

The Visitor Experience in Britain

Welcome, Expectations, Satisfaction & Recommendation

Foresight – issue 154

VisitBritain Research



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Introduction

This report is based on questions VisitBritain has sponsored on two surveys of departing visitors to the UK.

The Civil Aviation Authority (CAA) conducts a passenger survey among leisure visitors at UK airports each year. In 2016 the survey was conducted at the following 5 UK airports, Gatwick, Heathrow, Luton, Stansted and Manchester. VisitBritain sponsors some additional questions on the survey to gain a greater understanding of Britain's visitors. In 2015 we asked questions about how welcome visitors felt and how different trip elements met their expectations. In 2016 we repeated the welcome question.

VisitBritain also sponsors a number of questions each year on the International Passenger Survey to gain a greater understanding of Britain's visitors. This survey is conducted at dozens of ports of exit from the UK (air, sea and rail). In 2015 VisitBritain asked a question about the likelihood of departing visitors to recommend a visit to Britain to friends and family. Visitors were also asked about their satisfaction with four main trip elements: attractions & activities, public transport, food & drink and value for money.

Summary – Welcome & Expectations

Welcome

- Overall, visitors to the UK in 2016 felt a high level of welcome during their visit
 - 88% said they felt extremely or very welcome
 - The highest proportion who felt extremely welcome was amongst US visitors

Expectations

- Overall, 52% said that the overall enjoyment of their trip exceeded expectations and only 1% that it was below expectations.
- Looking at individual aspects of visitors' trips, the quality of tourist attractions were most likely to exceed expectations with 58% pleasantly surprised
- At the other end of the scale, provision of sights and information in visitors native language fell below expectations for 39% of those from non English speaking countries
 - Finding signs and information in their own language was a particular issue for around half of visitors from Finland, France, Japan, Netherlands, Spain and Sweden
- Ease of driving and finding food that appealed were two other areas for which visitors were less likely to say their expectations were exceeded.
- Those who felt extremely or very welcome during their trip were more likely to say that their overall enjoyment of their trip exceeded expectations.

Summary – Satisfaction & Recommendation

Satisfaction

- Attractions / activities and public transport are the trip elements in Britain that deliver the strongest levels of satisfaction amongst visitors to the UK. 92% were satisfied and 63% very satisfied with attractions/activities; 88% were satisfied and 58% very satisfied with public transport.
- Overall satisfaction of Britain's food & drink was 78% although a lower 39% were very satisfied. Value for money proved the most disappointing of these trip elements (41% were satisfied).

Recommendation

- Overall, 95% of visitors to the UK are likely to recommend Britain to friends and family
 - 69% say they are 'extremely likely' to recommend a visit to Britain to their friends and family
 - Women are more likely to recommend Britain over men and recommendation was also high amongst older age groups
 - In general, visitors from long-haul markets and those from primarily English speaking markets are more likely to strongly recommend Britain vs short-haul and non-English speaking countries.
 - The highest level of recommendation scores come from those that visited Britain for VFR or holiday purposes while those on business are less likely to recommend a visit to Britain.

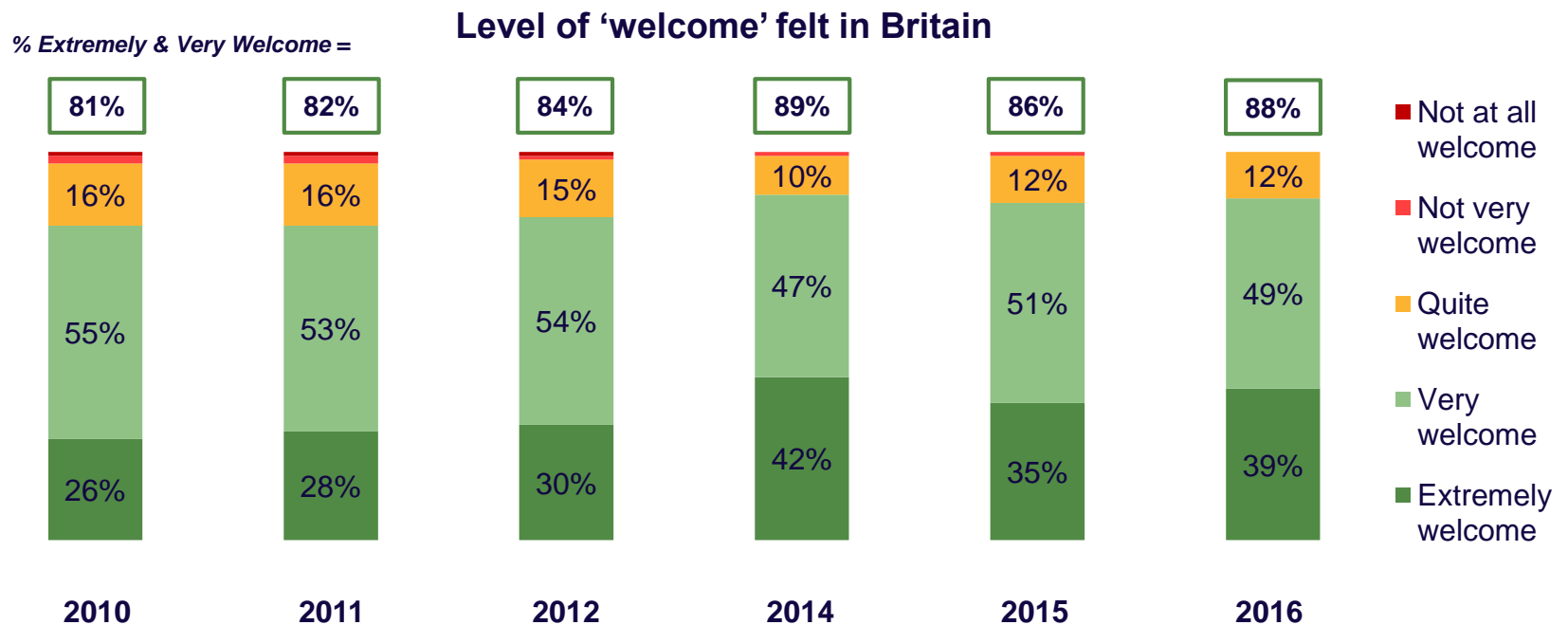


Britain's welcome



Britain's welcome

Almost two fifths said they felt 'extremely welcome' in Britain in 2016, and a further 49% said 'very welcome'. Overall, visitors to Britain are experiencing high levels of welcome, and this has risen during this decade.



Source: CAA Passenger Study 2016, Q: "How welcome did you feel in Britain?"

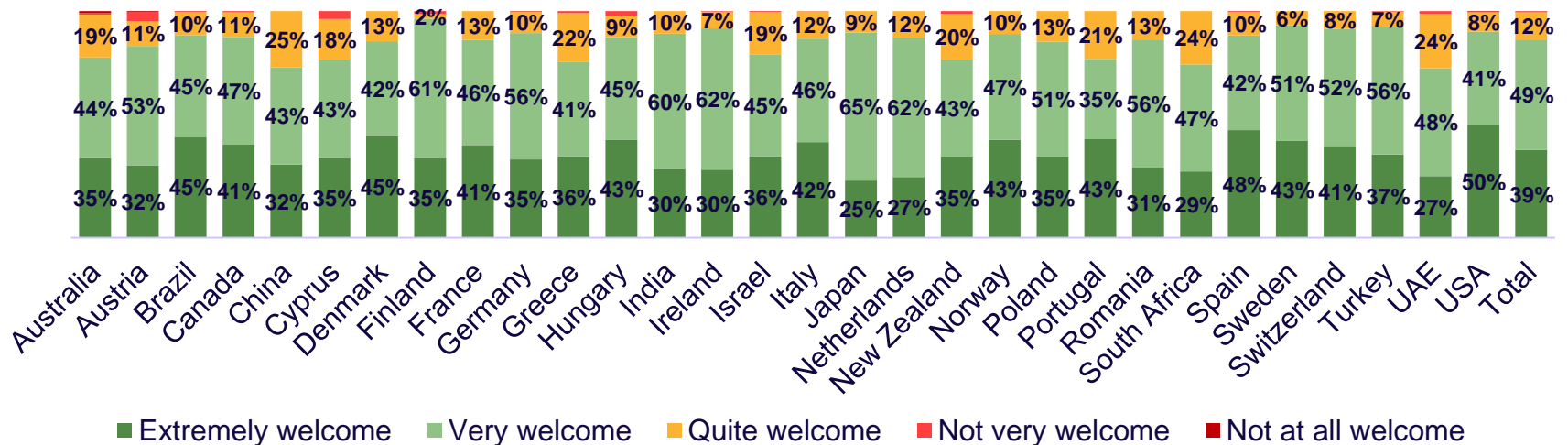
Base: leisure visitors. 2010=7,876, 2011=7,305, 2012=7,583, 2014=5,093, 2015=4,346, 2016=8,393

Britain's Welcome

Market breakdown

Among all markets there were very few who felt unwelcome during their trip to Britain. However, there were a few nations where there are lower levels of welcome – such as China, UAE and South Africa. In terms of nations who felt most welcome during their stay, USA, Spain, Brazil and Denmark have the highest proportion who felt 'extremely welcome'.

“How welcome did you feel in Britain?”



Source: CAA Passenger Study 2016, Q: “How welcome did you feel in Britain?”

Base: leisure visitors. Base=8,393.

Australia=486, Austria= 96, Brazil=68, Canada=474, China=77, Cyprus=50, Denmark=234, Finland=73, France=312, Germany=628, Greece=62, Hungary=59, India=92, Ireland=331. Israel=115, Italy=511, Japan=66, Netherlands=205, New Zealand=108, Norway=222, Poland=226, Portugal=97, Romania=92, South Africa=62, Spain=490, Sweden=270, Switzerland=184, Turkey=53, UAE=71, USA=1,595, Total=8,393

Expectations of trip elements

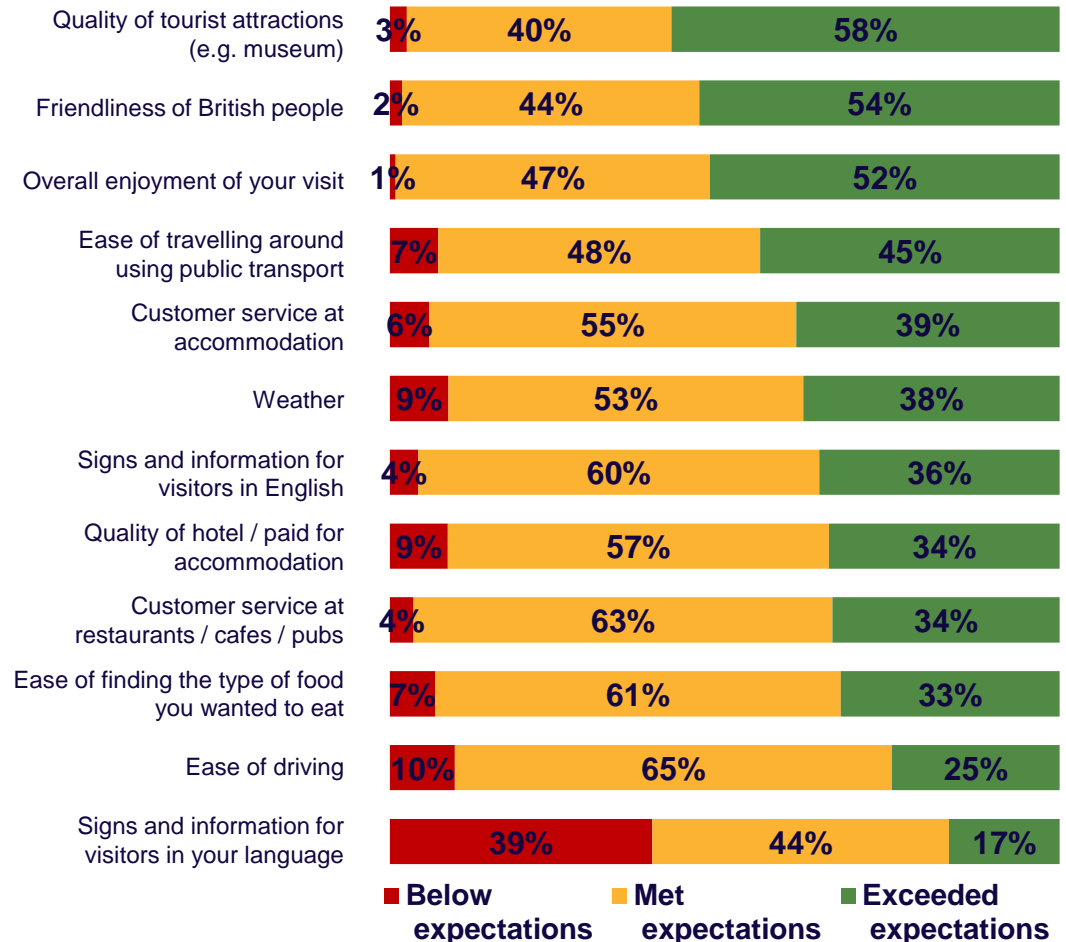


Expectations of visit attributes

The UK's quality of tourist attractions exceeded expectations for 58% of visitors. The friendliness of British people and overall visit enjoyment also exceeded expectations for over half.

Some improvement could be given to providing signs and information in more languages, as this fell below expectations for almost four in ten from non English speaking markets.

The attributes which were the strongest drivers of visitors' "overall enjoyment of visit" exceeding expectations were signs/information in own language and ease of driving (amongst those for whom this applied).



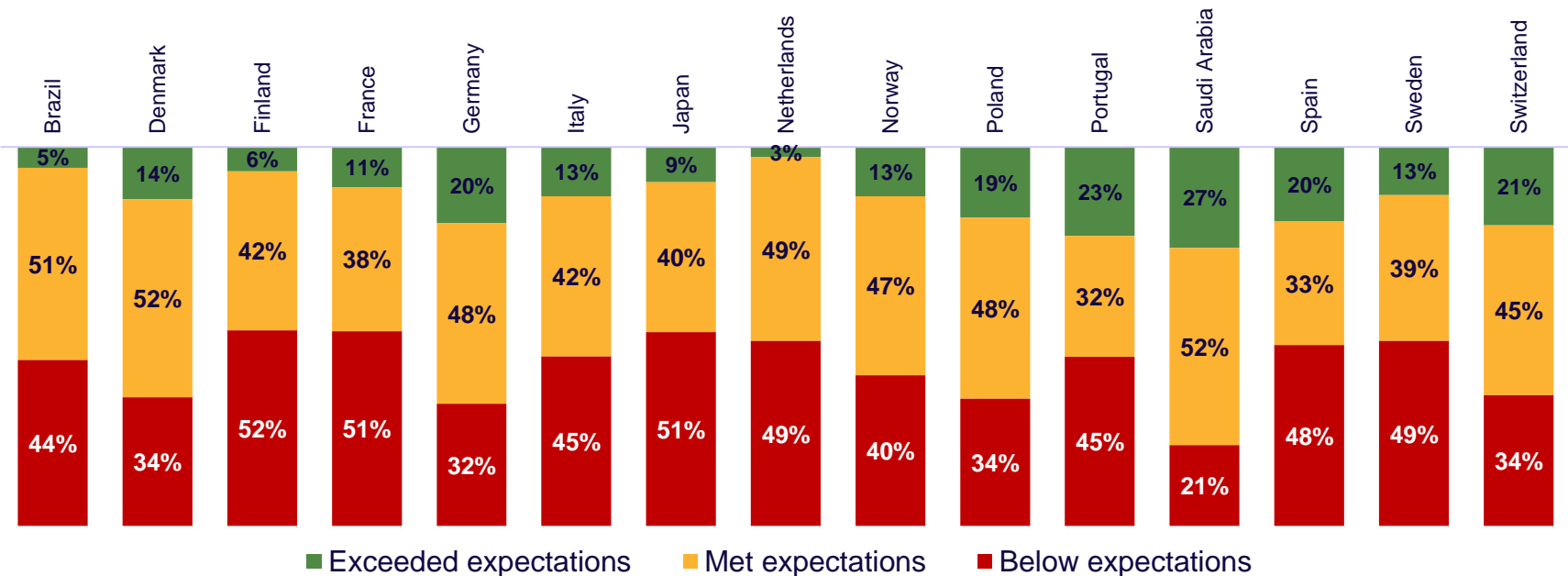
Source: CAA Passenger Study 2015, Q: "Did the following exceed, meet or fall below your expectations?"

Base: Total = 4,346 leisure visitors. "Ease of driving" only relevant to 603 respondents. "Signs and information for visitors in your own language" score is among visitors from non English speaking countries.

Signs and info in own language

The provision of signs and information in different languages is an area that falls short of expectations for many non-English speaking markets.

Over half of visitors from China, Finland, France and Japan, and close to half from Sweden, Spain and the Netherlands felt that their expectations were not met. This is an area that could be improved upon for future visitors.



Source: CAA Passenger Study 2015, Q: "Did the following exceed, meet or fall below your expectations?"

Base: Total = 2,720 leisure visitors

Overall enjoyment of visit

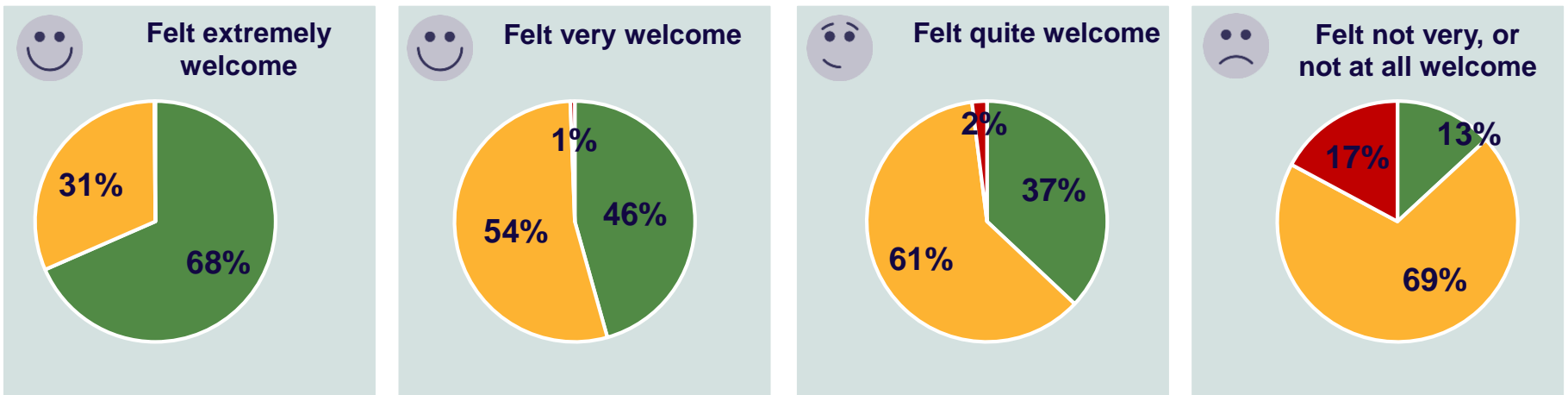
By level of welcome

Whilst the proportion of visitors who felt unwelcome during their visit to the UK is very small, the level of welcome felt does have a direct impact on the overall enjoyment of their visit.

Those who felt extremely or very welcome during their trip are more likely to say that the overall enjoyment they felt exceed their expectations, compared to those who felt 'quite welcome'. Two thirds of those who did not feel welcome said that their overall enjoyment met expectations, but a sixth said that it fell below what they had hoped.

Did your overall enjoyment of your visit...?

■ Exceed expectations ■ Meet expectations ■ Fall below expectations









Expectations

Americas market highlights

The friendliness of British exceeded expectations for many in the USA (60%) and Canada (45%). However, a higher proportion (22%) than average of those in Brazil felt this did not meet their expectations.

Fewer than half of those from Brazil said that their overall enjoyment exceeded expectations, and the lack of signs or information in Portuguese may have also had an impact here.

Overall enjoyment of the trip was just above the global average for visitors from the USA and Canada, and just below for Brazilian visitors.

USA	
Overall enjoyment = 56% exceeded expectations	
 % Exceeded	 % Fell below
Friendliness of British 60% Quality of tourist attractions 58%	Ease of driving 15% Quality of accommodation 8%
Canada	
Overall enjoyment = 54% exceeded expectations	
 % Exceeded	 % Fell below
Quality of tourist attractions 62% Friendliness of British 45%	Weather 11% Quality of accommodation 8% Ease of finding food you wanted 7%
Brazil	
Overall enjoyment = 47% exceeded expectations	
 % Exceeded	 % Fell below
Ease of travel 57% Quality of tourist attractions 44%	Signs/info in own language 44% Friendliness of British 22%



Expectations



Nordic market highlights



Overall enjoyment of the trip exceeded expectations for over half in Denmark and Sweden. Enjoyment was below average for Norway, although other areas did exceed expectations for this market, such as friendliness of British and English signs and information.

The quality of tourist attractions was a key driver of exceeding expectations for travellers from Denmark and Sweden.

For Denmark and Sweden, signs and information in native languages fell below expectations for many, and the quality of accommodation was not up to expectations for some visitors from Norway and Denmark.

Norway	
Overall enjoyment = 43% exceeded expectations	
 % Exceeded	 % Fell below
Friendliness of British 56% Signs and info in English 51%	Signs/info in own language 13% Quality of accommodation 14%

Denmark	
Overall enjoyment = 55% exceeded expectations	
 % Exceeded	 % Fell below
Quality of tourist attractions 68% Friendliness of British 58%	Signs/info in own language 34% Quality of accommodation 12%

Sweden	
Overall enjoyment = 56% exceeded expectations	
 % Exceeded	 % Fell below
Quality of tourist attractions 51% Friendliness of British 49%	Signs/info in own language 49% Weather 13%









Expectations

Europe market highlights (1/2)

Overall trip enjoyment exceeded expectations for two thirds of visitors from Ireland, more than any other European nation surveyed. There was high positivity from Ireland across many attributes; the weather was the only area to fall below expectations for as much as 10%.

Many from France felt that the food and also the weather were issues and around half said that signs/information provided in French were below expectations.

For all non English-speaking European markets the provision of information in multiple languages often fell below expectations, and for Italy and especially Germany the quality of accommodation was not up to standard for some.

France	
Overall enjoyment = 48% exceeded expectations	
 % Exceeded	 % Fell below
Quality of tourist attractions 56% Friendliness of British 56%	Signs/info in own language 51% Weather 22% Ease of finding food 20%
Germany	
Overall enjoyment = 52% exceeded expectations	
 % Exceeded	 % Fell below
Friendliness of British 60% Quality of tourist attractions 59%	Signs/info in own language 32% Quality of accommodation 19%
Ireland	
Overall enjoyment = 66% exceeded expectations	
 % Exceeded	 % Fell below
Quality of tourist attractions 59% Ease of travel 48%	Weather 10% Customer service 5%
Italy	
Overall enjoyment = 51% exceeded expectations	
 % Exceeded	 % Fell below
Quality of tourist attractions 39% Ease of travel 37%	Signs/info in own language 45% Weather 12% Quality of accommodation 12%

Expectations

Europe market highlights (2/2)

Overall, the friendliness of the British, and the quality of tourist attractions were most likely to have exceeded expectations amongst travellers from these markets. Again, the provision of signs in visitors' native languages is an issue for all non-English speaking European markets. Ease of travel, quality of accommodation and weather are also cited by some as areas that fall below expectations.

Netherlands

Overall enjoyment = 48% exceeded expectations



% Exceeded



% Fell below

Friendliness of British 53%
Signs and info in English 52%

Signs/info in own language 49%
Quality of accommodation 6%
Ease of travel 6%

Poland

Overall enjoyment = 59% exceeded expectations



% Exceeded



% Fell below

Friendliness of British 68%
Quality of tourist attractions 68%

Signs/info in own language 34%
Weather 8%

Spain

Overall enjoyment = 51% exceeded expectations



% Exceeded



% Fell below

Quality of tourist attractions 67%
Friendliness of British 52%

Signs/info in own language 48%
Ease of travel 17%

Switzerland

Overall enjoyment = 51% exceeded expectations



% Exceeded



% Fell below

Quality of tourist attractions 65%
Friendliness of British 59%

Signs/info in own language 34%
Ease of travel 11%
Weather 11%

Expectations

Rest of world market highlights

Ease of travelling throughout the UK exceeded expectations for two thirds from New Zealand and half from Australia. The weather was a positive for many from India, matching findings in other recent VisitBritain research.

On the negative side, signs/info in own language was an issue for a fifth from India, and the ease of finding food they wanted a negative for 10% - this was also an issue for 20% from New Zealand.

Some Australian travellers found the ease of driving below their expectations.

A majority of Saudi visitors rated tourist attractions and customer service in accommodation better than expectations.

Australia

Overall enjoyment = **52%** exceeded expectations



% Exceeded



% Fell below

Quality of tourist attractions **58%**

Ease of travel **49%**

Ease of driving **10%**

Weather **8%**

India

Overall enjoyment = **42%** exceeded expectations



% Exceeded



% Fell below

Weather **44%**

Quality of tourist attractions **42%**

Signs/info in own language **20%**

Ease of finding food **10%**

New Zealand

Overall enjoyment = **49%** exceeded expectations



% Exceeded



% Fell below

Friendliness of British **77%**

Ease of travel **66%**

Ease of finding food **20%**

Customer service **5%**

Saudi Arabia

Overall enjoyment = **50%** exceeded expectations



% Exceeded



% Fell below

Quality of tourist attractions **61%**

Customer service in accom **61%**

Signs/info in own language **21%**

Weather **8%**

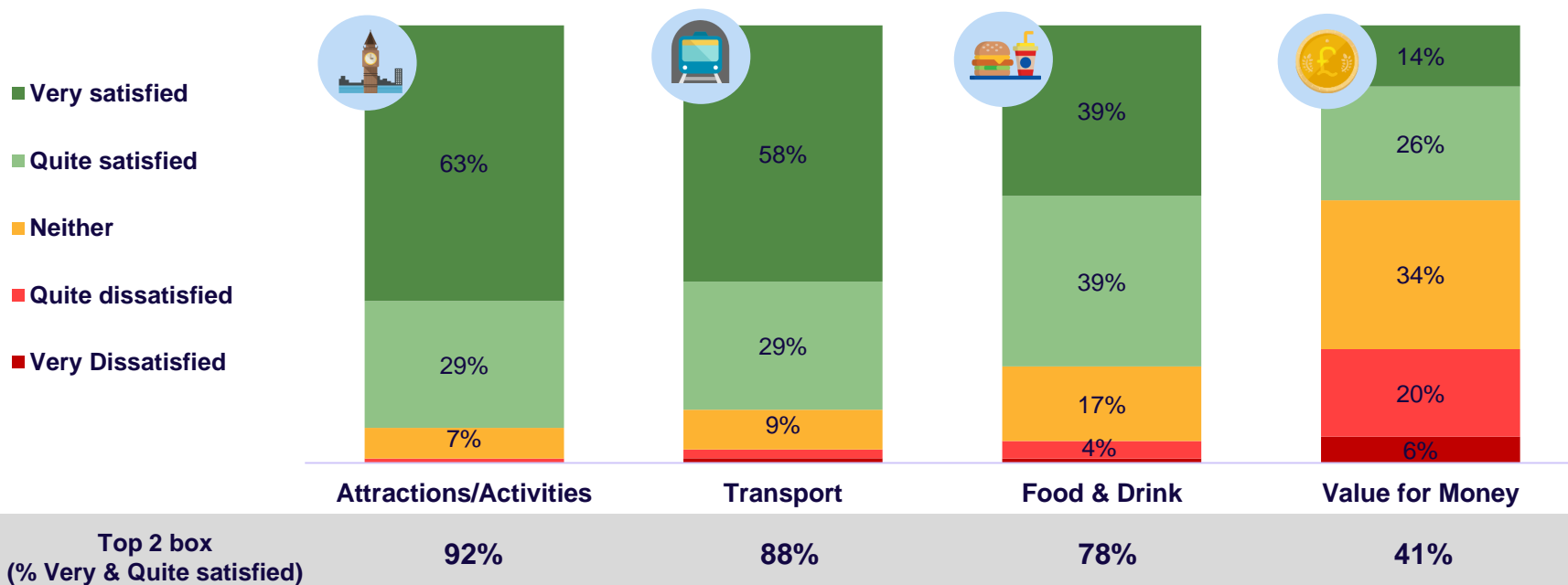
Satisfaction with different aspects of a trip to Britain



Overall Visitor Satisfaction

Of the 4 main trip elements included in the survey, Britain's **attractions and activities** drove the strongest satisfaction scores with over 9 in 10 departing visitors satisfied and almost two thirds (63%) 'very satisfied' with their experience. Britain's **public transport** was another trip element that delivered similar overall positive satisfaction levels amongst travellers, although with a slightly lower 'very satisfied' score (58%). Satisfaction with British **food & drink** was generally positive (78% satisfied) with 39% 'very satisfied', placing it behind attractions and public transport. **Value for money** proved the most disappointing trip element amongst departing visitors, with over a quarter being 'quite' or 'very dissatisfied', although this research was conducted before the sharp fall in the value of the pound in mid-2016.

Satisfaction with the following aspects during trip to UK

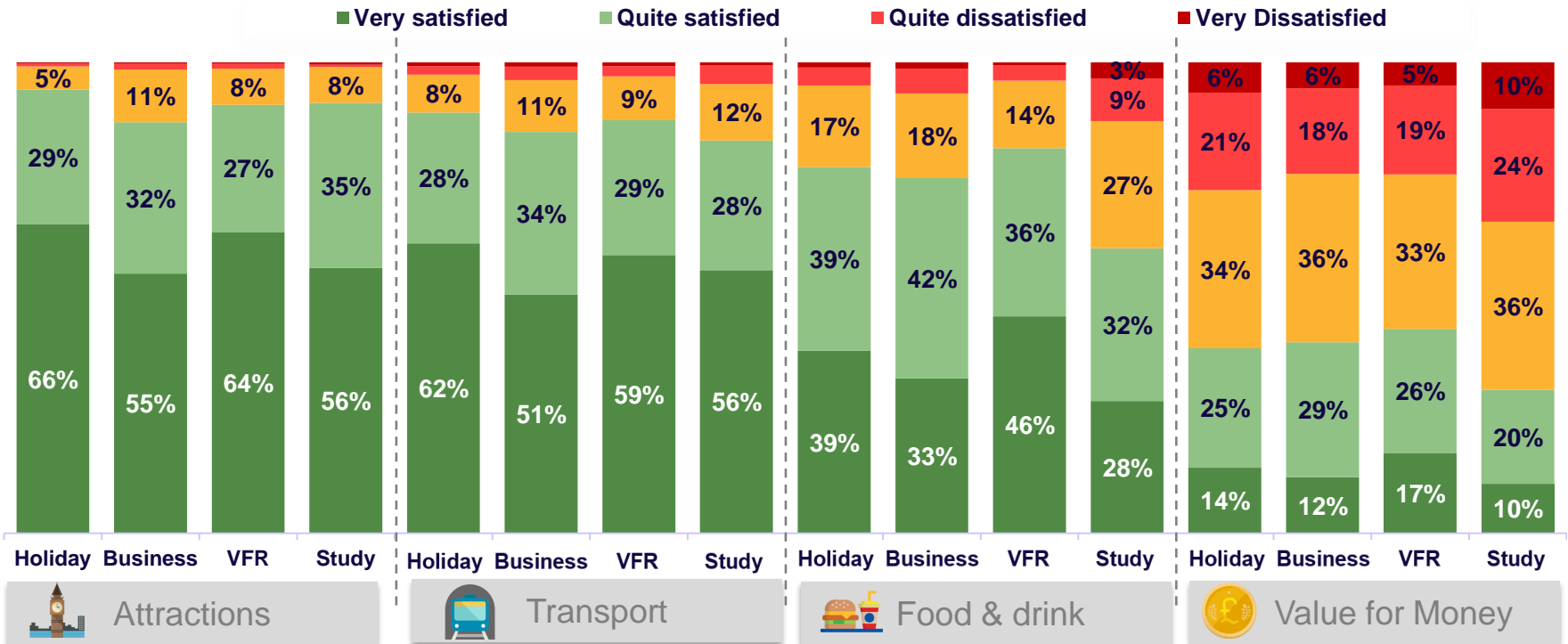


Source: International Passenger Survey 2015, Q: "How satisfied were you with your visit to the UK for Food & Drink, Public Transport, Attractions/activities, Value for Money?". On a scale of 1-5. Base: Visitors staying 1+ night in Britain, excludes UK nationals (expats) n=35,593

Visitor satisfaction

Trip Purpose

Visitors who have primarily visited Britain to **visit friends and relatives (VFR)** have a higher propensity to be very satisfied with value for money and with food & drink – this score likely to be driven by local and personal recommendations for good eating and drinking choices. **Holiday visitors** are particularly satisfied by Britain's attractions and public transport. **Business visitors** have the lowest levels of satisfaction, significantly under-indexing across all categories except for value for money.

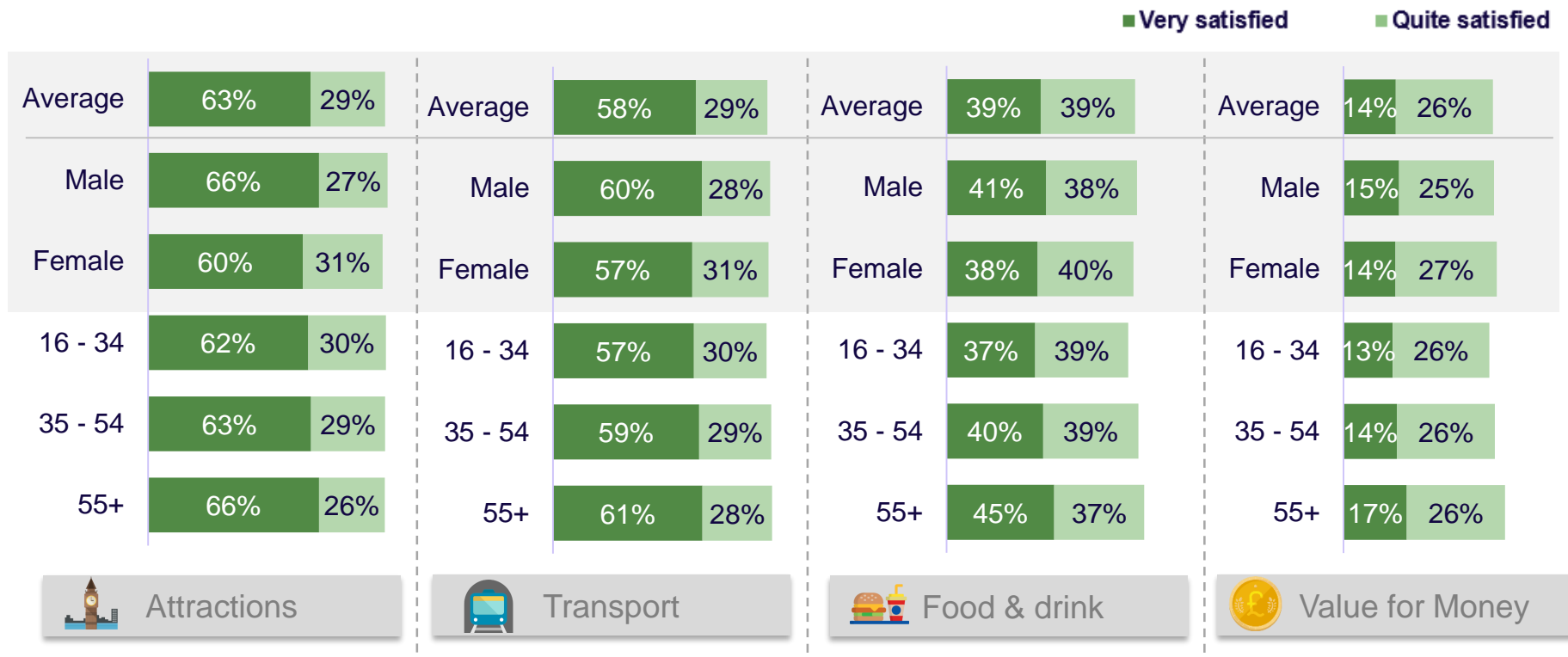


Source: International Passenger Survey 2015, Q: "How satisfied were you with your visit to the UK for Food & Drink, Public Transport, Attractions/activities, Value for Money?". On a scale of 1-5. Base: Visitors staying 1+ night in Britain, excludes UK nationals (expats) n=35,593

Visitor satisfaction

Gender and Age

Men are slightly more likely to be very satisfied generally with Britain's trip elements, especially for attractions. Satisfaction levels also tend to be linked to **age**, with the proportion of those reporting themselves very satisfied increasing with visitor age across all four dimensions.



Visitor satisfaction

Markets

There are a few markets that generally exceed the global average of satisfaction levels for all listed trip elements in Britain, including the Americas (**USA, Brazil, Canada**) and **Saudi Arabia**. Conversely, several European markets, such as **France, Germany, Spain, Netherlands** and **Belgium**, report a lower than average level of satisfaction across the board. Some other long-haul markets such as **Japan** and **Hong Kong** also give lower satisfaction scores.

While the **Chinese** give Britain above-average score for value for money, and their experience of attractions and activities is favourable, their satisfaction levels of Britain's public transport and food & drink are lower than average. **Italy's** scores are also mixed, reporting low satisfaction with Britain's food & drink and value for money but above average for public transport and attractions.

Level of Satisfaction (% very satisfied)

	AUS	BELG	BRAZ	CAN	CHI	DEN	FRA	GER	HK	INDIA	IRE	ITA	JAP	NETH	NZ	NOR	POL	POR	RUS	SAU	SING	SAF	S.K.	SPA	SWE	SWI	TUR	UAE	USA	TOT
Attractions	67%	51%	78%	70%	64%	67%	52%	60%	49%	65%	66%	68%	59%	51%	61%	67%	68%	75%	80%	73%	55%	70%	71%	61%	61%	57%	65%	67%	74%	63%
Transport	62%	50%	79%	68%	51%	57%	47%	51%	33%	70%	64%	71%	38%	47%	69%	55%	63%	64%	65%	74%	48%	72%	63%	52%	54%	46%	67%	67%	69%	58%
Food & Drink	43%	29%	55%	52%	34%	44%	29%	34%	30%	50%	50%	26%	34%	33%	49%	47%	40%	31%	56%	60%	38%	55%	33%	25%	36%	41%	41%	60%	53%	39%
Value for Money	15%	10%	15%	15%	22%	25%	11%	7%	12%	20%	18%	9%	12%	11%	16%	26%	18%	10%	25%	28%	11%	14%	24%	8%	15%	17%	14%	25%	20%	14%

Visitor satisfaction

By region

Here we look at how satisfaction with different trip elements varies by which region of the UK was visited, among those visiting for holidays only. As some visitors stayed in multiple regions, the data is based on the region each visitor first stayed in.

Scotland is a clear winner when it comes to satisfaction with food and drink and also outperforms the UK average for value for money.

London scores highest for attractions and public transport amongst holiday visitors, while value for money is below average.

There is a clear North-South divide on value for money perceptions with the North East, North West and Yorkshire, as well as Scotland and Wales, above average.

Level of Satisfaction (% very satisfied)

Market	Attraction/ Activities	Public Transport	Food & Drink	Value for money
UK Average	65%	62%	39%	14%
LONDON	68%	64%	39%	13%
NORTH EAST	52%	58%	34%	20%
NORTH WEST	63%	54%	41%	22%
YORKSHIRE	62%	47%	35%	22%
WEST MIDLANDS	62%	50%	40%	13%
EAST MIDLANDS	62%	62%	33%	18%
EAST OF ENGLAND	56%	52%	36%	12%
SOUTH WEST	50%	43%	36%	11%
SOUTH EAST	53%	51%	31%	10%
SCOTLAND	66%	61%	48%	23%
WALES	54%	48%	35%	23%

Holiday Visits Only



Recommending Britain

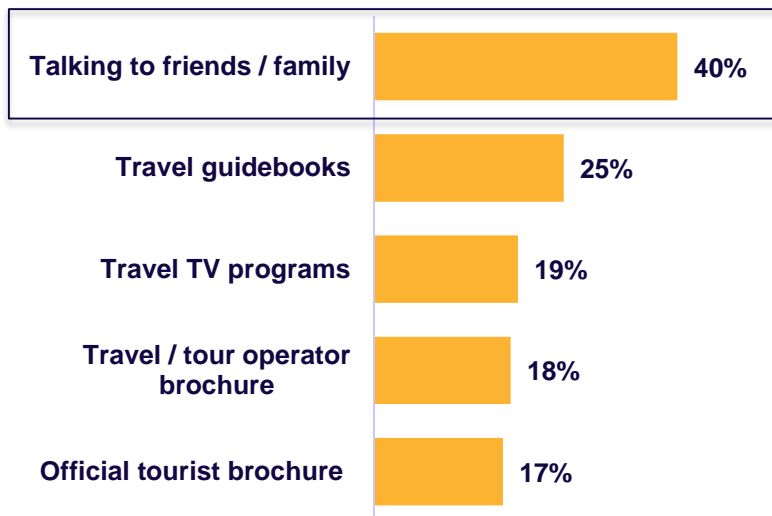


The Influence of Recommendation

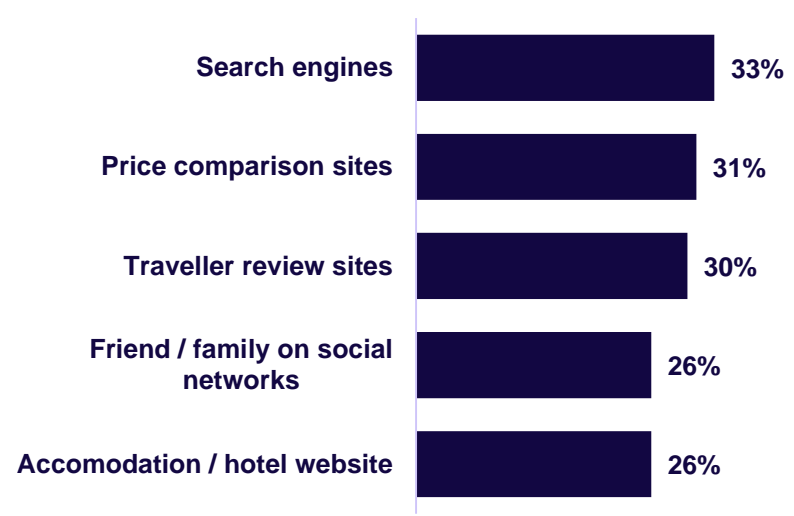
A survey commissioned by VisitBritain in 2016 found that globally, the strongest influence for destination choice is word of mouth recommendation, with talking to friends, family or colleagues key for 40% of considerers and visitors to Britain. The power of recommendation from those you trust is the top influencer across all age groups and for both men and women.

The likelihood for visitors of Britain to recommend a visit to the UK to friends and family is therefore an important metric to measure and understand.

Top 5 offline influences



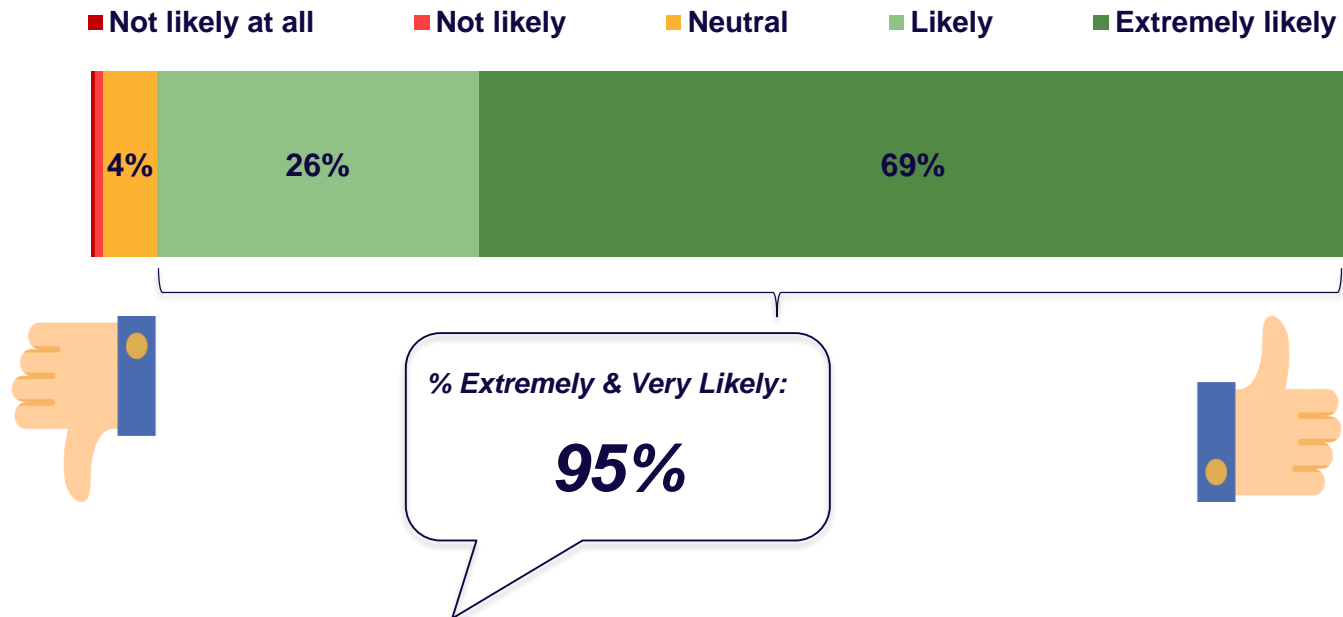
Top 5 online influences



Recommending Britain

When asked on departure, over two thirds of visitors in 2015 said they were 'extremely likely' to recommend a visit to Britain to their friends and family, while a further 26% said they were 'likely' to recommend a visit. The combined positive intention to recommend equates to 95%, a very favourable result overall.

Visitors' Likelihood to Recommend Britain



Recommending Britain

Market highlights

Visitors from long-haul markets are more likely to strongly recommend Britain, with 3 in 4 saying they are likely to do so compared to an average score of 67% from short-haul markets.

Similarly, visitors from markets which have English as its primary language have a higher likelihood to strongly recommend Britain to their peers (74%), compared to non-English speaking countries (67%).



Source: International Passenger Survey 2015, Q: "How likely are you to recommend a visit to the UK to friends and family?"

Base: Visitors staying 1+ night in Britain, excludes UK nationals (expats) n=35,593. Short Haul = All European markets, Long Haul = Rest of world, English Speaking countries = AUS, NZ, SAF, USA, CAN and IRE

Recommending Britain

Market highlights (holiday visitors only)

In terms of nations who were most likely to recommend a visit to the UK, long-haul markets Brazil, South Africa and USA came out on top with the highest proportions saying they were extremely likely to recommend, followed by Norway and Russia.

There were only a very small proportion of respondents that would not consider recommending Britain at some level. Holiday visitors from Malaysia, Hong Kong, Belgium and France were less likely to say they would be extremely likely to recommend a visit to the UK, but even here well over half would do so.

	AUS	BEL	BRA	CAN	CHI	DEN	FRA	GER	HK	IND	IRE	ITA	JAP	MAL	NET	NZ	NOR	POL	POR	RUS	SAU	SGP	SAF	KOR	SPA	SWE	SWI	TUR	UAE	USA	TOT
Extremely Likely	73%	61%	87%	72%	77%	75%	60%	65%	59%	76%	74%	74%	68%	54%	65%	68%	80%	64%	79%	80%	75%	70%	81%	75%	69%	72%	73%	67%	78%	81%	71%
Very likely	23%	36%	11%	26%	19%	23%	36%	30%	35%	21%	18%	23%	26%	36%	31%	22%	17%	32%	19%	11%	20%	21%	16%	18%	29%	24%	26%	33%	18%	17%	26%
Neutral	4%	3%	1%	1%	3%	2%	3%	4%	4%	3%	7%	2%	1%	6%	4%	9%	2%	3%	3%	9%	4%	6%	3%	2%	2%	3%	1%	0%	4%	1%	3%
Not likely	1%	0%	0%	1%	0%	0%	1%	1%	1%	0%	1%	0%	4%	0%	0%	0%	1%	0%	0%	0%	0%	2%	0%	2%	0%	1%	0%	0%	0%	0%	0%
Not likely at all	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	1%	0%	3%	0%	1%	0%	1%	0%	0%	1%	2%	0%	3%	0%	0%	0%	0%	0%	0%	0%

Recommending Britain

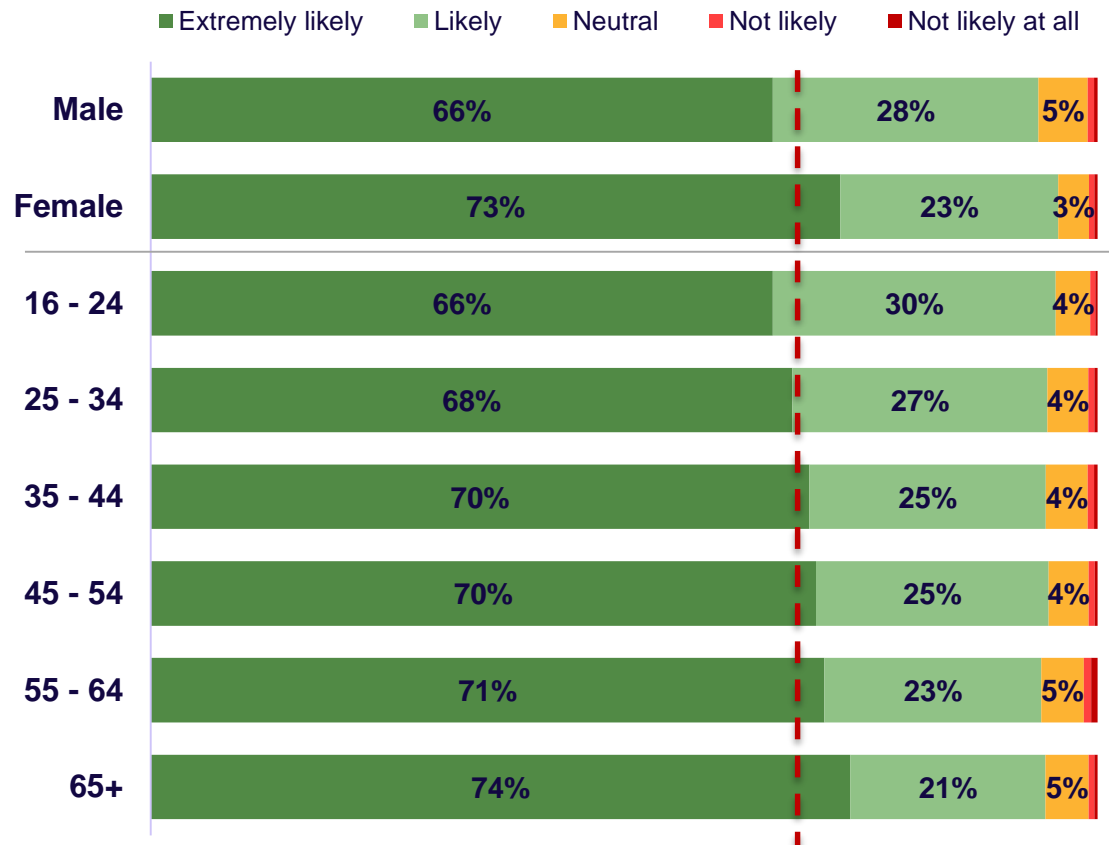
Age and gender

While over 90% of visitors to Britain, across all gender and age splits, are likely to recommend a visit, some interesting variations can be seen amongst those who had the *strongest* propensity to recommend.

Women are significantly more likely than men to strongly recommend Britain to friends and family (73% vs 66%). This is true for women travelling for either leisure or for business.

There is also a link between age and recommendation. The older the visitor, the more likely they are to strongly recommend a visit to their friends and family.

Recommendation by age and gender



Source: International Passenger Survey 2015, Q: "How likely are you to recommend a visit to the UK to friends and family?"

Base: Visitors staying 1+ night in Britain, excludes UK nationals (expats) n=35,593

UK average:
69%

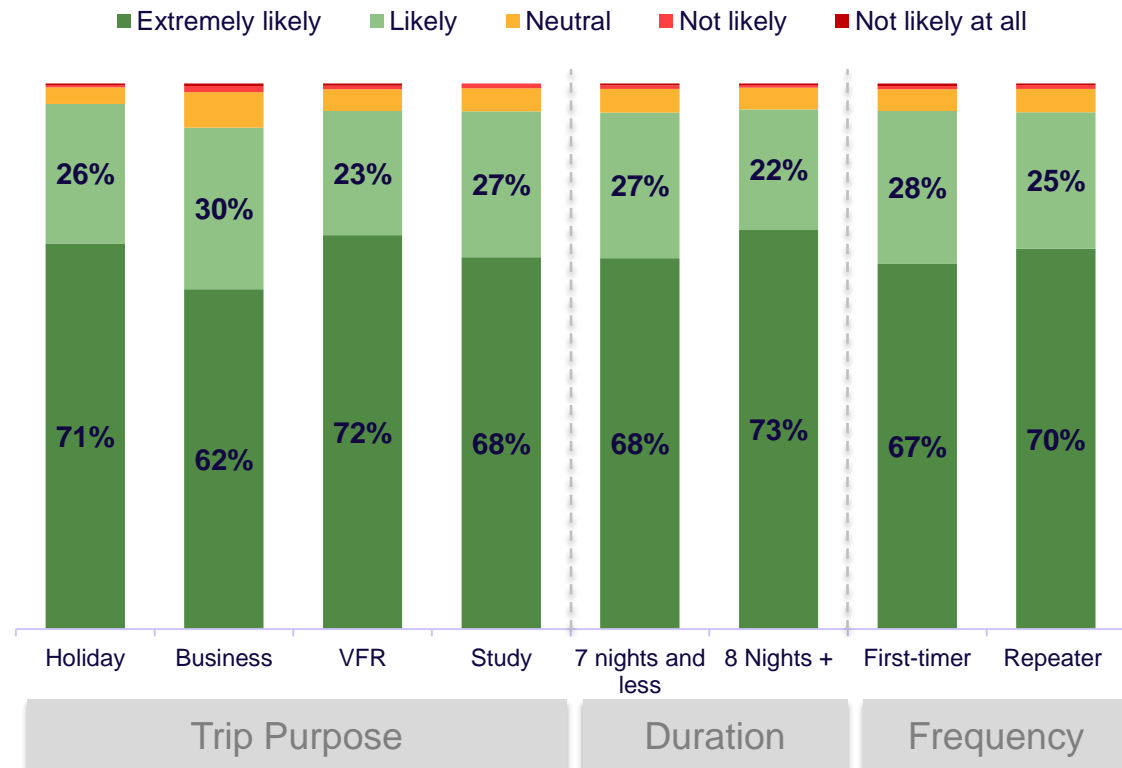
Recommending Britain

Trip Purpose, Duration and Frequency of travel

Those who visited Britain for VFR (72%) or holiday (71%) purposes have a higher propensity to say that they are extremely likely to recommend Britain. Those visiting Britain for business are less likely to recommend Britain overall (92% vs UK average of 95%) and the extremely likely scores drops significantly to 62% amongst this group.

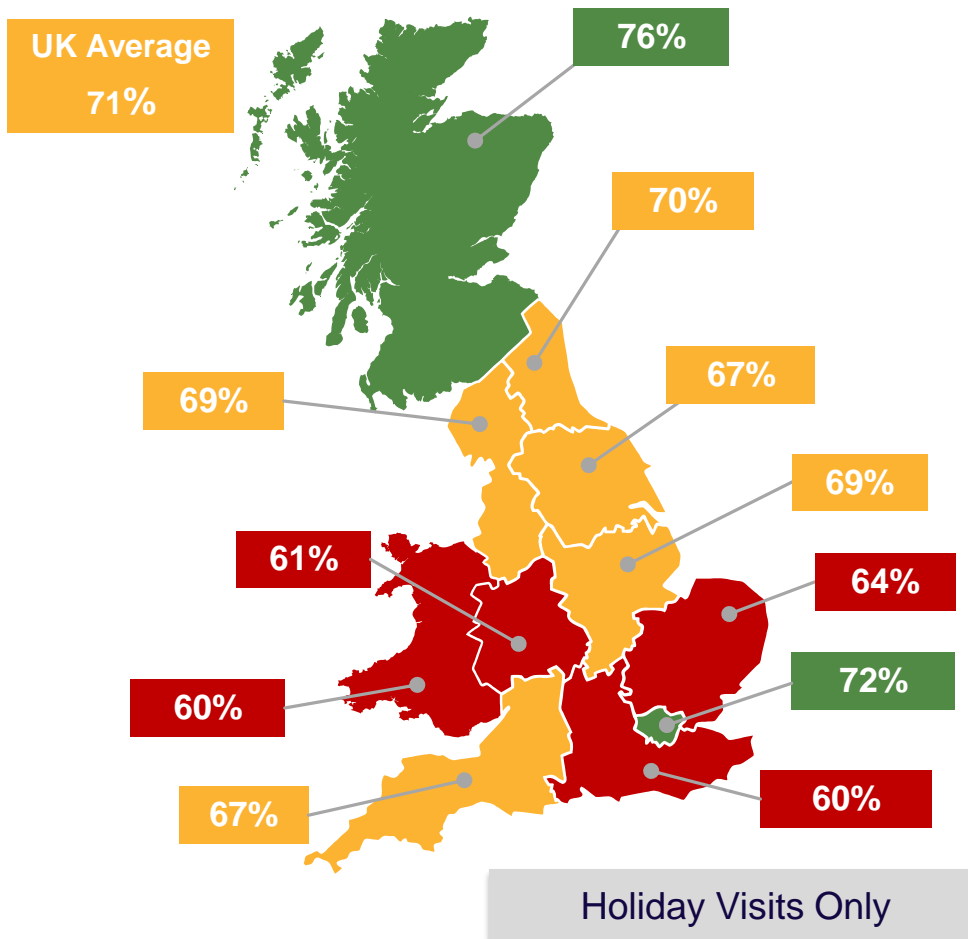
The longer visitors spend in Britain (on both leisure and business trips) the stronger the likelihood they will recommend a visit to friends and family (8+ nights: 73% vs <7 nights: 68%). The same is true of for those that have visited Britain on more than one occasion in the last 10 years.

Likelihood to recommend Britain



Recommendation by Region

% who are extremely likely to recommend, by region visited



This map shows how propensity to recommend Britain varies by which region of the UK was visited, among those visiting for holidays only. As some visitors stayed in multiple regions, the data is based on the region each visitor first stayed in. Visitors to Scotland (76%) and London (72%) gave the strongest recommendation scores amongst holiday visitors.



The Visitor Experience in Britain

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