

Reasons to return to a holiday destination

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Introduction

The following report is based on a question sponsored by VisitBritain in an IPSOS survey in July-September 2019:

- *For respondents who responded they previously visited the UK for holiday:*

“Which of the following would encourage you to travel back to the United Kingdom for a holiday?”

- *For other respondents:*

“Which of the following would encourage you to travel back to a country for a holiday?”

Respondents had to pick as many reasons as they wanted in a list, randomly ordered.

The survey was conducted online amongst respondents from Argentina (AR), Australia (AU), Brazil (BR), Canada (CA), China (CH), Egypt (EG), France (FR), Germany (GE), India (IN), Italy (IT), Japan (JA), Mexico (ME), Poland (PO), Russia (RU), South Africa (SA), South Korea (SK), Sweden (SE), Turkey (TU) and USA (US) in July – August 2019 (about 1,000 respondents for each inbound market), and in two extra markets, Spain (SP) and The Netherlands (NL) in September – October 2019 (about 1,000 respondents for each inbound market). Respondents are representative of the online population in each market. Some will have therefore visited the UK before but some will not.

When looking at the percentage who are interested in each activity, it is important to note the context that each respondent saw a long list of 14 activities they could pick from (15 for some markets). A percentage score for a given activity should therefore be put into the context of those given to other activities, or compared to other markets or demographic groups, and does not necessarily represent the total potential interest level for the activity.

All market-level scores 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. Market-level rankings are based on those adjusted scores too.

Overview of proposed reasons to return

- Positive interactions with locals the last time respondent visited
- Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)
- Ease to get to the country for respondent
- Seeing friends/relatives in the country
- The local food and drink
- Visiting a different part of the country
- Going back to the same part of the country
- Going back to the same sights/attractions again
- The country caters well to tourists
- Ease to get around the country
- Experience a new activity respondent did not do last time
- Going back to see the sights/attractions respondent did not see the previous time
- Staying in the same accommodation
- Learning new skills or crafts

- Other
- I do not intend to go back to the UK for a holiday again
- Ease to get a visa to this country (only respondents from China, India, Russia, South Africa, Turkey)

Reasons to return – How to read the results

There are three different types of scores and rankings in this report:

- **Overall** scores and rankings: these take into account both answers of previous visitors to the UK answering about what would influence them to go back to the UK, and answers to the more generic question about what would influence people to go back to any destination for a holiday. Detailed results for those scores and rankings are commented on in part 1 of this report.
- Scores and rankings for **previous visitors to the UK**: these are detailed in part 2 of this report.
- Scores and rankings for reasons to return **to a destination in general (or ‘generic destinations’)**: these are the scores given by respondents who did not answer about returning to the UK in particular but about returning to a destination in general. Some of them might have been to the UK before for holidays, but they did not answer about any specific destinations. These scores and rankings are mentioned in part 2 of this report to compare to reasons to return to the UK.
- In part 3 of this report (market slides), we include all three of these measures: we include the ‘overall’ ranking to benchmark the market vs all-market average rankings. We also comment on previous visitors’ propensity to pick a reason to return to the UK, and compare to the all-market average propensity to return to a generic destination.

Highlights

- **Overall**, holidaymakers are more influenced by the local food and drink, and making new discoveries (seeing other sights/attractions or visiting a different part of the country) when deciding to return to a country for holiday. About 2-in-5 respondents would be influenced by each of those top 3 reasons to return. They are closely followed by other practical considerations: perceptions of how well the destination caters to tourists and the ease of getting around.
- Looking at why people would go **back to the UK** specifically, exploring holds more influence: the first two reasons why previous inbound visitors would go back for a holiday are visiting a different part of the UK and seeing the sights and attraction they did not see the first time.
- The main difference between reasons to return to the UK, or to a destination in general, is the **local food and drink**: 24% of previous visitors to the UK say it would be an influence for them to go back vs 45% of those considering returning to any destination.
- Looking across inbound markets, **some factors consistently appear in the top reasons**. For example, local food and drink appears within each market's top 5 reasons to return to a country for holidays overall, except Egypt. Top reasons to return to the UK were also quite similar across markets. Chinese respondents, however, would rate the ease of getting around, experiencing a new activity, ease of getting to the destination, and learning a new skill/craft as more of a reason to come to return to the UK.
- **Demographics**: there are few differences between women's and men's rankings of influences. There are more differences across age group. Interestingly, learning new skills/crafts and seeing friends and relatives hold more influence with younger age groups. Accessible facilities for people with special needs are also more of a reason to return to a country for holidays overall, or to the UK in particular, with the 25-34 age group, suggesting that it is a driver for some young families and not just for the elderly.



1. Overall reasons to return to a holiday destination

Why people go back to a holiday destination

Despite culture usually being a key driver for picking a holiday destination, reasons to return to a destination for a holiday are split between the appeal of new discoveries and more practical aspects.

Over 2-in-5 people would go back to an overseas destination on holiday for its local food and drink offering. A similar share would go back to see the sights and attractions they have not seen the previous time, or to visit a different part of the country. These reasons are closely followed by valuing a country that caters well to tourists, or which is easy to get around.



1. The local food / drink 42%



2. Go back to see the sights/attractions not seen the previous time 40%



3. Visit a different part of the country 40%



4. The country caters well to tourists 38%



5. The country is easy to get around 38%

Reasons to return to a destination overall – rankings by market

Reasons to return	ALL	AR	AU	BR	CA	CH	EG	FR	GE	IN	IT	JA	ME	NL	PO	RU	SA	SK	SP	SE	TU	US
The local food/drink	1	4	4	3	2	1	8	2	3	4	4	1	1	4	4	4	3	1	3	2	3	1
Go back to see the sights/attractions I didn't see the previous time	2	1	1	7	3	6	7	3	4	8	6	5	5	3	3	3	7	2	2	3	2	2
Visit a different part of the country	3	2	2	2	4	7	5	1	5	1	1	6	2	1	2	7	2	7	1	4	6	4
The country caters well to tourists	4	5	9	1	7	3	1	4	7	7	3	2	4	5	1	1	5	6	4	10	1	8
The country is easy to get around	5	6	3	5	1	4	2	6	1	3	2	4	7	7	8	2	6	5	5	7	4	3
The country is easy to get to for me	6	7	6	6	5	5	3	5	2	10	5	3	10	2	7	6	10	4	6	5	9	6
Experience a new activity I did not do last time	7	3	5	4	9	2	4	8	9	2	8	7	3	6	5	8	1	3	7	1	7	5
Positive interactions with locals the last time I visited	8	9	7	8	6	9	6	7	6	6	7	8	6	8	6	5	4	8	9	6	5	7
See friends/relatives in the country	9	8	8	9	8	10	9	9	8	5	9	11	8	9	9	10	8	10	8	9	10	9
Learning new skills or crafts	10	12	13	10	13	8	10	12	13	9	10	13	9	13	10	11	9	13	12	8	8	11
Go back to the same sights/attractions again	11	11	11	11	10	11	11	11	11	12	14	12	11	12	11	9	14	9	10	13	11	10
Go back to the same part of the country	12	10	10	13	11	13	13	10	10	14	12	9	13	11	12	13	13	11	11	11	12	13
Stay in the same accommodation	13	13	12	12	12	12	14	14	12	13	11	10	14	10	13	12	11	12	13	12	14	12
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	14	14	14	14	14	12	13	14	11	13	14	12	14	14	14	12	14	14	14	13	14
Other	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15

Source: IPSOS; 21,040 respondents across 21 markets (1000-1006 per market). These include respondents answering about what would influence them to go back to the UK, and answering the more generic question about going back to a generic destination.

Reasons to return to a destination overall – scores by market

Reasons to return	ALL	AR	AU	BR	CA	CH	EG	FR	GE	IN	IT	JA	ME	NL	PO	RU	SA	SK	SP	SE	TU	US
The local food/drink	42%	39%	38%	41%	41%	46%	33%	50%	40%	31%	40%	69%	51%	42%	37%	42%	39%	57%	41%	42%	38%	43%
Go back to see the sights/attractions I didn't see the previous time	40%	49%	44%	31%	41%	35%	34%	42%	38%	29%	38%	39%	41%	43%	38%	44%	34%	54%	45%	42%	39%	40%
Visit a different part of the country	40%	43%	43%	42%	36%	29%	35%	53%	37%	36%	50%	30%	43%	53%	40%	29%	39%	30%	57%	39%	32%	37%
The country caters well to tourists	38%	34%	30%	48%	31%	41%	45%	41%	30%	31%	42%	55%	41%	37%	46%	51%	36%	32%	41%	19%	41%	31%
The country is easy to get around	38%	32%	43%	38%	41%	38%	45%	36%	44%	32%	47%	46%	27%	30%	32%	46%	35%	38%	39%	30%	35%	38%
The country is easy to get to for me	35%	27%	34%	34%	35%	37%	38%	41%	42%	27%	39%	53%	17%	44%	34%	35%	27%	47%	34%	39%	27%	33%
Experience a new activity I did not do last time	34%	42%	36%	39%	29%	42%	35%	25%	21%	33%	25%	24%	42%	32%	36%	24%	39%	49%	33%	46%	31%	36%
Positive interactions with locals the last time I visited	30%	26%	32%	28%	34%	25%	34%	29%	35%	31%	30%	14%	29%	26%	34%	42%	37%	22%	21%	36%	34%	33%
See friends/relatives in the country	25%	26%	31%	26%	30%	24%	25%	24%	23%	31%	19%	11%	27%	23%	29%	20%	34%	16%	24%	24%	26%	27%
Learning new skills or crafts	18%	17%	12%	18%	11%	26%	23%	10%	12%	28%	19%	11%	24%	10%	20%	14%	27%	6%	12%	27%	30%	16%
Go back to the same sights/attractions again	16%	19%	14%	13%	18%	15%	19%	13%	20%	21%	9%	11%	16%	12%	14%	20%	10%	17%	14%	11%	24%	17%
Go back to the same part of the country	14%	22%	14%	10%	18%	12%	10%	15%	21%	18%	11%	12%	11%	14%	11%	9%	11%	10%	13%	19%	14%	13%
Stay in the same accommodation	12%	11%	12%	12%	17%	13%	6%	7%	16%	20%	11%	11%	10%	15%	11%	10%	12%	10%	11%	13%	9%	14%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	9%	5%	7%	10%	8%	10%	10%	7%	9%	24%	10%	5%	12%	7%	9%	5%	11%	4%	6%	5%	12%	9%
Other	2%	1%	3%	1%	3%	1%	2%	2%	4%	1%	2%	2%	0%	5%	1%	1%	1%	1%	2%	2%	2%	5%

Main differences observed among markets

- Reasons why people would go back to a country for holiday vary by market. However, there are some similarities across some regions, or culturally close markets. For example, all **long-haul English-speaking markets** – Australia, Canada and the USA – chose the same reasons to return in their top 4: the local food and drink, exploring new sights/attractions, a different part of the country and ease to get around. They also all rank relatively lower the importance of the destination catering well to tourists (but still 3 in 10 would pick it).
- India, Mexico, and South Africa (10th) and Turkey (9th) all rank the **ease of getting to the destination** lower than any other market (global average of 6th). Egypt is very different too: the local food and drink, or seeing new sights/attractions, are less important reasons to return overall, ranking 8th and 7th for Egyptians respectively.
- **Japan values familiarity as a reason to return** more than any other market: they rank ‘going back to same part of the country’ 9th, compared to a global average of 12th. Russia and South Korea are also keener than average on going back to same attractions or sights (9th vs 11th respectively). Japanese and Dutch respondents are more likely to say that staying in the same accommodation is a reason to go back to a destination.
- **Japanese and South Koreans** are also more likely to come back to a destination for its local food and drink: 69% and 57% respectively, vs 42% for the all-market average. **Mexico** clearly under-indexes on valuing ease of getting to the destination country with only 17% picking it as an influencing factor (vs 35% across all markets), whilst **Sweden** is clearly less influenced than the all-market average by perceptions of a country that caters well to tourists (19% vs 38% respectively).
- Most **European markets** are less likely to choose a new activity as a reason to return: 21% in Germany, 24% in Russia, 25% in France and Italy, vs 34% across all markets. Northeast Asian markets are less likely to say that positive interactions with locals the last time they visited is a reason to return: 25% for China, 14% for Japan, and 22% for South Korea vs the global total of 30%. Argentinean, Dutch and Spanish respondents are also less influenced by this reason.
- **Accessibility** is of much higher importance to Indians: 24%, vs 9% across all markets.

Reasons to return to a destination, by gender

Reasons to return	ALL	Men	Women
The local food/drink	42%	42%	43%
Go back to see the sights/attractions I didn't see the previous time	40%	36%	43%
Visit a different part of the country	40%	37%	42%
The country caters well to tourists	38%	38%	38%
The country is easy to get around	38%	37%	38%
The country is easy to get to for me	35%	35%	35%
Experience a new activity I did not do last time	34%	32%	37%
Positive interactions with locals the last time I visited	30%	29%	32%
See friends/relatives in the country	25%	24%	26%
Learning new skills or crafts	18%	18%	19%
Go back to the same sights/attractions again	16%	15%	17%
Go back to the same part of the country	14%	14%	14%
Stay in the same accommodation	12%	12%	12%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	9%	9%	9%
Other	2%	2%	2%

- Women are more likely than men to say that looking for new things to do is a reason to a return to a country. They are more likely to be motivated by going back to experience new activities or seeing new sights/attractions, or visiting a different part of the country.
- Women are also more likely than men to return to a country for holiday if they had positive interactions with locals the last time they visited.

Source: IPSOS; 21,040 respondents across 21 markets (10,491 women, 10,549 men). These include respondents answering about what would influence them to go back to the UK, and answering the more generic question about what would influence people to go back to any destination.

Reasons to return to a destination, by age

Reasons to return	ALL	18-24	25-34	35-54	55+
The local food/drink	42%	41%	42%	44%	41%
Go back to see the sights/attractions I didn't see the previous time	40%	37%	36%	40%	45%
Visit a different part of the country	40%	37%	36%	41%	44%
The country caters well to tourists	38%	32%	35%	40%	41%
The country is easy to get around	38%	37%	37%	39%	38%
The country is easy to get to for me	35%	31%	31%	37%	39%
Experience a new activity I did not do last time	34%	38%	36%	34%	30%
Positive interactions with locals the last time I visited	30%	32%	31%	30%	29%
See friends/relatives in the country	25%	29%	24%	24%	24%
Learning new skills or crafts	18%	27%	22%	16%	10%
Go back to the same sights/attractions again	16%	18%	17%	17%	12%
Go back to the same part of the country	14%	14%	14%	15%	12%
Stay in the same accommodation	12%	13%	12%	12%	11%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	9%	11%	11%	9%	7%
Other	2%	1%	1%	2%	4%

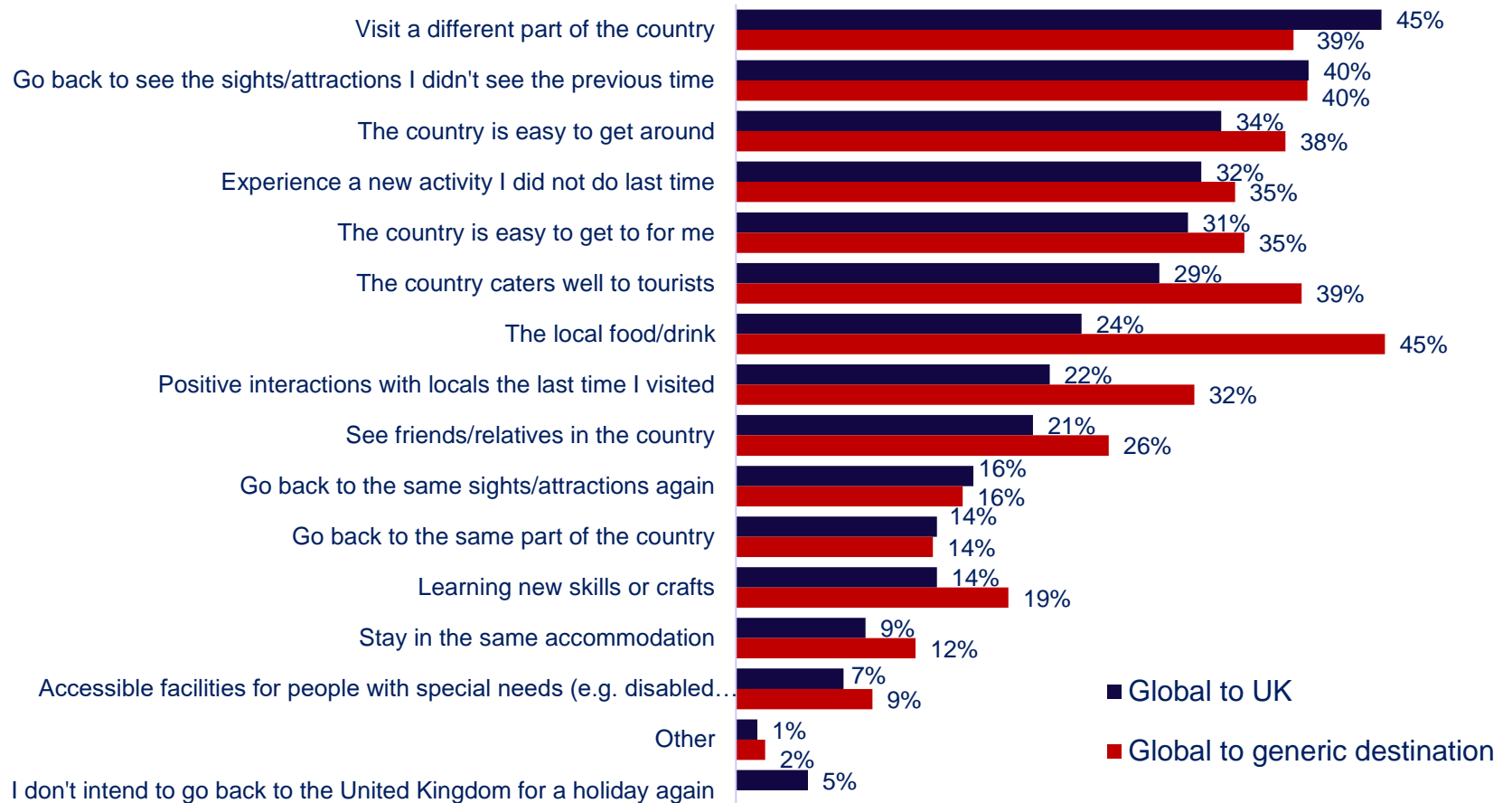
- The influencing factors across the 18-24 age group are more distinctive than for other age groups. Especially for social interactions: they are both more likely than average to return to a country for a holiday to see friends and relatives or because of previous positive interactions with locals.
- Ease of getting to a country is more of a reason to come back for the 55+ cohort, and less so for under-35s.
- The 55+ are also more likely to be motivated by returning to see new sights/attractions or to visit a new place in that country.
- Learning new skills or crafts is much more of a reason to return the younger the travellers are. To an extent, this is also true for the influence of experiencing a new activity they did not do during their previous visit.
- Interestingly, the 18-34s are more likely to return due to accessible facilities – perhaps a key motivation for young families not just for elderly people.

Source: IPSOS; 21,040 respondents across 21 markets (3,450 are 18-24, 5,358 25-34, 8,002 35-54, 4,230 55+ years old). These include respondents answering about what would influence them to go back to the UK, and answering the more generic question about what would influence people to go back to any destination.



2. Reasons to return to the UK

Reasons to return to UK vs to a destination in general








Main differences between going back to the UK vs any destination in general

It is interesting to see that the reasons why people who had already been to the UK would go back for leisure are very different than those that would influence travellers to travel back to a destination in general. The top 5 reasons which would influence travellers to go back to the UK are split between the appeal of novelty, of discovering something new, and some more convenient aspect, such as the ease of getting there and getting around whilst in the UK.

The UK's food and drink offering, past positive interactions with locals and the way the UK caters to tourists were less commonly quoted as influences why travellers would go back to the UK, compared to results of the more general question on why travellers would go back to a destination in general.

Top 5 influences to return to the UK

- | | | |
|---|---|-----|
|  | 1. Visit a different part of the country | 45% |
|  | 2. Go back to see the sights/attractions not seen the previous time | 40% |
|  | 3. The UK is easy to get around | 34% |
|  | 4. Experience a new activity I did not do last time | 32% |
|  | 5. The UK is easy to get to for me | 31% |

Reasons to return to the UK – ranking by market

Reasons to return	ALL	AR	AU	BR	CA	CH	FR	GE	IN	IT	JA	ME	NL	PO	RU	SA	SK	SP	SE	TU	US
Visit a different part of the country	1	3	1	2	4	8	4	1	2	1	1	1	1	2	7	1	3	1	2	1	1
Go back to see the sights/attractions I didn't see the previous time	2	2	2	6	1	6	2	2	7	4	2	4	3	3	2	5	1	2	1	3	3
The country is easy to get around	3	5	3	5	2	2	3	3	1	2	6	8	5	8	4	4	7	5	5	2	4
Experience a new activity I did not do last time	4	1	5	4	5	1	6	8	3	6	5	2	6	5	5	3	2	4	3	4	2
The country is easy to get to for me	5	11	10	8	8	5	1	5	11	3	4	6	2	4	8	8	8	3	4	11	8
The country caters well to tourists	6	4	6	1	9	3	5	4	8	5	7	3	4	6	3	6	5	6	10	5	5
The local food/drink	7	12	7	3	3	7	7	10	4	8	3	7	8	9	1	7	4	9	7	12	6
Positive interactions with locals the last time I visited	8	7	8	9	6	9	8	7	5	7	11	9	7	7	6	9	11	11	6	6	7
See friends/relatives in the country	9	10	4	10	7	10	9	11	9	10	14	13	9	1	11	2	10	8	11	10	10
Go back to the same sights/attractions again	10	6	9	7	12	12	10	6	12	13	8	5	10	11	9	11	9	7	12	9	9
Go back to the same part of the country	11	8	11	11	10	13	11	9	14	11	10	14	11	12	12	13	6	10	9	7	11
Learning new skills or crafts	12	9	13	12	14	4	12	12	10	9	9	11	14	10	10	10	14	14	8	8	14
Stay in the same accommodation	13	13	12	14	11	11	14	13	13	14	12	12	13	13	14	12	13	12	13	13	12
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	14	14	13	13	14	13	14	6	12	13	10	15	14	13	14	12	13	14	14	13
Other	15	15	15	15	15	15	15	15	15	15	15	15	12	15	14	15	15	15	15	15	15

Source: IPSOS; questions about coming to the UK was not asked to Egyptian respondents, sample size for all previous visitors is 2,934 respondents, including 47 respondents for Russia (RU), 65 South Korea (SK), 69 Argentina (AR), 70 Turkey (TU), 72 Mexico (ME), 74 Japan (JA), 76 Brazil (BR), 108 USA (US), 116 Canada (CA), 131 South Africa (SA), 145 India (IN), 182 Poland (PO), 183 Germany (GE), 191 France (FR), 192 China (CH), 194 Australia (AU), 226 Spain (SP), 242 Italy (IT), 274 Sweden (SE) and 277 for Netherlands (NL)

Reasons to return to the UK – scores by market

Reasons to return	ALL	AR	AU	BR	CA	CH	FR	GE	IN	IT	JA	ME	NL	PO	RU	SA	SK	SP	SE	TU	US
Visit a different part of the country	45%	41%	45%	40%	34%	26%	41%	47%	33%	55%	42%	45%	55%	43%	21%	44%	38%	63%	44%	36%	52%
Go back to see the sights/attractions I didn't see the previous time	40%	47%	45%	28%	47%	27%	43%	42%	26%	37%	41%	34%	40%	39%	46%	32%	49%	50%	45%	32%	39%
The country is easy to get around	34%	34%	39%	31%	38%	34%	42%	41%	33%	42%	29%	25%	31%	25%	35%	32%	23%	34%	27%	34%	36%
Experience a new activity I did not do last time	32%	53%	31%	36%	27%	36%	22%	17%	31%	25%	32%	38%	27%	30%	34%	35%	46%	36%	44%	30%	40%
The country is easy to get to for me	31%	12%	17%	23%	25%	29%	50%	35%	22%	39%	32%	26%	49%	31%	21%	24%	23%	36%	36%	21%	20%
The country caters well to tourists	29%	39%	26%	43%	24%	30%	34%	40%	25%	26%	28%	38%	37%	27%	41%	29%	28%	26%	18%	30%	31%
The local food/drink	24%	9%	26%	36%	36%	27%	21%	16%	29%	20%	38%	26%	18%	21%	51%	26%	32%	16%	25%	18%	29%
Positive interactions with locals the last time I visited	22%	21%	20%	21%	25%	24%	19%	23%	28%	21%	15%	21%	19%	25%	33%	20%	16%	12%	26%	26%	26%
See friends/relatives in the country	21%	15%	31%	18%	25%	24%	16%	11%	25%	15%	9%	11%	14%	44%	11%	41%	16%	18%	14%	21%	15%
Go back to the same sights/attractions again	16%	22%	18%	23%	12%	15%	15%	26%	15%	10%	19%	30%	13%	13%	19%	13%	23%	19%	13%	24%	19%
Go back to the same part of the country	14%	20%	16%	14%	17%	13%	12%	17%	10%	12%	15%	10%	13%	9%	7%	11%	24%	14%	18%	26%	14%
Learning new skills or crafts	14%	17%	8%	14%	5%	29%	6%	8%	24%	20%	16%	12%	4%	21%	18%	15%	3%	5%	23%	25%	5%
Stay in the same accommodation	9%	6%	10%	8%	15%	17%	4%	7%	14%	9%	14%	12%	4%	7%	0%	12%	11%	9%	6%	9%	10%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	7%	3%	6%	9%	7%	12%	5%	5%	27%	10%	9%	13%	4%	5%	2%	9%	11%	5%	2%	5%	6%
Other	1%	1%	3%	0%	2%	0%	1%	1%	1%	0%	1%	2%	5%	1%	0%	0%	1%	1%	1%	1%	2%
I don't intend to go back to the United Kingdom for a holiday again	5%	3%	6%	3%	8%	0%	16%	10%	1%	4%	5%	2%	11%	4%	5%	3%	0%	2%	4%	6%	1%

Source: IPSOS; questions about coming to the UK was not asked to Egyptian respondents, sample size for all previous visitors is 2,934 respondents, including 47 respondents for Russia (RU), 65 South Korea (SK), 69 Argentina (AR), 70 Turkey (TU), 72 Mexico (ME), 74 Japan (JA), 76 Brazil (BR), 108 USA (US), 116 Canada (CA), 131 South Africa (SA), 145 India (IN), 182 Poland (PO), 183 Germany (GE), 191 France (FR), 192 China (CH), 194 Australia (AU), 226 Spain (SP), 242 Italy (IT), 274 Sweden (SE) and 277 for Netherlands (NL)

Main differences about why markets would return to the UK

- For most markets, the opportunity to **visit a different part of the UK** is the top reason to return: it is top for Australia, Germany, Italy, Japan, Mexico, Netherlands, South Africa, Spain, Turkey and USA.
- A few markets would pick '**seeing the sights/attractions they did not see the previous time**' more than other reasons to return (Canada, South Korea and Sweden), or '**experiencing a new activity they did not do last time**' (Argentina and China). In **India**, people were about as likely to have picked 'visiting a different part of the UK' as well as the ease to get around.
- Compared to the reasons why people go back to a destination in general, **discovering something new** features higher for reasons to return to the UK, over some more practical aspects.
- The UK's **food and drink** offering is also less of a draw for a second visit in general: although Russians choose it as the top reason to return, and Brazilians, Canadians, Japanese and South Koreans place it among their top influencing factors, it only ranks 7th across all markets on average.
- People's **connections with the country** are a key draw for a few markets: about 2-in-5 previous visitors to the UK from Poland or South Korea would be motivated to return by seeing their friends or relatives in the UK, and about 3-in-10 from Australia. 1-in-3 Russian previous visitors also would come back for positive interactions they had with locals the last time they visited.
- **Chinese** respondents are more likely than other markets to say that learning a new skill or craft is a reason to return to the UK for a holiday; this ranks 4th most influencing factor for them vs 12th across all markets, with 29% picking this reason vs 14% on average across all previous visitors.
- 27% of Indians would also be influenced by the UK's **accessible facilities** for people with special needs, which over indexes on the all-market average.

Reasons to return to the UK by demographics

Reasons to return	ALL	Men	Women	18-24	25-34	35-54	55+
Visit a different part of the country	45%	41%	49%	40%	36%	46%	54%
Go back to see the sights/attractions I didn't see the previous time	40%	37%	42%	36%	30%	42%	48%
The country is easy to get around	34%	34%	33%	26%	33%	36%	35%
Experience a new activity I did not do last time	32%	30%	34%	33%	30%	34%	32%
The country is easy to get to for me	31%	32%	31%	29%	28%	34%	31%
The country caters well to tourists	29%	30%	29%	29%	28%	30%	29%
The local food/drink	24%	25%	23%	27%	26%	25%	18%
Positive interactions with locals the last time I visited	22%	21%	22%	28%	24%	19%	20%
See friends/relatives in the country	21%	21%	20%	24%	22%	19%	20%
Go back to the same sights/attractions again	16%	17%	16%	17%	16%	18%	14%
Go back to the same part of the country	14%	13%	15%	15%	14%	15%	12%
Learning new skills or crafts	14%	14%	14%	22%	18%	12%	8%
Stay in the same accommodation	9%	10%	8%	12%	12%	9%	5%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	7%	8%	7%	8%	10%	7%	5%
Other	1%	1%	2%	0%	1%	1%	3%
I don't intend to go back to the United Kingdom for a holiday again	5%	5%	5%	4%	2%	5%	8%

- There is little difference in what would influence women and men to holiday again in the UK. Women over index on wanting to visit a different part of the country, seeing new sights/ attractions, or experiencing a new activity.
- Just as for any destination, the 18-24 cohort is most likely to come back to the UK for a holiday for its local food and drink offer, positive interactions they had with locals and learning new skills. However, they are less swayed by the country being easy to get around. Answers could be influenced by the previous visits of this group likely to have been more recent.
- The older age group over indexes on returning to visit another part of the UK or other sights/attractions.



3. Details of reasons to return by market

Reasons to return: Argentina (AR)

Reasons to return	Overall AR ranking	AR to UK	AR to generic destination	Global overall ranking	Global to UK	Global to generic destination
Go back to see the sights/attractions I didn't see the previous time	1	47%	50%	2	40%	40%
Visit a different part of the country	2	41%	44%	3	45%	39%
Experience a new activity I did not do last time	3	53%	42%	7	32%	35%
The local food/drink	4	9%	42%	1	24%	45%
The country caters well to tourists	5	39%	34%	4	29%	39%
The country is easy to get around	6	34%	32%	5	34%	38%
The country is easy to get to for me	7	12%	28%	6	31%	35%
See friends/relatives in the country	8	15%	28%	9	21%	26%
Positive interactions with locals the last time I visited	9	21%	26%	8	22%	32%
Go back to the same part of the country	10	20%	22%	12	14%	14%
Go back to the same sights/attractions again	11	22%	19%	11	16%	16%
Learning new skills or crafts	12	17%	17%	10	14%	19%
Stay in the same accommodation	13	6%	11%	13	9%	12%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	3%	5%	14	7%	9%
Other	15	1%	1%	15	1%	2%

- Overall, people from Argentina would value novelty when choosing to go back to a country for a holiday. 1-in-2 respondents said they would go back to see the sights/attractions they did not see the previous time, whilst a similar share of those who had been to the UK before would go there again to experience a new activity they did not the last time they visited, much more than the average previous inbound visitors. They were also more likely to go back to the UK as it caters well to tourists.
- However, only 1-in-10 previous visitors from Argentina would go back to the UK for its local food and drink, a much lower propensity than across previous visitors from all inbound markets.

Reasons to return: Australia (AU)

Reasons to return	Overall AU ranking	AU to UK	AU to generic destination	Global overall ranking	Global to UK	Global to generic destination
Go back to see the sights/attractions I didn't see the previous time	1	45%	44%	2	40%	40%
Visit a different part of the country	2	45%	42%	3	45%	39%
The country is easy to get around	3	39%	43%	5	34%	38%
The local food/drink	4	26%	41%	1	24%	45%
Experience a new activity I did not do last time	5	31%	37%	7	32%	35%
The country is easy to get to for me	6	17%	38%	6	31%	35%
Positive interactions with locals the last time I visited	7	20%	35%	8	22%	32%
See friends/relatives in the country	8	31%	30%	9	21%	26%
The country caters well to tourists	9	26%	30%	4	29%	39%
Go back to the same part of the country	10	16%	14%	12	14%	14%
Go back to the same sights/attractions again	11	18%	13%	11	16%	16%
Stay in the same accommodation	12	10%	12%	13	9%	12%
Learning new skills or crafts	13	8%	12%	10	14%	19%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	6%	8%	14	7%	9%
Other	15	3%	3%	15	1%	2%

- As with other long-haul English-speaking markets, Australians are less influenced by the fact that a country caters well to tourists than the all market average. Otherwise, the ranking of influences why Australians would go back to a destination is quite similar to why people would go back to holiday somewhere on average.
- In this market, the main discrepancy between why people would go to any destination versus why they would holiday in the UK again is the ease to get to the destination: the UK is about 24 hours away from Australia so this is no surprise. Despite speaking the language, Australians are also less likely to go back to the UK for ease to get around than they would be influenced by that to go back to any destination.

Reasons to return: Brazil (BR)

Reasons to return	Overall BR ranking	BR to UK	BR to generic destination	Global overall ranking	Global to UK	Global to generic destination
The country caters well to tourists	1	43%	48%	4	29%	39%
Visit a different part of the country	2	40%	43%	3	45%	39%
The local food/drink	3	36%	42%	1	24%	45%
Experience a new activity I did not do last time	4	36%	40%	7	32%	35%
The country is easy to get around	5	31%	39%	5	34%	38%
The country is easy to get to for me	6	23%	35%	6	31%	35%
Go back to see the sights/attractions I didn't see the previous time	7	28%	32%	2	40%	40%
Positive interactions with locals the last time I visited	8	21%	29%	8	22%	32%
See friends/relatives in the country	9	18%	27%	9	21%	26%
Learning new skills or crafts	10	14%	19%	10	14%	19%
Go back to the same sights/attractions again	11	23%	12%	11	16%	16%
Stay in the same accommodation	12	8%	12%	13	9%	12%
Go back to the same part of the country	13	14%	10%	12	14%	14%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	9%	10%	14	7%	9%
Other	15	0%	1%	15	1%	2%

- The top 7 influences pushing Brazilians to go back to a holiday destination overall is broadly the same as the all inbound markets' top 7, however in a different order. For example, they rank higher the fact that the destination country caters well to tourists (1st vs 4th respectively), and that they can experience a new activity there (4th vs 7th).
- Most likely reasons why Brazilians would go back to any destination or to the UK in particular are also quite similar. Even 'local food and drink' rank third for both the UK and any destinations. However, the ease of getting to the UK is less of a reason why they would come back their on holidays than to any destinations (23% vs 35% respectively)
- Brazilians are also more likely to be drawn to the UK to go back to the same sights and attractions than to any destination (23% vs 12%).

Reasons to return: Canada (CA)

Reasons to return	Overall CA ranking	CA to UK	CA to generic destination	Global overall ranking	Global to UK	Global to generic destination
The country is easy to get around	1	38%	42%	5	34%	38%
The local food/drink	2	36%	42%	1	24%	45%
Go back to see the sights/attractions I didn't see the previous time	3	47%	40%	2	40%	40%
Visit a different part of the country	4	34%	36%	3	45%	39%
The country is easy to get to for me	5	25%	36%	6	31%	35%
Positive interactions with locals the last time I visited	6	25%	35%	8	22%	32%
The country caters well to tourists	7	24%	32%	4	29%	39%
See friends/relatives in the country	8	25%	31%	9	21%	26%
Experience a new activity I did not do last time	9	27%	30%	7	32%	35%
Go back to the same sights/attractions again	10	12%	19%	11	16%	16%
Go back to the same part of the country	11	17%	18%	12	14%	14%
Stay in the same accommodation	12	15%	17%	13	9%	12%
Learning new skills or crafts	13	5%	12%	10	14%	19%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	7%	8%	14	7%	9%
Other	15	2%	3%	15	1%	2%

- As for Australian and US respondents, Canadians are less influenced by a country catering well to tourists than the all-market average overall when it comes to choose to go back to a country they already went to.
- For them the top three reasons why they would return on a holiday to any country are the same as the top three reasons to return to the UK. The latter would be topped by going back to see sights/attractions that they did not see the previous time though.
- Canadians are less likely than the average previous inbound visitor to go back on a holiday to the UK for visiting a different part of the country, the possibility to experience a new activity or learn a new skill or craft. They are more likely to value British food and drinks though.

Reasons to return: China (CH)

Reasons to return	Overall CH ranking	CH to UK	CH to generic destination	Global overall ranking	Global to UK	Global to generic destination
The local food/drink	1	27%	51%	1	24%	45%
Experience a new activity I did not do last time	2	36%	43%	7	32%	35%
The country caters well to tourists	3	30%	43%	4	29%	39%
The country is easy to get around	4	34%	39%	5	34%	38%
The country is easy to get to for me	5	29%	39%	6	31%	35%
Go back to see the sights/attractions I didn't see the previous time	6	27%	36%	2	40%	40%
Visit a different part of the country	7	26%	29%	3	45%	39%
Learning new skills or crafts	8	29%	25%	10	14%	19%
Positive interactions with locals the last time I visited	9	24%	24%	8	22%	32%
See friends/relatives in the country	10	24%	24%	9	21%	26%
Go back to the same sights/attractions again	11	15%	14%	11	16%	16%
Stay in the same accommodation	12	17%	12%	13	9%	12%
Go back to the same part of the country	13	13%	11%	12	14%	14%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	12%	9%	14	7%	9%
Other	15	0%	1%	15	1%	2%

- As for the all-market average, the local food and drink is the number one reason why Chinese people would go back to a holiday destination overall. However, they over index on being motivated by experiencing a new activity they did not do the last time.
- Looking at reasons why Chinese previous visitors would go back to the UK, only about a quarter quote food and drink as a reason. But, over a third would do so because the UK is easy to get around or because they want to experience a new activity there.
- Chinese previous visitors also over index in willingness to come back for learning a new skill or craft and to stay in the same accommodation.

Reasons to return: France (FR)

Reasons to return	Overall FR ranking	FR to UK	FR to generic destination	Global overall ranking	Global to UK	Global to generic destination
Visit a different part of the country	1	41%	54%	3	45%	39%
The local food/drink	2	21%	55%	1	24%	45%
Go back to see the sights/attractions I didn't see the previous time	3	43%	41%	2	40%	40%
The country caters well to tourists	4	34%	42%	4	29%	39%
The country is easy to get to for me	5	50%	38%	6	31%	35%
The country is easy to get around	6	42%	34%	5	34%	38%
Positive interactions with locals the last time I visited	7	19%	31%	8	22%	32%
Experience a new activity I did not do last time	8	22%	25%	7	32%	35%
See friends/relatives in the country	9	16%	25%	9	21%	26%
Go back to the same part of the country	10	12%	15%	12	14%	14%
Go back to the same sights/attractions again	11	15%	13%	11	16%	16%
Learning new skills or crafts	12	6%	11%	10	14%	19%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	13	5%	8%	14	7%	9%
Stay in the same accommodation	14	4%	7%	13	9%	12%
Other	15	1%	2%	15	1%	2%

- Overall, the French top ranking reasons to return to a country for holiday are very similar to the global ranking.
- Looking at why they would go back to the UK though, its proximity, so ease of access, is a clear top influence, and it also over indexes on its importance for French people to go back to any destination. The French also value the possibility to see new or the same sights/attractions, and the ease to get around the UK. All other reasons seem to have less influence for the French to go back to the UK than to go back to a generic destination for a holiday.
- Usually, visiting a different part of the country, the local food/drink, and to an extent seeing new sights/attractions, or the fact that the country caters well to tourists are more influencing reasons why French people would go back to any destination than the all-market average would. French previous visitors are also more likely than for the all-market average to go back to the UK because it caters well to tourists.

Reasons to return: Germany (DE)

Reasons to return	Overall DE ranking	DE to UK	DE to generic destination	Global overall ranking	Global to UK	Global to generic destination
The country is easy to get around	1	41%	45%	5	34%	38%
The country is easy to get to for me	2	35%	43%	6	31%	35%
The local food/drink	3	16%	45%	1	24%	45%
Go back to see the sights/attractions I didn't see the previous time	4	42%	37%	2	40%	40%
Visit a different part of the country	5	47%	34%	3	45%	39%
Positive interactions with locals the last time I visited	6	23%	37%	8	22%	32%
The country caters well to tourists	7	40%	27%	4	29%	39%
See friends/relatives in the country	8	11%	26%	9	21%	26%
Experience a new activity I did not do last time	9	17%	22%	7	32%	35%
Go back to the same part of the country	10	17%	22%	12	14%	14%
Go back to the same sights/attractions again	11	26%	19%	11	16%	16%
Stay in the same accommodation	12	7%	18%	13	9%	12%
Learning new skills or crafts	13	8%	13%	10	14%	19%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	5%	10%	14	7%	9%
Other	15	1%	4%	15	1%	2%

- Germans tend to be more influenced to go back to a country for a holiday by practical aspects overall: ease of getting around and to access the destination for them.
- But, they are keener on coming back to the UK to explore a different part of it than other previous visitors. It is the first reason why they would go back to the UK. Local food and drink, on the other end, is clearly less influential. Like the French, Germans who have been to the UK before would be more likely to come back because they want to go back to the same sights/ attractions than average previous visitors.
- They also over index on coming back because the UK caters well to tourists compare to the all-market average, and would think of returning to the UK for that more than to any destination. They are much less likely to keep coming back to the UK for visiting friends or relatives though (only 1 in 10 previous visitors). Positive interactions with locals are also an important influence to return to the UK.

Reasons to return: India (IN)

Reasons to return	Overall IN ranking	IN to UK	IN to generic destination	Global overall ranking	Global to UK	Global to generic destination
Visit a different part of the country	1	33%	36%	3	45%	39%
Experience a new activity I did not do last time	2	31%	33%	7	32%	35%
The country is easy to get around	3	33%	32%	5	34%	38%
The local food/drink	4	29%	32%	1	24%	45%
See friends/relatives in the country	5	25%	32%	9	21%	26%
Positive interactions with locals the last time I visited	6	28%	31%	8	22%	32%
The country caters well to tourists	7	25%	31%	4	29%	39%
Go back to see the sights/attractions I didn't see the previous time	8	26%	30%	2	40%	40%
Learning new skills or crafts	9	24%	29%	10	14%	19%
The country is easy to get to for me	10	22%	28%	6	31%	35%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	11	27%	24%	14	7%	9%
Go back to the same sights/attractions again	12	15%	22%	11	16%	16%
Stay in the same accommodation	13	14%	20%	13	9%	12%
Go back to the same part of the country	14	10%	19%	12	14%	14%
Other	15	1%	1%	15	1%	2%

- Overall, exploring seems a key influencing factor for Indians to come back to a holiday destination: visiting a different part of the country, undertaking a new activity (5 ranks above the all-market ranking) and ease of getting around. Influencing factors to go back to the UK are also very similar to the overall top reasons.
- Returning to the UK visit friends or relatives there is more influential in India than across all markets. However, Indians value novelty more than others: going back to same sights/attractions, the same part of the country or staying in the same accommodation rank the lowest for them.
- Indians also over index on local food and drink options in the UK as well as perceptions of their interactions with British locals. Learning new skills/craft is also more appealing to Indians than other travellers.

Reasons to return: Italy (IT)

Reasons to return	Overall IT ranking	IT to UK	IT to generic destination	Global overall ranking	Global to UK	Global to generic destination
Visit a different part of the country	1	55%	48%	3	45%	39%
The country is easy to get around	2	42%	48%	5	34%	38%
The country caters well to tourists	3	26%	47%	4	29%	39%
The local food/drink	4	20%	45%	1	24%	45%
The country is easy to get to for me	5	39%	39%	6	31%	35%
Go back to see the sights/attractions I didn't see the previous time	6	37%	37%	2	40%	40%
Positive interactions with locals the last time I visited	7	21%	32%	8	22%	32%
Experience a new activity I did not do last time	8	25%	24%	7	32%	35%
See friends/relatives in the country	9	15%	20%	9	21%	26%
Learning new skills or crafts	10	20%	18%	10	14%	19%
Stay in the same accommodation	11	9%	12%	13	9%	12%
Go back to the same part of the country	12	12%	10%	12	14%	14%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	13	10%	10%	14	7%	9%
Go back to the same sights/attractions again	14	10%	9%	11	16%	16%
Other	15	0%	2%	15	1%	2%

- Seeing new sights/attractions and the local food/drinks hold slightly less influence on Italian travellers overall when they decide to come back to a destination they already visited (ranking 4th and 6th, 3 and 4 ranks lower than the all-market average overall, respectively).
- Visiting a different part of the country and the ease of getting around are key factors for Italian tourists when choosing to go back to the UK or any destination, topping both rankings. Perceptions of how well the UK caters to tourists and the British food and drink offering are less important when it comes to coming to the UK though (26% and 20% vs 47% and 45% across all inbound markets on average respectively).

Reasons to return: Japan (JA)

Reasons to return	Overall JA ranking	JA to UK	JA to generic destination	Global overall ranking	Global to UK	Global to generic destination
The local food/drink	1	38%	73%	1	24%	45%
The country caters well to tourists	2	28%	59%	4	29%	39%
The country is easy to get to for me	3	32%	55%	6	31%	35%
The country is easy to get around	4	29%	48%	5	34%	38%
Go back to see the sights/attractions I didn't see the previous time	5	41%	39%	2	40%	40%
Visit a different part of the country	6	42%	29%	3	45%	39%
Experience a new activity I did not do last time	7	32%	23%	7	32%	35%
Positive interactions with locals the last time I visited	8	15%	14%	8	22%	32%
Go back to the same part of the country	9	15%	11%	12	14%	14%
Stay in the same accommodation	10	14%	11%	13	9%	12%
See friends/relatives in the country	11	9%	11%	9	21%	26%
Go back to the same sights/attractions again	12	19%	10%	11	16%	16%
Learning new skills or crafts	13	16%	10%	10	14%	19%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	9%	5%	14	7%	9%
Other	15	1%	3%	15	1%	2%

- Overall, practical aspects seem to be more important for people in Japan: local food/drink, the fact that the country caters well to tourists, easy to get to or to get around rank highly, and by a large margin in terms of what influence Japanese to go back to a destination overall. Despite ranking in the lower half of the top influences ranking, going back to the same part of the country or the same accommodation still rank higher than the overall average ranking: 9th and 10th for Japanese respondents, no matter the destination type vs 12th and 13th for all inbound respondents respectively.
- However, making new discoveries is more important for them in terms what may make them go back to the UK: visiting a different part of the UK or going to see new sights/attractions come first in that list.

Reasons to return: Mexico (ME)

Reasons to return	Overall ME ranking	ME to UK	ME to generic destination	Global overall ranking	Global to UK	Global to generic destination
The local food/drink	1	26%	53%	1	24%	45%
Visit a different part of the country	2	45%	43%	3	45%	39%
Experience a new activity I did not do last time	3	38%	42%	7	32%	35%
The country caters well to tourists	4	38%	42%	4	29%	39%
Go back to see the sights/attractions I didn't see the previous time	5	34%	42%	2	40%	40%
Positive interactions with locals the last time I visited	6	21%	30%	8	22%	32%
The country is easy to get around	7	25%	28%	5	34%	38%
See friends/relatives in the country	8	11%	29%	9	21%	26%
Learning new skills or crafts	9	12%	25%	10	14%	19%
The country is easy to get to for me	10	26%	17%	6	31%	35%
Go back to the same sights/attractions again	11	30%	16%	11	16%	16%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	12	13%	13%	14	7%	9%
Go back to the same part of the country	13	10%	11%	12	14%	14%
Stay in the same accommodation	14	12%	10%	13	9%	12%
Other	15	2%	0%	15	1%	2%

- Those are the top 4 reasons why Mexicans would go back somewhere for a holiday overall, with the latter over indexing on the all-market ranking (3rd vs 7th respectively. Some practical aspects such as ease of access clearly are of less influence for Mexicans: it ranks 10th for them vs 6th across all markets.
- Looking at the differences between reasons why Mexicans would return to the UK vs any destinations, they are half less likely to go back to the UK for its food and drink offering than they are for any destinations. So aspects like visiting a new part of the country or doing a new activity, and catering well to tourists are more important when it comes to choose to go to the UK again.

Reasons to return: Netherlands (NL)

Reasons to return	Overall NL ranking	NL to UK	NL to generic destination	Global overall ranking	Global to UK	Global to generic destination
Visit a different part of the country	1	55%	50%	3	45%	39%
The country is easy to get to for me	2	49%	41%	6	31%	35%
Go back to see the sights/attractions I didn't see the previous time	3	40%	42%	2	40%	40%
The local food/drink	4	18%	50%	1	24%	45%
The country caters well to tourists	5	37%	36%	4	29%	39%
Experience a new activity I did not do last time	6	27%	33%	7	32%	35%
The country is easy to get around	7	31%	28%	5	34%	38%
Positive interactions with locals the last time I visited	8	19%	28%	8	22%	32%
See friends/relatives in the country	9	14%	25%	9	21%	26%
Stay in the same accommodation	10	4%	18%	13	9%	12%
Go back to the same part of the country	11	13%	14%	12	14%	14%
Go back to the same sights/attractions again	12	13%	11%	11	16%	16%
Learning new skills or crafts	13	4%	11%	10	14%	19%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	4%	8%	14	7%	9%
Other	15	5%	5%	15	1%	2%

- When thinking about returning to a holiday destination, Dutch respondents value going back to visit a different part of the country during their holidays. This ranks top for both returning to the UK and to any destinations.
- However, the ease of getting around is of less influence compared to the all-market overall ranking, 7th vs 5th respectively.
- There are some discrepancies between what might influence the Dutch to go back to the UK vs any destinations though. Local food and drink is more important when considering to return to a generic destination, ranking equal 1st. About 1-in-2 Dutch respondents who had been to the UK before would go back because of ease of access from the Netherlands. Dutch previous visitors are also less likely to return to the UK to learn new skills than the all-market average.

Reasons to return: Poland (PO)

Reasons to return	Overall PO ranking	PO to UK	PO to generic destination	Global overall ranking	Global to UK	Global to generic destination
The country caters well to tourists	1	27%	49%	4	29%	39%
Visit a different part of the country	2	43%	39%	3	45%	39%
Go back to see the sights/attractions I didn't see the previous time	3	39%	38%	2	40%	40%
The local food/drink	4	21%	40%	1	24%	45%
Experience a new activity I did not do last time	5	30%	38%	7	32%	35%
Positive interactions with locals the last time I visited	6	25%	36%	8	22%	32%
The country is easy to get to for me	7	31%	34%	6	31%	35%
The country is easy to get around	8	25%	34%	5	34%	38%
See friends/relatives in the country	9	44%	25%	9	21%	26%
Learning new skills or crafts	10	21%	19%	10	14%	19%
Go back to the same sights/attractions again	11	13%	14%	11	16%	16%
Go back to the same part of the country	12	9%	12%	12	14%	14%
Stay in the same accommodation	13	7%	12%	13	9%	12%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	5%	10%	14	7%	9%
Other	15	1%	1%	15	1%	2%

- There are some similarities between the all-market average overall ranking and the Polish one: the top 4 reasons to return are the same, just in a different order, and so are reasons ranking 5th to 8th. They would be most likely to consider coming back to a country that caters well to tourists.
- Polish respondents over-indexed on this particular reason to return to any destination compared to the all-market average (49% vs 39% respectively).
- This is less true when they consider whether to holiday again in the UK though; visiting a different part of the country, seeing sights/attractions they did not see the previous time, or even experiencing a new activity would be more important. But the top reason why they would go back to the UK is to see friends and relatives there.

Reasons to return: Russia (RU)

Reasons to return	Overall RU ranking	RU to UK	RU to generic destination	Global overall ranking	Global to UK	Global to generic destination
The country caters well to tourists	1	41%	53%	4	29%	39%
The country is easy to get around	2	35%	47%	5	34%	38%
Go back to see the sights/attractions I didn't see the previous time	3	46%	45%	2	40%	40%
The local food/drink	4	51%	42%	1	24%	45%
Positive interactions with locals the last time I visited	5	33%	43%	8	22%	32%
The country is easy to get to for me	6	21%	36%	6	31%	35%
Visit a different part of the country	7	21%	30%	3	45%	39%
Experience a new activity I did not do last time	8	34%	24%	7	32%	35%
Go back to the same sights/attractions again	9	19%	21%	11	16%	16%
See friends/relatives in the country	10	11%	21%	9	21%	26%
Learning new skills or crafts	11	18%	14%	10	14%	19%
Stay in the same accommodation	12	0%	10%	13	9%	12%
Go back to the same part of the country	13	7%	9%	12	14%	14%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	2%	5%	14	7%	9%
Other	15	0%	1%	15	1%	2%

- Overall, Russians value a destination that caters well to tourists and is easy to get around. Those are the two most important reasons why Russians would return to a country for a holiday overall. However, half of those who previously went to the UK would go back there for the British food and drink offer, which over-indexes by a large margin on the all-market average. They would also consider that the UK caters well to tourists more of an influence than the average global traveller (41% vs 29% respectively).
- However, visiting a different part of the country is a less popular reason to return to a holiday destination overall for Russians than for the all-market average, ranking 7th for the former vs 3rd for all markets.

Reasons to return: South Africa (SA)

Reasons to return	Overall SA ranking	SA to UK	SA to generic destination	Global overall ranking	Global to UK	Global to generic destination
Experience a new activity I did not do last time	1	35%	40%	7	32%	35%
Visit a different part of the country	2	44%	38%	3	45%	39%
The local food/drink	3	26%	40%	1	24%	45%
Positive interactions with locals the last time I visited	4	20%	39%	8	22%	32%
The country caters well to tourists	5	29%	38%	4	29%	39%
The country is easy to get around	6	32%	36%	5	34%	38%
Go back to see the sights/attractions I didn't see the previous time	7	32%	35%	2	40%	40%
See friends/relatives in the country	8	41%	33%	9	21%	26%
Learning new skills or crafts	9	15%	29%	10	14%	19%
The country is easy to get to for me	10	24%	27%	6	31%	35%
Stay in the same accommodation	11	12%	12%	13	9%	12%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	12	9%	12%	14	7%	9%
Go back to the same part of the country	13	11%	11%	12	14%	14%
Go back to the same sights/attractions again	14	13%	10%	11	16%	16%
Other	15	0%	2%	15	1%	2%

- South African respondents' profile of reasons to return to a destination for a holiday overall is quite different to the overall ranking. Experiencing a new activity they did not do last time ranks first among South Africans, whilst it only comes in the 7th place across all markets. South Africans also value more positive interactions with locals than average: it ranks 4th overall for them, but 8th across all inbound markets.
- This is less true when it comes to reasons why South African previous visitors though. The most probable reason why they would go back to the UK is to visit a different part of the country, followed by seeing friends or relatives there – with over 2 in 5 picking each of those reasons to return.

Reasons to return: South Korea (SK)

Reasons to return	Overall SK ranking	SK to UK	SK to generic destination	Global overall ranking	Global to UK	Global to generic destination
The local food/drink	1	32%	59%	1	24%	45%
Go back to see the sights/attractions I didn't see the previous time	2	49%	55%	2	40%	40%
Experience a new activity I did not do last time	3	46%	49%	7	32%	35%
The country is easy to get to for me	4	23%	49%	6	31%	35%
The country is easy to get around	5	23%	39%	5	34%	38%
The country caters well to tourists	6	28%	33%	4	29%	39%
Visit a different part of the country	7	38%	30%	3	45%	39%
Positive interactions with locals the last time I visited	8	16%	23%	8	22%	32%
Go back to the same sights/attractions again	9	23%	17%	11	16%	16%
See friends/relatives in the country	10	16%	16%	9	21%	26%
Go back to the same part of the country	11	24%	9%	12	14%	14%
Stay in the same accommodation	12	11%	10%	13	9%	12%
Learning new skills or crafts	13	3%	6%	10	14%	19%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	11%	4%	14	7%	9%
Other	15	1%	1%	15	1%	2%

- Like most markets, the local food and drink, as well as seeing sights and attractions they did not see the previous time are key influencing factors for South Koreans when looking at returning to a destination for holidays. However, those are followed by the opportunity to experience a new activity, or how easy it is to get to that country for them, which usually rank lower across most markets.
- Reasons why people from South Korea would go back to any destinations are very similar to that overall ranking. However, novelty comprises the top 3 reasons why South Koreans would go back to the UK: seeing new sights/ attractions, experiencing a new activity, and visiting a new part of the UK.

Reasons to return: Spain (SP)

Reasons to return	Overall SP ranking	SP to UK	SP to generic destination	Global overall ranking	Global to UK	Global to generic destination
Visit a different part of the country	1	63%	55%	3	45%	39%
Go back to see the sights/attractions I didn't see the previous time	2	50%	43%	2	40%	40%
The local food/drink	3	16%	48%	1	24%	45%
The country caters well to tourists	4	26%	44%	4	29%	39%
The country is easy to get around	5	34%	39%	5	34%	38%
The country is easy to get to for me	6	36%	33%	6	31%	35%
Experience a new activity I did not do last time	7	36%	32%	7	32%	35%
See friends/relatives in the country	8	18%	26%	9	21%	26%
Positive interactions with locals the last time I visited	9	12%	24%	8	22%	32%
Go back to the same sights/attractions again	10	19%	13%	11	16%	16%
Go back to the same part of the country	11	14%	13%	12	14%	14%
Learning new skills or crafts	12	5%	14%	10	14%	19%
Stay in the same accommodation	13	9%	11%	13	9%	12%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	5%	6%	14	7%	9%
Other	15	1%	2%	15	1%	2%

- Spaniards' overall motivations to return to a country for holiday are broadly on par with the all-market average.
- There are two clear reasons why Spanish travellers who have been to the UK would go back there: 50% would go back to see the sights and attractions they did not the previous time, whilst 63% would go back to visit a different part of the country. Both over-index compared to the propensity to pick those reasons to return to any destinations for Spaniards, or compared to the all-market average for previous visitors.
- However, Spanish previous visitors are only a third as likely to go back to the UK for its food and drink offering as they would to any destinations.

Reasons to return: Sweden (SE)

Reasons to return	Overall SE ranking	SE to UK	SE to generic destination	Global overall ranking	Global to UK	Global to generic destination
Experience a new activity I did not do last time	1	44%	45%	7	32%	35%
The local food/drink	2	25%	48%	1	24%	45%
Go back to see the sights/attractions I didn't see the previous time	3	45%	40%	2	40%	40%
Visit a different part of the country	4	44%	37%	3	45%	39%
The country is easy to get to for me	5	36%	39%	6	31%	35%
Positive interactions with locals the last time I visited	6	26%	38%	8	22%	32%
The country is easy to get around	7	27%	30%	5	34%	38%
Learning new skills or crafts	8	23%	28%	10	14%	19%
See friends/relatives in the country	9	14%	27%	9	21%	26%
The country caters well to tourists	10	18%	19%	4	29%	39%
Go back to the same part of the country	11	18%	19%	12	14%	14%
Stay in the same accommodation	12	6%	14%	13	9%	12%
Go back to the same sights/attractions again	13	13%	10%	11	16%	16%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	2%	6%	14	7%	9%
Other	15	1%	1%	15	1%	2%

- Overall, experiencing a new activity compared to their last visit is the most common factor influencing Swedish travellers to go back to a country for holiday overall.
- However, the top reason selected for any destination is the local food and drink, whilst there is a very close top 3 for returning to the UK. 45% of the Swedish respondents who had been to the UK for a holiday before would go back to see sights and attractions they did not see the previous time; 44% would to experience a new activity or to visit a different part of the country.
- Thus, novelty tops the ranking overall and for returning to the UK. Swedish people are less likely than the all-market average to be influenced by a country catering well to tourists when choosing to come back for a holiday.

Reasons to return: Turkey (TU)

Reasons to return	Overall TU ranking	TU to UK	TU to generic destination	Global overall ranking	Global to UK	Global to generic destination
The country caters well to tourists	1	30%	42%	4	29%	39%
Go back to see the sights/attractions I didn't see the previous time	2	32%	40%	2	40%	40%
The local food/drink	3	18%	40%	1	24%	45%
The country is easy to get around	4	34%	35%	5	34%	38%
Positive interactions with locals the last time I visited	5	26%	35%	8	22%	32%
Visit a different part of the country	6	36%	32%	3	45%	39%
Experience a new activity I did not do last time	7	30%	31%	7	32%	35%
Learning new skills or crafts	8	25%	31%	10	14%	19%
The country is easy to get to for me	9	21%	28%	6	31%	35%
See friends/relatives in the country	10	21%	26%	9	21%	26%
Go back to the same sights/attractions again	11	24%	25%	11	16%	16%
Go back to the same part of the country	12	26%	13%	12	14%	14%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	13	5%	12%	14	7%	9%
Stay in the same accommodation	14	9%	9%	13	9%	12%
Other	15	1%	2%	15	1%	2%

- Overall, perceptions of welcome seems to be the main reason why Turkish people would go back to a country on a holiday overall, with some other practical elements (ease of getting around, local food and drink) and new sights and attractions also in their top 5. The fact that a country caters well to tourists comes first overall though, whilst it is 4th across all inbound market, and past positive interactions with locals also make it to the top 5, whilst only 8th for the inbound average ranking.
- Reasons why they would go back to the UK differ slightly though: exploring more seems to be key. The main reason why previous Turkish holidaymakers would go back to the UK is to visit a different part of the country. This is followed by around a third of the previous visitors from Turkey quoting ease of getting around or seeing new sights and attractions.

Reasons to return: USA (US)

Reasons to return	Overall US ranking	US to UK	US to generic destination	Global overall ranking	Global to UK	Global to generic destination
The local food/drink	1	29%	45%	1	24%	45%
Go back to see the sights/attractions I didn't see the previous time	2	39%	40%	2	40%	40%
The country is easy to get around	3	36%	39%	5	34%	38%
Visit a different part of the country	4	52%	36%	3	45%	39%
Experience a new activity I did not do last time	5	40%	35%	7	32%	35%
The country is easy to get to for me	6	20%	35%	6	31%	35%
Positive interactions with locals the last time I visited	7	26%	34%	8	22%	32%
The country caters well to tourists	8	31%	31%	4	29%	39%
See friends/relatives in the country	9	15%	29%	9	21%	26%
Go back to the same sights/attractions again	10	19%	17%	11	16%	16%
Learning new skills or crafts	11	5%	18%	10	14%	19%
Stay in the same accommodation	12	10%	14%	13	9%	12%
Go back to the same part of the country	13	14%	13%	12	14%	14%
Accessible facilities for people with special needs (e.g. disabled or elderly people, children with strollers)	14	6%	10%	14	7%	9%
Other	15	2%	6%	15	1%	2%

- As for other long-haul English-speaking markets, the fact that a country is perceived to cater well to tourists is less influencing for US respondents than the all-market average, ranking 4th in the all-market overall ranking but 8th in the US.
- Overall, and when it comes about thinking to come back to any destinations, the local food and drink, new sights or attractions, and the ease of getting around are the top three reasons to return to a country for holiday for US respondents.
- However, if we only consider those who have been to the UK before, half would be influenced to go back to visit a different part of the country. This is followed by about 2-in-5 willing to return to experience a new activity or see new sights and attractions.