Experiences of expense and value for money; Holidays in Britain versus Italy and France
- Findings from visits June 2011-April 2012
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Ref: VIB001QT1

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Study background
Study Background

Key objective

- To evaluate the holiday experience offered by Britain in terms of absolute expense and relative value for money
- To identify key drivers of favourable and unfavourable value ratings
- To compare GB against key competitors

Focus on leisure traveller’s recent experience (visited within last 10 months)
- Sample definition: 18+ adults who have taken holiday of at least 2 nights in at least one of Britain, France or Italy sometime between June‘11 and the research interview in Apr ‘12

Evaluate separately among visitors from a selection of key markets:
- All chosen markets within top 10 source markets for volume or value and account for 35% of GB visits
- Major established long-haul markets
- And visitors from some established short-haul markets

Sample data was weighted;

- The sample for each of the three destination countries was weighted to match the known profile of GB visitors travelling from the seven visitor countries
  - To ensure GB results representative of GB leisure visitors (including demographics and market)
  - To provide comparability across destination countries (GB, Italy and France)
Example of main survey coverage used for GB, Italy and France

- Overall destination level ratings
  - Value for money
  - Expense versus other holidays (domestic)
  - Expense versus other holidays (international)
  - Overall experience

- Rating and experience of 8 key touch points/holiday elements
  - Travel to the destination country
  - Travel within towns/cities
  - Travel outside of towns/cities
  - Attractions
  - Accommodation
  - Entertainment
  - Shopping
  - Food & drink

- Rated first on expense and then value for money and then questions about what experiences/products/services featured in their holiday
When asking about value for money the survey clearly defined this as being different from just cost / expense

■ Firstly within the introduction:

‘By value for money we mean how fair you felt the price to be, for the quality or standard of goods /service or for how good or unique the experience was’

■ And then again for every section whenever a rating on value for money was asked:

— E.g.

‘Taking everything into account including overall experience, quality, size of portions, level of service, atmosphere of the place you ate or drank etc. how would you rate the food & drink in...(GB/Italy/France)... in terms of value for money?’

‘Overall, taking everything into account including the experience of the attractions, enjoyment, interest, uniqueness, any services you received, etc, how would you rate the value for money of visitor attractions in ...(GB/Italy/France)? ’
Overview of findings
Overview

- GB consistently rates below almost all major European destinations when visitors rate their holiday on either value for money or expense, indicating a clear competitive weakness.

- As is true of other capital cities, London negatively impacts ratings on holiday expense and value for money for the country as a whole. However, this is compounded by the fact that GB as a holiday destination is more dependent on its capital city than either Italy or France are on their capitals.

- Expense versus other holidays abroad is the biggest barrier to GB holidays being seen to be good value for money.

- Of all holiday elements food & drink and accommodation have the biggest influence on overall ratings for value for money and expense.

- Evidence suggests that the value for money of each individual holiday element (e.g. accommodation, attractions etc.) could potentially be improved by increasing usage of the specific experiences or products and services; those which elicit the best value ratings for each element.

- The main strengths of any GB products and services are ...
  - Bars/ pubs as a good place to eat out
  - Luxury hotels for those who can afford them or guest houses/ B&Bs for those with lesser budgets
  - Shopping whilst on holiday and among long-haul visitors the use of the tax refund scheme
  - Use of public transport and in particular the purchase of multiple or short season tickets / passes
  - GB attractions which do not charge entrance fees
Importance of cost and holiday experience when choosing a destination
Summary

- Importance of cost and holiday experience when choosing a destination

- Visitors claim that the experience offered by holidaying in GB, Italy or France far outweighs the importance of the overall expense

- Some differences are noted by market, regardless of which of the three destinations they visited;
  - Expense is less important for those travelling from Belgium and the Netherlands
  - Expense is understandably more important for long-haul visitors than for short-haul

- And some differences are evident by traveller type;
  - Expense is a bigger influence for families
  - And a lesser one among older visitors (65yrs+) and those visiting friends & family
  - The more money visitors pay for the holiday the greater the claimed importance of the experience
Visitors indicate that the importance of the experience offered by the destination far outweighs that of the expense. Although expense is understandably a greater influence for long-haul visitors whether they are visiting GB, Italy or France.

### Importance of expense and holiday experience offered, in decision to visit GB, France or Italy

#### The overall expense of visiting the destination

<table>
<thead>
<tr>
<th>Destination visited</th>
<th>GB</th>
<th>Italy</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long haul</td>
<td>7</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>Short haul</td>
<td>10</td>
<td>13</td>
<td>10</td>
</tr>
<tr>
<td>Overall</td>
<td>29</td>
<td>20</td>
<td>23</td>
</tr>
</tbody>
</table>

#### The holiday experience the destination offers

<table>
<thead>
<tr>
<th>Destination visited</th>
<th>GB</th>
<th>Italy</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long haul</td>
<td>26</td>
<td>32</td>
<td>62</td>
</tr>
<tr>
<td>Short haul</td>
<td>35</td>
<td>27</td>
<td>57</td>
</tr>
<tr>
<td>Overall</td>
<td>59</td>
<td>65</td>
<td>59</td>
</tr>
</tbody>
</table>

- Expense is a bigger influence for families than non-families.
- And to a lesser degree Women.
- But less of an influence for visitors aged 65yrs+
- The importance of the experience is more uniform across subgroups.

Base: Recent holiday visitors to GB (872), Italy (569) or France (576).
Q1: How important were the following in your decision to take a vacation/holiday in (the GB/Italy/France)?
There is no compelling evidence of a trade-off between expense and the holiday experience.
- Those who are more likely to say the expense of the holiday was important are also more likely to say that the experience was important in their decision to holiday in GB.

Importance of holiday experience offered in decision to visit GB: By importance of expense in decision to visit GB

- **Importance of expense in decision to holiday in GB**
  - **Not at all important**
  - **Extremely important**

- **Importance of cost in decision to holiday in GB**

- **NB:** It was also noted that the more visitors paid for their holiday the greater the importance of experience in their decision.

Base: Recent holiday visitors to GB (872)
Q1: How important were the following in your decision to take a vacation/holiday in (the GB/Italy/France)?
GB holidays in a competitive context:
Part 1. GB Versus main European destinations on expense and value for money
(By those having previously visited the destination for a holiday)
Summary
- GB Versus main European destinations on expense and value for money
(By those having previously visited the destination for a holiday)

- Holiday visitors rate GB as one of the most expensive main European destinations to visit for a holiday
  - Lowest of all among long-haul visitors

- Although rated better for value for money than expense (as is true for other destinations), GB still ranks among the lowest on value

- GBs rating for value for money and expense are both weaker among short-haul visitors than among long-haul visitors
  - but the ranking for GB against other destinations is slightly better among short-haul

- Both Italy and France are rated significantly better than GB for value for money and but neither of them ranks highly in the overall list of major European destinations
  - The same is true for expense (although only Italy's advantage is significant among both long-haul and short-haul visitors)
GB is reported as being one of the most expensive places to visit in Europe when comparing ratings among those who have visited the destinations for a holiday - GB expense rating is significantly worse among short-haul visitors than among long-haul (although the rank position is not quite as bad)

Major European destinations: Rating of holiday expense by holiday visitors: short-haul and long-haul

<table>
<thead>
<tr>
<th>Destinations</th>
<th>Long-haul</th>
<th>Short-haul</th>
<th>Short-haul minus Long-haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>6.5</td>
<td>6.7</td>
<td>+0.3</td>
</tr>
<tr>
<td>Spain</td>
<td>6.5</td>
<td>6.5</td>
<td>=</td>
</tr>
<tr>
<td>Greece</td>
<td>6.4</td>
<td>6.0</td>
<td>-0.1</td>
</tr>
<tr>
<td>Norway</td>
<td>6.2</td>
<td>5.9</td>
<td>-0.3</td>
</tr>
<tr>
<td>Austria</td>
<td>6.2</td>
<td>5.9</td>
<td>-0.1</td>
</tr>
<tr>
<td>Germany</td>
<td>6.0</td>
<td>6.0</td>
<td>=</td>
</tr>
<tr>
<td>Belgium</td>
<td>6.0</td>
<td>5.8</td>
<td>-0.2</td>
</tr>
<tr>
<td>Netherlands</td>
<td>5.9</td>
<td>5.3</td>
<td>-1.2</td>
</tr>
<tr>
<td>Italy</td>
<td>5.8</td>
<td>5.2</td>
<td>-0.6</td>
</tr>
<tr>
<td>France</td>
<td>5.3</td>
<td>4.2</td>
<td>-1.1</td>
</tr>
<tr>
<td>Switzerland</td>
<td>5.3</td>
<td>3.7</td>
<td>-1.6</td>
</tr>
<tr>
<td>GB</td>
<td>5.1</td>
<td>4.2</td>
<td>-0.9</td>
</tr>
</tbody>
</table>

Figures circled are significantly better than GB (Significance of >95%)

Only GB, Switzerland Ireland and Norway show significantly lower ratings among short-haul visitors than long-haul

*Base: Visited for holiday abroad in past five years; Austria (443), Belgium (380), France (673), Germany (734), GB (1145), Greece (412), Ireland (300), Italy (577), Netherlands (394), Norway (167), Spain (617), Switzerland (396)

Q53 How would you rate the cost of holidaying in the following countries? If you are not sure please just say what you would expect.
The position on value for money is also a comparative weakness for GB

France and Italy also rank in the bottom half among both short-haul and long-haul visitors (as was also the case on expense)

Major European destinations: Rating of holiday value for money by holiday visitors: Short-haul and Long-haul

<table>
<thead>
<tr>
<th>Destinations</th>
<th>Long-haul</th>
<th>Short-haul</th>
<th>Short-haul minus Long-haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>7.7</td>
<td>7.1</td>
<td>-0.3</td>
</tr>
<tr>
<td>Ireland</td>
<td>7.5</td>
<td>6.9</td>
<td>-0.6</td>
</tr>
<tr>
<td>Greece</td>
<td>7.5</td>
<td>6.8</td>
<td>-0.7</td>
</tr>
<tr>
<td>Austria</td>
<td>7.3</td>
<td>6.6</td>
<td>-0.7</td>
</tr>
<tr>
<td>Germany</td>
<td>7.2</td>
<td>6.5</td>
<td>-0.7</td>
</tr>
<tr>
<td>Netherlands</td>
<td>7.2</td>
<td>6.4</td>
<td>-0.8</td>
</tr>
<tr>
<td>Italy</td>
<td>7.2</td>
<td>6.4</td>
<td>-0.8</td>
</tr>
<tr>
<td>Belgium</td>
<td>7.1</td>
<td>6.3</td>
<td>-0.8</td>
</tr>
<tr>
<td>Norway</td>
<td>6.8</td>
<td>5.2</td>
<td>-1.6</td>
</tr>
<tr>
<td>France</td>
<td>6.8</td>
<td>5.1</td>
<td>-1.7</td>
</tr>
<tr>
<td>Switzerland</td>
<td>6.5</td>
<td>4.5</td>
<td>-2.0</td>
</tr>
</tbody>
</table>

Figures circled are significantly better than GB (significance of >95%)
GB ratings on value for money and expense across different holiday elements
Summary

- GB ratings on value for money & expense across different holiday elements

- The value for money offered by each GB holiday element / touch point is rated far more favourably than it is for expense, indicating that to some extent, people accept they are paying more but getting more.

- Despite lower ratings on expense and value for money the overall positively towards GB holidays remains very encouraging.
  - 9/10 favourably compared the experience of holidaying in GB with other holidays they had taken.

- Travel within towns/cities and attractions receive the best rating on value for money, of any GB holiday element / touch point, followed by attractions and travel to the country.

- Food and drink in GB is rated worst for both value for money and expense.
  - 1 in 4 rating it as being poor value for money (4 or less out of 10).

- Those travelling with children tend to rate GB lower on all aspects of value for money, especially for internal travel, entertainment and attractions; compared to those travelling without children.

- Visitors are more negative about how GB expense compares to other destinations than they are about the expense of any individual element of their holiday in GB.
  - 46% rated their holiday in GB as being expensive compared to other holidays abroad they have taken.
The value for money offered by all aspects of holidaying in Britain is rated far more favourably than the expense.

Travel within towns / cities and attractions receive the best ratings with food and drink rated worst for both value for money and expense.

<table>
<thead>
<tr>
<th>Expense</th>
<th>Value</th>
<th>Diff (value minus cost)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel within town/city- Expense</td>
<td>5.9</td>
<td></td>
</tr>
<tr>
<td>Travel outside town/city- Expense</td>
<td>5.6</td>
<td></td>
</tr>
<tr>
<td>Attractions - Expense</td>
<td>5.5</td>
<td></td>
</tr>
<tr>
<td>Travel to- Expense</td>
<td>5.3</td>
<td></td>
</tr>
<tr>
<td>Accommodation- Expense</td>
<td>5.3</td>
<td></td>
</tr>
<tr>
<td>Shopping -Expense</td>
<td>5.2</td>
<td></td>
</tr>
<tr>
<td>Entertainment - Expense</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>Food &amp; Drink- Expense</td>
<td>4.9</td>
<td></td>
</tr>
<tr>
<td>Travel within town/city -Value</td>
<td>6.7</td>
<td>+0.8</td>
</tr>
<tr>
<td>Attractions -Value</td>
<td>6.4</td>
<td>+0.9</td>
</tr>
<tr>
<td>Travel to -Value</td>
<td>6.3</td>
<td>+1.0</td>
</tr>
<tr>
<td>Accommodation -Value</td>
<td>6.3</td>
<td>+1.0</td>
</tr>
<tr>
<td>Entertainment -Value</td>
<td>6.3</td>
<td>+1.3</td>
</tr>
<tr>
<td>Travel outside town/city -Value</td>
<td>6.3</td>
<td>+0.7</td>
</tr>
<tr>
<td>Shopping -Value</td>
<td>6.0</td>
<td>+0.8</td>
</tr>
<tr>
<td>Food &amp; Drink -Value</td>
<td>5.8</td>
<td>+0.9</td>
</tr>
</tbody>
</table>

GB : Value for money & expense ratings of each aspect of a GB Holiday (Mean scores out of 10)

1 = Extremely expensive / poor value
10 = Extremely inexpensive/good value

Figures circled show significance of >95%

Base: Recent holiday visitors to GB (872)
The total appreciation of the GB holiday experience clearly adds up to more than ‘the sum of the parts’ as the overall holiday rating is significantly more positive than the rating of the individual elements.

-9/10 favourably compared the experience of holidaying in GB with other holidays they had taken.

**GB: Overall ratings of GB Holiday**

*‘Thinking about everything you did and saw, how good would you say the holiday experience offered by the GB was compared to other holidays you have taken elsewhere?’*

<table>
<thead>
<tr>
<th>Overall holiday experience</th>
<th>44</th>
<th>46</th>
<th>72</th>
<th>8.2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel within town/city - Value</td>
<td>21</td>
<td>31</td>
<td>31</td>
<td>10</td>
</tr>
<tr>
<td>Attractions - Value</td>
<td>17</td>
<td>29</td>
<td>33</td>
<td>13</td>
</tr>
<tr>
<td>Travel to - Value</td>
<td>14</td>
<td>30</td>
<td>37</td>
<td>14</td>
</tr>
<tr>
<td>Accommodation - Value</td>
<td>15</td>
<td>31</td>
<td>34</td>
<td>13</td>
</tr>
<tr>
<td>Entertainment - Value</td>
<td>14</td>
<td>26</td>
<td>34</td>
<td>13</td>
</tr>
<tr>
<td>Travel outside town/city - Value</td>
<td>13</td>
<td>25</td>
<td>37</td>
<td>10</td>
</tr>
<tr>
<td>Overall value rating</td>
<td>11</td>
<td>25</td>
<td>46</td>
<td>15</td>
</tr>
<tr>
<td>Shopping - Value</td>
<td>10</td>
<td>27</td>
<td>40</td>
<td>15</td>
</tr>
<tr>
<td>Travel within town/city - Expense</td>
<td>10</td>
<td>29</td>
<td>33</td>
<td>17</td>
</tr>
<tr>
<td>Food &amp; Drink - Value</td>
<td>8</td>
<td>26</td>
<td>39</td>
<td>20</td>
</tr>
<tr>
<td>Travel outside town/city - Expense</td>
<td>7</td>
<td>20</td>
<td>39</td>
<td>19</td>
</tr>
<tr>
<td>Attractions - Expense</td>
<td>10</td>
<td>19</td>
<td>34</td>
<td>24</td>
</tr>
<tr>
<td>Travel to - Expense</td>
<td>7</td>
<td>20</td>
<td>32</td>
<td>29</td>
</tr>
<tr>
<td>Accommodation - Expense</td>
<td>8</td>
<td>18</td>
<td>35</td>
<td>28</td>
</tr>
<tr>
<td>Shopping - Expense</td>
<td>5</td>
<td>19</td>
<td>36</td>
<td>29</td>
</tr>
<tr>
<td>Entertainment - Expense</td>
<td>6</td>
<td>12</td>
<td>35</td>
<td>27</td>
</tr>
<tr>
<td>Food &amp; Drink - Expense</td>
<td>4</td>
<td>16</td>
<td>36</td>
<td>33</td>
</tr>
<tr>
<td>Expense versus other holidays abroad</td>
<td>5</td>
<td>9</td>
<td>40</td>
<td>37</td>
</tr>
<tr>
<td>Expense versus other holidays in own country</td>
<td>4</td>
<td>9</td>
<td>35</td>
<td>36</td>
</tr>
</tbody>
</table>

Mean score (out of 10)

- **1-2** Extremely poor: 6.7, 6.4, 6.3, 6.3, 6.3, 6.3
- **3-4** Poor: 6.0, 6.0
- **5-6** Good: 5.9, 5.8, 5.6
- **7-8** Extremely good: 5.5, 5.3, 5.3, 5.2, 5.0, 4.9
- **9-10**

Figures circled show significance of >95%

Base: Recent holiday visitors to GB (872)

Q9 Thinking about everything you did and saw, how good would you say the vacation/holiday experience offered by (xxx), was compared to other holidays you have taken elsewhere?
Understandably, those with children rate most aspects as more expensive, especially internal travel, attractions and to a lesser degree accommodation. However this does not affect their comparison to other holidays abroad.

The strength of the experience means value ratings are more positive (albeit less so for travel outside towns/cities)

**GB: Expense ratings : By those visiting with children**

(Mean scores out of 10)

1 = Extremely poor
10 = Extremely good

**Travelling with children**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Expense</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel wild within town/city</td>
<td>7</td>
<td>17</td>
</tr>
<tr>
<td>Travel outside town/city</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>Attractions</td>
<td>7</td>
<td>16</td>
</tr>
<tr>
<td>Accommodation</td>
<td>7</td>
<td>15</td>
</tr>
<tr>
<td>Food &amp; Drink</td>
<td>6</td>
<td>14</td>
</tr>
<tr>
<td>Entertainment</td>
<td>7</td>
<td>17</td>
</tr>
<tr>
<td>Shopping</td>
<td>7</td>
<td>15</td>
</tr>
</tbody>
</table>

**95% significant difference**

Family vs. non family group:
- Attractions (Family weaker)
- Travel within towns/cities (Family weaker)
- Travel outside towns/cities (Family weaker)

Base: Recent holiday visitors to GB (872)
Despite higher value ratings than expense, those travelling with children tend to rate GB lower on all aspects of value for money compared to those who travel without children
- Especially internal travel, entertainment and attractions

GB: **Value for money** ratings : By those visiting with children

<table>
<thead>
<tr>
<th>Travelling with children</th>
<th>GB: <strong>Value for money</strong> ratings : By those visiting with children</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Value for money</strong></td>
<td>(Mean scores out of 10)</td>
</tr>
<tr>
<td></td>
<td>1 = Extremely poor value</td>
</tr>
<tr>
<td></td>
<td>10 = Extremely good value</td>
</tr>
</tbody>
</table>

**Base:** Recent holiday visitors to GB (872)

- **Families with children**
  - Attractions (Family weaker)
  - Travel within towns/cities (Family weaker)
  - Travel outside towns/cities (Family weaker)
  - Entertainment (Family weaker)

95% significant difference
Family vs. non family group:
- Attractions (Family weaker)
- Travel within towns/ cities (Family weaker)
- Travel outside towns/ cities (Family weaker)
- Entertainment (Family weaker)
Comparing GB holidays in a competitive context: Part 2. GB Versus Italy and France across different holiday elements
Summary - GB Versus Italy and France in detail

■ GB is consistently rated below Italy which is generally the strongest of the three destinations
  – Italy receives a more positive rating of overall holiday experience
  – Italy is seen as less expensive; especially when compared to domestic holidays
  – Italy is seen by more visitors to offer a high degree of value for money that GB
  – Most holidays elements in Italy are seen as being less expensive than for GB (other than shopping and travel to the country)
  – Italy’s most significant advantages over GB on value for money, are food & drink and accommodation

■ GB’s performance is generally more in-line with that of France
  – Although, expense versus both international and domestic holidays is significantly weaker for GB among short-haul visitors than it is for France
  – And France is generally weaker on expense of individual holiday elements among long-haul visitors
  – But there are few significant differences between GB and France in terms of value for money, either overall or for individual holiday elements / touch points
Summary - GB Versus Italy and France in detail

- GB does have some notable areas of relative strength;

- Expense of travelling to GB is a strength among short-haul visitors
  - The only expense rating where GB is ahead of Italy
  - And is significantly ahead of France

- GB is also strong on the value for money of travel within the country and shopping, with ratings as good as or even slightly ahead of France and Italy
  - And significantly ahead of France on value for money of shopping among long-haul visitors

- If visitors only visited rural / coastal areas and not any city, GB appears to receive stronger ratings than Italy or France on overall value for money (albeit on a relatively low base)
  - but fewer GB visitors go only to rural or costal areas than is the case for either Italy or France
Among long-haul visitors Italy is seen to offer a better holiday experience than either GB or France.

All three destinations are rated similarly among short-haul visitors with GB and Italy only slightly ahead of France.

Q9 Thinking about everything you did and saw, how good would you say the vacation/holiday experience offered by (xxx), was compared to other holidays you have taken elsewhere?

Base: Recent holiday visitors - GB (872), Italy (569), France (576); Long-haul GB (454), Italy (271), France (279); Short-haul GB (418), Italy (298), France (297)

Q9 Figures circled show Significance of >95%
GB is significantly behind both Italy and France among short-haul visitors.

The GB position is not as weak among long-haul visitors especially when compared to other holidays abroad.

Rating of overall holiday expense by visitors of each destination (compared to other holidays abroad and holidays in own country)

Expense Vs. other holiday abroad

Expense Vs. holiday in own country

Base: Recent holiday visitors : GB (872), Italy (569), France (576): Long-haul GB (454), Italy (271), France (279): Short-haul GB (418), Italy (298), France (297)

Q12 Compared to other holidays abroad you have taken or could take, how expensive would you say your holiday was overall? Please take into account everything you paid for, including travel, accommodation, entertainment, spending money etc.

Q13 Compared to vacations/holidays within your own country, how expensive would you say your holiday was overall?
GB is the only one of the destinations which has a negative balance in terms of expense compared to expectations (albeit only slightly)

Italy leads among short-haul visitors where 1 in 3 felt the expense of visiting was less than expected

<table>
<thead>
<tr>
<th>Destination</th>
<th>GB</th>
<th>Italy</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td>GB Long-haul</td>
<td>-4</td>
<td>+15</td>
<td>0</td>
</tr>
<tr>
<td>Short-haul</td>
<td>2</td>
<td>23</td>
<td>29</td>
</tr>
</tbody>
</table>

**Expectations of Expense: ‘Was your holiday more expensive than you expected, about the same or less expensive?’**

<table>
<thead>
<tr>
<th></th>
<th>GB</th>
<th>Italy</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Less expensive</td>
<td>29</td>
<td>17</td>
<td>22</td>
</tr>
<tr>
<td>% More expensive</td>
<td>25</td>
<td>24</td>
<td>22</td>
</tr>
</tbody>
</table>

**Balance**

<table>
<thead>
<tr>
<th></th>
<th>GB</th>
<th>Italy</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance</td>
<td>28</td>
<td>32</td>
<td>27</td>
</tr>
</tbody>
</table>

**Rating out of 10**

- **Much less expensive (9-10)**
- **Less expensive (7-8)**
- **More expensive (3-4)**
- **Much more expensive (1-2)**

Figures circled show significance of >95%

Base: Recent holiday visitors: GB (872), Italy (569), France (576): Long-haul GB (454), Italy (271), France (279): Short-haul GB (418), Italy (298), France (297)

Q11 And thinking about the total cost of your vacation/holiday including everything e.g. travel, visas, accommodation, spending money etc., Was your vacation/holiday more expensive than you expected, about the same or less expensive than you expected?
GB has a worse value rating as a holiday destination than France and in particular Italy - this is due to a higher proportion of strongly positive ratings for Italy and France, rather than greater negativity for GB

Overall Value for money rating of holiday destinations:

‘Thinking about the holiday experience as a whole, how would you rate your holiday in terms of value for money? By value for money we mean how fair you felt the price to be, for the quality or standard of goods/service or for how good or unique the experience was’

<table>
<thead>
<tr>
<th>Destination</th>
<th>Long-haul</th>
<th>Short-haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>6.0</td>
<td>6.0</td>
</tr>
<tr>
<td>Italy</td>
<td>6.4</td>
<td>6.5</td>
</tr>
<tr>
<td>France</td>
<td>6.2</td>
<td>6.1</td>
</tr>
</tbody>
</table>

Mean score out of 10

<table>
<thead>
<tr>
<th>UK</th>
<th>13</th>
<th>17%</th>
<th>46%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>11</td>
<td>15%</td>
<td>38%</td>
</tr>
<tr>
<td>France</td>
<td>15</td>
<td>20%</td>
<td>38%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UK</th>
<th>17</th>
<th>19%</th>
<th>22%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>39</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>France</td>
<td>36</td>
<td>46%</td>
<td>46%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UK</th>
<th>27</th>
<th>38%</th>
<th>12%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>25</td>
<td>34%</td>
<td>14%</td>
</tr>
<tr>
<td>France</td>
<td>27</td>
<td>46%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Figures circled show significance of >95%

Base: Recent holiday visitors: GB (872), Italy (569), France (576): Long-haul GB (454), Italy (271), France (279): Short-haul GB (418), Italy (298), France (297)

Q14: And thinking about the vacation/holiday experience as a whole, how would you rate your vacation/holiday in (XXX) in terms of value for money? By value for money we mean how fair you felt the price to be, for the quality or standard of goods/service or for how good or unique the experience was.
If visitors only visited rural / coastal areas and not any city, GB is stronger than Italy or France on overall value for money; but Italy leads when cities were visited as well.

Although GB is slightly behind there are no significant differences in the rating of expense vs. other holidays abroad

**GB Vs. Italy and France: Expense vs. other holidays abroad and overall value by those who visited rural / coastal areas**

<table>
<thead>
<tr>
<th>Destinations</th>
<th>GB</th>
<th>Italy</th>
<th>Fra</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expense</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vs. other holidays abroad</td>
<td>4.8</td>
<td>5.2</td>
<td>5.0</td>
</tr>
<tr>
<td>Mean</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Rating out of 10</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extremely expensive / poor value for money</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any Rural or Coastal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rural areas / the countryside</td>
<td>6.2</td>
<td>6.6</td>
<td>6.2</td>
</tr>
<tr>
<td>Mean</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coastal areas / seaside</td>
<td>6.3</td>
<td>6.8</td>
<td>6.3</td>
</tr>
<tr>
<td>Overall Value for money</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: Recent holiday visitors to GB (872), Italy (569) and France (576)

Q12 Compared to other vacations/holidays abroad you have taken or could take, how expensive would you say your holiday was overall? Please take into account everything you paid for, including travel, accommodation, entertainment, spending money etc.

Q14 And thinking about the vacation/holiday experience as a whole, how would you rate your vacation/holiday in (INSERT SELECTED HOLIDAY COUNTRY) it in terms of value for money? By value for money we mean how fair you felt the price to be, for the quality or standard of goods /service or for how good or unique the experience was.

Figures circled show Significance of >95%
Among short-haul visitors GB is rated more favourably for expense on travel to the country than France or Italy. GB is weaker than Italy on all other expense measures, but in terms of value for money Italy’s only significant advantages are accommodation and food & drink.

**Expense & value for money ratings for each holiday aspect by destination: GB Vs. Italy and France by Short-haul**

95% significant difference
GB vs. Italy:
- All others than travel to (Italy ahead)
- Travel to (GB ahead)

95% significant difference
GB vs. France:
- Accommodation (Italy ahead)
- Food & drink (Italy ahead)

Q1: How important were the following in your decision to take a vacation/holiday in (the GB/ Italy /France)?

Base: Recent holiday visitors Short-haul GB (418), Italy (298), France (297)
Among long-haul visitors Italy again has a significant advantage on the value for money of its food & drink, but has less of an advantage than among short-haul on accommodation and all expense ratings.

GB has an advantage over France on expense of shopping and accommodation but this disappears when value for money is taken into account.

**Expense & value for money ratings for each holiday aspect destination: GB Vs. Italy and France by Long-haul**

**Expense**

- **Travel to**
  - UK: 7
  - Italy: 6
  - France: 5
- **Accommodation**
  - UK: 6
  - Italy: 5
  - France: 4
- **Food & Drink**
  - UK: 5
  - Italy: 4
  - France: 3
- **Attractions**
  - UK: 4
  - Italy: 3
  - France: 2
- **Travel within town/city**
  - UK: 4
  - Italy: 3
  - France: 2
- **Travel outside town/city**
  - UK: 4
  - Italy: 3
  - France: 2

**Value for money**

- **Travel to**
  - UK: 8
  - Italy: 7
  - France: 6
- **Accommodation**
  - UK: 7
  - Italy: 6
  - France: 5
- **Food & drink**
  - UK: 6
  - Italy: 5
  - France: 4
- **Attractions**
  - UK: 5
  - Italy: 4
  - France: 3
- **Travel within town/city**
  - UK: 4
  - Italy: 3
  - France: 2
- **Travel outside town/city**
  - UK: 4
  - Italy: 3
  - France: 2

**95% significant difference**

- GB vs. Italy: None
- GB vs. France:
  - Accommodation (GB ahead)
  - Shopping (GB ahead)

- GB vs. Italy: None
- GB vs. France:
  - Food & drink (Italy ahead)
  - None

Base Recent holiday visitors: Long-haul GB (454), Italy (271), France (279)

Q1: How important were the following in your decision to take a vacation/holiday in (the GB/Italy/France)?
The contribution of visiting capital cities: London, Rome and Paris
Summary - The contribution of visiting capital cities: London, Rome and Paris

- Those who visited London are more likely to rate their holiday as being expensive (compared to those who did not visit London), especially for accommodation but also entertainment and shopping
  - However, the difference is less apparent on value for money
  - And London visitors rate travel within GB as better value than those who did not visit London
  - But overall value of the holiday and accommodation value, are rated lower if London was visited

- The negative impact on a destination’s ratings from visiting a capital city is also evident for Italy and France

- However, it is likely to have a greater impact for GB than for Italy or France as short-haul visitors to GB are far more likely to have visited London than short-haul visitors to Italy or France are to have visited Rome or Paris respectively

- Another area of comparative weakness for GB is that value for money ratings for food & drink among those who did not visit capital cities are significantly weaker than for Italy and France
  - and to a slightly lesser degree, accommodation

- Food & drink (both value and expense) is also a weakness for London when compared to Rome; but not compared to Paris
GB is thought more expensive among those who visited London most notably for accommodation but also entertainment and shopping.

The difference is less apparent on value for money and London visitors feel travel within GB is better value, especially travel within towns/cities.

GB expense & value for money ratings for each holiday aspect: By those who did / did not visit London

<table>
<thead>
<tr>
<th>Expense Vs hols own country</th>
<th>(Mean scores out of 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel to</td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td></td>
</tr>
<tr>
<td>Food &amp; Drink</td>
<td></td>
</tr>
<tr>
<td>Entertainment</td>
<td></td>
</tr>
<tr>
<td>Travel within towns/cities</td>
<td></td>
</tr>
<tr>
<td>Travel outside towns/cities</td>
<td></td>
</tr>
</tbody>
</table>

Value for money

<table>
<thead>
<tr>
<th>Overall value rating</th>
<th>Attraction -value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel to -value</td>
<td></td>
</tr>
<tr>
<td>Accommodation -value</td>
<td></td>
</tr>
<tr>
<td>Food &amp; Drink -value</td>
<td></td>
</tr>
<tr>
<td>Travel within towns/ cities -value</td>
<td></td>
</tr>
<tr>
<td>Travel outside cities / towns -value</td>
<td></td>
</tr>
</tbody>
</table>

95% significant difference
Visit London vs. not visit London:
- Accommodation (not visited Lond.)
- Expense vs. own country (not visited Lond.)

95% significant difference
Visit London vs. not visit London:
- Travel within cities (visited Lond.)

Base: Recent holiday visitors to GB (872); Visited London (690); Not visited London (182)
For short-haul visitors, GB visits are dominated by its capital city far more than either France or Italy with a higher proportion of visitors to the GB visiting the capital.
- All capitals are understandably more dominant for long-haul.

**Dominance of capital cities: Proportion of visitors having visited the capital city**

- For all three destinations, those going to places other than the capital had more previous experience of the country they are visiting.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Total</th>
<th>Long-haul</th>
<th>Short-haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>80</td>
<td>85</td>
<td>75</td>
</tr>
<tr>
<td>Rome</td>
<td>56</td>
<td>82</td>
<td>31</td>
</tr>
<tr>
<td>Paris</td>
<td>68</td>
<td>90</td>
<td>46</td>
</tr>
</tbody>
</table>

*Figures circled show significance of >95%*
Rome is reported as less expensive than London and Paris especially on food & drink, entertainment and expense vs. own country

London leads Paris when comparing expense of international travel to the city, accommodation and most notably on shopping

Expense ratings of each destination by visitors to capital cities: **London Vs. Rome and Paris** (Mean scores out of 10)

<table>
<thead>
<tr>
<th>Destination</th>
<th>London</th>
<th>Rome</th>
<th>Paris</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; Drink</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel to</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entertainment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel outside towns/cities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel within towns/cities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attractions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expense Vs hols own country</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Expense**

1 = Extremely expensive / poor value
10 = Extremely inexpensive/good value

95% significant difference

London vs. Rome:
- Food and drink (Rome)
- Entertainment (Rome)
- Expense vs. own country (Rome)

London vs. Paris:
- Travel to (London)
- Accommodation (London)
- Shopping (London)

Base: Recent holiday visitors; visited capital city: London (690), Rome (305), Paris (373)
Rome also leads on overall value rating and especially on food & drink - but also on accommodation and attractions and international travel to the city. Paris generally catches-up with London on value but London leads both on shopping.
The position on value for money shows GB ranked lower on food & drink and accommodation when London has not been visited.

- However, Italy is less dominant when Rome has not been visited but it retains its advantage over GB on food & drink and accommodation.

Value for money ratings of each destination: By those who did/did not visit capital cities

(Mean scores out of 10)

1 = Extremely poor value
10 = Extremely good value

95% significant difference
GB vs. Italy:
- Food & drink (Italy)
- Overall value for money (Italy)

GB vs. France:
- Shopping

95% significant difference
GB vs. Italy:
- Accommodation (Italy)
- Food & drink (Italy)

GB vs. France:
- Food & drink (France)

Base: Recent holiday visitors: Not visited capital city: GB (184), Italy (264), France (203); Visited capital city: London (690), Rome (305), Paris (373)
How could Britain’s standing as a holiday destination which provides good value for money be improved?
Two approaches have been used to investigate which factors influence positive ratings of value for money and expense

1. Direct Approach

Visitors asked why they gave a high or low rating on value for money

- Responses grouped on common topics and themes
- Shows the most overt / top-of-mind factors they felt
  - Represented good value for money
    - What factors or experiences made you feel that the holiday was good value for money?
  - And which represented poor value for money
    - What factors or experiences made you feel that the holiday was not good value for money?

- Asked for GB, Italy and France and compared across all three

2. Statistical approach

Key driver analysis

- Digs deeper to identify which factors or ratings predict
  - A high value for money score for the holiday
  - Or a weak score on expense vs. other holidays abroad

- Measures the relative influence of each factor to identify which areas would provide the best return (improvement in overall value/expense rating) if they could be improved

- We also ran driver analysis by GB visitor subgroups
- And compared GB, Italy and France at a ‘total’ visitor level on drivers of value
  - NB: bases too small to look at drivers by subgroups of Italy and France
What factors or experiences made you feel that the holiday was good value for money?

‘London with its sights & history & shopping experience & cultural places. Historical towns, buildings & beautiful countryside.’
Male, 65+yrs, Australia

‘Historical sites and range of cultural experiences within a very small area. Pubs and variety of culinary experiences.’
Female, 65+yrs, Canada

‘Culture, English for my children, amenities and shopping.’
Female, 45-54yrs, Germany

‘Airfare sale made flight costs lower. Booking hotels in advance gave me great cost/value. Weather was cooperative which is always a Plus.’
Male, 25-34yrs, Canada

‘Quality of accommodations, friendliness of the people we met & spoke with, quality of the food and quality & price of the Guinness!!!’
Male, 35-44yrs, USA

‘There are ways to get around some of the tourist expenses …knowing more about London than before, we didn’t end up in the tourist traps.’
Female, 55-64yrs, USA

‘Ease of travel, quality of accommodation, number of sightseeing opportunities and historical places to visit. Good food.’
Female, 55-64yrs, Australia

‘So much to see and do. The basic history of the places we visited. People were always friendly and helpful. Fantastic public transport.’
Male, 55-64yrs, USA

‘Easy travelling about. Food prices were fair and accommodation good. Entry fees sometimes a bit expensive but museums were wonderful value.’
Female, 65+yrs, Canada

‘Good food, lots of things to do, good night life, good public transport.’
Male, 18-24yrs, Australia
What factors or experiences made you feel that the holiday was not good value for money?

‘It is just an expensive country to be in with our conversion rate. Air flights are very expensive to get there.’
Male, 25-34yrs, Australia

‘Expensive shopping. Food not very good’
Male, 25-34yrs, Canada

‘Transportation costs. Eating out costs. Costs of leisure activities’
Male, 35-44yrs, Germany

‘Unfavourable exchange rate - Food costs. Taxicabs very expensive’
Female, 25-34yrs, Canada

‘Cost of Eating out, admission to shows, hotels expensive, Airfare, Cost of Shopping’
Female, 35-44yrs, USA

‘Every thing is so very expensive. Service is not of the same quality as U.S. Transport is unreliable’
Female, 45-54yrs, USA

‘Air port taxes extremely high. Public Transport over priced. Car rental over priced. Mediocre hotel accommodation. Restaurants poor value for money’
Male, 55-64yrs, Australia

‘Price of gasoline, cost of parking, rental car fees, entrance fees to attractions, stately homes etc. ’
Male, 55-64yrs, USA

‘Dining out, extremely expensive activities, admissions very expensive skipped several as they were just totally out of line with the pricing’
Female, 45-54yrs, Canada

‘It’s just so expensive overall compared to other destinations’
Male, 45-54yrs, Australia
From analysis of the direct questioning and statistical analysis of what drives overall value and expense ratings

- As well as GB’s ratings and comparative strengths and weaknesses versus Italy and France

Several areas in particular stood out as being the most likely to have a significant impact on GB standing as a holiday destination which provides good value for money
1. **CHALLENGE:**

Highlight ways in which the cost of visiting Britain could be lower

**WHY IMPORTANT:**

- Being expensive is the main reason given spontaneously as to why a GB holiday is rated poorly on value for money; not because of poor experience
  - 60% of those who rated GB as poor value for money said this was due to expense

- Driver analysis identifies expense versus other holidays abroad as the single greatest influencer of overall GB value for money ratings

- And identifies expense of accommodation and expense of food & drink as the biggest drivers of rating a GB holiday as being more expensive than other holidays abroad

- Results clearly show that expense is a comparative weakness as Britain is rated as being more expensive for a holiday than almost all major European destinations

- **Accommodation and food & drink are the areas most in need of being seen as less expensive**
CHALLENGE: Improve ratings of GB food & drink

WHY IMPORTANT:

- When done well food & drink has a strong positive influence on overall ratings of GB value for money but when poor it has a major negative influence
  - One of the main reasons visitors spontaneously give as to why they rated their GB holiday as being good value for money
  - But also one of the main reasons given as to why their holiday was poor value for money

- Food & drink is a significant driver of holiday value for money for all destinations tested
  - Driver analysis indicates it as a key driver for GB, Italy and France
  - Also the most common reason spontaneously given as to why holidays in Italy and France were good value for money
  - Driver analysis shows it to be a universal driver among all GB holiday groups
    - Especially families and those staying four nights or less

- Currently a weakness of GB holidays
  - The lowest rated holiday element for GB, both in terms of expense and value for money
  - And a competitive weakness compared to ratings of food & drink in Italy in particular but also France (especially when London is not visited)
Key influences on value ratings of GB food & drink
Key influences on value ratings of GB food & drink

- Those who mainly use bars/pubs gave the highest value ratings for food & drink in GB
  - Unsurprising given the rise of bistro pubs in British popular culture

- Whereas main users of small cafes and restaurants had the worst value and expense ratings

- GB cafes/ restaurants struggle to compete with those in Italy and France on value for money

- GB pubs/bars are competitive versus Italy and France on expense and compare more favourably on value than GB cafes/ restaurants do

- Despite contributing to the least positive ratings on expense and value restaurants and small cafes and diners are the most commonly used places to buy food & drink (all over 20% as main source).
  - Currently only 16% said bars/pubs were their main source of holiday food & drink
  - Although far more than for Italy or France
Visitors whose main source of food & drink whilst on holiday were supermarkets, fast food outlets or bars/pubs rate GB food and drink most positively on expense - Restaurants and coffee shops/tea rooms elicited the least positive expense rating

### GB Food & Drink: Expense rating by main source of food & drink

#### Food & drink - Expense

<table>
<thead>
<tr>
<th>Most often used source of food &amp; drink</th>
<th>Supermarkets / convenience stores</th>
<th>Fast food outlets e.g. McDonalds</th>
<th>Bars / pubs</th>
<th>Hotel / guest house</th>
<th>Small cafes / diners</th>
<th>Restaurants</th>
<th>Coffee shops / Tea rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mean</td>
<td>5.2</td>
<td>5.1</td>
<td>5.1</td>
<td>4.9</td>
<td>4.8</td>
<td>4.6</td>
<td>4.5</td>
</tr>
<tr>
<td>Rating out of 10</td>
<td>7</td>
<td>7</td>
<td>14</td>
<td>11</td>
<td>5</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>(170)</td>
<td>(134)</td>
<td>(68)</td>
<td>(84)</td>
<td>(165)</td>
<td>(184)</td>
<td>(45)</td>
<td>(45) *</td>
</tr>
</tbody>
</table>

* CAUTION LOW BASE

Base: Recent holiday visitors to GB (872)

Q23 How expensive was it to buy food and drink?
Those who mainly used bars/pubs or their hotel/guest house rated food & drink higher on value, followed by supermarket users.
- Those mainly using restaurants or coffee shops/tea rooms again gave the lowest ratings of food & drink on their holiday.

GB Food & Drink: Value rating by main source of food & drink

### Food & drink - Value for money

<table>
<thead>
<tr>
<th>Rating out of 10</th>
<th>Extremely poor value for money</th>
<th>Extremely good value for money</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1-2</td>
<td>3-4</td>
</tr>
<tr>
<td></td>
<td>5-6</td>
<td>7-8</td>
</tr>
<tr>
<td></td>
<td>9-10</td>
<td>9-10</td>
</tr>
</tbody>
</table>

Mean:
- **6.0**
- **5.9**
- **5.9**
- **5.8**
- **5.7**
- **5.6**
- **5.5**

**Bars / pubs**: Mean 6.0
- 5 [16] (170)
- 7 [15] (134)
- 2 [17] (68)
- 8 [14] (84)
- 4 [25] (165)
- 2 [21] (184)
- 12 [9] (45)

**Our hotel / guest house**: Mean 5.9
- 44 [15] (170)
- 39 [17] (134)
- 48 [17] (68)
- 41 [14] (84)
- 33 [25] (165)
- 28 [21] (184)

**Supermarkets and convenience stores**: Mean 5.9
- 20 [6] (170)
- 22 [6] (134)
- 28 [6] (68)
- 28 [6] (84)
- 33 [6] (165)
- 33 [6] (184)
- 9 [6] (45)

**Fast food outlets e.g. McDonalds**: Mean 5.8
- 14 [15] (170)
- 15 [15] (134)
- 17 [6] (68)
- 14 [6] (84)
- 4 [25] (165)
- 9 [21] (184)
- 8 [9] (45)

**Small cafes and diners**: Mean 5.7
- 28 [4] (170)
- 28 [4] (134)
- 28 [4] (68)
- 28 [4] (84)
- 24 [4] (165)
- 8 [4] (184)
- 3 [9] (45)

**Restaurants**: Mean 5.6
- 5 [9] (170)
- 16 [9] (134)
- 22 [9] (68)
- 41 [9] (84)
- 21 [9] (165)
- 37 [9] (184)
- 16 [9] (45)

**Coffee shops or Tea rooms**: Mean 5.5
- 16 [5] (170)
- 8 [5] (134)
- 25 [5] (68)
- 33 [5] (84)
- 28 [5] (165)
- 12 [5] (184)
- 9 [5] (45)

*CAUTION LOW BASE*

**Most often used source of food & drink**
- Bars / pubs (170)
- Our hotel / guest house (134)
- Supermarkets and convenience stores (68)
- Fast food outlets e.g. McDonalds (84)
- Small cafes and diners (165)
- Restaurants (184)
- Coffee shops or Tea rooms (45)

Base: Recent holiday visitors to GB (872)

Q24 Taking everything into account including overall experience, quality, size of portions, level of service, atmosphere of the place you ate or drank etc.. How would you rate the food & drink in terms of value for money?
GB cafes and restaurants elicit weaker value ratings than those in either Italy or France

Ratings among those who use GB pubs/bars compare more favourably especially on expense but also to restaurants in France in terms of value for money

**Food & Drink: Expense and value for money rating by main type of accommodation stayed in**

<table>
<thead>
<tr>
<th>Food &amp; Drink - Expense</th>
<th>GB</th>
<th>Italy</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td>expense</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GB</td>
<td>5.1</td>
<td>4.8</td>
<td>4.6</td>
</tr>
<tr>
<td>Italy</td>
<td></td>
<td>5.2</td>
<td>5.1</td>
</tr>
<tr>
<td>France</td>
<td></td>
<td>4.5</td>
<td>4.8</td>
</tr>
<tr>
<td>Mean</td>
<td></td>
<td>5.5</td>
<td>5.2</td>
</tr>
<tr>
<td>Base too small</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bars / pubs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GB</td>
<td>7</td>
<td>5</td>
<td>12</td>
</tr>
<tr>
<td>Italy</td>
<td>32</td>
<td>40</td>
<td>38</td>
</tr>
<tr>
<td>France</td>
<td>29</td>
<td>39</td>
<td>33</td>
</tr>
<tr>
<td>Mean</td>
<td>4</td>
<td>13</td>
<td>11</td>
</tr>
<tr>
<td>Small cafes and diners</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GB</td>
<td>24</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>Italy</td>
<td>13</td>
<td>39</td>
<td>33</td>
</tr>
<tr>
<td>France</td>
<td>19</td>
<td>20</td>
<td>21</td>
</tr>
<tr>
<td>Mean</td>
<td>4</td>
<td>11</td>
<td>19</td>
</tr>
<tr>
<td>Restaurants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GB</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Italy</td>
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<td></td>
<td></td>
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<tr>
<td>France</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Food & Drink - Value for money**

<table>
<thead>
<tr>
<th>Food &amp; Drink - Value for money</th>
<th>GB</th>
<th>Italy</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td>value for money</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GB</td>
<td>6.0</td>
<td>5.7</td>
<td>5.6</td>
</tr>
<tr>
<td>Italy</td>
<td></td>
<td>6.5</td>
<td>6.4</td>
</tr>
<tr>
<td>France</td>
<td></td>
<td>6.3</td>
<td>6.1</td>
</tr>
<tr>
<td>Mean</td>
<td></td>
<td>6.3</td>
<td>6.2</td>
</tr>
<tr>
<td>Base too small</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bars / pubs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GB</td>
<td>16</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Italy</td>
<td>44</td>
<td>25</td>
<td>37</td>
</tr>
<tr>
<td>France</td>
<td>20</td>
<td>33</td>
<td>37</td>
</tr>
<tr>
<td>Mean</td>
<td>14</td>
<td>12</td>
<td>22</td>
</tr>
<tr>
<td>Small cafes and diners</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GB</td>
<td>25</td>
<td>12</td>
<td>24</td>
</tr>
<tr>
<td>Italy</td>
<td>33</td>
<td>28</td>
<td>25</td>
</tr>
<tr>
<td>France</td>
<td>33</td>
<td>19</td>
<td>33</td>
</tr>
<tr>
<td>Mean</td>
<td>14</td>
<td>11</td>
<td>21</td>
</tr>
<tr>
<td>Restaurants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GB</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Italy</td>
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<td></td>
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<tr>
<td>France</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: Recent holiday visitors to GB, Italy, France
Q23 How expensive was it to buy food and drink?
Q24 Taking everything into account including overall experience, quality, size of portions, level of service, atmosphere of the place you ate or drank etc. How would you rate the food & drink in terms of value for money?
CHALLENGE: Improve ratings of GB accommodation

WHY IMPORTANT:

- Accommodation is the most common reason visitors spontaneously give as to why they rated their GB holiday as being good value for money
  - mentioned by 44% of those who rated their GB holiday as good value

- Again (although less so than food) it is also one of the main reasons given as to why their holiday was poor value for money
  - mentioned by 42% of those who rated their GB holiday as poor value

- Accommodation is a significant driver of GB holidays being seen to be good value for money
  - True for virtually all visitors types

- And is also a key driver of holiday value for money, for both Italy and France

- Accommodation as the single biggest driver of a GB holidays being rated as more expensive than other holidays abroad

- And is a comparative weakness compared to Italy, especially among short-haul visitors
Key influences on value ratings of GB accommodation
Key influences on value ratings of GB accommodation

- GB mid-range hotels are the most commonly used form of accommodation but elicit the weakest value ratings; especially weak compared to Italy.

- Promoting the use of stronger types of accommodation is more realistic than trying to improve the performance of mid range hotels but all ways to improve accommodation should be explored by VisitBritain.

- Luxury hotels elicit the highest value ratings for accommodation among GB visitors and also compare favourably to those in Italy and France.

- However, not all GB visitors can afford these due to the expense but private guest houses/B&Bs are seen as more affordable and elicit the next strongest value ratings for GB accommodation.
Although self catering and budget hotels are seen to be the least expensive they do not score highly on value for money (budget hotels are especially poor, with mid range also weak)
The most expensive accommodation (luxury hotels) lead on value followed by private guest houses

**GB Accommodation: Expense and value for money rating by main type of accommodation stayed in**

### Accommodation-Expense

<table>
<thead>
<tr>
<th>Main type of accommodation stayed in</th>
<th>Expense Rating Mean</th>
<th>Expense Rating Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-catering (e.g. cottage, holiday village or hostel) (52)</td>
<td>5.8</td>
<td>4</td>
</tr>
<tr>
<td>Budget hotel (81)</td>
<td>5.7</td>
<td>4</td>
</tr>
<tr>
<td>Private guesthouse / bed &amp; breakfast (115)</td>
<td>5.6</td>
<td>1</td>
</tr>
<tr>
<td>Mid-range hotel (e.g. 1-3 star rating) (378)</td>
<td>5.0</td>
<td>8</td>
</tr>
<tr>
<td>Luxury hotel (e.g. 4+ star rating) (158)</td>
<td>4.6</td>
<td>18</td>
</tr>
</tbody>
</table>

### Accommodation-Value for money

<table>
<thead>
<tr>
<th>Main type of accommodation stayed in</th>
<th>Value for Money Rating Mean</th>
<th>Value for Money Rating Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-catering (e.g. cottage, holiday village or hostel) (52)</td>
<td>6.3</td>
<td>1</td>
</tr>
<tr>
<td>Budget hotel (81)</td>
<td>5.4</td>
<td>7</td>
</tr>
<tr>
<td>Private guesthouse / bed &amp; breakfast (115)</td>
<td>6.6</td>
<td>9</td>
</tr>
<tr>
<td>Mid-range hotel (e.g. 1-3 star rating) (378)</td>
<td>6.0</td>
<td>7</td>
</tr>
<tr>
<td>Luxury hotel (e.g. 4+ star rating) (158)</td>
<td>6.9</td>
<td>10</td>
</tr>
</tbody>
</table>

- Budget hotels are the only type to be rated weaker for value than expense

Base: Recent holiday visitors to GB (872)
Q20 How expensive was your paid accommodation? Q21 Taking everything into account including overall quality, location and level of service etc. How would you rate the accommodation in terms of value for money?
4.

**CHALLENGE:** Improve ratings of GB shopping

**WHY IMPORTANT:**

- Driver analysis identifies shopping as the strongest driver of GB holiday value for money
  - A universal driver for all visitor groups but especially strong for 18-34yr olds those travelling without children and long-haul visitors

- GB ratings on shopping show plenty of room for improvement and are weaker than most other GB other holiday elements
  - Only food & drink is rated lower on value for money

- However, GB shopping compares favourably to competitors on value for money, being similar to Italy but ahead of France

- As such shopping is a comparative strength for GB holidays
  - Especially compared to France among long-haul visitors and those who visited the capital city (London vs. Paris)
Key influences on value ratings of GB shopping
Key influences on value ratings of GB shopping

- Those who go shopping for non-food items rate the expense and value of shopping in GB more favourably suggesting that the reality of shopping in GB is more positive than the perception.

- Clothing / footwear are the most commonly shopped for items, even more so than holiday souvenirs and is likely to be a key area of strength.

- The biggest positive shopping influence among long-haul visitors is use of the tax refund scheme.
  - Those who use it not only rate GB shopping more favourably but also the overall value of their GB holiday.

- But this scheme needs to be promoted as 1 in 3 are not aware of it and even fewer (less than 1 in 4) use it, suggesting they are not fully aware of the benefits or find it difficult to obtain.
Those who went shopping for non-food items rated the expense and value of shopping more favourably -suggesting that the reality of shopping in GB is more positive than the perception.

Expense and Value for money ratings among those who did / did not shop for non-food items whilst on GB holiday

**Shopping - Expense**

<table>
<thead>
<tr>
<th></th>
<th>Not shopped</th>
<th>Shopped</th>
</tr>
</thead>
<tbody>
<tr>
<td>8%</td>
<td>6</td>
<td>21</td>
</tr>
</tbody>
</table>

**Shopping - Value**

<table>
<thead>
<tr>
<th></th>
<th>Not shopped</th>
<th>Shopped</th>
</tr>
</thead>
<tbody>
<tr>
<td>15%</td>
<td>11</td>
<td>29</td>
</tr>
</tbody>
</table>

Figures circled show significance of >95%
Another element which positively augments ratings is use of the tax refund scheme available for long-haul visitors.

The importance of tax refund schemes of expense and value for money ratings among Long-haul visitors

**Shopping - Expense**

- Total Long-haul shoppers: 24% (18) of 75%
  - Used tax refund scheme: 29% (17) of 24%
  - Aware but did not use: 24% (12) of 12%
  - Not use or aware: 21% (17) of 10%

**Shopping - Value**

- Total Long-haul shoppers: 41% (29) of 90%
  - Used tax refund scheme: 47% (34) of 38%
  - Aware but did not use: 42% (32) of 24%
  - Not use or aware: 38% (24) of 24%

**Value for money of overall holiday**

- Total Long-haul shoppers: 38% (26) of 24%
  - Used tax refund scheme: 48% (30) of 47%
  - Aware but did not use: 39% (27) of 42%
  - Not use or aware: 34% (24) of 38%

Figures circled show significance of >95%

Base: Recent holiday long-haul visitors to GB who shopped for non-food items whilst on holiday (406)
However, awareness of the tax refund scheme could be improved as less than 2/3 are aware of its existence and less than ¼ using - Awareness does improve if GB has been visited more often but not usage

### Awareness and use of tax refund scheme

<table>
<thead>
<tr>
<th></th>
<th>First time</th>
<th>1-2 times before</th>
<th>3-5 times before</th>
<th>6 or more times</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Any aware</strong></td>
<td>55%</td>
<td>45%</td>
<td>70%</td>
<td>76%</td>
</tr>
<tr>
<td>Yes, I did use tax refund scheme</td>
<td>27%</td>
<td>19%</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td>I was aware of tax refund scheme but did not use it</td>
<td>28%</td>
<td>26%</td>
<td>50%</td>
<td>51%</td>
</tr>
<tr>
<td>I was not aware of tax refund scheme</td>
<td>43%</td>
<td>51%</td>
<td>29%</td>
<td>21%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Figures circled show significance of >95%
CHALLENGE: Improve ratings of travel within GB

WHY IMPORTANT:

- Travel within GB, especially when in towns/cities, is a significant driver of overall value for money for a GB holiday
  - Especially for short-haul, those without children and older visitors

- But it can also be a significant negative driver of expense versus other holidays abroad

- Travel within GB is however, a relative strength for Britain
  - Receives the most favourable expense and value for money ratings of any GB holiday element
  - GB value ratings for travel within the country are as good as or slightly better than France or Italy

- But there is still room for some improvement
  - Ratings on expense and value for money are significantly lower among a key holiday audience, that of families
  - And expense ratings on travel within GB are slightly behind Italy
Key influences on value ratings of travel within GB
Key influences on value ratings of travel within GB

- Those who use public transport have significantly better ratings of travel within GB towns/cities than those who drove themselves or used taxis/cabs.

- Buying a season or multiple ticket significantly improves perceptions of the expense, and especially the value, of travelling within GB towns and cities.

- However, there is plenty of scope to improve usage of these discount tickets as 4 in 10 of visitors who used public transport do not use them:
  - Especially for over-ground trains and buses as ½ of those travelling in this manner did not use them.
  - And although more commonly used in London (especially by Tube travellers) 1 in 3 London visitors who used public transport did not use them.
Using public transport (rather than driving and especially taxis) elicits better ratings of the expense of travelling within GB towns/cities and, in particular, the value for money it represents.

Unsurprisingly, those who mainly walked, rate that form most favourably.

Factors influencing value for money of travel within towns/cities: main form of transport used

- Using taxis has a significant negative impact on ratings

<table>
<thead>
<tr>
<th>Expense</th>
<th>Value for money</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Walked</strong></td>
<td>6.4 (5)</td>
</tr>
<tr>
<td><strong>Own or friends car / motorbike</strong></td>
<td>5.7 (7)</td>
</tr>
<tr>
<td><strong>Underground train</strong></td>
<td>6.2 (6)</td>
</tr>
<tr>
<td><strong>Overground train</strong></td>
<td>5.9 (8)</td>
</tr>
<tr>
<td><strong>Bus or tram</strong></td>
<td>6.2 (6)</td>
</tr>
<tr>
<td><strong>Sightseeing bus tours</strong></td>
<td>6.5 (6)</td>
</tr>
<tr>
<td><strong>Taxi / cab</strong></td>
<td>4.9 (10)</td>
</tr>
<tr>
<td><strong>Hired vehicle (self-driven)</strong></td>
<td>5.2 (9)</td>
</tr>
</tbody>
</table>

Mean score (out of 10)

- Extremely poor
- Poor
- Good
- Extremely good

Figures circled show Significance of >95%

* CAUTION LOW BASE

Base: All visited GB for a holiday recently and travelled within towns / cities (847)

Q29 / Q30 / Q31 ‘When you were using trains or buses, trams, river buses/boats, or hired bikes did you purchase tickets or pay just for the journey you were making or did you purchase multiple tickets, short period season ticket or other means of saving money for multiple journeys?’
Buying a season or multiple ticket significantly improves perceptions of the expense, and especially the value, of travelling within GB towns and cities.

Factors influencing value for money of travel within towns/ cities: Type of ticket

- **Expense**: Mean score out of 10
  - 5.8 for tickets just for journey being made
  - 6.3 for purchased multiple tickets, short season tickets or passes etc.

- **Value for money**
  - 6.6 for tickets just for journey being made
  - 7.0 for purchased multiple tickets, short season tickets or passes etc.

Mean scores out of 10:

- **Expense**: 5.8 (25% 38% 52%) vs. 6.3 (19% 14% 50%)
- **Value for money**: 6.6 (2% 12% 33%) vs. 7.0 (2% 8% 38%)

Figures circled show significance of >95%

**Base**: All visited GB for a holiday recently and used public transport to travel within towns / cities (715)

Q29 / Q30 / Q31: *When you were using trains or buses, trams, river buses/boats, or hired bikes did you purchase tickets or pay just for the journey you were making or did you purchase multiple tickets, short period season ticket or other means of saving money for multiple journeys?*
Some other factors emerged which also show potential to help improve ratings

6. GB attractions which do not charge an entrance fee
   - Attractions are another significant driver of overall holiday value
   - If visitors felt all or most attractions were free, their ratings of GB attractions were more positive
   - However;
     - 3 / 4 GB holiday visitors felt all or most attractions charged fees
     - 4 / 10 say they did not visit an attraction as it was too expensive (6 / 10 families)

7. Classical concerts/operas and theatres elicit the best value ratings of any GB entertainment
   - More visitors to GB attend theatres than visitors to either France or Italy
   - However, entertainment is one of the weaker drivers of overall value for money of a GB holiday

8. Although flying dominates and is seen as relatively good value for money, non-air travel is rated slightly better value among those short-haul markets closest to GB (Netherlands and Belgium)
   - However, this is unlikely to have a majority impact on overall value ratings representing only a small proportion of total GB holiday visitors
Conclusions
Conclusions

■ The survey highlights some positive news about GB holidays

■ Despite lower ratings on expense and value for money the overall positively towards GB holidays remains very encouraging and competitive
  – 9/10 favourably compared the experience of holidaying in GB with other holidays they had taken (7 out of 10 or more)
    – A similar level to both Italy and France

■ GB ratings on the value for money of the individual holiday aspects are generally similar to France
■ And although typically behind Italy, only food & drink and accommodation are significantly weaker

■ Expense of travelling to the destination is a strength among short-haul visitors
  – The only expense rating where GB is ahead of Italy
  – And is significantly ahead of France
  – But is slightly behind both among long-haul visitors

■ GB is also strong on the value for money of travel within the country and shopping, with ratings as good as or even slightly ahead of France and Italy
  – And significantly ahead of France on value for money of shopping among long-haul visitors
Conclusions

- However, Britain clearly has a competitive weakness in terms of value for money and expense
  - Rating of holidays in Great Britain are below almost every major European destination on overall value and expense
  - Results show that a poor rating on expense versus other holidays abroad is the biggest influence on why a GB holiday is not rated as being good value for money

- As is true of other capital cities, London negatively impacts ratings on holiday expense for the country as a whole. However, this is compounded by the fact that GB as a holiday destination has a higher proportion of holiday travellers visit its capital city than either Italy or France
  - London’s strengths are shopping, ease and cost saving ways of travelling around the city and the value for money provided by its luxury hotels

- There is some evidence to suggest that encouraging more visitors to explore places in Britain other than London could potentially help improve overall GB ratings, most notably on expense
  - GB holidays are typically rated as being less expensive by those who did not visit London, most notably for accommodation, shopping and entertainment
  - Overall value for money of GB holidays appears particularly strong when only rural or coastal areas are visited
Conclusions

Results indicate that food & drink and accommodation are the two key holiday elements which show the most potential to improve GB’s overall standing for providing value for money holidays

- Both are key drivers of GB holidays being seen as more expensive than other holidays abroad
- Both are key drivers of holidays to GB, Italy and France being rated as good value for money

Results also suggest that these are areas which show room for improvement

- Both are the key competitive weakness for GB when ratings among those who did not visit capital cities are compared across GB, Italy and France
- Food & drink rates lowest of all GB holidays elements, being seen as the most expensive and the poorest value for money
- And food & drink is also a significant competitive disadvantage
Conclusions

- Evidence suggests that the value for money of each individual holiday element (e.g. accommodation, attractions etc.) could potentially be improved if usage increased of the specific experiences or products/services which elicit the best value ratings for each element.

- This in turn could potentially help improve Britain’s overall standing as a good value for money holiday destination.

- The main strengths of any GB products and services are...
  - Bars/pubs as a good place to eat out
  - Luxury hotels for those who can afford them or guest houses/B&Bs for those with lesser budgets
  - Shopping whilst on holiday and among long-haul visitors the use of the tax refund scheme
  - Use of public transport and in particular the purchase of multiple or short season tickets/passes
  - GB attractions which do not charge entrance fees