

# Booking a holiday

Foresight – issue 151

VisitBritain Research

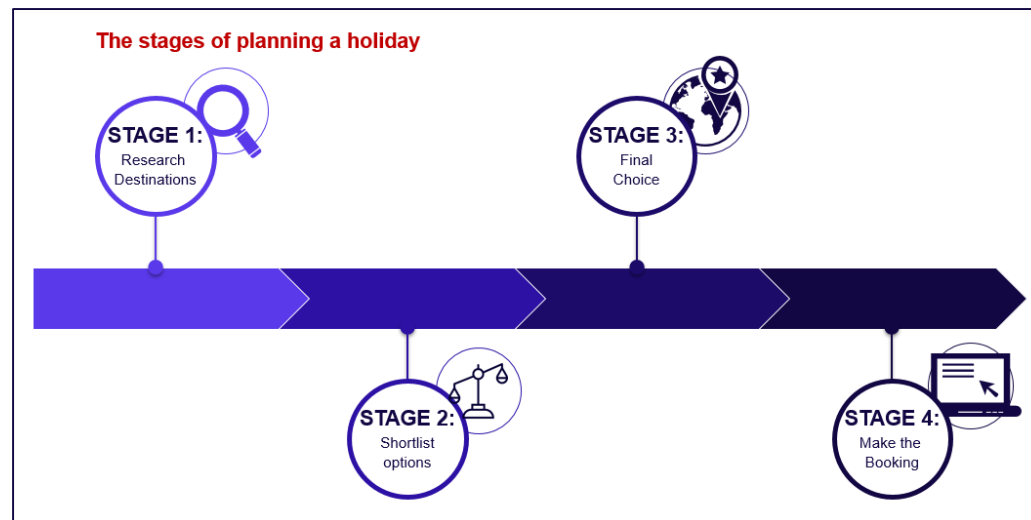


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# Introduction

- This edition of Foresight explores in depth the different behaviours surrounding the stages of booking a holiday.
- This analysis comes from a research study carried out by VisitBritain and research agency Ipsos in spring 2016. International travellers from 20 different markets were interviewed, and are either previous visitors to Britain, or would consider visiting in the future.
- International travellers who were residents of the following markets were surveyed: Australia, Brazil, Canada, China, Denmark, France, Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, Saudi Arabia, South Korea, Spain, Sweden, UAE & USA.
- The study explored the four key stages when planning a holiday: **Researching**, **Shortlisting**, **Final Choice** and **Booking**. In this report we will be focussing primarily on the final stage of the planning process. Planning and Researching behaviour is covered in more depth within another Foresight report (issue 150).



## 2. Summary (1/2)

- **The way that holidays are booked to Britain is fairly evenly split – half booked their travel and accommodation separately, and the other half booked their trip as a package:**
  - Long-haul visitors to Britain were more likely to book their trip as a package (58%), with the exception of Australia and New Zealand. The markets most likely to book a package rather than separate elements are UAE (76%), China (71%) and USA (70%).
  - Short-haul visitors were more likely to book their travel and accommodation separately (58%). European markets least likely to book a package deal are Denmark (28%), Norway (36%), Sweden (36%) and France (37%).
- **Almost two thirds of travel booking (64%) took place direct with a travel provider and 36% with a third party agency or comparison site:**
  - Visitors from South Korea (83%), China (72%) and Gulf markets (64%) were more likely to book their travel via an agency or comparison site, whilst European markets were among the most likely to book directly.
  - The majority of travel booking (85%) is done online, although 29% in the Gulf and 27% in Brazil booked face to face. In Canada, 11% of travel bookings to the UK were made by phone.
  - 85% of online travel bookings were made using a laptop or desktop, 7% using a tablet and 7% using a smartphone. China (33%), Gulf (31%), India (23%) and South Korea (21%) and are more likely to use a smartphone to book travel.
- **Whilst just over half (53%) of accommodation bookings were made direct with the provider, 47% were made via an agent or comparison site:**
  - Travellers from South Korea (76%) and China (76%) are most likely to book their accommodation via a third party than direct.
  - 70% of accommodation bookings were made online, although 17% did not need to book this element as they were able to stay with friends or relatives. This is most likely for travellers from New Zealand (48%) and Australia (29%).
  - A high proportion (82%) of online accommodation bookings were made using a computer, and 8% using a tablet and 8% smartphone. Smartphone bookings are most common in China (43%), Gulf (31%) and South Korea (23%).

## 2. Summary (2/2)

- **Around three fifths of holiday bookings (when travel and accommodation are booked together) are made via a travel agent, tour operator or comparison site. 21% of holidays are booked via a transport operator and 17% with an accommodation provider:**
  - Visitors from the USA (25%), Gulf (25%), Canada (22%) and France (22%) were more likely to book their holiday with an accommodation provider.
  - Two thirds of holidays (64%) were booked online, and over a quarter (27%) were booked face to face.
  - Face to face booking is more popular for visitors from Russia (56%), New Zealand (42%) and Australia (37%). 20% of Gulf visitors booked their holiday package on the phone.
  - Three quarters (74%) of online holiday bookings are made using a computer, 15% using a smartphone and 10% using a tablet. This is a higher usage of mobile devices than travel or accommodation bookings.
  - Smartphone apps were used for online holiday bookings by 24% from China, 16% from India, 15% from Gulf and 14% from South Korea.
- **Many are using online travel agencies to book their holiday or trip elements, with the main motivation being to compare prices (71%), as well as finding something within budget (67%).**
  - There is low brand loyalty, as only a third would book with one specific agency each time.
  - Price comparison is important for many, and a similar proportion are using third party sites, travel forums, direct with travel companies and search engines. A quarter discussed prices with friends before booking, 17% used social media and just 12% of people did no price comparison at all.
- **The products that are most often purchased before travelling to Britain are airport transfers (36%) and tickets for tourist attractions (31%) and theatre/musical/concerts (30%).**
  - London transport tickets are most often purchased during the visit (52%).

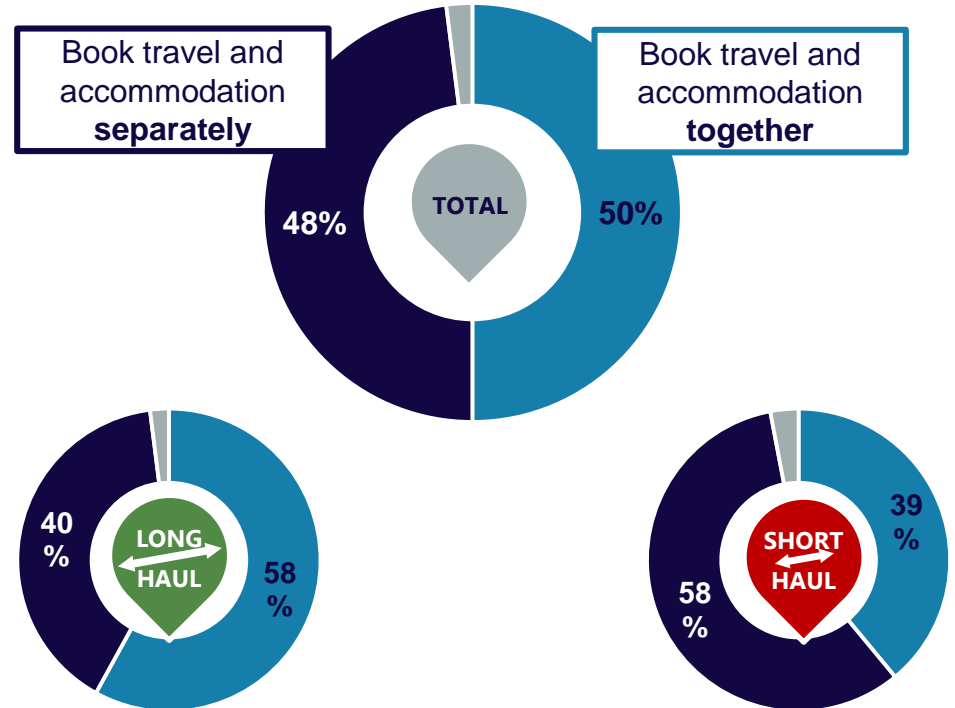


3. How are travel and accommodation booked?

# How did people book their travel and accommodation to Britain?

Amongst previous visitors to Britain, half booked their travel and accommodation separately, and half booked them together as part of a package deal.

However, this does differ between short and long haul markets. Those in close proximity to the UK are more likely to book travel and accommodation separately, whilst over half of long haul travellers to the UK prefer to book the elements together.



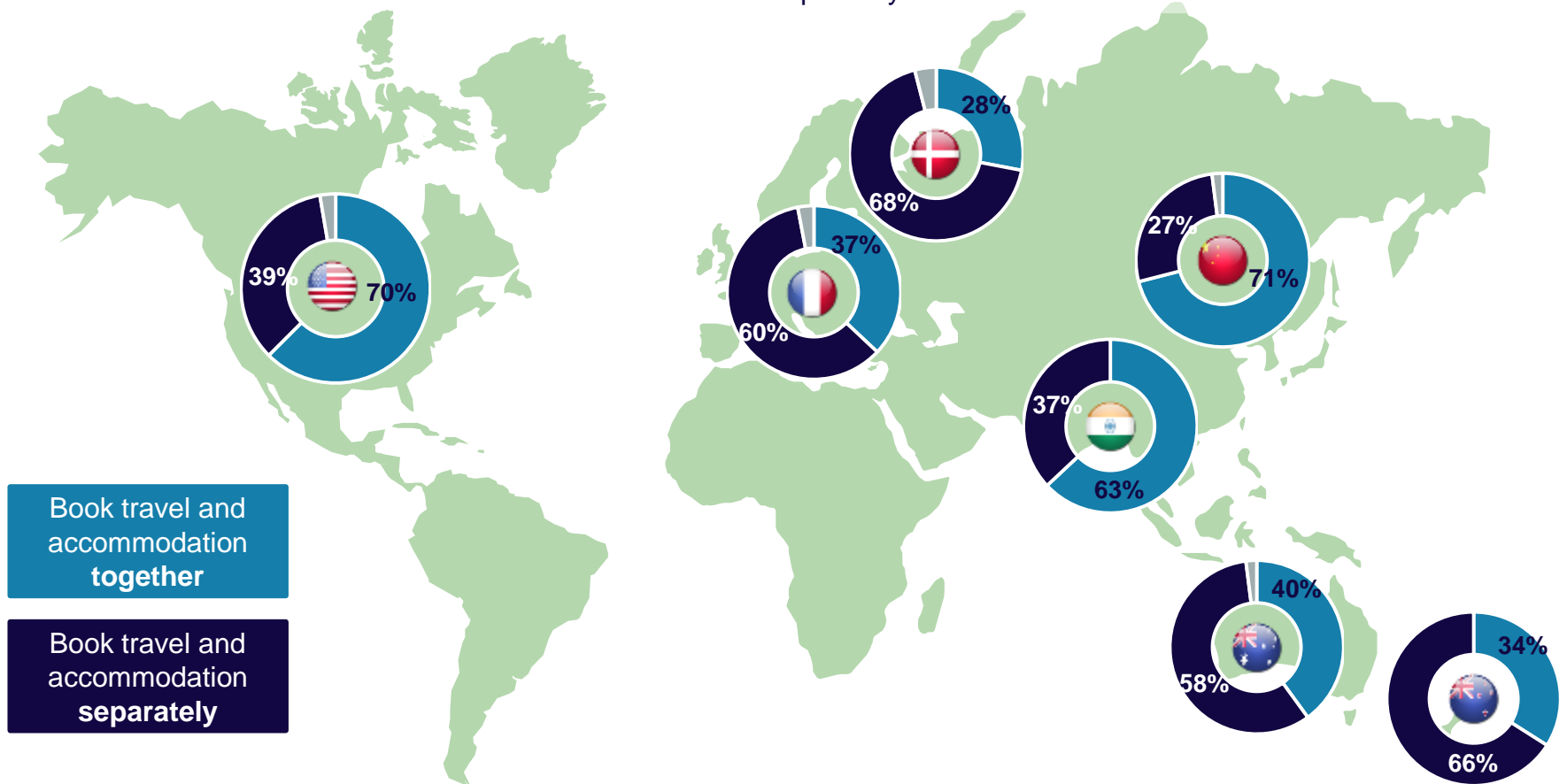
QB1: Which of the following best describes how you booked your holiday to Britain? If someone else made the booking, how did they book the holiday?

Base: Visitors (4,754), Long haul (2,750), Short haul (2,004)

# Travel and accommodation booking

## Key market differences

Most individual markets follow the same trend as long haul/short haul with the exception of Australia and New Zealand, who are more likely to book travel and accommodation separately.



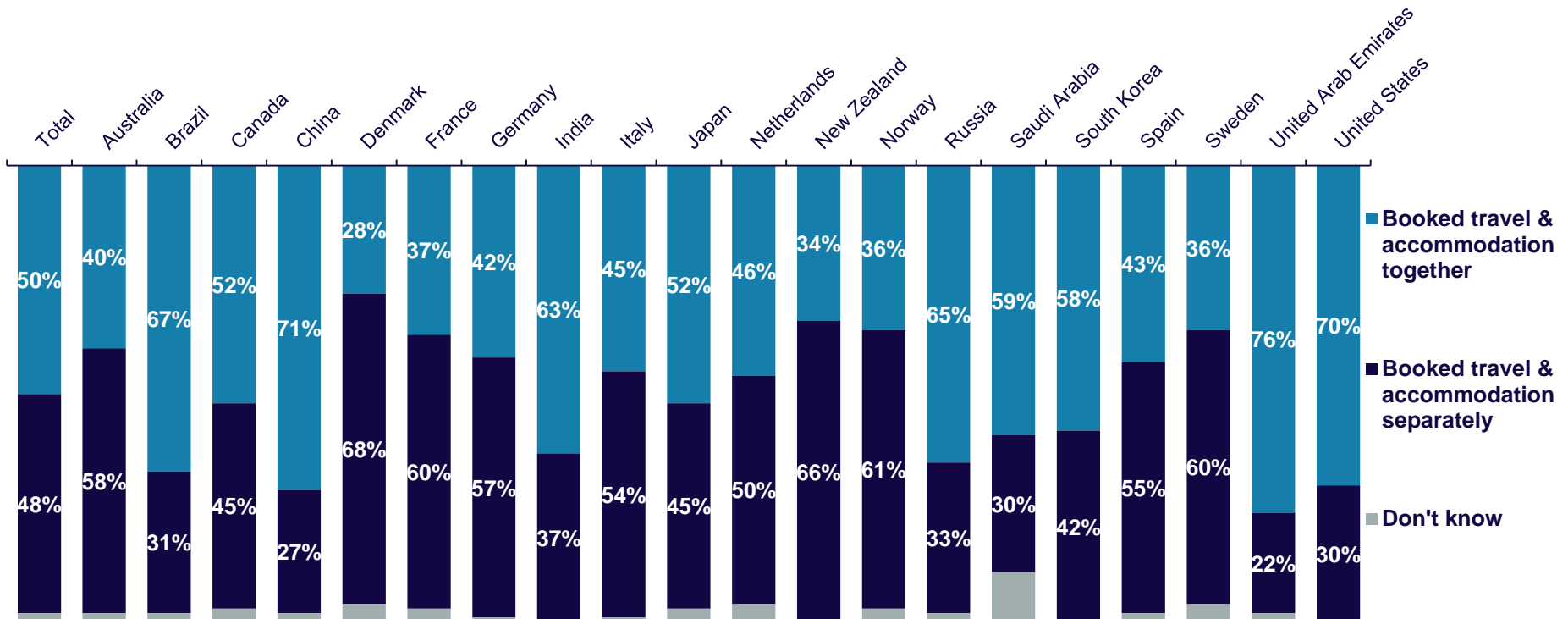
**QB1:** Thinking about the last holiday you took to a foreign country: which of the following best describes how you booked your holiday? If someone else made the booking, how did they book the holiday?  
**Base:** Total Visitors (4,754), Australia (300), Brazil (250), Canada (250), China (200), India (300), Japan (200), New Zealand (250), Russia (200), Saudi Arabia (175), South Korea (200), United Arab Emirates (125), United States (300), Denmark (200), France (300), Germany (254), Italy (300), Netherlands (200), Norway (250), Spain (300), Sweden (200)



# Travel and accommodation booking

## Full market breakdown

More than 70% in the UAE, China and the US booked their holiday to Britain as part of a package. European markets are more likely to book travel and accommodation separately, given affordability and flexibility of low cost travel options – Denmark and Sweden lead the way with the lowest proportion of package holidays to Britain.



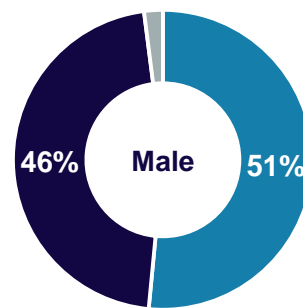
QB1: Thinking your holiday to Britain: which of the following best describes how you booked your holiday? If someone else made the booking, how did they book the holiday?

Base: Total Visitors (4,754), Australia (300), Brazil (250), Canada (250), China (200), India (300), Japan (200), New Zealand (250), Russia (200), Saudi Arabia (175), South Korea (200), United Arab Emirates (125), United States (300), Denmark (200), France (300), Germany (254), Italy (300), Netherlands (200), Norway (250), Spain (300), Sweden (200)

# Travel and accommodation booking

## Age & Gender

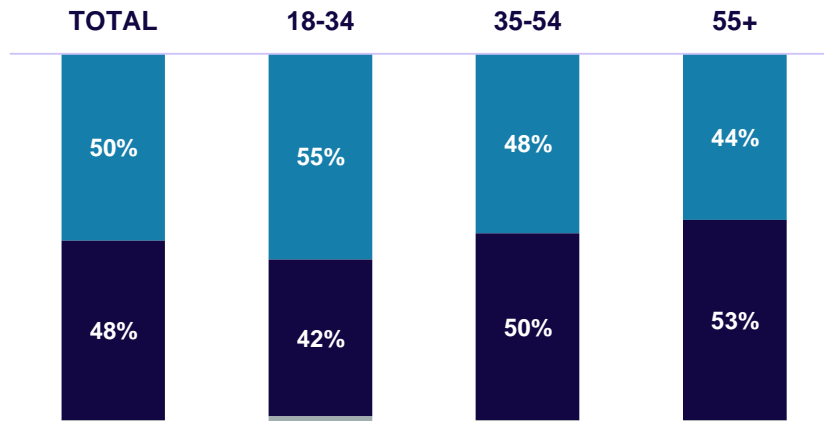
The split between those who book their trip as a package and those who book elements separately is fairly evenly split. However, men are slightly more likely than women to book their trip as a package, rather than the elements separately.



Book travel and accommodation together

Book travel and accommodation separately

Those aged 18-34 are more likely to book their travel and accommodation as a package. Those aged 35-54 are evenly balanced when it comes to booking separately or a package, and those aged 55+ are more likely to have booked their accommodation and travel to Britain as separate elements.



Book travel and accommodation together

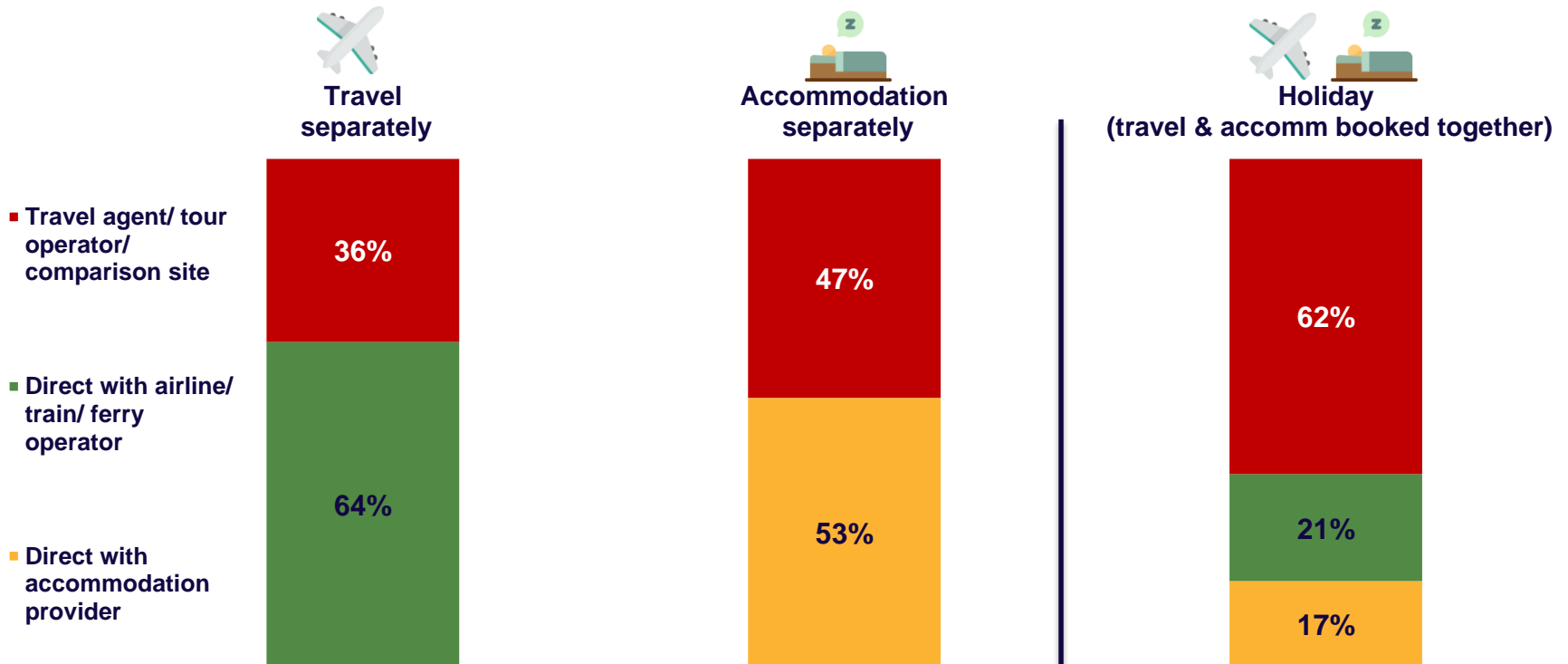
Book travel and accommodation separately

QB1: Which of the following best describes how you booked your holiday to Britain? If someone else made the booking, how did they book the holiday?

Base: Visitors (4,754), Male (2,408), Female (2,346), 18-34 (1,943), 35 – 54 (1,717), 55+ (1,094)

# Channel used to book trip elements

Over 60% of holidays to Britain are booked using a travel agent, tour operator or comparison site, and the rest are split fairly evenly between transport and accommodation suppliers. Just over half of accommodation bookings are made direct with providers, with the rest made via travel agents. A higher proportion of travel bookings (64%) are made direct with the provider, with a third booked via a travel agent.



QB4: How did you book the following?

Base: Visitors, Total booked holiday package (2,382), Booked travel separately (2,266), Booked accommodation separately and didn't stay with friends (1,744). NB. 'Don't know' excluded for analysis.

# Channel used to book trip elements

## Full market breakdown

**China, India, Gulf** and **South Korea** are more likely to book their travel via a travel agent / tour operator / comparison site. For other markets, accommodation or travel-only bookings are more likely to be booked direct with a specialised provider.

**Holidays** (when travel and accommodation are booked together) are most likely to be booked using a travel agent / operator / comparison site, although **Saudi Arabia, UAE** and **USA** are more likely to use either an accommodation or transport provider than other markets to book their whole trip.



### Travel

	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	KOR	SPA	SWE	USA	GULF
Through a travel agent / tour operator / travel comparison website	42%	33%	45%	72%	20%	18%	20%	58%	24%	50%	13%	50%	24%	29%	83%	31%	33%	32%	64%
Directly with the airline / train / ferry operator	58%	67%	55%	28%	80%	82%	80%	42%	76%	50%	87%	50%	76%	71%	17%	69%	67%	68%	36%

### Accommodation

	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	KOR	SPA	SWE	USA	GULF
Through a travel agent / tour operator / travel comparison website	37%	42%	39%	76%	37%	32%	37%	59%	47%	61%	41%	33%	50%	43%	76%	50%	50%	27%	63%
Directly with the accommodation provider	63%	58%	61%	24%	63%	68%	63%	41%	53%	39%	59%	67%	50%	57%	24%	50%	50%	73%	37%

### Holiday (Travel & Accommodation)

	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	KOR	SPA	SWE	USA	GULF
Through a travel agent / tour operator / travel comparison website	60%	64%	55%	77%	67%	50%	71%	59%	56%	82%	51%	65%	57%	74%	64%	69%	66%	48%	47%
Directly with the airline / train / ferry operator	20%	19%	23%	12%	24%	28%	9%	23%	25%	10%	35%	19%	30%	9%	22%	17%	30%	27%	28%
Directly with the accommodation provider	20%	17%	22%	11%	10%	22%	20%	18%	19%	8%	14%	16%	13%	17%	14%	14%	4%	25%	25%

QB4: How did you book the following?

Base: Total Visitors (4,754), Australia (300), Brazil (250), Canada (250), China (200), India (300), Japan (200), New Zealand (250), Russia (200), Saudi Arabia (175), South Korea (200), United Arab Emirates (125), United States (300), Denmark (200), France (300), Germany (254), Italy (300), Netherlands (200), Norway (250), Spain (300), Sweden (200)

# Booking channel

## Age & Gender

Over half of those who booked their travel separately booked directly with the operator. This is consistent for both men and women, although slightly more women booked directly compared to men. Those aged over 55 years old are more likely than younger age groups to book directly with the travel operator. The pattern is similar for accommodation booking in terms of age.

When it comes to holidays, i.e. travel and accommodation booked as a package, the majority are booked with an agent, operator or comparison site, with those aged over 55 most likely (72%) to book this way.

Booking channel	TOTAL	Male	Female	18-34 years	35-54 years	55+ years old
<b>Travel</b>						
Through a travel agent / tour operator / travel comparison website	36%	38%	35%	39%	38%	30%
Directly with the airline / train / ferry operator	64%	62%	65%	61%	62%	70%
<b>Accommodation</b>						
Through a travel agent / tour operator / travel comparison website	47%	47%	47%	49%	59%	35%
Directly with the accommodation provider	53%	53%	53%	51%	41%	65%
<b>Holiday (Travel &amp; Accommodation)</b>						
Through a travel agent / tour operator / travel comparison website	62%	60%	64%	56%	65%	72%
Directly with the airline / train / ferry operator	21%	22%	20%	24%	19%	16%
Directly with the accommodation provider	17%	18%	16%	20%	16%	12%

QB4: How did you book the following?

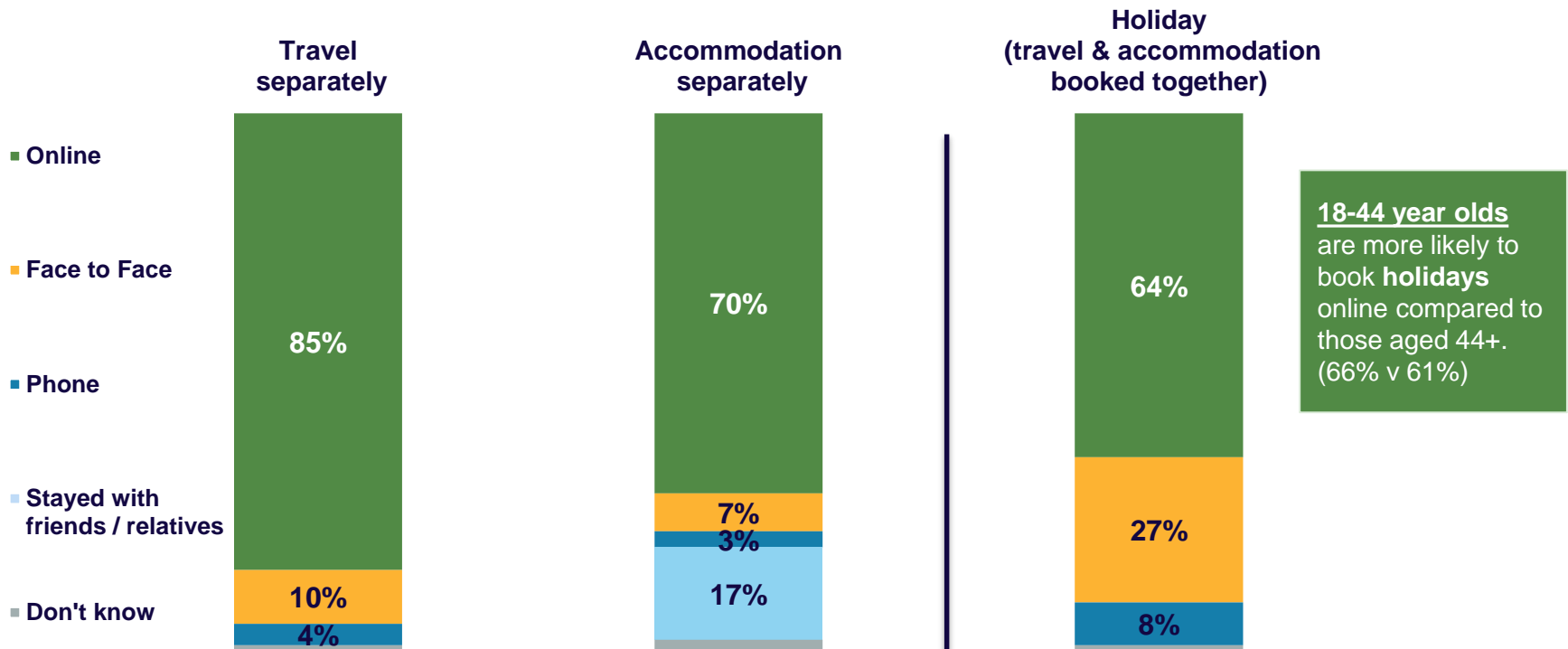
Base: Visitors (4,754), Male (2,408), Female (2,346), 18-34 (1,943), 35 – 54 (1,717), 55+ (1,094)



4. Which modes and devices are used to make travel bookings?

# Method of booking trip to Britain

Most bookings for trips to Britain were done online, with the highest proportion of online bookings made when booking travel separately (85%). Whilst 70% of accommodation bookings were done online, 17% did not have to book as they stayed with friends or relatives. The pattern is slightly different for holiday package bookings, where just over a quarter of visitors booked face to face, although the highest proportion of bookings are still made online.



QB3: Thinking about the last holiday you took to a foreign country: which of the following best describes how you booked your holiday? If someone else made the booking, how did they book the holiday?

Base: Booked travel separately (2,143) and accommodation separately (2,143), Booked travel and accommodation together (2,264)

# Method of booking trip to Britain

## Full market breakdown

**Travel** is most likely to be booked online, and this is highest amongst **Europeans**, where for many markets over 90% booked online.

**Accommodation** also has a high propensity to be booked online, again highest among **Europeans**. A high proportion of those from **New Zealand** (48%) and also from **Australia, Canada and India** did not have to book as they could stay with relatives. A quarter from **Gulf** markets booked their accommodation face to face.

**Holiday** bookings are more varied, with most markets booking online. However, over half of **Russians** booked face to face and more than a third also did so from **Australia, Germany, New Zealand and Spain**.

	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	KOR	SPA	SWE	USA	Gulf*
<b>Travel</b>																			
Online	76%	68%	78%	80%	92%	87%	82%	77%	91%	84%	94%	73%	99%	79%	88%	93%	98%	83%	66%
Face to face	17%	27%	9%	9%	2%	10%	14%	14%	7%	8%	1%	21%	1%	17%	7%	4%	1%	12%	29%
By phone	3%	4%	11%	6%	4%	1%	4%	6%	1%	6%	3%	3%	0%	4%	5%	2%	1%	5%	6%
<b>Accommodation</b>																			
Online	60%	74%	66%	69%	76%	71%	72%	67%	73%	78%	72%	46%	87%	65%	86%	75%	82%	66%	43%
Face to face	6%	15%	6%	9%	2%	5%	10%	7%	9%	7%	6%	2%	1%	13%	4%	7%	1%	11%	24%
By phone	2%	1%	5%	4%	2%	4%	5%	6%	1%	3%	0%	2%	3%	3%	5%	1%	1%	8%	11%
Did not book – stayed with friends / relatives	29%	9%	23%	17%	16%	19%	13%	20%	16%	11%	21%	48%	7%	14%	6%	15%	15%	15%	17%
<b>Holiday (Travel &amp; Accommodation)</b>																			
Online	53%	61%	71%	82%	82%	78%	58%	76%	68%	58%	81%	49%	86%	41%	59%	66%	83%	58%	48%
Face to face	37%	31%	21%	13%	4%	17%	36%	16%	28%	32%	10%	42%	1%	56%	23%	33%	9%	24%	31%
By phone	9%	8%	7%	5%	10%	2%	5%	8%	2%	10%	6%	7%	6%	3%	16%	1%	6%	17%	20%

\*Gulf NET shown instead of Saudi Arabia and UAE individually due to low bases

QB3: How did you book your travel and accommodation to Britain? If someone else made the booking, how did they book the travel?

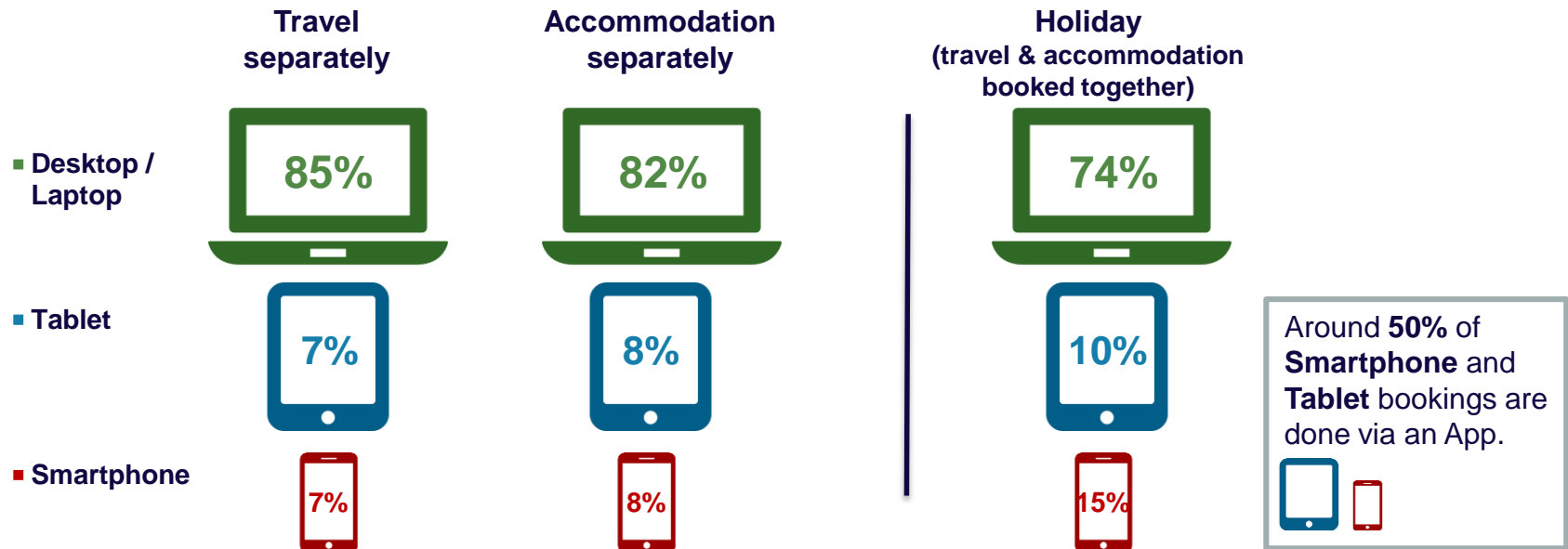
Base: Visitors: Booked separately-travel & accommodation (2,569)/Booked together- holiday (2,703), Australia (173)/(116), Brazil (89)/(202), Canada (133)/(155), China (81)/(212), India (111)/(188), Japan (135)/(155), New Zealand (197)/(100), Russia (98)/(194), Saudi Arabia (53)/(104), South Korea (126)/(174), United States (88)/(201), Denmark (198)/(75), France (148)/(95), Germany (131)/(92), Italy (161)/(132), Netherlands (102)/(78), Norway (179)/(106), Spain (162)/(126), Sweden (178)/(105), Gulf (81/196)



# Devices used by online bookers

Over 80% of online travel or accommodation bookings are done on a **desktop or laptop**, and there is an even split between tablet and smartphone for the remainder of bookings.

Three quarters of those who booked a holiday used a desktop or laptop. For the remaining online holiday bookers, 10% used a tablet, and 15% used a smartphone. Half of those using tablet or smartphone to book their trip elements did so using an app on the device.



QB5: And what did you use to book the following?

Base: Online bookers. Travel - booked separately (3,407), Accommodation - booked separately and didn't stay with friends (2,909), Booked travel and accommodation together (3,135)

# Devices used by online bookers

## Full market breakdown

Whilst laptop or desktop bookings are most common in the majority of markets, China, India, South Korea and Gulf markets are the most likely to use their smartphone or tablet to make bookings.

	TOT	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	KOR	SPA	SWE	USA	GULF
<b>Travel</b>																				
Laptop / desktop	85%	90%	85%	91%	56%	86%	89%	88%	71%	95%	89%	82%	84%	87%	85%	77%	91%	89%	89%	56%
Smartphone (not app)	3%	0%	6%	1%	6%	1%	3%	1%	4%	1%	2%	1%	2%	1%	3%	7%	1%	0%	2%	16%
Smartphone app	4%	0%	5%	2%	27%	1%	2%	2%	19%	1%	3%	2%	1%	0%	2%	14%	2%	0%	1%	15%
Tablet (not app)	4%	5%	2%	3%	5%	7%	3%	5%	3%	2%	3%	8%	6%	6%	6%	0%	4%	6%	4%	5%
Tablet app	2%	2%	3%	2%	6%	1%	2%	1%	2%	1%	2%	1%	4%	4%	4%	1%	2%	2%	3%	5%
Don't know	2%	2%	0%	1%	0%	5%	1%	1%	0%	0%	2%	6%	3%	2%	0%	1%	0%	3%	1%	2%
<b>Accommodation</b>																				
Laptop / desktop	82%	89%	81%	89%	46%	83%	86%	88%	66%	92%	87%	78%	81%	86%	80%	72%	91%	88%	88%	51%
Smartphone (not app)	3%	1%	4%	2%	7%	2%	4%	2%	6%	1%	2%	3%	3%	1%	10%	10%	1%	2%	3%	12%
Smartphone app	5%	1%	8%	2%	36%	1%	0%	1%	14%	2%	3%	5%	3%	0%	2%	13%	0%	0%	2%	19%
Tablet (not app)	5%	4%	4%	3%	2%	6%	7%	7%	6%	3%	3%	9%	7%	7%	3%	1%	5%	6%	4%	8%
Tablet app	3%	2%	2%	2%	9%	2%	2%	1%	9%	2%	4%	1%	3%	3%	4%	4%	2%	2%	3%	6%
Don't know	2%	2%	1%	2%	0%	5%	1%	1%	0%	0%	1%	5%	3%	2%	1%	1%	0%	2%	1%	5%
<b>Holiday (Travel &amp; Accommodation)</b>																				
Laptop / desktop	74%	78%	69%	82%	48%	88%	82%	92%	62%	76%	82%	85%	77%	88%	84%	69%	87%	89%	67%	48%
Smartphone (not app)	7%	5%	11%	3%	15%	1%	10%	3%	10%	8%	7%	0%	4%	1%	2%	6%	3%	2%	9%	16%
Smartphone app	8%	1%	9%	4%	24%	0%	2%	1%	16%	6%	6%	3%	3%	0%	5%	14%	3%	0%	11%	15%
Tablet (not app)	5%	7%	8%	6%	4%	9%	3%	2%	5%	4%	3%	7%	8%	10%	4%	1%	2%	6%	6%	10%
Tablet app	4%	6%	3%	4%	8%	0%	3%	0%	7%	4%	2%	2%	3%	1%	5%	6%	3%	2%	6%	11%
Don't know	1%	3%	1%	0%	0%	2%	0%	2%	0%	2%	1%	2%	5%	1%	0%	3%	1%	1%	1%	1%

QB5 And what did you use to book the following?

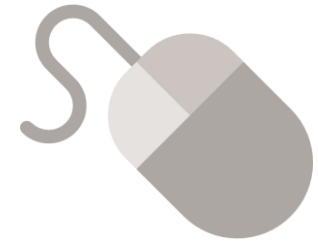
Base: Online bookers. Total (3,135), Australia (130), Brazil (190), Canada (178), China (261), India (267), Japan (162), New Zealand (100), Russia (112), Gulf (191), South Korea (177), United States (232), Denmark (130), France (118), Germany (102), Italy (191), Netherlands (82), Norway (169), Spain (173), Sweden (170)



## 5. Online travel agents & comparison sites

# Booking through online travel agencies

## % agree with following statements



More than two thirds agree that online travel agencies are good for **comparing prices**, are **easy to use** and good for finding something **within budget**.

However, there is low brand loyalty as **only a third would book with the same agency** each time. Also, **few value the human touch** of booking via phone or face to face (just 38%).

# Booking through online travel agencies

## Full market breakdown

Gulf markets, India and China display high OTA loyalty with more than half saying they usually stick with just one OTA.

	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA
I often compare prices from the websites of multiple online travel agencies	68%	83%	75%	80%	58%	68%	62%	82%	74%	65%	63%	73%	63%	78%	66%	70%	73%	60%	64%	79%
They are easy to use	66%	81%	74%	81%	58%	74%	65%	81%	72%	70%	63%	65%	58%	65%	70%	69%	73%	58%	63%	78%
Online travel agencies are a good way of finding a destination within my budget	60%	76%	72%	80%	60%	61%	64%	79%	67%	64%	61%	66%	60%	71%	70%	70%	66%	60%	58%	75%
I get a wider choice in one place than when I book with an individual provider directly	56%	73%	62%	78%	54%	53%	57%	79%	62%	61%	49%	52%	56%	68%	66%	61%	60%	52%	60%	69%
Best way of getting the lowest price	54%	67%	61%	64%	45%	51%	55%	74%	59%	52%	45%	50%	38%	47%	65%	63%	61%	51%	58%	66%
Good customer service if there is a problem with the booking/trip	41%	70%	51%	71%	20%	34%	35%	75%	46%	42%	30%	37%	24%	51%	59%	50%	44%	26%	56%	60%
There is not much difference between online travel agencies	44%	43%	48%	47%	36%	46%	33%	56%	30%	41%	33%	34%	31%	38%	47%	50%	34%	34%	49%	54%
I prefer the human touch when booking via phone or face to face	37%	53%	41%	61%	15%	32%	27%	59%	35%	38%	21%	40%	10%	58%	54%	42%	37%	20%	53%	50%
I usually book with one specific online travel agency rather than considering alternatives	29%	47%	38%	56%	16%	17%	18%	62%	30%	39%	20%	25%	12%	42%	55%	42%	27%	24%	53%	49%

QR7: To what extent do you agree with the following statements about booking travel through online travel agencies such as Lastminute.com or Expedia? (Strongly agree or Agree)

Base: All participants (10,309), Australia (600), Brazil (500), Canada (550), China (500), India (600), Japan (450), New Zealand (550), Russia (500), Saudi Arabia (350), South Korea (500), United Arab Emirates (255), United States (600), Denmark (500), France (600), Germany (554), Italy (600), Netherlands (500), Norway (500), Spain (600), Sweden (500)

# Booking through online travel agencies

## Age and Gender

Men are more likely to think that there is **little difference** between online travel agencies; 44% of men agree compared to 38% of women. Men are also more likely to be brand loyal, as 37% say they would always book with the same agency, compared to just 31% of women.

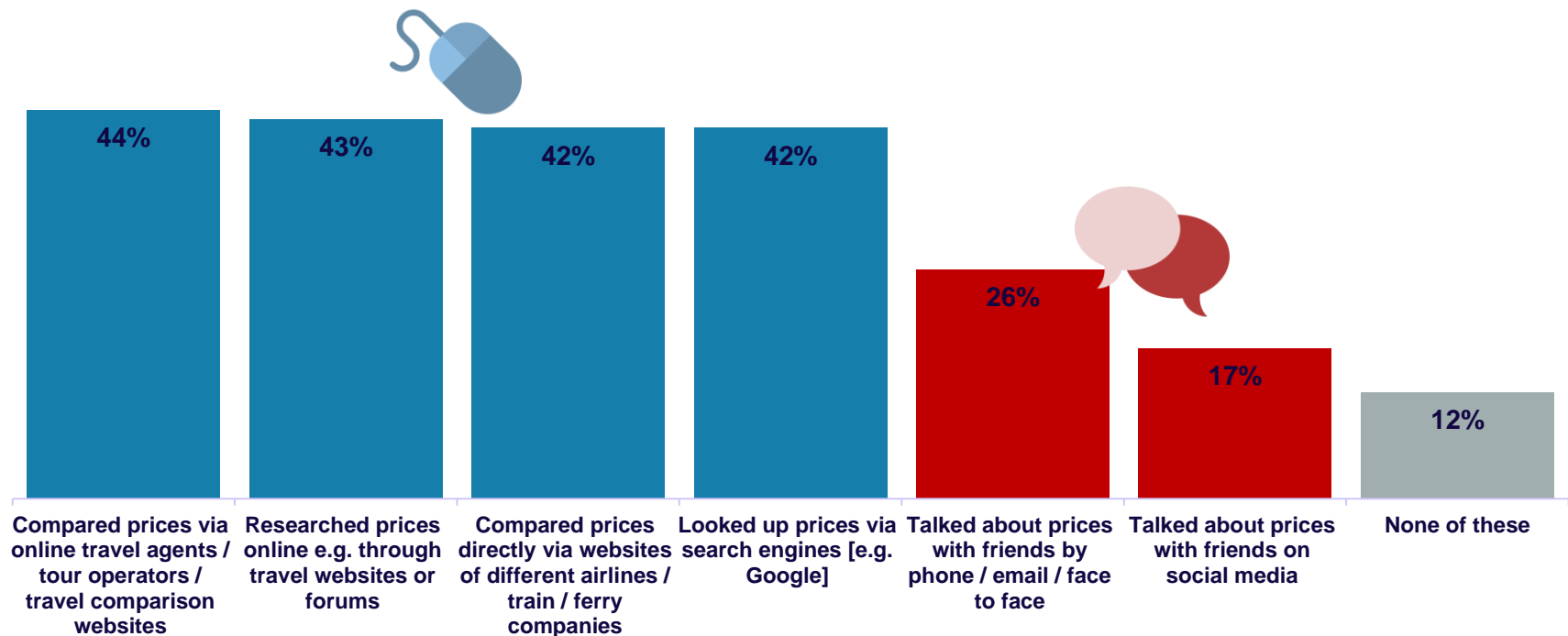
In terms of age, the younger age group (those aged under 34) are **more enthusiastic about online travel agents overall**, and especially about the ease of use. Three quarters of this age group say that they often compare prices from multiple sites, and that they are 'easy to use'.

	Male	Female	18-34 years	35-54 years	55+ years old
They are usually the best way of getting the lowest price	56%	56%	60%	58%	47%
There is not much difference between online travel agencies	44%	38%	45%	42%	34%
I usually book with one specific online travel agency rather than considering alternatives	37%	31%	40%	34%	25%
I often compare prices from the websites of multiple online travel agencies	69%	72%	74%	73%	61%
They would offer good customer service if there is a problem with the booking/trip	47%	44%	50%	46%	39%
I prefer the human touch when booking via phone or face to face	41%	36%	40%	38%	37%
They are easy to use	68%	71%	72%	71%	62%
More convenient (a wider choice in one place than booking with an individual provider directly)	61%	62%	65%	64%	52%
Online travel agencies are a good way of finding a destination within my budget	66%	69%	70%	70%	59%

# Pre-booking price comparison

Just one in ten people booked their last trip without doing any kind of price comparison.

The most popular way (44%) to price compare is to use third party agents, operators or comparison sites. Two fifths also used travel websites or forums, compared directly with travel companies and via search engines. Knowledge of friends and family is also regarded as useful, as a quarter discussed prices with their friends before booking, and 17% used social media to chat to friends about prices.



QR4: Before booking your holiday to Britain/your last holiday, which of the following did you do?

Base: All participants (10,309)

# Pre-booking price comparison

## Full market breakdown

Travellers from China, India, Brazil and Gulf markets are more likely to talk about prices with friends using social media before booking a trip.

Denmark, Netherlands, France, Germany and Japan were more likely to say they booked without doing any price comparison.

**% travellers who would do the following before booking**

	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NOR	NZ	RUS	SAU	KOR	SPA	SWE	UAE	USA
Compared prices directly via websites of different airlines / train / ferry companies	49%	48%	46%	37%	33%	37%	37%	54%	46%	25%	35%	48%	50%	45%	38%	31%	42%	41%	53%	49%
Compared prices via online travel agents / tour operators / travel comparison websites	41%	59%	38%	61%	31%	33%	35%	58%	41%	41%	34%	36%	46%	57%	39%	53%	48%	37%	48%	38%
Looked up prices via search engines [e.g. Google]	49%	54%	46%	49%	31%	39%	36%	56%	45%	30%	33%	25%	50%	54%	39%	48%	42%	28%	44%	45%
Researched prices online e.g. through travel websites or forums	47%	56%	44%	54%	29%	26%	35%	54%	49%	47%	25%	44%	47%	56%	39%	56%	37%	29%	49%	46%
Talked about prices with friends on social media	8%	33%	14%	45%	3%	6%	9%	43%	10%	11%	7%	6%	11%	25%	30%	25%	12%	6%	39%	24%
Talked about prices with friends by phone / email / face to face	29%	32%	31%	38%	16%	18%	29%	49%	22%	14%	12%	16%	30%	33%	35%	22%	21%	17%	44%	30%
None of these	12%	3%	11%	1%	27%	19%	19%	2%	7%	19%	26%	17%	12%	4%	5%	4%	9%	19%	4%	9%

QR4: VISITORS: Before booking your holiday to Britain, which of the following did you do? CONSIDERERS: Before booking the last holiday you took to a foreign country, which of the following did you do?

Base: All participants (10,309), Australia (600), Brazil (500), Canada (550), China (500), India (600), Japan (450), New Zealand (550), Russia (500), Saudi Arabia (350), South Korea (500), United Arab Emirates (255), United States (600), Denmark (500), France (600), Germany (554), Italy (600), Netherlands (500), Norway (500), Spain (600), Sweden (500)





## 6. Bookable products

# Bookable products purchased

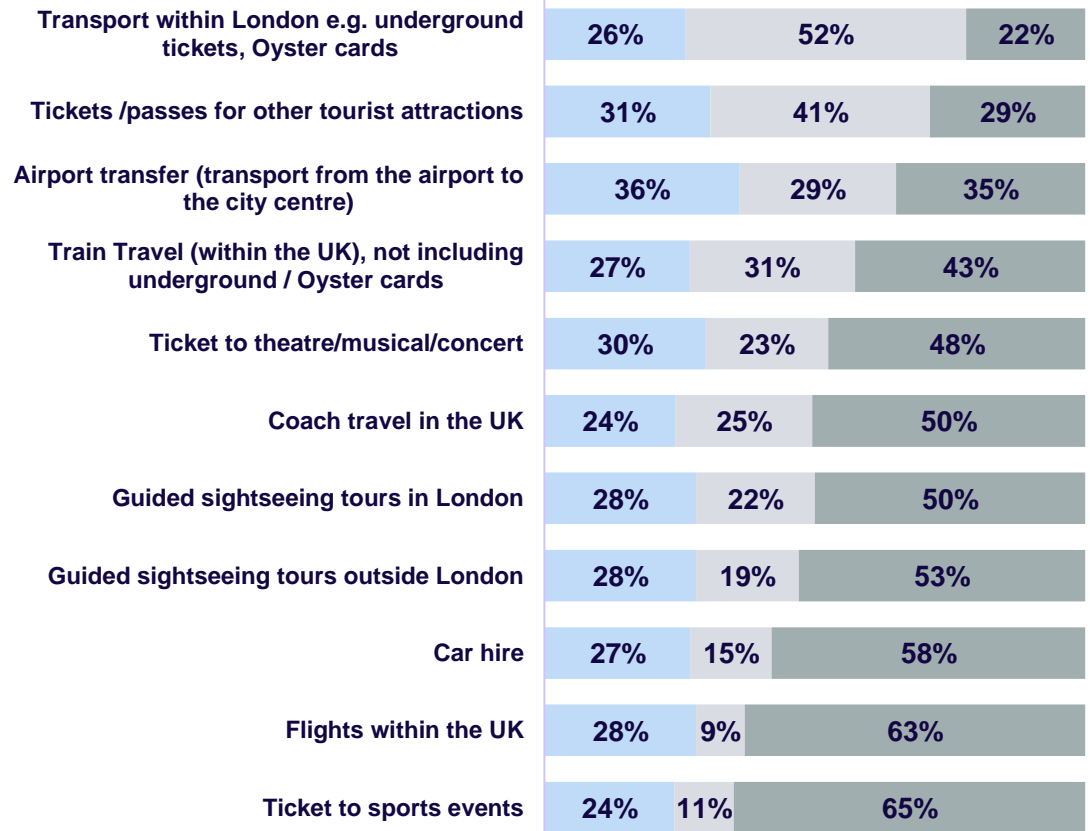
The most often purchased products in general are transport within London, tickets for tourist attractions and airport transfers.

London transport is more likely to be purchased during the visit, as are tickets for tourist attractions, although some do book in advance for these elements.

Airport transfers are more likely to be purchased before arrival, as are tickets to any theatre, musicals or concerts and any guided sightseeing tours, in our out of London.

Whilst a minority are purchasing tickets to sporting events, those are likely to be sorted before the visit, as are any internal flights or car hire.

## Products purchased by visitors

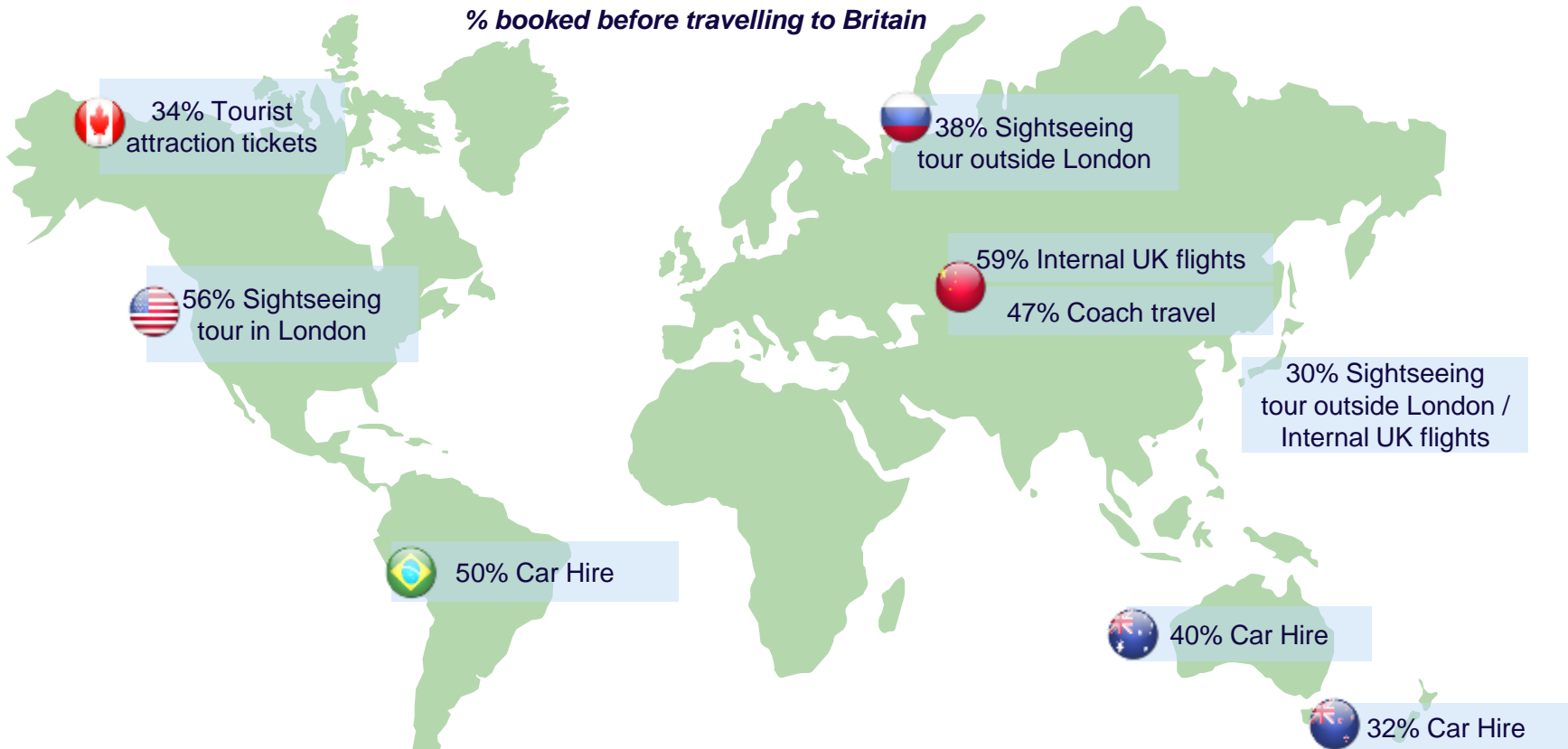


■ Before visit ■ During visit ■ Did not buy

# Products purchased before or during visit

## Top per market

Travellers from Australia and New Zealand are most likely to purchase car hire above any other bookable product before their trip; however, their purchase of activity products is low. Those from China and Japan are more likely to have purchased internal flights within the UK, and China and the USA are most likely to have pre-purchased any coach travel within the UK.



**QB9: VISITORS** Did you buy the following when you visited Britain and, if so, when?

**Base:** Total Visitors (4,754), Australia (300), Brazil (250), Canada (250), China (200), India (300), Japan (200), New Zealand (250), Russia (200), Saudi Arabia (175), South Korea (200), United Arab Emirates (125), United States (300), Denmark (200), France (300), Germany (254), Italy (300), Netherlands (200), Norway (250), Spain (300), Sweden (200)

# Bookable transport products

## Key market breakdown

■ Bought prior to trip  
■ Bought during trip

% of visitors who booked the following:																				
	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NZ	NET	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA
Transport within London e.g. underground tickets, Oyster cards	22%	40%	32%	38%	16%	12%	22%	51%	24%	18%	16%	14%	14%	24%	51%	29%	16%	10%	40%	50%
	54%	50%	46%	48%	50%	65%	47%	43%	60%	53%	64%	42%	53%	63%	39%	54%	65%	59%	45%	33%
Train Travel (within the UK), not including underground / Oyster cards	24%	43%	32%	44%	12%	14%	18%	50%	20%	26%	23%	12%	14%	25%	50%	32%	17%	10%	34%	51%
	32%	36%	30%	36%	20%	22%	27%	37%	27%	27%	39%	26%	28%	41%	30%	33%	36%	30%	47%	22%
Airport transfer (transport from the airport to the city centre)	33%	54%	33%	54%	30%	19%	30%	60%	39%	24%	28%	14%	14%	37%	53%	38%	37%	25%	50%	63%
	23%	28%	30%	29%	32%	19%	20%	29%	43%	35%	24%	20%	26%	37%	33%	41%	39%	38%	29%	13%
Coach travel/Long distance bus in the UK	21%	40%	26%	47%	6%	8%	13%	50%	20%	18%	21%	10%	6%	25%	49%	34%	14%	7%	42%	49%
	13%	32%	18%	42%	12%	44%	15%	29%	24%	23%	16%	20%	22%	55%	31%	24%	34%	15%	36%	12%
Car hire	40%	50%	31%	35%	6%	13%	23%	49%	17%	20%	32%	10%	10%	22%	50%	32%	17%	10%	48%	52%
	9%	18%	17%	30%	2%	5%	7%	43%	10%	5%	15%	6%	1%	32%	29%	18%	9%	3%	42%	20%
Flights within the UK	27%	47%	32%	59%	3%	10%	12%	64%	22%	30%	22%	10%	2%	24%	51%	35%	14%	11%	58%	53%
	6%	12%	9%	24%	0%	2%	1%	16%	5%	6%	10%	3%	2%	13%	20%	24%	6%	2%	23%	8%

QB9: VISITORS Did you buy the following when you visited Britain and, if so, when?

Base: Total Visitors (4,754), Australia (300), Brazil (250), Canada (250), China (200), India (300), Japan (200), New Zealand (250), Russia (200), Saudi Arabia (175), South Korea (200), United Arab Emirates (125), United States (300), Denmark (200), France (300), Germany (254), Italy (300), Netherlands (200), Norway (250), Spain (300), Sweden (200)

# Bookable activity products

## Key market breakdown

■ Bought prior to trip  
■ Bought during trip

% of visitors who booked the following:																				
	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NZ	NET	NOR	RUS	SAU	KOR	SPA	SWE	UAE	USA
Theatre / Musical / Concert tickets	24%	46%	28%	48%	22%	13%	19%	49%	22%	29%	14%	23%	19%	35%	46%	38%	21%	21%	32%	52%
	24%	38%	28%	24%	14%	11%	19%	33%	19%	8%	14%	30%	18%	29%	27%	20%	24%	19%	45%	25%
Sporting event tickets	18%	38%	22%	48%	6%	10%	9%	53%	16%	18%	13%	16%	12%	30%	43%	34%	13%	14%	44%	48%
	11%	24%	15%	14%	2%	2%	6%	17%	7%	3%	4%	10%	4%	18%	18%	19%	8%	6%	40%	14%
Guided sightseeing tours in London	22%	52%	31%	51%	6%	13%	17%	58%	21%	30%	8%	20%	3%	36%	50%	40%	21%	6%	51%	56%
	22%	23%	26%	30%	11%	23%	22%	33%	28%	9%	5%	20%	8%	50%	26%	25%	24%	17%	30%	20%
Guided sightseeing tours outside of London	21%	50%	31%	54%	5%	10%	16%	60%	20%	29%	8%	18%	5%	38%	49%	40%	19%	8%	38%	56%
	21%	18%	22%	29%	4%	15%	25%	29%	19%	9%	7%	18%	11%	40%	29%	20%	19%	10%	39%	18%
Tickets / passes for other tourist attractions	28%	50%	34%	50%	16%	15%	24%	57%	26%	20%	11%	20%	14%	31%	49%	42%	24%	16%	34%	57%
	44%	42%	42%	40%	42%	49%	37%	36%	42%	19%	44%	51%	40%	57%	28%	40%	48%	36%	34%	30%

QB9: VISITORS Did you buy the following when you visited Britain and, if so, when?

Base: Total Visitors (4,754), Australia (300), Brazil (250), Canada (250), China (200), India (300), Japan (200), New Zealand (250), Russia (200), Saudi Arabia (175), South Korea (200), United Arab Emirates (125), United States (300), Denmark (200), France (300), Germany (254), Italy (300), Netherlands (200), Norway (250), Spain (300), Sweden (200)

# Bookable products

## Age and Gender

Men are generally more likely than women to pre-purchase tickets and additional trip elements before their trip. They are more likely to pre-purchase UK train travel, airport transfers, car hire and internal flights.

There is a direct relationship between age of traveller and their likelihood to pre-book products. Those aged 18-34 are the most likely to pre-book before travelling across all the products listed on the right. On the other end of the scale, those aged 55+ are least likely to pre-purchase. The gap is widest for purchasing internal flights, sports tickets and coach travel in particular.

% of visitors who booked the following:	% of visitors who booked the following:		18-34 years	35-54 years	55+ years old
	Male	Female			
Transport within London e.g. underground tickets, Oyster cards	28%	23%	34%	24%	13%
	51%	54%	51%	55%	51%
Train Travel (within the UK), not including underground / Oyster cards	30%	24%	36%	25%	15%
	31%	31%	31%	35%	24%
Airport transfer (transport from the airport to the city centre)	39%	33%	44%	34%	25%
	29%	30%	28%	32%	29%
Coach travel/Long distance bus in the UK	27%	22%	34%	22%	11%
	23%	26%	27%	26%	20%
Car hire	30%	24%	34%	26%	18%
	17%	13%	17%	17%	9%
Flights within the UK	31%	25%	38%	26%	13%
	10%	8%	11%	10%	5%
Theatre / Musical / Concert tickets	32%	28%	37%	29%	18%
	23%	23%	24%	23%	19%
Sporting event tickets	29%	19%	33%	24%	9%
	14%	8%	13%	12%	6%
Guided sightseeing tours in London	31%	26%	37%	27%	15%
	23%	22%	21%	25%	20%
Guided sightseeing tours outside of London	31%	25%	36%	27%	15%
	20%	18%	18%	21%	18%
Tickets / passes for other tourist attractions	33%	28%	38%	30%	19%
	40%	42%	40%	44%	39%



# Booking a holiday

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