

US East vs West Coast Consumer Research

Foresight – issue 161

VisitBritain Research

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Introduction

- Almost 4.0 million Americans visited the UK with a total spend of £3.9 billion in 2016. This makes the USA the 2nd largest inbound source market for the UK for volume and the most valuable source market for visitor spending.
- Holiday visits continue to lead in terms of volume of visits from the American market to the UK (45% of all visits). This segment has shown strong growth since 2013, resulting in almost 1.8 million holidays from the USA in 2016.
- California and the New York Tri-State area* are the key areas as they generate the most visits to the UK. The two areas represent 14% and 12% respectively of all visits from the USA to the UK.
- In spring 2017, VisitBritain commissioned market research with The Nursery to gain a deeper understanding of consumers within these key regions.
- This report sets out the key findings of this research. The research set up can be found on the next page.
- To find out more about the USA browse our [USA market page](#) or download our [USA Market and Trade Profile](#), providing insight on trends, perceptions on Britain and how to reach the consumer.

Research set up



Target group

Everyone in this study:

- Was a resident in California or the Tri-State area (New York, New Jersey, Connecticut)
- Had taken a vacation of two nights or more to a foreign country in the last three years (beyond Mexico and Canada)
- Was a decision maker when choosing vacation destinations
- Had either visited Britain in the last three years OR was a non-rejecter of visiting Britain in the next five years (i.e. everyone has some level of interest in visiting Britain)



Research methodology

- online quantitative survey



Number of interviews

- **1,008** interviews New York Tri-State area residents
- **1,003** interviews California residents



Timings

- 31st March – 10th April 2017

Key points

California and New York Tri-State (New York, New Jersey, and Connecticut) are the key areas as they generate most visits to the UK. California generates 14% of all visits from the USA to the UK, New York Tri State generates 12% of visits*. VisitBritain commissioned market research with The Nursery to gain a deeper understanding of consumers within these key regions.

Some highlights from the study:

1. Californians are more likely to go on international vacations and to go to Europe.
2. Italy is the most visited destination in Europe for travellers from the Tri-State while France is top for Californians, Britain is third for each.
3. Californians are more likely to feel that they have more opportunity to travel, tend to stay longer and are less likely to travel solo.
4. International travellers from California are more likely to say they really want to visit Britain.
5. Vacation barriers are very similar for East vs West coast. Safety and security fears are the biggest barrier for both states when choosing a destination.
6. International travellers in the Tri-State area are more likely to want to sunbathe and get pampered on vacation – things that Britain is less likely to be associated with.
7. Going somewhere new, experiencing different cultures, and new experiences are relatively strong vacation motivations. 'Natural beauty' could be a good driver of intent to visit as well. Knowledge, however, is very low – less than a third felt that they knew a lot about Britain as a destination yet London and the typical landmarks and associations come through strongly.

1. International travellers from the key states

International travellers from the key states – key points

- International travellers in California are more likely to have travelled further afield to Europe and Asia, whereas Tri State residents are more likely to vacation within North America.
- Californians are more likely to feel that they have more opportunity to travel: 51% agree, vs 42% in Tri-State.
- Californians take more international vacations per year, with 55% taking two or more international vacations per year, against 48% in Tri State.
- Italy is the most visited destination in Europe for travellers from the Tri-State while France is top for Californians. Britain is third for each.
- Social media use is similar for each coast, though Californians are more likely to visit Instagram and Snapchat.
- TV: Respondents in the Tri-State area are more likely to watch NBC, CBS, TBS, HGTV and Showtime.

International travellers in California are slightly wealthier and are more likely to be Asian American (1)

Income	California	Tri-State area
Under \$60,000	18%	19%
\$60,000-\$99,999	30%	32%
\$100,000-\$149,999	26%	26%
\$150,000+	21%	18%
Rather not say	5%	5%

Ethnicity	California	Tri-State area
White or Caucasian	67%	74%*
Asian American	18%*	8%
Hispanic or Latino	8%	7%
Black or African-American	3%	7%*
Other	3%	2%
Prefer not to say	1%	1%

*Significant positive difference @ 95% confidence

Base: California (1,003), Tri-State area (1,008)

Note on ethnicity: this sample is international travellers excluding people who have only been to Canada and/or Mexico. If this was a sample of residents then Hispanic would be higher in California

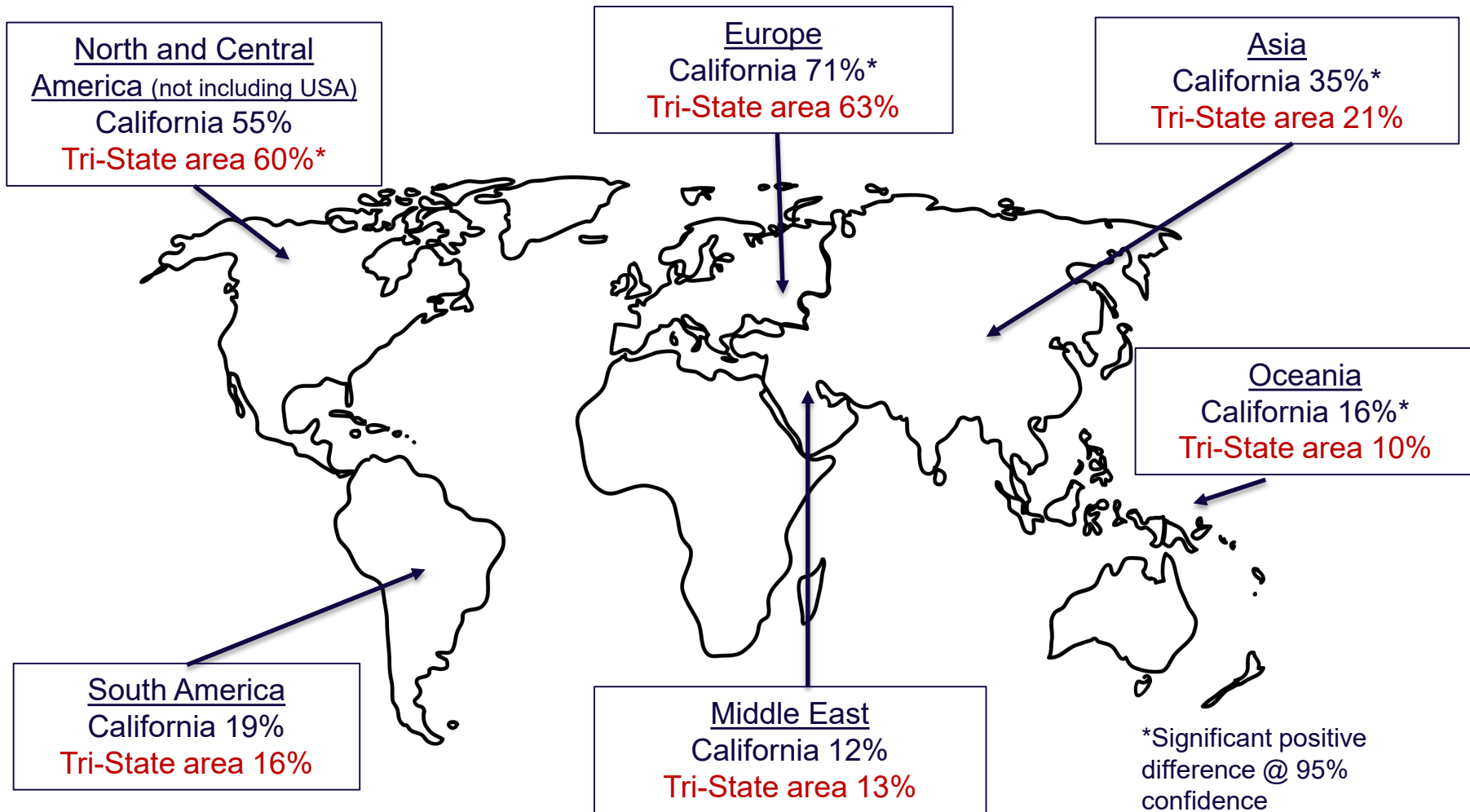
International travellers in California are slightly wealthier and are more likely to be Asian American (2)

Age	California	Tri-State area
18-24	11%	11%
25-34	18%	18%
35-44	22%	22%
45-54	23%	24%
55-64	15%	15%
65+	10%	10%

Base: California (1,003), Tri-State area (1,008)






Note on ethnicity: this sample is international travellers excluding people who have only been to Canada and/or Mexico. If this was a sample of residents then Hispanic would be higher in California

International travellers in California are more likely to have travelled further afield to Europe and Asia. Relatively few travel to the Middle East



S3 Which of these countries / regions have you visited for 2 or more nights in the past 3 years for leisure purposes? Base: California (1,003), Tri-State area (1,008)

Italy is the most visited destination in Europe for travellers from the Tri-State while France is top for Californians

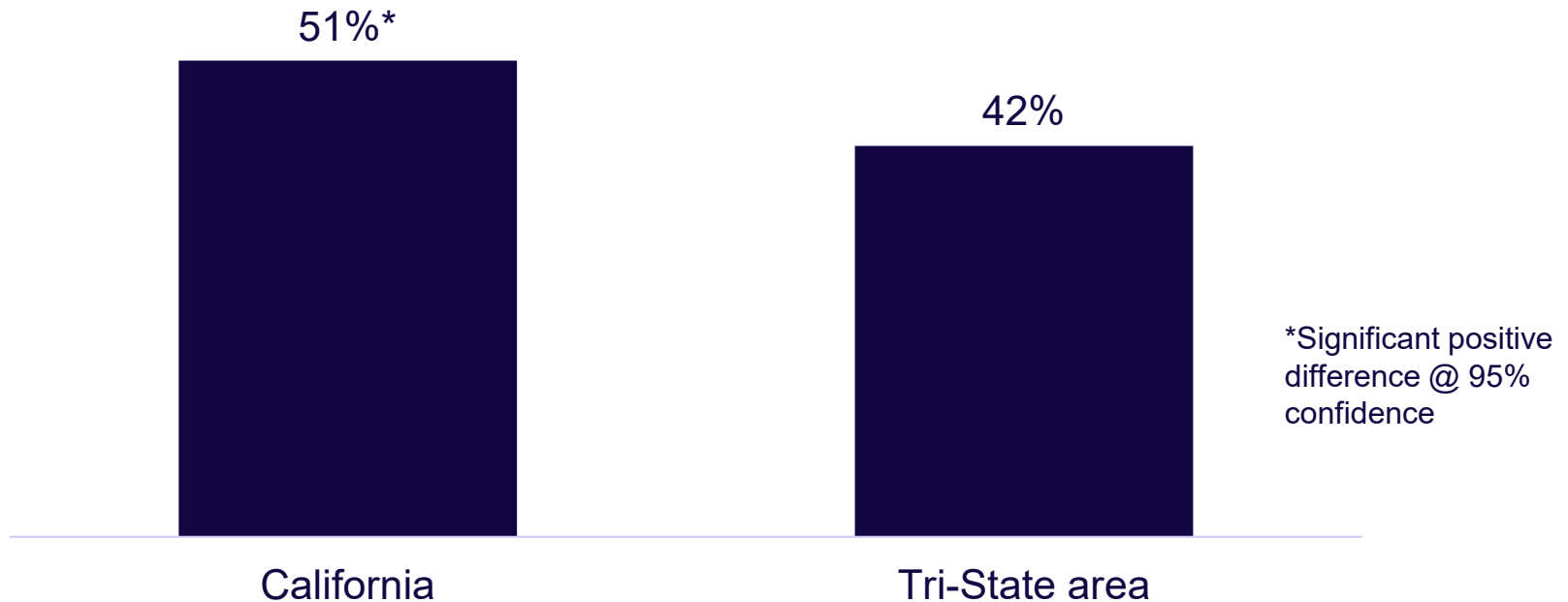
1.		California 28% Tri-State area 26%
2.		California 31%* Tri-State area 22%
3.		California 21% Tri-State area 18%
4.		California 18% Tri-State area 16%
5.		California 19%* Tri-State area 12%



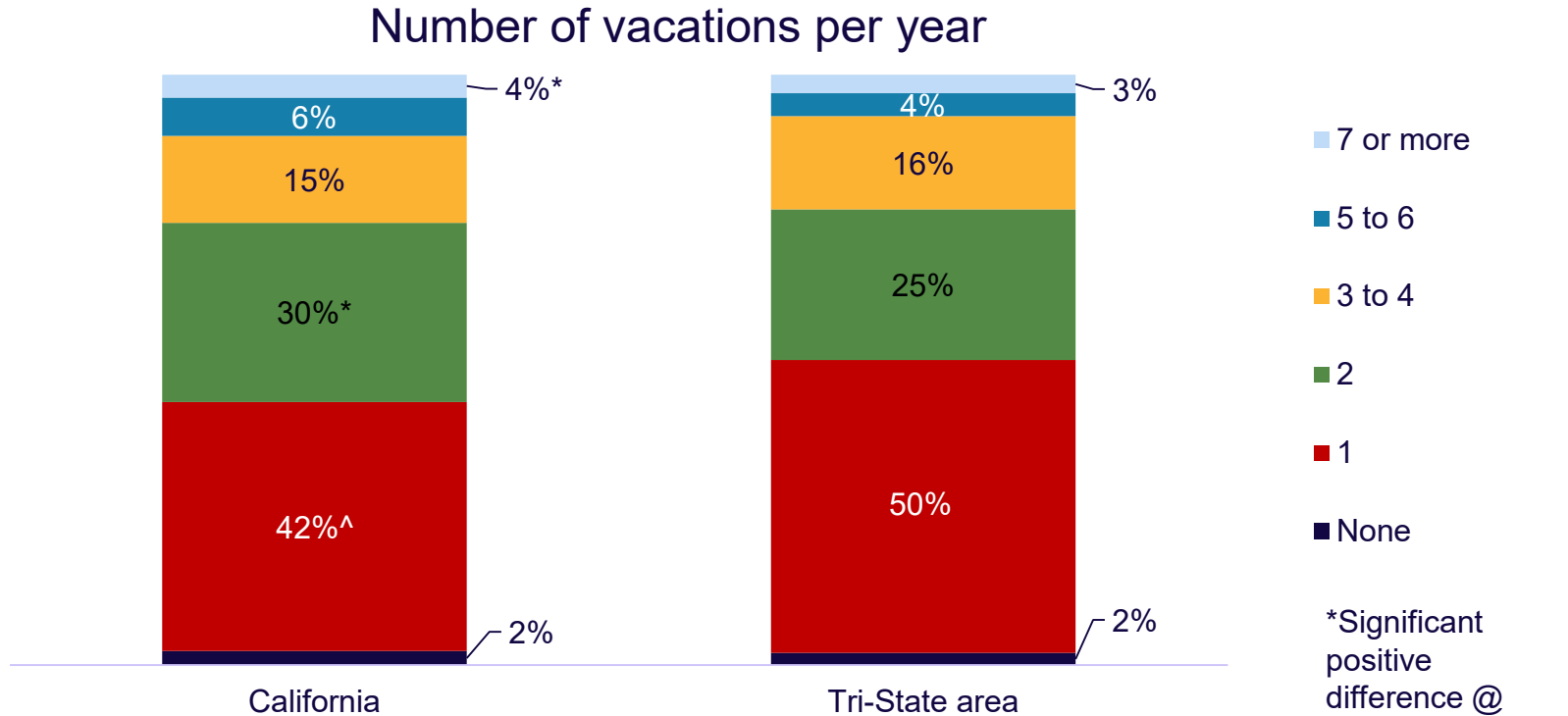
*Significant positive difference @ 95% confidence

Those in California feel they have more opportunity to travel - particularly those aged 25-54

I have lots of opportunity to travel



Californians take more international vacations per year

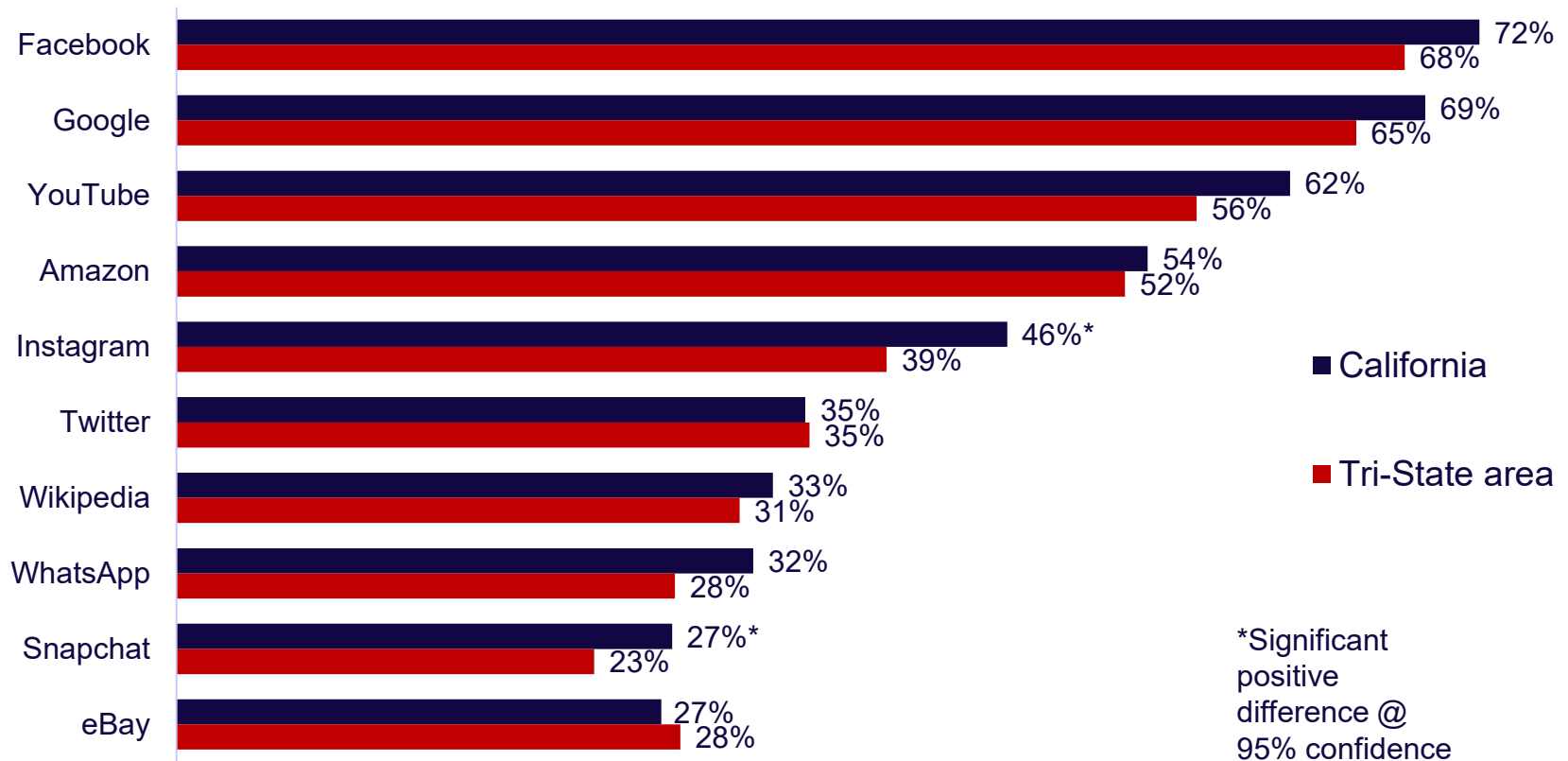


Net	California	Tri-State area
2 days or more	55%*	48%

Note: this is a sample of people who have been on international vacations
 Q1 On average how many international vacations abroad do you take per year?
 Base: California (1,003), Tri-State area (1,008)

Californians are more likely to visit Instagram and Snapchat (1)

Proportion visiting social media platforms

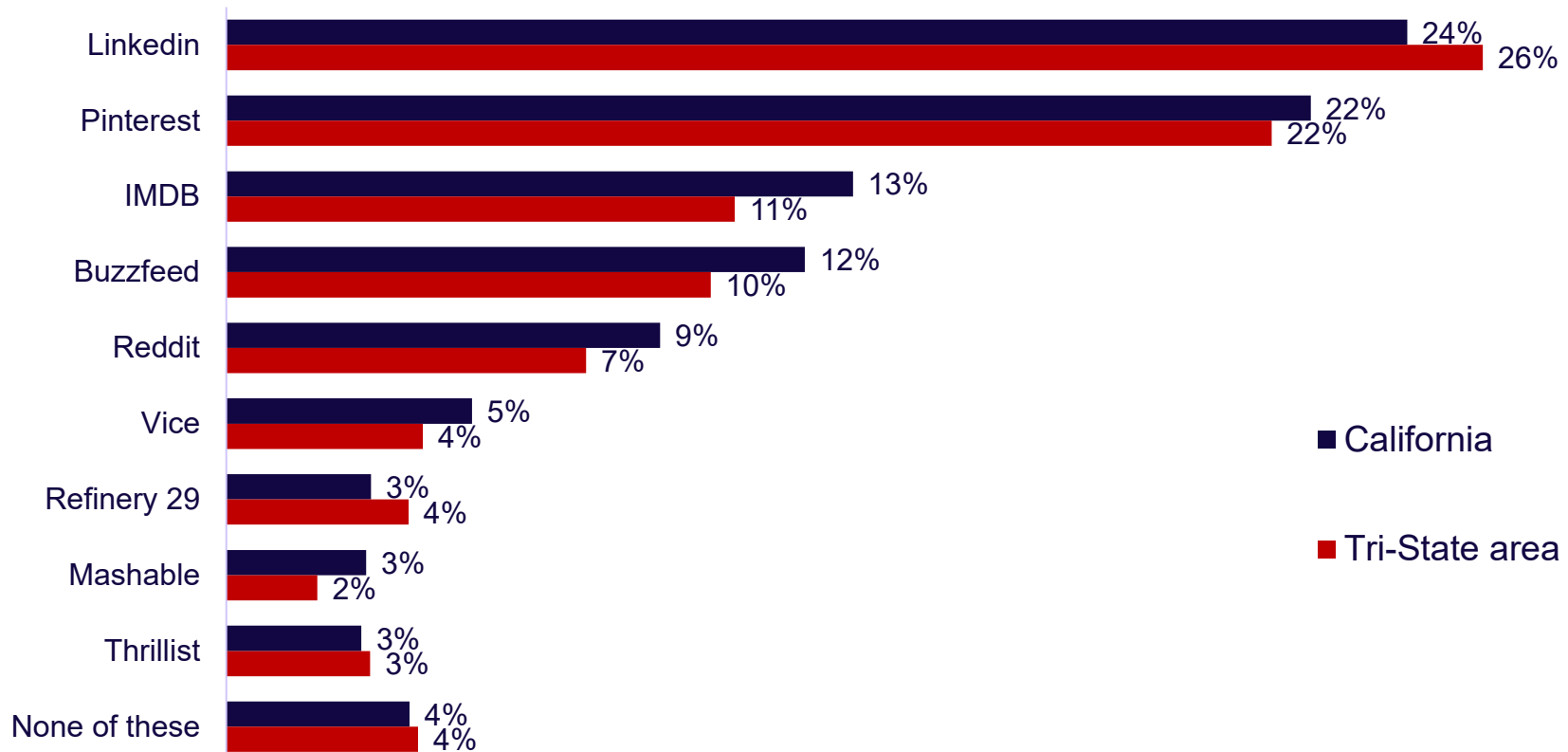


Q30 And which of the following websites or social media platforms do you visit regularly?

Base: California (1,003), Tri-State area (1,008)

Californians are more likely to visit Instagram and Snapchat (2)

Proportion visiting social media platforms

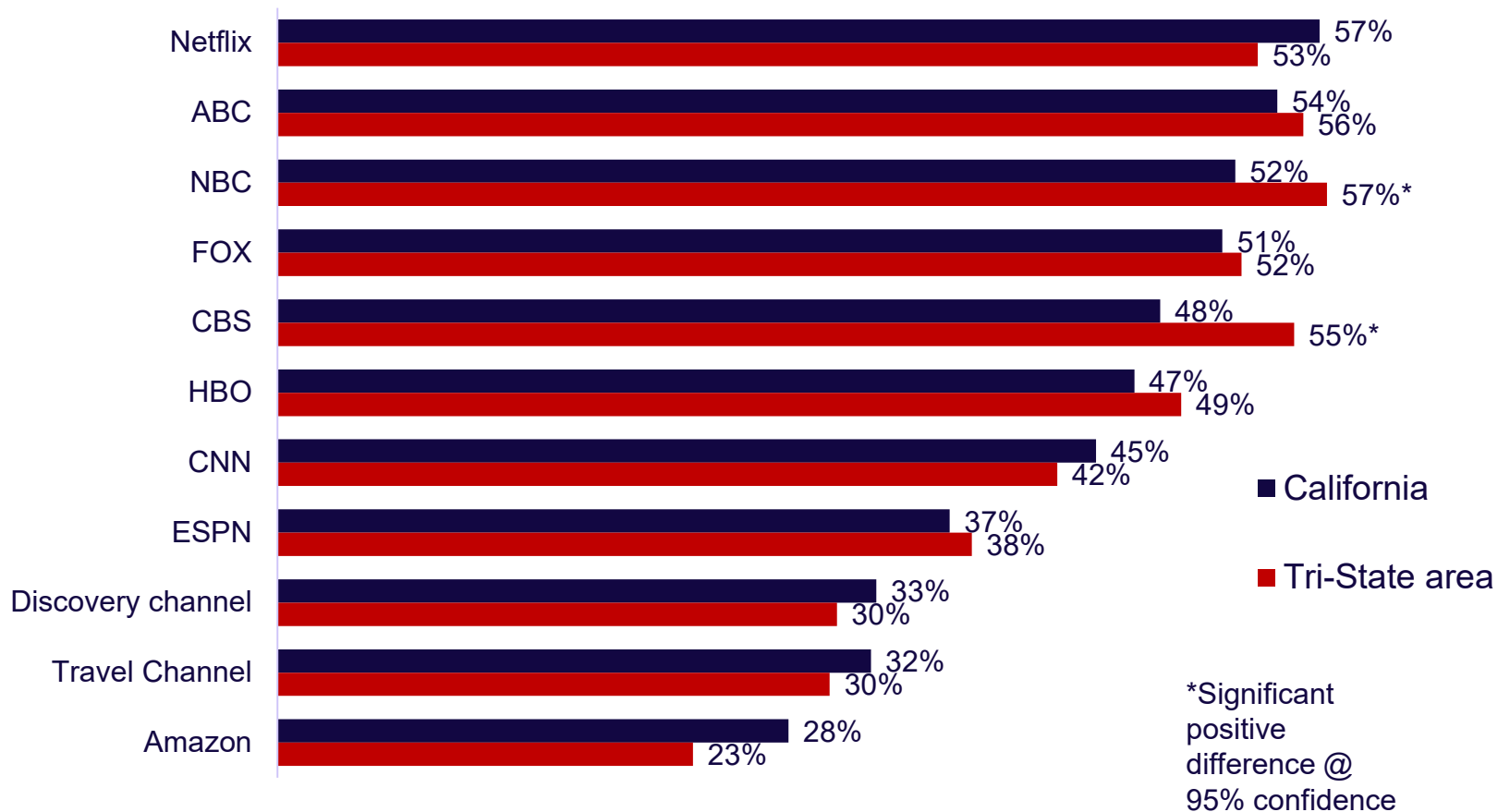


Q30 And which of the following websites or social media platforms do you visit regularly?

Base: California (1,003), Tri-State area (1,008)

Respondents in the Tri-State area are more likely to watch NBC, CBS, TBS, HGTV and Showtime (1)

TV channels watched

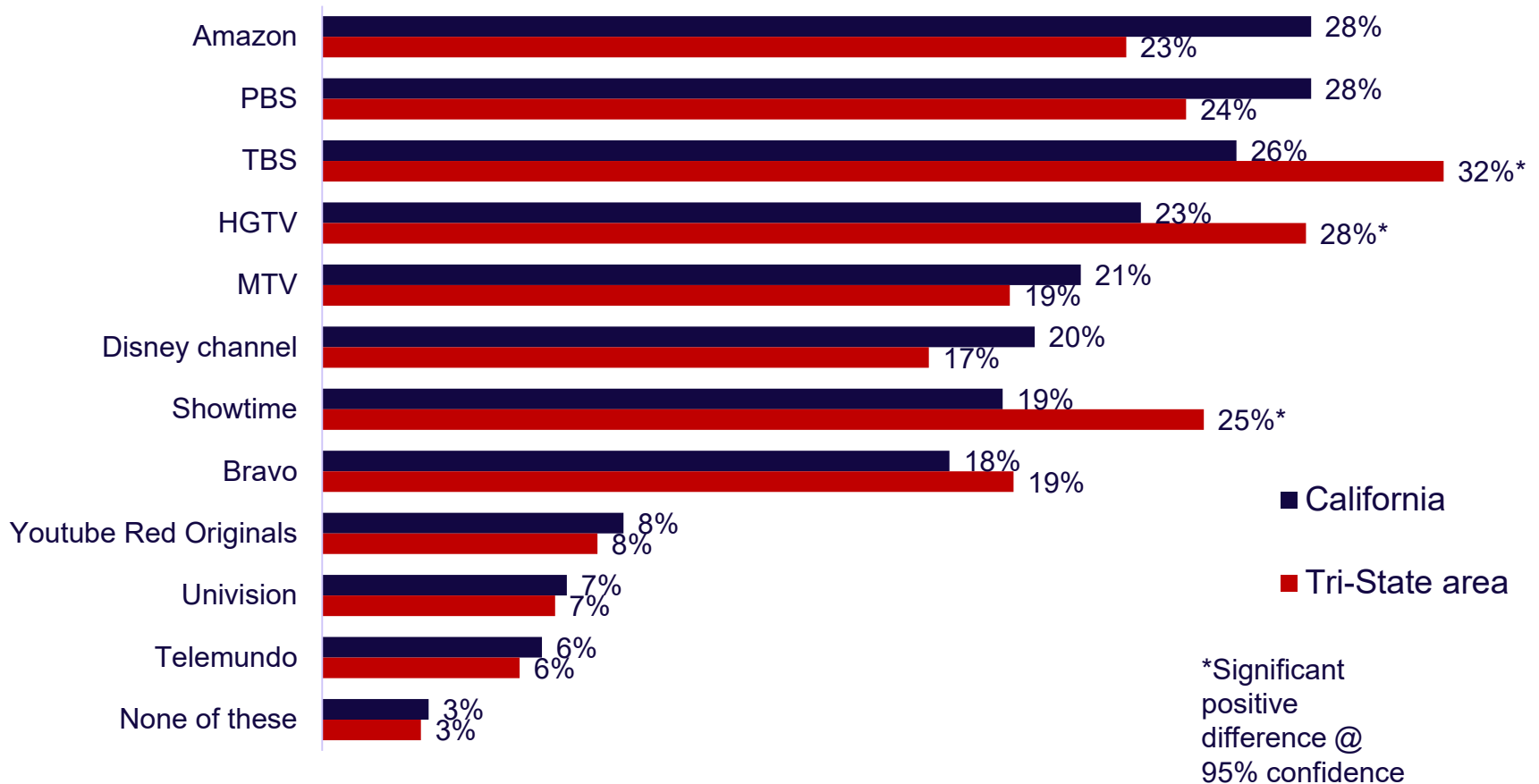


Q27 Which of these TV channels do you regularly watch?

Base: California (1,003), Tri-State area (1,008)

Respondents in the Tri-State area are more likely to watch NBC, CBS, TBS, HGTV and Showtime (2)

TV channels watched



Q27 Which of these TV channels do you regularly watch?

Base: California (1,003), Tri-State area (1,008)

International travel – differences by age

Continent Destination by age	18-34 years	35-44 years	45+ years
Europe	71%	73%	63%
North and Central America*	62%	60%	54%
Asia	31%	33%	24%
South America	23%	24%	11%
Oceania	16%	19%	9%
Middle East	14%	11%	11%



50%

of travellers aged 18 to 34
have lots of opportunity to
travel

52%

of travellers aged 35 to 44
have lots of opportunity to
travel

41%

of travellers aged 45+
have lots of opportunity to travel

International travel most visited European countries – differences by age

European country	Aged 18 - 34
Italy	31%
France	30%
Spain	22%
Britain	18%
Germany	17%

European country	Aged 35 - 44
France	36%
Italy	33%
Spain	21%
Britain	20%
Germany	20%

European country	Aged 45+
Italy	22%
France	21%
Britain	20%
Spain/Germany	13%
The Netherlands	7%

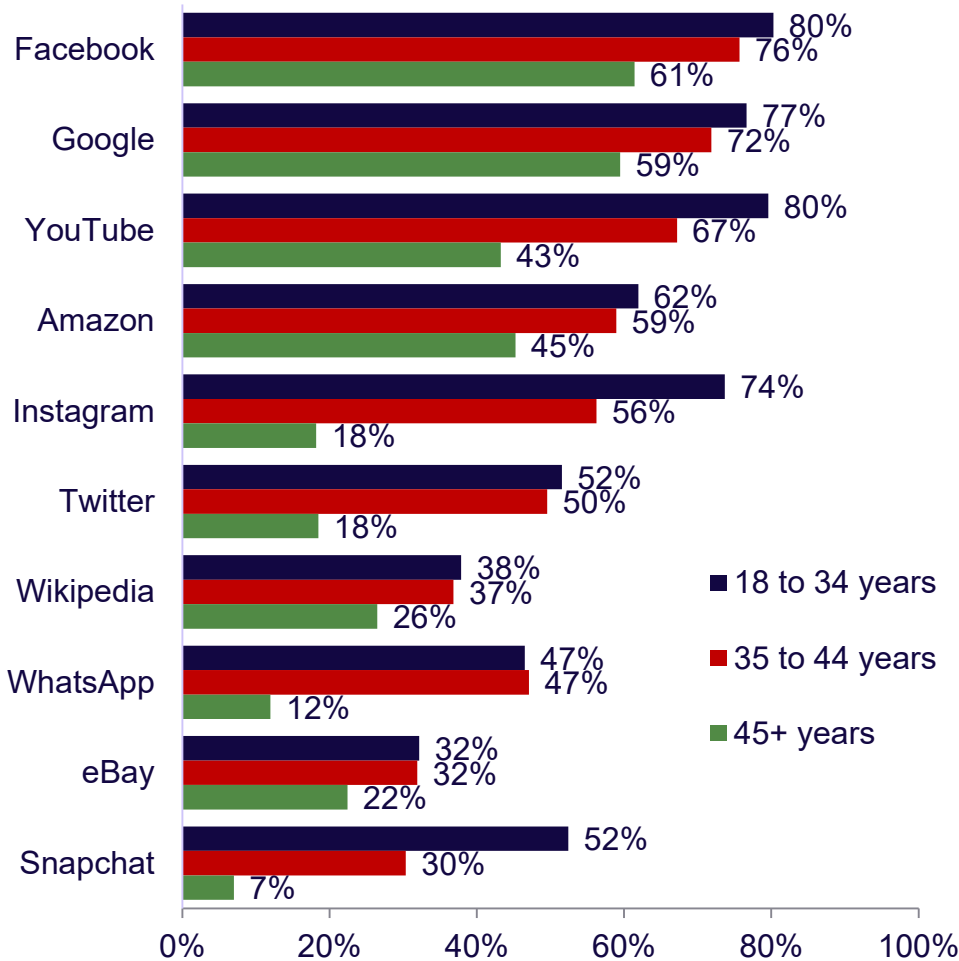
68%
of travellers aged
18 to 34
take two or more
international
vacations per year

64%
of travellers aged
35 to 44
take two or more
international
vacations per year

37%
of travellers aged
45+
take two or more
international
vacations per year

Social media use – differences by age

Top 10 websites/social media



Top 5 social media sites by 18-34 years

- Facebook (80%)
- YouTube (80%)
- Google (77%)
- Instagram (74%)
- Amazon (62%)

Top 5 social media sites by 35-44 years

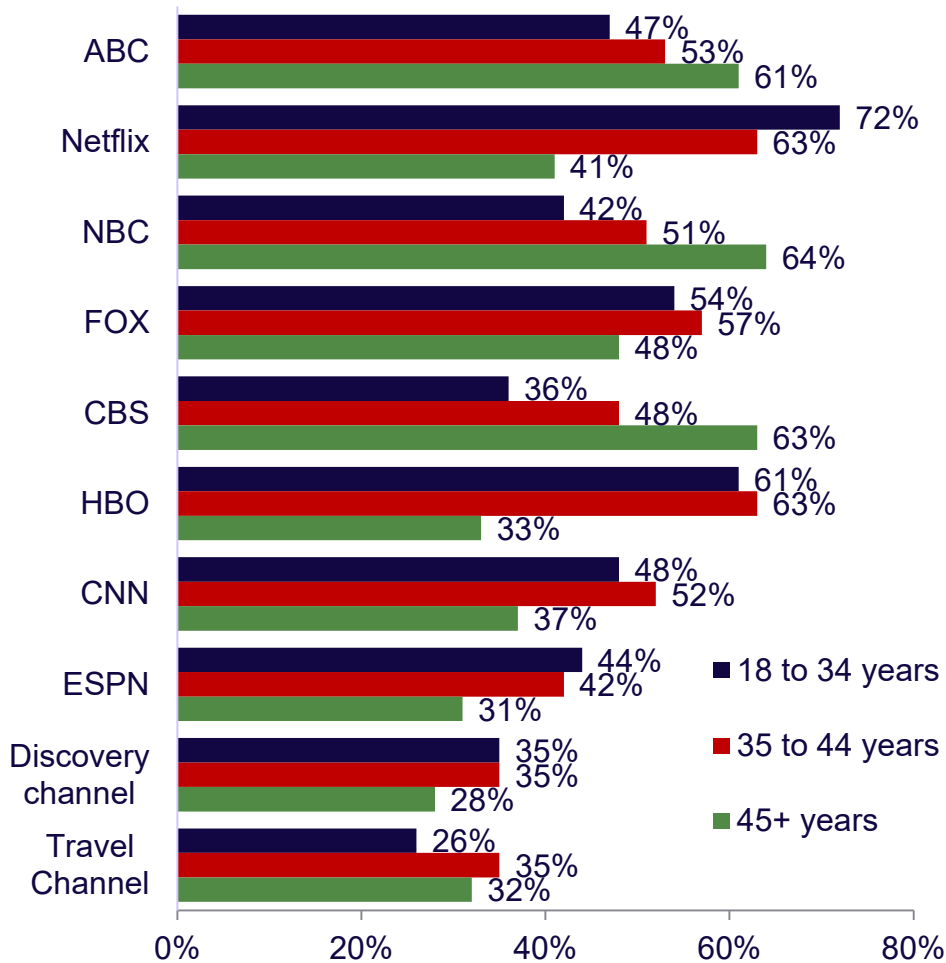
- Facebook (76%)
- Google (72%)
- YouTube (67%)
- Amazon (59%)
- Instagram (56%)

Top 5 social media sites by 45+ years

- Facebook (61%)
- Google (59%)
- Amazon (45%)
- YouTube (43%)
- Wikipedia (26%)

TV use – differences by age

Top 10 TV Channels



Top 5 TV channels by 18-34 years

- Netflix (72%)
- HBO (61%)
- FOX (54%)
- CNN (48%)
- ABC (47%)

Top 5 TV channels by 35-44 years

- HBO (63%)
- Netflix (63%)
- FOX (57%)
- ABC (53%)
- CNN (52%)

Top 5 TV channels by 45+ years

- NBC (64%)
- CBS (63%)
- ABC (61%)
- FOX (48%)
- Netflix (41%)

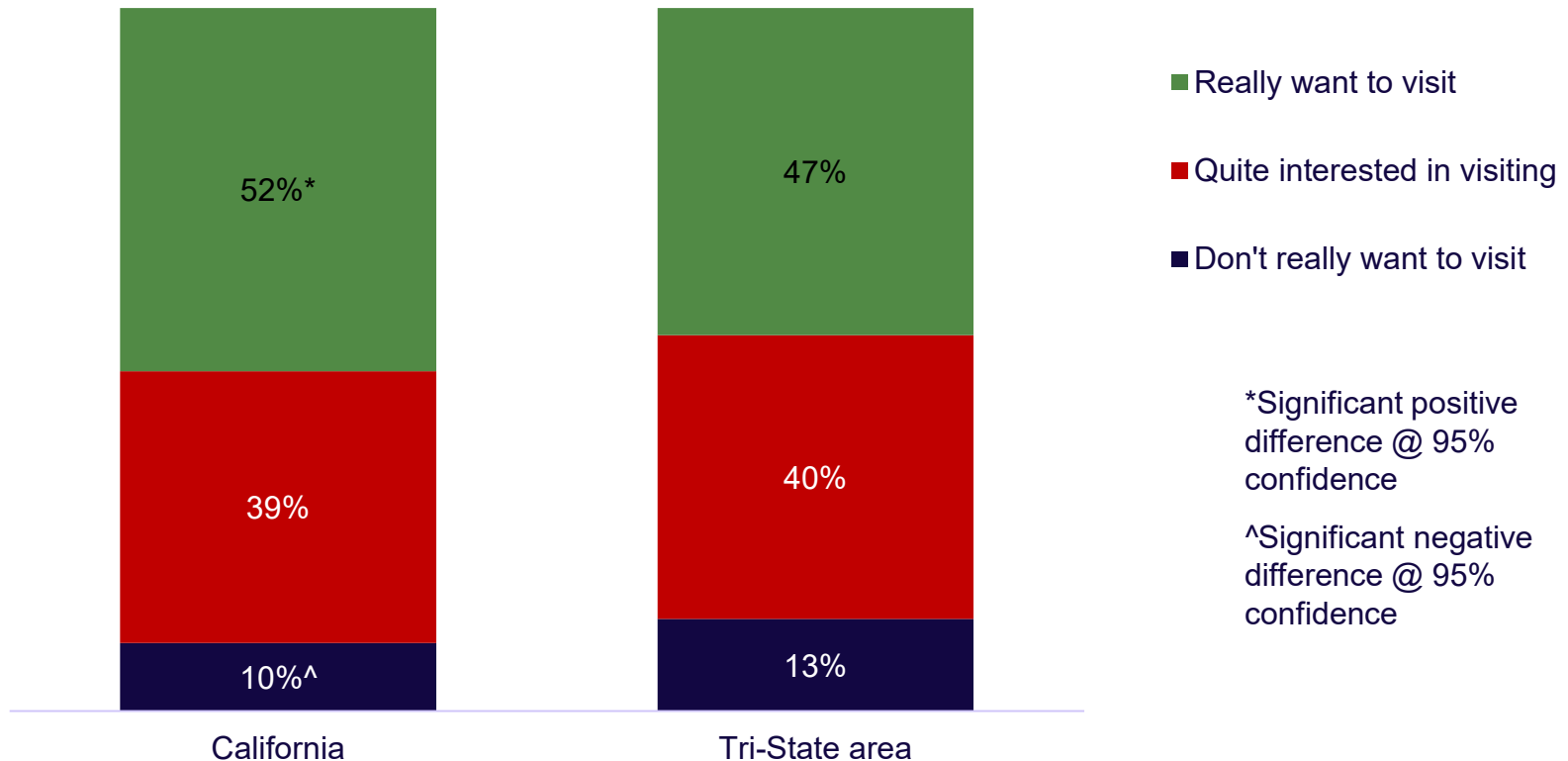
2. Visitors to Britain

Visitors to Britain – key points

- Californians' trips to Britain are more likely to be longer, to be with friends/family, more likely to be repeat visits and to be part of multi-country trips.
- International travellers from California are more likely to say they really want to visit Britain (52% vs 47%)
- Visitors to Britain from California tend to be older than their counterparts in the Tri-State area. Younger travellers from the Tri State area are more likely to have visited Britain than their peers in California.
- Californians are more likely to be repeat visitors to Britain. 35% of Tri State visitors to Britain have been once vs only 21% from California.
- Visitors from California are more likely to take a longer trip to Britain compared to those from the Tri-State area.
- However, Californians are also more likely to visit multiple countries as part their trip to Europe, with France, Italy and Spain top choices. Tri-Staters are more likely to only visit Britain on their visit.
- Those in the Tri-State area are more likely to have travelled alone to Britain.

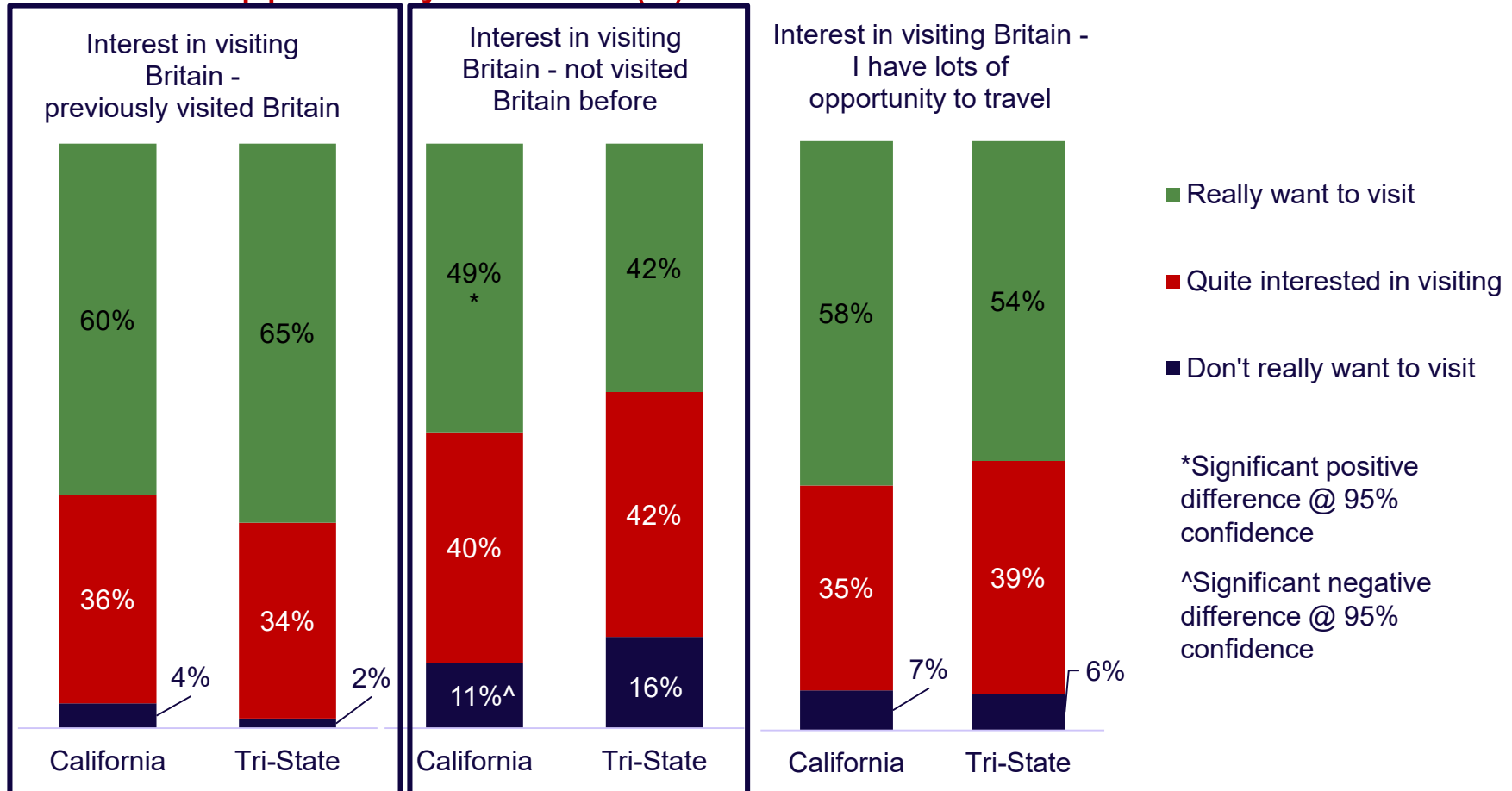
International travellers from California are more likely to say they really want to visit Britain – and this difference exists amongst those who have the opportunity to travel (1)

Interest in visiting Britain – all respondents



Q23a On the scale below where 0 is 'I really don't want to visit' and 10 is 'I really want to visit' how much would you like to visit Britain? Base: California (1,003), Tri-State area (1,008); Visited before (211,182), not visited Britain before (792, 826), have lots of opportunity to travel (739, 661)

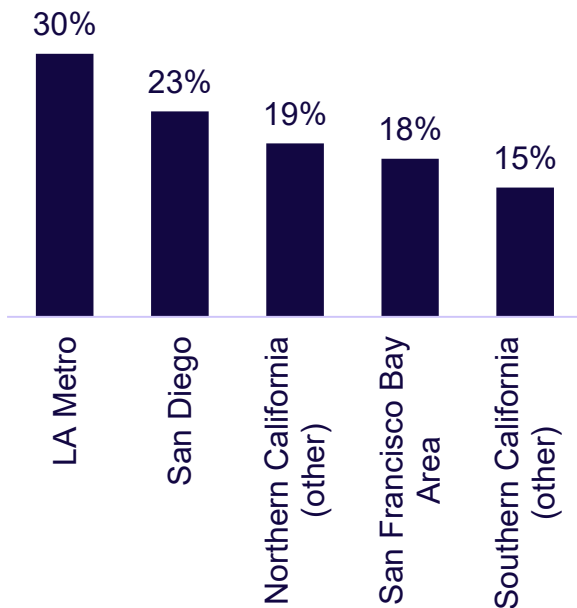
International travellers from California are more likely to say they really want to visit Britain – and this difference exists amongst those who have the opportunity to travel (2)



Q23a On the scale below where 0 is 'I really don't want to visit' and 10 is 'I really want to visit' how much would you like to visit Britain? Base: California (1,003), Tri-State area (1,008); Visited before (211, 182), not visited Britain before (792, 826), have lots of opportunity to travel (739, 661)

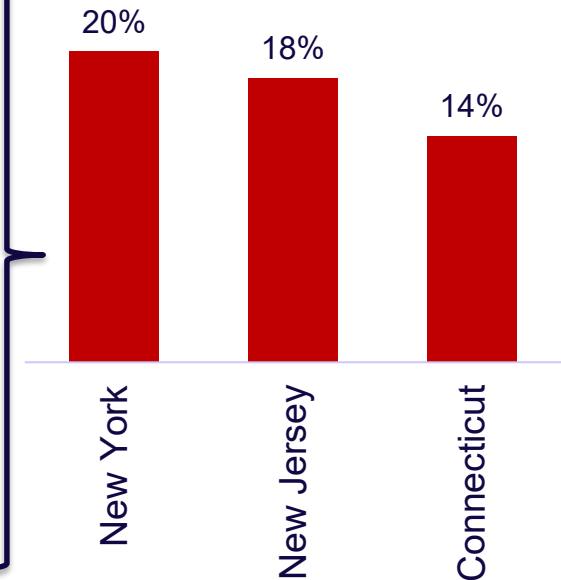
In California those from the LA Metro area are most likely to have visited Britain

Visited Britain in past 3 years - California



New York Region*	% Visited Britain
Queens	26%
Manhattan	23%
Up State New York	17%
Long Island	16%
Brooklyn	14%

Visited Britain in past 3 years
Tri-State area



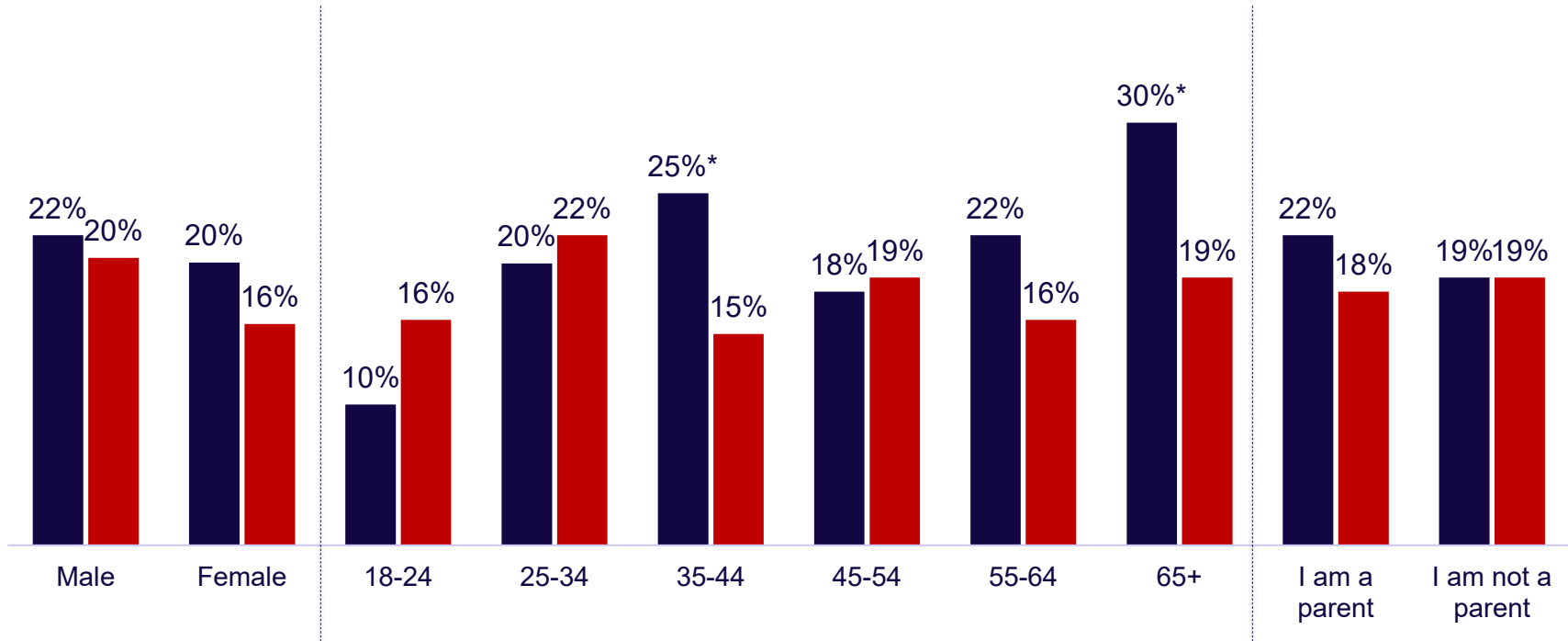
* The Bronx, Staten Island, Down State New York not shown as base sizes lower than 50

Visitors to Britain from California tend to be older than their counterparts in the Tri-State area

Visited Britain in past 3 years

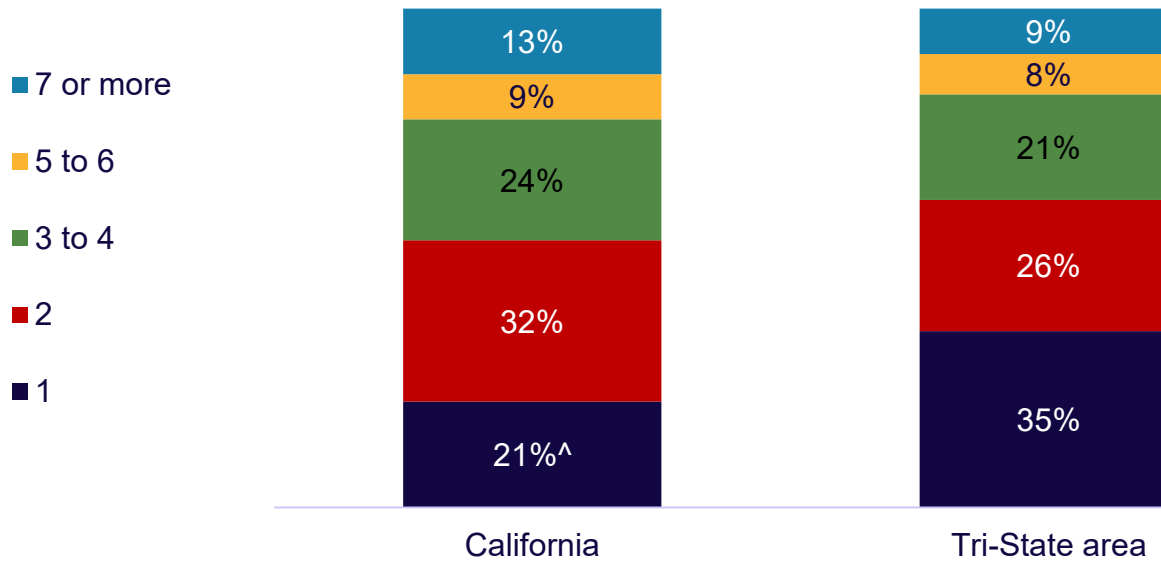
■ California ■ Tri-State area

*Significant positive difference @ 95% confidence



Californians are more likely to be repeat visitors to Britain

Number of vacations to Britain



*Significant positive difference @ 95% confidence

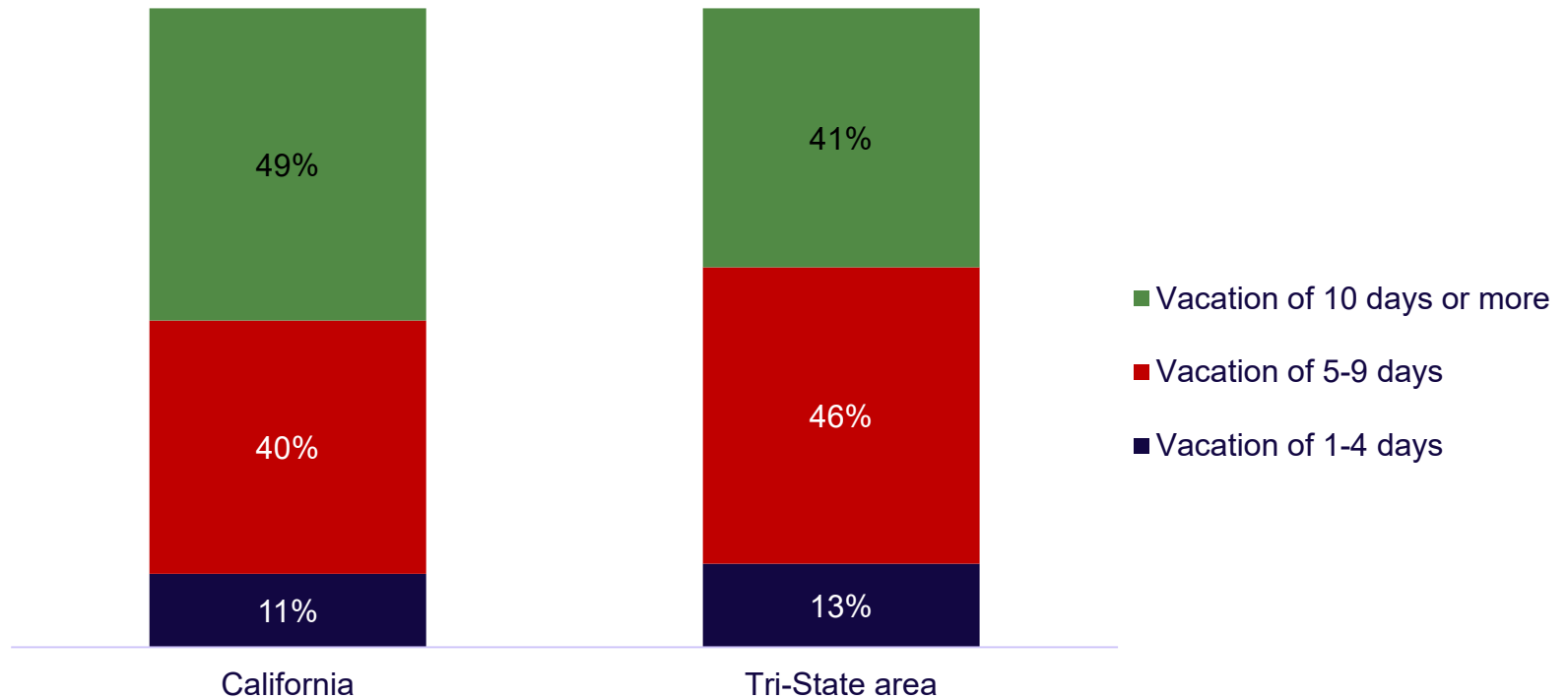
[^]Significant negative difference @ 95% confidence

Repeat visitors	California	Tri-State area
Net: 2 or more visits	79%	65%
Average number of trips	California	Tri-State area
Britain visitors	3.9*	3.3

Q2a Earlier you mentioned you had visited Britain. How many times have you visited Britain for a vacation?
 Base: All who have visited Britain; California (211), Tri-State area (182).

Visitors from California are more likely to take a longer trip compared to those from the Tri-State area

Length of vacation to Britain



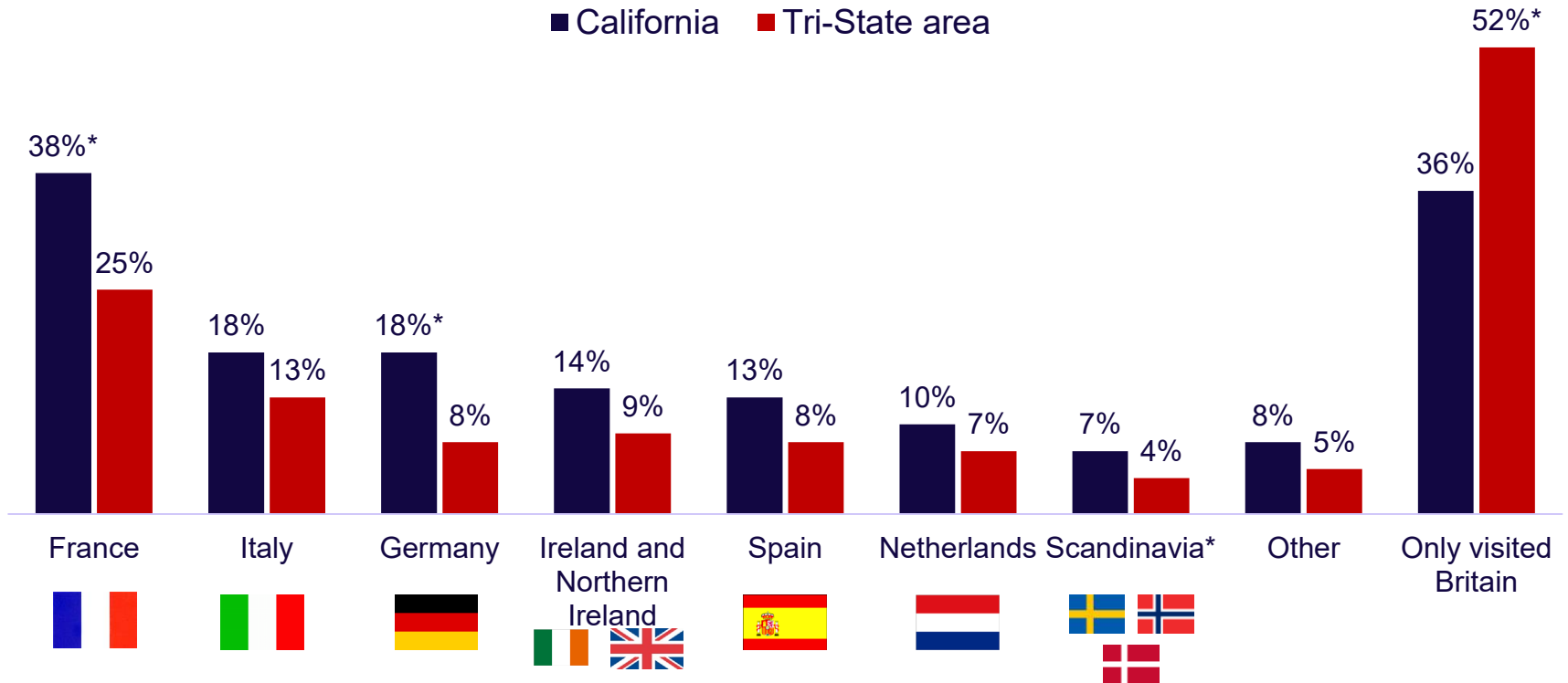
Q17 Which of these best describes your (most recent) vacation to Britain?

Base: All who have visited Britain; California (174), Tri-State area (153)

Californians are more likely to visit multiple countries as part their trip to Britain, with France, Italy and Spain top choices. Tri-Staters are more likely to only visit Britain on their visit

Other countries visited on the same vacation

*Significant positive difference @ 95% confidence

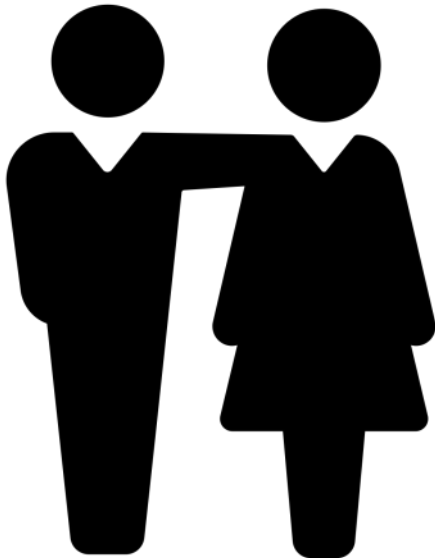


Q16 When you visited Britain did you visit any other countries at the same time?

Base: All who have visited Britain; California (211), Tri-State area (182)

* Sweden, Norway, or Denmark

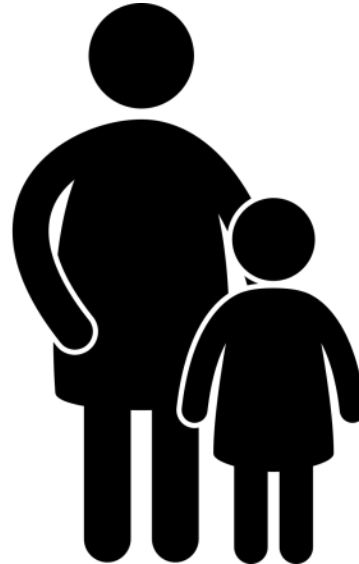
Those in the Tri-State area are more likely to have travelled alone to Britain (Tri-State visitors are slightly younger)



I travel - with a spouse/partner

California 61%*

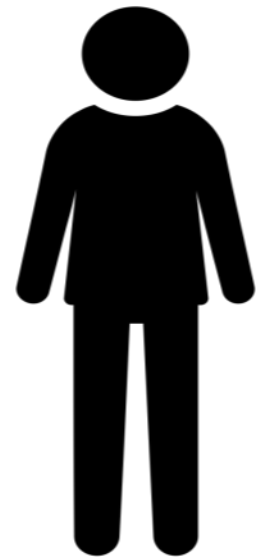
Tri-State area 49%



I travel with children under 16

California 26%*

Tri-State area 16%



I travel on my own

California 19%

Tri-State area 27%*

*Significant positive difference @ 95% confidence

Propensity to visit Britain, by age (1)

Top 3 origin visitors from Tri-State to Britain 18-34 years

New York (64%)

New Jersey (21%)

Connecticut (16%)

Top 3 origin visitors from Tri-State to Britain 35-44 years

New York (71%)

New Jersey (24%)

Connecticut (6%)

Top 3 origin visitors from Tri-State to Britain 45+ years

New York (42%)

New Jersey (34%)

Connecticut (23%)

Top 3 origin visitors from California to Britain 18-34 years*

LA Metro (44%)

San Francisco (23%)

South California (19%)

Top 3 origin visitors from California to Britain 35-44 years

LA Metro (53%)

San Francisco / San Diego (26%)

South California (9%)

Top 3 origin visitors from California to Britain 45+ years

LA Metro (30%)

South California (20%)

San Francisco (19%)

Propensity to visit Britain, by age (2)

Age	18-34	35-44	45+
Really want to visit Britain	55%	55%	43%
Quite interested in visiting Britain	37%	35%	43%
Don't really want to visit Britain	8%	10%	14%

70%
of travellers aged
18 to 34*
visited Britain two
or more times for
a vacation
in the past (repeat
visitors)

77%
of travellers aged
35 to 44
visited Britain two
or more times for
a vacation
in the past (repeat
visitors)

71%
of travellers aged
45+
visited Britain two
or more times for
a vacation
in the past (repeat
visitors)

Visiting Britain, by age (1)

Visitors to Britain – age/gender	18-34	35-44	45+
Male	58%	55%	52%
Female	42%	45%	48%




Visitors to Britain - age / Income	18-34	35-44	45+
<\$US100,000	55%	43%	36%
≥\$US100,000	43%	56%	56%
Unknown	2%	1%	8%

59% of travellers aged 18 to 34 combined their last vacation to Britain with other countries (especially France, Germany, Italy)

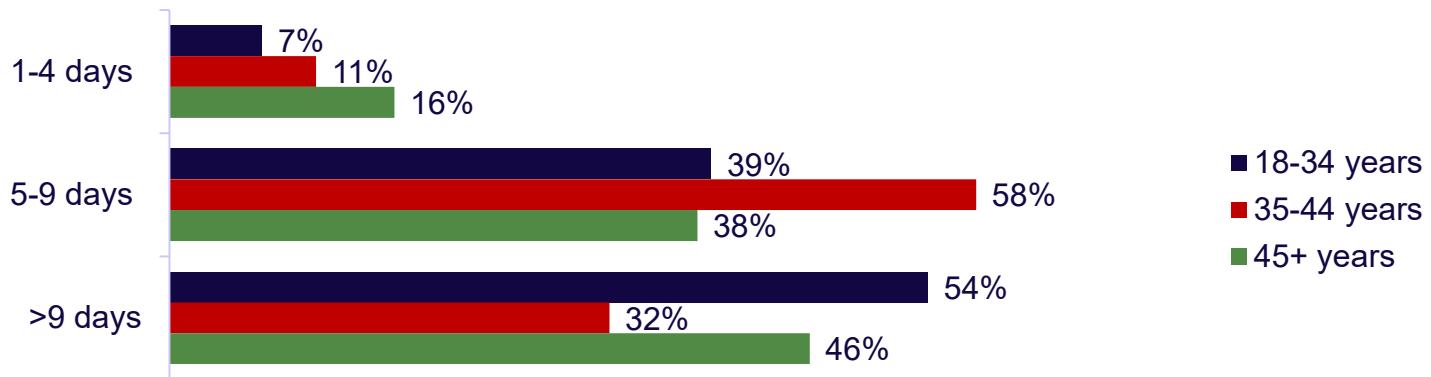
65% of travellers aged 35 to 44 combined their last vacation to Britain with other countries (especially France, Italy, Germany)

52% of travellers aged 45+ combined their last vacation to Britain with other countries (especially France, Ireland)

Visiting Britain, by age (2)

	Last visit to Britain - party	18-34*	35-44	45+
	With spouse/partner	45%	58%	60%
	With children <16	29%	29%	14%
	On my own	26%	25%	20%

Last visit in Britain - length of stay



* Data is indicative due to small base

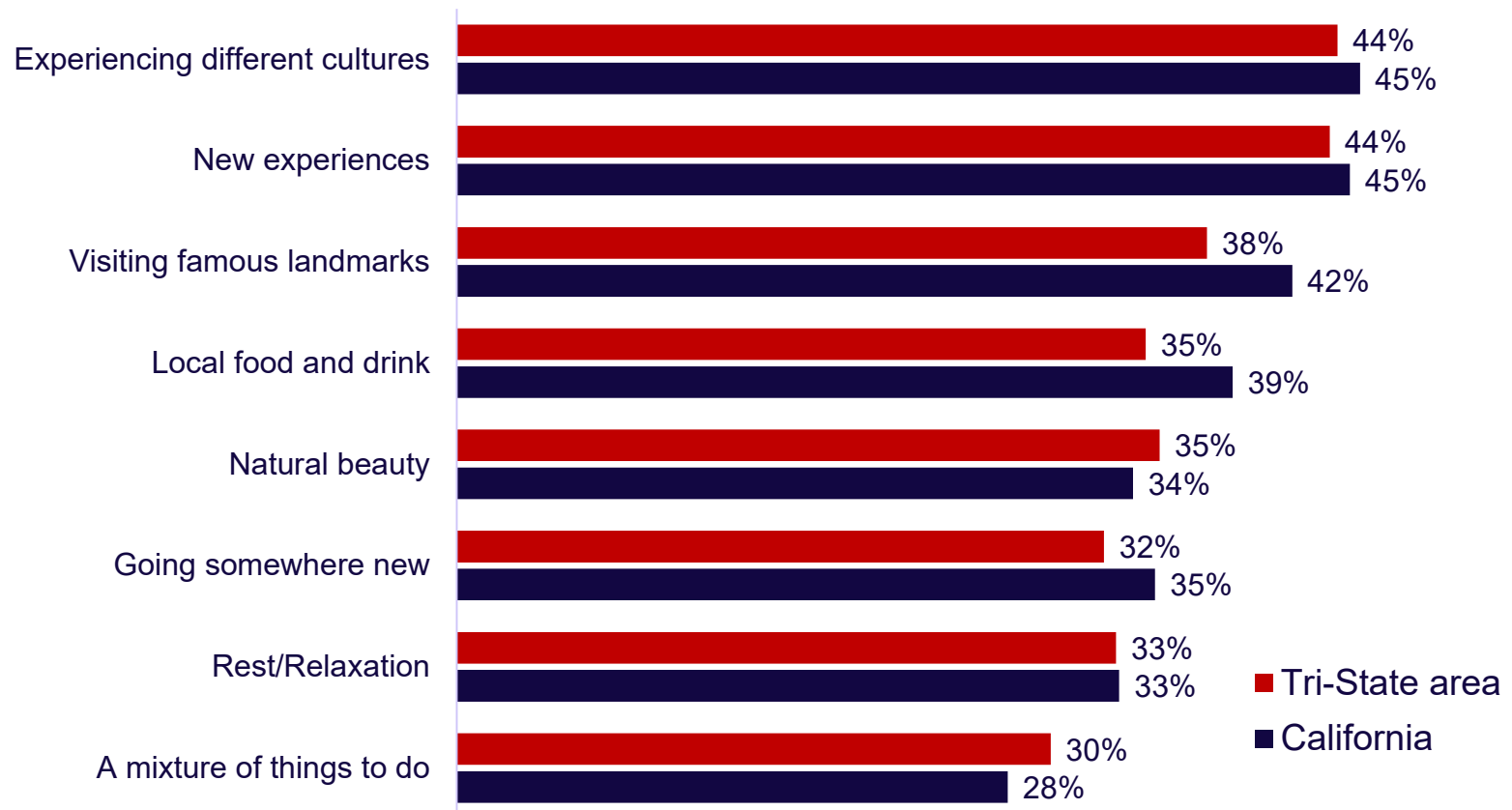
3. Drivers and barriers to international vacations

Drivers and barriers to international vacations – key points

- There are few significant differences in vacation motivations between the coasts. New experiences and different cultures are an important part of international vacations for both. ‘Sunny Weather’ is much more important to travellers in the Tri-State area.
- Sources of influence are also similar. Californians are more likely to use guidebooks, online videos, travel blogs, travel programmes and the travel section in newspapers to plan their vacation.
- Looking at vacation motivations by interest in visiting Britain, those who are *less* interested in visiting Britain say rest and sunny weather are more important. Those who are *more* interested in visiting Britain are more likely to say that New experiences and Visiting famous landmarks are important.
- Vacation activities: those in the Tri-State area are more likely to want to sunbathe or visit a spa. Californians are more likely to want to visit museums/galleries and go walking/hiking.
- Vacation barriers are very similar for East vs West coast. Safety and security fears are the biggest barrier for both states when choosing a destination.

New and different experiences are an important part of international vacations. 'Sunny Weather' is much more important to travellers in the Tri-State area. (1)

Most important things (>10%)

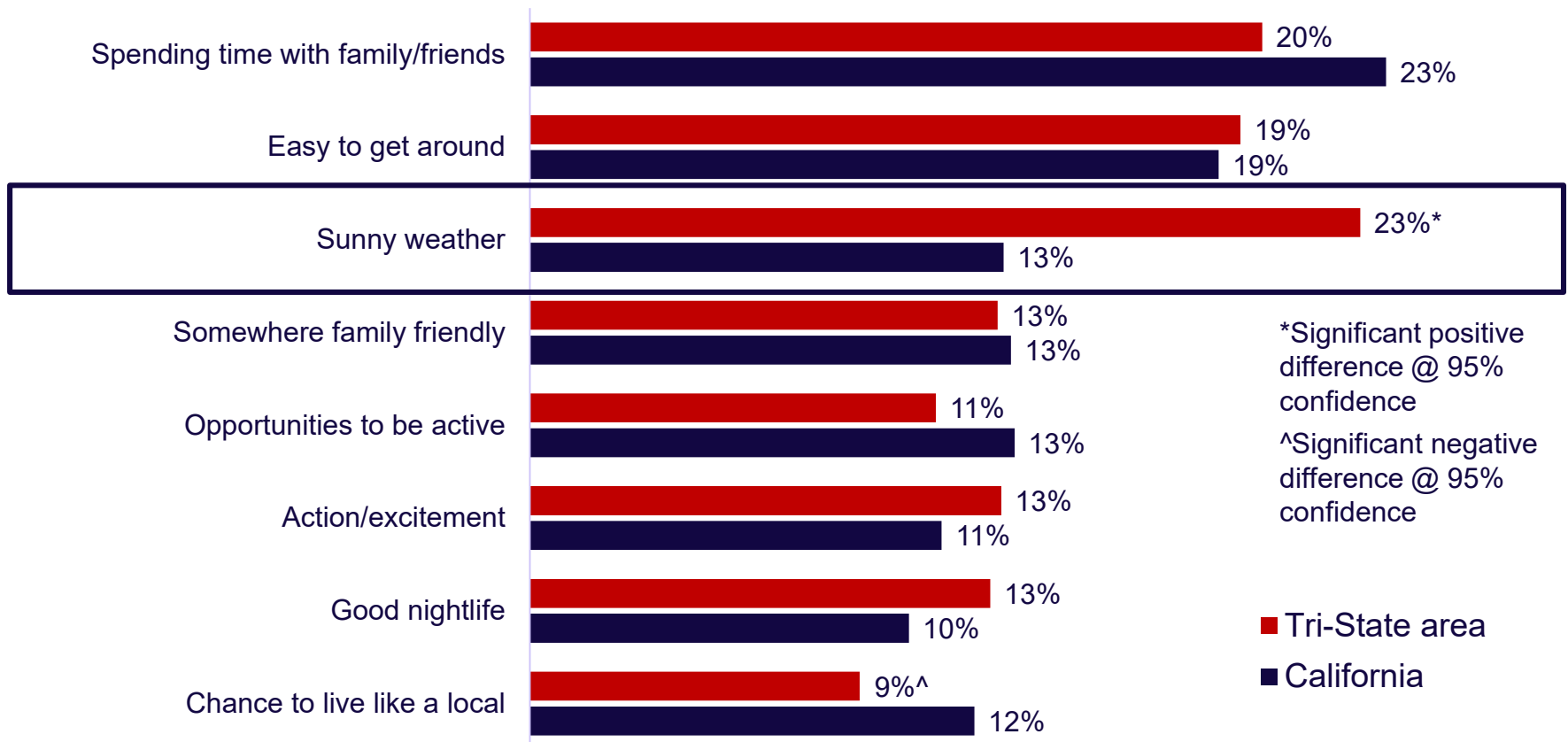


Q5 What are the most important things you look for in an **international vacation**?

Base: California (1,003), Tri-State area (1,008)

New and different experiences are an important part of international vacations. 'Sunny Weather' is much more important to travellers in the Tri-State area. (2)

Most important things (>10%)



Q5 What are the most important things you look for in an **international vacation**?

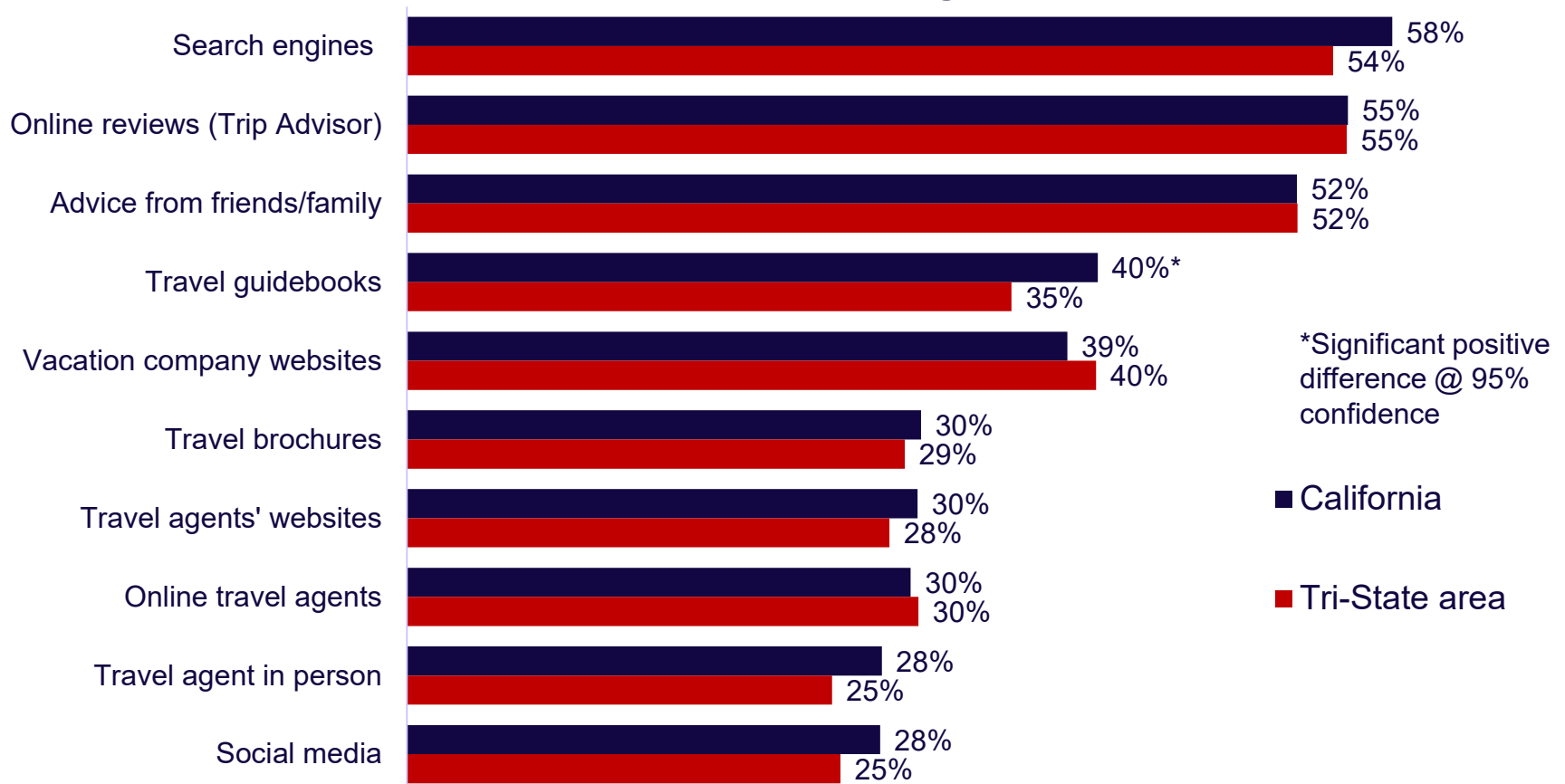
Base: California (1,003), Tri-State area (1,008)

Those who are less interested in visiting Britain say rest and sunny weather is more important

On an international vacation...	Visitors	Would really like to visit	Would quite like to visit	Not interested in visiting
Experiencing different cultures	51%	44%	44%	37%
New experiences	46%	44%	47%	32%
Visiting famous landmarks	48%	41%	38%	26%
Local food and drink	39%	35%	37%	39%
Natural beauty	31%	36%	36%	35%
Going somewhere new	33%	32%	37%	32%
Rest/Relaxation	30%	34%	32%	41%
A mixture of things to do	33%	27%	27%	33%
Spending time with family/friends	16%	23%	23%	24%
Easy to get around	22%	17%	20%	22%
Sunny weather	14%	13%	21%	33%
Somewhere family friendly	12%	16%	11%	9%
Opportunities to be active	13%	11%	12%	13%
Action/excitement	12%	13%	11%	12%
Good nightlife	13%	13%	9%	9%
Chance to live like a local	12%	10%	10%	11%

Californians are more likely to use guidebooks, online videos, travel blogs, travel programmes and the travel section in newspapers to plan their vacation (1)

Sources of information when planning international vacation

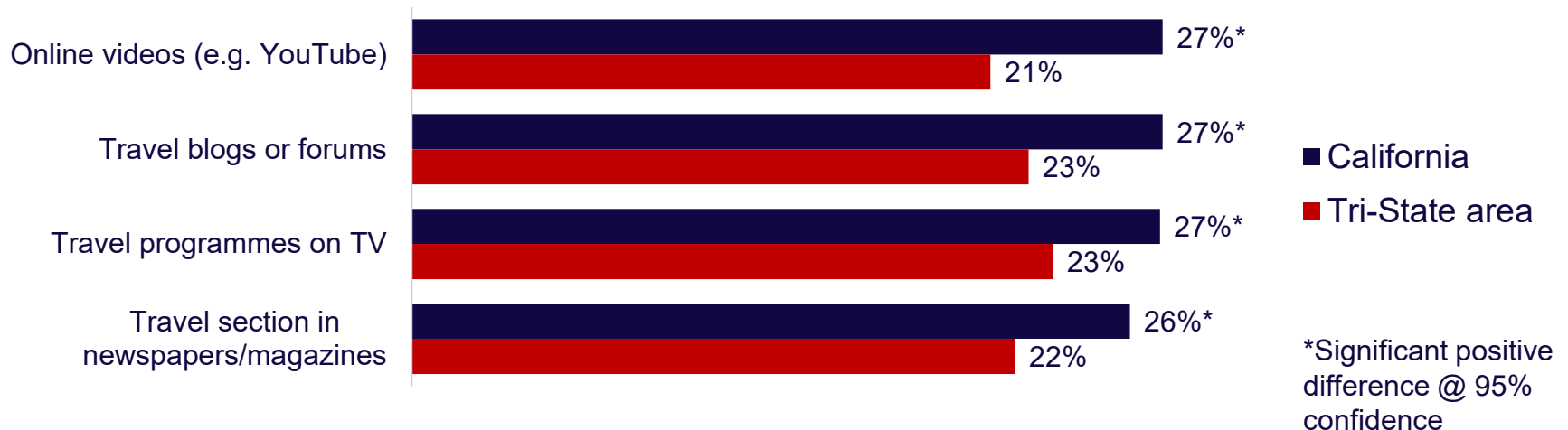


Q4a Which of these do you use to help plan an international vacation?

Base: California (1,003), Tri-State area (1,008)

Californians are more likely to use guidebooks, online videos, travel blogs, travel programmes and the travel section in newspapers to plan their vacation (2)

Sources of information when planning international vacation



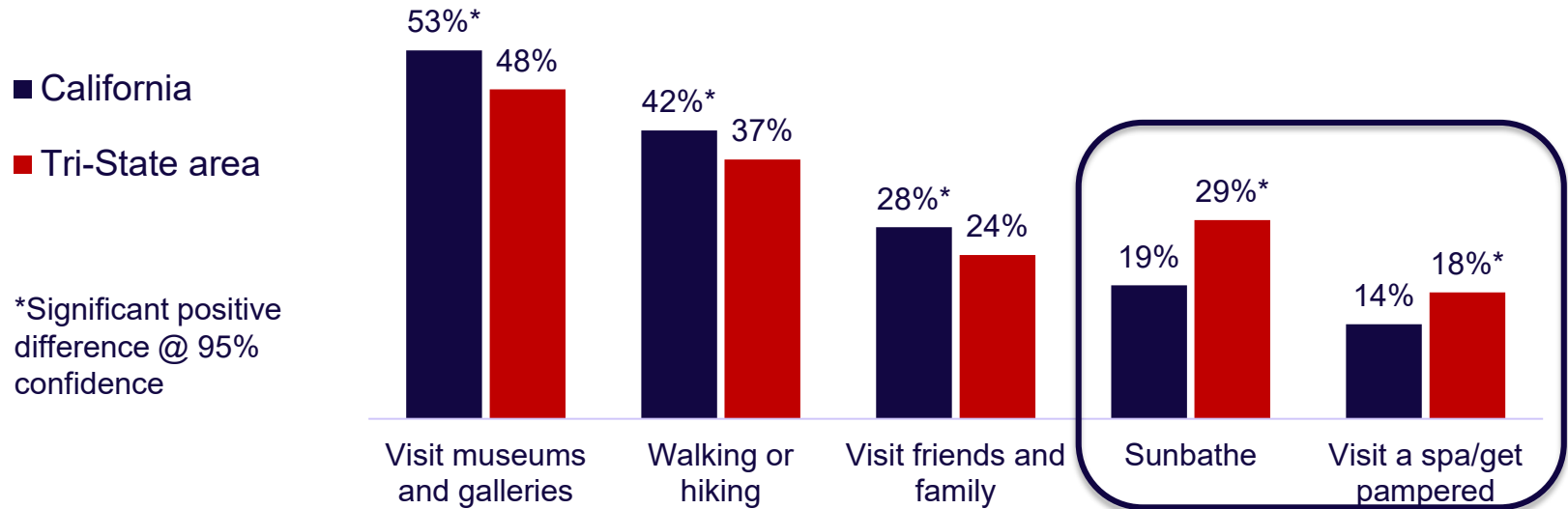
Average	California	Tri-State
Number of sources	4.9	4.6

Q4a Which of these do you use to help plan an international vacation?

Base: California (1,003), Tri-State area (1,008)

Those in the Tri-State area are more likely to want to sunbathe or visit a spa

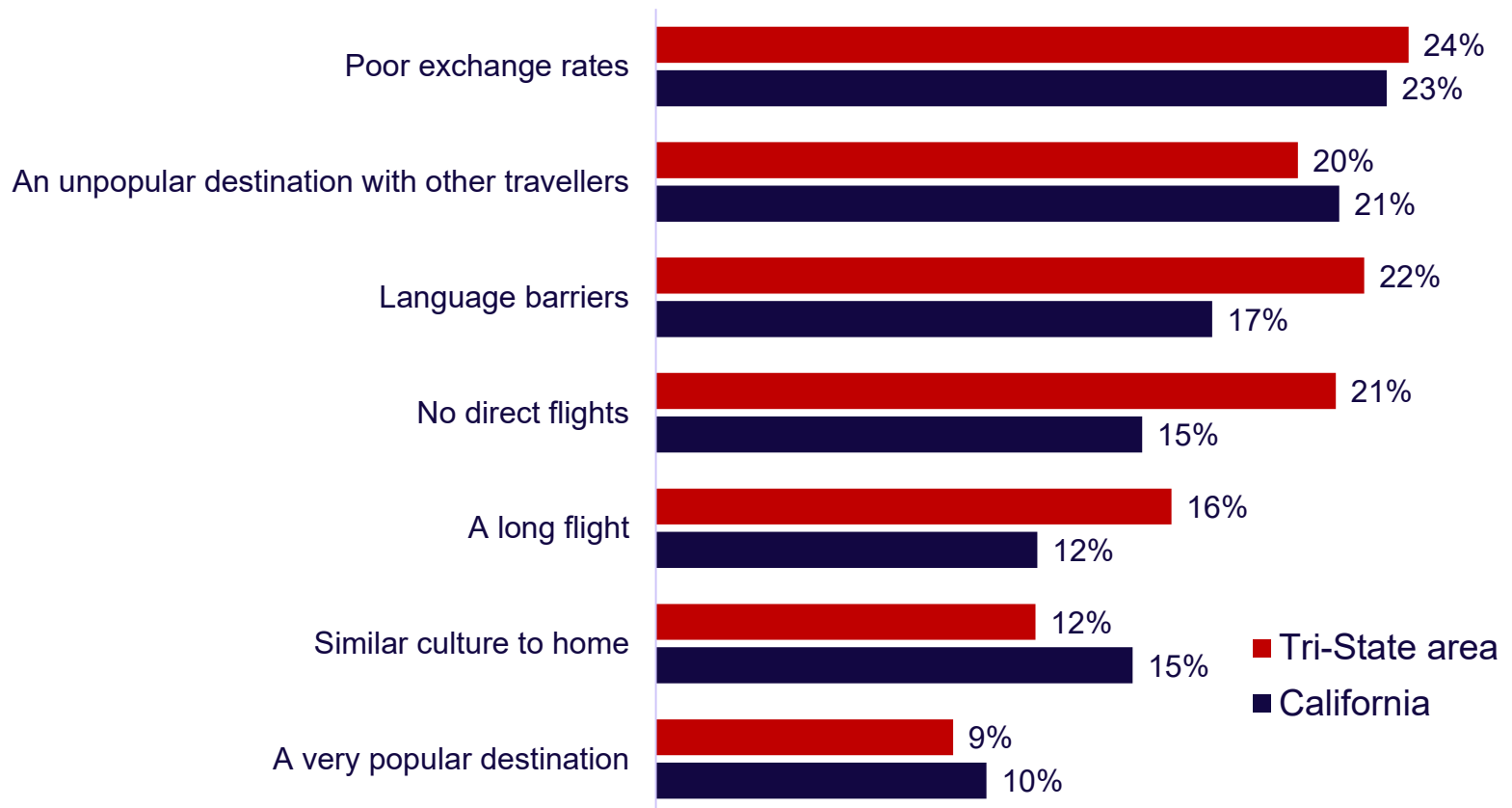
Things like to do on an international vacation – differences between the coasts



Activity Ranking	Visiting museum and galleries	Walking or hiking	Visit friends and family	Sunbathe	Visit a spa/get pampered
California	4 th	8 th	12 th	15 th	18 th
Tri-State area	7 th	8 th	13 th	11 th	16 th

Safety and security fears are the biggest barrier for both when choosing a destination (1)

International vacation barriers



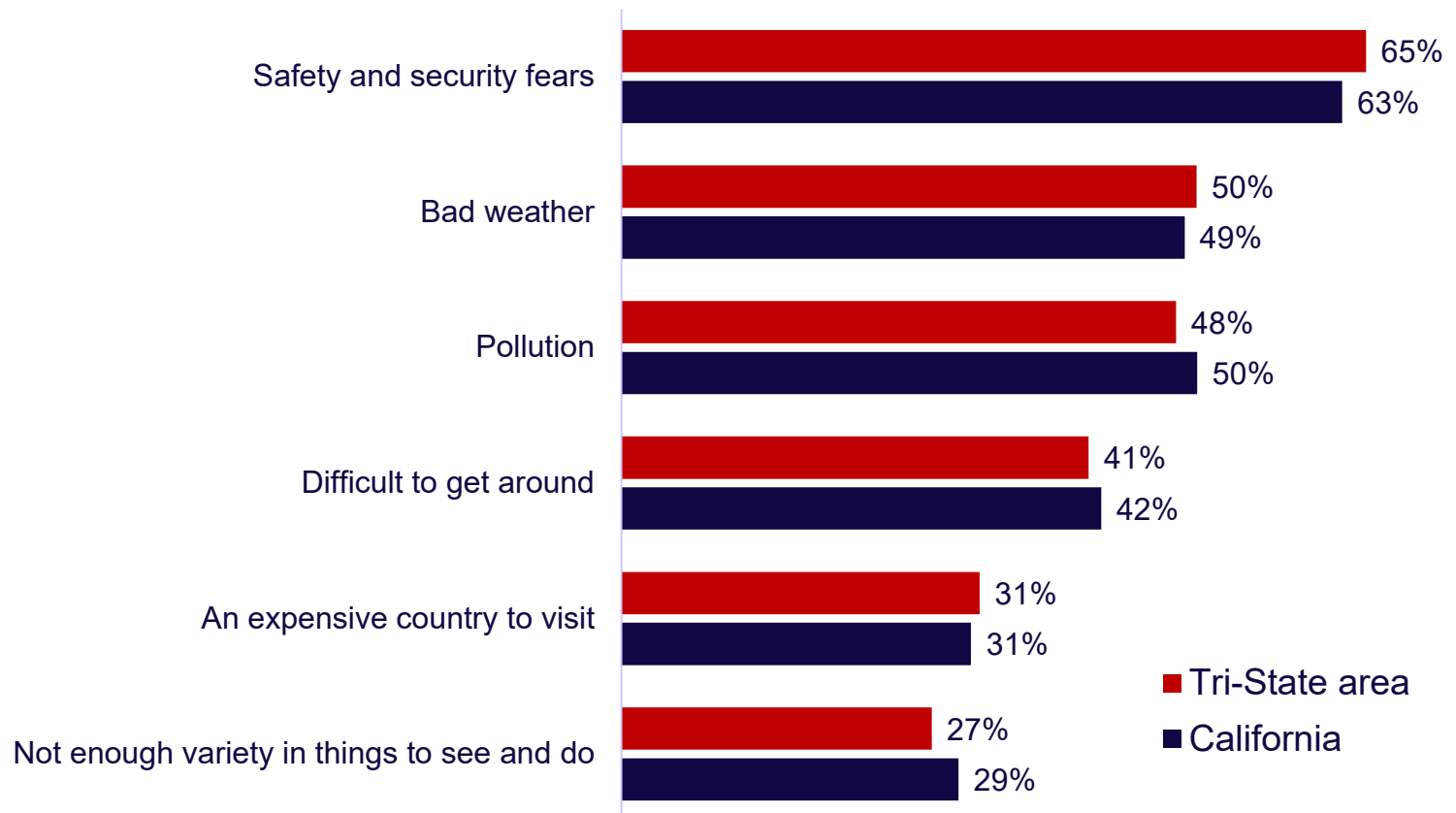
Q6 Which of these would make you **less likely** to choose somewhere for an international vacation?

Base: California (1,003), Tri-State area (1,008)

Note: research took place 9 days after the Westminster attack (22nd March 2017)

Safety and security fears are the biggest barrier for both when choosing a destination (2)

International vacation barriers



Q6 Which of these would make you **less likely** to choose somewhere for an international vacation?

Base: California (1,003), Tri-State area (1,008)

Note: research took place 9 days after the Westminster attack (22nd March 2017)

Drivers/barriers for international travel, by age

Top 5 international vacation drivers 18-34 years

New experiences (43%)

Rest/relaxation (36%)

Experiencing different cultures (34%)

Natural beauty (32%)

Going somewhere new (31%)

Top 5 international vacation drivers 35-44 years

New experiences (45%)

Rest/relaxation (39%)

Experiencing different cultures (38%)

Natural beauty (34%)

Visiting famous landmarks (32%)

Top 5 international vacation drivers 45+ years

Experiencing different cultures (54%)

Visiting famous landmarks (51%)

New experiences (44%)

Local food and drink (43%)

Going somewhere new (39%)

Top 5 international vacation barriers 18-34 years

Safety & security fears (49%)

Pollution (41%)

Bad weather (40%)

Difficult to get around (35%)

Not enough variety in things to see and do (27%)

Top 5 international vacation barriers 35-44 years

Safety & security fears (54%)

Bad weather (46%)

Pollution (43%)

Difficult to get around (34%)

Not enough variety in things to see and do (28%)

Top 5 international vacation barriers 45+ years

Safety & security fears (77%)

Pollution (57%)

Bad weather (57%)

Difficult to get around (48%)

An expensive country to visit (35%)

Vacation activities and sources of influence, by age

Top 5 vacation activities 18-34 years

Explore cities (61%)

Go shopping (56%)

Try local foods & drink (54%)

See famous landmarks (52%)

Enjoy gourmet food & drink (43%)

Top 5 vacation activities 35-44 years

Explore cities (61%)

Try local foods and drink (58%)

See famous landmarks (57%)

Go shopping (51%)

Enjoy gourmet food and drink (49%)

Top 5 vacation activities 45+ years

See famous landmarks (80%)

Try local foods & drink (77%)

Explore cities (77%)

Visit museums & galleries (60%)

Have an authentic local experience (60%)

Top 5 sources of influence 18-34 years

Online reviews (49%)

Advice from friends/family (49%)

Search engines (48%)

Vacation company websites (42%)

Social media (41%)

Top 5 sources of influence 35-44 years

Search engines (56%)

Online reviews (52%)

Advice from friends/family (48%)

Vacation company websites (41%)

Travel agents' websites (39%)

Top 5 sources of influence 45+ years

Search engines (61%)

Online reviews (60%)

Advice from friends/family (56%)

Travel guidebooks (41%)

Vacation company websites (38%)

4. Perceptions of Britain

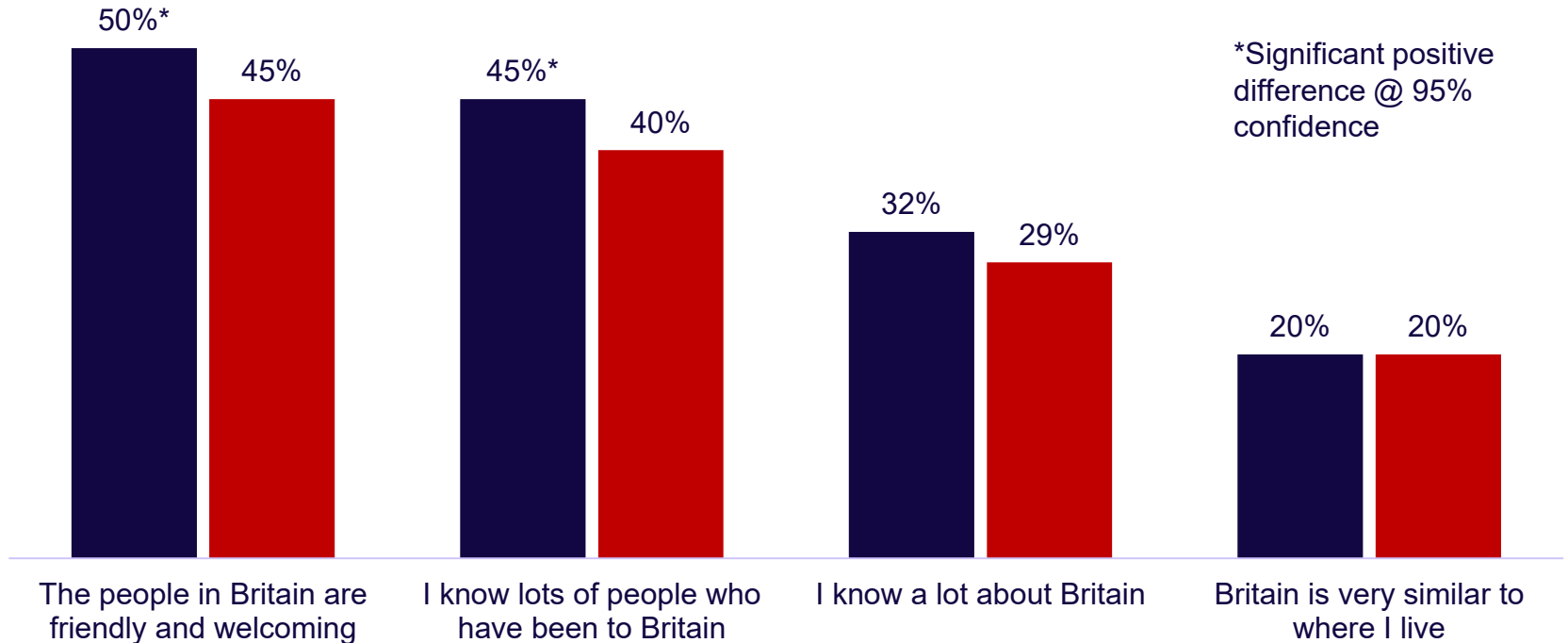
Perceptions of Britain – key points

- Californians are more likely to say they would feel welcome. They are more likely to know someone who has been to Britain before.
- Only a minority from either East or West coast say that they know a lot about Britain or that it would feel a lot like home.
- When asked unprompted about what comes to mind when they think of Britain, the Royals and bad weather are more frequently mentioned in the Tri-State area
- Californians are more likely to travel outside London, for example to Edinburgh, Scottish highlands/islands and the Cotswolds. However, convincing visitors to explore outside London is a challenge for both.
- Britain's areas of natural beauty are generally not well known by either group, but especially within the Tri-State area.
- However, it could be a driver for visiting as those who really want to visit Britain are much more likely to associate it with natural beauty.

Californians are more likely to feel safe and welcome in Britain. They are more likely to know someone who has been.

Attitudes to Britain (top 2 box)

■ California ■ Tri-State area

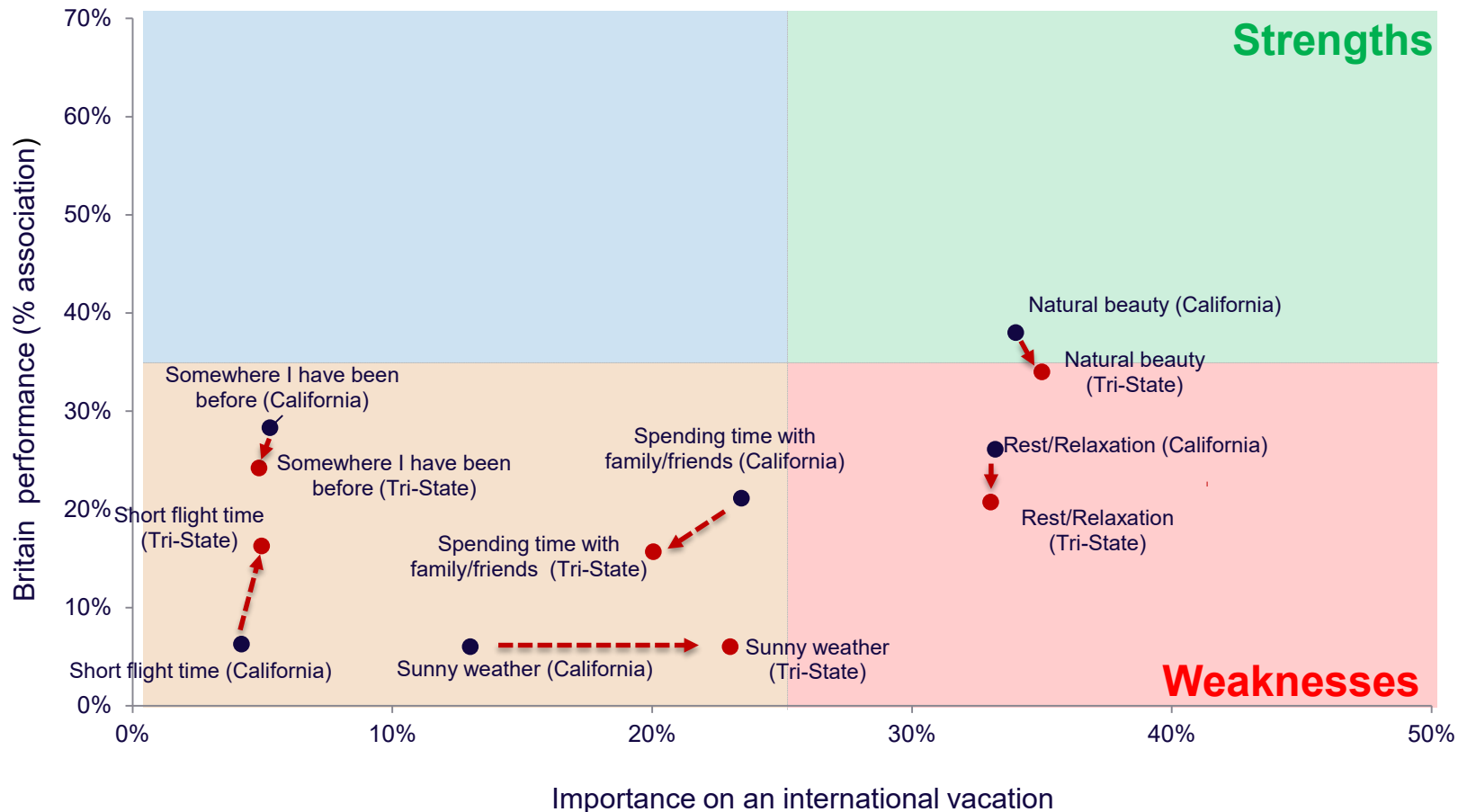


Unprompted Britain associations: the Royals and bad weather are more frequently mentioned in the Tri-State area

Britain associations	California	Tri-State area	Difference
Queen/Royals	14%	20%	+7%*
Rain/Bad weather	7%	12%	+5%*
Big Ben	13%	15%	+2%
London	17%	19%	+2%
Buckingham Palace	4%	6%	+2%*
Culture	6%	7%	+1%
Beauty	6%	4%	-2%^

*Significant positive difference @ 95% confidence
 ^Significant negative difference @ 95% confidence

Vacation drivers: differences between the coasts include sunny weather, natural beauty, relaxation, spending time with family and short flight time (only those with notable difference are shown)

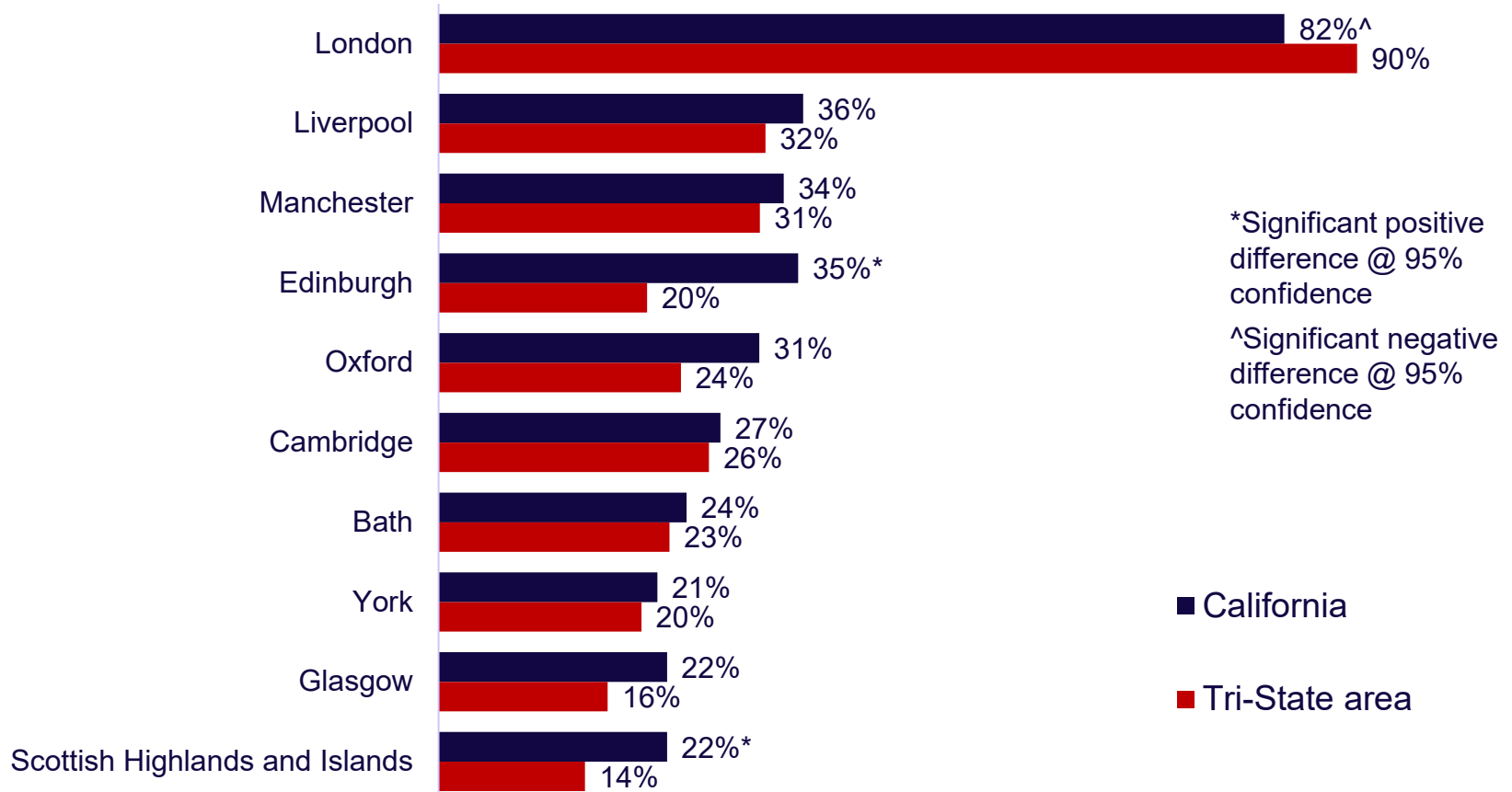


Q5 What are the most important things you look for in an international vacation?/ Q11b Which of these do you associate with an international vacation to Britain?

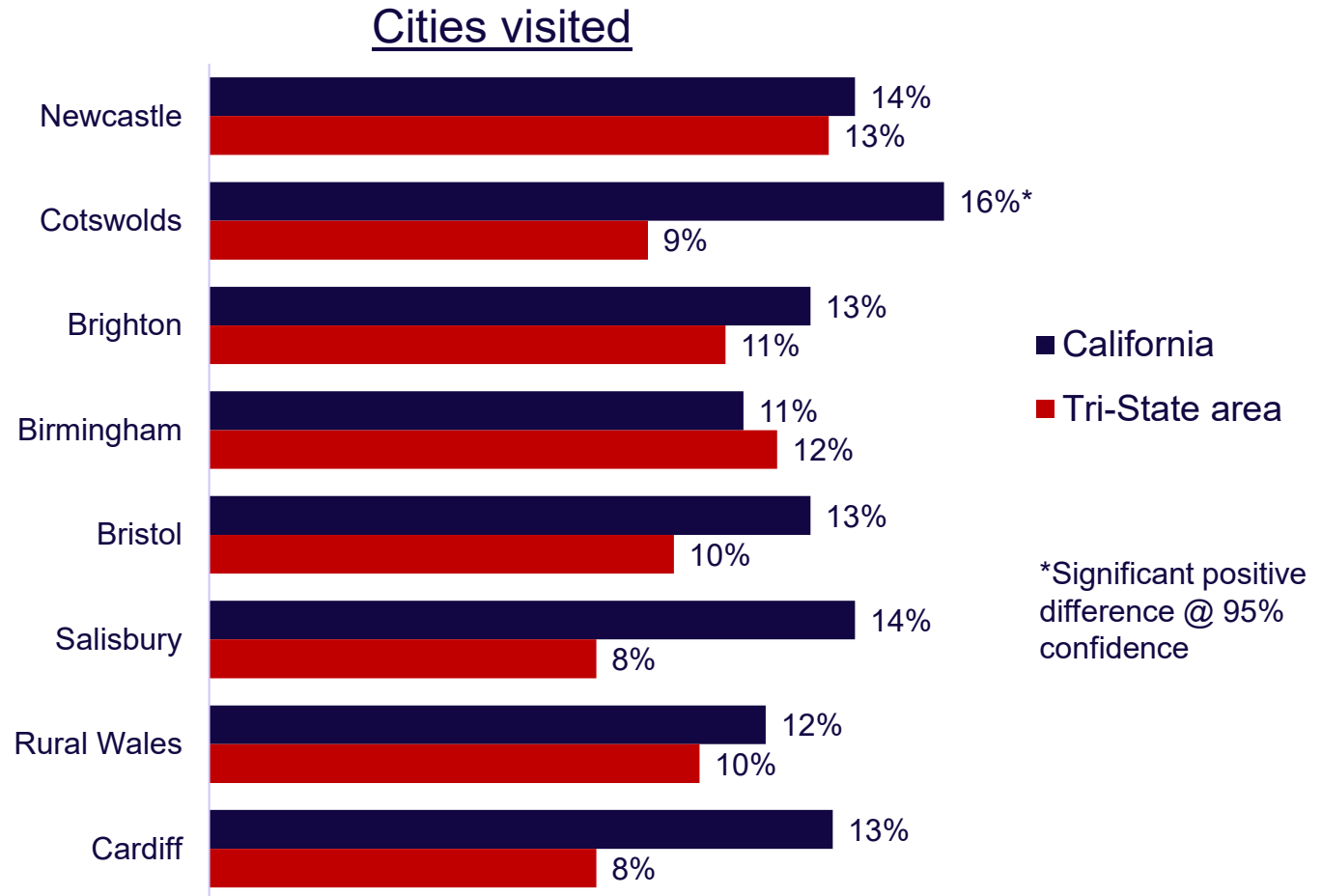
Base: California (1,003), Tri-State area (1,008)

Californians visit more places than travellers from the Tri-State area (1)

Cities visited



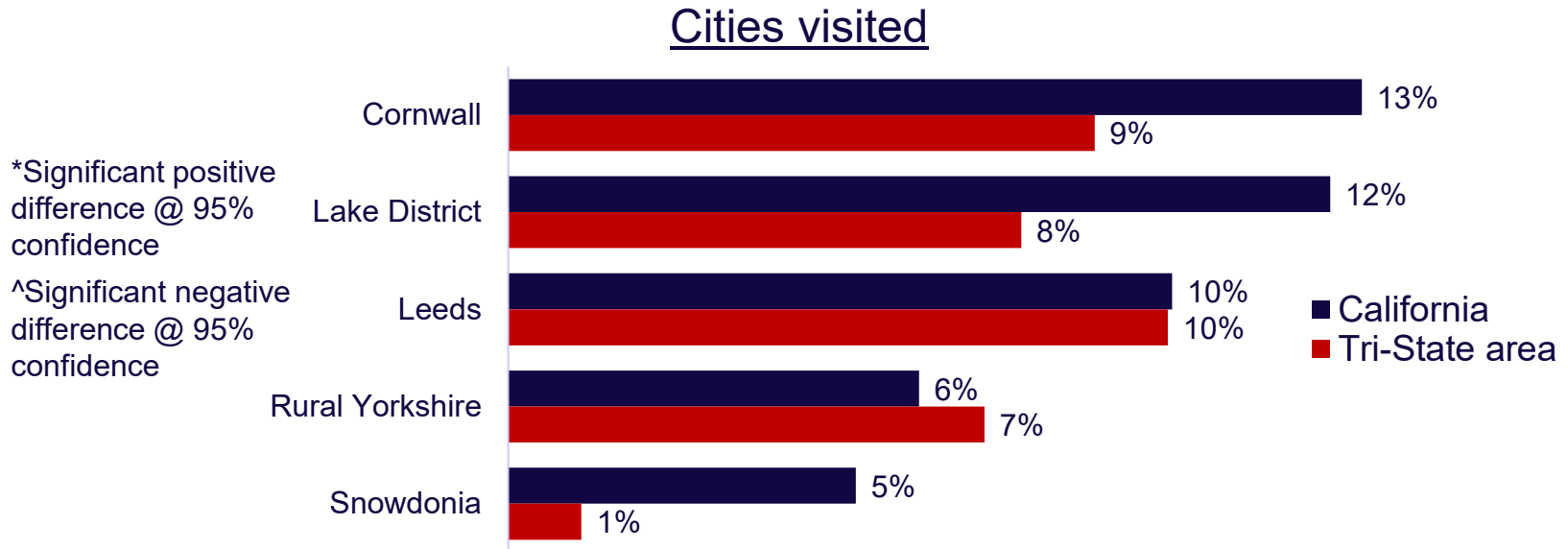
Californians visit more places than travellers from the Tri-State area (2)



Q14b Which cities/regions have you visited in Britain?

Base: All who have visited Britain; California (211), Tri-State area (182)

Californians visit more places than travellers from the Tri-State area (3)

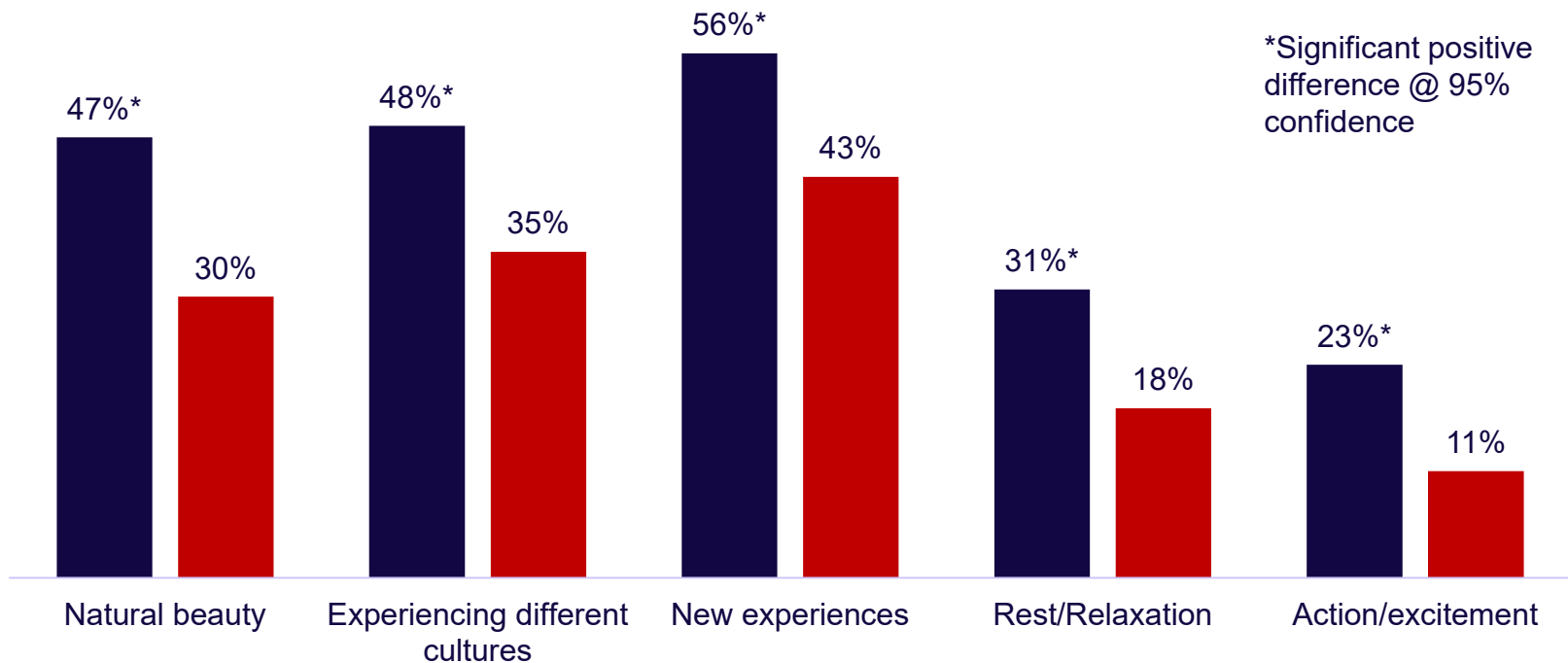


Key visit statistics	California	Tri-State
Only London	13%^	20%
London and other cities	69%	69%
Only other cities	16%*	9%
Mean number of places visited	5.1*	4.3

Those who really want to visit Britain are more likely to associate it with natural beauty

Prompted associations of Britain (ranked on difference)

■ Would really like to visit (9-10) ■ Quite interested in visiting (6-8)

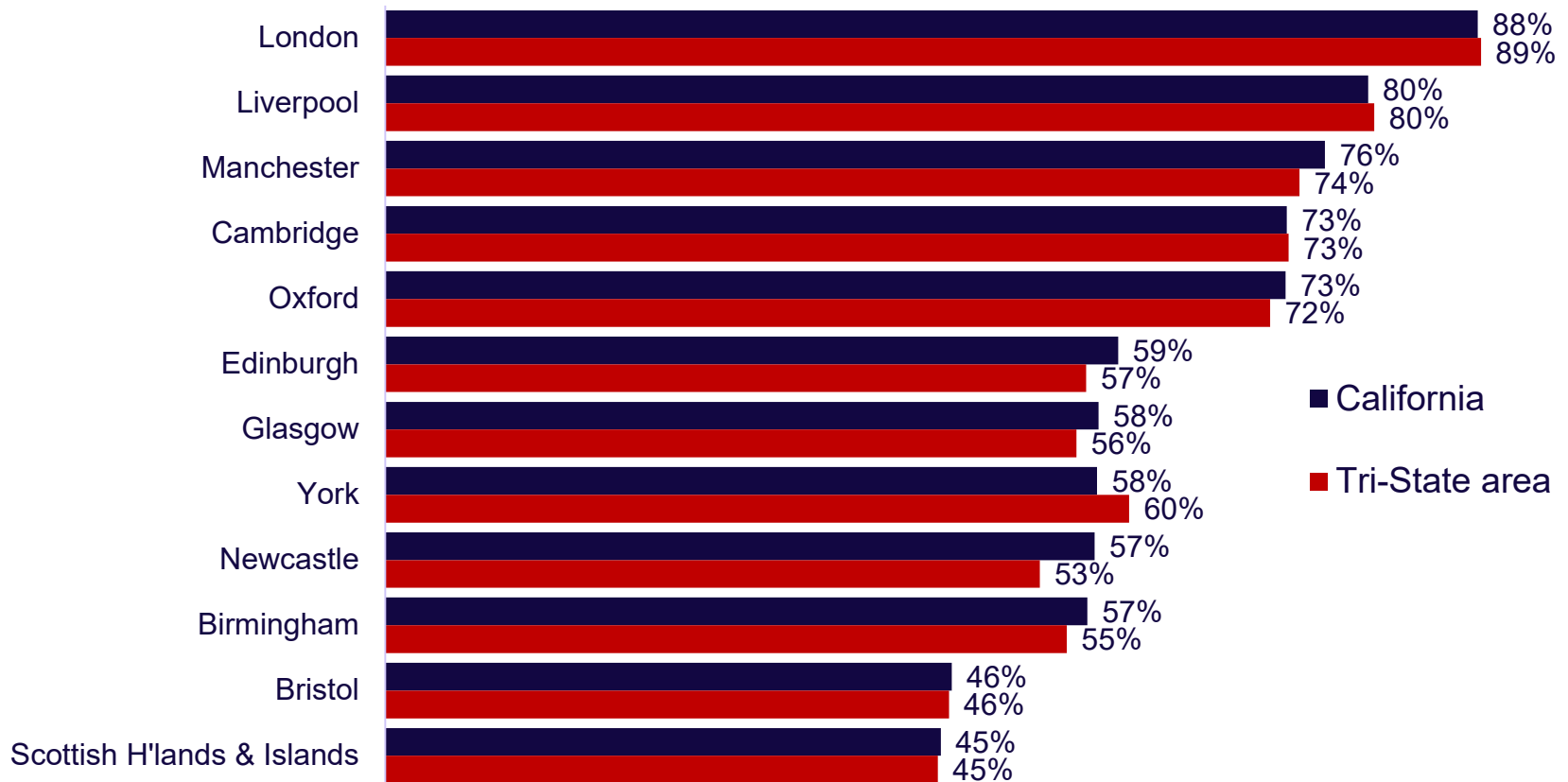


Q11b Which of these do you associate with an international vacation to Britain?

Base: Would really like to visit 9-10 (987), Quite interested in visiting 6-8 (795)

Areas of natural beauty are generally not well known, especially within the Tri-State area (1)

Prompted awareness of British cities

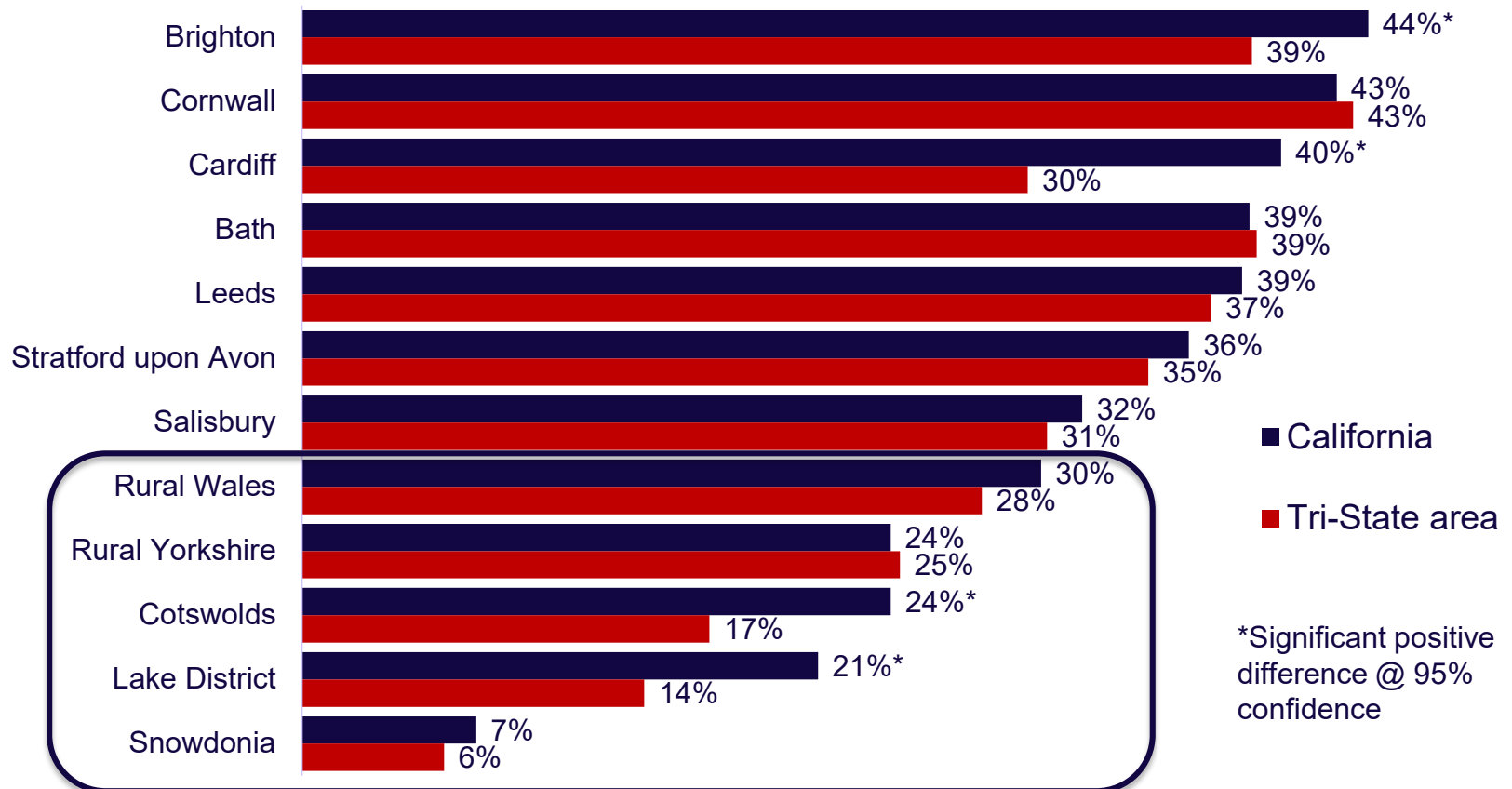


Q14a Which of these places in Britain have you heard of?

Base: California (1,003), Tri-State area (1,008)

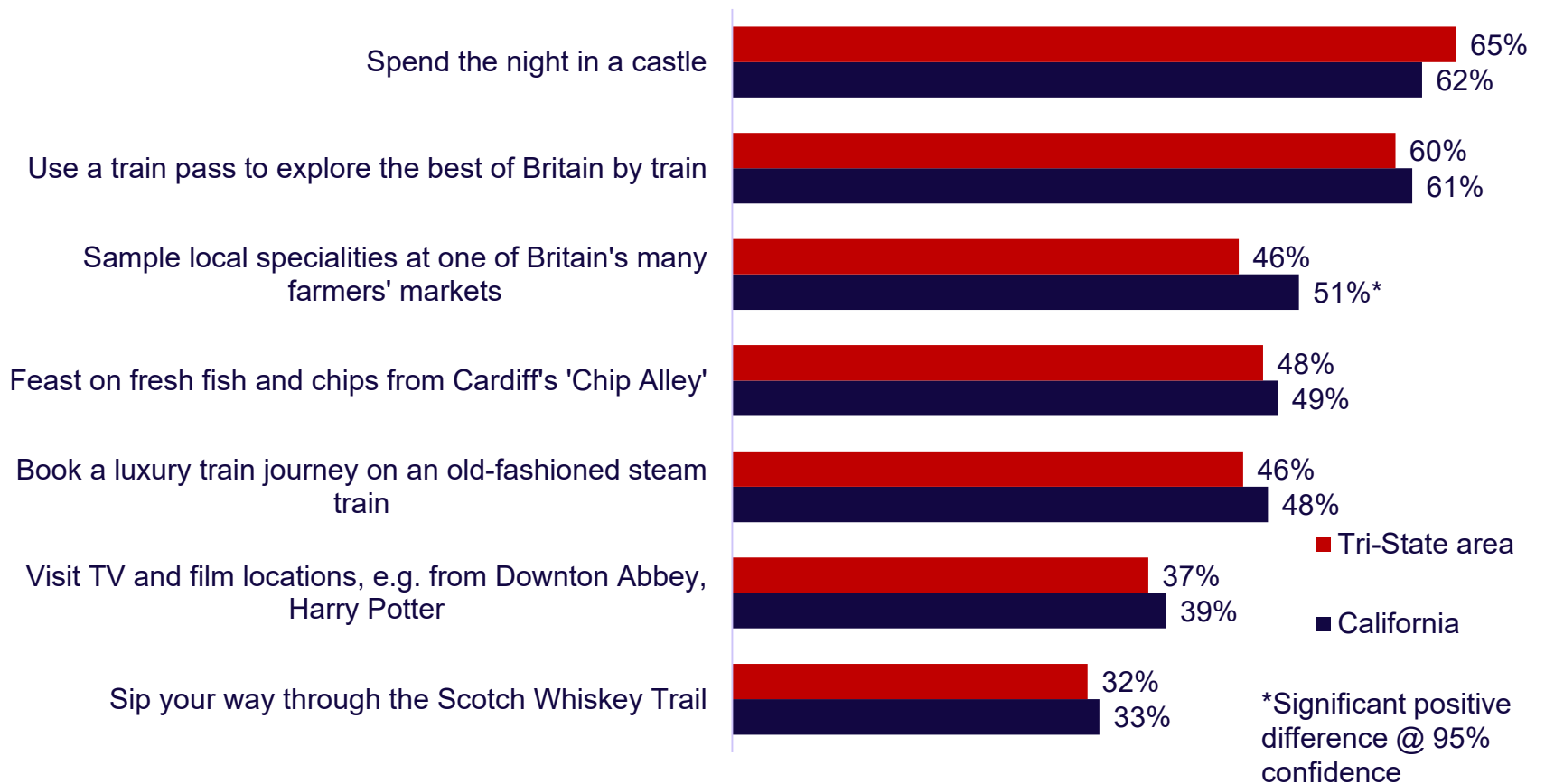
Areas of natural beauty are generally not well known, especially within the Tri-State area (2)

Prompted awareness of British cities



Spending the night in a castle and exploring Britain by train are the most attractive experiences. Travellers in the Tri-State area are more likely to say farmers markets are appealing (1)

Activity Appeal

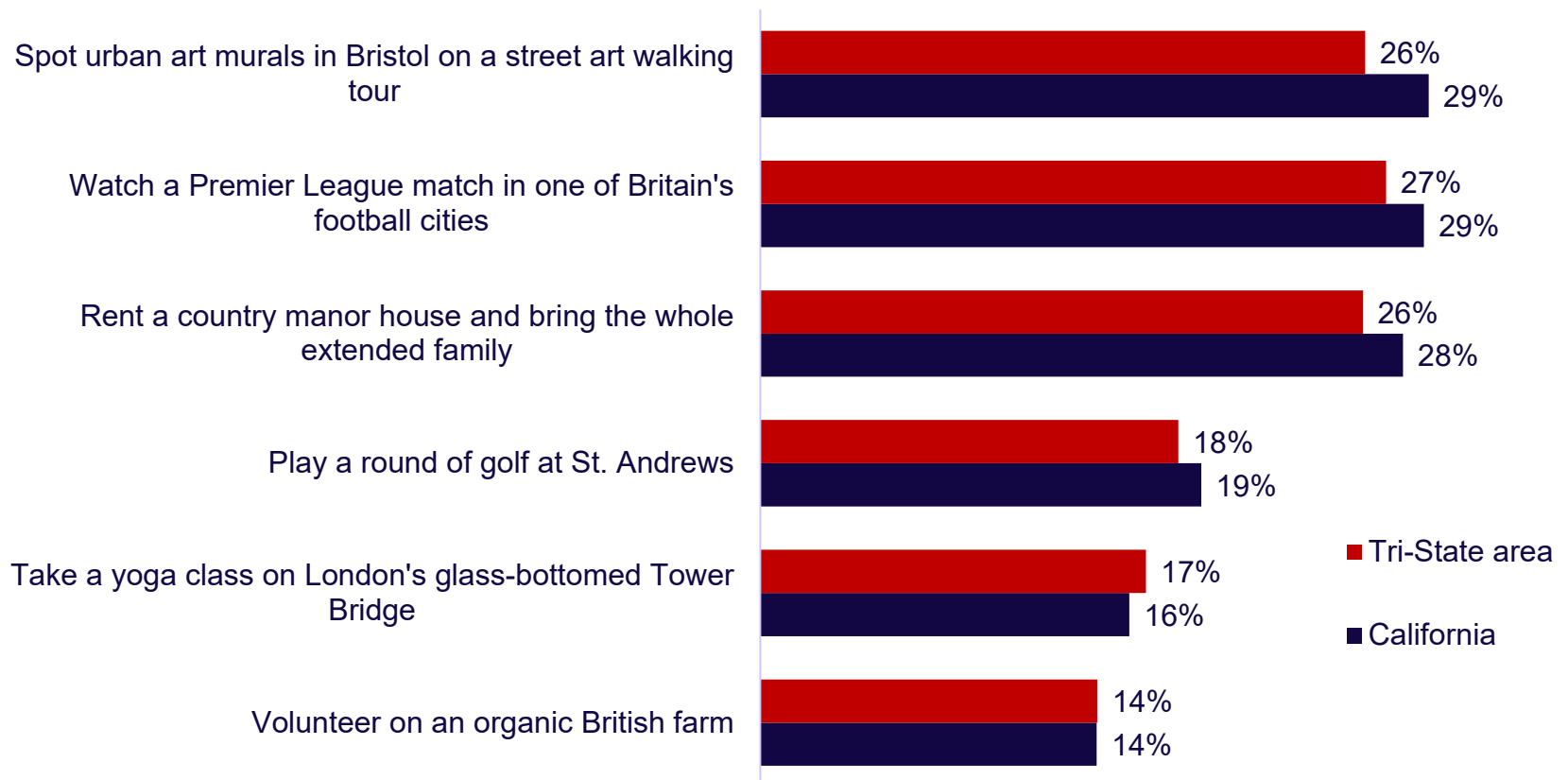


Q13c Here are some experiences you can have in Britain. Which of these appeal to you?

Base: California (1,003), Tri-State area (1,008)

Spending the night in a castle and exploring Britain by train are the most attractive experiences. Travellers in the Tri-State area are more likely to say farmers markets are appealing (2)

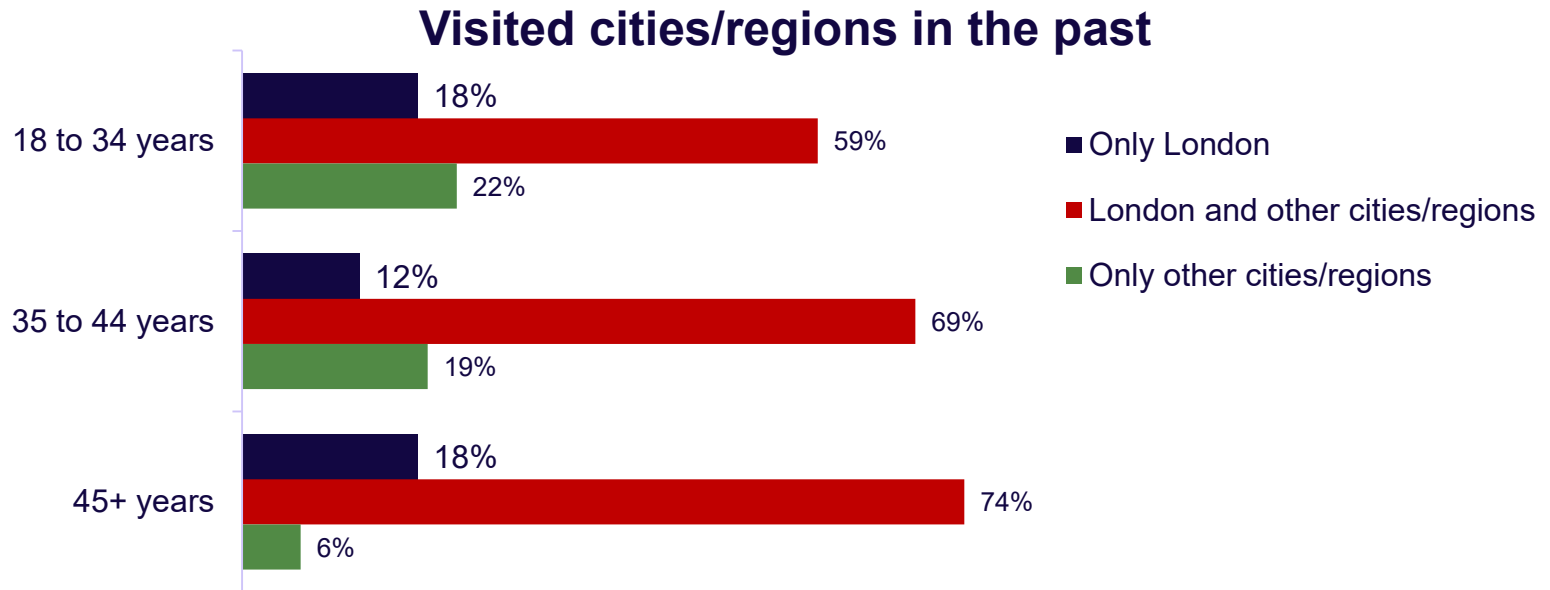
Activity Appeal



Q13c Here are some experiences you can have in Britain. Which of these appeal to you?

Base: California (1,003), Tri-State area (1,008)

Perceptions of Britain, by age (1)



34% of travellers aged 18 to 34 know a lot about Britain

38% of travellers aged 35 to 44 know a lot about Britain

25% of travellers aged 45+ know a lot about Britain

Perceptions of Britain, by age (2)

Top 5 prompted associations 18-34 years

New experiences (49%)

Visiting famous landmarks (48%)

Local food and drink (42%)

Natural beauty (39%)

Experiencing different cultures (36%)

Top 5 prompted associations 35-44 years

Visiting famous landmarks (54%)

Local food and drink (47%)

New experiences (46%)

Experiencing different cultures (39%)

A mixture of things to do (37%)

Top 5 prompted associations 45+ years

Visiting famous landmarks (80%)

A mixture of things to do (60%)

Local food and drink (55%)

New experiences (49%)

Easy to get around (47%)

Perceptions of Britain, by age (3)

Top 5 prompted awareness cities 18-34 years

London (81%)

Liverpool (69%)

Manchester (66%)

Cambridge (60%)

Oxford (58%)



Top 3 appealing experiences 18-34 years*

Spend the night in a castle

Use a train pass to explore the best of Britain by train

Visit TV and film locations, for example from The Crown, Downton Abbey, Harry Potter and James Bond

Top 5 prompted awareness cities 35-44 years

London (81%)

Liverpool (71%)

Manchester (69%)

Oxford (64%)

Cambridge (63%)

Top 3 appealing experiences 35-44 years

Spend the night in a castle

Use a train pass to explore the best of Britain by train

Sample local specialities at one of Britain's many farmers' markets

Top 5 prompted awareness cities 45+ years

London (96%)

Liverpool (90%)

Cambridge (85%)

Oxford (84%)

Manchester (83%)

Top 3 appealing experiences 45+ years

Use a train pass to explore the best of Britain by train

Spend the night in a castle

Feast on fresh fish and chips from Cardiff's 'Chip Alley'

5. Appendix

Accessible version of slide 52 (1)

Somewhere I have been before	Britain performance (association)	Importance on an international holiday
California	28%	5%
Tri-State	24%	5%

Short flight time	Britain performance (% association)	Importance on an international holiday
California	6%	4%
Tri-State	16%	5%

Spending time with family and friends	Britain performance (% association)	Importance on an international holiday
California	21%	23%
Tri-State	16%	20%

Accessible version of slide 52 (2)

Rest / Relaxation	Britain performance (association)	Importance on an international holiday
California	26%	33%
Tri-State	21%	33%

Natural beauty	Britain performance (% association)	Importance on an international holiday
California	38%	34%
Tri-State	34%	35%

Sunny weather	Britain performance (% association)	Importance on an international holiday
California	6%	13%
Tri-State	6%	23%

US East vs West Coast Consumer Research

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