Market and Trade Profile: USA

February 2022

Overview

- **'Chapter 1: Inbound market statistics'** provides insights on key statistics about American travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.
- **'Chapter 2: Experiences and perceptions'** features details about what visitors from America are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by Americans in general are also highlighted.
- **'Chapter 3: Understanding the market'** takes a close look at consumer trends in America, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach American consumers are indicated, too.
- **'Chapter 4: Access and travel trade'** shows how people from America travel to the UK, how to best cater for their needs and wants during their stay, and gives insights into the American travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out in the appendix.

Please note that most of this report refers to the market conditions for travel from the US to the UK prior to the COVID-19 pandemic and gives some insight on changes which have resulted from the crisis. An international recovery sentiment tracking survey is available here: visitbritain.org/inbound-covid-19-sentiment-tracker.

Contents

VisitBritain VisitEngland

Executive Summary

1: Inbound market statistics

Chapter summary

- Despite the general slowdown in 2020 due to the COVID-19 outbreak, the American outbound market is forecast to reach almost 177 million overnight trips abroad by 2029. Americans took more outbound overnight trips in 2019 than any other country in the world with 128 million trips and ranked globally in 2nd place for international tourism expenditure, only behind Chinese travellers, with US$134.6bn in 2019.
- The USA was the largest inbound source market for the UK for volume and for value in 2019, with 4.5m visits and £4.18bn spent by American residents in the UK in 2019.
- 49% of all visits to the UK were for holidays in 2019, followed by visiting friends and relatives (23%) and business (18%).
- London is the leading destination for a trip to the UK, based on the number of nights, but Scotland and the South East of England are also popular.
- Almost 3 in 4 (72%) from the US to the UK are repeat visits, with 59% of holiday visits being from those who have visited the UK before (2015).

#1 Source Market for UK in 2019:
4.5m visits and £4.18 bn spent

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO. Market-level inbound statistics were not produced for full-year 2020; see p. 10 for more.

2: Experiences and perceptions

Chapter summary

- Dining in restaurants, sightseeing famous monuments/buildings and shopping feature highest on the list of most American's visits in the UK. Going to the pub and socialising with British locals is also a key activity.
- Culture and history are strong pulls to the UK. Americans have a higher than average propensity to visit museums and art galleries and over 4-in-10 visit historic houses and castles.
- Americans have a strong feeling of welcome when they visit the UK and are highly likely to recommend. 88% of departing American visitors are either 'very' or 'extremely' likely to recommend the UK for a holiday or short break*.
- Visitors from the US are positive about the UK. In 2021 the UK was ranked 5th among 60 nations by Americans for its overall image based on six dimensions (Tourism, Culture, People, Exports, Governance, Immigration & Investment).
- Americans rated the UK highly for vibrant cities, contemporary culture, sports and welcome, but less so for its natural beauty.
- When asked for reasons to return to the UK on a holiday visiting a different part of the country, experiencing a new activity or see new sights and attractions were the main pulls in tempting a return.

Source: International Passenger Survey by ONS, (2017; *all visits, excluding UK nationals and nil-night visits), Anholt Nation Brands Index powered by Ipsos 2021

Cultural attractions #1 motivation for visiting Britain on a holiday for Americans.

VisitBritain VisitEngland

3: Understanding the market

Chapter summary

- The US is 3rd most populated country in the world, behind China and India.
- Over the past decade the number of valid American passports in circulation has increased 4% with 44% of the population having one in 2019.
- The outbound travel market has been growing in the past decade boosted by economic growth, consumer confidence as well as the strong dollar.
- COVID-19 significantly impacted outbound travel in 2020-2021 but recent VB Research demonstrates the pent up demand for returning to international travel with 80% of Americans considering taking an international leisure trip in the next 12 months.
- Americans tend to start thinking about their trip early with 60% doing so as early as half a year or more in advance. One third book 3 to 6 months in advance whilst one quarter book within one month before arrival.
- They are also keen to book holiday activities before they start their journey and are more likely to book direct with the transport or accommodation provider compared to the market average.
- More than half of Americans state that they will think more about sustainability and the environmental impact when planning a future holiday. The youngest age groups (under 45 in particular) show the strongest intention to change their behaviour.

Source: CIA World Factbook 2021, travel.state.gov, Oxford Economics, VisitBritain/IPSOS 2016,

44%
of the American population own a valid passport in 2019

VisitBritain VisitEngland

4: Access and travel trade

Chapter summary

- Airline capacity is very important to the UK with regards to US tourism as 87% of American visits to the UK were made by plane in 2019.
- Annual airline seat capacity from USA to the UK has seen a sustained period of growth from 2010, peaking at 2018 and remaining roughly stable into 2019.
- Following the impact of COVID-19, seat capacity has followed a slow and steady path towards recovery, with annual seat capacity for 2021 running around 25% of the pre-pandemic levels of 2019.
- 36 airports in the USA were connected to the UK via direct flights in 2019 with an average weekly capacity of over 257,000 seats. The COVID-19 pandemic caused a sharp decline of 70% in 2020 however and recovery into 2021 is slow but steady. Significant improvements are expected into Q4 2021 following UK border restriction easing for US international travellers in late summer 2021.
- In 2019 a large number of airlines operated flights from US to the UK with the two largest carriers representing over half the direct seats to the UK. British Airways (35%) followed by Virgin Atlantic Airlines (19%).
- The travel trade structure in the US is made up of tour operators, online travel agents (OTAs) and front-line retail travel agents.

Source: Apex 2019 - 2021

>257,000

weekly average direct airline seat capacity from USA to the UK in 2019

VisitBritain VisitEngland

Inbound market statistics

Chapter 1

1.1 Key statistics

Key insights

- The USA is the UK's largest source market in terms of visits and the most valuable for visitor spending. 4.5 million Americans visited the UK in 2019, representing over 1 in every 10 international arrivals. The US accounted for 15% of spend by international visitors spending £4.18 billion in 2019, an increase of 4% year on year.
- Long term trends show that visits have increased 65% between 2009 and 2019, and spend has more than doubled across the last 10 years (+103%). Nights have grown to a lesser extent, up 29% over the same time period.
- Holiday visits continue to lead in terms of volume of visits from the US market accounting for 2.2 million holidays in 2019, a new record. 49% of all visits to the UK from the USA were made for holiday purposes, followed by 23% for visits to friends and/or relatives. Business visits have dipped 9% since the peak recorded in 2018.
- London is the leading destination for a trip to the UK, based on the number of nights, but Scotland and the South East of England are also popular.
- Two forms of accommodation dominate in terms of accommodation use with 49% of nights spent in a hotel or a guest house and 30% of nights spent for free with VFR. Almost 6 out of 10 American holiday visitors make a repeat visit to Britain.*

The USA is the UK's largest source market by volume of visits and spend (2019)

Source: International Passenger Survey (IPS) by ONS, Oxford Economics; *excluding UK nationals, based on 2015 IPS data. Please note that market-level inbound statistics have not been produced by the ONS for full-year 2020 as the IPS was suspended from mid-March; latest full-year inbound data is for 2019. More information is available here.

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2019
International tourism expenditure (US$bn)	134.6
Global rank for international tourism expenditure	2
Number of outbound overnight visits (m)	127.5
Most visited destination - globally	Mexico
Most visited European destination	France

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10-year trend	+65%	+29%	+103%
2009	2,727	22,558	2,063
2010	2,640	22,142	2,077
2011	2,884	23,755	2,408
2012	2,763	22,941	2,381
2013	2,750	21,724	2,509
2014	2,977	27,840	2,946
2015	3,538	29,330	3,297
2016	3,954	32,262	3,885
2017	4,631	36,497	4,349
2018	4,571	35,097	4,025
2019	4,499	29,100	4,184
Share of UK total in 2019	**11.0%**	**10.0%**	**14.7%**

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics

1.1 Key statistics: volume and value

Inbound volume and value

Measure	2019	Change vs. 2018	Rank out of UK top markets
Visits (000s)	4,499	-2%	1
Nights (000s)	29,100	-17%	1
Spend (£m)	4,184	+4%	1

Between January and March 2020, the UK welcomed 693,000 visits from the US (down 10% on the first quarter of 2019), worth £551 million (down 19% on the first quarter of 2019). The COVID-19 pandemic already mildly impacted visitation from the US to the UK in the first quarter of 2020 as the US introduced a ban on UK inbound travellers to counter the spread of COVID-19 in early March 2020, while the UK applied restrictions on US arrivals in July 2020.

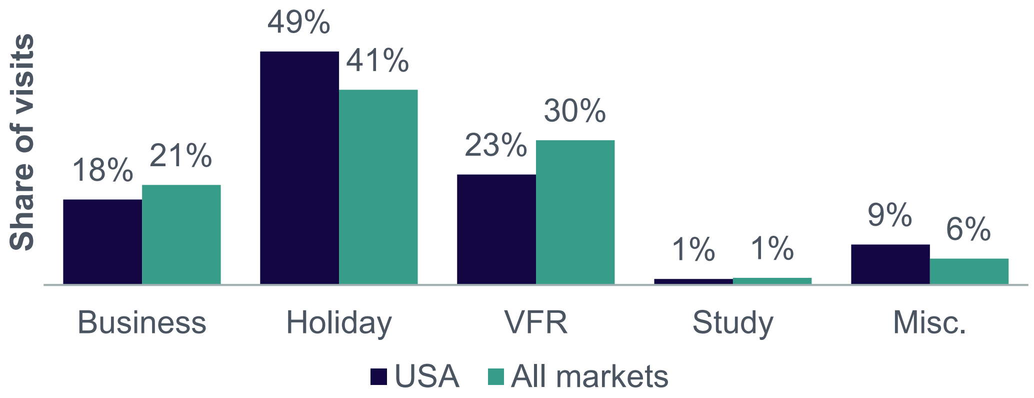
Source: International Passenger Survey by ONS

Key metrics by journey purpose

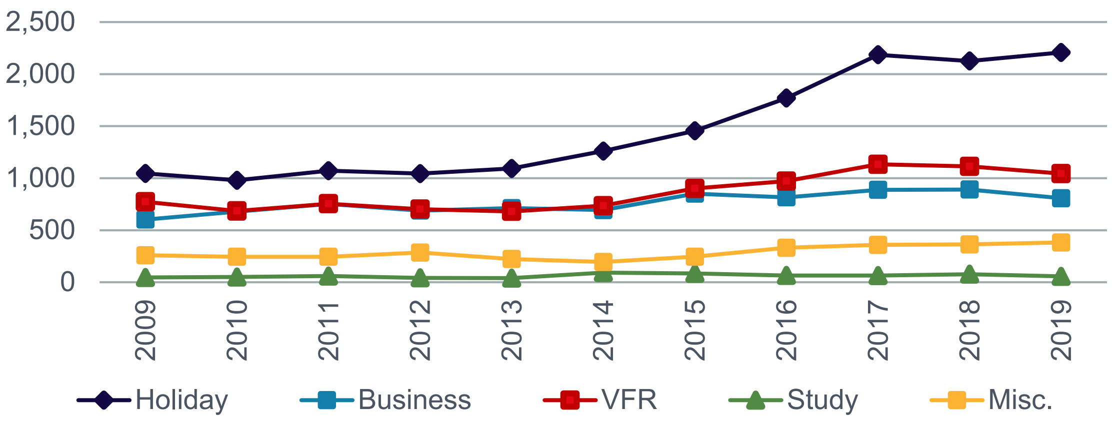
Averages by journey purpose in 2019	Nights per visit	Spend per night	Spend per visit
Holiday	6	£156	£996
Business	5	£269	£1,312
Visiting Friends/ Relatives	9	£72	£628
Study	20	£95	£1,949
Misc.	2	£176	£387
All visits	6	£144	£930

1.1 Key statistics: journey purpose

Journey purpose 2019



Journey purpose trends (visits 000s)



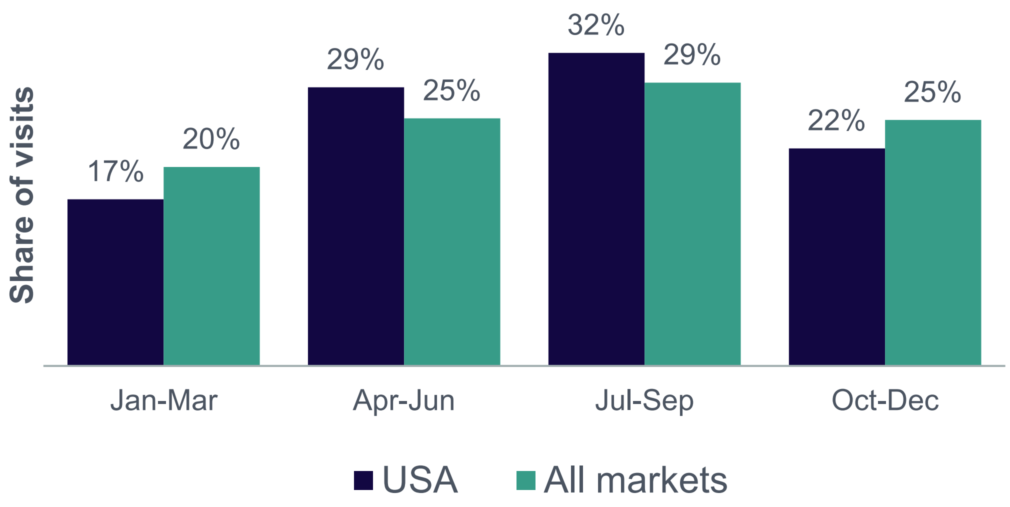
- 49% of all visits to the UK from the USA were made for holiday purposes, followed by 23% primarily for visiting friends and/or relatives in 2019.
- A record 2.2 million US holiday visits were made in 2019, spending a record £2.2 billion and accounting for 53% of overall US visitor spend.
- Business visits account for almost 1 in 5 US trips to the UK, lower than the all market average.
- Business visitors and those coming to visit friends or relatives who live in the UK are more likely to be repeat visitors* (87% and 84% respectively).*

- Holiday visits continue to lead in terms of volume of visits from the US market accounting for 2.2 million holidays from the USA in 2019, a new record. This journey purpose has shown strong growth since 2013.
- VFR trips have been above the 1m mark since 2017, but dipped slightly in the last two years.
- Business trips accounted for a record 891,000 visits in 2018 and 808,000 visits in 2019.
- Misc visits have been steadily growing, reaching a record 382,000 in 2019.

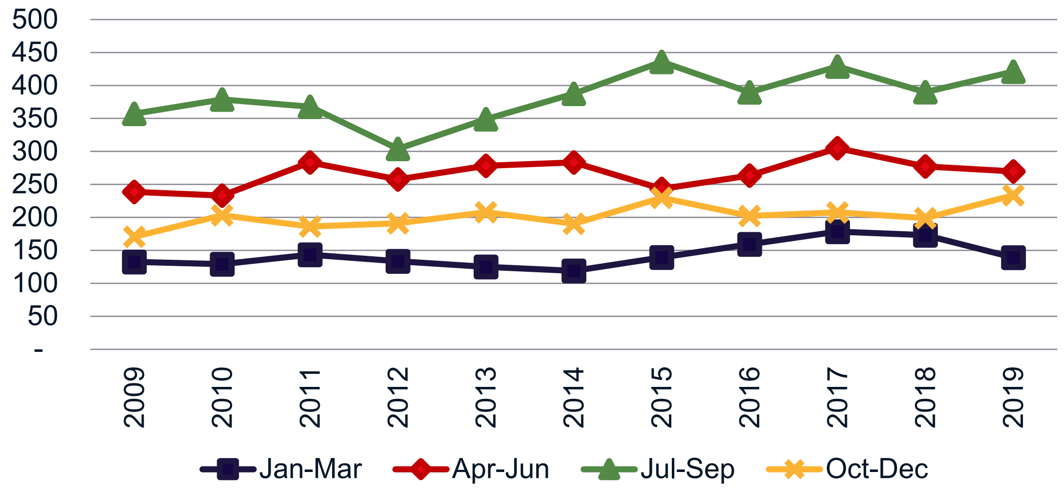
Source: International Passenger Survey by ONS, *2015, excluding British nationals

1.1 Key statistics: seasonality

Seasonality 2019



Seasonality trend (visits 000s)



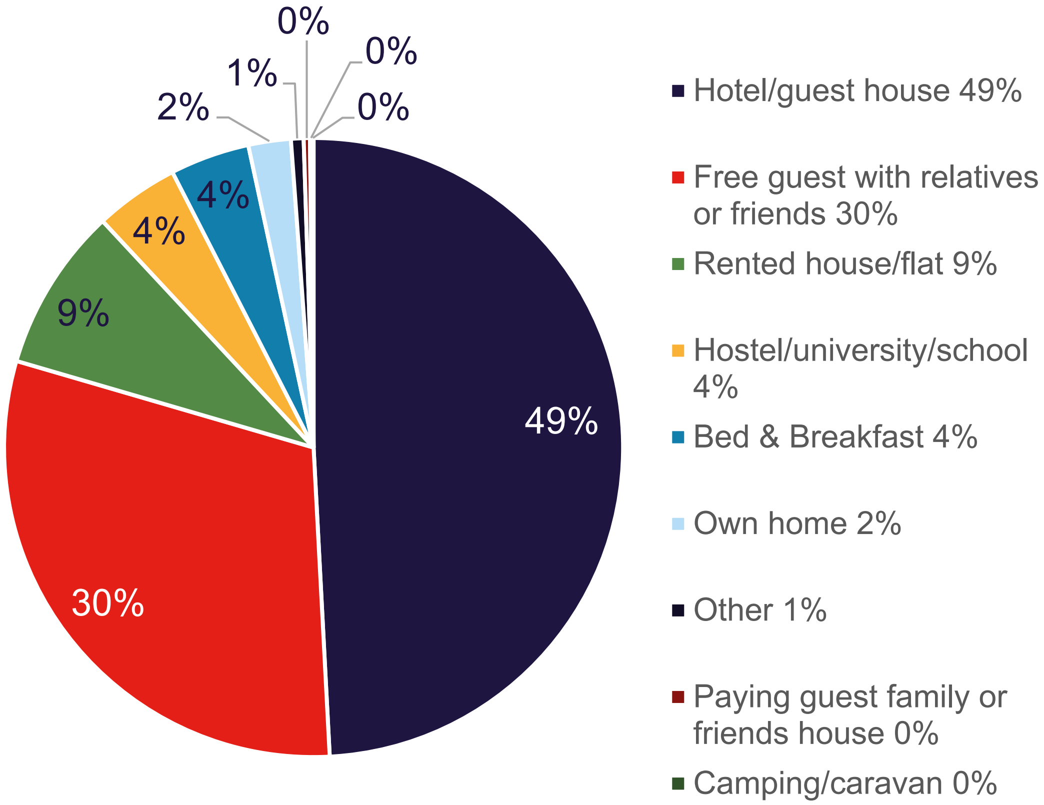
- In 2019, the summer quarter of July to September returns to the most important season of the year for travel to the UK, with 1 in 3 visits arriving across that time. The spring season of April to June is also a popular time for Americans to travel compared to the average inbound traveller (29% vs 25%).
- Americans visit the UK less often in the low seasons compared to the average international visitor, with 22% vs 1 in 4 international arrivals on average in Q4. However Q4 2019 saw a record number of visits, reaching the 1m mark.
- The volume in the third quarter has recovered more strongly than the other quarters since the decline immediately following the financial crisis. In Q3 there were 1.44m visits, just below the peak of 1.28m in 2006.

Source: International Passenger Survey by ONS

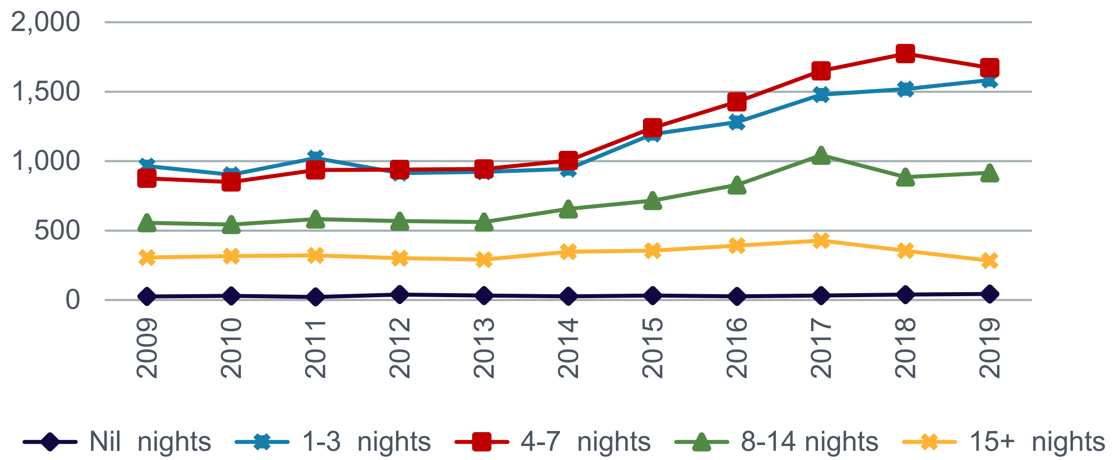
VisitBritain VisitEngland

1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2019 (nights, %share)



Duration of stay trend (visits 000s)

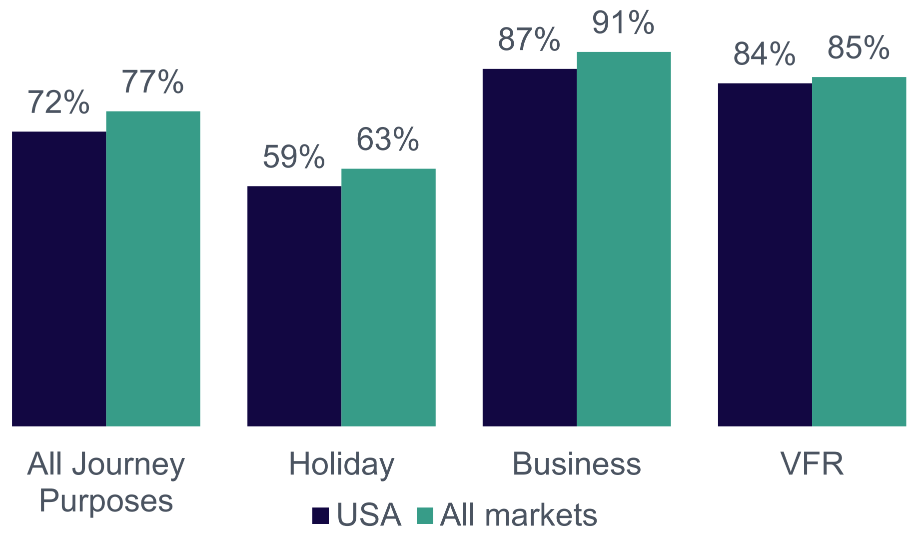


- American visitors spent on average 6 nights per visit in the UK in 2019, slightly lower than the global average (7).
- The most common length of stay for US travellers in the UK was 4-7 nights, closely followed by short trips of 1-3 nights, the latter of which reached a record 1.6m visits in 2019.
- Longer stays of 8-14+ nights have been decreasing over the last 2 years, down -12% in 2019 vs 2017.
- Two forms of accommodation dominate the landscape when it comes to overnight stays, with 49% of nights spent in a hotel or a guest house and 30% of nights spent for free in the house of relatives or friends. Rented house or flat represents almost 1 in 10 nights in the UK for US visitors.

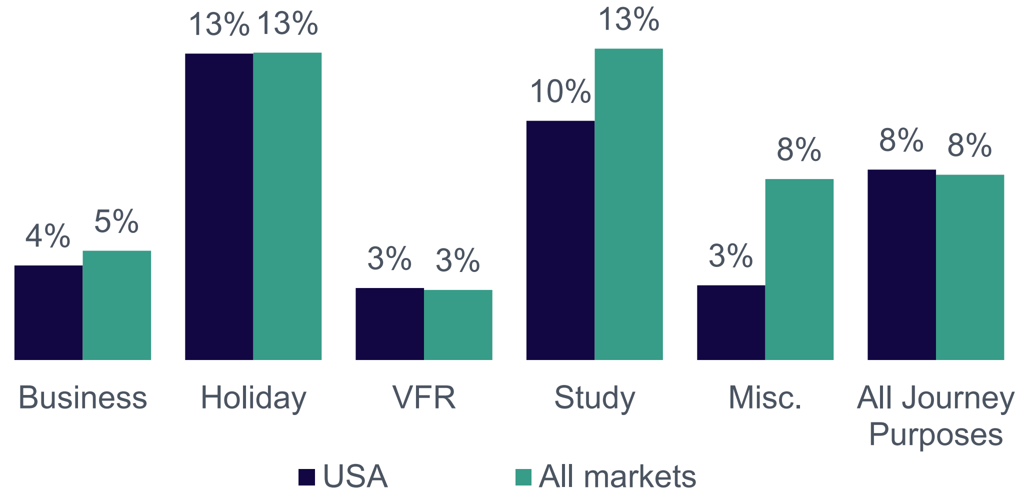
Source: International Passenger Survey by ONS

1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK who have been to the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour in 2017-2019**



- 59% of holiday visits from the US to the UK were made by repeat visitors (excl. UK nationals). These repeat visitors came on average between 4 and 5 times (4.2 times, a slightly below average visit frequency compared to other markets) and spent £3,651 in the UK in total in the past ten years. The highest proportion of repeat visitors were among those coming for business purposes (87%) or to visit friends or relatives who live in the UK (84%) on average.
- Looking at the average from 2017-2019, US visits bought as part of a package holiday/tour were on par with the global average (8%). 13% of US holiday visits to the UK were bought as package holiday, followed by 10% for study visits. Very few business and VFR visits were bought as part of a package.

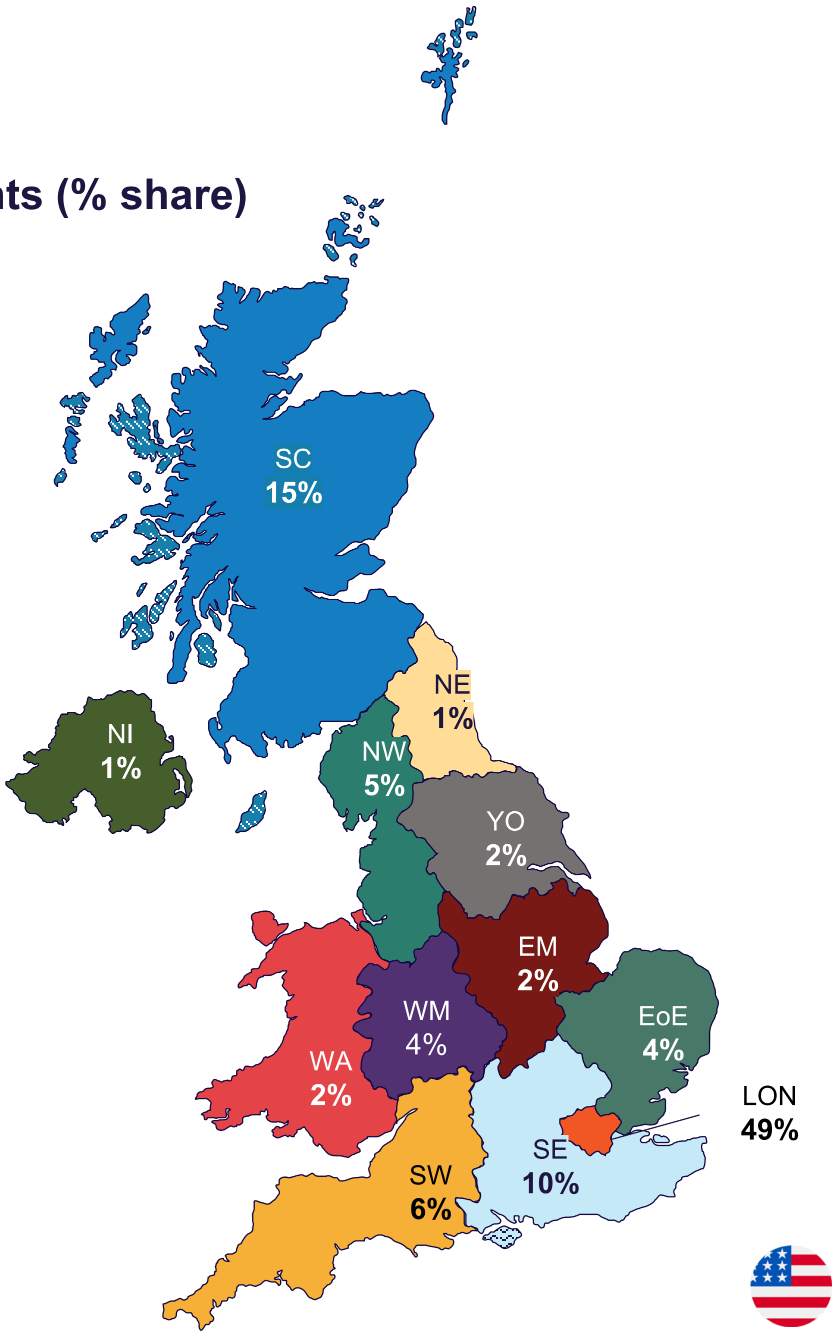
International Passenger Survey by ONS. *2015, excluding British nationals;
**See definition of a package holiday in appendix

1.2 Getting around Britain

Annual visits to the UK (2019)

Region	Nights stayed (000)	Visits (000)	Spend (£m)
Total	**28,908**	**5,640**	**4,162**
Scotland (SC)	4,246	636	717
Wales (WA)	639	121	54
Northern Ireland (NI)	146	28	20
London (LDN)	14,362	3,088	2,455
North East (NE)	282	48	28
North West (NW)	1,374	282	157
Yorkshire (YO)	628	105	53
West Midlands (WM)	1,102	157	76
East Midlands (EM)	439	84	38
East of England (EoE)	1,159	200	117
South West (SW)	1,668	272	171
South East (SE)	2,863	576	273
Nil nights (Nil)	N/A	43	3

Nights (% share)



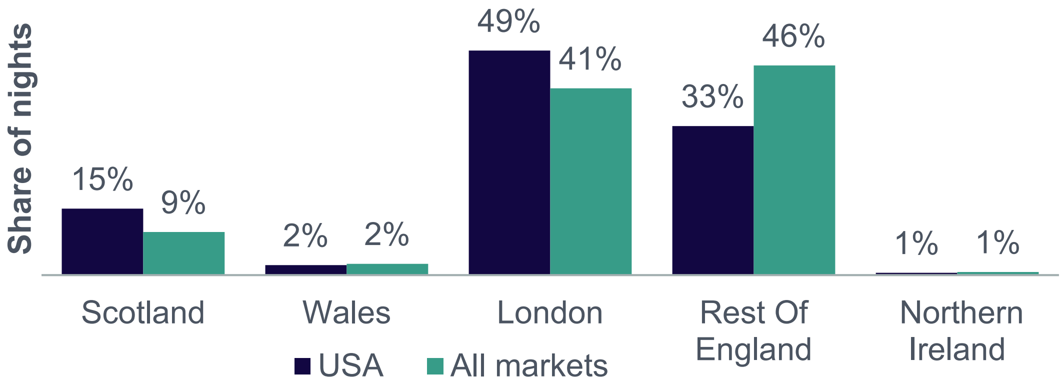
Source: International Passenger Survey by ONS

1.2 Getting around Britain: regional spread and top towns/cities

Top towns and cities visited (2019)

Town	Visits (000s)
London	3,088
Edinburgh	461
Glasgow	145
Manchester	118
Bath	80

Regional spread 2019

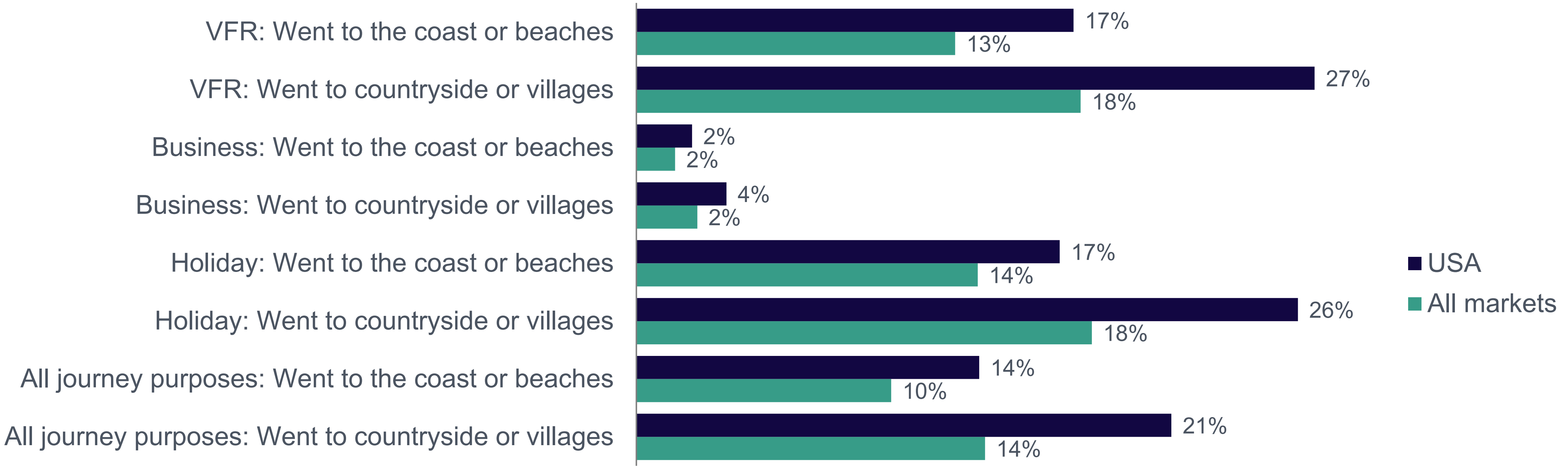


Source: International Passenger Survey by ONS

- London is the leading destination for a trip to Britain, accounting for 49% of visitor nights. Rest of England accounts for 33% of nights to the UK whilst Scotland and Wales account for 15% and 2% of nights, respectively.
- The US is the top market for inbound travellers to Scotland, which is very popular amongst Americans. 15% of nights were spent in Scotland, compared to a global average of 9% of all international nights spent in the UK.
- London also welcomes the most visitors from the US with 49% of nights spent in the capital. Outside London, the South East is also popular amongst Americans (more information can be found on the previous page).
- American visitors have a lower propensity to visit other areas of England outside of London, respresenting significantly lower number of nights when compared to the global average (33% vs 41%).
- Nights spent in Wales and Northern Ireland are in line with the global average (2% and 1% respectively).
- Out of the top 5 towns and cities visited by Americans, the US is the biggest inbound market for visits to London, Edinburgh, Glasgow and Bath.

1.2 Getting around Britain: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

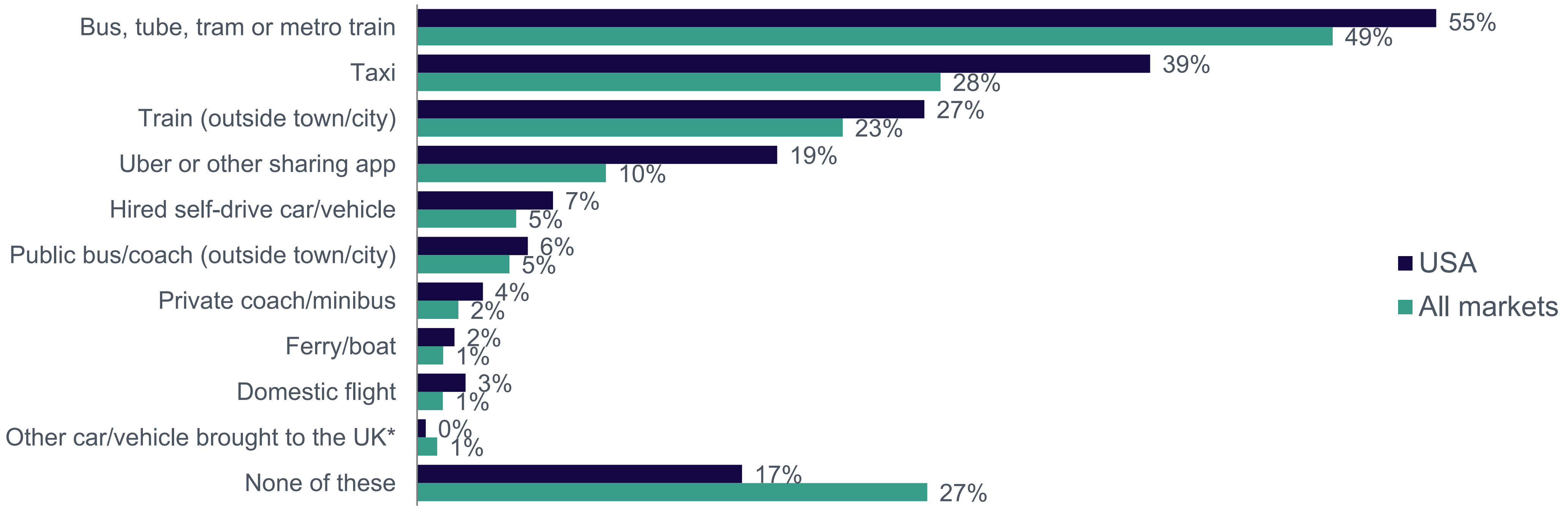


- Visitors from the USA have an above average propensity to feature trips to rural and coastal areas of Britain.
- 1 in 5 visit the countryside or villages (vs 14% global average), whilst 14% visit the coast or beach (vs 10% global average).

Source: International Passenger Survey by ONS 2016

1.2 Getting around Britain: use of internal modes of transport

Propensity to use internal modes of transport

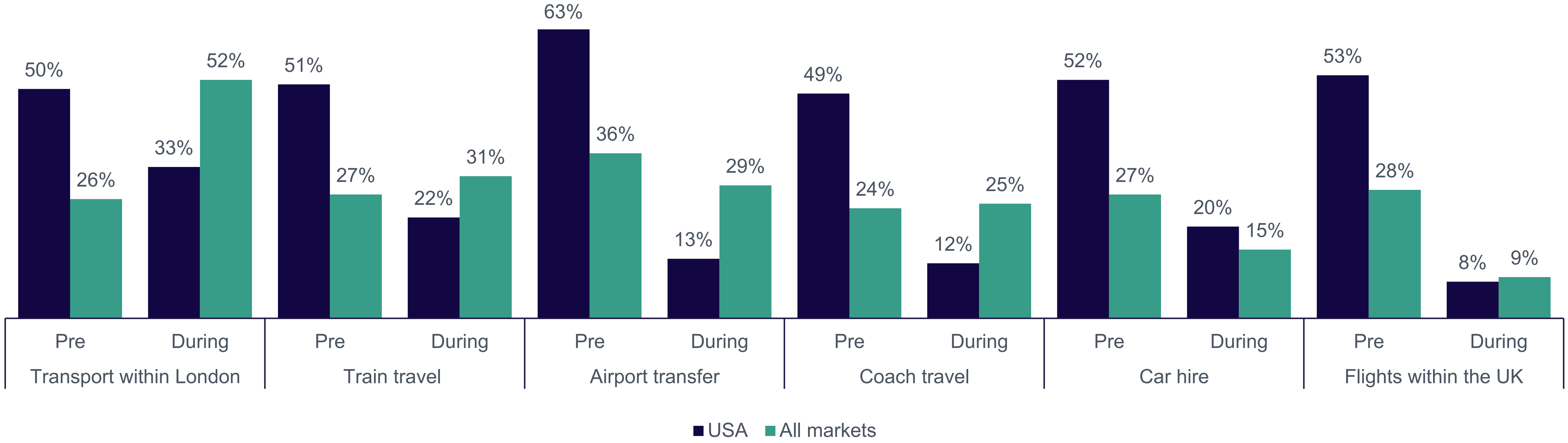


- Public transport is a favourable method used often to get around towns/cities amongst Americans with over 1 in 2 visitors taking a bus, tube, tram or metro train during their visit.
- Compared to the all-market average, American visitors have a strong propensity to take taxis and they also over-index on all other forms of internal transport, apart from personal vehicle use.

Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for “car/vehicle you/group brought to the UK”

1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)



- Amercians are strong pre-bookers when it comes to transportation; they are more likely than the average to pre-book all transport services available.
- Transportation from the airport was the most commonly booked mode of transport in the UK with 63% of visits from the US having booked before arrival to the UK. Americans are much less likely to book all forms of transportation during their trip to the UK, with around 50% having pre-booked all other forms of transport.

Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

1.3 Visitor demographics

Visitor characteristics

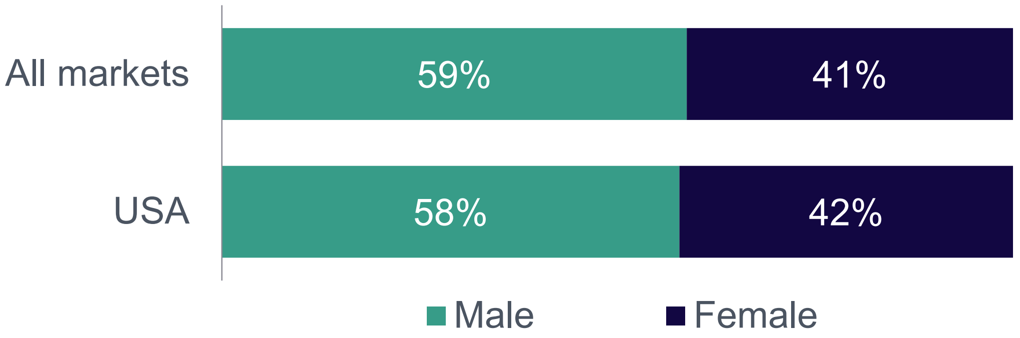
- American visitors tend to be older than the average visitor to the UK. 48% of American visitors were aged 45+ compared to the market average of 40%.
- Visitors from America are marginally more likely to be male (58%) than female (42%) overall, while business visitors are more than three times as likely to be men than women.
- Solo travel is the most popular choice for travel to the UK, followed by a 3rd travelling with a spouse or partner.
- Within the USA, the states of California and New York are the largest source markets for visits to the UK. Visits from California and the wider tri-state area (New York, New Jersey and Connecticut states) combined generate over a third (35%) all visits from the US.
- 86% of visits from American residents to the UK were made by American nationals, 6% by British nationals.
- Almost 6 out of 10 American holiday visitors (excl. UK nationals) make a repeat visit to Britain, with an average of 4.2 visits to the UK across a ten year period*.

Almost 1 in 2 US visitors to the UK are aged over 45+

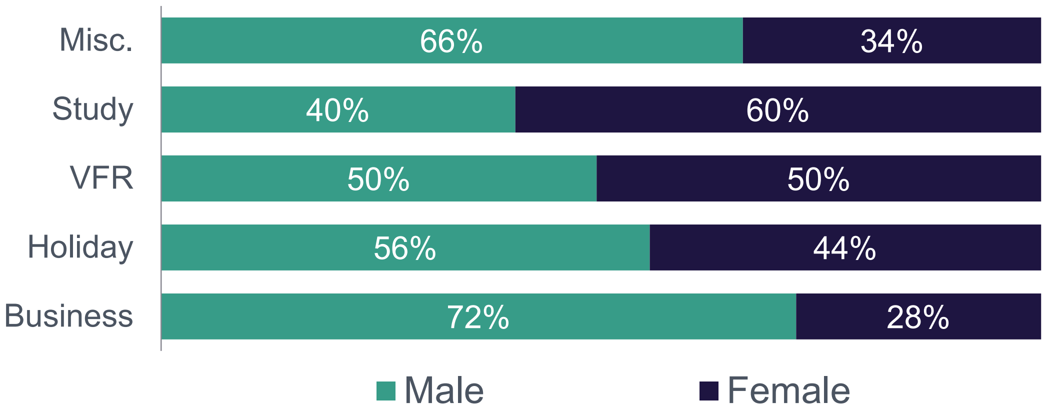
Source: International Passenger Survey by ONS, *IPS 2015

1.3 Visitor demographics: gender and age groups

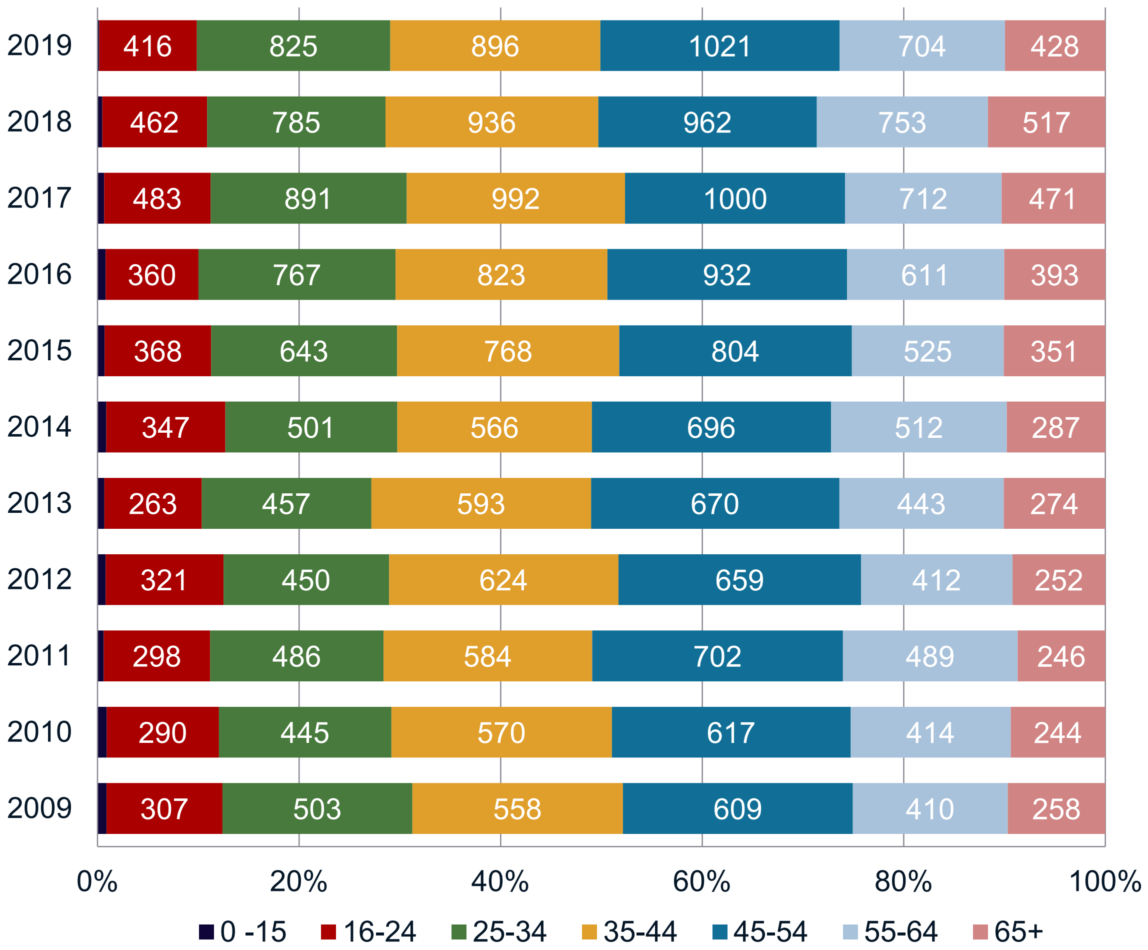
Gender ratio of visits (2019):



Gender ratio of visits from the USA by journey purpose (2019):



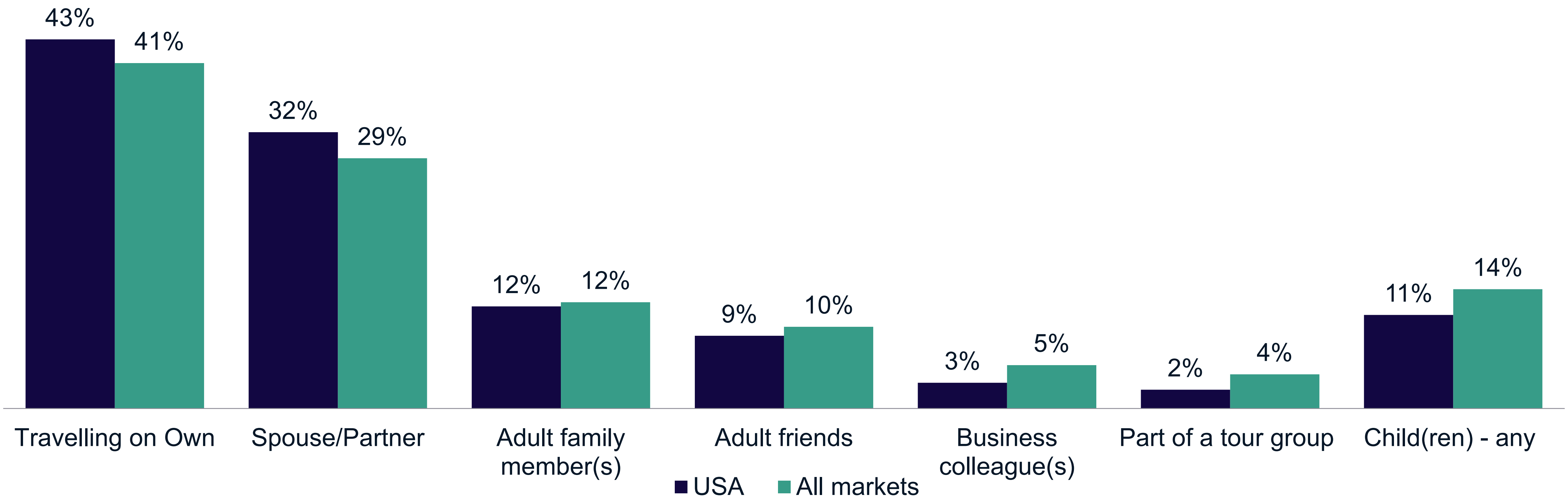
Age group trend (visits in 000s)



Source: International Passenger Survey by ONS

1.3 Visitor demographics: travel companions

Who have American visitors to the UK travelled with?



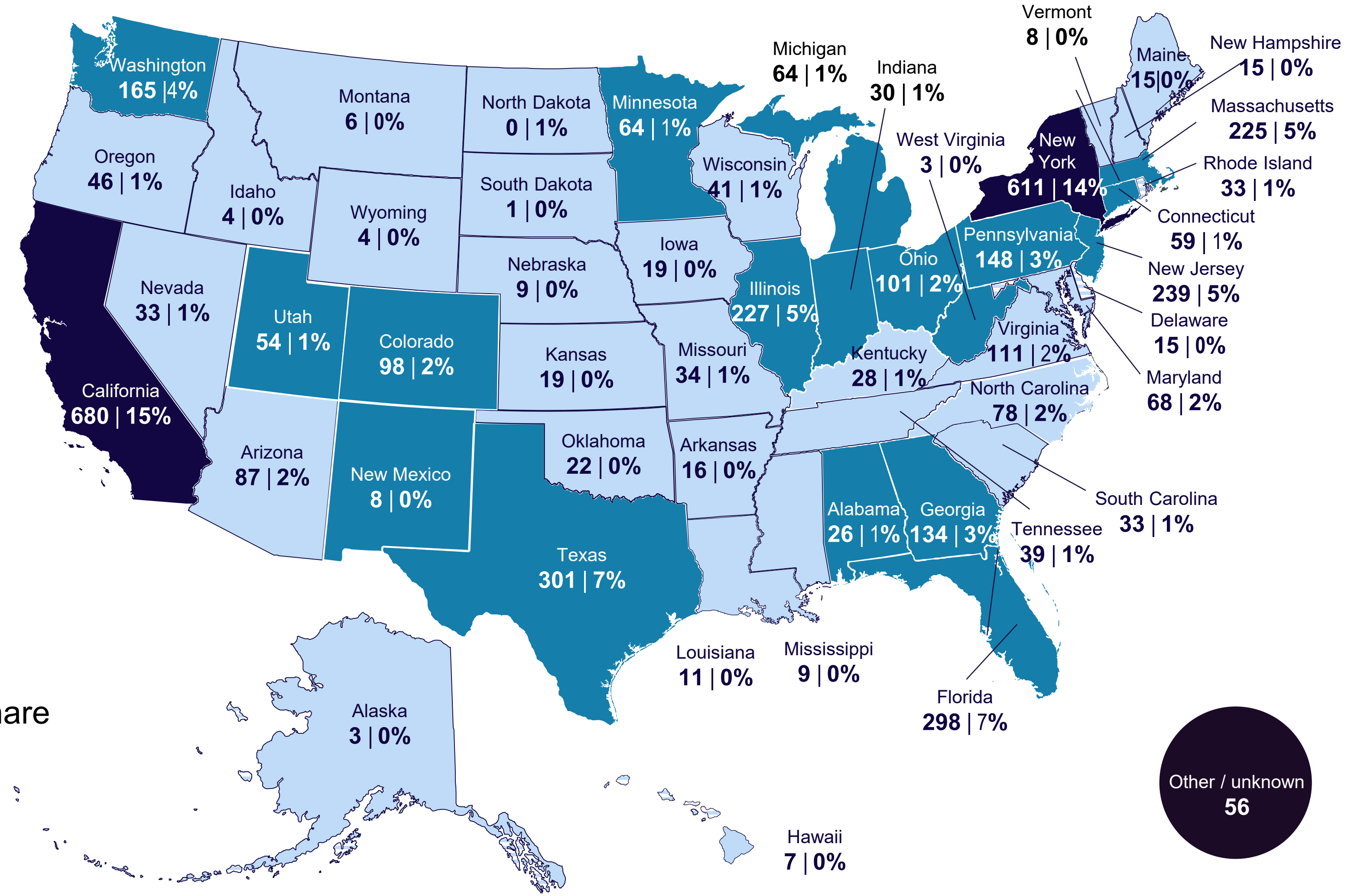
- Solo travel is the most popular form of travel for American visitors (43%), followed by travelling with a spouse/partner (32%).
- Around 1 in 10 visit with adult family members, friends or with children. Only 2% travel to the UK as part of a tour group, and US residents were less likely than the global average to do so.

Source: International Passenger Survey by ONS, 2017. “Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?”

1.3 Visitor demographics: Origin

Visits to the UK (2019)

- The largest proportion of American visitors who came to the UK reside in California (15%) and New York (14%). These two states generate 29% of all inbound visits from the US. Texas and Florida both represented 7% of US inbound flow to the UK in 2019.
- While California is the most populated state in the US, New York ranks in 4th position behind Texas and Florida. It's the strong connectivity that reflects the key American source states of California and New York.



Visits in 000s | % share of visits

- High
- Medium
- Low
- None

Source: International Passenger Survey by ONS 2019, World Population review 2021

1.4 The UK and its competitors (1)

Market size, share and growth potential

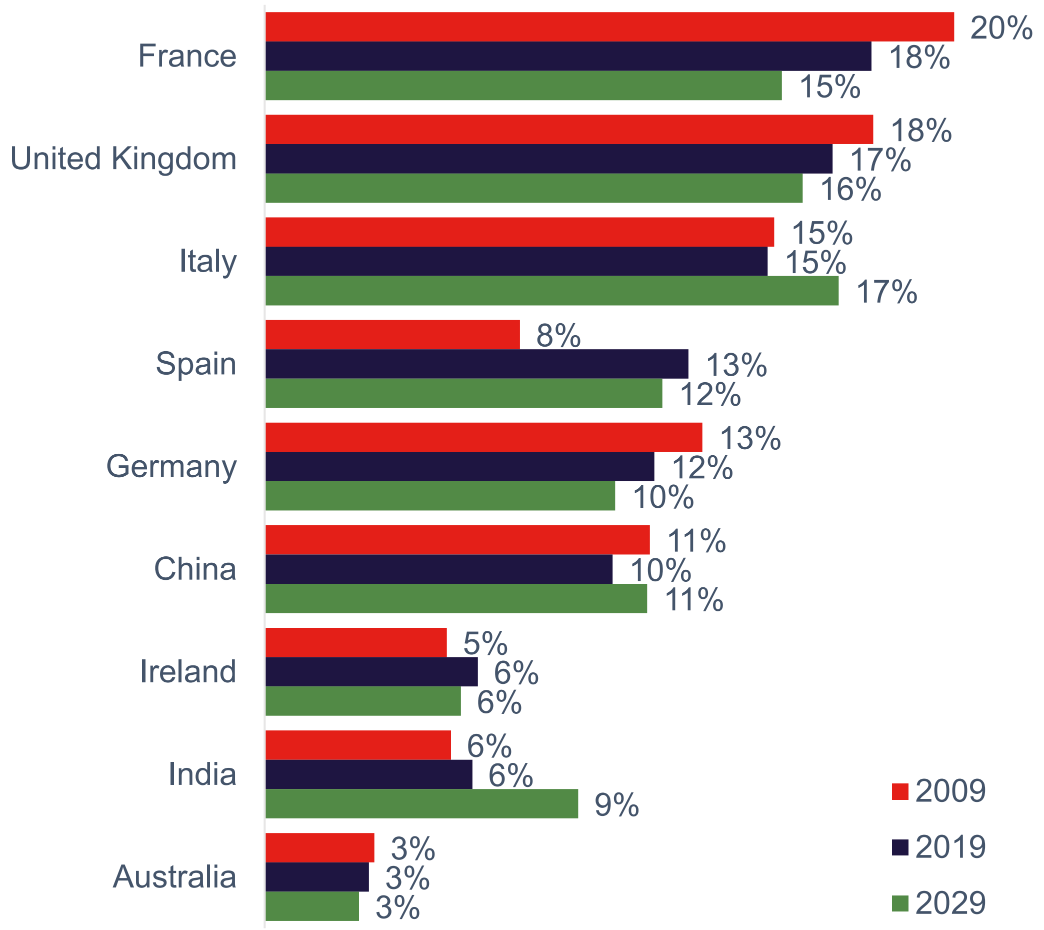
- Britain was the 5th most visited international destination and 2nd most visited European destination by American travellers in 2019, behind Mexico, Canada, the Caribbean and France.
- Of those who came to Britain for a holiday, 57% considered France, 47% Italy, 45% Germany and 44% Spain as an alternative holiday destinations showing high competition within Western Europe.
- Over the past decade, the UK has seen 65% growth in visits from the US. The UK lost share amongst its competitor set, however, due to stronger growth in US arrivals to other competitor destinations. Amongst the US competitor set, European destinations Spain (+193%) and Ireland (+107%) recorded the strongest growths in arrivals from the US between 2009 and 2019.
- The impact of the COVID-19 pandemic led to a huge drop in 2020 with short to medium recovery depending on factors such as vaccine rollout and travel restrictions easing. At present pre-pandemic figures, both volume and value are not expected to return until 2024.
- Despite the severe shorter-term impact of the COVID-19 pandemic, visits from the American market are forecast to grow by 26% between 2019 and 2029. With regards to competitor share, India (+3pts), Italy (+2pts) and China (+1pt) are predicted to gain a sizable share of the US market over the next decade.

The UK ranks 5th for US outbound overnight visits

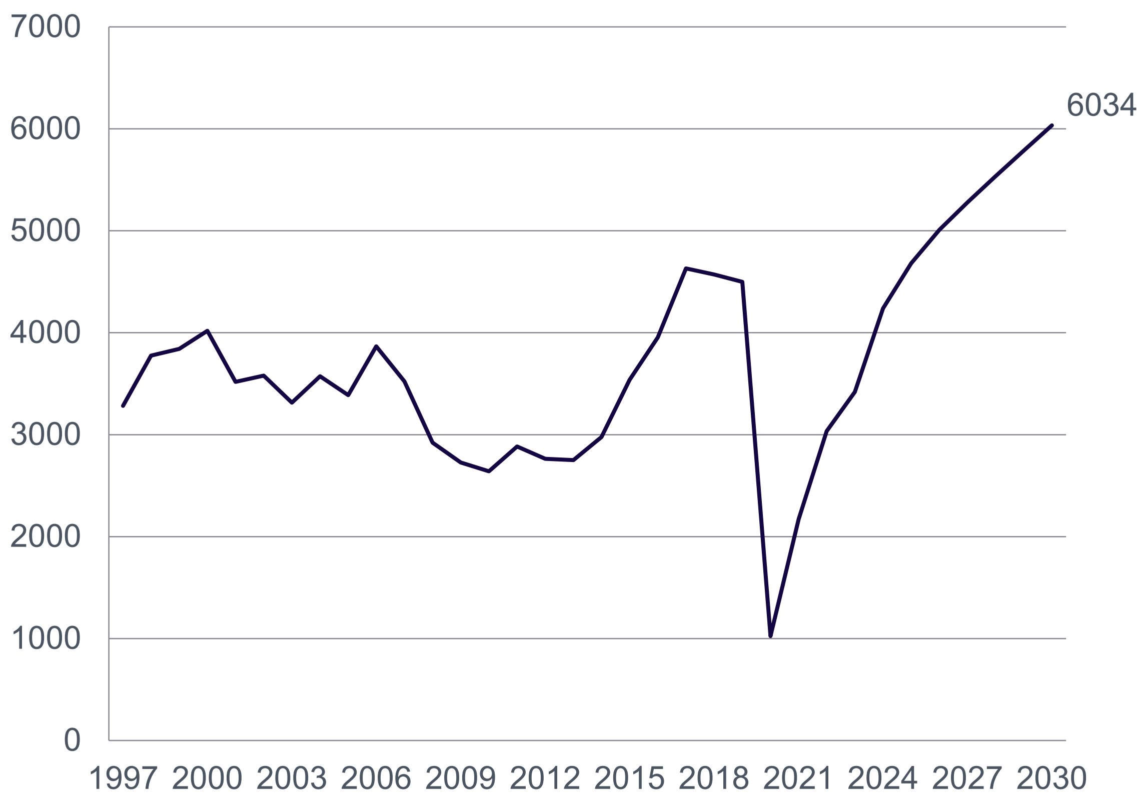
Source: Oxford Economics, VisitBritain/IPSOS 2016

1.4 The UK and its competitors (2)

The UK's market share of American visits among competitor set



Historic and potential visits to the UK (000s)

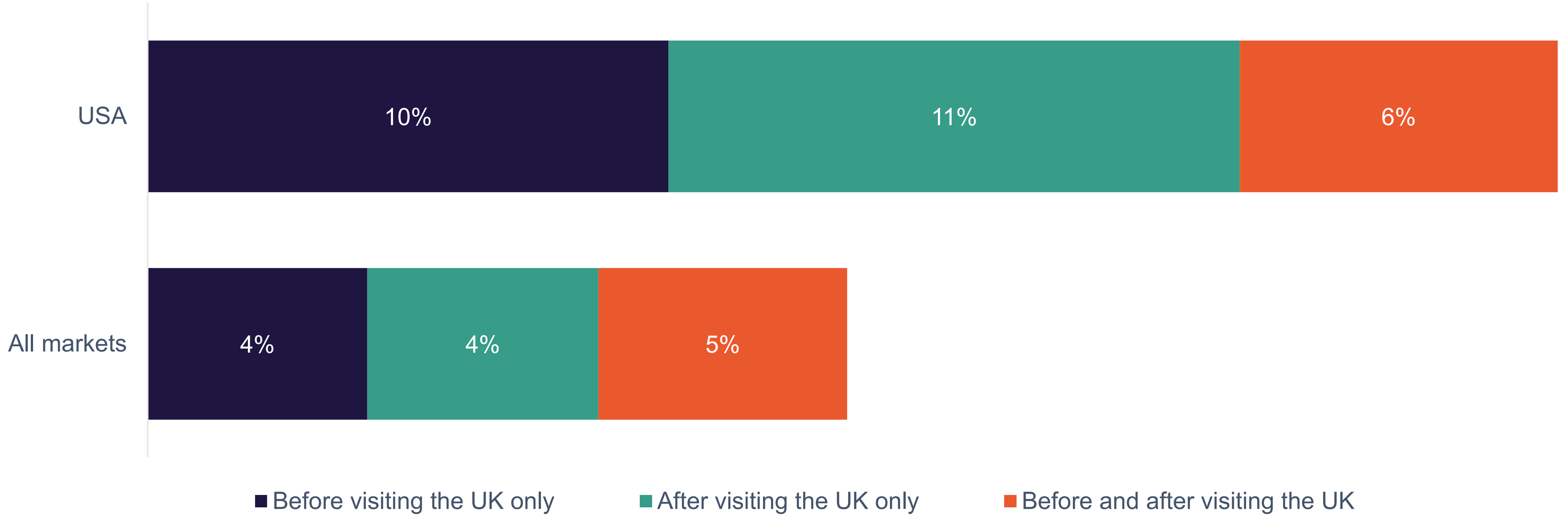


Source: Oxford Economics for competitor set based on overnight visits, 'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations, VisitBritain/IPSOS 2016

VisitBritain VisitEngland

1.4 The UK and its competitors (3)

Propensity for US travellers to visit the UK as part of a multi-country trip



- With the US being a long haul market and Europe having a competitive offering, Americans are more likely to visit the UK as part of a multi-country trip than the global average.
- Around 1 in 10 visit the UK before or after taking a trip to another other destination.

Source: International Passenger Survey by ONS 2016. “When are you planning to visit other countries while on your trip to the UK?”

Experiences and perceptions

Chapter 2

2.1 Inbound activities: summary

- Dining in restaurants is the number one activity for American visitors to the UK, enjoyed by around 76% of inbound arrivals. Another very popular activity, undertaken by more than half of visitors (58%) is sightseeing famous monuments/buildings. Shopping and going to the pub are also ranked within the top 5.
- When Americans visit the UK for a holiday they have an even higher propensity to engage in these activities.
- Culture and history are strong pulls to the UK too. Americans have a higher than average propensity to visit museums and art galleries and over 4 in 10 visit historic houses and castles.
- Four out of ten visits involve time in a park or garden and the activity of going for a walk, hike or ramble has a higher than the average propensity.
- Watching sport is a stronger motivator to visit Britain than the average visitor. About 53,000 visits per annum feature time watching football.

Top 10 activities for American visitors during their visit to the UK

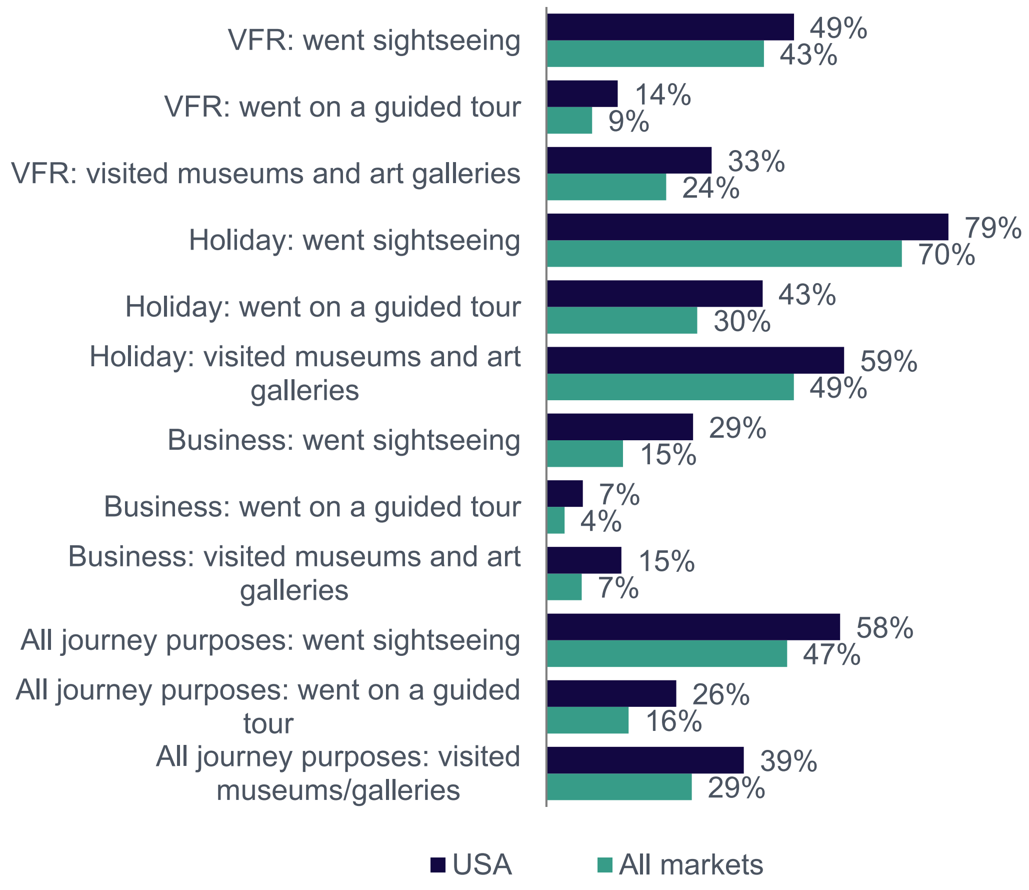
1. Dining in restaurants
2. Sightseeing famous monuments/buildings
3. Shopping
4. Going to the pub
5. Socialising with locals
6. Visiting castles or historic houses
7. Visiting parks or gardens
8. Visiting museums or art galleries
9. Visiting religious buildings
10. Going for a walk, hike or ramble

For more information on activities, please visit our webpage of activities undertaken in Britain

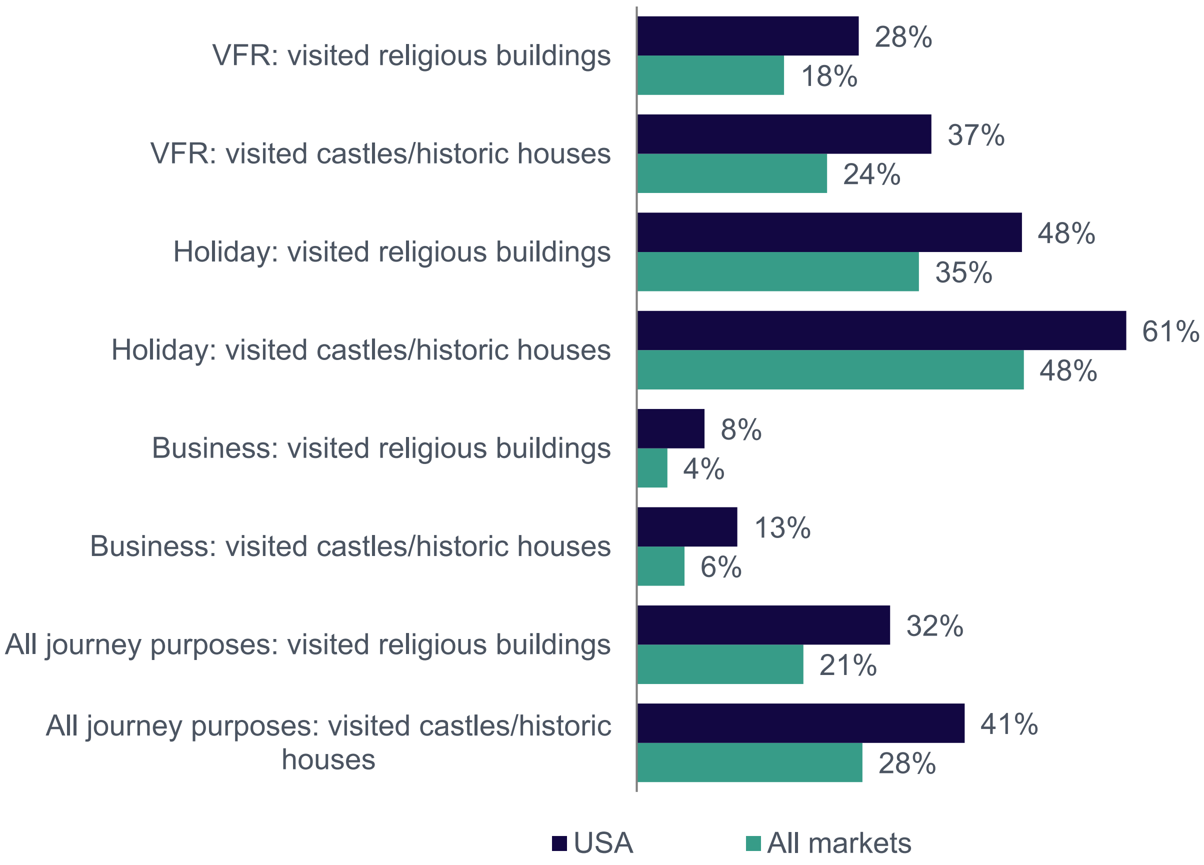
Source: International Passenger Survey by ONS, rankings based on 2007-2019 data

2.1 Inbound activities: tourism and heritage

Propensity to visit museums and galleries



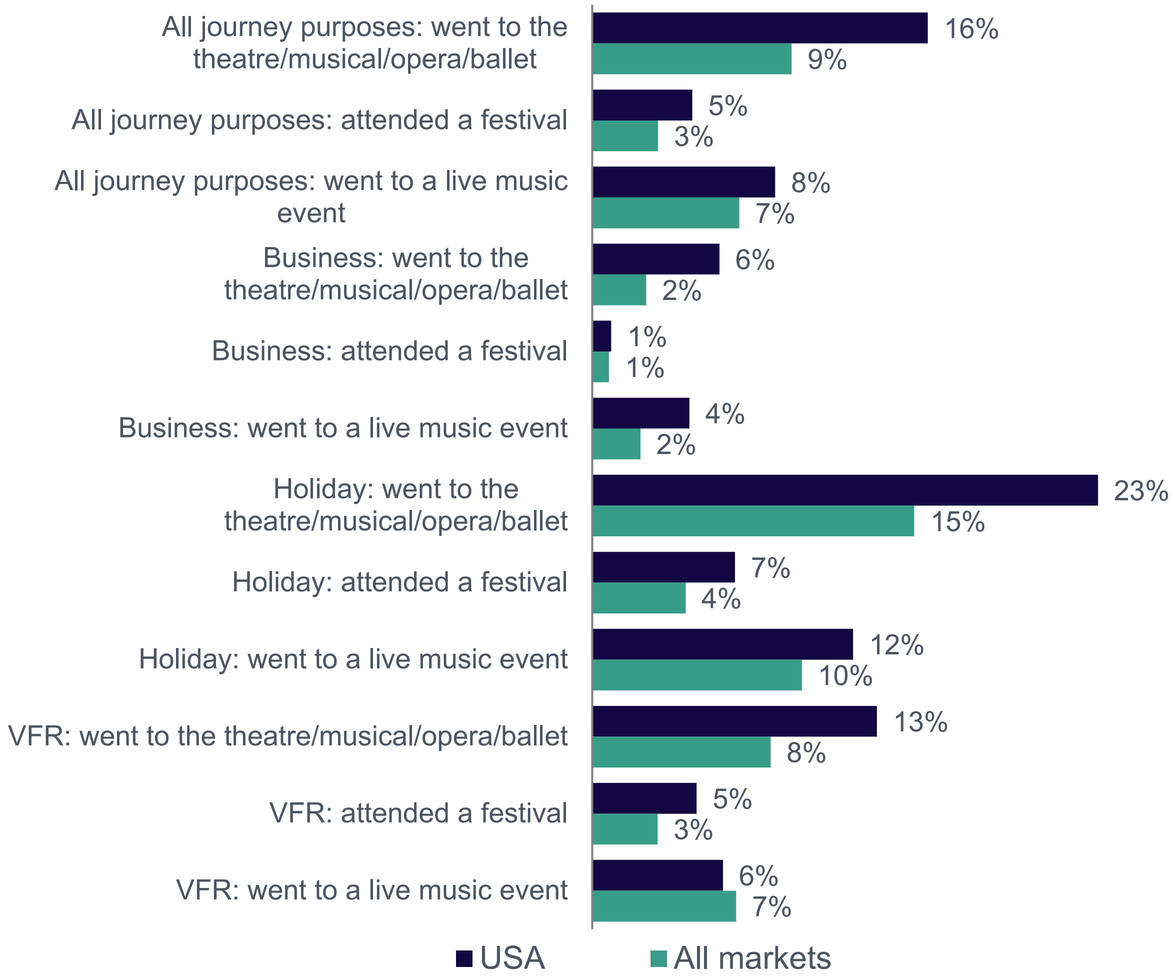
Propensity to visit built heritage sites



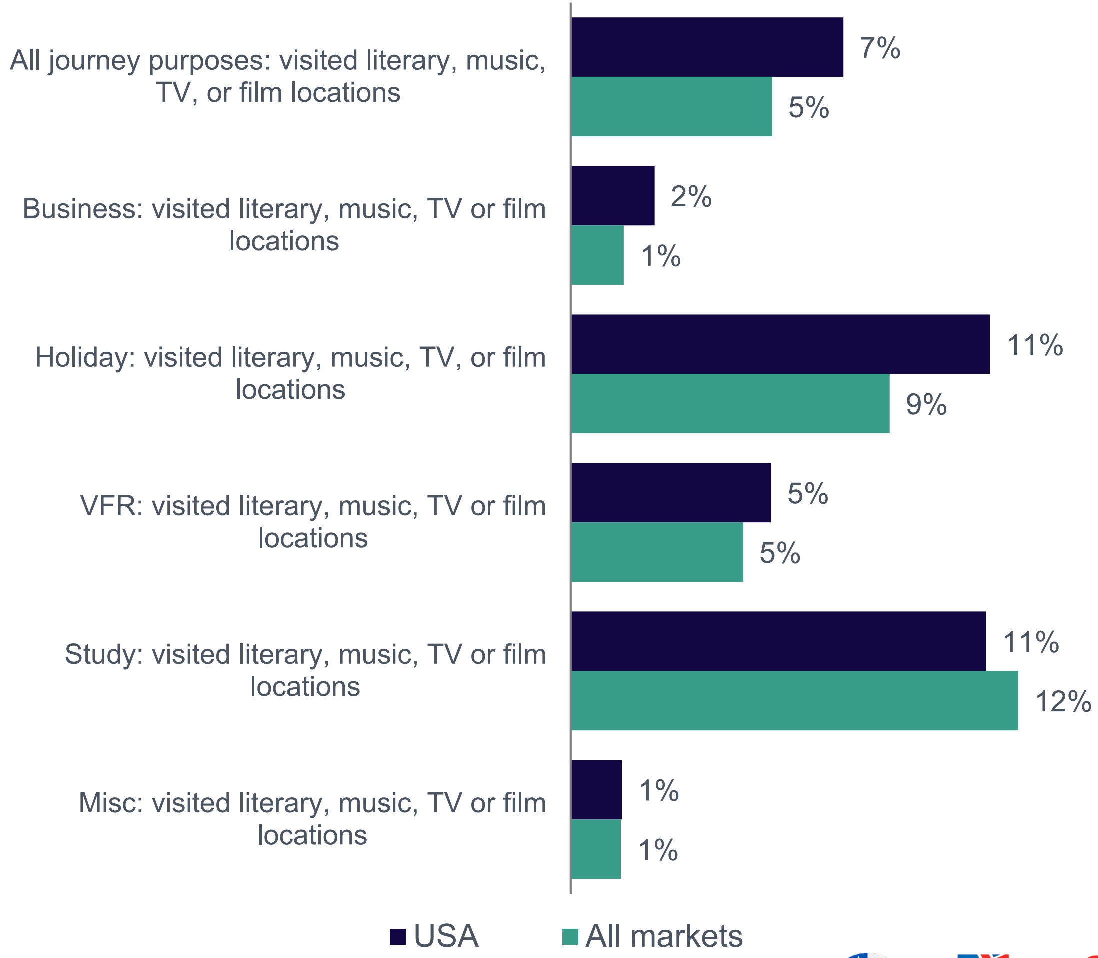
Source: International Passenger Survey by ONS, 2007-2019

2.1 Inbound activities: culture

Propensity to attend the performing arts



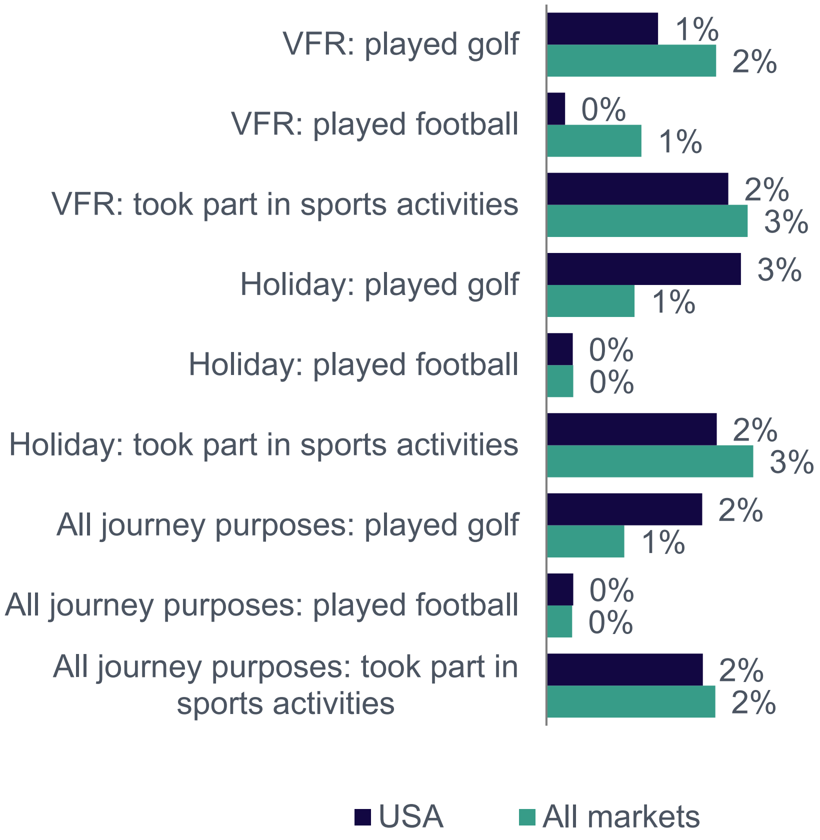
Propensity to participate into other culture-related activities



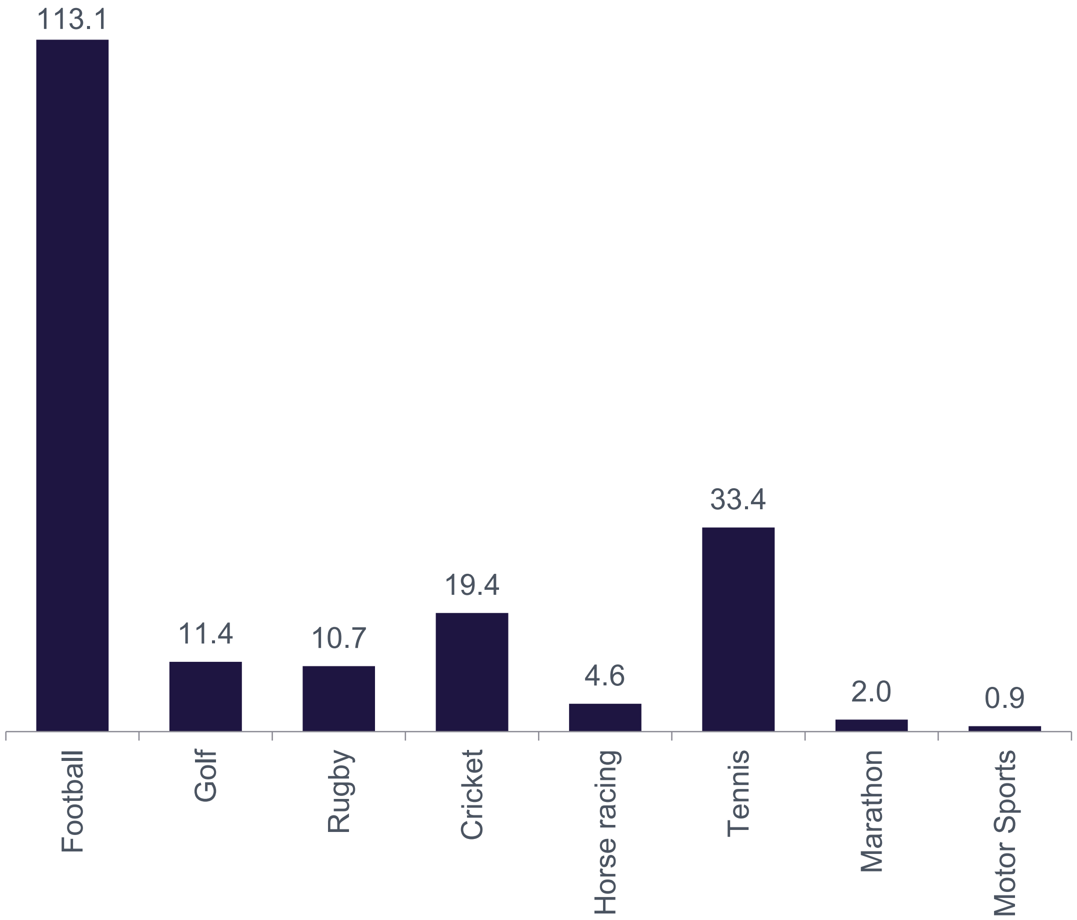
Source: International Passenger Survey by ONS, 2007-2019

2.1 Inbound activities: sports

Propensity to partake in sports-related activities



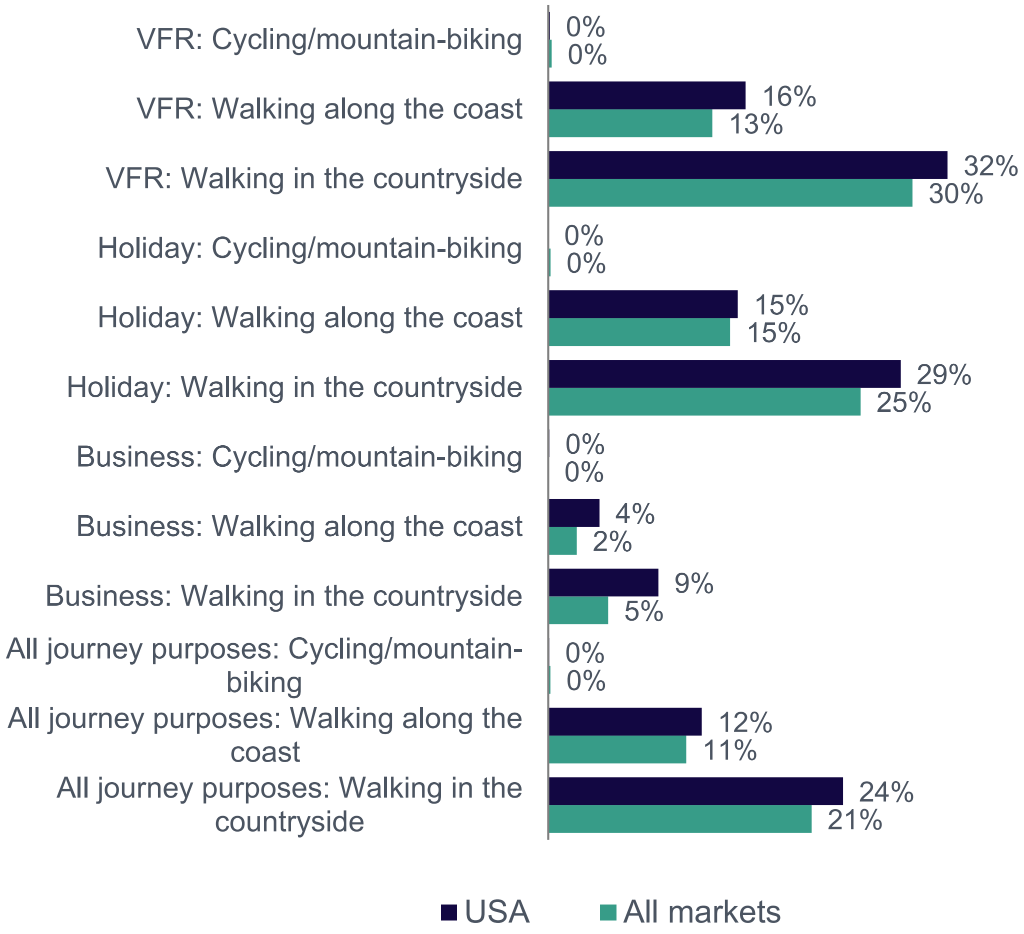
Number who watched sports live during trip (000s)



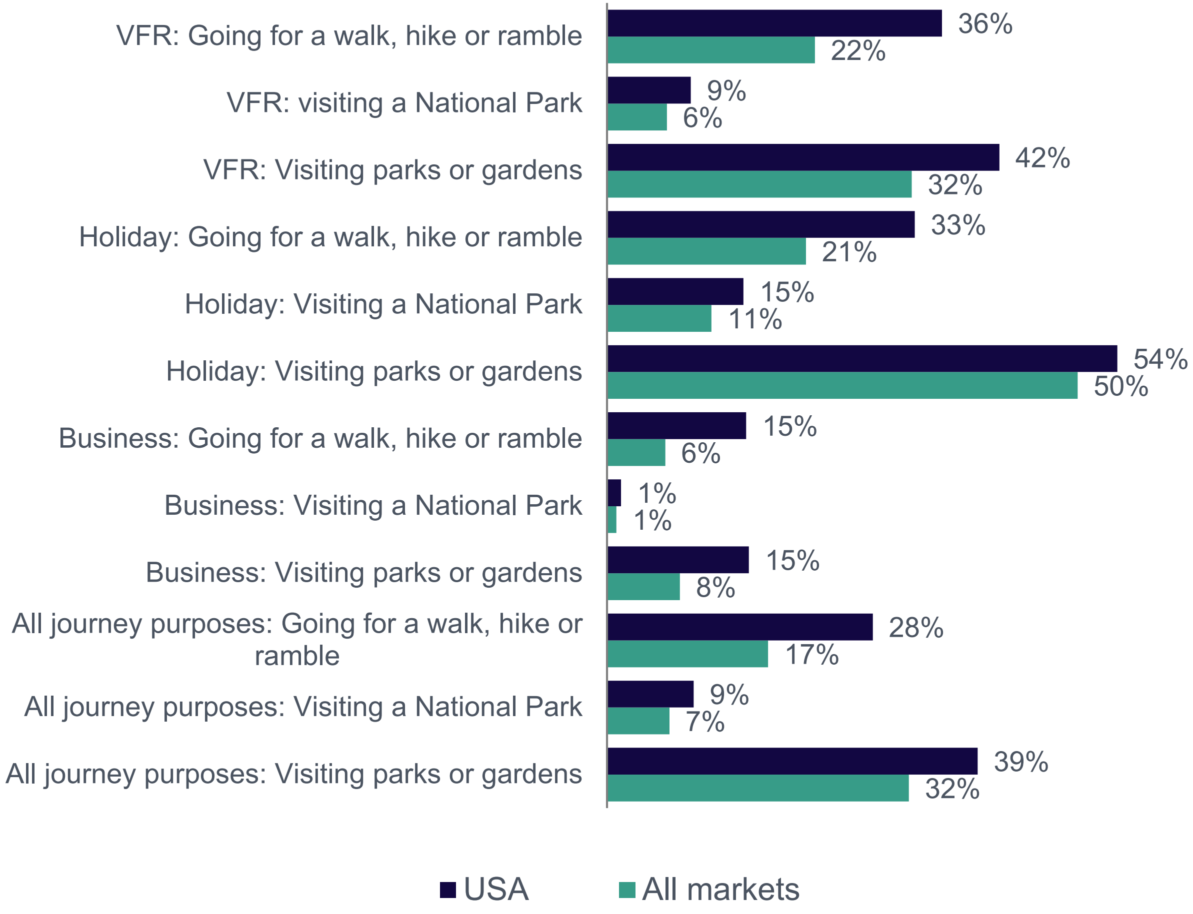
Source: International Passenger Survey by ONS, 2007-2019

2.1 Inbound activities: outdoors

Propensity to go for a walk or cycle



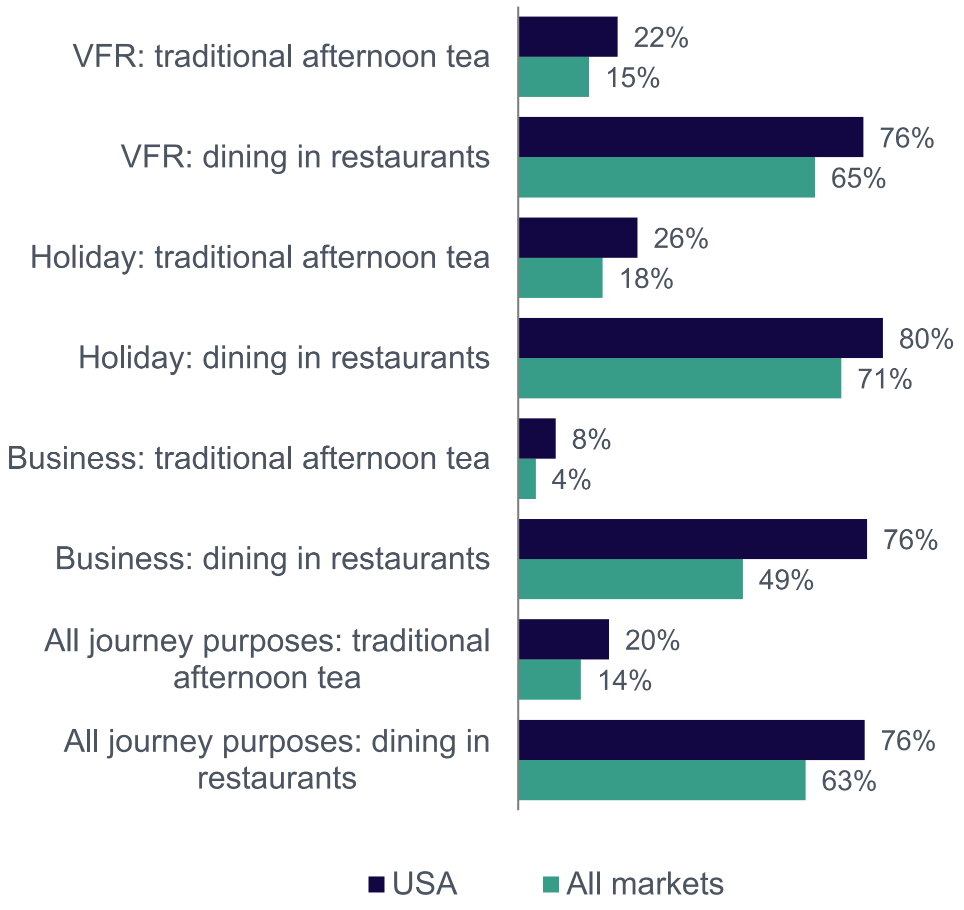
Propensity to enjoy the outdoors



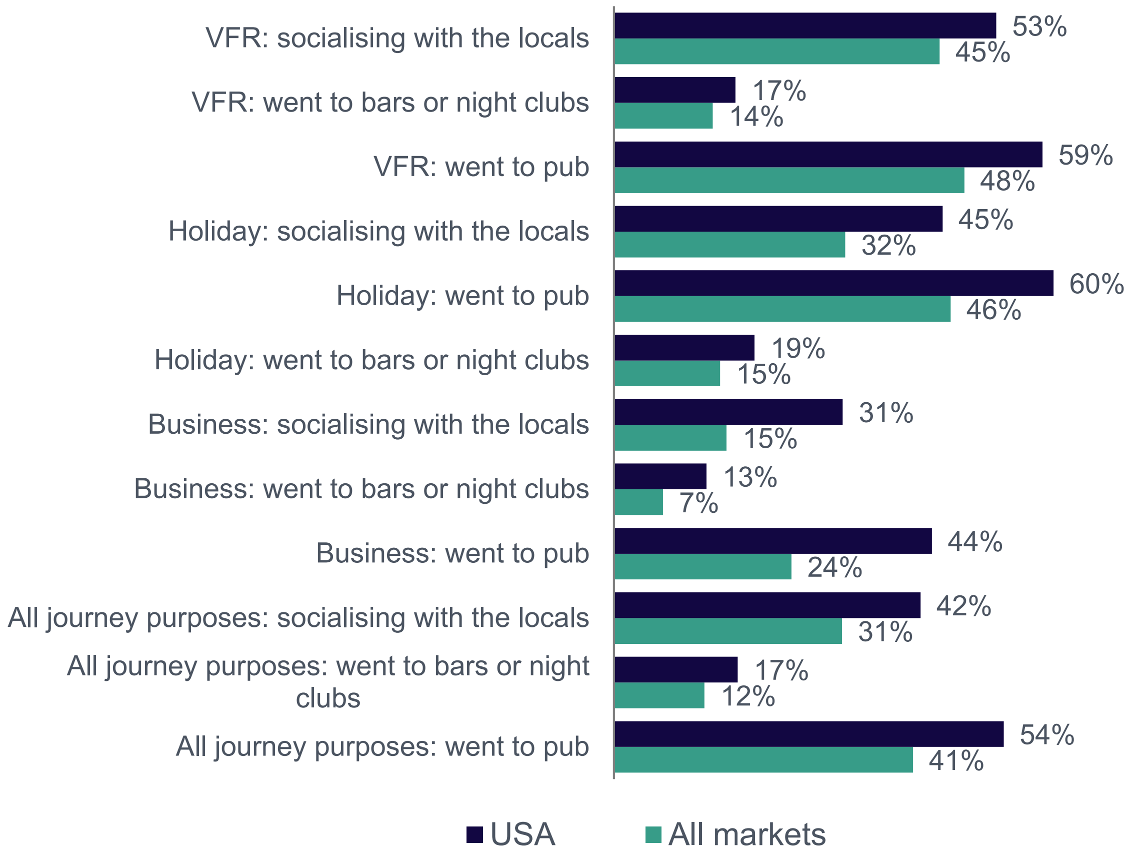
Source: International Passenger Survey by ONS, 2007-2019

2.1 Inbound activities: going out

Propensity to go to restaurants, or to have a traditional afternoon tea



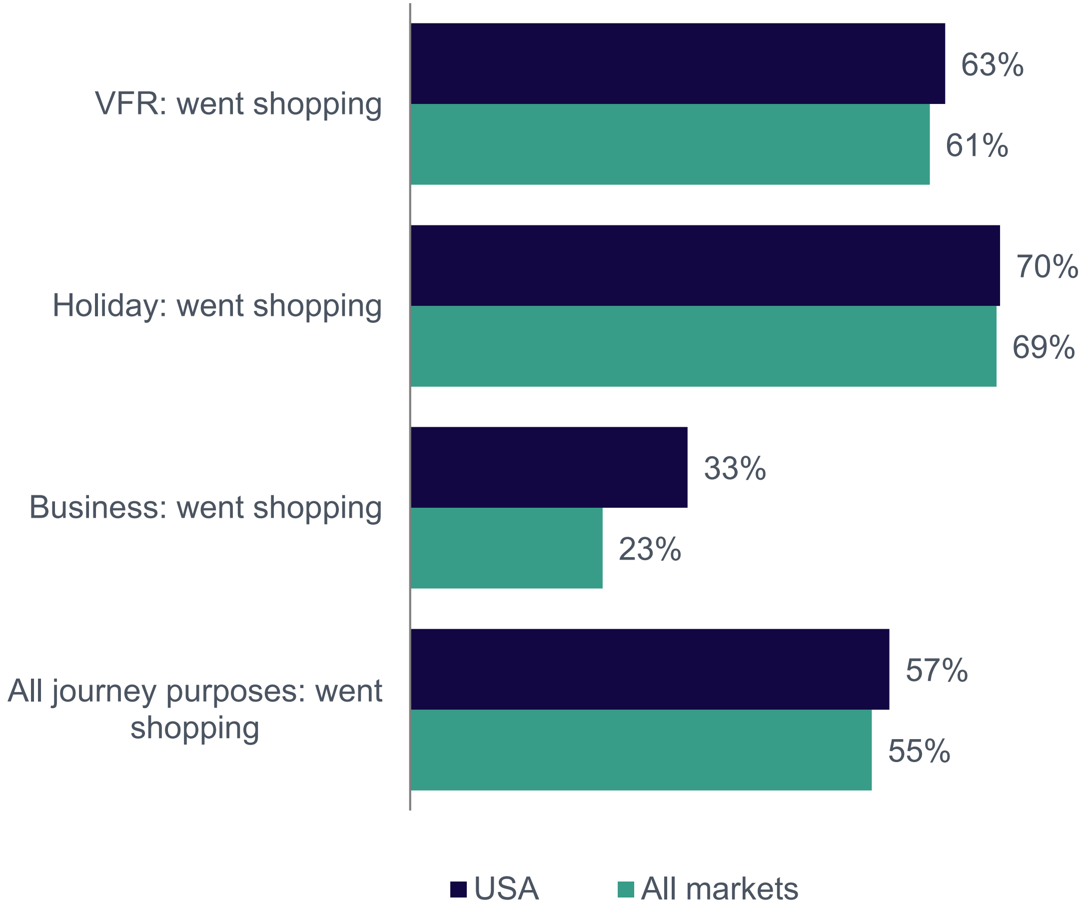
Propensity to go to the pub or bars and night clubs, or to socialise with locals



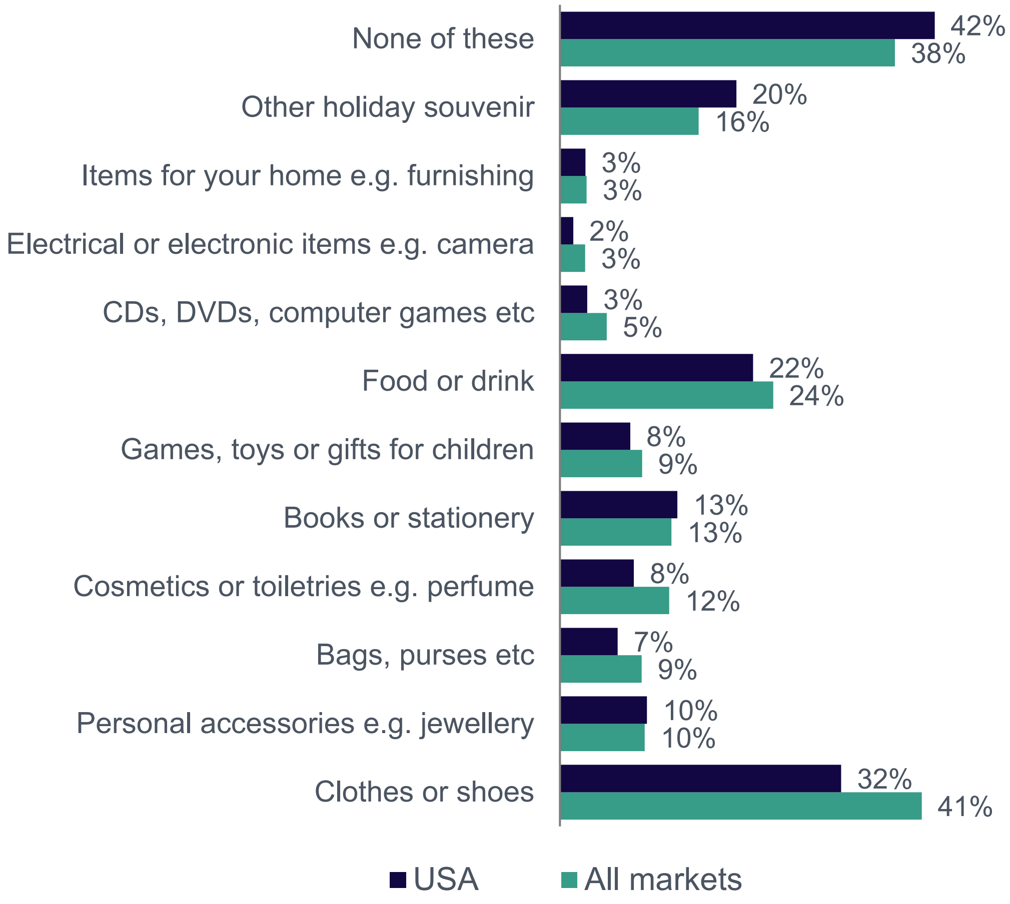
Source: International Passenger Survey by ONS, 2007-2019

2.1 Inbound activities: shopping

Propensity to go to shopping



Propensity to purchase selected items



Source: International Passenger Survey by ONS, 2007-2019

VisitBritain VisitEngland

2.2 Experiencing a visit to the UK

- 87% of visitors from America felt very welcome during their stay in the UK, above the inbound average. A similar share of American visitors were very likely to recommend a stay in the UK for a holiday or a short break at the end of their visit. There were virtually no visits that were unlikely to recommend visiting the UK or that felt unwelcome.
- Propensity to feel welcome or to recommend the UK among American visitors was slightly above the all-market average.
- Asked for reasons which would encourage Americans to return to a destination for a holiday, the local food and drink, new sights or attractions, and the ease of getting around were found to be the top three reasons for considering a return.
- However, if we only consider those who have been to the UK before, half would be influenced to go back to visit a different part of the country. This is followed by about 2-in-5 willing to return to experience a new activity or see new sights and attractions.

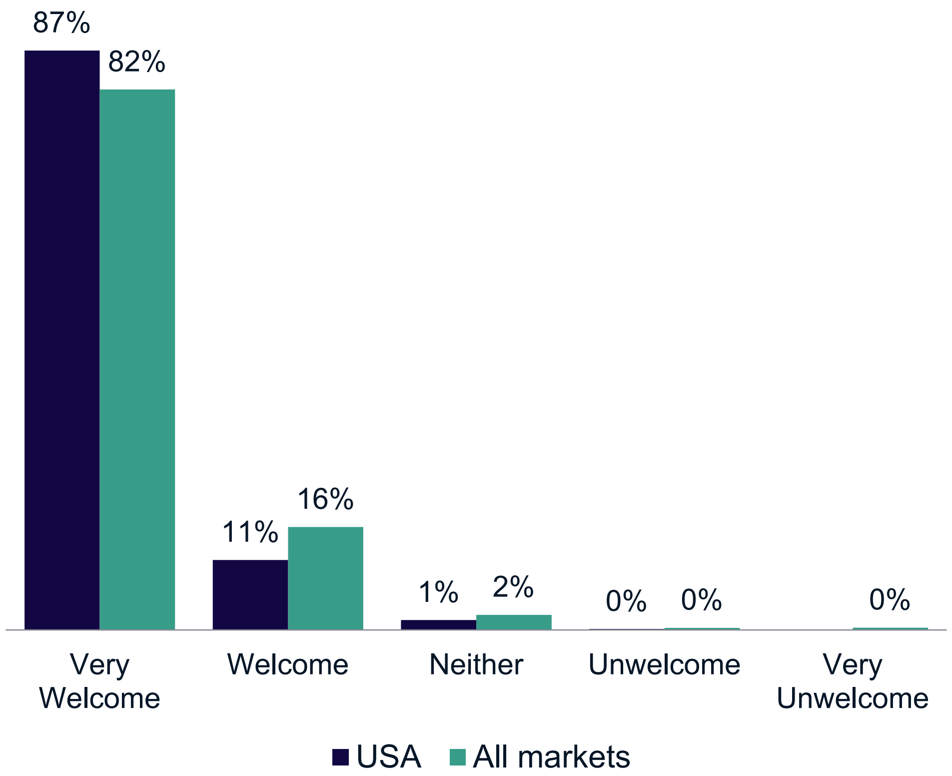
88%

of American visitors would recommend a holiday or short break in the UK*

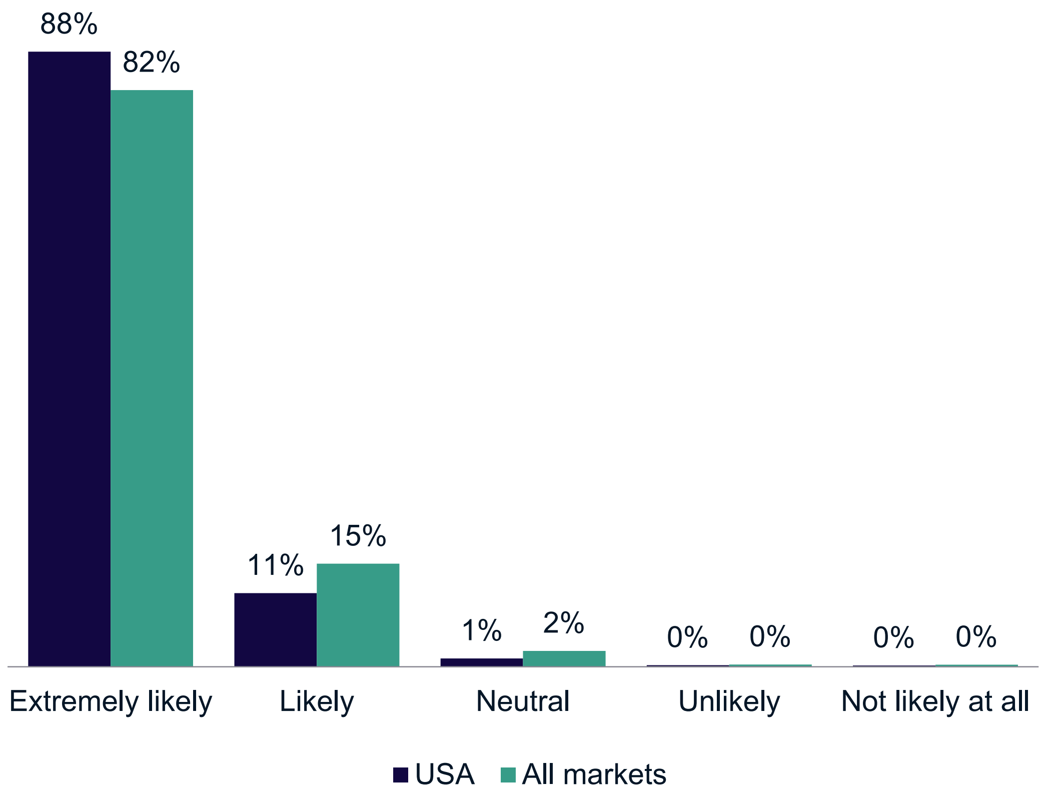
Source: IPS by the ONS (2017; *all visits, excluding UK nationals and nil-night visits), 2019 Ipsos/VisitBritain (previous visits refer to previous holiday visit made to the UK)

2.2 Welcome and recommending Britain

Feeling of 'welcome' in Britain



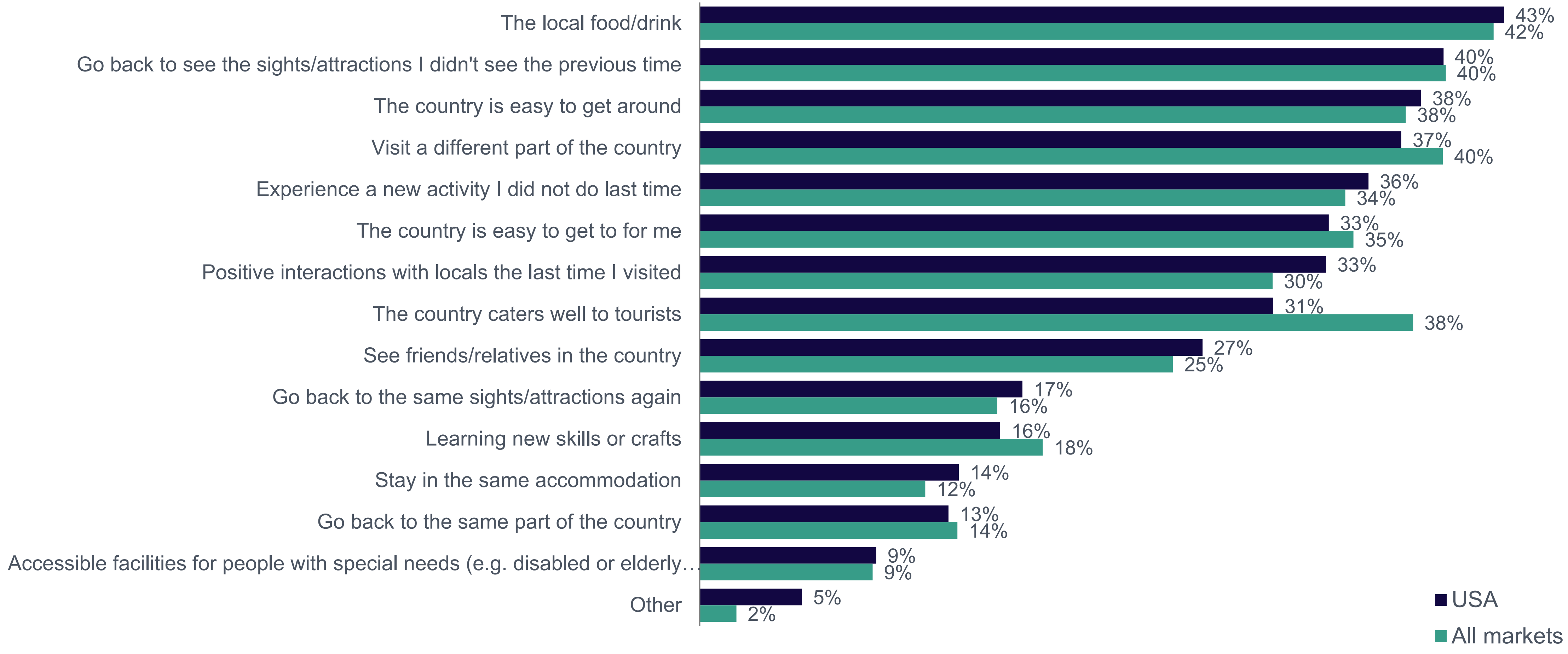
Likelihood to recommend Britain



Source: International Passenger Survey by ONS, 2017

2.2 Reasons to return to a holiday destination

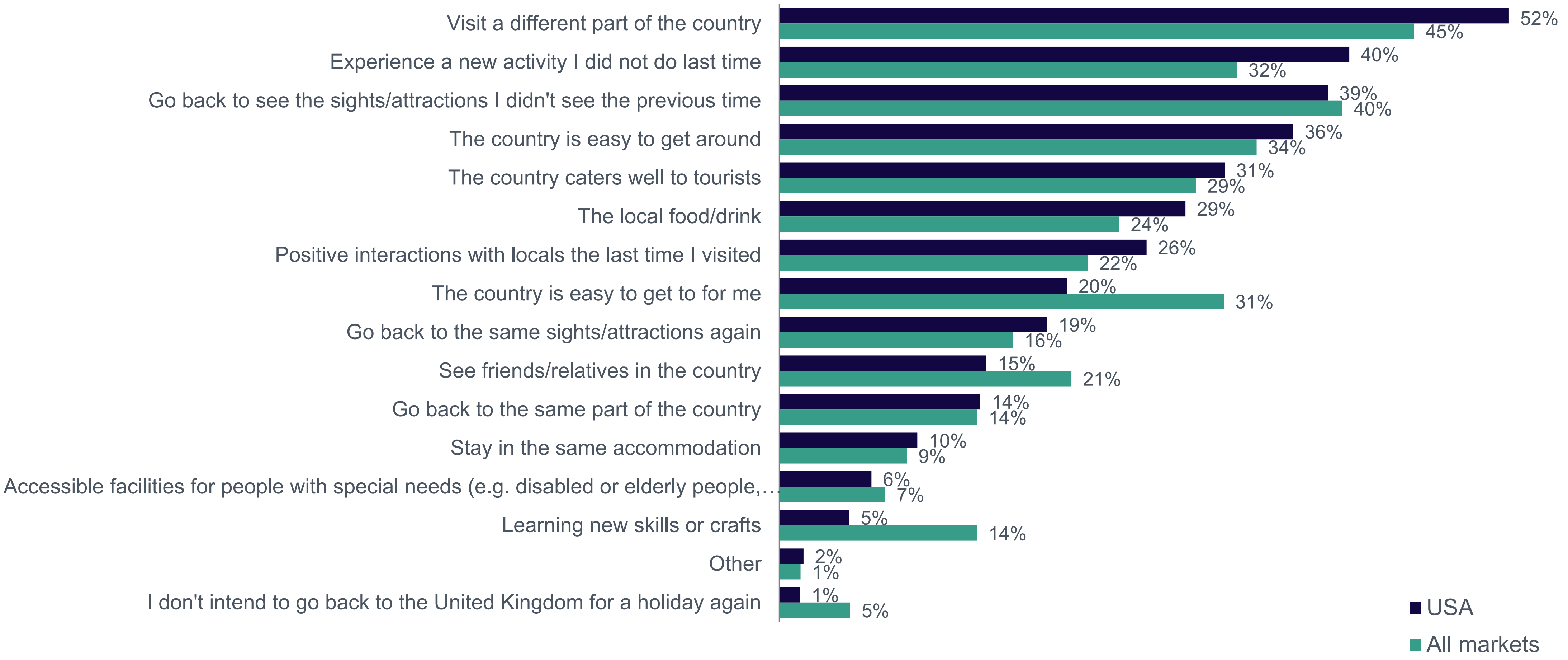
Reasons to return to a destination in general



Source: Anholt Nation Brands Index, powered by Ipsos 2019

2.2 Reasons to return to the UK

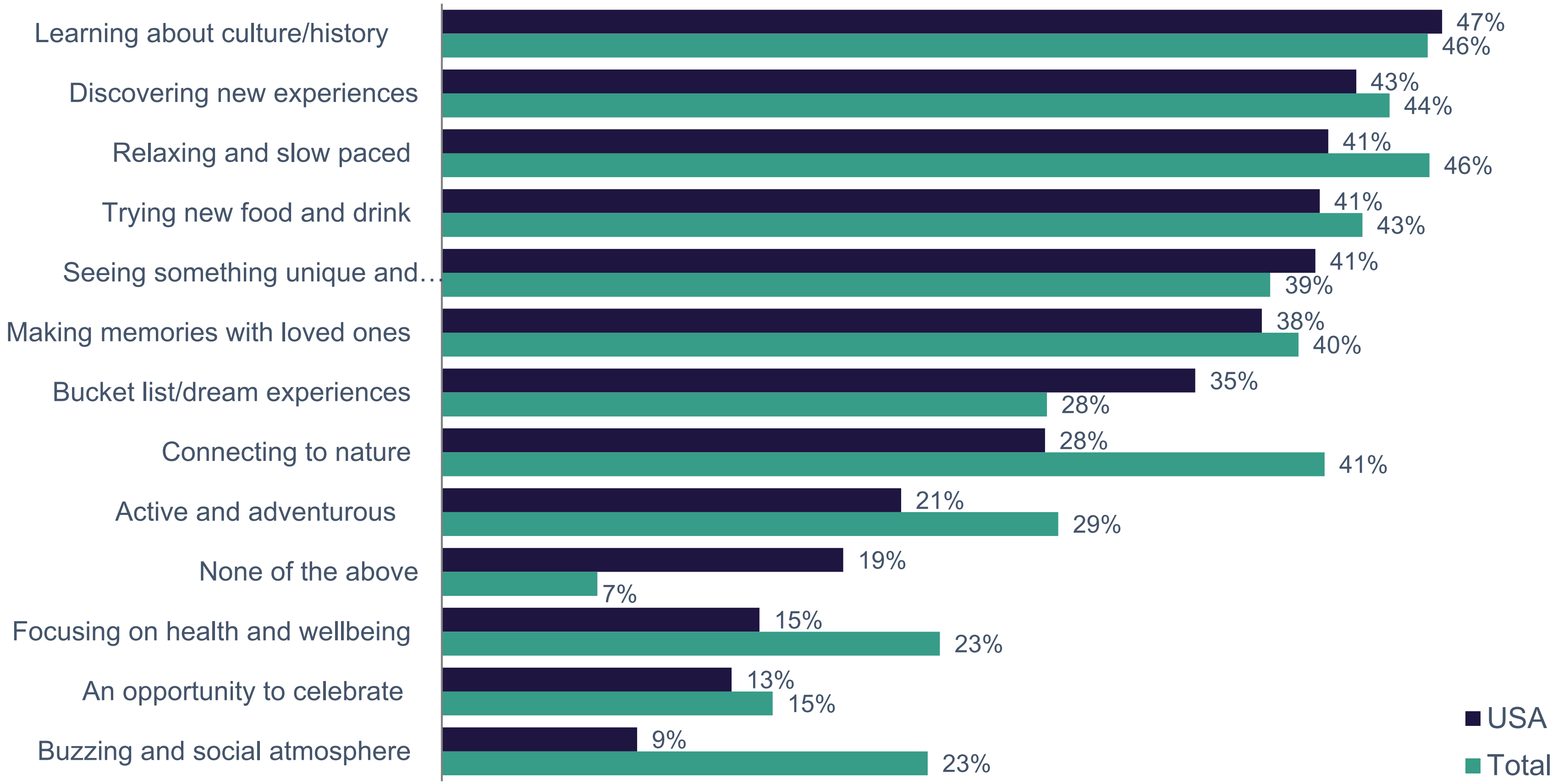
Reasons to return to the UK



Source: Anholt Nation Brands Index, powered by Ipsos 2019

2.2 Sought after experiences for an international holiday

Sought after experiences for an international holiday



Source: Anholt Nation Brands Index, powered by Ipsos 2021

2.3 Perceptions of the UK (1)

- In 2021, Americans rated the UK highly for vibrant cities, contemporary culture, sports, and welcome, but less so for its natural beauty (20th).
- Overall, Americans ranked the UK 5th – a decrease of 2 ranks from 2020 caused by marginally lower scores for natural beauty and cultural heritage.
- Museums are the cultural products or services Americans most strongly associated with the UK, followed by films, music and sport.
- A trip to the UK would be expected to be ‘educational’ (50%), ‘fascinating’ (41%), and ‘exciting’ (39%) – all much higher than global averages for each.
- Areas of strength for the UK include cultural attractions, ease of getting around, and its wide variety of places to visit.
- Italy and Australia are the destinations that Americans consider the ‘best place’ for delivering the things they most want from a holiday destination. However, the UK receives the highest score on the aspect that is perceived as the most important one during a holiday: having fun and laughter.
- Activities that appeal to potential visitors from the US include driving through the countryside of England, a food tour of London’s best foodie markets and taking a canal boat rude through the waterways of England.

Areas of strength for the UK:

Historic buildings, city life, contemporary culture, sports, welcome

Source: Anholt Nation Brands Index, powered by Ipsos 2021, VisitBritain/ Arkenford 2013 , Ipsos/Visitbritain 2018

2.3 Perceptions of the UK (2)

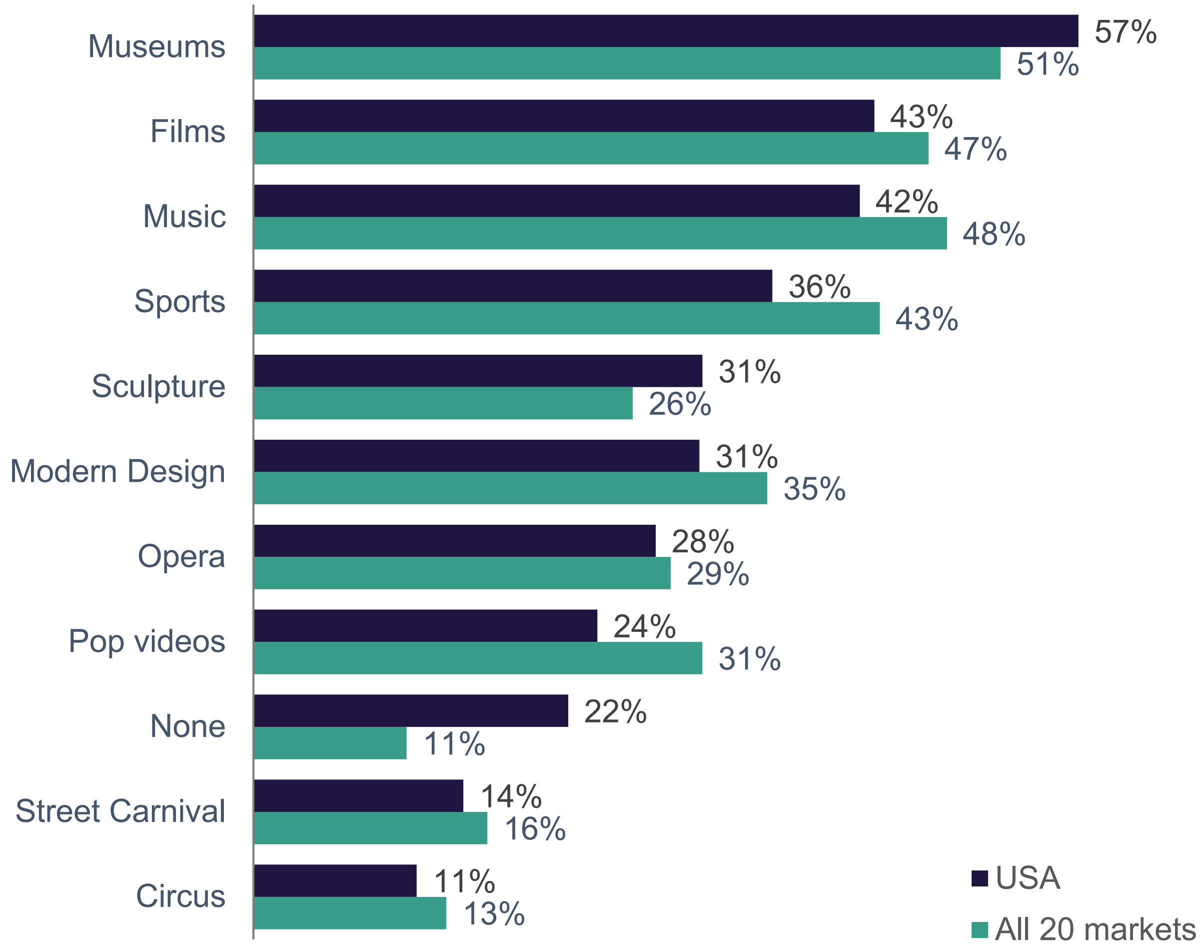
UK's ranking (out of 60 nations)

Measure - 2021	USA respondents	All respondents
Overall Nation Brand	**3**	**5**
Culture (overall)	**6**	**4**
The country has a rich cultural heritage	8	8
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	4	4
The country excels at sports	4	4
People (overall)	**5**	**10**
If I visited the country, the people would make me feel welcome	6	18
Tourism (overall)	**4**	**6**
Would like to visit the country if money was no object	4	7
The country is rich in natural beauty	20	31
The country is rich in historic buildings and monuments	5	5
The country has a vibrant city life and urban attractions	4	6

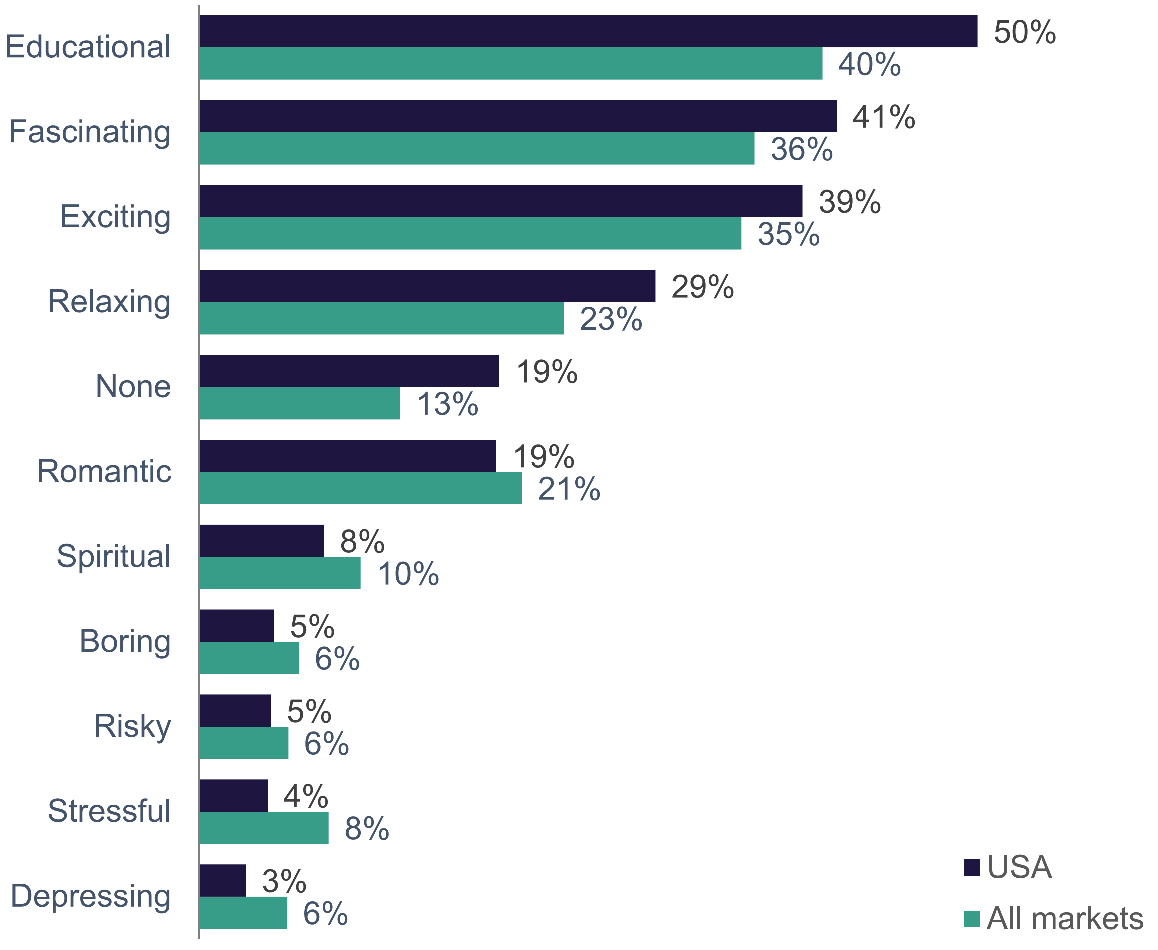
Source: Anholt Nation Brands Index, powered by Ipsos 2021

2.3 Perceptions of the UK (3)

Cultural associations



Adjectives describing a potential trip to the UK



Source: Anholt Nation Brands Index, powered by Ipsos 2021

2.3 Perceptions of the UK (4)

Holiday wants and % saying destination is best place for… top 20

Importance	Perception	GB	FR	IT	AU	GE	NL
6.25	Have fun and laughter	26%	17%	18%	15%	11%	8%
6.16	Enjoy the beauty of the landscape	30%	45%	58%	57%	31%	33%
6.15	Offers good value for money	20%	20%	24%	20%	17%	15%
6.1	Explore the place	33%	22%	43%	40%	18%	8%
6.07	Experience things that are new to me	28%	27%	46%	45%	20%	24%
6.06	The people are friendly and welcoming	31%	24%	37%	48%	23%	29%
6.03	See world famous sites and places	54%	61%	70%	30%	39%	20%
6.02	Do something the children would really enjoy	37%	33%	37%	43%	26%	23%
6.01	Enjoy local specialities (food and drink)	26%	60%	68%	27%	36%	15%
5.98	It offers unique holiday experiences	37%	46%	53%	59%	33%	34%
5.95	Soak up the atmosphere	20%	31%	47%	29%	20%	8%
5.92	Provides a wide range of holiday experiences	38%	41%	50%	52%	31%	25%
5.87	Broaden my mind/ Stimulate my thinking	33%	43%	49%	39%	33%	26%
5.83	Experience activities/places with a wow factor	33%	45%	58%	43%	20%	18%
5.8	Have dedicated time with my other half	36%	48%	52%	41%	31%	29%
5.8	Visit a place with a lot of history/historic sites	57%	54%	66%	16%	43%	21%
5.78	Enjoy peace & quiet	19%	18%	27%	34%	15%	26%
5.77	Enjoy high quality food and drink (gourmet food)	24%	66%	72%	13%	28%	11%
5.73	Do what I want when I want spontaneously	39%	33%	32%	22%	17%	14%
5.64	Chill/ slow down to a different pace of life	14%	21%	29%	27%	11%	15%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (5)

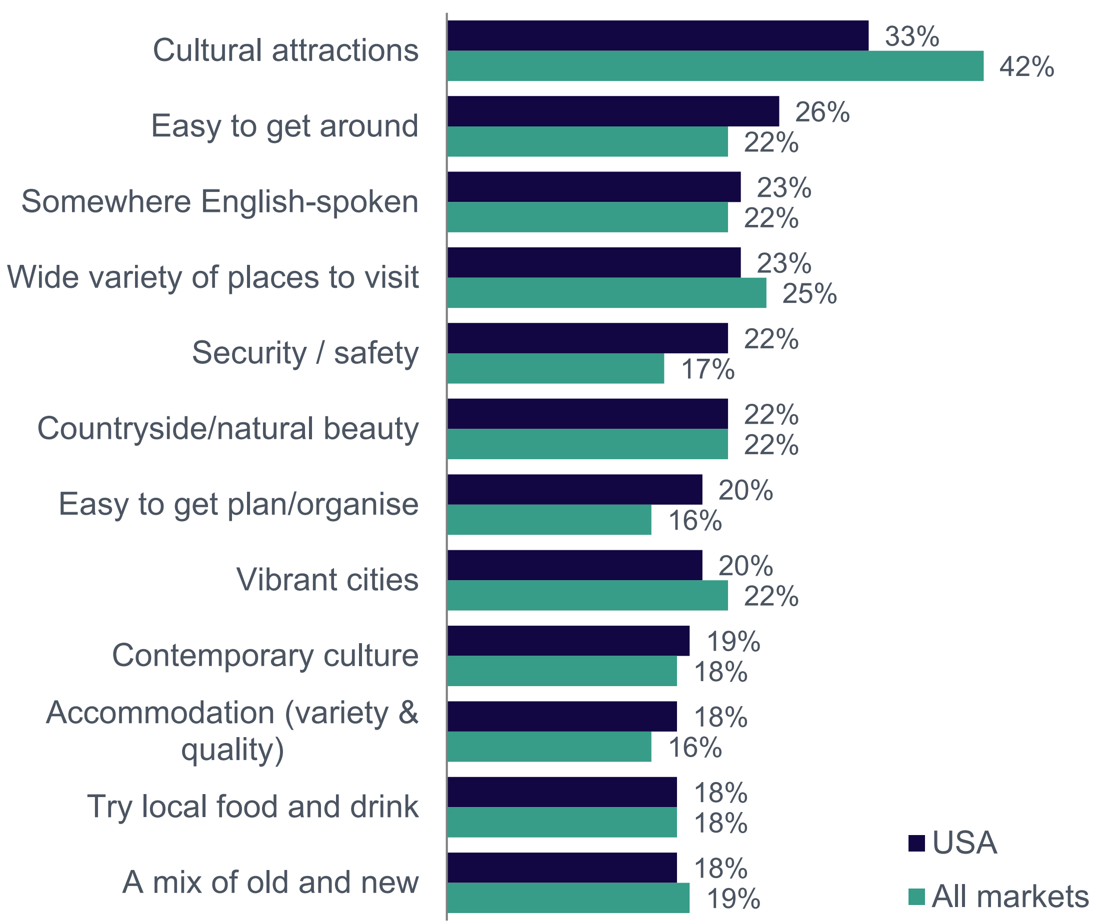
Holiday wants and % saying destination is best place for… bottom 20

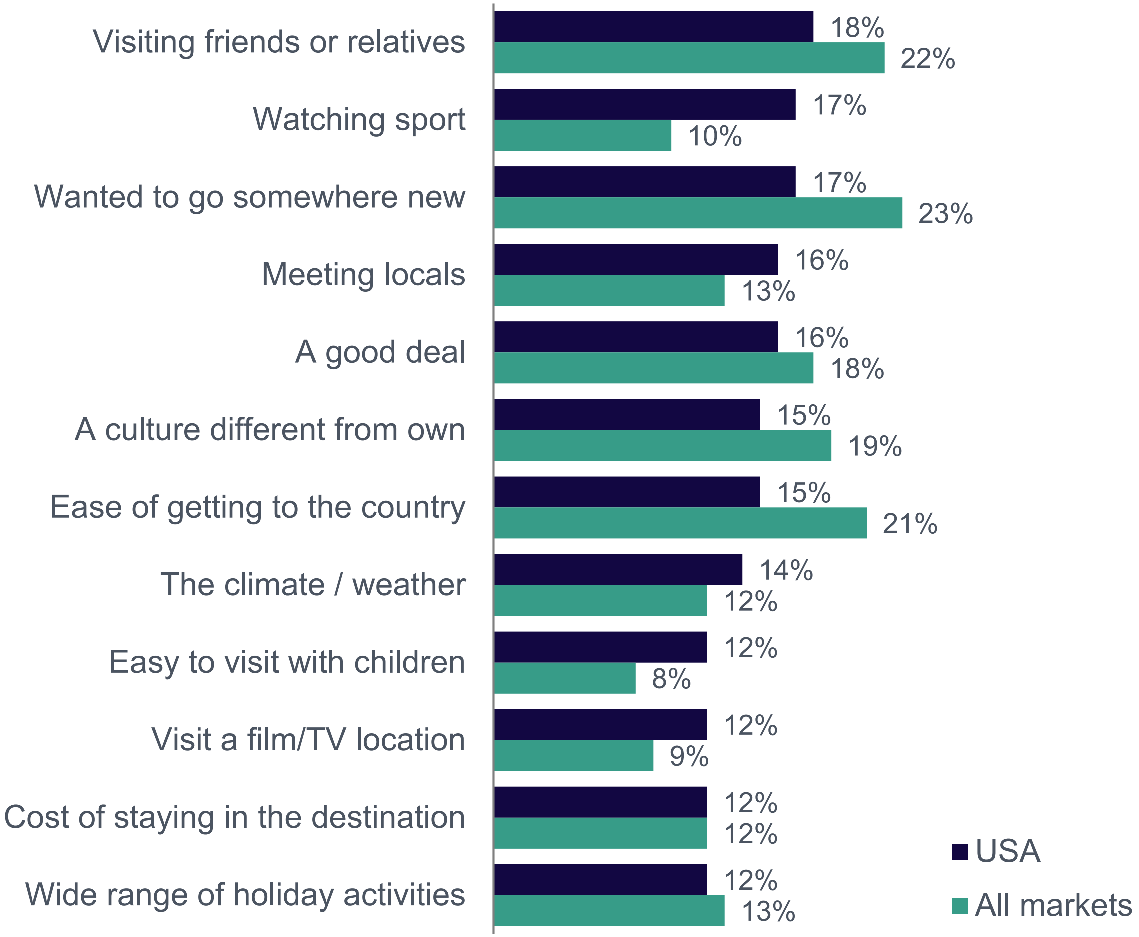
Importance	Perception	GB	FR	IT	AU	GE	NL
5.64	A good place to visit at any time of year	21%	27%	35%	38%	17%	15%
5.63	Easy to get around by public transport	45%	38%	31%	21%	29%	21%
5.59	Be physically healthier	24%	28%	32%	41%	22%	26%
5.55	Get some sun	11%	17%	25%	45%	8%	8%
5.42	Feel connected to nature	19%	14%	30%	53%	11%	24%
5.36	Revisit places of nostalgic importance to me	27%	25%	23%	14%	27%	6%
5.31	Get off the beaten track	29%	18%	21%	51%	17%	8%
5.29	Feel special or spoilt	25%	43%	38%	31%	12%	14%
5.23	Good shopping	36%	56%	59%	27%	26%	13%
5.17	Meet the locals	15%	15%	29%	39%	14%	11%
5.17	Visit places important to my family's history	36%	23%	28%	19%	26%	14%
4.96	Experience adrenalin filled adventures	18%	23%	32%	65%	28%	14%
4.89	Go somewhere that provided lots of laid on entertainment/nightlife	43%	45%	48%	41%	36%	34%
4.85	Meet and have fun with other tourists	47%	14%	37%	39%	33%	18%
4.76	To participate in an active pastime or sport	19%	21%	31%	31%	11%	13%
4.65	Do something environmentally sustainable/ green	6%	27%	21%	49%	23%	14%
4.59	Party	30%	38%	28%	36%	41%	25%
4.54	Watch a sporting event	29%	27%	36%	24%	25%	10%
4.53	Fashionable destination	30%	62%	57%	26%	19%	15%
4.32	Do something useful like volunteering to help on a project	42%	36%	31%	35%	33%	30%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (6)

Motivations for choosing Britain as a holiday destination



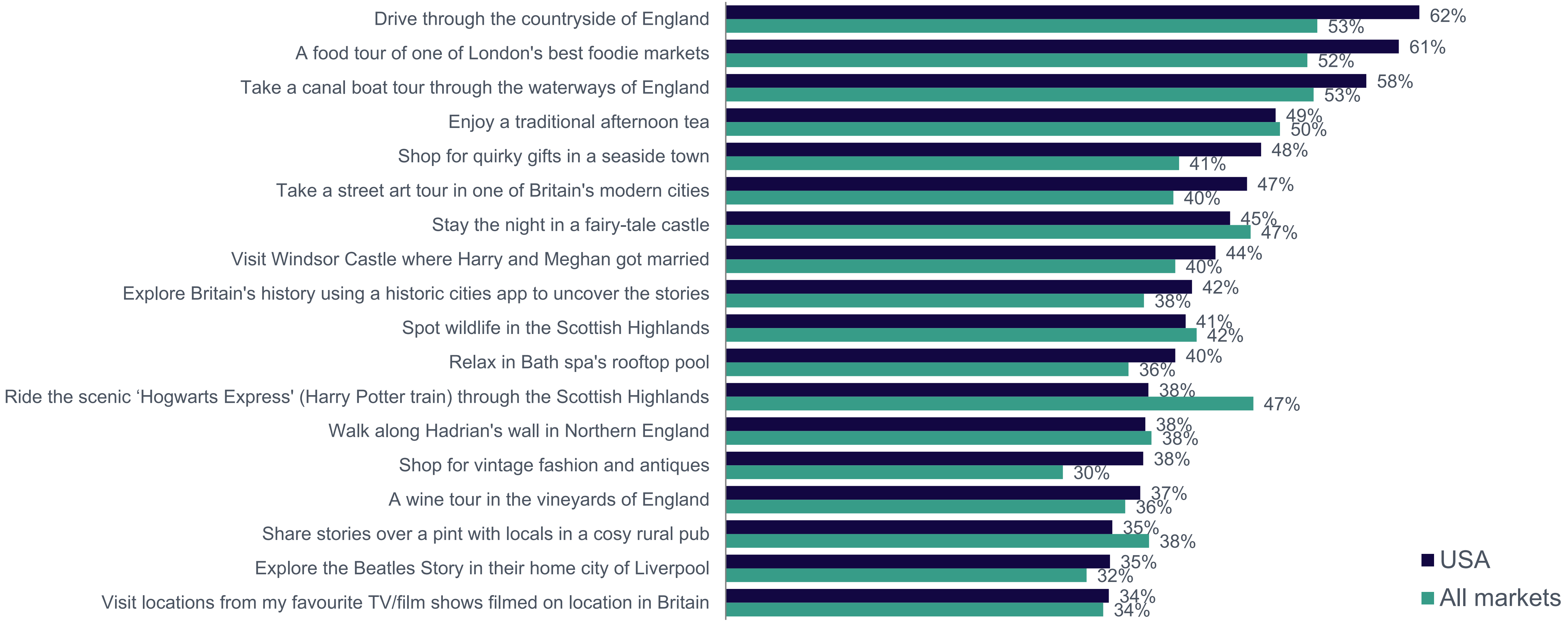


Source: VisitBritain/IPSOS 2016, adjusted data, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

VisitBritain VisitEngland

2.3 Perceptions of the UK (7)

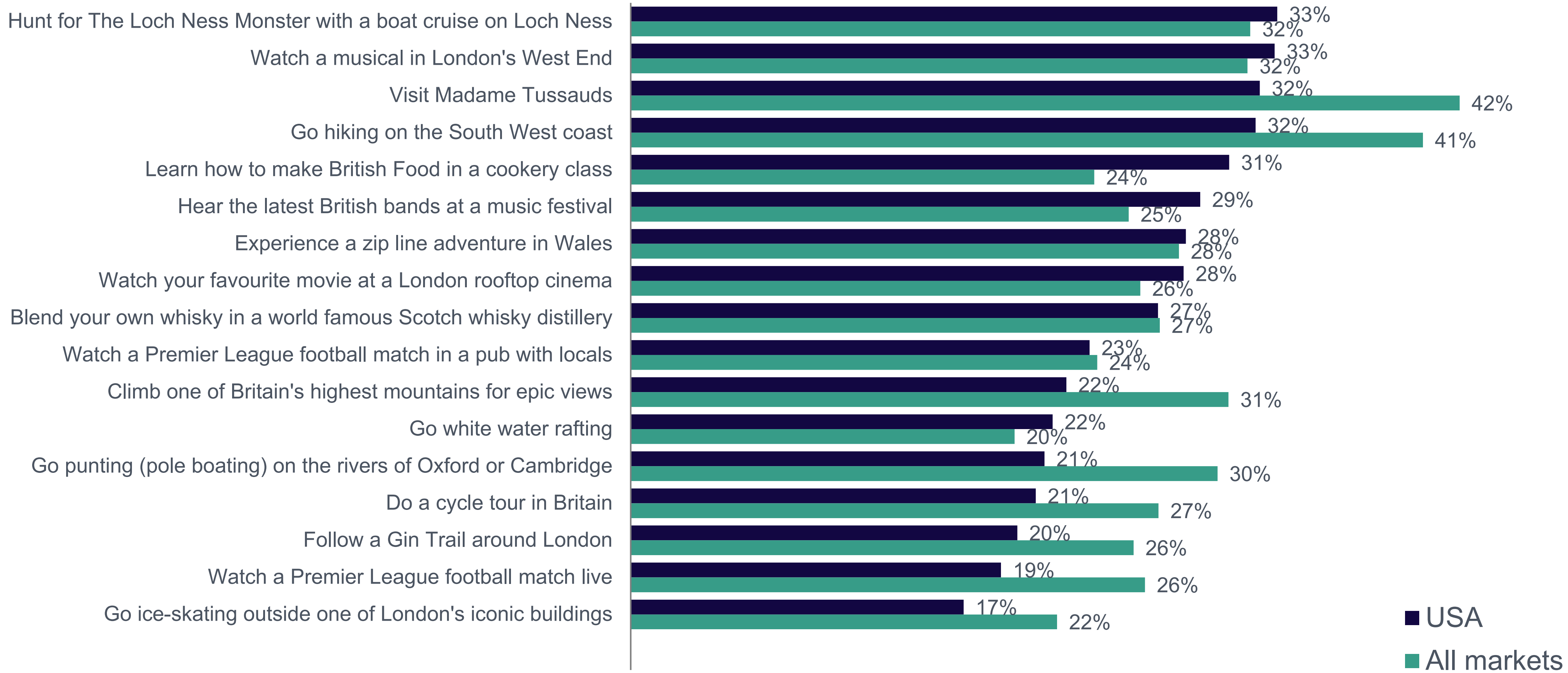
Sought-after Britain activities – top 18



Source: Anholt Nation Brands Index, powered by Ipsos 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets

2.3 Perceptions of the UK (8)

Sought-after Britain activities – bottom 17



Source: Anholt Nation Brands Index, powered by Ipsos 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets

Understanding the market

Chapter 3

3.1 Structural drivers

- With a population of around 332 million (as of November 2021), the USA is the third most populated country in the world, behind China and India. Results of the 2020 census showed that the 2010s saw the second-lowest population growth in US history, after the Great Depression. The population is expected to increase 5% by 2030, according to Oxford Economics.
- By total area, the USA is the 3rd largest country in the world, comprising of 50 states and a federal district covering 6 time zones.
- The most populated states in the USA are California, Texas, Florida, New York and Pennsylvania.
- English is the first language of 78% of Americans followed by Spanish (13%) and Chinese (1%).
- In 2019, 146.8 million valid American passports were in circulation which equals about 44% of the American population. The number of valid US passports in circulation has increased, with an annual average growth over the past decade of 4%. This implies that more and more Americans are able to travel abroad.
- Since mid-2020 the US dollar has fallen in strength against the pound, making it less affordable for Americans to travel to Britain.

332m
USA
Population

Source: Oxford Economics 2021 forecasts, CIA World Factbook 2021, travel.state.gov, US Census 2020, Census.gov , Bank of England

3.1 Structural drivers: economic indicators

Economic indicators (%)

Indicator	2019	2020	2021	2022
Real GDP growth	2.3	-3.4	5.7	4.4
Real consumer spending growth	2.2	-3.8	8.0	4.3
Unemployment rate	3.7	8.1	5.4	3.8

Measure (2021)	USA
Population	332.2
GDP per capita PPP (US$)	61,247
Annual average GDP growth over past decade (%)	2.0
Annual GDP growth (%)	5.7

- The economy of the US is a highly developed mixed economy. It is the world's largest economy by nominal GDP and the second-largest by purchasing power parity (PPP) behind China.
- Many Americans enjoy a high standard of living with GDP per capita in purchasing power parity terms of over US$61,247, forecasted to increase in the years to come. USA has the world's eighth-highest per capita GDP (nominal) and the twelfth-highest per capita GDP (PPP).
- The impact of COVID-19 saw a dip to the economy in 2020; however, the US experienced a summer boom in 2021, fuelled by reduced virus fear, steady household incomes and elevated savings.
- As of 6 December 2021, Oxford Economics expects the US economy to be on a path to recovery which saw a upward revision of GDP growth for 2021 to 5.7% and GDP growth prospects of 4.4% in 2022.
- Employment growth and consumer spending also took a hit in 2020 with forecasts to rise as the US recovers from 2020. Risks in the next year depend on the vaccine rollout and its effectiveness against new strains.
- Capgemini's World Wealth Report suggests that the USA has by far the highest number of High Net Worth Individuals (HNWI), 6.6 million in 2020; these are defined as people with investible assets worth more than $1 trillion. This group grew by 11.3% compared to the previous year.

Source: Oxford Economics 2021, IMF, Capgemini World Wealth Report 2021

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure	2021
Total population (m)	332
Overall growth rate vs 2019	0.5%
Net No. migrants per 1,000 population in 2021	3.03
Average annual rate of population change in 2015-2020	0.6%

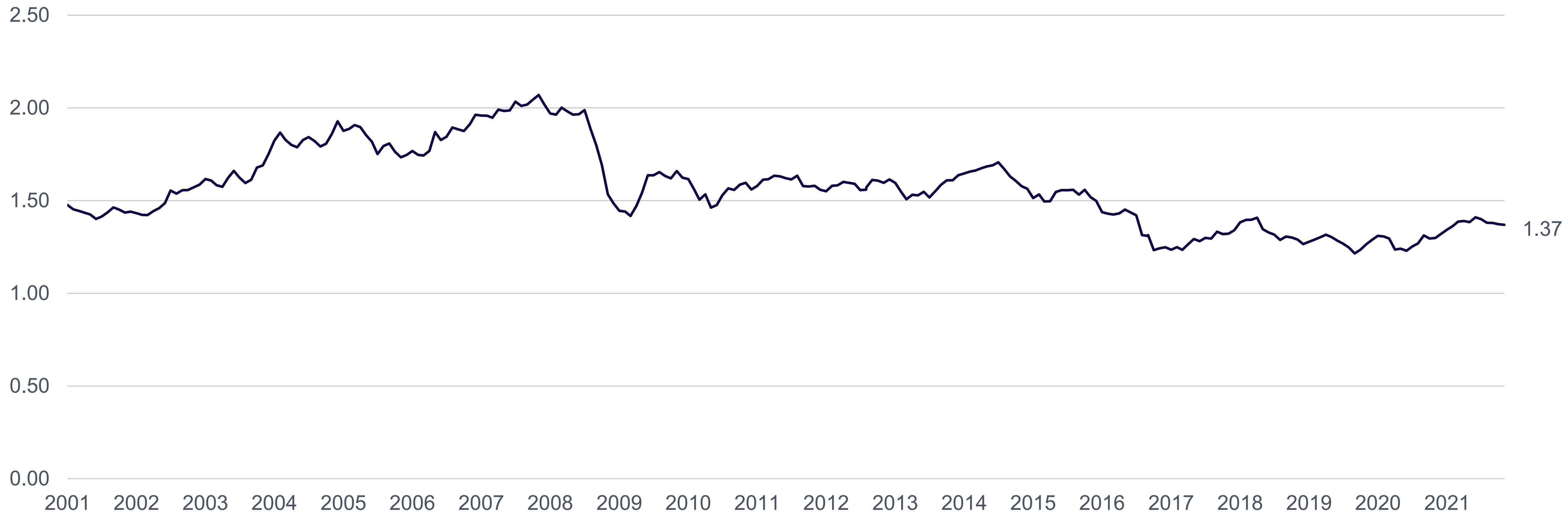
Indicator	1980	2015	2030	2050
Median age (in years)	30.0	37.6	39.9	42.7

- With 332 million inhabitants, the USA is the third most populated country, with a median age of 37 which is expected to increase to 42 years old by 2050. Immigrants and their U.S.-born descendants are expected to provide most of the U.S. population growth in the decades ahead.
- In 2020, there were 51 million migrants resided in the US, which was equal to 18% of the world's total migrants population.
- Whilst 60% of the population is White, Hispanics accounted for 19% in 2019 (around 60.6 million Hispanics), making this the nation's largest ethnic minority.
- In 2021, the urban population represented 83% of the total population. The major urban areas comprised of New York, Los Angeles, Chicago, Houston, Dallas and Washington DC.
- In 2019, 88% of the population graduated from high school, with only 30% achieving bachelor degrees or above. The average American is therefore not likely to hold a degree, but is likely to have attended college for some time and has graduated from high school. Overall, educational attainment serves as the perhaps most essential class feature of most Americans, being directly linked to income and occupation.

Source: Oxford Economics, CIA World Factbook 2020, United States Census Bureau, UN International Migration Report 2020, UN World Population Prospects 2019, US Census (Education attainment and Median Age).

3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in USD)



Please find the most up-to-date exchange rate trend based on monthly averages on our website.

Source: Bank of England

3.2 Consumer trends (1)

- The US is the only advanced economy in the world that does not guarantee its workers paid annual leave. US workers on average receive around 10 days of paid holiday each year. This annual leave is often accrued, meaning US staff will need to be working in their role for 12 months before they are entitled.
- Despite this, the number of outbound visits from the USA increased with an annual average growth from 2010-2019 of 6%. Driving factors for the growing outbound travel market was economic growth, which boosted consumer confidence across this time. In 2019 Americans took more overnight trips overseas than any other country in the world with 128 million taken by U.S. citizens, up 8% on 2018.
- Due to COVID-19 Americans took 71% fewer outbound trips in 2020, with trips abroad expected to fall 67% by the end of 2021, relative to pre-pandemic levels of 2019. The volume of holiday trips abroad was particularly affected, with a boost in domestic tourism experienced as Americans stayed closer to home.
- Domestic leisure travel continues to underpin the US travel recovery with trip numbers just 1% below 2019 levels in 2021, with full recovery expected in 2022. Domestic airline bookings and hotel occupancy are also reported to be approaching pre-pandemic levels.
- VisitBritain's research demonstrates that there continues to be a pent up demand for overseas travel amongst American travellers, with 80% intending to take an international leisure trip in next 12 months. Two in three are also intending to travel internationally as soon as they get the vaccine.

80%

of Americans are keen to travel internationally in the next 12 months

Sources: Oxford Economics – Global Travel service (Oct 2021), CBNC Expedia, VB TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021

3.2 Consumer trends (2)

Travel trends

- The pandemic has driven a number of key changes in behaviour and preferences amongst American travellers.
- Domestically, holiday preferences has shifted towards mountains and coastal destinations over city breaks. 2021 has seen a dramatic rebound in visitors to US national parks too. A greater emphasis amongst American travellers is on nature and outdoor activities. Since seeing a major drop-off in visitors in Spring 2020, the National Park Service in the US has experienced a strong rebound.
- With an estimated 71% of Americans working remotely, longer stay holidays are likely to gain in popularity. VB research demonstrates that 60% of Americans are intending to take fewer, but longer holidays and 52% agree they will have more annual leave to take in 2021 due to COVID restrictions.
- More than half of Americans state that they will think more about sustainability and the environmental impact when planning a future holiday. The youngest age groups show the strongest intention to change their behaviour, especially those under 45 years.
- Triggers to booking international trips have changed throughout the pandemic with an observed shift attitudinally from one of purely health-centric to money-centric focus. This may change over time as the impact of new variants develop.
- The top three activators which make it more likely that Americans would take a leisure trip abroad are money back guarantees in case there is a need to cancel the trip, a significant decrease in coronavirus cases at destination and a high level of the destinations population being vaccinated.
- With regards to international trip activities, many pre-pandemic interests still hold a strong preference including history and heritage and visiting iconic tourist attractions, which continue to be strengths of Britain. Many Americans still remain cautious however with avoiding crowds and enaging outdoor activities key consierations on thier next international trip.

Source: National Travel & Tourism Office 2019, Oxford Economics, Forbes, VB TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021

3.2 Consumer trends: impact of COVID-19

The impact of COVID-19 on American travel behaviour

- 2020 saw an estimated 79% year-on-year decline in volume and 78% decline in value of visitation from the US to the UK as a result of the COVID-19 pandemic.
- The third wave of VisitBritain's international recovery sentiment tracking research reveals: 80% of Americans considered taking an international leisure trip in the next 12 months (fieldwork 23rd August – 6th September 2021), showing the strongest desire to travel since the start of the tracker. Of them, 52% are considering Europe, with on average 2-3 destinations on their mind, with 9% considering Britain.
- Britain ranks 4th for consideration of American travellers hoping to go on a European leisure trip, falling one place and losing significant share of consideration vs results from wave two in spring 2021. The UK currently sits behind France, Italy and Germany, ahead of Spain, Greece and Austria, with significant delays to opening UK borders to the US likely a driving factor to the change in competitor rankings.
- Once vaccinated, 62% aim to travel internationally and almost nine in ten are happy to take a pre-trip COVID test if required. Booking direct with the travel or accommodation provider is the most popular choice for their next trip, with 55% of those keen to travel having not yet chosen the destination or booked their trip. Travel concerns of around eight in ten of Americans centre around the worry that others around them may not follow COVID-19 policies/procedures and a similar proportion note access to healthcare is a key concern. Fears around having a limited or restricted experience while on their leisure trip and the possibility of changes to quarantine policies were worries for around three in four.

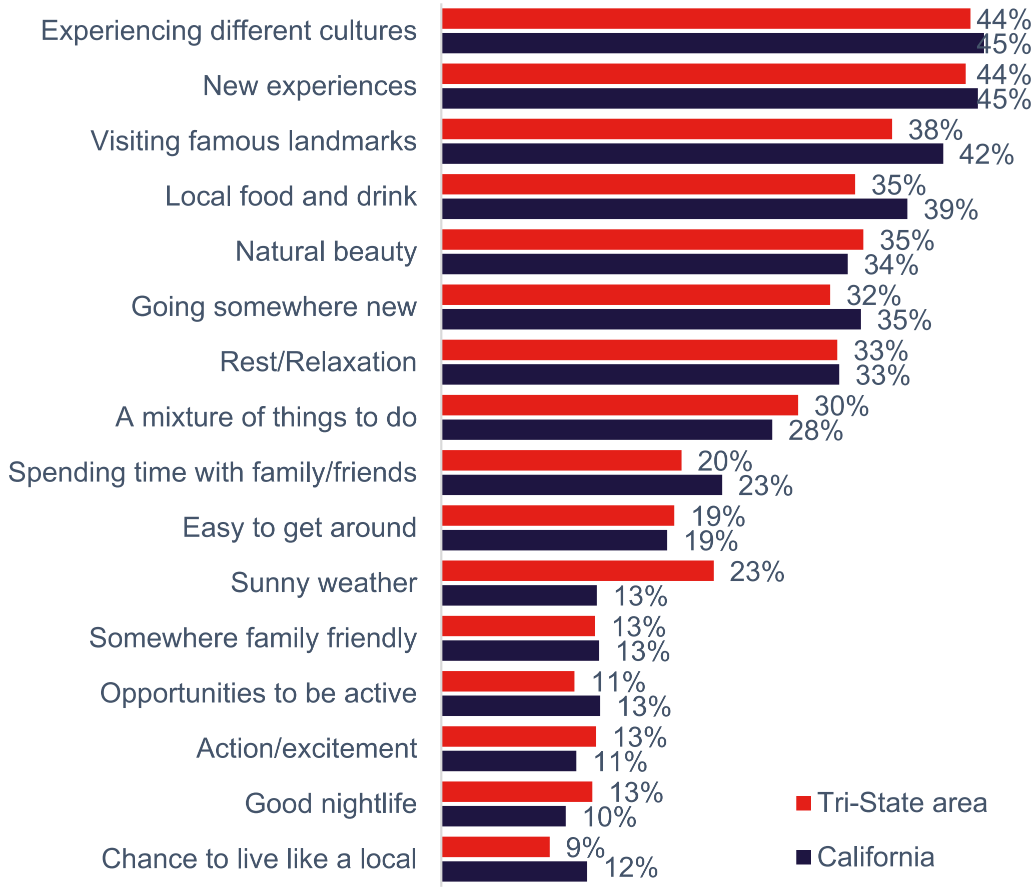
Key activators for an international leisure trip	USA	All markets
Money-back guarantee should one wish to cancel the trip	35%	35%
Decrease in coronavirus cases at destination	35%	31%
High proportion of destination population being vaccinated	32%	25%
Hygiene & safety protocols in place at destination	31%	26%
Receiving a COVID-19 vaccination	26%	23%

Source: Oxford Economics/VisitBritain, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves

3.2 Consumer trends: reasons for holidays

Most important things to look for in an international vacation (%)

- The top US states for UK visits can be found on the west and east coasts of the USA. New York (18%) represents the largest state by volume followed by California (17%).
- There are few significant differences in vacation motivations between these 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.
- Vacation activities: those in the Tri-State area are more likely to want to sunbathe or visit a spa / get pampered. 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 groups when choosing a destination.



Source: VisitBritain US East vs West Coast Consumer Research, 2017. Results above 10% total agreement shown. Based on quantitative research among residents in California or the Tri-State area who: have taken a vacation of two nights or more to a foreign country in the last three years (beyond Mexico and Canada); are decision makers when choosing vacation destinations; have either visited Britain in the last three years or are a non-rejecter of visiting Britain in the next five years.

3.3 Booking and planning

- A large proportion of American holiday visitors tend to start thinking about their trip early with 60% doing this as early as half a year or more in advance.
- 31% of travellers booked in the three to six months window before the arrival to Britain. A quarter of travellers booked last-minute (within one month before arrival).
- The majority of the American travellers to Britain book travel and accommodation together, mostly online. They are also more likely than the average visitor to purchase tickets for tourist attractions and guided sightseeing tours prior to their trip.
- Since the onset of COVID-19 there has been a notable shift in consumer behaviour with regarding to leisure trip booking and planning. There has been a notable increase in short lead times due to uncertainty around travel restrictions, changes to border policies, emergence of COVID-19 variants and spikes in cases, both in leisure destinations and within the US. The favour towards last minute booking is confirmed through VisitBritain and partners' recent consumer sentiment tracking research.

60%

of American visitors start thinking about their trip 6+ months before their trip to Britain

Source: VisitBritain/IPSOS 2016

3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked

Booking method	USA	All markets
Online	83%	85%
Face-to-face	13%	10%
By phone	5%	4%
Don't know	0%	1%

- Most Americans book their trip to Britain online, especially when they book their transport (i.e. travel). The majority of online bookings are made via a laptop/desktop.
- American visitors to Britain still tend to book their travel and accommodation together (70% of visitors). About one in four bookings were made face to face for these holiday packages. This is similar to the global average of 27%.

How trips to Britain were booked: accommodation only

Booking method	USA	All markets
Online	66%	70%
Face-to-face	11%	7%
By phone	8%	3%
Did not book/stayed with friends/relatives	15%	17%
Don't know	0%	2%

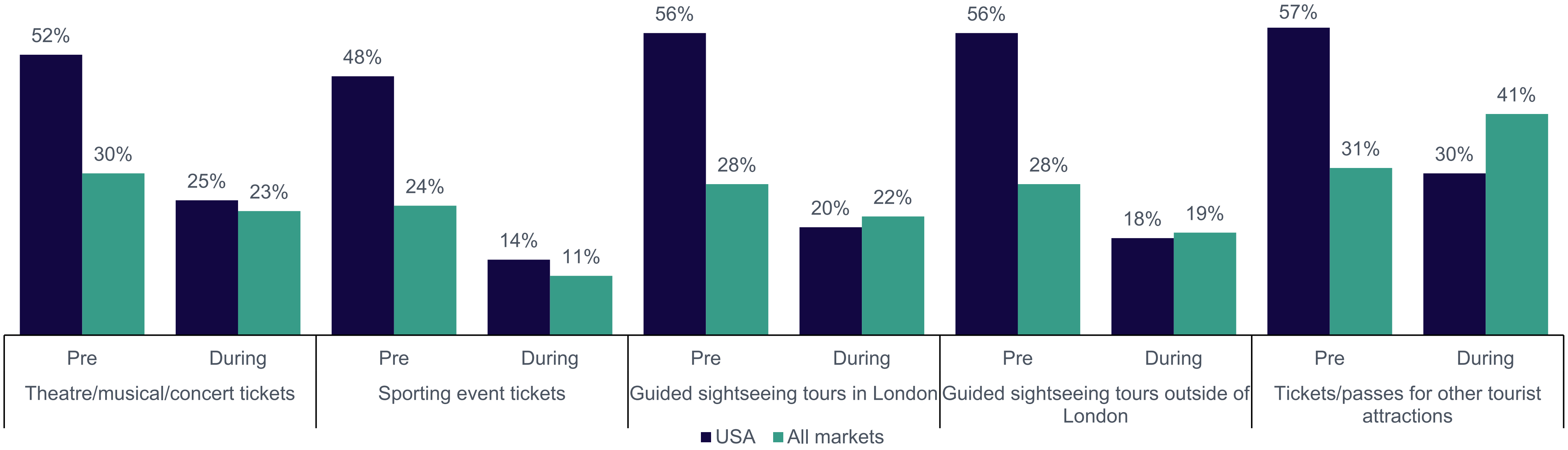
How trips to Britain were booked: travel + accommodation

Booking method	USA	All markets
Online	58%	64%
Face-to-face	24%	27%
By Phone	17%	8%
Don't know	0%	1%

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: booking channels and ticket sales (2)

Propensity to make a purchase before or during trip



- Many American visitors book holiday activities before they start their journey, especially for tickets to guided sightseeing tours and to miscellaneous tourist attractions.
- Various tickets are also booked during the trip by American visitors, with theatre/musical/concert and sporting event tickets more likely than the average to be purchased during a trip.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: lead-times (1)

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	USA	
6+ months	60%	45%
3-6 months	21%	31%
1-2 months	10%	13%
Less than 1 month	7%	5%
Don’t know	2%	3%

Deciding on the destination

Lead time	USA	All markets
6+ months	37%	32%
3-6 months	36%	38%
1-2 months	15%	19%
Less than 1 month	9%	7%
Don’t know	3%	3%

Looking at options/prices

Lead time	USA	All markets
6+ months	28%	21%
3-6 months	32%	37%
1-2 months	22%	27%
Less than 1 month	14%	12%
Don’t know	4%	4%

Booking the trip

Lead time	USA	All markets
6+ months	20%	14%
3-6 months	31%	32%
1-2 months	17%	28%
Less than 1 month	25%	21%
Don’t know	7%	5%

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: lead-times (2)

Decision lead-time for visiting Britain: commentary (see tables on previous slide)

- American travellers to Britain show a slightly higher tendency to start thinking earlier about their trip than the all market average.
- Six in ten of the American visitors tended to start thinking early about their trip to Britain, i.e. half a year or more in advance of their journey; 21% did this three to six months in advance.
- 37% made their decision to travel to Britain longer than six months before the actual journey, another 36% made their decision three to six months before departure.
- Almost one third of American visitors looked at options and prices between three and six months ahead of the trip and an almost equal share booked their trip in that same time frame.
- While over half of Americans booked their trip over 3 months before travelling, 1 in 4 booked their trip to Britain within the month leading up to the departure. They are slightly more likely to do so compared to the all market average.
- Americans are more likely to book directly with the airline / train / ferry operator or directly with the accommodation provider than the all market average.

1 in 2 book their trip to Britain more than 3 months before departure to Britain

Source: VisitBritain/IPSOS 2016, base: visitors

3.4 Reaching the consumer

- The most influential source for destination choice for American visitors to Britain is via websites providing traveller reviews of destinations, closely followed by information from search engines and talking to friends, relatives and colleagues.
- Looking at images or videos on social media, using travel apps and viewing general images on online adverts all have a strong influence on destination choice amongst the American market, strongly over-indexing again the all market average[(1)].
- 82% of US adult travellers enjoy researching locations when choosing their destination. Other influential drivers for choice are price (62%), followed by accommodation quality (57%) and advice from friends, family and colleagues (54%)[(2)].
- US adults spent an estimated 13 hours and 21 minutes (13:21) with media in 2020. This is a 58-minute increase from pre-pandemic in 2019. Some traditional media formats like TV saw growth for the first time in years[(3)].
- Usage of Facebook Live streaming grew 27% in 2020 and growth is expected to continue into 2021 with Facebook remaining the largest player in Social[(4)].

Average Time Spent with Media in the US, by Media, 2019-2023
hrs:mins per day among population

	2019	2020	2021	2022	2023
Digital	**6:49**	**7:50**	**7:59**	**8:09**	**8:20**
—Mobile (nonvoice)	3:45	4:16	4:23	4:29	4:35
—— Audio	1:07	1:10	1:16	1:19	1:22
—— Social networks	0:52	1:03	1:03	1:03	1:04
—— Video*	0:42	0:49	0:51	0:53	0:55
—— Other	1:05	1:15	1:13	1:14	1:14
—Desktop/laptop**	1:54	2:03	1:59	1:56	1:56
—— Video*	0:23	0:26	0:26	0:25	0:25
—— Audio	0:16	0:20	0:20	0:20	0:20
—— Social networks	0:07	0:07	0:07	0:06	0:06
—— Other	1:08	1:09	1:06	1:04	1:04
—Other connected devices	1:10	1:30	1:38	1:44	1:49
Traditional media	**5:33**	**5:31**	**5:13**	**4:57**	**4:45**
—TV***	3:27	3:33	3:17	3:02	2:51
—Radio***	1:35	1:28	1:26	1:26	1:25
—Print***	0:19	0:19	0:19	0:18	0:17
—— Newspapers	0:10	0:10	0:10	0:10	0:09
—— Magazines	0:09	0:09	0:08	0:08	0:08
—Other traditional media	0:12	0:11	0:11	0:11	0:11
Total	**12:23**	**13:21**	**13:12**	**13:06**	**13:05**

*Note: ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; *excludes time spent with video via social networks; **includes all internet activities on desktop and laptop computers; ***excludes digital*
Source: eMarketer, April 2021

T11504 eMarketer | InsiderIntelligence.com

Source: (1) VisitBritain/IPSOS 2016, (2) MRI-Simmons, Spring 2021 (3) eMarketer, 2021, (4) Social Media Today, 2020

3.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media

- Each week, linear TV (Live + DVR) reached 168MM viewers 18+ in Q3 2020[1].
- On average in 2020, Americans 18+ watched TV for about 3 hours and 20 minutes (live and DVR). Younger Americans (18 – 34) spent around 2 hours less than those 55+, who watched TV for 5+ hours per day[2]. Despite the uptick in TV viewing due to binge viewing during the pandemic, linear TV is still projected to lose 17MM US adult viewers by the end of 2021.
- Streaming accelerated during COVID-19, with nearly half of all consumers reporting that they subscribed to a new streaming service since the outbreak [3]. Of those, adults 18 – 34 spent +21% more time streaming YoY, and adults 35 – 64 spent +47% more time streaming YoY.
- Connected Devices (CTV) are beating Mobile and Desktop/Laptop as the fastest growing channels in media consumption[2].

Radio

- Radio continues to decline, reaching 212MM listeners in 2020[1], a shift attributed to preference of digital over terrestrial.
- Americans listen to the radio for an average of 1 hour and 28 minutes each day[2].
- Podcasts have grown significantly YoY in the US, reaching a projected 118MM listeners by the end of 2021[2].

Source: (1) Nielsen 2021, (2) eMarketer 2021, (3) OMG Research COVID-19 Custom Research Wave 12*

3.4 Reaching the consumer: magazines and online media

Newspapers

- 28.6MM Americans read at least one daily newspaper in 2020. Only 16% of Americans 18+ receive their news via print[(6)] with circulation decreasing YoY as readers shift to digital editions.
- Daily newspapers with the highest number of circulations in 2020 were USA Today, The Wall Street Journal, The New York Times, and The Washington Post[(2)].

Magazines

- Although readership has declined, AARP The Magazine is still the magazine with the world's largest-circulation with an average of 36MM readers a month as of March 2021[(1)]. Hearst's publications saw a 42% increase in mixed print and online subscriptions by the end of March 2020[(3)].
- Digital magazine downloads saw a 62% increase during peak pandemic, with "home" and "gardening" at the forefront[(4)].

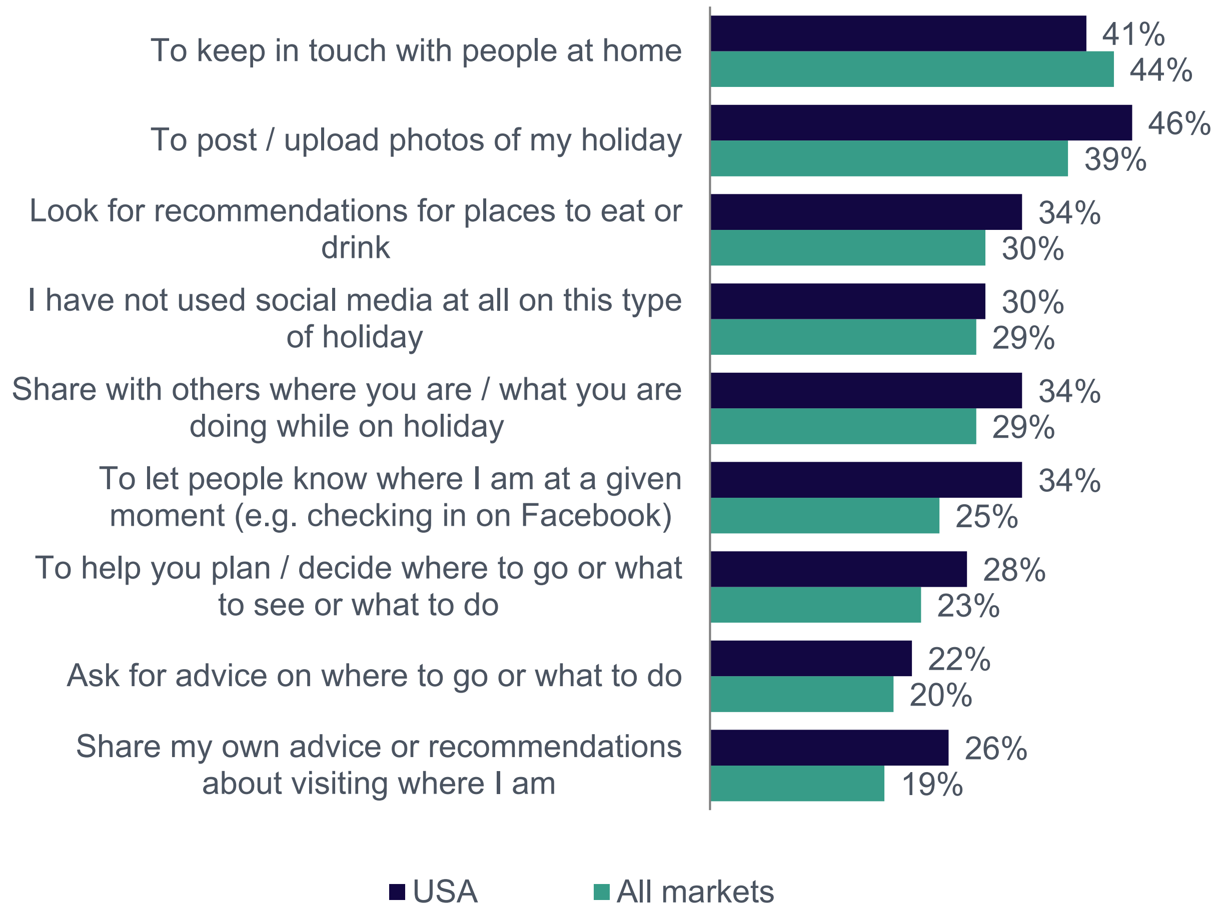
Online media

- US Adults spent a total of 7 hours and 50 minutes on Digital, with 4 hours of that time being spent on mobile (non-voice)[(5)]. Of that, roughly 1 hour each were spent on social, audio and video via mobile and 2 hours were spent on desktop with 1 hour and 30 minutes attributed to other connected devices[(5)]. Digital usage is predicted to continue to trend upwards, driven by mobile usage.
- The social networks with the highest number of monthly active users in the US are Facebook (190MM), Instagram (112MM) and Twitter (74MM)[(2)].
- Digital platforms are expected to overcome the new cookie-less world with the opportunity to utilise clean room data. With 62% of US advertising decision-makers exploring 1P data strategies to lessen the blow of the depreciation of 3P cookies[(5)].

Source: (1) Alliance for Audited Media 2021, (2) Statista 2020 (3) StoraEnso Intl 2020 (4) Forbes 2020, (5) eMarketer 2021 (6) Nielsen 2021

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

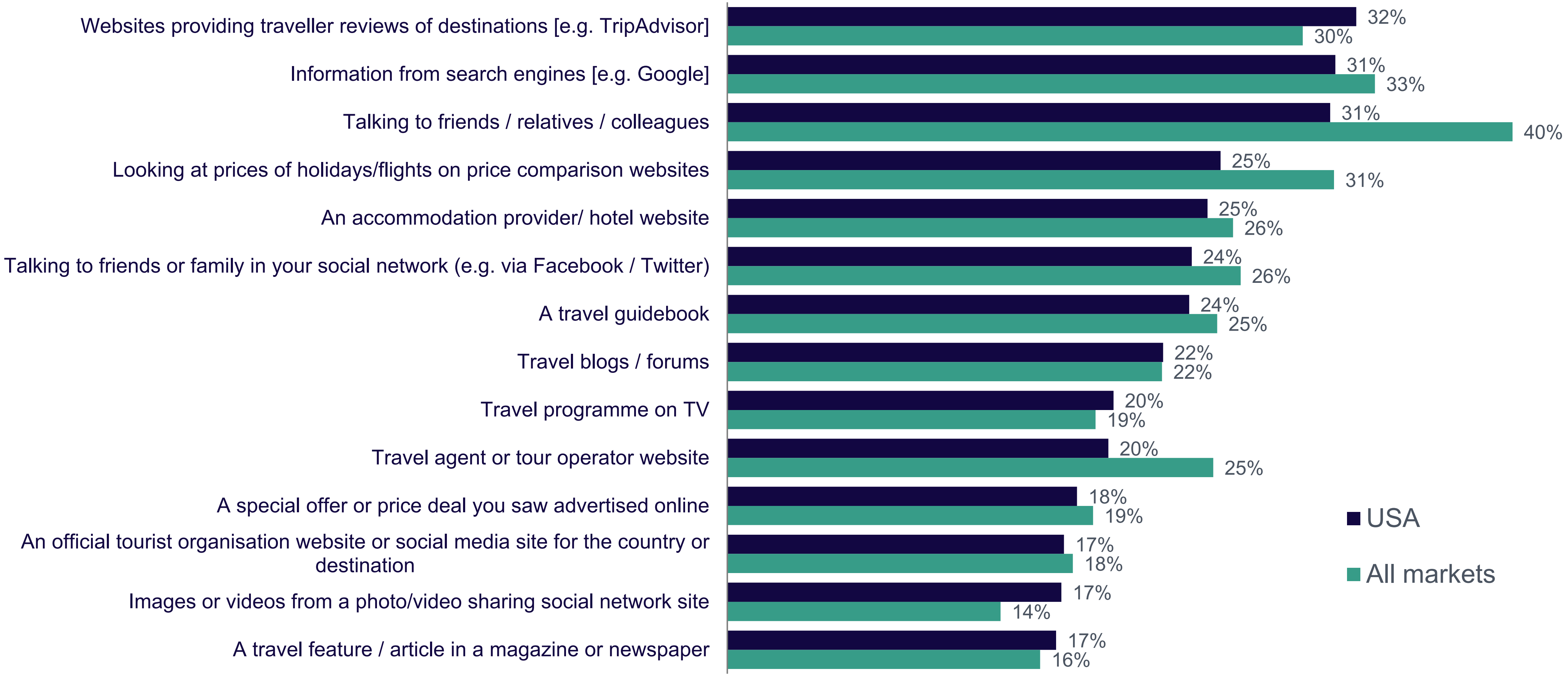


- Staying connected when on a holiday is important for American travellers. 77% like to stay connected whilst they are on holiday and 81% regard a smartphone as essential whilst they are on holiday.
- In general, 64% tend to use the tablet/smartphone for general internet use rather than a laptop/desktop.
- Almost half use social media to post photos and keep in touch with people during their holiday.
- Facebook dominates the social media platforms in the USA in terms of daily usage, followed by YouTube, Instagram and Twitter.
- In general, 53% enjoy writing reviews of places they have been to on holiday on social media and 67% place trust in social media reviews from other tourists which is above average in comparison to other markets.

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?

3.4 Reaching the consumer: influences (top 14)

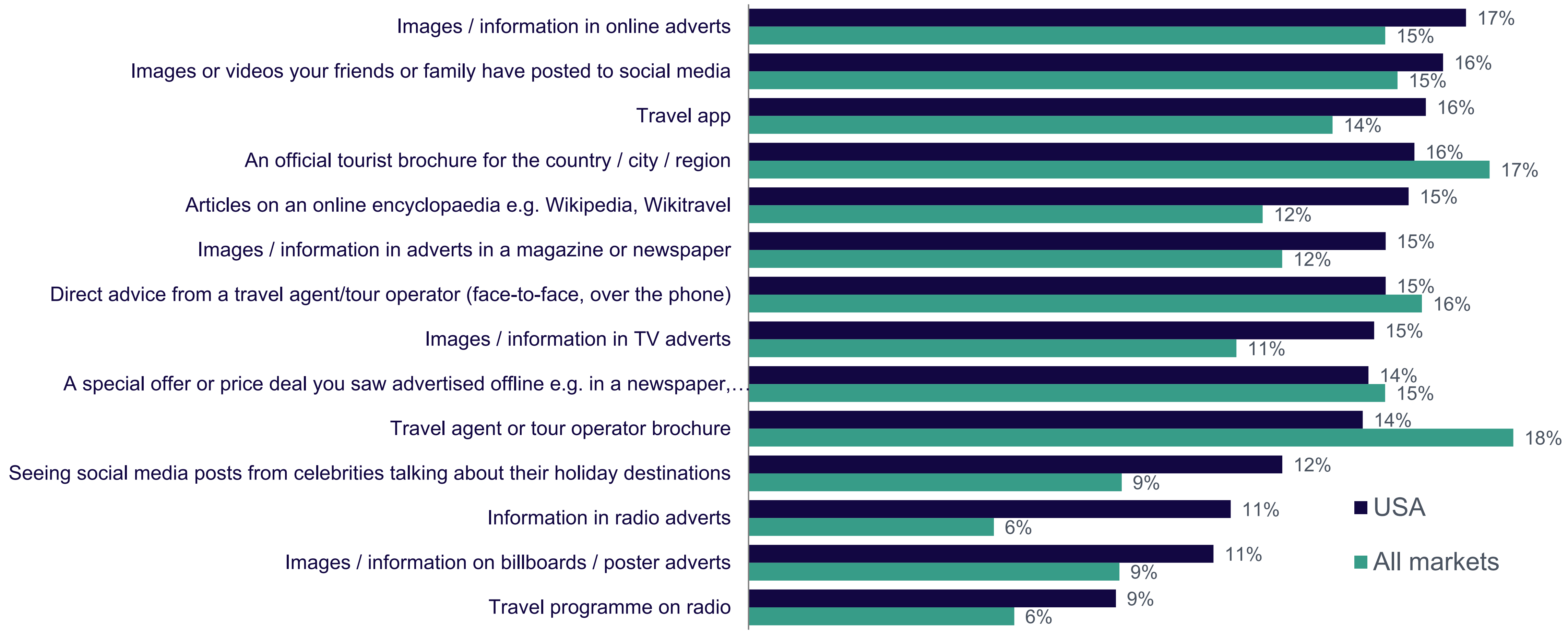
Influences on destination choice – top 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

3.4 Reaching the consumer: influences (bottom 14)

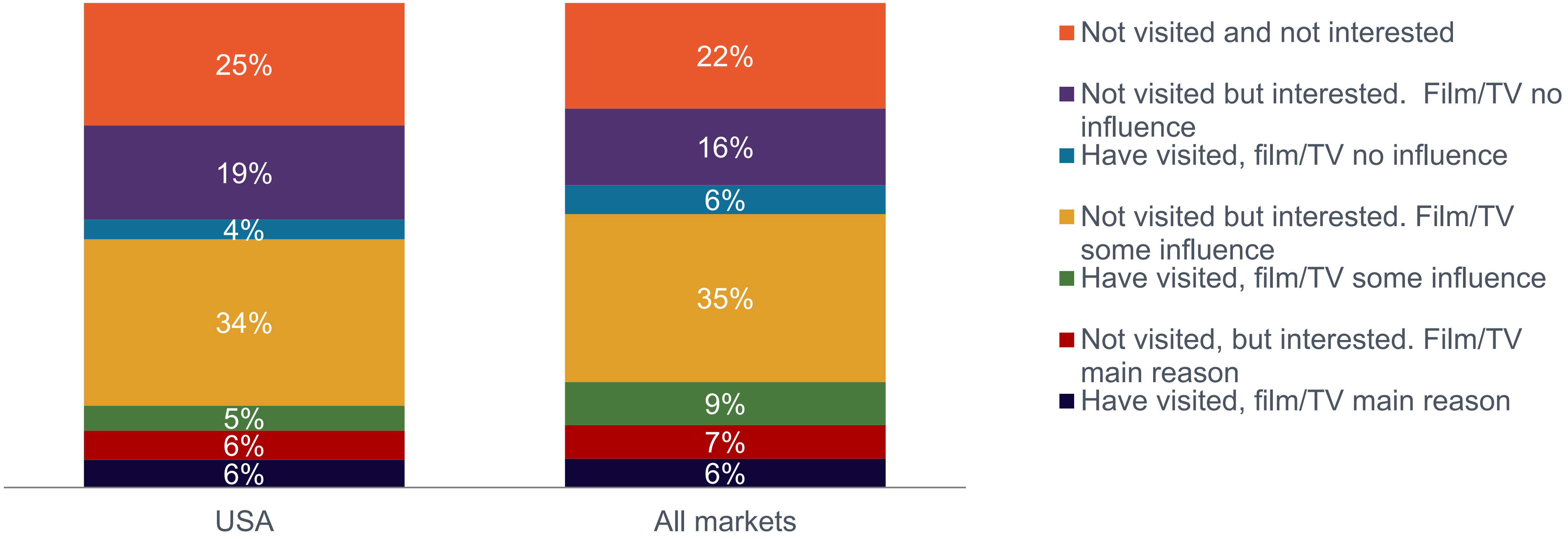
Influences on destination choice – bottom 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

3.4 Reaching the consumer: influences

Likelihood to visit a place featured in a movie, TV series or book



- Around 1 in 3 Americans have not visited a film or TV location whilst in holiday but say they are interested in doing so and say that this attribute would influence their choice of destination.
- Around 25% say they have not visited a film or TV location whilst on holiday and do not have any interest in doing so.

Source: Anholt Nation Brands Index 2017: Have you ever visited a film or TV location whilst on a holiday/vacation abroad? If yes: To what extent was the film or TV location a reason for you choosing to take a trip to that destination? If no but would be interested: To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?

Access and travel trade

Chapter 4

4.1 Access: key facts

- 87% of American visitors travel to the United Kingdom by plane. Another 11% arrive through the Channel Tunnel as part of a multi-country trip and 2% by ferry.
- Three airports in the UK welcome 96% of US direct flights into the UK in 2019. London Heathrow received over 3 in 4 direct flights in 2019 (75%), followed by London Gatwick (14%) and Manchester International (7%).
- American visitors departing Britain by air pay an Air Passenger Duty tax, due to increase in April 2022. Duty will increase £2 to £84 for economy and by £5 to £185 in a premium cabin (Premium economy, business and first class cabins).
- Annual aircraft seat capacity from the USA to the UK had experienced a significant period of sustained growth since the recovery from the financial crisis, with year on year growth recorded annually from 2010 to reach a peak of 258,000 average weekly seats in 2018.The pace of growth slowed to more modest levels in recent years with capacity remaining stable from 2018 to 2019.
- Due to COVID-19, aircraft capacity declined by a significant -70% in 2020 vs 2019. COVID restrictions were in place at the UK borders between March 2020 and August 2021 preventing the majority of US to UK travel across this time and a significant recovery in air connectivity. Its estaimated that as of December 2021 seat capacity for the whole of 2021 will have run at 25% the levels seen in 2019.

87%

of American visitors travelled to the UK by plane in 2019

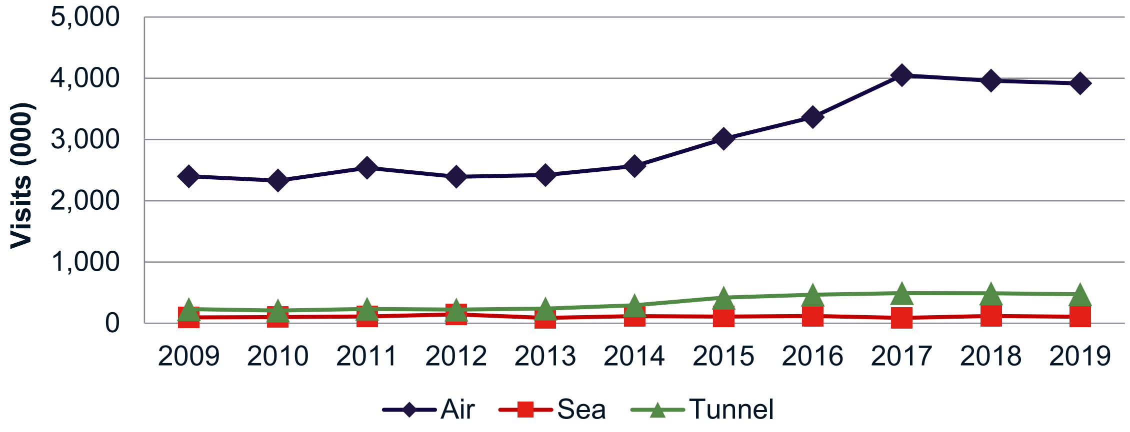
Access to Britain

Measure	2019
Weekly aircraft departures	936
Weekly seat capacity	257,331
Airports with direct routes in the US	36
Airports with direct routes in Britain	13

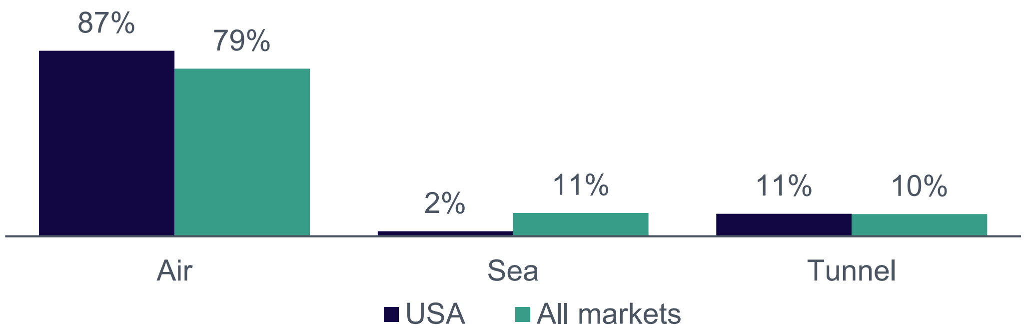
Source: Apex, non-stop flights only, International Passenger Survey by ONS

4.1 Access: mode of transport

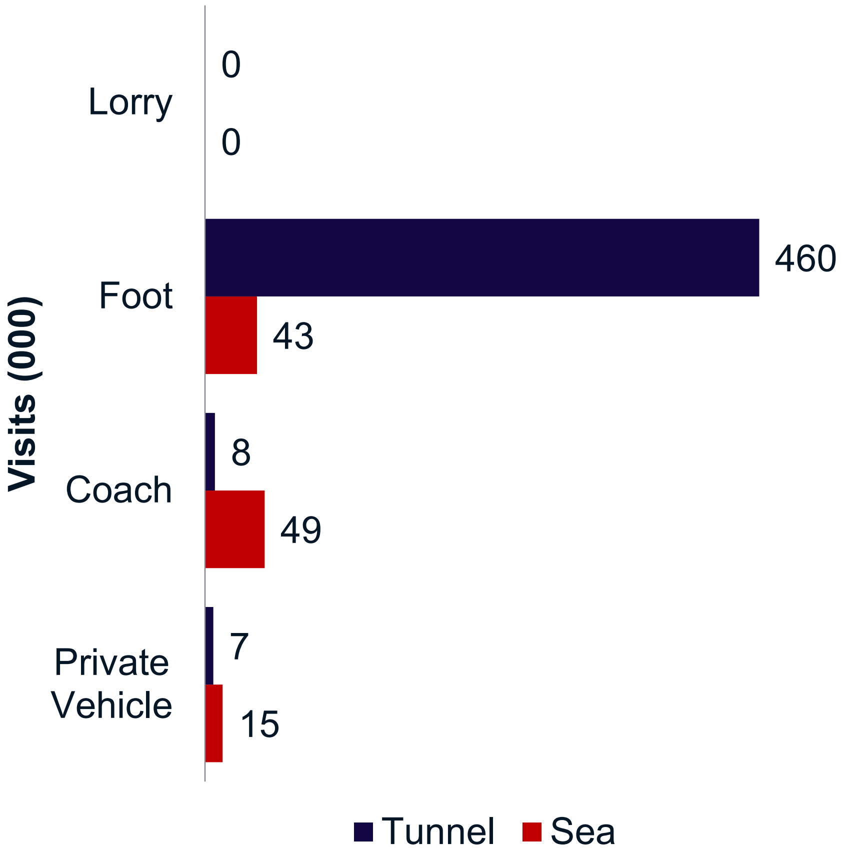
Visits by mode of transport



Annual share by mode (2019)



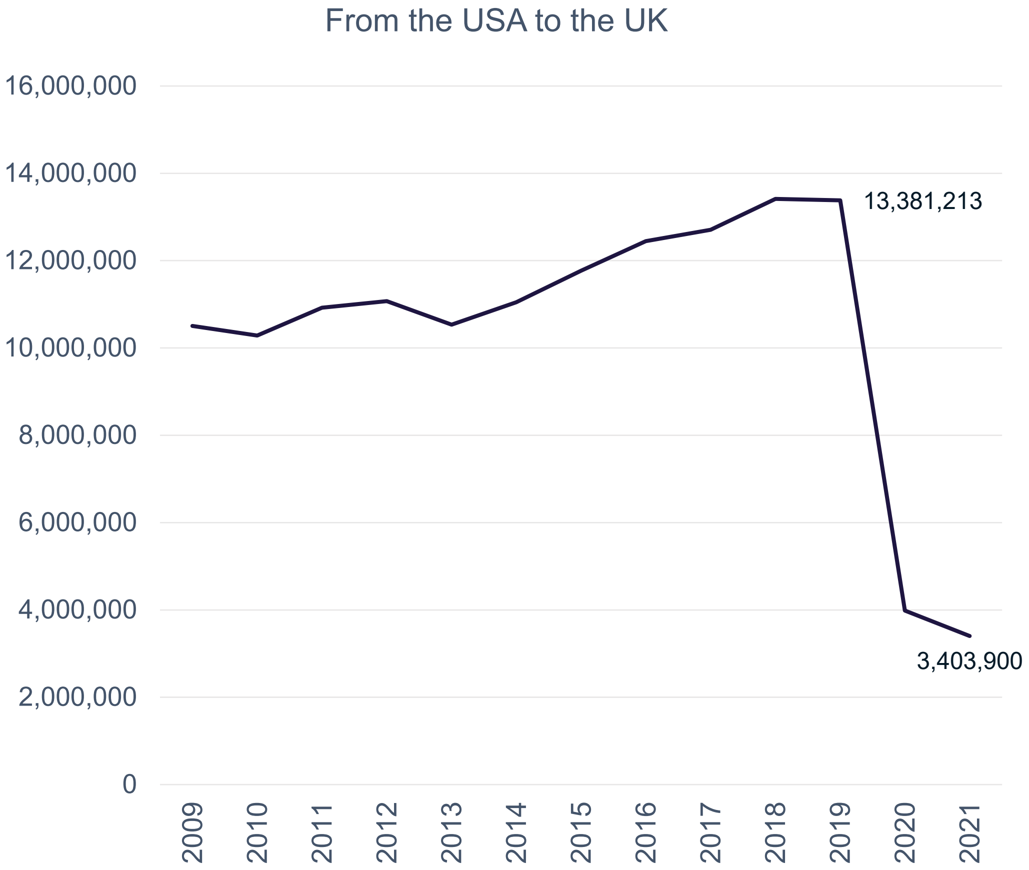
Sea and tunnel travel (000s) in 2019



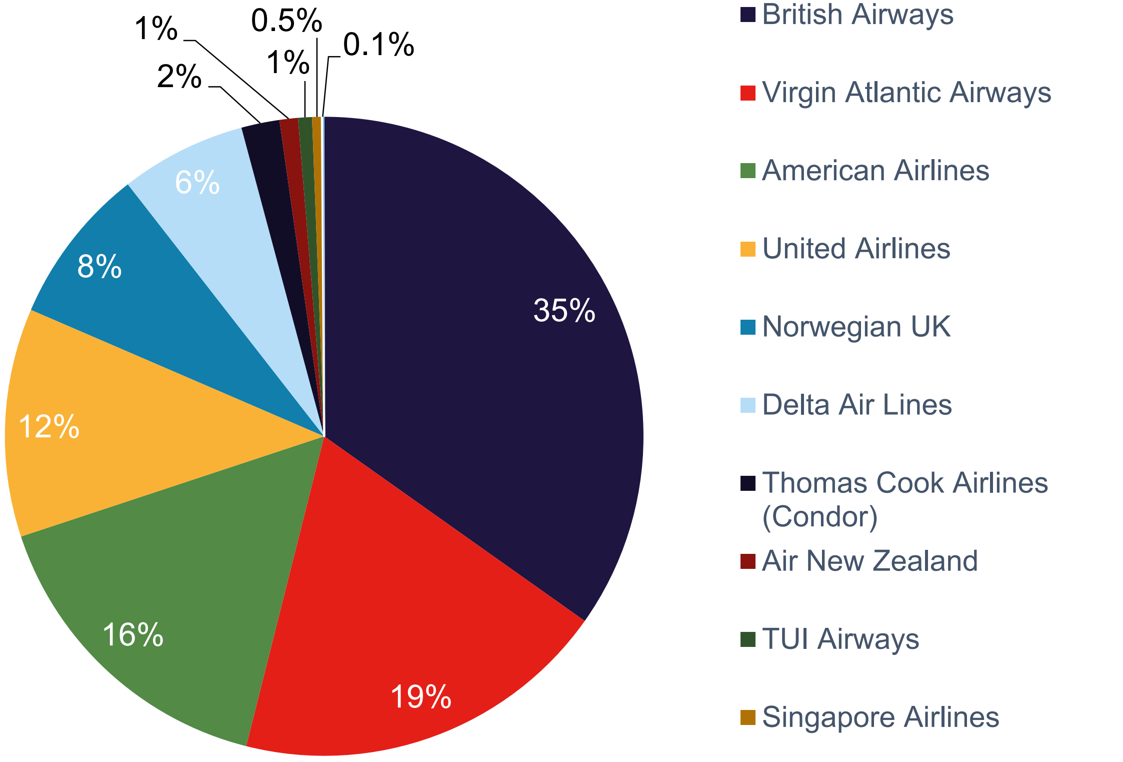
Source: International Passenger Survey by ONS

4.1 Access: capacity (1)

Annual airline seat capacity trends



Airline seat capacity by carrier (2019)

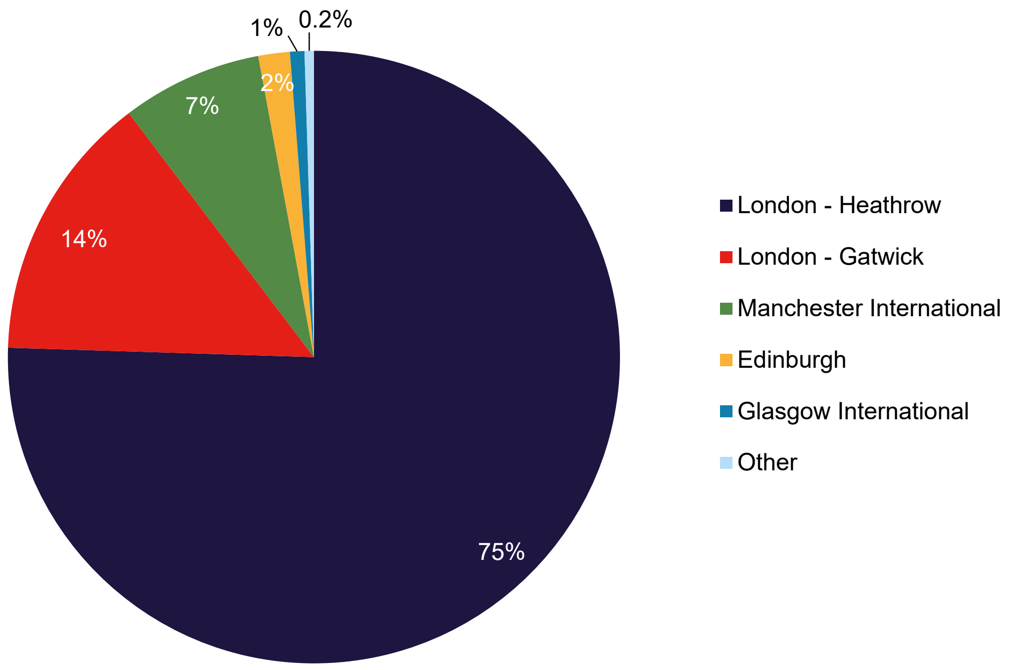


Note: please read the pie chart clockwise

Source: Apex 2021, non-stop flights only

4.1 Access: capacity (2)

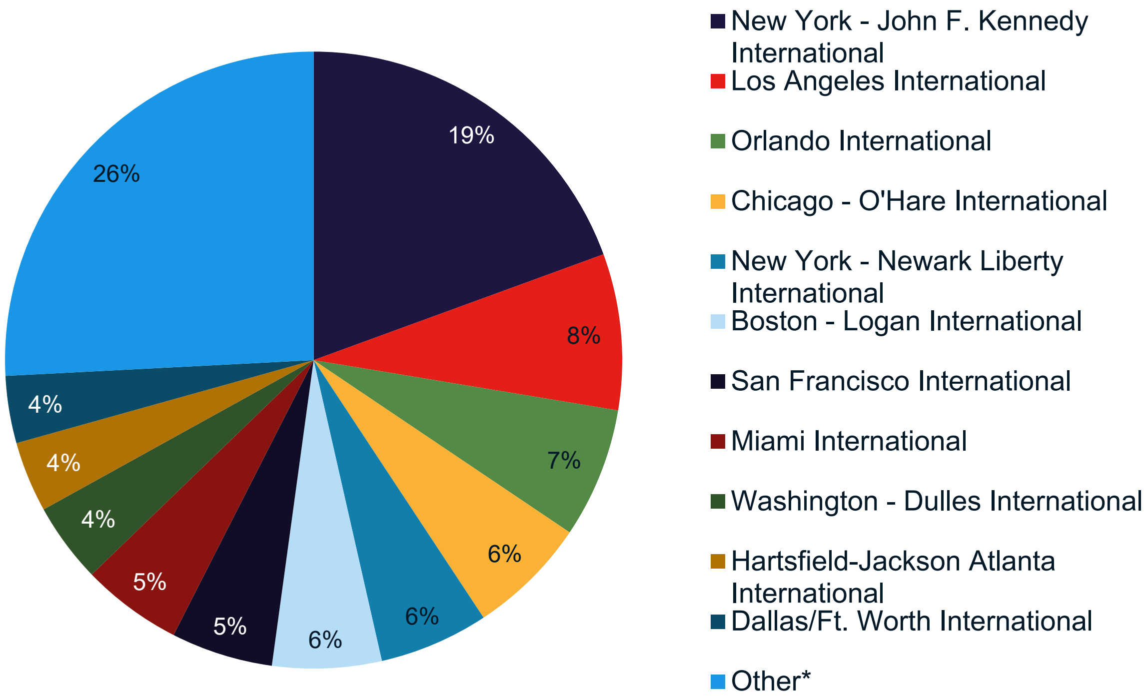
Destination airport seat capacity (2019)



Note: please read the pie chart clockwise

Other in destination airports groups: London City, Belfast International, Birmingham International, Newcastle, Bristol, East Midlands, Doncaster Sheffield and Leeds/Bradford

Origin airport annual seat capacity (2019)



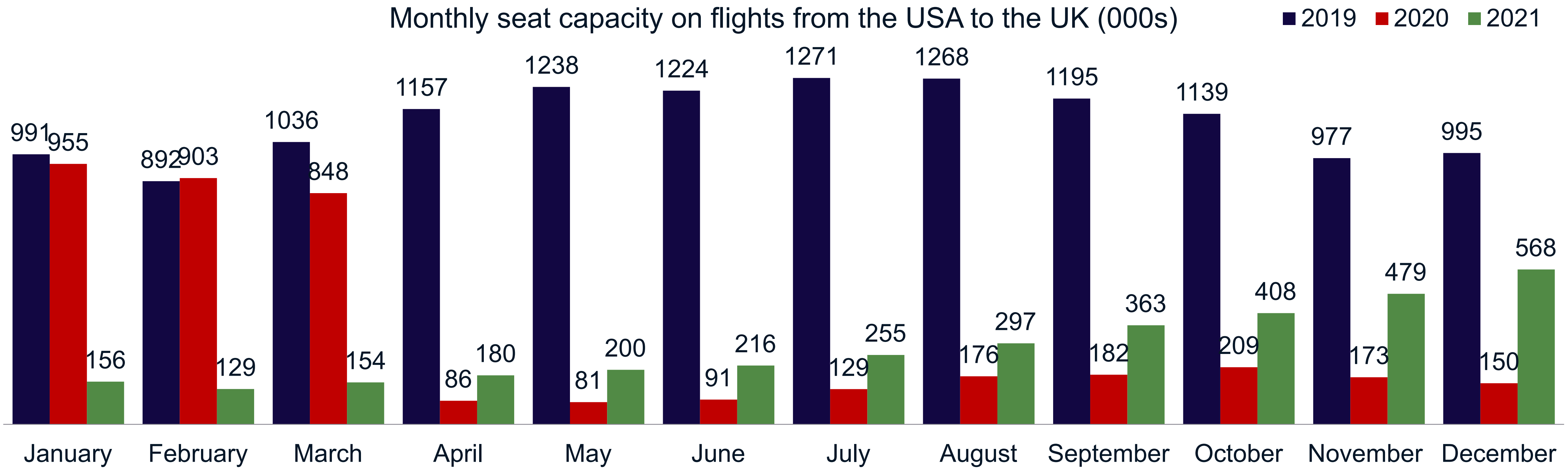
Note: please read the pie chart clockwise

Other origin airports: Philadelphia Int. Houston - George Bush Intercontinental Las Vegas - McCarran Int. Seattle/Tacoma Int. Denver Int. Charlotte - Douglas Phoenix - Sky Harbor Int. Detroit - Wayne County Austin-Bergstrom Int. Tampa Int. San Diego Int. Raleigh/Durham Orlando Sanford Intl Baltimore/Washington Int. Thurgood Marshall Minneapolis - St Paul Int. San Jose - Norman Y. Mineta Int. Nashville Int. Fort Lauderdale-Hollywood Int. New Orleans - Louis Armstrong Int. Salt Lake City Int. Portland Int. Pittsburgh Int. Metropolitan Oakland Int. Charleston Int. Newburgh - Stewart

Source: Apex 2019: non-stop flights only

4.1 Access: impact of the COVID-19 pandemic

Impact of the COVID-19 pandemic on connectivity



- Seat capacity on non-stop flights between the USA and the UK declined by -70% in 2020 overall compared to 2019 as a result of the COVID-19 pandemic. The impact was felt from March 2020 when the travel corridor between both countries closed and capacity across April to June 2020 dropped to average of -93% below the levels of 2019.
- As of November 2021 seat capacity was -51% down on 2019 levels, following a steady pace of recovery across 2021. Further improvements are expected in the coming months as UK border restriction were eased for fully vaccinated US residents from the beginning of August 2021.

Source: Apex, non-stop flights only.

4.2 Travel trade: general overview (1)

The travel trade structure in the US is made up of tour operators, online travel agents (OTAs) and front-line retail travel agents:

- **Tour operators:** are responsible for operating and providing trips through the contracting, booking and packaging together of various components of a tour such as hotel, transportation, meals, guides, optional tours and sometimes flights. This category covers escorted tours, FITs (free independent travellers) and 'Special Interest' (which can incorporate both niche interests, such as history, gardening tours through to University Alumni large escorted group tours).

- **Travel agents:** hold the role of selling and administering packages from various tour operators to their personal clients based on what they're looking for and what package suits each client best. While many tour operators focus on a select concentration of destinations most travel agents can specialise in a range of destinations and then they can narrow down a package for that specific destination or area of interest based on budget, preferred method of travel and interests.

- Retail Travel agents: this category covers independent and / or home based agents, consortia co-ops and franchise networks.
- Online travel agents (OTAs): this category is dominated by two of the largest global online travel agencies Expedia Group (Expedia, Hotels.com, Hotwire and trivago) and Booking Holdings (Booking.com, Kayak, Priceline, OpenTable, Agoda and Rental cars) who operate through a dynamic portfolio of brands across different regions. Other smaller more niche OTAs have more of an attractions/tours/experiences focus (e.g. Klook, GetyourGuide, Viator, Musement, TripAdvisor). Traditional OTA's such as such as Airbnb, Booking.com and Expedia also offer bookable in-destination experiences.

- **Ground Operators/ Destination Management Companies (DMCs):** their main function is to organise tour arrangements for incoming tourists on the behalf of overseas operators.

- It is a relatively complex mix as operators can sell consumer-direct or via travel agents; whilst travel agents compete head to head with OTAs mainly on air and accommodation and yet offer a more detailed and tailored service for those consumers wishing to book a more complex trip.

Source: VisitBritain

VisitBritain VisitEngland

4.2 Travel trade: general overview (2)

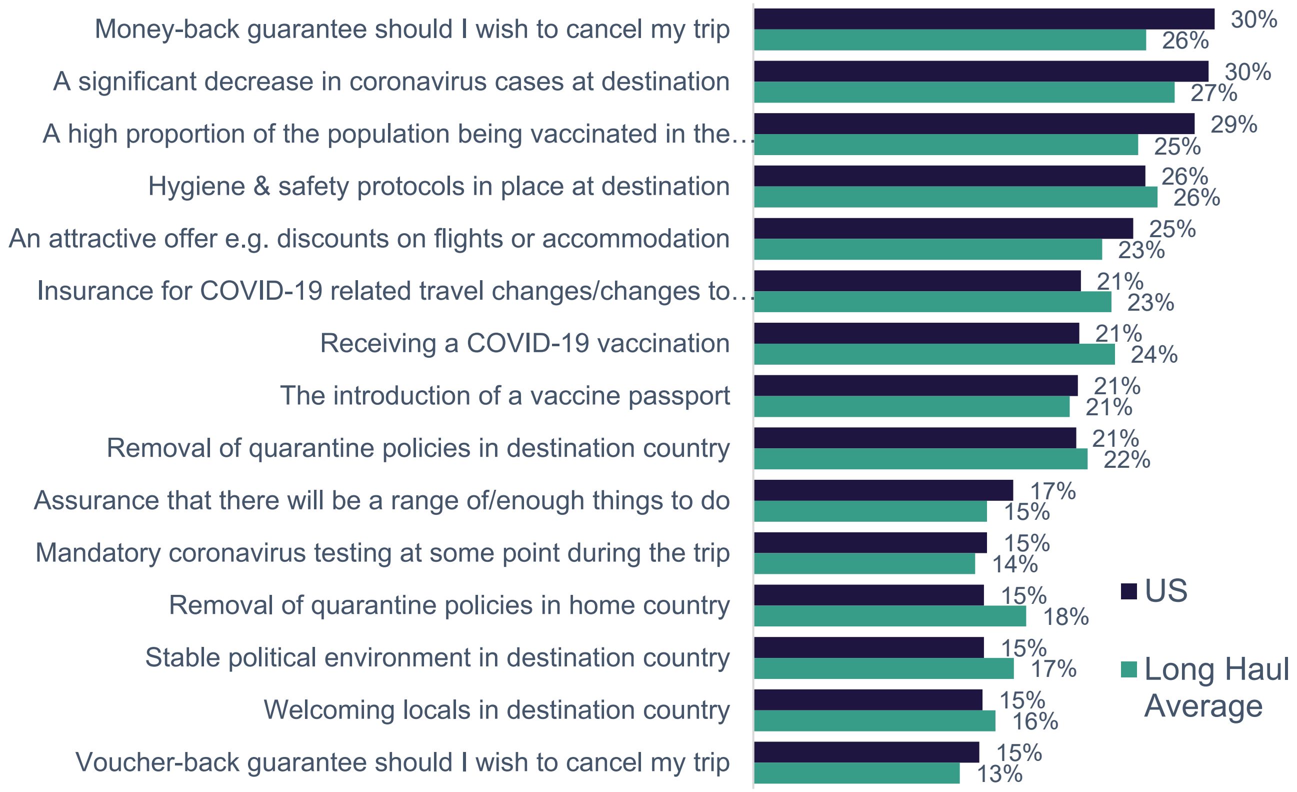
- The third wave of VisitBritain's international recovery sentiment tracking research reveals the pent up demand for international travel since the onset of the pandemic. 80% of Americans considered taking an international leisure trip in the next 12 months, demonstrating the strongest desire to travel since the start of the tracker. Visiting friends and relatives is a key reason to travel internationally with a third hoping to travel for this primary purpose.
- More than half of Americans state that they will think more about sustainability and the environmental impact when planning a future holiday. The youngest age groups show the strongest intention to change their behaviour, especially those under 45 years.
- Driven by the pandemic, American travellers have a higher expectation for flexible booking than ever before. Securing money-back guarantee on bookings ranked as a number one motivator to booking their next international leisure trip on par with the significant decrease of COVID-19 cases in-destination.
- Booking direct with travel or accommodation provider remains the most considered booking method for the next international trips; however, 2 in 3 also agree that 'booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning' highlighting the need for strong confidence when booking trips.
- American travellers seek new, immersive and authentic experiences that encompass both iconic and traditional attractions as well as those experiences that offer a window into the culture and local aspects of British life. Even in more standard packages, consumers are looking for experiential moments that go beyond the ordinary tourist experience and create a sense of place. VB research identified that a key concern for Americans currently is the impact of COVID on limiting or restricting in-destination experiences.
- Relaxation, scenic beauty and new experiences are what Americans most want to get out of their travels in the next 12 months. Americans will also seek out escapism, food experiences and adventure. Affordability will also be of high importance. It was among the top three destination attributes they consider very important or essential in regard to the destinations they plan to visit in the next year - after fun and relaxing[2].
- There is a recognition among the US trade for the need to diversify with new experiences and destinations. However, the trade are consumer-data driven and unlikely to develop new product or packages unless there is proven consumer demand. There also needs to have the supply of products that are bookable for the trade, variety & amount significantly decreases outside of major cities.

Source: VisitBritain, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021, (2) Destination Analysts

4.2 Travel trade: current context

- Due to the COVID-19 outbreak, travel and capacity patterns have been altered since March 2020.
- As of August 2021 American residents can visit Britain with no restrictions on entry and no need for quarantine on arrival providing travellers are 100% vaccinated with UK government approved vaccines.
- In September 2021, 80% of American travellers intend to take an international leisure trip in the next 12 months, up +6pts from April this year. More significantly, 58% say they will definitely do so, up from 50% in wave 2 and 46% in wave 1.
- While a reduction in case numbers, vaccinations and other health and hygiene factors still act as key activators for planning a trip to Britain, the attitudinal shift from health-centric to money-centric is tangible. In the US, a money-back guarantee is now mentioned as a #1 activator, on par with the significant decrease of cases in-destination.

What would make you more likely to travel to Britain (England, Scotland, Wales) for leisure in the next 12 months?



Source: TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021

4.2 Travel trade: American holidays

National public holidays:

2022	2023	National public holidays
1 January	1 January	New Year's Day
17 January	16 January	Martin Luther King Jr. Day
21 February	20 February	Presidents' Day
30 May	29 May	Memorial Day
4 July	4 July	Independence Day
5 September	4 September	Labor Day
10 October	9 October	Columbus Day (most regions)
11 November	11 November	Veterans Day
24 November	23 November	Thanksgiving Day
25 December	25 December	Christmas Day

Major Jewish Holidays:

2022	2023	National public holidays
25 September	15 September	Rosh Hashana
4 October	24 September	Yom Kippur
18 December	7 December	Chanukah/Hanukkah

Source: www.timeanddate.com/holidays/us/

4.2 Travel trade: practical information

General practical information:

- Standard business hours are Monday to Friday, 9am-5pm local time. Note that many businesses will close early on the day prior to a major public holiday.
- The US operates on 4 time zones; Eastern Standard Time (EST), Central Standard Time (CST), Mountain Standard Time (MST) and Pacific Standard Time (PST). They are respectively 5, 6, 7 and 8 hours behind GMT.
- When making appointments it is best to avoid Monday mornings and Friday afternoons. It is also recommended to check dates for major Christian & Jewish Holidays as this can affect attendance at events and/or meetings.
- Direct eye contact is important and in most situations you can call people by their first names. However, in formal circumstances, you may want to use titles and surnames as a courtesy until you are invited to move to a first name basis, which will happen quickly. Business cards are exchanged without formal ritual.
- Americans tend to speak clearly and in a straightforward manner. Your own business delivery should be polite and yet mirror the US expectations displayed during the meeting. Do research on the company and be knowledgeable of what travel agency consortia they may prefer. Identify the opportunity for business and discuss the point in hand and if follow-up is required this should be done in a timely fashion and within a 24-hour turnaround period.
- When calling on wholesalers, quote net prices, sufficient to allow them a 20%-25% mark-up, as they will have to relinquish at least 10% to a travel agent.
- The best times of the year to call are between January and April for travel agents and between April and June for wholesalers. While the first half of a year remains high for contracting, changes to products has driven contracting times to be spread more evenly across the year. Lead time with tour operators varies from 6 months to 2 years to see a new product become available for purchase.
- UK suppliers can also sell through a representative in the US. This is an effective method and normally the most costly means of selling your product overseas.

4.2 Travel trade: planning cycles

Planning cycle:

- The planning cycle for operators depends on the size of the company and business focus. Many do have main season and off-season product, so will engage in the buying process with suppliers in spring for the following year.
- In general, we suggest a minimum of 2 years lead time for an escorted operator to get new product 'on the shelf' and out to the consumer or travel agent.
- Alternatively, FIT/independent travel product can be more flexible and allow for shorter lead time (6 months to 1 year) for integration into their existing business model. Operators will need time for planning, sourcing product, costing and pricing. Be prepared to consider offering co-operative marketing dollars to support the marketing necessary to promote this new product.
- For the most part, contracting for the following year can start any time from the fall (World Travel Market) through until June.
- Brochure production and distribution time is mainly September in order to release "Early Bird" special offers, in the fall, for promotion for the following season. However, some operators bring this forward depending on the economic climate to stimulate demand and win business over competitors.
- Although the planning cycle is shared here, some independent operators will develop product at various times throughout the year as many no longer publish printed brochures. This allows more flexibility with developing and promoting new offers online. In recent years there has been an increased shift to online promotions to support off-season product so the opportunity for shorter lead times also exists.

4.2 Travel trade: hospitality etiquette

Meeting etiquette

- Plan your travel schedule in advance. In major US cities where traffic is heavy, it is recommended to double the estimated travel time just to be safe.
- Arrive on time, call ahead if running late.
- Be prepared with your objectives you wish to accomplish from a face to face meeting.
- If you arrive unprepared, remember there is probably another product supplier hot on your heels and next in line. At certain key contracting times, it is not uncommon for VisitBritain to know of 3+ British suppliers to be in a city at any one time, all undertaking independent sales calls to the same tour operators/travel agents.
- If using a taxi service to move between meetings, note that Taxi drivers should get tipped 10% of the fare, but a minimum tip is US $2. Lyft, a ridesharing operator, offers an in-app method for tipping. Uber also introduced tipping functionality in 2017, and it's recommended to tip 15–20% for a great service, 10–15% for good service, and 10% for mediocre service. Don't forget, your Uber driver will rate you, too.

Hospitality etiquette

- When hosting a US client for dinner or drinks you should be prepared for the check (bill) to arrive either inclusive-of or subject-to a gratuity. This can vary from 20 to 25% dependent on the service. Its worth noting that in some states and establishments a COVID-19 recovery charge of 5% is also added to the bill in addition to gratuity.
- Many establishments will be recommending how much to tip at the bottom of your receipt, with many including a gratuity charge for groups of 8 or more; look over your check before paying to avoid leaving two tips. It is not advisable to dismiss the addition of a gratuity as it is common practice, and an expectation in the US service industry, and you would embarrass a US client if you did not make the gratuity addition.
- A hosted client may stay for the minimum time it takes to dine and conduct a business discussion but do not be surprised if they make their excuses to leave after that point. Unlike many British people whom may extend the evening to get better acquainted and have access to good public transport in all cities, Americans may have to drive home or travel long distances and so time can be precious.

4.3 Caring for the consumer (1)

Accomodation

- As many will arrive in Britain on overnight flights from the US consideration for early check-in at hotels/accommodation is always appreciated. If you are their first port of call from the airport, try and arrange for some form of hospitality and services when they arrive, especially if their accommodation is not ready. This mainly applies to business visitors and those on upscale FIT trips.
- Americans are used to sleeping in larger beds and larger rooms than are generally found in Britain and, without exception, to having private bathroom facilities. Americans view accommodation as an important part of the travel experience. They will put a premium on staying at a historic/grand property or a hotel that reflects the local culture.
- The majority of Americans will want to stay in a 4-star plus property in a good/central location. They can often be drawn into brand loyalty with rewards/point schemes and have strong preconceptions to certain global brands.
- Health and wellness is trending in the USA. More Americans are looking for destinations that cater to that interest (e.g. yoga, meditation, spa, staying active).

Language

- The US has no official national language, but English has acquired official status in 32 of the 50 states; Hawaiian is an official language in the state of Hawaii, and 20 indigenous languages are official in Alaska.
- 78% of American's first language is English. Spanish is spoken in 13% of households in the US and 1.1% speak Chinese (1).
- The old adage "Two nations separated by one common language" holds true to a certain extent. American English does differ in many common words, and Americans find the British accent very interesting. This may cause confusion and yet at the same time serve as an ice-breaker for visitors and locals alike! It forms part of the charm and intrigue that Americans appreciate about Britain and adds to the authenticity of the travel experience.

Source: (1) CIA World Factbook, 2021

4.3 Caring for the consumer (2)

Food and drink

- Americans have a strong interest in culinary experiences when on vacation. Dining in restaurants, bars, cafes or pubs during an international leisure trip was ranked in the top 3 most interested activities along side exploring history and heritage and visiting famous and iconic tourist attractions(1).
- Almost 1 in 3 Americans would go back to an overseas destination on holiday for its local food and drink offering, and this was ranked the number one driving factor for returning to a destination on vacation(2).
- While existing stereotypes mean there is a lack of excitement about British cuisine pre-visit, perceptions improve after having visited due to the culturally diverse range of foods available and the modern food scene.
- 89% of American visitors to the UK were satisfied with their food and drink and 53% were very satisfied; both scores are above average for all visitors to the UK (3).
- 71% of American international travellers think that British food products are good quality(3).
- American travellers want food experiences that are off the beaten path; they seek authentic and unique experiences. Recommendations by locals are highly valued.
- There is a particular interest in locally sourced and organic produce and vegan and gluten free food is becoming more and more popular as a dietary choice.
- Americans will tend to eat an evening meal fairly early, especially those with families. Visitors from metropolitan cities may have more flexible eating habits as restaurants tend to open late.
- Americans are very comfortable paying for goods and services with a credit card.
- America has a tipping culture when it comes to service, and tipping between 20-25% of the total food bill is standard. In some states and establishments a COVID-19 recovery charge of 5% is also being added to the bill in addition to gratuity. As a result of this they will expect good service from restaurants, even on the budget side, with iced tap water and provided and refilled as happens routinely in most US restaurants.

Source: (1) TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021 (2) Anholt Nation Brands Index, powered by Ipsos 2019, (3) IPS 2015

VisitBritain VisitEngland

Useful links and further information

Appendix

Appendix 1: Working with VisitBritain (1)

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or partnering to host journalists, influencers, and broadcast shoots
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Retailing your product through the VisitBritain shop
- Joining the Tourism Exchange GB platform – giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.
- Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our:

Opportunity search or trade website

or contact the B2B events team
(Email: events@visitbritain.org)

or campaign partnerships team
(Email: partnerships@visitbritain.org)

or trade support team
(Email: tradesupport@visitbritain.org)

or VisitBritain shop team
(Email: product@visitbritain.org)

Appendix 1: Working with VisitBritain (2)

VisitBritain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since April 2016
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our **'I Travel For…'** marketing campaign.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund. Find out more at our Discover England Fund page.

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

Business Recovery Webinars

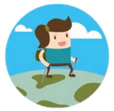
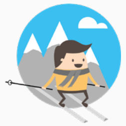
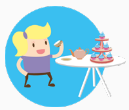
DCMS's Tourism Recovery Plan

Appendix 1: Working with VisitBritain (3)

VisitBritain’s global audience segments

- From 2017, VisitBritain has carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers’ market. On the right is a summary of VisitBritain’s 5 global audience segments. To learn more visit our page on understanding our customers.

- In USA, VisitBritain focuses on three audience segments among the international travellers:
  - **Buzzseekers in USA:** Trendsetters seeking out new experiences and always looking for action and excitement
  - **Explorers in USA:** Like to go to places that are off the beaten track as well as visit top attractions at a relaxed pace
  - **Sightseers in USA**: Sensible city travellers who like to visit places that are safe and well known

Segments (& global attributes)	Global market share	Market share in USA
 **Buzzseekers** (free spirited and spontaneous, they like holidays full of action and excitement)	38%	36%
 **Explorers** (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)	23%	20%
 **Adventurers** (they live to go off the beaten track, spending time outdoors and trying out new experiences)	16%	21%
 **Sightseers** (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)	12%	15%
 **Culture Buffs** (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)	12%	7%

Source: VisitBritain/Kubi Kalloo, 2017

Appendix 2: Useful research resources (1)

We have dedicated research and insights available which include:

- Latest monthly, quarterly, overall and quarterly by area data from the International Passenger Survey by ONS.
- Inbound Tourism Trends by Market
- Inbound activity data
- Inbound nation, region and country data
- Inbound town data
- Sector-specific research which includes topics such as accomodation, countryside and coast, culture heritage and attractions, food and drink, football tourism, shopping, transport and visits with a health condition or impairment.
- 2022 Inbound Tourism Forecast
- Britain's competitiveness

We are here to support you and look forward to working with you.

To find out more about USA or other inbound markets browse our:

Markets & segments

Inbound research & insights

Or contact us directly
(Email: research@visitbritain.org)

VisitBritain VisitEngland

Appendix 2: Useful research resources (2)

We have dedicated research and insights available which include:

- COVID-19 consumer sentiment tracker
- Perceptions of Britain overseas
- Planning, decision-making and booking cycle of international leisure visitors to Britain
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
- Food & drink research

We are here to support you and look forward to working with you.

To find out more about USA or other inbound markets browse our:

Markets & segments

Inbound research & insights

Or contact us directly
(Email: research@visitbritain.org)

Appendix 3: Definitions, sources and information on this report (1)

Details on main sources:

- The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse our IPS page.
- **Oxford Economics** tourism forecasts are from the October 2021 update of the 'Global Travel Service' databank. Other information on America were updated 6th November 2021.
- **Apex** data was last updated with December 2021 data.
- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, August/September 2021.
- **VisitBritain/IPSOS 2016** refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.
- The **Anholt Nation Brands Index** (NBI), now powered by Ipsos, was carried out online in July 2021 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Saudi Arabia, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples. More detail in our 'How the world views the UK' foresight.

Appendix 3: Definitions, sources and information on this report (2)

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** journey purpose means Miscellaneous – other journey purposes.
- In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2019. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.
- **Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.

Market and Trade Profile: USA

February 2022