



VisitBritain™

Foresight – issue 140

Types of shops visited by overseas visitors

August 2015

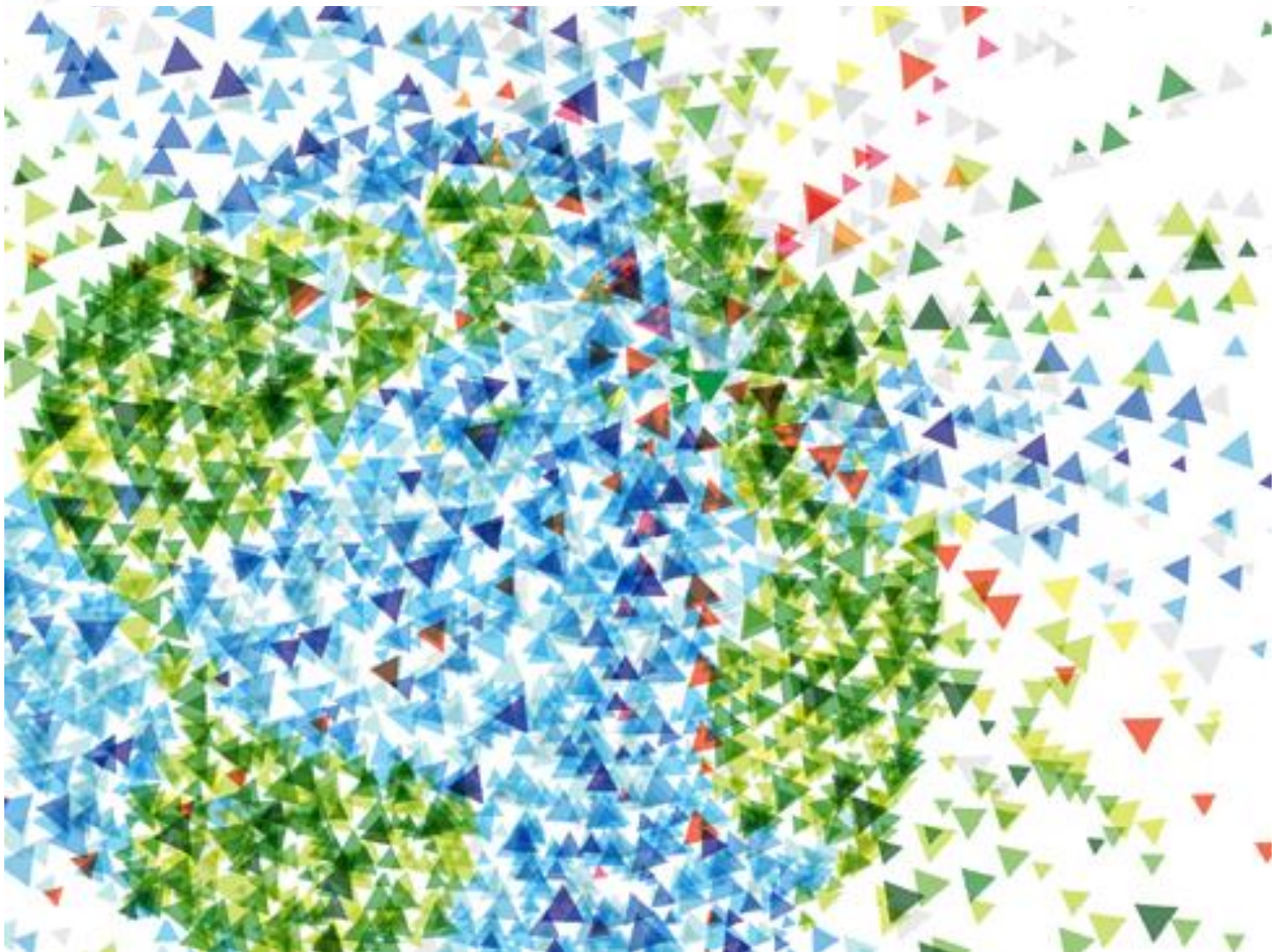
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Shopping by overseas visitors

Key facts

- Shopping is one of the most popular activities for overseas visitors to Britain, with at least 64% of visits in 2014 involving shopping – an estimated 22 million.
- The most recent data available indicates that 25% of all expenditure by overseas visitors is on shopping. On this basis we can estimate that in 2014, £5.5 billion of the total £21.8 billion spent by overseas visitors in the UK would have been spent on shopping.
- Whilst most visitors come to Britain for a holiday, to visit friends or relatives, for business or study last year over 0.3 million visits were mainly for personal shopping. These visits see an average spend per night of £346, some four times more than the average spend per night across all visits.
- Half of visits include shopping on the High Street / at a shopping centre. These were commonly included by personal shopping, study, holiday and VFR visitors. Women are markedly more likely than men to visit these types of shop (61% compared to 42%).
- Department stores, outlet villages and luxury / designer shops are the second most popular shopping venue (visited by 26%). Personal shopping and holiday visitors are most likely to visit these types of shop. Visitors from the Gulf have a very high propensity to visit this type of shop.
- Gift or souvenir shops were visited by 19%, and are particularly popular with holiday and study visitors seeking a trip memento. Gift and souvenir shopping is more common amongst young people. Visitors from markets dominated by holiday visitors, including Chile, Mexico and Brazil, are most likely to shop for gifts or souvenirs.
- Boutiques or markets selling craft or speciality items were a stop for 15%, rising to 26% amongst those visiting primarily to shop and 21% amongst holiday visitors.
- Visitors who went to any of the types of shops explored in this research spent an average of £739 during their trip compared to £414 by those who did not – around 80% more. This rises to £960 per visit for those who included shopping at an outlet, department store or shop selling luxury / designer goods.
- Women are far more likely than men to include shopping of all sorts in their trip, around three quarters do so compared to only just over half of men (77% compared with 54%).

Introduction

The UK's shopping is a key draw for overseas visitors, especially women (shopping on London's Oxford Street is the second most

appealing activity to potential female visitors, see Foresight 122), and women are more often destination decision-makers.

International visitors are important to the business of many retailers across the country, ranging from gift shops in the Highlands to Selfridges. Evidence from retailers and tax reclaim data shows that those from high-spending markets such as the United Arab Emirates and China spend considerable amounts on luxury items in the UK, and this contributed to an overall spend of £21.85 billion by overseas visitors to the UK in 2014 – a record in nominal terms.

Study Details

To understand which types of shops are particularly popular with our overseas visitors VisitBritain sponsored a question on the International Passenger Survey (IPS) during 2014. Departing visitors were asked if they had visited four different types of shops during their visit to the UK, with examples of each category provided as below:

- *Shopping centres/malls, chain shops or 'High Street' shops (e.g. Primark, M&S, Boots, Next).*
- *Outlet villages, department stores or shops selling designer/luxury goods (e.g. Harrods, John Lewis, Selfridges, Burberry, Chanel)*
- *Boutiques or market stalls selling speciality/craft goods (e.g. Greenwich market, antiques shop)*
- *Gift or souvenir shops (e.g. museum gift shop, tourist shops in Covent Garden)*

There are of course other types of shops, and indicating that 'none' of these had been visited does not mean the visit did not include any shopping. Also, the question did not ask about purchases, so each category will include visitors who were just browsing or accompanying others as well as those who did purchase items.

Translations of the question were used for main markets, and the wording was extensively tested and adapted appropriately (for example 'High Street shopping' is an English term not well understood or hard to translate in many countries).

A small proportion (8%) did not know, or did not answer the question for another reason. These records have been excluded from the analysis below.

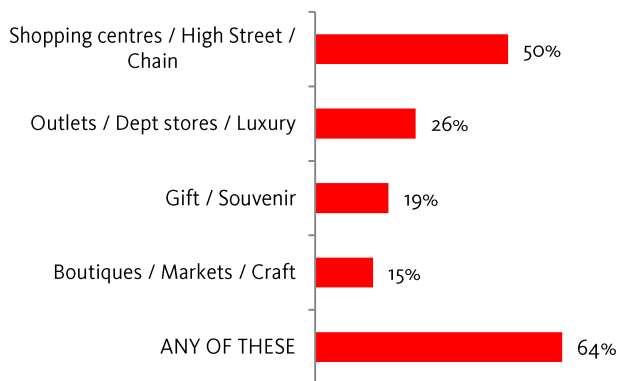
The IPS is run by the Office for National Statistics (ONS). It is conducted continuously throughout the year and has a very robust overall sample size. In 2014 over 44,000 visitors were interviewed across the UK's major airports and ports as well as those using the Channel Tunnel / Eurostar.

This report complements two previous Foresights focussed on shopping, one about the types of purchases visitors make and the other providing an overview of the importance of shopping as a motivator for tourism, and the segments for which it is most important. Find these, and more on our [Shopping Statistics and Insights page](#)

Overview

Overall, almost two thirds (64%) of visits from overseas in 2014 involved shopping at least one of the types of shops listed. Half (50%) of all visits included shopping at High Street shops or a shopping centre. Second most popular were outlets, department stores or designer / luxury shops – these were visited by a quarter (26%). Around one in five (19%) visits included going to gift or souvenir shops, and just over one in seven (15%) went to a boutique style shop or market selling craft or speciality goods.

Chart 1: Visits which included each type of shop



Spending on shopping

Overall those who confirmed they had been to at least one of the types of shops listed spent almost 80% more than those who did not (£739 compared to £414). Whilst there is not a breakdown available of how much those who visited each type of shop may have spent on purchases here we have compared the total amount spent during the visit between those who did, and did not visit these shops.

The total spent during the visit also increased with the number of shop categories visited, as might be expected. Those who had visited all the types of shops listed had an average spend of £1,186 during their visit, almost twice that of those who had visited shops

in just one of the categories (£596).

Comparing those who went to the specific types of shops listed we can see that those who visited outlets, department stores or shops selling designer or luxury goods had a particularly high average spend of £960 during their UK visit (as shown in Table 1). This is almost 30% more than the average spend of those who visited shopping centres or High Street shops (£741) – though it should be borne in mind that 21% visited both types of shop and so are included in both figures (if they were excluded the difference would be even greater).

Table 1: Spend per visit by shop type visited

	Average spend per visit
Outlets / Dept. stores / Luxury	£960
Boutiques / Markets / Craft	£897
Gift / Souvenir	£818
Shopping centres / High Street / Chain	£741
NONE	£414
ALL VISITS	£636

Purpose of visit

Spending

The amount visitors spend varies a great deal by journey purpose, with those visiting friends and relatives (who save on accommodation and food) spending only around £46 per night compared to other holiday visitors who spend just over £100 per night, as shown in Table 2. Visitors who come primarily to shop have the highest average spend per night at £346, indicating how valuable they are for the UK tourism industry as of course they will spend money on accommodation and food as well as shopping. Personal shopping visits involve spending around four times more per night than the average across all visits (£83).

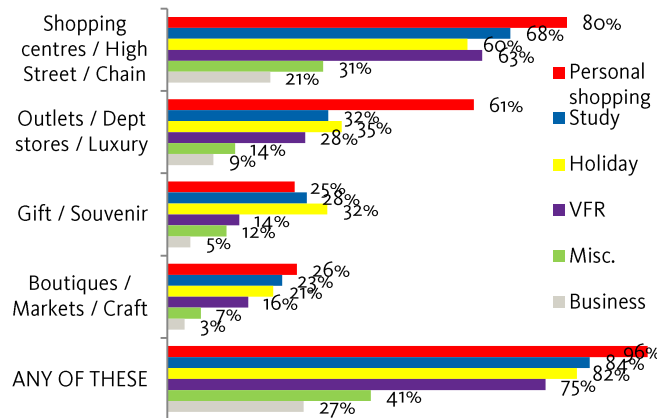
Table 2: Spend per night by main journey purpose

	Average spend per night
Personal shopping	£346
Business	£147
Holiday	£105
Study	£63
VFR	£46
ALL VISITS	£83

Propensity to visit different types of shop

Unsurprisingly those who visited primarily to shop were those most likely to have visited three of the four types of shop although they were less likely than holiday and study visitors to have been to gift / souvenir shops, as shown in Chart 2.

Chart 2: Visits which included each type of shop, by main journey purpose



Study visits were next most likely to have included most types of shopping, with overall 84% including at least one. Study visits are generally much longer than other visits, providing ample opportunity for shopping and indeed many of those studying will have needed to buy day-to-day items to use during their stay (evidenced by 68% using High Street shops, chain shops or shopping centres).

Amongst holiday visitors 82% had visited at least one type of shop listed. Holiday visitors were more likely than other visitors to have been to gift / souvenir shops (almost a third had done so), and over a third (35%) had been to an outlet / department store / shop selling luxury or designer goods.

The proportion of VFR visitors who went shopping was a little lower than amongst holiday visitors, and these visitors typically spend less during their trip.

Business visitors on average spend more than holiday or VFR visitors but are much less likely to be spending money on shopping. Only just over a quarter (27%) had been to any of the shop types mentioned.

Duration of visit

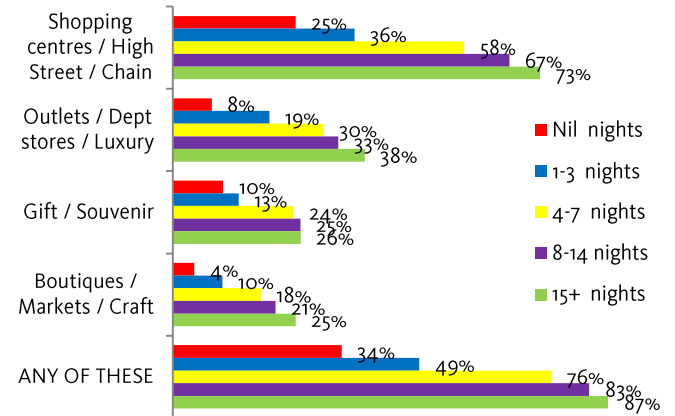
There is a clear trend for those who stay longer to be more likely to visit each type of shop, as shown in Chart 3. Those who stayed over a fortnight were two and a half times as likely as those who were on a day trip to have been to least one of the categories of shop listed (87% compared to 34%).

Visits which included at least one type of shopping mentioned lasted an average of nine nights – more than twice as long as the average of four nights spent in the UK by those who did not shop at any of the listed shops.

Whilst it clearly makes sense that those with more time in the UK

are able to shop more the small minority of visits which are primarily for shopping are typically very short, two nights, compared to the overall average of eight nights (six nights for holidays). So, whilst visits purely for personal shopping are valuable in terms of the high spend per night, so are those longer visits which are for another purpose (and include spending on other items) but also include shopping.

Chart 3: Visits which included each type of shop, by duration of visit

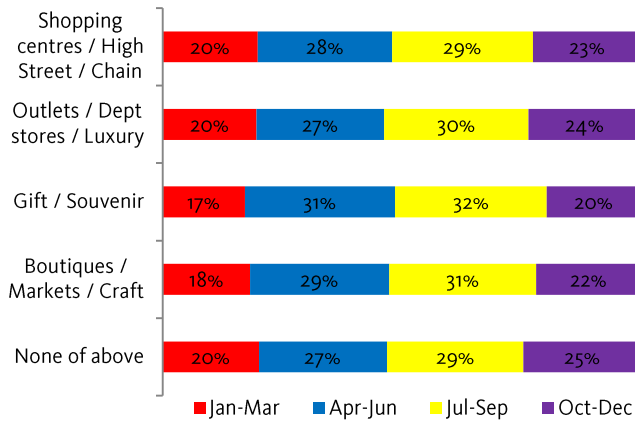


Seasonality

There is perhaps less variation by season to the proportions going shopping than might be expected. As shown in Chart 4, the proportion of visits in each quarter involving each particular type of shopping follows the overall seasonality seen in visits to the UK, with January to March the quietest time of year. This is simply reflecting that shopping is a part of the trip for most visitors, few are coming specifically for a shopping event.

Looking only at those who visit primarily for shopping the split is somewhat different though with specific shopping visits a good source of income in the low tourist season - 38% of these trips happen in the last quarter of the year (perhaps Christmas shopping) compared to 23% of all visits, with a further third catching the sales in Q1, compared to only 20% of all visits. Only 29% of personal shopping trips are in the spring / summer peak season compared to 57% of all visits.

Chart 4: Share of visits to each type of shop by quarter



Age and gender

Britain’s youngest visitors are the most likely to go shopping, with 85% of those aged under 16 and 77% of those aged 16-24 shopping whilst in the UK, as shown in Table 3. Younger visitors aged under 25 were markedly more likely to visit shopping centres / High Street / chain shops and gift / souvenir shops (the latter are especially popular with children, visited by 36%). However, outlets / department stores / shops selling luxury or designer goods were almost equally likely to have been part of the visit for all ages (ranging from 28% of 16-24 years olds to 24% of 35-44 year olds).

Overall the oldest visitors to the UK (those aged 55 or over) were more likely than their middle-aged counterparts to have been to at least one of these types of shops (68% of those aged 65 or over, 65% of those aged 55-64 compared to 57% of those aged 35-44 and 59% of those aged 45-54). There is though little difference between these age groups in propensity to visit the specific types of shops listed.

Female visitors were more likely to have been shopping, with over three quarters (77%) going to at least one type of shop compared to only just over half (54%) of male visitors. The greatest difference was in likelihood to go to shopping centres/ High Street shops /chain stores, just over three in five women did so compared to only just over two in five men (61% compared to 42%).

The greatest divergence in shopping habits by gender is amongst middle aged visitors, with women aged 35-55 around 1.5 times as likely as men in the same age group to have been to least one type of shop. Women aged 45-54 are especially more likely to have been to shopping centres/ High Street shops /chain stores than men in the same age group (60% compared to 37%).

Table 3: Visits which included each type of shop, by age and gender

	Shopping centres / High Street / Chain	Outlets / Dept. stores / Luxury	Gift / Souvenir	Boutiques / Markets / Craft	ANY OF THESE
Age					
0-15	67%	25%	36%	18%	85%
Female	70%	26%	37%	19%	88%
Male	64%	25%	36%	18%	81%
16-24	61%	28%	24%	19%	77%
Female	67%	32%	26%	23%	84%
Male	52%	23%	22%	14%	68%
25-34	51%	25%	18%	15%	64%
Female	59%	32%	21%	19%	75%
Male	43%	20%	14%	11%	55%
35-44	43%	24%	16%	13%	57%
Female	57%	32%	22%	17%	73%
Male	34%	20%	13%	10%	46%
45-54	46%	26%	18%	14%	59%
Female	60%	35%	24%	21%	76%
Male	37%	21%	14%	10%	49%
55-64	49%	25%	18%	14%	65%
Female	58%	29%	22%	17%	76%
Male	42%	22%	16%	12%	55%
65+	51%	25%	17%	14%	68%
Female	55%	29%	19%	17%	75%
Male	47%	22%	16%	12%	62%
ALL					
Female	61%	31%	24%	19%	77%
Male	42%	21%	16%	11%	54%

Markets

Volume of shoppers

As would be expected the majority of visits which include shopping are accounted for by the markets which provide the highest volume of visits. France, Britain’s most voluminous market overall is also that which generates the highest number of visits to each type of shop checked, as shown in Tables 4 and 5. The USA is Britain’s third largest market, but overtook Germany in terms of volume of visits including each type of shop except shopping centres / High Street / chain shops.

Table 4 Top ten markets for volume of visits to each type of shop I

	Shopping centres / High Street / Chain		Outlets / Dept. stores / Luxury	
		Visits (ooo)		Visits (ooo)
1	France	2,175	France	953
2	Germany	1,485	USA	780
3	USA	1,284	Germany	642
4	Spain	1,109	Italy	567
5	Irish Republic	937	Spain	550
6	Italy	884	Australia	394
7	Netherlands	837	Netherlands	392
8	Australia	655	Irish Republic	334
9	Belgium	556	Sweden	308
10	Poland	541	Norway	287

Although the Republic of Ireland is Britain's fourth largest market for visits, these visitors are less likely than those from slightly smaller markets Spain, Italy and the Netherlands to include shopping at outlets / department stores / shops selling luxury or designer goods, gift / souvenir shops or boutiques / markets selling speciality / craft goods.

Italy is Britain's seventh largest market but generates the fourth highest number of visits including outlets / department stores / shops selling luxury or designer goods.

Table 5 Top ten markets for volume of visits to each type of shop II

	Gift / Souvenir		Boutiques / Markets / Craft	
		Visits (ooo)		Visits (ooo)
1	France	853	France	628
2	USA	705	USA	506
3	Germany	654	Germany	466
4	Spain	396	Spain	332
5	Italy	392	Italy	294
6	Netherlands	316	Netherlands	244
7	Australia	288	Australia	242
8	Irish Republic	216	Irish Republic	225
9	Belgium	201	Belgium	165
10	Sweden	188	Sweden	148

Visitors from Australia made up Britain's tenth largest market in 2014, but were more likely to shop at outlets / department stores /

shops selling luxury or designer goods during their trip than those from other top ten markets Republic of Ireland, Netherlands, Poland and Belgium.

Norway and Sweden were just outside Britain's top ten markets in 2014 (eleventh and twelfth respectively), but account for a high volume of visits including outlets / department stores / shops selling luxury or designer goods. Visits from Sweden also makes the top ten in terms of visits including gift / souvenir shops and boutiques / markets / craft shopping.

France accounts for around 30% of visits primarily for personal shopping (98,000 in 2014) followed by Norway which accounts for 12% (40,000). Other markets which account for between 2% and 9% of personal shopping visits are Belgium, Germany, Sweden, the Netherlands, the Republic of Ireland, Denmark, Poland, Italy and Switzerland.

Propensity to shop

Around three quarters of visits from Malta, Nigeria, Estonia, Oman and Egypt include shopping at a shopping centre / High Street / chain shop, as shown in Table 6. There are a range of reasons why visitors from some markets are more likely to have been to these types of shops, for example a third of visits from South Cyprus (ranked seventh) are from British people resident there who may include a visit to a favourite shop or stocking up on particular goods whilst in Britain. Visits from Oman, Nigeria and Egypt are longer than average (18, 15 and 14 nights respectively), giving plenty of opportunity to shop, and also perhaps creating a need for purchases such as cosmetics whilst in the UK.

Table 6 Top ten markets for propensity to visit each type of shop I

	Shopping centres / High Street / Chain		Outlets / Dept. stores / Luxury	
1	Malta	76%	Bahrain	71%
2	Nigeria	75%	Kuwait	67%
3	Estonia	74%	Qatar	61%
4	Oman	74%	Saudi Arabia	61%
5	Egypt	74%	Egypt	57%
6	Kenya	72%	Oman	49%
7	South Cyprus	72%	Indonesia	48%
8	Pakistan	71%	Nigeria	44%
9	New Zealand	69%	Brazil	44%
10	Ukraine	68%	UAE	44%

Visitors from the Gulf are particularly likely to have shopped at an outlet / department store or shop selling luxury or designer goods, with Bahrain, Kuwait, Qatar, Saudi Arabia, Oman and UAE all in the top ten list. Visitors from these markets are amongst the highest spenders whilst in the UK, on average typically spending

£2,372 each. The other markets included in the top ten for likelihood to visit this type of shop also all have high average spend per visit.

Visitors from other high spending Asian markets including Hong Kong (44%), Thailand (42%), Malaysia (42%), Singapore (40%) and China (37%) also were likely to include outlet / department store or shop selling luxury or designer goods in their itineraries as were those from New Zealand and Australia 41% and 37% respectively).

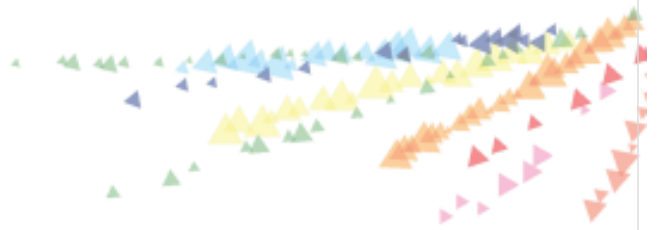


Table 7 Top ten markets for propensity to visit each type of shop II

	Gift / Souvenir		Boutiques / Markets / Craft	
1	Mexico	37%	Indonesia	28%
2	Chile	35%	Chile	27%
3	Brazil	31%	New Zealand	25%
4	Ukraine	28%	Egypt	24%
5	South Korea	28%	Saudi Arabia	23%
6	Saudi Arabia	27%	Iceland	23%
7	Australia	27%	Argentina	23%
8	Malaysia	27%	Australia	23%
9	Argentina	27%	Finland	23%
10	Indonesia	26%	Kuwait	22%

Markets in the top ten most likely to go shopping for gifts or souvenirs are generally those most likely to have mainly holiday visitors – around 70% or more of visitors from Mexico, Chile, Brazil, South Korea and Argentina are in Britain for a holiday, and just under half of those visiting from Saudi Arabia, Australia and China was just outside the top ten with 26% including gift / souvenir shopping.

Marketing the UK's shopping

VisitBritain's marketing often features shopping and our [consumer website](#) highlights Britain's markets, department stores and more.

Data Sources

Table 8: Data sources

Source	Charts/Tables
Office for National Statistics International Passenger Survey	All Tables and Charts





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