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
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

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Total (70%)</th>
<th>Long Haul (79%)</th>
<th>Short Haul (59%)</th>
<th>Short Haul (54%)</th>
<th>Long Haul (58%)</th>
<th>TOTAL (48%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like to plan my holiday carefully before I leave</td>
<td>70%</td>
<td>79%</td>
<td>59%</td>
<td>54%</td>
<td>58%</td>
<td>48%</td>
</tr>
<tr>
<td>I like to be spontaneous on holiday and decide on some of my itinerary at the last minute</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Higher in USA (72%), India (70%), Japan (72%) and Italy (74%)*

*Higher in Brazil (87%), India (89%) and China (89%)*
Whilst most markets prefer planning their holiday, US, India, Japan, UAE, Norway & Netherlands are also equally spontaneous in their holiday planning.

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

**% (Strongly agree & agree)**

### Long Haul

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

### Short Haul

<table>
<thead>
<tr>
<th>Country</th>
<th>DM</th>
<th>SW</th>
<th>NW</th>
<th>IT</th>
<th>GE</th>
<th>FR</th>
<th>SP</th>
<th>NE</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like to be spontaneous on holiday and decide on some of my itinerary at the last minute</td>
<td>42</td>
<td>53</td>
<td>33</td>
<td>55</td>
<td>38</td>
<td>56</td>
<td>58</td>
<td>53</td>
</tr>
<tr>
<td>I like to plan my holiday carefully before I leave</td>
<td>58</td>
<td>48</td>
<td>56</td>
<td>74</td>
<td>68</td>
<td>65</td>
<td>73</td>
<td>28</td>
</tr>
</tbody>
</table>

**Top per market Highlighted**

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

**Base: Visitors & Considerers**

- **Average global markets**:
  - Long Haul: 54%
  - Short Haul: 70%

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**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...

**STAGE 1:** Research Destinations

**STAGE 2:** Shortlist options

**STAGE 3:** Final Choice

**STAGE 4:** Make the Booking
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

- **STAGE 1:** Research Destinations
  - I do: 34%
  - Both get involved: 51%

- **STAGE 2:** Shortlist options
  - I do: 43%
  - Both get involved: 37%

- **STAGE 3:** Final Choice
  - I do: 47%
  - Both get involved: 39%

- **STAGE 4:** Make the Booking
  - I do: 25%
  - Both get involved: 58%

(remainder: my partner/travel companion does; I/we decide with children; Someone else)

Note: Market level data in appendix

**Q1:** 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.

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

Research destinations

- “I do”
- “Both get involved”

Make the final choice

<table>
<thead>
<tr>
<th></th>
<th>Short Haul</th>
<th>Long Haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research destinations</td>
<td>42</td>
<td>45</td>
</tr>
<tr>
<td>Make the final choice</td>
<td>55</td>
<td>28</td>
</tr>
</tbody>
</table>

Particularly strong for: Japan (64%), Brazil (70%)

Particularly strong for: Denmark (76%), Sweden (70%)

(Remainder: my partner/travel companion does; I/we decide with children; Someone else)

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)
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).

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

Base: Visitors & Considerers

No gender skews for the ‘research’ and ‘shortlist phase’

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), 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?

<table>
<thead>
<tr>
<th></th>
<th>Advanced Asia</th>
<th>Emerging Markets</th>
<th>Gulf</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final Choice</td>
<td>73% Males</td>
<td>46% Males</td>
<td>44%</td>
</tr>
<tr>
<td></td>
<td>53% Females</td>
<td>35% Females</td>
<td>27%</td>
</tr>
<tr>
<td>Booking</td>
<td>78% Males</td>
<td>62% Males</td>
<td>51%</td>
</tr>
<tr>
<td></td>
<td>65% Females</td>
<td>51% Females</td>
<td>34%</td>
</tr>
</tbody>
</table>

% ‘I do’ across countries

Note: Market level data in appendix

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

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?

Who makes the **final choice?**

<table>
<thead>
<tr>
<th>Country</th>
<th>Males</th>
<th>Females</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td>28%</td>
<td>37%</td>
</tr>
<tr>
<td><strong>Italy</strong></td>
<td>30%</td>
<td>40%</td>
</tr>
<tr>
<td><strong>Denmark</strong></td>
<td>60%</td>
<td>52%</td>
</tr>
<tr>
<td><strong>Netherlands</strong></td>
<td>60%</td>
<td>56%</td>
</tr>
<tr>
<td><strong>Germany</strong></td>
<td>65%</td>
<td>60%</td>
</tr>
</tbody>
</table>

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

Who is driving this?

% ‘I do’ across countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Males</th>
<th>Females</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td><strong>Italy</strong></td>
<td>51%</td>
<td>52%</td>
</tr>
<tr>
<td><strong>Denmark</strong></td>
<td>52%</td>
<td>49%</td>
</tr>
<tr>
<td><strong>Netherlands</strong></td>
<td>56%</td>
<td>49%</td>
</tr>
<tr>
<td><strong>Germany</strong></td>
<td>60%</td>
<td>56%</td>
</tr>
</tbody>
</table>

Who makes the **booking?**

Who is driving this?

<table>
<thead>
<tr>
<th>Country</th>
<th>Males</th>
<th>Females</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td>60%</td>
<td>45%</td>
</tr>
<tr>
<td><strong>Italy</strong></td>
<td>60%</td>
<td>56%</td>
</tr>
<tr>
<td><strong>Denmark</strong></td>
<td>52%</td>
<td>46%</td>
</tr>
<tr>
<td><strong>Netherlands</strong></td>
<td>56%</td>
<td>49%</td>
</tr>
<tr>
<td><strong>Germany</strong></td>
<td>60%</td>
<td>56%</td>
</tr>
</tbody>
</table>

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
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.

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.)  
  44%

**Driven by:**

- Females 47% vs Males (42%)
- 35+ yo 48% vs 18-34yo (38%)

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

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. **Cultural attraction**
   - Considerers: 47% ▲
   - vs Visitors (42%)
   - 18-24 yrs: 40%; 65-74 yrs: 54%

2. **Good deals (flights, package etc.)**
   - Considerers: 32% ▲
   - vs Visitors (18%)
   - 18-24 yrs: 32%; 65-74 yrs: 54%

3. **Countryside & natural beauty**
   - Considerers: 31% ▲
   - vs Visitors (22%)
   - 18-24 yrs: 21%; 65-74 yrs: 37%

4. **Variety of places to visit**
   - Considerers: 29% ▲
   - vs Visitors (25%)
   - 18-24 yrs: 40%; 65-74 yrs: 54%

5. **Wanted to go somewhere new**
   - Considerers: 28% ▲
   - vs Visitors (23%)
   - 18-24 yrs: 32%; 65-74 yrs: 22%

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)
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

### Other differences by markets

**Gulf:**
- Low importance to cultural attractions (UAE – 27%; KSA – 17%)
- Climate more important (UAE – 30%; KSA – 35%)
- Countryside more important for KSA (32%)

**Brazil:**
High importance of different culture (39%)

**AU/NZ:**
Visiting friends/family more important (AU – 32%; NZ – 50%)

**China:**
Sampling food is important (41%)

UAE/Spain/Norway/Netherlands give ‘good deals’ more important

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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)
### Q: 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?

<table>
<thead>
<tr>
<th>% Top reasons to visit Britain/holiday destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scores adjusted for market comparability (see notes)</td>
</tr>
<tr>
<td>AUS</td>
</tr>
<tr>
<td>Cultural attractions e.g. historic buildings and famous sights</td>
</tr>
<tr>
<td>A wide variety of places to visit around the country</td>
</tr>
<tr>
<td>I'd never been before and wanted to go somewhere new</td>
</tr>
<tr>
<td>Possibility of visiting friends or relatives</td>
</tr>
<tr>
<td>Somewhere where they speak English</td>
</tr>
<tr>
<td>Easy to get around</td>
</tr>
<tr>
<td>Countryside and natural beauty</td>
</tr>
<tr>
<td>Vibrant cities</td>
</tr>
<tr>
<td>The ease of getting to the country</td>
</tr>
<tr>
<td>A mix of old and new</td>
</tr>
<tr>
<td>A culture that is different from our own</td>
</tr>
<tr>
<td>A good deal e.g. on flights, total holiday package</td>
</tr>
<tr>
<td>Sampling the local food and drink</td>
</tr>
<tr>
<td>Contemporary culture (e.g. music, films, art, literature)</td>
</tr>
<tr>
<td>Security / safety</td>
</tr>
<tr>
<td>Easy to get plan/organise</td>
</tr>
<tr>
<td>Accommodation – variety and quality</td>
</tr>
<tr>
<td>A wide range of holiday activities</td>
</tr>
<tr>
<td>Meeting the local people</td>
</tr>
<tr>
<td>The cost of staying in the destination</td>
</tr>
<tr>
<td>The climate / weather</td>
</tr>
<tr>
<td>Watching sport</td>
</tr>
<tr>
<td>Visit a film or TV location</td>
</tr>
<tr>
<td>Somewhere it is easy to visit with children</td>
</tr>
</tbody>
</table>

**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:** Visitors & Considerers
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.

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

1. Information from search engines
   - 33%

2. Price comparison websites
   - 31%

3. Websites providing traveller reviews (e.g. Tripadvisor)
   - 30%

4. Accommodation provider/hotel website
   - 26%

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). 

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?

<table>
<thead>
<tr>
<th>% Online information sources as influencers of destination choice</th>
<th>Long Haul</th>
<th>Short Haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel agent or tour operator website</td>
<td>30%</td>
<td>17%</td>
</tr>
<tr>
<td>An accommodation provider/ hotel website</td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td>Talking to friends or family in your social network</td>
<td>31%</td>
<td>20%</td>
</tr>
<tr>
<td>None of these</td>
<td>18%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Particularly strong for Brazil (38%), China (46%), India (40%), Japan (35%) & South Korea (39%)

Particularly strong for Russia (37%), Netherlands (33%), Japan (33%), Norway (31%) & USA (31%)

Not as strong for Japan (12%)

Particularly high for Germany (29%), Norway (36%), Sweden (35%), Denmark (40%) & France (34%)

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.

Which online sources influenced people the most?

<table>
<thead>
<tr>
<th>#1</th>
<th>Information from search engines [e.g. Google]</th>
</tr>
</thead>
<tbody>
<tr>
<td>33%</td>
<td></td>
</tr>
</tbody>
</table>

**#1 in...**
- IN: 48%
- RU: 45%
- SK: 44%
- NE: 34%
- GE: 33%
- CA: 33%
- NZ: 37%
- SA: 31%
- UA: 38%
- AU: 36%
- BR: 43%
- IT: 38%
- US: 40%

<table>
<thead>
<tr>
<th>#2</th>
<th>Looking at prices of holidays/flights on price comparison websites</th>
</tr>
</thead>
<tbody>
<tr>
<td>31%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#3</th>
<th>Websites providing traveller reviews of destinations [e.g. TripAdvisor]</th>
</tr>
</thead>
<tbody>
<tr>
<td>30%</td>
<td></td>
</tr>
</tbody>
</table>

Travel blogs also influential in...

- Brazil: 31%
- South Korea: 37%
- Russia: 43%
- Spain: 30%
- Italy: 28%

Note: Market level data in appendix

Base: Visitors & Considerers
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.

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

WOM

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

41%

The same pattern is seen for both Visitors & Considerers

40%

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)

Note: Market level data in appendix
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.

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

**% Offline information sources as influencers**

- **Travel guidebooks**: 30% (Long Haul 18%, Short Haul 40%)
- **Travel programs on TV**: 25% (Long Haul 18%, Short Haul 10%)
- **Travel agents**: 24% (Long Haul 10%, Short Haul 34%)

**Note:**
For short haul markets, 35% mention ‘none of these’

**Note: Market level data in appendix**

**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),

△▼ significantly higher/ lower @ 95% confidence level
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.

**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?

**Base:** Visitors & Considerers

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Emerging markets</th>
<th>Advanced Asia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Images / information in TV adverts</td>
<td>23%</td>
<td>39%</td>
</tr>
<tr>
<td>Official tourist Brochures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adverts in print media</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel guidebooks</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>17%</td>
<td>25%</td>
</tr>
</tbody>
</table>

**Note:** Market level data in appendix

△ ▼ significantly higher/ lower @ 95% confidence level
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.

Which other sources influenced people the most?

Top offline sources – by rank per market

<table>
<thead>
<tr>
<th>#1</th>
<th>40%</th>
<th>Talking to friends / relatives / colleagues</th>
</tr>
</thead>
<tbody>
<tr>
<td>AU</td>
<td>40%</td>
<td>IT</td>
</tr>
<tr>
<td>BR</td>
<td>46%</td>
<td>CA</td>
</tr>
<tr>
<td>FR</td>
<td>37%</td>
<td>GE</td>
</tr>
<tr>
<td>JP</td>
<td>41%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#2</th>
<th>25%</th>
<th>A travel guidebook</th>
</tr>
</thead>
<tbody>
<tr>
<td>DM</td>
<td>46%</td>
<td>NE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#3</th>
<th>19%</th>
<th>Travel programme on TV</th>
</tr>
</thead>
</table>

Base: Visitors & Considerers

Note: Market level data in appendix
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.

**When do people start looking to come to Britain?**

<table>
<thead>
<tr>
<th>Activity</th>
<th>More than 6 months</th>
<th>3 - 6 months</th>
<th>1-2 months</th>
<th>Less than 1 month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start thinking</td>
<td>49%</td>
<td>32%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>Decide on destination</td>
<td>32%</td>
<td>40%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Look at prices/ flights/travel</td>
<td>22%</td>
<td>39%</td>
<td>28%</td>
<td>12%</td>
</tr>
<tr>
<td>Book the trip</td>
<td>14%</td>
<td>34%</td>
<td>30%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Note: Market level data in appendix

**Q5:** Thinking about your holiday to Britain, how far in advance did you...?
**Base:** Visitors (5700)
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.

### When do people start looking to come to Britain?

| Time Frame          | 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     | 3%  | 7%  | 5%  | 3% | 4%  | 4%  | 4%  | 6%  | 1%  | 4%  | 6%  | 10% | 6%  | 7%  | 7%  | 7%  | 5%  | 8%  | 7%  | 8%  |
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.

When do people book their trip to Britain?

| Long-Haul Destinations | AUS | USA | CAN | NZ | BRA | RUS | IND | CHI | JAP | KOR | SAU | UAE | DEN | SWE | NOR | ITA | GER | FRA | SPA | NET |
|------------------------|-----|-----|-----|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 6+ months before trip  | 35% | 20% | 18% | 38%| 23% | 8%  | 10% | 8%  | 11% | 10% | 7%  | 9%  | 12% | 6%  | 9%  | 7%  | 15% | 7%  | 7%  | 7%  |
| 3-6 months before      | 38% | 31% | 37% | 33%| 37% | 23% | 20% | 13% | 37% | 22% | 22% | 9%  | 40% | 36% | 45% | 40% | 44% | 37% | 30% | 29% |
| 1-2 months before      | 14% | 17% | 24% | 15%| 22% | 34% | 35% | 32% | 37% | 38% | 27% | 20% | 30% | 34% | 27% | 30% | 17% | 29% | 44% | 28% |
| Less than 1 month      | 11% | 25% | 19% | 10%| 15% | 32% | 32% | 44% | 12% | 25% | 34% | 38% | 9%  | 19% | 13% | 20% | 19% | 23% | 17% | 26% |

Note: Market level data in appendix
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.