



VisitBritain Decisions and Influences

December 2016

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Research Background

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)
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)
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

- **Structure:** This report is divided into three main sections, covering the themes of Britain and Competitors, Holiday Research and Planning, and Holiday Booking. These are divided into subsections which each include a summary of key points.
- **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.



Britain and Competitors

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?

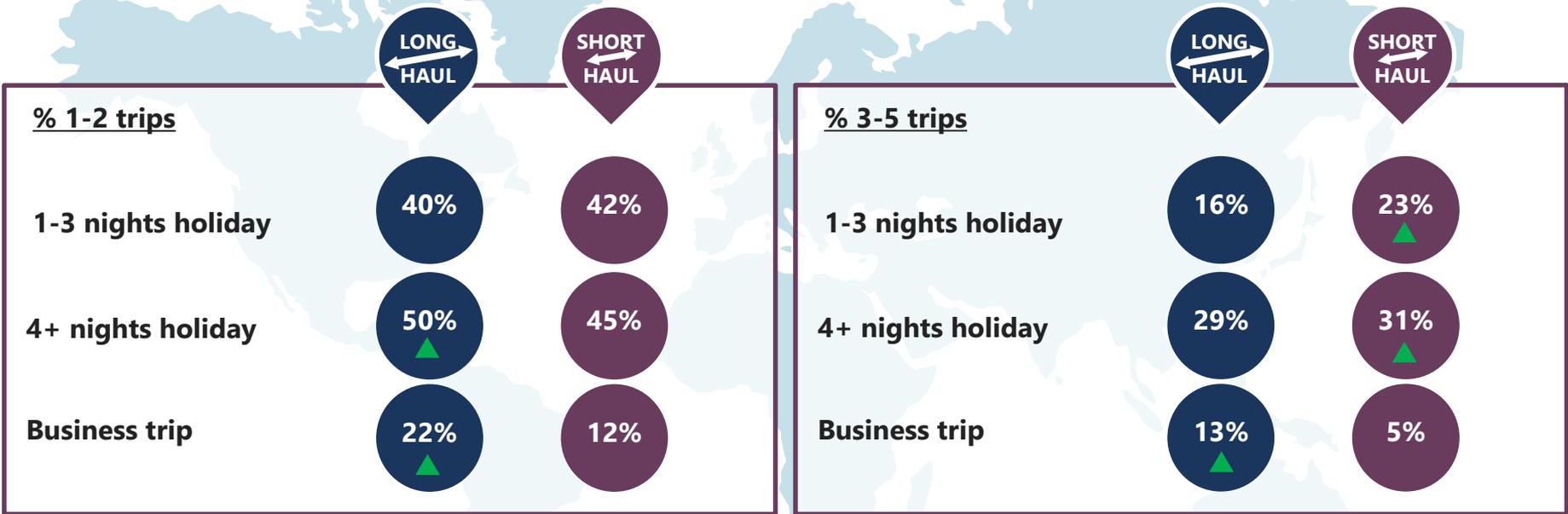
- Overall, **travellers take more holidays of 4+ nights** than 1-3 nights. Short haul markets take shorter duration trips more often than long haul markets, with 23% of respondents from short haul markets taking 3-5 such trips in the past 3 years, while long haul markets take more longer duration holidays 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%)

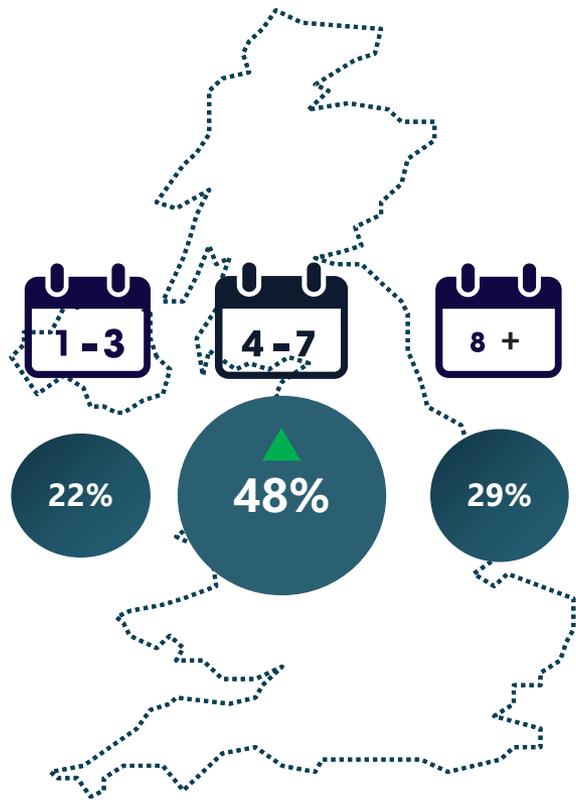
Note: Market level data in appendix

▲ ▼ significantly higher/ lower @ 95% confidence level

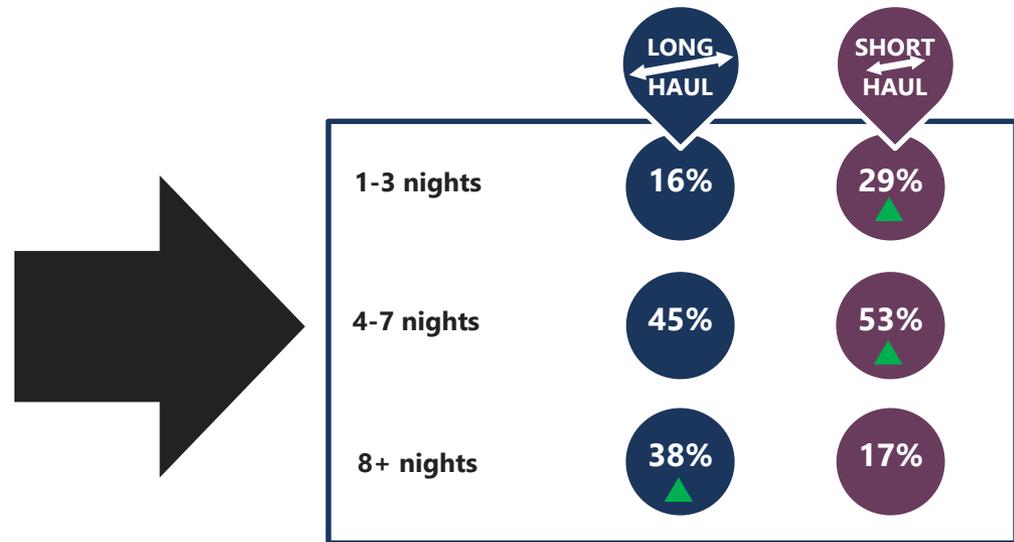
Just under half of holidays to Britain are for 4-7 nights. This is highest for short haul markets, where over half are for this duration. Over a third (38%) of long haul markets visited the UK for more than 8 nights.

Q: How long was your holiday to Britain?

Base: Visitors



Length of Holiday to Britain (nights)



Note: Market level data in appendix

QC8 How long was your holiday to Britain?

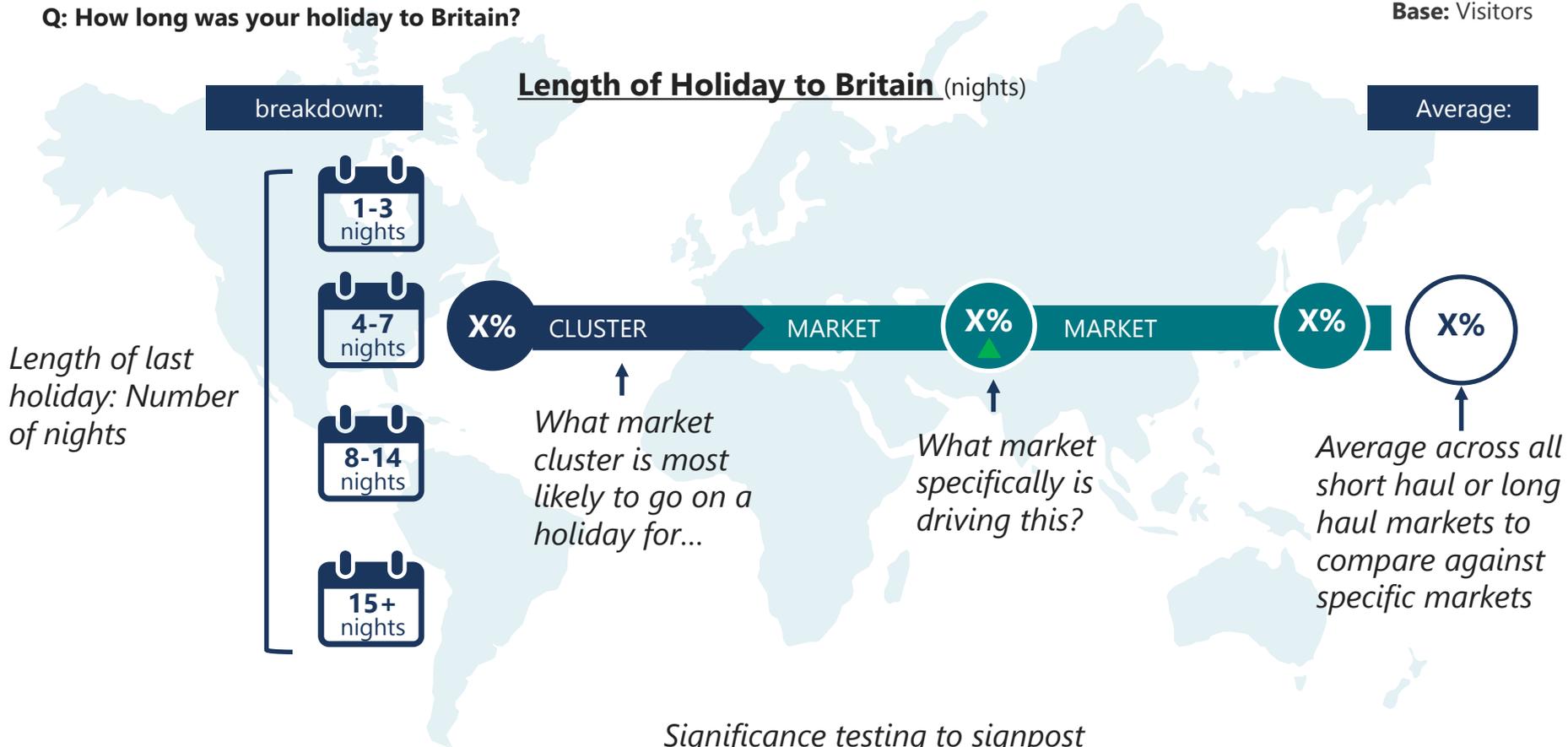
Base: Visitors (5700), Long haul (6600), Short haul (4800)

▲ ▼ 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

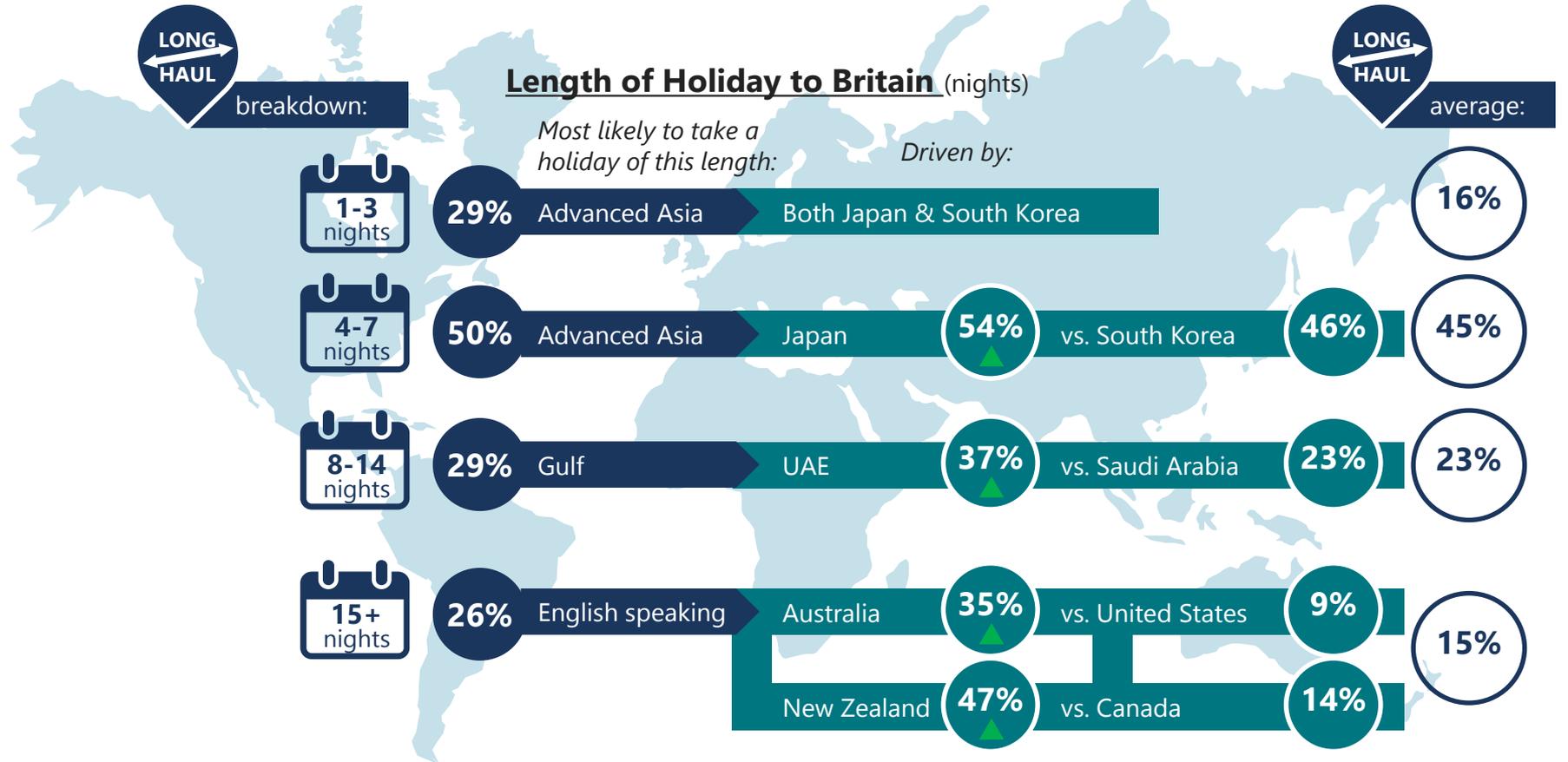


Advanced Asia – not sure if this is easily understood. Would be better to just list the markets maybe?

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

Q: How long was your holiday to Britain?

Base: Visitors



Note: Market level data in appendix

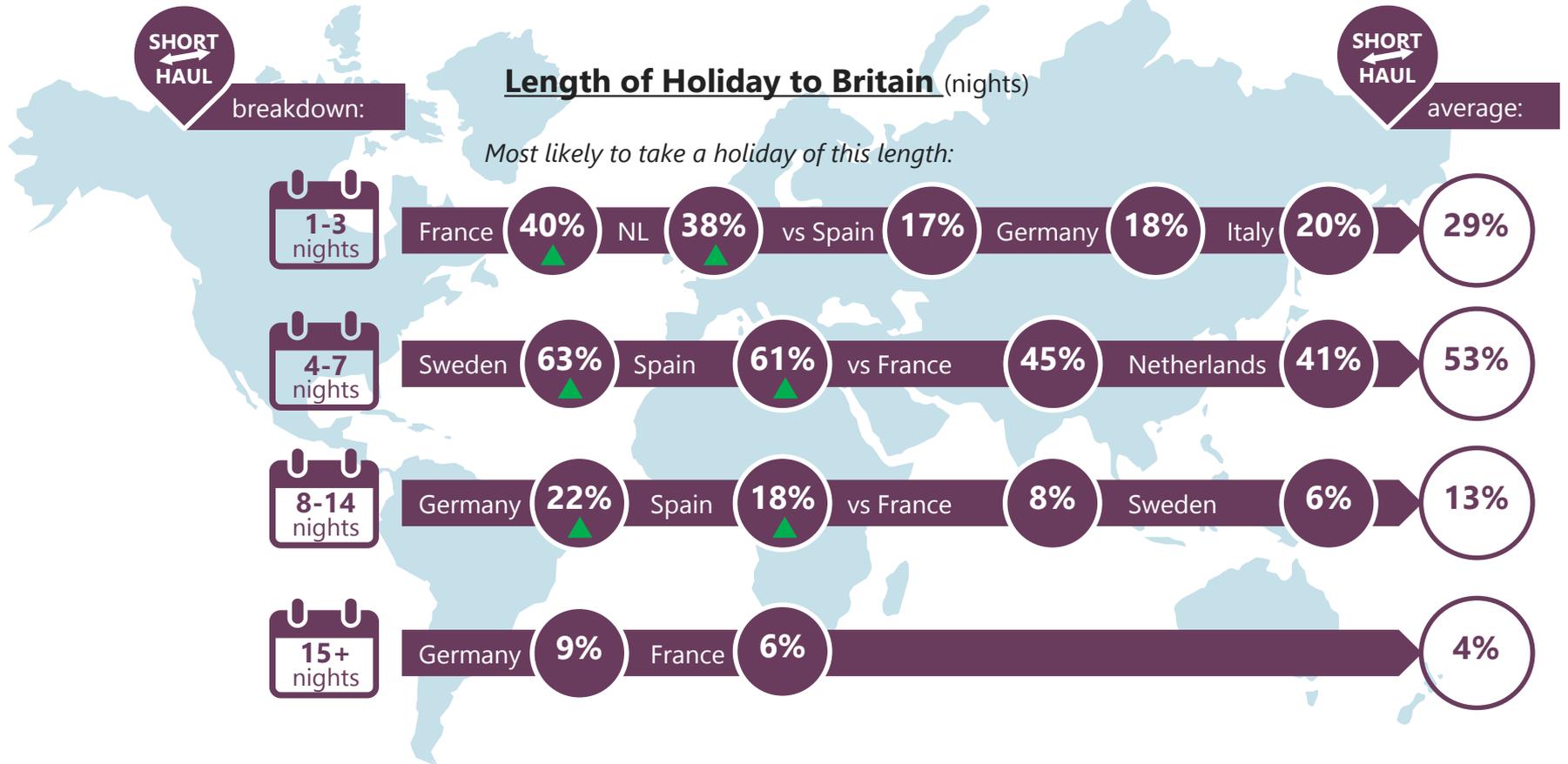
QC8 How long was your holiday to Britain?

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



Note: Market level data in appendix

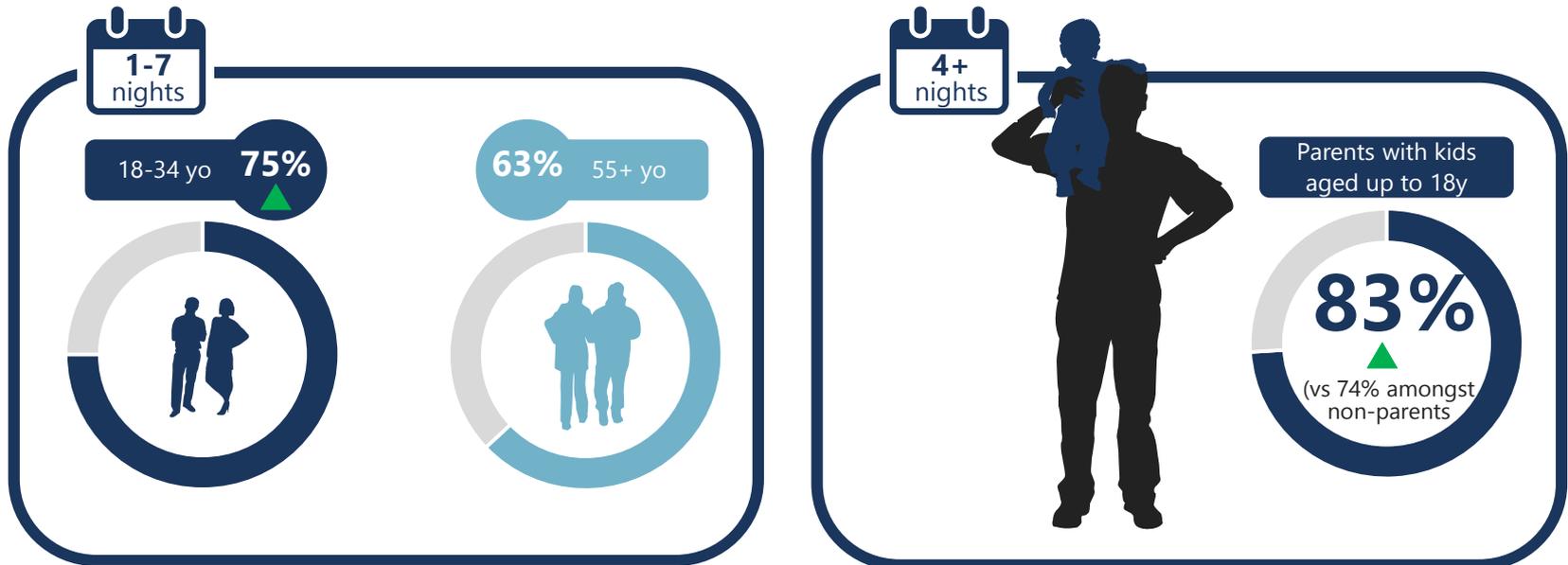
QC8 How long was your holiday to Britain?
Base: Visitors (300) for all countries

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

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

Base: Visitors (5700)

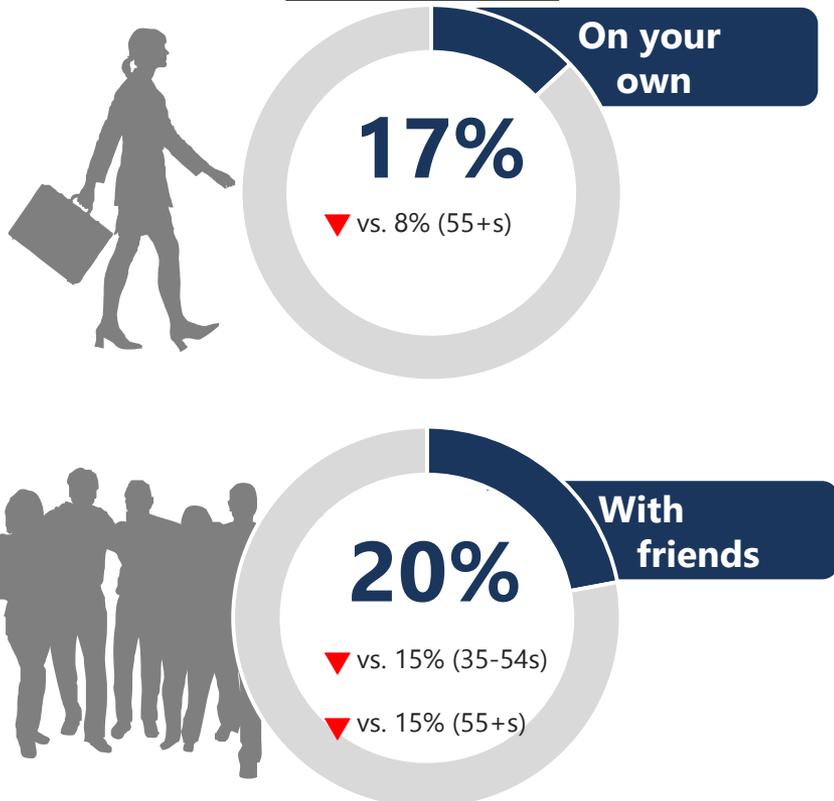
▲ ▼ significantly higher/ lower @ 95% confidence level

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.

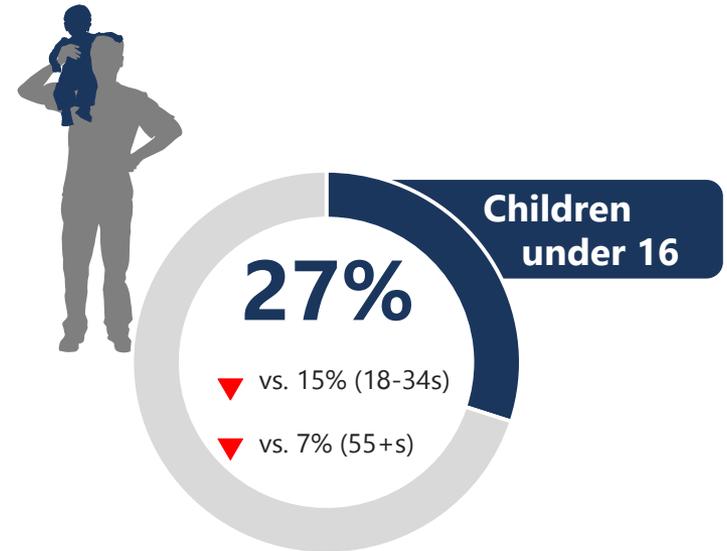
Base: Visitors

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

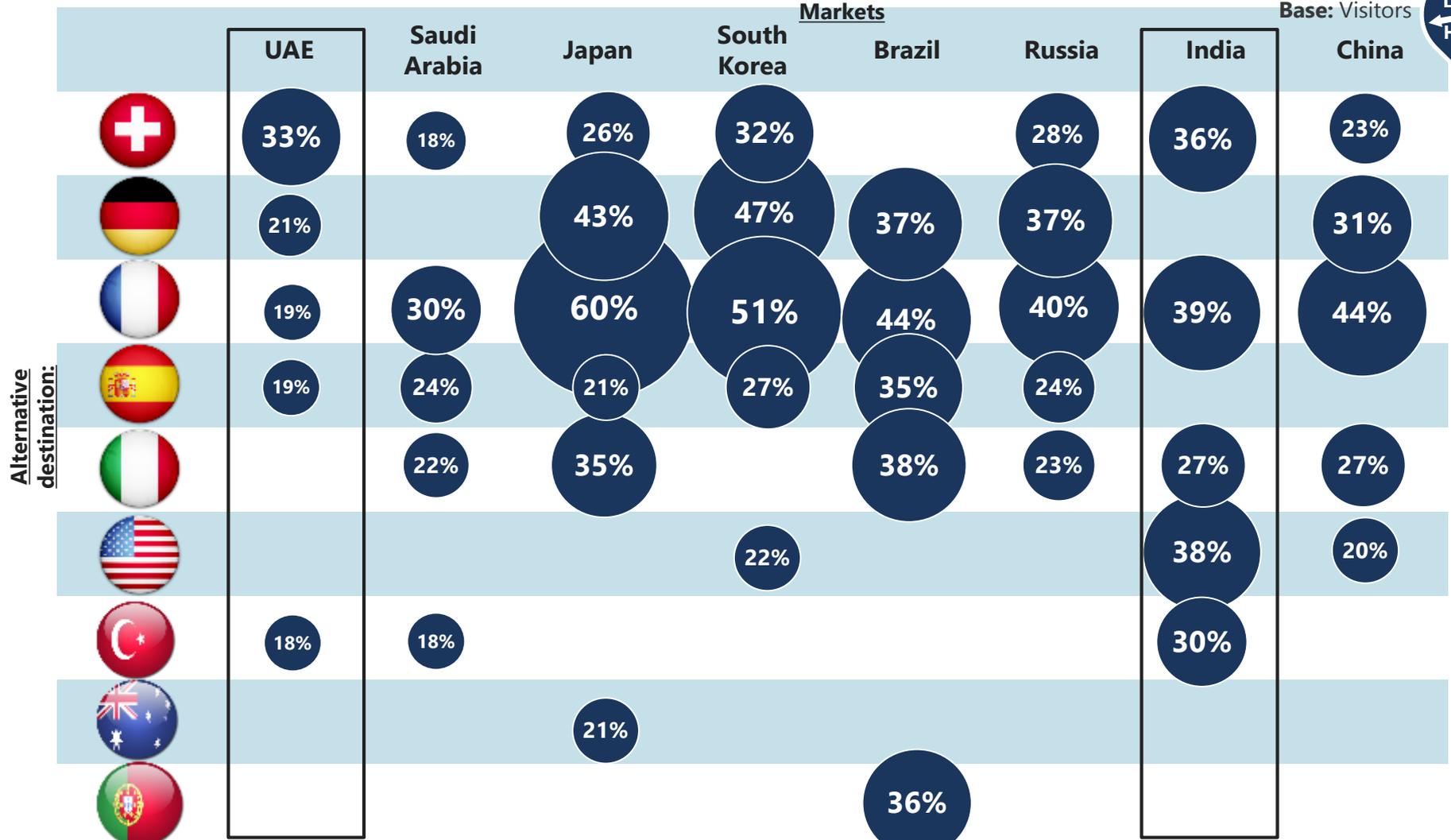
Base: Visitors

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.



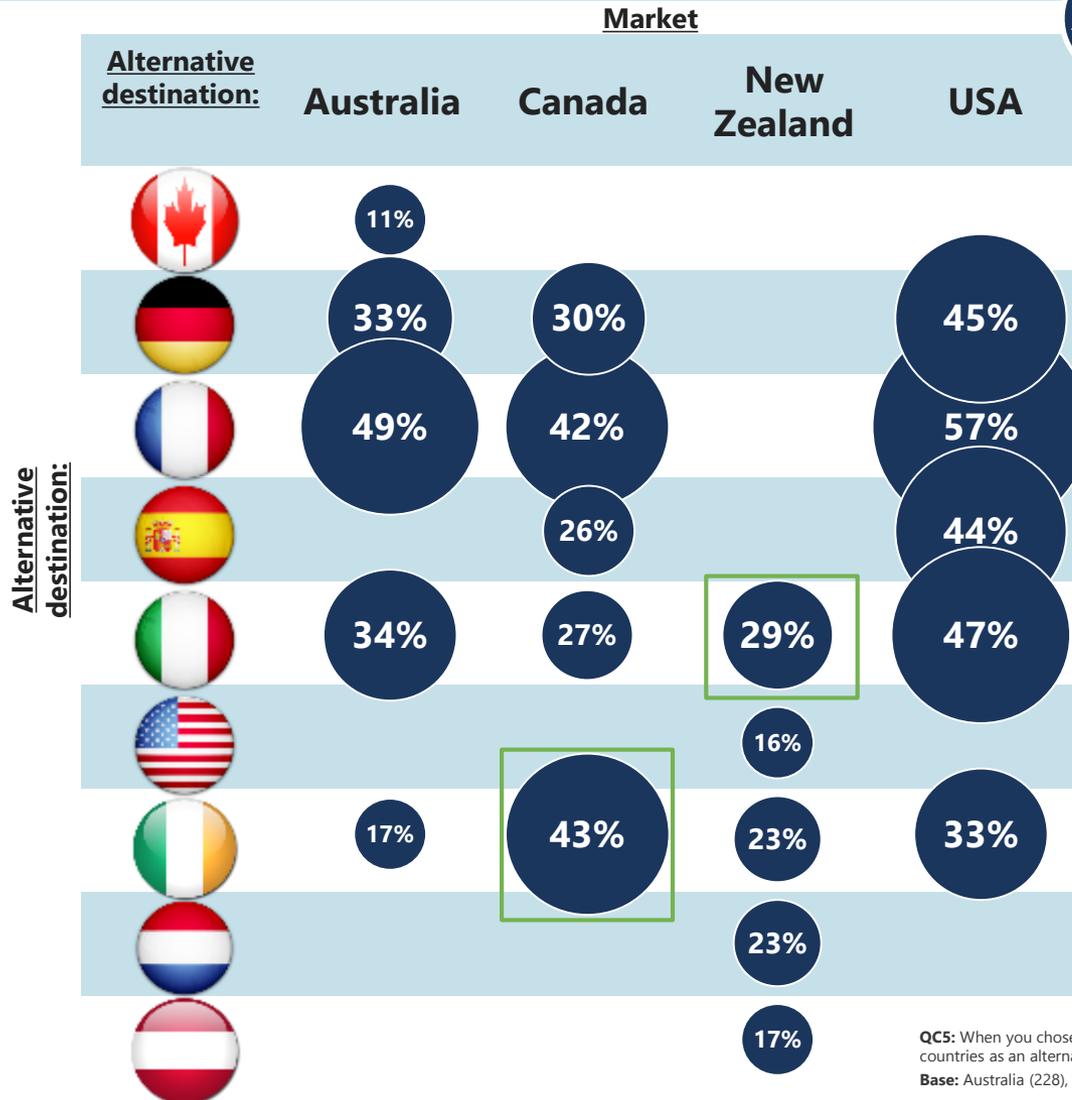
QCS: When you chose to visit Britain on holiday, did you consider any of the below countries as an alternative destination for that trip?

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



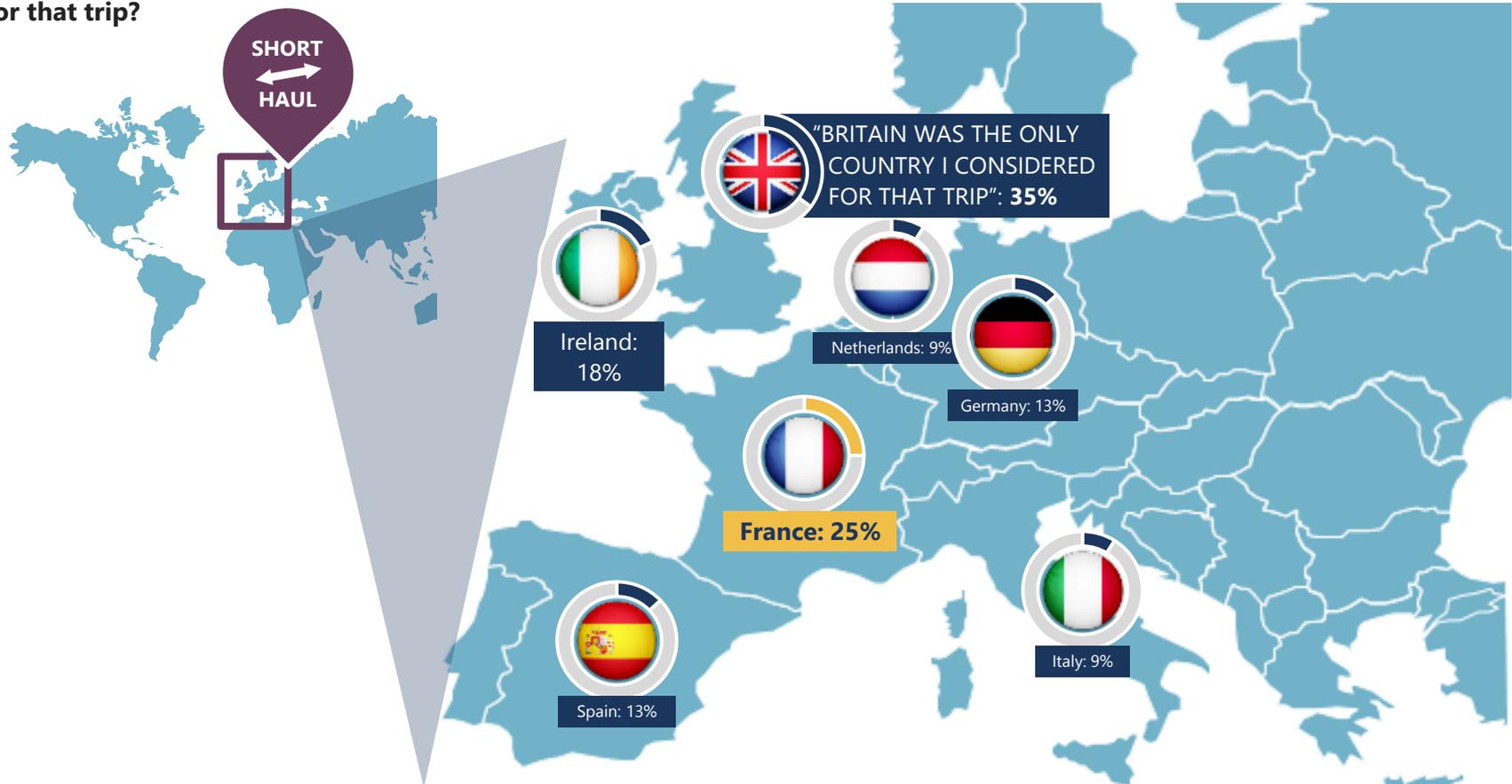
QC5: When you chose to visit Britain on holiday, did you consider any of the below countries as an alternative destination for that trip?

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?



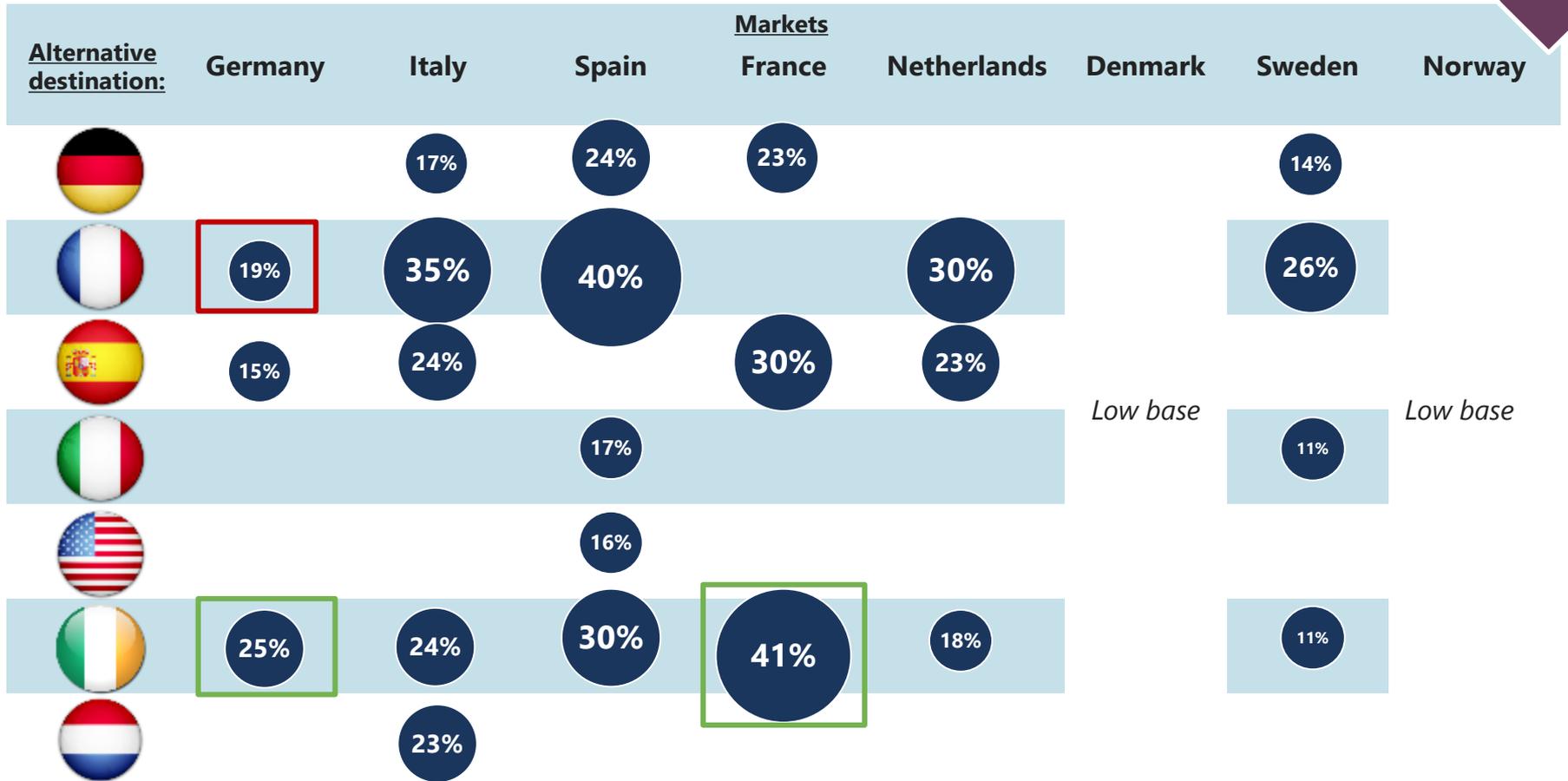
QCS: When you chose to visit Britain on holiday, did you consider any of the below countries as an alternative destination for that trip?

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)



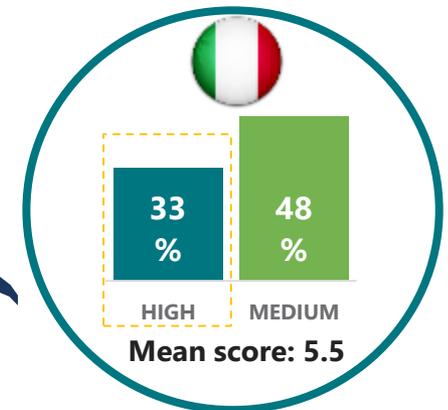
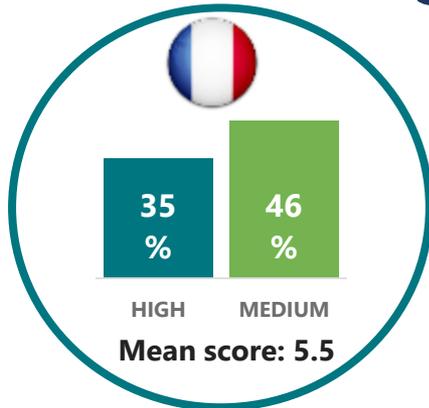
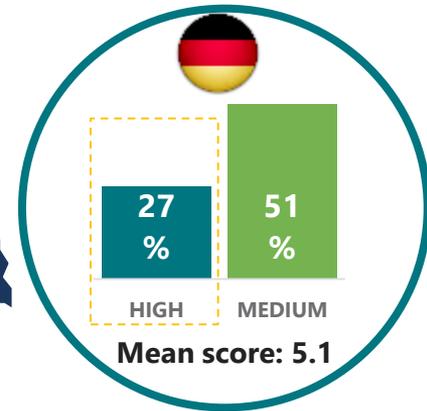
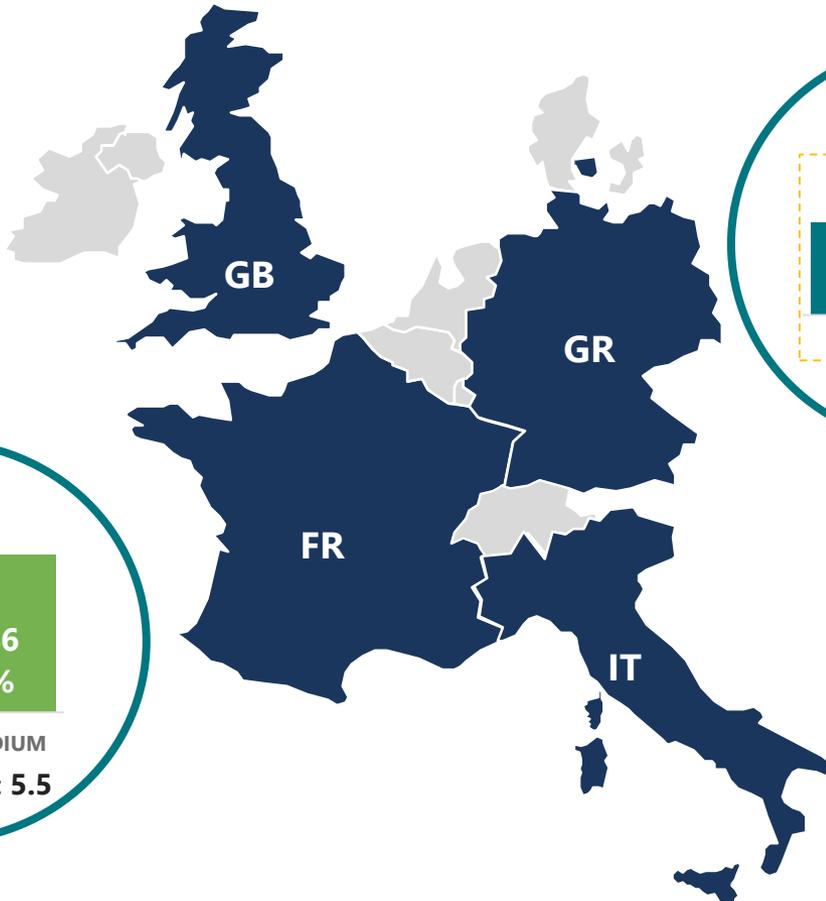
#3 SUMMARY

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

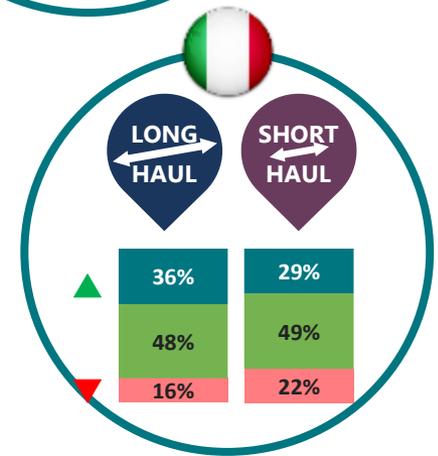
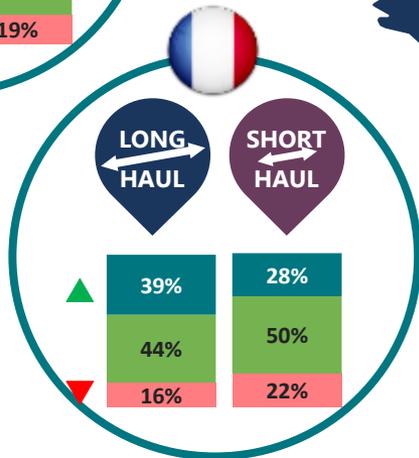
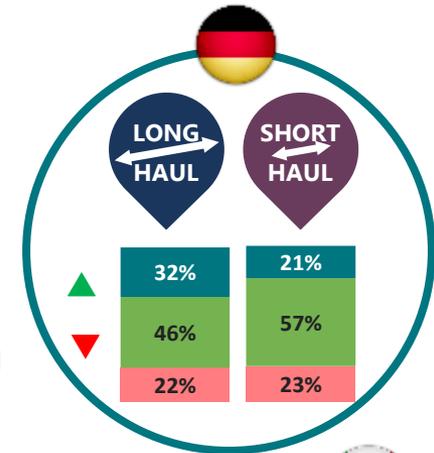
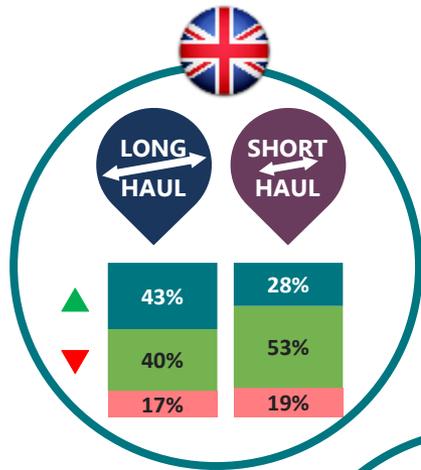
Need to double check this as intuitively short haul markets should have a better knowledge...

When comparing Britain and its key competitors, we see the same trend – long 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



% 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%



	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.



Researching and Planning a holiday

What will we cover within 'Holiday Research & Planning' section?

This section focusses on information around the holiday research and planning phase. We will cover the following questions:

1. Who does what across the different holiday planning phases?

a. Who is likely to be involved at each stage of the holiday planning process?

Overall breakdown by each planning stage; differences by different demographics and market clusters

2. Why visit Britain or other holiday destinations?

a. What are the key motivators for travellers to select a holiday destination/Britain?

Top influencers; differences by market clusters and demographics if applicable

3. What are the key information sources when deciding a holiday to Britain?

a. What online sources most influence choice of holiday destination?

Top online influencers; differences by markets if applicable

b. What other sources influence travellers' choice of holiday destination?

Top offline influencers; differences by markets if applicable

4. When did people plan and book their holiday to Britain?

a. How far in advance do people start thinking, decide on their destination and look at price options for their holiday?

Overall breakdown of each planning stage vs. months in advance of holiday; differences by markets/clusters if applicable

b. When do people book their holiday to Britain?

Overall breakdown of stage vs. months in advance of holiday; differences by markets/clusters

#1 SUMMARY



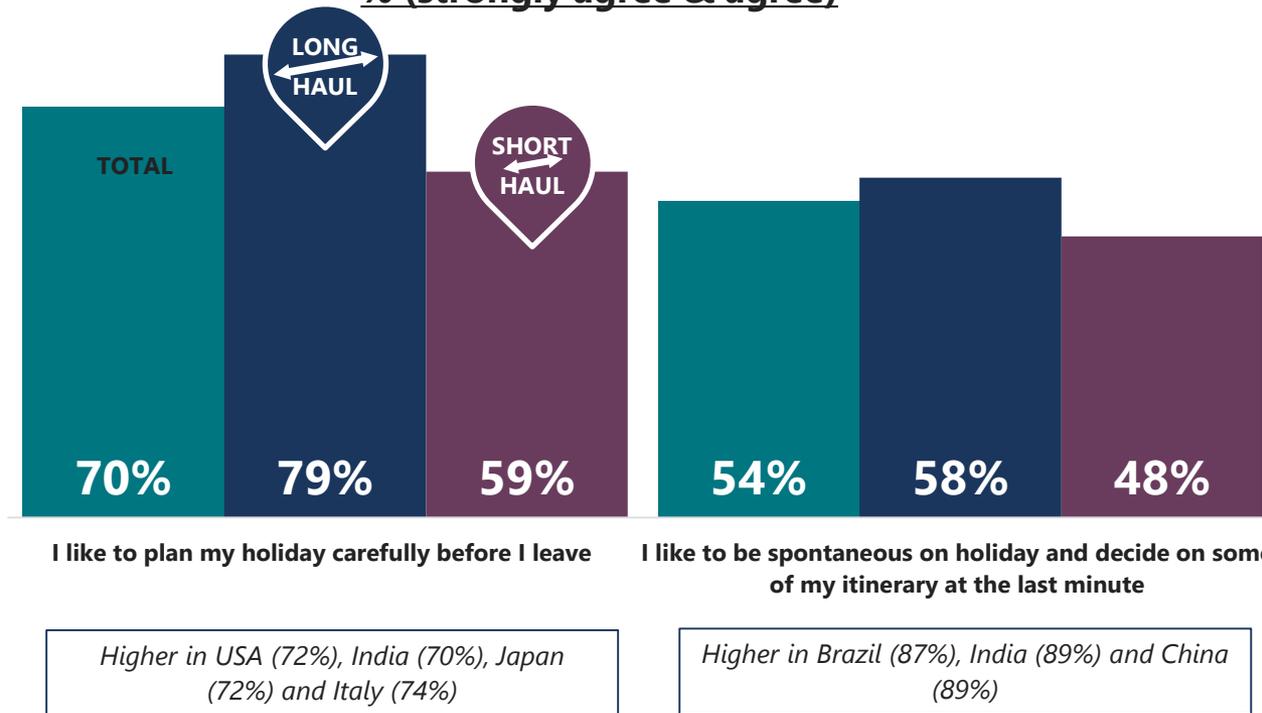
Who is responsible across the different holiday planning phases?

- Researching and booking of a holiday is more likely to be done by the individual whereas shortlisting and finalising destinations is more likely to be a joint responsibility.
- However, this varies by markets - long haul travellers are more likely to research destinations and make the final choice on their own whereas short haul travellers are more likely to involve travel companions whilst making the final choice.
- Overall holiday finalisation (making the final choice or booking) is male skewed – specifically in Japan, Russia, India, Gulf & France. At the global level there are no gender skews for the 'research' and 'shortlist destinations' phases.
- 70% globally say that "I like to plan my holiday carefully before I leave". Sweden and Netherlands are the two countries where fewer than half claim to be careful pre-planners; here, respondents are more likely to say that "I like to be spontaneous on holiday and decide on some of my itinerary at the last minute".

The vast majority of long haul travellers like to plan their holiday carefully in advance, especially travellers from Brazil, India and China. However, over half of travellers still like to be spontaneous when deciding on their itinerary.

Base: Visitors & Considerers

To what extent do you agree with the following statements about holidays?
 % (strongly agree & agree)



QR8: To what extent do you agree with the following statements about holidays?

Base: All participants (1140), Long Haul total (6600), Short Haul Total (4800)

Whilst most markets prefer planning their holiday, US, India, Japan, UAE, Norway & Netherlands are also equally spontaneous in their holiday planning.

Base: Visitors & Considerers

To what extent do you agree with the following statements about holidays?
% (Strongly agree & agree)

LONG HAUL

	NZ	US	CA	AU	BR	RU	IN	CH	JP	SK	SA	UA
I like to be spontaneous on holiday and decide on some of my itinerary at the last minute	54	72	62	50	61	50	70	45	72	46	59	57
I like to plan my holiday carefully before I leave	71	83	73	75	87	80	89	89	69	78	74	67

SHORT HAUL

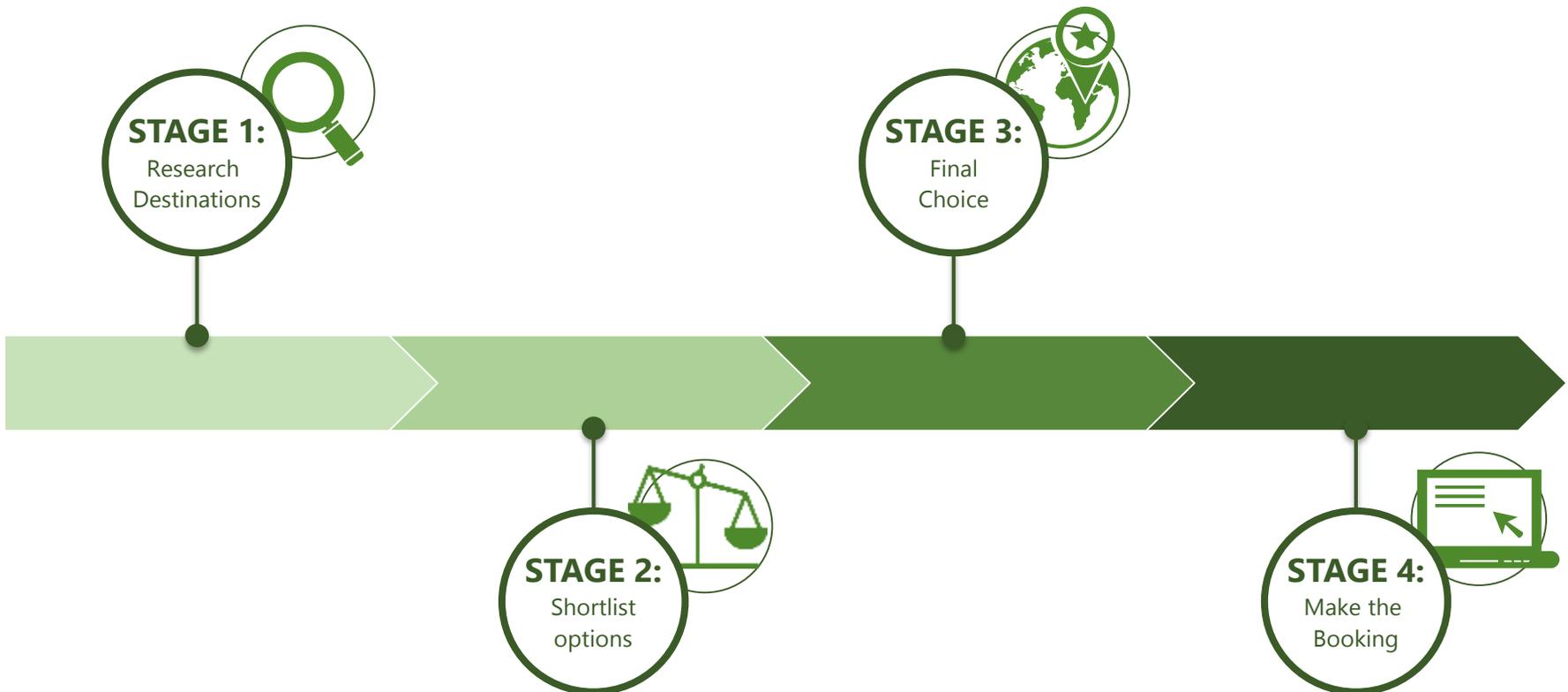
	DM	SW	NW	IT	GE	FR	SP	NE	Avg all global markets
I like to be spontaneous on holiday and decide on some of my itinerary at the last minute	42	53	33	55	38	56	58	53	54%
I like to plan my holiday carefully before I leave	58	48	56	74	68	65	73	28	70%

Top per market Highlighted

QR8: To what extent do you agree with the following statements about holidays?

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), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

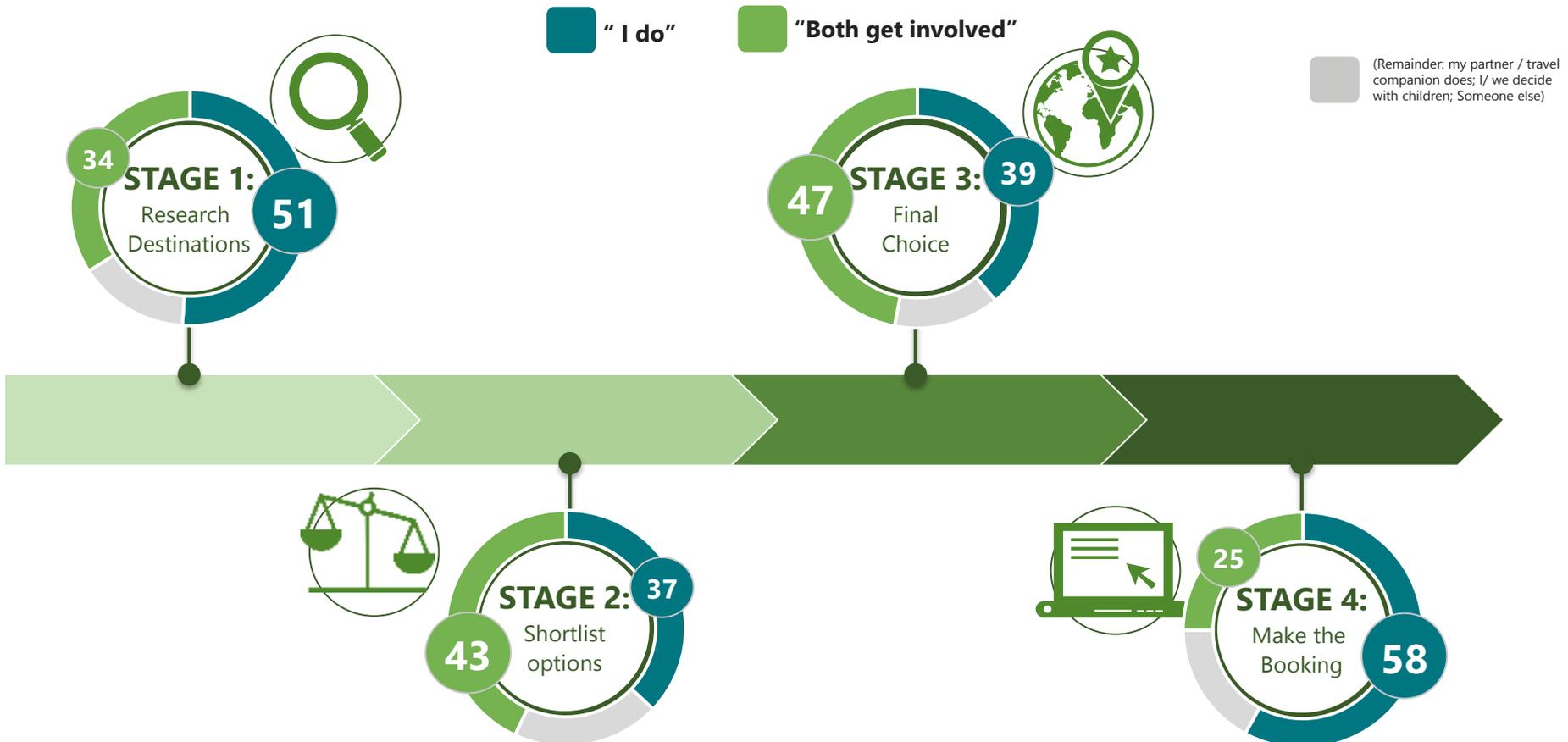
There are four key stages when travellers are planning a holiday...



When looking at responsibilities over the holiday planning process, 'researching' and 'booking' are done by individuals, whereas shortlisting and finalising a destination are done in consultation with travel companion.

Q: Who is most likely to do the following when it comes to your holidays?

Base: Visitors & Considerers



Note: Market level data in appendix

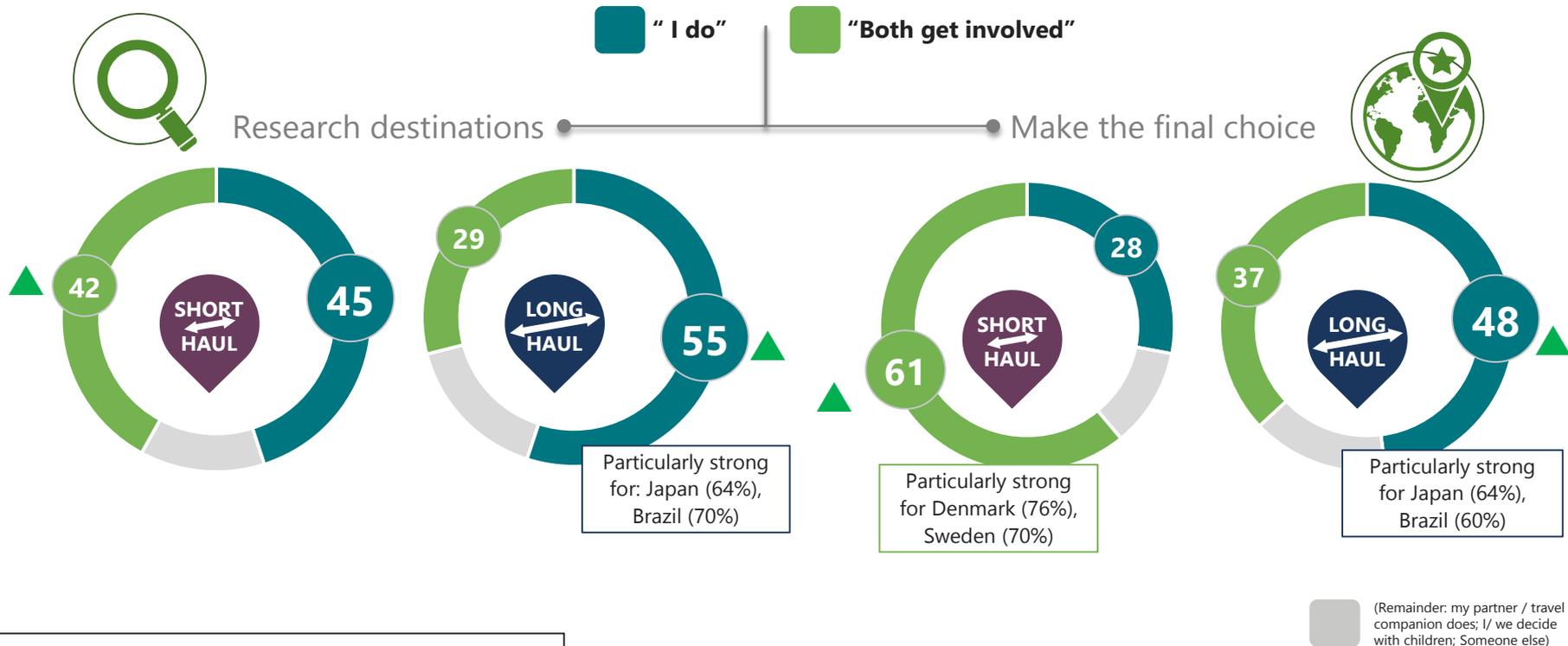
QR1: Who is most likely to do the following when it comes to your holidays?

Base: All participants (1140)

But this trend changes by markets – short haul travellers are more likely to research destinations in consultation and long haul travellers are more likely to make the final choice on their own.

Base: Visitors & Considerers

Q: Who is most likely to do the following when it comes to your holidays?



Similar trend for 'shortlisting' destinations

Note: Market level data in appendix

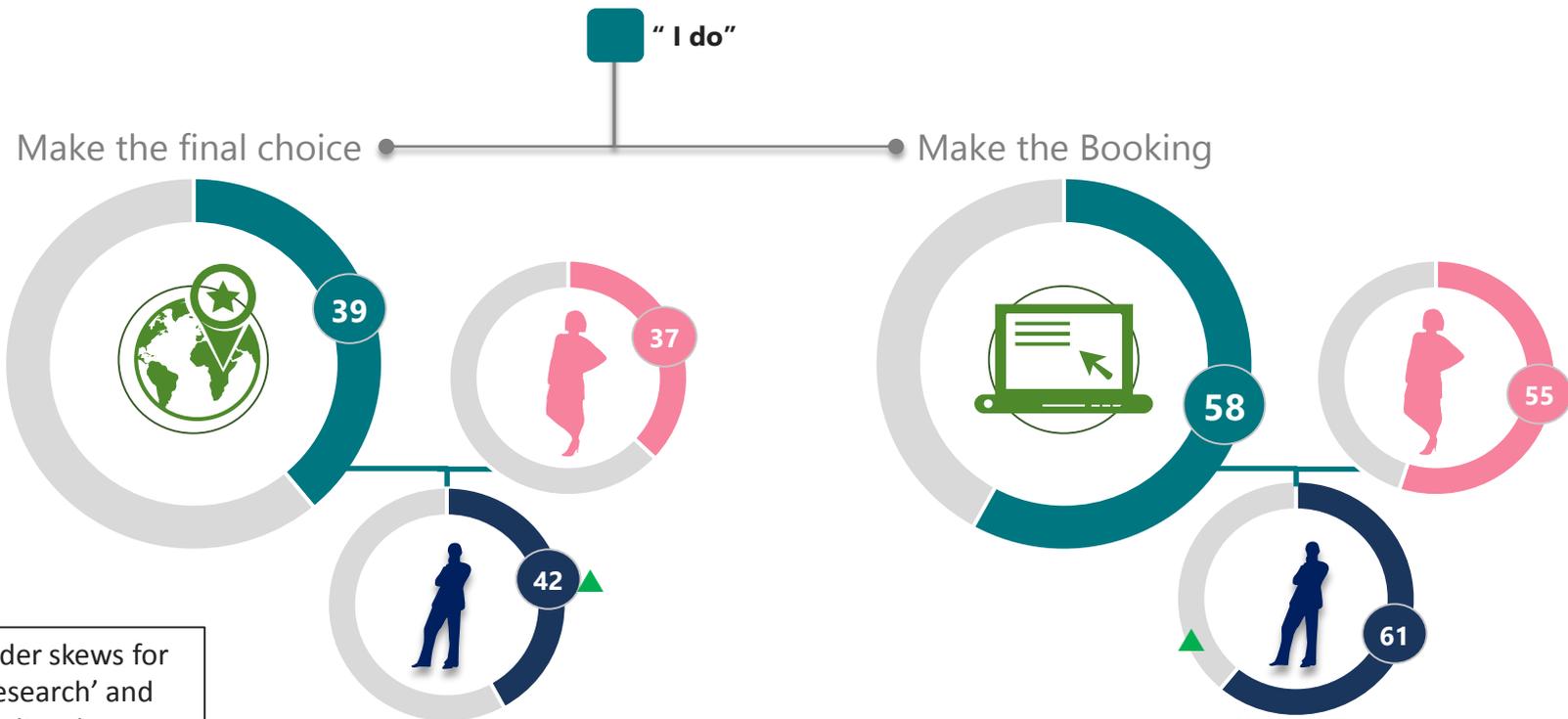
QR1: Who is most likely to do the following when it comes to your holidays?
 Base: All participants (1140), Long Haul total (6600), Short Haul Total (4800)

▲▼ significantly higher/ lower @ 95% confidence level

Looking at these stages by demographics, finalising a holiday (final choice and booking) is slightly more likely to be done by men than women – but varies by market (see appendix)

Base: Visitors & Considerers

Q: Who is most likely to do the following when it comes to your holidays?



No gender skews for the 'research' and 'shortlist phase'

Note: Market level data in appendix

▲ ▼ significantly higher/ lower @ 95% confidence level

QR1: Who is most likely to do the following when it comes to your holidays?
 Base: All participants (1140), Male (5825), Female (5575)

Looking within individual markets, Japan, Russia, the Gulf & India are the countries where men are most likely to finalise the holiday.

Q: Who is most likely to do the following when it comes to your holidays?

Base: Visitors & Considerers

Who makes the **final choice**?

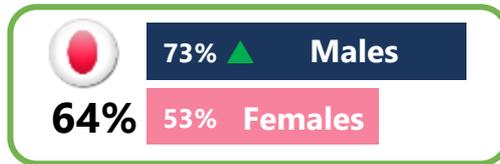
Who makes the **booking**?

Who is driving this?

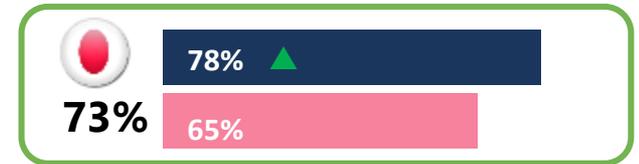
Who is driving this?

% 'I do' across countries

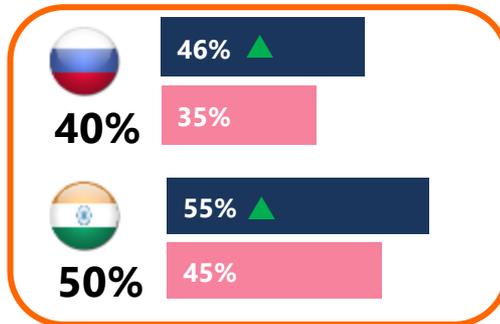
Advanced Asia



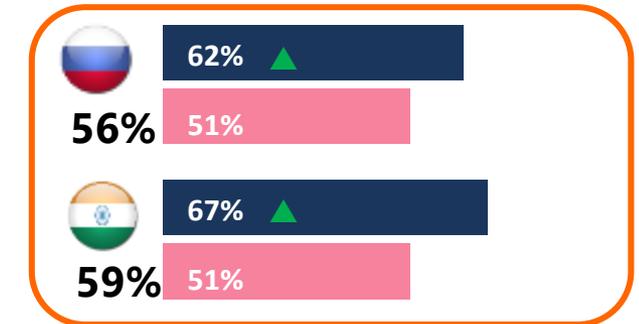
Advanced Asia



Emerging Markets



Emerging Markets



Gulf



Gulf



"My travel partner does it"

Note: Market level data in appendix

QR1: Who is most likely to do the following when it comes to your holidays?

Base: All participants (1140), Make the final choice - Japan (Males: 343, Females: 257), Russia (Males: 283, Females: 317)
Make the booking - Japan (Males: 343, Females: 257), Russia (Males: 283, Females: 317), India (Males: 306, Females: 294)

Key: Male / Female

▲ ▼ significantly higher/ lower @ 95% confidence level

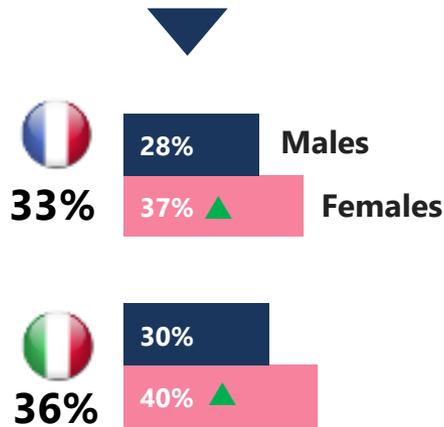
Within short haul markets, women are more likely to make the final choice & booking in France, whereas making the booking is more male dominated within Denmark, Netherlands & Germany.

Q: Who is most likely to do the following when it comes to your holidays?

Base: Visitors & Considerers

Who makes the **final choice**?

Who is driving this?

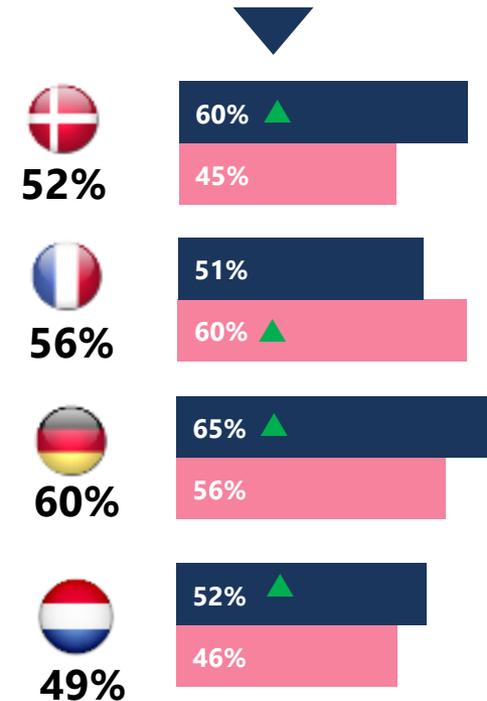


Other short haul markets have a similar proportion between males & females

% 'I do' across countries

Who makes the **booking**?

Who is driving this?



Other short haul markets have a similar proportion between males & females

Key: Male / Female

Note: Market level data in appendix

QR1: Who is most likely to do the following when it comes to your holidays?

Base: All participants (1140), Make the final choice - France (Males: 269, Females: 331), Italy (Males: 280, Females: 320)

Make the booking - Denmark (Males: 296, Females: 304), France (Males: 269, Females: 331), Germany (Males: 307, Females: 293), Netherlands (Males: 298, Females: 302) ▲ ▼ significantly higher/ lower @ 95% confidence level

#2 SUMMARY



Why visit Britain or other holiday destinations?

- **Britain's cultural attractions** are the **strongest motivator** both for visitors and those considering visiting.
- **Holiday deals, countryside and variety of places to visit follow as other key motivators** for travellers - this remains broadly **similar** between **long haul/ short haul** as well as **past visitors to Britain and those considering to visit Britain**
- However, **'deals' are a more important** motivator **for considerers** than for previous visitors
- **Vibrant cities and ease of travel** to destination are also important consideration for **short haul markets** (city breaks - as they take more shorter trips) **whereas security, accommodation and range of activities** are more **important for long haul travellers (since they take longer trips)**
- **There is also variation across markets:**
 - UAE, Netherlands, Spain & Netherlands give more importance to 'good deals'
 - Climate is the most important factor for Gulf travellers
 - Brazilians give more importance to experience 'different culture'
 - Visiting family/friends is an important driver for New Zealand & Australia

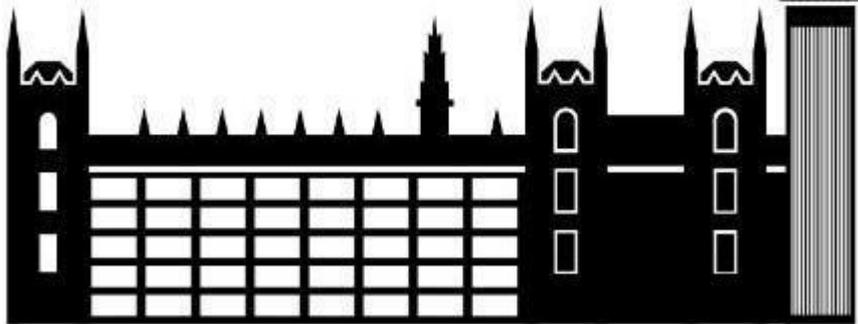
'Cultural attractions' are the most important motivator for travellers to visit Britain – this is even more important for females and older age groups.

Base: Visitors & Considerers

Q: When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain?
Which of the following would be the most important motivators for you to visit Britain on holiday in the future?

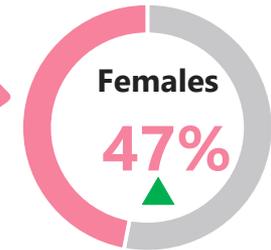
Top reasons to visit Britain/holiday destination

Cultural attractions
(historic buildings, famous sights etc.)

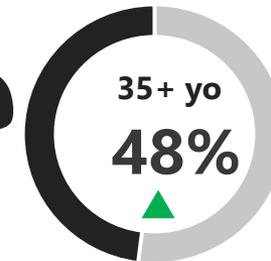


Note: Market level data in appendix

Driven by:



vs Males
(42%)



vs 18-34yo
(38%)

QR6 (Visitors): When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain? Please choose up to seven. (Considerers): Which of the following would be the most important motivators for you to visit Britain on holiday in the future? Please choose up to seven.

Base: All participants (11,400), Male (5825), Females (5575), 35+ (7142), 18-34 (2129)

▲ ▼ significantly higher/ lower @ 95% confidence level

Whilst cultural attractions remain the key motivators, good deals, countryside, and a variety of local places are also important for both visitors and considerers (although 'price and deals' are not as important for visitors).

Base: Visitors & Considerers

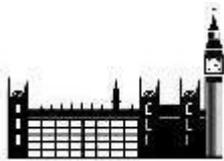
Q: When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain?
Which of the following would be the most important motivators for you to visit Britain on holiday in the future?

Top reasons to visit Britain/holiday destination

#1

18-24 yrs: 40%; 65-74 yrs: 54%

Cultural attraction



Considerers:
47% ▲

vs Visitors (42%)

#3

18-24 yrs: 21%; 65-74 yrs: 37%

Countryside & natural beauty



Considerers:
31% ▲

vs Visitors (22%)

#5

Wanted to go somewhere new



Considerers:
28% ▲

vs Visitors (23%)

18-24 yrs.: 32%; 65-74 yrs.: 22%

#2

Good deals (flights, package etc.)



Considerers:
32% ▲

vs Visitors (18%)

#4

Variety of places to visit



Considerers:
29% ▲

vs Visitors (25%)

The same pattern seen for both long haul and short haul markets

Note: Market level data in appendix

QR6 (Visitors): When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain? Please choose up to seven. (Considerers): Which of the following would be the most important motivators for you to visit Britain on holiday in the future? Please choose up to seven.

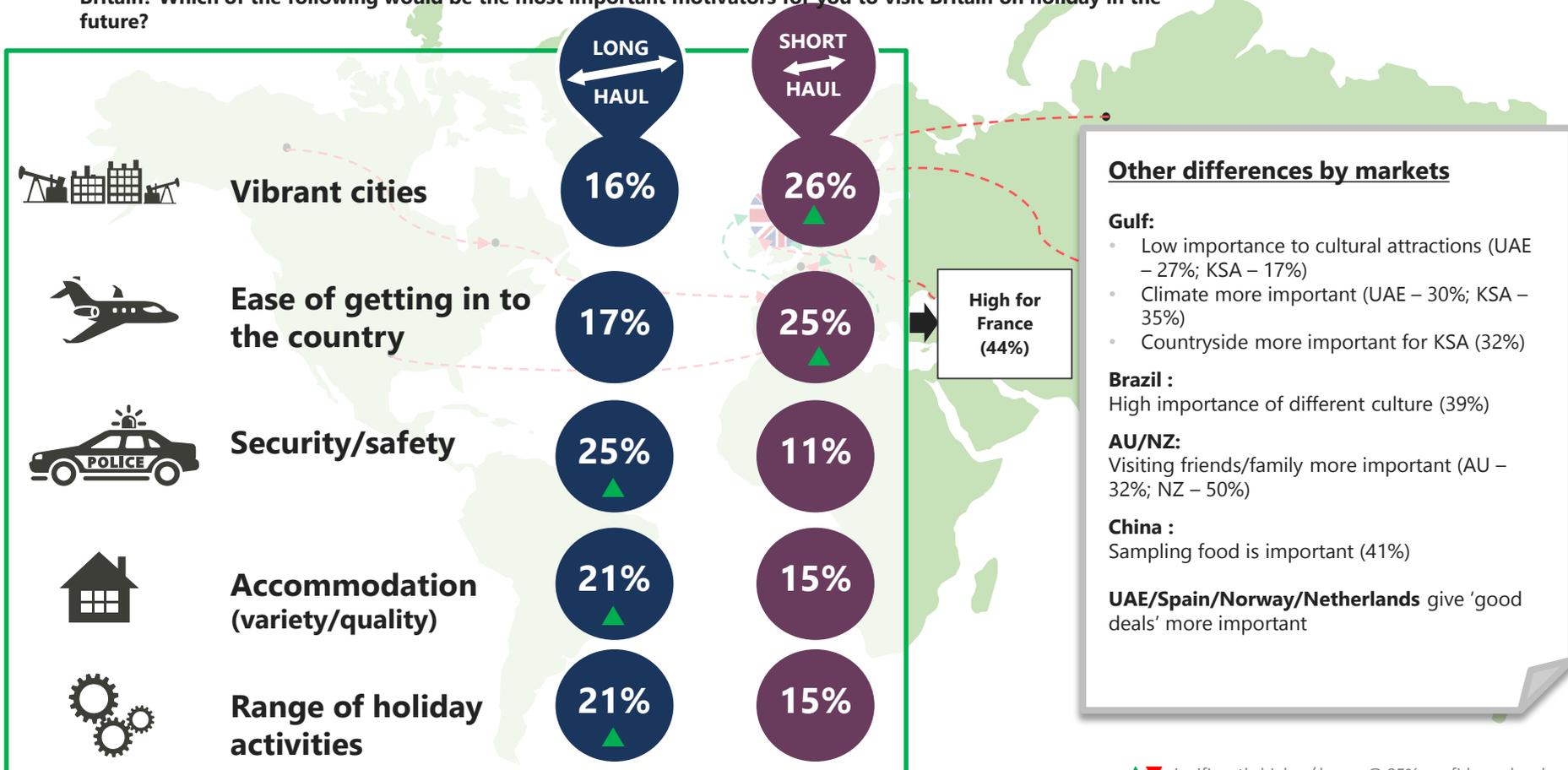
Base: Total (11,400), Visitors (5700), Considerers (5700)

▲ ▼ significantly higher/ lower @ 95% confidence level

Whilst the top motivators remain the same for both short and long haul markets, vibrant cities and ease of travel to destination are more of an influencer for short haul markets who are more likely to do a city break. Long haul markets are more inclined towards destinations that provide overall wellbeing and a range of activities.

Q: When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain? Which of the following would be the most important motivators for you to visit Britain on holiday in the future?

Base: Visitors & Considerers



▲ ▼ significantly higher/ lower @ 95% confidence level

QR6 (Visitors): When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain? Please choose up to seven. (Considerers): Which of the following would be the most important motivators for you to visit Britain on holiday in the future? Please choose up to seven.
 Base: All participants (11,400), Long haul (6600), Short haul (4800)

Most travellers are attracted to cultural attractions but there are differences by markets - 'visiting family/friends' is important for NZ/AU, 'different culture' is important to Brazilians and climate is important for Gulf travellers.

Q: Which of the following were the most important reasons why you chose to visit Britain?/ Base: Visitors & Considerers
Which of the following would be the most important motivators for you to visit Britain on holiday in the future?

% Top reasons to visit Britain/holiday destination

Scores adjusted for market comparability (see notes)	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SKOR	SPA	SWE	USA	Gulf	Total
Cultural attractions e.g. historic buildings and famous sights	48%	36%	41%	41%	63%	46%	44%	26%	45%	52%	47%	42%	48%	42%	46%	42%	45%	33%	17%	42%
A wide variety of places to visit around the country	27%	31%	26%	21%	8%	28%	42%	33%	23%	27%	24%	29%	16%	31%	23%	22%	15%	23%	19%	25%
I'd never been before and wanted to go somewhere new	18%	23%	25%	17%	16%	23%	24%	14%	27%	32%	22%	20%	14%	44%	27%	25%	22%	17%	23%	23%
Possibility of visiting friends or relatives	44%	14%	24%	9%	24%	21%	18%	24%	17%	18%	25%	65%	28%	11%	11%	19%	24%	18%	16%	22%
Somewhere where they speak English	18%	18%	21%	11%	28%	24%	33%	17%	29%	34%	13%	17%	27%	25%	20%	28%	21%	23%	15%	22%
Easy to get around	30%	21%	23%	15%	33%	28%	20%	15%	27%	19%	16%	24%	33%	9%	20%	20%	27%	26%	16%	22%
Countryside and natural beauty	31%	18%	25%	34%	18%	14%	31%	28%	14%	24%	34%	27%	12%	14%	16%	18%	9%	22%	23%	22%
Vibrant cities	17%	9%	18%	20%	33%	29%	31%	16%	25%	13%	37%	18%	32%	11%	14%	18%	40%	20%	24%	22%
The ease of getting to the country	21%	10%	16%	16%	34%	46%	17%	20%	21%	20%	22%	23%	34%	13%	11%	25%	30%	15%	16%	21%
A mix of old and new	26%	21%	22%	9%	21%	14%	21%	14%	21%	12%	13%	24%	23%	27%	22%	18%	26%	18%	17%	19%
A culture that is different from our own	8%	31%	15%	25%	13%	30%	16%	18%	25%	26%	23%	8%	5%	22%	25%	21%	7%	15%	20%	19%
A good deal e.g. on flights, total holiday package	18%	12%	14%	25%	15%	19%	15%	20%	21%	12%	26%	17%	25%	15%	23%	25%	10%	16%	21%	18%
Sampling the local food and drink	13%	20%	24%	37%	22%	18%	17%	14%	10%	15%	16%	12%	11%	24%	13%	12%	21%	18%	19%	18%
Contemporary culture (e.g. music, films, art, literature)	10%	23%	15%	24%	23%	16%	13%	13%	19%	19%	13%	10%	16%	14%	20%	17%	32%	19%	19%	18%
Security / safety	15%	26%	26%	22%	4%	6%	9%	23%	12%	32%	7%	13%	11%	13%	23%	23%	9%	22%	21%	17%
Easy to get plan/organise	16%	14%	14%	8%	26%	24%	18%	13%	21%	10%	11%	16%	32%	8%	8%	15%	23%	20%	14%	16%
Accommodation – variety and quality	12%	22%	14%	22%	7%	8%	15%	22%	14%	18%	24%	12%	13%	14%	17%	13%	11%	18%	22%	16%
A wide range of holiday activities	14%	13%	17%	10%	6%	4%	13%	20%	20%	11%	4%	14%	7%	14%	19%	19%	12%	12%	19%	13%
Meeting the local people	15%	22%	14%	7%	14%	16%	16%	13%	12%	7%	15%	13%	11%	10%	8%	13%	17%	16%	14%	13%
The cost of staying in the destination	15%	12%	11%	17%	9%	4%	7%	14%	11%	10%	17%	11%	13%	14%	13%	16%	9%	12%	15%	12%
The climate / weather	7%	17%	14%	18%	2%	3%	7%	27%	8%	14%	6%	7%	4%	18%	17%	8%	2%	14%	27%	12%
Watching sport	8%	10%	8%	14%	7%	4%	5%	12%	3%	4%	11%	8%	17%	12%	14%	6%	15%	17%	15%	10%
Visit a film or TV location	5%	9%	4%	8%	6%	4%	5%	10%	5%	5%	6%	3%	5%	26%	23%	8%	7%	12%	14%	9%
Somewhere it is easy to visit with children	6%	7%	7%	7%	7%	11%	2%	12%	7%	6%	5%	6%	2%	8%	6%	8%	6%	12%	14%	8%

QR6: (Visitors) When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain? **(Considerers)** Which of the following would be the most important motivators for you to visit Britain on holiday in the future? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

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), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

#3 SUMMARY



What are the key information sources when deciding on a holiday destination?

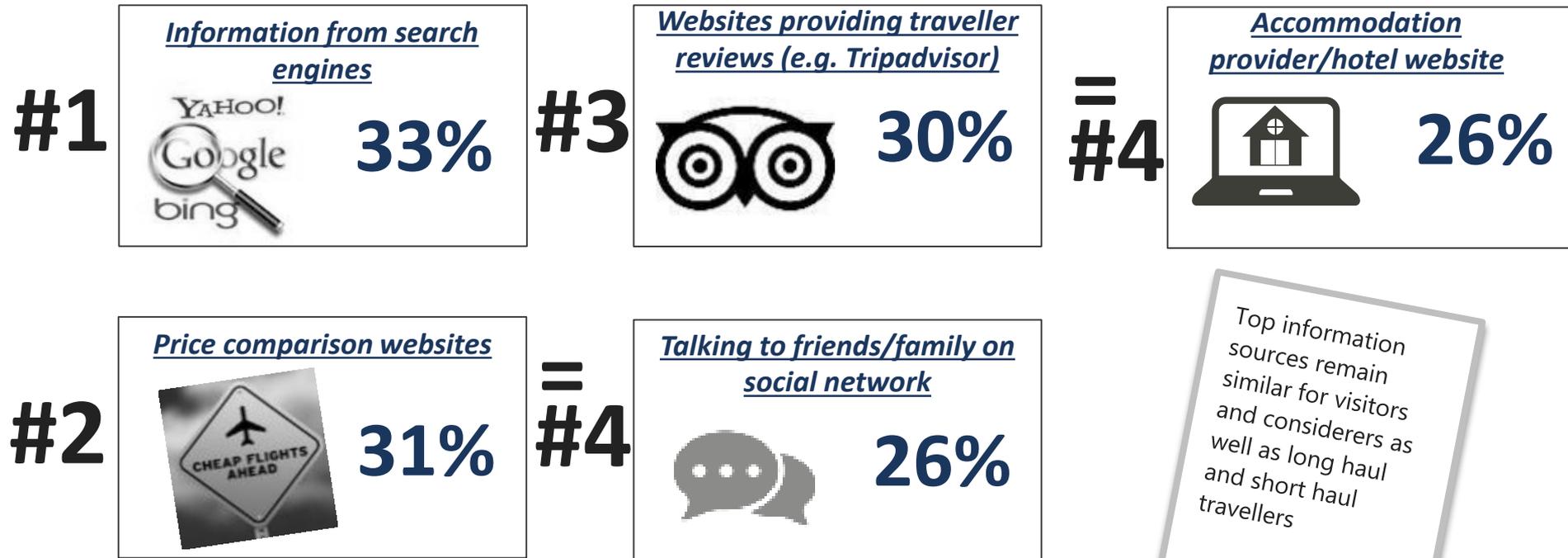
- **Search engines, price comparison websites and word of mouth** (traveller reviews, conversations on social media) are **broadly the key online information sources** for travellers.
- But **travel agents/tour operator websites and accommodation provider websites are more influential for long haul markets**, whereas almost **a third of travellers from short haul markets are not influenced by any listed sources**.
- **Differences by markets –**
 - Travel blogs are important for Brazil, India, Russia, South Korea, Spain & Italy
 - Price comparison websites are more important in Canada, NZ and Gulf
- **Word of mouth is the key offline information source** across markets (not as strong in Japan). **Travel guide books, agents and travel programmes on TV are the other key influencers** across markets; however they are **not as strong within short haul markets** (35% travellers within short haul are not influenced by any listed offline sources).
- **Differences by markets –**
 - Travel guide books are more popular in Advanced Asia and US, China and Brazil
 - Travel programmes on TV are more influential in Brazil, China, Russia & South Korea
 - UAE travellers are also more influenced by price advertisements
 - Nordics and Netherlands are most likely to not go to any information source

Search engines, price comparison websites, traveller reviews and social media conversations are the key online information sources for travellers when deciding on a holiday destination

Base: Visitors & Considerers

Q: Thinking about your holiday to Britain/ the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?

Top online information sources



Top information sources remain similar for visitors and considerers as well as long haul and short haul travellers

Note: Market level data in appendix

QR2 (Visitors): Thinking about your holiday to Britain, which of the following online information sources influenced your choice of destination? (Considerers): Thinking about the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?

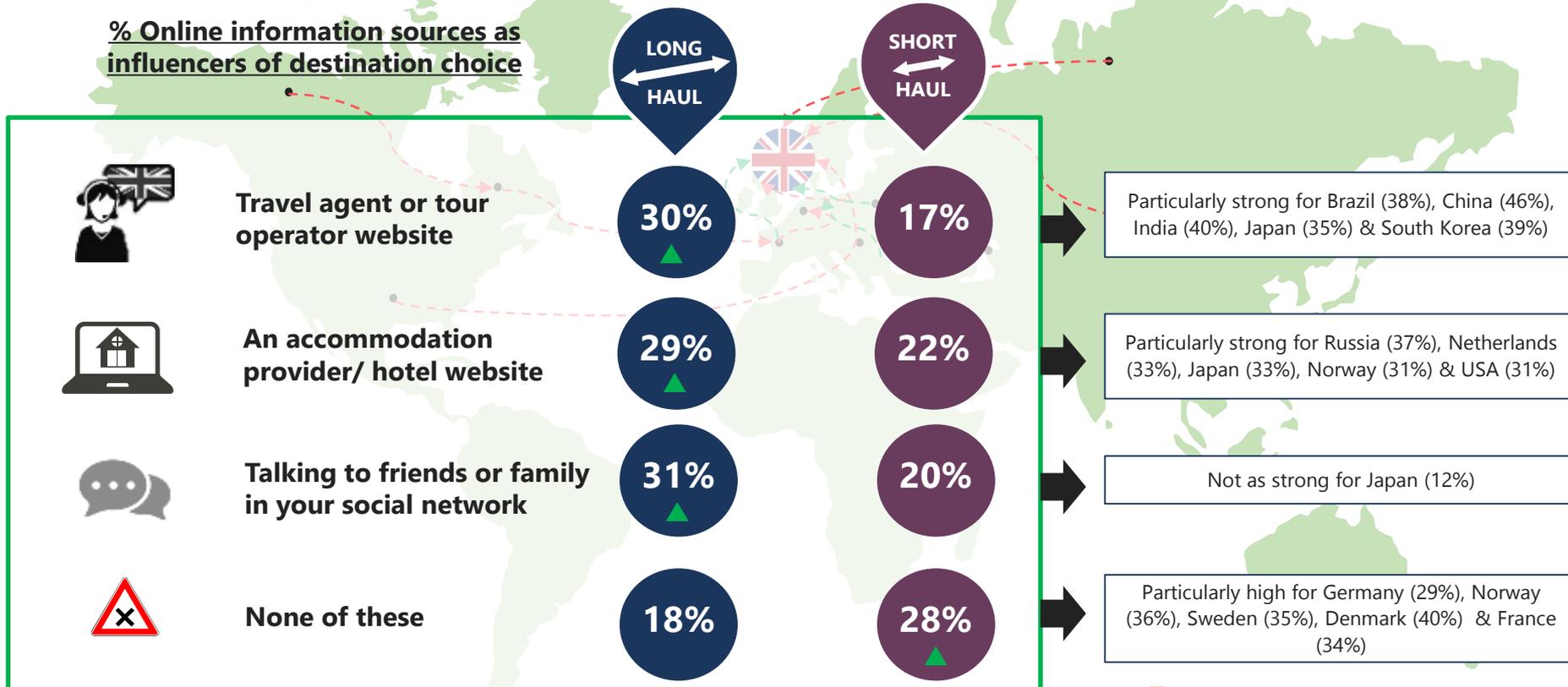
Base: All participants (11,400)

When looking at key sources by broad markets – travel operator / accommodation websites and social media are more important for long haul travellers, whereas almost a third of short haul travellers are not influenced by any of the listed online sources. (However, there are differences by individual markets).

Base: Visitors & Considerers

Q: Thinking about your holiday to Britain/ the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?

% Online information sources as influencers of destination choice



QR2 (Visitors): Thinking about your holiday to Britain, which of the following online information sources influenced your choice of destination? (Considerers): Thinking about the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?

Base: All participants (11,400), Long Haul (3300), Short Haul (4800)

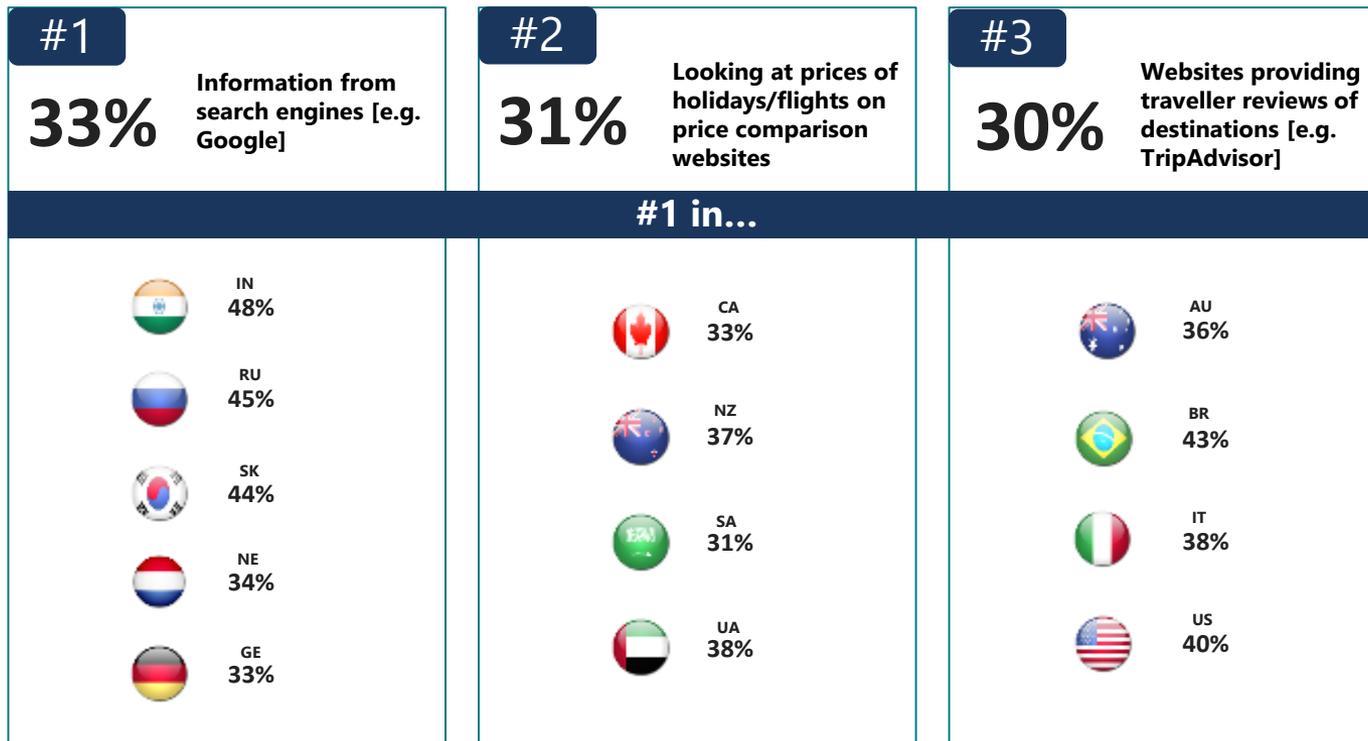
Note: Market level data in appendix

The top online influencers remain the same across countries, however price comparison websites are more important in the Gulf, Canada & NZ. Traveller reviews are more important in AU, Brazil, Italy and the US. Travel blogs also emerge as an important influencer in Brazil, India, Russia, South Korea, Spain & Italy.

Base: Visitors & Considerers

Which online sources influenced people the most?

Top online sources



QR2: (Visitors) Thinking about your holiday to Britain, which of the following online information sources influenced your choice of destination? (Considerers) Thinking about the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?

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), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

Note: Market level data in appendix

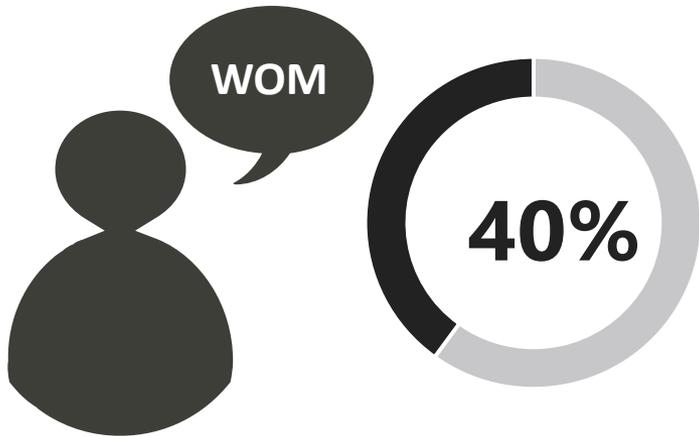
Looking at offline information sources, word of mouth is the most influential when travellers are finalising a holiday destination – similar for visitors/considerers and long haul/short haul travellers.

Base: Visitors & Considerers

Q: Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination?

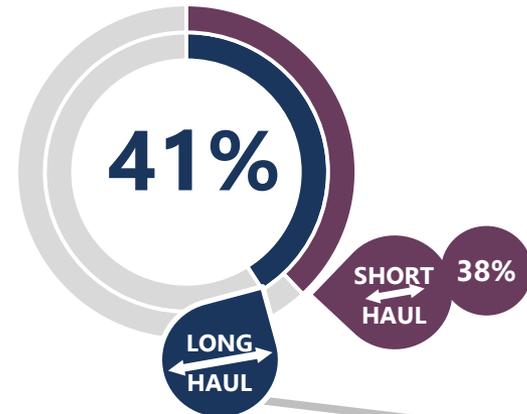
% Offline information sources as influencers

#1



Driven by 18-34yo **44%**
sig ▲ vs 35+yo (**38%**)

Note: Market level data in appendix



The same pattern is seen for both Visitors & Considerers

QR3 (Visitors): Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination? (Considerers): Thinking about the last holiday you took to a foreign country, which of the following other information sources influenced your choice of destination?

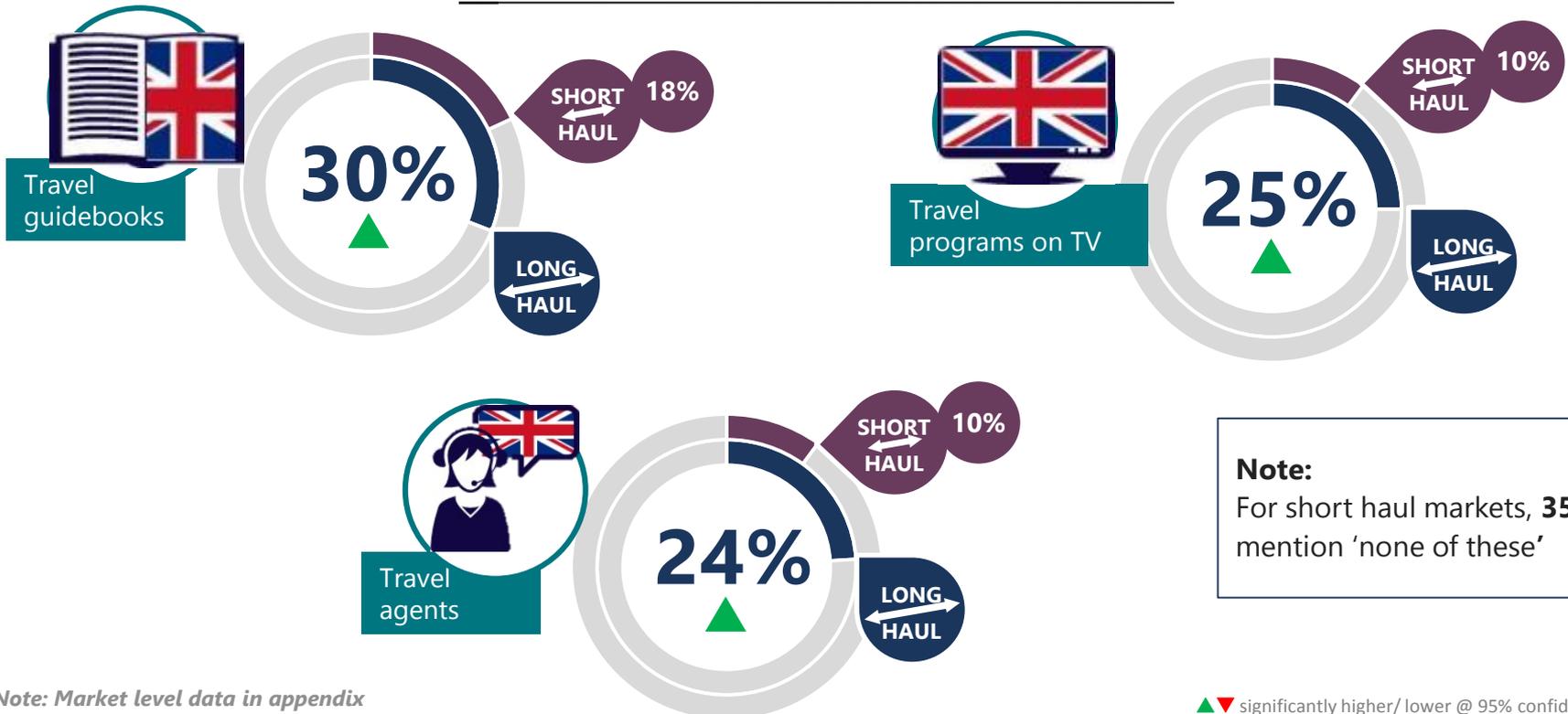
Base: All participants (11,400), Long Haul total (6600), Short Haul Total (4800), 18-34 yrs. (4257), 35+ yrs (7143)

Whilst travel guidebooks, travel agents and TV travel programmes are the other key information sources, they are a stronger influence within long haul. A third of short haul travellers claim not to refer to any of the listed information sources

Base: Visitors & Considerers

Q: Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination?

% Offline information sources as influencers



Note:
For short haul markets, 35% mention 'none of these'

Note: Market level data in appendix

▲ ▼ significantly higher/ lower @ 95% confidence level

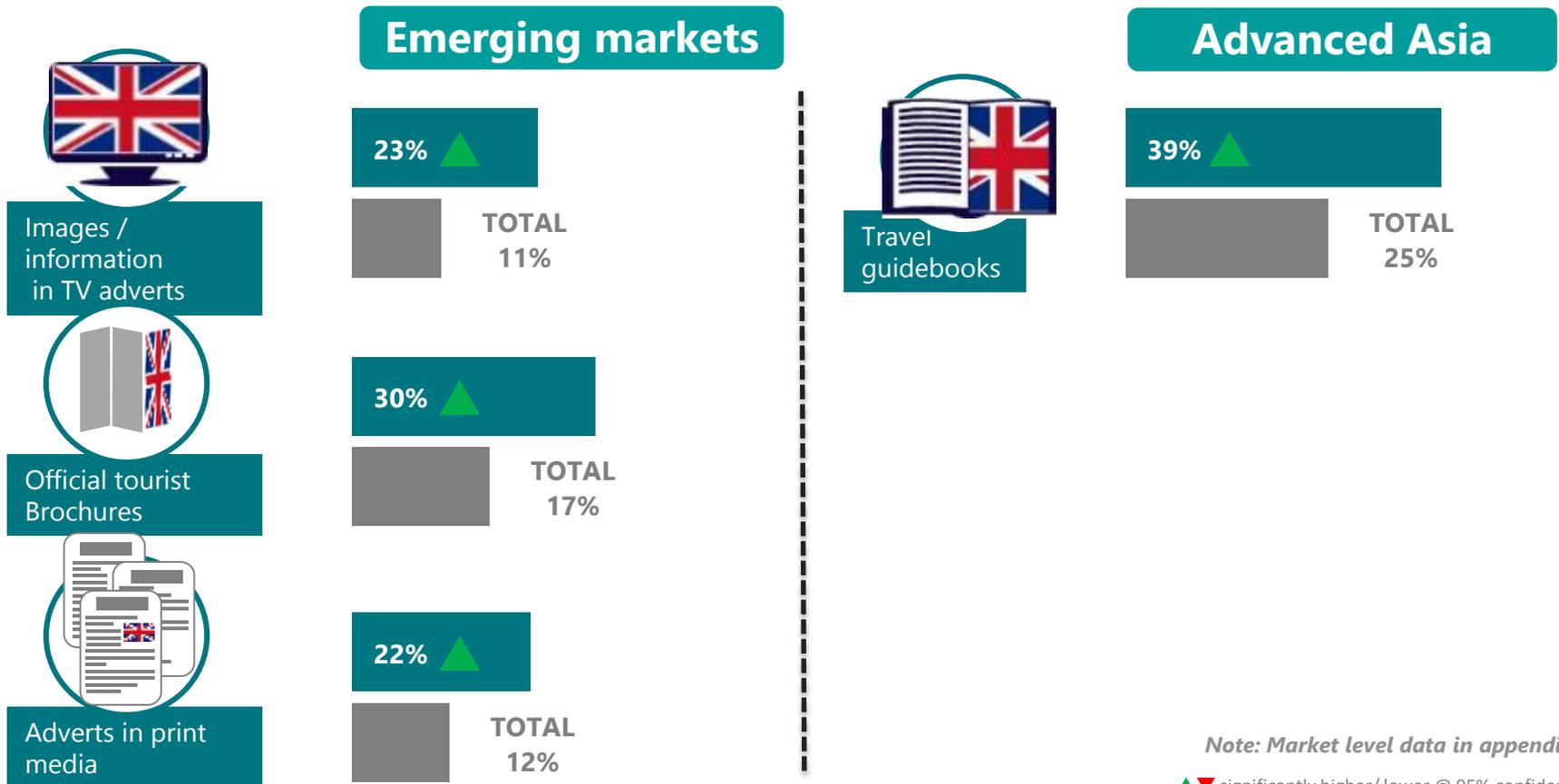
QR3 (Visitors): Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination? (Considerers): Thinking about the last holiday you took to a foreign country, which of the following other information sources influenced your choice of destination?

Base: All participants (11,400), Long Haul total (6600), Short Haul Total (4800),

Looking at market clusters, emerging markets are also more influenced by TV, prints ads and official tourist brochures, whereas those from Advanced Asia are more influenced by travel guidebooks.

Base: Visitors & Considerers

Q: Thinking about your holiday to Britain/ the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?



Note: Market level data in appendix

▲ ▼ significantly higher/ lower @ 95% confidence level

QR3 (Visitors): Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination? / (Considerers) Thinking about the last holiday you took to a foreign country, which of the following other information sources influenced your choice of destination?

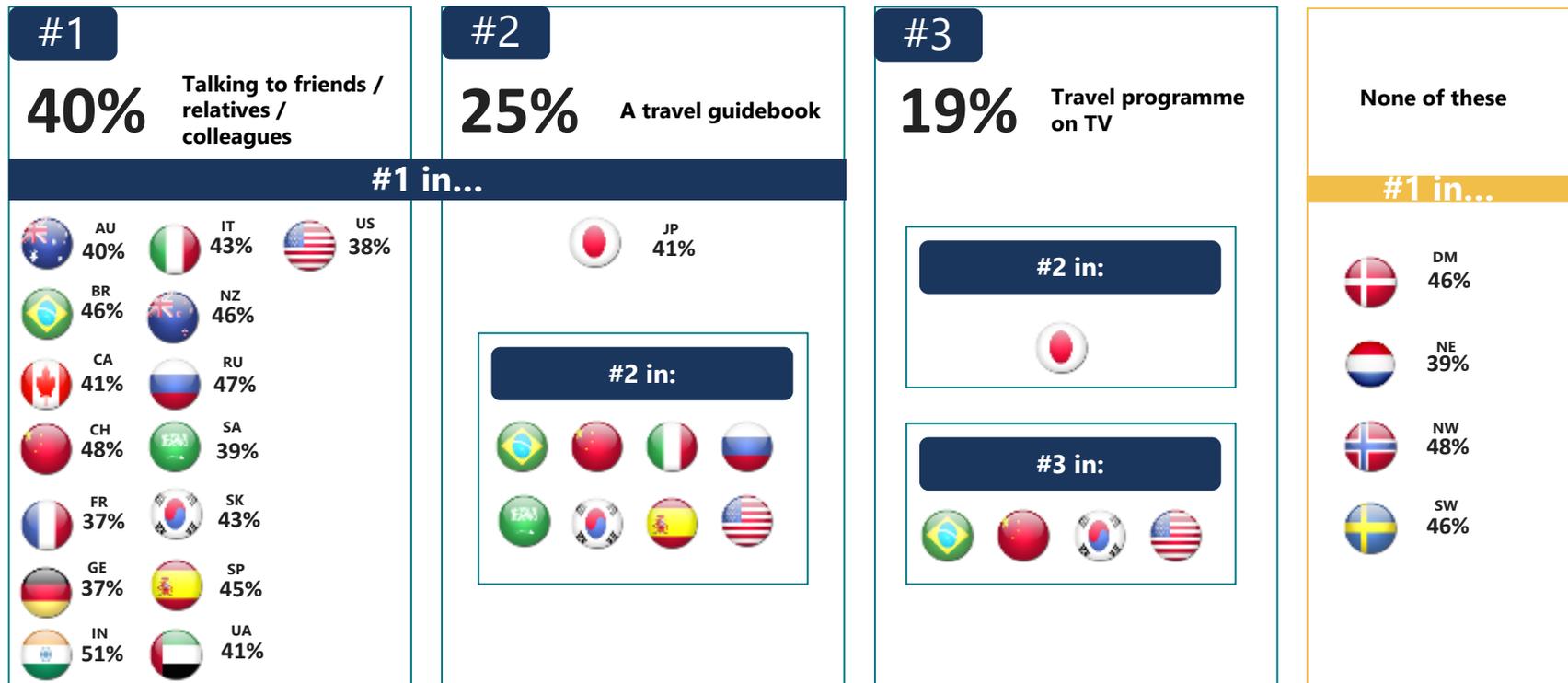
Base: All participants (11400) Advanced Asia (1200), Emerging markets (2400)

Discussions with friends or relatives is the most influential offline source, ranking top in most markets. Some northern European countries, including Sweden and Norway, a high proportion claim not to have used any offline sources.

Base: Visitors & Considerers

Which other sources influenced people the most?

Top offline sources – by rank per market



QR3: (Visitors) Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination? (Considerers) Thinking about the last holiday you took to a foreign country, which of the following other information sources influenced your choice of destination?

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), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

#4 SUMMARY



When did people start to plan their holiday to Britain?

- The journey to book a holiday typically lasts 3+ months.**

Around half of respondents start to think about their trip 6+ months in advance, and decide on their destination within the next 3 months.

Around one third book their trip 3-6 months in advance, and nearly a third book their trip 1-2 months in advance.
- In general, long haul visitors tend to start all stages earlier,** a quarter look at prices 6+ months in advance and are more likely to also book that far in advance. But there are **differences within long haul markets:**

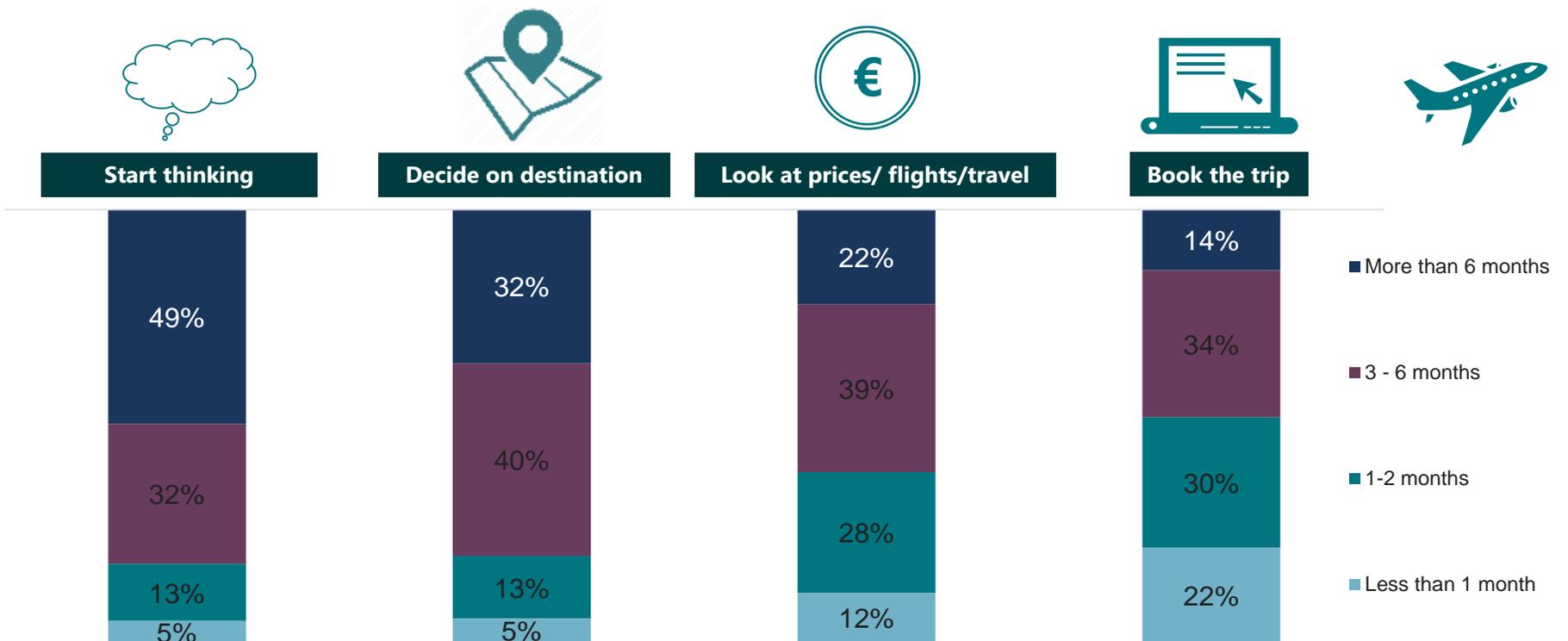
 - China are most likely to look at prices and book only a few weeks in advance
 - Many in Gulf, Russia and India are also likely to book their holiday only a few weeks in advance
 - Australia and New Zealand have the longest booking lead time, followed by visitors from the Americas.
- Short haul visitors are more likely to **start thinking about their trip and looking at prices 3-6 months in advance.** There are **differences by short haul markets:**

 - Most visitors from Germany start thinking about their trip 6+ months in advance
 - More than half from Spain, Netherlands and Sweden book 1-2 months in advance or later

The journey to book a holiday to Britain typically lasts 3+ months. Half of people started thinking about their trip 6+ months in advance and decide on a destination within the next 3 months. Looking at prices typically also comes alongside deciding on a destination (price is likely to be a factor when narrowing down on choices), though some do it a month later. Booking a trip comes about 2-3 months before the trip

Base: Visitors

When do people start looking to come to Britain?



Note: Market level data in appendix

Long haul markets typically start thinking and planning their trip to Britain earlier than short haul visitors – with a few notable exceptions. Unlike short haul markets, long haul travellers are most likely to start thinking about their trip 6+ months in advance.

Start thinking



When do people start looking to come to Britain?

Base: Visitors

LONG HAUL

SHORT HAUL

	AUS	USA	CAN	NZ	BRA	RUS	IND	CHI	JAP	KOR	SAU	UAE	DEN	SWE	NOR	ITA	GER	FRA	SPA	NET
6+ months before trip	76%	60%	59%	70%	58%	57%	48%	42%	48%	48%	37%	44%	38%	38%	41%	36%	57%	42%	40%	32%
3-6 months before	14%	21%	29%	20%	28%	26%	34%	33%	36%	31%	35%	30%	34%	39%	36%	40%	28%	29%	34%	36%
1-2 months before	5%	10%	6%	5%	9%	11%	12%	18%	11%	15%	15%	14%	18%	14%	11%	16%	9%	18%	18%	18%
Less than 1 month before	3%	7%	5%	3%	4%	4%	4%	6%	1%	4%	6%	10%	6%	7%	7%	7%	5%	8%	7%	8%

QR5: Thinking about your holiday to Britain, how far in advance did you...?

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)

However, not all markets among long haul behave the same. Visitors from Gulf are most likely to book their trip just a few weeks in advance, while Advanced Asia and Emerging Markets book their holiday 1-2 months in advance

Base: Visitors



Book the trip

When do people book their trip Britain?



QR5: Thinking about your holiday to Britain, how far in advance did you...?
 Base: Visitors (5700) Gulf (300), Advanced Asia (600), Emerging Markets (1200)

SUMMARISING HOLIDAY RESEARCH & PLANNING

- **Researching and booking** of a holiday is **more likely to be done by the individual** whereas **shortlisting and finalising destinations** is more likely **to be a joint responsibility**. However, this trend changes by markets: long haul markets are more likely to make the final choice of destination on their own, whereas short haul markets are more likely to consult their travel partner or spouse.
- The **key motivator for travellers to decide on a holiday destination**/Britain is **cultural attractions**. Other top motivators for visiting a destination are the **countryside, good deals, variety of places to visit** and the fact that it was **somewhere new** – all these were predominantly higher for considerers than visitors.
- The most **popular information sources used when researching** a holiday **are search engines, price comparison sites and word of mouth**. Other information sources such as travel guidebooks, programmes and agents were also more influential for long haul markets.
- Around half of visitors **start to think about a holiday 6+ months** in advance but a similar proportion book their trip less than three months in advance. In general, **long haul visitors tend to start all stages earlier**, a quarter look at prices 6+ months in advance and are more likely to also book that far in advance, although there are some exceptions with planning and booking lead times varying greatly by market.



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



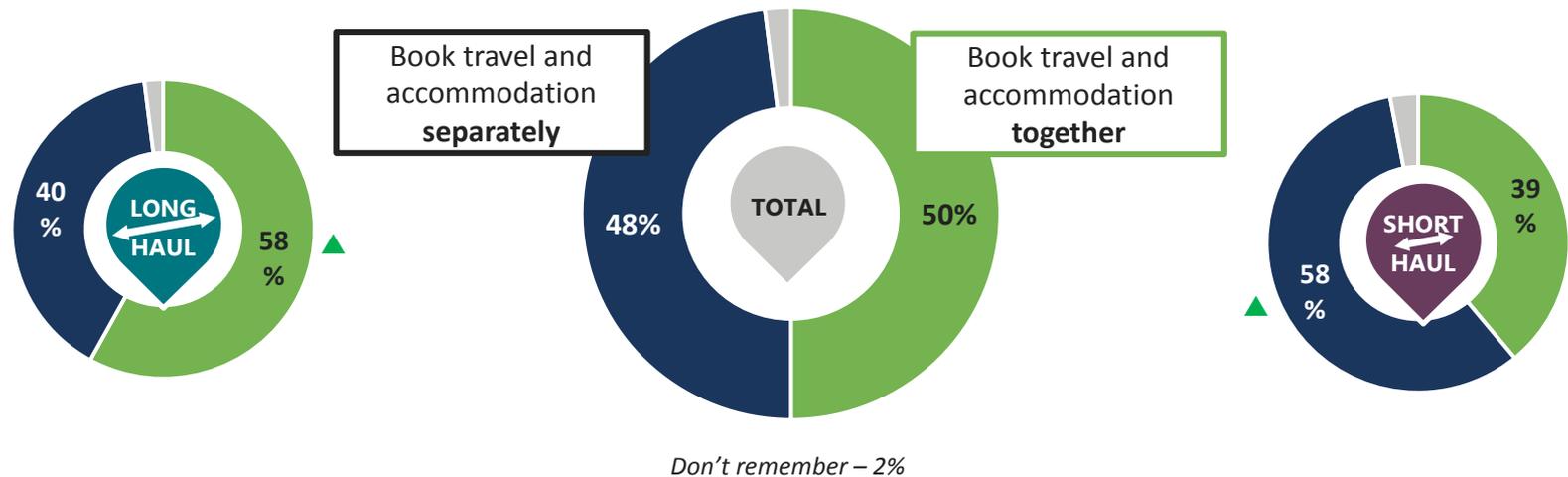
How do people do their bookings?

- 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?



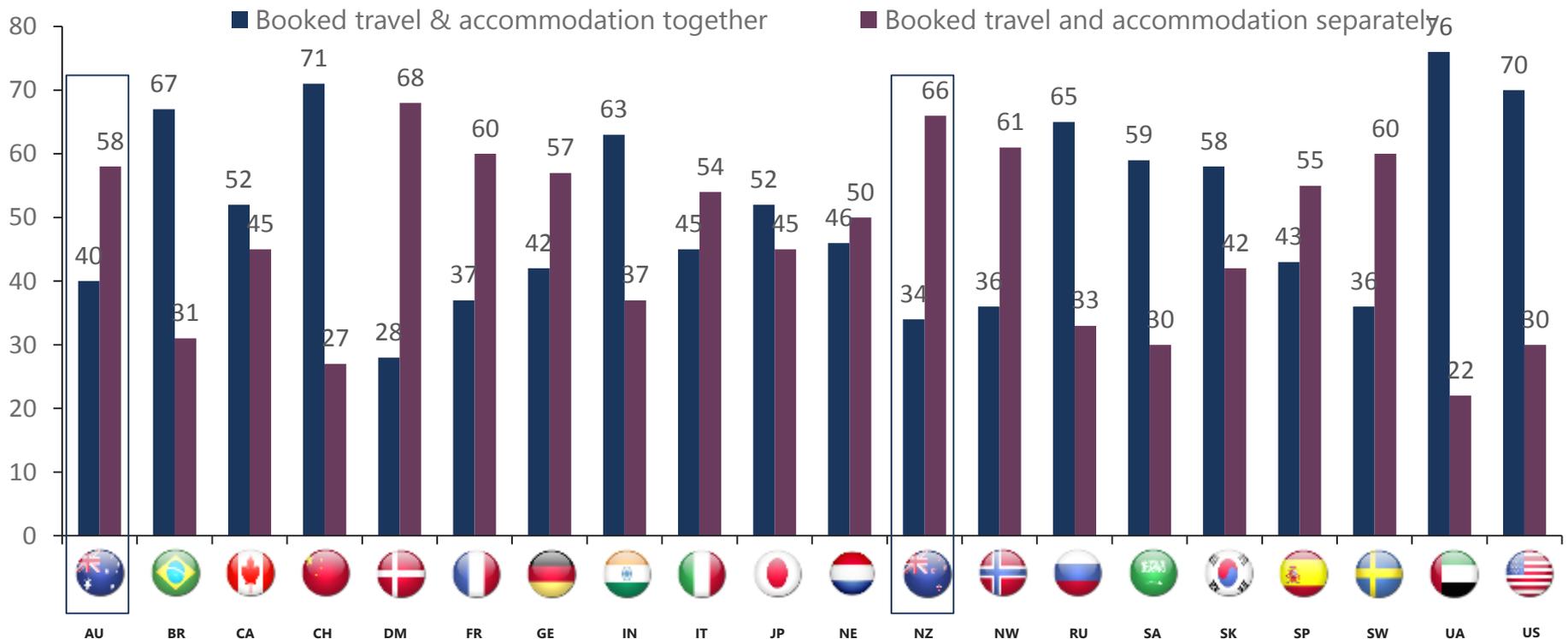
QB1: Which of the following best describes how you booked your holiday to Britain? If someone else made the booking, how did they book the holiday?
 Base: Visitors (5700), Long haul(3300), Short haul (2400),

▲ ▼ 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?

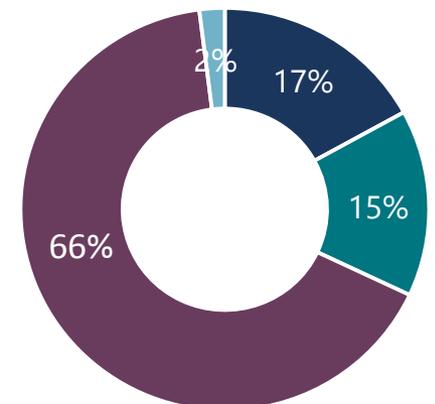
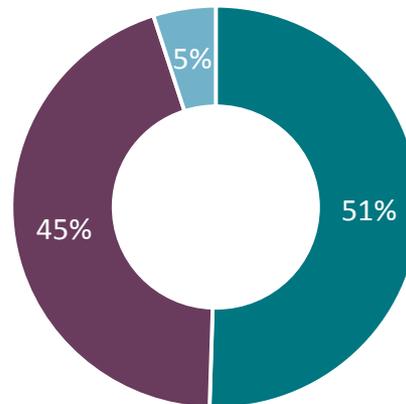
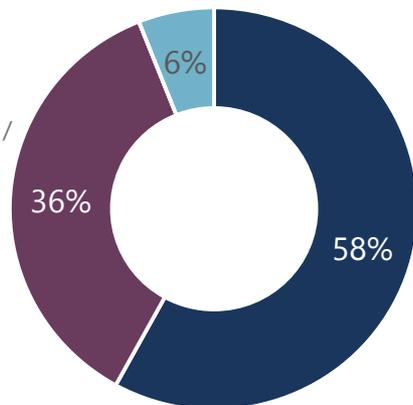
% Method of booking travel, accommodation & holidays

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

Travel																				
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
Accommodation																				
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
Holiday (Travel & Accommodation)																				
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



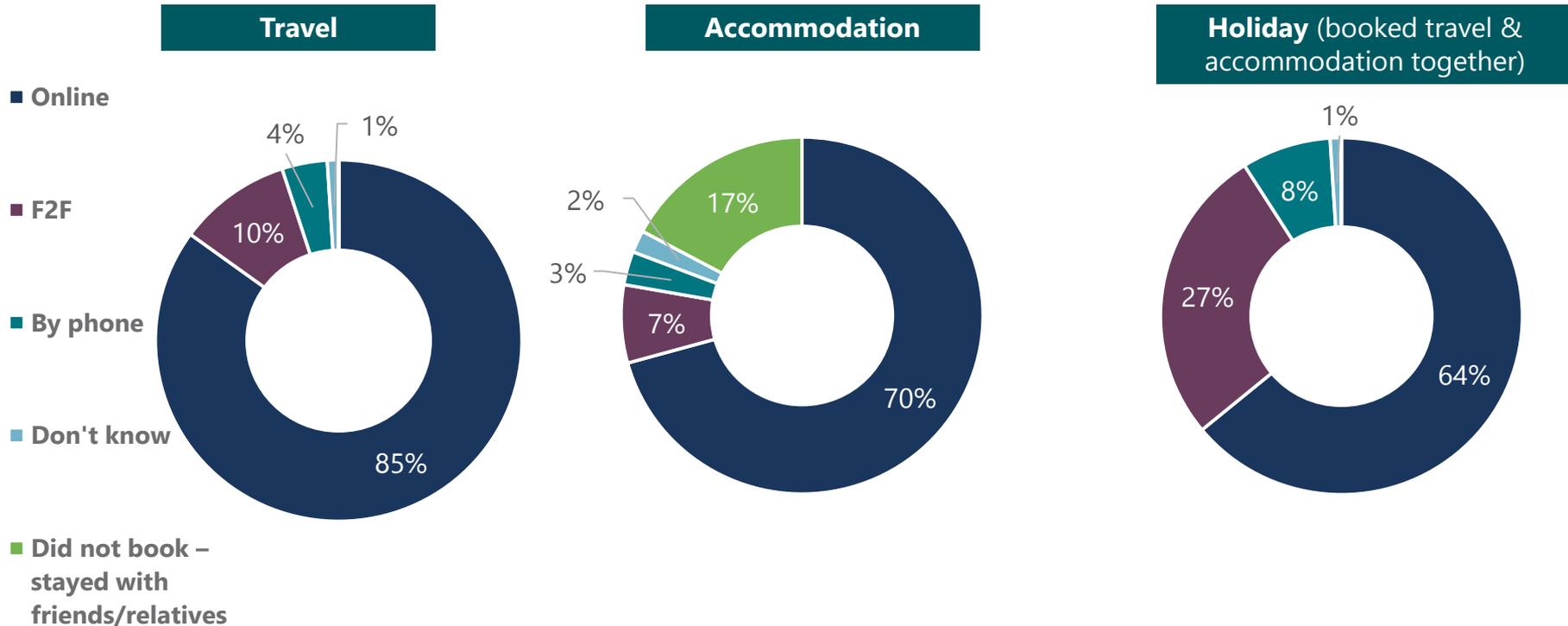
What modes & devices are used by travellers to make their booking?

- **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
Travel																			
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
Accommodation																			
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
Holiday																			
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?

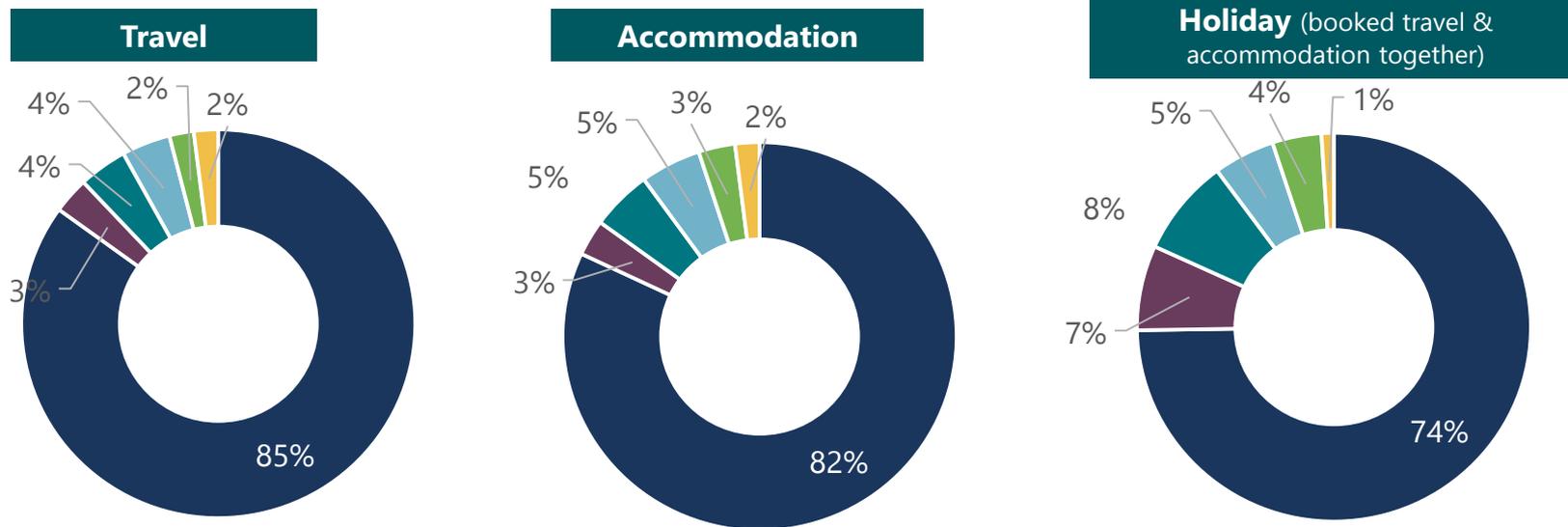
Base: Visitors: Booked separately-travel & accommodation (2569)/ Booked together- holiday (2703), Australia (173)/(116), Brazil (89)/(202), Canada (133)/(155), China (81)/(212), India (111)/(188), Japan (135)/(155), New Zealand (197)/(100), Russia (98)/(194), Saudi Arabia (53)/(104), South Korea (126)/(174), 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

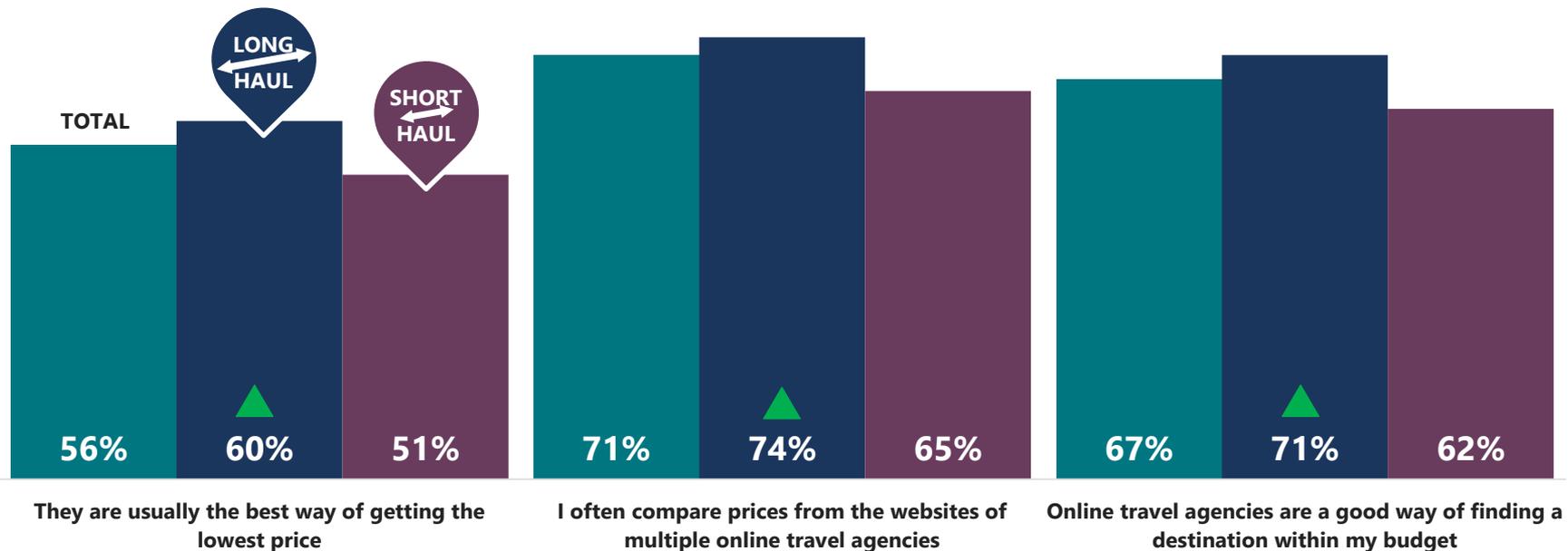
Why do people use online travel agents/ comparison sites & what channels did they use for booking?

- 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)

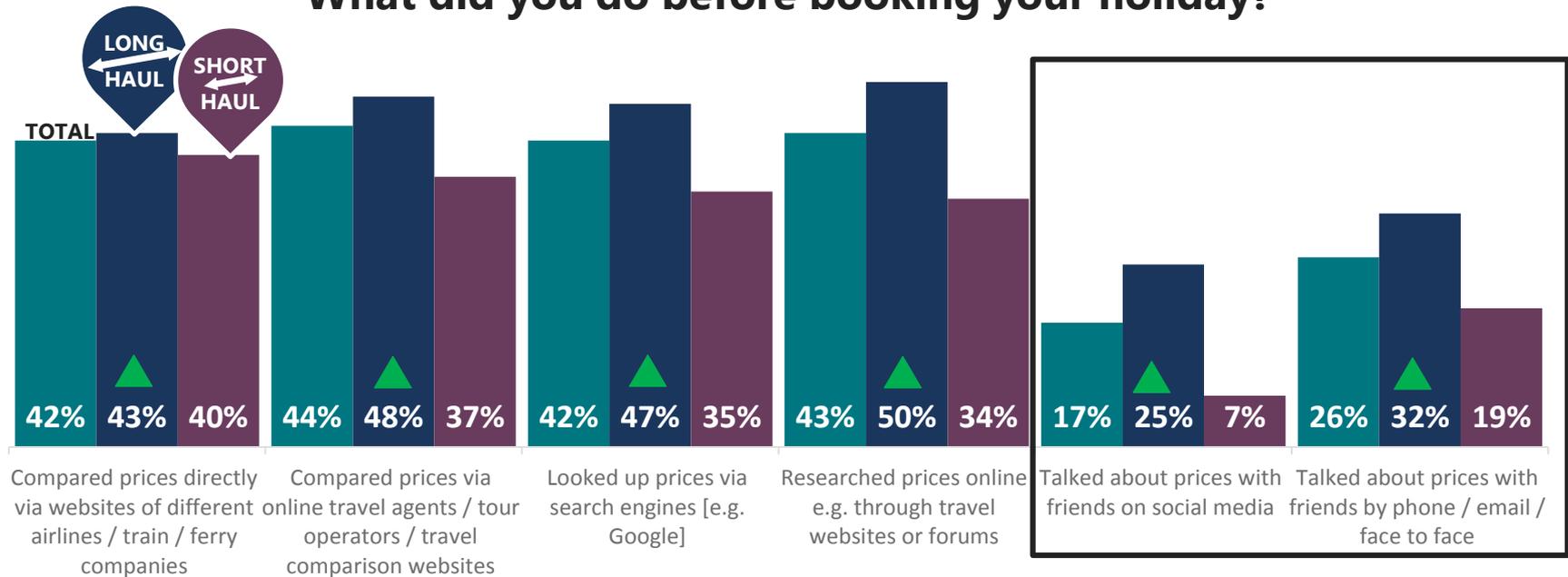
▲▼ significantly higher/ lower SH @ 95% confidence level

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)

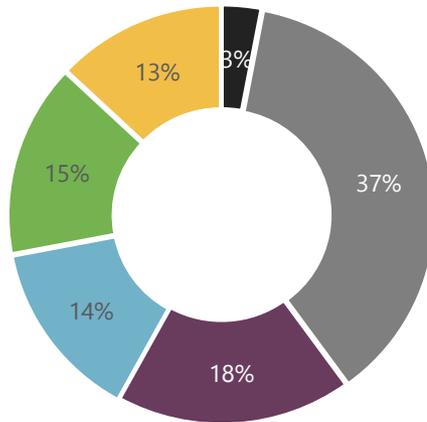
Online-only operator sites are most popular for booking travel, accommodation or holiday (much more popular for booking accommodation). Considerable proportion of travellers also use traditional tour operators to book their holidays

How have people booked?

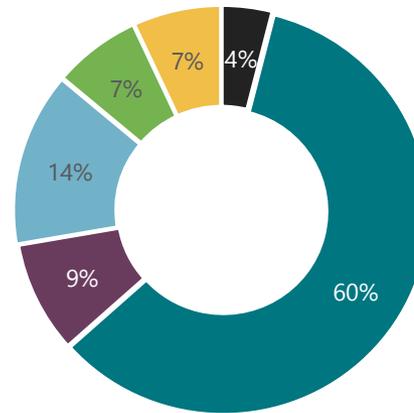
Base: Visitors & Considerers

- 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

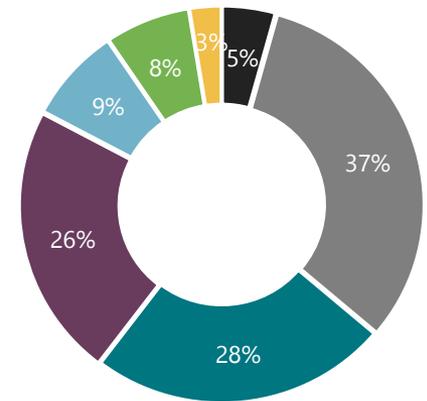
Travel Total



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

Scores higher than global average highlighted/market

Base: Visitors & Considerers Booked travel or holiday

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
Before visit	27	43	27	30	34	32	34	27	31	31	34
During my visit	32	31	57	38	12	19	29	15	31	28	46
Did not buy/ expect to buy	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)

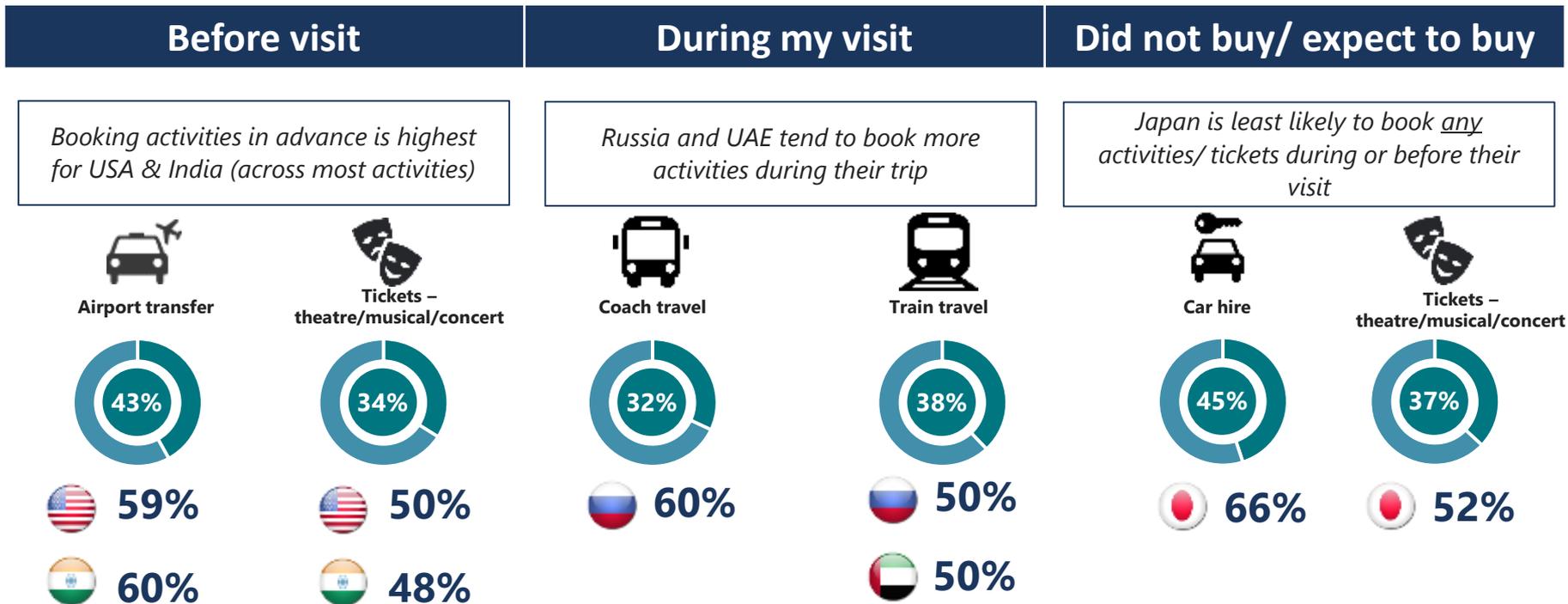
■ significantly higher/ lower vs Visitors @ 95% confidence level

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)

Note: Market level data in appendix

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.

SHORT HAUL

Base: Visitors & Considerers

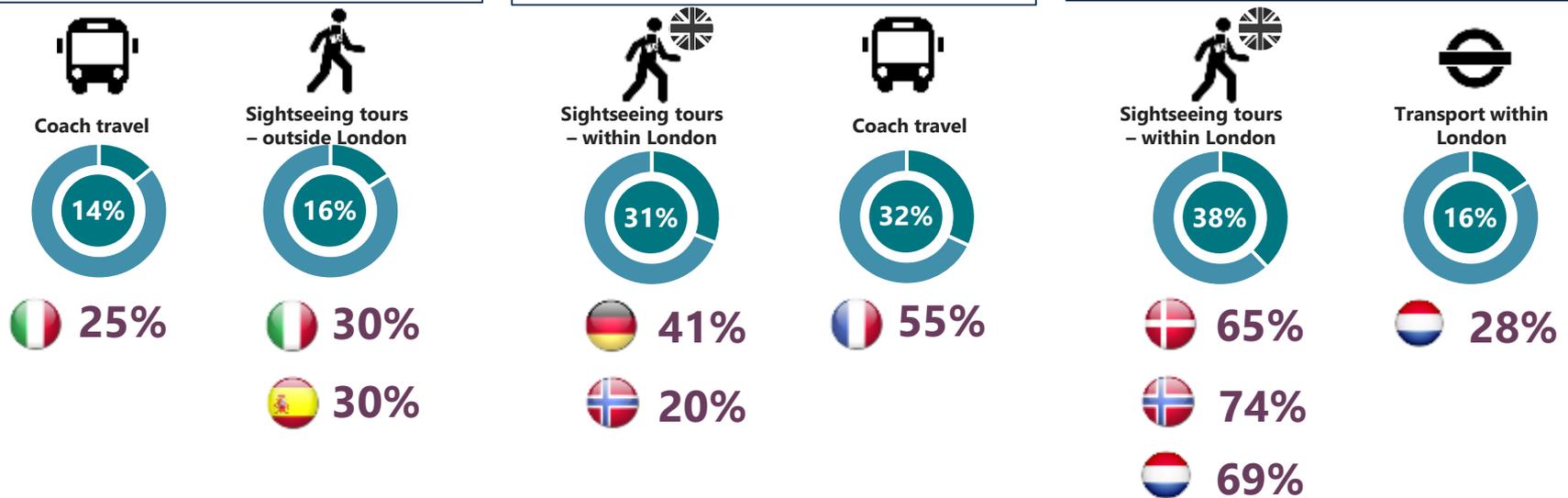
What do people buy or expect to buy on their holiday?

Before visit	During my visit	Did not buy/ expect to buy
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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	36%
Ticket to theatre/musical/concert	22	21	19	22	19	13	21	14	30%
Tickets /passes for other tourist attractions	16	16	14	26	24	15	24	11	31%
Flights within the UK	3	11	2	22	12	10	14	10	28%
Guided sightseeing tours in London	6	6	3	21	17	13	21	8	28%
Guided sightseeing tours outside London	5	8	5	20	16	10	19	8	28%
Train Travel (within the UK), not including underground / Oyster cards	12	10	14	20	18	14	17	12	27%
Car hire	6	10	10	17	23	13	17	10	27%
Transport within London e.g. underground tickets, Oyster cards	16	10	14	24	22	12	16	14	26%
Coach travel/Long distance bus in the UK	6	7	6	20	13	8	14	10	24%
Ticket to sports events	6	14	12	16	9	10	13	13	24%

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.

% 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**.

Appendix



Travellers from Brazil, India, UAE and China are more likely to take short breaks (1-3 nights) than other markets. There are also more business trips amongst travellers from Gulf, India and China.

Base: Visitors & Considerers

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

% travellers who have taken trips of each kind

													
Holiday 1-3 nights		46	48	54	40	66	52	68	74	44	60	58	73
1-2 trips		36	30	37	30	49	36	52	50	32	44	43	50
3-5 trips		10	18	17	10	17	16	16	24	12	16	15	23
Holiday 4+ nights		87	72	77	87	75	79	75	78	75	75	81	82
1-2 trips		60	43	46	56	48	49	51	50	44	50	55	42
3-5 trips		27	29	31	31	27	30	24	28	31	25	26	40
Business trip		20	32	25	22	41	38	54	50	21	34	50	42
1-2 trips		14	18	19	14	25	26	34	32	13	22	29	26
3-5 trips		6	14	6	8	16	12	20	18	8	12	21	16

QC3: Total: Just thinking about the past 3 years, how many trips of each type have you taken? If you are not sure then please choose the option that you think is the closest.

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)

A quarter of those from Italy took a business trip in the last three years, and almost three quarters of Italians took a short break in the last three years. Longer breaks (4+ nights) are most common amongst those from Germany and Spain.

Base: Visitors & Considerers

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

% travellers who have taken trips of each kind

									Avg all global markets
 Holiday 1-3 nights	66	63	61	72	65	63	66	63	
1-2 trips	40	44	33	49	44	48	41	39	41%
3-5 trips	26	19	28	23	21	15	25	24	19%
Holiday 4+ nights	71	76	66	79	80	76	80	78	
1-2 trips	37	46	33	56	48	48	52	39	48%
3-5 trips	34	30	33	23	32	28	28	39	29%
Business trip	15	14	19	23	15	12	21	16	
1-2 trips	10	10	14	16	11	9	14	11	18%
3-5 trips	5	4	5	7	4	3	7	5	10%

QC3: Just thinking about the past 3 years, how many trips of each type have you taken? If you are not sure then please choose the option that you think is the closest.

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

Most visitors took a trip to Britain that lasted between 4-7 nights. A quarter from Japan, and a third of visitors from South Korean visited Britain for 1-3 nights whereas Australia & New Zealand are more likely to have longer trips lasting 15+ nights.

Q: How long was your holiday to Britain?

Base: Visitors

Length of visit to Britain



1-3 nights	26%	32%	13%	13%	11%	15%	14%	8%	18%	13%	11%	21%	
4-7 nights	54%	46%	51%	44%	18%	49%	44%	30%	50%	48%	55%	57%	
8-14 nights	12%	17%	23%	28%	22%	27%	28%	26%	23%	23%	26%	19%	
15+ nights	7%	6%	8%	12%	47%	9%	14%	35%	8%	15%	7%	3%	

The majority of visitors from short haul markets visited Britain for fewer than 7 nights. France, Netherlands and Nordics have also taken more shorter break whereas just under a quarter of visitors from Germany visited for more than 7 nights.

Q: How long was your holiday to Britain?

Base: Visitors

Length of visit to Britain

									Avg all global markets
 SHORT HAUL									
 1-3 nights	35%	29%	37%	20%	18%	40%	17%	38%	22%
 4-7 nights	51%	63%	53%	59%	51%	45%	61%	41%	48%
 8-14 nights	11%	6%	9%	16%	22%	8%	18%	17%	19%
 15+ nights	2%	1%	1%	5%	9%	6%	3%	4%	10%

Most travellers from long haul markets have visited Britain with their spouse, however a quarter from Japan and Australia travelled by themselves. A third of those from the US and India travelled to Britain with their children.

Base: Visitors

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



% Travel companion when visited Britain

On your own	23	19	20	18	16	15	14	14	22	14	21	18
With spouse/partner	58	66	54	63	63	60	68	72	48	58	45	48
With children aged under 16	17	31	18	14	24	23	33	16	8	17	22	24
With other adult family members	16	12	12	11	12	8	21	7	13	14	22	25
With friends	7	10	14	7	10	11	10	13	17	19	10	15

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

Base: Visitors (5700), Parents children under 18 (2443), 35-54s (3254), 18-24s (1030)

Whilst a spouse or partner is the most likely travel companion, short haul travellers are also more likely to visit Britain with other family members or friends.

Base: Visitors

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

SHORT HAUL

% Travel companion when visited Britain

									Avg all global markets
On your own	12	7	7	7	14	13	5	11	14%
With spouse/partner	50	43	43	62	62	59	56	52	57%
With children aged under 16	14	12	10	14	10	19	17	10	17%
With other adult family members	24	26	26	14	12	14	22	23	16%
With friends	21	28	35	23	20	19	22	16	17%

For long haul markets, all planning stages tend to be done more by the individual. Russia, New Zealand and UAE are more likely than other markets to research, shortlist and finalise destinations in consultation with someone else.

Q: Who is most likely to do the following when it comes to your holidays?

Base: Visitors & Considerers



% travellers who would do the following in terms of holidays

	Australia	Brazil	Canada	China	India	Japan	New Zealand	Russia	Saudi Arabia	South Korea	UAE	USA
Research possible destinations												
I do	57	70	61	54	59	64	51	40	48	42	46	65
We both get involved	34	19	30	22	22	22	41	41	29	30	31	23
Shortlist options												
I do	48	49	47	42	38	56	37	29	33	37	22	47
We both get involved	43	28	40	27	30	26	52	47	32	35	40	31
Make final choice												
I do	46	60	42	54	50	64	34	40	41	47	31	53
We both get involved	47	26	46	26	30	22	58	44	33	30	42	36
Make the booking												
I do	61	68	67	60	59	73	57	56	45	53	40	62
We both get involved	28	16	21	16	18	13	30	29	21	23	22	19

QR1: Who is most likely to do the following when it comes to your holidays?

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)

▲ ▼ significantly higher/ lower @ 95% confidence level

Short haul travellers tend to involve travel partners when shortlisting options and making the final choice, while booking is done by the individual.

Q: Who is most likely to do the following when it comes to your holidays?

Base: Visitors & Considerers



% travellers who would do the following in terms of holidays

									Avg all global markets
Research possible destinations									
I do	42	43	40	50	48	52	43	44	51%
We both get involved	50	47	47	30	41	32	46	40	34%
Shortlist options									
I do	30	26	19	39	36	38	27	37	37%
We both get involved	60	61	63	38	50	44	59	47	43%
Make final choice									
I do	17	22	22	36	33	33	28	30	39%
We both get involved	76	70	67	46	57	52	63	59	47%
Make the booking									
I do	53	55	57	57	60	56	58	49	58%
We both get involved	35	30	29	25	27	28	30	34	25%

▲▼ significantly higher/ lower @ 95% confidence level

QR1: Who is most likely to do the following when it comes to your holidays?

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

Most long haul visitors started thinking about their trip to Britain more than 6 months in advance (especially New Zealand and Australia). China, Japan, India and UAE are more likely to do so 3-6 months in advance. Most short haul visitors started thinking about their holiday either 6+ months or 3-6 months in advance (exception of Germany where 57% visitors started thinking 6+ months).

Base: Visitors



% starting to think about trip at each stage

6+ months before trip	76	60	59	70	58	57	48	42	48	48	37	44
3-6 months before	14	21	29	20	28	26	34	33	36	31	35	30
1-2 months before	5	10	6	5	9	11	12	18	11	15	15	14
A few weeks before	2	5	4	3	2	3	3	4	1	4	5	6
1 week before	1	2	1	0	2	1	1	2	0	0	1	4



									Avg all global markets
6+ months before trip	38	38	41	36	57	42	40	32	49%
3-6 months before	34	39	36	40	28	29	34	36	31%
1-2 months before	18	14	11	16	9	18	18	18	13%
A few weeks before	4	6	5	6	4	7	6	6	4%
1 week before	2	1	2	1	1	1	1	2	1%

QR5: Thinking about your holiday to Britain, how far in advance did you start thinking about the trip?

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)

India and South Korea are most likely to look at prices/ options 1-2 months in advance, and 25% in China taking a look only a few weeks before. Among short haul, most look 3-6 months in advance, though a third in Norway and Sweden do this 1-2 months before



% looking at options/prices at each stage

Base: Visitors

6+ months before trip	50	28	28	50	36	18	12	10	19	12	9	11
3-6 months before	31	32	39	30	35	32	30	24	44	32	28	23
1-2 months before	10	22	23	13	21	34	40	35	31	40	35	36
A few weeks before	6	10	7	4	6	13	13	25	3	10	15	18
1 week before	2	4	1	1	2	2	2	4	0	1	5	7



									Avg all global markets
6+ months before trip	21	14	16	13	24	18	14	9	21%
3-6 months before	40	38	50	46	46	39	43	38	37%
1-2 months before	24	32	19	28	17	25	29	30	27%
A few weeks before	3	10	8	9	9	13	11	12	10%
1 week before	3	2	3	1	2	1	1	4	2%

QR5: Thinking about your holiday to Britain, how far in advance did you start thinking about the trip?

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)

Most long haul markets decide on the final destination 3-6 months in advance, although like researching, NZ and Australia tend to do this earlier. China, South Korea, Russia, India and UAE behave differently, and are likely to decide 1-2 months in advance. Among short haul, most decide 3-6 months before, although a quarter from Sweden and Italy decided 1-2 months in advance.

Base: Visitors



% deciding on the destination at each stage

6+ months before trip	66	37	42	59	41	28	18	18	30	22	15	16
3-6 months before	21	36	37	27	37	40	46	34	45	44	39	46
1-2 months before	7	15	14	8	17	23	27	30	19	26	26	20
A few weeks before	3	6	4	3	2	7	6	13	1	6	10	9
1 week before	1	3	1	0	2	1	1	2	0	0	2	5



6+ months before trip	34	30	35	19	38	34	24	18
3-6 months before	34	35	39	47	40	33	44	42
1-2 months before	20	24	14	24	13	19	22	22
A few weeks before	4	6	5	7	6	9	8	8
1 week before	2	1	2	0	1	1	1	3

Avg all global markets
32%

38%

19%

6%

1%

QR5: Thinking about your holiday to Britain, how far in advance did you start thinking about the trip?

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)

Long haul visitors from Gulf, Russia, India and China are most likely to book their trip just a few weeks in advance, yet over a third of visitors from Australia and New Zealand do this 6+ months in advance. Among short haul markets, Germany tends to book their trip earlier.



% booking the trip at each stage

Base: Visitors

6+ months before trip	35	20	18	38	23	8	10	8	11	10	7	9
3-6 months before	38	31	37	33	37	23	20	13	37	22	22	9
1-2 months before	14	17	24	15	22	34	35	32	37	38	27	20
A few weeks before	6	15	15	9	10	26	25	29	10	19	25	28
1 week before	5	10	4	1	5	6	7	15	2	6	9	10



									Avg all global markets
6+ months before trip	12	6	9	7	15	7	7	7	14%
3-6 months before	40	36	45	40	44	37	30	29	32%
1-2 months before	30	34	27	30	17	29	44	28	28%
A few weeks before	5	15	9	16	15	17	14	20	16%
1 week before	4	4	4	4	4	6	3	6	6%

QR5: Thinking about your holiday to Britain, how far in advance did you start thinking about the trip?

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)

Travel blogs are important for Brazil, India, Russia, Japan, Spain & Italy. Images/videos on social media are important for Gulf markets. UAE travellers also go to official tourist websites whereas online. Price advertisements are an important source for travellers from Saudi Arabia & New Zealand. Nordics and Netherlands are most likely to not use any offline information sources.

Q: Thinking about your holiday to Britain/ the last holiday you took to a foreign country, which of the following information sources influenced your choice of destination?

Base: Visitors & Considerers

Scores adjusted for market comparability (see notes)	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA	TOT
Talking to friends / relatives / colleagues	43%	31%	49%	28%	70%	58%	51%	27%	49%	26%	52%	50%	65%	35%	34%	35%	54%	72%	25%	31%	40%
Information from search engines [e.g. Google]	38%	28%	38%	22%	48%	42%	44%	26%	41%	29%	54%	37%	38%	33%	22%	36%	32%	43%	18%	31%	33%
Looking at prices of holidays/flights on price comparison websites	37%	26%	39%	21%	50%	35%	36%	23%	37%	25%	44%	40%	57%	29%	27%	27%	25%	49%	24%	25%	31%
Websites providing traveller reviews of destinations [e.g. TripAdvisor]	39%	29%	38%	25%	26%	36%	29%	24%	43%	29%	37%	33%	41%	28%	16%	22%	33%	24%	18%	32%	30%
Talking to friends or family in your social network (e.g. via Facebook / Twitter)	29%	24%	31%	25%	38%	27%	27%	25%	23%	13%	27%	37%	30%	24%	27%	22%	31%	42%	23%	24%	26%
An accommodation provider/ hotel website	31%	23%	27%	17%	32%	30%	28%	18%	25%	34%	53%	27%	54%	27%	17%	21%	25%	23%	17%	25%	26%
A travel guidebook	21%	23%	24%	24%	21%	43%	32%	20%	24%	44%	19%	21%	20%	22%	23%	30%	34%	18%	19%	24%	25%
Travel agent or tour operator website	27%	26%	21%	27%	40%	24%	24%	21%	16%	37%	32%	22%	32%	22%	16%	32%	19%	40%	16%	20%	25%
Travel blogs / forums	18%	21%	21%	19%	12%	27%	17%	20%	32%	22%	19%	17%	12%	29%	19%	35%	36%	20%	14%	22%	22%
Travel programme on TV	18%	21%	13%	24%	7%	20%	20%	19%	17%	27%	14%	15%	11%	23%	16%	25%	15%	15%	16%	20%	19%
A special offer or price deal you saw advertised online	25%	19%	21%	16%	26%	19%	15%	18%	18%	13%	17%	30%	16%	15%	23%	16%	23%	18%	18%	18%	19%
Travel agent or tour operator brochure	19%	19%	15%	22%	14%	19%	16%	20%	14%	25%	16%	19%	11%	16%	13%	21%	16%	15%	19%	14%	18%
An official tourist organisation website or social media site for the country or destination	19%	19%	15%	19%	23%	14%	16%	16%	18%	22%	17%	19%	11%	22%	17%	15%	14%	18%	23%	17%	18%
An official tourist brochure for the country / city / region	17%	19%	18%	19%	11%	28%	21%	22%	16%	21%	11%	15%	12%	15%	13%	14%	19%	13%	19%	16%	17%
A travel feature / article in a magazine or newspaper	14%	15%	14%	18%	20%	14%	23%	21%	12%	18%	9%	13%	16%	15%	15%	17%	16%	6%	17%	17%	16%
Direct advice from a travel agent/tour operator (face-to-face, over the phone)	17%	16%	14%	22%	10%	11%	15%	17%	12%	18%	9%	15%	4%	17%	17%	20%	13%	12%	19%	15%	16%
Images or videos your friends or family have posted to social media	11%	17%	14%	19%	9%	10%	10%	19%	13%	11%	9%	14%	6%	18%	23%	20%	13%	10%	17%	16%	15%
Images / information in online adverts	14%	18%	15%	13%	9%	6%	15%	16%	13%	11%	16%	12%	19%	21%	19%	10%	14%	17%	21%	17%	15%
A special offer or price deal you saw advertised offline e.g. in a newspaper, magazine or on TV	16%	14%	14%	16%	20%	11%	13%	19%	15%	14%	12%	17%	11%	17%	19%	9%	10%	9%	24%	14%	15%
Images or videos from a photo/video sharing social network site	9%	18%	11%	17%	4%	6%	11%	18%	15%	10%	5%	11%	7%	16%	22%	15%	14%	8%	24%	17%	14%
Travel app	11%	19%	13%	18%	5%	9%	8%	16%	8%	12%	8%	8%	8%	16%	22%	16%	14%	7%	16%	16%	14%
Images / information in adverts in a magazine or newspaper	9%	13%	9%	16%	10%	6%	12%	17%	12%	15%	7%	10%	10%	8%	15%	12%	12%	9%	18%	15%	12%
Articles on an online encyclopaedia e.g. Wikipedia, Wikitravel	9%	10%	10%	16%	6%	6%	12%	15%	12%	10%	6%	11%	16%	13%	15%	9%	9%	7%	17%	15%	12%
Images / information in TV adverts	9%	16%	9%	16%	3%	4%	8%	16%	10%	12%	7%	8%	5%	11%	15%	12%	7%	6%	17%	15%	11%
Seeing social media posts from celebrities talking about their holiday destinations	7%	11%	8%	12%	3%	3%	4%	14%	5%	6%	3%	6%	3%	6%	15%	13%	4%	3%	17%	12%	9%
Images / information on billboards / poster adverts	7%	9%	7%	11%	2%	4%	6%	13%	9%	6%	7%	7%	2%	8%	15%	6%	8%	7%	18%	11%	9%
Travel programme on radio	4%	7%	6%	7%	2%	6%	4%	9%	5%	5%	4%	3%	2%	6%	12%	5%	6%	4%	11%	9%	6%
Information in radio adverts	4%	8%	6%	7%	0%	3%	3%	9%	6%	4%	3%	2%	0%	5%	10%	4%	3%	2%	12%	11%	6%

QR3: (Visitors) Thinking about your holiday to Britain, which of the following information sources influenced your choice of destination? (Considerers) Thinking about the last holiday you took to a foreign country, which of the following information sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

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), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

Most online bookings are done using laptop or desktop computers. China, India, Gulf and Japan are more likely to book using tablets and smartphones compared to other markets.

Base: Visitors & Considerers

What device have people used to book previously? % Device for booking travel, accommodation & holidays

	TOT	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	KOR	SPA	SWE	USA	GULF	
Travel																					
Via a laptop / desktop	85%	90%	85%	91%	56%	86%	89%	88%	71%	95%	89%	82%	84%	87%	85%	77%	91%	89%	89%	56%	
Using mobile internet on your smartphone (not via an app)	3%	0%	6%	1%	6%	1%	3%	1%	4%	1%	2%	1%	2%	1%	3%	7%	1%	0%	2%	16%	
Using an app on a smartphone	4%	0%	5%	2%	27%	1%	2%	2%	19%	1%	3%	2%	1%	0%	2%	14%	2%	0%	1%	15%	
On a tablet (not via an app)	4%	5%	2%	3%	5%	7%	3%	5%	3%	2%	3%	8%	6%	6%	6%	0%	4%	6%	4%	5%	
Using an app on a tablet	2%	2%	3%	2%	6%	1%	2%	1%	2%	1%	2%	1%	4%	4%	4%	1%	2%	2%	3%	5%	
Don't know	2%	2%	0%	1%	0%	5%	1%	1%	0%	0%	2%	6%	3%	2%	0%	1%	0%	3%	1%	2%	
Accommodation																					
Via a laptop / desktop	82%	89%	81%	89%	46%	83%	86%	88%	66%	92%	87%	78%	81%	86%	80%	72%	91%	88%	88%	51%	
Using mobile internet on your smartphone (not via an app)	3%	1%	4%	2%	7%	2%	4%	2%	6%	1%	2%	3%	3%	1%	10%	10%	1%	2%	3%	12%	
Using an app on a smartphone	5%	1%	8%	2%	36%	1%	0%	1%	14%	2%	3%	5%	3%	0%	2%	13%	0%	0%	2%	19%	
On a tablet (not via an app)	5%	4%	4%	3%	2%	6%	7%	7%	6%	3%	3%	9%	7%	7%	3%	1%	5%	6%	4%	8%	
Using an app on a tablet	3%	2%	2%	2%	9%	2%	2%	1%	9%	2%	4%	1%	3%	3%	4%	4%	2%	2%	3%	6%	
Don't know	2%	2%	1%	2%	0%	5%	1%	1%	0%	0%	1%	5%	3%	2%	1%	1%	0%	2%	1%	5%	
Holiday																					
Via a laptop / desktop	74%	78%	69%	82%	48%	88%	82%	92%	62%	76%	82%	85%	77%	88%	84%	69%	87%	89%	67%	48%	
Using mobile internet on your smartphone (not via an app)	7%	5%	11%	3%	15%	1%	10%	3%	10%	8%	7%	0%	4%	1%	2%	6%	3%	2%	9%	16%	
Using an app on a smartphone	8%	1%	9%	4%	24%	0%	2%	1%	16%	6%	6%	3%	3%	0%	5%	14%	3%	0%	11%	15%	
On a tablet (not via an app)	5%	7%	8%	6%	4%	9%	3%	2%	5%	4%	3%	7%	8%	10%	4%	1%	2%	6%	6%	10%	
Using an app on a tablet	4%	6%	3%	4%	8%	0%	3%	0%	7%	4%	2%	2%	3%	1%	5%	6%	3%	2%	6%	11%	
Don't know	1%	3%	1%	0%	0%	2%	0%	2%	0%	2%	1%	2%	5%	1%	0%	3%	1%	1%	1%	1%	

QB5 And what did you use to book the following?

Base: Online bookers. Total (3,135), Australia (130), Brazil (190), Canada (178), China (261), India (267), Japan (162), New Zealand (100), Russia (112), Gulf (191), South Korea (177), United States (232), Denmark (130), France (118), Germany (102), Italy (191), Netherlands (82), Norway (169), Spain (173), Sweden (170)

Most long haul markets use online travel agencies to find the lowest price, compare prices and agree that they are a good way of finding a destination within budget.

Base: Visitors & Considerers

Q: To what extent do you agree with the following statements about booking travel through online travel agencies such as Lastminute.com or Expedia?



% Strongly agree & agree

Scores higher than global average highlighted/market

	Australia	USA	Canada	UK	Brazil	Russia	India	China	Japan	South Korea	UAE	UAE
They are usually the best way of getting the lowest price	50	66	61	54	67	46	74	64	51	64	65	58
I often compare prices from the websites of multiple online travel agencies	73	79	74	68	83	78	82	80	65	71	66	64
Online travel agencies are a good way of finding a destination within my budget	66	74	72	60	76	71	78	80	64	70	70	58

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

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 (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)

Among short haul markets agreement is generally lower, though all agree similarly that online travel agencies are a good way of finding a destination within budget. Travellers from Italy, Spain & France use online travel agencies to compare prices more often than others.

Base: Visitors & Considerers

Q: To what extent do you agree with the following statements about booking travel through online travel agencies such as Lastminute.com or Expedia?



% Strongly agree & agree

They are usually the best way of getting the lowest price	45	51	38	59	55	51	61	45
I often compare prices from the websites of multiple online travel agencies	58	60	63	74	62	68	73	63
Online travel agencies are a good way of finding a destination within my budget	60	60	60	66	63	61	66	61

For those who booked their travel separately, there is a variety of booking methods. Half from India booked through an online tour operator. A quarter from Gulf countries are using official tourist organisations and review websites, while Canada and New Zealand use traveller review sites.



% using the following to book their travel

Scores higher than global average highlighted/market

Base: Visitors & Considerers
Booked travel separately

											Gulf
Through an official tourist organisation website for the country or destination	1	2	0	5	3		3	8	0	2	14
Through an online-only tour operator website/ travel agency/ travel comparison website e.g. – Expedia, lastminute.com	22	42	29	26	34		51	38	41	37	23
Through a traditional tour operator / travel agency with an online presence	36	22	9	19	34	Base too low	13	11	27	34	12
Through a website providing traveller reviews of destinations and allowing direct booking e.g. TripAdvisor	8	15	23	24	17		21	21	15	7	23
Search engines which provide booking facilities e.g. Google	18	7	25	16	9		10	19	9	15	12
Online – other	14	13	13	10	3		1	3	8	5	17

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

Base: Booked travel separately (1428) – Australia (80), Brazil (42), Canada (84), China (90), India (90), Japan (93), New Zealand (91), Russia (25), Gulf (65), South Korea (173), USA (55)

Travel booking using online only tour operator/comparison websites is also the most popular amongst short haul markets (especially in Spain). Search engines with booking facilities are also popular in Denmark with 21% using this method.

Base: Visitors & Considerers
Booked travel separately



% using the following to book their travel

Scores higher than global average highlighted/market

Through an official tourist organisation website for the country or destination	0	0	3				3	3
Through an online-only tour operator website/ travel agency/ travel comparison website e.g. – Expedia, lastminute.com	44	36	36				52	25
Through a traditional tour operator / travel agency with an online presence	12	18	4	Base too low	Base too low	Base too low	8	16
Through a website providing traveller reviews of destinations and allowing direct booking e.g. TripAdvisor	3	17	7				15	15
Search engines which provide booking facilities e.g. Google	21	10	9				11	16
Online – other	20	18	40				10	24

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

Base: Booked travel separately (1428) –Denmark (74), France (44), Germany (46), Italy (64), Netherlands (34), Norway (80), Spain (96), Sweden (101)

We see the same trend when booking accommodation for long haul travellers, who use online only tour operators/ comparison websites most (used most in Japan). Traditional tour operators and review sites are also popular in Brazil (review sites also popular in India).

Base: Visitors & Considerers
Booked accommodation separately

% using the following to book their accommodation

Scores higher than global average highlighted/market

LONG HAUL	Australia	USA	Canada	China	Brazil	Russia	India	China	Japan	South Korea	Gulf
Through an official tourist organisation website for the country or destination	0	8	0	1	4		7	10	0	4	13
Through an online-only accommodation booking website/ travel agency/comparison website e.g. – Expedia, hotels.com, AirBnB	51	49	59	52	37		41	40	74	64	35
Through a traditional tour operator / travel agency with an online presence	16	16	10	6	24	Base too low	17	13	8	11	10
Through a website providing traveller reviews of destinations and allowing direct booking e.g. TripAdvisor	13	14	17	23	27		25	23	10	12	22
Search engines which provide booking facilities e.g. Google	10	2	8	11	4		9	10	5	8	6
Online – other	10	12	7	7	4		-	4	3	1	15

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

Base: Booked accommodation separately (1428) – Australia (84), Brazil (59), Canada (71), China (96), India (75), Japan (106), New Zealand (64), Russia (34), Gulf (68), South Korea (152), USA (51)

When booking accommodation short haul travellers are most likely to use online only accommodation/comparison websites most, with Italy highest at 80%.

Base: Visitors & Considerers
Booked accommodation separately

% using the following to book their accommodation

Scores higher than global average highlighted/market

SHORT HAUL								
Through an official tourist organisation website for the country or destination	0	1	4	2	6	0	3	2
Through an online-only accommodation booking website/ travel agency/comparison website e.g. – Expedia, hotels.com, AirBnB	64	60	64	80	72	58	67	73
Through a traditional tour operator / travel agency with an online presence	11	8	1	3	2	5	6	2
Through a website providing traveller reviews of destinations and allowing direct booking e.g. TripAdvisor	5	15	6	9	11	13	11	6
Search engines which provide booking facilities e.g. Google	12	6	7	4	2	13	8	7
Online – other	9	10	18	2	6	11	5	10

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

Base: Booked accommodation separately (1428) –Denmark (92), France (55), Germany (55), Italy (116), Netherlands (50), Norway (133), Spain (119), Sweden (114)

The method used to book a holiday is diverse within long haul markets: online-only tour operators, traditional tour operators (driven by South Korea, 47% & Japan, 41%), and online-only accommodation booking sites, such as Expedia. Gulf is also more likely to use official tourist organisation and review websites than other markets.

Base: Visitors & Considerers Booked travel & accommodation together

LONG HAUL

% using the following to book their holiday
Scores higher than global average highlighted/market

											Gulf
Through an official tourist organisation website for the country or destination	4	9	2	5	8	8	4	9	1	2	16
Through an online-only tour operator website/ travel agency/ travel comparison website e.g. – Expedia, lastminute.com	17	20	23	19	21	16	32	26	24	22	15
Through an online-only accommodation booking website/ travel agency/comparison website e.g. – Expedia, hotels.com, AirBnB	20	25	36	34	39	41	36	26	24	19	39
Through a traditional tour operator / travel agency with an online presence	35	15	12	16	21	14	10	17	41	47	7
Through a website providing traveller reviews of destinations and allowing direct booking e.g. TripAdvisor	10	13	13	11	8	8	9	10	3	2	11
Search engines which provide booking facilities e.g. Google	14	13	8	11	3	8	9	11	4	7	9
Online – other	0	6	5	3	1	5	0	1	3	1	2

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

Base: Booked travel and accommodation together (2158) – Australia (73), Brazil (143), Canada (101), China (245), India (162), Japan (176), New Zealand (54), Russia (74), Gulf (97), South Korea (164), USA (109)

Similar trend in short haul markets: traditional tour operators (most likely in Denmark & Sweden), online-only accommodation booking operators (most likely in Italy & Spain) and online-only tour operators (most likely in France) are most used. Germans also use travel review sites whereas Netherlands also use search engines more.

Base: Visitors & Considerers
Booked travel & accommodation together

% using the following to book their holiday

Scores higher than global average highlighted/market

SHORT HAUL								
Through an official tourist organisation website for the country or destination	0	3	3	5	3	2	3	6
Through an online-only tour operator website/ travel agency/ travel comparison website e.g. – Expedia, lastminute.com	19	13	22	18	28	33	23	16
Through an online-only accommodation booking website/ travel agency/comparison website e.g. – Expedia, hotels.com, AirBnB	16	16	22	36	26	14	39	22
Through a traditional tour operator / travel agency with an online presence	46	52	35	16	23	32	19	25
Through a website providing traveller reviews of destinations and allowing direct booking e.g. TripAdvisor	5	9	6	13	16	5	8	8
Search engines which provide booking facilities e.g. Google	3	5	6	9	5	5	6	15
Online – other	10	2	7	2	0	9	2	7

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

Base: Booked travel and accommodation together (2158) –Denmark (104), France (57), Germany (77), Italy (91), Netherlands (54), Norway (128), Spain (108), Sweden (141).



VisitBritain Decisions and Influences

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