



Booking a Holiday

# What will we cover within 'Holiday booking' section?

**This section focusses on the overall booking process.  
We will cover the following questions:**

## **1. How do people do their bookings?**

- a. Do people book their travel and accommodation together or separately?**  
*Booking approach used by past visitors; differences by markets*
- b. Do travellers go for direct or indirect channels when booking different elements of a holiday?**  
*Direct and Indirect methods used for booking travel, accommodation and holiday (both together); differences by markets and demographics if applicable*

## **2. What modes & devices are used by travellers to make their booking?**

- a. Did people use online/offline channels to book their travel/accommodation/holiday?**  
*Online and offline methods of booking travel, accommodation and holiday (both together); differences by markets if applicable*
- b. What devices did people use to make their booking?**  
*Devices used to book travel/ accommodation/ holiday (both together); differences by markets called out if applicable*

## **3. Why do people use online travel agents/ comparison sites & what channels did they use for booking?**

- a. Why do people use online travel agencies?**  
*Reasons for using online agencies; differences by markets called out if applicable*
- b. What activities (specifically around pricing) are done by travellers before booking?**  
*Price comparison activities done; differences by markets*
- c. Which sites do people use before making their booking?**  
*Top sites used by travellers; differences by markets called out if applicable*
- d. Which channel did travellers use to make the booking?**  
*Online channels used for booking travel/accommodation/holiday (travel & accommodation together); differences by markets*

## **4. What activities do people expect to buy for their holiday?**

- a. What activities have travellers bought/will buy for their holiday?**  
*Activities bought before visit, during visit or did not buy; differences by visitors/considerers and markets if applicable*

# #1 SUMMARY



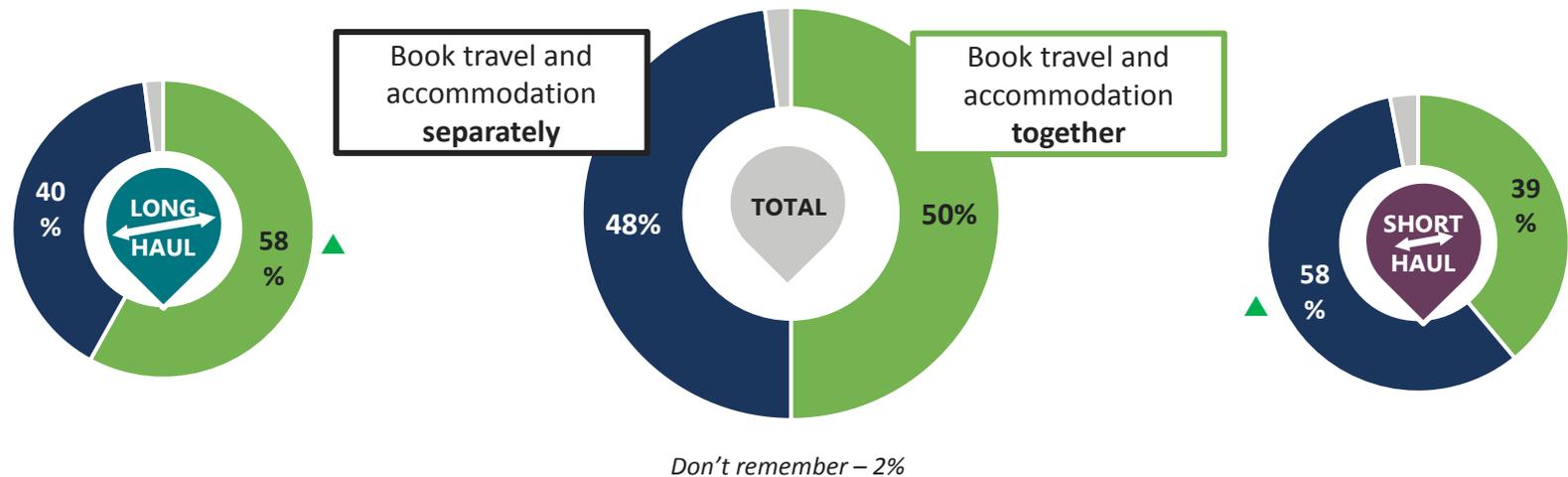
## How do people do their bookings?

- Overall there is an **even split between booking travel & accommodation separately vs. together.** However there are differences by markets - **long haul visitors are more likely to book both aspects of their holiday together,** whereas **short haul visitors are more likely to book travel & accommodation separately.** Whilst most individual markets follow a similar pattern, **Australia and New Zealand** are **more likely to book travel and accommodation separately**
- **Holidays (when travel and accommodation are booked together)** are usually **booked through travel agents,** whereas **travel/accommodation** are usually **booked directly with transport operators/accommodation providers.** Although a **substantial proportion of travellers** (specifically **younger adults**) have also **booked their travel/ accommodation through travel agents/websites**
- There are also some **differences by markets:**
  - Gulf, Advanced Asia, India, China & NZ are more likely to book their travel and accommodation indirectly through travel agents/operators/sites
  - India, Italy, Gulf & US are also more likely to book holidays directly through transport operator

At an overall level, there is a broadly similar split of visitors who have booked travel and accommodation separately or together. However, more long haul visitors have booked both elements together, while more short haul visitors have booked the two elements separately.

Base: Visitors

## How do people book their travel and accommodation?



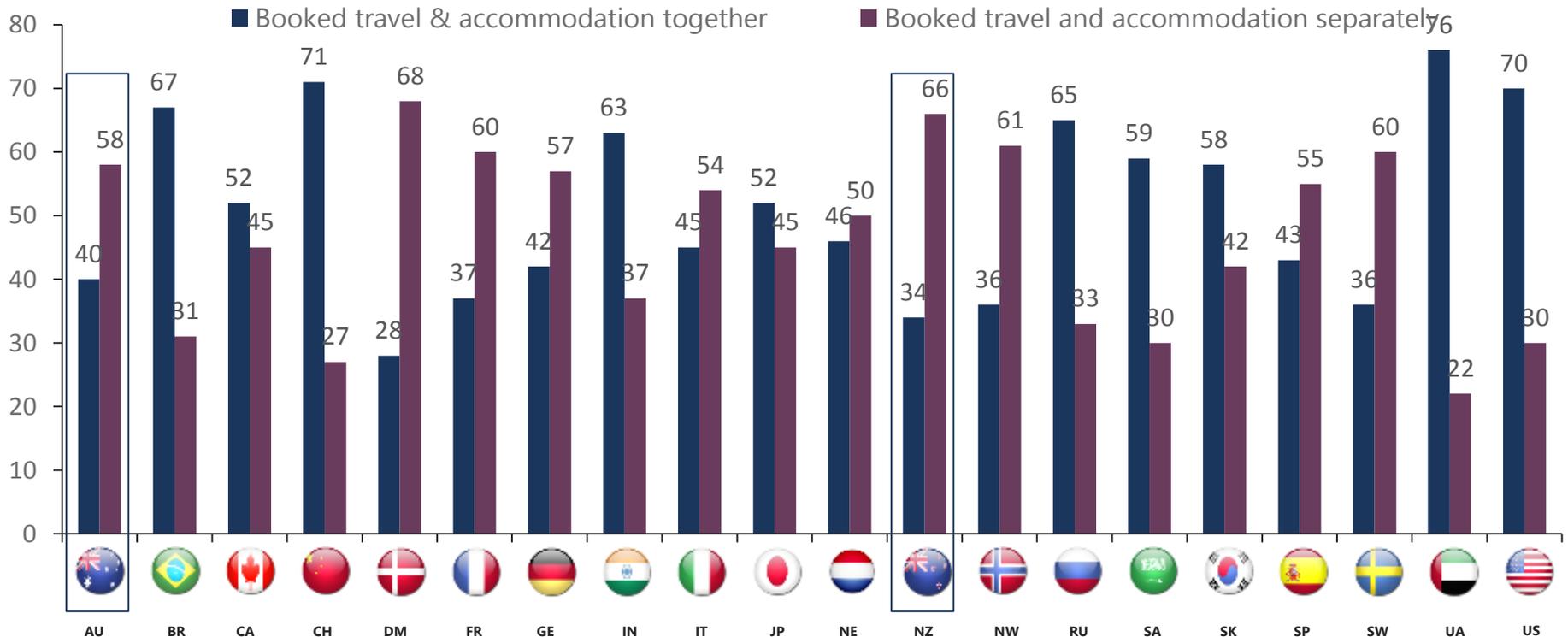
QB1: Which of the following best describes how you booked your holiday to Britain? If someone else made the booking, how did they book the holiday?  
 Base: Visitors (5700), Long haul(3300), Short haul (2400),

▲ ▼ significantly higher/ lower @ 95% confidence level

Most individual markets follow the same trend as long haul/short haul with the exception of AU and NZ, which are higher on booking travel and accommodation separately

Base: Visitors

## How did people book their travel and accommodation to Britain?



QB1: Thinking your holiday to Britain: which of the following best describes how you booked your holiday? If someone else made the booking, how did they book the holiday?

Base: Visitors (5700), Australia (300), Brazil (300), Canada (300), China (300), India (300), Japan (300), New Zealand (300), Russia (300), Saudi Arabia (175), South Korea (300), United Arab Emirates (125), United States (300), Denmark (300), France (300), Germany (300), Italy (300), Netherlands (300), Norway (300), Spain (300), Sweden (300)

Looking at the modes of booking, holidays are predominantly booked through travel agents, operators or comparison sites whereas travel and accommodation are more likely to be booked directly (younger travellers more likely to go to travel agents/sites for these)

Base: Visitors & Considerers

## What booking method have people used previously?

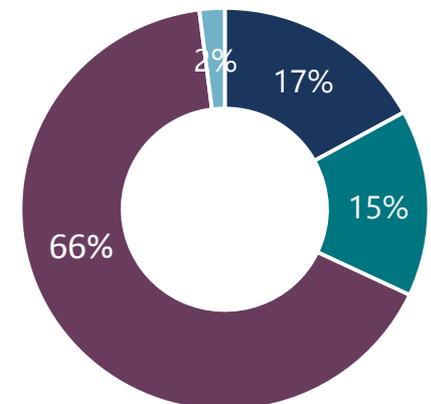
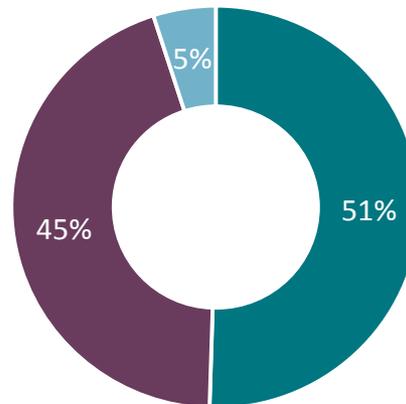
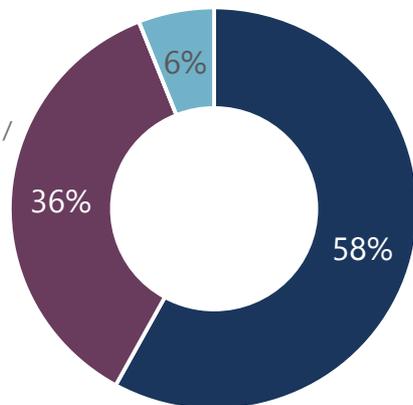
### % Method of booking travel, accommodation & holidays

#### Travel

#### Accommodation

#### Holiday (booked travel & accommodation together)

- Directly with airline / train / ferry operator
- Through a travel agent / tour operator / travel comparison website
- Directly with accommodation provider
- Don't know



Booking through travel agent/operator/comparison website  
18-44s (39%) ▲ vs. 45+ (32%)

Booking through travel agent/operator/comparison website  
18-44s (49%) ▲ vs. 45+ (39%)

Booking through travel agent/operator/comparison website  
18-44s (62%) vs. 45+ (72%)

QB4: How did you book the following?

Base: Total Booked together (5964), Booked separately (5120), Booked travel and accommodation separately and didn't stay with friends (3816)

▲ ▼ significantly higher/ lower @ 95% confidence level

Looking at markets – Gulf, Advanced Asia, India, China & NZ are also more likely to book their travel and accommodation through travel agents/operators/sites whereas India, Italy, Gulf & US are also more likely to book holidays through transport operators

Base: Visitors & Considerers

## What booking method have people used previously?

### % Method of booking travel, accommodation & holidays

| <b>Travel</b>  |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
|--|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| Directly with the airline / train / ferry operator                 | 59 | 63 | 53 | 29 | 71 | 66 | 65 | 41 | 72 | 46 | 65 | 53 | 72 | 71 | 43 | 19 | 60 | 60 | 46 | 67 |
| Through a travel agent / tour operator / travel comparison website | 38 | 34 | 43 | 71 | 21 | 21 | 24 | 57 | 24 | 50 | 22 | 41 | 23 | 26 | 53 | 76 | 35 | 35 | 52 | 30 |
| <b>Accommodation</b>   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
| Directly with the accommodation provider                           | 60 | 55 | 61 | 28 | 59 | 65 | 62 | 43 | 50 | 37 | 52 | 64 | 49 | 58 | 37 | 25 | 45 | 47 | 37 | 62 |
| Through a travel agent / tour operator / travel comparison website | 37 | 43 | 36 | 71 | 33 | 27 | 35 | 53 | 47 | 60 | 42 | 30 | 45 | 35 | 56 | 73 | 53 | 47 | 53 | 36 |
| <b>Holiday (Travel &amp; Accommodation)</b>                        |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
| Directly with the airline / train / ferry operator                 | 15 | 17 | 19 | 11 | 13 | 23 | 6  | 22 | 21 | 10 | 20 | 19 | 20 | 8  | 26 | 17 | 13 | 20 | 29 | 23 |
| Directly with the accommodation provider                           | 15 | 17 | 19 | 10 | 11 | 14 | 17 | 17 | 17 | 7  | 14 | 13 | 11 | 15 | 26 | 10 | 13 | 5  | 20 | 28 |
| Through a travel agent / tour operator / travel comparison website | 68 | 66 | 59 | 78 | 70 | 58 | 75 | 61 | 60 | 81 | 57 | 64 | 63 | 77 | 45 | 73 | 73 | 72 | 49 | 48 |

QB4: How did you book the following?

Base: All participants (11400), Booked travel and accommodation separately(5120), Booked travel and accommodation separately and didn't stay with friends (3816), Booked travel and accommodation together (5964), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

## #2 SUMMARY



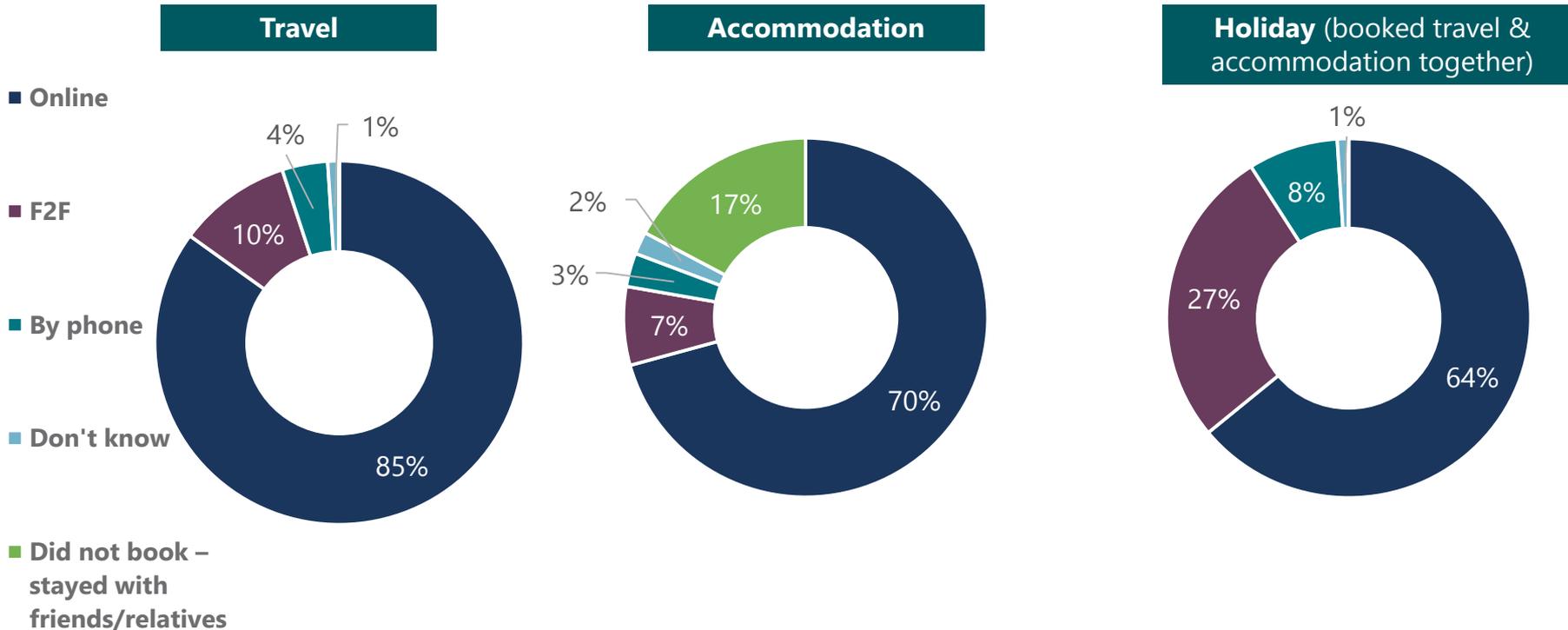
### What modes & devices are used by travellers to make their booking?

- **Most bookings** (travel, accommodation, holiday) have been **done online** by visitors to Britain
- Yet 17% of visitors **who booked their accommodation separately stayed with friends/family** (driven by New Zealand, Australia, Canada and UAE), whereas **27% of visitors booked a holiday face to face** (driven by Brazil, Australia, New Zealand, Germany, Canada and UAE)
- Overall **Brazil & Gulf prefer to book face to face**, more than other countries
- Most travellers **use their laptops/desktops to book their trip**. However, **younger travellers** are **more likely to use their smartphones and tablets** to do so
- Additionally, **China, India, South Korea & Gulf** are also more likely to **use smartphones and tablets** for booking their trip

Most bookings to Britain were done online, however, 1 in 5 visitors who booked accommodation separately stayed with friends/relatives. Almost 30% visitors who booked a holiday did it face to face

## How did people book previously? % Method of booking travel, accommodation & holidays

Base: Visitors



QB3: Thinking about the last holiday you took to a foreign country: which of the following best describes how you booked your holiday? If someone else made the booking, how did they book the holiday?

Base: Booked travel and accommodation separately (2569), Booked travel and accommodation together (2703)

Looking at individual markets, Brazil and Gulf are also high on face to face bookings. NZ, AU, Russia and Spain are high on booking face to face holidays, whereas Gulf, US and Japan are also likely to do phone bookings for holidays. New Zealand is also high on staying with friends/family

Base: Visitors

## How have people booked previously? % Method of booking travel, accommodation & holidays

|  |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    | Gulf |
|--|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|------|
| <b>Travel</b>                                  |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |
| Online   | 76 | 68 | 78 | 80 | 92 | 87 | 82 | 77 | 91 | 84 | 94 | 73 | 99 | 79 | 88 | 93 | 98 | 83 | 66   |
| Face to face                                   | 17 | 27 | 9  | 9  | 2  | 10 | 14 | 14 | 7  | 8  | 1  | 21 | 1  | 17 | 7  | 4  | 1  | 12 | 29   |
| By phone                                       | 3  | 4  | 11 | 6  | 4  | 1  | 4  | 6  | 1  | 6  | 3  | 3  | -  | 4  | 5  | 2  | 1  | 5  | 6    |
| <b>Accommodation</b>                           |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |
| Online   | 60 | 74 | 66 | 69 | 76 | 71 | 72 | 67 | 73 | 78 | 72 | 46 | 87 | 65 | 86 | 75 | 82 | 66 | 43   |
| Face to face                                   | 6  | 15 | 6  | 9  | 2  | 5  | 10 | 7  | 9  | 7  | 6  | 2  | 1  | 13 | 4  | 7  | 1  | 11 | 24   |
| By phone                                       | 2  | 1  | 5  | 4  | 2  | 4  | 5  | 6  | 1  | 3  | -  | 2  | 3  | 3  | 5  | 1  | 1  | 8  | 11   |
| Did not book – stayed with friends / relatives | 29 | 9  | 23 | 17 | 16 | 19 | 13 | 20 | 16 | 11 | 21 | 48 | 7  | 14 | 6  | 15 | 15 | 15 | 17   |
| <b>Holiday</b>                                 |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |
| Online   | 53 | 61 | 71 | 82 | 82 | 78 | 58 | 76 | 68 | 58 | 81 | 49 | 86 | 41 | 59 | 66 | 83 | 58 | 48   |
| Face to face                                   | 37 | 31 | 21 | 13 | 4  | 17 | 36 | 16 | 28 | 32 | 10 | 42 | 1  | 56 | 23 | 33 | 9  | 24 | 31   |
| By phone                                       | 9  | 8  | 7  | 5  | 10 | 2  | 5  | 8  | 2  | 10 | 6  | 7  | 6  | 3  | 16 | 1  | 6  | 17 | 20   |

NOTE: Gulf NET shown instead of Saudi Arabia and UAE individually due to low bases

QB3: How did you book your travel and accommodation to Britain? If someone else made the booking, how did they book the travel?

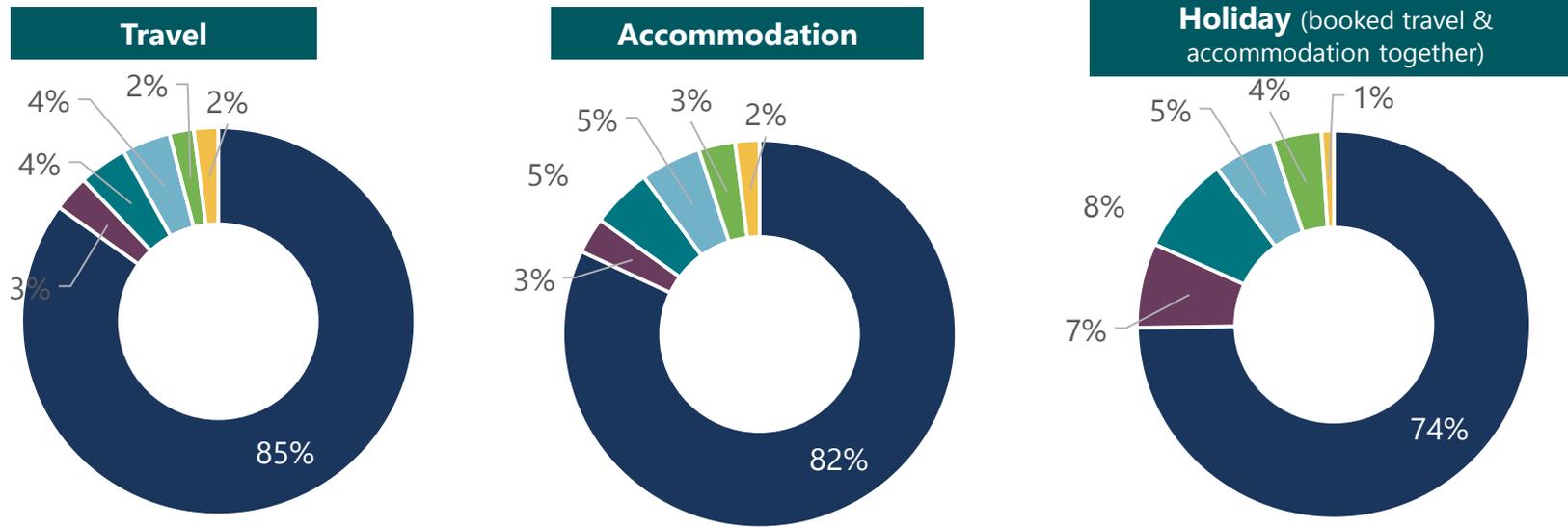
Base: Visitors: Booked separately-travel & accommodation (2569)/ Booked together- holiday (2703), Australia (173)/(116), Brazil (89)/(202), Canada (133)/(155), China (81)/(212), India (111)/(188), Japan (135)/(155), New Zealand (197)/(100), Russia (98)/(194), Saudi Arabia (53)/(104), South Korea (126)/(174), United Arab Emirates (26)/(95), United States (88)/(201), Denmark (198)/(75), France (148)/(95), Germany (131)/(92), Italy (161)/(132), Netherlands (102)/(78), Norway (179)/(106), Spain (162)/(126), Sweden (178)/(105), Gulf (81/196)

Most bookings are done on laptops or desktops, however younger travellers are more likely to use smartphones or tablets to do this as well. China, India, Gulf and South Korea are also more likely to use devices other than laptops

Base: Visitors & Considerers

## What device have people used to book previously?

% Device for booking travel, accommodation & holidays, if booked online



**China, India, Gulf, South Korea are more likely than other markets to book using smartphones and tablets**

Note: Market level data in appendix

QB5: And what did you use to book the following?

Base: Online bookers. Travel - booked separately (3,407), Accommodation - booked separately and didn't stay with friends (2,909), Booked travel and accommodation together (3,135)

Note: Market level data in appendix

## #3 SUMMARY

WWW

### Why do people use online travel agents/ comparison sites & what channels did they use for booking?

- The main motivation to use online travel agencies/comparison websites is to **compare prices, find a destination within budget and find the lowest prices** – this is highest among long haul travellers who have higher travel expenses due to distance (particularly in India & Brazil)
- As a result, **most people compare prices online via websites, online agents and search engines before they travel** – though long haul travellers are also likely to discuss prices with friends via social media or phone/email (particularly in India, Brazil, Russia, Gulf & China)
- **Online-only operators are most popular when booking travel, accommodation or a holiday** (much stronger for accommodation). **Traditional tour operators** are also used considerably by travellers when **booking a holiday**
- But there are differences by markets when booking travel or holiday, more specifically –
  - Travellers from Norway, Denmark, France & Netherlands also use 'other' online methods
  - France & Netherlands also use search engines
  - Traditional tour operators are also used more in Denmark & Sweden
  - Official tourist organisation websites are also more used in the Gulf
  - Traveller review websites are also used more in Canada & Australia

Online travel agencies are mostly used to compare prices, find a destination within budget and find the lowest prices

## Why do people use online travel agencies?

Base: Visitors & Considerers



Long haul driven by India (74%), Brazil (67%) and USA (66%)

Long haul driven by Brazil (83%), India (82%)

Long haul driven by China (80%), India (78%), Brazil (76%)

Short haul driven by Italy (74%), Spain (73%)

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

**Note: Market level data in appendix**

QR7: To what extent do you agree with the following statements about booking travel through online travel agencies such as Lastminute.com or Expedia?  
 Base: All participants (1140), Long Haul total (6600), Short Haul Total (4800)

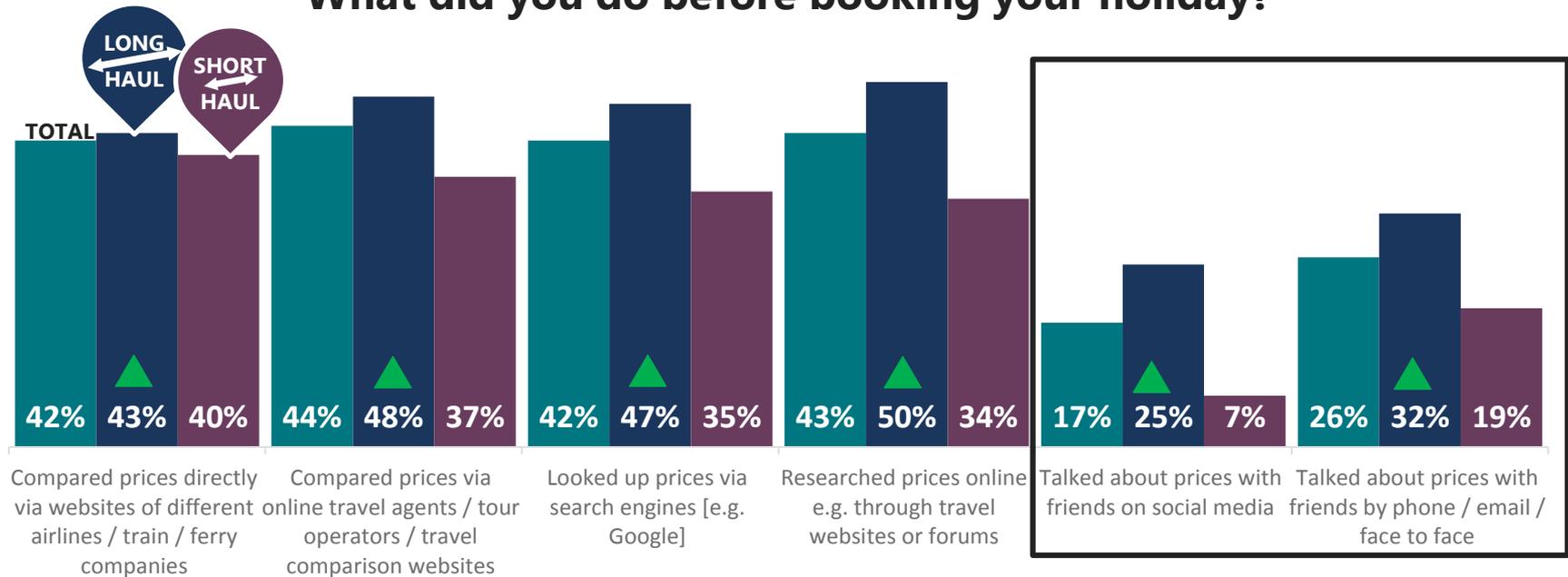
▲▼ significantly higher/ lower SH @ 95% confidence level

Note: Market level data in appendix

This also mirrors in terms of the activities done before booking a holiday – travellers are likely to research and compare prices online via websites, online agents and search engines (most among long haul travellers). Long haul travellers are also more likely to talk about prices with friends via phone or social media

Base: Visitors & Considerers

### What did you do before booking your holiday?



QR4: VISITORS: Before booking your holiday to Britain, which of the following did you do?/ CONSIDERERS: Before booking the last holiday you took to a foreign country, which of the following did you do?

Base: All participants (1140), Long Haul total (6600), Short Haul Total (4800), China (600), India (600), United Arab Emirates (253), Germany (600), Italy (600), Norway (600)

▲ ▼ significantly higher/ lower SH @ 95% confidence level

Among short haul, comparing prices directly via websites of different travel companies is the most popular across countries. A third of travellers in Germany, Spain & Italy discussed prices with their friends via phone/ email or F2F

**% travellers who would do the following before booking**

Base: Visitors & Considerers



Top 2 scores highlighted/market

|  | DM | SW | NW | IT | GE | FR | SP | NE | Avg all global markets |
|--|----|----|----|----|----|----|----|----|------------------------|
| Compared prices directly via websites of different airlines / train / ferry companies  | 33 | 41 | 48 | 46 | 37 | 37 | 42 | 35 | 42%                    |
| Compared prices via online travel agents / tour operators / travel comparison websites | 31 | 37 | 36 | 41 | 35 | 33 | 48 | 34 | 44%                    |
| Looked up prices via search engines [e.g. Google]                                      | 31 | 28 | 25 | 45 | 36 | 39 | 42 | 33 | 42%                    |
| Researched prices online e.g. through travel websites or forums                        | 29 | 29 | 44 | 49 | 35 | 26 | 37 | 25 | 43%                    |
| Talked about prices with friends on social media                                       | 3  | 6  | 6  | 10 | 9  | 6  | 12 | 7  | 17%                    |
| Talked about prices with friends by phone / email / face to face                       | 16 | 17 | 16 | 22 | 29 | 18 | 21 | 12 | 26%                    |
| None of these  | 27 | 19 | 17 | 7  | 19 | 19 | 9  | 26 | 12%                    |

QR4: VISITORS: Before booking your holiday to Britain, which of the following did you do? CONSIDERERS: Before booking the last holiday you took to a foreign country, which of the following did you do?

Base: All participants (11400), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

Within long haul markets, price comparison through travel agents/operators/comparison websites and researching prices through travel websites/forums are the most popular across long haul markets. Discussing prices with friends is driven by travellers from China, Brazil, Russia, India and Gulf



**% travellers who would do the following before booking**

Base: Visitors & Considerers

Top 2 scores highlighted/market

|  | AU | BR | CA | CH | IN | JP | NZ | RU | SA | SK | UA | US |
|--|----|----|----|----|----|----|----|----|----|----|----|----|
| Compared prices directly via websites of different airlines / train / ferry companies  | 49 | 48 | 46 | 37 | 54 | 25 | 50 | 45 | 38 | 31 | 53 | 49 |
| Compared prices via online travel agents / tour operators / travel comparison websites | 41 | 59 | 38 | 61 | 58 | 41 | 46 | 57 | 39 | 53 | 48 | 38 |
| Looked up prices via search engines [e.g. Google]                                      | 49 | 54 | 46 | 49 | 56 | 30 | 50 | 54 | 39 | 48 | 44 | 45 |
| Researched prices online e.g. through travel websites or forums                        | 47 | 56 | 44 | 54 | 54 | 47 | 47 | 56 | 39 | 56 | 49 | 46 |
| Talked about prices with friends on social media                                       | 8  | 33 | 14 | 45 | 43 | 11 | 11 | 25 | 30 | 25 | 39 | 24 |
| Talked about prices with friends by phone / email / face to face                       | 29 | 32 | 31 | 38 | 49 | 14 | 30 | 33 | 35 | 22 | 44 | 30 |
| None of these  | 12 | 3  | 11 | 1  | 2  | 19 | 12 | 4  | 5  | 4  | 4  | 9  |

QR4: VISITORS: Before booking your holiday to Britain, which of the following did you do? CONSIDERERS: Before booking the last holiday you took to a foreign country, which of the following did you do?  
 Base: All participants (11400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600)

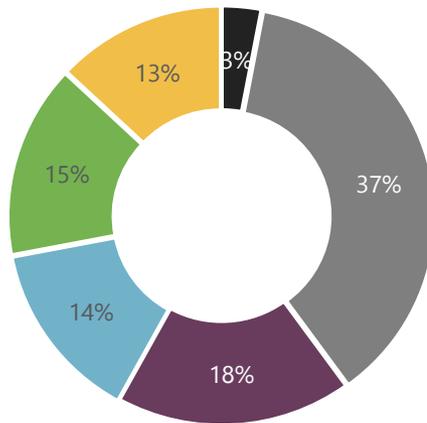
Online-only operator sites are most popular for booking travel, accommodation or holiday (much more popular for booking accommodation). Considerable proportion of travellers also use traditional tour operators to book their holidays

## How have people booked?

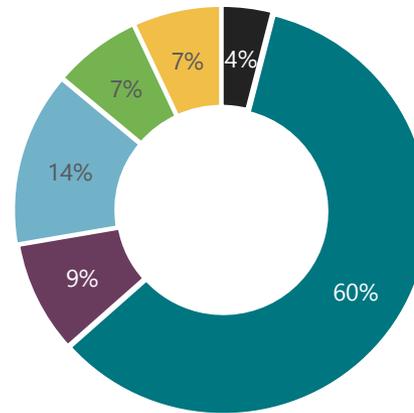
Base: Visitors & Considerers

- Official tourist organisation website
- Online-only tour operator site/ travel agency/comparison site
- Online-only accommodation booking site/ travel agency/comparison site
- Traditional tour operator / travel agency
- Through a website providing traveller reviews of destinations
- Search engines which provide booking
- Online – other

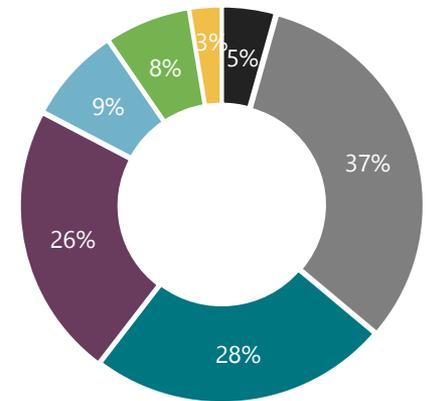
Travel Total



Accommodation Total



Holiday (booked travel & accommodation together)



Note: Market level data in appendix

QB6: And what did you use to book the following?

Base: Booked separately, travel (1428). Booked separately, accommodation (1595). Booked together (2158)

Online-only tour operator sites are the most popular across short haul markets when it comes to booking travel or holiday, specifically for Spain and Germany. Denmark and Sweden also use traditional travel agents/tour operators more whereas search engines are also popular in France & Netherlands



**% using the following to book either their travel or holiday**

Base: Visitors & Considerers Booked travel or holiday

Scores higher than global average highlighted/market

Avg all global markets

|   | DM  | SW  | NW  | IT  | GE  | FR  | SP  | NE  |     |
|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Through an official tourist organisation website for the country or destination   | 0%  | 2%  | 3%  | 6%  | 4%  | 3%  | 3%  | 5%  | 4%  |
| Through an online-only tour operator website/ travel agency/ travel comparison website e.g. – Expedia, lastminute.com     | 30% | 23% | 28% | 30% | 35% | 31% | 37% | 20% | 28% |
| Through an online-only accommodation booking website/ travel agency/comparison website e.g. – Expedia, hotels.com, AirBnB | 10% | 9%  | 14% | 21% | 16% | 8%  | 21% | 14% | 17% |
| Through a traditional tour operator / travel agency with an online presence   | 32% | 38% | 23% | 12% | 16% | 21% | 14% | 22% | 23% |
| Through a website providing traveller reviews of destinations and allowing direct booking e.g. TripAdvisor                | 4%  | 12% | 6%  | 12% | 16% | 5%  | 11% | 11% | 11% |
| Search engines which provide booking facilities e.g. Google   | 11% | 7%  | 7%  | 15% | 8%  | 19% | 8%  | 16% | 11% |
| Online – other  | 14% | 8%  | 20% | 4%  | 5%  | 14% | 6%  | 14% | 7%  |

Note: Low base for markets to report travel, accommodation and holiday individually

QB6: And what did you use to book the following?

Base: Booked travel or holiday (3585) – Denmark (178), Sweden (242), Norway (209), Italy (155), Germany (123), France (101), Spain (204), Netherland (87)

Many long haul markets are most likely to use tour operator websites and online accommodation sites; however, NZ, Japan and South Korea are more likely to use a traditional tour operator



**% using the following to book either their travel or holiday**

Base: Visitors & Considerers Booked travel or holiday

Scores higher than global average highlighted/market

|   | NZ  | US  | CA  | AU  | BR  | RU  | IN  | CH  | JP  | SK  | Gulf | Avg all global markets |
|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|------------------------|
| Through an official tourist organisation website for the country or destination   | 2%  | 7%  | 1%  | 5%  | 6%  | 8%  | 4%  | 8%  | 0%  | 2%  | 15%  | 4%                     |
| Through an online-only tour operator website/ travel agency/ travel comparison website e.g. – Expedia, lastminute.com     | 20% | 27% | 26% | 23% | 24% | 22% | 39% | 29% | 30% | 30% | 18%  | 28%                    |
| Through an online-only accommodation booking website/ travel agency/comparison website e.g. – Expedia, hotels.com, AirBnB | 7%  | 16% | 20% | 16% | 30% | 31% | 23% | 19% | 16% | 9%  | 23%  | 17%                    |
| Through a traditional tour operator / travel agency with an online presence   | 35% | 17% | 11% | 18% | 24% | 13% | 11% | 16% | 36% | 40% | 10%  | 23%                    |
| Through a website providing traveller reviews of destinations and allowing direct booking e.g. TripAdvisor                | 9%  | 13% | 18% | 18% | 10% | 10% | 13% | 13% | 7%  | 5%  | 15%  | 11%                    |
| Search engines which provide booking facilities e.g. Google   | 17% | 11% | 16% | 14% | 4%  | 8%  | 9%  | 13% | 6%  | 11% | 11%  | 11%                    |
| Online – other  | 9%  | 8%  | 9%  | 7%  | 1%  | 8%  | 0%  | 1%  | 5%  | 3%  | 8%   | 7%                     |

**Note: Low base for markets to report travel, accommodation and holiday individually**

QB6: And what did you use to book the following?

Base: Booked travel or holiday (3585)– Australia (153), Brazil (185), Canada (186), China (334), India (252), Japan (269), New Zealand (145), Russia (99), Gulf (162), South Korea (338), USA (164)

## #4 SUMMARY



### What bookable products do people expect to buy for their holiday?

- Overall, most people tend to **pre-book airport transfers, flights within the UK and tickets for tourist attractions/ theatre** (specially among long haul markets), whilst **transport tickets** (such as rail & London underground/Oyster) tend to be **booked during the trip**

The activities which are **least commonly booked are flights around the UK, car hire or tickets to sporting events**

- There is a **difference between what people have booked in the past vs. expect to book in the future**; particularly, pre-booking flights within the UK and airport transfers, booking sightseeing tours in or outside London and booking tickets for theatres, musicals & concerts
- There are some **differences by markets**:
  - USA and India most likely to book activities & travel in advance
  - Russia and UAE tend to book more during the trip
  - Japan, Norway & Denmark least likely to book any activity/ travel
  - Italy & Spain tend to pre-book activities more than other European markets

Many travellers pre-book airport transfers, flights within the UK (although 54% do not need to buy) and tickets for tourist attractions/ theatre. Transport tickets (rail & London underground/oyster) are booked during the visit.

Base: Visitors & Considerers

## What do people buy or expect to buy on their holiday?



|                                   | Coach travel/ Long distance bus | Airport transfer | Transport within London | Train Travel | Flights within the UK | Car hire | Ticket to theatre/ musical /concert | Ticket to sports events | Guided sightseeing tours in London | Guided sightseeing tours outside London | Tickets for other tourist attractions |
|-----------------------------------|---------------------------------|------------------|-------------------------|--------------|-----------------------|----------|-------------------------------------|-------------------------|------------------------------------|---|---------------------------------------|
| <b>Before visit</b>               | 27                              | 43               | 27                      | 30           | 34                    | 32       | 34                                  | 27                      | 31                                 | 31                                      | 34                                    |
| <b>During my visit</b>            | 32                              | 31               | 57                      | 38           | 12                    | 19       | 29                                  | 15                      | 31                                 | 28                                      | 46                                    |
| <b>Did not buy/ expect to buy</b> | 41                              | 26               | 16                      | 33           | 54                    | 49       | 37                                  | 58                      | 38                                 | 41                                      | 20                                    |

People who are considering a holiday to Britain expect to book more activities than past visitors, particularly pre-booking flights within the UK and airport transfers, booking sightseeing tours in or outside London and booking tickets for theatres, musicals & concerts.

Base: Visitors & Considerers

### What do people buy or expect to buy on their holiday?



|                            |             | Coach travel/ Long distance bus | Airport transfer | Transport within London | Train Travel | Flights within the UK | Car hire | Ticket to theatre/ musical /concert | Ticket to sports events | Guided sightseeing tours in London | Guided sightseeing tours outside London | Tickets for other tourist attractions |
|----------------------------|-------------|---------------------------------|------------------|-------------------------|--------------|-----------------------|----------|-------------------------------------|-------------------------|------------------------------------|---|---------------------------------------|
| Before visit               | Visitors    | 24                              | 36               | 26                      | 27           | 28                    | 27       | 30                                  | 27                      | 28                                 | 28                                      | 30                                    |
|                            | Considerers | 30                              | 49               | 28                      | 32           | 40                    | 37       | 37                                  | 29                      | 34                                 | 34                                      | 37                                    |
| During my visit            | Visitors    | 25                              | 29               | 52                      | 31           | 9                     | 15       | 23                                  | 11                      | 22                                 | 19                                      | 41                                    |
|                            | Considerers | 39                              | 33               | 61                      | 45           | 14                    | 23       | 35                                  | 19                      | 40                                 | 36                                      | 52                                    |
| Did not buy/ expect to buy | Visitors    | 50                              | 35               | 22                      | 42           | 63                    | 58       | 48                                  | 65                      | 50                                 | 53                                      | 29                                    |
|                            | Considerers | 31                              | 18               | 10                      | 23           | 46                    | 40       | 27                                  | 51                      | 26                                 | 30                                      | 11                                    |

QB9: Visitors: Did you buy the following when you visited Britain and, if so, when? / Considerers: Do you expect you would buy the following if you travel to Britain?

Base: Visitors (5700), Considerers (5700)

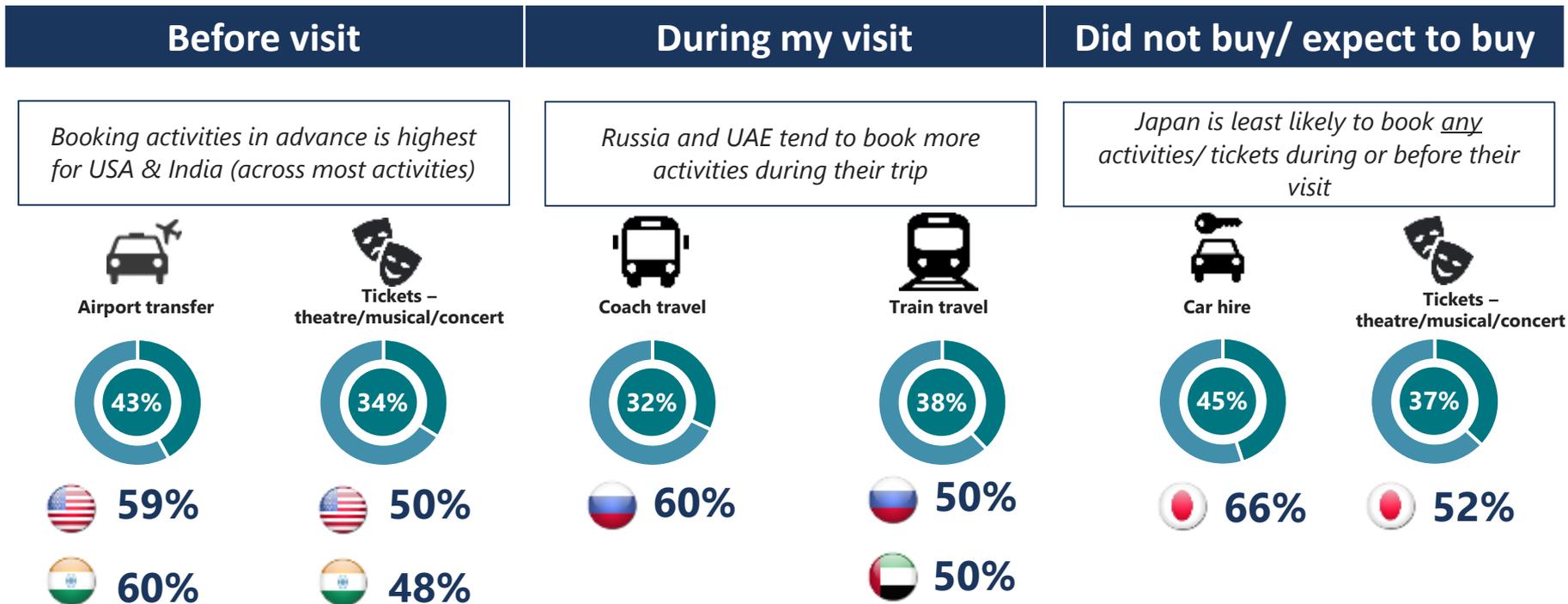
■ significantly higher/ lower vs Visitors @ 95% confidence level

Among long haul, tourists from USA and India are most likely to book activities & travel in advance, whereas Russia and UAE prefer to book during their visit. Japan tends to book fewer activities.



Base: Visitors & Considerers

## What do people buy or expect to buy on their holiday?



QB9: Visitors: Did you buy the following when you visited Britain and, if so, when? / Considerers: Do you expect you would buy the following if you travel to Britain?  
 Base: All participants (11400), Long haul (6600), India (600), Japan (600), United Arab Emirates (253), United States (600), Russia (600)

Among short haul markets, Italy and Spain are more likely to pre-book activities before travelling whereas Norway & Denmark are least likely to buy any activity especially sightseeing tours within London.



Base: Visitors & Considerers

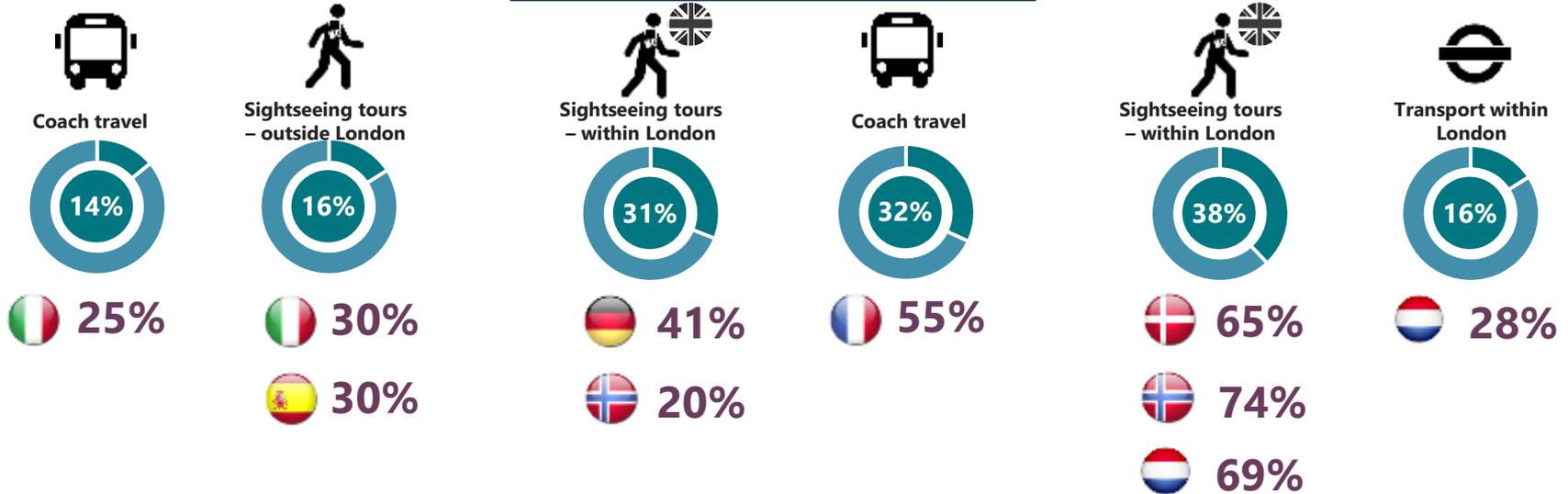
## What do people buy or expect to buy on their holiday?

| Before visit | During my visit | Did not buy/ expect to buy |
|--------------|-----------------|----------------------------|
|--------------|-----------------|----------------------------|

Booking activities in advance is highest for Italy and Spain

Guided sightseeing tours least popular for Norway, France book buses

Norway and Denmark are among those least likely to buy any activities/ tickets during or before their visit



QB9: Visitors: Did you buy the following when you visited Britain and, if so, when? / Considerers: Do you expect you would buy the following if you travel to Britain?  
 Base: All participants (11400), Short haul (4800), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

Among long haul markets, India, USA, Brazil, China and Gulf are most likely to book several actives before they travel, especially flights within the UK.



**% bought/expect to buy the following before their visit**

Base: Visitors

|  | NZ | US | CA | AU | BR | RU | IN | CH | JP | SK | SA | UA |
|--|----|----|----|----|----|----|----|----|----|----|----|----|
| Airport transfer (transport from the airport to the city centre)       | 28 | 63 | 33 | 33 | 54 | 37 | 60 | 54 | 24 | 38 | 53 | 50 |
| Ticket to theatre/musical/concert                                      | 23 | 52 | 28 | 24 | 46 | 35 | 49 | 48 | 29 | 38 | 46 | 32 |
| Tickets /passes for other tourist attractions                          | 20 | 57 | 34 | 28 | 50 | 31 | 57 | 50 | 20 | 42 | 49 | 34 |
| Flights within the UK  | 22 | 53 | 32 | 27 | 47 | 24 | 64 | 59 | 30 | 35 | 51 | 58 |
| Guided sightseeing tours in London                                     | 20 | 56 | 31 | 22 | 52 | 36 | 58 | 51 | 30 | 40 | 50 | 51 |
| Guided sightseeing tours outside London                                | 18 | 56 | 31 | 21 | 50 | 38 | 60 | 54 | 29 | 40 | 49 | 38 |
| Train Travel (within the UK), not including underground / Oyster cards | 23 | 51 | 32 | 24 | 43 | 25 | 50 | 44 | 26 | 32 | 50 | 34 |
| Car hire   | 32 | 52 | 31 | 40 | 50 | 22 | 49 | 35 | 20 | 32 | 50 | 48 |
| Transport within London e.g. underground tickets, Oyster cards         | 16 | 50 | 32 | 22 | 40 | 24 | 51 | 38 | 18 | 29 | 51 | 40 |
| Coach travel/Long distance bus in the UK                               | 21 | 49 | 26 | 21 | 40 | 25 | 50 | 47 | 18 | 34 | 49 | 42 |
| Ticket to sports events  | 16 | 48 | 22 | 18 | 38 | 30 | 53 | 48 | 18 | 34 | 43 | 44 |

Ranked on Global Average for Visitors

Q89: VISITORS Did you buy the following when you visited Britain and, if so, when?

Base: Visitors (5700), Australia (300), Brazil (300), Canada (300), China (300), India (300), Japan (300), New Zealand (300), Russia (300), Saudi Arabia (175), South Korea (300), United Arab Emirates (125), United States (300), Denmark (300), France (300), Germany (300), Italy (300), Netherlands (300), Norway (300), Spain (300), Sweden (300)

Short haul travellers are generally less likely to book any activities or travel in advance, though Germany and Spain are the most likely to do so. Italy is high on booking coach, sightseeing tours outside London and flights around the UK

**% bought/expect to buy the following before their visit**

Base: Visitors

Ranked on Global Average for Visitors



|  |  DM |  SW |  NW |  IT |  GE |  FR |  SP |  NE | Avg all global markets |
|--|--|--|--|---|--|--|--|--|------------------------|
| Airport transfer (transport from the airport to the city centre)       | 30   | 25   | 14   | 39  | 30   | 19   | 37   | 14   | <b>36%</b>             |
| Ticket to theatre/musical/concert                                      | 22   | 21   | 19   | 22  | 19   | 13   | 21   | 14   | <b>30%</b>             |
| Tickets /passes for other tourist attractions                          | 16   | 16   | 14   | 26  | 24   | 15   | 24   | 11   | <b>31%</b>             |
| Flights within the UK  | 3  | 11   | 2  | 22  | 12   | 10   | 14   | 10   | <b>28%</b>             |
| Guided sightseeing tours in London                                     | 6  | 6  | 3  | 21  | 17   | 13   | 21   | 8  | <b>28%</b>             |
| Guided sightseeing tours outside London                                | 5  | 8  | 5  | 20  | 16   | 10   | 19   | 8  | <b>28%</b>             |
| Train Travel (within the UK), not including underground / Oyster cards | 12   | 10   | 14   | 20  | 18   | 14   | 17   | 12   | <b>27%</b>             |
| Car hire   | 6  | 10   | 10   | 17  | 23   | 13   | 17   | 10   | <b>27%</b>             |
| Transport within London e.g. underground tickets, Oyster cards         | 16   | 10   | 14   | 24  | 22   | 12   | 16   | 14   | <b>26%</b>             |
| Coach travel/Long distance bus in the UK                               | 6  | 7  | 6  | 20  | 13   | 8  | 14   | 10   | <b>24%</b>             |
| Ticket to sports events  | 6  | 14   | 12   | 16  | 9  | 10   | 13   | 13   | <b>24%</b>             |

QB9: VISITORS Did you buy the following when you visited Britain and, if so, when?

Base: Visitors (5700), Australia (300), Brazil (300), Canada (300), China (300), India (300), Japan (300), New Zealand (300), Russia (300), Saudi Arabia (175), South Korea (300), United Arab Emirates (125), United States (300), Denmark (300), France (300), Germany (300), Italy (300), Netherlands (300), Norway (300), Spain (300), Sweden (300)

Unlike USA and India visitors who tend to pre-book, tourists from Russia and UAE tend to book activities and buy tickets during their holiday – in particular travel and attractions outside London.



**% bought/expect to buy the following during their visit**

Base: Visitors

|  | NZ | US | CA | AU | BR | RU | IN | CH | JP | SK | SA | UA |
|--|----|----|----|----|----|----|----|----|----|----|----|----|
| Transport within London e.g. underground tickets, Oyster cards         | 64 | 33 | 46 | 54 | 50 | 63 | 43 | 48 | 53 | 54 | 39 | 45 |
| Tickets /passes for other tourist attractions                          | 51 | 30 | 42 | 44 | 42 | 57 | 36 | 40 | 19 | 40 | 28 | 34 |
| Train Travel (within the UK), not including underground / Oyster cards | 39 | 22 | 30 | 32 | 36 | 41 | 37 | 36 | 27 | 33 | 30 | 47 |
| Airport transfer (transport from the airport to the city centre)       | 24 | 13 | 30 | 23 | 28 | 37 | 29 | 29 | 35 | 41 | 33 | 29 |
| Coach travel/Long distance bus in the UK                               | 16 | 12 | 18 | 13 | 32 | 55 | 29 | 42 | 23 | 24 | 31 | 36 |
| Ticket to theatre/musical/concert                                      | 30 | 25 | 28 | 24 | 38 | 29 | 33 | 24 | 8  | 20 | 27 | 45 |
| Guided sightseeing tours in London                                     | 20 | 20 | 26 | 22 | 23 | 50 | 33 | 30 | 9  | 25 | 26 | 30 |
| Guided sightseeing tours outside London                                | 18 | 18 | 22 | 21 | 18 | 40 | 29 | 29 | 9  | 20 | 29 | 39 |
| Car hire   | 15 | 20 | 17 | 9  | 18 | 32 | 43 | 30 | 5  | 18 | 29 | 42 |
| Ticket to sports events  | 10 | 14 | 15 | 11 | 24 | 18 | 17 | 14 | 3  | 19 | 18 | 40 |
| Flights within the UK  | 10 | 8  | 9  | 6  | 12 | 13 | 16 | 24 | 6  | 24 | 20 | 23 |

QB9: VISITORS Did you buy the following when you visited Britain and, if so, when?

Base: Visitors (5700), Australia (300), Brazil (300), Canada (300), China (300), India (300), Japan (300), New Zealand (300), Russia (300), Saudi Arabia (175), South Korea (300), United Arab Emirates (125), United States (300), Denmark (300), France (300), Germany (300), Italy (300), Netherlands (300), Norway (300), Spain (300), Sweden (300)

Ranked on Global Average for Visitors

Short haul visitors are as likely as long haul to book train travel, transport within London and tickets for attractions. Visitors from France are most likely to book coach travel on arrival, and along with Spain, book transport within London during their trip.



**% bought/expect to buy the following during their visit**

Base: Visitors

|  | DM | SW | NW | IT | GE | FR | SP | NE | Avg all global markets |
|--|----|----|----|----|----|----|----|----|------------------------|
| Transport within London e.g. underground tickets, Oyster cards         | 50 | 59 | 53 | 60 | 47 | 65 | 65 | 42 | 52%                    |
| Tickets /passes for other tourist attractions                          | 42 | 36 | 40 | 42 | 37 | 49 | 48 | 44 | 41%                    |
| Train Travel (within the UK), not including underground / Oyster cards | 20 | 30 | 28 | 27 | 27 | 22 | 36 | 26 | 31%                    |
| Airport transfer (transport from the airport to the city centre)       | 32 | 38 | 26 | 43 | 20 | 19 | 39 | 20 | 29%                    |
| Coach travel/Long distance bus in the UK                               | 12 | 15 | 22 | 24 | 15 | 44 | 34 | 20 | 25%                    |
| Ticket to theatre/musical/concert                                      | 14 | 19 | 18 | 19 | 19 | 11 | 24 | 14 | 23%                    |
| Guided sightseeing tours in London                                     | 11 | 17 | 8  | 28 | 22 | 23 | 24 | 5  | 22%                    |
| Guided sightseeing tours outside London                                | 4  | 10 | 11 | 19 | 25 | 15 | 19 | 7  | 19%                    |
| Car hire   | 2  | 3  | 1  | 10 | 7  | 5  | 9  | 6  | 15%                    |
| Ticket to sports events  | 2  | 6  | 4  | 7  | 6  | 2  | 8  | 4  | 11%                    |
| Flights within the UK  | *  | 2  | 2  | 5  | 1  | 2  | 6  | 3  | 9%                     |

QB9: VISITORS Did you buy the following when you visited Britain and, if so, when?

Ranked on Global Average for Visitors

Base: Visitors (5700), Australia (300), Brazil (300), Canada (300), China (300), India (300), Japan (300), New Zealand (300), Russia (300), Saudi Arabia (175), South Korea (300), United Arab Emirates (125), United States (300), Denmark (300), France (300), Germany (300), Italy (300), Netherlands (300), Norway (300), Spain (300), Sweden (300)

Japan came out as the least likely to book any activity or travel. New Zealand, Canada and Australia are least likely to book coach travel, while many tourists in both Japan and New Zealand would not book tours outside London.

**LONG HAUL**

**% did/do not expect to buy the following**

**Base: Visitors**

|  | NZ | US | CA | AU | BR | RU | IN | CH | JP | SK | SA | UA |
|--|----|----|----|----|----|----|----|----|----|----|----|----|
| Ticket to sports events  | 74 | 38 | 63 | 72 | 38 | 52 | 30 | 38 | 79 | 48 | 39 | 16 |
| Flights within the UK  | 68 | 38 | 59 | 67 | 41 | 63 | 20 | 18 | 64 | 40 | 29 | 19 |
| Car hire   | 54 | 28 | 52 | 50 | 32 | 46 | 8  | 35 | 75 | 50 | 22 | 10 |
| Guided sightseeing tours outside London                                | 67 | 25 | 47 | 56 | 31 | 21 | 11 | 18 | 62 | 40 | 21 | 23 |
| Coach travel/Long distance bus in the UK                               | 63 | 39 | 57 | 66 | 28 | 21 | 20 | 11 | 59 | 42 | 21 | 22 |
| Guided sightseeing tours in London                                     | 68 | 24 | 43 | 56 | 25 | 14 | 9  | 18 | 61 | 34 | 24 | 19 |
| Ticket to theatre/musical/concert                                      | 47 | 23 | 43 | 51 | 16 | 36 | 30 | 28 | 63 | 42 | 26 | 16 |
| Train Travel (within the UK), not including underground / Oyster cards | 38 | 27 | 39 | 44 | 21 | 33 | 13 | 19 | 47 | 34 | 20 | 18 |
| Airport transfer (transport from the airport to the city centre)       | 48 | 25 | 38 | 45 | 18 | 27 | 11 | 17 | 40 | 22 | 15 | 21 |
| Tickets /passes for other tourist attractions                          | 29 | 13 | 24 | 28 | 8  | 12 | 7  | 10 | 61 | 19 | 23 | 15 |
| Transport within London e.g. underground tickets, Oyster cards         | 20 | 17 | 27 | 24 | 10 | 14 | 6  | 13 | 29 | 17 | 13 | 15 |

Q89: VISITORS Did you buy the following when you visited Britain and, if so, when?

Ranked on Global Average for Visitors

Base: Visitors (5700), Australia (300), Brazil (300), Canada (300), China (300), India (300), Japan (300), New Zealand (300), Russia (300), Saudi Arabia (175), South Korea (300), United Arab Emirates (125), United States (300), Denmark (300), France (300), Germany (300), Italy (300), Netherlands (300), Norway (300), Spain (300), Sweden (300)

Among short haul markets, Norway and Denmark are among those least likely to buy or have bought flights within the UK, car hire and coach travel



% did/do not expect to buy the following

Base: Visitors

|  |  DM |  SW |  NW |  IT |  GE |  FR |  SP |  NE | Avg all global markets |
|--|--|--|--|---|--|--|--|--|------------------------|
| Ticket to sports events  | 92   | 80   | 83   | 78  | 85   | 89   | 78   | 83   | 65%                    |
| Flights within the UK  | 96   | 88   | 96   | 73  | 87   | 88   | 80   | 88   | 63%                    |
| Car hire   | 92   | 88   | 89   | 73  | 69   | 82   | 74   | 84   | 58%                    |
| Guided sightseeing tours outside London                                | 91   | 83   | 84   | 61  | 59   | 75   | 62   | 86   | 53%                    |
| Coach travel/Long distance bus in the UK                               | 83   | 78   | 71   | 55  | 73   | 48   | 52   | 70   | 50%                    |
| Guided sightseeing tours in London                                     | 83   | 77   | 90   | 51  | 60   | 64   | 55   | 87   | 50%                    |
| Ticket to theatre/musical/concert                                      | 65   | 60   | 64   | 59  | 62   | 76   | 78   | 72   | 48%                    |
| Train Travel (within the UK), not including underground / Oyster cards | 69   | 60   | 58   | 53  | 55   | 67   | 47   | 62   | 43%                    |
| Airport transfer (transport from the airport to the city centre)       | 39   | 38   | 60   | 19  | 50   | 59   | 25   | 66   | 35%                    |
| Tickets /passes for other tourist attractions                          | 42   | 47   | 45   | 32  | 39   | 36   | 27   | 44   | 29%                    |
| Transport within London e.g. underground tickets, Oyster cards         | 34   | 29   | 34   | 16  | 31   | 23   | 19   | 44   | 22%                    |

QB9: VISITORS Did you buy the following when you visited Britain and, if so, when?

Ranked on Global Average for Visitors

Base: Visitors (5700), Australia (300), Brazil (300), Canada (300), China (300), India (300), Japan (300), New Zealand (300), Russia (300), Saudi Arabia (175), South Korea (300), United Arab Emirates (125), United States (300), Denmark (300), France (300), Germany (300), Italy (300), Netherlands (300), Norway (300), Spain (300), Sweden (300)

## SUMMARY OF HOLIDAY BOOKING

- When booking a holiday there is an **even split between those who book both travel and accommodation separately or together**, although short haul visitors are more likely to book separately compared to long haul visitors.
- **Travel/accommodation bookings are mostly done directly** with the transport operator or accommodation provider. On the other hand, **holidays** (travel & accommodation packages) are most popularly **booked indirectly through travel agents**, although some (especially younger travellers) also book directly with the transport operator or accommodation provider.
- Most of these **bookings are done online using laptops/desktops**. However, younger travellers are more likely than their older counterparts to use their smartphones or tablets to make bookings.
- When **travel and accommodation are booked separately, online-only operators are the most popularly used** (particularly in short haul markets). **Traditional tour operators** are also **used in addition to book holiday packages**.

## SUMMARY OF HOLIDAY BOOKING

- **Online agencies/comparison sites** are largely used to **compare prices, find a destination within budget and find the lowest price**. As expected, long haul visitors appear to be driven most by these influencers as they have a higher fare due to the distance travelled.
- Forward planning is on most people's agenda, especially for long haul travellers who like to plan their trip carefully before they leave. People tend to **pre-book some activities such as airport transfers, flights within the UK, tickets for tourist attractions and theatre/concert tickets**. However, there is a gap between what considerers expect to buy and what visitors actually buy. Generally, the activities which are **least popular to book are flights within the UK, car hire or tickets to sporting events**.



# VisitBritain Decisions and Influences

December 2016