Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Chinese travellers and who they are. It takes a look at Britain and its competitive set as well as activities of visitors from China in the UK.

- **Chapter 2: Experiences and perceptions** features details about what visitors from China 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 the Chinese in general are also highlighted.

- **Chapter 3: Understanding the market** takes a close look at consumer trends in China, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach consumers in China are indicated too.

- **Chapter 4: Access and travel trade** shows how people from China travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the Chinese travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.
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Executive summary
1: Inbound market statistics

Chapter summary

China is the most valuable market for international tourism expenditure, spending over US$277bn abroad in 2018.

The Chinese outbound market is booming. Visits abroad have more than tripled in 10 years; from almost 27m overnight stays in 2008, to 100m in 2018. The growth rate of outbound visits has slowed in recent years, but they are still forecast to exceed 160m trips overseas by 2028.

Hong Kong and Macao are usually the most visited destinations by Chinese travellers. However, with more now venturing further away, the USA, France, Germany, Australia and the UAE remain the most popular destinations outside of Asia and neighbouring Russia for Chinese visitors in 2018.

China was the 22nd largest inbound source market for the UK in 2018, and the 10th for spend, with new records set for both visits and nights spent in the UK.

NB there is evidence that the International Passenger Survey has underestimated the numbers of Chinese visitors to the UK in recent years, based on comparisons with other data sources. Estimates of visitors from China may be subject to change.*

*Note: Official IPS visit figures are issued by the Office for National Statistics.

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO
2: Experiences and perceptions

Chapter summary
Chinese people usually have a good opinion of Britain. In 2018 they ranked Britain 2\textsuperscript{nd} among 50 nations overall, and also for tourism, culture and people. Comparatively, Britain’s natural beauty ranked lower (15\textsuperscript{th}).

France (strongest on historic sites) and Australia (strongest on sun) are usually perceived by the Chinese as places that would better suit their holiday needs than the UK before travelling. However, the French tourism sector has warned of negative impacts resulting from Yellow Vest protests – so perceptions of safety may be affected among Chinese travellers.

In contrast, once they visit Britain, almost 3-in-4 holidaymakers would be ‘extremely likely’ to recommend a holiday to Britain.

Both cultural attractions and natural beauty feature in the most common reasons why Chinese leisure travellers visit Britain. When on holiday in Britain, they are also more likely to partake in cultural and nature-related activities than the all-market average.

Main reasons why Chinese people visited Britain:
- Cultural attractions
- Local food/dinks
- Natural beauty

Source: Anholt Nation Brands Index 2018 (powered by Ipsos), Arkenford 2013, International Passenger Survey by ONS, VisitBritain/IPSOS 2016, France24
3: Understanding the market

Chapter summary
China has a population of 1.4 billion; the largest in the world, with growing young middle and affluent classes. However, the population has started to age.

Most Chinese visitors live in large urban areas (30% from Beijing and 18% from Shanghai), despite a low urbanisation rate in the country overall when compared to neighbouring countries.

There are 10 Chinese public holidays per year, and going away is a strong aspiration: it is an opportunity to display your social status and learn more about the world.

Chinese visitors have a very short lead-in time: 75% of visitors to Britain booked their trip within 2 months of their departure.

Word-of-mouth is the most important influence on destination choice.

Chinese middle and upper classes now explore destinations further away than ever before, and this trend is set to grow. Mobile travel apps and platforms allow them to be more independent in planning their travels. Culture is still an important draw to travel for most, but interests in niche destinations and unique experiences is growing too.

4: Access and travel trade

Most Chinese visitors will reach Britain by air. Only 5% of visits from China to the UK in 2018 were made through the tunnel or by sea in total. Looking at Chinese holiday visitors in 2016, 24% paired a visit to the UK and to another country as part of the same trip.

Airline seat capacity from China to Britain has grown significantly in the past ten years. Chinese carriers have increased their capacity to the UK, creating new routes or converting seasonal routes into year-round services.

The Chinese travel market is still very much dominated by offline bookings, especially for long haul trips. However, online travel agents (OTAs) are making progress year on year: almost 1-in-2 netizens made a travel booking online in China by the end of 2017, and millennials are more likely to use OTAs than those aged 37 plus.

The online travel agent (OTA) market also tends to be less fragmented than the traditional travel trade. Ctrip dominates this online travel market, but the “BATs” (Baidu, Alibaba, Tencent) are major players too. Five OTAs command 80% market share.

Growth in seat capacity on direct, non stopping flights from China to Britain from 2008 to 2018

Source: International Passenger Survey by ONS, Apex RdC, CNNIC’s 41st report (January 2018), Analysys.cn, Resonance Consultancy/ China Luxury Advisors 2018, ChinaDaily.com
Chapter 1: Inbound Market Statistics
Chapter 1.1: Key statistics

Key insights

China was the 22nd largest inbound source market for the UK in 2018, and the 10th for spend.

2018 was a record year for the Chinese inbound market to the UK, with new records set for visits and nights. And this is no surprise: the Chinese outbound market is booming, and with only 30% of Chinese holiday visitors to the UK having been before (vs. 63% across markets), this should only grow further.

In 2018, 57% of Chinese visits to the UK were made by holidaymakers. 9% of visits are made by students*, which is considerably higher than the all market average of 1%, and due to longer stays, students make up 41% of the nights spent by Chinese visitors in the UK. This demonstrates that China is a key market for study tourism.

In 2018, visits from China were still very seasonal with 41% taking place between July and September. Regional spread is more pronounced: Chinese visitors spent 58% of their nights in the UK outside of London.

£657m
spent in the UK in 2018


*To be included in IPS figures as an overseas study visitor, students must be staying in the UK for less than one year.
1.1 Key statistics

Global context

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>International tourism expenditure (US$bn)</td>
<td>277.3</td>
</tr>
<tr>
<td>Global rank for international tourism expenditure</td>
<td>1</td>
</tr>
<tr>
<td>Number of outbound visits (m)</td>
<td>97.7</td>
</tr>
<tr>
<td>Number of outbound visits, excl. Hong Kong and Macao (m)</td>
<td>65.8</td>
</tr>
<tr>
<td>Most visited destination overall</td>
<td>Hong Kong</td>
</tr>
<tr>
<td>Most visited destination overall (excl. Hong Kong and Macao)</td>
<td>Thailand</td>
</tr>
<tr>
<td>Most visited destination in Western Europe</td>
<td>France</td>
</tr>
<tr>
<td>UK’s ranking by number of outbound visits from China</td>
<td>9th in Europe</td>
</tr>
</tbody>
</table>

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

Inbound to UK overview

<table>
<thead>
<tr>
<th>Measure</th>
<th>Visits (000s)</th>
<th>Nights (000s)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 year trend (08-18)</td>
<td>+262%</td>
<td>+165%</td>
<td>+380%</td>
</tr>
<tr>
<td>2008</td>
<td>108</td>
<td>2,312</td>
<td>137</td>
</tr>
<tr>
<td>2009</td>
<td>89</td>
<td>1,166</td>
<td>117</td>
</tr>
<tr>
<td>2010</td>
<td>109</td>
<td>2,303</td>
<td>184</td>
</tr>
<tr>
<td>2011</td>
<td>149</td>
<td>2,906</td>
<td>240</td>
</tr>
<tr>
<td>2012</td>
<td>179</td>
<td>4,000</td>
<td>300</td>
</tr>
<tr>
<td>2013</td>
<td>200</td>
<td>4,918</td>
<td>503</td>
</tr>
<tr>
<td>2014</td>
<td>185</td>
<td>4,486</td>
<td>497</td>
</tr>
<tr>
<td>2015</td>
<td>270</td>
<td>3,929</td>
<td>586</td>
</tr>
<tr>
<td>2016</td>
<td>260</td>
<td>5,166</td>
<td>513</td>
</tr>
<tr>
<td>2017</td>
<td>337</td>
<td>5,988</td>
<td>694</td>
</tr>
<tr>
<td>2018</td>
<td>391</td>
<td>6,124</td>
<td>657</td>
</tr>
</tbody>
</table>

Share of UK total in 2018

<table>
<thead>
<tr>
<th>Measure</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (000s)</td>
<td>1%</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>2.3%</td>
</tr>
<tr>
<td>Spend (£m)</td>
<td>2.9%</td>
</tr>
</tbody>
</table>
### 1.1 Key statistics – volume and value

#### Inbound volume and value

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018</th>
<th>Change vs. 2017</th>
<th>Rank out of UK top markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (000s)</td>
<td>391</td>
<td>+16%</td>
<td>22</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>6124</td>
<td>+2%</td>
<td>13</td>
</tr>
<tr>
<td>Spend (£m)</td>
<td>657</td>
<td>-5%</td>
<td>10</td>
</tr>
</tbody>
</table>

#### Nights per visit, spend

<table>
<thead>
<tr>
<th>Averages by journey purpose in 2016-2018</th>
<th>Nights per visit</th>
<th>Spend per night</th>
<th>Spend per visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>10</td>
<td>£152</td>
<td>£1,488</td>
</tr>
<tr>
<td>Business</td>
<td>9</td>
<td>£205</td>
<td>£1,930</td>
</tr>
<tr>
<td>Visiting Friends/Relatives</td>
<td>18</td>
<td>£66</td>
<td>£1,189</td>
</tr>
<tr>
<td>Study*</td>
<td>88</td>
<td>£71</td>
<td>£6,228</td>
</tr>
<tr>
<td>All visits</td>
<td>17</td>
<td>£108</td>
<td>£1,884</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS

*Sample size below 100 respondents. Student travellers include all types of formal and informal study who stay less than one year.
1.1 Key statistics: journey purpose

57% of all visits to the UK from China were made for holiday purposes. This is above the all-market average, 40%.

It also means that there were more Chinese holiday visits than all other purposes added together.

The second most popular reason why people visited the UK from China in 2018 was to visit friends and relatives (VFR). This is a change since 2017, which was the only year since 2014 that there were more visits from China to the UK for business than visiting friends or relatives.

Holiday visits have led the volume growth in the Chinese market since 2012, with a dip in 2016 followed by strong growth in 2017 and 2018.

The relative importance of business visits has dropped in the last 10 years due to the rise of holiday travellers, but the number of business visits has remained relatively stable.

There was also a new record for study visits set in 2018. Visitors from China are much more likely to be visiting the UK for study than the all-market average. In 2018, 41% of Chinese nights in the UK were spent on a study trip.

Source: International Passenger Survey by ONS, sample size for individual year and journey purpose may be below 100 respondents
1.1 Key statistics: seasonality

Visits from China are very seasonal: in 2018 41% of all visits from China were made in July-September. Visits during the summer started driving the growth in 2012, around the same time as holiday visits started growing more than other journey purposes. Seasonal direct flights between China and the UK also support this trend. Chinese visitors are less likely to visit in Q2 (April-June) than the all-market average (18% vs 27% in 2018 respectively). The Chinese New Year Golden Week and National Day Golden Week happen in the first and last quarter of the year, and might be driving some more visits in those months.

Seasonality 2018

Seasonality trend (visits 000s)

Source: International Passenger Survey by ONS
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in (average nights in 2018, % share)

- Hotel/guest house: 34%
- Hostel/university/school: 25%
- Free guest with relatives or friends: 22%
- Rented house/flat: 13%
- Bed & Breakfast: 4%
- Paying guest family or friends house: 2%
- Other: 0.9%
- Own home: 0.3%

Duration of stay trend (average annual visits in 000s, rolling 3 years ending in year shown)

As a long haul destination, Chinese travellers tend to stay for a medium or long trip, and are less likely to stay 1-3 nights. Trips of 15+ nights are also quite popular, especially for VFR and study visits but also 14% of holiday trips.

In 2018, the most popular accommodation type among the Chinese visitors was hotels and guest houses, with 34% of all nights spent in the UK spent there. Hostel/university/school or a rented house/flat (25% and 13% of all nights respectively) may be boosted by the number of nights spent by study visitors from China in Britain overall.

Source: International Passenger Survey by ONS
1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK that have visited the UK before*

<table>
<thead>
<tr>
<th>Country</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hong Kong</td>
<td>52%</td>
</tr>
<tr>
<td>Japan</td>
<td>49%</td>
</tr>
<tr>
<td>South Korea</td>
<td>21%</td>
</tr>
<tr>
<td>China</td>
<td>30%</td>
</tr>
<tr>
<td>All markets</td>
<td>63%</td>
</tr>
</tbody>
</table>

Proportion of visits that are bought as part of a package or all-inclusive tour** (2016-2018 average)

<table>
<thead>
<tr>
<th>Category</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Holiday</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>VFR</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Study</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Misc.</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>All journey</td>
<td>9%</td>
<td>7%</td>
</tr>
</tbody>
</table>

China is still a growing market: in 2015, only 30% of holiday visits from Chinese residents (excluding British expats) to the UK were made by repeat visitors, compared to 63% across all markets. On average a Chinese holidaymaker came 1.6 times to the UK in the past 10 years.

Holiday visits are most likely to be bought as a package tour, similar to the pattern we see globally.

Source: International Passenger Survey by ONS. *2015, excluding British nationals; * 2015 data
**See definition of a package holiday in appendix
### 1.2 Getting around Britain: regional spread

**Annual visits to the UK (2016-2018 average)**

<table>
<thead>
<tr>
<th>Region</th>
<th>Nights stayed (000)</th>
<th>Visits (000)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>5,760</td>
<td>330</td>
<td>621</td>
</tr>
<tr>
<td>Scotland (SC)</td>
<td>400</td>
<td>53</td>
<td>43</td>
</tr>
<tr>
<td>Wales (WA)</td>
<td>67</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>Northern Ireland (NI)</td>
<td>13</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>London (LDN)</td>
<td>2,206</td>
<td>221</td>
<td>310</td>
</tr>
<tr>
<td>North East (NE)</td>
<td>239</td>
<td>7</td>
<td>23</td>
</tr>
<tr>
<td>North West (NW)</td>
<td>1010</td>
<td>56</td>
<td>90</td>
</tr>
<tr>
<td>Yorkshire (YO)</td>
<td>298</td>
<td>26</td>
<td>32</td>
</tr>
<tr>
<td>West Midlands (WM)</td>
<td>345</td>
<td>24</td>
<td>25</td>
</tr>
<tr>
<td>East Midlands (EM)</td>
<td>108</td>
<td>13</td>
<td>10</td>
</tr>
<tr>
<td>East of England (EoE)</td>
<td>204</td>
<td>20</td>
<td>17</td>
</tr>
<tr>
<td>South West (SW)</td>
<td>286</td>
<td>24</td>
<td>20</td>
</tr>
<tr>
<td>South East (SE)</td>
<td>583</td>
<td>45</td>
<td>40</td>
</tr>
<tr>
<td>Nil nights (Nil)</td>
<td>N/A</td>
<td>1</td>
<td>&lt;1</td>
</tr>
</tbody>
</table>

**Nights (% share, 2016-2018)**

Source: International Passenger Survey by ONS
1.2 Getting around Britain: regional spread and top towns and cities

**Top towns and cities visited (2016-2018 average)**

<table>
<thead>
<tr>
<th>Town</th>
<th>Overnight visits (000s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>221</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>45</td>
</tr>
<tr>
<td>Manchester</td>
<td>41</td>
</tr>
<tr>
<td>Cambridge</td>
<td>15</td>
</tr>
<tr>
<td>Oxford</td>
<td>15</td>
</tr>
</tbody>
</table>

Chinese visitors show an above-average spread across the UK’s nations and regions. London is the leading overnight destination whilst in Britain, but Scotland, the North West and South East of England are also popular.

Indeed, 61% of all nights spent by Chinese visitors in the UK in 2016-2018 were spent outside of London, compared to 58% for the all-inbound all market average.

Although, if we consider the regional spread by purpose of visit, 61% of nights spent in the UK by Chinese holidaymakers were spent in London in 2016-2018. However, close to or over 6-in-10 nights for each of the other visit purposes were spent in the rest of England.

On average in 2016-2018, the proportion of nights spent overall in Scotland by Chinese visitors was on par with the all-market average. That is also true when looking at holiday visits only, with 12% of nights spent in Scotland for both in 2016-2018.

Visits from China have an above average propensity to feature rural and coastal areas of Britain.

**Regional spread (2016-2018)**

- Scotland: 7% (China), 8% (All markets)
- Wales: 1% (China), 2% (All markets)
- London: 38% (China), 41% (All markets)
- Rest Of England: 53% (China), 47% (All markets)
- Northern Ireland: 0.2% (China), 0.9% (All markets)

*Source: International Passenger Survey by ONS*
1.2 Getting around Britain: visits to coast, countryside and villages

<table>
<thead>
<tr>
<th>Purpose</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFR: Went to the coast or beaches</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>VFR: Went to countryside or villages</td>
<td>23%</td>
<td>17%</td>
</tr>
<tr>
<td>Business: Went to the coast or beaches</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Business: Went to countryside or villages</td>
<td>13%</td>
<td>2%</td>
</tr>
<tr>
<td>Holiday: Went to the coast or beaches</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Holiday: Went to countryside or villages</td>
<td>26%</td>
<td>18%</td>
</tr>
<tr>
<td>All journey purposes: Went to the coast or beaches</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>All journey purposes: Went to countryside or villages</td>
<td>22%</td>
<td>13%</td>
</tr>
</tbody>
</table>

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

- Car/vehicle you/group brought to the UK: 0% in China, 1% in All markets
- Hired self-drive car/vehicle: 3% in China, 5% in All markets
- Private coach/minibus (for group only): 2% in China, 6% in All markets
- Public bus/coach (outside town/city): 15% in All markets, 8% in China
- Uber: 9% in China, 15% in All markets
- Taxi: 27% in China, 31% in All markets
- Train (outside town/city): 31% in China, 23% in All markets
- Bus, Tube, Tram or Metro Train (within town/city): 48% in All markets
- Domestic flight: 3% in China, 1% in All markets

Source: International Passenger Survey by ONS, 2018
1.2 Getting around Britain: purchase of transport within Britain

Chinese visitors are more likely than the average to take taxis or to take public transport when staying in a town or a city, with 31% and 66% respectively doing so, compared to 27% and 48% respectively for the all-market average.

When getting out of a town or city, they are also more likely to get on a train (31%), but also to take a public bus or coach (8%), or even a private bus or coach for a group (6%). However, they are less likely to drive a car within the UK, compared to other markets.

Usually they also tend to prefer booking those transport elements before they travel, with more Chinese holiday visitors booking their airport transfer, train or coach travel, and rental cars before the trip than during.

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

Visitor characteristics

Chinese visitors tend to be younger compared to other inbound markets. Only 9% of Chinese visitors are aged 55+, compared to the all-market average of 20%.

In the last three years, though, about 1-in-2 visits from China to the UK were made by people aged 25-44.

The overall gender ratio of visitors is relatively evenly balanced. However, when looking at trips by journey purpose, there are more women than men coming to visit friends and relatives, to study or take a holiday.

Most inbound visits to the UK from Chinese residents were made by Chinese nationals (87% of all 2018 visits), but 31% of VFR visits were made by British nationals in 2018.

Source: International Passenger Survey by ONS
1.3 Visitor demographics: gender and age groups

Gender ratio of visits (2016-2018)

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>51%</td>
<td>49%</td>
</tr>
<tr>
<td>All markets</td>
<td>56%</td>
<td>44%</td>
</tr>
</tbody>
</table>

Gender ratio of visits from China by journey purpose* (2016-2018)

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Misc.</td>
<td>47%</td>
<td>53%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Study</td>
<td>51%</td>
<td>49%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VFR</td>
<td>54%</td>
<td>46%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>53%</td>
<td>47%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td>30%</td>
<td>70%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Age group trend (average visits in 000s for rolling 3 years ending in each year shown)

Source: International Passenger Survey by ONS

* Low sample size for Misc. visits (sample =82), and for Study visits (sample = 18), please consider this data with caution
1.3 Visitor demographics: origin

Visits to the UK (in 000) 2017

- Around half of Chinese visitors live in the two major metropolitan areas: Beijing and Shanghai (30% and 18% respectively of visits to the UK made in 2017, amongst Chinese visitors who stated where they live).
- Other main cities are also represented, some in growing proportions: 11% of 2017 visitors to the UK from China lived in Guangzhou-Shenzhen-Dongguan, while only 8% of the 2013 visits lived there, for example.
- Other cities and areas that have grown as a proportion of inbound Chinese visitors to the UK include South Central China (with the Guangzhou-Shenzhen-Dongguan agglomeration, but also with Wuhan (7% in 2017, but 1% only in 2013)) and East China outside of Shanghai, which used to represent only 4% of visits in 2013. Meanwhile, Beijing’s share of visits fell from 46% in 2013 to 30% in 2017.

Visits in 000s | % share of visits

- High
- Medium
- Low

Source: International Passenger Survey by ONS
1.4 Britain and competitors

Market size, share and growth potential

The UK was the 9th most visited country in Europe by Chinese residents in 2018 for overnight stays. Forecasts suggest that there is the potential for steady growth in the number of visits to the UK during the next decade.

Of those who came to the UK for a holiday, 44% considered France, 31% Germany, and 27% Italy as an alternative holiday destination.

France is the most visited destination by Chinese travellers in Europe, but the USA was the most visited destination outside of Asia in 2018. Visits to France from China have fallen slightly in the last few years, but are set to increase again from 2018.

Overall, Chinese travellers are venturing to a wider range of destinations than before. Within the UK’s competitor set, ‘traditional’ European destinations have lost market share compared to other European (Switzerland, The Netherlands) and American destinations (USA, Canada) in the last 10 years, while Australia and New Zealand have roughly maintained their shares.

Source: Oxford Economics, VisitBritain/IPSOS 2016
1.4 Britain and competitors

UK’s market share of Chinese visits among competitor set

- United States: 26% (2018), 17% (2008)
- France: 18% (2018), 14% (2008)
- Germany: 15% (2018), 13% (2008)
- Australia: 13% (2018), 12% (2008)
- Switzerland: 9% (2018), 5% (2008)
- Canada: 6% (2018), 6% (2008)
- Netherlands: 5% (2018), 5% (2008)
- New Zealand: 4% (2018), 4% (2008)
- United Kingdom: 4% (2018), 3% (2008)
- Italy: 6% (2018), 3% (2008)

Source: Oxford Economics

Historic and potential overnight visits to UK (000s)

- 1997: 0
- 1998: 0
- 1999: 0
- 2000: 0
- 2001: 0
- 2002: 0
- 2003: 0
- 2004: 0
- 2005: 0
- 2006: 0
- 2007: 0
- 2008: 0
- 2009: 0
- 2010: 0
- 2011: 0
- 2012: 0
- 2013: 0
- 2014: 0
- 2015: 0
- 2016: 0
- 2017: 0
- 2018: 0
- 2019: 0
- 2020: 0
- 2021: 0
- 2022: 0
- 2023: 0
- 2024: 0
- 2025: 0
- 2026: 0
- 2027: 0
- 2028: 714

Source: Oxford Economics
1.4 The UK and its competitors

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

% visits which included at least a night in another country...

![Bar chart showing percentage visits before, after, and both before and after visiting the UK for all markets and China.]

- **All markets**
  - Before visiting the UK only: 4%
  - After visiting the UK only: 4%
  - Before and after visiting the UK: 5%

- **China**
  - Before visiting the UK only: 7%
  - After visiting the UK only: 11%
  - Before and after visiting the UK: 6%

*Source: International Passenger Survey by ONS, 2016*
Chapter 2: Experiences and perceptions
2.1 Inbound activities

Going shopping is the number one activity which most Chinese visits will feature, followed by dining in restaurants, visiting parks or gardens, museums or galleries, and castles or historic houses. However, it is worth noting that consumer trends suggest that Chinese travellers are becoming less interested in shopping over time, compared to spending on experiences.

Built heritage sites are important attractions for many visitors from China, as well getting more knowledge. About a third of all visits to the UK including following a guided tour; however, the number is higher for holiday visitors at 4 in 10.

Chinese visitors also like to enjoy the green scenery: they are 6% more likely to visit a national park than the all-market average. The Chinese also have a special interest in British football teams.

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

1. Going shopping
2. Dining in restaurants
3. Visiting parks or gardens
4. Visiting museums or art galleries
5. Visiting castles or historic houses
6. Going on a guided tour
7. Visiting religious buildings
8. Sightseeing famous monuments/ buildings
9. Socialising with locals
10. Going to the pub

For more information on activities, please consult the VisitBritain activities page.

Source: International Passenger Survey by ONS, rankings based on 2008-2017 data
2.1 Inbound activities

**Propensity to go shopping**

- Holiday: went shopping
  - China: 73%
  - All markets: 69%
- All journey purposes: went shopping
  - China: 72%
  - All markets: 54%

**Propensity to go to a spa or beauty centre**

- Holiday: went to a spa or beauty centre
  - China: 5%
  - All markets: 3%
- All journey purposes: went to a spa or beauty centre
  - China: 5%
  - All markets: 2%

*Source: International Passenger Survey by ONS, 2017*

**Propensity to purchase selected items**

- Clothes or shoes
  - China: 41%
  - All markets: 54%
- Personal accessories e.g. jewellery
  - China: 10%
  - All markets: 19%
- Bags, purses etc
  - China: 9%
  - All markets: 12%
- Cosmetics or toiletries e.g. perfume
  - China: 13%
  - All markets: 26%
- Books or stationery
  - China: 9%
  - All markets: 13%
- Games, toys or gifts for children
  - China: 11%
  - All markets: 21%
- Food or drink
  - China: 24%
  - All markets: 28%
- CDs, DVDs, computer games etc
  - China: 5%
  - All markets: 6%
- Electrical or electronic items e.g. camera
  - China: 3%
  - All markets: 3%
- Items for your home e.g. furnishing
  - China: 3%
  - All markets: 3%
- Other holiday souvenir
  - China: 16%
  - All markets: 18%
- None of these
  - China: 24%
  - All markets: 38%

*Source: International Passenger Survey by ONS, 2013*
## 2.1 Inbound activities

### Propensity to go to a pub, and socialise with the locals

<table>
<thead>
<tr>
<th>Purpose</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday: socialising with the locals</td>
<td>23%</td>
<td>32%</td>
</tr>
<tr>
<td>Holiday: went to pub</td>
<td>17%</td>
<td>48%</td>
</tr>
<tr>
<td>Business: socialising with the locals</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Business: went to pub</td>
<td>14%</td>
<td>24%</td>
</tr>
<tr>
<td>All journey purposes: socialising with the locals</td>
<td>26%</td>
<td>32%</td>
</tr>
<tr>
<td>All journey purposes: went to pub</td>
<td>23%</td>
<td>42%</td>
</tr>
</tbody>
</table>

### Propensity to go dining in restaurants, or to go to bars or night clubs

<table>
<thead>
<tr>
<th>Purpose</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday: went to bars or night clubs</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>Holiday: dining in restaurants</td>
<td>8%</td>
<td>70%</td>
</tr>
<tr>
<td>Business: went to bars or night clubs</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Business: dining in restaurants</td>
<td>5%</td>
<td>69%</td>
</tr>
<tr>
<td>All journey purposes: went to bars or night clubs</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>All journey purposes: dining in restaurants</td>
<td>23%</td>
<td>61%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, 2008 (dining in restaurants), 2017 (other activities)
2.1 Inbound activities

Propensity to visit museums and art galleries or go on a guided tour

- Holiday: went on a guided tour: China 40%, All markets 29%
- Holiday: visited museums and art galleries: China 56%, All markets 48%
- All journey purposes: went on a guided tour: China 31%, All markets 15%
- All journey purposes: visited museums and art galleries: China 44%, All markets 28%

Propensity to visit built heritage sites

- VFR: visited religious buildings: China 18%, All markets 24%
- VFR: visited castles/historic houses: China 39%, All markets 35%
- Holiday: visited religious buildings: China 41%, All markets 48%
- Holiday: visited castles/historic houses: China 55%, All markets 48%
- Business: visited religious buildings: China 7%, All markets 4%
- Business: visited castles/historic houses: China 18%, All markets 18%
- All journey purposes: visited religious buildings: China 20%, All markets 29%
- All journey purposes: visited castles/historic houses: China 28%, All markets 43%

Source: International Passenger Survey by ONS, 2017 ('went on a guided tour'), and 2016 (other activities)
2.1 Inbound activities

Propensity to visit literary, music, TV or film locations

- Holiday: visited literary, music, TV, or film locations:
  - China: 6%
  - All markets: 9%

- All journey purposes: visited literary, music, TV, or film locations:
  - China: 7%
  - All markets: 5%

Propensity to take part in sports activities

- Holiday: took part in sports activities:
  - China: 3%
  - All markets: 3%

- All journey purposes: took part in sports activities:
  - China: 2%
  - All markets: 2%

Source: International Passenger Survey by ONS, 2017 (top chart), 2011 (bottom chart)

Propensity to visit a park/garden or a national park

- Holiday: visited a National Park:
  - China: 18%
  - All markets: 11%

- Holiday: visited parks or gardens:
  - China: 54%
  - All markets: 50%

- All journey purposes: visited a National Park:
  - China: 13%
  - All markets: 7%

- All journey purposes: visited parks or gardens:
  - China: 44%
  - All markets: 32%

Source: International Passenger Survey by ONS, 2016
2.1 Inbound activities

Propensity to attend the performing arts

- **Holiday: went to the theatre/musical/opera/ballet**
  - China: 15%
  - All markets: 14%
- **Holiday: attended a festival**
  - China: 4%
  - All markets: 4%
- **Holiday: attended a live music event**
  - China: 5%
  - All markets: 10%
- **All journey purposes: went to the theatre/musical/opera/ballet**
  - China: 9%
  - All markets: 12%
- **All journey purposes: attended a festival**
  - China: 3%
  - All markets: 5%
- **All journey purposes: attended a live music event**
  - China: 7%
  - All markets: 7%

Source: International Passenger Survey by ONS, 2017 (live music), 2016 (other performing arts), and 2013 (watching live football)

Number who went to watch football live during trip (000s)

- **VFR**
  - China: 1.7
  - All markets: 1.8
  - Business: 2.2
2.2 Welcome and recommending Britain

Feeling of ‘welcome’ in Britain

<table>
<thead>
<tr>
<th></th>
<th>China</th>
<th>All market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Welcome</td>
<td>80%</td>
<td>82%</td>
</tr>
<tr>
<td>Welcome</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Neither</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Unwelcome</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Very Unwelcome</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Likelihood to recommend Britain

<table>
<thead>
<tr>
<th></th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely likely</td>
<td>73%</td>
<td>69%</td>
</tr>
<tr>
<td>Likely</td>
<td>23%</td>
<td>26%</td>
</tr>
<tr>
<td>Neutral</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Not likely</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Not likely at all</td>
<td>0.2%</td>
<td>0.4%</td>
</tr>
</tbody>
</table>

Chinese holiday visitors are slightly less likely than the average all-market visitor to feel ‘very’ welcome in Britain, but none felt unwelcome either. They would also be slightly more ‘extremely’ likely to recommend Britain for a holiday or a short break to people around them once back at home, than the average across all markets.

Source: CAA 2016
Source: International Passenger Survey by ONS, 2015
2.3 Perceptions of Britain

The Chinese rate Britain highly overall: they ranked the UK nation brand second overall among 50 nations in 2018, as well as second for tourism, its culture, and its people. Chinese people also ranked Britain 3rd for its cultural and built heritage, its contemporary culture, its vibrant city life, and country they would like to visit if money were no object. However, their perceptions of the British scenic natural beauty is weaker: they ranked Britain 15th out of 50 nations on this attribute.

Chinese travellers would be most likely to expect a trip to Britain to be ‘educational’ and ‘fascinating’.

They are interested in famous cultural symbols: the Royal Family, Shakespeare, Sherlock Holmes, Harry Potter and Downton Abbey. Australia and France are the destinations that the Chinese consider the ‘best place’ for delivering many of the aspects they want from a holiday destination. Areas of strength for Britain include the ease of getting around the country as well as its historic sites.

Cultural attractions are the top motivation for Chinese visitors to come to Britain.

*Source:* Anholt Nation Brands Index 2018 (powered by Ipsos), VisitBritain/Olive Insight 2015, Arkenford 2013
### 2.3 Perceptions of Britain

Britain’s ranking (out of 50 nations)

<table>
<thead>
<tr>
<th>Measure</th>
<th>Chinese respondents</th>
<th>All respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall Nation Brand</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culture (overall)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The country has a rich cultural heritage</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>The country is an interesting and exciting place for contemporary culture such as music, films, art and literature</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>The country excels at sports</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td><strong>People (overall)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If I visited the country, the people would make me feel welcome</td>
<td>5</td>
<td>15</td>
</tr>
<tr>
<td><strong>Tourism (overall)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Would like to visit the country if money was no object</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>The country is rich in natural beauty</td>
<td>15</td>
<td>24</td>
</tr>
<tr>
<td>The country is rich in historic buildings and monuments</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>The country has a vibrant city life and urban attractions</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

*Source: Anholt Nation Brands Index 2018 (powered by Ipsos)*
2.3 Perceptions of Britain

Cultural associations

<table>
<thead>
<tr>
<th>Activity</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museums</td>
<td>40%</td>
<td>47%</td>
</tr>
<tr>
<td>Music</td>
<td>26%</td>
<td>39%</td>
</tr>
<tr>
<td>Films</td>
<td>29%</td>
<td>39%</td>
</tr>
<tr>
<td>Sports</td>
<td>27%</td>
<td>37%</td>
</tr>
<tr>
<td>Modern Design</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Pop videos</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>Opera</td>
<td>19%</td>
<td>25%</td>
</tr>
<tr>
<td>Sculpture</td>
<td>16%</td>
<td>25%</td>
</tr>
<tr>
<td>Street Carnival</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Circus</td>
<td>13%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Adjectives describing a potential trip to Britain

<table>
<thead>
<tr>
<th>Adjective</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational</td>
<td>28%</td>
<td>35%</td>
</tr>
<tr>
<td>Fascinating</td>
<td>25%</td>
<td>31%</td>
</tr>
<tr>
<td>Exciting</td>
<td>21%</td>
<td>31%</td>
</tr>
<tr>
<td>Romantic</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>Relaxing</td>
<td>17%</td>
<td>22%</td>
</tr>
<tr>
<td>Spiritual</td>
<td>8%</td>
<td>20%</td>
</tr>
<tr>
<td>Boring</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Stressful</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>Risky</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Depressing</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Anholt Nation Brands Index 2018 (powered by Ipsos)
## 2.3 Perceptions of Britain

Holiday wants and % saying destination is best place for...

<table>
<thead>
<tr>
<th>Importance</th>
<th>Attribute (20 most important)</th>
<th>UK</th>
<th>France</th>
<th>Italy</th>
<th>Australia</th>
<th>US</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.44</td>
<td>Enjoy the beauty of the landscape</td>
<td>25%</td>
<td>48%</td>
<td>47%</td>
<td>64%</td>
<td>35%</td>
<td>23%</td>
</tr>
<tr>
<td>6.42</td>
<td>Feel connected to nature</td>
<td>15%</td>
<td>26%</td>
<td>22%</td>
<td>66%</td>
<td>34%</td>
<td>20%</td>
</tr>
<tr>
<td>6.40</td>
<td>Have fun and laughter</td>
<td>15%</td>
<td>35%</td>
<td>15%</td>
<td>70%</td>
<td>23%</td>
<td>18%</td>
</tr>
<tr>
<td>6.38</td>
<td>Chill/ slow down to a different pace of life</td>
<td>26%</td>
<td>50%</td>
<td>33%</td>
<td>62%</td>
<td>30%</td>
<td>16%</td>
</tr>
<tr>
<td>6.38</td>
<td>Be physically healthier</td>
<td>30%</td>
<td>44%</td>
<td>35%</td>
<td>66%</td>
<td>40%</td>
<td>27%</td>
</tr>
<tr>
<td>6.35</td>
<td>See world famous sites and places</td>
<td>46%</td>
<td>62%</td>
<td>58%</td>
<td>49%</td>
<td>46%</td>
<td>29%</td>
</tr>
<tr>
<td>6.32</td>
<td>Soak up the atmosphere</td>
<td>23%</td>
<td>44%</td>
<td>35%</td>
<td>55%</td>
<td>23%</td>
<td>26%</td>
</tr>
<tr>
<td>6.24</td>
<td>It offers unique holiday experiences</td>
<td>39%</td>
<td>56%</td>
<td>50%</td>
<td>63%</td>
<td>43%</td>
<td>34%</td>
</tr>
<tr>
<td>6.23</td>
<td>Enjoy peace &amp; quiet</td>
<td>28%</td>
<td>40%</td>
<td>28%</td>
<td>66%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>6.23</td>
<td>Offers good value for money</td>
<td>36%</td>
<td>52%</td>
<td>43%</td>
<td>60%</td>
<td>42%</td>
<td>32%</td>
</tr>
<tr>
<td>6.21</td>
<td>Experience activities/places with a wow factor</td>
<td>33%</td>
<td>47%</td>
<td>35%</td>
<td>54%</td>
<td>46%</td>
<td>21%</td>
</tr>
<tr>
<td>6.19</td>
<td>Experience things that are new to me</td>
<td>29%</td>
<td>55%</td>
<td>45%</td>
<td>59%</td>
<td>37%</td>
<td>24%</td>
</tr>
<tr>
<td>6.17</td>
<td>Enjoy local specialities (food and drink)</td>
<td>29%</td>
<td>70%</td>
<td>69%</td>
<td>39%</td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>6.15</td>
<td>Get some sun</td>
<td>31%</td>
<td>48%</td>
<td>37%</td>
<td>73%</td>
<td>34%</td>
<td>20%</td>
</tr>
<tr>
<td>6.14</td>
<td>Visit a place with a lot of history/historic sites</td>
<td>48%</td>
<td>73%</td>
<td>64%</td>
<td>22%</td>
<td>21%</td>
<td>28%</td>
</tr>
<tr>
<td>6.14</td>
<td>Enjoy high quality food and drink (gourmet food)</td>
<td>23%</td>
<td>67%</td>
<td>61%</td>
<td>24%</td>
<td>38%</td>
<td>19%</td>
</tr>
<tr>
<td>6.14</td>
<td>Provides a wide range of holiday experiences</td>
<td>37%</td>
<td>54%</td>
<td>45%</td>
<td>59%</td>
<td>52%</td>
<td>31%</td>
</tr>
<tr>
<td>6.09</td>
<td>The people are friendly and welcoming</td>
<td>33%</td>
<td>49%</td>
<td>42%</td>
<td>54%</td>
<td>40%</td>
<td>32%</td>
</tr>
<tr>
<td>6.08</td>
<td>Do what I want when I want spontaneously</td>
<td>28%</td>
<td>26%</td>
<td>17%</td>
<td>27%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>6.08</td>
<td>Broaden my mind/ Stimulate my thinking</td>
<td>32%</td>
<td>61%</td>
<td>40%</td>
<td>48%</td>
<td>51%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Arkenford 2013
## 2.3 Perceptions of Britain

Holiday wants and % saying destination is best place for...

<table>
<thead>
<tr>
<th>Importance</th>
<th>Attribute (20 least important)</th>
<th>UK</th>
<th>France</th>
<th>Italy</th>
<th>Australia</th>
<th>US</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.07</td>
<td>Do something the children would really enjoy</td>
<td>37%</td>
<td>45%</td>
<td>36%</td>
<td>63%</td>
<td>54%</td>
<td>30%</td>
</tr>
<tr>
<td>6.07</td>
<td>Have dedicated time with my other half</td>
<td>35%</td>
<td>54%</td>
<td>37%</td>
<td>60%</td>
<td>38%</td>
<td>30%</td>
</tr>
<tr>
<td>6.00</td>
<td>Easy to get around by public transport</td>
<td>54%</td>
<td>56%</td>
<td>43%</td>
<td>48%</td>
<td>63%</td>
<td>51%</td>
</tr>
<tr>
<td>5.96</td>
<td>Explore the place</td>
<td>15%</td>
<td>50%</td>
<td>37%</td>
<td>49%</td>
<td>48%</td>
<td>23%</td>
</tr>
<tr>
<td>5.88</td>
<td>Good shopping</td>
<td>38%</td>
<td>66%</td>
<td>48%</td>
<td>41%</td>
<td>64%</td>
<td>24%</td>
</tr>
<tr>
<td>5.87</td>
<td>Feel special or spoilt</td>
<td>31%</td>
<td>56%</td>
<td>37%</td>
<td>53%</td>
<td>37%</td>
<td>19%</td>
</tr>
<tr>
<td>5.82</td>
<td>Do something environmentally sustainable</td>
<td>40%</td>
<td>53%</td>
<td>66%</td>
<td>44%</td>
<td>33%</td>
<td>40%</td>
</tr>
<tr>
<td>5.80</td>
<td>A good place to visit at any time of year</td>
<td>26%</td>
<td>45%</td>
<td>40%</td>
<td>60%</td>
<td>41%</td>
<td>24%</td>
</tr>
<tr>
<td>5.79</td>
<td>Revisit places of nostalgic importance to me</td>
<td>21%</td>
<td>37%</td>
<td>39%</td>
<td>12%</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>5.66</td>
<td>Get off the beaten track</td>
<td>21%</td>
<td>57%</td>
<td>39%</td>
<td>36%</td>
<td>34%</td>
<td>46%</td>
</tr>
<tr>
<td>5.63</td>
<td>Meet and have fun with other tourists</td>
<td>30%</td>
<td>72%</td>
<td>42%</td>
<td>59%</td>
<td>45%</td>
<td>31%</td>
</tr>
<tr>
<td>5.56</td>
<td>Fashionable destination</td>
<td>37%</td>
<td>66%</td>
<td>49%</td>
<td>49%</td>
<td>49%</td>
<td>25%</td>
</tr>
<tr>
<td>5.47</td>
<td>Meet the locals</td>
<td>43%</td>
<td>45%</td>
<td>32%</td>
<td>51%</td>
<td>33%</td>
<td>22%</td>
</tr>
<tr>
<td>5.46</td>
<td>Visit places important to my family’s history</td>
<td>30%</td>
<td>43%</td>
<td>25%</td>
<td>34%</td>
<td>31%</td>
<td>13%</td>
</tr>
<tr>
<td>5.42</td>
<td>Do something useful like volunteering to help on a project</td>
<td>34%</td>
<td>28%</td>
<td>29%</td>
<td>57%</td>
<td>38%</td>
<td>27%</td>
</tr>
<tr>
<td>5.41</td>
<td>Experience adrenalin filled adventures</td>
<td>46%</td>
<td>37%</td>
<td>36%</td>
<td>36%</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>5.36</td>
<td>Party</td>
<td>39%</td>
<td>57%</td>
<td>36%</td>
<td>34%</td>
<td>49%</td>
<td>28%</td>
</tr>
<tr>
<td>5.35</td>
<td>Go somewhere that provided lots of laid on entertainment/nightlife</td>
<td>45%</td>
<td>53%</td>
<td>47%</td>
<td>38%</td>
<td>66%</td>
<td>30%</td>
</tr>
<tr>
<td>5.29</td>
<td>Watch a sporting event</td>
<td>42%</td>
<td>33%</td>
<td>58%</td>
<td>40%</td>
<td>44%</td>
<td>40%</td>
</tr>
<tr>
<td>5.18</td>
<td>To participate in an active pastime or sport</td>
<td>26%</td>
<td>54%</td>
<td>51%</td>
<td>35%</td>
<td>31%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Arkenford 2013
2.3 Perceptions of Britain

Motivations for choosing Britain as a holiday destination

Source: VisitBritain/IPSOS 2016, base: visitors (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)
2.3 Perceptions of Britain

Sought-after Britain activities

- Drive through the countryside of England
- Take a canal boat tour through the waterways of England
- Enjoy a traditional afternoon tea
- Explore Britain's history using a historic cities app to uncover the...
- A food tour of one of London's best foodie markets
- Shop for quirky gifts in a seaside town
- Spot wildlife in the Scottish Highlands
- Walk along Hadrian's wall in Northern England
- Ride the scenic 'Hogwarts Express' (Harry Potter train) through the...
- Stay the night in a fairy-tale castle
- Visit Madame Tussauds
- Relax in Bath spa's rooftop pool
- Watch a musical in London's West End
- Take a street art tour in one of Britain's modern cities
- Share stories over a pint with locals in a cosy rural pub
- Visit Windsor Castle where Harry and Meghan got married
- Visit locations from my favourite TV/film shows filmed on location...
- Hunt for The Loch Ness Monster with a boat cruise on Loch Ness
- Watch your favourite movie at a London rooftop cinema
- Experience a zip line adventure in Wales

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. Top 20 activities shown; for full list please see report at understanding international visitors page.
Chapter 3: Understanding the market
3.1 Structural drivers

The Chinese economy is still growing rapidly. In 2018, the number of High Net Worth Individuals (HNWIs, those with investable assets worth more than US$1million) was 1.19m.

With a population of around 1.4 billion, China is still the most populated country in the world. However, with an ageing population, it is set to be overtaken by India by 2030, and the population will start to decline.

The rapid increase of Chinese urban income is expected to drive overall income growth. Spending is broadening beyond consumer staples: Chinese people now spend around 9.2% of their personal spending on “Fun”, which includes travelling (vs. 17.3% in the US).

In 2018, it was estimated that 8% of the Chinese population had a passport. By 2025, this number is expected to reach 12%.

Standard Chinese or Mandarin is the nationwide official language. Some regions may use others though, such as Cantonese (or Yue) which is Guangdong’s official language. China is the 4th largest country in the world: cultures in the different regions and cities vary, as do languages.

3.1 Structural drivers: general market overview

General market conditions

China is the most populated country in the world with 1.4 billion people. It is also the second largest economy in the world, after the USA (in real GDP). The growing white collar ‘Urban Middle’ class* (compared to the blue-collar ‘Urban Mass’) is taking more trips abroad: travelling is high on the wish list of this segment. Ctrip CEO, Jane Sun, predicted at the 2018 Word Economic Forum in Davos that the number of Chinese passport holders could double to reach 240 million by 2020.

Today, 153 destinations hold the ‘Approved Destination Status’ (ADS), which the UK received in 2005, making it possible for Chinese nationals to travel more easily.

Key demographic and economic data

<table>
<thead>
<tr>
<th>Measure (2018)</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (m)</td>
<td>1,428</td>
</tr>
<tr>
<td>GDP per capita PPP (US$)</td>
<td>16,817</td>
</tr>
<tr>
<td>Annual average GDP growth over past decade (%)</td>
<td>7.9</td>
</tr>
<tr>
<td>Annual GDP growth in 2018 (%)</td>
<td>6.6</td>
</tr>
</tbody>
</table>

The EU is China’s largest trading partner, and so European destinations benefit from a good exposure in the market. Tourism is a key part of their bilateral relationship. In 2018, this was reinforced with the EU-China Tourism Year which enhanced travel promotion between the two via simpler visa procedures, increased air connectivity and specific tourism offer for Chinese travellers to Europe.

As travel becomes more and more popular in China, more initiatives and regulations have been launched, such as those yearly partnership with a popular destination. The Chinese currency is the yuan, CNY or RMB. Recently, the Chinese government limited how much Chinese people can withdraw abroad (capped at RMB100,000 per year), or change to a foreign currency (capped at USD50,000 per year).

There are 10 Chinese public holidays per year, including three days for the Spring Festival (in January or February) and three days for the National day (in October). It is customary to work through weekends around these three day holidays and attach days in lieu to form ‘Golden Weeks’.

Source: Oxford Economics, Goldman Sachs’ 2015 Chinese consumer profile, Jing Travel, UNWTO/GTERC Asia Tourism Trends 2018 Edition, Office Holidays *Note: McKinsey defines upper middle class as annual disposable income from 106,000RMB to 229,000RMB, mass middle class as annual disposable income from 60,000RMB to 106,000RMB
3.1 Structural drivers: demographic and social indicators

Population dynamics

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018 estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall growth rate vs. 2017</td>
<td>+0.5%</td>
</tr>
<tr>
<td>Urban population</td>
<td>59.2%</td>
</tr>
<tr>
<td>Urbanisation rate (2015-2020)</td>
<td>2.4% per annum</td>
</tr>
</tbody>
</table>

The Chinese population is set to increase slightly until 2030 when it is forecast to start decreasing. The fertility rate in China is indeed under the threshold for population renewal, as a consequence of the one-child policy, which was changed in October 2015 for a two-child policy. The Chinese population is also showing signs of ageing, with a median age above the global average since 2015.

Capgemini’s World Wealth Report suggests that in 2015 Chinese HNWIs (High Net Worth Individuals) surpassed 1 million people for the first time, and continued growing to 1.189 million HNWIs by 2018. Along with Japan, China leads the wealth growth in Asia Pacific. In terms of HNWI volume, it ranks in 4th place behind the US, Japan and Germany.

Urban population rate is still quite low (59% in 2018). However, it is still increasing. According to the Academy of Social Sciences of China, the middle class* accounts for about 19% of the Chinese people.

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Source: Oxford Economics, UN revised 2019 World Population Prospects
*Note: McKinsey defines upper middle class as annual disposable income from 106,000RMB to 229,000RMB, mass middle class as annual disposable income from 60,000RMB to 106,000RMB
3.1 Structural drivers: economic indicators

The Chinese economy has dramatically changed over recent decades and the economy of the world’s most populated country keeps growing. In recent years economic growth has slowed down from previous highs. This slowdown is monitored and paced to achieve a more sustainable growth, driven by domestic consumption and promotion of the service industry (as opposed to manufacturing, exports and investment).

The UK ranks second for both imports and exports of merchandise from and to China among European countries in 2017 respectively.

McKinsey predicts that Beijing and Shanghai are set to have among the largest rates of consumption growth between 2015 and 2030. Chongqing, Guangzhou and Shenzhen are on McKinsey’s top cities list in terms of household consumption of services in China. Tianjin, which also offers direct, stopping flights to the UK, is also quoted as a key city for urban consumption growth.

The development of communication technologies also benefit to the economic growth of some cities, such as Shenzhen, nicknamed the Chinese silicon valley.

In the first half of 2019, six Chinese cities exceeded a GDP exceeding 1 trillion yuan – Shanghai, Beijing, Shenzhen, Guangzhou, Chongqing and Tianjin.


<table>
<thead>
<tr>
<th>Indicator</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real GDP</td>
<td>6.8</td>
<td>6.6</td>
<td>6.1</td>
<td>5.7</td>
</tr>
<tr>
<td>Consumer spending</td>
<td>6.7</td>
<td>7.2</td>
<td>6.8</td>
<td>6.5</td>
</tr>
<tr>
<td>Unemployment rate</td>
<td>3.9</td>
<td>3.8</td>
<td>3.6</td>
<td>3.6</td>
</tr>
</tbody>
</table>
3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in CNY/RMB)

Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source. Bank of England
3.2 Consumer trends

More and more Chinese people have access to travel thanks to economic growth and the rise of Chinese purchasing power, especially in the main cities. Today, the Chinese State Council estimate there are 120 million passport holders in China, and some think that this might double by 2020.

As Chinese travellers are getting more like their Western counterparts, new trends emerge. With new visa-free destinations or easier application processes, the FIT segment is growing (only 20% of the outbound market is composed of package tourists). Family travel, experiences and winter sports are also gaining momentum.

Tour groups and organised trips are still dominant though: residents of lower tier cities are newer to travelling abroad, and still need more guidance. But mobile/digital capabilities has significantly impacted travel behaviours, including a shorter planning phase and greater tendencies to make bookings on the spot or during the journey.

3.2 Consumer trends: overall travel trends

Motivation and attitudes to holidays

China’s outbound market is booming. There should be about 100 million overnight visits from China overseas in 2018, making it the third largest market in volume of international arrivals after the US and Germany. It is forecast to overtake Germany in the next 5 years.

The rising urban middle class in China is primarily responsible for the growth of the outbound travel market. In 2013, about 11% of China’s population could be considered as part of the middle class. With 9% of Chinese personal spending going on recreational activities, spending on ‘fun’ activities, which includes travel, is much lower than in other countries. However, the young urban mass affluent segment, which is set to grow in the coming years, are spending more on these activities, creating a sizeable growth opportunity for the Chinese outbound market. Overall, Chinese millennials are more likely than previous generations to spend rather than save.

Millennials and Gen Z Chinese, often only children of increasingly affluent tier-1 cities’ residents, are usually educated and often have a higher disposable income than their parents had. They might still live with their parents, and thus would have more to spend on travel.

Tier-3 and tier-4 cities are gaining greater access to overseas travel: 66 new airports were under construction or planned for across China in 2018. The government plays a key role in the development of the Chinese outbound market, supporting the development of new infrastructure, granting destinations access to the ADS (‘Approved Destination Status’) scheme, or launching tourism initiatives, such as the bilateral tourism years.

2018 was the EU-China tourism year. This helped draw both markets closer in terms of tourism and investment, with European countries, including the UK, Italy and France, lowering the threshold for the approval of certain visas and simplifying the visa issuing procedure to attract more Chinese tourists. The Belt and Road initiative has also benefitted some lesser known destinations in Europe, highlighting them to Chinese travellers.

As those in the top tier cities are becoming more mature travellers, they are looking for more unique experiences and destinations. They also become more and more independent in the planning of their trip, thanks to the information available on their smartphones.

3.2 Consumer trends: rise of the FIT travellers

Millennials and Gen Z are leading growth

Millennials and Gen Z travellers are highly represented in China. The country’s birth rates were higher in 1985-1995, and it boasts the second largest Gen Z group in the world. Both groups live in top-tier Chinese cities and tend to be experienced travellers as they have more disposable income than previous generations, some having even studied abroad. Chinese Gen Z’s households have a higher average income than their Indian counterparts. They spend more on entertainment and travel than other age groups in China. 70% of bookings on Chinese travel giant Ctrip are made via mobile, which may be linked to this audience’s influence.

Technology solutions to which their parents did not have access to enable those travellers to fulfil their desire for more control and ownership of their trips. Thus, they can be more adventurous whilst reassured, having all information just in a few clicks.

Across China, 28% of all international travellers will still prefer to ‘purchase a pre-planned tour to handle all accommodation and tour guides’. However, millennials would mostly pick ‘purchase a package, but travel on my own without a guide’, ‘purchase my travel arrangements on my own, but hire a tour guide or driver’, or ‘completely on my own with no package tour or tour guide’

Mobile technologies also allow millennials to be more confident travelling on their own, or picking more adventurous, unique destinations and experiences.

In China, VisitBritain focuses on two audience segments among the international travellers. Buzzseekers are most likely to be aged 25-34, and so their attitudes and behaviours reflect the Millennial market:

**Buzzseekers in China:** affluent and seasoned travellers; opinion leaders of their friends and social contacts, who prefer premium experiences and adventures.

3.2 Consumer trends: luxury travel trends

Travel trends among the more affluent travellers

China is the most valuable outbound market in the world: Chinese travellers spent a total US$277.3 billion abroad in 2018. When in the UK, they spend over 3 times the all-market average per visit.

The luxury travel segment is key in this market, with Mass Affluent and HNWI* people being an important group among Chinese travellers. Chinese luxury travellers tend to be younger than the global profile, and so their trends are similar to trends of millennials travellers, such as the importance of experiences.

50% or more of Chinese luxury travellers would define a ‘luxury trip’ by a trip including ‘premium/exclusive food and drinks experiences’, ‘VIP treatment/excellent service from all touch points’, and ‘accommodation in a location that will astonish’. It is followed by ‘unique and exclusive experiences’ and ‘time to enjoy and lose oneself in the place visited’.

Shopping is no longer the prime motivation to travel, but most would still be likely to search for a bargain at a luxury outlet village.

Chinese luxury travellers associate Britain with classic and royal attributes, so they would enjoy visiting royal buildings in a unique way, or staying at historic houses or stately homes. British university cities (Oxford, Cambridge) also hold a luxury appeal for them.

Top 10 experiences in a luxury holiday

Source: UNWTO, International Passenger Survey by ONS, VB/Kantar Millward Brown 2017 research

* See definitions in appendix
3.3 Booking and planning

Chinese travellers have a very short lead-in time: 75% of Chinese visitors to Britain booked their trip within 2 months of their departure.

However, 53% had decided to visit Britain at least 3 months before their date of travel.

They are more likely than average to plan their trip with precision before leaving their country.

When travelling to Britain, they would prefer to book travel and accommodation together, mostly online.

They would also be more likely to purchase tickets for their activities before they travel.

Source: VisitBritain/IPSOS 2016, base: visitors (if not otherwise specified)
### 3.3 Booking and planning: booking channels and ticket sales

#### How trips to Britain were booked: travel only

<table>
<thead>
<tr>
<th>Booking method</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>80%</td>
<td>85%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>By phone</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>5%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Online bookings are the Chinese travellers’ favourite booking methods when arranging their travel to Britain. Chinese visitors to Britain still tend to book their travel to Britain and accommodation together (71% of visitors). Among those who booked them separately, the Chinese share of visitors who stayed with friends or relatives is on par with the all-market average.

#### How trips to Britain were booked: accommodation only

<table>
<thead>
<tr>
<th>Booking method</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>69%</td>
<td>70%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>By phone</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Did not book/stayed with friends/relatives</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

#### How trips to Britain were booked: travel and accommodation (holiday)

<table>
<thead>
<tr>
<th>Booking method</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>82%</td>
<td>64%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>13%</td>
<td>27%</td>
</tr>
<tr>
<td>By phone</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, base: visitors (if not otherwise specified), online survey
3.3 Booking and planning: booking channels and ticket sales

Propensity to make a purchase before or during trip

Chinese visitors tend to book their various travel elements before they start their journey, especially for guided sightseeing tours and tickets to other tourist attractions. 89% of Chinese international travellers tend to plan their holiday abroad carefully before they leave China, which is above the all-market average (70%).

Source: VisitBritain/IPSOS 2016, base: visitors (if not otherwise specified), online survey
### 3.3 Booking and planning: lead-times

#### Decision lead-time for visiting Britain

<table>
<thead>
<tr>
<th>Starting to think about trip</th>
<th>Lead time</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6+ months</td>
<td>42%</td>
<td>49%</td>
</tr>
<tr>
<td></td>
<td>3-6 months</td>
<td>33%</td>
<td>31%</td>
</tr>
<tr>
<td></td>
<td>1-2 months</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>Less than 1 month</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>Don’t know</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Deciding on the destination</th>
<th>Lead time</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6+ months</td>
<td>18%</td>
<td>32%</td>
</tr>
<tr>
<td></td>
<td>3-6 months</td>
<td>34%</td>
<td>38%</td>
</tr>
<tr>
<td></td>
<td>1-2 months</td>
<td>30%</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td>Less than 1 month</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Don’t know</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Looking at options/prices</th>
<th>Lead time</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6+ months</td>
<td>10%</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td>3-6 months</td>
<td>24%</td>
<td>37%</td>
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<tr>
<td></td>
<td>1-2 months</td>
<td>35%</td>
<td>27%</td>
</tr>
<tr>
<td></td>
<td>Less than 1 month</td>
<td>29%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>Don’t know</td>
<td>2%</td>
<td>4%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Booking the trip</th>
<th>Lead time</th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6+ months</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td></td>
<td>3-6 months</td>
<td>13%</td>
<td>32%</td>
</tr>
<tr>
<td></td>
<td>1-2 months</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td></td>
<td>Less than 1 month</td>
<td>44%</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td>Don’t know</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, base: visitors
3.3 Booking and planning: lead-times

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

The Chinese tend to think about a trip to Britain fairly far in advance as 42% of visitors to Britain started to think about it more than six months before the trip. An additional 33% did so in the three to six months window before the trip. Just over half had decided to travel to Britain either three months before their trip or earlier. This is below the all-market average, showing the short lead-in time of Chinese travellers to Britain.

They also start looking at options and prices for their trip to Britain later than the all-market average with about a third doing so 3 months or more in advance of their trip, about another one-in-three 1-2 months before, and the rest less than 1 month before.

Finally, 75% of Chinese visitors to Britain had booked their trip within 2 months of the trip.

Booking through a travel agent, tour operator or travel comparison website is usually preferred to booking directly with the carrier/provider, whether Chinese visitors to Britain chose to book travel and accommodation together or separately.

Source: VisitBritain/IPSOS 2016, base: visitors
3.4 Reaching the consumer

Talking to friends, relatives and colleagues is the key source of influence for Chinese travellers trying to decide on their holiday destination.

Travel agents or tour operators – whether through direct advice or via websites – have almost as much influence as word-of-mouth.

Travellers’ destination reviews on websites completes the Chinese top 3 influences*.

Compared to other markets, Chinese travellers tend to be more influenced by TV travel programmes, TV adverts, and also their traditional travel agent or tour operator through discussions or their brochures.

Almost 1-in-2 Chinese people said they have travelled for a holiday to a place they had chosen at least in part because it featured in a TV series or film. A further 4-in-10 would also consider doing so.

Word-of-mouth

#1 Influence for the destination choice of Chinese international travellers – followed by travel agents/operators

Source: VisitBritain/IPSOS 2016, Anholt Nation Brands Index 2017

* Considering talking to friends, relatives and colleagues directly or on social media as only one same source of influence.
3.4 Reaching the consumer: traditional media

The Chinese are highly exposed to media and increasingly media driven overall, but outlets operate under tight control. The opening up of the industry has extended to distribution and advertising, but not necessarily to editorial content.

Broadcast and digital media

Most households own a TV set. There are over 3,300 local, regional and national TV channels in China, and over 2,600 radio stations. All are state-owned.

Main radio broadcaster include China National Radio and China Radio International. The biggest TV players are:

- China Central TV (CCTV), largest broadcast media in China with national coverage, state-run and based in Beijing but with overseas offices, including in London.
- China Global TV Network (CGTN), a state-run international broadcaster with networks in 5 other international languages, including French and English.

Regional TV stations, with support of satellites, are gaining more popularity with a focus on lifestyle and entertainment programmes.

China is also the largest cable TV market in the world with over 216 million subscribers.

Main players are Tencent and Baidu. Most traditional TV channels and radio stations have to face the competition of streaming and OTT companies, like iQiyi, Youku, Tudou and Sohu.

3.4 Reaching the consumer: traditional media

The Chinese are highly exposed to media and increasingly media driven overall, but outlets operate under tight control. The opening up of the industry has extended to distribution and advertising, but not necessarily to editorial content.

Print media

China is the third largest publishing sector for exporters, after the US and Germany. However, it is very fragmented with around 1,900 newspapers.

There are also over 40 major press conglomerates publishing 100 million copies of newspapers every day. There are over 10,000 magazines across China. However, it is mostly state-controlled: city newspapers are usually owned by local government or the local Communist Party. Sensitive information is monitored and can eventually be censored, but it might depend on the city, or region. However, tourism information is not considered sensitive.

Travel magazines are popular, such as World Traveler (or The Traveler in Chinese) with the middle class. Again, online support is challenging the market situation as many of them are being digitised to gain more market share and penetration. Conde Nast Traveller and Harper’s Bazaar Chinese editions are good examples of this.

3.4 Reaching the consumer: online media

**Internet use**
China is the world's largest online population with 772 million Internet users and an Internet penetration rate of about 56% in December 2017, according to the China Internet Network Information Centre (CNNIC).

A system nicknamed the “Great Firewall of China” can block access to foreign or domestic websites, filtering URLs or censoring some keywords.

Three main players are known as “BAT”:
- Baidu: top search engine,
- Alibaba: e-commerce leader, allied with Sina which operates the Weibo microblog platform,
- Tencent: WeChat instant message platform.

According to CNNIC, 49% of Internet users use the Internet for travel booking (as of December 2017). This represents a 26% increase on December 2016 levels.

**Mobile predominance:**
The CNNIC says 97.5% of China's online population can access the internet via a smartphone or a tablet (753 million people as of December 2017).

Mobile payments are becoming more and more popular in China, especially among millennials. They now represent a US$16 trillion market overall, led by Alipay and WeChat Pay.

Source: BBC’s China profile - Media, CNNIC’s 41st report (January 2018), Business Insider UK, Kantar Media CIC’s 2018 China Social Media Landscape
3.4 Reaching the consumer: online media

Social media
The Chinese social media landscape is very unique. Many international players like Facebook are blocked in China, and state control seems to be increasing in recent years. The main actors are local, and usually either messaging, blogging or microblogging services. In December 2017 720 million people used instant message services in China (93% of the netizen population).

Popular messaging apps and platforms include WeChat, and QQ.

Popular blog platforms include WeChat Moments and Weibo.

Popular video platforms include Youku, iQiYi and Douyin/Tik Tok.

Volume of main Internet platforms (in million users)

- Baidu Search: 700
- Baidu Tieba: 600
- Taobao & Tmall: 540
- Xianyu: 200
- Alipay: 870
- WeChat: 1,040
- QQ: 806
- Weibo: 392
- Toutiao: 700
- Douyin: 300

Source: BBC's China profile - Media, CNNIC's 41st report (January 2018), Business Insider UK, Kantar Media CIC's 2018 China Social Media Landscape
3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

- To keep in touch with people at home: 44% (China), 49% (All markets)
- To post/upload photos of my holiday: 39% (China), 49% (All markets)
- Look for recommendations for places to eat or drink: 30% (China), 56% (All markets)
- I have not used social media at all on this type of holiday: 19% (China), 29% (All markets)
- Share with others where you are/what you are doing while on holiday: 29% (China), 50% (All markets)
- To let people know where I am at a given moment (e.g. checking in on Facebook): 30% (China), 25% (All markets)
- To help you plan/decide where to go or what to see or what to do: 25% (China), 37% (All markets)
- To ask for advice on where to go or what to do: 23% (China), 43% (All markets)
- Share my own advice or recommendations about visiting where I am: 19% (China), 42% (All markets)

Chinese travellers tend to use more social media on holidays than the all-market average: only 19% of Chinese international travellers have not used social media during their last holiday abroad, compared to 29% across all markets.

88% of Chinese international travellers regard their smartphone as essential whilst they are on holiday, and 65% their tablet.

82% of Chinese travellers like to be able to stay connected when they are on holidays, with 87% wishing it were cheaper to use their smartphone abroad.

While on holiday, the Chinese tend to use more social media than the average international traveller, especially when finding or sharing recommendations on where to go to eat, drink or visit.

Source: VisitBritain/IPSOS 2016, base: all respondents
3.4 Reaching the consumer: influences

Influences on destination choice

Talking to friends / relatives / colleagues
Looking at prices of holidays/flights on price comparison websites
Websites providing traveller reviews of destinations [e.g. Tripadvisor]
Talking to friends or family in your social network (e.g. via Facebook / Twitter)
An accommodation provider/ hotel website
A travel guidebook
Travel agent or tour operator website
Travel blogs / forums
Travel programme on TV
A special offer or price deal you saw advertised offline e.g. in a newspaper, magazine or on TV
Travel agent or tour operator brochure
An official tourist organisation website or social media site for the country or destination
An official tourist brochure for the country / city / region
A travel feature / article in a magazine or newspaper
Direct advice from a travel agent/tour operator (face-to-face, over the phone)
Images or videos your friends or family have posted to social media
Images / information in online adverts
Images / information in adverts in a magazine or newspaper
A special offer or price deal you saw advertised online e.g. in a newspaper, magazine or on TV
Images or videos from a photo/video sharing social network site
Image / video on online ads
Travel app
Articles on an online encyclopaedia e.g. Wikipedia, Wikitravel
Images / information in TV adverts
Seeing social media posts from celebrities talking about their holiday destinations
Images / information on billboards / poster adverts
Travel programme on radio
Information in radio adverts

Source: VisitBritain/IPSOS 2016, base all respondents. (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

<table>
<thead>
<tr>
<th></th>
<th>China</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have visited, film/TV main reason</td>
<td>19%</td>
<td>6%</td>
</tr>
<tr>
<td>Have visited, film/TV some influence</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Have visited, film/TV no influence</td>
<td>28%</td>
<td>35%</td>
</tr>
<tr>
<td>Not visited, but interested. Film/TV main reason</td>
<td>31%</td>
<td>6%</td>
</tr>
<tr>
<td>Not visited but interested. Film/TV some influence</td>
<td>1%</td>
<td>16%</td>
</tr>
<tr>
<td>Not visited and not interested</td>
<td>1%</td>
<td>22%</td>
</tr>
</tbody>
</table>

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?
Chapter 4: Access and travel trade
4.1 Access: key facts

Most Chinese travel to the United Kingdom by plane. A growing number of carriers are serving this route directly, and some recently converted their seasonal flights to the UK into year-round services.

Seat capacity on direct flights from China to the UK has increased steadily since 2010 and by 2018 capacity had more than doubled in ten years. However, this has led to some concern around sustainability of new routes, with less satisfactory performance under review.

Chinese visitors departing Britain by air pay £78 in Air Passenger Duty when travelling in economy class.

Several of the largest cities in China boast direct routes to the UK, with new flights from Sanya, Changsha, Shenzhen, Wuhan, and Xi’an added in 2018, as well as a renewed route from Chengdu.

Outside of London, Manchester had been the only UK city served by direct, non-stop routes from China, until a new route was announced to Edinburgh from Beijing, launched in June 2018 by Hainan Airlines.

9% of Chinese visitors depart via the Eurostar or ferry, visiting the UK and continental Europe in the same trip.

Source: International Passenger Survey by ONS, Apex, *non-stop flights only, 2018 provisional data as of October 2019

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly aircraft departures</td>
<td>70</td>
</tr>
<tr>
<td>Weekly seat capacity on air routes</td>
<td>18,583</td>
</tr>
<tr>
<td>Airports with direct routes in China</td>
<td>12</td>
</tr>
<tr>
<td>Airports with direct routes in Britain</td>
<td>4</td>
</tr>
</tbody>
</table>
4.1 Access: mode of transport

Visits by mode of transport (average annual visits in 000s in rolling 3 years ending in year shown)

Sea and tunnel travel (000s, 2016-2018 average)

Annual share by mode (2016-2018)

Source: International Passenger Survey by ONS
4.1 Access: capacity

Annual airline seat capacity trends

Airline annual seat capacity by carrier (2018)

Source: Apex Rdg: non-stop flights only, provisional data as of October 2019
4.1 Access: capacity

Origin airport annual seat capacity (2018)

- Beijing - Capital: 41%
- Shanghai - Pu Dong: 34%
- Changsha: 9%
- Xi'an Xianyang International: 3%
- Chengdu: 3%
- Shenzhen: 2%
- Qingdao: 2%
- Wuhan Tianhe International: 2%
- Sanya Phoenix International: 2%
- Qingdao: 1%
- Xi'an Xianyang International: 1%
- Changsha: 1%

Destination airport seat capacity (2018)

- London - Heathrow: 89%
- Manchester International: 5%
- Edinburgh: 4%
- London - Gatwick: 5%

Source: Apex Rdc: non-stop flights only
4.2 Travel trade: general overview

The Home Office recognised over 200 travel agents under the ‘Approved Destination Status’ agreement in China in 2017. They are the only agents who can process leisure ADS visa applications, and thus operate leisure tours. However, agents who do not have this status may be able to find ways for their applications to be processed.

The Chinese government is responsible for promoting the Chinese tourism industry as well as negotiating with overseas governments on ADS-related matters.

The main drivers of using an agent for international travel are: convenience; language barriers; visa preparation; knowledge gaps; value. Many Chinese visitors book group travel as a lot of them are first time international travellers and being part of a group can reassure them. However, the FIT segment keeps growing and the trade offer adapts with more semi-independent tours, and more niche themes.

Traditional agencies now have to face the competition of online travel agencies as the sector is growing: 49% of Internet users booked their travel online in December 2017, a 26% increase on December 2016.

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**Major tour operators**

- Caissa Tourism (HNA-Caissa)
- CYTS
- Beijing Baicheng International Travel Co. Utour Group
- China International Travel Service (CITS)
- China Comfort Travel Group
- Beijing Tourism Group
- Jinjiang Travel (Shanghai Jin Jiang Tours)
- Shanghai AirLines Tours International
- Shanghai Fasco
- Shanghai Spring
- Ctrip
- GZL (second largest in South China)
- Nanhu Travel (based in Guangzhou)
- Qunar (Baidu Travel)

**Key meetings, incentives, conferences and events agencies**

- China CYTS MICE Service Company
- CITS International MICE Company
- CTS MICE Service Company
- Grand China MICE Service
- UMICE International Travel

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*Source: CNNIC's 41st report (January 2018), UKVI Factsheet (July 2017), China MICE market study, VB 2018*
4.2 Travel trade: online travel companies

Other online platforms are quite popular when it comes to planning travel, some being traditional agents with an online presence (Caissa), some being search engines that have specialised functions (Baidu Travel), or even specialised forums (Qyer, Mafengwo).

International online travel platforms have China in their sights, partially by making links with local players, with Booking.com taking minority stakes in rivals Ctrip and Meituan.

Preferred online platforms for researching and booking trips in 2018

- **Online Travel Agent (OTA)**
  - Ctrip: 59%
  - Qunar: 34%
  - Tuniu: 28%
  - Fliggy: 20%
  - LVMama: 15%
  - Dianping: 12%
  - eLong: 12%
  - Mafengwo: 15%
  - Qyer: 8%
  - Airbnb: 14%
  - WeChat: 10%
  - Sina Weibo: 5%
  - Baidu: 8%

- **Travel forum**
  - Online travel forum: 52%

- **Sharing platform**
  - Recommendation by friends & family: 40%
  - Post on social media by friends & family: 39%
  - Official destination social media and/or website: 34%
  - Offline travel agency: 33%
  - Travel guidebook: 32%
  - Online search: 30%
  - Social media advertising: 29%
  - Online news site: 28%
  - Online video platforms: 22%
  - Travel reality shows on television: 17%

Source: Resonance Consultancy/ China Luxury Advisors 'The Future of Chinese International Travel' 2018, Skift
4.2 Travel trade: Chinese holidays

National public holidays

<table>
<thead>
<tr>
<th>Dates in 2019</th>
<th>Dates in 2020</th>
<th>National Holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 January</td>
<td>1 January</td>
<td>New Year Day &amp; Holiday</td>
</tr>
<tr>
<td>4-10 February*</td>
<td>24-31 January</td>
<td>Chinese New Year (Spring Festival)</td>
</tr>
<tr>
<td>5 April</td>
<td>4 April</td>
<td>Ching Ming Festival</td>
</tr>
<tr>
<td>1 May</td>
<td>1 May</td>
<td>Labour Day Holiday</td>
</tr>
<tr>
<td>7 June</td>
<td>25 June</td>
<td>Dragon Boat Festival</td>
</tr>
<tr>
<td>13 September*</td>
<td>1 October</td>
<td>Mid Autumn Festival (Moon Festival)</td>
</tr>
<tr>
<td>1-7 October</td>
<td>2-7 October</td>
<td>National Day Holiday (Golden Week)</td>
</tr>
</tbody>
</table>

Chinese workers have a statutory 5 to 15 days of paid annual leave (depending on years of service).
In addition to the standard national holidays, working women also receive a paid half-day off on Women’s Day (8 March).
It is common that the day before the start of the two main holidays, the spring and the mid-autumn festivals (National Day Holiday Golden Weeks), should be also made a holiday if it is a Monday.
Many families travel during school holidays to look at higher education options abroad. The best periods to do so are often in between the two semesters that divide the academic year (September-January and February/March-June/July), or before the start of the new year. Most universities also follow the same rhythm, although some are trying out the quarterly system.

Source: Office Holidays, JobMonkey
*The Chinese government swap weekends on either end of three day national holidays to stretch to a longer holiday period of normally 7 days
4.2 Travel trade: practical information

General practical information:
Business hours are usually 09:00–17:00 Monday to Friday.

Meetings:
To understand China could be a daunting task for any foreigner. Traditional values and local business practices are different and diverse. What works in one part of China might not work in other parts of it.
Try to understand the local perspective. Be adaptable and patient, and don’t be afraid to ask.
Always prepare to be introduced through a middleman and use guanxi (connection) as much as you can. Don’t forget to give face (show respect) to the host and your partners.

Hospitality etiquette
“Face” is an important part in Chinese culture. Avoid embarrassing Chinese clients, even for a joke.
Kissing and hugging are not a common form of greeting with the Chinese. Many of them would feel embarrassed, and so it is best to avoid it.
Avoid politics as a conversation subject as it can be very sensitive.

Business meeting etiquette:
There are a few simple steps to follow here:
• Be punctual and prepared.
• Bring a small token gift to leave a good impression.
At the start of the meeting, the exchange of business cards is important: try to have a good supply of cards, possibly with contact details printed in Chinese on one side. You should present it with two hands, the right way round allowing the recipient to read the information.
Titles are very important: address people directly by using their professional title or Mr, Mrs, or Miss, followed by the surname, starting with the most senior person in the room to begin and guide conversations.
Chinese communications rules imply “saying it without saying it”: you will have to learn to read between the lines.
To show humility when complimented, a Chinese person tends to deny it.
The Chinese are interested in different cultures and etiquettes and appreciate tips on understanding Western/British ways of doing things.
4.3 Caring for the consumer

Accommodation
Chinese travellers increasingly prefer authentic accommodation options that reflect best the destination where they are staying. Luxury travellers, in particular, would be more likely to like staying a castle or historic house than other inbound luxury travellers.
However, they would still require some modern comfort, and prefer when some information is available in their language.

Food and drink
With more and more affluent and younger consumers increasingly exposed to Western culture through their cosmopolitan lifestyle, especially in urban coastal regions, more Chinese might appreciate cheese, dairy products, dessert, wine or whisky. The latter, with its Scottish roots, is the product most associated with Britain among the Chinese. However, they would also be interested in trying British cheeses. Whilst in Britain, afternoon tea will also be a must as it is considered a genuine experience, and there is growing interest in artisan coffee, craft beer, gin and cocktails as Chinese new affluent middle class gear towards more cosmopolitan lifestyles.
However, many Chinese tourists will recourse to familiar Chinese food once in a while. Dinner can be served quite early. The general perception of Chinese food in the UK, especially in London, is very positive.

Source: Resonance Consultancy/ China Luxury Advisors 'The Future of Chinese International Travel' 2018, VB/Kantar Millward Brown 2017 research, VB/DEFRA “Food is GREAT” 2017
4.3 Caring for the consumer

Language

Chinese visitors value services with Chinese support and entertainment in their language. Mandarin is the most widely spoken language in China, and simplified Chinese the most widely read. 39% of Chinese people find sign/information in their language ‘very important’, and 44% ‘quite important’ in making them feel welcome.

Payment preferences

<table>
<thead>
<tr>
<th>Mobile payment preference Q1 2018</th>
<th>Offline purchases</th>
<th>Online purchases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alipay</td>
<td>36%</td>
<td>59%</td>
</tr>
<tr>
<td>WeChat Pay</td>
<td>60%</td>
<td>34%</td>
</tr>
<tr>
<td>Others</td>
<td>4%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Chinese authorities have recently capped the amount of cash money that can be withdrawn, or changed and carried on holidays. However, since digital payments started to boom in 2012-2013, they have become omnipresent for Chinese consumers across generations, and are narrowing the gap between urban and rural consumers. In Q1 2018 the mobile payment market surpassed US$16 trillion. This trend was driven by AliPay and WeChat pay, and the challenge for Chinese tourists is levels of acceptance of these payment platforms overseas.

Source: Anholt Nation Brands Index 2017, Business Insider UK, Resonance Consultancy/China Luxury Advisors 'The Future of Chinese International Travel' 2018, IIMedia Research/China Channel
Appendix: Useful links and further information
Appendix 1: Working with VisitBritain

We can help you extend your reach through:

Digital and social media such as Youku, WeChat or Weibo.
Press and PR by sending us your newsworthy stories or hosting our journalists, influencers and broadcast crew
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
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 GREAT China Welcome Programme or trade website or contact the B2B events team or campaign partnerships team or trade support team or VisitBritain shop team
Appendix 1: Working with VisitBritain

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 November 2015.

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.

To find out more information, browse:

VisitBritain’s mission
The Government’s Tourism Action Plan
VisitBritain’s events
‘I Travel For…’ campaign
The tourism sector deal bid
Appendix 1: Working with VisitBritain

VisitBritain’s global audience segments

In 2017, VisitBritain 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 this page

In China, VisitBritain focuses on two audience segments among the international travellers:

- **Buzzseekers in China**: affluent and seasoned travellers; opinion leaders of their friends and social contacts, who prefer premium experiences and adventures.

- **Culture Buffs in China**: regular travellers who look for experiences that will help them grow as a person and create lifelong memories.

Source: Kubi Kalloo, 2017

<table>
<thead>
<tr>
<th>Segments (&amp; global attributes)</th>
<th>Global market share</th>
<th>Market share in China</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Buzzseekers</strong> (free spirited and spontaneous, they like holidays full of action and excitement)</td>
<td>38%</td>
<td>39%</td>
</tr>
<tr>
<td><strong>Explorers</strong> (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)</td>
<td>23%</td>
<td>17%</td>
</tr>
<tr>
<td><strong>Adventurers</strong> (they live to go off the beaten track, spending time outdoors and trying out new experiences)</td>
<td>16%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Sightseers</strong> (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Culture Buffs</strong> (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)</td>
<td>12%</td>
<td>30%</td>
</tr>
</tbody>
</table>
Appendix 2: Useful research resources

We have dedicated market-specific research and insights available which include:

• Planning, decision-making and booking cycle of international leisure visitors to Britain
• Technology and social media
• 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 China or other inbound markets browse our markets & segments pages.
Or our inbound research & insights.
Or contact us directly.
Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

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, consult the release calendar.

**Oxford Economics** last updated the ‘Global Travel Service’ databank in July 2019.

**Apex** was last updated with October 2019 data.

**UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, January 2019.

**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 2018 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples.
Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** 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 USD1 million.

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 2017. 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.