

Researching and Planning

Foresight – issue 150

VisitBritain Research

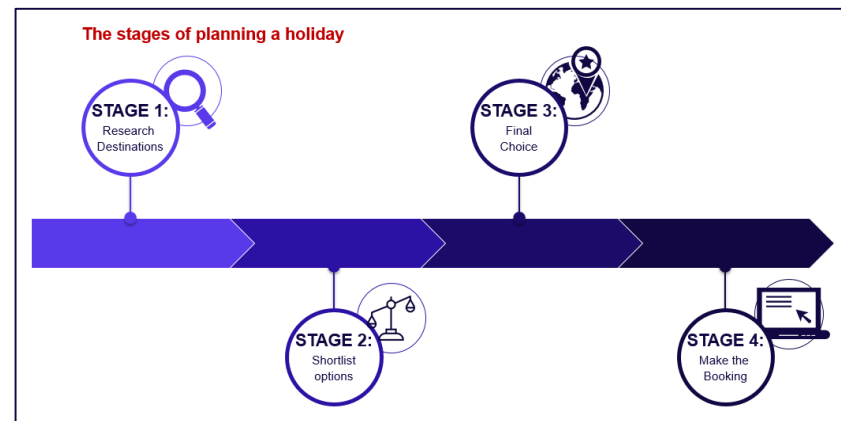


Contents

- 1. Introduction**
- 2. Summary**
- 3. Roles within the planning process**
- 4. Length of the planning process**
- 5. Key influences for choosing a holiday destination**
- 6. Reasons for choosing Britain**
- 7. Motivators for visiting Britain – International Passenger Survey**

Introduction

- This edition of Foresight explores in depth the different behaviours and attitudes surrounding the stages of research and planning for a holiday.
- This analysis comes from a research study carried out by VisitBritain and research agency Ipsos in spring 2016. International travellers from 20 different markets were interviewed, and are either previous visitors to Britain, or would consider visiting in the future.
- International travellers who were residents of the following markets were surveyed: Australia, Brazil, Canada, China, Denmark, France, Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, Saudi Arabia, South Korea, Spain, Sweden, UAE & USA.
- The study explored the four key stages when planning a holiday: **Researching**, **Shortlisting**, **Final Choice** and **Booking**. In this report we will be focussing primarily on the first three stages of the planning process. Booking behaviour will be covered in more depth within another Foresight report.
- For added context, an additional question from the International Passenger Survey have been included to give a greater insight into reasons why visitors chose to visit Britain in 2015. The IPS interviews visitors to the UK at the end of their trip, at the point of departure.



Summary (1/2)

- **The roles within the planning process:**
 - Shortlisting of destinations, and making the final choice are more often a joint activity, whilst researching and booking are most likely to be done by the individual.
 - Men are more likely than women to make the final choice and to book the holiday in Japan, USA, Gulf, India and Russia.
 - European markets are more gender equal in the booking journey, with the decision making and booking equally divided between men and women.
- **The length of the planning process:**
 - Over half started to think about their trip to Britain six months in advance; however, this varies greatly by market.
 - In Australia and New Zealand, more than 70% of those taking a foreign trip start thinking more than 6 months in advance and over half will have booked by 3 months prior to the trip.
 - In China, a high proportion book less than a month in advance, and almost half made their destination decision just two months prior to travel or less.
 - In Europe, German travellers are most likely to plan ahead, with over half starting to think about their trip 6 months or more prior, and most booking at least three months in advance.
 - Other European markets vary but many will be looking at the different options for their chosen destination between 3-6 months prior to travel.
 - Sweden, Italy, Spain and the Netherlands are latest to book within European markets, and over half book with two months to go or less.

Summary (2/2)

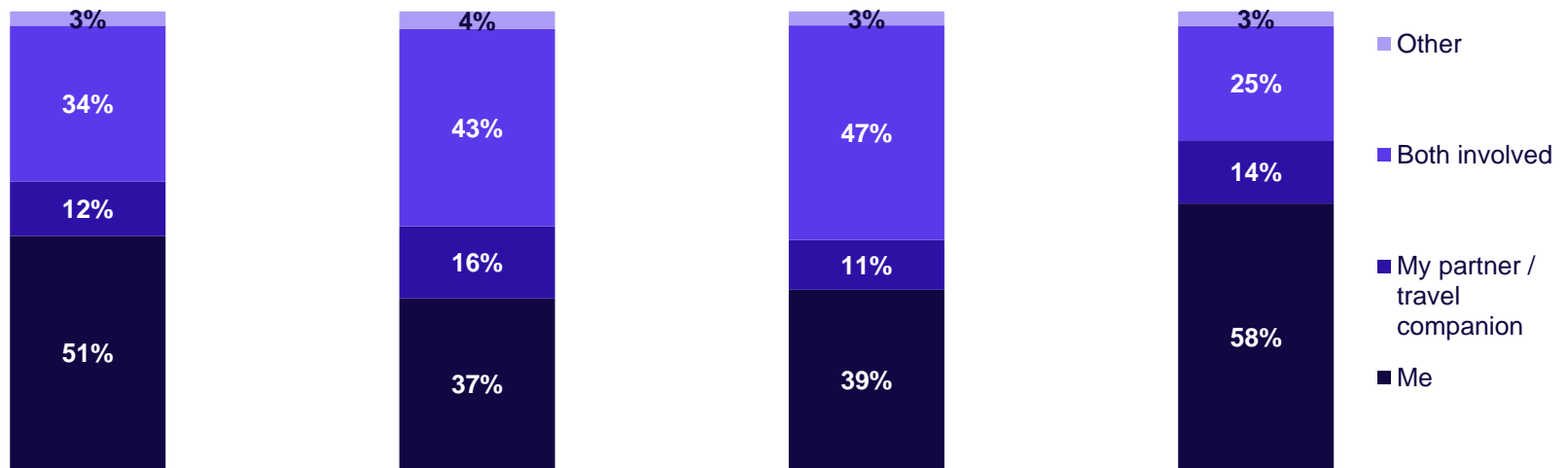
- **Key influences for choosing a holiday destination:**
 - The biggest influence when choosing a holiday destination is word of mouth; however, online influences are strong with search engines, price comparison sites and traveller review sites used by around a third each.
 - Travel guidebooks are more likely to be used in Japan and South Korea, and travel agents are influential in both these markets, as well as China.
 - Hotel websites are a sources of information for Russia and USA, whilst blogs and forums have higher usage in Spain.
 - Countries in the Nordic regions are more likely to say that they only use online sources.
- **Reasons for choosing Britain:**
 - Visitors to Britain were likely to have been convinced by the cultural attractions, followed by the variety and wanting to go somewhere new.
 - Considerers are also attracted to Britain's cultural attractions, but deals are also a strong driver for a third, which could indicate that they are waiting for a good deal to arrange a trip.
 - The UK's climate is a key reason for Saudi Arabia, UAE and India to visit Britain, culture is more important for Brazilians and the potential to visit friends and family is a draw for Australia and New Zealand travellers.
 - In the 2015 International Passenger Survey, over a third cited the UK's heritage and history as a key reason why they chose to visit for a holiday in 2015. Culture is the next most likely reason, followed closely by the chance to see world famous places, all of which are closely linked to the above and make Britain such a strong tourism offer.



3. Roles within the planning process

Responsibility during the planning process

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



Research 

Shortlist 

Final Choice 

Booking 

Responsibility during the planning process

Market breakdown



	AUS	BRA	CAN	CHI	IND	JAP	NZ	RUS	SAU	KOR	UAE	USA	DEN	FRA	GER	ITA	NET	NOR	SPA	SWE
Research potential destinations																				
I do	57%	70%	61%	54%	59%	64%	51%	40%	48%	42%	46%	65%	42%	52%	48%	50%	44%	40%	43%	43%
Both involved	34%	19%	30%	22%	22%	22%	41%	41%	29%	30%	31%	23%	50%	32%	41%	30%	40%	47%	46%	47%
Shortlist options																				
I do	48%	49%	47%	42%	38%	56%	37%	29%	33%	37%	22%	47%	30%	38%	36%	39%	37%	19%	27%	26%
Both involved	43%	28%	40%	27%	30%	26%	52%	47%	32%	35%	40%	31%	60%	44%	50%	38%	47%	63%	59%	61%
Make final choice																				
I do	46%	60%	42%	54%	50%	64%	34%	40%	41%	47%	31%	53%	17%	33%	33%	36%	30%	22%	28%	22%
Both involved	47%	26%	46%	26%	30%	22%	58%	44%	33%	30%	42%	36%	76%	52%	57%	46%	59%	67%	63%	70%
Make the booking																				
I do	61%	68%	67%	60%	59%	73%	57%	56%	45%	53%	40%	62%	53%	56%	60%	57%	49%	57%	58%	55%
Both involved	28%	16%	21%	16%	18%	13%	30%	29%	21%	23%	22%	19%	35%	28%	27%	25%	34%	29%	30%	30%

Source: IPSOS/Visit Britain. QR1: Who is most likely to do the following when it comes to your holidays?

Base: All Respondents (11,400), 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)

Responsibilities at choice and booking stages

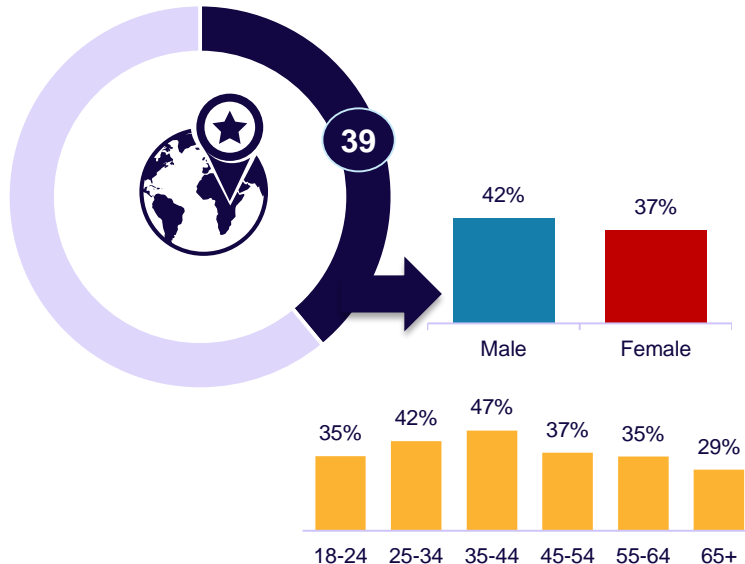
Age and Gender breakdown

Looking at these stages by demographics, finalising a holiday (final choice or booking) is more likely to be carried out by men. Those aged 25-44 are more likely to say that they make the final decision solely; however, making the booking varies less with age.

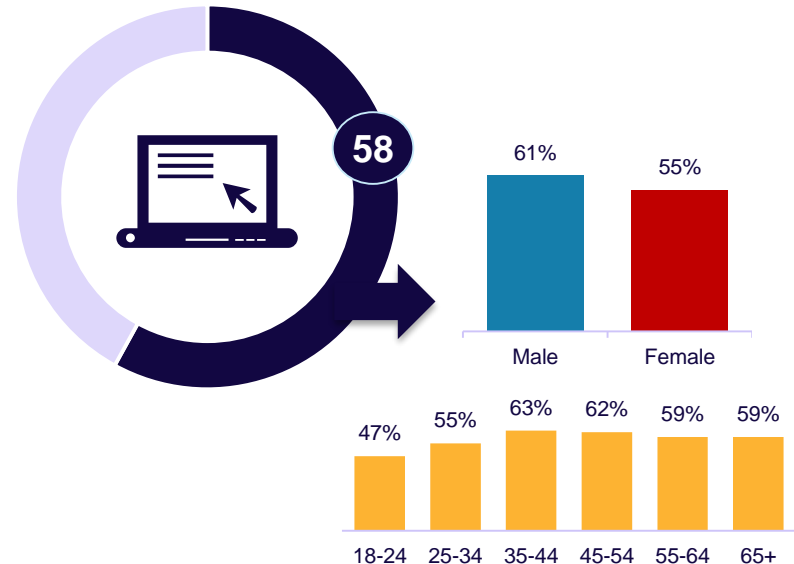
% who say they are responsible solely for making the final choice and making the booking

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

Make the final choice



Make the Booking

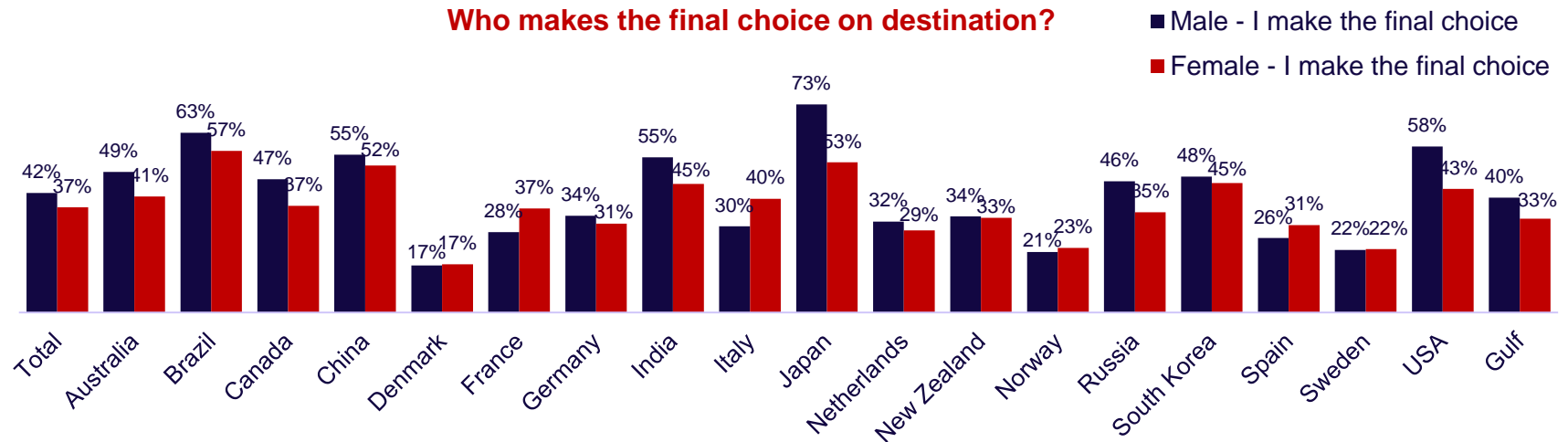


Responsibility for final choice of destination

Gender market breakdown

European countries have a generally even balance of men and women saying that they make the final choice on destination. In France, Spain, Italy and Norway women are more likely to make the final choice, whereas Denmark, Germany, Netherlands and Sweden there is an even gender balance or a slight skew towards men making the final decision.

Markets where men are more likely to say they make the final choice on destination are Japan (73%), USA (58%), Canada (47%), India (55%) and Russia (46%).



Source: IPSOS/Visit Britain. QR1: Who is most likely to do the following when it comes to your holidays?

Base: All Respondents (11,400), 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. Length of planning process

How long is the planning process?

Almost half (49%) start thinking about their trip to Britain more than 6 months in advance of taking it.

The decision on destination is likely to be made between 3 and 6 months for 38% and more than 6 months in advance for 32%.

Booking lead time varies; 32% booked their trip 3-6 months in advance, 28% booked 1-2 months in advance, and 21% booked less than a month in advance.

This question was also asked to Considerers, who have not been to Britain before, about their last trip abroad. At the global level, planning process timings do not differ significantly between trips to Britain and to other destinations, although there are differences by market.

How far in advance did you do the following?

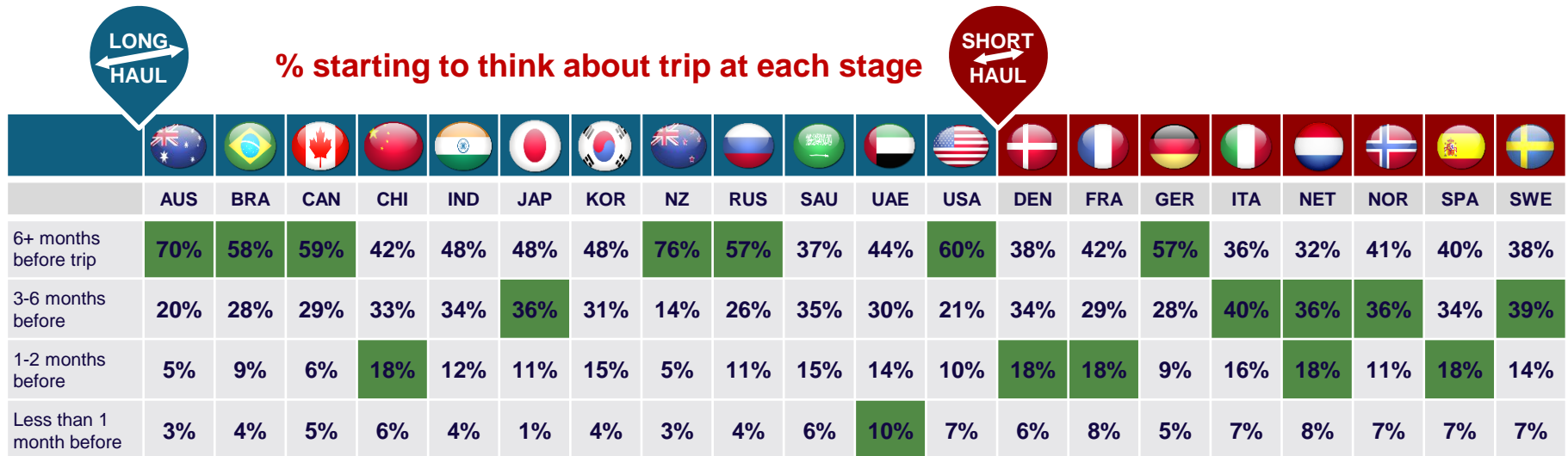
■ More than 6 months
 ■ 3 - 6 months
 ■ 1-2 months
■ Less than 1 month
 ■ Don't know



When do people start thinking about their trip?

Travellers from New Zealand and Australia are most likely to start thinking about their trip to Britain more than 6 months in advance, whereas China, Japan and UAE are more likely to do so 3-6 months in advance.

Although some short haul markets also start thinking about their trip as early, they are more likely to do so 3-6 months prior. The longest planning journey is from visitors from Germany, 57% of whom start thinking about their trip 6+ months in advance.



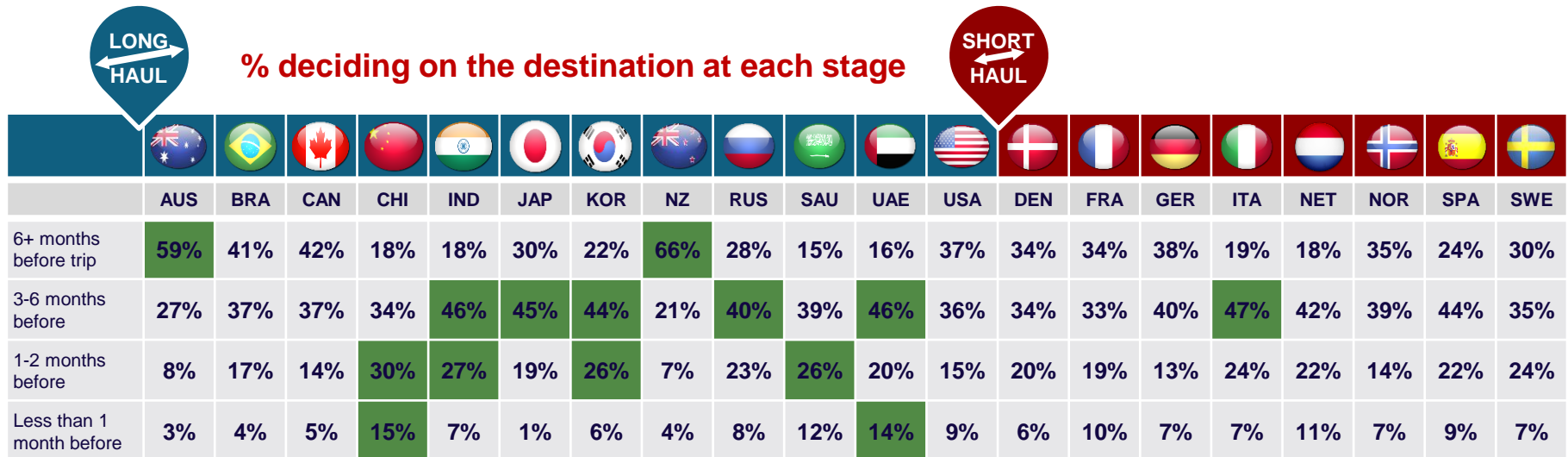
QR5: Thinking about your holiday to Britain, how far in advance did you start thinking about the trip?

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)

When do people decide on the destination?

Long haul markets vary widely. Most in New Zealand and Australia decide on the final destination more than 6 months in advance, whilst Russia, India, Japan and Korea are more likely to decide 3-6 months before travelling. Chinese travellers have a shorter lead-in, with 45% deciding on the destination with 2 months to go or less.

Among short haul markets, 3-6 months is the most likely decision lead time.



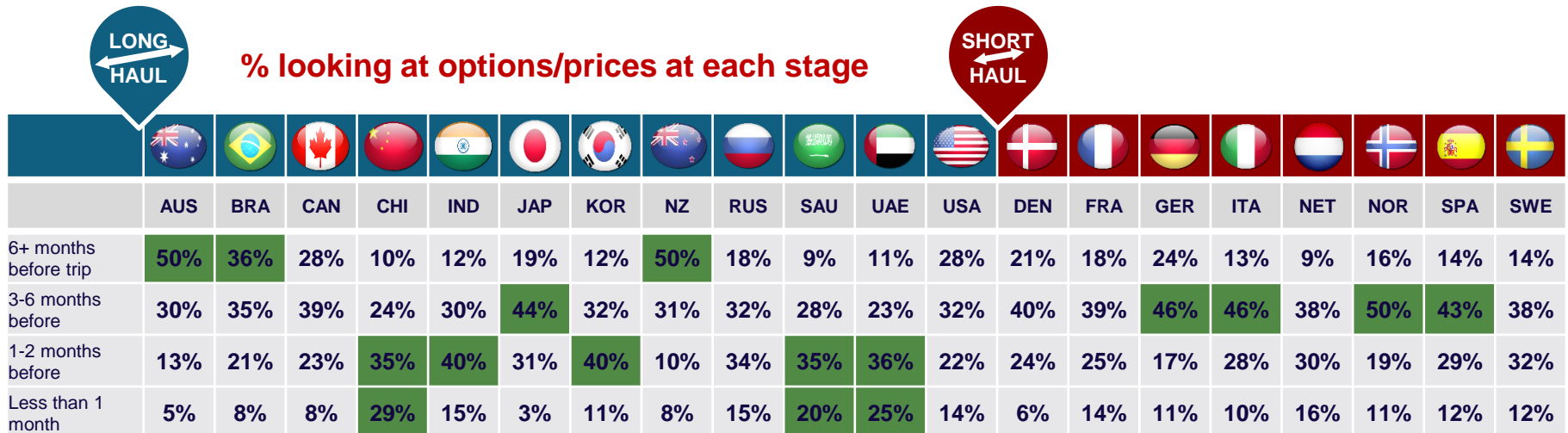
QR5: Thinking about your holiday to Britain, how far in advance did you start thinking about the trip?

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)

When do people look at prices and options?

Looking at long haul, Australia and New Zealand have the longest lead in time, due to their distance from other countries, with over half doing their research more than 6 months in advance. India and South Korea are most likely to look at prices and options 1-2 months in advance, with 29% in China taking a look only a few weeks before. Saudi Arabia and UAE also have short lead-in times, with 20% and 25% respectively doing their research in the month preceding travel.

Among short haul markets, many are researching 3-6 months in advance, though around 45% in Netherlands and Sweden do this just 2 months before or less.



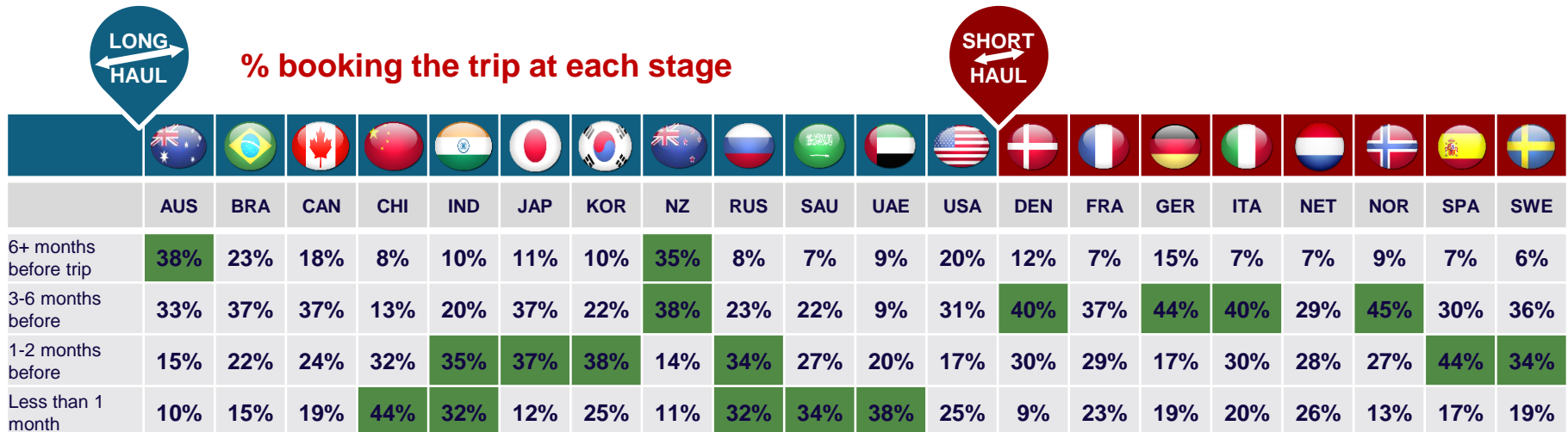
QR5: Thinking about your holiday to Britain, how far in advance did you start thinking about the trip?

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)

How far in advance do people book their trip?

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, visitors from Germany tends to book their trip much earlier, with over half (59%) preferring to book at least 3 months before travelling. Markets such as France, Spain, Sweden and Netherlands are more likely to book travel within 2 months of their trip.



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)

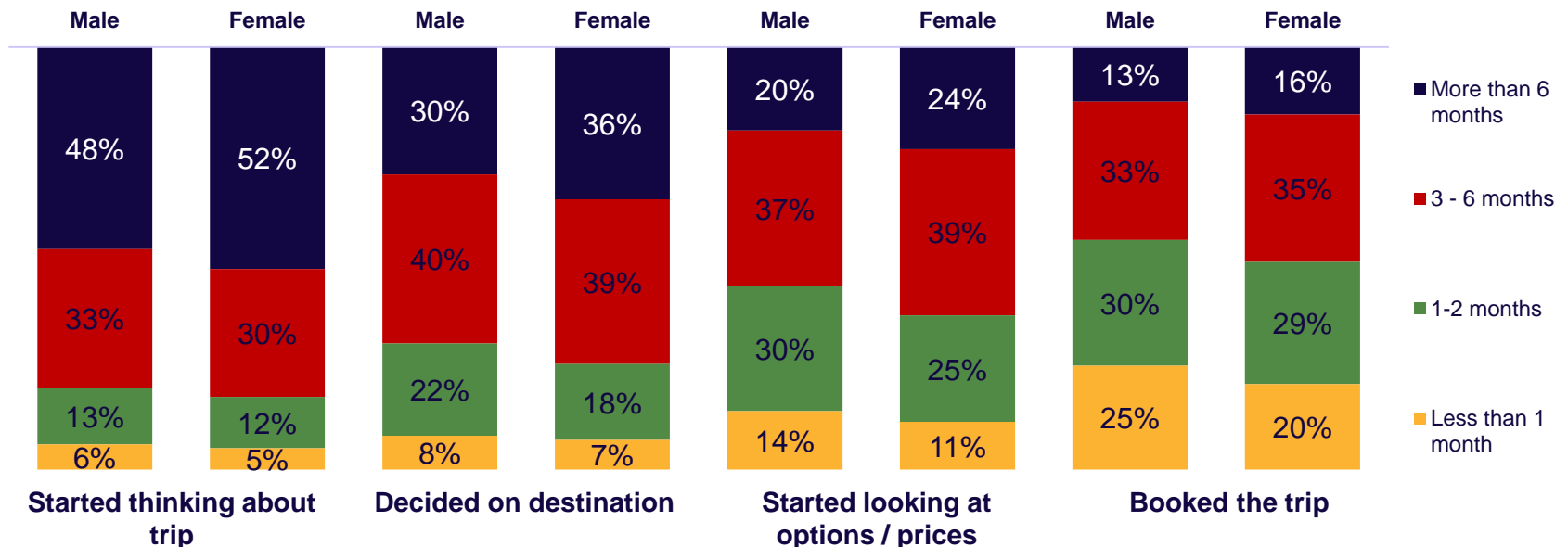
The planning process, by gender

Women are slightly more likely to plan ahead and have the destination decided longer in advance compared to men. 75% of women have decided on the destination 3 months before travelling, compared to 70% of men.

Women are also more likely to start looking at options and costs longer in advance (63% do this 3 months beforehand, compared to 57% of men).

A higher proportion of men would leave booking until later, with 25% booking their trip with less than a month to go.

How far in advance did you do the following?



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

Base: Visitors: Male (2,880), Female (2,820)

The planning process, by age

Over half (55%) of those aged 18-24 are more likely to start thinking about taking a trip more than 6 months in advance, higher than most other age groups apart from those aged over 65.

The decision on destination does not have a strong link to age, although those aged 65+ are more likely to decide furthest in advance.

When it comes to looking at options and prices, and then booking the trip, younger travellers are more likely to do this closer to the trip (within 2 months of travelling). Meanwhile, their older counterparts are more likely to do these steps more than 3 months in advance.

How far in advance did you do the following?

	Started thinking about trip						Decided on destination						Started looking at options / prices						Booked the trip					
Age	18-24	25-34	35-44	45-54	55-64	65+	18-24	25-34	35-44	45-54	55-64	65+	18-24	25-34	35-44	45-54	55-64	65+	18-24	25-34	35-44	45-54	55-64	65+
More than 6 months	55%	50%	48%	48%	51%	55%	33%	29%	30%	33%	38%	45%	21%	19%	20%	21%	28%	29%	14%	13%	13%	12%	18%	18%
3-6 months before	27%	31%	33%	33%	34%	29%	38%	43%	39%	40%	37%	34%	33%	38%	35%	40%	37%	44%	30%	31%	29%	38%	35%	44%
1-2 months before	13%	14%	14%	13%	10%	12%	21%	21%	23%	19%	18%	16%	32%	30%	30%	26%	27%	19%	29%	30%	32%	30%	29%	24%
Less than 1 month	6%	6%	5%	6%	5%	4%	8%	8%	8%	8%	6%	5%	14%	13%	14%	13%	9%	8%	28%	26%	25%	20%	19%	13%

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

Base: Visitors: 18-24 (511), 25-34 (1,776), 35-44 (1,165), 45-54 (898), 55-64 (728), 65+ (622)

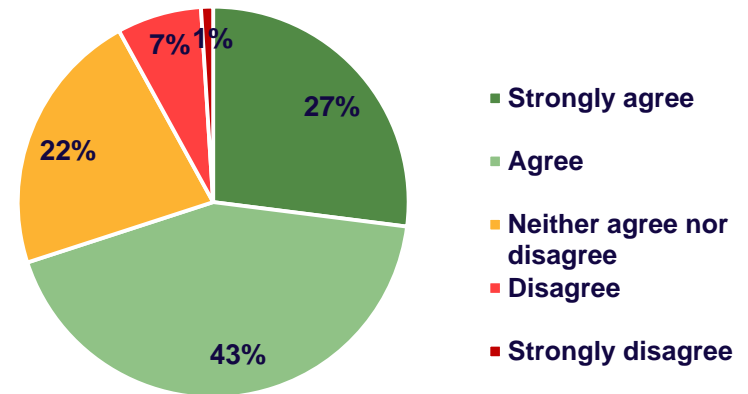
Planning carefully versus being spontaneous

Over a quarter strongly agree that they like planning their trip carefully before leaving. A further 43% also agree that they like to plan carefully.

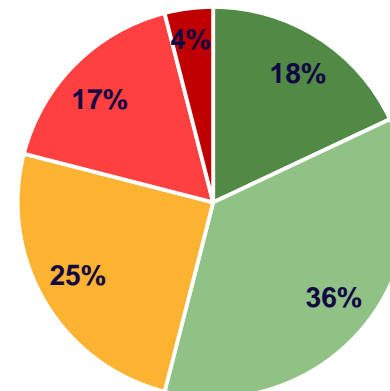
However, there is scope to organise and plan many things in advance but still leave a few things to chance and spontaneity on the trip itself. Over half (54%) say that they like to be spontaneous on holiday and leave some elements of planning to the last minute.

This approach is slightly less popular than the thoroughly planned method however, as 21% disagree on leaving some elements to spontaneity. This contrasts with the mere 8% of travellers who disagree with planning a holiday carefully in advance.

I like to plan my holiday carefully before I leave



I like to be spontaneous on holiday and decide on some of my itinerary at the last minute



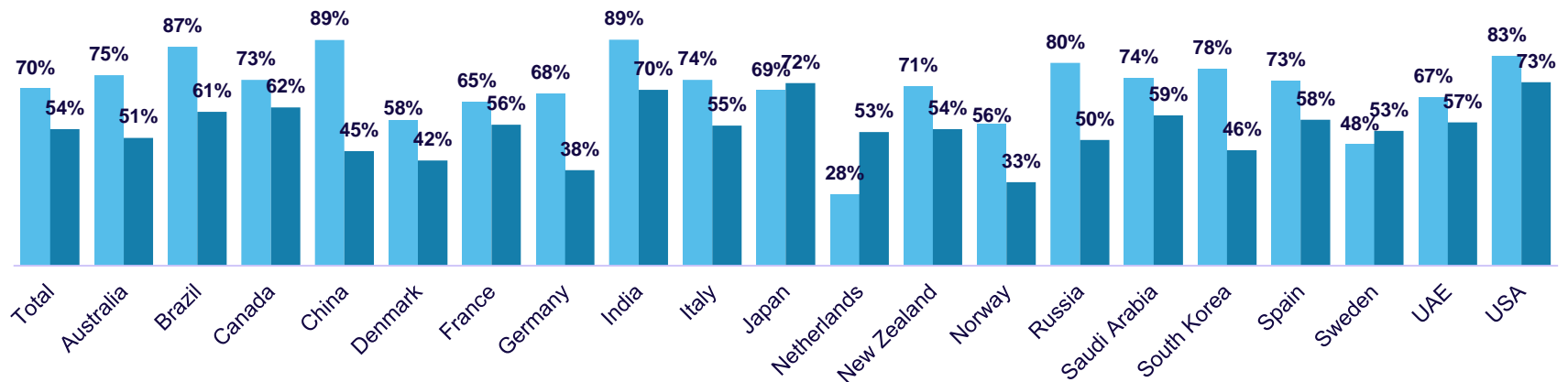
Planning carefully versus being spontaneous

Market breakdown

In some markets, planning carefully is preferred over leaving elements to spontaneity. This is evident most strongly in **China**, where 89% would prefer to plan, whilst just 45% leave trip elements to the last minute. **Russia, Germany** and **South Korea** are also markets where there is the widest gap between planning and spontaneity.

Whilst the majority of travellers are more likely to prefer planning, in the **Netherlands** and **Sweden**, a higher proportion prefer to leave elements to the last minute rather than plan too carefully.

- I like to plan my holiday carefully before I leave (% Strongly agree and agree)
- I like to be spontaneous on holiday and decide on some of my itinerary at the last minute (% Strongly agree and agree)



Source: QR8. To what extent do you agree with the following statements? 'I like to plan my holiday carefully before I leave' and 'I like to be spontaneous on holiday and decide on some of my itinerary at the last minute'.

Base: Total (11,400), 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)



5. Key influences for choosing a holiday destination

Key online and offline influences

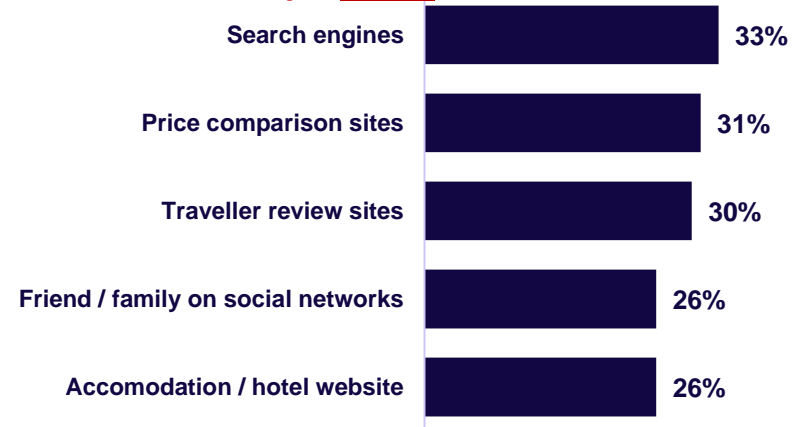
Globally, the biggest influence on destination choice is word of mouth, with talking to friends and family key for 40% of visitors and considerers. However, online influences are strong, with search engines used by a third (33%) and price comparison sites and traveller review sites used by 31% and 30%. Social networks are an important influence for one in four (26%).

Traditional methods of influence such as guidebooks and brochures are still used; 25% say a travel guidebook is a key influence, 18% tour operator brochures and 17% official brochures for the country or city they are visiting.

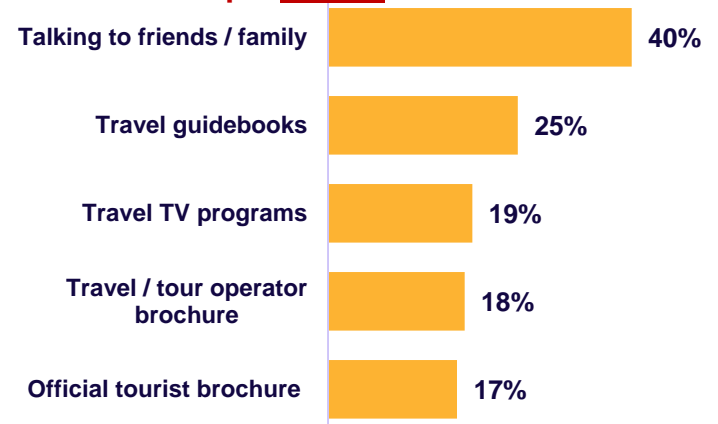
The differences between influences to visit Britain and to visit elsewhere are generally small, although visitors to Britain are more likely to say that travel guidebooks and TV adverts influenced their decision and less likely to be influenced by a travel agent or tour operator website.

There are some key differences by market, which are detailed in the next few slides.

Top 5 online influences



Top 5 offline influences



QR2 & 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?

Base: All Respondents (11,400), 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)

Influences by age and gender



Whilst talking to friends, family or colleagues is the biggest influence across all age groups and for both men and women, there are some key differences to be noted among these subgroups.

Below and to the right are where the influences differ. For example the younger age group are driven more by online price offers and images and videos online, the middle age group like travel blogs and those aged 55-64 are greater users of travel agent websites.

Men are more likely than women to use a **travel guidebook (27%)** or a **travel app (15%)** and less likely to use **traveller review websites (28%)** than women.

Women are slightly more likely than men to **talk to friends or family (42%)** but less likely to use a **travel guidebook (23%)** or a **travel app (12%)**.

Please see the following slide for the full age and gender breakdowns for the online and offline influences.

Those aged **18-24** are more likely than older age groups to be influenced by a **special offer or price advertised online (24%)** and also by **images or videos shared online (20%)** and **travel features in newspaper or magazine (20%)**.

Those aged **25-54** are more likely than other age groups to be influenced by **travel blogs or forums (27%)**.
25-34s are more likely to be influenced by **images or videos shared online (19%)**.
35-44s are also influenced by **travel guidebooks (28%)**.

Those aged **55-64** are more likely than other age groups to be influenced by **travel agents or tour operator websites (27%)**.

65+ year olds are more likely to say they were **not influenced by any online (30%) or offline (32%) sources** than those younger.

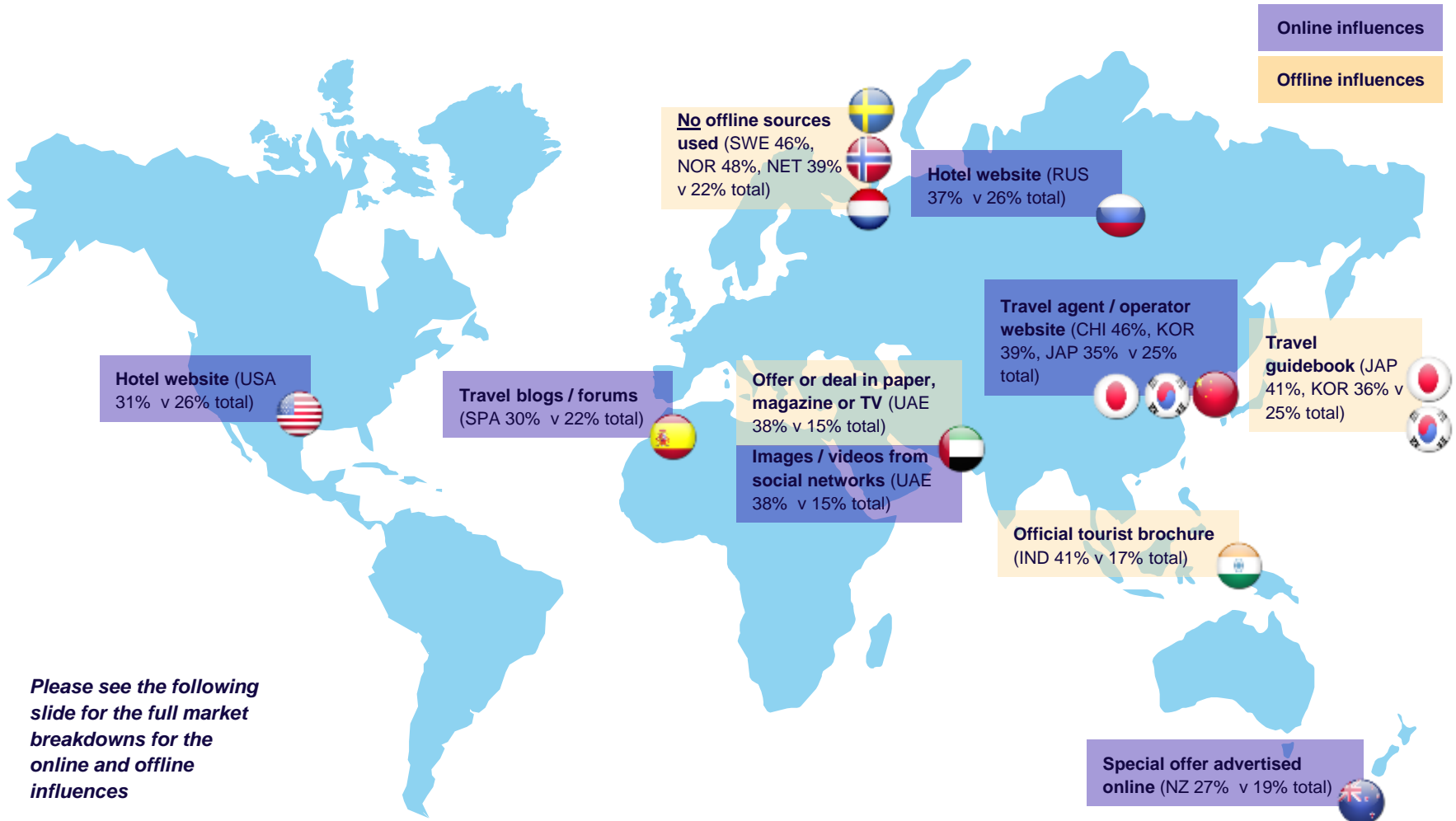
Influences for visiting Britain by age and gender

	TOTAL	Male	Female	18-24	25-34	35-44	45-54	55-64	65+
Talking to friends / relatives / colleagues	40%	38%	42%	44%	43%	42%	37%	37%	35%
Information from search engines [e.g. Google]	33%	34%	33%	34%	35%	36%	34%	32%	24%
Looking at prices of holidays/flights on price comparison websites	31%	31%	32%	33%	32%	32%	32%	29%	27%
Websites providing traveller reviews of destinations [e.g. TripAdvisor]	30%	28%	31%	30%	32%	34%	28%	29%	17%
Talking to friends or family in your social network (e.g. via Facebook / Twitter)	26%	26%	26%	32%	31%	29%	23%	22%	17%
An accommodation provider/ hotel website	26%	27%	25%	24%	26%	26%	27%	26%	25%
A travel guidebook	25%	27%	23%	25%	26%	28%	23%	24%	22%
Travel agent or tour operator website	25%	26%	24%	22%	23%	26%	25%	28%	26%
Offline: None of these	22%	21%	24%	18%	17%	18%	29%	27%	32%
Travel blogs / forums	22%	22%	22%	26%	27%	27%	19%	17%	10%
Travel programme on TV	19%	20%	18%	19%	20%	23%	17%	16%	13%
A special offer or price deal you saw advertised online	19%	19%	18%	24%	21%	19%	17%	18%	13%
Online: None of these	18%	16%	20%	13%	13%	14%	22%	22%	30%
Travel agent or tour operator brochure	18%	19%	17%	16%	17%	20%	16%	20%	16%
An official tourist organisation website or social media site for the country or destination:	18%	19%	17%	18%	19%	19%	16%	17%	15%
An official tourist brochure for the country / city / region	17%	18%	17%	19%	17%	20%	16%	17%	15%
A travel feature / article in a magazine or newspaper	16%	17%	15%	20%	17%	18%	15%	14%	12%
Direct advice from a travel agent/tour operator (face-to-face, over the phone)	16%	17%	15%	15%	17%	18%	14%	16%	12%
Images or videos your friends or family have posted to social media	15%	15%	15%	22%	20%	17%	11%	10%	6%
Images / information in online adverts	15%	16%	14%	18%	18%	17%	12%	12%	9%
A special offer or price deal you saw advertised offline e.g. in a newspaper, magazine or on TV	15%	15%	15%	18%	17%	17%	12%	12%	10%
Images or videos from a photo/video sharing social network site (e.g. YouTube / Flickr / Instagram)	14%	15%	13%	20%	19%	17%	9%	9%	4%
Travel app	14%	15%	12%	16%	17%	17%	11%	9%	6%
Images / information in adverts in a magazine or newspaper	12%	14%	10%	16%	15%	14%	10%	10%	7%
Articles on an online encyclopaedia e.g. Wikipedia, Wikitravel	12%	13%	11%	15%	15%	14%	9%	9%	7%
Images / information in TV adverts	11%	13%	10%	15%	15%	15%	8%	7%	4%
Seeing social media posts from celebrities talking about their holiday destinations	9%	9%	8%	14%	13%	11%	5%	4%	2%
Images / information on billboards / poster adverts	9%	10%	7%	13%	13%	10%	5%	5%	2%
Travel programme on radio	6%	7%	6%	8%	9%	8%	3%	3%	1%
Information in radio adverts	6%	6%	5%	7%	9%	8%	3%	3%	1%

QR2 & 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?

Base: All Respondents (11,400), Male (5,267), Female (5,042), 18-24 (941), 25-34 (2,938), 35-44 (2,165), 45-54 (1,744), 55-64 (1,400), 65+ (1,121)

Key market differences for influences



Please see the following slide for the full market breakdowns for the online and offline influences

QR2 & 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?

Base: All Respondents (11,400), 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)

Online and Offline influences for visiting Britain by market

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%

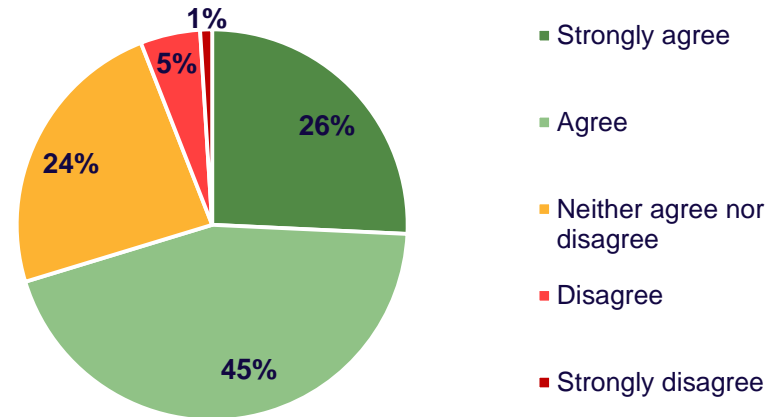
QR2 and QR3 (Visitors & Considerers): Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

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

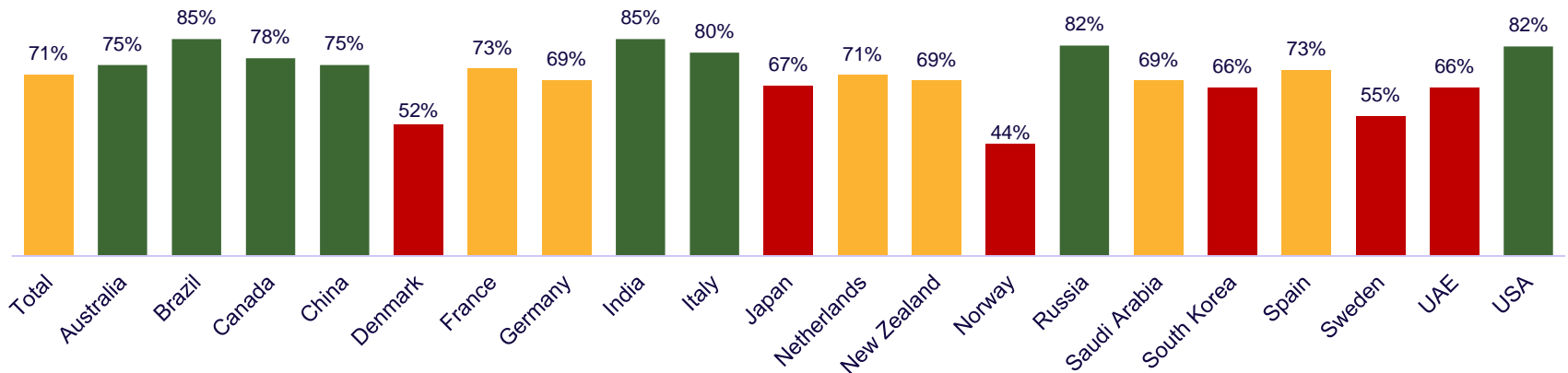
Immersing in local culture

A quarter would strongly agree that immersing themselves in the culture is important when travelling abroad, and a further 45% would agree.

Certain markets are more likely to want to immerse themselves in the local culture, with 85% in **Brazil** and **India** in agreement, closely following by 82% of **Russia** and **USA**. At the other end of the scale, **Norway** (44%) and **Denmark** (52%) are less likely to agree that this is how they feel.



I like to immerse myself in the culture and feel like a local (% strongly agree & agree)



Source: QR8. To what extent do you agree with the following statements? 'When traveling to a foreign country I like to immerse myself in the culture and feel like a local'
 Base: 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)



6. Reasons for choosing to visit Britain

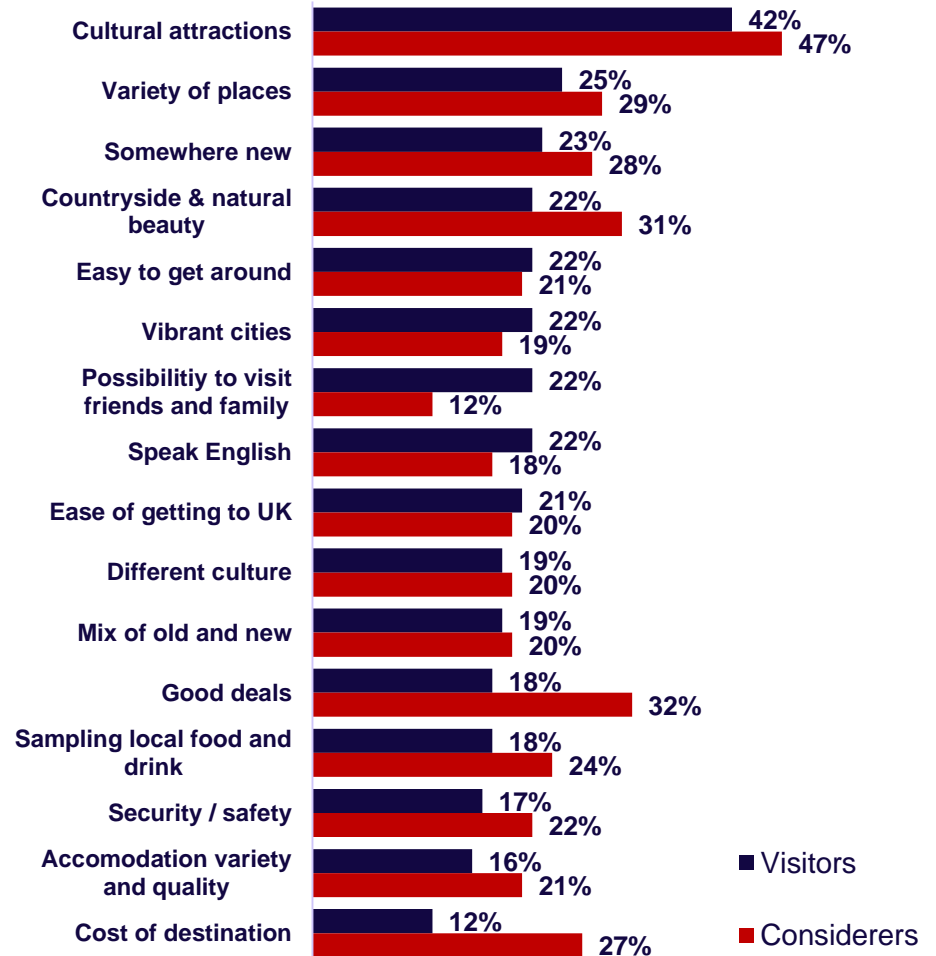
Reasons to visit Britain

Whilst cultural attractions remain the key motivator for almost half of considerers, deals are a strong driver for a third, which could indicate that they are waiting for the right time to travel.

Visitors to Britain were likely to have been convinced by the cultural attractions, following by the variety and wanting to go somewhere new.



Top motivators to visit Britain



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)

Reasons to visit Britain by market

Whilst visiting cultural attractions is a key reason why visitors and considerers might choose to come to Britain for all, there are distinct differences for the different markets too.

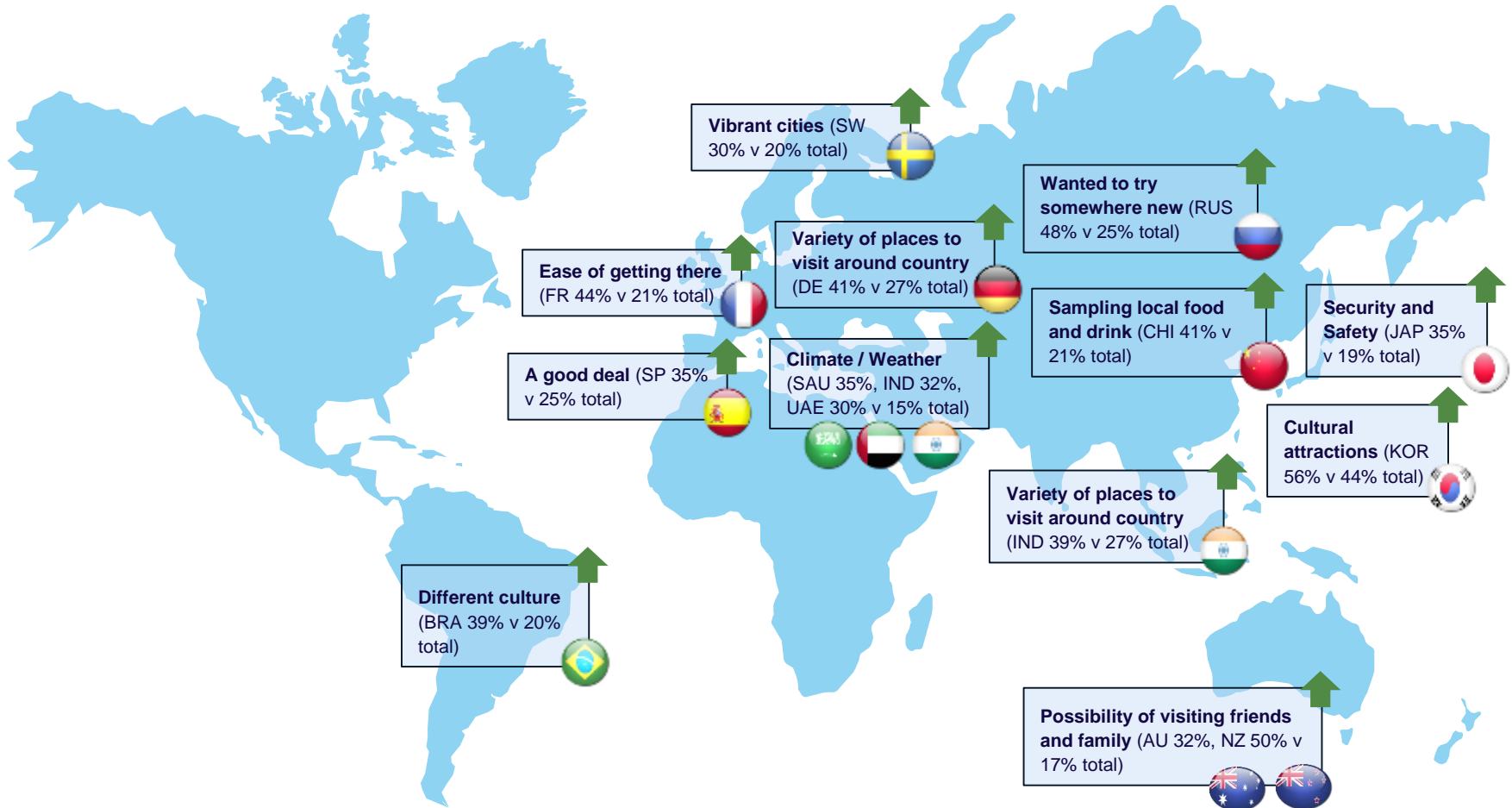
Please see the following slide for some of the key market highlights.

	TOT	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA
Cultural attractions e.g. historic buildings and famous sights	44%	44%	40%	44%	53%	58%	46%	49%	31%	44%	47%	44%	44%	45%	51%	17%	56%	40%	44%	27%	38%
A wide variety of places to visit around the country	27%	28%	34%	28%	28%	14%	33%	41%	39%	27%	24%	23%	32%	18%	37%	18%	26%	24%	20%	18%	27%
Countryside and natural beauty	27%	31%	20%	28%	41%	31%	18%	38%	37%	16%	24%	36%	28%	18%	16%	32%	27%	21%	20%	23%	28%
I'd never been before and wanted to go somewhere new	25%	20%	29%	25%	24%	17%	24%	29%	16%	29%	27%	21%	25%	21%	48%	25%	31%	26%	22%	26%	22%
A good deal e.g. on flights, total holiday package	25%	26%	22%	29%	30%	18%	33%	18%	27%	24%	20%	19%	29%	32%	25%	17%	25%	35%	16%	30%	26%
Easy to get around	22%	29%	24%	22%	16%	32%	25%	16%	21%	22%	20%	12%	25%	27%	15%	17%	20%	23%	19%	19%	27%
Sampling the local food and drink	21%	18%	27%	25%	41%	26%	17%	17%	17%	12%	20%	15%	17%	14%	30%	18%	21%	16%	22%	22%	23%
The ease of getting to the country	21%	19%	12%	17%	20%	28%	44%	19%	24%	19%	17%	16%	21%	29%	13%	16%	11%	24%	23%	16%	17%
Vibrant cities	20%	15%	12%	15%	24%	29%	26%	32%	20%	18%	11%	31%	15%	26%	10%	22%	14%	16%	30%	20%	17%
Somewhere where they speak English	20%	18%	20%	19%	12%	23%	20%	31%	19%	21%	23%	11%	18%	23%	21%	16%	17%	24%	17%	16%	23%
A mix of old and new	20%	25%	24%	24%	9%	24%	12%	21%	16%	18%	9%	15%	25%	23%	25%	18%	25%	18%	23%	18%	21%
A culture that is different from our own	20%	9%	39%	14%	28%	13%	29%	16%	22%	25%	22%	22%	9%	7%	23%	21%	27%	22%	8%	19%	19%
The cost of staying in the destination (price of accommodation, food and drink)	20%	23%	21%	22%	23%	18%	8%	11%	22%	18%	17%	17%	23%	24%	27%	14%	18%	25%	17%	26%	22%
Security / safety	19%	19%	31%	25%	33%	6%	7%	11%	29%	12%	35%	6%	17%	14%	17%	18%	25%	26%	8%	27%	25%
Accommodation – variety and quality	18%	18%	26%	16%	25%	12%	12%	14%	30%	16%	19%	19%	16%	17%	17%	21%	18%	18%	9%	24%	21%
Possibility of visiting friends or relatives	17%	32%	13%	20%	10%	14%	13%	12%	28%	12%	10%	13%	50%	18%	9%	10%	10%	13%	13%	20%	18%
Contemporary culture (e.g. music, films, art, literature)	17%	10%	26%	12%	26%	21%	14%	12%	15%	18%	15%	12%	11%	15%	17%	17%	19%	17%	26%	24%	17%
The climate / weather	15%	15%	19%	15%	24%	6%	5%	8%	32%	11%	18%	6%	13%	6%	20%	35%	16%	10%	3%	30%	17%
A wide range of holiday activities	15%	18%	16%	15%	13%	8%	6%	14%	24%	21%	11%	5%	15%	8%	15%	22%	21%	20%	9%	22%	18%
Easy to get plan/organise	14%	15%	14%	14%	8%	21%	20%	16%	18%	18%	9%	8%	14%	23%	9%	13%	10%	14%	14%	18%	18%
Meeting the local people	14%	13%	29%	13%	6%	14%	18%	16%	18%	13%	8%	12%	12%	11%	12%	9%	8%	14%	14%	16%	17%
Watching sport	10%	9%	11%	7%	13%	10%	4%	4%	14%	3%	5%	8%	9%	15%	10%	9%	13%	6%	15%	17%	14%
Visit a film or TV location	9%	6%	9%	4%	8%	6%	3%	5%	11%	4%	6%	4%	5%	7%	28%	11%	24%	7%	5%	11%	11%
Somewhere it is easy to visit with children	8%	8%	10%	6%	10%	6%	10%	3%	13%	8%	4%	4%	8%	3%	14%	15%	7%	8%	6%	14%	13%

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?

Base: All Respondents (11,400), 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)

Reasons to visit Britain - key market differences



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?

Base: All Respondents (11,400), 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)



7. Motivators for visiting Britain - IPS

Reasons for visiting Britain for a holiday

In the 2015 International Passenger Survey (IPS), holiday visitors were asked to give their top reasons why they chose to visit the UK that particular time.

The results echo the findings from elsewhere in this report. Over a third cited the UK's **heritage and history** as a key reason why they chose to visit for a holiday in 2015. **Culture** is the next most prominent draw, followed closely by the chance to see **world famous places**, all of which are closely linked and make Britain such a strong tourism offer.

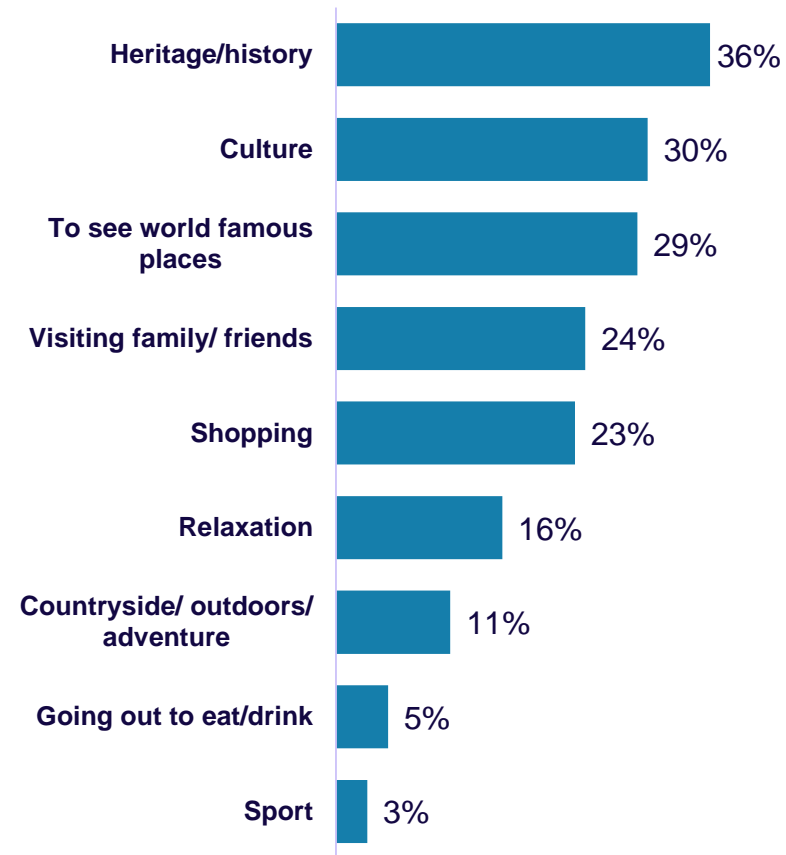
The opportunity to visit **family and friends** was an important reason for a quarter of holiday visitors. Visiting Friends and Relatives is a separate journey purpose in the IPS; this result highlights that there is some overlap between the two purposes.

Leisure activities including **shopping** (23%) and **relaxation** (16%) are the next most important activities, and the countryside and outdoors activities are key for 11%.

Going out to eat and drink falls low on the list of reasons to visit, indicating that it is not a primary reason for most, but an expected part of a holiday. (For more on this topic please refer to Foresight 146: How the world views Britain's food.)

Sport is also low on the list, cited as a key reason for just 3%. Whilst the UK attracts many tourists visiting for sport, if the main purpose of the trip was to watch sport then the visitor would be counted under the 'miscellaneous' purpose rather than holidays.

Reason why holiday visitors chose to visit the UK



Reasons for visiting Britain for a holiday

Market

The UK's **heritage and history** is the key driver for visiting for most markets; however, there are some key differences across markets that are useful to look at in more detail. **Heritage and history is a particularly strong reason for visitors from** China, New Zealand, South Korea, Brazil and USA. **Shopping** is a stronger driver for visitors from Saudi Arabia, Norway, UAE and Denmark, who all rate this higher than average. The UK's **countryside and outdoors/adventure** are key reasons for visitors from the Netherlands, Germany and New Zealand. The potential to **visit friends and family** is key for New Zealand, India and Australia. **Culture** is important for visitors from Russia, China and Japan, and the opportunity to **see world famous places is a big draw** for South Korea, Brazil Spain and China.

	Total	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA
Heritage/history	36%	40%	48%	39%	52%	35%	40%	38%	31%	37%	43%	32%	55%	29%	32%	17%	47%	35%	29%	17%	43%
Culture	30%	22%	35%	28%	40%	25%	35%	30%	17%	36%	41%	28%	21%	29%	44%	24%	33%	35%	34%	11%	34%
To see world famous places	29%	25%	48%	29%	39%	25%	28%	30%	29%	34%	36%	23%	26%	21%	18%	16%	54%	41%	32%	18%	30%
Visiting family/friends	24%	43%	16%	35%	18%	17%	21%	16%	52%	19%	22%	15%	55%	16%	23%	34%	10%	23%	13%	38%	26%
Shopping	23%	12%	19%	13%	27%	39%	23%	19%	12%	29%	31%	24%	12%	43%	23%	51%	14%	22%	39%	41%	14%
Relaxation	16%	16%	13%	14%	9%	19%	11%	13%	9%	17%	5%	23%	13%	25%	10%	32%	7%	18%	22%	27%	16%
Countryside/outdoors/adventure	11%	12%	5%	16%	12%	12%	9%	21%	4%	7%	8%	21%	21%	7%	7%	3%	4%	9%	8%	8%	11%
Going out to eat/drink	5%	4%	7%	4%	0%	5%	5%	5%	3%	4%	6%	8%	6%	11%	4%	8%	4%	3%	10%	7%	4%
Sport	3%	7%	2%	1%	2%	7%	1%	2%	0%	1%	3%	4%	12%	5%	4%	3%	2%	1%	7%	4%	3%



Researching and Planning

Foresight – issue 150