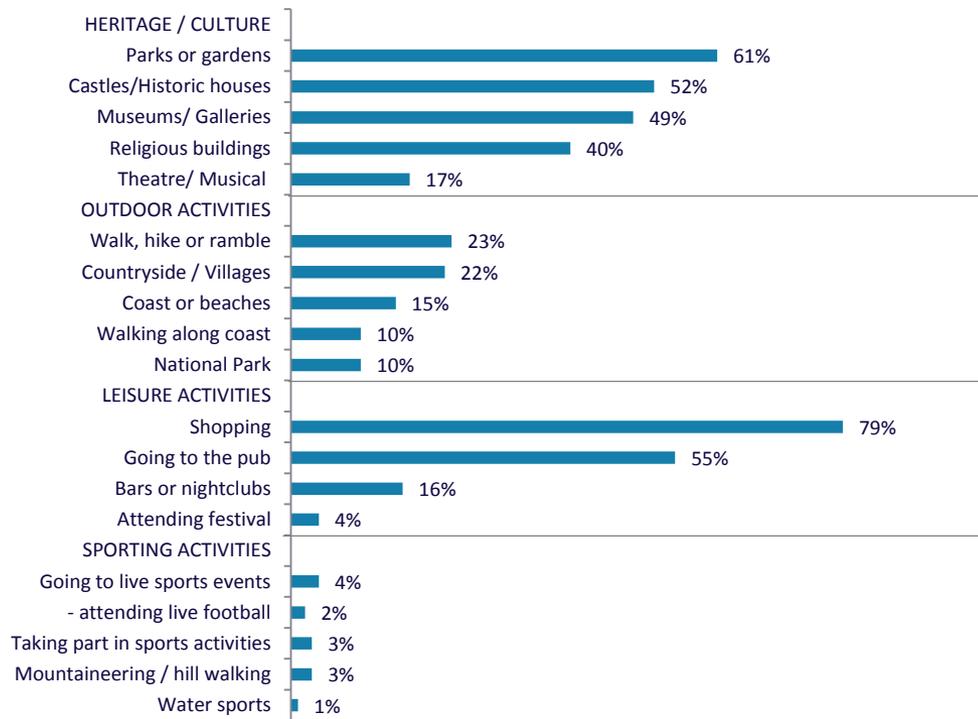
	% within age group				
	0-15	16-34	35-54	55-64	65+
Heritage/history	31%	28%	31%	34%	37%
Culture	21%	26%	29%	28%	28%
To see world famous places	24%	27%	29%	23%	19%
Visiting family/friends	8%	24%	23%	24%	24%
Shopping	11%	24%	24%	18%	13%
Relaxation	4%	15%	16%	15%	14%
Countryside/outdoors/ adventure	5%	6%	9%	12%	16%
Going out to eat/drink	1%	5%	5%	3%	2%
Sport	1%	2%	3%	2%	2%
Other	23%	9%	8%	11%	12%

Overall, ‘heritage/history’ is the most popular reason for visiting England, followed by ‘culture’ and ‘to see world famous places’. ‘Heritage/history’ is a particular driver for those aged 55 and over, ‘to see world famous places’ more of a driver for younger age groups.

‘Shopping’ tends to be a draw for those aged under 55, ‘24% of 16-34 and 35-54 year olds citing it as a top reason compared to 18% of 55-64 year olds and 13% of those aged over 65.

Participation in activities on holiday in England

Source: IPS 2010, 2011, 2014

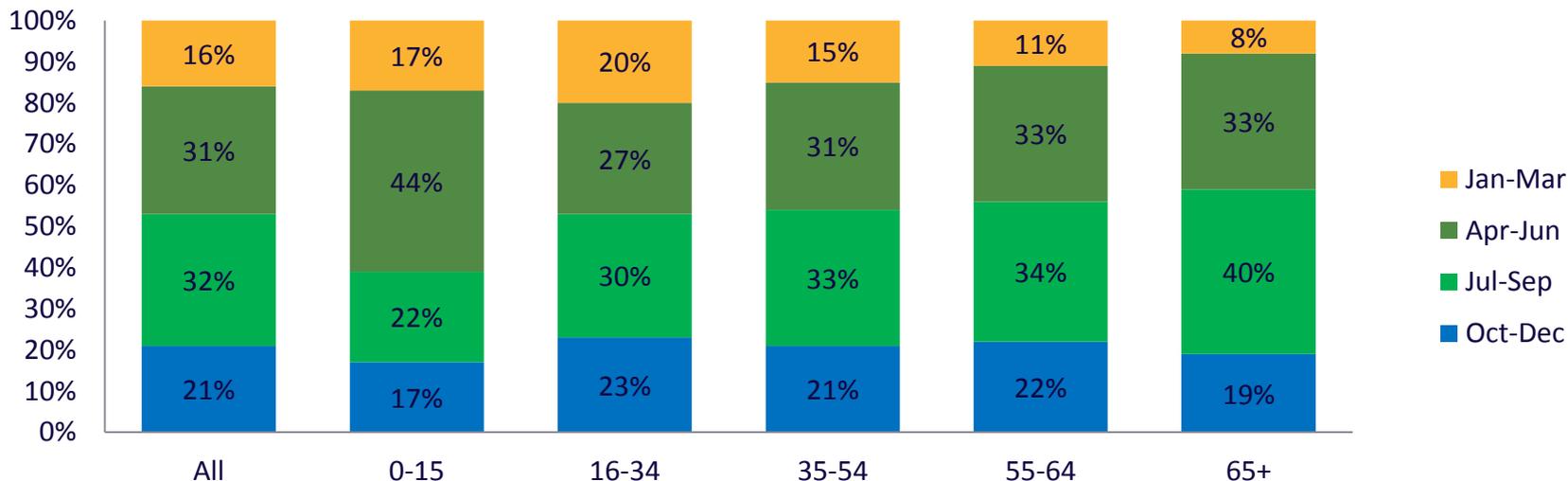


	% within age group				
	0-15	16-34	35-54	55-64	65+
HERITAGE / CULTURE					
Parks or gardens	62%	60%	61%	62%	57%
Castles/Historic houses	56%	48%	52%	58%	55%
Museums/ Galleries	51%	49%	49%	50%	46%
Religious buildings	40%	36%	40%	45%	43%
Theatre/ Musical	13%	15%	17%	21%	20%
OUTDOOR ACTIVITIES					
Walk, hike or ramble	21%	18%	23%	28%	28%
Countryside / Villages	19%	15%	22%	32%	35%
Coast or beaches	15%	9%	14%	21%	22%
Walking along coast	11%	6%	11%	13%	14%
National Park	9%	7%	10%	12%	13%
LEISURE ACTIVITIES					
Shopping	80%	78%	80%	77%	69%
Going to the pub	46%	60%	56%	60%	56%
Bars or nightclubs	20%	26%	12%	8%	5%
Attending festival	4%	4%	5%	4%	4%
SPORTING ACTIVITIES					
Going to live sports events	3%	4%	3%	3%	2%
- attending live football	2%	2%	2%	1%	1%
Taking part in sports activities	4%	2%	2%	3%	2%
Mountaineering / hill walking	3%	2%	4%	5%	4%
Water sports	1%	1%	1%	0%	0%

Engagement in heritage/culture tends to be consistently high across all life-stages. ‘Outdoor activities’ tends to be conducted by older age groups, particularly in activities that involve visiting the coast or countryside. The majority of all life-stages conduct shopping on their visits to England, although those aged 65+ were least likely to. ‘Going to the pub’ is also conducted by the majority, although less so amongst 0-15 age group. 16-34 year olds are more likely to go to bars or nightclubs than other age groups.

Seasonality of overseas holiday visits to England

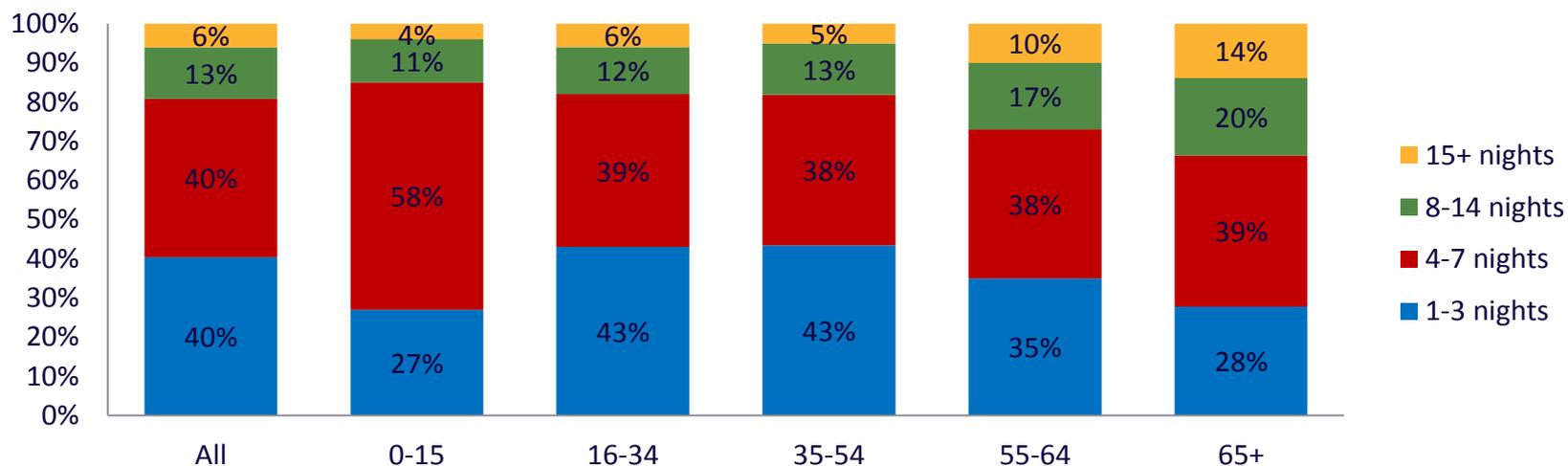
Source: IPS 2015



There is notable variation in the seasonality of visits depending on life-stage. 0-15 year old age group are more likely than any other group to visit England in April – June (44% doing so), 16-34 year olds have the widest spread of visits through the year. Visitors aged 65+ are most likely to visit between July and September.

Duration of overseas holiday visits to England

Source: IPS 2015

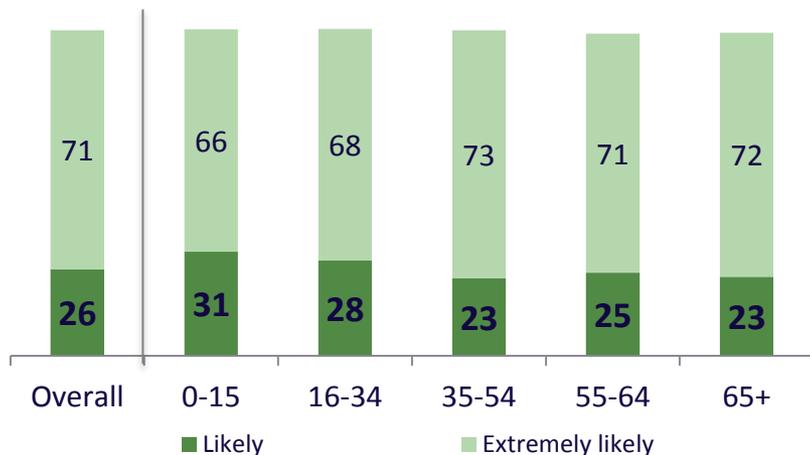


Holiday length also varies across life-stages. Older age groups are most likely to stay for longer – 34% of those aged 65+ and 27% of those aged 55-64 staying for over 7 nights, compared to an average of 19%. Visitors aged 16-35 and 35-54 are most likely to stay for 1-3 nights. (For overall holiday duration trends please see main report [here](#))

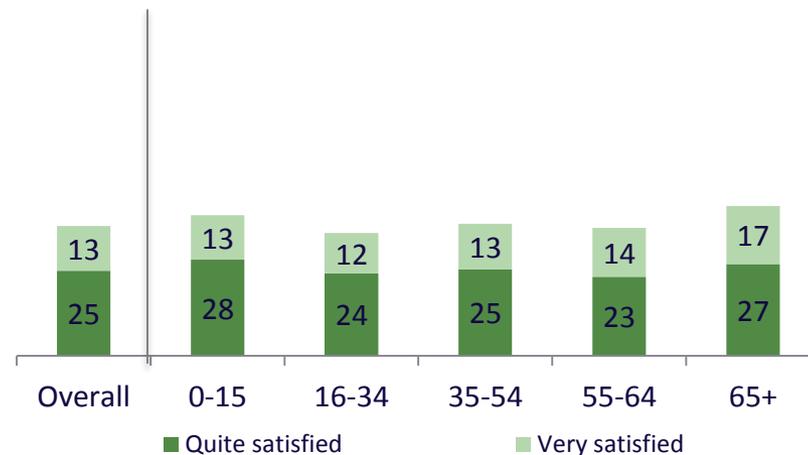
Recommendation and Value for money

Source: IPS 2015

Likelihood to recommend (% Likely)*



Value for money ratings (% Satisfied)*



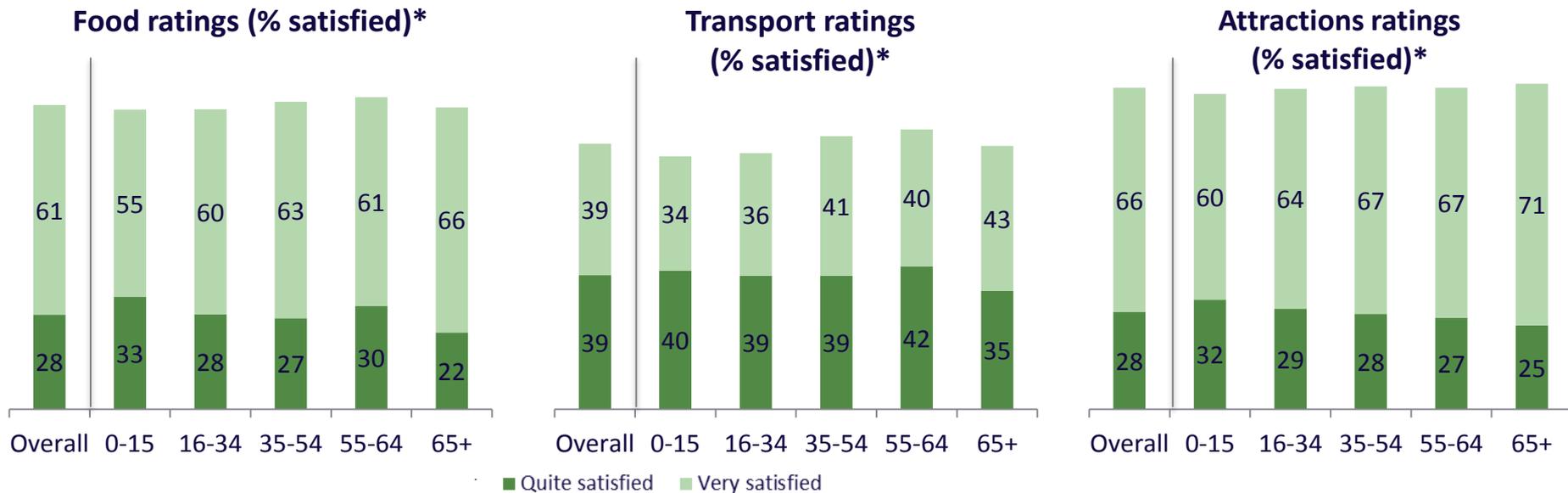
Likelihood to recommend England as a holiday destination is high amongst all life-stages, around 7 in 10 stating they are 'extremely likely' to do so. Ratings are marginally lower amongst 16-34 years olds (68% saying they would do so compared to an average of 71%).

Those aged 65+ are most likely to be satisfied with value for money of a holiday to England. Around 3 in 10 visitors were dissatisfied with England in terms of value for money.

*Charts convey those that answered 'Top 2 boxes'. Neutral and negative responses were also asked but are not included in the charts.

Satisfaction with food, transport and attractions in England (%)

Source: IPS 2015



Overall, the majority of England visitors are very satisfied with the food and attractions they experience in England. Satisfaction is significantly lower with transport (although the majority were at least 'quite satisfied').

Generally satisfaction with food, transport and attractions correlates with increasing age.

*Charts convey those that answered 'Top 2 boxes'. Neutral and negative responses were also asked but are not included in the charts.

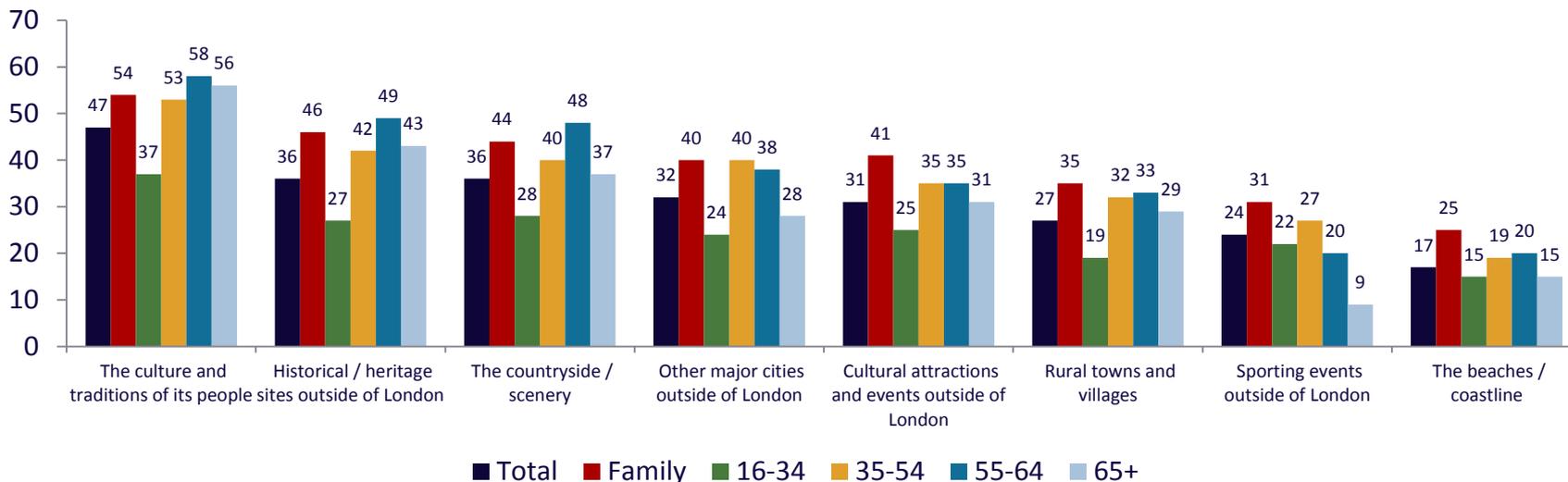
Beyond London

Relating to holidays taken in London or beyond

Awareness of GB places/activities

Source: VisitBritain Beyond London study

(% that rate knowledge about place/activity at least 4-5 out of 5)



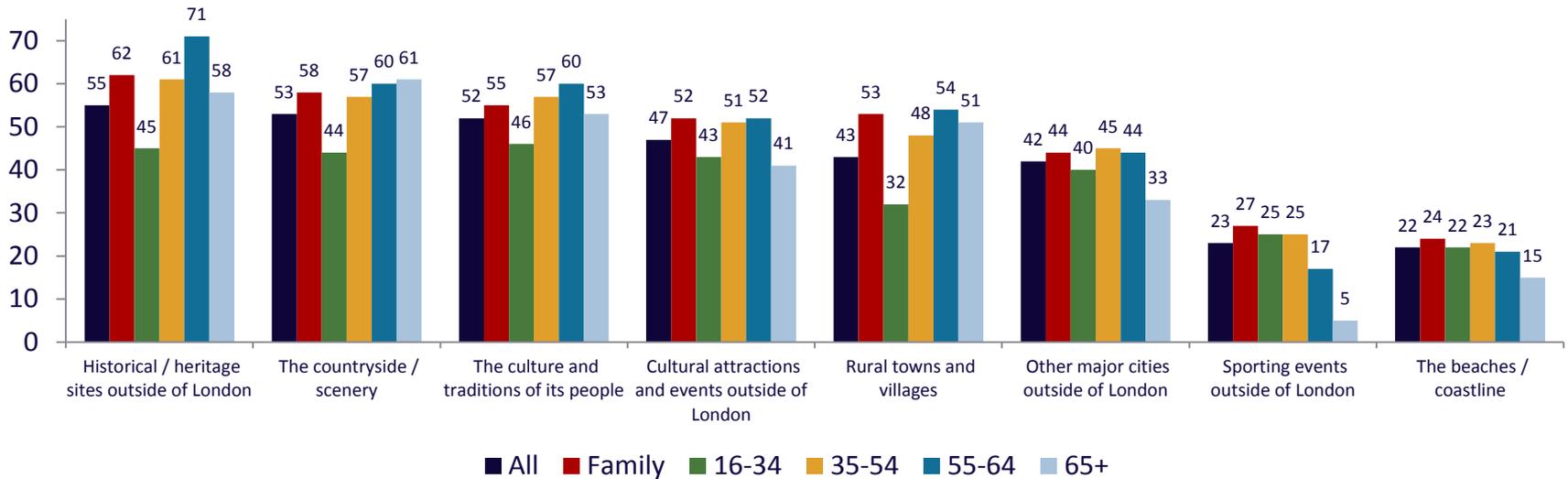
Overall, awareness of ‘the beaches/coastline’ is the lowest (17% aware, rising to 25% amongst families). Awareness of Britain’s ‘culture and traditions’ is highest, followed by ‘historical/heritage sites outside of London’ and ‘the countryside/scenery’.

Overall, the understanding of Britain’s offer outside of London varies across life-stages. 16-34 year olds (millennials) exhibit the lowest levels of understanding, those aged 35+ and families the highest.

Interest in visiting GB places/activities

Source: VisitBritain Beyond London study

(% 'have lots of interest' in visiting each activity/place)

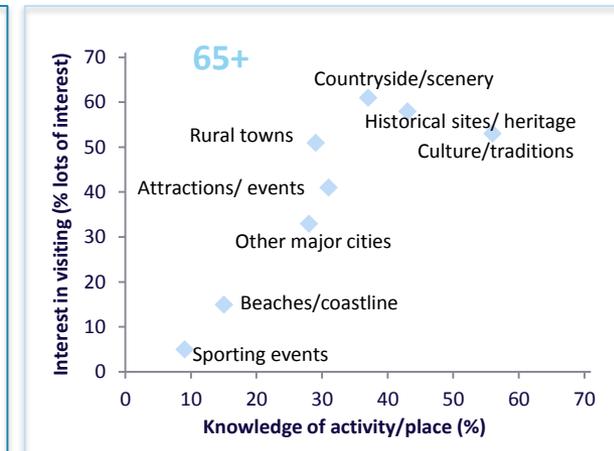
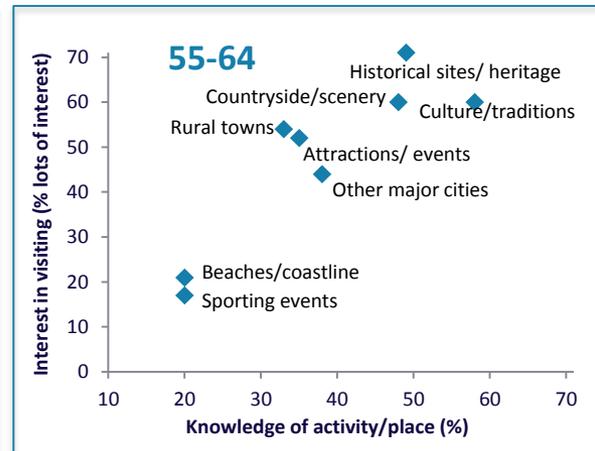
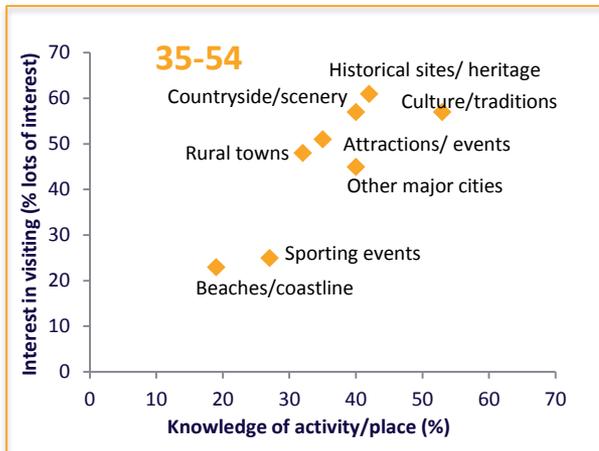
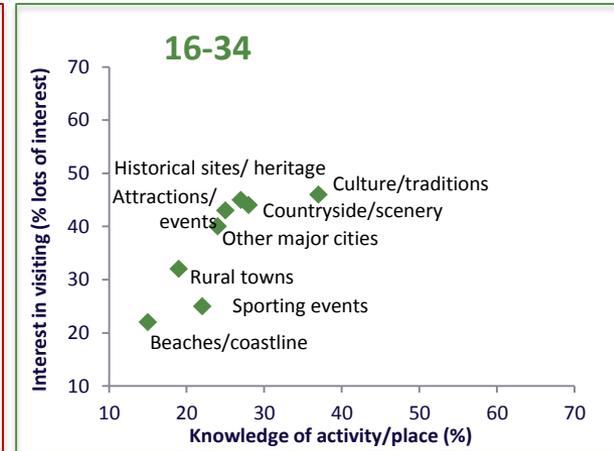
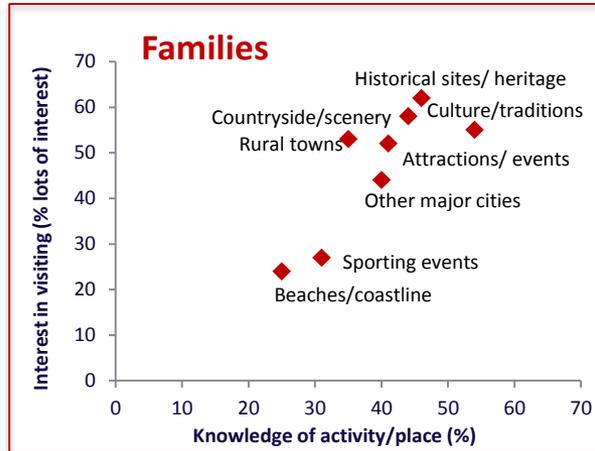
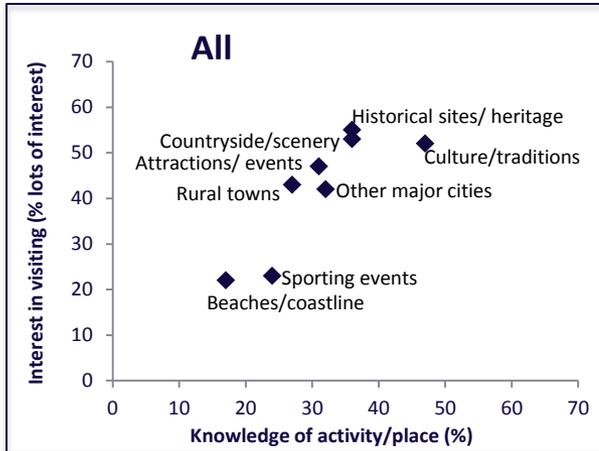


Desire to visit places/do activities outside of London is generally higher than awareness, although the extent of interest tends to correlate. Interest in visiting ‘the beaches/coastline’ is lowest followed by interest in ‘sporting events outside of London’.

There are some notable uplifts on awareness amongst life-stages. For example, despite significantly lower awareness of ‘other major cities outside of London’, 16-34 year olds are almost as likely as average to be interested in visiting. Culture, tradition and heritage tend to appeal more to older age groups, in particular 55-64 year olds.

Summary: Awareness vs. interest in visiting GB places/activities

Source: VisitBritain Beyond London study



Rating of GB on the most important attributes vs other countries (% rating GB and other countries as ‘best place’ for each attribute*)

Source: Arkenford Research

Families

Most Important Attributes (For families)	GB score	Average of 6 countries	Best country for attribute	Worst country for attribute
Enjoy the landscape	28%	39%	Aus (63%)	Ger (25%)
Have fun and laughter	16%	22%	Aus (43%)	Neth (12%)
See famous sites/places	50%	45%	Fr (63%)	Neth (20%)
Be physically healthier	30%	36%	Aus (56%)	Neth (25%)
Experience new things	29%	34%	Aus (47%)	Neth (20%)

Aged under 35

Most Important Attributes (For under 35s)	GB score	Average of 6 countries	Best country for attribute	Worst country for attribute
Have fun and laughter	21%	22%	USA (33%)	Neth (11%)
Enjoy the landscape	30%	40%	Aus (64%)	Ger (20%)
Experience new things	29%	35%	Aus (50%)	Neth (23%)
Experience a wow factor	33%	36%	Aus (49%)	Neth (16%)
See famous sites/places	49%	43%	Fr (61%)	Neth (18%)

Amongst families and Under 35s, Britain is rated below average on the majority of metrics they regard as being most important to them. However, it does not score the lowest on any, and is rated higher than average across both groups for offering ‘famous sites and places’. Families and under 35s tend to regard Australia as the best place for the majority of attributes – France and the USA also featuring. The Netherlands tends to receive the fewest selections as ‘best place’.

*Question asked respondents to indicate which country they felt was the ‘best place’ for a range of attributes from a selection of six countries (Great Britain, France, Italy, Australia, USA, Germany and Netherlands). The attributes shown below are the top five most important for each life-stage (as ranked on slides 12-13).

Rating of GB on the most important attributes vs other countries (% rating GB and other countries as ‘best place’ for each attribute*)

Source: Arkenford Research

Aged 35-50

Most Important Attributes (For 35-50 year olds)	GB score	Average of 6 countries	Best country for attribute	Worst country for attribute
Enjoy the landscape	25%	38%	Aus (65%)	Neth (24%)
Have fun and laughter	16%	23%	Aus (42%)	Neth (12%)
See famous sites/places	51%	45%	Fr (64%)	Neth(17%)
Soak up the atmosphere	21%	28%	Aus (50%)	Neth (6%)
Enjoy local food & drink	22%	34%	It (68%)	Neth (11%)

Aged 51-64

Most Important Attributes (For 51-64 year olds)	GB score	Average of 6 countries	Best country for attribute	Worst country for attribute
Enjoy the landscape	21%	30%	Aus (45%)	Neth (18%)
See famous sites/places	36%	36%	It (60%)	Neth (14%)
Have fun & laughter	11%	16%	Aus (40%)	Ger (5%)
Soak up the atmosphere	12%	21%	Fr (31%)	Neth (11%)
History/ historic sites	37%	34%	It (71%)	Aus (10%)

35-50 and 51-64 year olds are all less likely than average to rate Britain as the ‘best place’ to ‘enjoy the landscape and scenery’ – their most important motivation when choosing a holiday. Conversely, both rate it as high or higher than average as a place to ‘see famous sites/places’.

Britain’s ‘history/historic sites’ are rated higher than average for 51-64 year olds – an attribute that is more important to them than younger age groups.

*Question asked respondents to indicate which country they felt was the ‘best place’ for a range of attributes from a selection of six countries (Great Britain, France, Italy, Australia, USA, Germany and Netherlands). The attributes shown below are the top five most important for each life-stage (as ranked on slides 12-13).

Rating of GB on the most important attributes vs other countries (% rating GB and other countries as ‘best place’ for each attribute*)

Source: Arkenford Research

65+ year olds

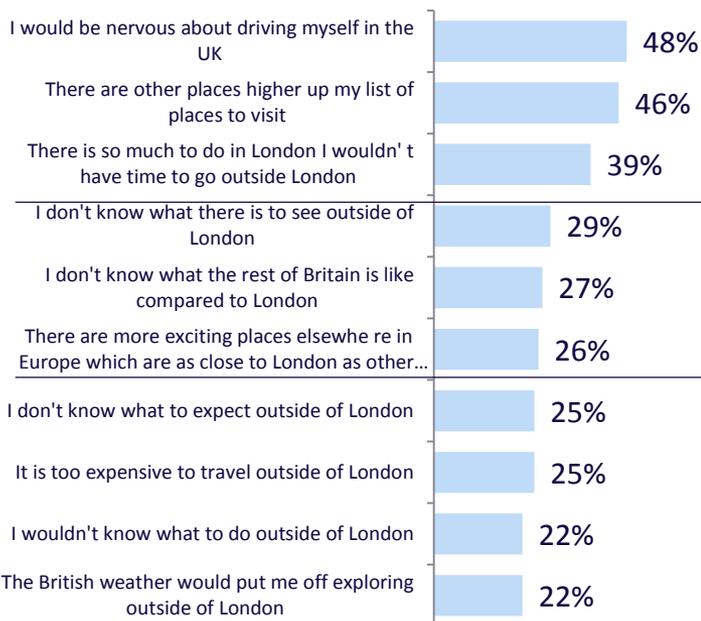
Most Important Attributes (For 65+ year olds)	GB score	Average of 6 countries	Best country for attribute	Worst country for attribute
Enjoy the landscape	21%	30%	Aus (46%)	Neth (19%)
See famous sites/places	48%	44%	USA (64%)	Neth (16%)
History/ historic sites	51%	33%	It (59%)	Neth (12%)
Have fun & laughter	16%	14%	It (25%)	Neth (1%)
Broaden my mind	32%	29%	USA (41%)	Neth (8%)

65+ year olds rate Britain as higher than average for three of the five most important attributes they look for in a holiday including ‘seeing famous sites/places’, ‘history/historic sites’ and as a place ‘to broaden my mind’. Notably, 65+ year olds’ rating of Britain as ‘the best place’ for ‘history/historic sites’ is only marginally lower than Italy – the highest rated country for this attribute.

Question asked respondents to indicate which country they felt was the ‘best place’ for a range of attributes from a selection of six countries (Great Britain, France, Italy, Australia, USA, Germany and Netherlands). The attributes shown below are the top five most important for each life-stage (as ranked on slides 12-13).

Agreement with reasons for not visiting outside of London

Source: VisitBritain Beyond London study



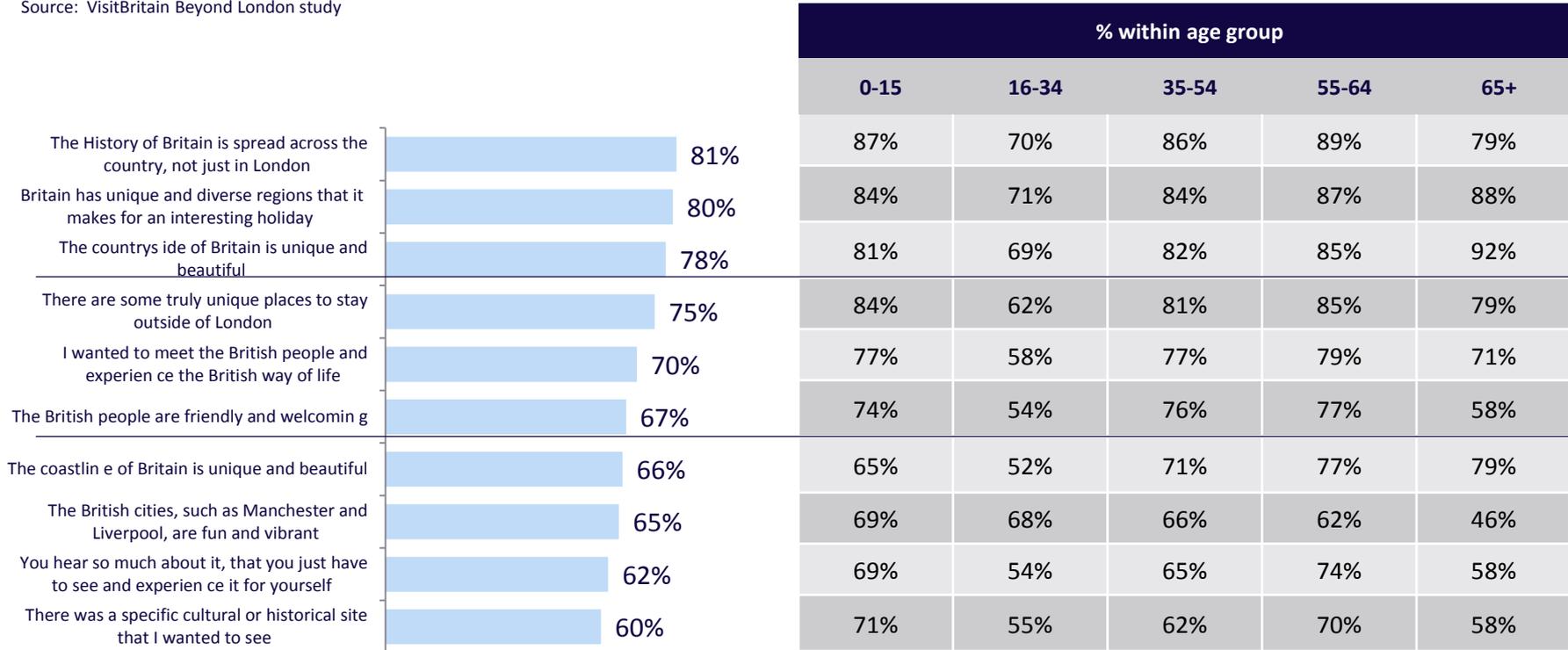
	% within age group				
	0-15	16-34	35-54	55-64	65+
I would be nervous about driving myself in the UK	45%	45%	51%	41%	64%
There are other places higher up my list of places to visit	43%	48%	44%	44%	50%
There is so much to do in London I wouldn't have time to go outside London	36%	37%	41%	44%	36%
I don't know what there is to see outside of London	30%	37%	25%	17%	11%
I don't know what the rest of Britain is like compared to London	27%	30%	24%	32%	18%
There are more exciting places elsewhere in Europe which are as close to London as other...	23%	29%	26%	22%	14%
I don't know what to expect outside of London	22%	32%	22%	17%	14%
It is too expensive to travel outside of London	25%	32%	22%	22%	11%
I wouldn't know what to do outside of London	25%	27%	20%	15%	7%
The British weather would put me off exploring outside of London	26%	25%	22%	22%	14%

Overall, worries about driving in Britain was the main barrier to visiting outside of London, particularly amongst those aged 65+. There being 'other places higher up the list' and 'there being so much to do in London'. Lack of understanding of what there is outside of London was also important.

For 16-34 year olds, the appeal of other places was the most important reason, as were a number of reasons highlighting low awareness of the offer outside of London. Notably, 'not knowing what there is to see outside of London', and 'there are more exciting places elsewhere in Europe' were significantly more likely to be mentioned than other age groups.

Reasons for visiting outside of London

Source: VisitBritain Beyond London study



Of those that have visited outside of London, Britain’s history was regarded as the main reason for doing so, followed by its ‘unique and diverse regions’ and ‘unique and beautiful’ countryside.

Those aged over 35 were significantly more likely to cite history, diverse regions and beautiful countryside than 16-34 year olds. 16-34 year olds were significantly more likely to cite fun and vibrant cities.



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