

Online and Offline influences for visiting Britain by market (1/4)

Scores adjusted for market comparability
(see notes)

	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS
Talking to friends / relatives / colleagues	43%	31%	49%	28%	70%	58%	51%	27%	49%	26%	52%	50%	65%	35%
Information from search engines [e.g. Google]	38%	28%	38%	22%	48%	42%	44%	26%	41%	29%	54%	37%	38%	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%
Websites providing traveller reviews of destinations [e.g. TripAdvisor]	39%	29%	38%	25%	26%	36%	29%	24%	43%	29%	37%	33%	41%	28%
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%
An accommodation provider/ hotel website	31%	23%	27%	17%	32%	30%	28%	18%	25%	34%	53%	27%	54%	27%
A travel guidebook	21%	23%	24%	24%	21%	43%	32%	20%	24%	44%	19%	21%	20%	22%
Travel agent or tour operator website	27%	26%	21%	27%	40%	24%	24%	21%	16%	37%	32%	22%	32%	22%
Travel blogs / forums	18%	21%	21%	19%	12%	27%	17%	20%	32%	22%	19%	17%	12%	29%
Travel programme on TV	18%	21%	13%	24%	7%	20%	20%	19%	17%	27%	14%	15%	11%	23%
A special offer or price deal you saw advertised online	25%	19%	21%	16%	26%	19%	15%	18%	18%	13%	17%	30%	16%	15%
Travel agent or tour operator brochure	19%	19%	15%	22%	14%	19%	16%	20%	14%	25%	16%	19%	11%	16%
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%

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)

Online and Offline influences for visiting Britain by market (2/4)

Scores adjusted for market comparability (see notes)

	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS
An official tourist brochure for the country / city / region	17%	19%	18%	19%	11%	28%	21%	22%	16%	21%	11%	15%	12%	15%
A travel feature / article in a magazine or newspaper	14%	15%	14%	18%	20%	14%	23%	21%	12%	18%	9%	13%	16%	15%
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%
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%
Images / information in online adverts	14%	18%	15%	13%	9%	6%	15%	16%	13%	11%	16%	12%	19%	21%
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%
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%
Travel app	11%	19%	13%	18%	5%	9%	8%	16%	8%	12%	8%	8%	8%	16%
Images / information in adverts in a magazine or newspaper	9%	13%	9%	16%	10%	6%	12%	17%	12%	15%	7%	10%	10%	8%
Articles on an online encyclopaedia e.g. Wikipedia, Wikitravel	9%	10%	10%	16%	6%	6%	12%	15%	12%	10%	6%	11%	16%	13%
Images / information in TV adverts	9%	16%	9%	16%	3%	4%	8%	16%	10%	12%	7%	8%	5%	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%
Images / information on billboards / poster adverts	7%	9%	7%	11%	2%	4%	6%	13%	9%	6%	7%	7%	2%	8%
Travel programme on radio	4%	7%	6%	7%	2%	6%	4%	9%	5%	5%	4%	3%	2%	6%
Information in radio adverts	4%	8%	6%	7%	0%	3%	3%	9%	6%	4%	3%	2%	0%	5%

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)

Online and Offline influences for visiting Britain by market (3/4)

<i>Scores adjusted for market comparability (see notes)</i>	SAU	KOR	SPA	SWE	UAE	USA	TOT
Talking to friends / relatives / colleagues	34%	35%	54%	72%	25%	31%	40%
Information from search engines [e.g. Google]	22%	36%	32%	43%	18%	31%	33%
Looking at prices of holidays/flights on price comparison websites	27%	27%	25%	49%	24%	25%	31%
Websites providing traveller reviews of destinations [e.g. TripAdvisor]	16%	22%	33%	24%	18%	32%	30%
Talking to friends or family in your social network (e.g. via Facebook / Twitter)	27%	22%	31%	42%	23%	24%	26%
An accommodation provider/ hotel website	17%	21%	25%	23%	17%	25%	26%
A travel guidebook	23%	30%	34%	18%	19%	24%	25%
Travel agent or tour operator website	16%	32%	19%	40%	16%	20%	25%
Travel blogs / forums	19%	35%	36%	20%	14%	22%	22%
Travel programme on TV	16%	25%	15%	15%	16%	20%	19%
A special offer or price deal you saw advertised online	23%	16%	23%	18%	18%	18%	19%
Travel agent or tour operator brochure	13%	21%	16%	15%	19%	14%	18%
An official tourist organisation website or social media site for the country or destination	17%	15%	14%	18%	23%	17%	18%

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)

Online and Offline influences for visiting Britain by market (4/4)

<i>Scores adjusted for market comparability (see notes)</i>	SAU	KOR	SPA	SWE	UAE	USA	TOT
An official tourist brochure for the country / city / region	13%	14%	19%	13%	19%	16%	17%
A travel feature / article in a magazine or newspaper	15%	17%	16%	6%	17%	17%	16%
Direct advice from a travel agent/tour operator (face-to-face, over the phone)	17%	20%	13%	12%	19%	15%	16%
Images or videos your friends or family have posted to social media	23%	20%	13%	10%	17%	16%	15%
Images / information in online adverts	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	19%	9%	10%	9%	24%	14%	15%
Images or videos from a photo/video sharing social network site	22%	15%	14%	8%	24%	17%	14%
Travel app	22%	16%	14%	7%	16%	16%	14%
Images / information in adverts in a magazine or newspaper	15%	12%	12%	9%	18%	15%	12%
Articles on an online encyclopaedia e.g. Wikipedia, Wikitravel	15%	9%	9%	7%	17%	15%	12%
Images / information in TV adverts	15%	12%	7%	6%	17%	15%	11%
Seeing social media posts from celebrities talking about their holiday destinations	15%	13%	4%	3%	17%	12%	9%
Images / information on billboards / poster adverts	15%	6%	8%	7%	18%	11%	9%
Travel programme on radio	12%	5%	6%	4%	11%	9%	6%
Information in radio adverts	10%	4%	3%	2%	12%	11%	6%

QR2 and QR3 (Visitors & Considerers): Which of the following sources influenced your choice of destination?

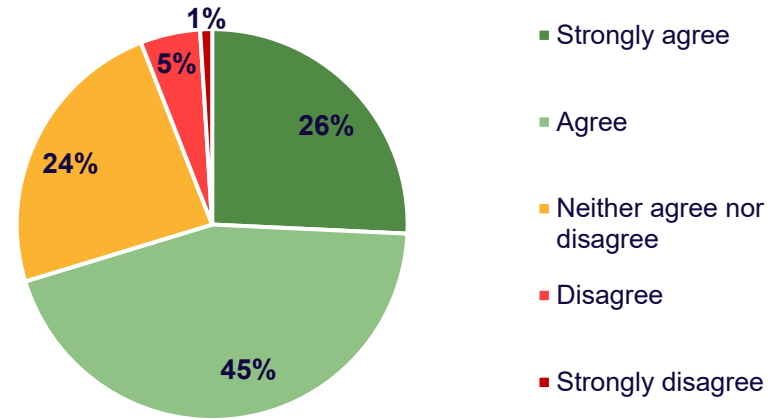
(Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

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

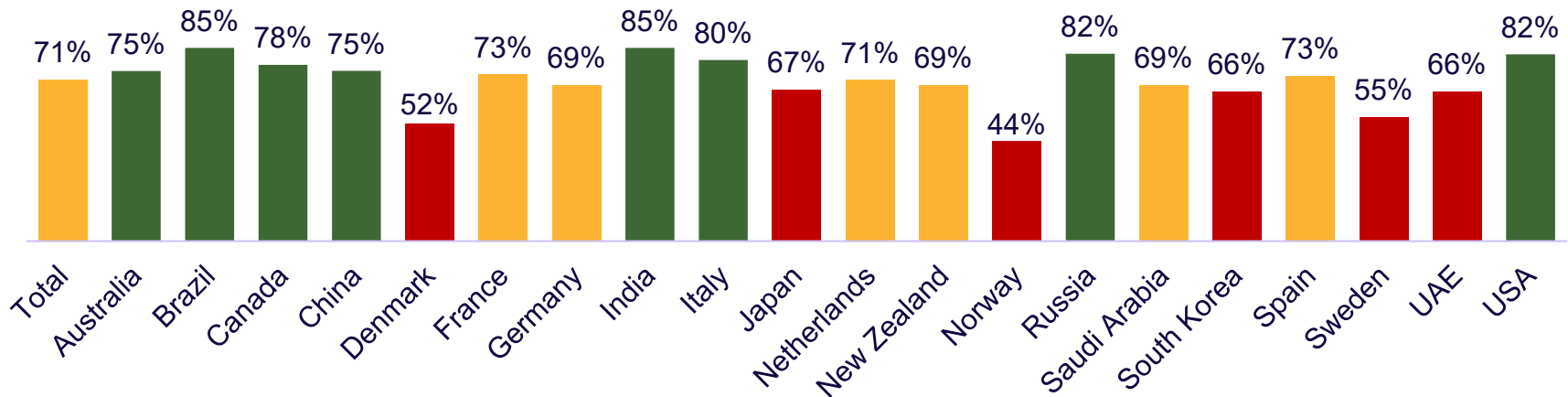
Immersing in local culture

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)

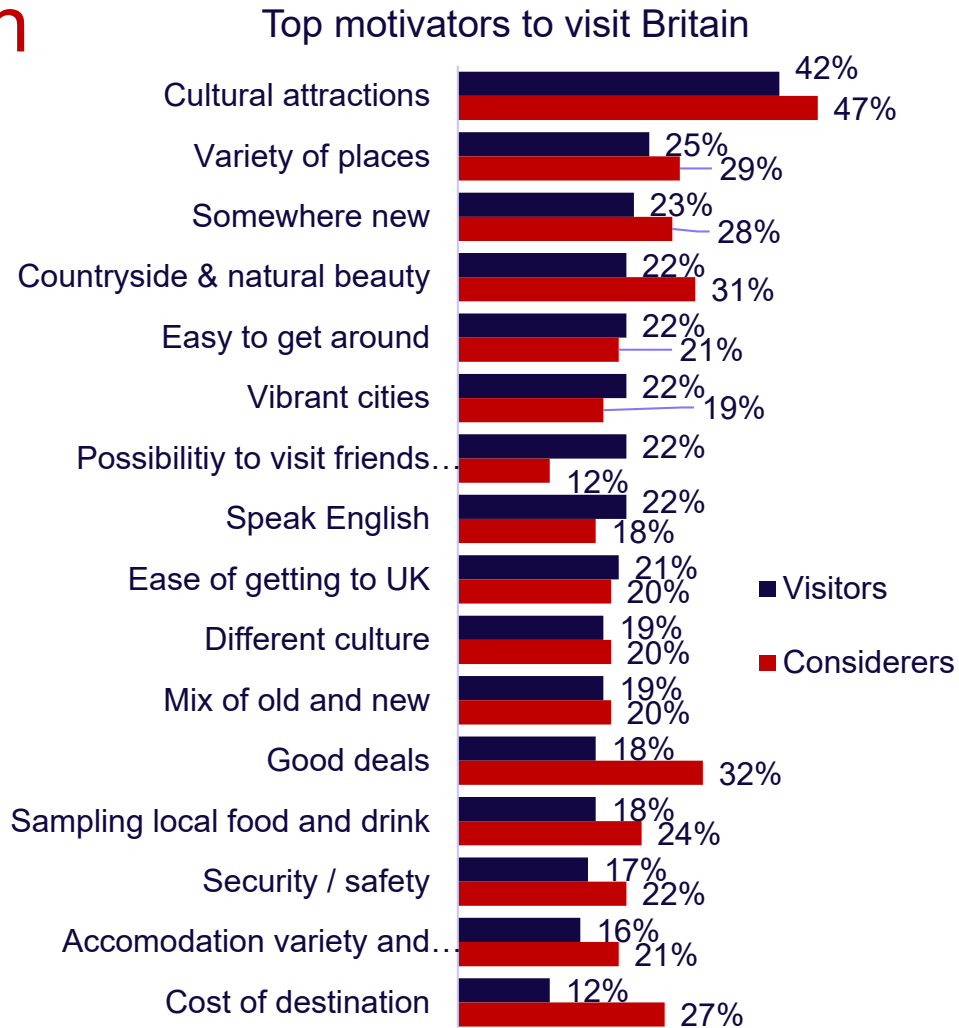
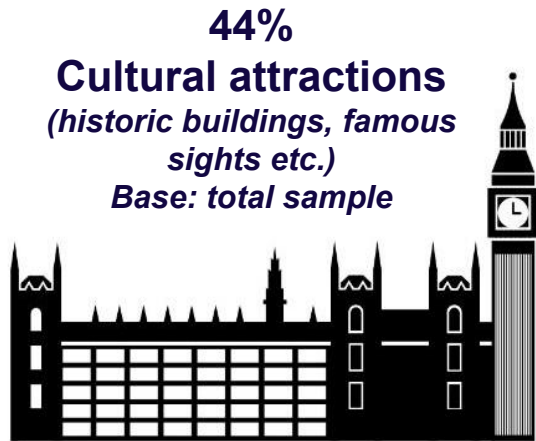


6. Reasons for choosing to visit Britain

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.



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 (1/5)

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

	TOT	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR
Cultural attractions e.g. historic buildings and famous sights	44%	44%	40%	44%	53%	58%	46%	49%	31%	44%	47%	44%	44%	45%
A wide variety of places to visit around the country	27%	28%	34%	28%	28%	14%	33%	41%	39%	27%	24%	23%	32%	18%
Countryside and natural beauty	27%	31%	20%	28%	41%	31%	18%	38%	37%	16%	24%	36%	28%	18%
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%
A good deal e.g. on flights, total holiday package	25%	26%	22%	29%	30%	18%	33%	18%	27%	24%	20%	19%	29%	32%
Easy to get around	22%	29%	24%	22%	16%	32%	25%	16%	21%	22%	20%	12%	25%	27%
Sampling the local food and drink	21%	18%	27%	25%	41%	26%	17%	17%	17%	12%	20%	15%	17%	14%
The ease of getting to the country	21%	19%	12%	17%	20%	28%	44%	19%	24%	19%	17%	16%	21%	29%

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 by market (2/5)

	TOT	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR
Vibrant cities	20%	15%	12%	15%	24%	29%	26%	32%	20%	18%	11%	31%	15%	26%
Somewhere where they speak English	20%	18%	20%	19%	12%	23%	20%	31%	19%	21%	23%	11%	18%	23%
A mix of old and new	20%	25%	24%	24%	9%	24%	12%	21%	16%	18%	9%	15%	25%	23%
A culture that is different from our own	20%	9%	39%	14%	28%	13%	29%	16%	22%	25%	22%	22%	9%	7%
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%
Security / safety	19%	19%	31%	25%	33%	6%	7%	11%	29%	12%	35%	6%	17%	14%
Accommodation – variety and quality	18%	18%	26%	16%	25%	12%	12%	14%	30%	16%	19%	19%	16%	17%
Possibility of visiting friends or relatives	17%	32%	13%	20%	10%	14%	13%	12%	28%	12%	10%	13%	50%	18%
Contemporary culture (e.g. music, films, art, literature)	17%	10%	26%	12%	26%	21%	14%	12%	15%	18%	15%	12%	11%	15%
The climate / weather	15%	15%	19%	15%	24%	6%	5%	8%	32%	11%	18%	6%	13%	6%

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 by market (3/5)

	TOT	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR
A wide range of holiday activities	15%	18%	16%	15%	13%	8%	6%	14%	24%	21%	11%	5%	15%	8%
Easy to get plan/organise	14%	15%	14%	14%	8%	21%	20%	16%	18%	18%	9%	8%	14%	23%
Meeting the local people	14%	13%	29%	13%	6%	14%	18%	16%	18%	13%	8%	12%	12%	11%
Watching sport	10%	9%	11%	7%	13%	10%	4%	4%	14%	3%	5%	8%	9%	15%
Visit a film or TV location	9%	6%	9%	4%	8%	6%	3%	5%	11%	4%	6%	4%	5%	7%
Somewhere it is easy to visit with children	8%	8%	10%	6%	10%	6%	10%	3%	13%	8%	4%	4%	8%	3%

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 by market (4/5)

	RUS	SAU	KOR	SPA	SWE	UAE	USA
Cultural attractions e.g. historic buildings and famous sights	51%	17%	56%	40%	44%	27%	38%
A wide variety of places to visit around the country	37%	18%	26%	24%	20%	18%	27%
Countryside and natural beauty	16%	32%	27%	21%	20%	23%	28%
I'd never been before and wanted to go somewhere new	48%	25%	31%	26%	22%	26%	22%
A good deal e.g. on flights, total holiday package	25%	17%	25%	35%	16%	30%	26%
Easy to get around	15%	17%	20%	23%	19%	19%	27%
Sampling the local food and drink	30%	18%	21%	16%	22%	22%	23%
The ease of getting to the country	13%	16%	11%	24%	23%	16%	17%
Vibrant cities	10%	22%	14%	16%	30%	20%	17%
Somewhere where they speak English	21%	16%	17%	24%	17%	16%	23%
A mix of old and new	25%	18%	25%	18%	23%	18%	21%
A culture that is different from our own	23%	21%	27%	22%	8%	19%	19%
The cost of staying in the destination (price of accommodation, food and drink)	27%	14%	18%	25%	17%	26%	22%

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)

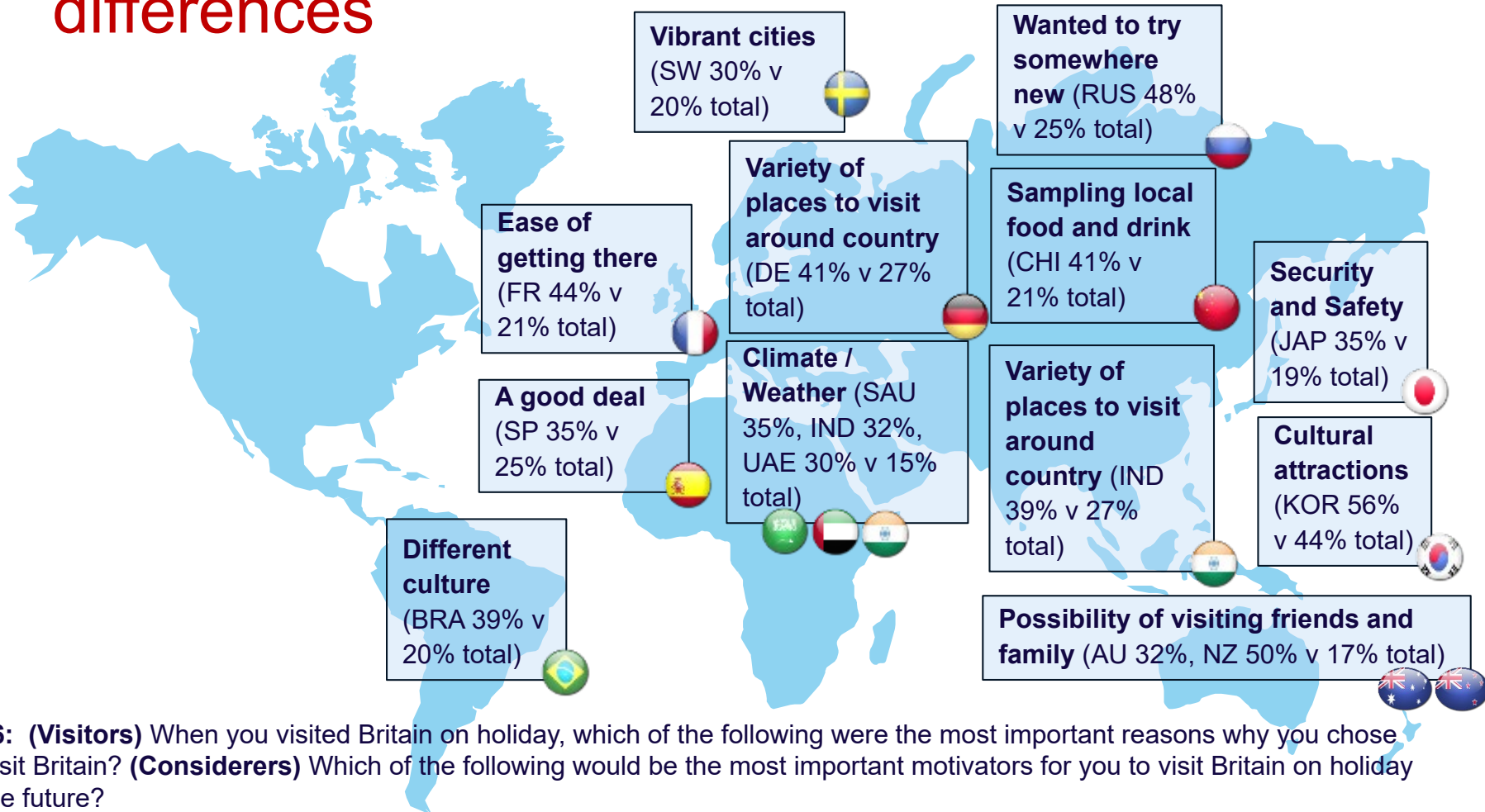
Reasons to visit Britain by market (5/5)

	RUS	SAU	KOR	SPA	SWE	UAE	USA
Security / safety	17%	18%	25%	26%	8%	27%	25%
Accommodation – variety and quality	17%	21%	18%	18%	9%	24%	21%
Possibility of visiting friends or relatives	9%	10%	10%	13%	13%	20%	18%
Contemporary culture (e.g. music, films, art, literature)	17%	17%	19%	17%	26%	24%	17%
The climate / weather	20%	35%	16%	10%	3%	30%	17%
A wide range of holiday activities	15%	22%	21%	20%	9%	22%	18%
Easy to get plan/organise	9%	13%	10%	14%	14%	18%	18%
Meeting the local people	12%	9%	8%	14%	14%	16%	17%
Watching sport	10%	9%	13%	6%	15%	17%	14%
Visit a film or TV location	28%	11%	24%	7%	5%	11%	11%
Somewhere it is easy to visit with children	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. 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.

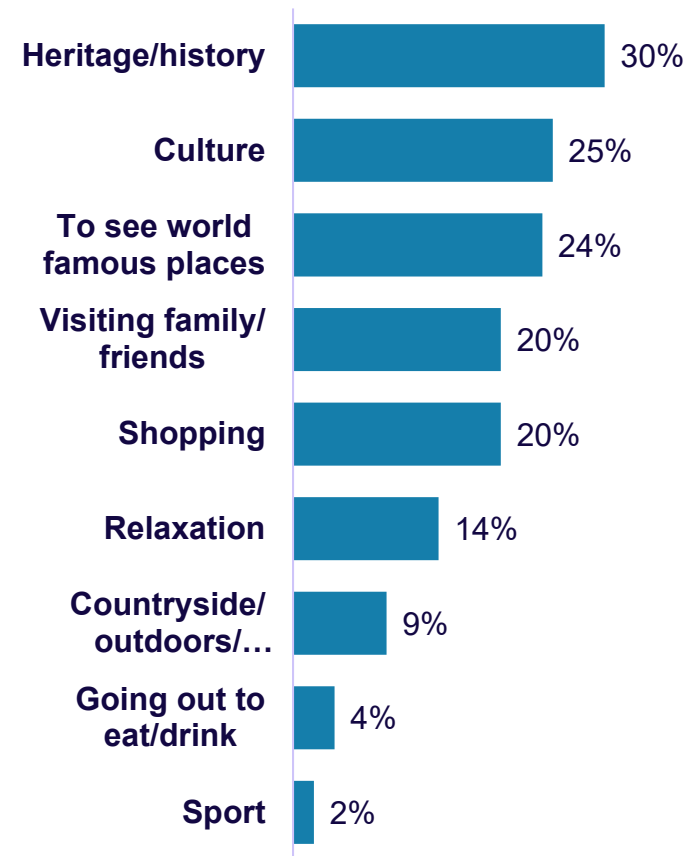
The opportunity to visit **family and friends** was an important reason for a fifth of holiday visitors. Visiting Friends and Relatives is a separate journey purpose in the IPS; this result highlights that there is some overlap between the two purposes.

Leisure activities including **shopping** (20%) and **relaxation** (14%) are the next most important activities, and the countryside and outdoors activities are key for 9%.

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 2%. 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



Source: ONS IPS 2015: Why did you choose to visit the UK this time? Please choose up to 3 reasons.

Base: All departing holiday visitors to the UK (excluding 'don't know/NA', and 'didn't choose') n=14,358

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 New Zealand, Brazil, USA, Australia and China.** **Shopping** is a stronger driver for visitors from Saudi Arabia, UAE, Norway, Denmark and Sweden who all rate this higher than average. The UK's **countryside and outdoors/adventure** are key reasons for visitors from the Netherlands, New Zealand and Germany. The potential to **visit friends and family** is key for New Zealand, India and Australia. **Culture** is important for visitors from Russia, Sweden, USA, France and Italy, and the opportunity to **see world famous places** is a big draw for Brazil, South Korea, Spain and Sweden.

	Total	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA
Heritage/history	30%	36%	38%	34%	35%	31%	34%	32%	23%	29%	29%	29%	49%	24%	21%	15%	31%	28%	25%	14%	36%
Culture	25%	20%	28%	25%	26%	22%	29%	25%	14%	29%	27%	26%	18%	25%	30%	19%	22%	28%	30%	9%	29%
To see world famous places	24%	22%	38%	26%	26%	23%	24%	26%	22%	26%	24%	21%	23%	18%	15%	13%	35%	32%	28%	15%	25%
Visiting family/friends	20%	38%	12%	31%	11%	15%	18%	14%	40%	15%	14%	14%	49%	14%	15%	27%	7%	18%	12%	30%	22%
Shopping	20%	11%	15%	12%	19%	36%	19%	16%	9%	22%	20%	22%	11%	36%	16%	42%	9%	17%	35%	38%	12%
Relaxation	14%	14%	10%	13%	6%	18%	9%	11%	7%	14%	3%	21%	12%	21%	8%	26%	5%	14%	19%	25%	14%
Countryside/outdoors/adventure	9%	11%	4%	14%	8%	10%	8%	17%	3%	5%	5%	19%	18%	6%	6%	2%	3%	7%	7%	6%	9%
Going out to eat/drink	4%	4%	6%	3%	0%	5%	4%	4%	2%	3%	4%	8%	6%	9%	3%	7%	3%	3%	9%	6%	4%
Sport	2%	6%	1%	1%	1%	6%	1%	2%	0%	1%	2%	3%	10%	4%	3%	3%	2%	1%	6%	4%	2%

Source: ONS IPS 2015: Why did you choose to visit the UK this time? Please choose up to 3 reasons.

Base: All departing holiday visitors to the UK (excluding 'don't know/NA', and 'didn't choose') n=14,358



Researching and Planning

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