State of the Nation

Richard Nicholls and Keri Portas, VisitBritain
October 2016
State of the Nation

1. Inbound picture – latest update
2. Medium/long term view
3. Inbound prospects for Q4 2016 and beyond
4. Planning a holiday
5. Booking a holiday
6. How the world views Britain’s food
Inbound picture – latest update
IPS topline year to date

<table>
<thead>
<tr>
<th></th>
<th>Q1 (Jan-Mar) Revised data</th>
<th>Q2 (Apr-Jun) provisional data</th>
<th>July</th>
<th>Year to date (Jan – July)</th>
</tr>
</thead>
<tbody>
<tr>
<td>% change vs. 2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALL VISITS (000)</td>
<td>8%</td>
<td>-2%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Spend (£ million)</td>
<td>-2%</td>
<td>-6%</td>
<td>4%</td>
<td>-3%</td>
</tr>
</tbody>
</table>

- Increase in visits in Jan-March, decline in April-June, but growth in visits and spending in July
- 3.8m visits in July was a record for any month

Source: International Passenger Survey, July provisional data
Journey purpose and global region

Growth for all non-holiday journey purposes

<table>
<thead>
<tr>
<th>Growth in visits</th>
<th>JULY 2016</th>
<th>LAST 3 MONTHS (MAY - JUL)</th>
<th>YEAR TO DATE (JAN - JUL 2016)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% change vs. July 2015</td>
<td>% change vs. May '15 - Jul '15</td>
<td>% change vs. Jan - Jul '15</td>
</tr>
<tr>
<td>Holiday</td>
<td>-5%</td>
<td>-6%</td>
<td>-5%</td>
</tr>
<tr>
<td>Visiting Friends and Relatives</td>
<td>8%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Business</td>
<td>0%</td>
<td>-3%</td>
<td>3%</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>23%</td>
<td>11%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey, July provisional data
## Journey purpose and global region

Growth year to date from Europe and North America

<table>
<thead>
<tr>
<th>Growth in visits</th>
<th>JULY 2016</th>
<th>LAST 3 MONTHS (MAY - JUL)</th>
<th>YEAR TO DATE (JAN - JUL 2016)</th>
</tr>
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<tr>
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</tr>
<tr>
<td>Holiday</td>
<td>-5%</td>
<td>-6%</td>
<td>-5%</td>
</tr>
<tr>
<td>Visiting Friends and Relatives</td>
<td>8%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Business</td>
<td>0%</td>
<td>-3%</td>
<td>3%</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>23%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>EU15</td>
<td>2%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Other EU</td>
<td>14%</td>
<td>2%</td>
<td>12%</td>
</tr>
<tr>
<td>Rest of Europe</td>
<td>-31%</td>
<td>-4%</td>
<td>1%</td>
</tr>
<tr>
<td>North America</td>
<td>5%</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>Rest of World</td>
<td>6%</td>
<td>0%</td>
<td>-1%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey, July provisional data
Market volume and value: rolling 12 months

UAE and China show strong growth rates for volume and value

<table>
<thead>
<tr>
<th>Country of residence</th>
<th>Visits (000s)</th>
<th>Spending (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Growth</td>
<td>Growth</td>
</tr>
<tr>
<td>Australia</td>
<td>1,057</td>
<td>0%</td>
</tr>
<tr>
<td>Belgium</td>
<td>1,180</td>
<td>6%</td>
</tr>
<tr>
<td>Brazil</td>
<td>294</td>
<td>-6%</td>
</tr>
<tr>
<td>Canada</td>
<td>699</td>
<td>5%</td>
</tr>
<tr>
<td>China</td>
<td>270</td>
<td>40%</td>
</tr>
<tr>
<td>France</td>
<td>4,084</td>
<td>1%</td>
</tr>
<tr>
<td>Germany</td>
<td>3,366</td>
<td>5%</td>
</tr>
<tr>
<td>India</td>
<td>423</td>
<td>10%</td>
</tr>
<tr>
<td>Irish Republic</td>
<td>2,668</td>
<td>6%</td>
</tr>
<tr>
<td>Italy</td>
<td>1,802</td>
<td>-1%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1,953</td>
<td>1%</td>
</tr>
<tr>
<td>Norway</td>
<td>766</td>
<td>-11%</td>
</tr>
<tr>
<td>Poland</td>
<td>1,812</td>
<td>18%</td>
</tr>
<tr>
<td>Russia</td>
<td>164</td>
<td>-31%</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>147</td>
<td>9%</td>
</tr>
<tr>
<td>Spain</td>
<td>2,255</td>
<td>10%</td>
</tr>
<tr>
<td>Sweden</td>
<td>864</td>
<td>2%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>886</td>
<td>3%</td>
</tr>
<tr>
<td>UAE</td>
<td>357</td>
<td>30%</td>
</tr>
<tr>
<td>USA</td>
<td>3,309</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey, Q1 revised data
Regions and nations

• Visits to London and Rest of England both up by 8% in latest rolling year
• Scotland up 27% in Q1 after a decline in 2015 (following a strong 2014)
• Wales up 4%
• Regions/nations and markets Q2 data out this Thursday

<table>
<thead>
<tr>
<th></th>
<th>Q2 2014 - Q1 2015</th>
<th>Q2 2015 - Q1 2016</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total UK</td>
<td>34,516</td>
<td>36,650</td>
<td>6%</td>
</tr>
<tr>
<td>Scotland</td>
<td>2,700</td>
<td>2,679</td>
<td>-1%</td>
</tr>
<tr>
<td>Wales</td>
<td>940</td>
<td>977</td>
<td>4%</td>
</tr>
<tr>
<td>London</td>
<td>17,463</td>
<td>18,835</td>
<td>8%</td>
</tr>
<tr>
<td>Rest Of England</td>
<td>14,345</td>
<td>15,429</td>
<td>8%</td>
</tr>
<tr>
<td>North East</td>
<td>479</td>
<td>582</td>
<td>22%</td>
</tr>
<tr>
<td>North West</td>
<td>2,570</td>
<td>2,676</td>
<td>4%</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>1,359</td>
<td>1,301</td>
<td>-4%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>1,944</td>
<td>2,208</td>
<td>14%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>1,033</td>
<td>1,171</td>
<td>13%</td>
</tr>
<tr>
<td>East Of England</td>
<td>2,132</td>
<td>2,212</td>
<td>4%</td>
</tr>
<tr>
<td>South West</td>
<td>2,229</td>
<td>2,441</td>
<td>10%</td>
</tr>
<tr>
<td>South East</td>
<td>4,682</td>
<td>5,171</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey, Q1 revised data
Competitors

Total global tourism up 4%

First half of 2016:
• UK +2.2%
• W. Europe +0.7%
• S. Europe +1.6%
• N. Europe +5.2%
• CE Europe +5.2%

In 2015 UK visits growth was fractionally above global and Europe total

Source: UNWTO
Medium/long term view
# 2015: top markets

China and Saudi Arabia break into top ten spending markets for the first time

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>France</td>
<td>4,171</td>
<td>1</td>
<td>USA</td>
<td>£3,010</td>
</tr>
<tr>
<td>2 (3)</td>
<td>USA</td>
<td>3,266</td>
<td>2 (3)</td>
<td>France</td>
<td>£1,493</td>
</tr>
<tr>
<td>3 (2)</td>
<td>Germany</td>
<td>3,249</td>
<td>3 (2)</td>
<td>Germany</td>
<td>£1,378</td>
</tr>
<tr>
<td>4</td>
<td>Ireland</td>
<td>2,632</td>
<td>4</td>
<td>Australia</td>
<td>£1,113</td>
</tr>
<tr>
<td>5</td>
<td>Spain</td>
<td>2,197</td>
<td>5</td>
<td>Spain</td>
<td>£999</td>
</tr>
<tr>
<td>6</td>
<td>Netherlands</td>
<td>1,897</td>
<td>6 (7)</td>
<td>Ireland</td>
<td>£934</td>
</tr>
<tr>
<td>7</td>
<td>Italy</td>
<td>1,794</td>
<td>7 (6)</td>
<td>Italy</td>
<td>£890</td>
</tr>
<tr>
<td>8</td>
<td>Poland</td>
<td>1,707</td>
<td>8</td>
<td>Netherlands</td>
<td>£676</td>
</tr>
<tr>
<td>9</td>
<td>Belgium</td>
<td>1,175</td>
<td>9 (11)</td>
<td>China</td>
<td>£586</td>
</tr>
<tr>
<td>10</td>
<td>Australia</td>
<td>1,043</td>
<td>10 (17)</td>
<td>Saudi Arabia</td>
<td>£556</td>
</tr>
</tbody>
</table>

Spend per visit:
1. Saudi £3,769
2. Kuwait £2,898
3. China £2,174

... 
68. Poland £257
69. Hungary £208
70. Lithuania £202

Source: International Passenger Survey
Visits up by 5% again but spend per visit down

Year-on-year change in visits and spending

Source: International Passenger Survey
Holidays have grown fastest long term though less so recently

Visits to the UK by journey purpose (000s)

Source: International Passenger Survey
Regional spread

Distribution of visitor nights

Proportion of visitor nights outside London:
- Holidays 47%
- Misc 57%
- Business 58%
- VFR 68%
- Study 73%

Proportion of holiday nights outside London:
- Ireland 71%
- Germany 65%
- Australia 57%
- China 53%
- USA 48%
- France 48%
- Saudi 25%
- Brazil 17%

Source: International Passenger Survey, 2013-15
Inbound prospects for Q4 2016 and beyond
Sterling down 18-19% year on year against $/€

Value of US dollar and euro against pound. Data to October 7th.

Sterling down (Sep-15 to Sep-16):
- 20% against Aus$
- 15% against Can$
- 13% against Swedish Krona
- 14% against Swiss Franc
- 14% against UAE Dirham
- 10% against Chinese Yuan
Bookings boost?

Flight bookings pick up in the weeks after the referendum

European and Non-European Net Bookings for Arrivals in the UK
(Booking dates from May 27th 2016 to June 23rd and June 24th to July 21st 2016 vs. same period last year)

- Total: +7.1% (4.3%)
- Europe: +5.0% (-1.8%)
- Non-Europe: +8.7% (8.6%)

Source: Forward Keys
Flight bookings

What are prospects for the rest of the year?

• Bookings from arrival in August were significantly down year on year pre referendum – by month end were down though by a much lesser degree!
• NB this data does not map directly onto IPS visits data
• Q4 2016 bookings looking more promising especially from long haul:
  - Europe up 1%
  - USA up 6%
  - India up 11%
  - China up 24%
  - Although we will probably see a decline from rugby-playing long haul markets!

Source: Forward Keys
GDP growth – medium term trend

Real GDP growth, by market

Source: Oxford Economics
Tourism outlook for 2017 and beyond

- 5.8% visits growth forecast for 2017
- Holiday forecast revised up post referendum
- But business tourism forecast revised down

Source: Tourism Economics
Planning and Booking a holiday
Planning and Booking research details

- Study carried out by VisitBritain and research agency IPSOS
- Fieldwork carried out earlier in 2016
- 20 markets, including 8 European markets
- Questions asked of both Visitors and also those considering visiting the UK (Considerers)
- More in depth reports to be released on the VisitBritain website later this year!
Planning a holiday
What are the stages of planning a holiday?

STAGE 1: Research Destinations

STAGE 2: Shortlist options

STAGE 3: Final Choice

STAGE 4: Make the Booking

Source: IPSOS/Visit Britain
Responsibilities during the planning process

- **Researching** and **booking** are more likely to be done by the individual.

- **Shortlisting** and **finalising a destination** are done in consultation with the travel companion.

Source: IPSOS/Visit Britain. Q1: Who is most likely to do the following when it comes to your holidays? Base: All Respondents (1140)
How long is the planning process?

- Almost half (49%) start **thinking about their trip** more than 6 months in advance of taking it.
- The **decision on destination** is likely to be made between 3 and 6 months for 40% and more than 6 months in advance for 32%.
- **Booking lead time** varies, 34% booked their trip 3-6 months in advance, 30% booked 1-2 months in advance, and 22% booked less than a month in advance.

Source: IPSOS/Visit Britain. QRS: Thinking about your holiday to Britain, how far in advance did you…?
Base: All Respondents (11400)
How far in advance to people book their trip?

• Long haul visitors from **Gulf, Russia, India** and **China** are most likely to book their trip just a few weeks in advance, yet over a third of visitors from **Australia** and **New Zealand** do this 6+ months in advance.

• Among short haul, **Germany** tends to book their trip much earlier, with over half (59%) preferring to book at least 3 months before travelling. Markets such as **France, Spain** and **Netherlands** are more likely to book travel less than a month before.

### % booking the trip at each stage

<table>
<thead>
<tr>
<th></th>
<th>AUS</th>
<th>USA</th>
<th>CAN</th>
<th>NZ</th>
<th>BRA</th>
<th>RUS</th>
<th>IND</th>
<th>CHI</th>
<th>JAP</th>
<th>KOR</th>
<th>SAU</th>
<th>UAE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>6+ months before trip</strong></td>
<td>35%</td>
<td>20%</td>
<td>18%</td>
<td>38%</td>
<td>23%</td>
<td>8%</td>
<td>10%</td>
<td>8%</td>
<td>11%</td>
<td>10%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>3-6 months before</strong></td>
<td>38%</td>
<td>31%</td>
<td>37%</td>
<td>33%</td>
<td>37%</td>
<td>23%</td>
<td>20%</td>
<td>13%</td>
<td>37%</td>
<td>22%</td>
<td>22%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>1-2 months before</strong></td>
<td>14%</td>
<td>17%</td>
<td>24%</td>
<td>15%</td>
<td>22%</td>
<td>34%</td>
<td>35%</td>
<td>32%</td>
<td>37%</td>
<td>38%</td>
<td>27%</td>
<td>20%</td>
</tr>
<tr>
<td><strong>Less than 1 month</strong></td>
<td>11%</td>
<td>25%</td>
<td>19%</td>
<td>10%</td>
<td>15%</td>
<td>32%</td>
<td>32%</td>
<td>44%</td>
<td>12%</td>
<td>25%</td>
<td>34%</td>
<td>38%</td>
</tr>
</tbody>
</table>

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

**Base:** Visitors (5700), Australia (300), Brazil (300), Canada (300), China (300), India (300), Japan (300), New Zealand (300), Russia (300), Saudi Arabia (175), South Korea (300), United Arab Emirates (125), United States (300), Denmark (300), France (300), Germany (300), Italy (300), Netherlands (300), Norway (300), Spain (300), Sweden (300)
Key online and offline influences

- **Word of mouth** is the biggest influence (40%).
- **Online influences are strong**, with search engines used by a third (33%) and price comparison sites and traveller review sites used by 31% and 30%.
- **Social networks** are an important influence for one in four (26%).
- **Traditional methods** of influence such as guidebooks and brochures are still used; 25% would say a travel guidebook is a key influence, and 18% have used travel brochures, and 17% official brochures for the country or city they are visiting.

**Top 5 online influences**
- Search engines: 33%
- Price comparison sites: 31%
- Traveller review sites: 30%
- Friend / family on social networks: 26%
- Accommodation / hotel website: 26%

**Top 5 offline influences**
- Talking to friends / family: 40%
- Travel guidebooks: 25%
- Travel TV programs: 19%
- Travel / tour operator brochure: 18%
- Official tourist brochure: 17%
QR2 & QR3: (Visitors) Thinking about your holiday to Britain, which of the following information sources influenced your choice of destination? (Considerers) Thinking about the last holiday you took to a foreign country, which of the following information sources influenced your choice of destination?

Base: All Respondents (11400), 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

- **Cultural attractions** remains the key motivator for Visitors and Considerers to Britain.
- **Deals** are a strong driver for a third of Considerers 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, followed by the variety of locations on offer and having wanted to go somewhere new.

Top motivators to visit Britain

<table>
<thead>
<tr>
<th></th>
<th>Visitors</th>
<th>Considerers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural attractions</td>
<td>47%</td>
<td>44%</td>
</tr>
<tr>
<td>Variety of places</td>
<td>29%</td>
<td>25%</td>
</tr>
<tr>
<td>Somewhere new</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Countryside &amp; natural beauty</td>
<td>31%</td>
<td>22%</td>
</tr>
<tr>
<td>Easy to get around</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Vibrant cities</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Possibility to visit friends and family</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>Possibility to speak English</td>
<td>12%</td>
<td>18%</td>
</tr>
<tr>
<td>Ease of getting to UK</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>Different culture</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Mix of old and new</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Good deals</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Sampling local food and drink</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>Security / safety</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>Accommodation variety and quality</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Cost of destination</td>
<td>24%</td>
<td>21%</td>
</tr>
</tbody>
</table>

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 - key market differences

- Visiting family and friends a key driver for Australia and New Zealand.
- Ease of getting to UK – France
- Climate – key for Saudi Arabia, India, UAE.

**Key Market Differences**

- **Wanted to try somewhere new**
  (RUS 48% v 25% total)

- **Ease of getting there**
  (FR 44% v 21% total)

- **Variety of places to visit around country**
  (DE 41% v 27% total)

- **A good deal**
  (SP 35% v 25% total)

- **Climate / Weather**
  (SAU 35%, IND 32%, UAE 30% v 15% total)

- **Different culture**
  (BRA 39% v 20% total)

- **Variety of places to visit around country**
  (IND 39% v 27% total)

- **Vibrant cities**
  (SW 30% v 20% total)

- **Security and Safety**
  (JAP 35% v 19% total)

- **Cultural attractions**
  (KOR 56% v 44% total)

- **Possibility of visiting friends and family**
  (AU 32%, NZ 50% v 17% total)

- **Sampling local food and drink**
  (CHI 41% v 21% total)

**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 (11400), 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)
Booking a holiday
How did people book their travel and accommodation?

• Among those that have been to Britain, the booking process is split very much half in half.

• However this does differ between short and long haul markets.

• Those in close proximity to the UK are more likely to book travel and accommodation separately, whilst over half of long haul travellers to the UK prefer to book the elements together.

QB1: Which of the following best describes how you booked your holiday to Britain? If someone else made the booking, how did they book the holiday?

Base: Visitors (5700), Long haul (3300), Short haul (2400)
QB1: Thinking about the last holiday you took to a foreign country: which of the following best describes how you booked your holiday? If someone else made the booking, how did they book the holiday?

Base: Visitors (5700), Australia (300), Brazil (300), Canada (300), China (300), India (300), Japan (300), New Zealand (300), Russia (300), Saudi Arabia (175), South Korea (300), United Arab Emirates (125), United States (300), Denmark (300), France (300), Germany (300), Italy (300), Netherlands (300), Norway (300), Spain (300), Sweden (300)

- Most individual markets follow the same trend as long haul/short haul
- Australia and New Zealand are the exception in that they are more likely to book travel and accommodation separately.
How did visitors book their trip to Britain?

- Most bookings to Britain were done **online**.
- Almost 1 in 5 visitors who booked accommodation separately **stayed with friends/relatives**.
- Almost 30% visitors who booked a holiday did it **face to face**.

Method of booking trip

- **Travel separately**: 85%
- **Accommodation separately**: 70%
- **Holiday (travel & accommodation booked together)**: 64%

**QB3:** Thinking about the last holiday you took to a foreign country: which of the following best describes how you booked your holiday? If someone else made the booking, how did they book the holiday?

**Base:** Booked travel and accommodation separately (2569), Booked travel and accommodation together (2703)
Trip booking by market

- Over 80% of holidays booked in the following markets are booked online – **China, Denmark, Netherlands, Norway and Sweden.**

- **Australia, Germany, New Zealand, Russia, Spain, UAE** – over a third in these markets are booking their holidays face to face. Over half are doing so in Russia.

| HOLIDAY (TRAVEL + ACCOM) | AUS | BR | CAN | CHI | DEN | FRA | GER | IND | ITA | JAP | NET | NZ | NOR | RUS | SAU | KOR | SPA | SWE | UAE | USA |
|-------------------------|-----|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| **Online**              | 53  | 61 | 71  | **82** | **82** | 78  | 58  | 76  | 68  | 58  | **81** | 49  | **86** | 41  | 45  | 59  | 66  | 83  | 52  | 58  |
| **Face to face**        | 37  | 31 | 21  | 13  | 4   | **17** | 36  | 16  | 28  | 32  | 10  | **42** | 1   | **56** | 29  | 23  | 33  | 9   | 34  | 24  |
| **By phone**            | 9   | 8  | 7   | 5   | 10  | 2   | 5   | 8   | 2   | 10  | 6   | 7   | 6   | 3   | 24  | 16  | 1   | 6   | 15  | 17  |
| **Don’t know**          | 1   | 2  | 4   | 3   | 1   | 2   | 4   | 1   | 7   | 1   | 2   | 2   | 2   | 3   |     |     |     |     |     |     |

• Over 80% of holidays booked in the following markets are booked online – **China, Denmark, Netherlands, Norway and Sweden.**

• **Australia, Germany, New Zealand, Russia, Spain, UAE** – over a third in these markets are booking their holidays face to face. Over half are doing so in Russia.
What device did online bookers use?

- Most bookings are done on **laptops**, however those booking the complete holiday are slightly more likely to use their smartphone to book.
- Those from China, India, Gulf and South Korea are more likely to use smartphones or tablets to book their trip.

[Diagram showing device usage for different types of bookings:]
- **Travel only**: 79% on laptops, 8% on smartphones, 7% on tablets.
- **Accommodation only**: 76% on laptops, 9% on smartphones, 9% on tablets.
- **Holiday (Both travel & accommodation)**: 66% on laptops, 10% on smartphones, 9% on tablets.

QB5: And what did you use to book the following?

**Base:** Booked travel and accommodation separately (5120), Booked travel and accommodation separately and didn’t stay with friends (3816), Booked travel and accommodation together (5964)
Online travel agency opinions

More than two thirds agree that online travel agencies are good for **comparing prices**, are **easy to use** and good for finding something **within budget**.

- **Low brand loyalty** as only a third would book with the same agency each time.
- Also, **few value the human touch** of booking via phone or face to face (just 38%).

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree</th>
</tr>
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<tbody>
<tr>
<td>I often compare prices from the websites of multiple online travel agencies</td>
<td>71%</td>
</tr>
<tr>
<td>They are easy to use</td>
<td>69%</td>
</tr>
<tr>
<td>Online travel agencies are a good way of finding a destination within my budget</td>
<td>67%</td>
</tr>
<tr>
<td>I get a wider choice in one place than when I book with an individual provider…</td>
<td>61%</td>
</tr>
<tr>
<td>Best way of getting the lowest price</td>
<td>56%</td>
</tr>
<tr>
<td>Good customer service if there is a problem with the booking/trip</td>
<td>45%</td>
</tr>
<tr>
<td>There is not much difference between online travel agencies</td>
<td>41%</td>
</tr>
<tr>
<td>I prefer the human touch when booking via phone or face to face</td>
<td>38%</td>
</tr>
<tr>
<td>I usually book with one specific online travel agency rather than considering…</td>
<td>34%</td>
</tr>
</tbody>
</table>
What did travellers to Britain do before booking their holiday to get the best deal?

- Only 1 in 10 booked without doing any kind of price comparison.
- Just under half did a direct comparison themselves, and slightly fewer used a price comparison site.
- A quarter discussed prices with their friends before booking.

QR7: To what extent do you agree with the following statements about booking travel through online travel agencies such as Lastminute.com or Expedia?

- Compared prices directly via company websites: 45%
- Researched prices via travel websites or forums: 44%
- Compared prices via travel agents/operators/comparison: 43%
- Looked up prices using search engines: 43%
- Talked about prices with friends by phone, email or in person: 27%
- Talked about prices with friends on social media: 19%
- Did no price comparison before booking: 11%

Base: All participants (1140)
What do travellers expect to buy on their holiday?

- In terms of transport, 43% would sort **airport transfers** and a third would organise **train travel before arriving** in Britain. Over half would get their London travel during their visit.
- **Theatre tickets** are most likely to be booked in advance, as would sporting event tickets. For most, guided tour tickets and for other tourist attractions are likely to be bought during the trip.

<table>
<thead>
<tr>
<th></th>
<th>Coach travel/Long distance bus</th>
<th>Airport transfer</th>
<th>Transport within London</th>
<th>Train Travel</th>
<th>Flights within the UK</th>
<th>Car hire</th>
<th>Ticket to theatre/musical/concert</th>
<th>Ticket to sports events</th>
<th>Guided sightseeing tours in London</th>
<th>Guided sightseeing tours outside London</th>
<th>Tickets for other tourist attractions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before visit</td>
<td>27%</td>
<td>43%</td>
<td>27%</td>
<td>30%</td>
<td>34%</td>
<td>32%</td>
<td>34%</td>
<td>27%</td>
<td>31%</td>
<td>31%</td>
<td>34%</td>
</tr>
<tr>
<td>During my visit</td>
<td>32%</td>
<td>31%</td>
<td>57%</td>
<td>38%</td>
<td>12%</td>
<td>19%</td>
<td>29%</td>
<td>15%</td>
<td>31%</td>
<td>28%</td>
<td>46%</td>
</tr>
<tr>
<td>Did not buy/exp</td>
<td>41%</td>
<td>26%</td>
<td>16%</td>
<td>33%</td>
<td>54%</td>
<td>49%</td>
<td>37%</td>
<td>58%</td>
<td>38%</td>
<td>41%</td>
<td>20%</td>
</tr>
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**Q8: Visiting: Did you buy the following when you visited Britain and, if so, when? / Considerers: Do you expect you would buy the following if you travel to Britain?**

**Base:** All participants (11400)
In summary…

• Almost half (49%) start thinking about a holiday more than 6 months in advance of taking it.
• Booking lead time varies; China and UAE have the shortest lead time with many booking less than a month before travelling.
  • Over half of travellers from Australia and New Zealand have booked at least three months in advance.
• Britain’s cultural attractions are the top reason for visiting, or those considering visiting the UK.
  • The possibility of visiting friends and family is key for Australia and New Zealand travellers.
  • Climate is a driver for Saudi Arabia, India and UAE.
• Half of visitors booked their travel and accommodation separately and half booked as a package deal.
  • Short haul markets are most likely to book separately, as are travellers from Australia and New Zealand.
• Most bookings are done online, with China, Denmark and Sweden the most likely to do this.
  • Over half of holiday bookings from Russia take place face to face.
• Laptops are the most used device for online bookings.
  • However, China, India, Gulf and South Korea are more likely than average to book using a Smartphone or Tablet.
How the world views Britain’s food
Reasons for visiting Britain

• Amongst holiday visitors to the UK in 2015, **food was not often cited as a top reason** for visiting the UK.
• The most mentioned reasons were for heritage and history (36%), culture (30%) and to see world famous places (29%).
• Going out to eat and drink is a key reason for just 5% of UK visitors, showing that it is not a strong driver why visitors chose Britain as a destination.

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=12,025
Interest in trying local and food and drink in Britain

• In the 2014 Nation Brands Index study, we saw that there was a high level of interest in trying British food and drink, with 55% interested in doing this on a holiday to Britain.

• Trying local food and drink rated ahead of interest in seeing famous attractions (49%) and visiting big cities (47%).

Source: GFK NBI July 2014. Imagine that you are going to be spending a week on holiday exploring Britain. To what extent would you be interested in doing each of the following things? 7 point scale, ‘Completely interested’ to ‘Completely not interested’
Base: n=500 per market
Interest in trying British dishes

• We asked which specific British dishes foreign visitors and considerers would like to try.
• The typical Full English Breakfast is the most popular dish with 49% saying they would like to try this if on a hypothetical holiday to Britain. After this dish, the next most popular is the Roast Dinner with 46% interested in trying.

Source: GFK NBI 2015. Imagine that you are going to be visiting Britain on holiday. To what extent would you be interested in trying the following British foods? (7 point scale)
Base: n=500 per market
Interest in trying other British food and drinks

- Many are keen to try lots of different types of British dishes and foods.
- There are two main themes coming through in particular – desserts and drinks.

Source: GFK NBI 2015. Imagine that you are going to be visiting Britain on holiday. To what extent would you be interested in trying the following British foods? ‘Other’
Base: All respondents who selected that they would like to try a dish not mentioned in the list n=2,152
Visitor satisfaction with Britain’s food and drink

• The majority (78%) of overnight visitors to the UK were **satisfied with the food and drink** that they experienced whilst in the UK.
• However, food and drink does score lower for satisfaction than two other elements that visitors were asked about, such as attractions / activities and transport. This confirms again that attractions and activities are a strong selling point for Great Britain ahead of our food and drink.

![Satisfaction with the following aspects during trip to UK](chart.png)

Source: ONS IPS 2015: How satisfied were you with your visit to the UK for: ‘Food and Drink’. On a scale of 1 – 5. Base: Departing overseas visitors who stayed at least 1 night. Total n=31,933