

First-time and Repeat Visits to Britain

Foresight – issue 149

VisitBritain Research



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Introduction

In this report we will be looking at repeat visitors to Britain, to understand what proportion of visitors are repeaters, what their characteristics are, and asking the question of what their long-term value to Britain is. Increasingly, tourism is becoming more and more competitive and diverse, making it potentially harder to encourage repeat visits when there are so many potential destinations to visit.

In 2015, VisitBritain sponsored questions on the International Passenger Survey to understand how many visitors had come to Britain before in the last ten years, and if so, how many times they had visited during that period, and for what purpose.

This was a repeat of a question asked in 2009, on whether this was a first or repeat visit to the UK, so in some instances we can compare 2009 and 2015 results. However, the 2015 questions go into more depth, so for the most part we will be focussing on 2015 results.

In summary

- A high proportion (77%) of visits to the UK are repeat visits, which is the same as in 2009.
- Repeat visitors spent £15.1bn in the UK in 2015.
- Business visits are most likely to be repeat visits (92%), followed by visits to see friends or relatives (85%) and 63% of holiday visits were repeat trips.
- Certain markets are more likely to make repeat visits:
 - Neighbouring European markets are likely to repeat visits; Irish Republic (92%), Iceland (83%), Norway (92%) and Belgium (80%) have the highest proportion.
 - Outside of Europe, some Gulf markets and South Africa have a high likelihood to make repeat visits.
- London attracts a high proportion of travellers to the UK, and among holiday visitors staying in one region/nation only, 68% of first-time and 66% of repeat visits.
 - Rest of England attracts a higher proportion of repeat visits than first-timers, with 24% of repeat visitors in 2015 staying in regional England.
 - Scotland welcomed 10% of the UK's first-time visits in 2015. This region has a higher proportion of first-time visits than repeat visits.

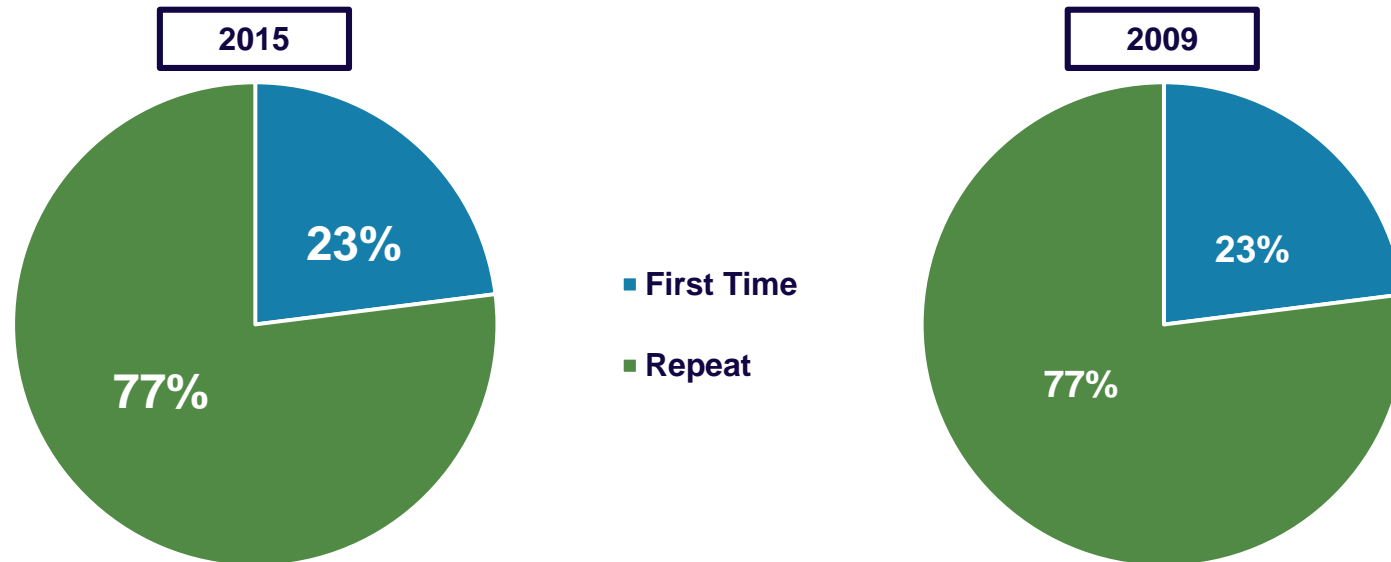


Repeat visits overview

Frequency of first-time and repeat visits

In 2015, 77% of visits to Britain were repeat visits, meaning that the visitor had previously travelled to Britain within the past ten years. This is a high proportion of repeat visits, but encompasses all journey purposes. This proportion of repeat visits is directly in line with 2009, meaning that Britain is still receiving the same balance of first-time (or lapsed) and repeat visits year on year.

We are able to look into the different journey purposes, UK regions visited and other aspects to help us understand in greater detail who First-time and Repeat visitors are.

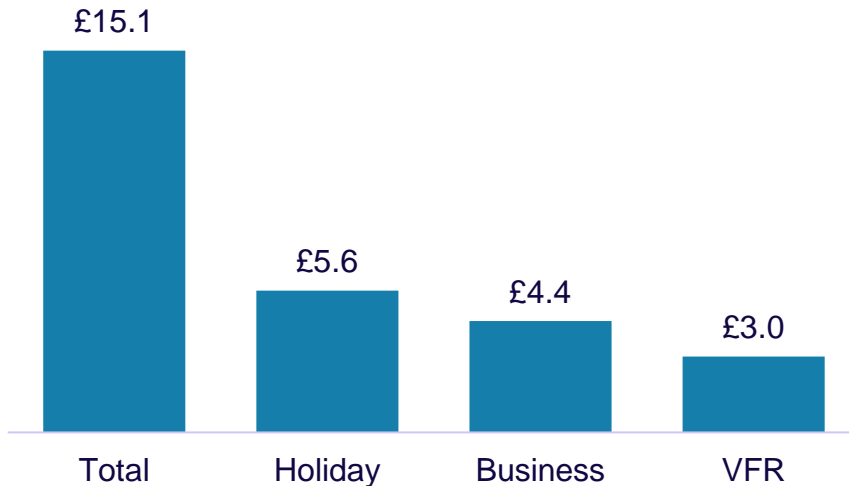


The value of repeat visits

In 2015, repeat visitors spent **£15.1 billion** in the UK out of a total of £22.1bn.

On average, visitors have made **3.3** trips to the UK in the past 10 years. Visitors spent **£607** on average in 2015* and this equates to a ten year value of **£2,003** per visitor.

2015 value of repeat visits (£ bn)



Source: International Passenger Survey 2015

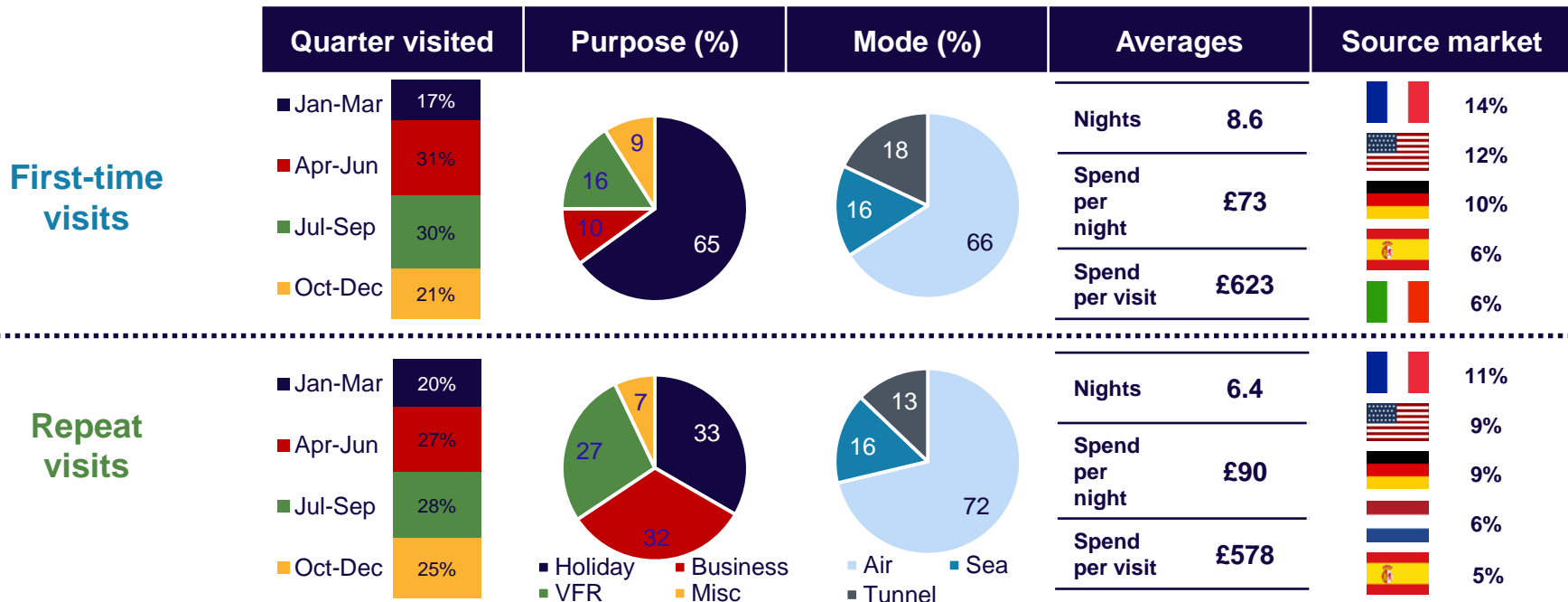
Base: First-time visits n=7,721, Repeat visits n=27,984.

*Value of repeat visits excludes UK nationals (expats) and allocates any 'Don't know' responses proportionately.

Who are First-time and Repeat visitors?

First-time visitors are more likely to visit during the spring and summer than repeaters, and holiday is the key purpose. First time visits are likely to be lower value per night (£73) than Repeat visits, but have a longer duration and consequently a higher average spend per visit. First-time visits over-index from France and the USA.

Repeat visitors are more likely to be visiting friends and relatives than first timers, although a third are repeating a holiday trip. Repeat visits are more likely to fly to Britain and have a higher spend per night.



Source: International Passenger Survey 2015

Base: First-time visits n=7,721, Repeat visits n=27,984 (excludes UK nationals (expats))



Repeat visits by journey purpose

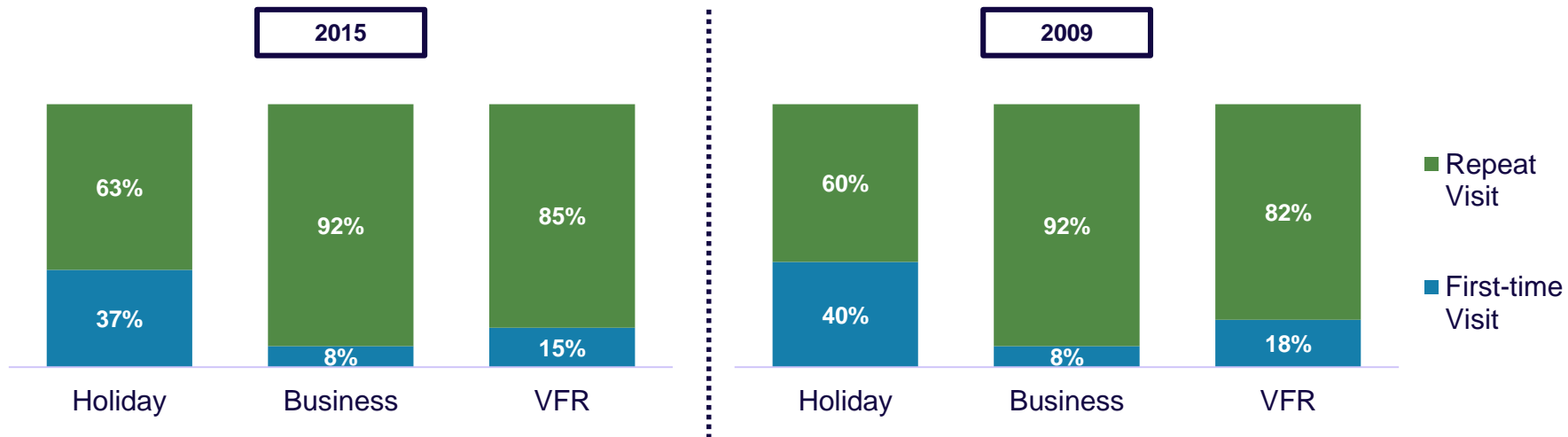
Frequency of repeat visits by purpose

Business visits are most likely to be repeats, with 92% of business visits in 2015 a repeat trip to Britain. This is directly comparable to 2009.

Visits to friends or relatives (VFR) also have a high likelihood to be repeated, as 85% of VFR visits last year were not for the first time.

Holiday visits are less likely to be repeated, which is unsurprising due to the great freedom of choice in destinations available for leisure travel, and without incentives such as to visit family, friends or for business.

In 2015, 63% of holiday trips were a repeat visit to Britain, and this is a slight increase on 2009, when 60% of holiday visits were a repeat. However, holiday visits are the biggest inbound journey purpose, and are higher spending than VFR, so encouraging repeat visits of this nature would be beneficial.



Source: International Passenger Survey 2009 & 2015

Base: All visits excluding UK nationals (expats) **2015:** Holiday n=14,788, Business n=9,800, VFR n=9,311 **2009:** Holiday n=16,735, Business n=9547, VFR n=10159

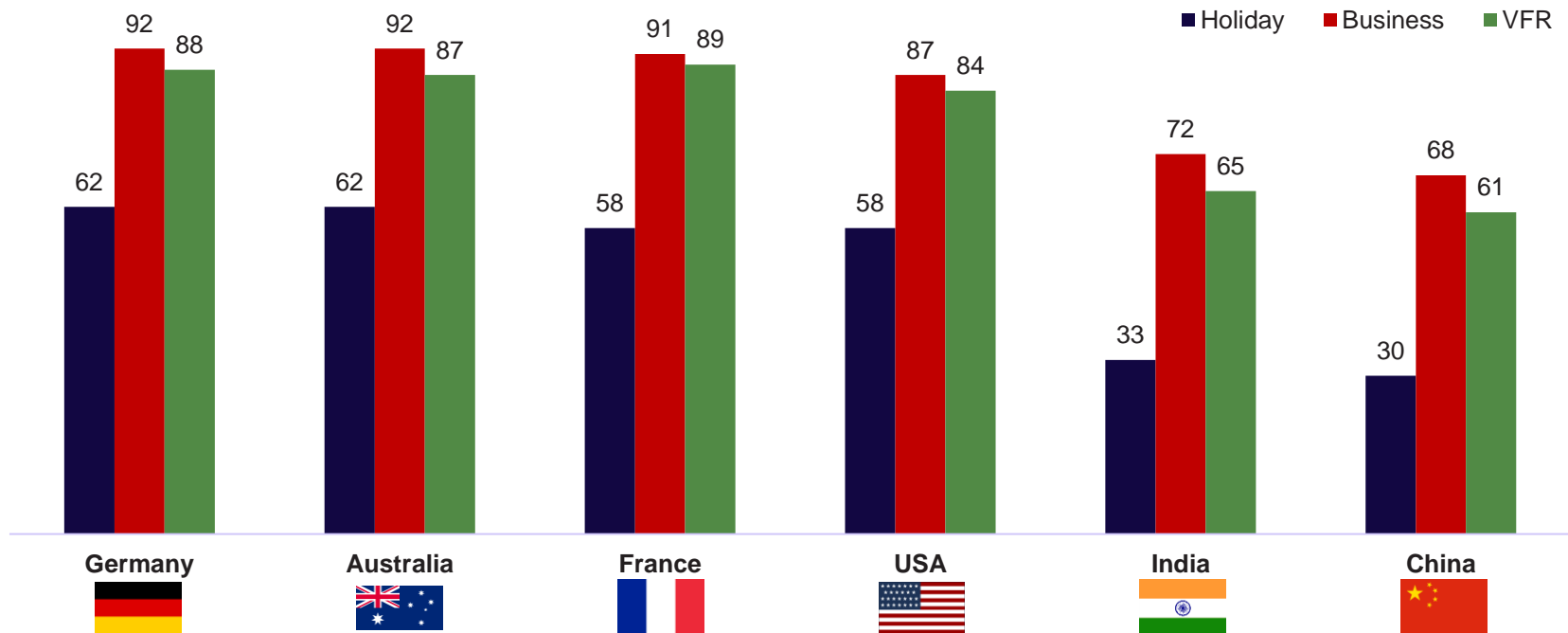
Repeat visits by journey purpose and market

Across all markets, holiday visits are least likely to be repeat visits, whereas **Business** and **VFR** trips have a higher repetition, understandably.

Only a third of **holiday** visits from China and India were repeat visits last year, whereas the figure was closer to two thirds for Germany and Australia, and 58% for France and the USA.

Business visits are the most likely to be repeated, with over 90% from Germany, Australia and France.

% Repeat visits by journey purpose



Source: International Passenger Survey 2015

Base: All visits excluding UK nationals (expats) Germany n=3,354, Australia n=1,258, France n=2,953, USA n=4,161, India n=624, China n=330

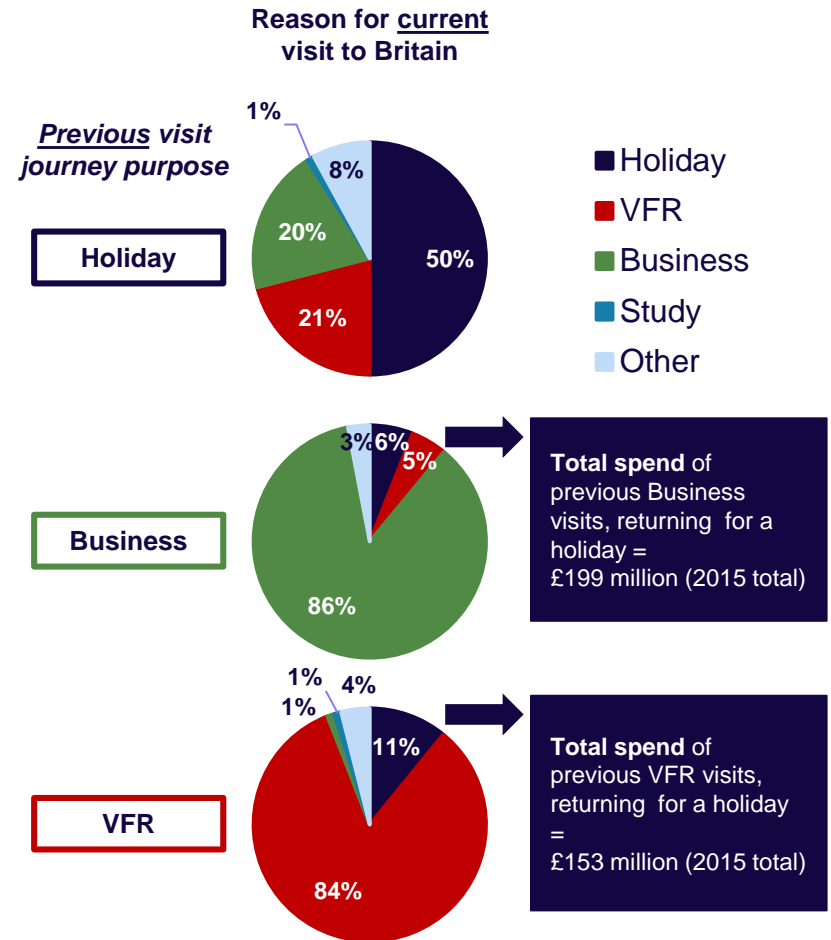
Reasons for previously visiting Britain

Amongst Repeat visitors only

Those who previously visited Britain for a **holiday**, are most likely to be taking a repeat holiday trip (50%). However, journey purpose is a bit more diverse for this group, and 20% are now visiting for business, and 21% to visit friends or relatives.

There is a large proportion of **business** travellers who have only travelled to Britain for work, and perhaps do not see Britain as a leisure destination also. The majority (86%) of repeat business visits in 2015 were for the same reason, with just 6% now visiting for a holiday, and 5% for VFR.

Previous **VFR** visits were also more likely (84%) to be repeated for the same reason. However, there is slightly more overlap with other journey purposes, as 11% of previous VFR visits were repeated for holiday. This journey purpose has the lowest overlap with business, at just 1%.

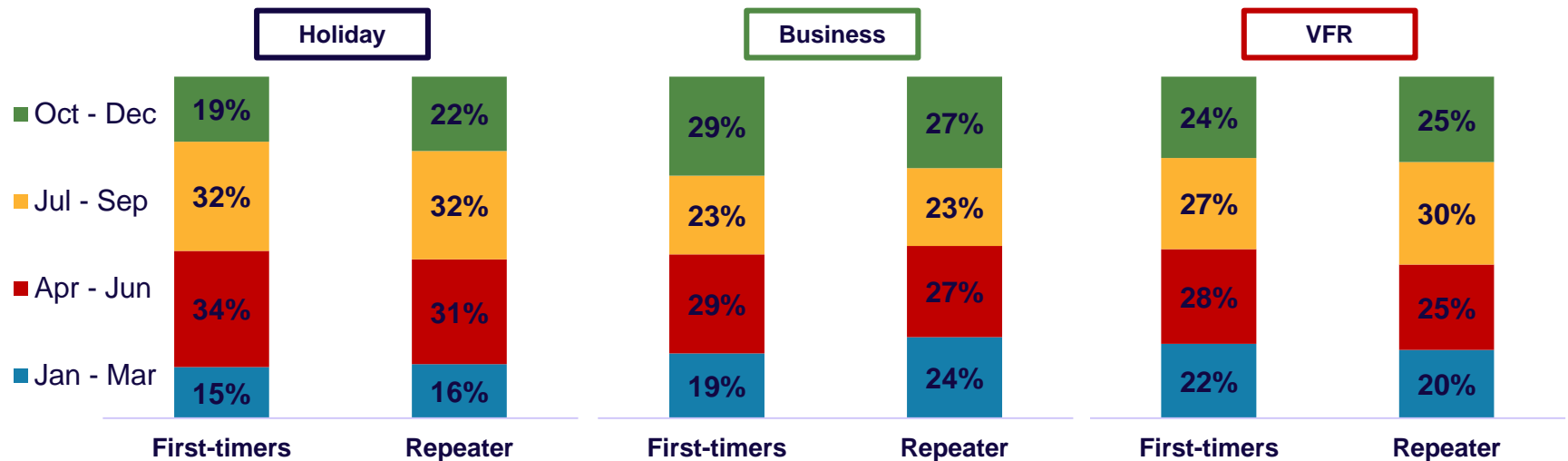


Seasonality

Visits to Britain are generally more likely to be during the warmer months of April to September, and this is especially true for **holiday** visits. First-timer holiday visits have a higher propensity to visit during this time (66% versus 63% of Holiday Repeaters). There is more seasonal spread amongst Holiday Repeaters as they are more likely to visit during the last quarter of the year than First-timers. In 2009 the story was very similar, with the seasonal spread slightly more balanced amongst Repeaters.

Business visits are spread more evenly through the seasons, however First-time Business visits are most likely to be in Q2 or Q4, whilst Repeat Business visits are more likely to occur in Q1 (24% v 19% for First-timers).

VFR visits are spread quite evenly for First-time visits, however there is a higher proportion of visits during summer (30% in July to September) amongst Repeat visits, so this is a slightly different story to Business and Holiday visits.

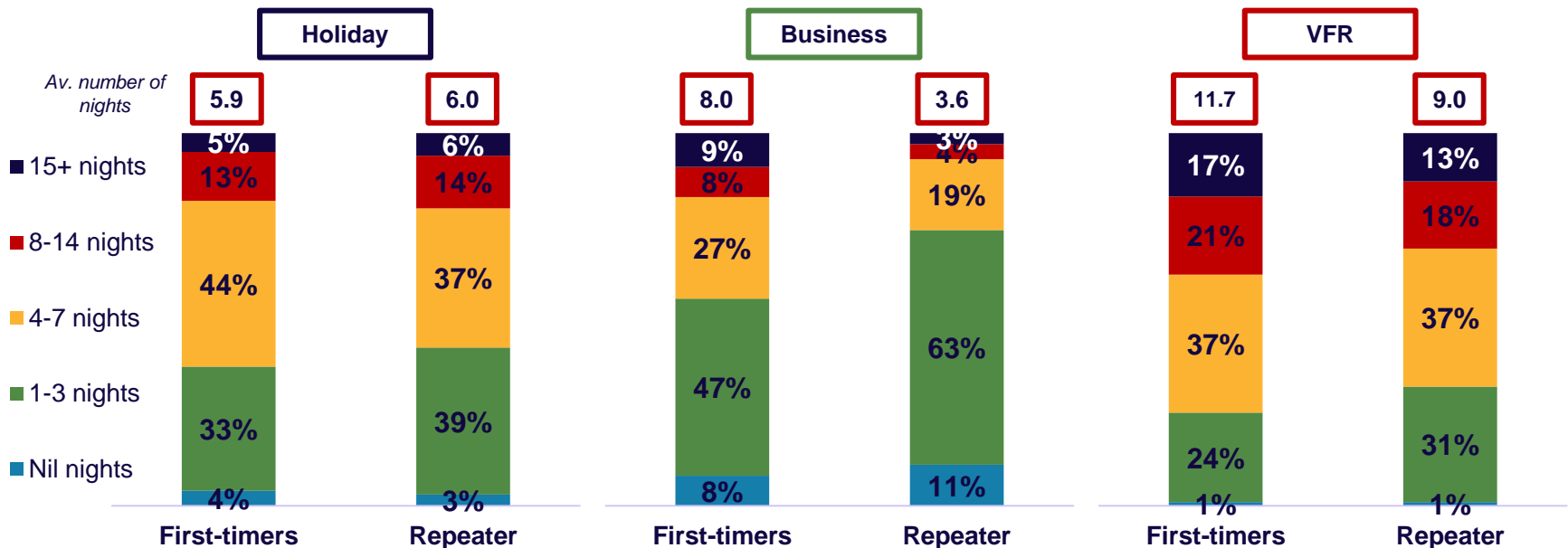


Source: International Passenger Survey 2015

Base: Visits excluding UK nationals (expats) Holiday: First Timers n=8,709, Repeaters n=4,453, Business: First-timers n=796, Repeaters n=8,334, VFR First-timers n=1,175, Repeaters n=7,322

Duration of stay

First-time **holiday** visits to Britain are more likely to last for a period between 4-7 nights, whilst Repeaters are more evenly spread between 1-3 and 4-7 nights. However, there is also a higher proportion of Repeaters who stay for longer than 8 nights, and the average length of stay for Repeat visits is slightly longer. Whilst First-time visitors are likely to stay for a traditional long weekend or week-long break, Repeat visitors seem more likely to opt for a shorter break or an extended stay in comparison. **Business** visits vary greatly in length, with First-time visits lasting on average 8 days. This contrasts with the average length of a Repeat Business visit, at 3.6 days, with the majority (63%) of these visits sitting within the 1-3 night duration. **VFR** visits are generally longer in duration too, with less than a third under 3 days. First-time VFR visits are also likely to be longer (11.7 days v 9.0 for Repeat) which reinforces the theory, that like Business trips, a First-time visit to Britain might be combined with leisure activities but repeat visits are likely to be shorter and perhaps more functional.



Source: International Passenger Survey 2015

Base: Visits excluding UK nationals (expats) Holiday: First Timers n=8,709, Repeaters n=4,453, Business: First-timers n=796, Repeaters n=8,334, VFR First-timers n=1,175, Repeaters n=7,322

Journey purpose visit frequency and value

On average, trips for **VFR** have the highest number of visits in the past 10 years, at 3.6, however the lower average spend per trip (£433) means that the 10 year value for this journey purpose is lowest at £1,553.

Business visits were most likely to be a repeated trip in 2015, and the average number of visits in the past 10 years is 3.2, making this journey purpose the most valuable, with a ten year value of £1,895.

Holiday visits were the least likely to be a repeat trip in 2015, and the average number of visits is lower at 2.7. However, due to the highest average spend per visit (£618), the ten year value of holiday visits is above that of VFR. Encouraging more holiday visits to be repeated would increase the ten year value of this journey purpose; however, could be challenging given the diverse array of holiday destinations on offer.

Journey Purpose	Proportion of repeat visitors	Average number of visits in past 10 years	Average Spend per visit 2015 (£)	Ten year value (£)
Holiday	63%	2.7	£618	£1,641
Business	92%	3.2	£588	£1,895
VFR	85%	3.6	£433	£1,553

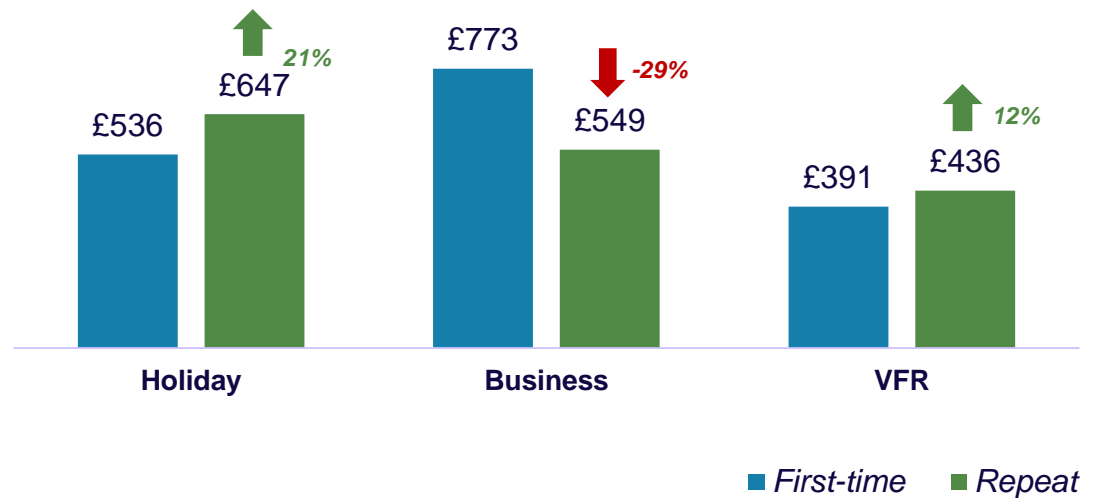
Spending habits

Repeat **holiday** and **VFR** visits are likely to be higher spend, both for the overall visit, but also on a per-night basis. On average a repeat holiday visit is worth 21%, and repeat VFR trip worth 12% more than a first-time visit.

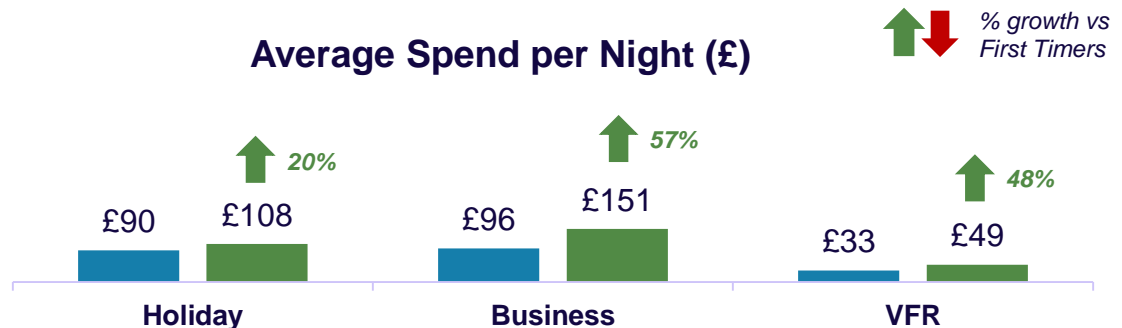
Conversely, visits for **business** are likely to be lower spend than a first-time visit. This is because they are likely to be a lot shorter in length on average, as spend per night is actually 57% higher for repeat business visits. The reduction in average length of business trips could be due to a first-time trip being treated more as a holiday, with add on days for leisure activities, whereas subsequent trips may be more functional.

The increase in average length, and average spend per night and visit for repeat holiday visits provides reason to encourage repeat visits where possible.

Average Spend per Visit (£)



Average Spend per Night (£)





Repeat visits by market

Europe

Holiday visits

Likelihood of visiting Britain multiple times is higher from our neighbouring European markets, understandably, due to greater ease and affordability of travelling to Britain.

Some of Britain's closest neighbours, including the Irish Republic, Norway and Belgium have a high proportion of repeat holiday visitors. Only 58% of visits from France in 2015 were repeat visits, meaning that the potential for attracting new visitors to Britain from France is still large, as is the potential to encourage repeat visitors.

Malta and Iceland have the highest number of average visits (5.2 and 4.7 respectively) however average spend per visit is highest for Russia at £869 per visit, well above the average for Europe.

In terms of **ten year value** Malta is Britain's most valuable market per visitor in this region, followed by Iceland, Russia, Norway and Switzerland as they each all have higher average spend per visit, as well as a higher likelihood to repeat visits.

Market	Proportion of repeat visitors	Average number of visits in past 10 years	Average Spend per visit 2015 (£)	Ten year value (£)
Irish Republic	92%	4.2	359	£1,496
Malta*	91%	5.2	612	£3,180
Iceland	83%	4.7	577	£2,712
Norway	82%	4.2	600	£2,513
Belgium	80%	3.6	341	£1,240
Sweden	79%	3.6	520	£1,862
Denmark	78%	3.8	495	£1,888
Switzerland	77%	3.5	706	£2,469
Netherlands	76%	3.8	431	£1,647
Finland	76%	3.3	579	£1,922
Russia	73%	2.9	869	£2,520
Greece	63%	2.4	527	£1,241
Spain	62%	2.6	463	£1,186
Germany	62%	2.9	481	£1,379
Austria	62%	2.6	661	£1,696
Hungary	62%	2.8	317	£885
Italy	59%	2.6	479	£1,267
France	58%	2.8	325	£921
Portugal	56%	2.3	394	£919
Poland	46%	2.5	314	£799
Romania	46%	2.4	507	£1,231
Czech Republic	43%	2.5	336	£826
Slovakia	39%	2.4	661	£1,591
EUROPE AVERAGE	67%	3.20	502	£1,626

Source: International Passenger Survey 2015

Base: Holiday visits excluding UK nationals (expats)

Ten year value calculated by average number of visits x average spend 2015

* Base size less than 50

Americas

Holiday visits

Visitors from the **USA** and **Canada** are most likely to have visited Britain before, with an average number of visits over ten years at 2.6 and 2.8 respectively.

Average spend per visit for these two markets is also high, meaning that retaining these markets as repeat visitors would be advantageous to Britain's economy.

Outside of North America, **Mexico and Brazil** have the next highest proportion of repeat visits (36% each), however average number of visits is slightly higher (1.9) from **Brazil** and spend is also higher.

Argentina has the highest average spend (£671) per visit of these three South American markets and Mexico the lowest.

When looking at the ten-year value, due to the higher propensity to repeat visit, and high average spend, USA and Canada have the largest ten-year value of the Americas.

Market	Proportion of repeat visitors	Average number of visits in past 10 years	Average Spend per visit 2015 (£)	Ten year value (£)
Canada	60%	2.8	810	£2,290
USA	58%	2.6	860	£2,207
Mexico	36%	1.6	483	£785
Brazil	36%	1.8	631	£1,166
Argentina	19%	1.5	671	£1,023
AVERAGE AMERICAS	42%	2.1	691	£1,436

Rest of World

Holiday visits

Several markets in this region have a high likelihood to make repeat visits to Britain, and also more likely to be higher spenders, compared to other markets around the globe, making them increasingly valuable to UK inbound tourism.

The highest spending markets on average, are Saudi Arabia (£3276 per visit), Kuwait (£2697) and UAE (£2275), reinforcing the potential benefit for encouraging both repeat visits from these markets, but also ensuring that new, first-time visitors are welcomed too.

Just 30% of visits from **China** were repeat, which means that over two thirds were first-time visitors to Britain, and highlighting that China is still a growing market.

In terms of ten year value, the **Gulf region** has the most valuable markets, with Kuwait, Saudi Arabia and UAE top. Kuwait has a ten year value of over £10,000, highlighting the importance of continuing to encourage both first-time and repeat visits from this market.

Market	Proportion of repeat visitors	Average number of visits in past 10 years	Average Spend per visit 2015 (£)	Sustain Score (Ten year value £)
Qatar*	95%	3.4	£2,367	£8,039
Kuwait	88%	3.9	£2,697	£10,464
South Africa	84%	3.6	£1,176	£4,269
Nigeria	83%	5.2	£1,249	£6,520
Saudi Arabia	80%	2.9	£3,276	£9,662
Israel	78%	3.4	£781	£2,682
United Arab Emirates	76%	3.4	£2,275	£7,655
Turkey	74%	3.2	£745	£2,373
Australia	62%	2.8	£1,068	£3,007
Thailand*	60%	2.1	£1,900	£3,943
New Zealand	56%	2.3	£885	£2,035
Hong Kong	52%	2.8	£1,189	£3,322
Japan	49%	2.0	£925	£1,857
Singapore	48%	2.5	£1,385	£3,422
Malaysia	48%	2.2	£935	£2,014
India	33%	2.1	£485	£1,001
Taiwan*	31%	1.7	£751	£1,252
China	30%	1.6	£1,711	£2,676
South Korea	21%	1.3	£368	£490
AVERAGE ROW	60%	2.8	£1,377	£3,791

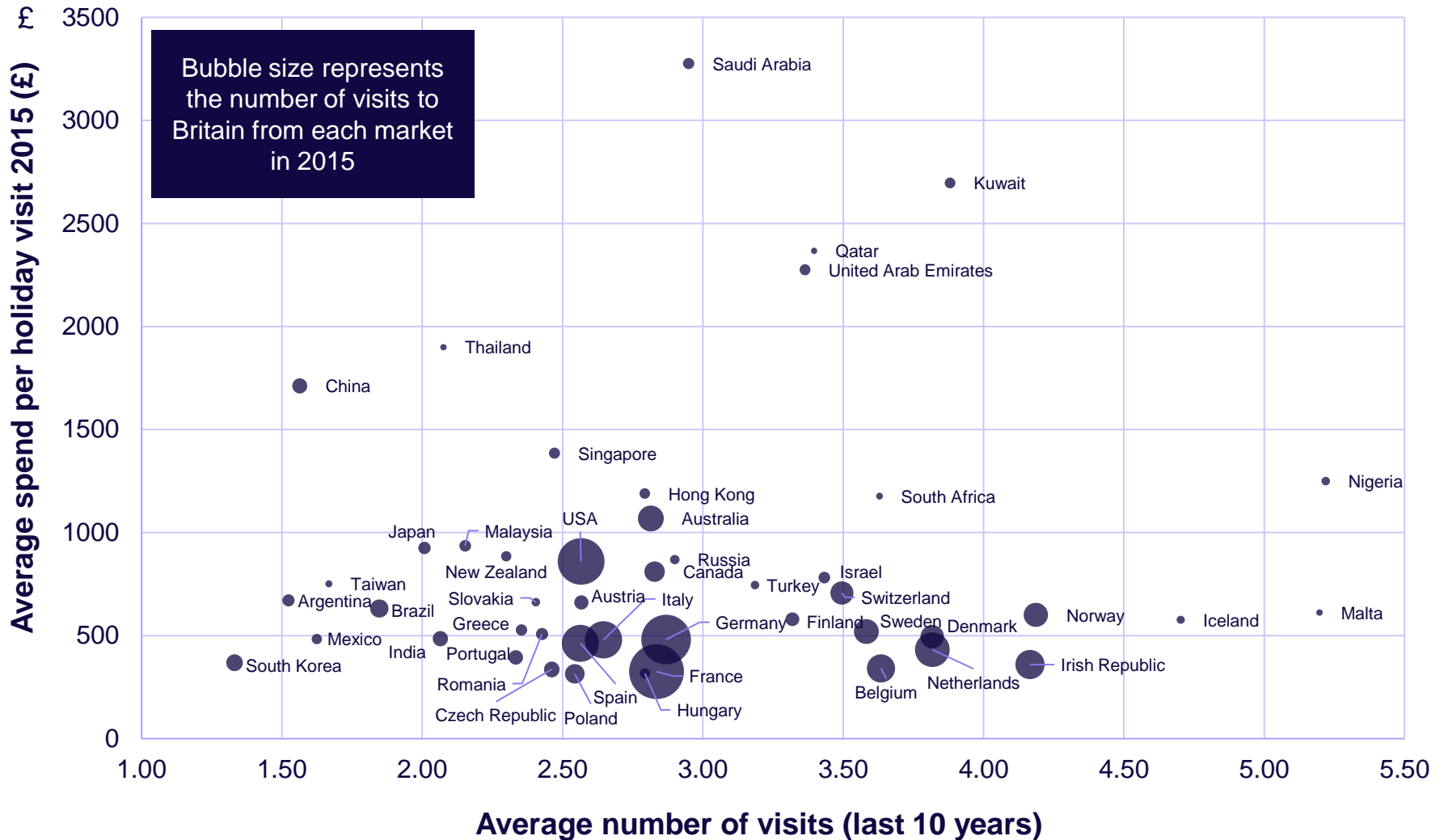
* Base size less than 50

Source: International Passenger Survey 2015

Base: Holiday visits excluding UK nationals (expats)

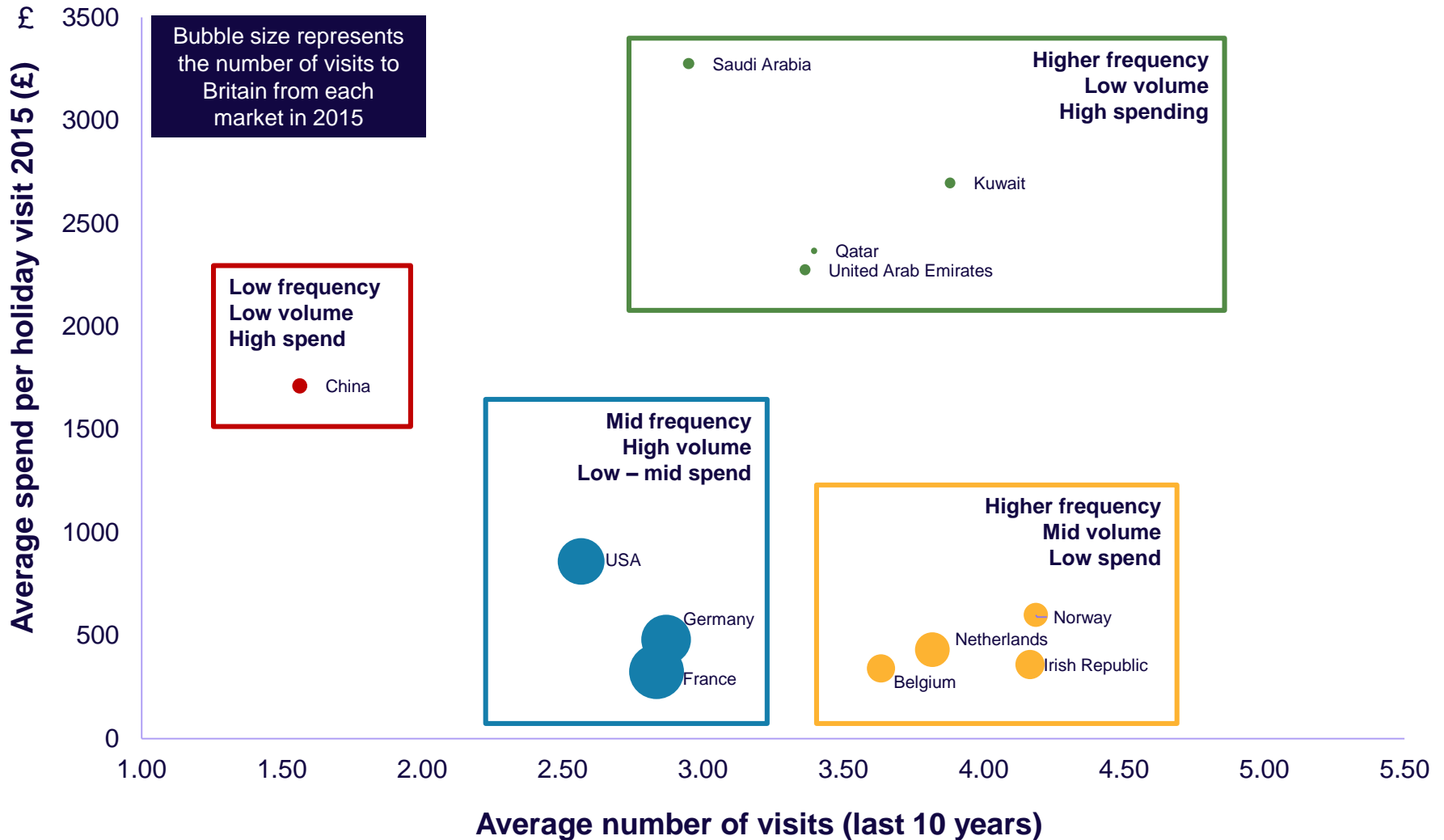
Ten year value calculated by average number of visits x average spend 2015

Average visits by spend with market sizing



Source: International Passenger Survey 2015
 Base: Holiday visits excluding UK nationals (expats)

Average visits by spend with market sizing



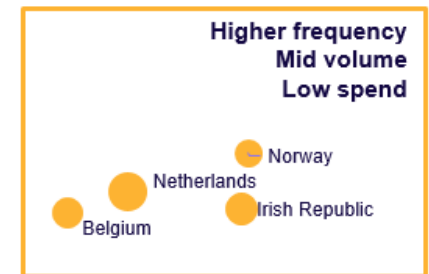
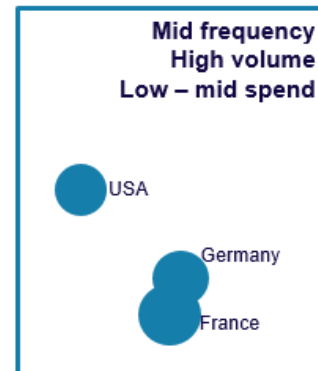
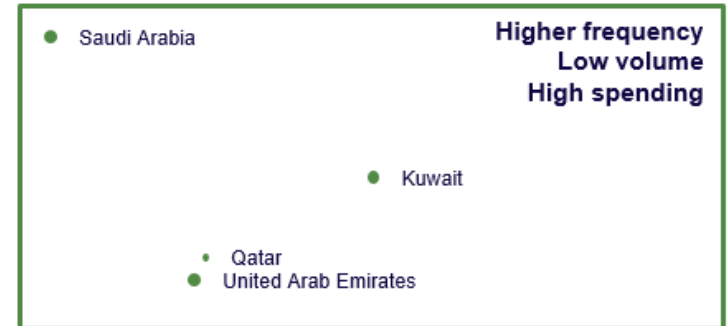
Source: International Passenger Survey 2015
 Base: Holiday visits excluding UK nationals (expats)

Average visits by spend with market sizing

The Gulf provides Britain with several **high spending markets** (Saudi Arabia, Kuwait, Qatar and UAE). These markets are also interesting because they have a high frequency of repeat visits as well. Whilst these markets are valuable in terms of spend and frequency, the volume of visits is a lot lower, so increasing visitor numbers would be valuable in these markets.

Our **largest markets for visits** are Germany, France, and the USA. Whilst providing a large volume of visitors to Britain, they have just a medium average visit frequency. The USA is higher spending than Germany and France, though with a lower frequency of visit.

We have several **close proximity markets** with a high frequency of travel to Britain; Irish Republic, Norway and Netherlands to name a few. Whilst these markets are visiting Britain frequently, they have a lower volume, which is influenced by smaller populations than some of our bigger markets such as France and Germany. These markets are all fairly low spend when compared to the USA or Gulf markets for example.





Repeat visits by UK region

UK regional repeat visits

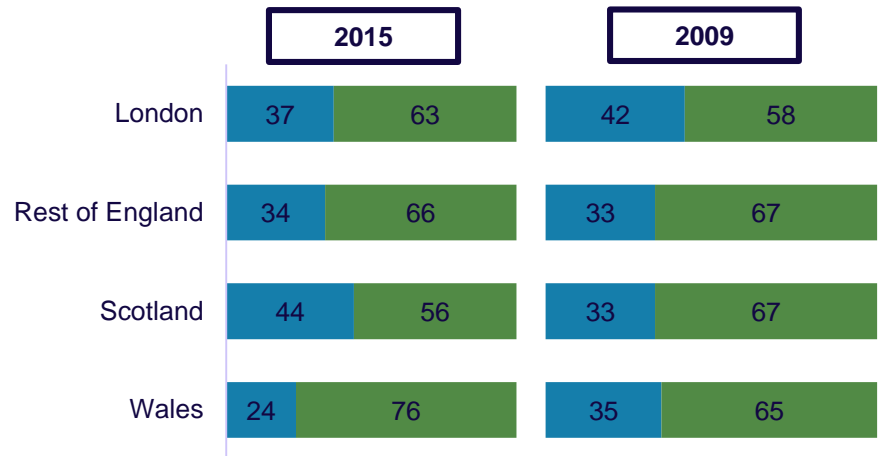
Holiday visits

Here we look at the spread of first time and repeat visitors to Britain's nations and regions. This analysis looks at where visitors stay overnight, among those visiting one region only.

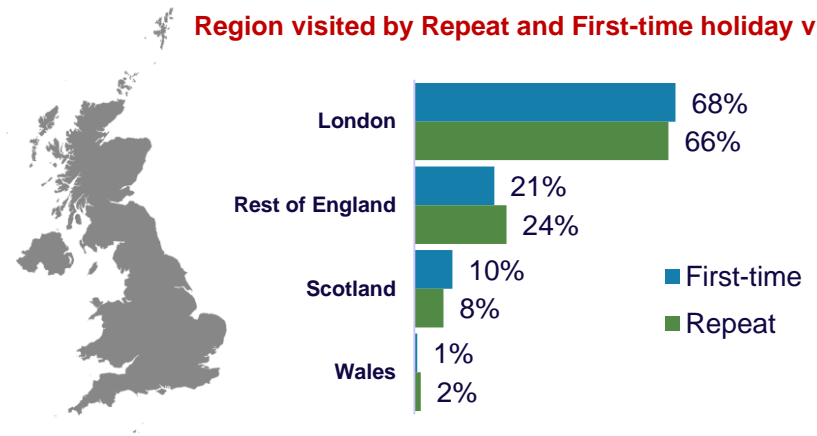
In 2015, **Scotland** had the lowest proportion of repeat holiday visits (56%) of British regions, which has decreased since 2009 when this question was last asked. This suggests that holiday trippers are increasingly more likely to choose Scotland for a first-trip to Britain than previously. 10% of first-time visits were to Scotland.

The proportion of repeat visitors amongst those staying in **London** has increased from 58% to 63%, indicating that it is becoming a destination to be included on subsequent trips to Britain as well as first-time trips. Two thirds (66%) of visits to the **Rest of England** were repeat UK visits, and three quarters (76%) of those in **Wales**. This is consistent with the idea that these areas are more likely to be visited on subsequent trips to Britain. 24% of Repeat visits included Rest of England, whilst on 21% of First-time visits. This reinforces the notion that visitors are more likely to take a look beyond London on subsequent visits to Britain, but that Scotland is also a growing destination in its own right.

% of Repeat and First-time visits by region



Region visited by Repeat and First-time holiday visits



Source: International Passenger Survey 2015

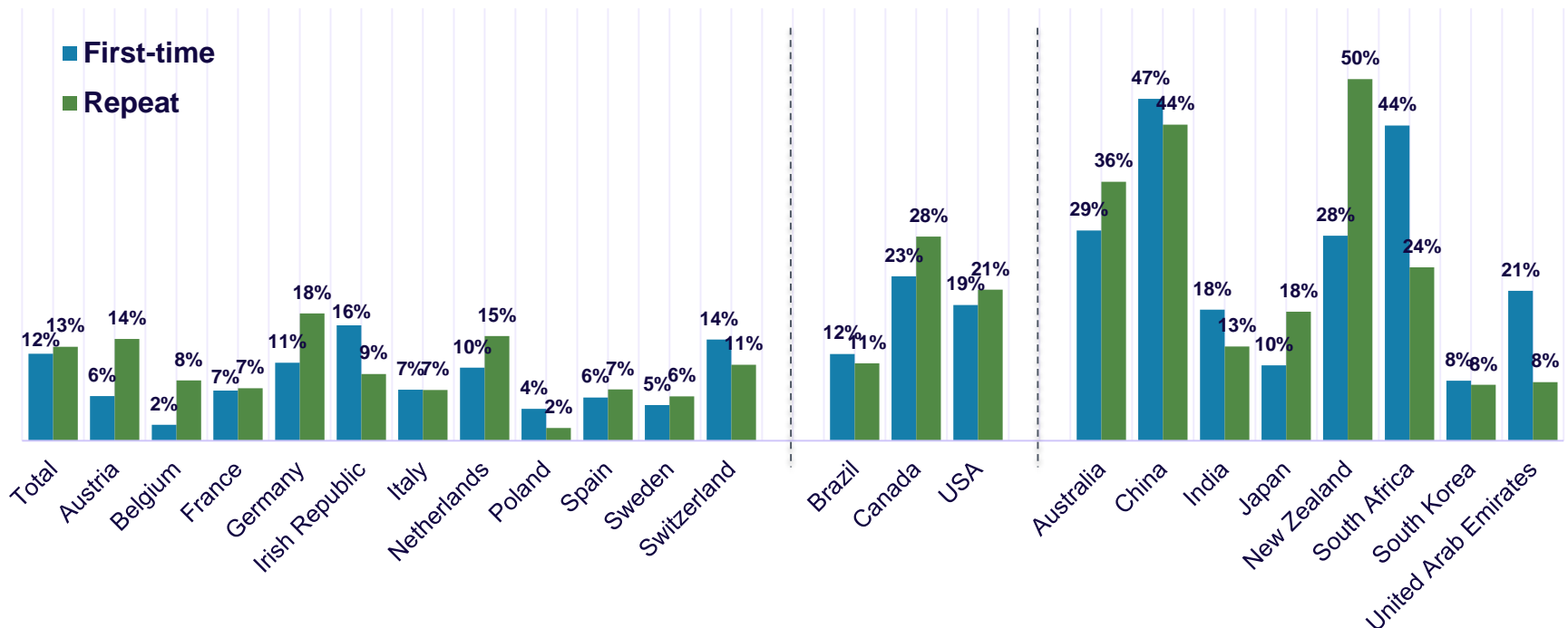
Base: Holiday visits to one destination only excluding UK nationals (expats) London n=7,489, Rest of England n=2,256, Scotland n=845, Wales n=123

Multiple region visits by market

Holiday visits

On average, those on a repeat holiday visit to the UK in 2015 were slightly more likely to stay in multiple regions of the UK, compared to first-time visitors, although this varies by market. Half of repeat visitors from New Zealand visited more than one region on their holiday in 2015, compared to just 28% of first-time visitors. Repeat visitors from Australia, Japan, Canada, USA, Austria, Germany and the Netherlands are also more likely to visit multiple regions than first-time visitors.

% who stayed in more than one region on their trip



Source: International Passenger Survey 2015
 Base: Holiday visits excluding UK nationals (expats)

Appendix

It is possible to find more detail about all of VisitBritain's priority markets, including the latest quarterly data from the International Passenger Survey, by exploring the Insights & Statistics pages of our website.

In addition to being able to manipulate data through a series of visualisations our Market and Trade Profiles provide a comprehensive summary of each market including trends, attitudes and characteristics.

The data source for all charts and tables is the **International Passenger Survey**, conducted by the **Office for National Statistics**.

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