



Researching and Planning a holiday

What will we cover within 'Holiday Research & Planning' section?

This section focusses on information around the holiday research and planning phase. We will cover the following questions:

1. Who does what across the different holiday planning phases?

a. Who is likely to be involved at each stage of the holiday planning process?

Overall breakdown by each planning stage; differences by different demographics and market clusters

2. Why visit Britain or other holiday destinations?

a. What are the key motivators for travellers to select a holiday destination/Britain?

Top influencers; differences by market clusters and demographics if applicable

3. What are the key information sources when deciding a holiday to Britain?

a. What online sources most influence choice of holiday destination?

Top online influencers; differences by markets if applicable

b. What other sources influence travellers' choice of holiday destination?

Top offline influencers; differences by markets if applicable

4. When did people plan and book their holiday to Britain?

a. How far in advance do people start thinking, decide on their destination and look at price options for their holiday?

Overall breakdown of each planning stage vs. months in advance of holiday; differences by markets/clusters if applicable

b. When do people book their holiday to Britain?

Overall breakdown of stage vs. months in advance of holiday; differences by markets/clusters

#1 SUMMARY



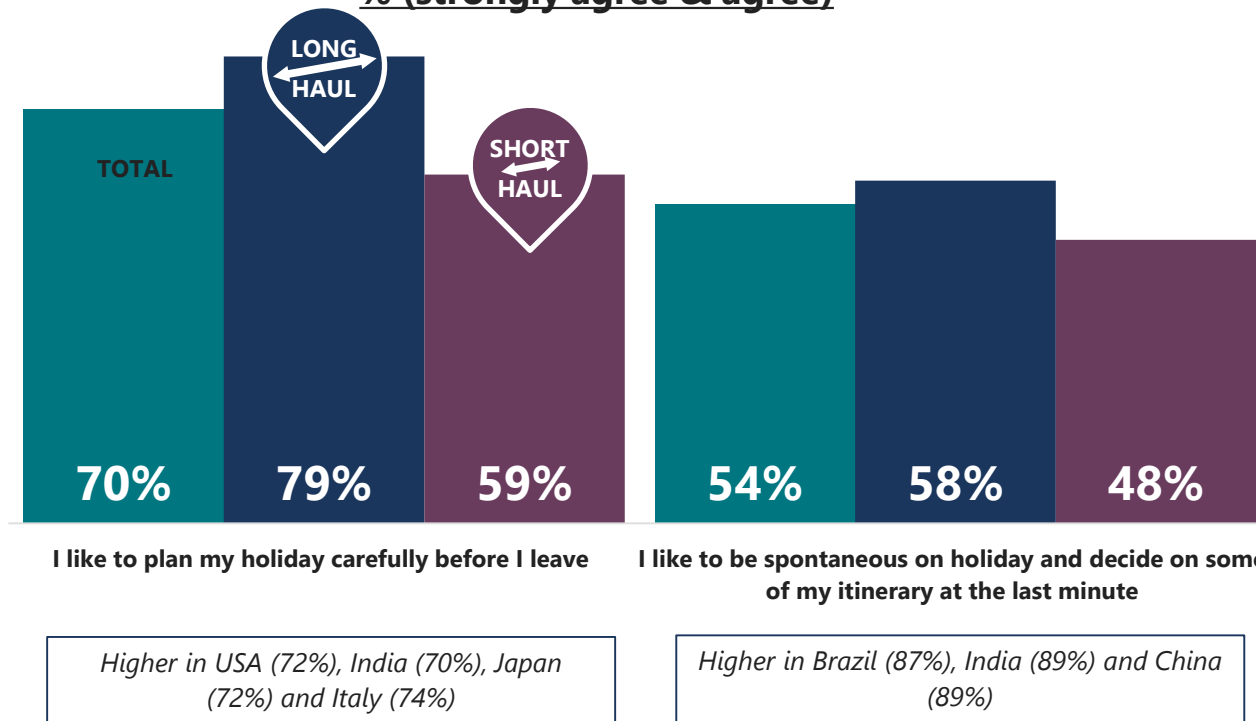
Who is responsible across the different holiday planning phases?

- Researching and booking of a holiday is more likely to be done by the individual whereas shortlisting and finalising destinations is more likely to be a joint responsibility.
- However, this varies by markets - long haul travellers are more likely to research destinations and make the final choice on their own whereas short haul travellers are more likely to involve travel companions whilst making the final choice.
- Overall holiday finalisation (making the final choice or booking) is male skewed – specifically in Japan, Russia, India, Gulf & France. At the global level there are no gender skews for the 'research' and 'shortlist destinations' phases.
- 70% globally say that "I like to plan my holiday carefully before I leave". Sweden and Netherlands are the two countries where fewer than half claim to be careful pre-planners; here, respondents are more likely to say that "I like to be spontaneous on holiday and decide on some of my itinerary at the last minute".

The vast majority of long haul travellers like to plan their holiday carefully in advance, especially travellers from Brazil, India and China. However, over half of travellers still like to be spontaneous when deciding on their itinerary.

Base: Visitors & Considerers

To what extent do you agree with the following statements about holidays?
 % (strongly agree & agree)



Whilst most markets prefer planning their holiday, US, India, Japan, UAE, Norway & Netherlands are also equally spontaneous in their holiday planning.

Base: Visitors & Considerers

To what extent do you agree with the following statements about holidays?
% (Strongly agree & agree)

LONG HAUL

	NZ	US	CA	AU	BR	RU	IN	CH	JP	SK	SA	UA
I like to be spontaneous on holiday and decide on some of my itinerary at the last minute	54	72	62	50	61	50	70	45	72	46	59	57
I like to plan my holiday carefully before I leave	71	83	73	75	87	80	89	89	69	78	74	67

SHORT HAUL

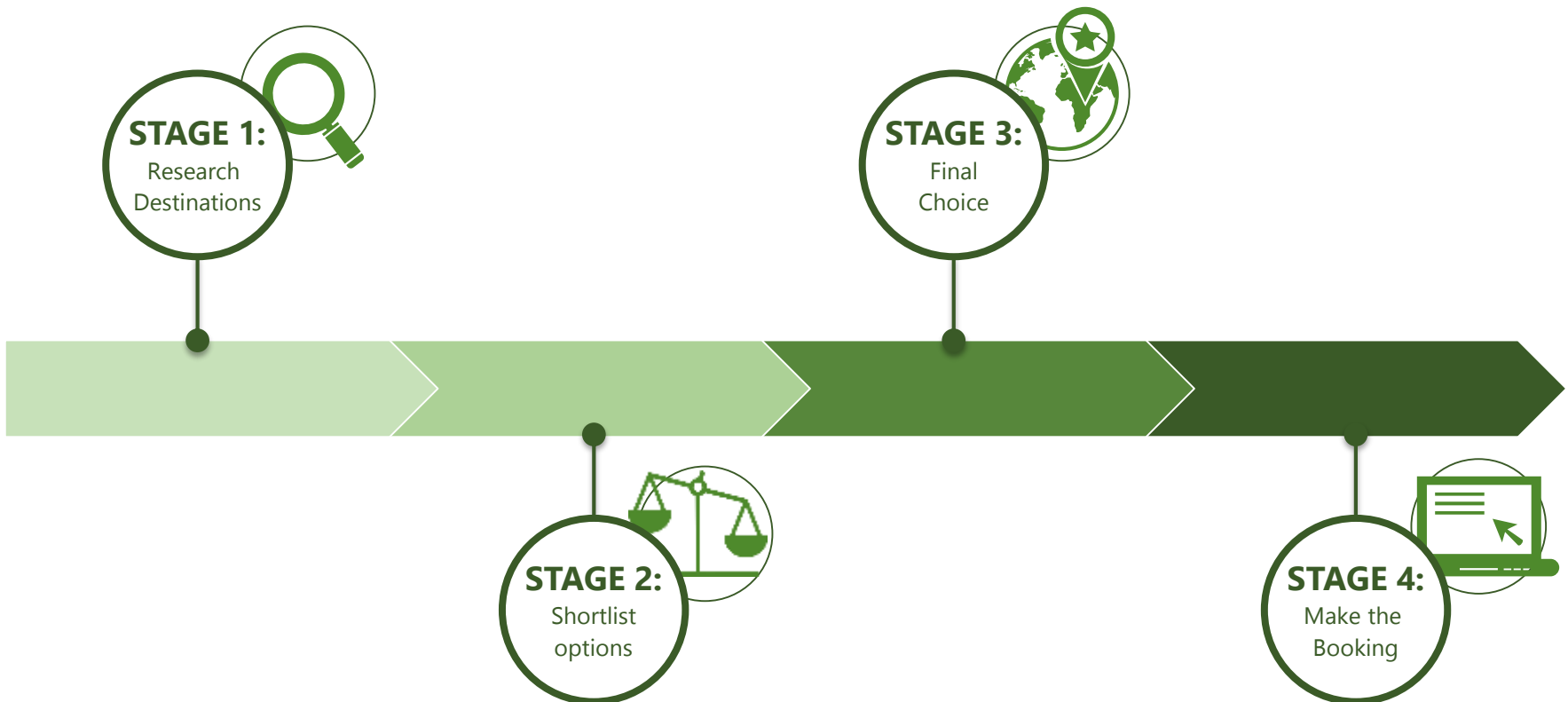
	DM	SW	NW	IT	GE	FR	SP	NE	Avg all global markets
I like to be spontaneous on holiday and decide on some of my itinerary at the last minute	42	53	33	55	38	56	58	53	54%
I like to plan my holiday carefully before I leave	58	48	56	74	68	65	73	28	70%

Top per market Highlighted

QR8: To what extent do you agree with the following statements about holidays?

Base: All participants (11400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

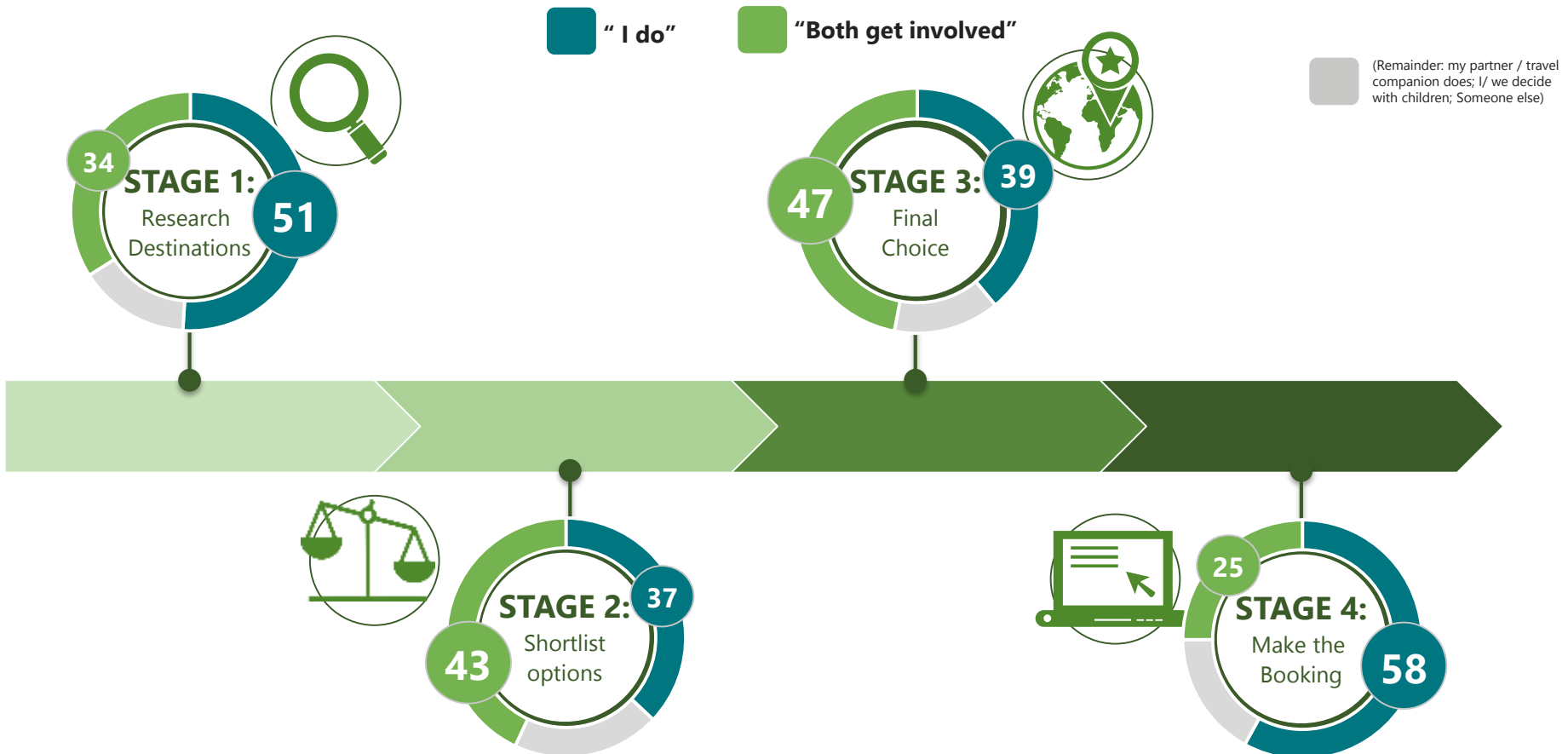
There are four key stages when travellers are planning a holiday...



When looking at responsibilities over the holiday planning process, 'researching' and 'booking' are done by individuals, whereas shortlisting and finalising a destination are done in consultation with travel companion.

Q: Who is most likely to do the following when it comes to your holidays?

Base: Visitors & Considerers



Note: Market level data in appendix

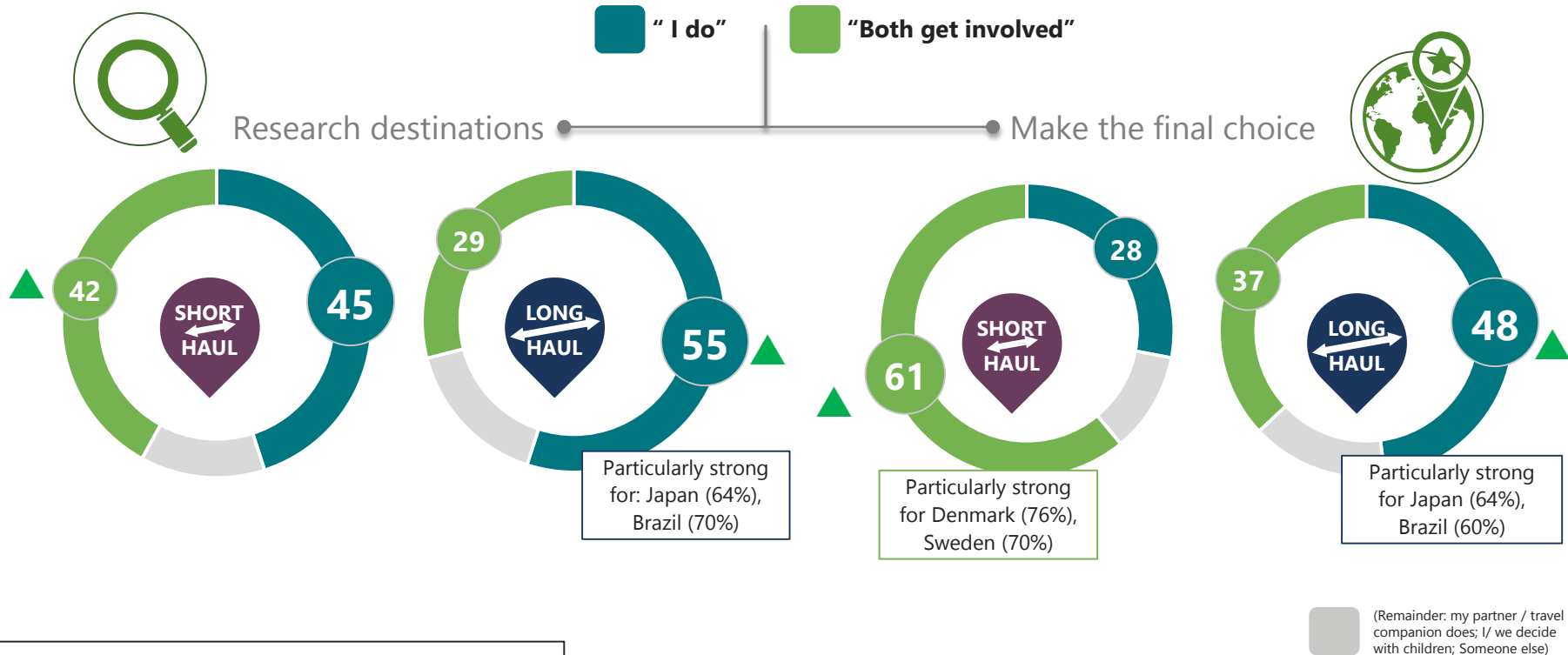
QR1: Who is most likely to do the following when it comes to your holidays?

Base: All participants (1140)

But this trend changes by markets – short haul travellers are more likely to research destinations in consultation and long haul travellers are more likely to make the final choice on their own.

Base: Visitors & Considerers

Q: Who is most likely to do the following when it comes to your holidays?



Similar trend for 'shortlisting' destinations

Note: Market level data in appendix

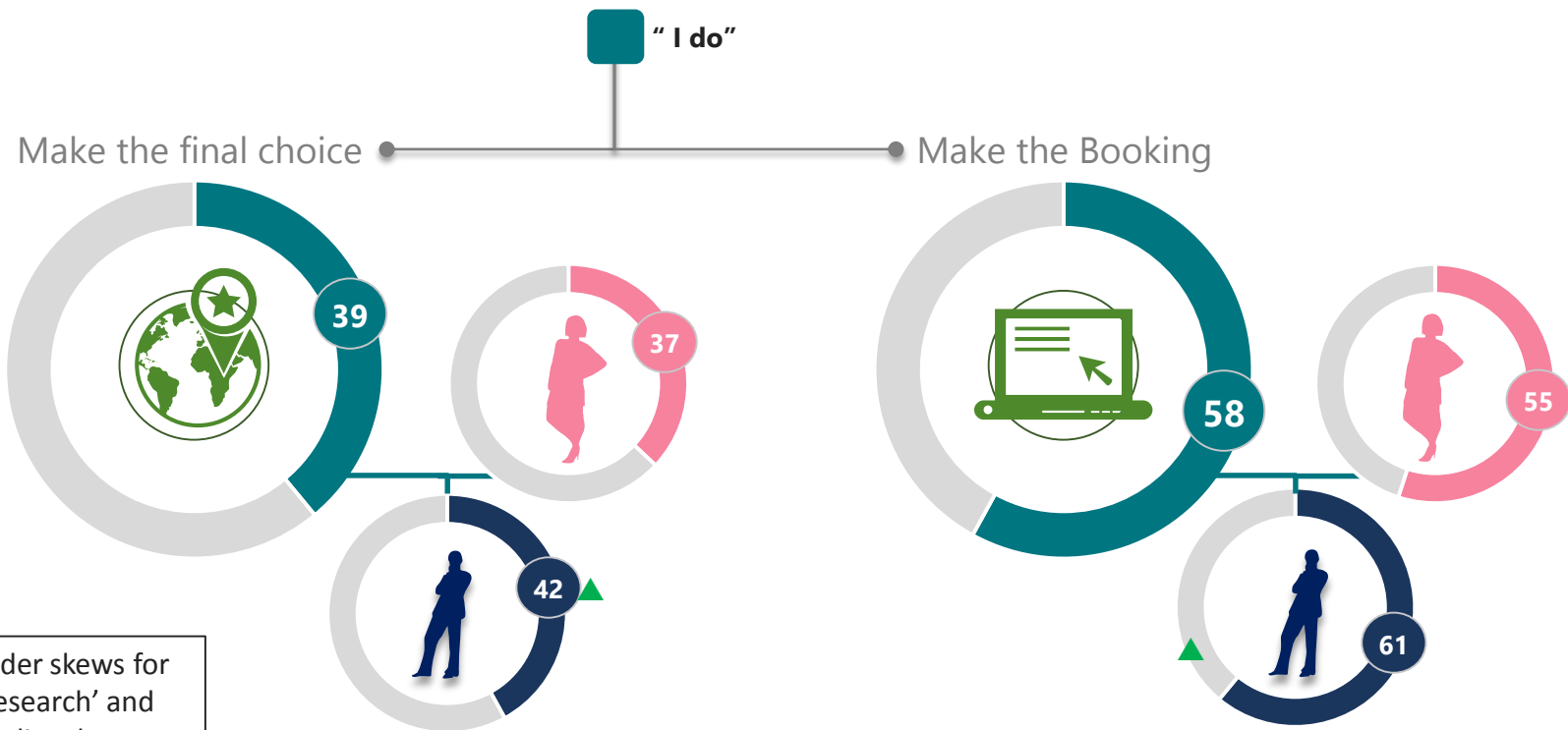
QR1: Who is most likely to do the following when it comes to your holidays?
 Base: All participants (1140), Long Haul total (6600), Short Haul Total (4800)

▲▼ significantly higher/ lower @ 95% confidence level

Looking at these stages by demographics, finalising a holiday (final choice and booking) is slightly more likely to be done by men than women – but varies by market (see appendix)

Base: Visitors & Considerers

Q: Who is most likely to do the following when it comes to your holidays?



No gender skews for the 'research' and 'shortlist phase'

Note: Market level data in appendix

QR1: Who is most likely to do the following when it comes to your holidays?
 Base: All participants (1140), Male (5825), Female (5575)

▲ ▼ significantly higher/ lower @ 95% confidence level

Looking within individual markets, Japan, Russia, the Gulf & India are the countries where men are most likely to finalise the holiday.

Q: Who is most likely to do the following when it comes to your holidays?

Base: Visitors & Considerers

Who makes the **final choice**?

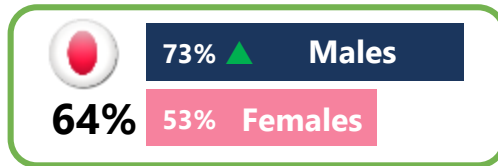
Who makes the **booking**?

Who is driving this?

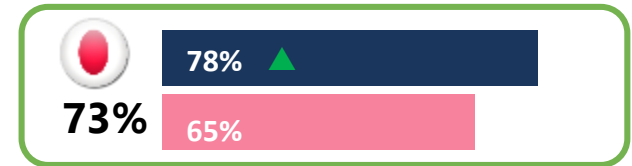
Who is driving this?

% 'I do' across countries

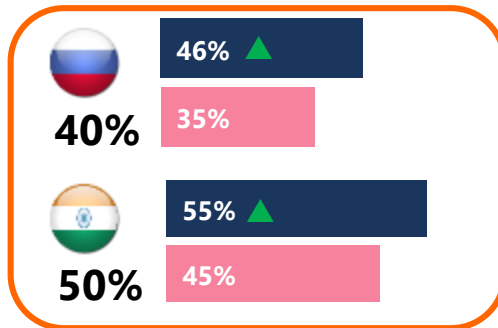
Advanced Asia



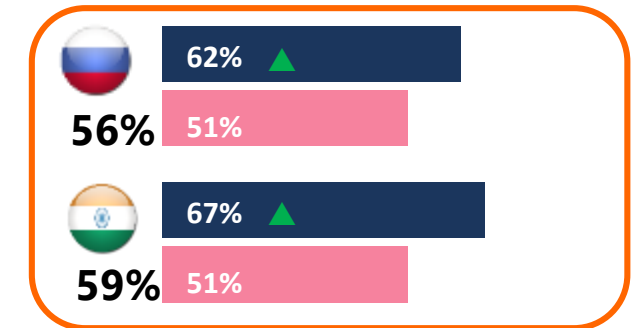
Advanced Asia



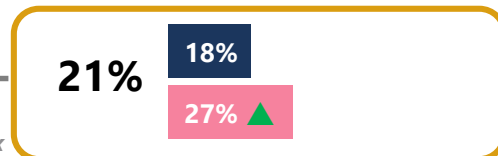
Emerging Markets



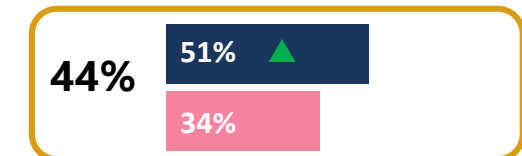
Emerging Markets



Gulf



Gulf



"My travel partner does it"

Note: Market level data in appendix

QR1: Who is most likely to do the following when it comes to your holidays?
 Base: All participants (1140), Make the final choice - Japan (Males: 343, Females: 257), Russia (Males: 283, Females: 317)
 Make the booking - Japan (Males: 343, Females: 257), Russia (Males: 283, Females: 317), India (Males: 306, Females: 294)

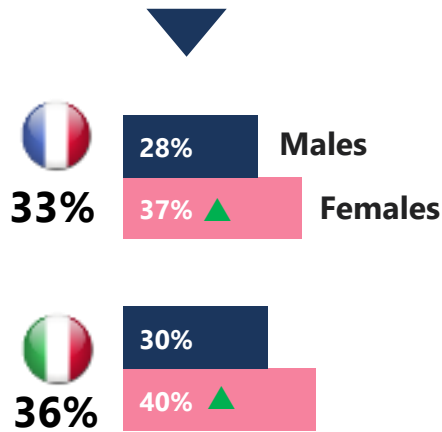
Within short haul markets, women are more likely to make the final choice & booking in France, whereas making the booking is more male dominated within Denmark, Netherlands & Germany.

Q: Who is most likely to do the following when it comes to your holidays?

Base: Visitors & Considerers

Who makes the **final choice**?

Who is driving this?

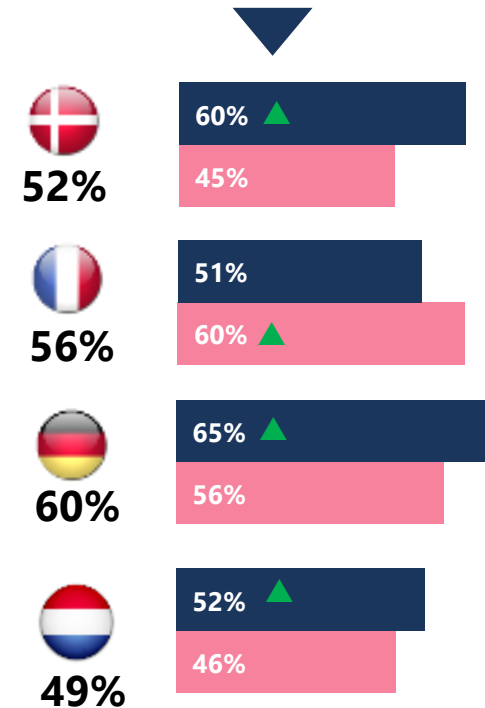


Other short haul markets have a similar proportion between males & females

% 'I do' across countries

Who makes the **booking**?

Who is driving this?



Other short haul markets have a similar proportion between males & females

Key: Male / Female

Note: Market level data in appendix

QR1: Who is most likely to do the following when it comes to your holidays?

Base: All participants (1140), Make the final choice - France (Males: 269, Females: 331), Italy (Males: 280, Females: 320)

Make the booking - Denmark (Males: 296, Females: 304), France (Males: 269, Females: 331), Germany (Males: 307, Females: 293), Netherlands (Males: 298, Females: 302) ▲ ▼ significantly higher/ lower @ 95% confidence level

#2 SUMMARY



Why visit Britain or other holiday destinations?

- Britain's cultural attractions are the strongest motivator both for visitors and those considering visiting.
- Holiday deals, countryside and variety of places to visit follow as other key motivators for travellers - this remains broadly similar between long haul/ short haul as well as past visitors to Britain and those considering to visit Britain
- However, 'deals' are a more important motivator for considerers than for previous visitors
- Vibrant cities and ease of travel to destination are also important consideration for short haul markets (city breaks - as they take more shorter trips) whereas security, accommodation and range of activities are more important for long haul travellers (since they take longer trips)
- **There is also variation across markets:**
 - UAE, Netherlands, Spain & Netherlands give more importance to 'good deals'
 - Climate is the most important factor for Gulf travellers
 - Brazilians give more importance to experience 'different culture'
 - Visiting family/friends is an important driver for New Zealand & Australia

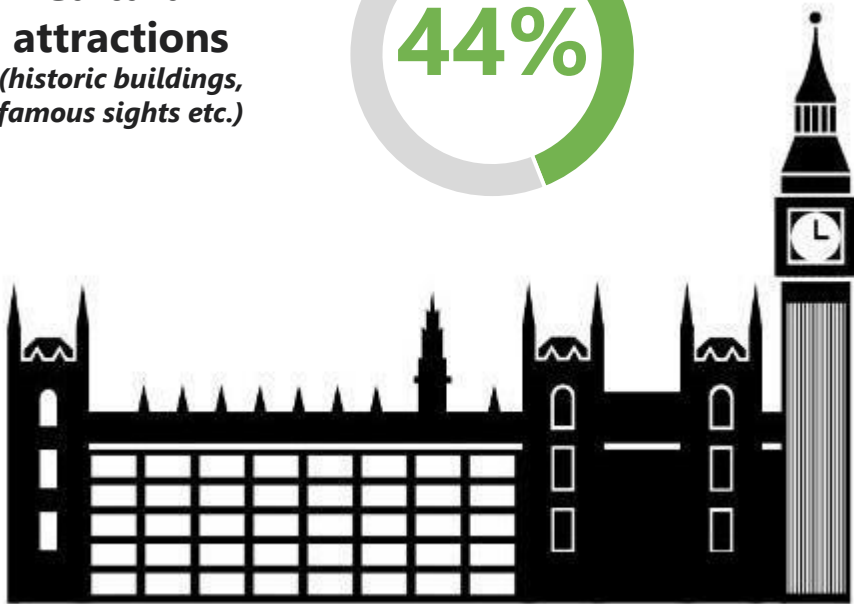
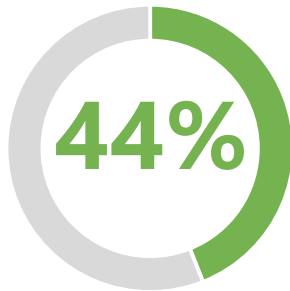
'Cultural attractions' are the most important motivator for travellers to visit Britain – this is even more important for females and older age groups.

Base: Visitors & Considerers

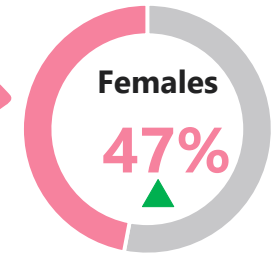
Q: When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain?
Which of the following would be the most important motivators for you to visit Britain on holiday in the future?

Top reasons to visit Britain/holiday destination

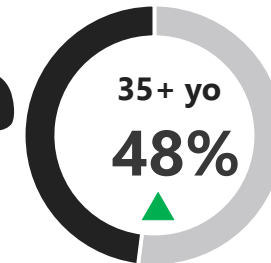
Cultural attractions
(historic buildings, famous sights etc.)



Driven by:



vs Males
(42%)



vs 18-34yo
(38%)

Note: Market level data in appendix

QR6 (Visitors): When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain? Please choose up to seven. (Considerers): Which of the following would be the most important motivators for you to visit Britain on holiday in the future? Please choose up to seven.

Base: All participants (11,400), Male (5825), Females (5575), 35+ (7142), 18-34 (2129)

▲ ▼ significantly higher/ lower @ 95% confidence level

Whilst cultural attractions remain the key motivators, good deals, countryside, and a variety of local places are also important for both visitors and considerers (although 'price and deals' are not as important for visitors).

Base: Visitors & Considerers

Q: When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain?
Which of the following would be the most important motivators for you to visit Britain on holiday in the future?

Top reasons to visit Britain/holiday destination

#1

18-24 yrs: 40%; 65-74 yrs: 54%

Cultural attraction



Considerers:
47% ▲

vs Visitors (42%)

#3

18-24 yrs: 21%; 65-74 yrs: 37%

Countryside & natural beauty



Considerers:
31% ▲

vs Visitors (22%)

#5

Wanted to go somewhere new



Considerers:
28% ▲

vs Visitors (23%)

18-24 yrs.: 32%; 65-74 yrs.: 22%

#2

Good deals (flights, package etc.)



Considerers:
32% ▲

vs Visitors (18%)

#4

Variety of places to visit



Considerers:
29% ▲

vs Visitors (25%)

The same pattern seen for both long haul and short haul markets

Note: Market level data in appendix

QR6 (Visitors): When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain? Please choose up to seven. (Considerers): Which of the following would be the most important motivators for you to visit Britain on holiday in the future? Please choose up to seven.

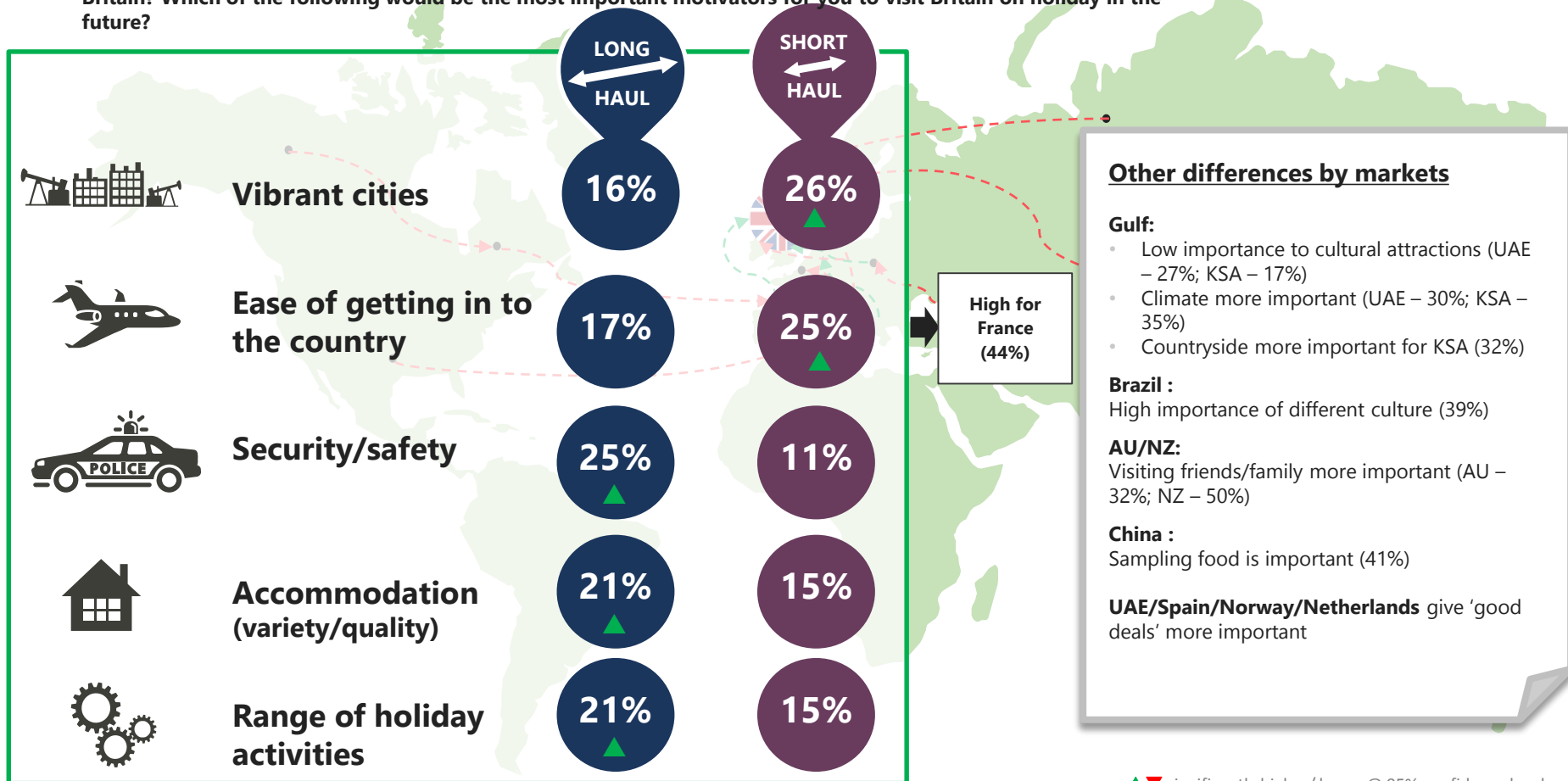
Base: Total (11,400), Visitors (5700), Considerers (5700)

▲ ▼ significantly higher/ lower @ 95% confidence level

Whilst the top motivators remain the same for both short and long haul markets, vibrant cities and ease of travel to destination are more of an influencer for short haul markets who are more likely to do a city break. Long haul markets are more inclined towards destinations that provide overall wellbeing and a range of activities.

Q: When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain? Which of the following would be the most important motivators for you to visit Britain on holiday in the future?

Base: Visitors & Considerers



▲ ▼ significantly higher/ lower @ 95% confidence level

QR6 (Visitors): When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain? Please choose up to seven. (Considerers): Which of the following would be the most important motivators for you to visit Britain on holiday in the future? Please choose up to seven.
 Base: All participants (11,400), Long haul (6600), Short haul (4800)

Most travellers are attracted to cultural attractions but there are differences by markets - 'visiting family/friends' is important for NZ/AU, 'different culture' is important to Brazilians and climate is important for Gulf travellers.

Q: Which of the following were the most important reasons why you chose to visit Britain?/ Base: Visitors & Considerers
Which of the following would be the most important motivators for you to visit Britain on holiday in the future?

% Top reasons to visit Britain/holiday destination

Scores adjusted for market comparability (see notes)	AUS	BRA	CAN	CHI	DEN	FRA	GER	IND	ITA	JAP	NET	NZ	NOR	RUS	SKOR	SPA	SWE	USA	Gulf	Total
Cultural attractions e.g. historic buildings and famous sights	48%	36%	41%	41%	63%	46%	44%	26%	45%	52%	47%	42%	48%	42%	46%	42%	45%	33%	17%	42%
A wide variety of places to visit around the country	27%	31%	26%	21%	8%	28%	42%	33%	23%	27%	24%	29%	16%	31%	23%	22%	15%	23%	19%	25%
I'd never been before and wanted to go somewhere new	18%	23%	25%	17%	16%	23%	24%	14%	27%	32%	22%	20%	14%	44%	27%	25%	22%	17%	23%	23%
Possibility of visiting friends or relatives	44%	14%	24%	9%	24%	21%	18%	24%	17%	18%	25%	65%	28%	11%	11%	19%	24%	18%	16%	22%
Somewhere where they speak English	18%	18%	21%	11%	28%	24%	33%	17%	29%	34%	13%	17%	27%	25%	20%	28%	21%	23%	15%	22%
Easy to get around	30%	21%	23%	15%	33%	28%	20%	15%	27%	19%	16%	24%	33%	9%	20%	20%	27%	26%	16%	22%
Countryside and natural beauty	31%	18%	25%	34%	18%	14%	31%	28%	14%	24%	34%	27%	12%	14%	16%	18%	9%	22%	23%	22%
Vibrant cities	17%	9%	18%	20%	33%	29%	31%	16%	25%	13%	37%	18%	32%	11%	14%	18%	40%	20%	24%	22%
The ease of getting to the country	21%	10%	16%	16%	34%	46%	17%	20%	21%	20%	22%	23%	34%	13%	11%	25%	30%	15%	16%	21%
A mix of old and new	26%	21%	22%	9%	21%	14%	21%	14%	21%	12%	13%	24%	23%	27%	22%	18%	26%	18%	17%	19%
A culture that is different from our own	8%	31%	15%	25%	13%	30%	16%	18%	25%	26%	23%	8%	5%	22%	25%	21%	7%	15%	20%	19%
A good deal e.g. on flights, total holiday package	18%	12%	14%	25%	15%	19%	15%	20%	21%	12%	26%	17%	25%	15%	23%	25%	10%	16%	21%	18%
Sampling the local food and drink	13%	20%	24%	37%	22%	18%	17%	14%	10%	15%	16%	12%	11%	24%	13%	12%	21%	18%	19%	18%
Contemporary culture (e.g. music, films, art, literature)	10%	23%	15%	24%	23%	16%	13%	13%	19%	19%	13%	10%	16%	14%	20%	17%	32%	19%	19%	18%
Security / safety	15%	26%	26%	22%	4%	6%	9%	23%	12%	32%	7%	13%	11%	13%	23%	23%	9%	22%	21%	17%
Easy to get plan/organise	16%	14%	14%	8%	26%	24%	18%	13%	21%	10%	11%	16%	32%	8%	8%	15%	23%	20%	14%	16%
Accommodation – variety and quality	12%	22%	14%	22%	7%	8%	15%	22%	14%	18%	24%	12%	13%	14%	17%	13%	11%	18%	22%	16%
A wide range of holiday activities	14%	13%	17%	10%	6%	4%	13%	20%	20%	11%	4%	14%	7%	14%	19%	19%	12%	12%	19%	13%
Meeting the local people	15%	22%	14%	7%	14%	16%	16%	13%	12%	7%	15%	13%	11%	10%	8%	13%	17%	16%	14%	13%
The cost of staying in the destination	15%	12%	11%	17%	9%	4%	7%	14%	11%	10%	17%	11%	13%	14%	13%	16%	9%	12%	15%	12%
The climate / weather	7%	17%	14%	18%	2%	3%	7%	27%	8%	14%	6%	7%	4%	18%	17%	8%	2%	14%	27%	12%
Watching sport	8%	10%	8%	14%	7%	4%	5%	12%	3%	4%	11%	8%	17%	12%	14%	6%	15%	17%	15%	10%
Visit a film or TV location	5%	9%	4%	8%	6%	4%	5%	10%	5%	5%	6%	3%	5%	26%	23%	8%	7%	12%	14%	9%
Somewhere it is easy to visit with children	6%	7%	7%	7%	7%	11%	2%	12%	7%	6%	5%	6%	2%	8%	6%	8%	6%	12%	14%	8%

QR6: (Visitors) When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit Britain? **(Considerers)** Which of the following would be the most important motivators for you to visit Britain on holiday in the future? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

Base: All participants (11400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

#3 SUMMARY



What are the key information sources when deciding on a holiday destination?

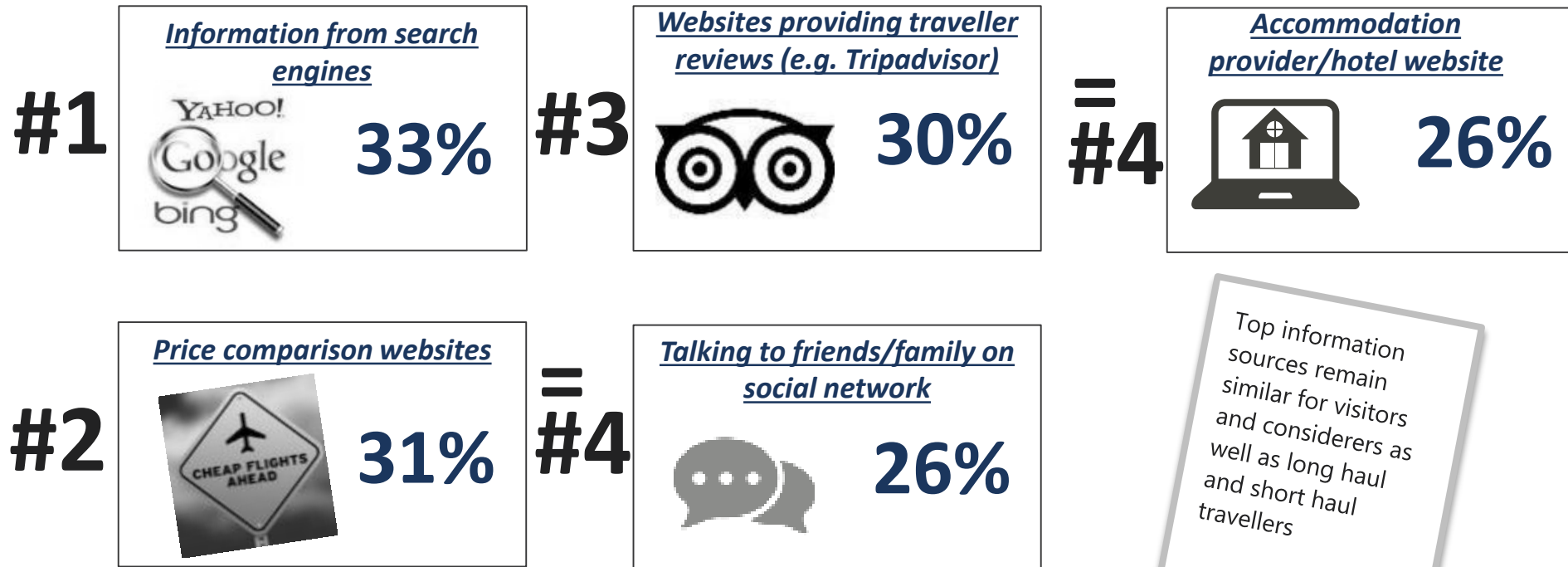
- **Search engines, price comparison websites and word of mouth** (traveller reviews, conversations on social media) are **broadly the key online information sources** for travellers.
- But **travel agents/tour operator websites and accommodation provider websites are more influential for long haul markets**, whereas almost **a third of travellers from short haul markets are not influenced by any listed sources**.
- **Differences by markets –**
 - Travel blogs are important for Brazil, India, Russia, South Korea, Spain & Italy
 - Price comparison websites are more important in Canada, NZ and Gulf
- **Word of mouth is the key offline information source** across markets (not as strong in Japan). **Travel guide books, agents and travel programmes on TV are the other key influencers** across markets; however they are **not as strong within short haul markets** (35% travellers within short haul are not influenced by any listed offline sources).
- **Differences by markets –**
 - Travel guide books are more popular in Advanced Asia and US, China and Brazil
 - Travel programmes on TV are more influential in Brazil, China, Russia & South Korea
 - UAE travellers are also more influenced by price advertisements
 - Nordics and Netherlands are most likely to not go to any information source

Search engines, price comparison websites, traveller reviews and social media conversations are the key online information sources for travellers when deciding on a holiday destination

Base: Visitors & Considerers

Q: Thinking about your holiday to Britain/ the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?

Top online information sources



Top information sources remain similar for visitors and considerers as well as long haul and short haul travellers

Note: Market level data in appendix

QR2 (Visitors): Thinking about your holiday to Britain, which of the following online information sources influenced your choice of destination? (Considerers): Thinking about the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?

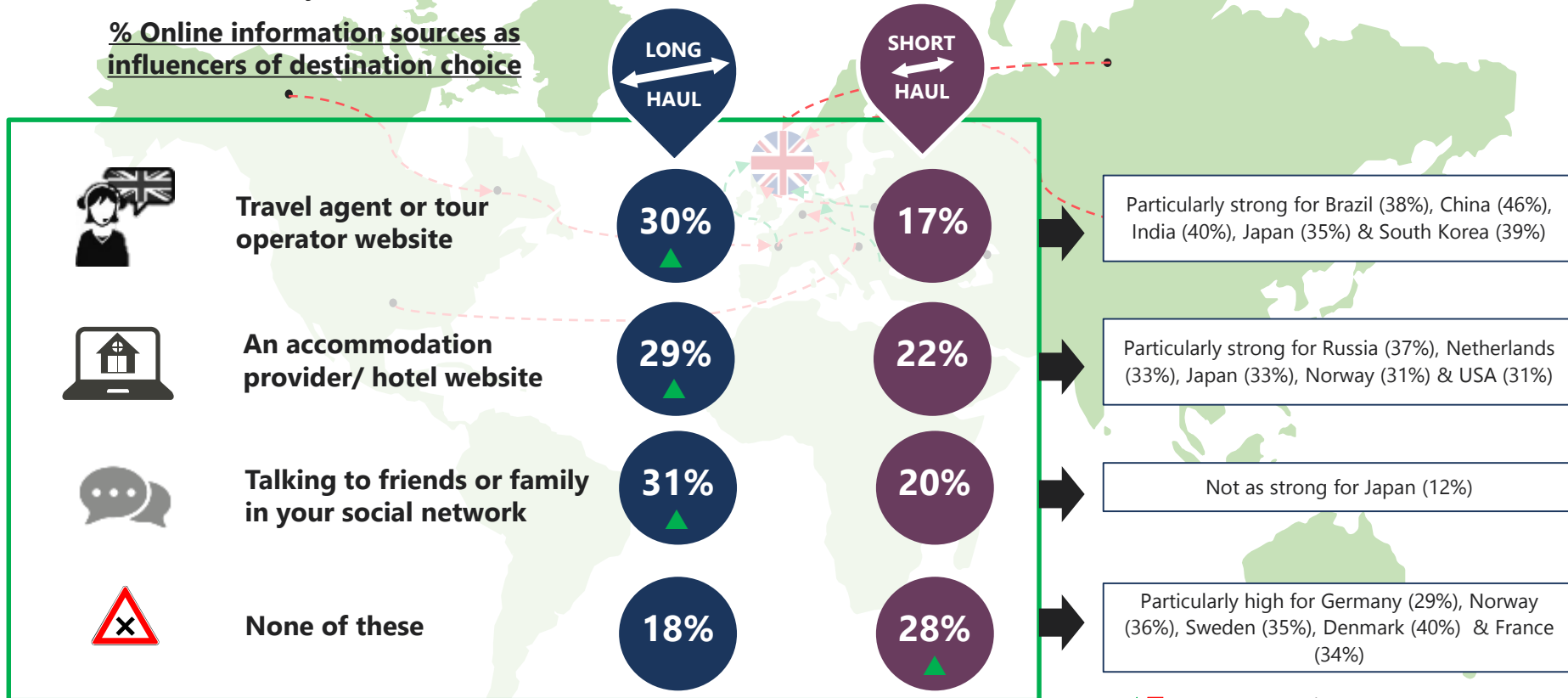
Base: All participants (11,400)

When looking at key sources by broad markets – travel operator / accommodation websites and social media are more important for long haul travellers, whereas almost a third of short haul travellers are not influenced by any of the listed online sources. (However, there are differences by individual markets).

Base: Visitors & Considerers

Q: Thinking about your holiday to Britain/ the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?

% Online information sources as influencers of destination choice



▲ ▼ significantly higher/ lower @ 95% confidence level

QR2 (Visitors): Thinking about your holiday to Britain, which of the following online information sources influenced your choice of destination? (Considerers): Thinking about the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?

Base: All participants (11,400), Long Haul (3300), Short Haul (4800)

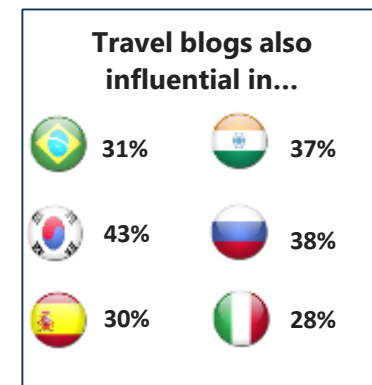
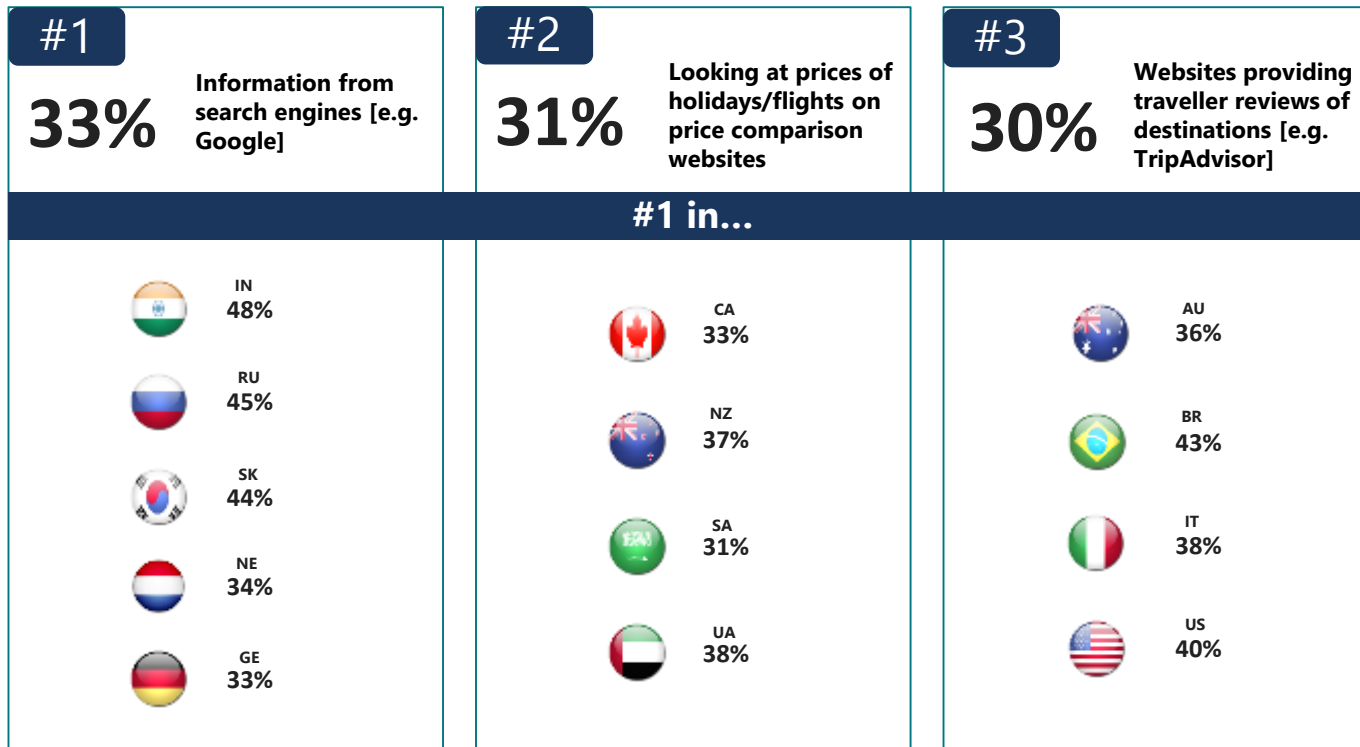
Note: Market level data in appendix

The top online influencers remain the same across countries, however price comparison websites are more important in the Gulf, Canada & NZ. Traveller reviews are more important in AU, Brazil, Italy and the US. Travel blogs also emerge as an important influencer in Brazil, India, Russia, South Korea, Spain & Italy.

Base: Visitors & Considerers

Which online sources influenced people the most?

Top online sources



QR2: (Visitors) Thinking about your holiday to Britain, which of the following online information sources influenced your choice of destination? (Considerers) Thinking about the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?

Base: All participants (11400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

Note: Market level data in appendix

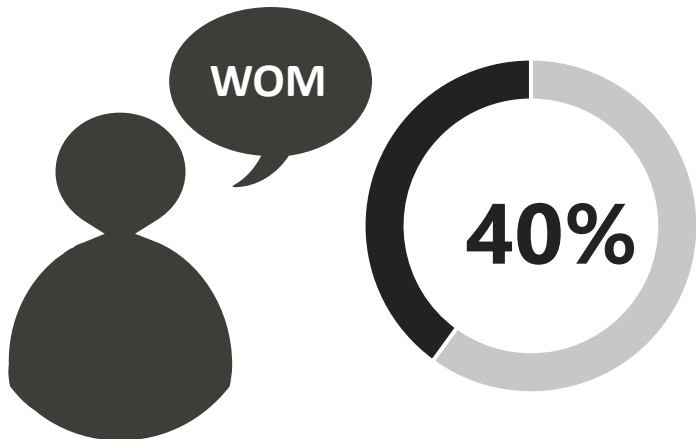
Looking at offline information sources, word of mouth is the most influential when travellers are finalising a holiday destination – similar for visitors/considerers and long haul/short haul travellers.

Base: Visitors & Considerers

Q: Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination?

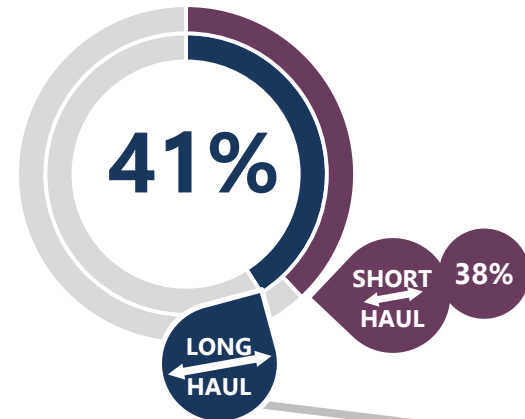
% Offline information sources as influencers

#1



Driven by 18-34yo **44%**
sig ▲ vs 35+yo (**38%**)

Note: Market level data in appendix



The same pattern is seen for both Visitors & Considerers

QR3 (Visitors): Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination? (Considerers): Thinking about the last holiday you took to a foreign country, which of the following other information sources influenced your choice of destination?

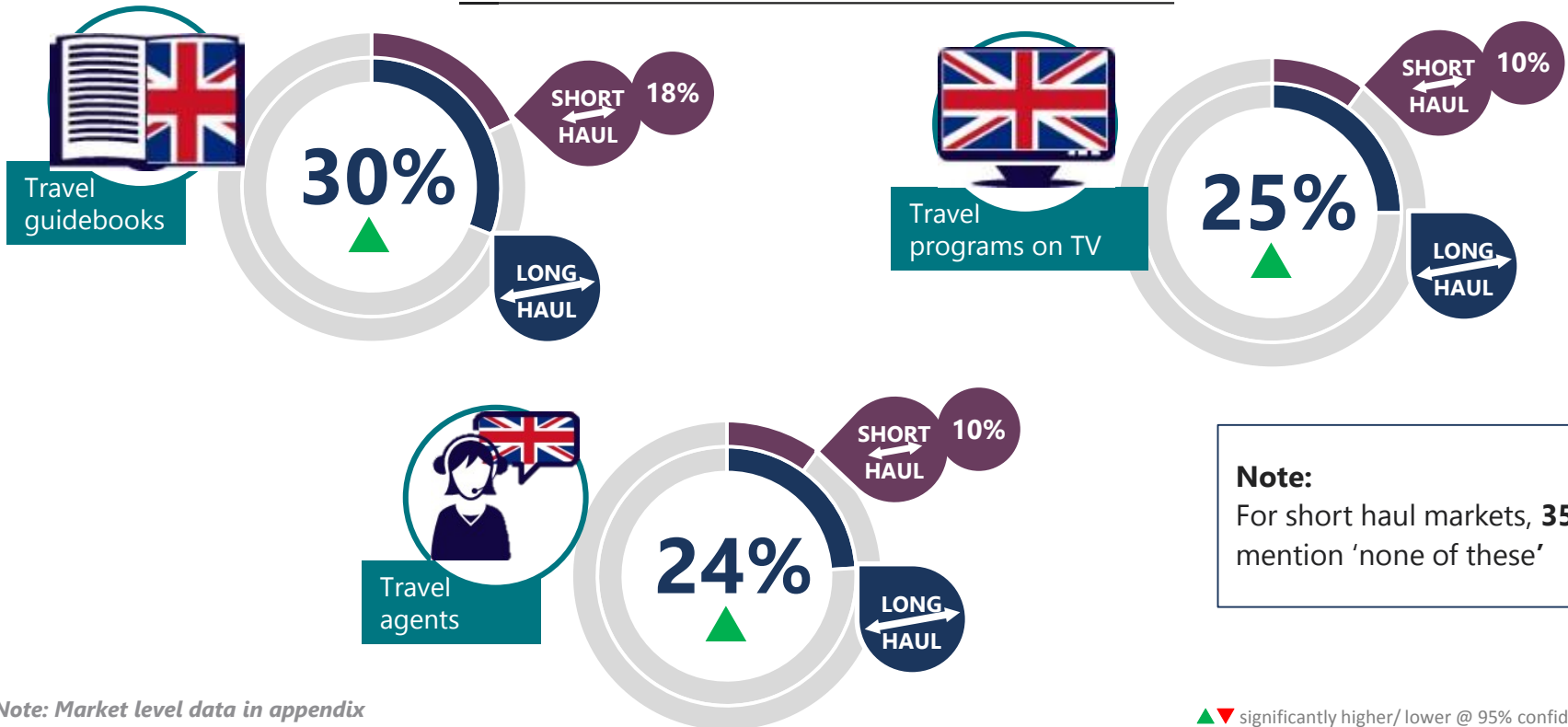
Base: All participants (11,400), Long Haul total (6600), Short Haul Total (4800), 18-34 yrs. (4257), 35+ yrs (7143)

Whilst travel guidebooks, travel agents and TV travel programmes are the other key information sources, they are a stronger influence within long haul. A third of short haul travellers claim not to refer to any of the listed information sources

Base: Visitors & Considerers

Q: Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination?

% Offline information sources as influencers



Note:
For short haul markets, 35% mention 'none of these'

Note: Market level data in appendix

▲ ▼ significantly higher/ lower @ 95% confidence level

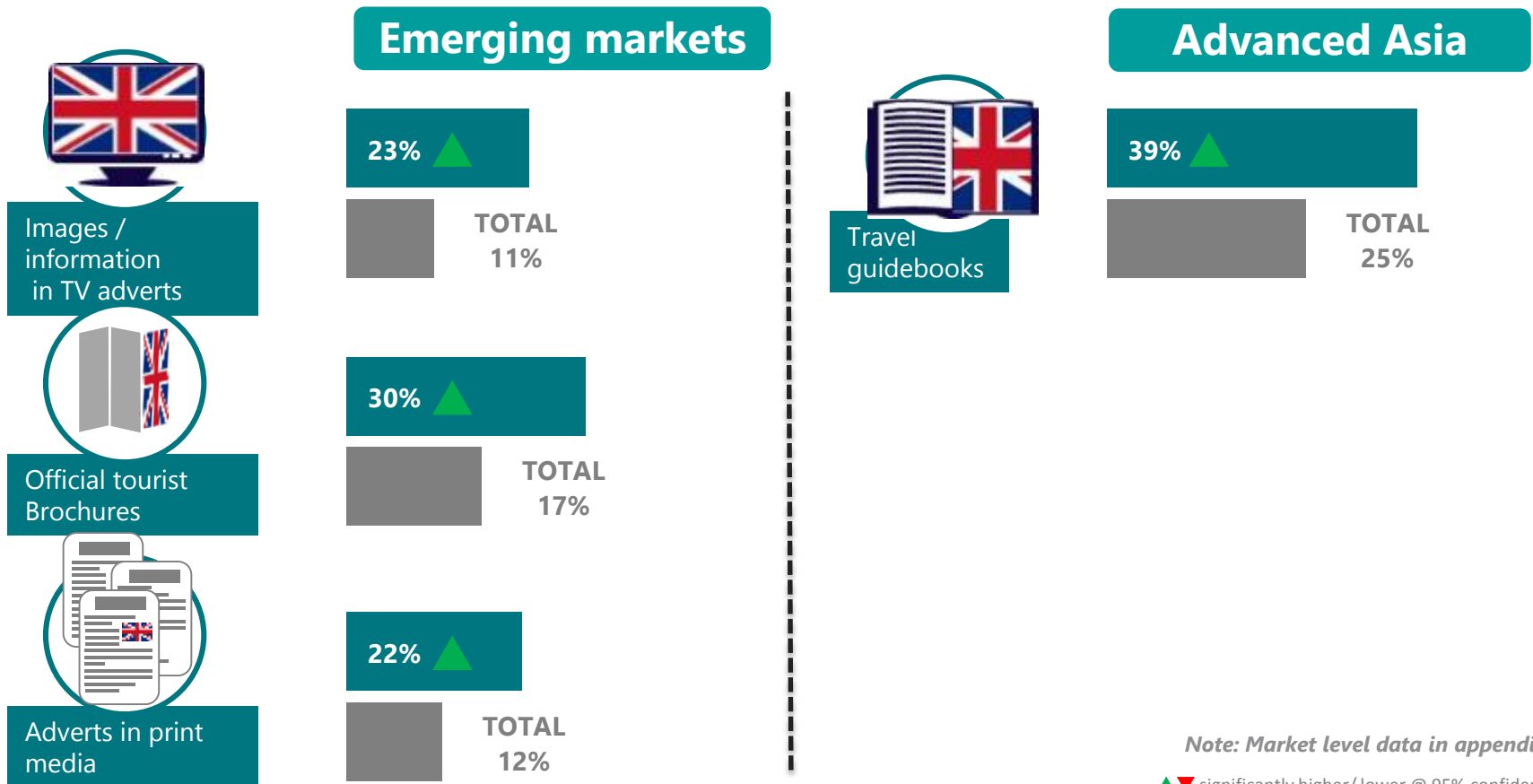
QR3 (Visitors): Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination? (Considerers): Thinking about the last holiday you took to a foreign country, which of the following other information sources influenced your choice of destination?

Base: All participants (11,400), Long Haul total (6600), Short Haul Total (4800),

Looking at market clusters, emerging markets are also more influenced by TV, prints ads and official tourist brochures, whereas those from Advanced Asia are more influenced by travel guidebooks.

Base: Visitors & Considerers

Q: Thinking about your holiday to Britain/ the last holiday you took to a foreign country, which of the following online information sources influenced your choice of destination?



Note: Market level data in appendix

▲ ▼ significantly higher/ lower @ 95% confidence level

QR3 (Visitors): Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination? / (Considerers) Thinking about the last holiday you took to a foreign country, which of the following other information sources influenced your choice of destination?

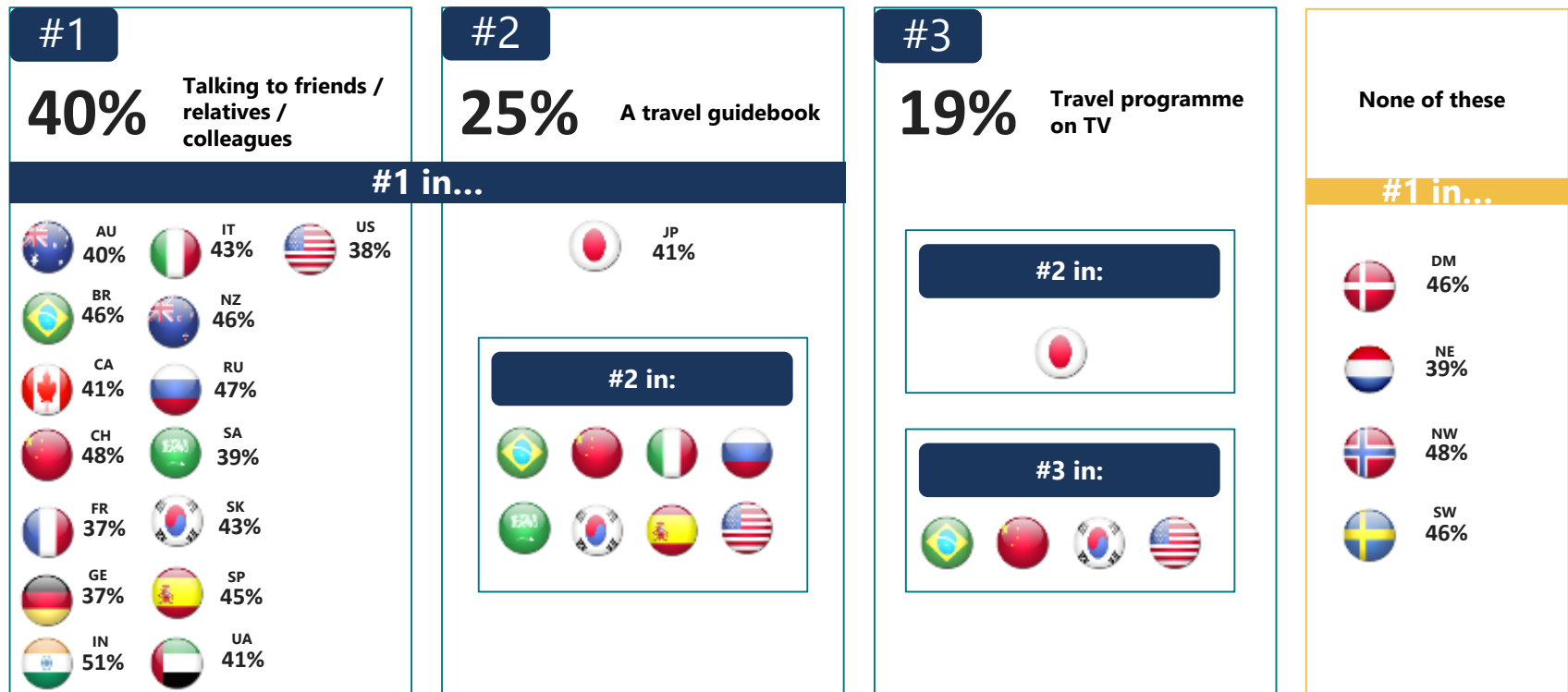
Base: All participants (11400) Advanced Asia (1200), Emerging markets (2400)

Discussions with friends or relatives is the most influential offline source, ranking top in most markets. Some northern European countries, including Sweden and Norway, a high proportion claim not to have used any offline sources.

Base: Visitors & Considerers

Which other sources influenced people the most?

Top offline sources – by rank per market



QR3: (Visitors) Thinking about your holiday to Britain, which of the following other information sources influenced your choice of destination? (Considerers) Thinking about the last holiday you took to a foreign country, which of the following other information sources influenced your choice of destination?

Base: All participants (11400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), United Arab Emirates (253), United States (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

#4 SUMMARY



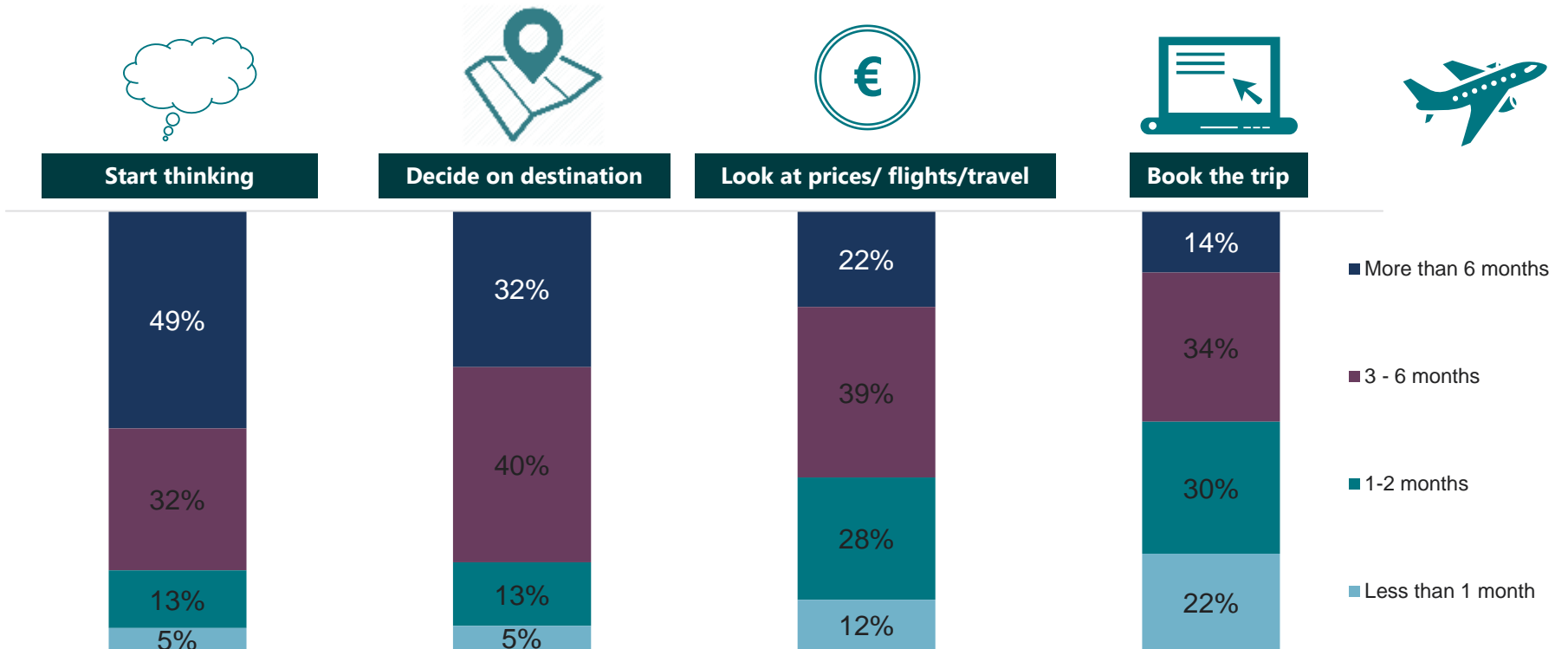
When did people start to plan their holiday to Britain?

- **The journey to book a holiday typically lasts 3+ months.**
Around half of respondents start to think about their trip 6+ months in advance, and decide on their destination within the next 3 months.
Around one third book their trip 3-6 months in advance, and nearly a third book their trip 1-2 months in advance.
- **In general, long haul visitors tend to start all stages earlier,** a quarter look at prices 6+ months in advance and are more likely to also book that far in advance. But there are **differences within long haul markets:**
 - China are most likely to look at prices and book only a few weeks in advance
 - Many in Gulf, Russia and India are also likely to book their holiday only a few weeks in advance
 - Australia and New Zealand have the longest booking lead time, followed by visitors from the Americas.
- Short haul visitors are more likely to **start thinking about their trip and looking at prices 3-6 months in advance.** There are **differences by short haul markets:**
 - Most visitors from Germany start thinking about their trip 6+ months in advance
 - More than half from Spain, Netherlands and Sweden book 1-2 months in advance or later

The journey to book a holiday to Britain typically lasts 3+ months. Half of people started thinking about their trip 6+ months in advance and decide on a destination within the next 3 months. Looking at prices typically also comes alongside deciding on a destination (price is likely to be a factor when narrowing down on choices), though some do it a month later. Booking a trip comes about 2-3 months before the trip

Base: Visitors

When do people start looking to come to Britain?



Note: Market level data in appendix

Long haul markets typically start thinking and planning their trip to Britain earlier than short haul visitors – with a few notable exceptions. Unlike short haul markets, long haul travellers are most likely to start thinking about their trip 6+ months in advance.

Start thinking



When do people start looking to come to Britain?

Base: Visitors

LONG HAUL

SHORT HAUL

	AUS	USA	CAN	NZ	BRA	RUS	IND	CHI	JAP	KOR	SAU	UAE	DEN	SWE	NOR	ITA	GER	FRA	SPA	NET
6+ months before trip	76%	60%	59%	70%	58%	57%	48%	42%	48%	48%	37%	44%	38%	38%	41%	36%	57%	42%	40%	32%
3-6 months before	14%	21%	29%	20%	28%	26%	34%	33%	36%	31%	35%	30%	34%	39%	36%	40%	28%	29%	34%	36%
1-2 months before	5%	10%	6%	5%	9%	11%	12%	18%	11%	15%	15%	14%	18%	14%	11%	16%	9%	18%	18%	18%
Less than 1 month before	3%	7%	5%	3%	4%	4%	4%	6%	1%	4%	6%	10%	6%	7%	7%	7%	5%	8%	7%	8%

QR5: Thinking about your holiday to Britain, how far in advance did you...?

Base: Visitors (5700), Australia (300), Brazil (300), Canada (300), China (300), India (300), Japan (300), New Zealand (300), Russia (300), Saudi Arabia (175), South Korea (300), United Arab Emirates (125), United States (300), Denmark (300), France (300), Germany (300), Italy (300), Netherlands (300), Norway (300), Spain (300), Sweden (300)

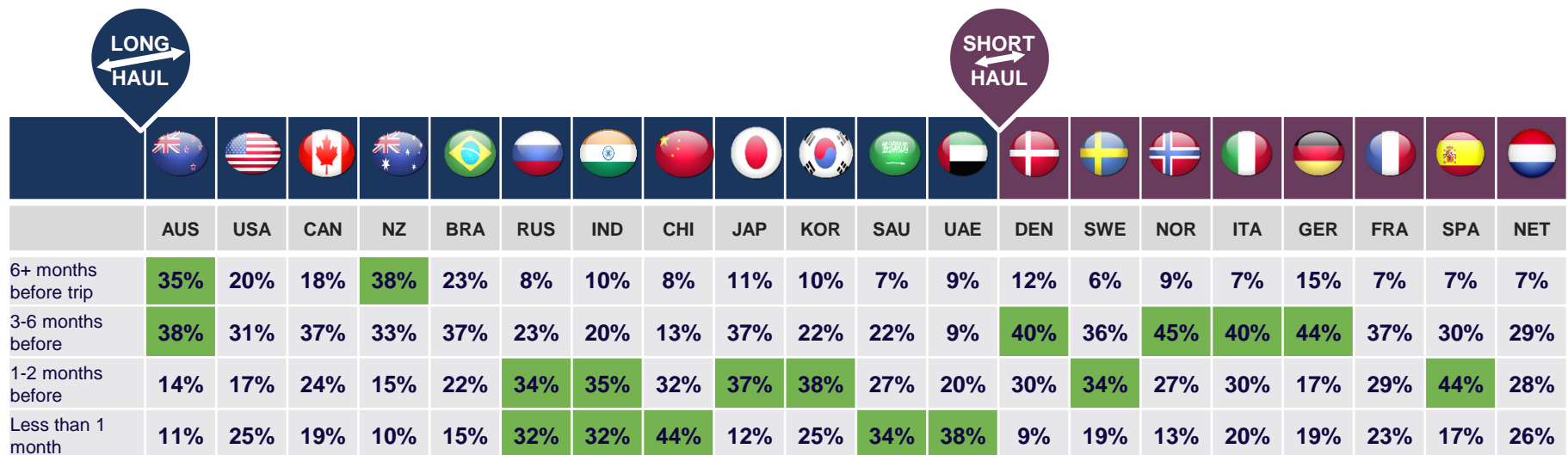
However, not all markets among long haul behave the same. Visitors from Gulf are most likely to book their trip just a few weeks in advance, while Advanced Asia and Emerging Markets book their holiday 1-2 months in advance

Base: Visitors



Book the trip

When do people book their trip Britain?



QR5: Thinking about your holiday to Britain, how far in advance did you...?
 Base: Visitors (5700) Gulf (300), Advanced Asia (600), Emerging Markets (1200)

SUMMARISING HOLIDAY RESEARCH & PLANNING

- **Researching and booking** of a holiday is **more likely to be done by the individual** whereas **shortlisting and finalising destinations** is more likely **to be a joint responsibility**. However, this trend changes by markets: long haul markets are more likely to make the final choice of destination on their own, whereas short haul markets are more likely to consult their travel partner or spouse.
- The **key motivator for travellers to decide on a holiday destination**/Britain is **cultural attractions**. Other top motivators for visiting a destination are the **countryside, good deals, variety of places to visit** and the fact that it was **somewhere new** – all these were predominantly higher for considerers than visitors.
- The most **popular information sources used when researching** a holiday **are search engines, price comparison sites and word of mouth**. Other information sources such as travel guidebooks, programmes and agents were also more influential for long haul markets.
- Around half of visitors **start to think about a holiday 6+ months** in advance but a similar proportion book their trip less than three months in advance. In general, **long haul visitors tend to start all stages earlier**, a quarter look at prices 6+ months in advance and are more likely to also book that far in advance, although there are some exceptions with planning and booking lead times varying greatly by market.