

Competitor Destinations – previous holiday destinations

Foresight 166

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Background and Methodology

Background & methodology

- The Civil Aviation Authority (CAA) conducts a passenger survey among leisure visitors at UK airports each year
- In 2017 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 2017 we asked:

*“Which countries have you travelled to for leisure in the last five years?
France, USA, Spain, Italy, Germany, Republic of Ireland, Netherlands, Australia and
Belgium”*

About this report

- This report details which other leisure destinations, amongst a pre-defined set asked to respondents, leisure visitors to Britain in 2017 had visited in the previous five years.
- In the next section, “Competitor destinations”, we look at each of the competitor destinations that respondents were asked about in turn. Slides 9-17 show the proportion who visited each destination, by country of origin of visitor.
- The following section, “Proportion by visitor market”, shows the data in the opposite way: each slide shows one country of visitor origin and then looks at which destinations they visited.

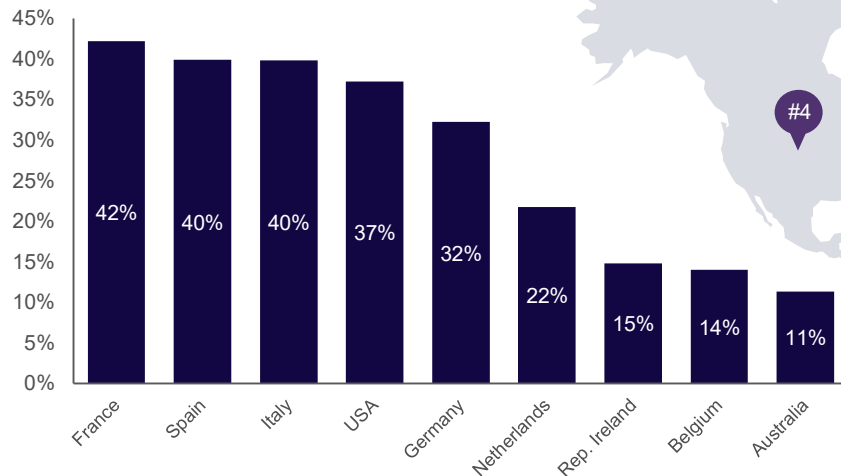
Only markets where the sample is greater than 75 have been included in the “Proportion by visitor market” section



Competitor destinations

Summary

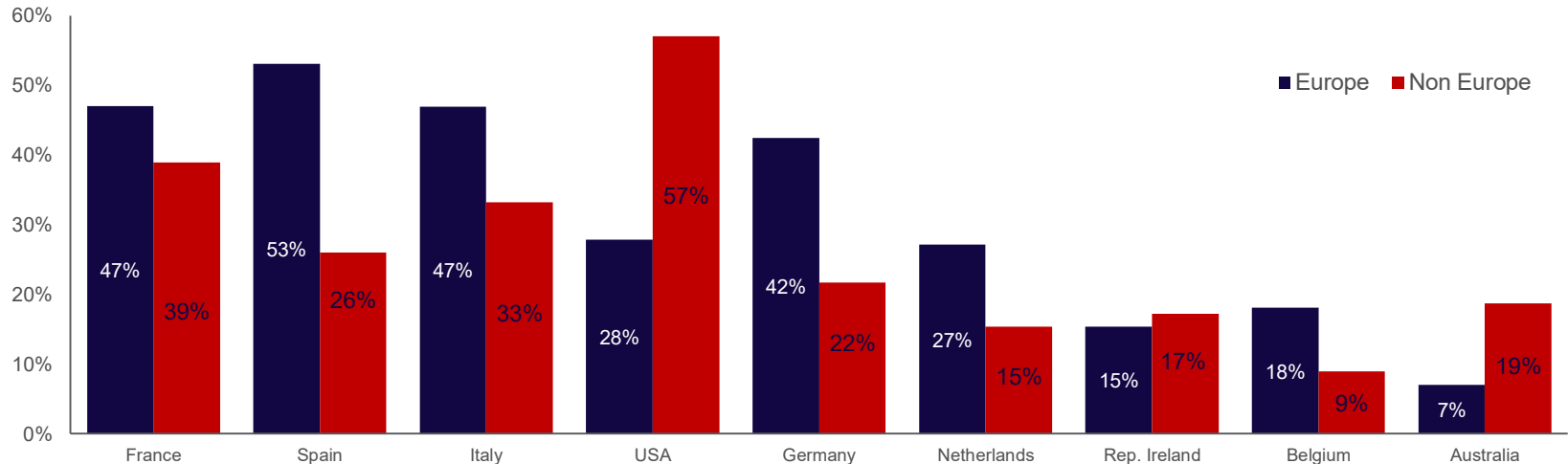
Of the holiday destinations presented to departing Britain visitors in 2017, France, Spain and Italy were most popular with at least 40% previously visiting each of these countries for a leisure break in the previous 5 years



#9

European vs. non European visitors

When exploring the data by visitors from Europe and Non European countries, other European destinations are most common amongst European visitors, but within the Non European visitors the USA was the most popular destination with 57% having previously visited the USA for a leisure break in the previous 5 years.

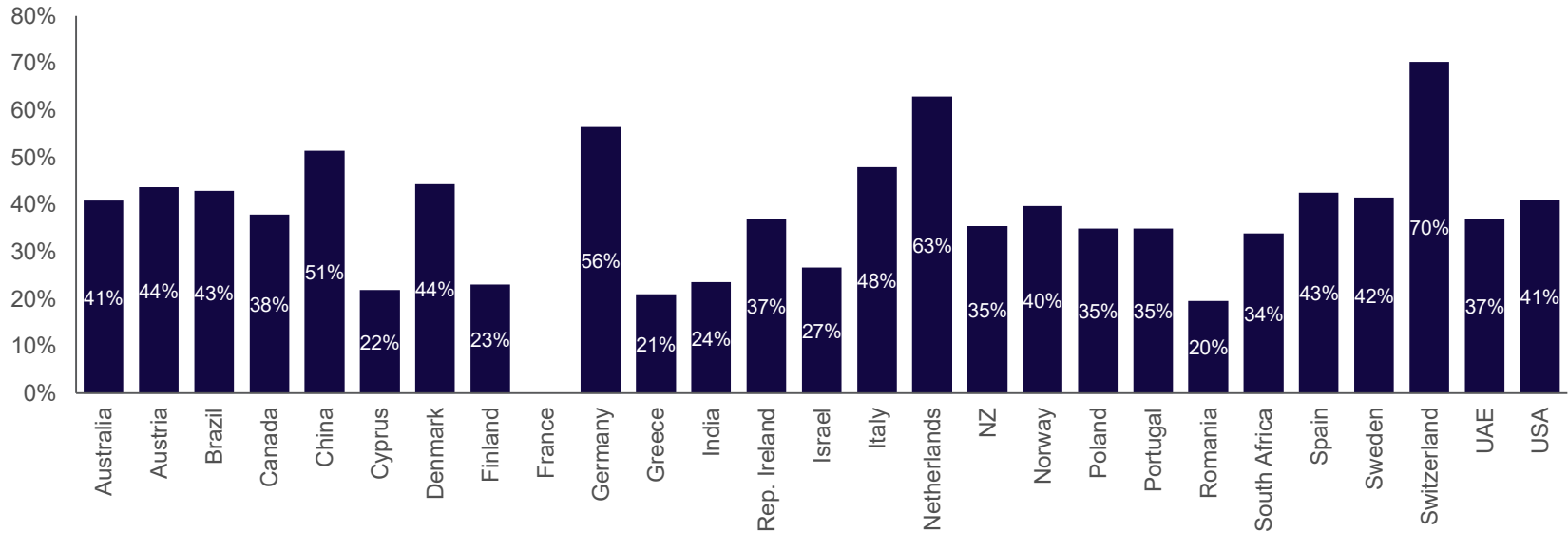


Source: CAA 2017, VisitBritain sponsored question. Base: 7,167 respondents.

Europe=Germany, Spain, Ireland, Italy, France, Sweden, Norway, Netherlands, Poland, Denmark, Switzerland, Romania, Portugal, Austria, Cyprus, Greece and Finland

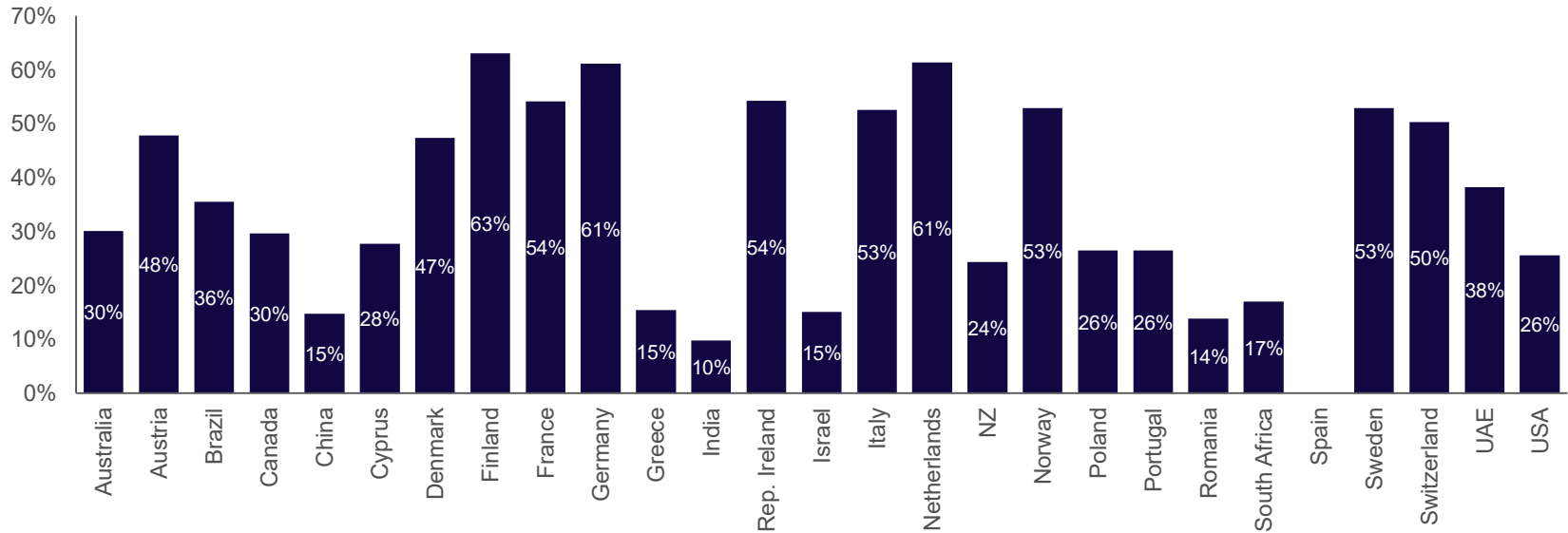
France

France is a holiday destination visited by holiday-makers to Britain from a variety of countries, particularly Switzerland, Netherlands and Germany



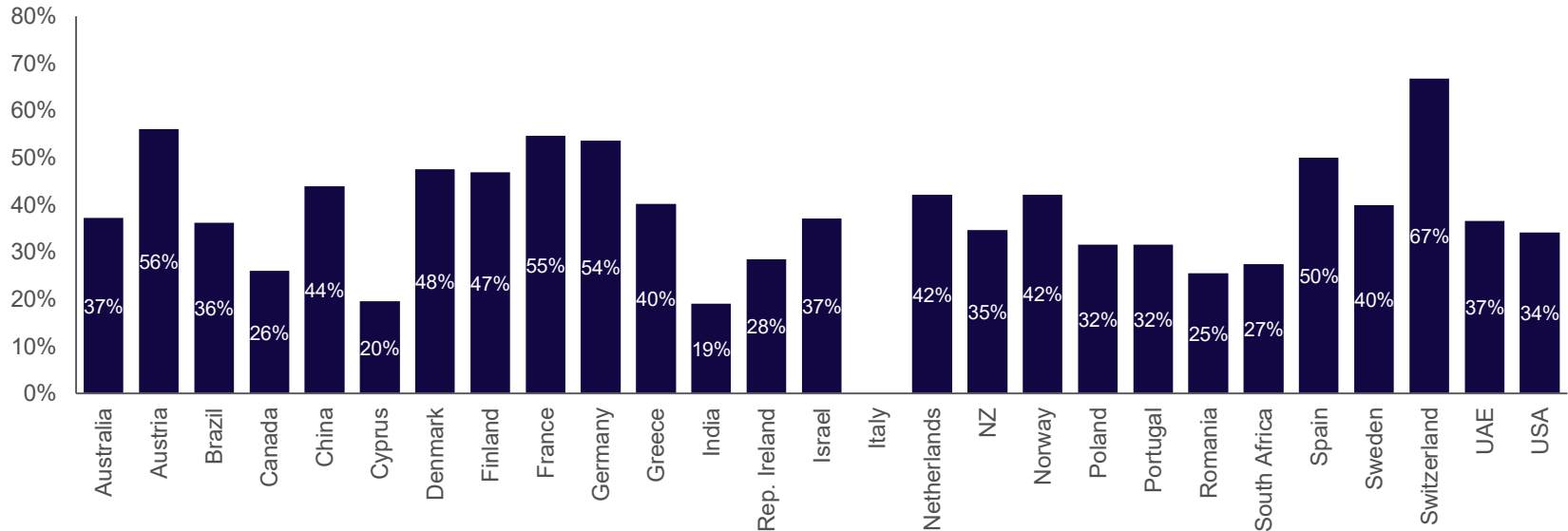
Spain

Spain welcomed leisure visitors from a range of countries in the five years to 2017 including the Nordics and Republic of Ireland, although it receives fewer visitors from many long haul markets than France or Italy



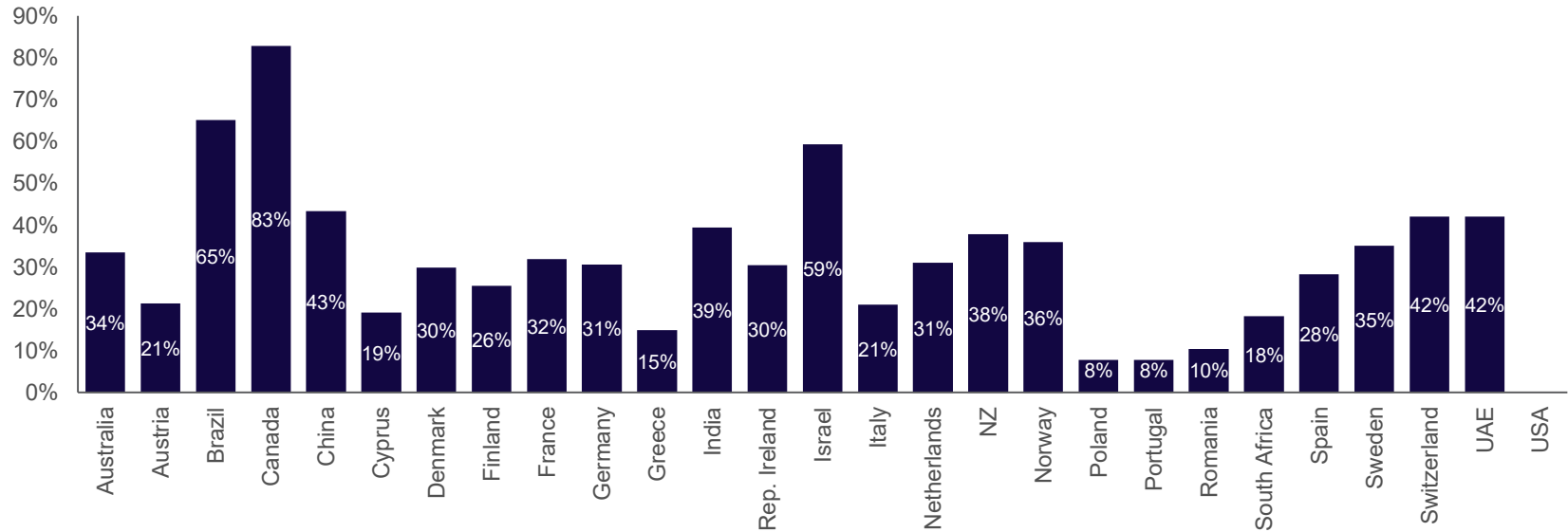
Italy

Amongst those visiting Britain in 2017, many had also visited Italy at least once since 2012. Visitors from Switzerland, Austria, Germany and France were the most likely to have visited Italy.



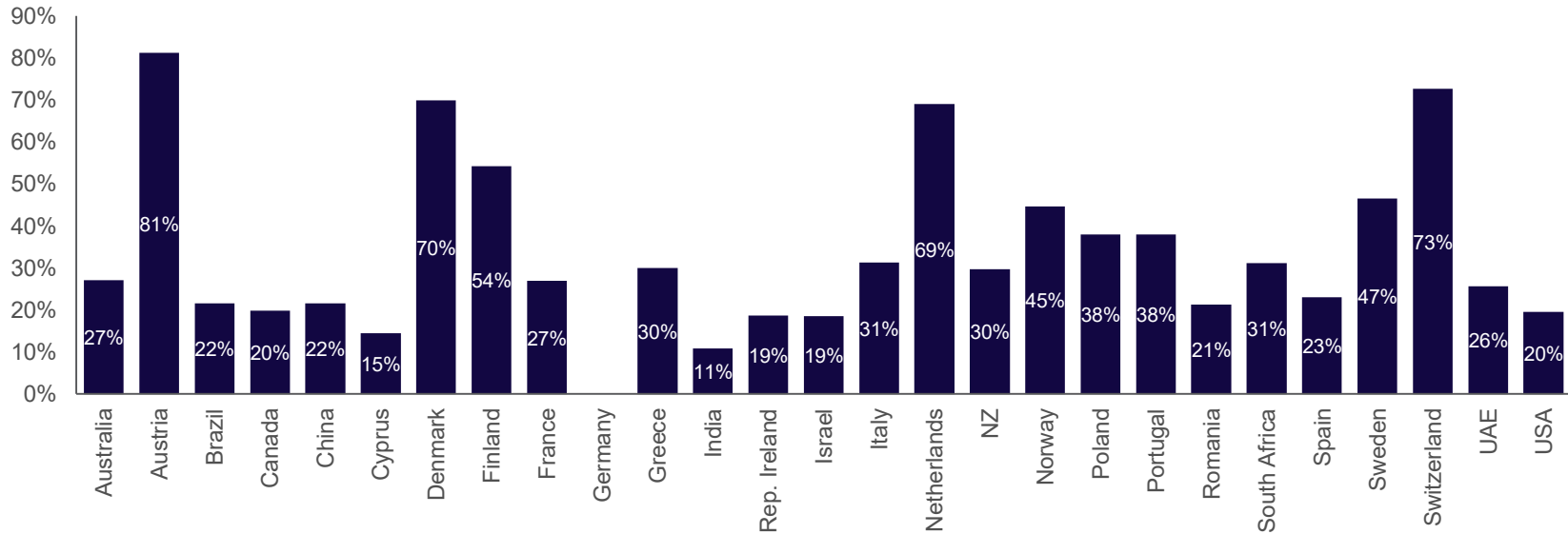
USA

The USA most commonly featured on previous holiday itineraries amongst those visiting Britain in 2017 from their near neighbours Canada, as well as Brazil and Israel



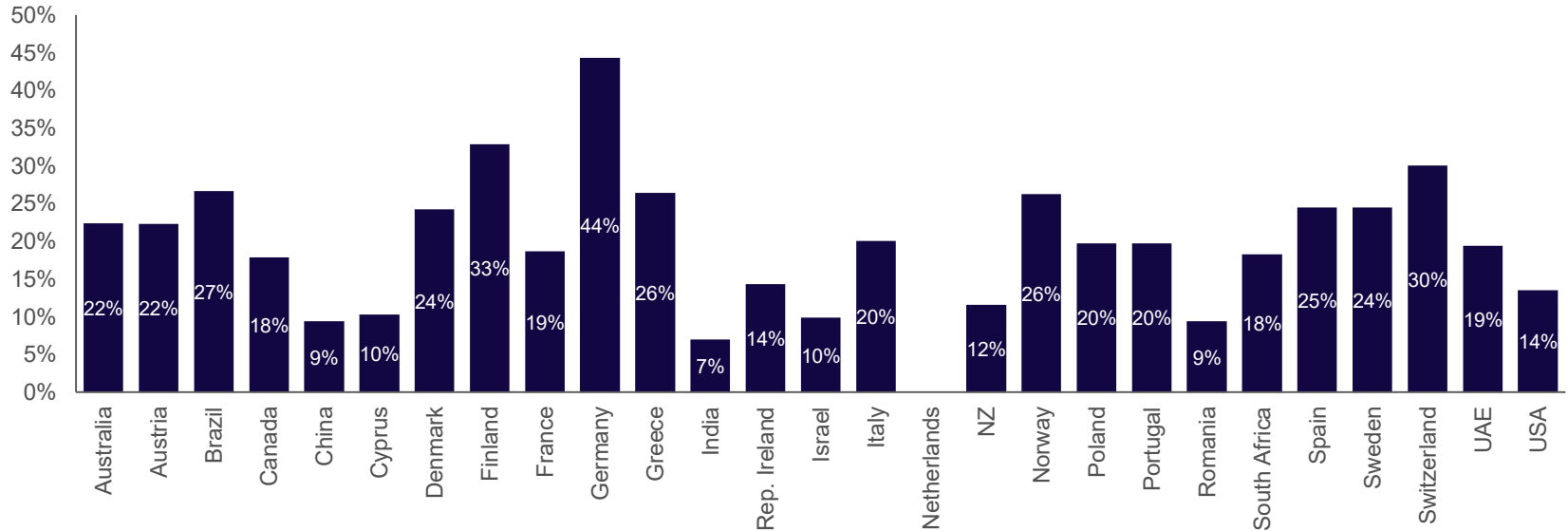
Germany

Germany is a holiday destination visited by holiday makers to Britain from a variety of countries, including Denmark and the Netherlands as well as neighbouring Austria and Switzerland



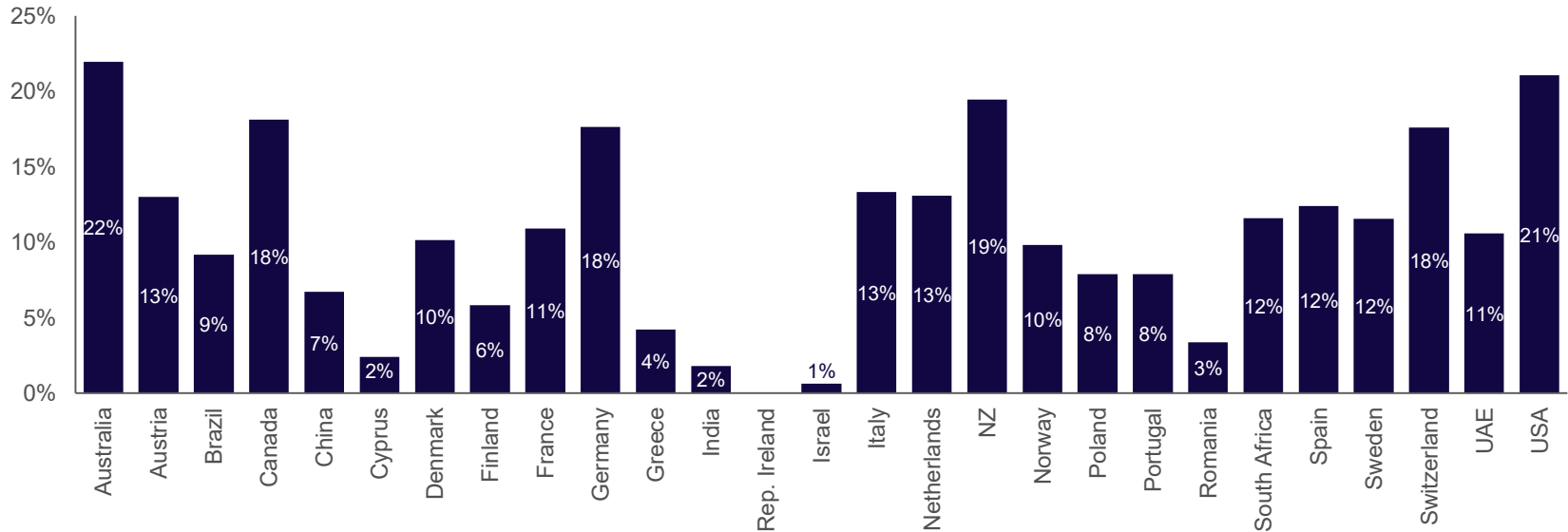
Netherlands

Netherlands, as a near neighbour, has been a popular holiday destination amongst holiday-makers to Britain in 2017, in the previous 5 years, from markets like Germany and Switzerland



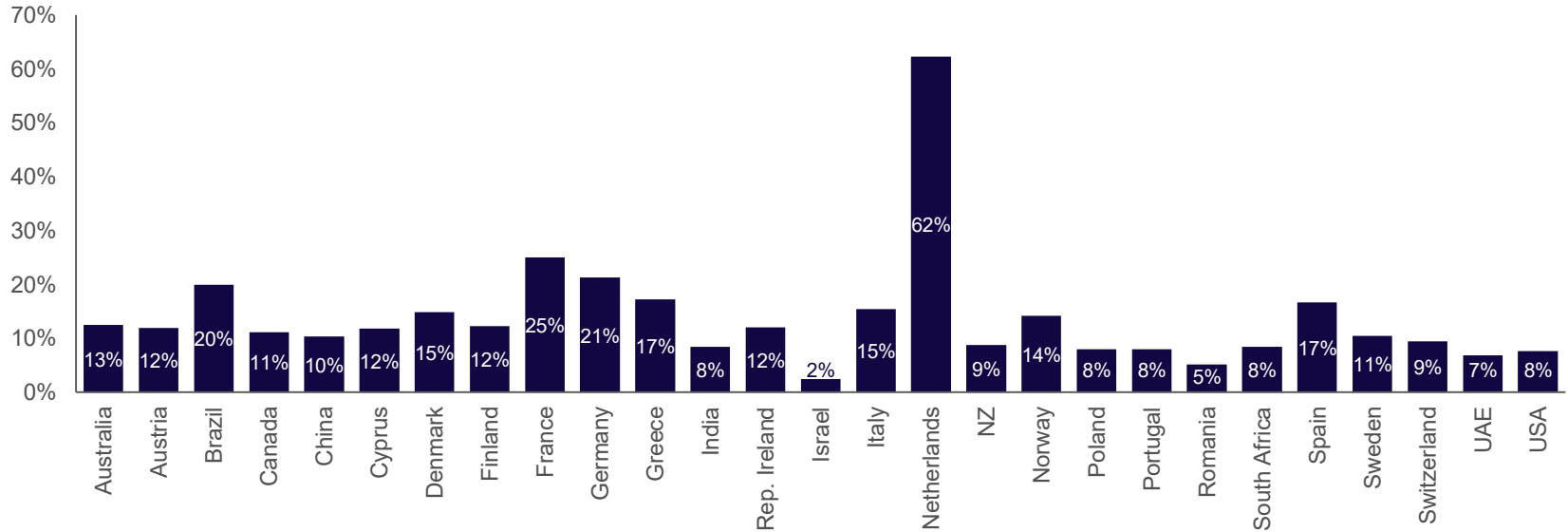
Republic of Ireland

Amongst leisure visitors to Britain, the markets most likely to visit the Irish Republic as a leisure destination include long haul English speaking destinations such as Australia, Canada, New Zealand and USA



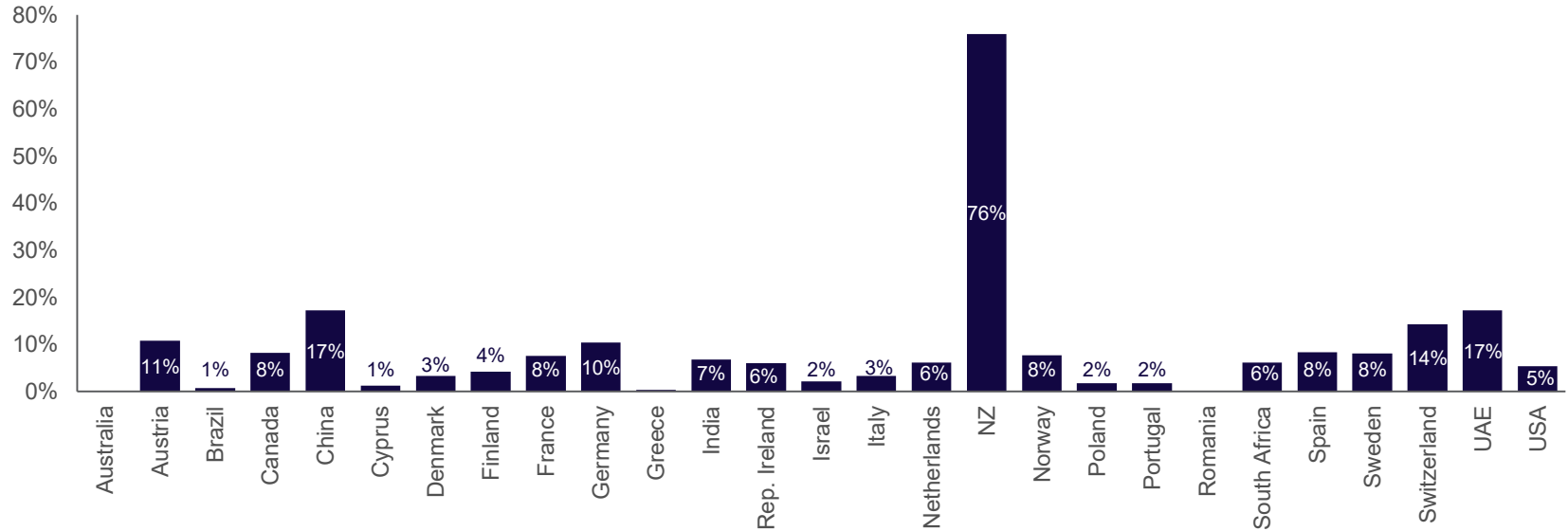
Belgium

The market by far the most likely to visit Belgium for a holiday, amongst holiday visitors to Britain in 2017, was the Netherlands with almost 2/3 Britain bound visitors spending leisure time in neighbouring Belgium



Australia

Not surprisingly the country most likely to visit Australia, amongst leisure visitors to Britain in 2017, was neighbouring New Zealand. The proximity of New Zealand to Australia makes it an easy destination to visit. UAE and China were equal second place.





Proportion by visitor market

Destination rank by market – top 3

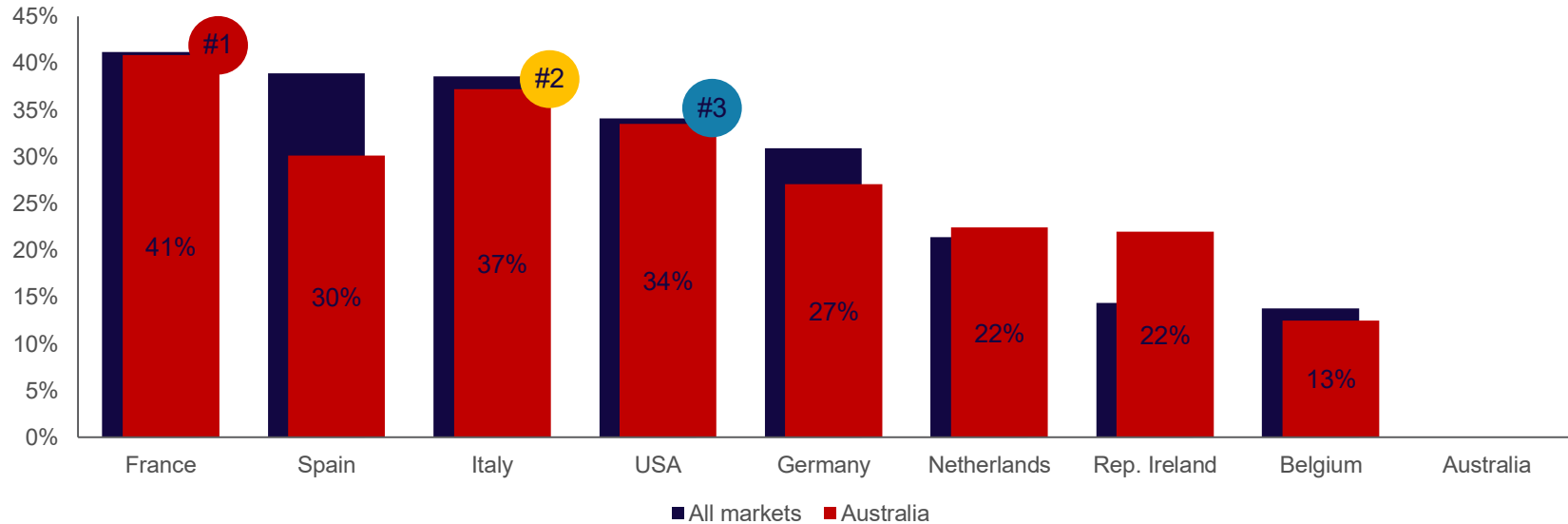


	Australia	Austria	Brazil	Canada	China	Cyprus	Denmark	Finland	France	Germany	Greece	India	Rep. Ireland	Israel	Italy	Netherlands	New Zealand	Norway	Poland	Portugal	Romania	South Africa	Spain	Sweden	Switzerland	UAE	USA	
France	#1		#2	#2	#1	#2				#2		#2	#2	#3	#2	#2	#3		#2	#2	#3	#1	#2	#3	#2	#3	#1	
Spain		#3		#3		#1	#3	#1	#2	#1			#1		#1			#1						#1		#2	#3	
Italy	#2	#2	#3		#2	#3	#2	#3	#1	#3	#1	#3		#2			#3	#3	#3	#3	#3	#3	#3		#3	#3	#2	#2
USA	#3		#1	#1	#3							#1	#3	#1			#2				#1		#3			#1		
Germany		#1					#1	#2							#3	#1		#2	#1	#1	#2	#2		#2	#1			
Netherlands											#3																	
Rep. Ireland																												
Belgium									#3																			
Australia															#3	#1												

The next set of slides are a breakdown of the data, by country of visitors' origin, of visitors to Britain against each of the competitor leisure destinations listed in this study. Where the proportion shown for a destination is higher for the source market than for the global total, that means visitors from this source market are more likely to visit the destination for leisure than the global average. The above table shows the 1st, 2nd and 3rd ranked destination for each source market.

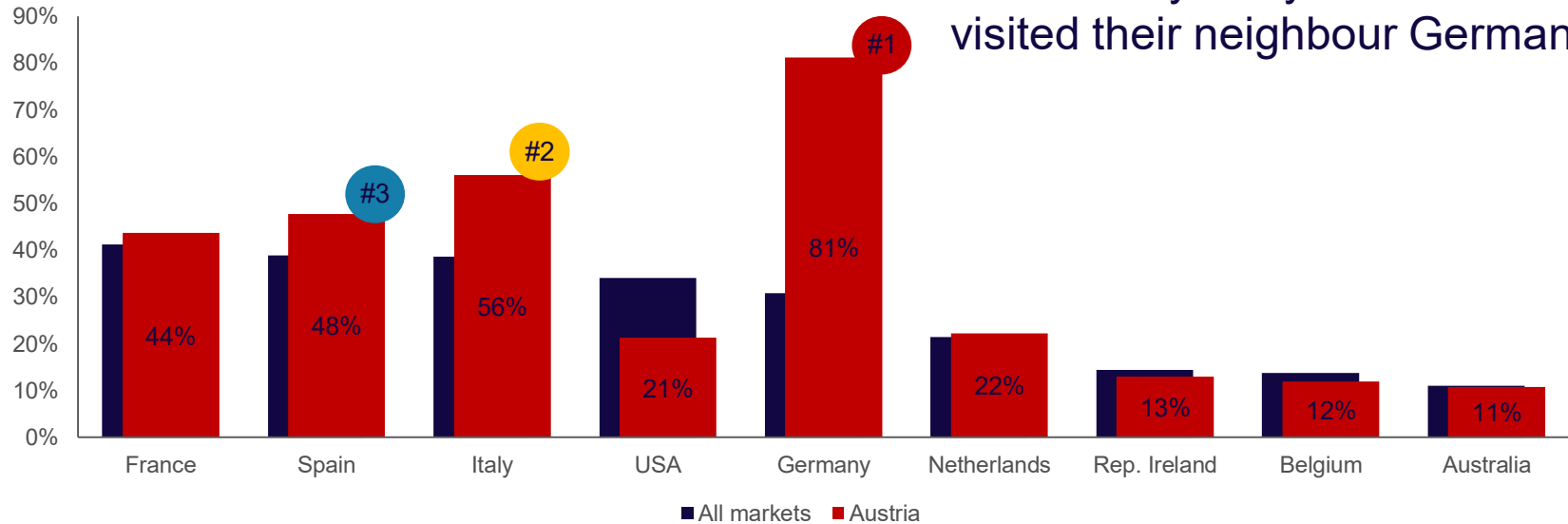
Australia

Australian leisure visitors over-index on visits to Ireland



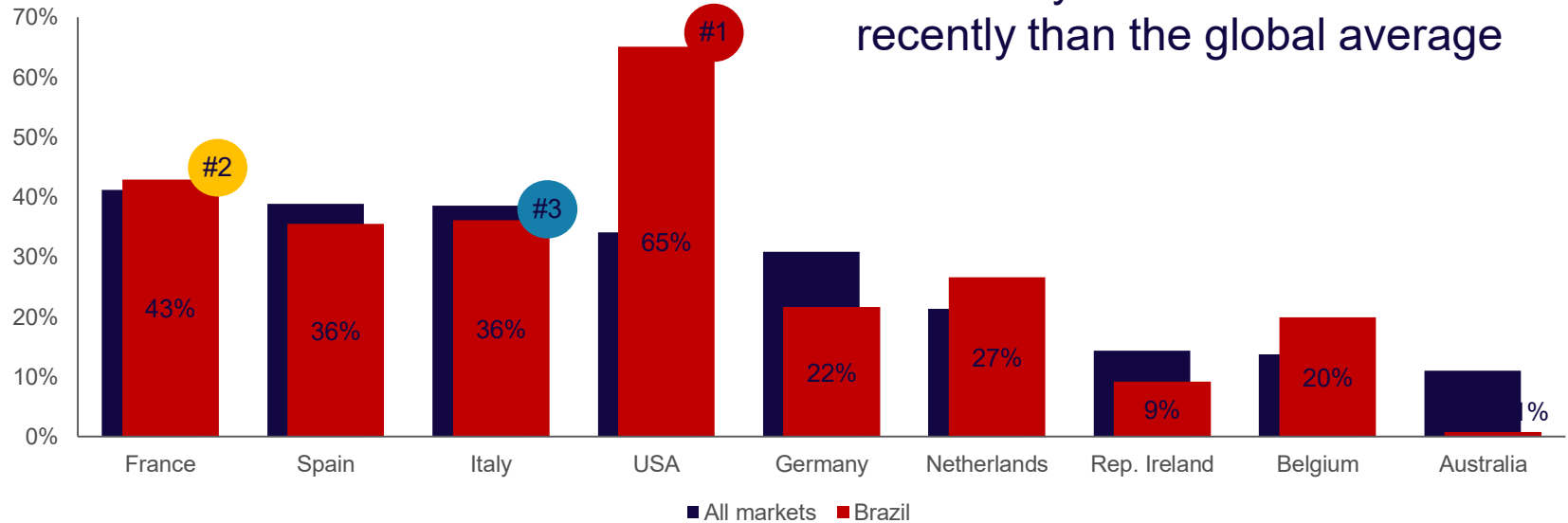
Austria

Austrian leisure visitors to the UK are very likely to have also visited their neighbour Germany



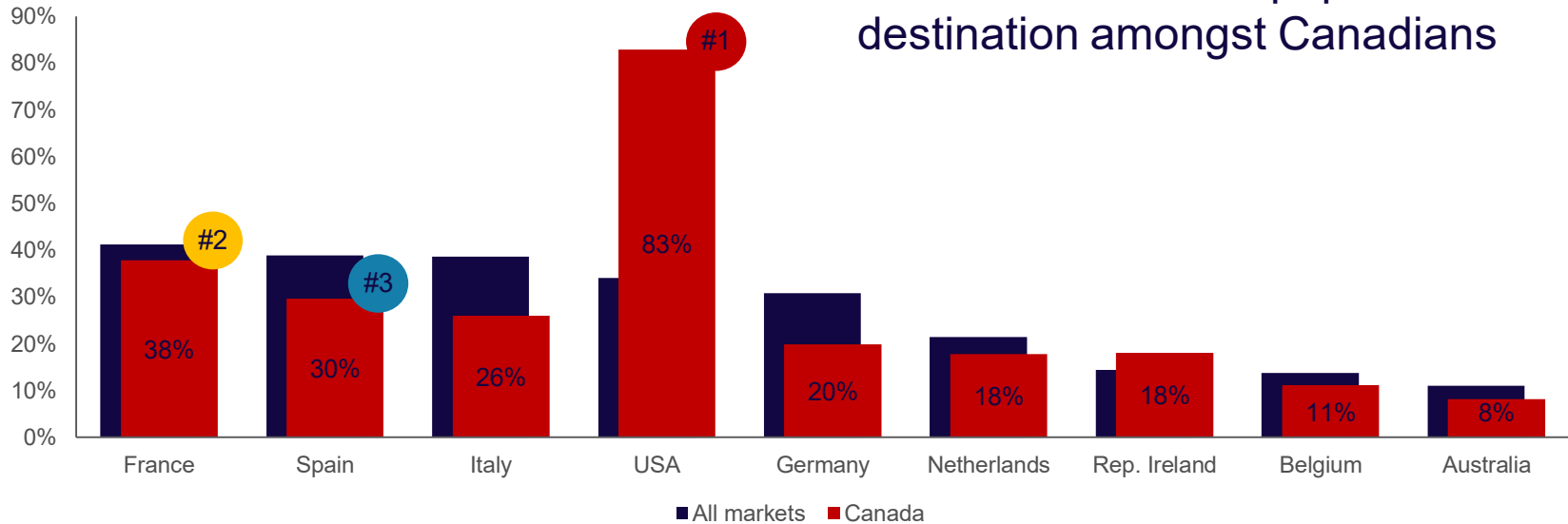
Brazil

Brazilian leisure visitors are much more likely to have visited the USA recently than the global average



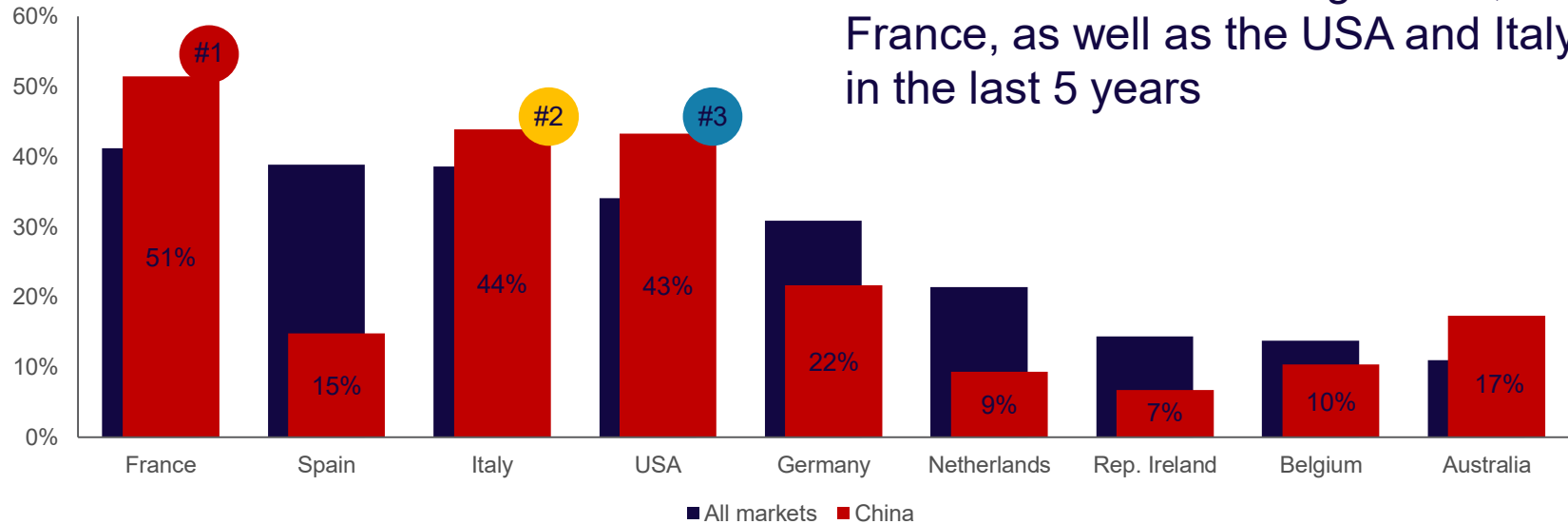
Canada

Due to their geographical proximity, the USA is the most popular leisure destination amongst Canadians



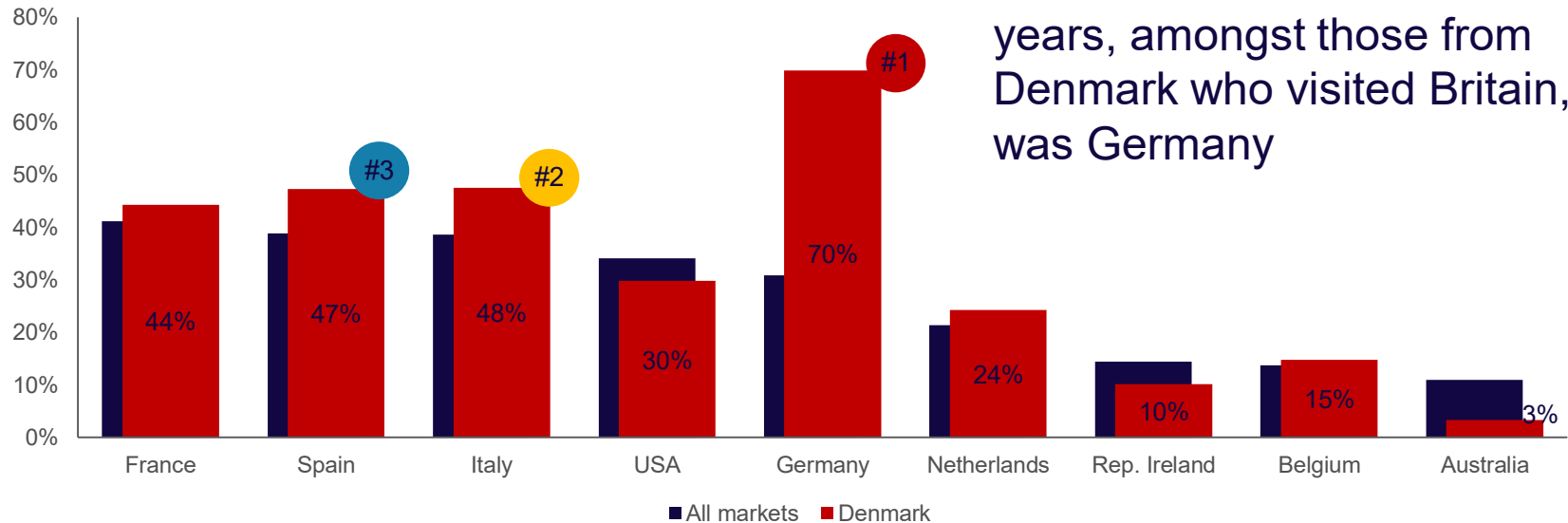
China

Many Chinese visitors to Britain have also visited our near neighbours, France, as well as the USA and Italy, in the last 5 years



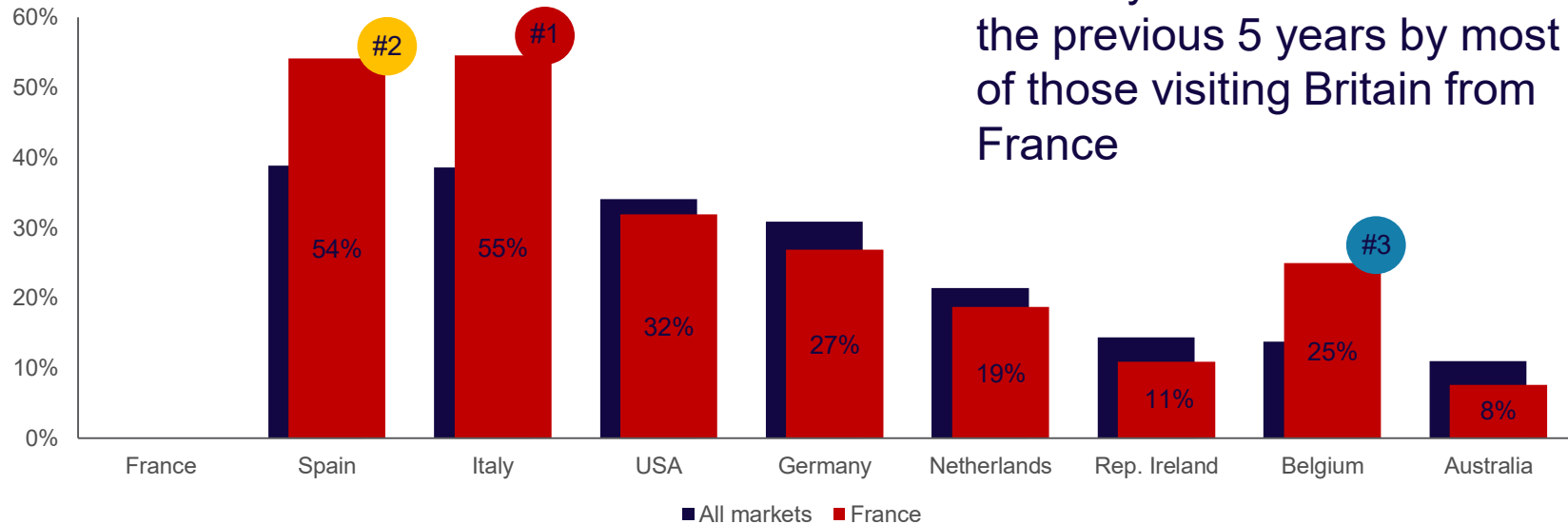
Denmark

The most popular leisure destination in the last five years, amongst those from Denmark who visited Britain, was Germany



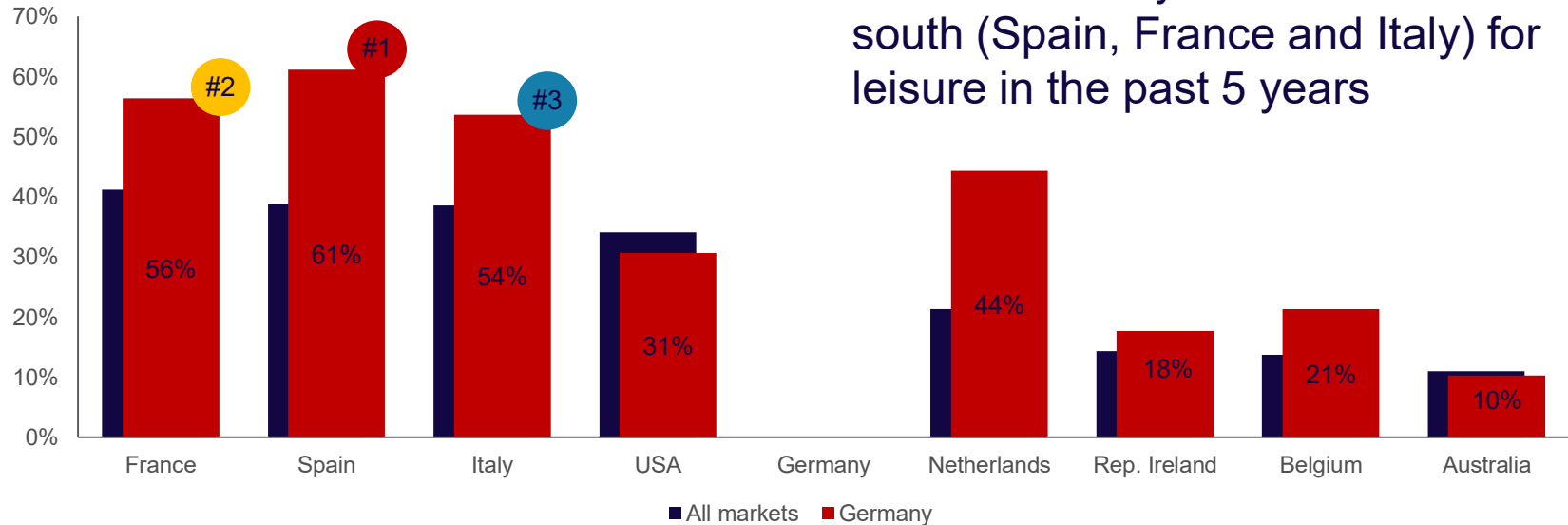
France

The near neighbours of Spain and Italy had been visited in the previous 5 years by most of those visiting Britain from France



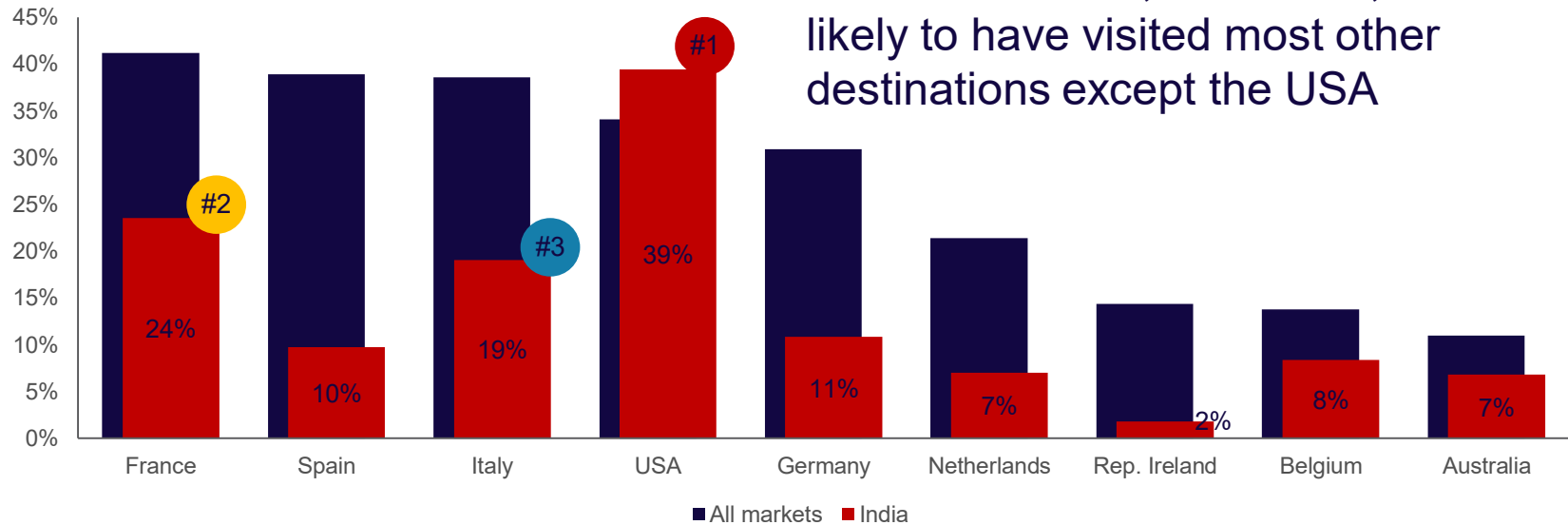
Germany

Visitors to Britain from Germany were most likely to have headed south (Spain, France and Italy) for leisure in the past 5 years



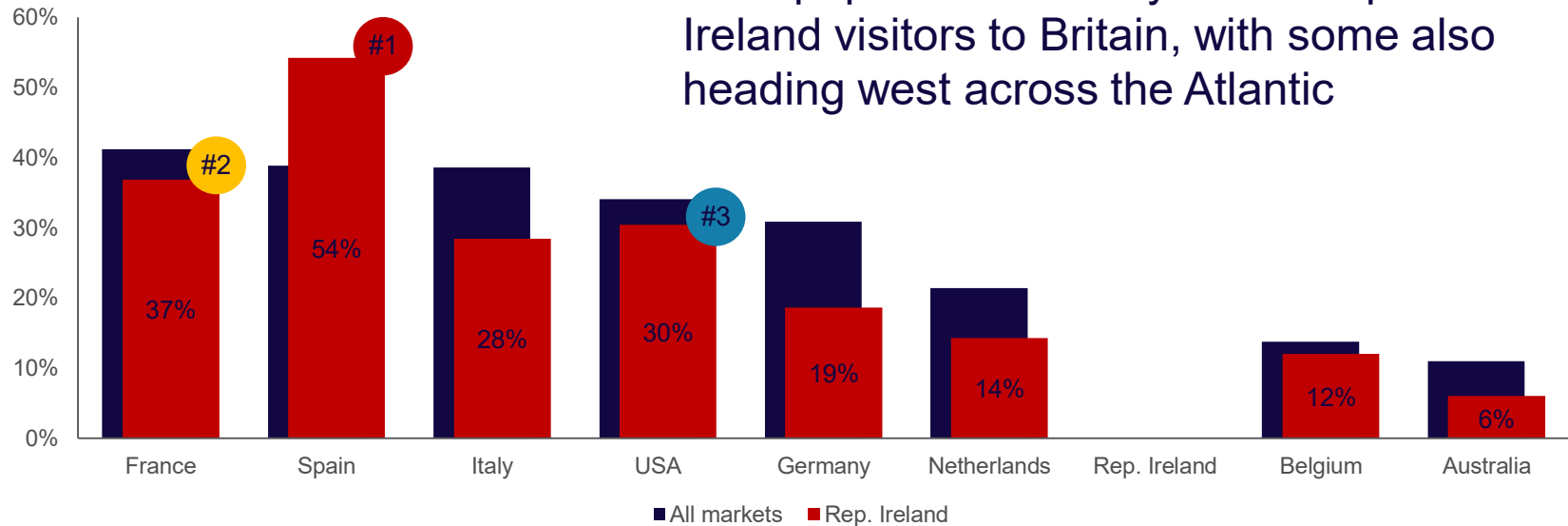
India

Compared to the all market average, visitors to Britain, from India, are less likely to have visited most other destinations except the USA



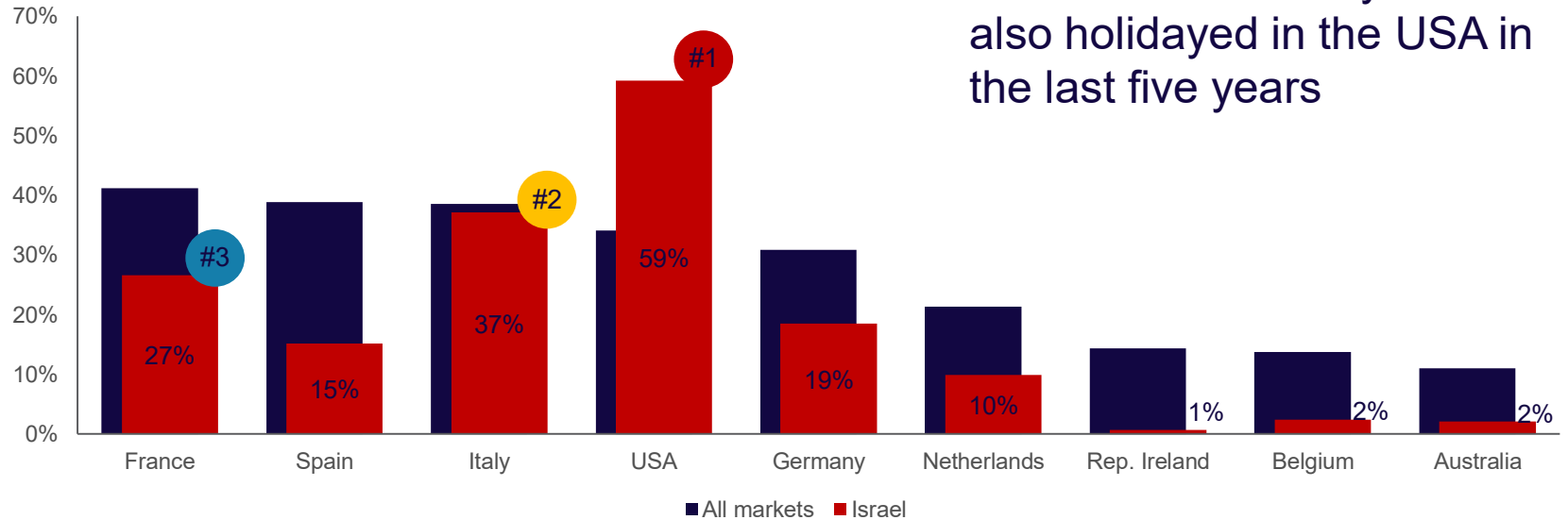
Republic of Ireland

Southern European destinations were the most popular for holidays from Republic of Ireland visitors to Britain, with some also heading west across the Atlantic



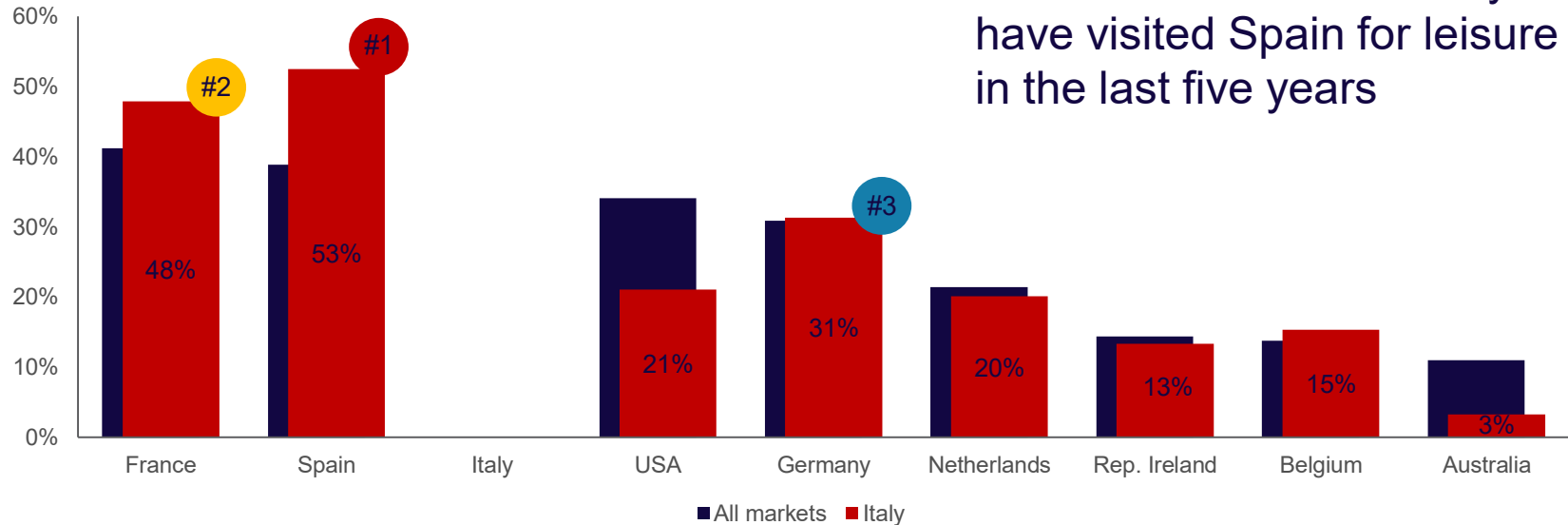
Israel

Holiday makers to Britain from Israel are most likely to have also holidayed in the USA in the last five years



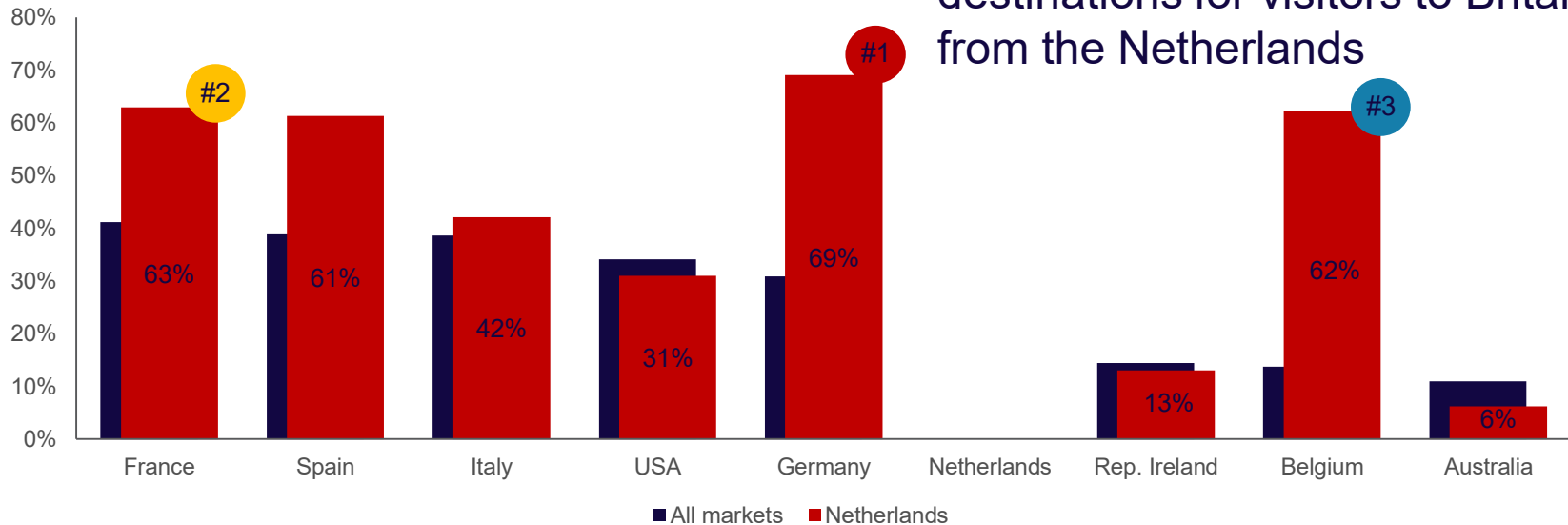
Italy

Just over half of holiday visitors to Britain from Italy have visited Spain for leisure in the last five years



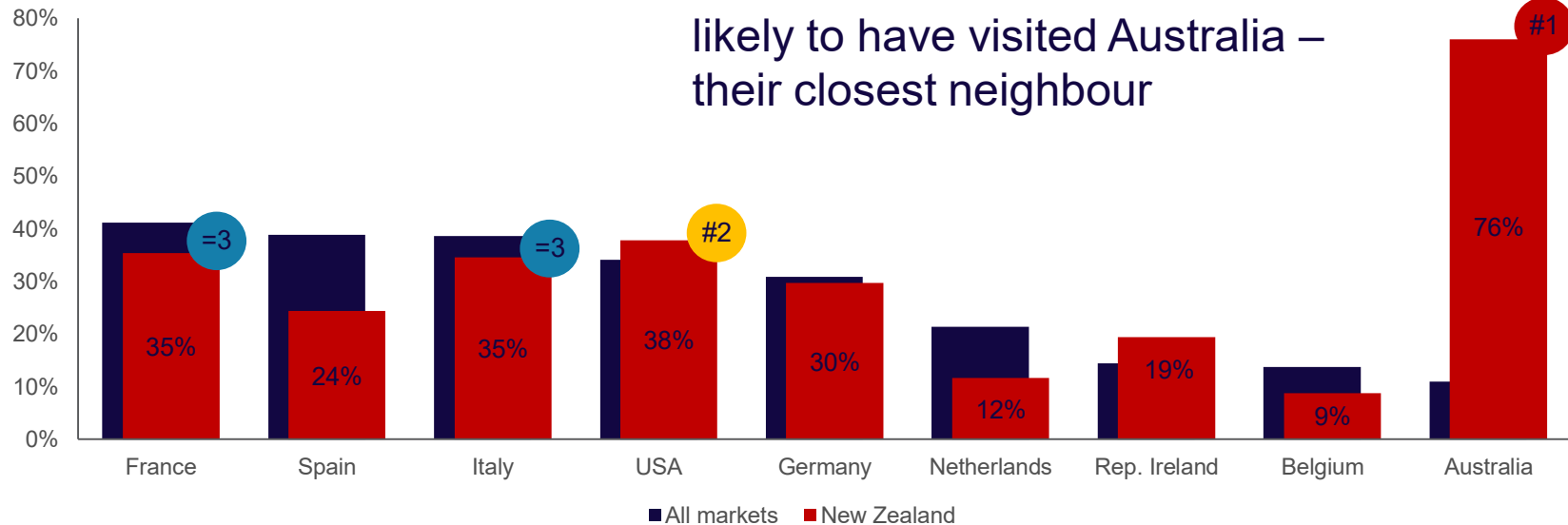
Netherlands

Germany, Belgium and France were all popular leisure destinations for visitors to Britain from the Netherlands



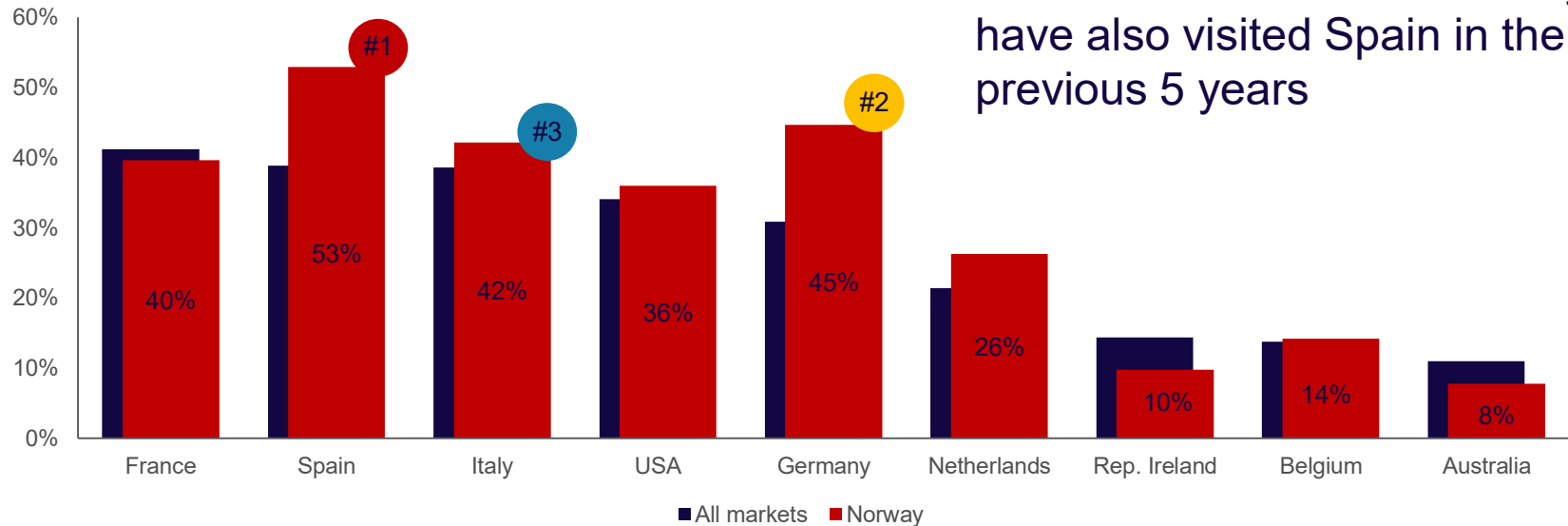
New Zealand

Not surprisingly New Zealand visitors to Britain are much more likely to have visited Australia – their closest neighbour



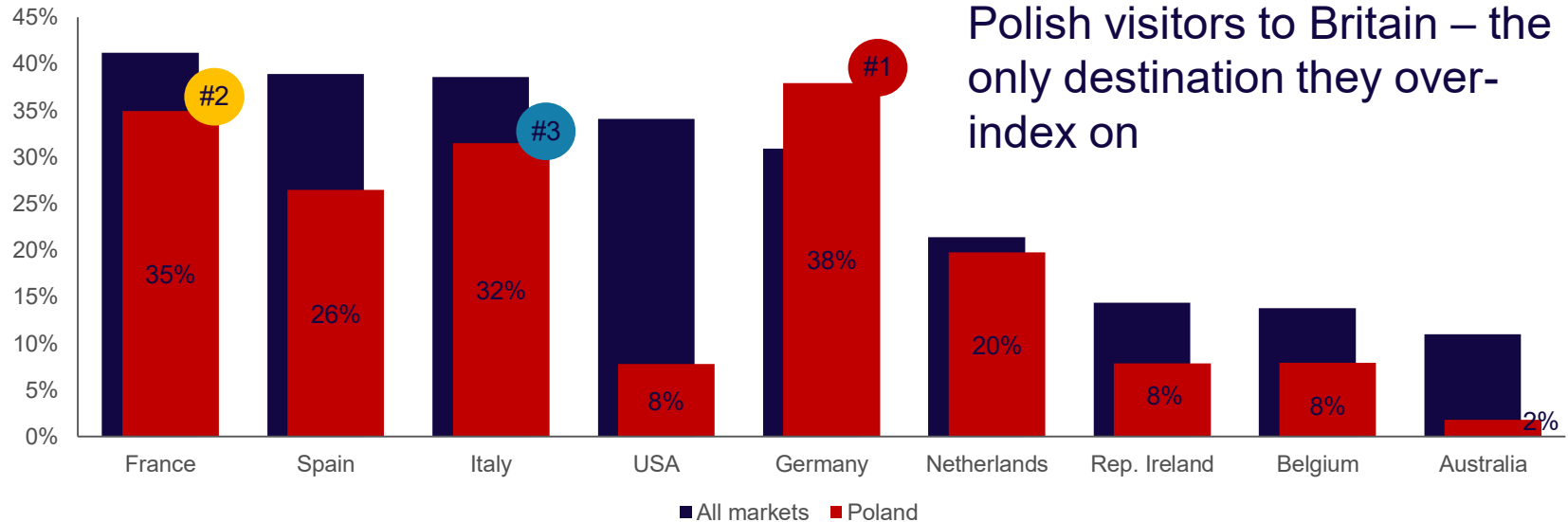
Norway

A little over half of holiday-makers to Britain from Norway have also visited Spain in the previous 5 years



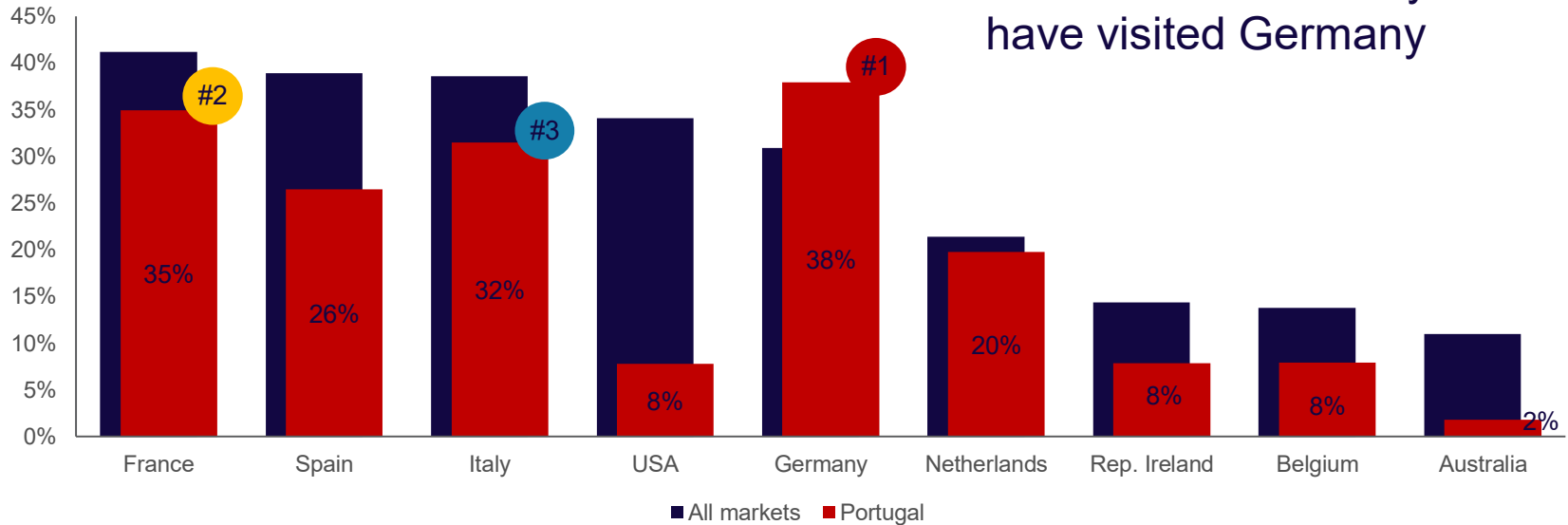
Poland

Germany is the most popular holiday destination amongst Polish visitors to Britain – the only destination they over-index on



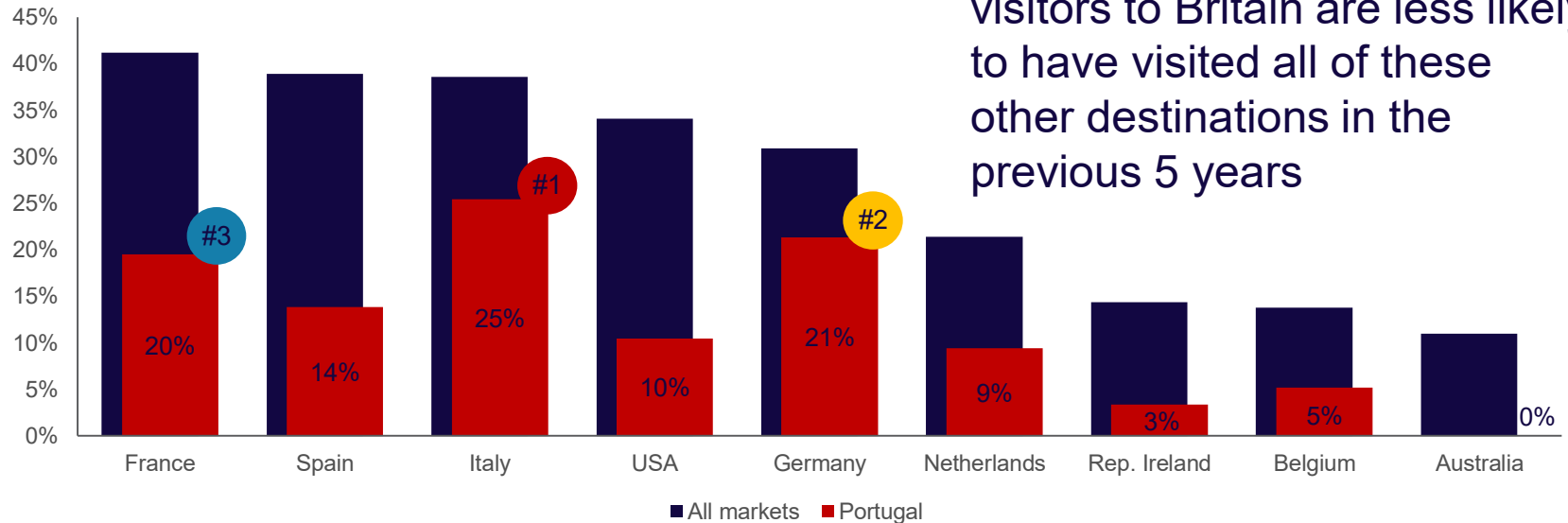
Portugal

Portuguese leisure visitors to the UK are most likely to have visited Germany



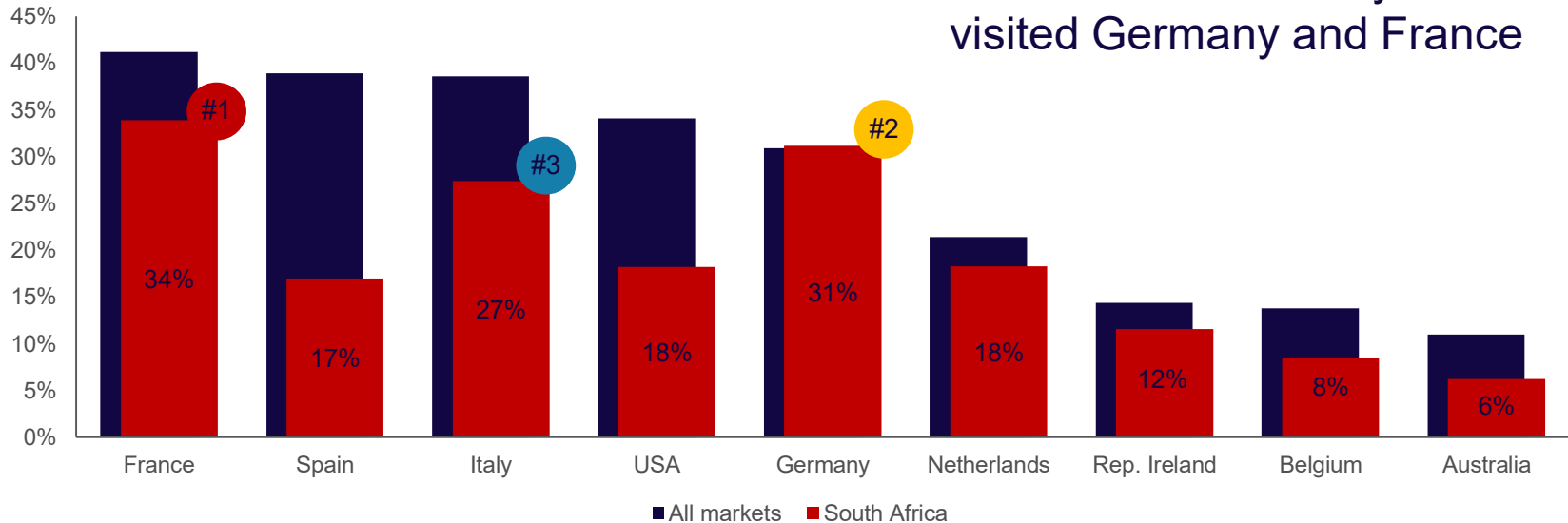
Romania

Compared to the all-market proportions, Romanian leisure visitors to Britain are less likely to have visited all of these other destinations in the previous 5 years



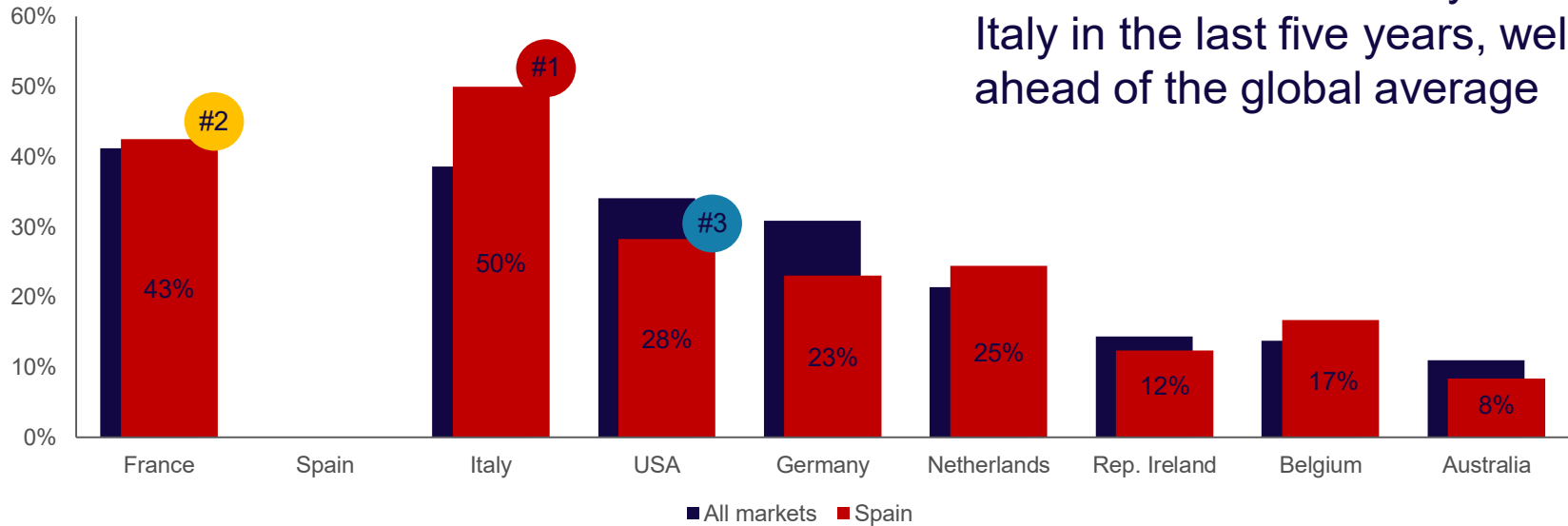
South Africa

South African leisure visitors to the UK are most likely to have visited Germany and France



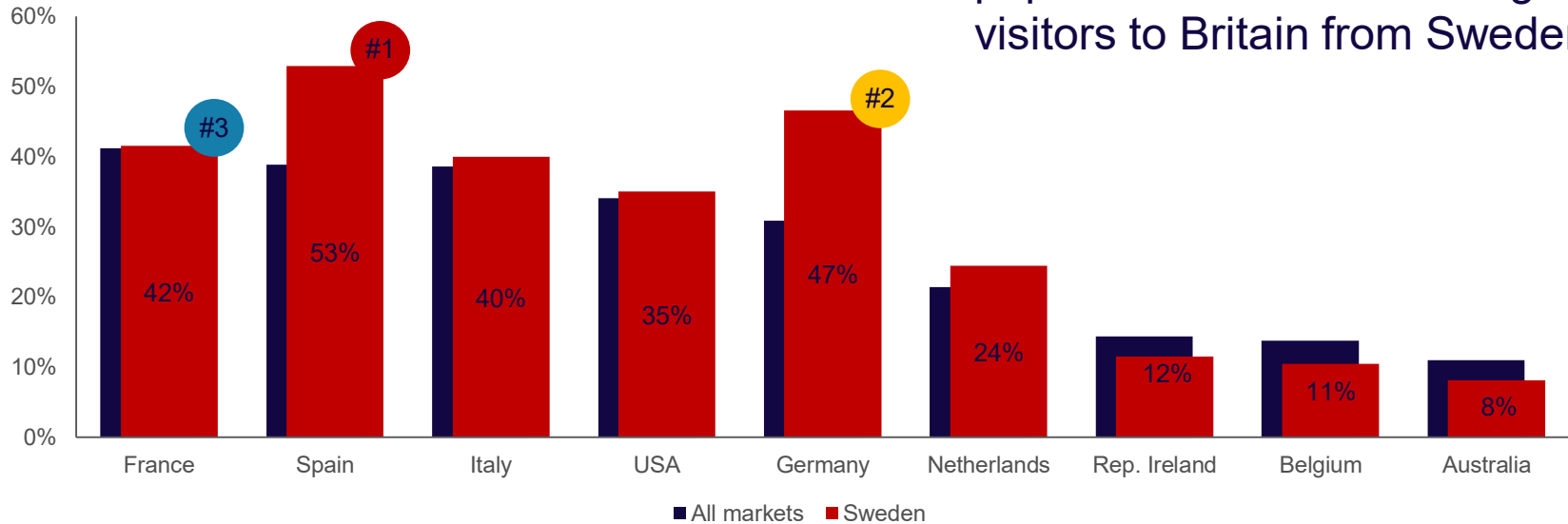
Spain

Half of Spanish visitors to Britain have also holidayed in Italy in the last five years, well ahead of the global average



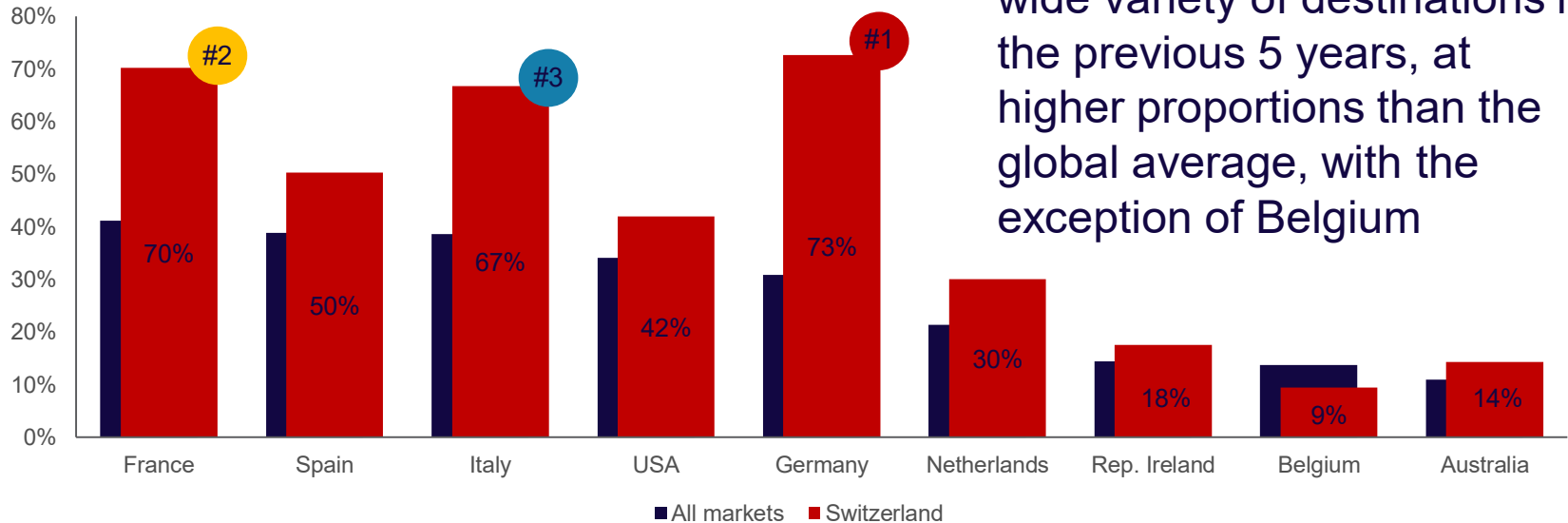
Sweden

Germany and Spain are popular destinations amongst visitors to Britain from Sweden



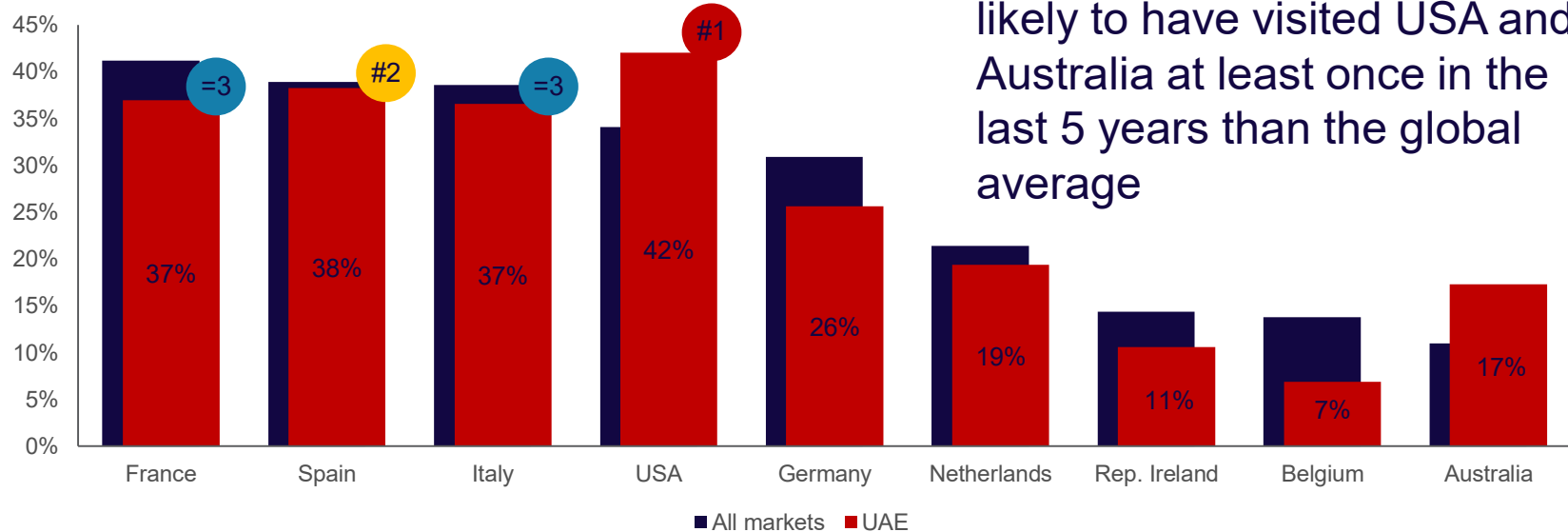
Switzerland

Visitors to Britain from Switzerland have visited a wide variety of destinations in the previous 5 years, at higher proportions than the global average, with the exception of Belgium



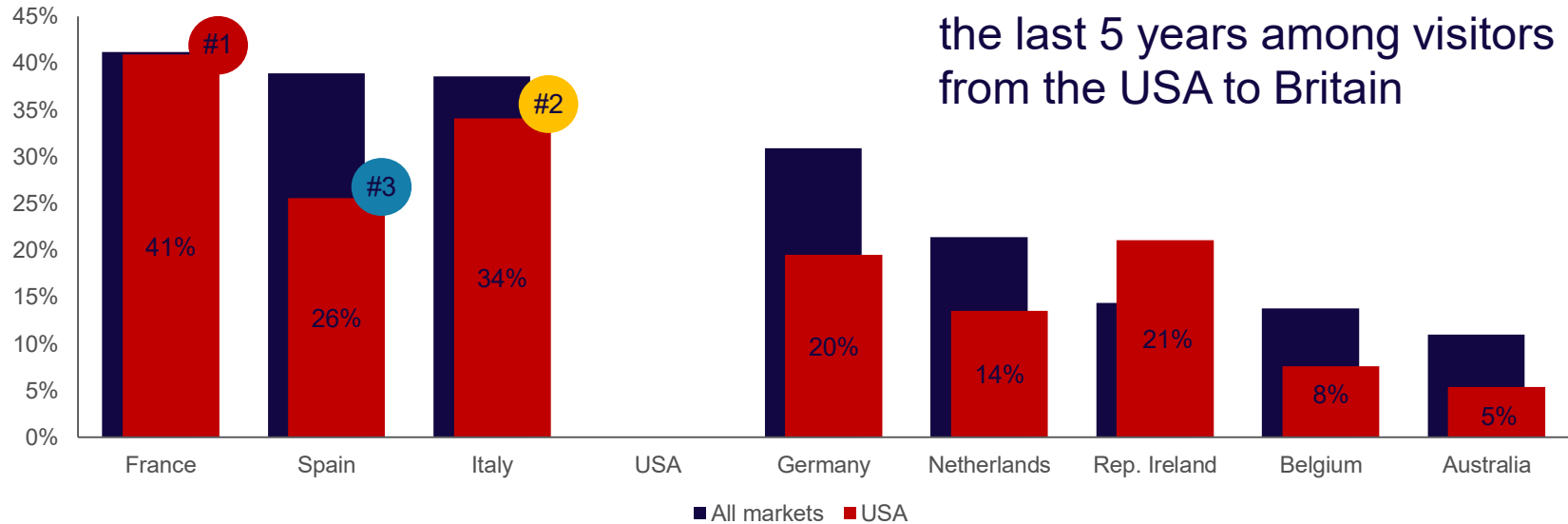
United Arab Emirates

Recent holiday visitors to Britain from the UAE are more likely to have visited USA and Australia at least once in the last 5 years than the global average



USA

The Irish Republic over indexes as another destination visited in the last 5 years among visitors from the USA to Britain





Further Resources

Further Resources

- **Multi country visits (October 2017)** <https://www.visitbritain.org/understanding-international-visitors>
 - While the majority of visits to the UK in 2016 did not include a visit to another country in their travel itinerary, 13% did – or 4.2 million visits.
 - Long haul markets such as Mexico, Australia and Brazil were most likely to include a country before their UK stay.
 - Countries in the Asia Pacific region accounted for 7 of the top 10 markets for visiting another country after leaving the UK.
 - The Eastern European countries of Hungary, Romania, Bulgaria and Poland feature in the top 10 markets for those most likely to visit another country both on the way to the UK and after leaving. These visitors are dominated by lorry drivers.
- **First time and repeat (January 2017)** <https://www.visitbritain.org/visitor-economy-facts>
 - In 2015, 77% of inbound visits were repeat visits, spending £15.1 billion in the UK.
 - Repeat holiday visitors are likely to stay longer on their trip to the UK than first-time visitors, and spend more on average per night and overall on their trip, indicating how valuable it is to continue to encourage visitors to return.
 - In 2015, 92% of business visits were repeat visits, 85% of visits to friends and family, and 63% of holiday visits.
 - Certain markets are more likely to make repeat visits to the UK: 92% of holiday visits from Irish Republic, 92% from Norway, 83% from Iceland and 80% from Belgium were repeat visits in 2015.
- **Britain and competitors (November 2017)** <https://www.visitbritain.org/Britain's-image-overseas>
 - This report explores 3 areas: Perceptions of Britain and its competitors, destinations considered as alternatives to Britain and levels of knowledge respondents hold of Britain and its competitor.

Market Profiles

VisitBritain produces a number of market focused reports, incorporating all of our insights and research relevant to the market. In particular Section 1.3 (Britain and competitive set data) in each market profile has strong relevance to this report.

There are 23 in total from Argentina to USA and can be found on our website here:

<https://www.visitbritain.org/markets>





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