



Britain and Competitors

Research Background

What?

Understand the overall holiday decision-making process across key inbound markets, focussing on:

- General holiday duration of travellers
- Knowledge of and likelihood to visit Britain
- Holiday research and planning process (motivators, influencers, duration)
- Holiday booking process (channels and devices used to book different elements of a holiday)

Who?

- 18+ year old adults who have taken a holiday of at least 2 nights in a foreign country in the last 3 years. Must have been solely or jointly responsible for deciding their last holiday destination. Must be nationals of the country and are residing in that country for the last 12 months
- Equal split of past visitors to Britain and those considering to visit Britain in the next 5 years

Where?

20 key inbound markets *(see slide 5 for more details of countries)*

How?

Interviews conducted online in spring 2016

This research was conducted in 20 countries

LONG HAUL



	New Zealand (NZ)	USA (US)	Canada (CA)	Australia (AU)	Brazil (BR)	Russia (RS)	India (IN)	China (CH)	Japan (JP)	South Korea (SK)	Saudi Arabia (SA)	UAE (UA)
Sample size	550	600	550	600	500	500	600	500	450	500	350	255

SHORT HAUL



	Denmark (DM)	Sweden (SW)	Norway (NW)	Italy (IT)	Germany (GE)	France (FR)	Spain (SP)	Netherlands (NE)
Sample size	500	500	500	600	554	600	600	500

Terminology:

Visitors = Those who have visited Britain for a holiday of at least 2 nights within the last 3 years.

Considerer = Those who have not visited Britain within the last 3 years, but would consider visiting within the next 5 years.

About This Report

- **This report is the first of three.** It looks at knowledge of, and interest in Britain compared to its competitive set. The second report, Researching and Planning a Holiday, provides information about motivations, information sources, and timings for the planning process. The third report, Booking a Holiday, provides information about booking channels and websites, and also about which trip elements are booked in advance of travel.
- **Markets:** The analysis often starts off looking at overall findings for the total sample as well as Long Haul and Short Haul markets (defined in the previous slide) before looking at market level details.
- **Appendix:** For many sections, more detail by market is available in an Appendix at the end of the report.
- **Base:** Each slide gives details on the base for each question. Some questions were asked to Visitors (respondents who have previously visited Britain), some to Considerers (those who would consider visiting Britain in the next five years) and some to both.
- Other reports can be downloaded here: <https://www.visitbritain.org/visitor-characteristics-and-behaviour>

What will we cover within 'Britain & Competitors' section?

This section focusses on holidays in general and also Britain specifically as a holiday destination. We will cover the following questions:

1. How long do visitors usually travel to Britain for? And with whom?

- a. **How many holidays have travellers taken in the last 3 years?**
Number and length of trips; differences by markets if applicable
- b. **For how long have past visitors travelled to Britain for a holiday?**
Length of last holiday to Britain; whether it was part of a multi-country trip
- c. **Who are likely to take shorter or longer trips to Britain?**
Demographic and market differences
- d. **When on holiday (to Britain or generally), who do people travel with?**
Breakdown of different travel partners; differences by markets if applicable

2. What are the alternative destinations to Britain?

- a. **What alternative destinations did past visitors consider when booking a holiday to Britain?**
Which countries are more of a competition for Britain when it comes to holidays?
Top alternative destinations to Britain; differences by markets

3. Do people have similar knowledge for Britain as for competitors? How likely are travellers to visit Britain in the future?

- a. **How much do considerers visiting Britain feel they know about Britain as well as main competitors?**
Level of 'high'/'medium' knowledge for Britain & key competitors; differences by markets
- b. **What is the likelihood of people visiting Britain in the next 5 years?**
Overall breakdown of likelihood scale (Very and somewhat likely to visit) by markets compared against global averages

#1 SUMMARY



How long do visitors usually spend in Britain and who do they travel with?

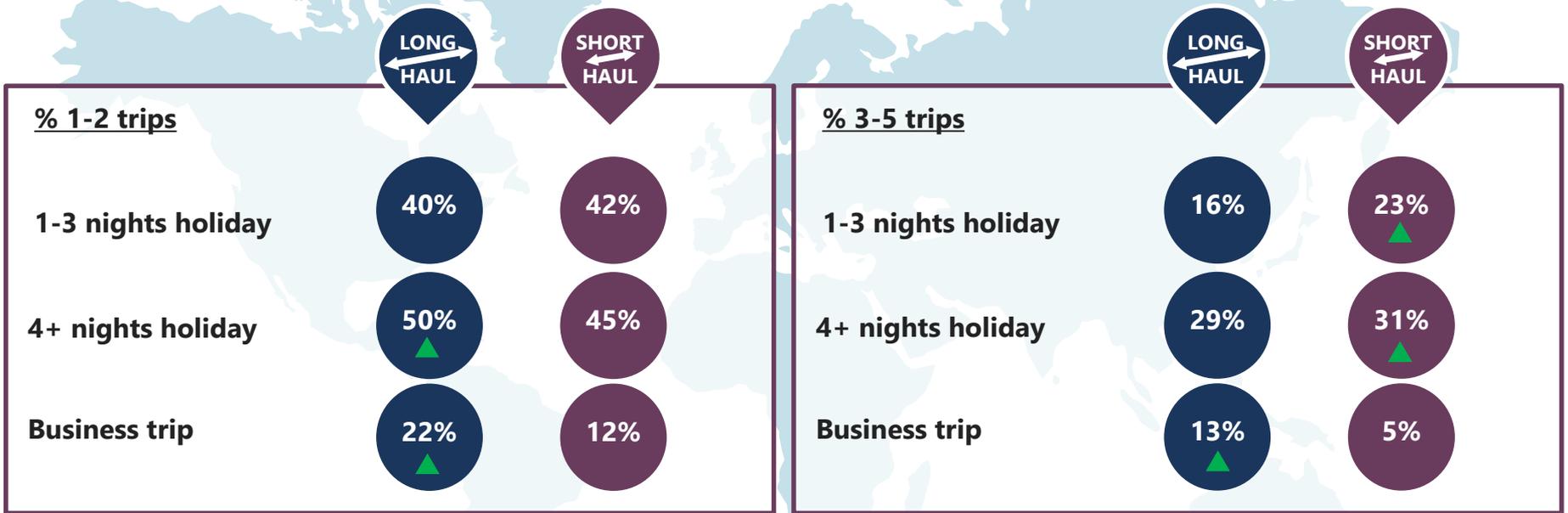
- Overall, **travellers take more holidays of 4+ nights** than 1-3 nights. Short haul markets take shorter duration trips more often than long haul markets, with 23% of respondents from short haul markets taking 3-5 such trips in the past 3 years, while long haul markets take more longer duration holidays and business trips.
- Holidays to Britain:
 - **Just under half of holidays to Britain are for 4-7 nights.** In general, short haul markets are likely to take more shorter trips (possibly for city breaks) whereas long haul are more likely to take more holidays of 8+ nights.
 - Within this, **Advanced Asia** are more likely to take a short holiday to Britain (1-7 nights, possibly as part of a multi-country trip) whereas **Gulf and NZ / AUS** are more likely to take a longer trip (8+ nights).
 - Travellers from France, Spain, Netherlands and Sweden are more likely to have taken a short holiday (1-7 nights) to Britain whereas Germans are more likely to have taken a longer trip (8+ nights)
- **Younger travellers** (18-34s) are more likely to have taken a short holiday to Britain, whereas **parents** are more likely to have taken a longer trip
- **Spouse/partners** are the **predominant companions** when travellers have visited Britain, with 64% having travelled with their partner. **Younger travellers** are **more likely to travel on their own or with friends** than those in the middle or older age brackets whereas **35-54s are the most likely to travel with children.**

Long haul travellers who have taken 1-2 trips, are most likely to have spend more than 4 nights in their destination. Short haul travellers are more evenly split between 1-3 night trips and 4+ night trips.

Q: Thinking about last 3 years, how many trips of each type have you taken?

Base: Visitors & Considerers

% travellers who have taken trips of each kind



4+ nights high for: NZ (60%), Australia (56%)

Business trip high for: India (34%), China (32%)

Business trip high for: India (20%), China (18%), Saudi Arabia (21%)

4+ nights high for: Netherlands (39%)

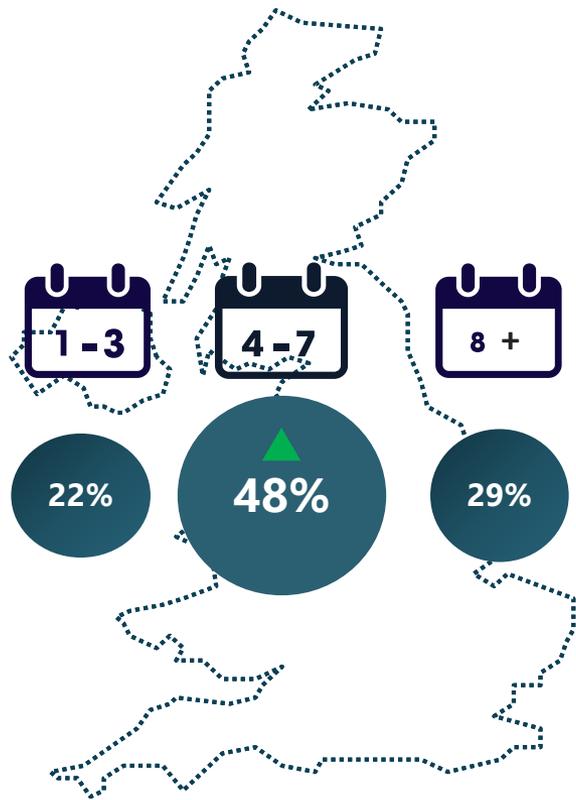
Note: Market level data in appendix

▲▼ significantly higher/ lower @ 95% confidence level

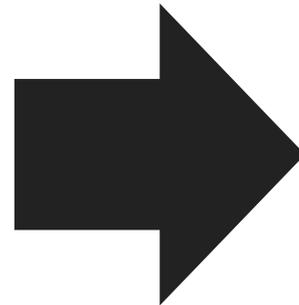
Just under half of holidays to Britain are for 4-7 nights. This is highest for short haul markets, where over half are for this duration. Over a third (38%) of long haul markets visited the UK for more than 8 nights.

Q: How long was your holiday to Britain?

Base: Visitors



Length of Holiday to Britain (nights)



	LONG HAUL	SHORT HAUL
1-3 nights	16%	29% ▲
4-7 nights	45%	53% ▲
8+ nights	38% ▲	17%

Note: Market level data in appendix

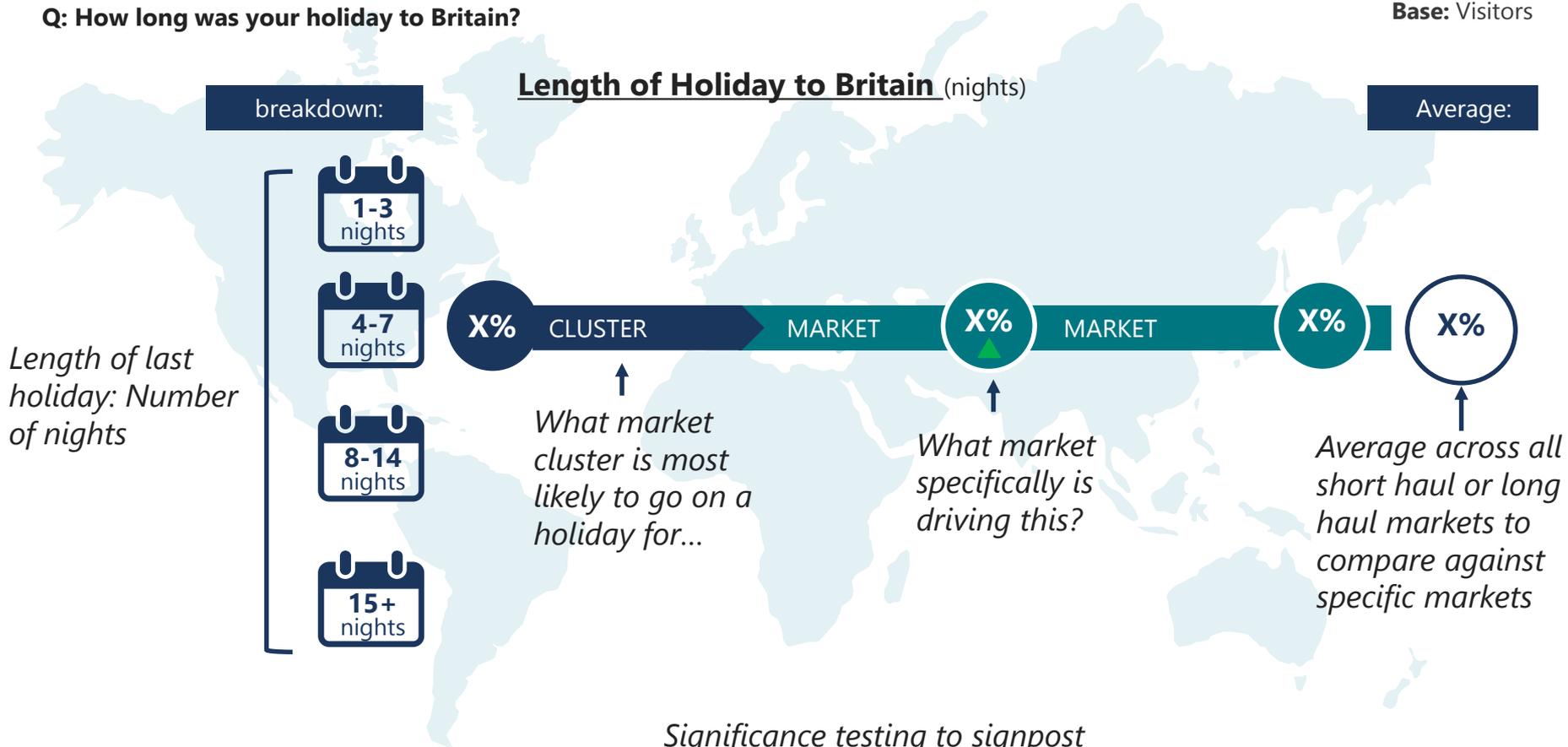
QC8 How long was your holiday to Britain?
Base: Visitors (5700), Long haul (6600), Short haul (4800)

▲▼ significantly higher/ lower @ 95% confidence level

The following 2 slides will be showing a breakdown of the length of holiday (in nights) to Britain, split by which market cluster is most likely to take a holiday of that duration – any specific markets driving that will be called out. Both slides are based on those who have visited Britain only.

Q: How long was your holiday to Britain?

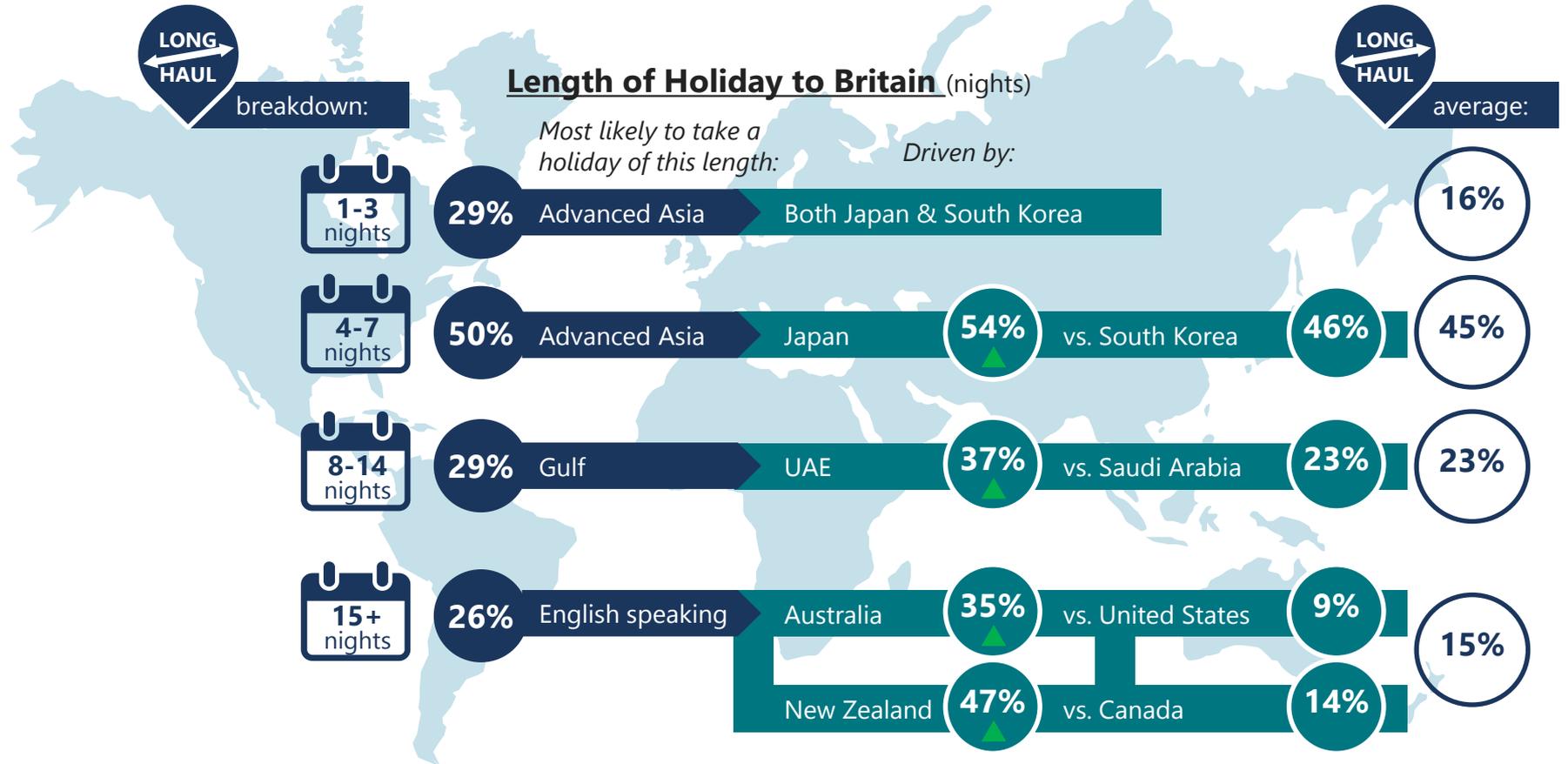
Base: Visitors



Amongst long haul markets, Advanced Asia have had more shorter breaks to Britain whereas travellers from Gulf markets and New Zealand/Australia have taken longer trips.

Q: How long was your holiday to Britain?

Base: Visitors



Note: Market level data in appendix

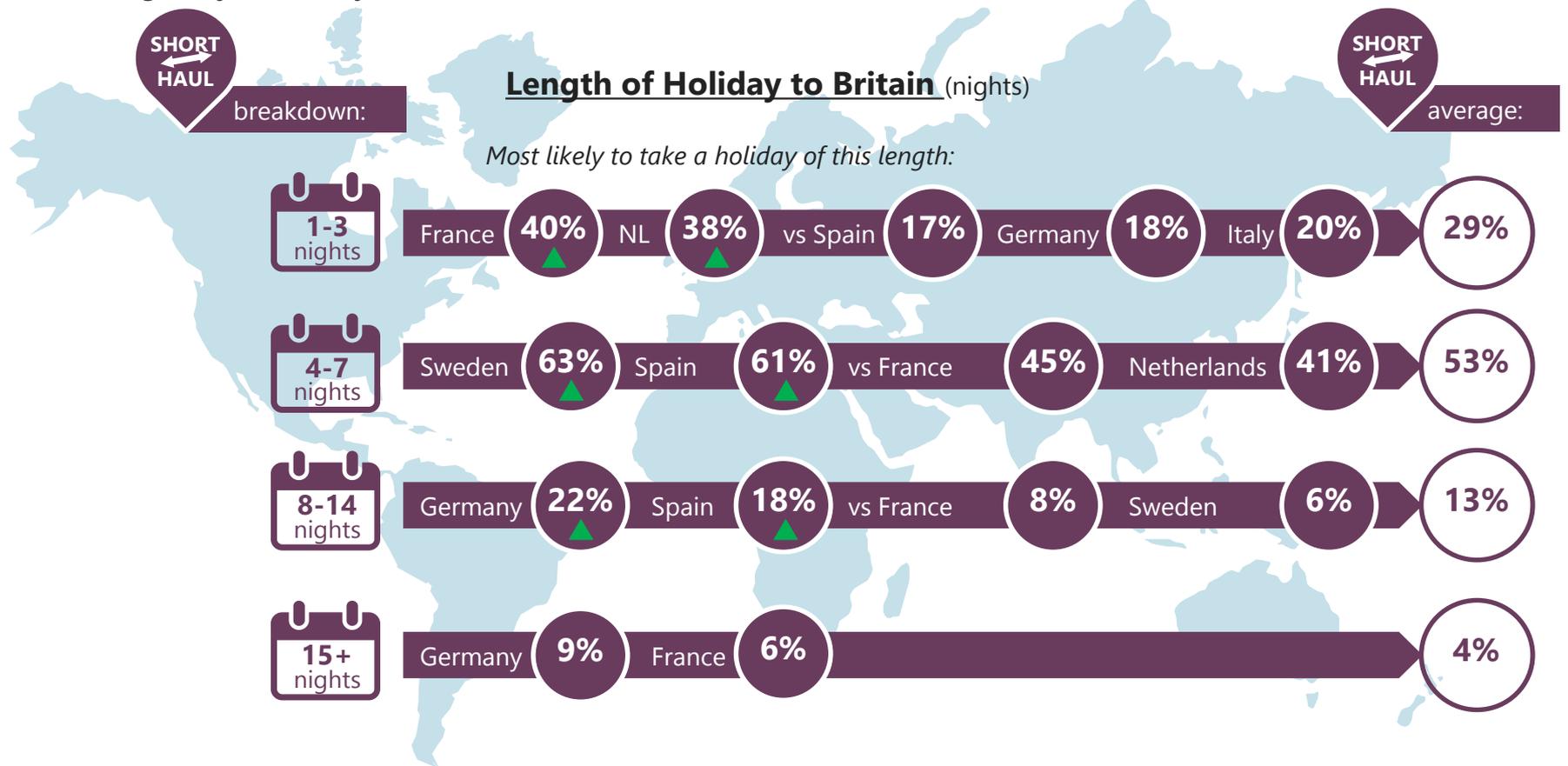
QC8 How long was your holiday to Britain?

Base: Visitors Advanced Asia (1200), Gulf (600), English speaking (2400), Japan (300), South Korea (300), UAE (175), Saudi Arabia (125), New Zealand (300), Australia (300), USA (300), Canada (300)

Among short haul markets, more visitors from France, Spain, Netherlands and Sweden have visited Britain for fewer than 7 nights, while Germans have taken more longer breaks.

Q: How long was your holiday to Britain?

Base: Visitors



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Note: Market level data in appendix

QC8 How long was your holiday to Britain?

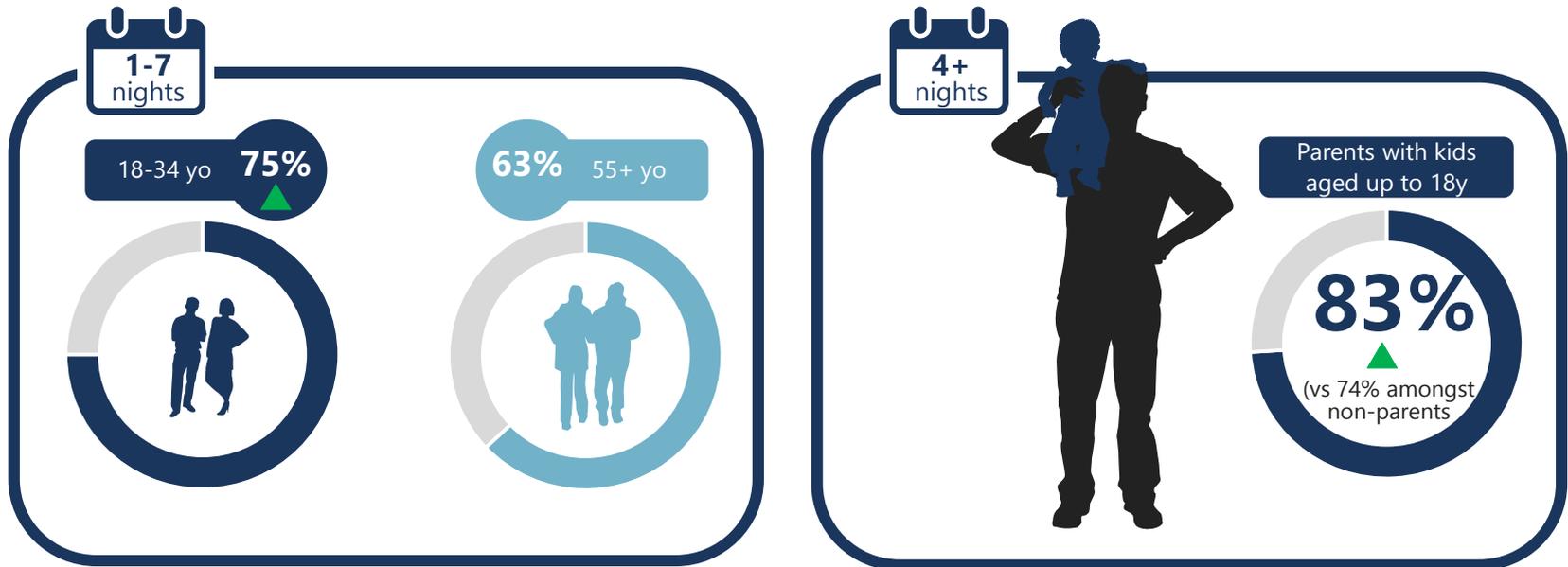
Base: Visitors (300) for all countries

Compared to those aged 55+, 18-34s are more likely to take trips lasting a week or less. Parents are more likely than non-parents to take longer trips.

Base: Visitors

Q: How long was your holiday to Britain?

Length of Holiday to Britain (nights)



Note: Market level data in appendix

▲ ▼ significantly higher/ lower @ 95% confidence level

QC8 How long was your holiday to Britain?

Base: Visitors 18-34 (3176), 55+ (1505), Parents (2316), Non Parents (3384)

Just under two thirds of travellers have visited Britain with their spouse or partners, one fifth visited with friends, another fifth with their children, and 1 in 10 by themselves.

Base: Visitors

Q: Thinking about your holiday to Britain, who did you go with?

Travel companion when visited Britain



Spouse/ Partner

64%



Children under 16

19%

Similar trend for short haul and long haul.

Although short haul also travel with other family members or with friends



On your own

10%



With friends

18%

Note: Market level data in appendix

▲ ▼ significantly higher/ lower @ 95% confidence level

QC9 Thinking about your holiday to Britain, who did you go with?

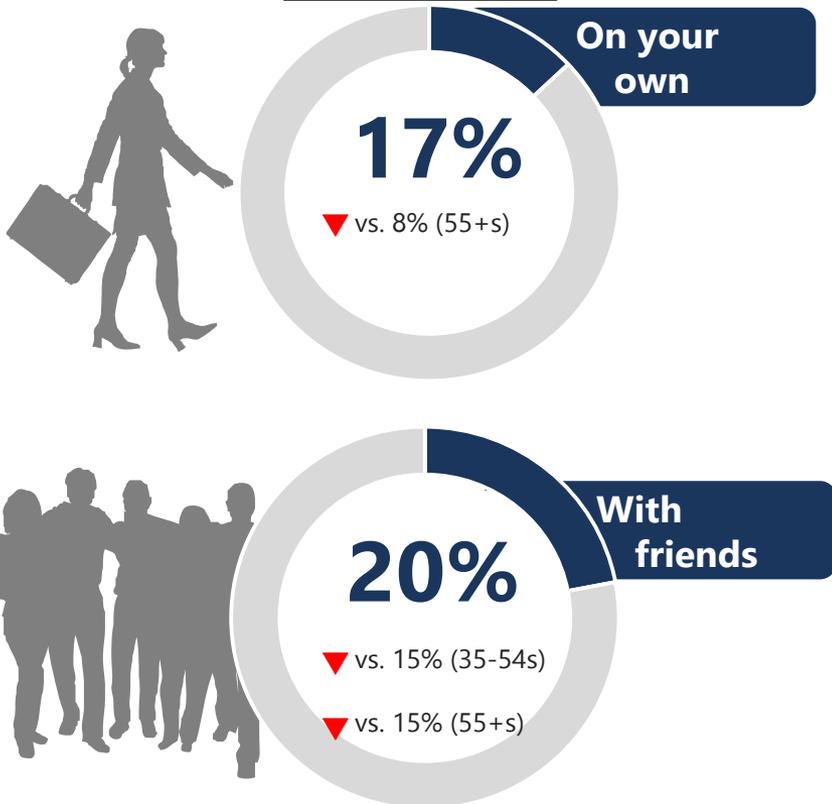
Base: Visitors (5700)

Those aged 18-34 are more likely to travel on their own or with friends. A quarter of those aged 35-54 travelled to Britain with their children.

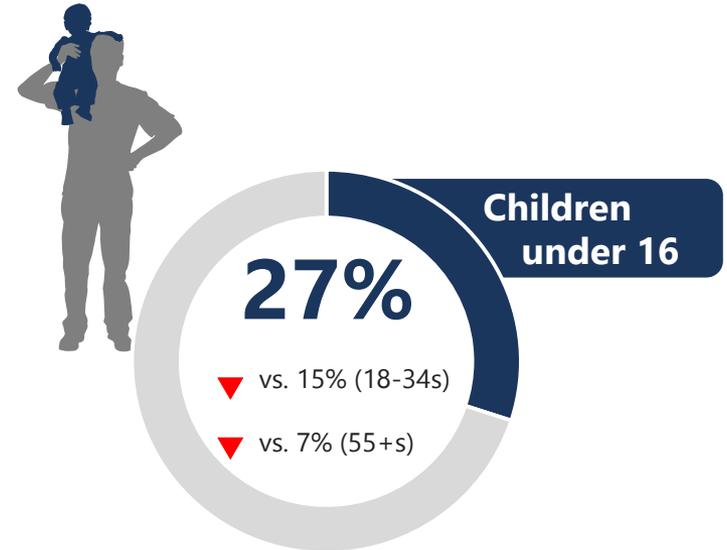
Base: Visitors

Q: Thinking about your holiday to Britain, who did you go with?

18-34 years



35-54 years



Note: Market level data in appendix

QC9 Thinking about your holiday to Britain, who did you go with?
Base: Visitors (5700), Parents children under 18 - 34 (2285), 35-54s (2064), 55+ (1350)

▲ ▼ significantly higher/ lower @ 95% confidence level

#2 SUMMARY



What are the alternative destinations to Britain?

- **France is Britain's key competitor** when travellers are considering alternative destinations to Britain among many short and long haul visitors
- **Germany and Italy follow France** as the most considered alternative **amongst long haul** visitors
- **Ireland is the second most considered** destination amongst **short haul**
- Short haul visitors have a higher tendency to have **only considered Britain** – i.e. to not have considered any other competing destinations on their most recent holiday to Britain
- Amongst short haul markets, **German travellers are less likely to choose France as the main competitor to Britain** as other markets (higher preference for Ireland)
- Whilst many respondents from long haul markets consider France, Germany and Italy, **travellers from New Zealand, UAE and India have some other holiday preferences** – Switzerland is strongly considered for both India and UAE whereas Italy is the main competitor for travellers from New Zealand

Among long haul visitors, France is the most considered alternative destination to Britain. Germany and Italy are second and third, with nearly a third of people claiming they had considered them

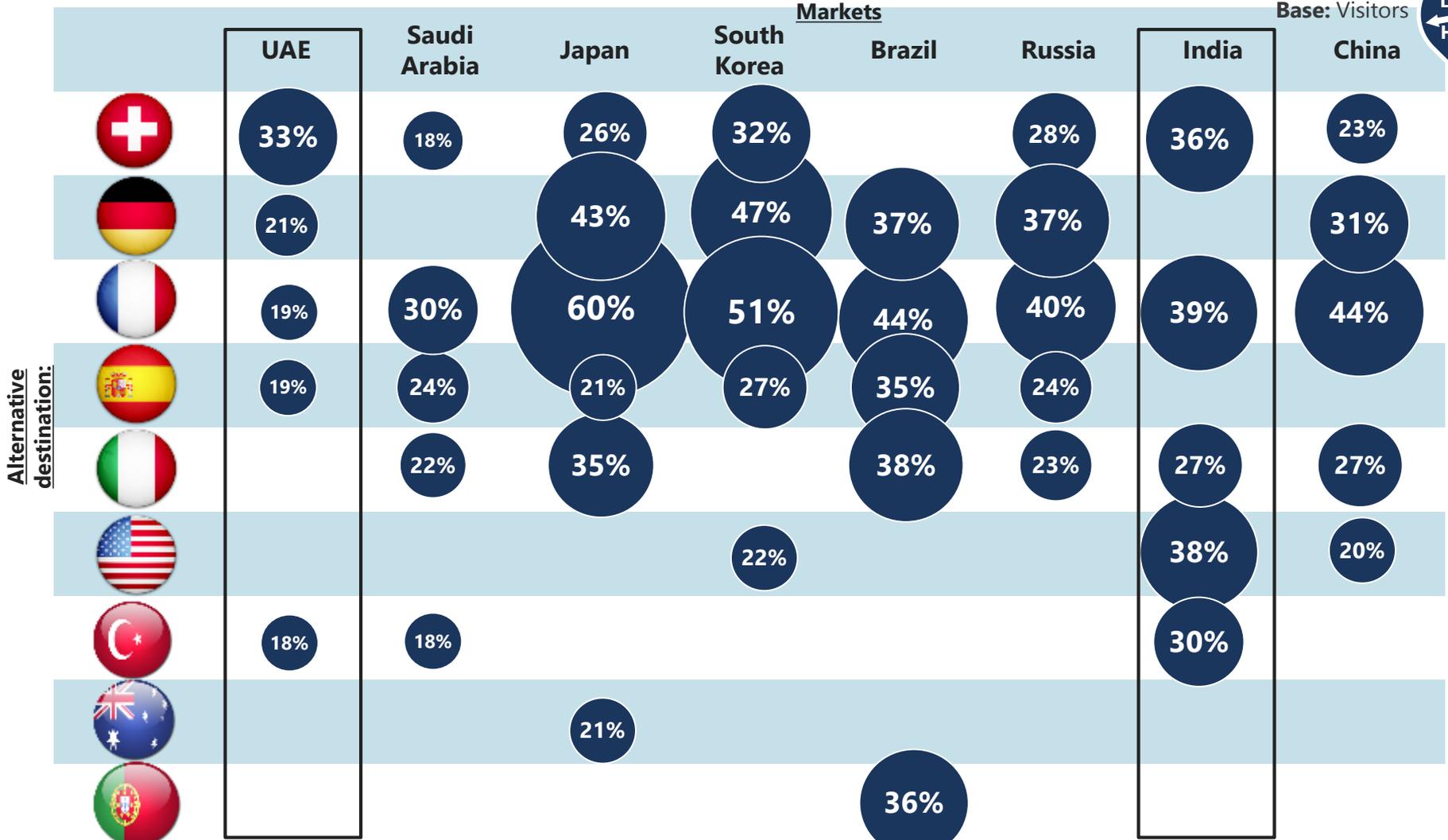
Base: Visitors

Q: When you chose to visit Britain on holiday, did you consider any of the below countries as an alternative destination for that trip?

Alternative destination to Britain when considering holiday location



France is Britain's biggest competitor for visitors from Japan, South Korea, Brazil, Russia, India and China. After France, Germany and Italy are the next closest competitors and for the UAE Switzerland is an alternative.



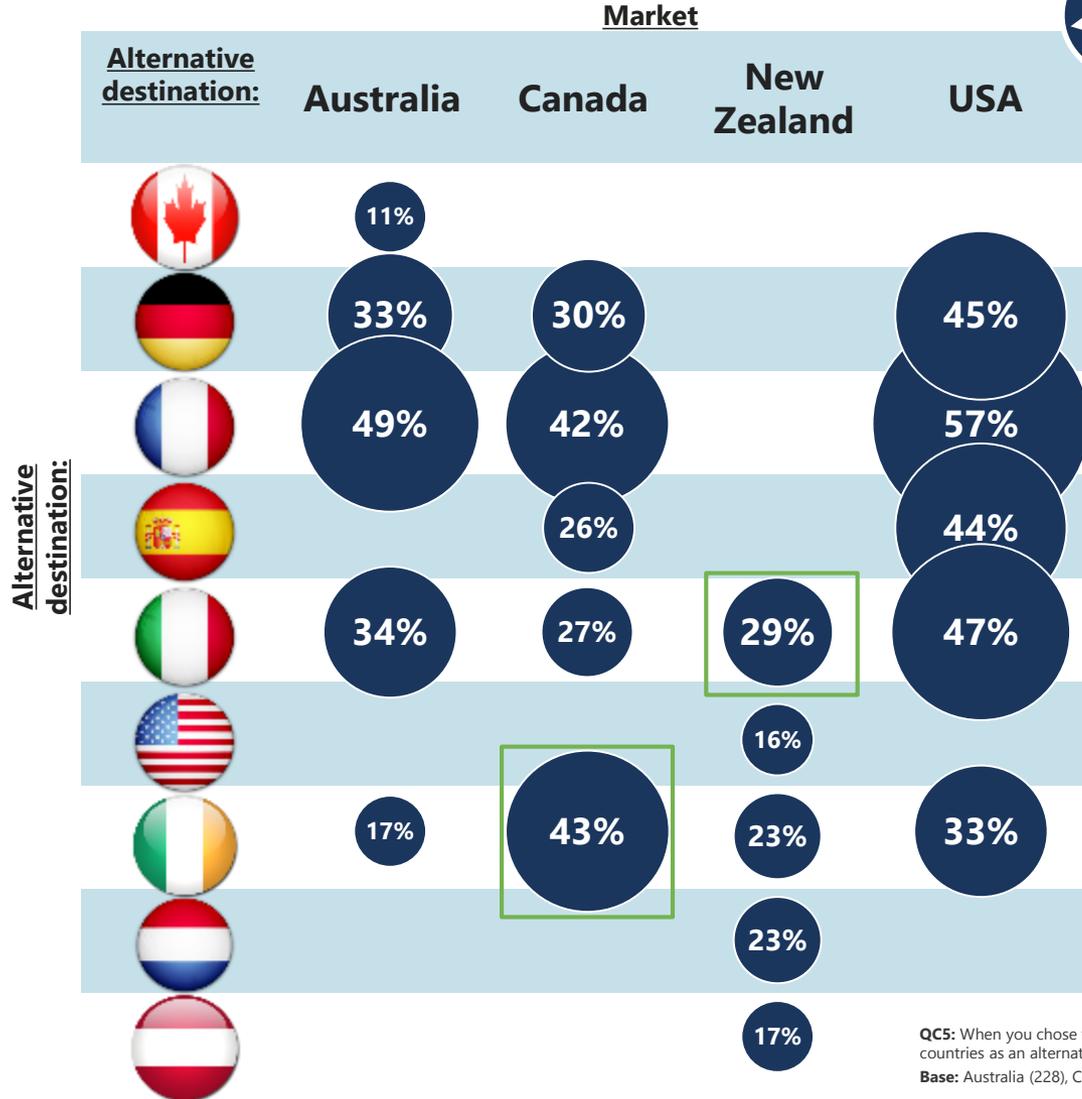
QCS: When you chose to visit Britain on holiday, did you consider any of the below countries as an alternative destination for that trip?

Base: UAE (84), Saudi Arabia (115), Japan (159), South Korea (254), Brazil (264), Russia (191), India (219), China (260)

France is a strong competitor for Australian and USA visitors, however those from Canada are more likely to see Ireland as an alternative, and New Zealand are likely to consider Italy.



Base: Visitors

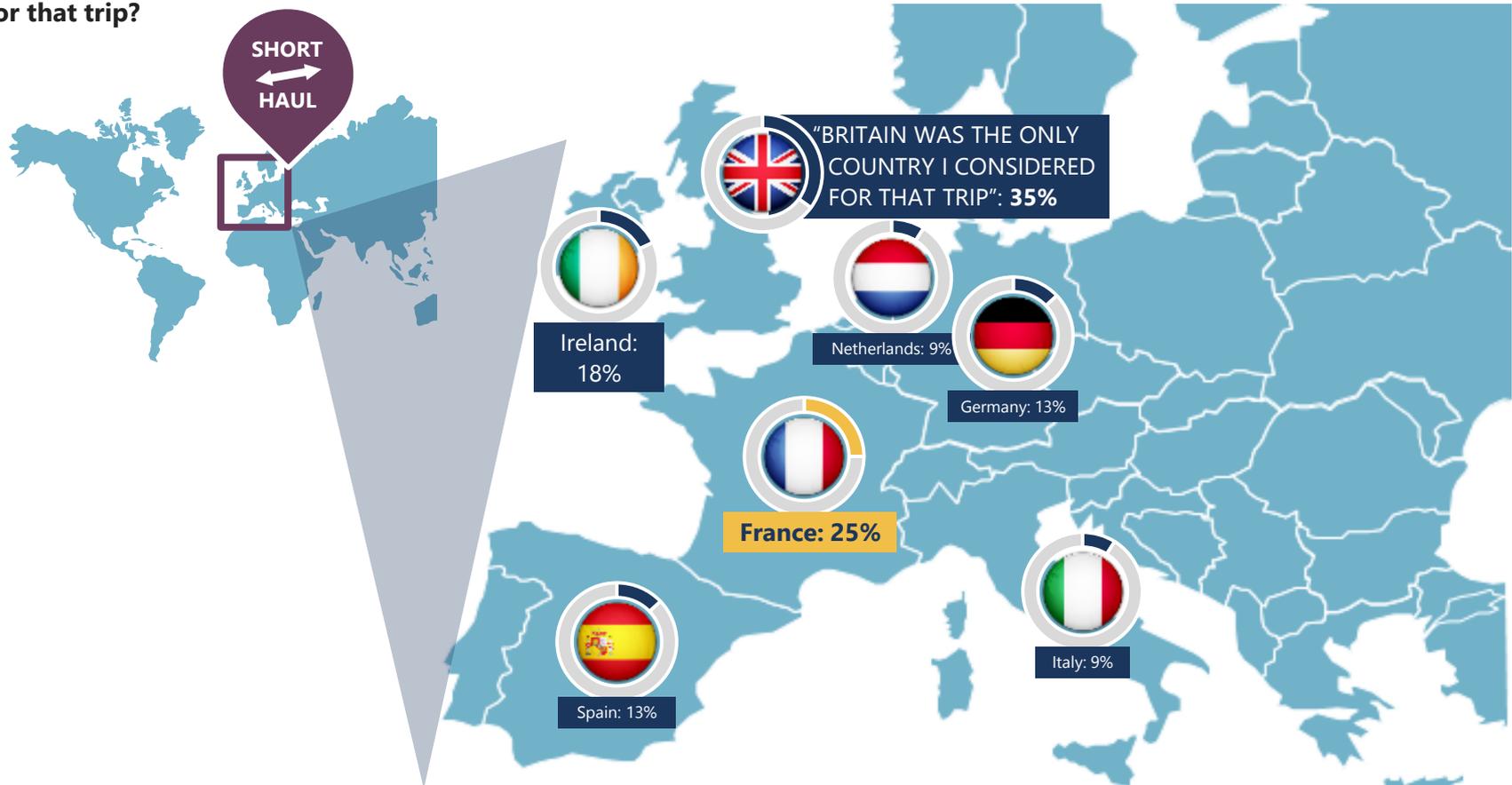


QC5: When you chose to visit Britain on holiday, did you consider any of the below countries as an alternative destination for that trip?
 Base: Australia (228), Canada (209), New Zealand (234), USA (219)

Short haul visitors are more likely to not have considered alternate destinations, with a third saying Britain was the only country they considered. France continues to be the main alternative destination considered by a quarter, followed by Ireland and then Germany.

Base: Visitors

Q: When you chose to visit Britain on holiday, did you consider any of the below countries as an alternative destination for that trip?



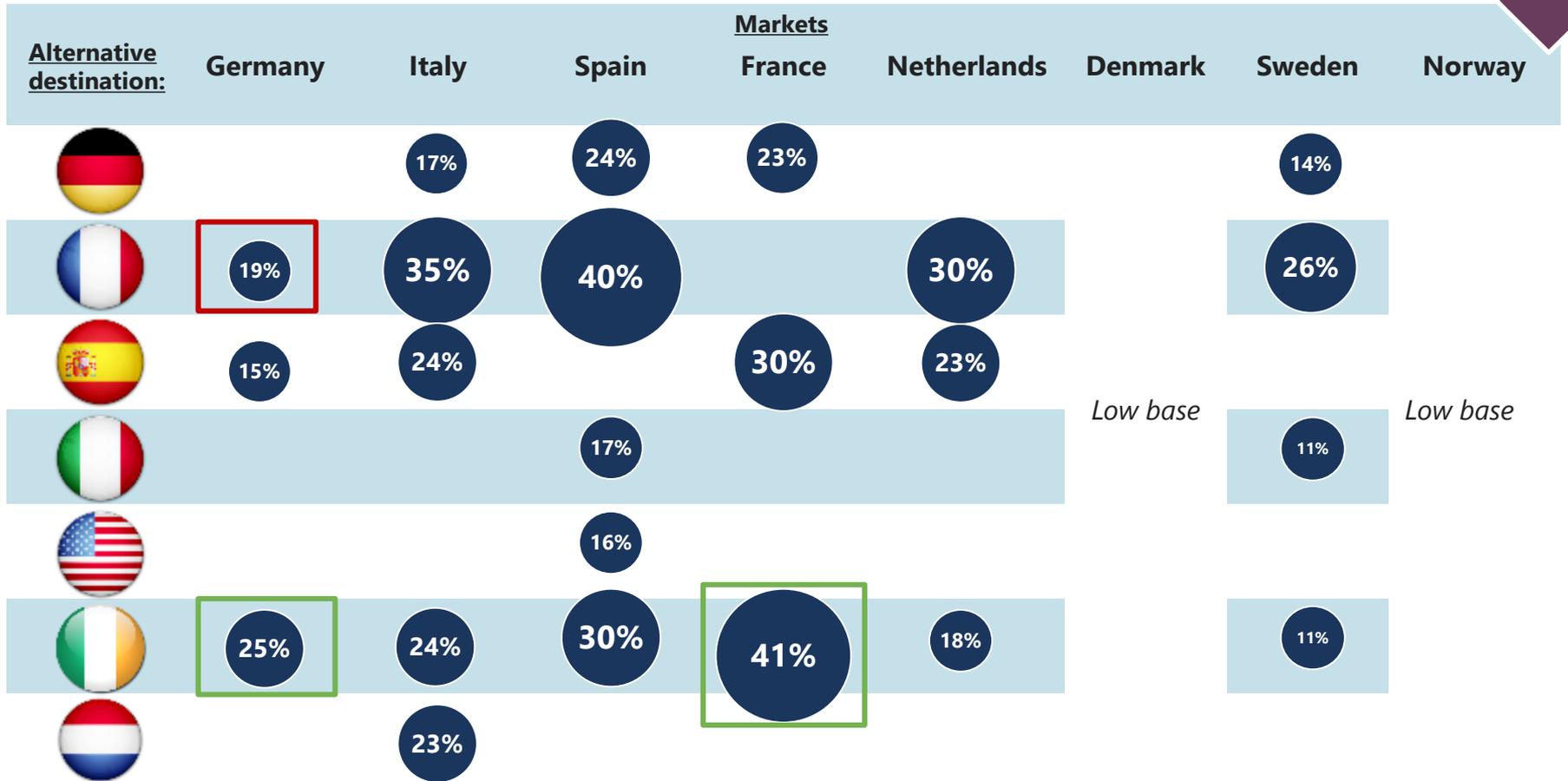
QCS: When you chose to visit Britain on holiday, did you consider any of the below countries as an alternative destination for that trip?

Base - Short haul visitors: 531

For short haul markets, France is the most likely alternative for those from Italy, Spain, Netherlands and Sweden whilst Ireland is the alternative considered for those from France and Germany.

Base: Visitors

SHORT
←→
HAUL



QC5: When you chose to visit Britain on holiday, did you consider any of the below countries as an alternative destination for that trip?
 Base – Germany (120), Italy (106), Spain (76), France (44), Netherlands (66), Sweden (52)

#3 SUMMARY

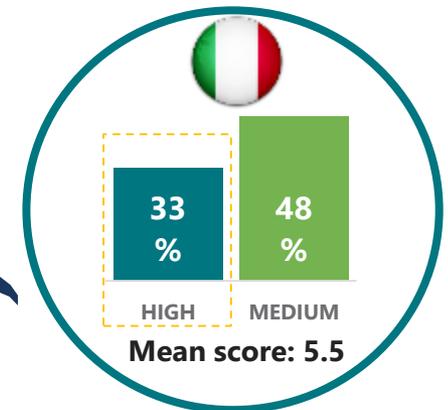
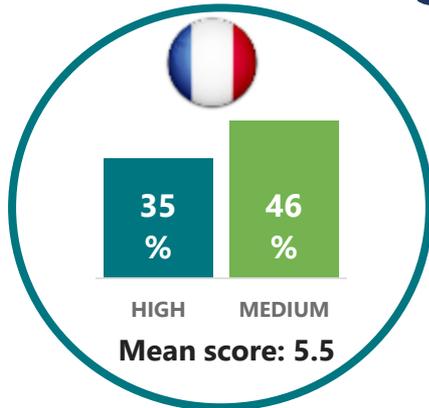
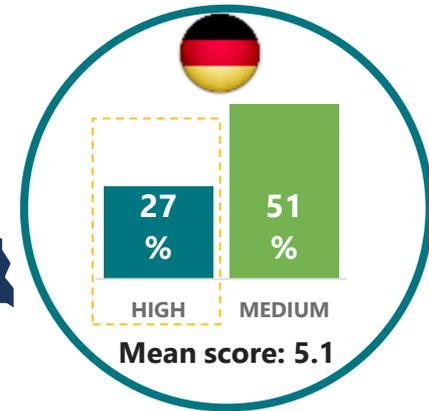
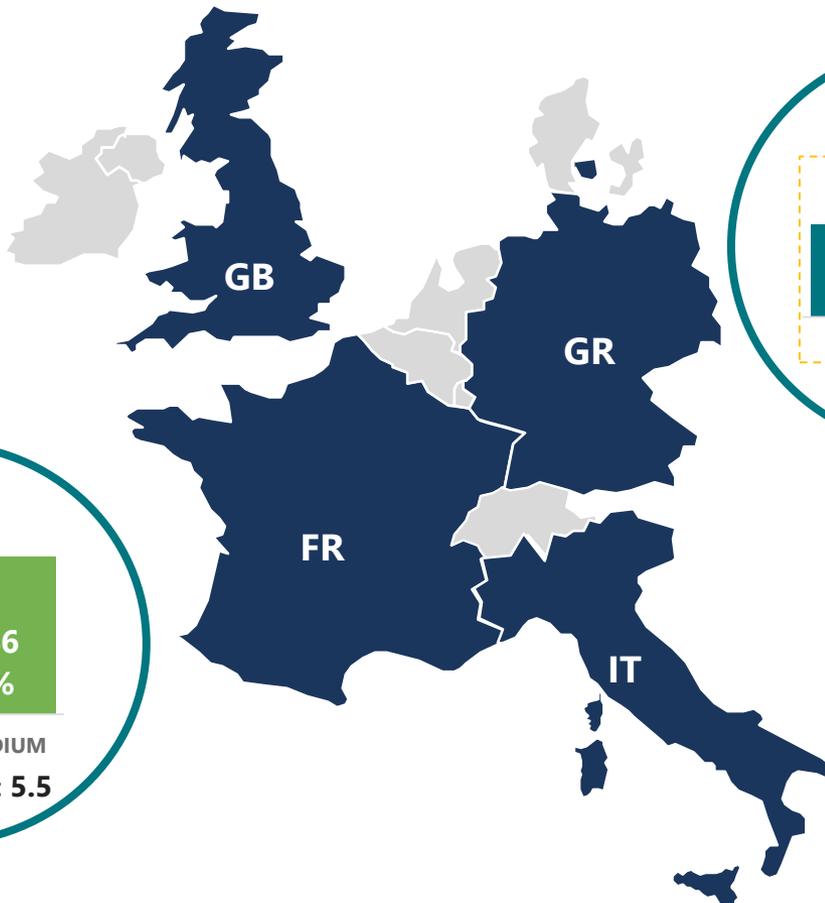


Do people have similar knowledge for Britain as for Competitors?

- Globally, **37% of those considering a holiday to Britain** say that they have a high knowledge of what to expect from a holiday to Britain. Travellers have **similar knowledge of Britain as they do of France**, although we see lower knowledge for Italy and especially Germany.
- **Considerers within short haul markets claim to have less knowledge of Britain** when compared to long haul markets. However, we see a **similar trend for other key competitors** (France, Germany and Italy).
- **Knowledge of Britain across most long haul markets is stronger** than average knowledge of all destinations with the exception of **Brazil who have a stronger knowledge of competing destinations**.
- **Knowledge of Britain in short haul markets is on par with average knowledge of competitor destinations** with the exception of **Italy & Spain who have stronger relative knowledge of Britain**.
- When asked about intent to visit in the next five years, **Considerers in long haul markets** have a **higher likelihood to visit Britain** when compared to short haul markets. **Canada, South Korea and Japan have the lowest likelihood** to visit Britain amongst long haul markets whereas **Nordics, Germany and Netherlands are not as strong** amongst short haul markets.

Among those considering visiting Britain, a third feel that they have a strong knowledge of what to expect from a holiday here. There are similar knowledge levels for France; however. Germany is a little less well known.

Q: How much do you feel you know about each of these countries as a holiday destination (scale of 1-9 where 1 is 'I know nothing at all' and 9 is 'I know exactly what to expect from a holiday to this country')?
Base: Considerers of each market



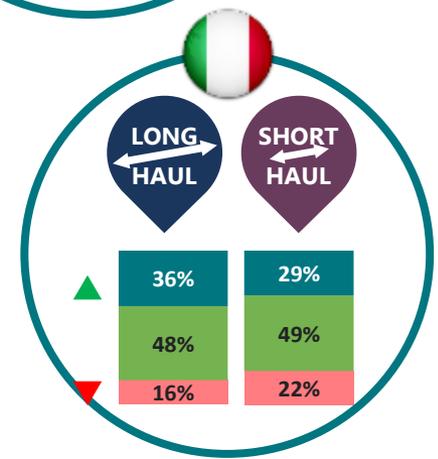
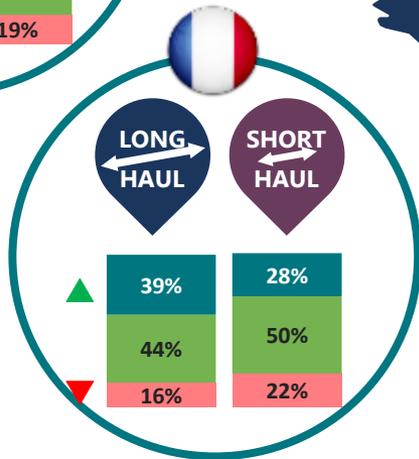
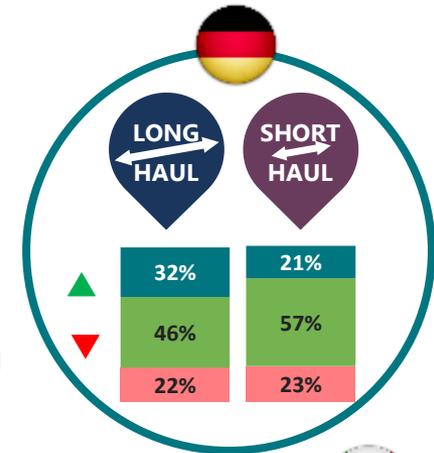
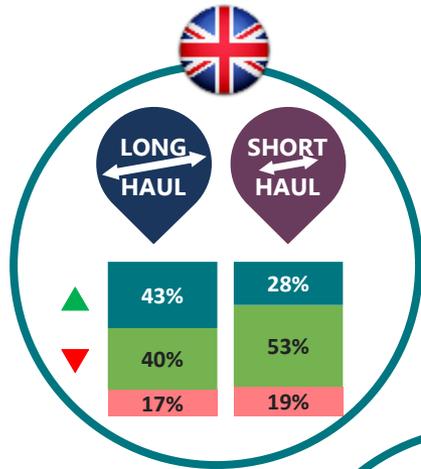
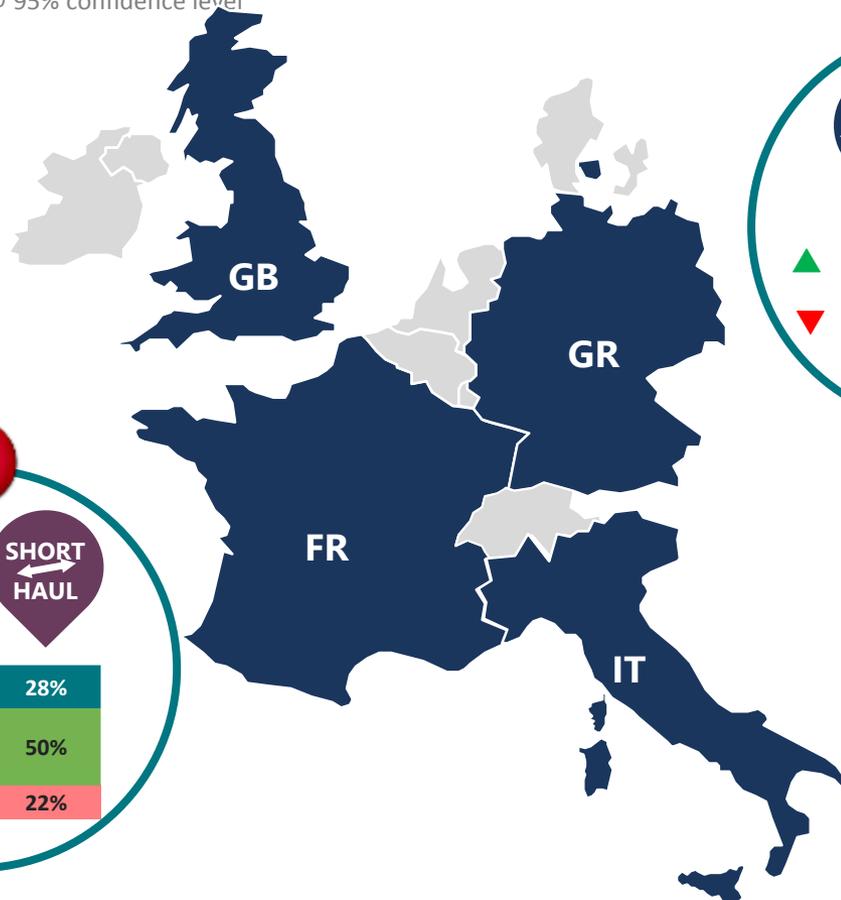
Key
 High = 7-9
 Medium = 4-6

When comparing Britain and its key competitors, we see the same trend – long haul considerers feel they have significantly more knowledge for the four destinations

Q: How much do you feel you know about each of these countries as a holiday destination (scale of 1-9 where 1 is 'I know nothing at all' and 9 is 'I know exactly what to expect from a holiday to this country?')

Base: Considerers

▲ ▼ significantly higher/ lower vs Short Haul @ 95% confidence level



Key
 High = 7-9
 Medium = 4-6
 Low = 1-3

Knowledge of Britain is stronger across most long haul markets (exception of Brazil) whereas knowledge is as per average amongst short haul markets (higher for Italy & Spain)

Q: How much do you feel you know about each of these countries as a holiday destination (scale of 1-9 where 1 is 'I know nothing at all' and 9 is 'I know exactly what to expect from a holiday to this country')
 Base: Considerers

% Average destination knowledge vs knowledge of Britain (circles show difference between Britain and Competitors)

LONG HAUL

Average all destinations (Grey) | Britain (Blue)

	JAP	KOR	SAU	UAE	AUS	USA	CAN	NZ	IND	BRA	RUS	CHI												
HIGH	14	13	22	27	23	23	35	26	50	38	52	30	44	35	51	60	68	42	38	56	55	43	45	
MED	50	49	60	56	38	35	45	35	47	40	48	39	51	43	51	41	30	25	39	37	35	35	42	40
LOW	36	38	19	18	40	42	31	29	27	10	14	10	18	13	14	8	10	7	19	25	9	10	16	15

SHORT HAUL

Avg all global markets (Grey) | Average all destinations (Blue) | Britain (Dark Blue)

	DEN	SWE	NOR	ITA	GER	FRA	SPA	NET	Average all destinations	Britain								
HIGH	25	23	20	22	31	33	27	33	33	31	22	26	25	32	29	27	31%	36%
MED	47	51	50	55	52	55	54	54	52	57	47	49	52	48	51	53	47%	45%
LOW	29	25	30	23	18	12	20	13	15	12	31	25	23	20	20	20	22%	19%

Key
 High = 7-9
 Medium = 4-6
 Low = 1-3

Among those considering visiting Britain, some long haul markets have a higher desire to visit Britain than some of our closer neighbours. In particular, India, China and UAE claim to have a high likelihood to visit.

Q: How likely are you to visit Britain for a holiday in the next 5 years?

Base: Considerers

LONG
HAUL

% Likelihood to visit Britain

	NZ	US	CA	AU	BR	RU	IN	CH	JP	SK	SA	UA	Avg all global markets
Extremely and very likely to visit	58	61	49	58	67	60	88	82	63	43	72	75	61%
Possibly	37	30	43	31	23	34	11	16	24	49	25	19	32%
Not at all and not very likely to visit	6	9	8	11	10	7	1	2	14	8	3	6	7%

SHORT
HAUL

	DM	SW	NW	IT	GE	FR	SP	NE	Avg all global markets
Extremely and very likely to visit	55	47	54	76	42	63	66	48	61%
Possibly	38	42	41	22	48	30	28	45	32%
Not at all and not very likely to visit	8	10	5	2	10	7	6	7	7%

QC7: How likely are you to visit Britain for a holiday in the next 5 years?

Base: Considerers: South Korea (300), Canada (300), New Zealand (300), Australia (300), Russia (300), USA (300), Brazil (300), Japan (300), Saudi (172), UAE (128), China (300), Germany (300), Sweden (300), Netherlands (300), Norway (300), Denmark (300), France (300), Spain (300), Italy (300) India (300)

Note: Cultural bias needs to be taken into consideration whilst interpreting the data – Asia, Brazil and Gulf usually score higher on agreement scales than other countries

SUMMARISING 'BRITAIN & COMPETITORS'

- Almost half of previous holiday visitors have **visited Britain for 4-7 nights**. Visitors from **short haul markets have taken more shorter holidays** (1-7 nights) whereas **long haul travellers have visited Britain for a longer duration** (8+ nights).
- Previous visitors to Britain from short haul markets have a higher tendency to have only considered Britain for a holiday when compared to long haul markets (35% vs. 16% respectively).
- **France is the most considered alternative destination to Britain** amongst travellers who have visited Britain in the past. Italy & Germany are the second most considered alternative amongst long haul markets whereas Ireland comes in second amongst short haul markets.
- **There is a similar level of knowledge for Britain when compared to its key competitor France**, and slightly higher than for Italy & especially Germany, amongst travellers considering visiting Britain in the future.

Overall, **long haul markets have stronger knowledge of Britain than short haul** – a trend that is also absorbed for our other competitors.

- **Long haul markets claim to have a higher likelihood to visit Britain** in the next 5 years than short haul markets.