

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. It is the second re-issue of Foresight 154, first released in September 2017, updated in May 2019 and the third revision in November 2020 after a revision of data from the ONS for the period 2009 – 2018.

VisitBritain 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 their satisfaction with four main trip elements: attractions & activities, public transport, food & drink and value for money. In 2017 VisitBritain asked a question about the likelihood of departing visitors to recommend a visit to Britain to friends and family and a question on how welcome they felt on their trip. This analysis includes insights from all of these questions.

The Civil Aviation Authority (CAA) conducts a passenger survey among leisure visitors at UK airports each year. In 2015 the survey was conducted at the following 5 UK airports, Gatwick, Heathrow, Luton, Stansted and Manchester. VisitBritain sponsored a question to visitors about how different trip elements met their expectations.

Summary – Welcome & Recommendation

Welcome

- Overall, visitors to the UK in 2017 felt a high level of welcome during their visit
 - 97% said they felt welcome or very welcome, with 82% saying they felt very welcome
 - Amongst those who had the highest proportion who felt very welcome were Brazilian and American visitors
 - Visitors to Scotland felt the most welcome and London the least

Recommendation

- Overall, 97% of visitors to the UK are likely to recommend Britain to friends and family
 - 82% say they are ‘extremely likely’ to recommend a visit to Britain to their friends and family
 - Women are more likely to recommend Britain than 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 holiday or VFR purposes while those on business or for study purposes are less likely to recommend a visit to Britain

Summary – Satisfaction & Expectations

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 59% very satisfied with public transport.
- Overall satisfaction of Britain's food & drink was 79% although a lower 42% were very satisfied. Value for money proved the most disappointing of these trip elements (41% were satisfied).

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.

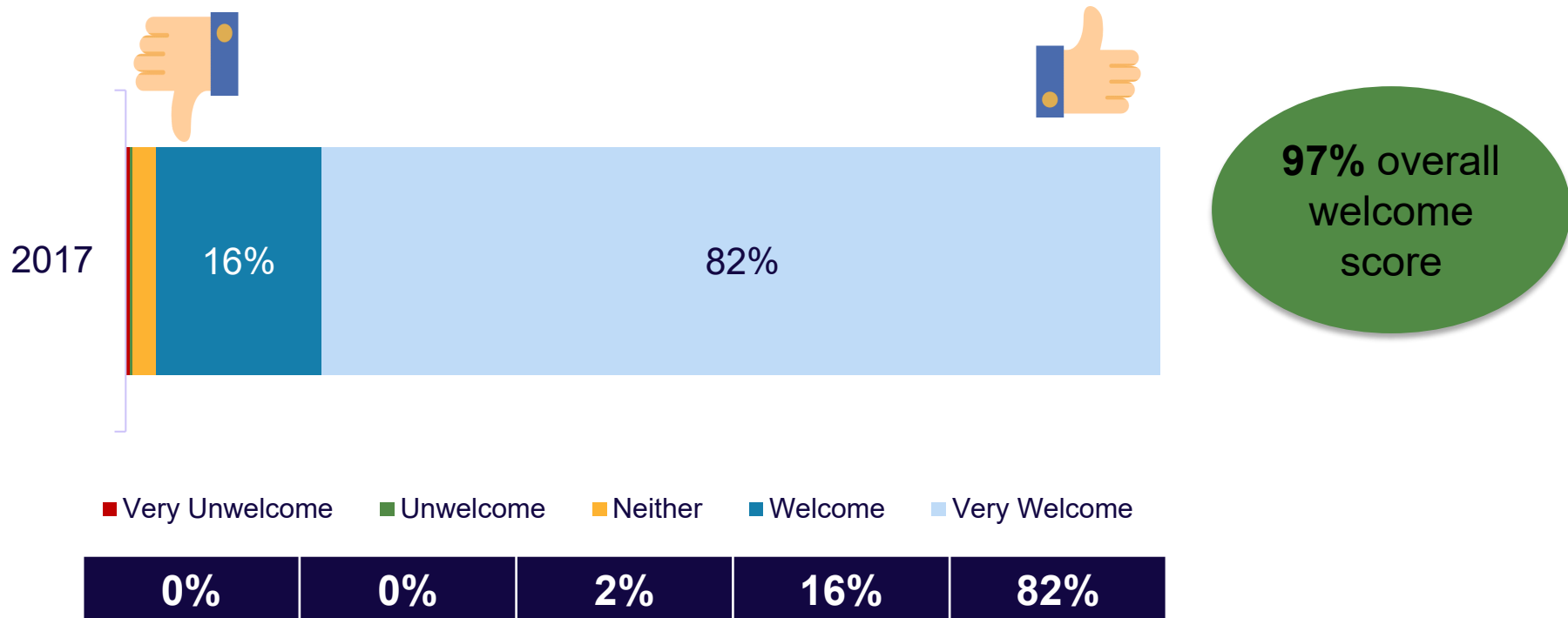


Britain's welcome



Britain's welcome

Overall, visitors to Britain are experiencing high levels of welcome; over 8 in 10 visitors in 2017 felt 'very welcome' during their trip to Britain.

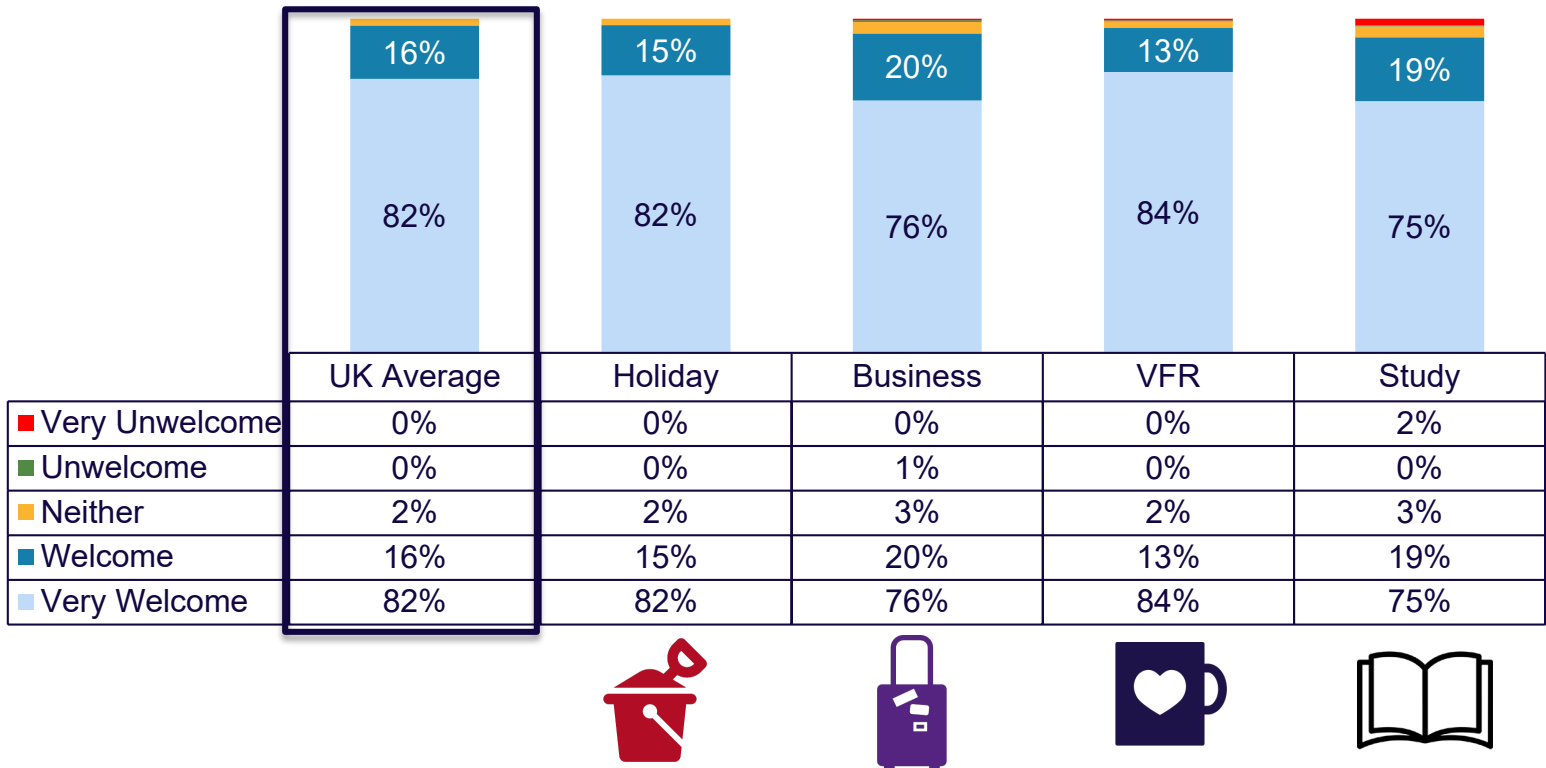


Source: International Passenger Survey 2017, Q: "Overall, how welcome did you feel in the UK?"

Base: Visitors staying 1+ night in Britain, excludes UK nationals (expats) and Don't know/refused responses n=27,730

Britain's welcome by Trip Purpose

Welcome was felt most strongly amongst those visiting friends and relatives, followed by those on holiday in Britain. Business visitors and those visiting for study were less likely to feel a strong sense of welcome during their visit to Britain.



Source: International Passenger Survey 2017, Q: "Overall, how welcome did you feel in the UK?"

Base: Visitors staying 1+ night in Britain, excludes UK nationals (expats) and Don't know/refused responses n=27,730

Britain's Welcome Market breakdown(1/2)

Holiday visits only

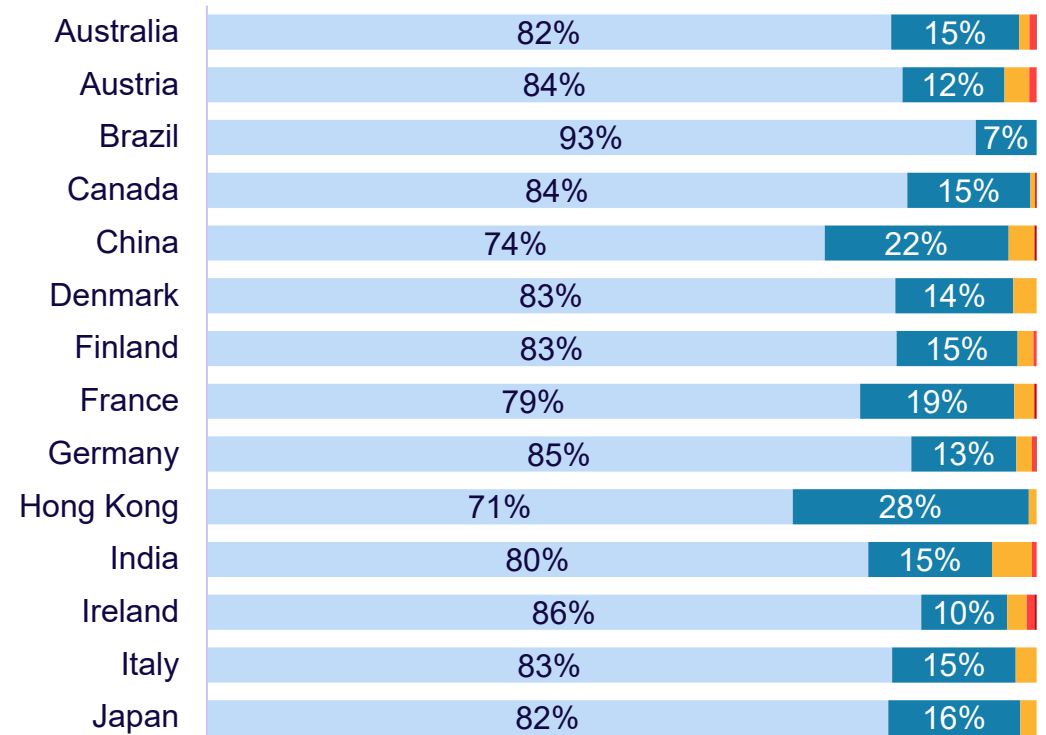


Among all markets there were very few who felt unwelcome during their trip to Britain. However, there were a few nations where there are lower levels of strong welcome – such as Portugal, Singapore, Hong Kong, Qatar and China.

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“How welcome did you feel in Britain?”

■ Very Welcome ■ Welcome ■ Neither ■ Unwelcome ■ Very Unwelcome



Source: International Passenger Survey 2017, Q: “Overall, how welcome did you feel in the UK?”

Base: Visitors staying 1+ night in Britain, excludes UK nationals (expats) and Don't know/refused responses n=27,730

Australia=522, Austria= 127, Brazil=162, Canada=267, China=206, Denmark=223, Finland=169, France=1023,

Germany=1302, India=218, Hong Kong= 114, Ireland=414, Italy=433, Japan=138

Britain's Welcome Market breakdown (2/2)

Holiday visits only

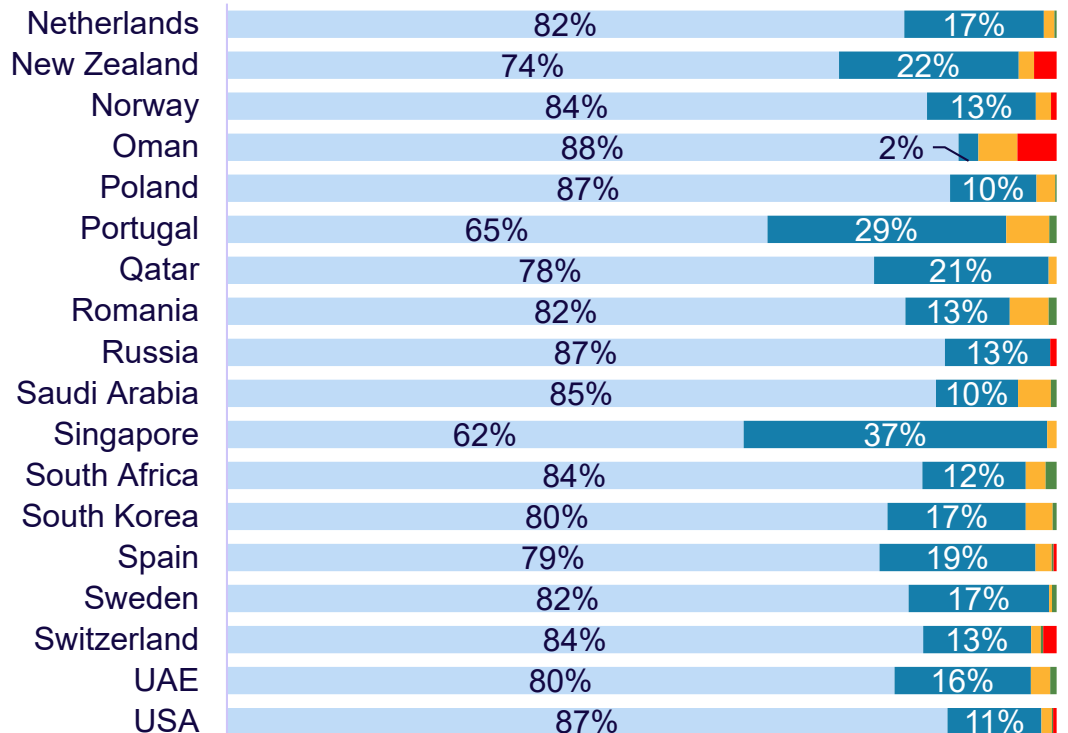


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In terms of nations who felt most welcome during their stay, Brazil, USA, Oman, Russia and Poland have the highest proportion who felt 'very welcome'.

"How welcome did you feel in Britain?"

■ Very Welcome ■ Welcome ■ Neither ■ Unwelcome ■ Very Unwelcome



Source: International Passenger Survey 2017, Q: "Overall, how welcome did you feel in the UK?"

Base: Visitors staying 1+ night in Britain, excludes UK nationals (expats) and Don't know/refused responses n=27,730
 Netherlands=753, New Zealand=63, Norway=196, Oman =25 Poland=130, Portugal=103, Qatar=49 Romania=91,
 Russia=82, Saudi Arabia=121, Singapore=70, South Africa=76, South Korea=94, Spain=544, Sweden=269,
 Switzerland=266, UAE=168, USA=1,914.

Britain's Welcome by region

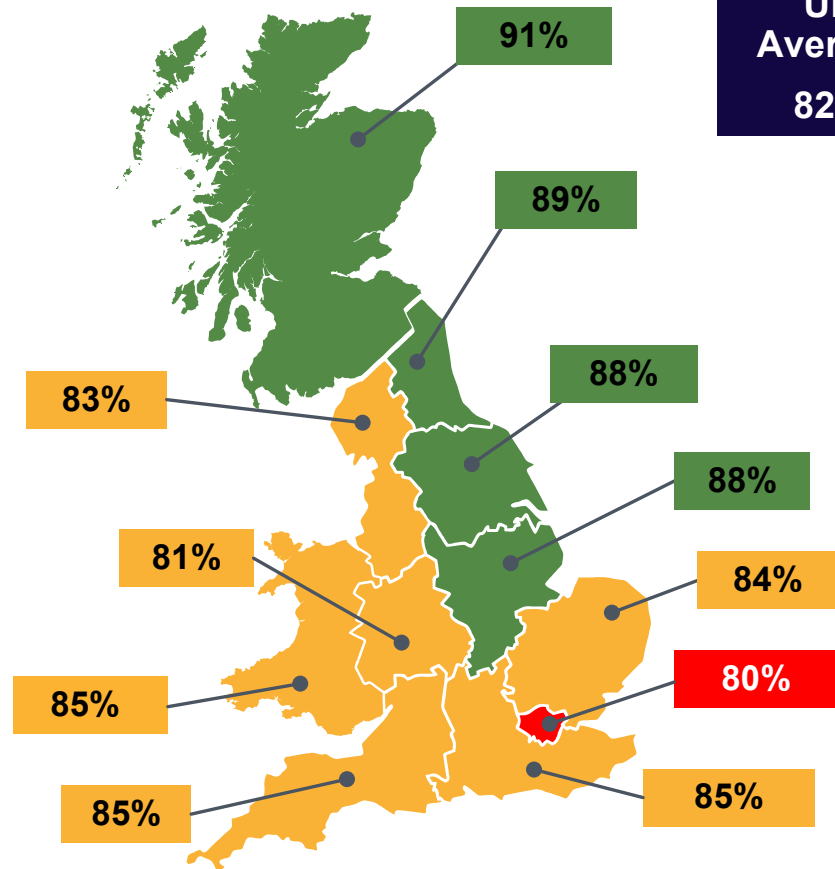
Holiday visits only



**UK
Average
82%**

Britain's capital underperforms for welcome, registering the lowest welcome score of all regions.

Scotland is the most welcoming area of Britain, according to those that have visited, followed by Britain's North Eastern regions (North East, Yorkshire and East Midlands)



Source: International Passenger Survey 2017, Q: "Overall, how welcome did you feel in the UK?"
 Base: Visitors staying 1+ night in Britain, excludes UK nationals (expats) and Don't know/refused responses.
 Holiday visitors only. Regional data amongst those who stayed in only one area. n=10,292

Expectations of trip elements

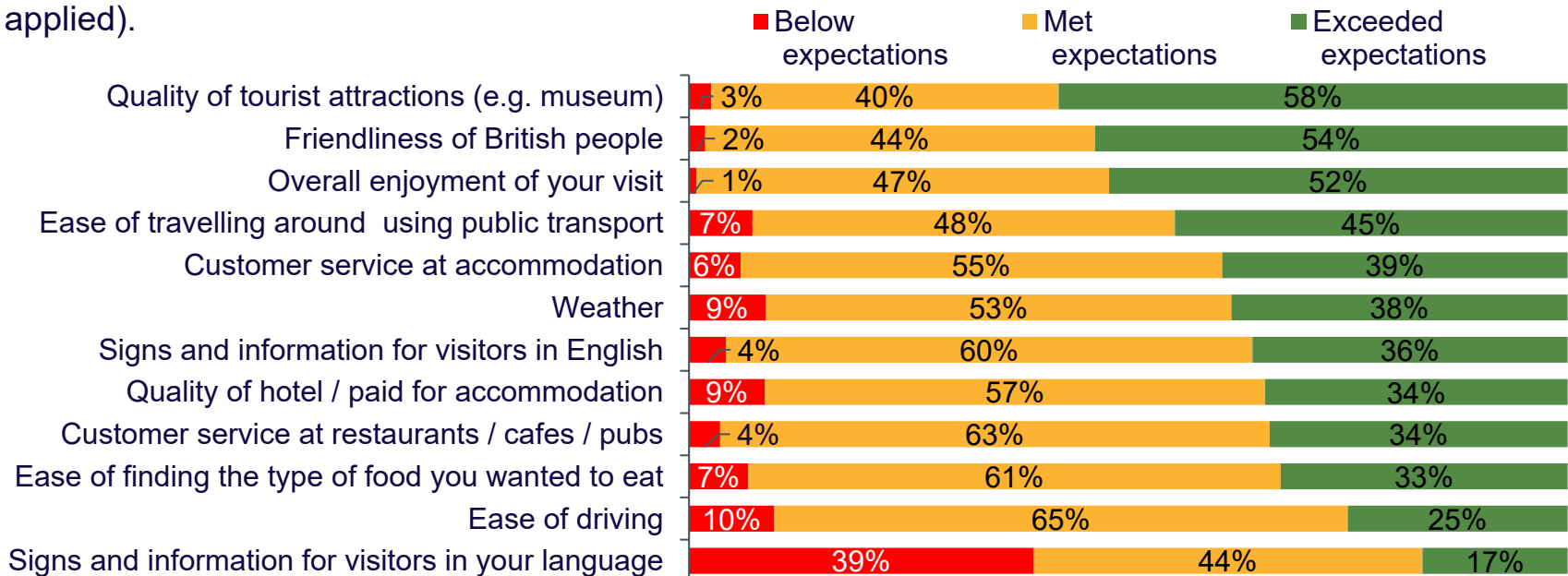


Expectations of visit attributes

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).



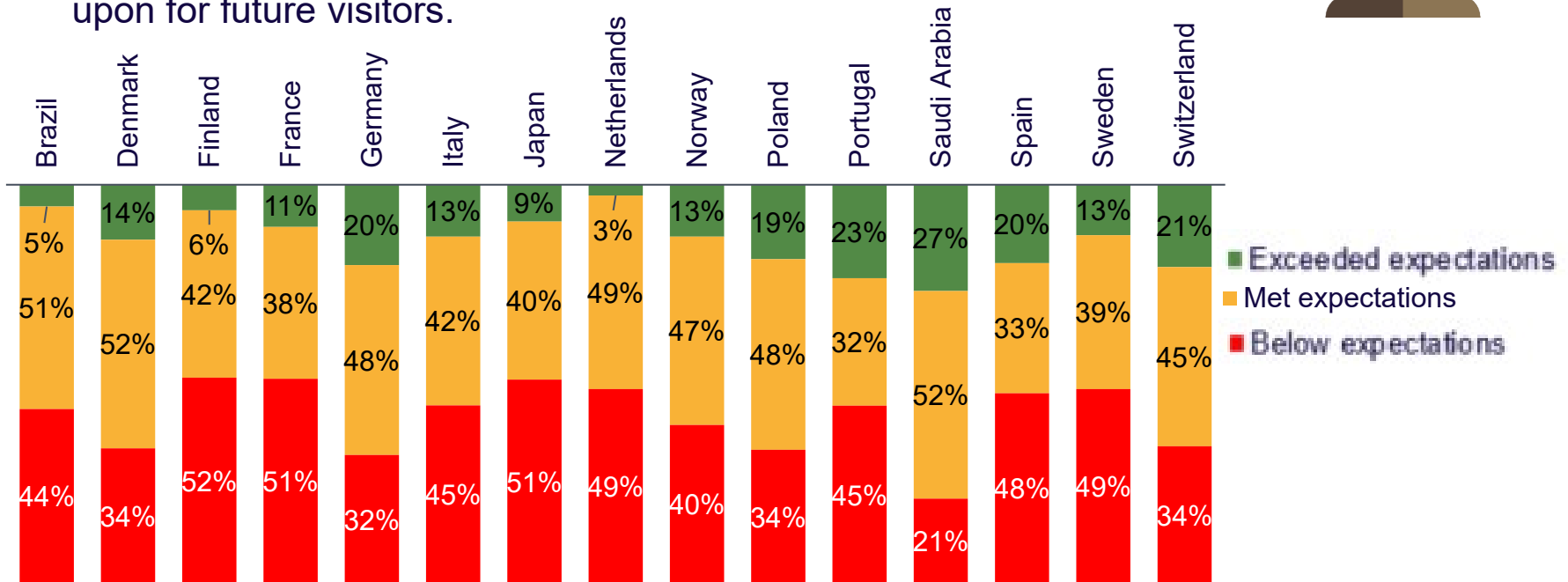
Source: CAA Passenger Study 2015, Q: "Did the following exceed, meet or fall below your expectations?"

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

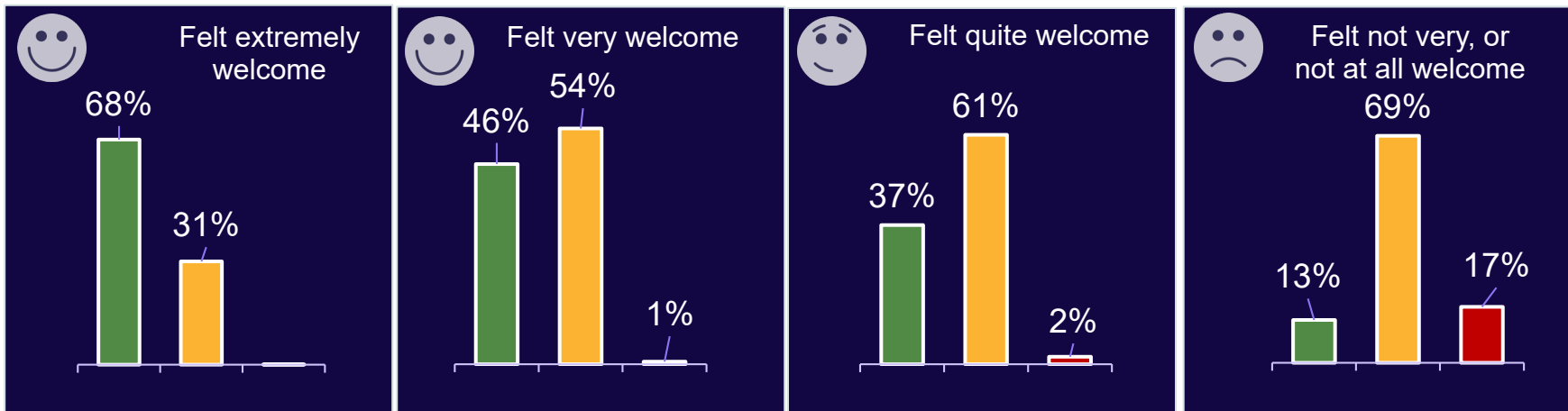
Overall enjoyment of visit by level of welcome

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



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

Base: leisure visitors. Felt extremely welcome=1,566, Felt very welcome=2165, Felt quite welcome=519,

Felt not very, or not at all welcome=52

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 (1/3)

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.

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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%

Expectations - Europe market highlights (2/3)

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.

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%
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%

Expectations - Europe market highlights (3/3)

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.

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 (1/2)

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.

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%

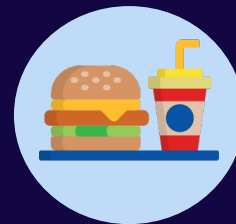
New Zealand	
Overall enjoyment = 49% exceeded expectations	
% Exceeded	% Fell below
Friendliness of British 77% Ease of travel 66%	Ease of finding food 20% Customer service 5%

Expectations - Rest of world market highlights (2/2)

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

Saudi Arabia	
Overall enjoyment = 50% exceeded expectations	
% Exceeded	% Fell below
Quality of tourist attractions 61% Customer service in accommodation 61%	Signs/info in own language 21% Weather 8%

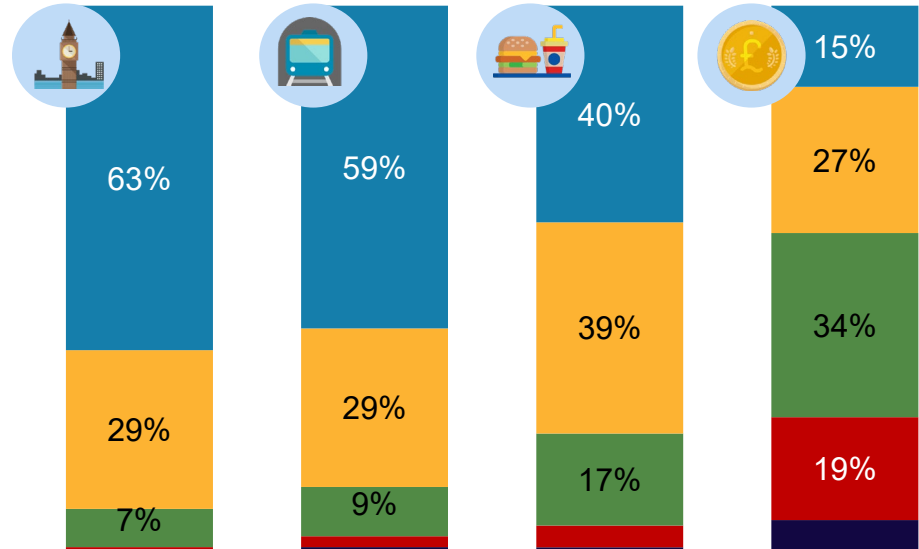
Satisfaction with different aspects of a trip to Britain



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 (59%). 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 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



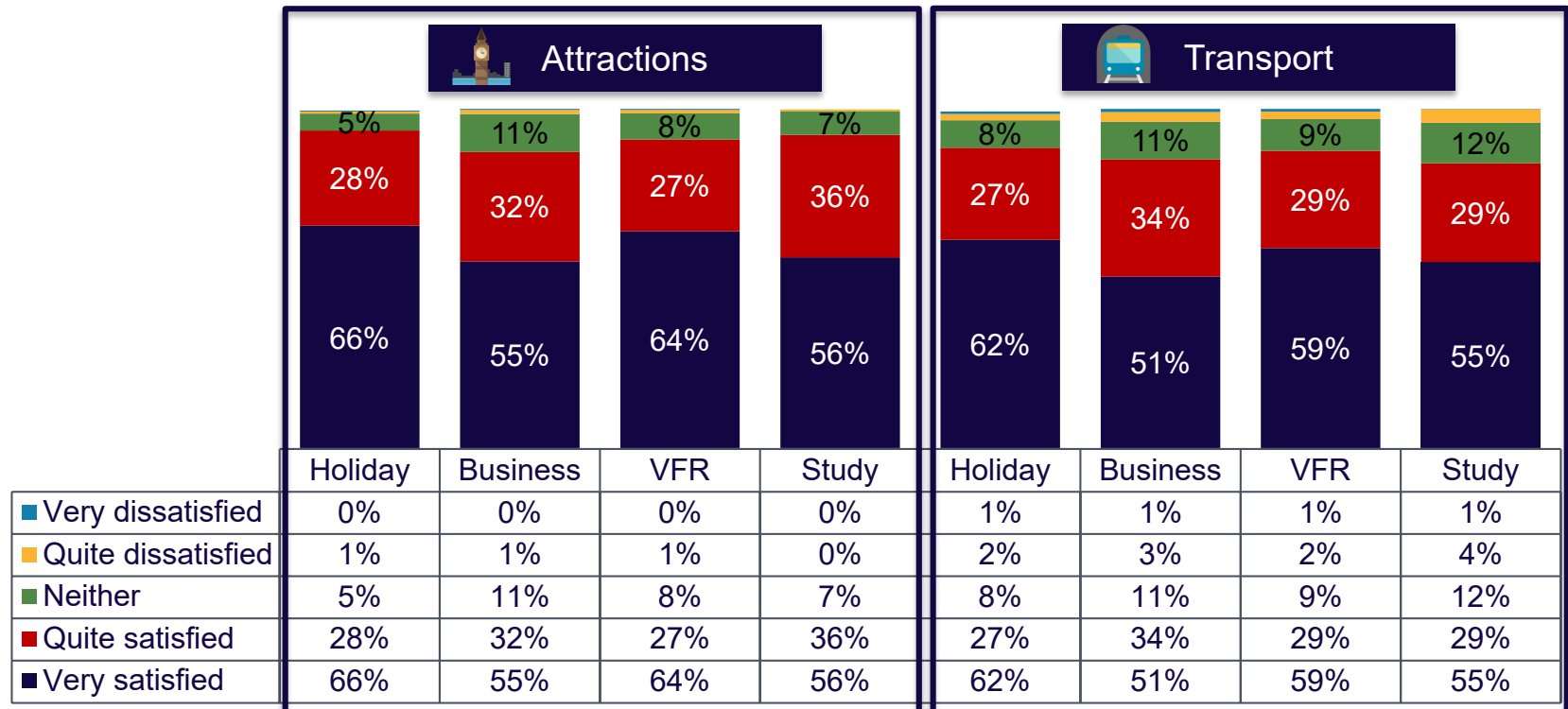
	Attractions / Activities	Transport	Food & Drink	Value for Money
Extremely satisfied	63%	59%	40%	15%
Quite satisfied	29%	29%	39%	27%
Neither	7%	9%	17%	34%
Quite dissatisfied	1%	2%	4%	19%
Very Dissatisfied	0%	1%	1%	6%

Top 2 box (% Very & Quite satisfied)	Attractions / Activities	Transport	Food & Drink	Value for Money
	92%	88%	78%	41%

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=35,596

Visitor satisfaction Trip Purpose (1/2)

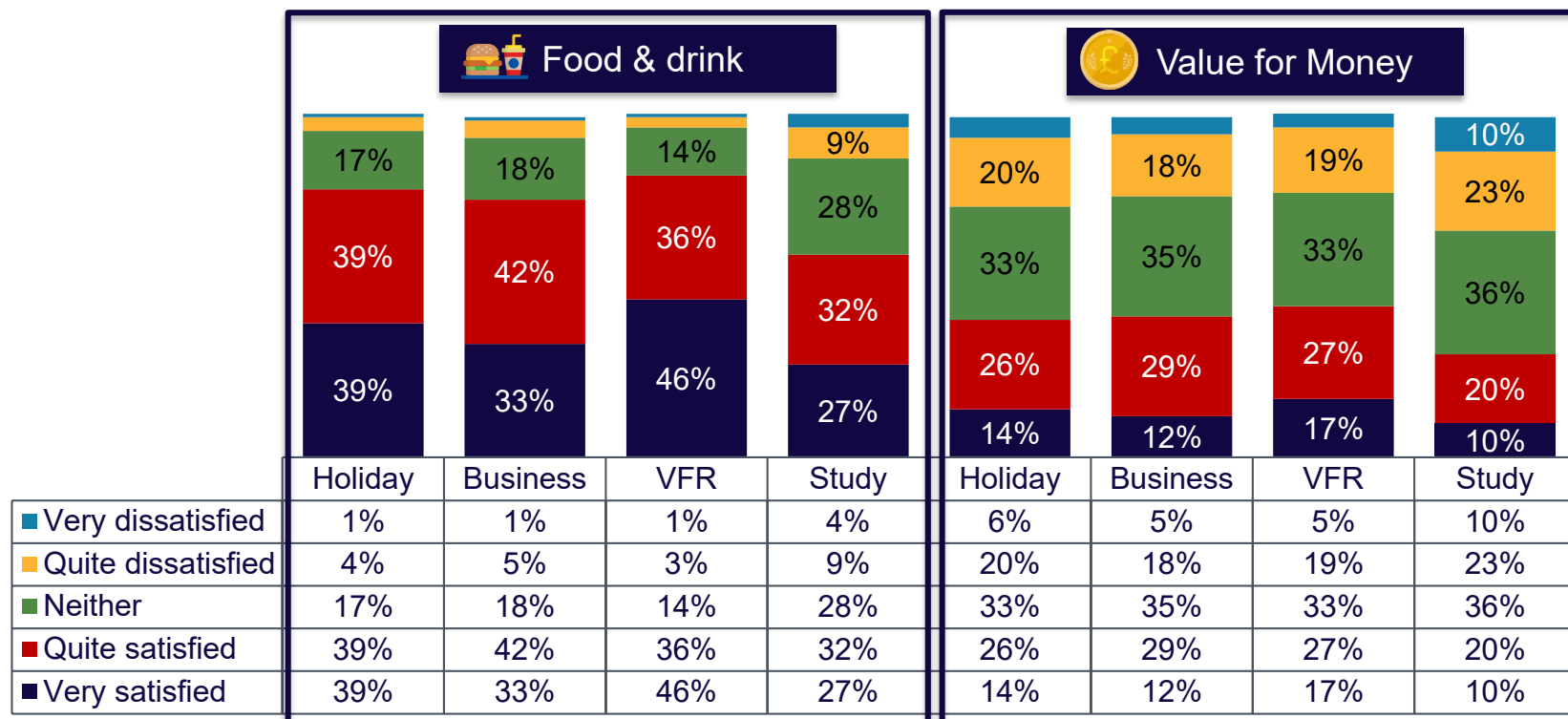
Holiday visitors are particularly satisfied by Britain's attractions and public transport. **Business visitors** have the lowest levels of satisfaction, significantly under-indexing across all categories except for value for money. Continued on next slide.



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=35,596

Visitor satisfaction Trip Purpose (2/2)

Continued from previous slide. 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.

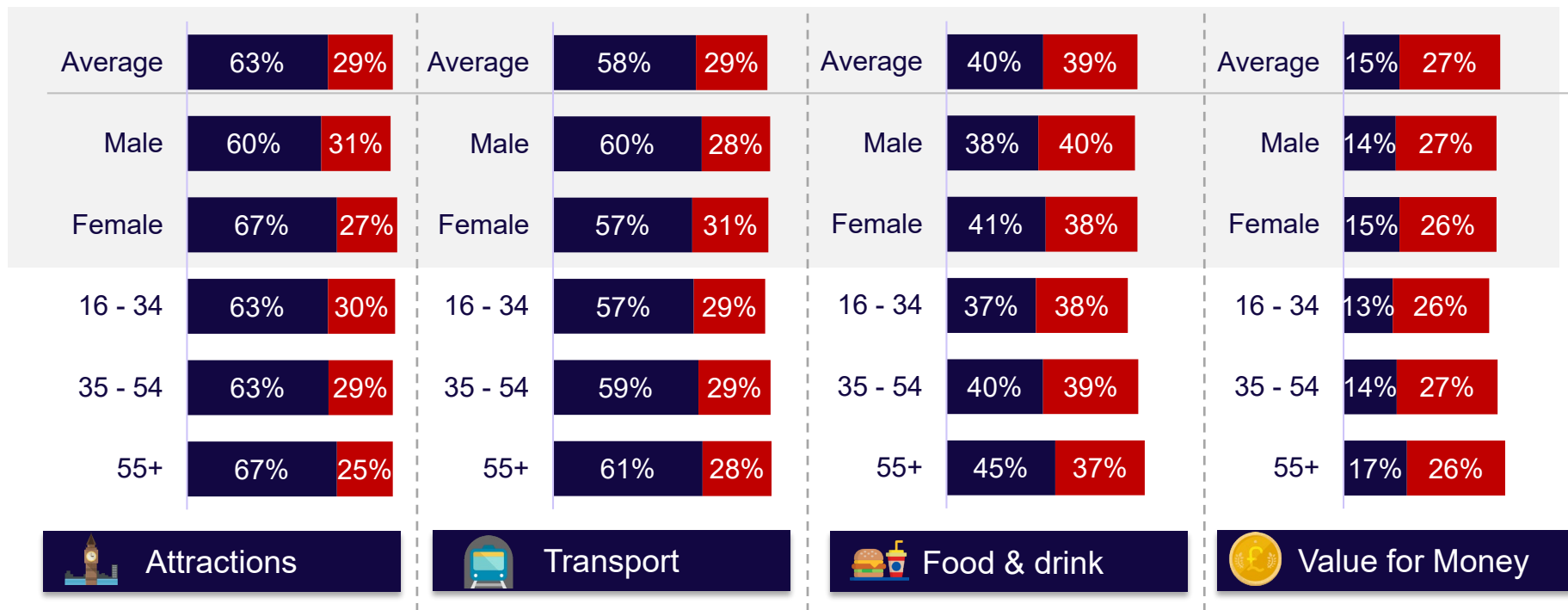


Source: International Passenger Survey 2015, Q: "How satisfied were you with your visit to the UK for Food & Drink, Public Transport, Attractions/activities, Value for Money?". On a scale of 1-5. Base: Visitors staying 1+ night in Britain, excludes UK nationals (expats) n=35,596

Visitor satisfaction Gender and Age

Women 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.

■ Extremely satisfied ■ Quite satisfied



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=35,596

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)	Australia	Belgium	Brazil	Canada	China	Denmark	France	Germany	Hong Kong	India	Ireland	Italy	Japan	Netherlands	New Zealand	Norway	Poland	Portugal	Russia	Saudi Arabia	Singapore	South Africa	South Korea	Spain	Sweden	Switzerland	Turkey	UAE	USA	TOTAL
Attractions	67	51	78	70	64	66	53	60	49	65	66	68	59	50	62	66	69	75	80	74	54	70	70	61	61	57	64	66	74	63
Transport	62	50	79	68	52	57	47	51	32	70	63	71	37	46	69	55	63	64	65	74	47	71	63	52	54	46	67	67	69	59
Food & Drink	43	29	55	52	34	43	29	34	28	50	50	26	34	33	49	47	39	31	57	61	37	54	32	25	36	41	39	60	53	40
Value for Money	15	10	15	15	23	25	10	7	11	21	18	9	12	11	16	26	18	10	25	30	10	14	23	8	15	17	13	25	20	15

Visitor satisfaction by Region

Holiday visits only



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)	Attraction Activities	Public Transport	Food & Drink	Value for money
UK Average	66%	62%	39%	14%
London	68%	65%	39%	13%
North East	52%	57%	33%	21%
North West	62%	53%	42%	21%
Yorkshire	64%	48%	36%	25%
West Midlands	62%	49%	40%	12%
East Midlands	60%	60%	33%	17%
East of England	56%	51%	35%	12%
South West	51%	45%	35%	12%
South East	53%	51%	31%	9%
Scotland	66%	62%	49%	25%
Wales	55%	49%	34%	20%



Recommending Britain

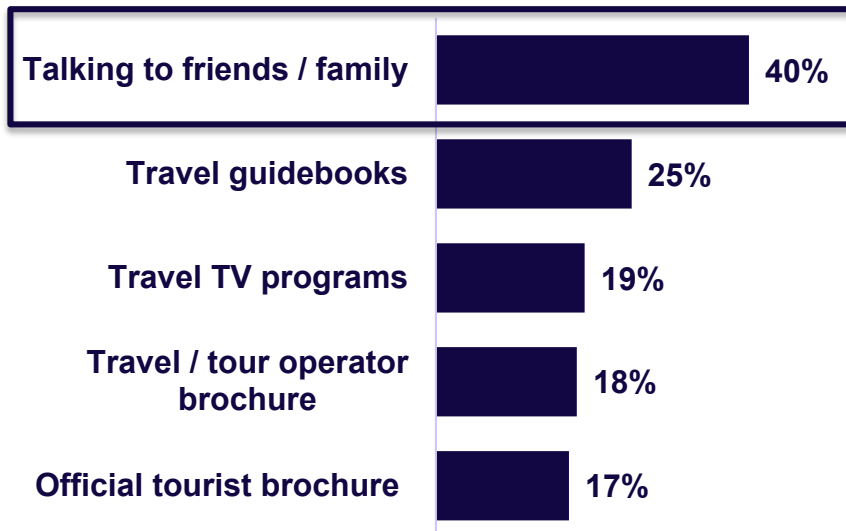


The Influence of Recommendation

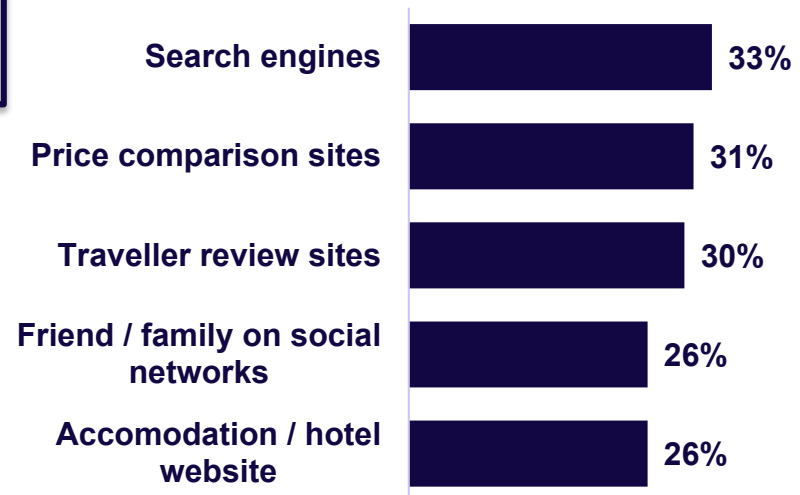
A survey commissioned by VisitBritain in 2016 found that globally, the strongest influence for destination choice is word of mouth recommendation, with talking to friends, family or colleagues key for 40% of considerers and visitors to Britain. The power of recommendation from those you trust is the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

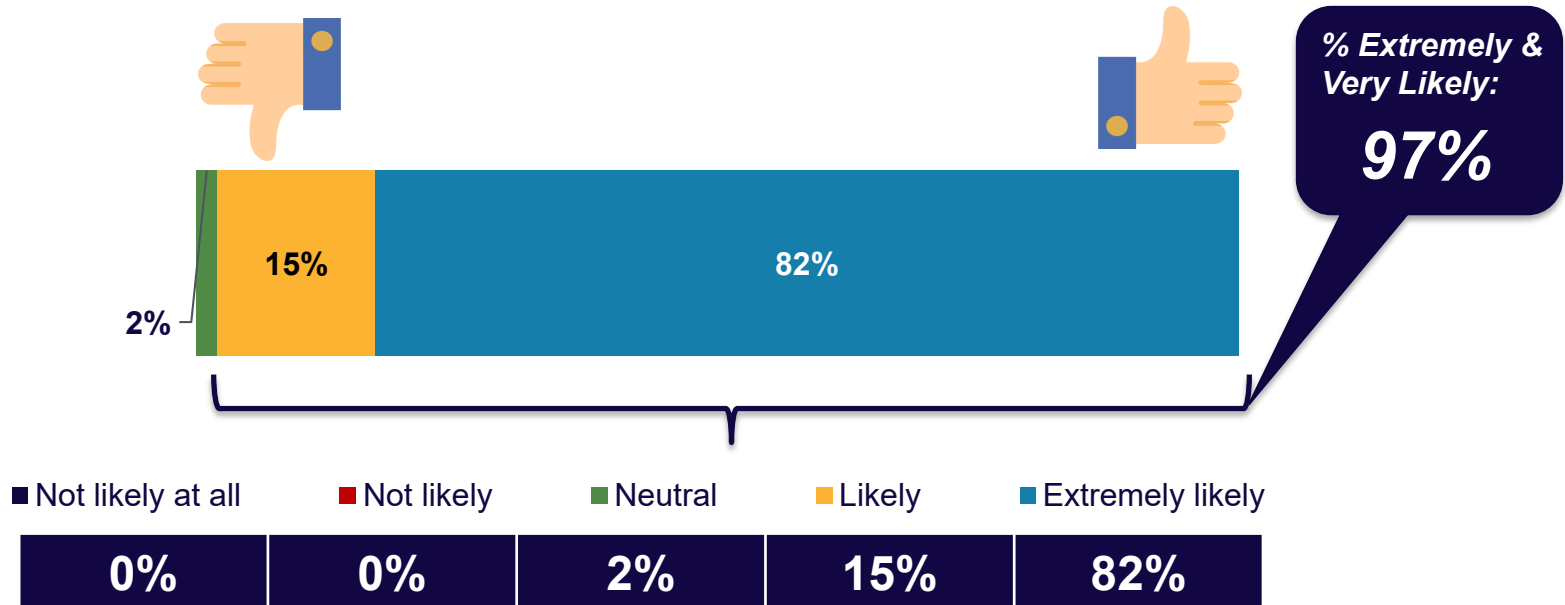


Source: VisitBritain/Ipsos, 2016. Q: "(Visitors) Thinking about your holiday to Britain, which of the following information sources influenced your choice of destination? (Considerers) Thinking about the last holiday you took to a foreign country, which of the following information sources influenced your choice of destination? Base: 11,400 respondents in 20 markets.

Recommending Britain

When asked on departure, 82% of visitors in 2017 said they were ‘extremely likely’ to recommend a visit to Britain to their friends and family, while a further 15% said they were ‘likely’ to recommend a visit. The combined positive intention to recommend equates to 97%, a very favourable result overall.

Visitors' Likelihood to Recommend Britain



Recommending Britain Market highlights (1/2)

Visitors from long-haul markets are more likely to strongly recommend Britain, with 85% saying they are likely to do so compared to an average score of 81% 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 (87%), compared to non-English speaking countries (81%).



Recommending Britain Market highlights (2/2)

Holiday visits only



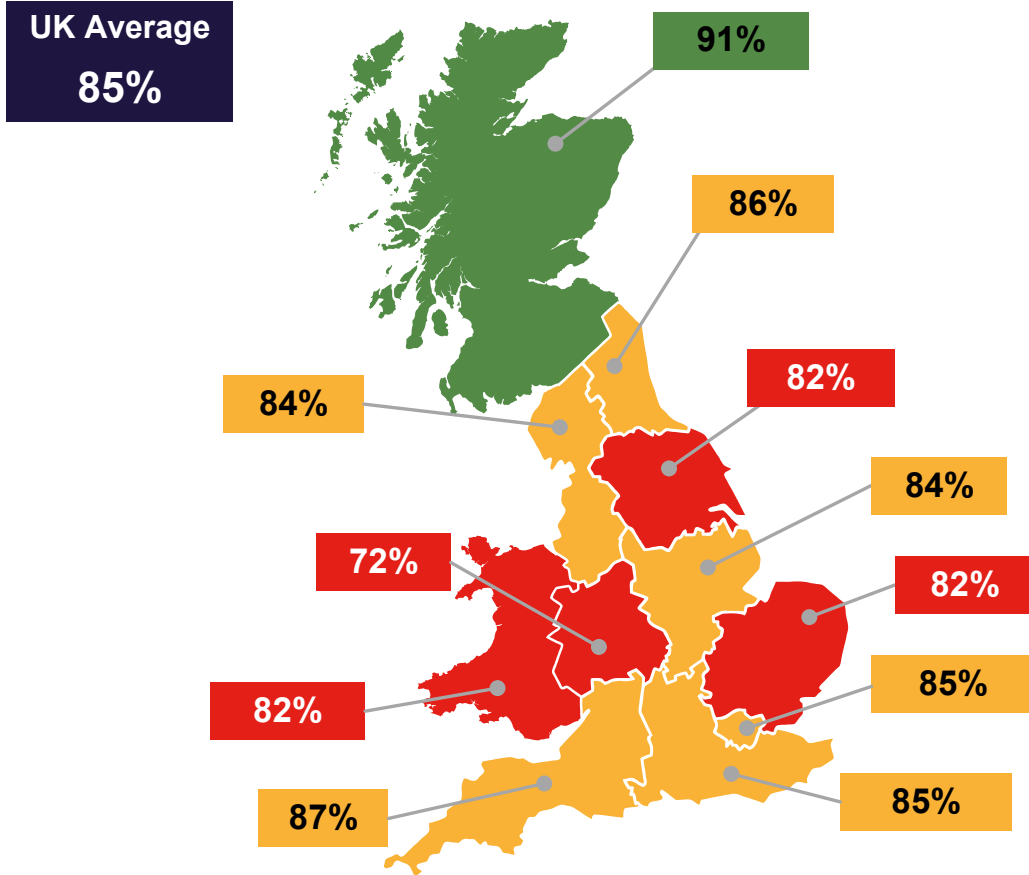
In terms of nations who were most likely to recommend a visit to the UK, Norway and Russia came out on top followed by long-haul markets Brazil, India, USA and Canada.

There were only a very small proportion of respondents that would not consider recommending Britain at some level. Holiday visitors from Singapore, China, Hong Kong and Japan were less likely to say they would be extremely likely to recommend a visit to the UK, but even here over 7 in 10 would do so.

% by market and recommend	Australia	Austria	Brazil	Canada	China	Denmark	Finland	France	Germany	Hong Kong	India	Ireland	Italy	Japan	Netherlands	Norway	Oman	Poland	Portugal	Qatar	Romania	Russia	Saudi Arabia	Singapore	South Africa	South Korea	Spain	Sweden	Switzerland	UAE	USA	TOTAL
Not likely at all	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	1	0	0	1	1	0	1	0	0	1	0	1	0	0
Not likely	0	1	0	0	0	0	0	0	1	1	0	1	0	0	0	1	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0
Neutral	2	2	0	3	3	2	2	2	2	2	1	1	0	3	2	1	5	2	1	1	4	0	3	2	4	1	1	2	1	1	1	1
Likely	13	15	9	10	24	16	17	15	12	22	8	11	14	19	17	5	18	15	21	4	16	12	11	26	11	19	12	10	13	10	10	13
Extremely Likely	85	82	91	87	73	82	81	83	86	75	90	86	86	78	80	93	78	83	77	94	80	88	86	72	84	80	87	88	85	88	89	85

Recommendation by Region

Holiday visits only



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.

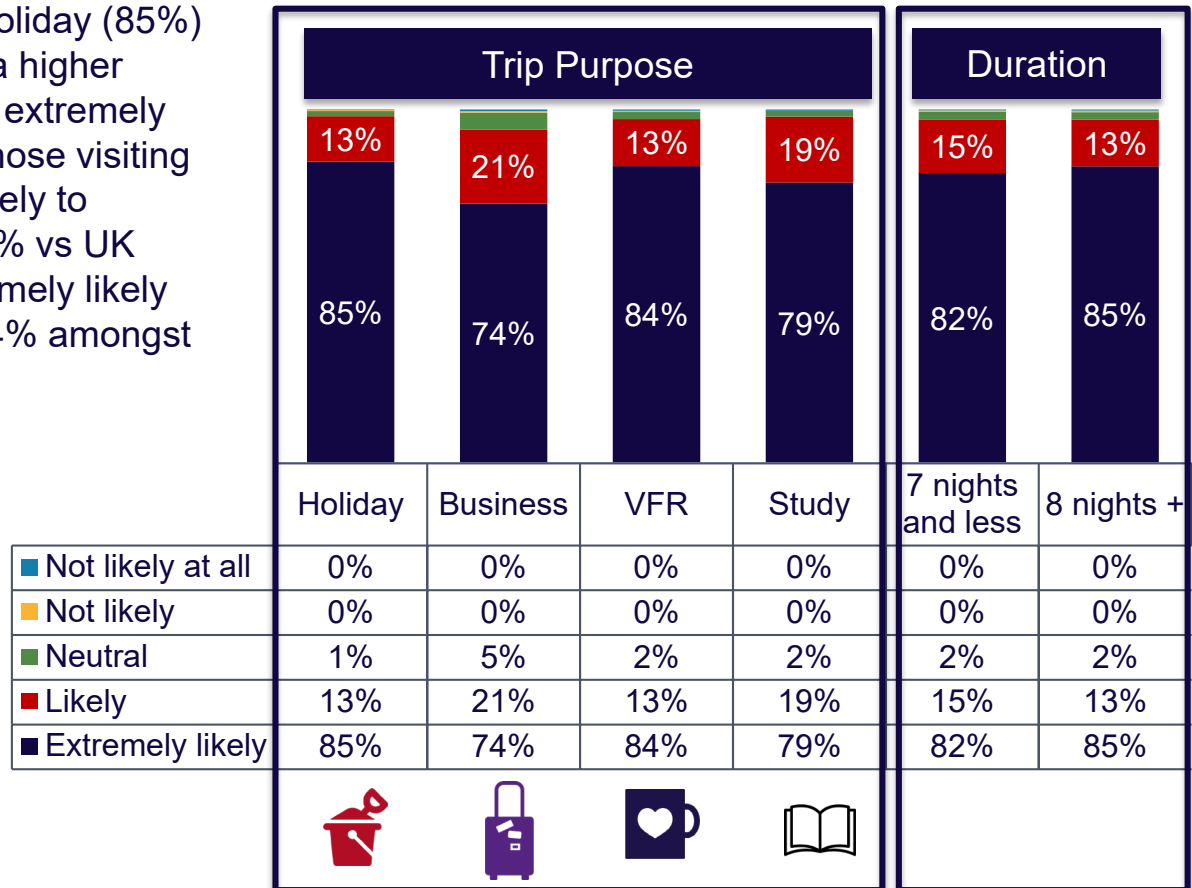
Visitors to Scotland (91%) were significantly more likely to recommend Britain than any other region. In comparison it was the West Midlands, Wales, East of England and Yorkshire that drove a weaker propensity to recommend amongst its visitors.

Recommending Britain Trip Purpose and Duration of travel

Those who visited Britain for holiday (85%) or VFR (84%) 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 (95% vs UK average of 97%) and the extremely likely scores drops significantly to 74% 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.

Likelihood to recommend Britain



Recommending Britain age and gender

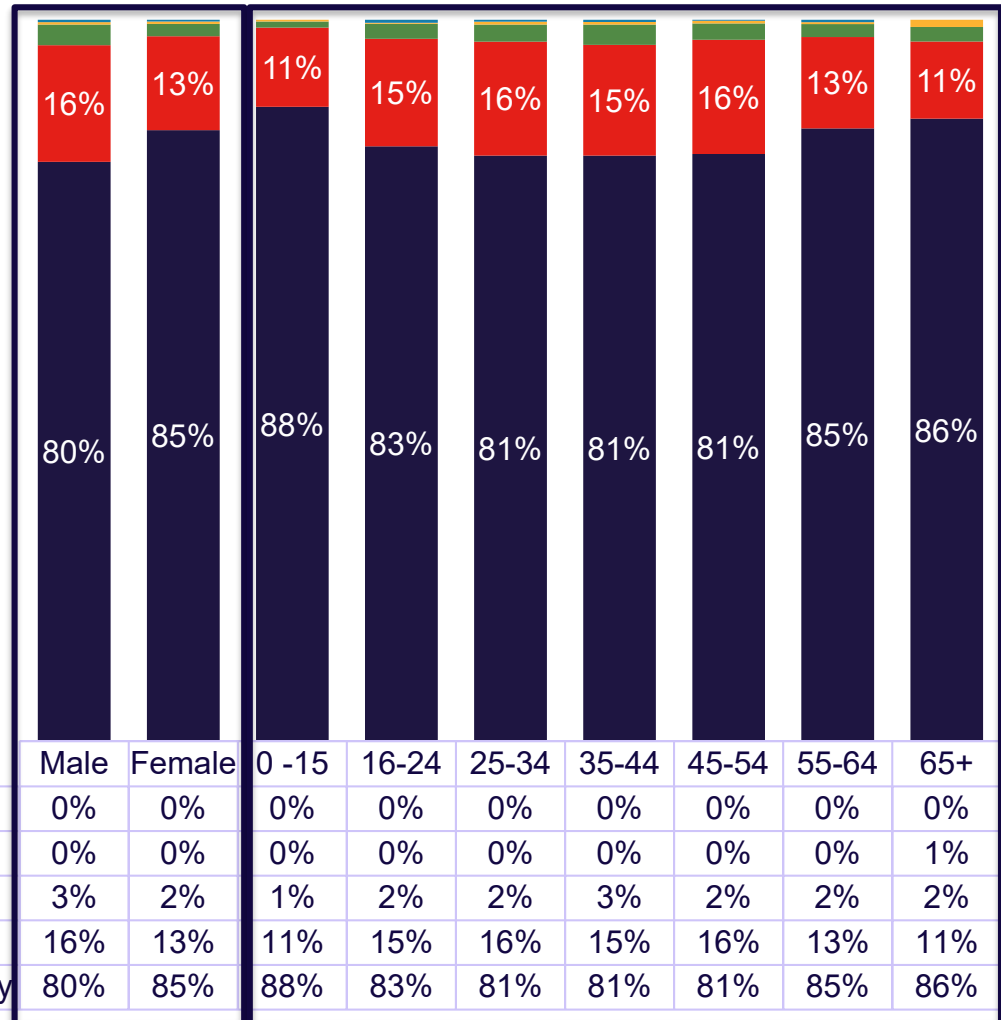
UK average:
82%

Recommendation by age and gender

While over 97% 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 more likely than men to strongly recommend Britain to friends and family. 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.



- Not likely at all
- Unlikely
- Neutral
- Likely
- Extremely likely



Appendix

Britain's Welcome Market breakdown - data

Table of the data shown in the charts on slides 9 and 10. Holiday visits only and number to be read as percentages.

Britain's welcome	Australia	Austria	Brazil	Canada	China	Denmark	Finland	France	Germany	Hong Kong	India	Ireland	Italy	Japan	Netherlands	New Zealand	Norway	Oman	Poland	Portugal	Qatar	Romania	Russia	Saudi Arabia	Singapore	South Africa	South Korea	Spain	Sweden	Switzerland	UAE	USA
Very Welcome	82	84	93	84	74	83	83	79	85	71	80	86	83	82	82	74	84	88	87	65	78	82	87	85	62	84	80	79	82	84	80	87
Welcome	15	12	7	15	22	14	15	19	13	28	15	10	15	16	17	22	13	2	10	29	21	13	13	10	37	12	17	19	17	13	16	11
Neither	1	3	0	1	3	3	2	2	2	1	5	2	3	2	1	2	2	5	2	5	1	5	0	4	1	2	3	2	0	1	2	1
Unwelcome	1	1	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	1	0	1	0	1	0	1	0	0	1	0	1	0
Very Unwelcome	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	1	5	0	0	0	0	1	0	0	0	0	0	0	2	0	0



The Visitor Experience in Britain

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