Britain and Competitors
Research Background

**What?**
Understand the overall holiday decision-making process across key inbound markets, focusing 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

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<th>Sample size</th>
<th>New Zealand (NZ)</th>
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<th>Brazil (BR)</th>
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<th>India (IN)</th>
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<th>Italy (IT)</th>
<th>Germany (GE)</th>
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**Terminology:**

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

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

- **This report is the first of three.** It looks at knowledge of, and interest in Britain compared to its competitive set. The second report, Researching and Planning a Holiday, provides information about motivations, information sources, and timings for the planning process. The third report, Booking a Holiday, provides information about booking channels and websites, and also about which trip elements are booked in advance of travel.

- **Markets:** The analysis often starts off looking at overall findings for the total sample as well as Long Haul and Short Haul markets (defined in the previous slide) before looking at market level details.

- **Appendix:** For many sections, more detail by market is available in an Appendix at the end of the report.

- **Base:** Each slide gives details on the base for each question. Some questions were asked to Visitors (respondents who have previously visited Britain), some to Considerers (those who would consider visiting Britain in the next five years) and some to both.

- Other reports can be downloaded here: [https://www.visitbritain.org/visitor-characteristics-and-behaviour](https://www.visitbritain.org/visitor-characteristics-and-behaviour)
What will we cover within ‘Britain & Competitors’ section?

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

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

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

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

% travellers who have taken trips of each kind

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<tr>
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<th>Long Haul</th>
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<td>1-2 trips</td>
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<tr>
<td>1-3 nights holiday</td>
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<tr>
<td>4+ nights holiday</td>
<td>50%</td>
<td>45%</td>
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<tr>
<td>Business trip</td>
<td>22%</td>
<td>12%</td>
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% 3-5 trips

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<td>1-3 nights holiday</td>
<td>16%</td>
<td>23%</td>
</tr>
<tr>
<td>4+ nights holiday</td>
<td>29%</td>
<td>31%</td>
</tr>
<tr>
<td>Business trip</td>
<td>13%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Business trip high for: India (20%), China (18%), Saudi Arabia (21%)
4+ nights high for: Netherlands (39%)

Note: Market level data in appendix

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 Long haul (6600), Short haul (4800)
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?

**Length of Holiday to Britain** (nights)

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<tr>
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<th>Long Haul</th>
<th>Short Haul</th>
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<tbody>
<tr>
<td>1-3 nights</td>
<td>16%</td>
<td>29%</td>
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<tr>
<td>4-7 nights</td>
<td>45%</td>
<td>53%</td>
</tr>
<tr>
<td>8+ nights</td>
<td>38%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Note: Market level data in appendix

Q: How long was your holiday to Britain?

Base: Visitors

QC8 How long was your holiday to Britain?

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

Length of Holiday to Britain (nights)

- Breakdown:
  - 1-3 nights
  - 4-7 nights
  - 8-14 nights
  - 15+ nights

- Average:
  - Base: Visitors
  - Average across all short haul or long haul markets to compare against specific markets

What market cluster is most likely to go on a holiday for...

What market specifically is driving this?

Significance testing to signpost which market is driving a particular cluster (if any)

▲▼ significantly higher/ lower @ 95% confidence level
Amongst long haul markets, Advanced Asia have had more shorter breaks to Britain whereas travellers from Gulf markets and New Zealand/Australia have taken longer trips.

Q: How long was your holiday to Britain?

Length of Holiday to Britain (nights)

Most likely to take a holiday of this length: Advanced Asia

Driven by:

- **1-3 nights**
  - **29%** Advanced Asia
  - Both Japan & South Korea

- **4-7 nights**
  - **50%** Advanced Asia
  - Japan
  - **54%** vs. South Korea
  - UAE
  - **37%** vs. Saudi Arabia

- **8-14 nights**
  - **29%** Gulf

- **15+ nights**
  - **26%** English speaking
  - Australia
  - **35%** vs. United States
  - New Zealand
  - **47%** vs. Canada
  - Canada

Note: Market level data in appendix

Q: How long was your holiday to Britain?

Base: Visitors

QCB 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?

Length of Holiday to Britain (nights)

Most likely to take a holiday of this length:

- **1-3 nights**
  - France: 40%
  - NL: 38%
  - vs Spain: 17%
  - Germany: 18%
  - Italy: 20%
  - Average: 29%

- **4-7 nights**
  - Sweden: 63%
  - Spain: 61%
  - vs France: 45%
  - Netherlands: 41%
  - Average: 53%

- **8-14 nights**
  - Germany: 22%
  - Spain: 18%
  - vs France: 8%
  - Sweden: 6%
  - Average: 13%

- **15+ nights**
  - Germany: 9%
  - France: 6%
  - Average: 4%

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.

Q: How long was your holiday to Britain?

**Length of Holiday to Britain** (nights)

- **1-7 nights**
  - 18-34 yo: 75%
  - 55+ yo: 63%

- **4+ nights**
  - Parents with kids aged up to 18y: 83%
  - (vs 74% amongst non-parents)

**Note:** Market level data in appendix

QCB 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.

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

Travel companion when visited Britain

- Spouse/Partner: 64%
- Children under 16: 19%
- On your own: 10%
- With friends: 18%

Similar trend for short haul and long haul.

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

Note: Market level data in appendix

QC9 Thinking about your holiday to Britain, who did you go with?
Base: Visitors (5700)
Those aged 18-34 are more likely to travel on their own or with friends. A quarter of those aged 35-54 travelled to Britain with their children.

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

**18-34 years**
- **On your own**: 17% (vs. 8% (55+s))
- **With friends**: 20% (vs. 15% (35-54s), vs. 15% (55+s))

**35-54 years**
- **Children under 16**: 27% (vs. 15% (18-34s), vs. 7% (55+s))

**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)**
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.

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: 41%
- Germany: 28%
- Switzerland: 17%
- Spain: 20%
- Italy: 27%
- USA: 17%
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.

### Alternative Destination: France

- **Australia**: 49%
- **Canada**: 33%
- **New Zealand**: 34%
- **USA**: 29%

### Alternative Destination: Ireland

- **Australia**: 30%
- **Canada**: 26%
- **New Zealand**: 27%
- **USA**: 23%

### Alternative Destination: Italy

- **Australia**: 45%
- **Canada**: 44%
- **New Zealand**: 47%
- **USA**: 42%

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**: 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.

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

- France: 25%
- Germany: 13%
- Ireland: 18%
- Netherlands: 9%
- Italy: 9%
- Spain: 13%

"BRITAIN WAS THE ONLY COUNTRY I CONSIDERED FOR THAT TRIP": 35%

Base: Visitors

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.

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</table>

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* – Germany (120), Italy (106), Spain (76), France (44), Netherlands (66)), Sweden (52)
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

Mean score:
GB 5.6
FR 5.5
GR 5.1
IT 5.5

QC6 How much do you feel you know about each of these countries as a holiday destination?
Base: Considerers France (1321), Germany (1096), Britain (5700), Italy (1374)
When comparing Britain and its key competitors, we see the same trend – long haul considerers feel they have significantly more knowledge for the four destinations.

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

Base: Considerers

Significantly higher/ lower vs Short Haul @ 95% confidence level

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

Considerers France (1321), Germany (1096), Britain (5700), Italy (1374)
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

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<td>KOR</td>
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**Key**
- **High** = 7-9
- **Medium** = 4-6
- **Low** = 1-3

**Average all destinations**

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<tr>
<td>KOR</td>
<td>47%</td>
<td>45%</td>
</tr>
<tr>
<td>SAU</td>
<td>22%</td>
<td>19%</td>
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**% Average destination knowledge vs knowledge of Britain (circles show difference between Britain and Competitors)**

**Short-Haul**

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**Average all global markets**

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<td>SWE</td>
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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?

<table>
<thead>
<tr>
<th>% Likelihood to visit Britain</th>
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<tr>
<td><strong>LONG HAUL</strong></td>
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<td>58</td>
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<td>37</td>
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<td><strong>SHORT HAUL</strong></td>
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<td>DM</td>
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<td>55</td>
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<tr>
<td>38</td>
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<tr>
<td>8</td>
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</tbody>
</table>

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.

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

Base: Considerers

NC7: How likely are you to visit Britain for a holiday in the next 5 years?
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.