

KANTAR MillWARD BROWN



Luxury Travel Research
USA, China and Gulf

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APPENDIX

Objectives

- Understand current and potential luxury tourists to the UK and what Britain could and should offer to the luxury traveller
- Establish how Britain should reach this audience and how to strategically market to them in order to increase tourist visits and spending
- Understand the differences across markets and also the evolution / future direction of luxury travel trends covering high-end / high net worth luxury travellers as well as the affordable luxury / mass affluent segment



Defining High Net Worth (HNW) and Mass Affluent (MA)

For the purposes of this study the following were used to define the two traveller groups

Mass Affluents



**US\$150,000 - \$1 Million
in liquid assets**

High Net Worth Individuals (HNWIs)



\$1 Million plus in liquid assets

3 key luxury markets: USA, China, GCC

USA, China and the GCC have been identified among Britain's inbound markets as important for luxury travel opportunities.

The USA is ranked first globally by number of HNWIs, and this population is growing year-on-year. China's population of HNWIs has been booming in recent years, and there are now over 1.1 million such individuals. Finally, the GCC (or Gulf Cooperation Council) counts six countries where some nationals are among the richest in the world too: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE).

Four GCC markets were in Britain's top 10 inbound markets by spend per visit in 2016, with Saudi Arabia being 2nd. Both Saudi Arabia and Kuwait feature in the top 25 source markets by volume of HNWIs. Overall, Saudi Arabia is the most populated country in the GCC (3-in-5 inhabitants) and UAE residents make up over 45% of GCC visits to the UK, which make both markets key in this area.

The USA is Britain's 1st inbound market in terms of spending, and inbound spend by Chinese visitors has more than doubled in the 5 years to 2016. China is also the most valuable international tourism market, and the USA ranks 2nd. Both markets are key for Britain's international tourism receipts.




MARKET	HNW population			International tourism expenditure		Recent visits to Britain (2014-2016 averages)		
	2016 HNWIs	2016 ranking	Growth on 2015	2016 spending	2016 ranking	Spend per visit	Spend per night	2016 ranking for total inbound spend
	4,795,000	1	8%	\$123.6 bn	2	£960	£111	1
	1,129,000	4	9%	\$261.1 bn	1	£2,233	£118	12
 Saudi Arabia (for GCC)	176,000	16	5%	\$18.7 bn	15	£2,886	£172	18 (GCC total would be 3 rd)

Sample structure

Kantar Millward Brown conducted in April 2017 a detailed qualitative study comprising of 30 depth interviews in total with 10 per market in US, Gulf and China. These interviews were conducted in order to gain more insight into Mass Affluent and High Net Worth individuals. Additionally, these results also fed into the design of a comprehensive questionnaire for the main part of the study which was conducted quantitatively.

The quantitative survey among 953 travellers was conducted between June and September 2017.

Quantitative

MARKET	HNWI	MASS AFFLUENT	TOTAL
	53	400	453
	50	200	250
	50	200	250

Qualitative

HNWI	MASS AFFLUENT	TOTAL
5	5	10
5	5	10
5	5	10

For more details, please refer to the appendix.

Summary and Recommendations



Key summary

- 1 High awareness/consideration.** Britain was ranked in the top 3 for prompted awareness in every market for a luxury holiday, comes **1st for Gulf and China; 3rd for USA**. Perceptions of Britain are **positive** with a view of being **luxurious, committed to culture and the arts**. There is a high importance of **exclusivity**. Britain stands for a lot of things to luxury travellers; most prominently **'historical', 'royal' and 'traditional'** on a spontaneous level.
- 2** Nearly 60% believe **shopping** is usually an important component of their luxury holiday, and those in Gulf and China believe Britain largely meets their shopping needs.
- 3** **92% have Britain in their bucket list.** Half of the travellers we spoke to plan to visit Britain with in the next year or two, especially the Chinese. The time of the visit is most popularly between July to September, the peak summer holiday season.
- 4** **Accommodation and authentic** experiences are essential to any luxury holiday. **Local food** experiences are a key winner. **5-star hotels** are the most popular accommodation facility used in Britain. Chinese also show a higher preference for **stately homes and castles**.
- 5** Part of the travel experience is the **joy of planning** for potential holiday destinations. Planning a holiday is a **meticulous process**, involving various steps. **Weather** and **accommodation** are the most important influences in decision making process.
- 6** **Customisation** is critical. Cultural experiences, VVIP treatment, perhaps exclusive visits to football clubs and a touch of royalty are popular.

Recommendations

- 1** **Be their guide** – All respondents are looking for inspiration and something **unique** (*Many cannot even articulate what 'unique' is, just want something unexpected*). Experiences that others didn't easily have access to so they can show off. Mention places less known and showcase experiences and opportunities to achieve this with travel in Britain.
- 2** Opportunity to promote Britain prior to travelling but also whilst they are in Britain. Have as many **touch points** with ideas as possible within Britain too which showcase luxury and unique experiences including options of travelling to the location. There is overall a **lack of knowledge** on things to do in Britain.
- 3** Highlight areas of Britain which are secluded, exotic, off the usual tourist map and offering **something different** that is worth paying a lot of money to experience. **Food and accommodation** must be highly featured. **Emphasis on uniqueness and exclusivity** in experiences, accommodation, travel options that are purely for the rich. Want to feel they are experiencing something truly **genuine and unique** and not accessible to everyone.
- 4** Focus marketing appropriately to each region – see next slide for a summary of market differences. To **US**, Britain can be a luxurious destination for unique and authentic experiences. For **China**, the focus should be castles, royalty and culinary delights. For the **Gulf** travellers, extreme luxury and personal VVIP service at every touch point.
- 5** Being able to **customise itineraries** is key. There is a need to showcase a high level of **flexibility**. Britain needs to showcase opportunities for a luxury experience which can cater to individual needs and offer something out of the ordinary which is **not accessible to all**.

Key differences between markets

- 1 Uniqueness vs ultra-personalisation** – All respondents are looking for relaxation and something unique. However **Gulf** respondents go further when looking for their next luxury destination and planning their trip: **personalised tours and unique luxury experiences are essential.**
- 2 Image of Britain** – Both Chinese and US respondents associate Britain highly with classic, royal attributes. Nevertheless, the appeal of that image translates differently in each market: **Chinese** luxury travellers would be **interested in itineraries that include royal buildings** and exceptional experiences linked to these. They are also the **most likely to want to stay at historic houses or stately homes**, while the other markets might fear that those lack some attributes of modern comfort. The Chinese are also **more interested than others in the university cities**, which hold a luxury appeal to them.
- 3 Shopping** – Each market has different shopping requirements: luxury travellers from the Gulf are more likely to prefer a personal shopping experience, where their extended group of travel can meet up together in a more private environment, while those from China are more likely to search for a bargain in a luxury outlet village, and those from the USA will prefer shopping in luxury department stores or flagship stores.
- 4 Independence vs guidance** – The American luxury travellers are more likely to book the elements of their luxury trips separately, with flights and accommodation directly booked directly with the providers, while Chinese and Gulf travellers are more likely to buy a package: they need more guidance and reassurance. While US travellers are open to following the advice of locals they meet during their trip, Chinese travellers will heavily rely on their local guide for tips. Concierge services are the most essential item defining a luxury trip for wealthy Gulf travellers, who are also the more likely than other to follow friends' and family's recommendations, as well as suggestions from their travel agency or the official tourist centres for legitimate and trustworthy information sources.
- 5 Booking patterns** – US and Chinese travellers are more likely to book their luxury trip themselves online whereas Gulf travellers are more likely to use a personal assistant and confirm their booking over the phone: those different communication channels have to be taken into account when choosing trade partners, as well as what they might book before or after their trip. US travellers are earlier bookers than most and the Chinese book closest to the date of travel.

Key differences between Mass Affluent and High Net Worth segments

1

Luxury definitions – All respondents are looking for unique experiences that show the authenticity of their luxury destinations. However, their conceptions of luxury differ slightly. The **MA group tend to define a luxury trip by the uniqueness of their activities and the place they stay at**, they need to relax and unwind and so factors such as the weather are very important to them. However, **HNWs look for a more holistic experience** where everything should be of premium quality from their five star hotel they stay at and their facilities, to their transport and food options: they are seeking a (V)VIP experience that goes beyond their expectations.

2

Britain appeal and opportunities – HNWs tend to associate Britain with a luxury trip more than they would France, when prompted, while MA respondents tend to pick the latter more often. The types of British events that appeal to both groups is also quite different: Wimbledon appeals more to HNWs than the MA travellers who would prefer events marketed to a larger audience and are based on experiences, such as the Edinburgh Festival or Taste of London. HNWs also intend to stay longer in Britain and there seem to be more opportunities for marketing places outside of London, and visiting in the shoulder seasons for this group than for MA.

3

Shopping – MA and HNW travellers are not looking for the exact same shopping experience: HNWs have a slightly higher propensity to visit luxury department stores and to search for personal shopping experience, while MA holidaymakers are more likely to go shopping in high-street stores and outlet villages. In Britain, HNWs are also more interested than others in buying niche articles, such as antiques or art pieces, but also clothing and footwear, especially for men.

4

Independence vs guidance – Both luxury segments' choice for their next luxury destination is highly influenced by word of mouth, or direct recommendations. This is even truer for the HNW group. Once that choice is made, however, they do not look for information and inspiration in the same way. If both use website and apps, HNW holidaymakers might follow word-of-mouth by trusting advice from locals met at destination, while MA tourists will rely more on their hotel concierge and the people they travel with.

5

Some different booking preferences – Some similarities exist in the holiday booking patterns of both MA and HNW groups. For example, both are more likely to book online themselves than through another method. Nevertheless, HNWs are more likely to book by phone or through their personal assistant (1-in-5 or more for each) than the MA travellers (fewer than 1-in-5 for each). HNWs are also more confident than MA travellers in booking the main elements of their trip separately, and slightly later on average.

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Defining Luxury



Accommodation and authentic experiences are essential to any luxury holiday.
Local food experiences are a key winner.



Amazing **experiences** and luxurious **relaxation** which goes beyond the expected. Luxury means everything feels **seamless**, with no hitches in the way and nothing to worry about in order to have a truly relaxing experience.



Exclusive and highly meaningful experiences which reflect the country's **culture**. Tailored and **small groups** with a Chinese speaking guide allowing them to experience **high level comfort** when travelling.



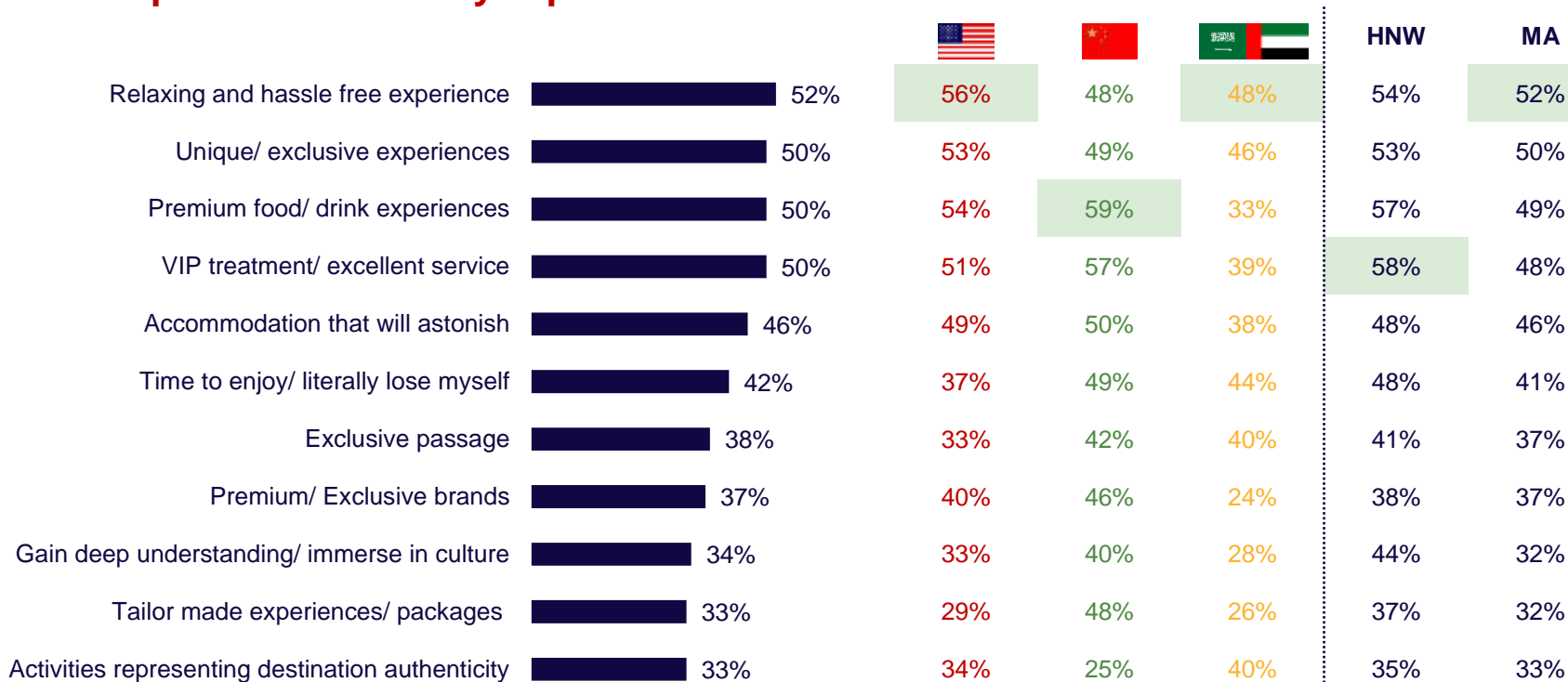
Personal high level exclusive service at every touchpoint. Private tours and shopping trips are a must. Genuinely lavish and **VIP experiences** with no queues and exclusive access. Travel must encompass extremely **personalised tailor made** service.

Experiences
Relaxed & hassle-free

Experiences
Premium food & drink

Experiences
Relaxed & unique

A relaxing hassle free experience closely followed by unique, VIP and premium treatments are the **top traits of a luxury trip.**

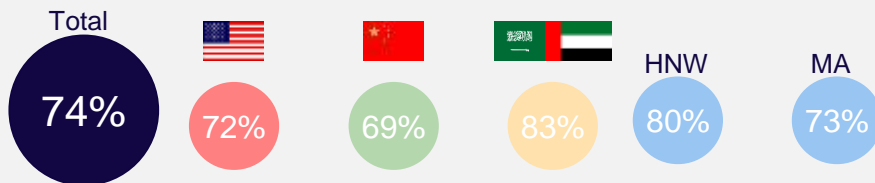


L1. Which of the following define 'luxury trip' for you? Please select as many as you like. Total (n=953), USA (n=453), China (n=249), Gulf (n=250), HNW (n=153), MA (n=800)
 Only items picked by over 30% of all respondents are shown here.

Accommodation takes the prime position as being an **important element for a luxury travel experience**, resonant across all markets and segments, although transportation is significantly more important to the HNW group than the MA one.

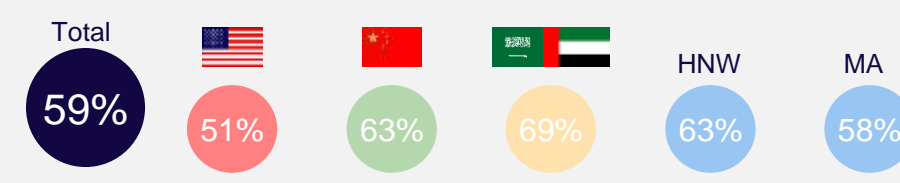
Accommodation

Top box %



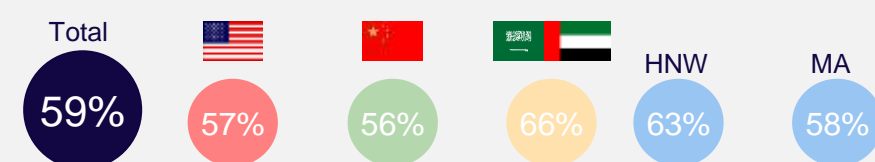
Activities

Top box %



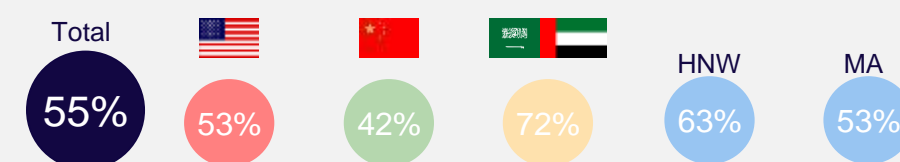
Food & drink

Top box %



Transportation

Top box %



Luxury accommodation is all about **superior service and a unique offering.**

- The hospitality industry's hotel star ratings are a good start to finding accommodation but with social media, respondents find even this can be misleading and confusing. Online reviews quickly reveal that even some five star hotels can let service, food or facilities slip.
- HNW and MA are seeking accommodation which has a sense of personality, a feeling of intimacy, a connection to the country visiting and most importantly **superior** service and **attention to detail**.
- Essentially the accommodation needs to **encourage complete relaxation** and every whim to be taken care of smoothly.



It's all about the details when I stay in a hotel. The service needs to be meticulous and given I live normally close to a 5 star hotel, I expect so much more when I travel. Things in the hotel -universal electric adaptors, accessories case, iPhone charger.

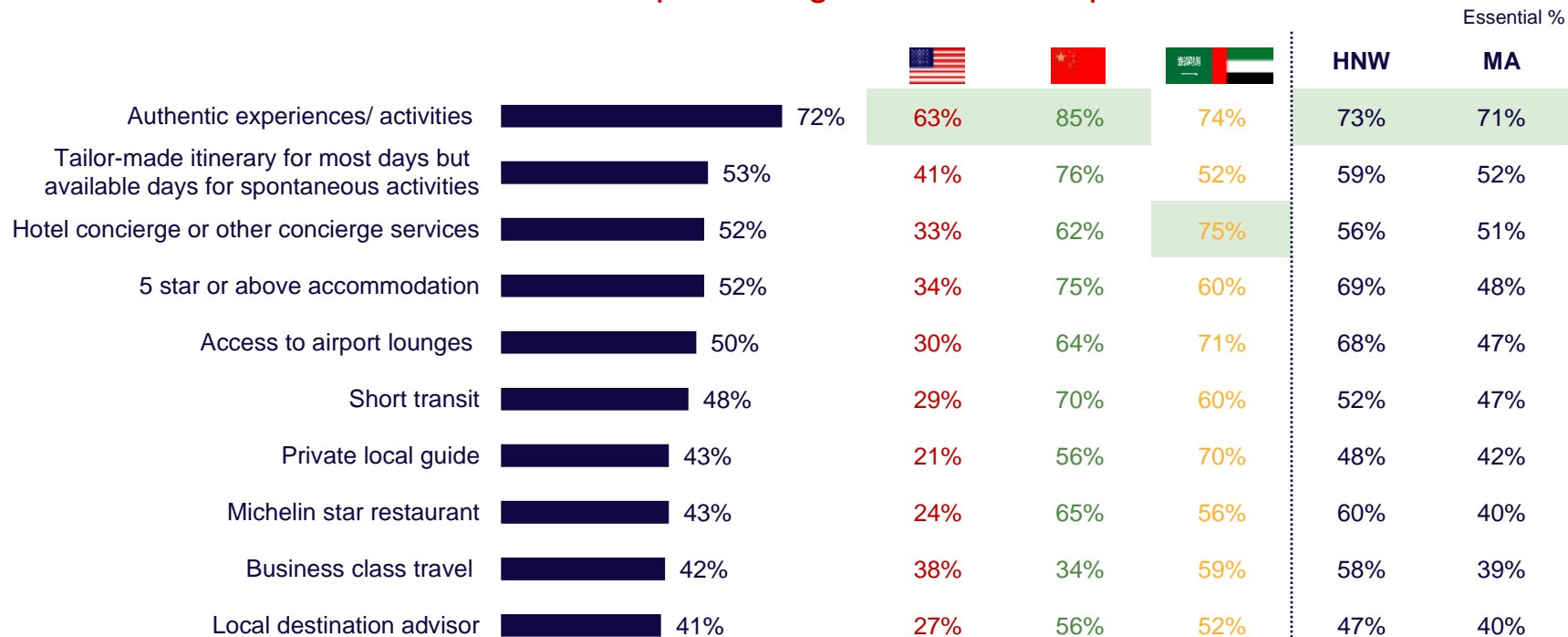
HNW – US, Male, 47, West



The staff referred to me and my family by name – felt like they know me and I felt important.

MA – UAE, Gulf, Male, 39

Authentic experiences by far top the list for a luxury holiday essential... although concierge services are higher up for Gulf travellers.
5 star accommodation and access to airport lounges are more important for HNWI's.



L3. When thinking about luxury travel, which of the following do you find essential? Total (n=953), USA (n=453), China (n=249), Gulf (n=250), Gulf (n=250), HNW (n=153), MA (n=800) 17
Only items picked by over 40% of all respondents are shown here.

Authentic experiences and activities which are stress-free and personalised.

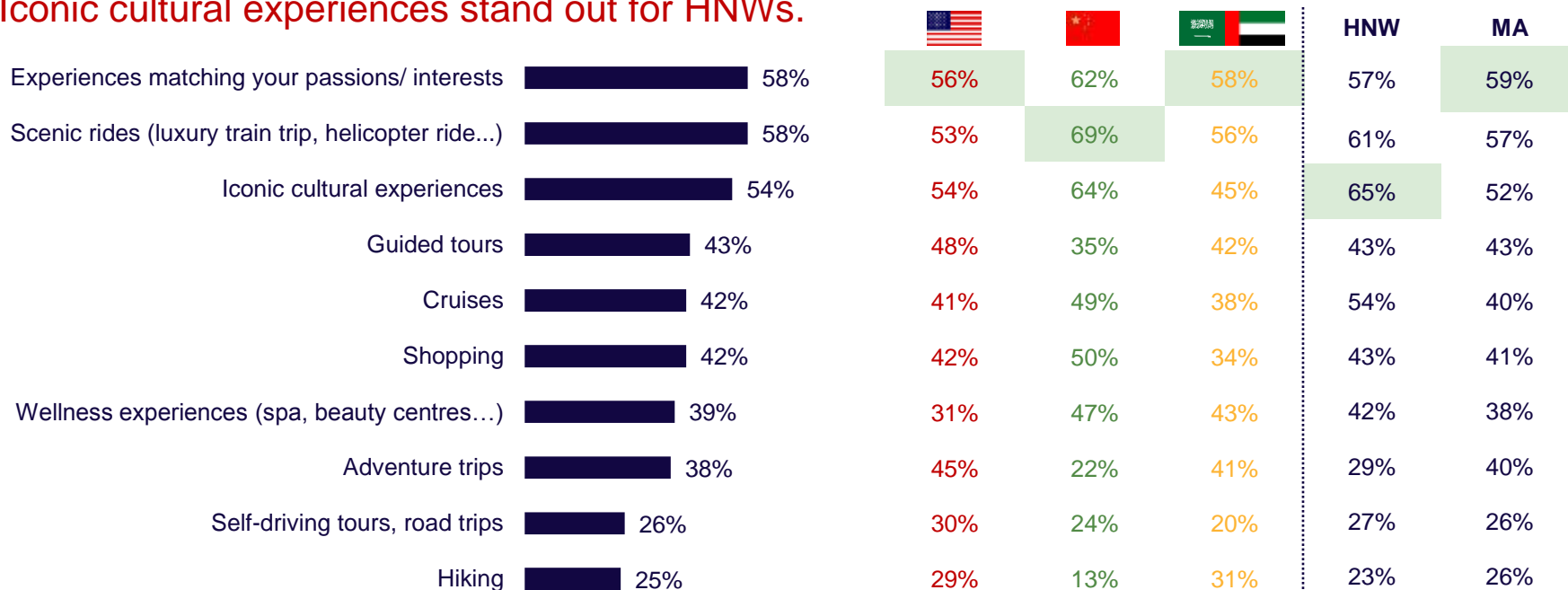
Must haves

Why

Tailored experiences	Ability to customise itinerary to personal taste
Tours must be in small groups (or individual for HNW)	No rush – want to enjoy and prefer private guide
Tours should include high end activities	No queueing – need to feel as a VIP
Develop new knowledge and experience self growth	Desire to learn about other cultures, customs, sports and the arts
Hotels would offer suites for some be 5 star minimum	Genuinely lavish and all-round superb hotel
Hotel with good concierge who refer to them by name i.e. very personal service	Ability to book private travel and achieve restaurant reservations when full to general public
Knowledgeable guide must speak their language	Guide to be well versed in the country, flexible, professional and keen to give them a good experience

Luxury holidays usually include indulging experiences that allow travellers to either pursue their passions and interests, or to relax and unwind. Only US travellers seem to prefer active luxury holidays to a visit to the spa, a cruise or a shopping session.

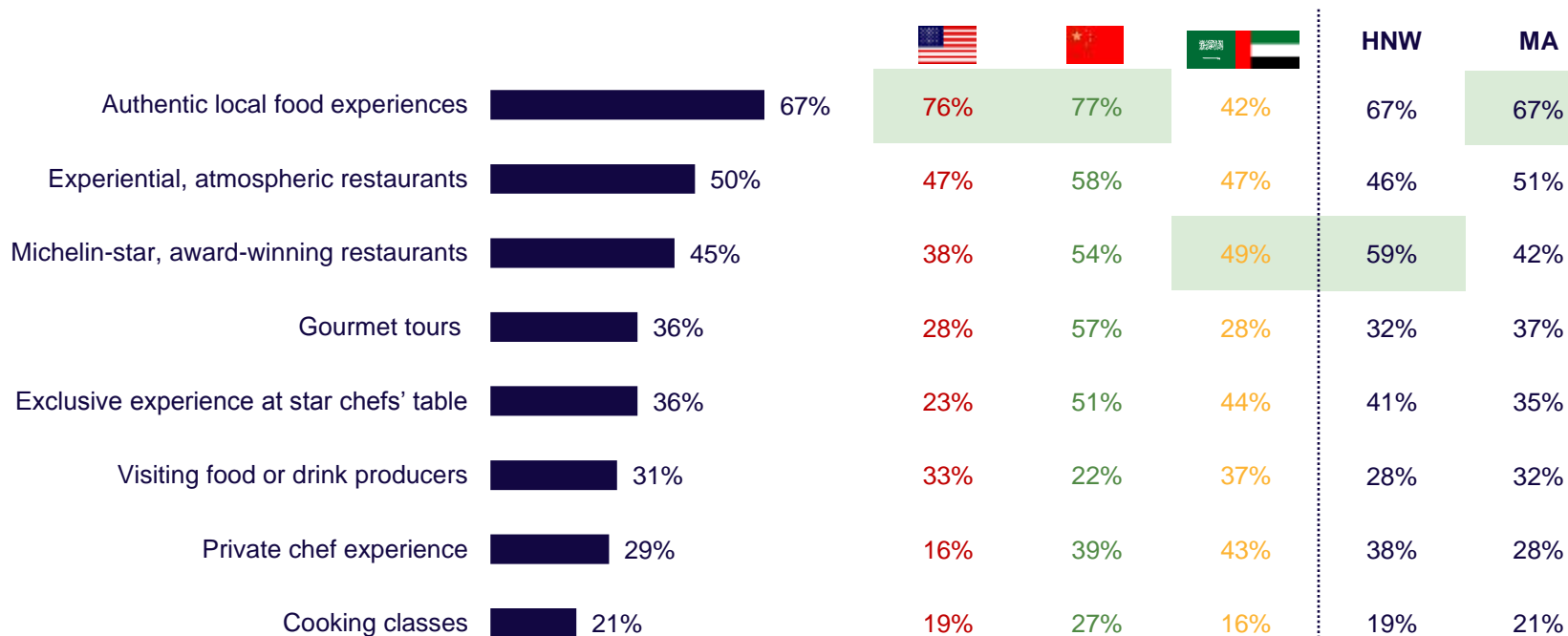
Iconic cultural experiences stand out for HNWs.



L4b. What types of experiences do you like including on a luxury holiday? Total (n=953), USA (n=453), China (n=249), Gulf (n=250), HNW (n=153), MA (n=800)

Only items picked by about 25% or more of all respondents are shown here.

When considering **food and drinks on a luxury holiday**; local food experiences definitely tops the list for US and China. Michelin-star restaurants being on top for Gulf, as well as for HNW, for which a private chef experience is also more popular than for MA.



Exquisite dishes made by some of the finest chefs in the world.

- Decadent dining events, Michelin-star and luxurious drinks experiences are highly sought after and favoured by all respondents
- Expectation when booking a holiday is that there will be an opportunity to experience award winning restaurants and exquisite dishes made by leading chefs which can cater to individual dietary needs without too much trouble
- Gulf respondents in particular emphasise the fine dining experience to be delivered by private chef for them only
- Cuisine is very important with Chinese respondents and many like to photograph and show their friends back home what local food they eat on holiday

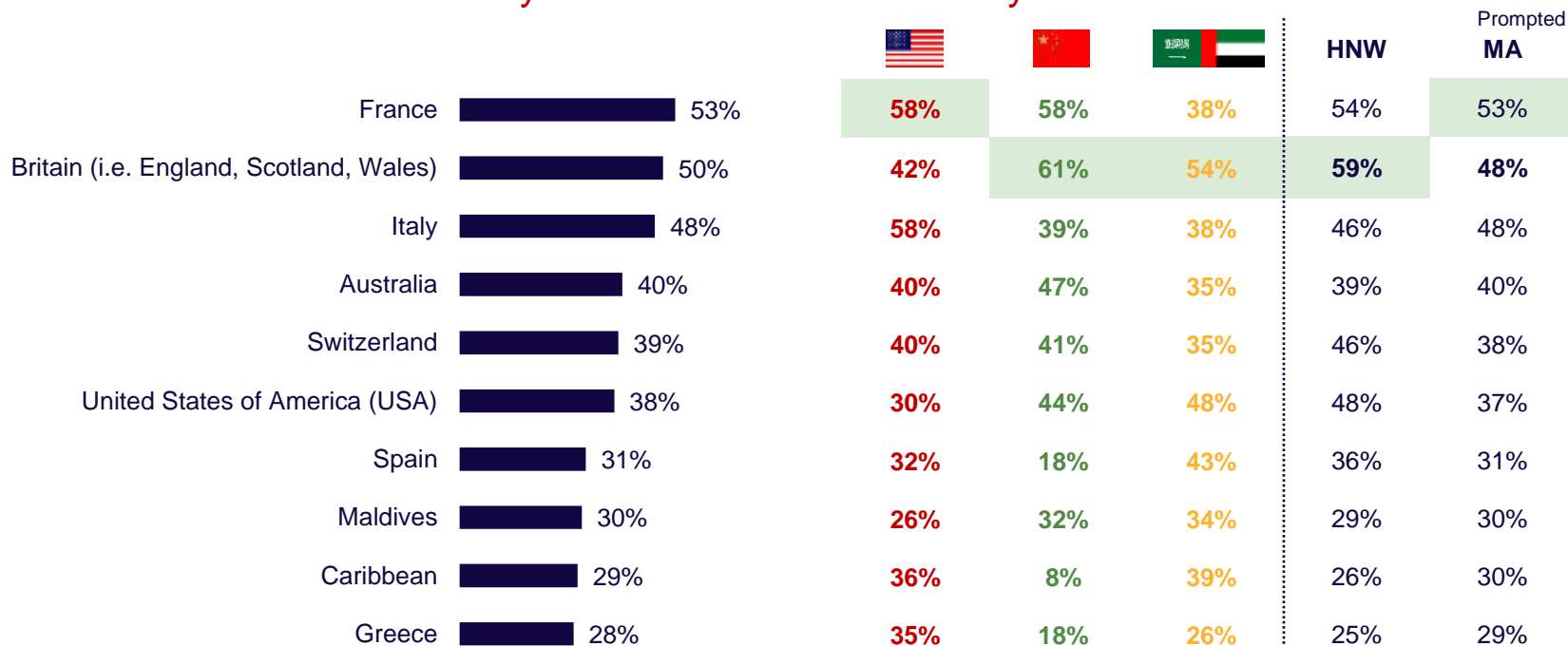


I like to try different cuisine when I travel and enjoy when the dish is as beautiful to look at as well as delicious to eat.
HNW– China Female, 25 East Shanghai



I like to have a private chef for my family so we can enjoy a meal catered exclusively for our taste.
HNW – UAE, Gulf , Male 50

Britain even comes first of the destinations that are most commonly perceived as luxury destinations for Chinese and Gulf respondents.
HNW travellers are also more likely to consider Britain a luxury destination than France.



L6. And which, if any of the following destinations/ countries would you consider as luxury travel destinations? Total (n=953), USA (n=453), China (n=249), Gulf (n=250), HNW (n=153), MA (n=800). Only top 10 items picked by all respondents are shown here.

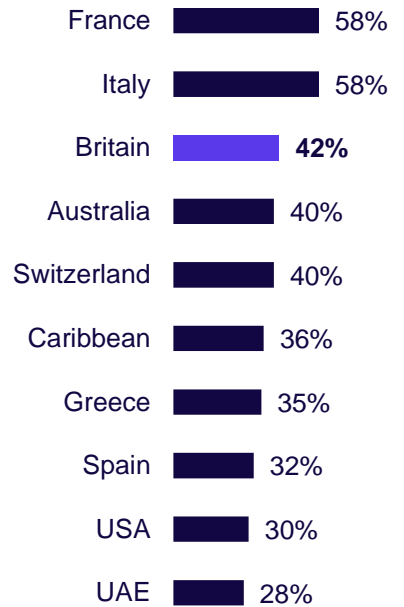
Among **US travellers**, France and Italy top the list.



Spontaneous Mentions



Prompted mentions



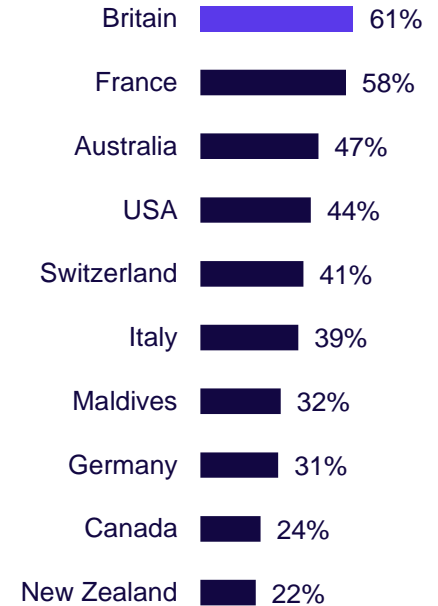
Among **Chinese travellers**, Britain and France feature on top of the list spontaneously.



Spontaneous Mentions



Prompted mentions



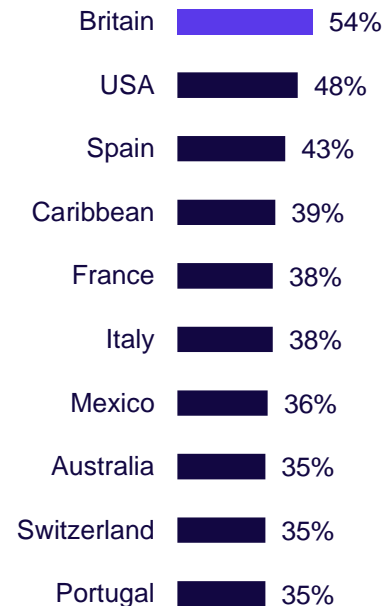
UK and US are the top 2 destinations mentioned for luxury travel by the **Gulf travellers**.



Spontaneous Mentions



Prompted mentions



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Planning for holiday





Part of the travel experience is the joy of planning for potential holiday destinations.



Love exploring by themselves, researching to the best of their abilities using travel magazines, blogs and word of mouth for inspiration. **Recommendations from family and friends** feature highly in location decisions. All about having an exciting experience and vital to have convenience getting around as well. At the forefront of all plans is to have the feeling of being **relaxed**



Enthusiastic readers of National Geographic, Conde Nast Travel magazines, Ctrip, Trip Advisor and numerous forums and online travel blogs for inspiration. Safety concerns make small **intimate group** tours appealing and look towards ability to customise to meet their expectations



Gulf travellers appreciate **customisation** and meticulous planning especially around family needs. They wanted to be treated like a king on their holiday. Tech savvy and plan all their holiday requirements online. The actual booking may or may not be completed online Recommendations from **friends, family** places a key role in choosing a destination.

Relaxed

Recommendations

Enthusiastic

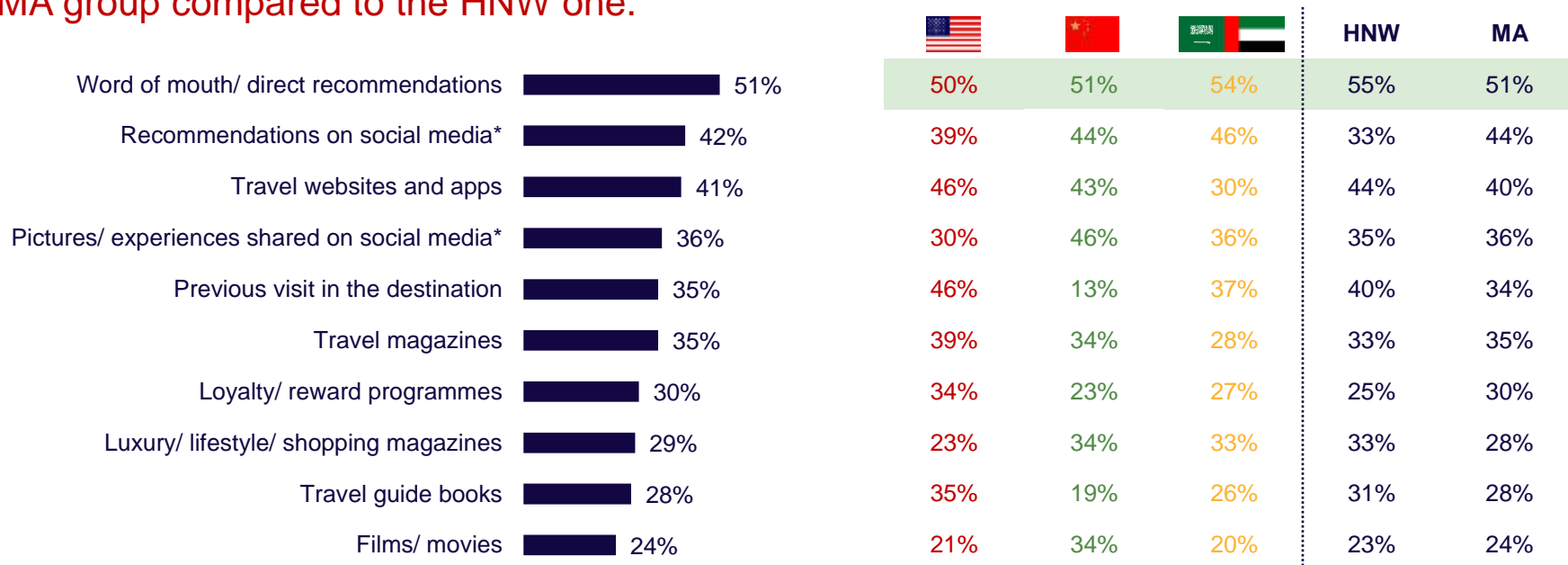
Customise tours

Endorsements

Customised

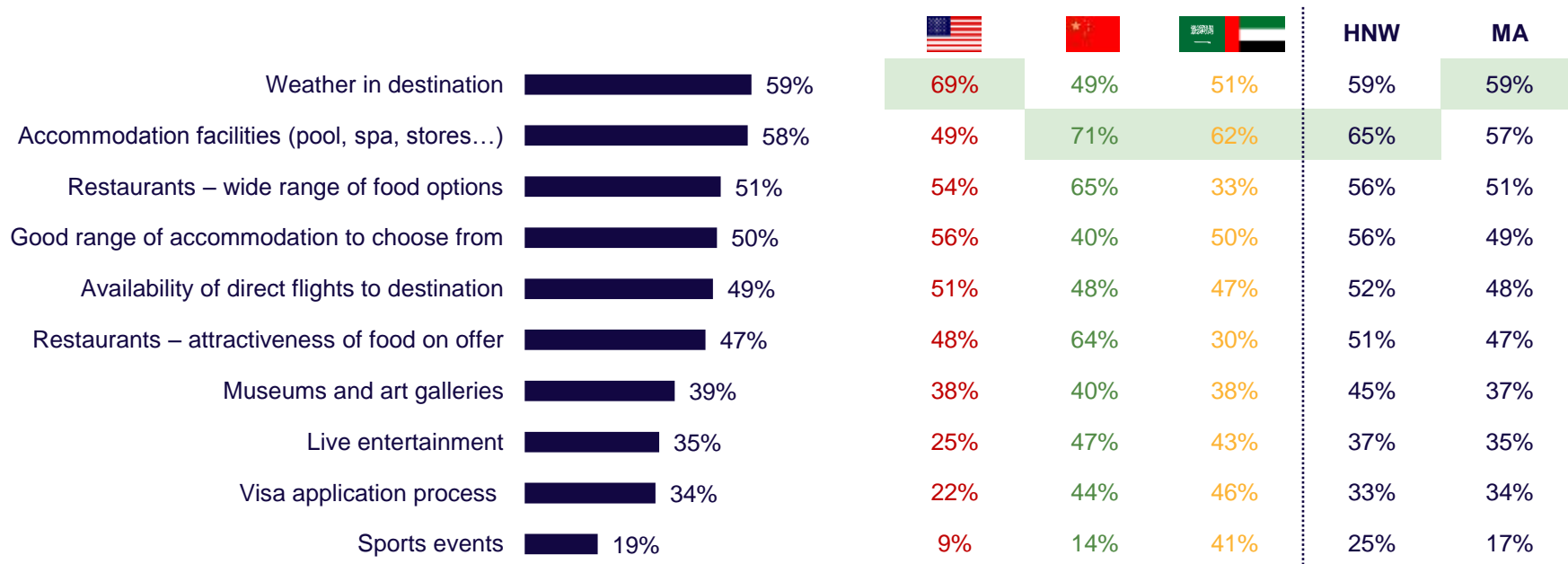
Inspiration is usually driven by word of mouth and direct recommendation across the board; China does feature a higher social media influence.

Direct recommendations on social media are also significantly more important among the MA group compared to the HNW one.



P1. Which of the following sources, if any, would inspire you for your next luxury travel? Please choose as many as apply – Total (n=953), USA (n=453), China (n=249), Gulf (n=250), HNW (n=153), MA (n=800). Only top 10 items. *Recommendations on social media are a direct inspiration rather than pictures/ experiences that were shared are a more passive way to inspire travellers and influence their destination choice.

When **considering a luxury destination**, weather is a top priority for US travellers and it is equally important for MA and HNW groups, whereas HNWs, Chinese and Gulf respondents prefer destinations that offer the facilities they want with their accommodation.



Weather and accommodation are the most important influences in decision making process.

- All respondents plan around seasons and the need for good weather and activities which reflect time of year.
- Chinese and Gulf respondents prioritise extravagant accommodation, then it's closely followed around the weather at the destination and how it reflects the best things to do in the desired country.
- Britain lower on list of immediate priorities as many have previously visited, some see luxury as more beach holidays and weather is not perceived as optimum most months. However all do feel a pull to see more of Britain and what it has to offer.
- Chinese and Gulf respondents prioritise extravagant accommodation, then it's closely followed around what is the weather at the destination.



Planning my travel is connected with the weather in the location. I don't want bad seasons to ruin our experience and I want to enjoy our lavish surroundings so I consider these things when booking.

HNW – KSA, Gulf



For me, it is the destination and season which defines the travel, and mostly, travel season should be as per the local countries best weather to visit, I will always check on the internet best time to visit. and what activities you can do there at those times.

MA – UAE, Gulf



Britain must do more promotions in China and let us know best time to travel weather-wise. I don't know much at all about Britain.

HNW – (East) Shanghai, China












Obviously I wouldn't take a cruise or go maybe to London when it's always raining, or something of that sort. I'd like the weather to be good for me, and as I have no children, I like to travel when the kids aren't out of school.

MA – USA (West)

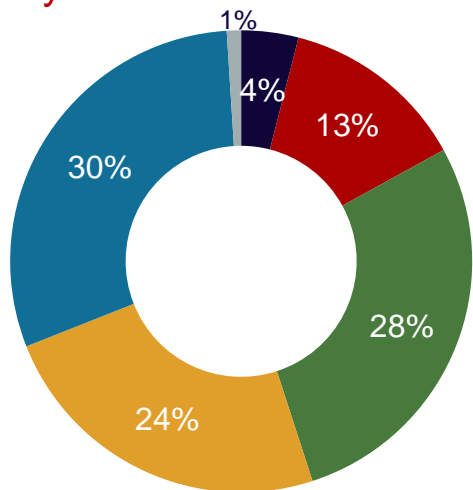
The **most popular companion** on luxury travel tends to be a spouse/ partner. Travelling with children is more common among Gulf travellers. Many would also travel with friends.




Top 2 boxes: always/ sometimes

						HNW	MA
	With spouse/partner	94%	92%	94%	98%	97%	94%
	With friends	80%	77%	75%	88%	80%	79%
	With other adult family members	74%	70%	67%	87%	72%	74%
	With children aged under 16	58%	36%	69%	88%	57%	58%
	Part of an organised tour group	58%	39%	72%	79%	59%	58%
	On your own	47%	43%	49%	51%	47%	47%

Overall, just under 1 in 3 **book their flights 3+ months in advance.**

Americans plan a lot further in advance than China and Gulf, overall luxury travellers tend to book in advance compare to the general travellers because they want to make sure what they want will be available*, especially the MA group.



				HNW	MA
Up to 2 weeks before travel	3%	7%	1%	4%	4%
2 – 4 weeks before travel	6%	26%	12%	14%	13%
A month – 2 months before travel	13%	42%	39%	35%	26%
2 – 3 months before travel	26%	17%	27%	18%	25%
More than 3 months before travel	50%	6%	18%	28%	31%
Don't know	1%	1%	3%	1%	2%






I like to plan....70% of items should be booked already in China. The remaining 30% may be done within the destinations via the official websites of the specific attractions or via the help provided by the hotel staff. I always use 2 months to plan ahead of a travel. Even we go for group tour, I would also like to plan 2 months ahead to see which tours can be available I don't want to have to compromise.

HNW – China (23years) East (Shanghai) Female*

US travellers **usually book their travel and accommodation separately**; whereas in Gulf and China it tends more to be a package deal with other elements added on.

There is little difference between HNW and MA travellers on the method of booking, but MA would prefer a package to just booking airline and accommodation together, while HNW seem to be looking for more flexibility.




	Total				HNW	MA
Transport and accommodation separately	49%	69%	31%	31%	54%	48%
Package - Airline, accommodation, other elements	36%	16%	48%	60%	31%	37%
Airline and accommodation together	34%	21%	42%	49%	37%	33%



I would try to make all the possible bookings via internet when I am in China before departure. However, such planning may sometime cause issues because we are not really familiar with the local situation of the destination. For example, in our last trip to Australia, I underestimated the time to be spent in travel and we missed staying in a hotel for one night - we used the whole night for travelling! Therefore, we really need to check carefully about the feasibility of our original planning with local guidance. I find package deal if I customise is the best solution and most relaxing way to plan.

HNW - South Central (Guangzhou) China*

In US and more so in China, the **booking is made by the respondent themselves**. Gulf travellers would more likely get help from their personal assistants; HNW travellers will also be significantly more likely than MA to book their trip through them.

	Total				HNW	MA
Yourself	66%	74%	90%	28%	62%	67%
Those travelling with you	17%	19%	10%	22%	14%	18%
Personal assistant	14%	4%	<1%	46%	20%	13%

Gulf HNW*




Booked via reputable high end agencies via their personal assistant or home office staff. Customisable experiences are very important and they do not want to mix with any other travellers. It is all about personal adventures and shopping and book to cater for these.

Gulf MA*




Self-booking online via reputable travel websites and companies. Usually booked by partner. Brands are very important and actively sourced when booking the trip.

A direct booking is preferred in US. In China, a luxury travel agent is the most popular mode of booking. Gulf travellers use a mix of modes: luxury travel agent, specialist local agency or a corporate travel agent are all popular.




There is very little difference between the HNW and MA groups on the booking mode.

	Total				HNW	MA
Directly with accommodation/ transport	39%	69%	20%	5%	37%	40%
Through a luxury travel agent	25%	10%	46%	32%	25%	25%
Through a corporate travel agent	12%	4%	12%	27%	12%	12%
Through a local or specialist agency in their area	13%	4%	15%	28%	15%	13%
Through another travel agent	6%	6%	3%	7%	7%	6%

Online is the **most popular booking mode** in US and China; Gulf travellers prefer the phone. Booking via the phone is also significantly more popular among the HNWs in comparison to Mass Affluents, but both groups would still most likely book online their next trip.

	Total				HNW	MA
Online	65%	79%	82%	21%	58%	66%
Direct visit to travel agency/ provider	14%	9%	15%	21%	11%	14%
Over the phone	17%	11%	3%	41%	22%	16%
Other	4%	<1%	0%	14%	7%	3%

Most luxury travellers always prefer to plan their holiday itinerary in advance of travelling, but in the Gulf where travellers tend to sometimes plan it beforehand.

Before the trip: % of respondents that would...	Total				HNW	MA
Always prefer to plan their holiday itinerary	57%	57%	82%	31%	59%	56%
Sometimes prefer to plan their holiday itinerary	40%	42%	18%	60%	39%	40%
Do not prefer to plan their holiday itinerary	3%	2%	1%	9%	2%	4%



While I enjoy discovering while I am there, I also like to know that I won't be having any pitfalls ahead of time because everything has been planned well. I do the research with my wife and then we put our trust in an agent
MA – USA North West, Male, 29*



I've made my pre-agenda of what I'm intending to hit, ...difference between good and great is that good would mean I did everything I anticipated; great would mean I did even more, or had some really spectacular experience that I wasn't expecting.
HNW – USA, Midwest, Male, 50*

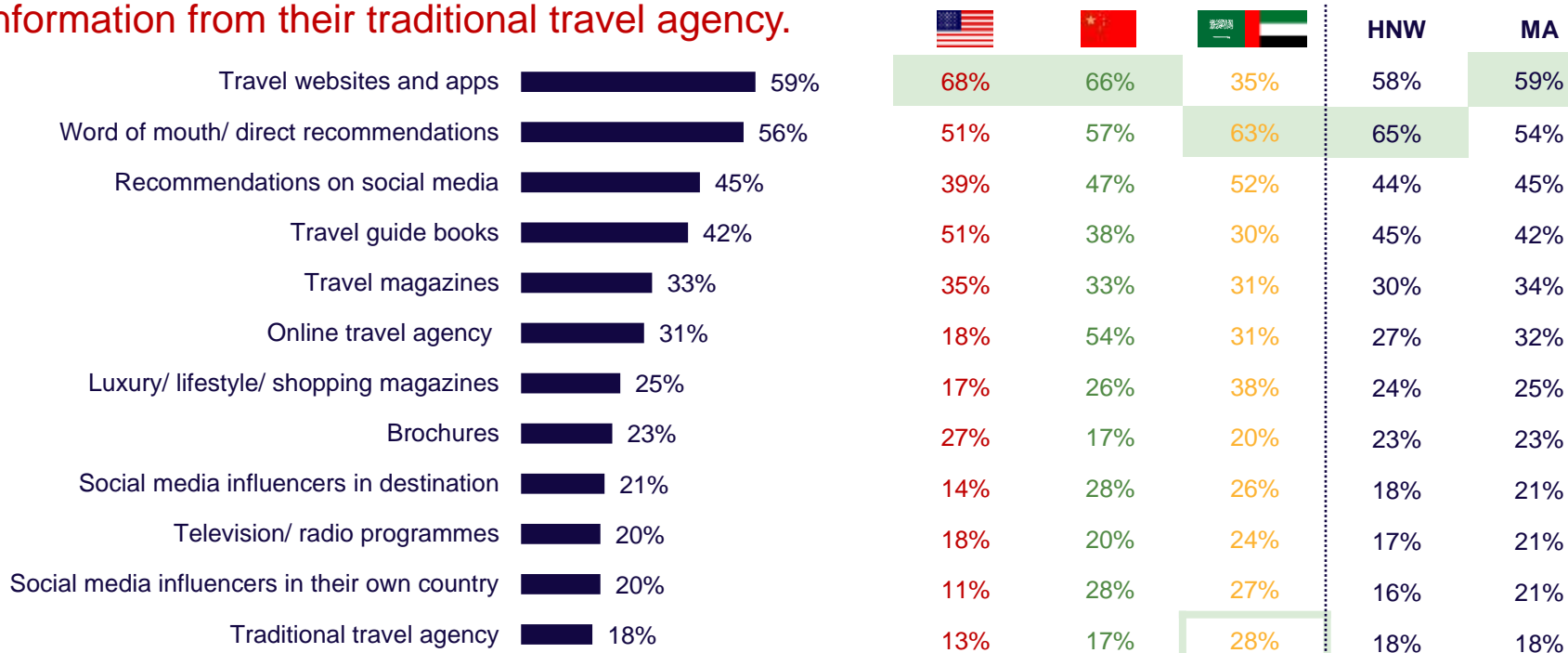


If we going for 10 days we will have a planned itinerary for 6-7 days and the rest would be to explore something new I haven't seen or heard about before
HNW – Gulf, UAE, Male, 41*

All the accommodation is **booked in advance** for the majority of travellers, as is transfer from the airport to accommodation for the Gulf travellers, and internal transport among the US ones. Restaurant bookings and day trips are more commonly booked during the trip. Over a third of respondents did not plan on booking a chauffeur-driven car or hiring a luxury car.

		Total	USA	China	Gulf	HNW	MA
All accommodation	Pre	81%	88%	80%	68%	78%	81%
	During	15%	7%	16%	27%	17%	14%
Transfer from airport to accommodation	Pre	69%	71%	54%	79%	71%	68%
	During	22%	16%	34%	21%	20%	23%
Transport at destination	Pre	67%	75%	54%	65%	69%	67%
	During	26%	15%	40%	34%	28%	26%
Some of the accommodation only	Pre	59%	64%	46%	61%	64%	58%
	During	29%	19%	42%	36%	25%	30%
Activities	Pre	45%	41%	45%	51%	42%	45%
	During	47%	45%	49%	47%	47%	47%
Day trips to specific locations	Pre	44%	42%	34%	56%	45%	43%
	During	50%	50%	56%	44%	51%	50%
Chauffeur-driven car	Pre	37%	26%	32%	63%	46%	36%
	During	28%	18%	45%	31%	24%	29%
Luxury car hire	Pre	32%	25%	31%	44%	37%	31%
	During	32%	18%	45%	44%	25%	33%
Table at specific restaurants	Pre	29%	23%	25%	44%	35%	28%
	During	51%	54%	56%	42%	48%	52%

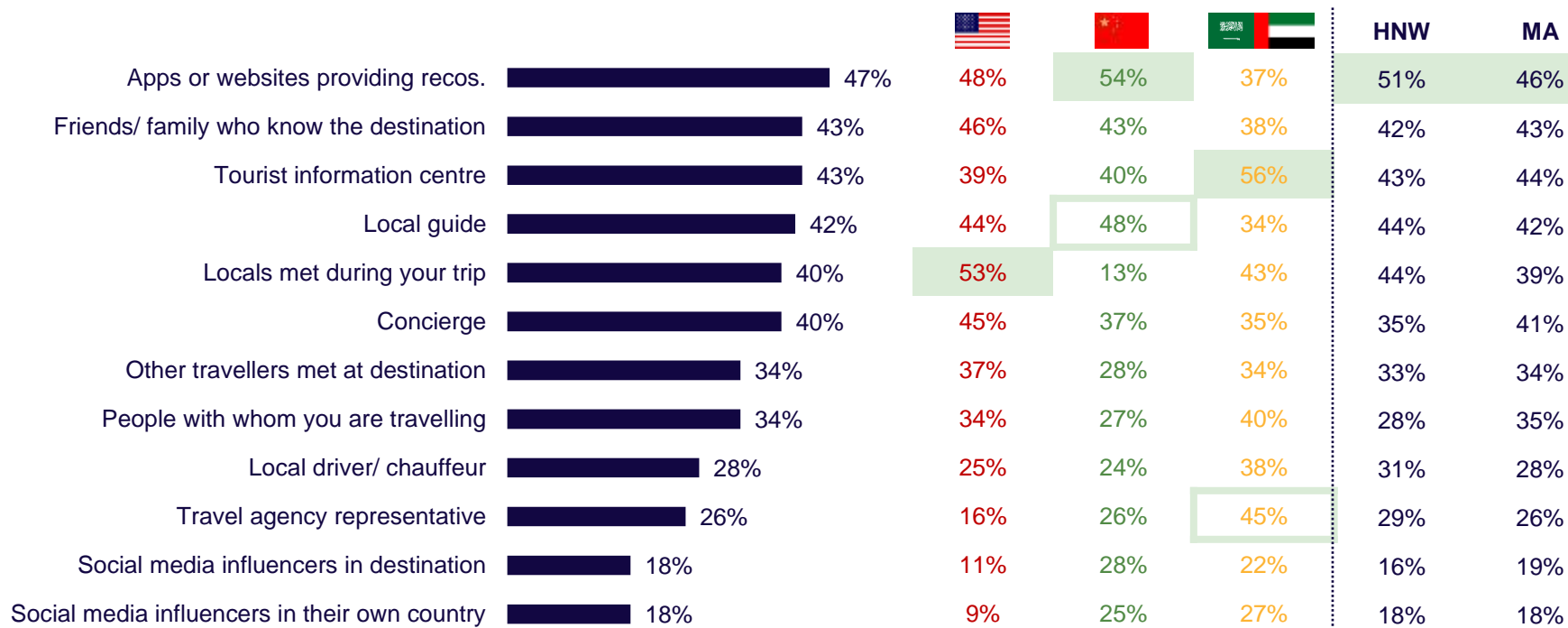
Before travelling, travel website and apps are the most popular sources of information in the USA and China, but word of mouth and direct recommendations will be preferred in the Gulf and among the HNW group in general; Gulf travellers are also more likely to listen to information from their traditional travel agency.



P7. After deciding on the destination and before travelling, which, if any, of the following sources of information do you use to find out information about your destination?

Total (n=953), USA (n=453), China (n=249), Gulf (n=250), HNW (n=153), MA (n=800)

In the destination, online sources are still popular sources of information; but tourist information centres and friends/family with knowledge of destination are also used.



KANTAR MILWARD BROWN



Opinion of Britain



Britain needs to showcase opportunities for a luxury experience which can cater to individual needs and offer something out of the ordinary which is not accessible to all.



Privacy and **exclusivity** with attention to detail in all touch points. Like the castles and royal elements to Britain as well as the history all offer appeal to the US respondents. *“ I want different food not stereotypical fish and chips and overall a cultural, historical experience linked to modern day” HNW*



Love all things **historical** and **Royal**. Britain perceived positively as being **grand** and **luxurious**. *“I want to experience its nobles’ history/enjoyment, life of royal family, castles as well as butler-styled services.” MA*



Desire to try something **new**, something **innovative**, something **unexplored** and yet **luxurious**. Not a lot of knowledge of Britain – mainly aware of London. Would like to see more information. *“Britain should focus more on outside London; I think when we think of Britain, London is the first and last thing that comes to my mind. In a way it is good and bad” HNW*

Exclusive
Royal & historical

Luxurious
Noble & grand

Experiences
Innovative & unexplored

Britain stands for a lot of things to luxury travellers; most prominently ‘historical’ and ‘traditional’ on a spontaneous level.



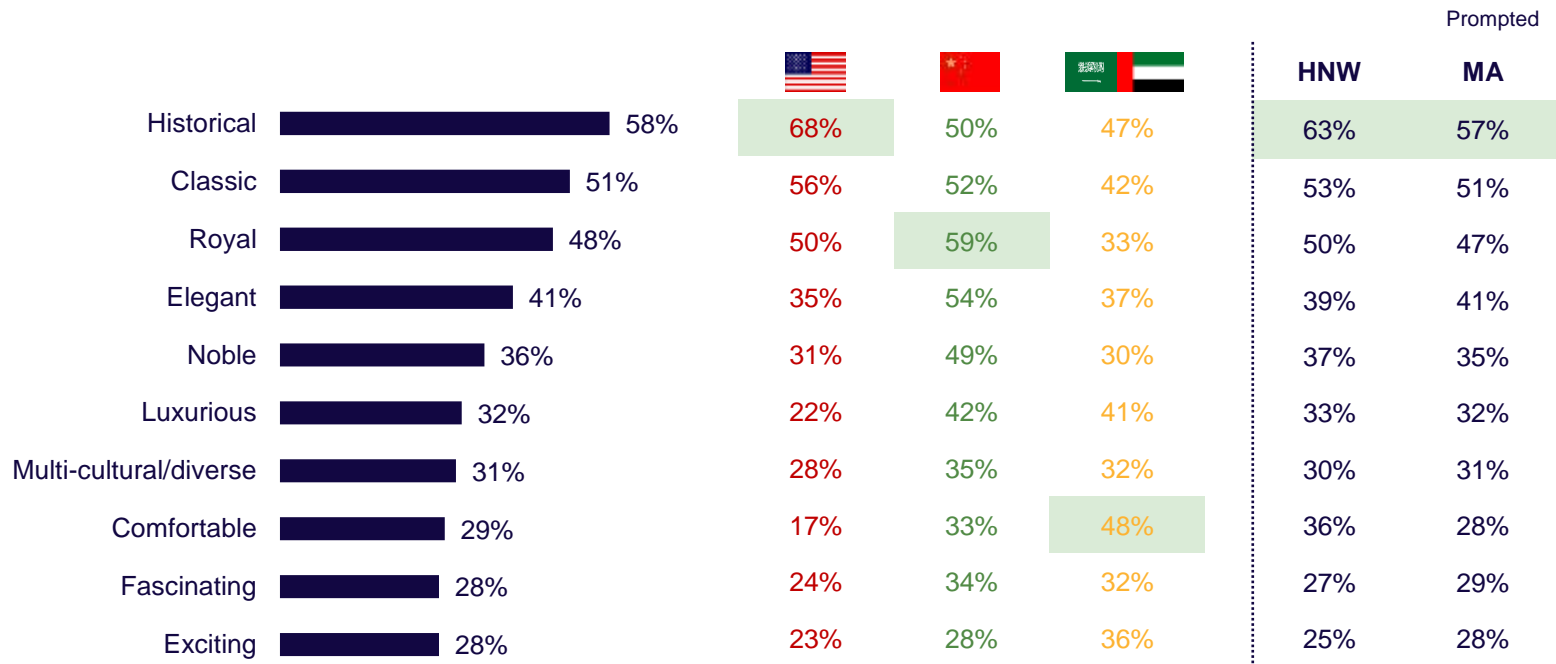
Britain stands for different things to different nationalities...

Spontaneous



B1. Thinking of Britain as a luxury travel destination, how would you describe it? What three words first come in mind? USA (n=453), China (n=250), Gulf (n=250)

On a prompted level, **‘historical’**, **‘classic’** and **‘royal’** are the top three words picked to describe Britain.



Perceptions of Britain are positive with a view of being luxurious, committed to culture and the arts all favourable to respondents.



The culture is very similar to Los Angeles, in my opinion, besides the fact that it's raining all the time over in Britain. But, yeah I definitely felt like it met what I expected it to be. Some of the food places, if you don't plan where you're going to eat, I feel like a lot of places are tourist traps because the food's not that good. But they also have their restaurants that are substantially better than an average restaurant too

MA – USA (West)



The first thing if I close my eyes and think about Britain is the Queen – the aristocracy, luxury, grand, it's all royalty which comes to my mind

MA – UAE, Gulf



The city of London itself we find to be a luxurious city, just because of all the history, the culture, the architecture, the language of the people. We just love the British accents. We think they're great. We're big fans of the Savoy hotel. The food, it's not Paris, but we just love the theater. We love walking the city, the shopping, the culture, the museums, the art galleries. In the totality those are the things we look at. It's also a very walkable city. We like to walk. It's also easy to get cabs. The public transportation is pretty good there which is fun

HNW – USA(West)



Britain is a good place, famous place for tourists. London Eye, Big Ben and Westminster Abbey are some of the attractions for the travellers. The country has rich cultural and tradition. I perceive the country is known for its old castles, dating back to ancient sites and royal palaces

MA – UAE, Gulf



Britain - for me - it is a very historical country - it is embedded with many luxury traditions - e.g. Scottish whisky is so famous. Also, the Queen and royal family can be found in this country. These royal members are still very respectable among the people. London should be one of the top financial centers in the world so that I expect to see many rich people over there

MA - South Central (Guangzhou) China



I have a quite favorable perception of Britain which has certain well-known attractions e.g. Buckingham Palace, British Museum, St. Paul Cathedral and the two famous universities - Oxford and Cambridge. I look forward to my next visit and hope to see a lot more

HNW - East (Shanghai) China

Spontaneously weather, terrorism, visa regulations and safety concerns are list as the top barriers for visiting Britain, but majority of travellers do not have any barriers.



Spontaneous



Exchange rate and long flights are some of the main things that stand out for US travellers
"It can take quite a while to get to the UK so I tend to plan more for the longer haul holidays"

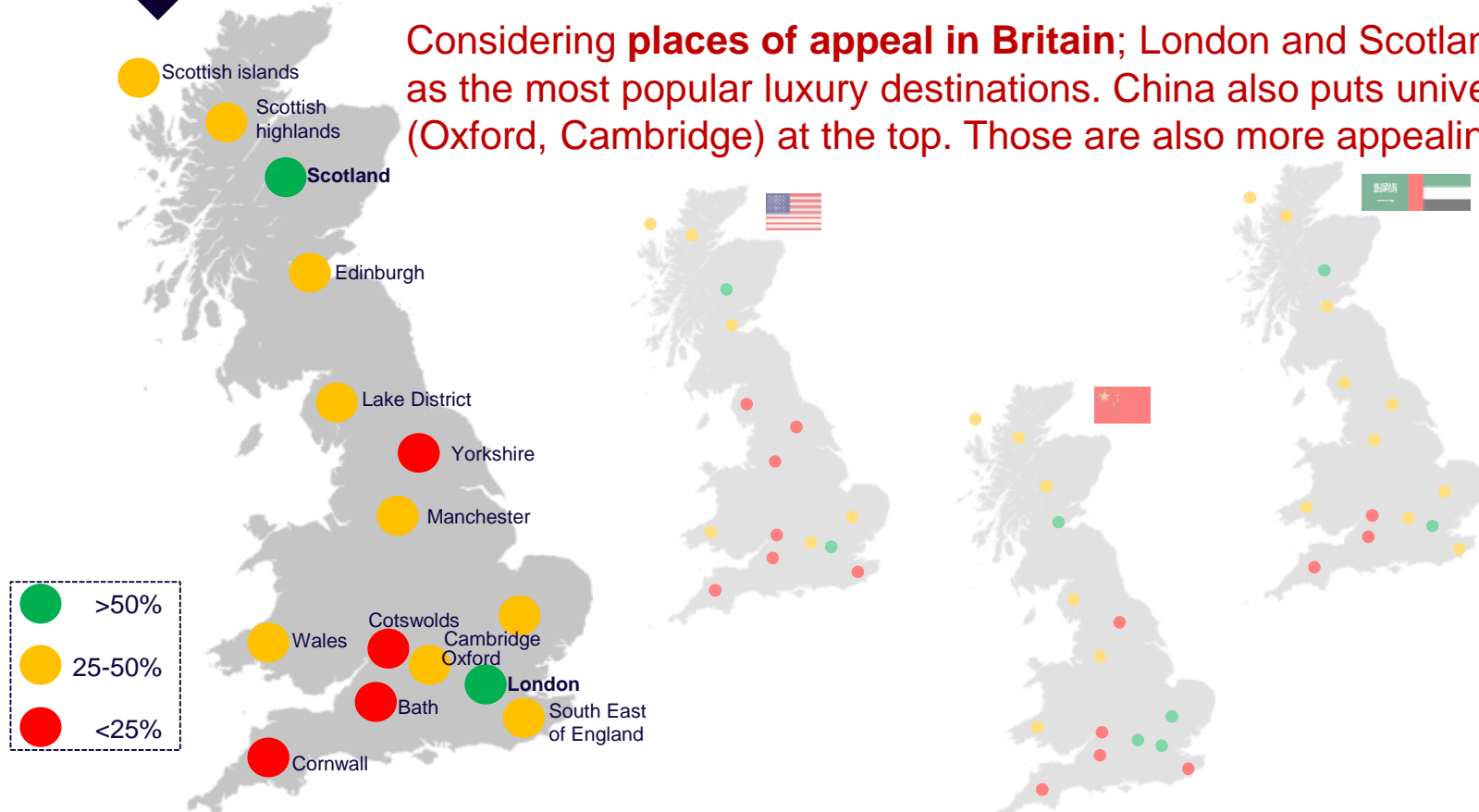


State language and visa as main barriers.
"A weakness of Britain - some service staff in London look quite arrogant and discriminating against the Chinese!"



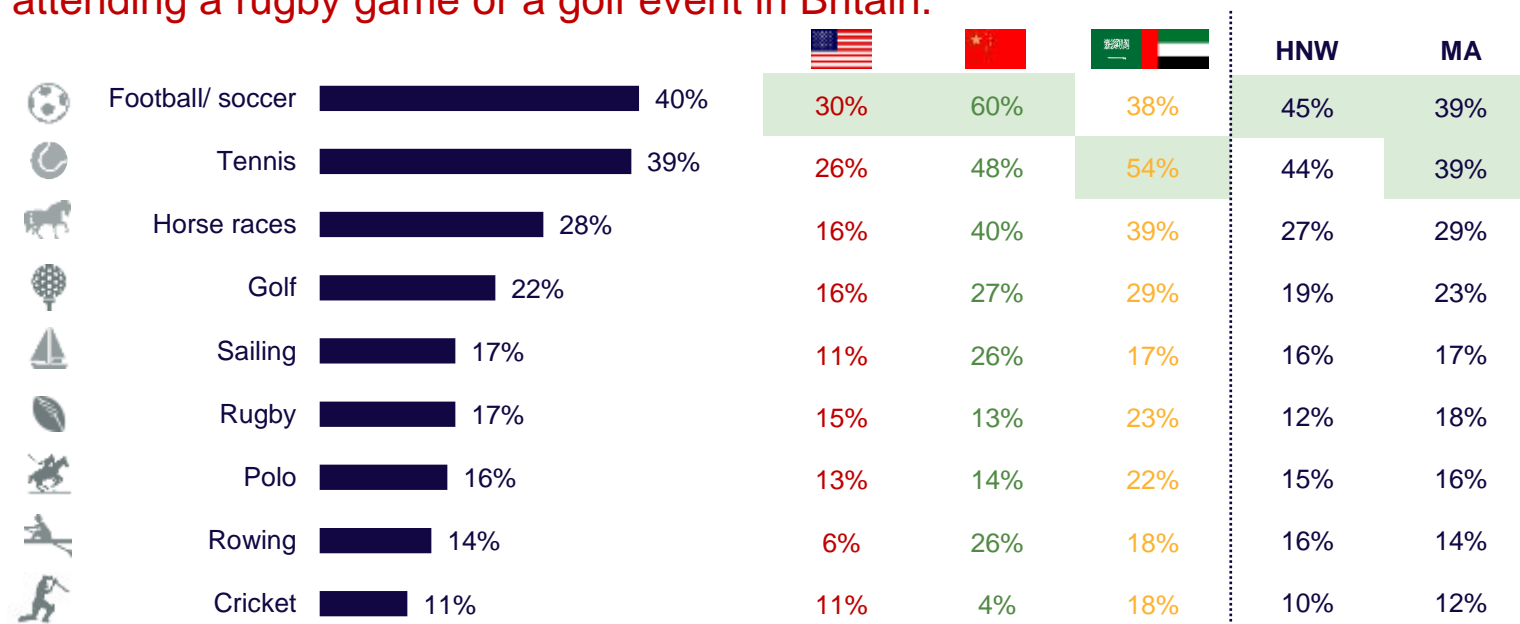
Political instability (including Brexit) and **safety** concerns are voiced out in the Gulf
"I worry about the unstable government situation"

Considering **places of appeal in Britain**; London and Scotland stand out as the most popular luxury destinations. China also puts university cities (Oxford, Cambridge) at the top. Those are also more appealing to HNWs.



B2. Here is a list of possible places to visit in Britain. What destinations appeal to you for a luxury stay? Total (n=953), USA (n=453), China (n=250), Gulf (n=250)

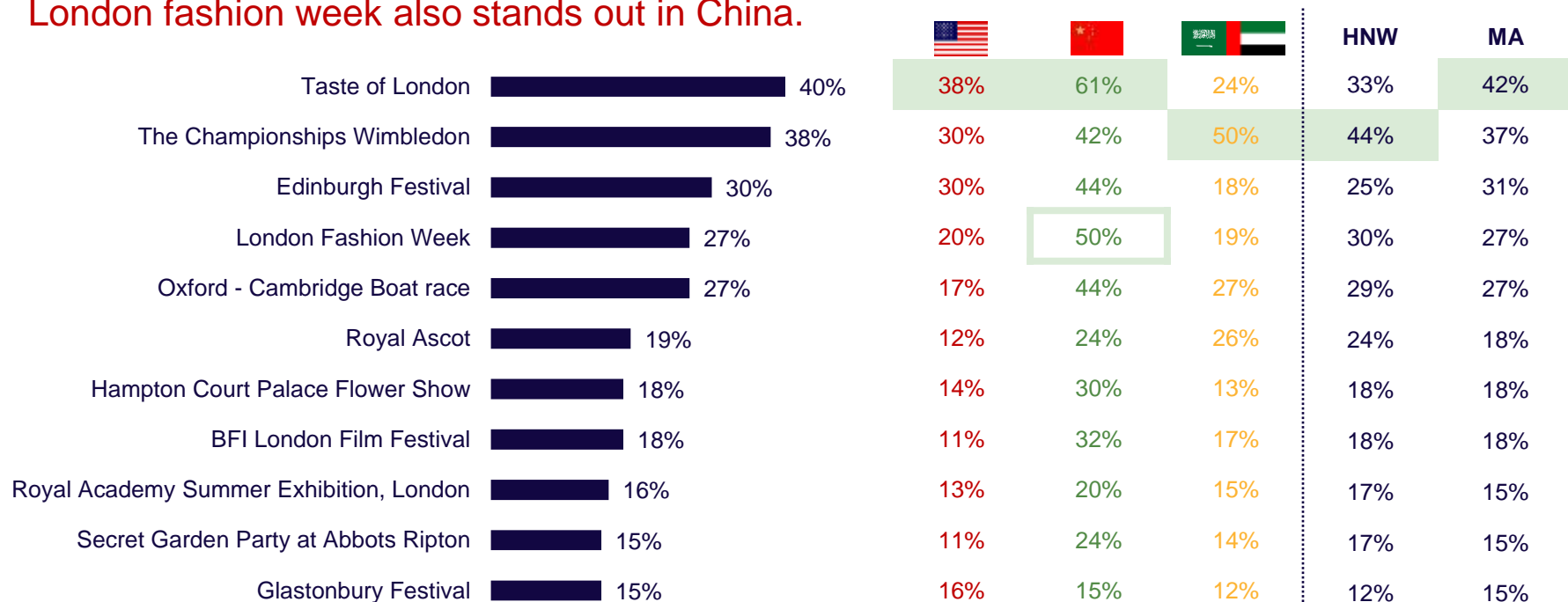
Thinking of **sporting events**, football/ soccer is the most popular sport among US and China travellers; Gulf travellers are more likely to be attracted by tennis. Some marginal differences show between affluence groups: attending a game of football/ soccer or tennis is more appealing to the HNW group, whereas the MA one would prefer attending a rugby game or a golf event in Britain.



B3. Which of these sports events would you be interested in attending in Britain? Total (n=953), USA (n=453), China (n=250), Gulf (n=250), HNW (n=153), MA (n=800)

Only items picked by about 10% of all respondents or more are shown here.

Looking at **cultural events**, unsurprisingly, Wimbledon is most popular among Gulf travellers. Chinese and US travellers put 'Taste of London' on the top of the list. HNW and MA groups will have the same difference in interests respectively. London fashion week also stands out in China.

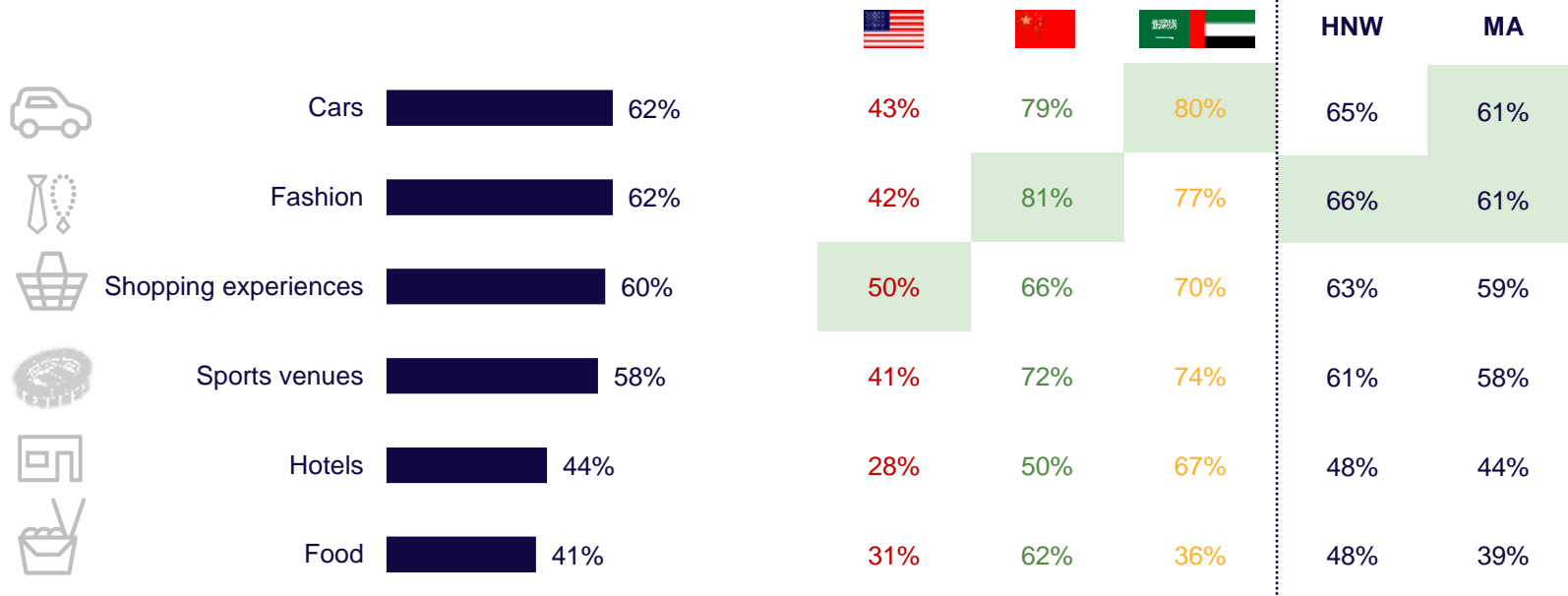


B4. What British cultural events would you be interested in attending, if any? Total (n=953), USA (n=453), China (n=250), Gulf (n=250), HNW (n=153), MA (n=800)

Only items picked by about 15% of all respondents or more are shown here.

Interests in British brands are very different from one market to the other: British shopping experiences are the most influential among Americans, fashion among Chinese respondents, and cars among Gulf travellers.

The latter two types of British brands are usually the most influential overall.



B5. Here are some luxury British brands. Would any of these have an influence on your visit to Britain? Total (n=953), USA (n=453), China (n=250), Gulf (n=250), HNW (n=153), MA (n=800). Only main brand categories are shown here.

Majority believe shopping is usually an important component of their luxury holiday, and those in Gulf and China believe Britain largely meets their shopping needs.

58%

Top 2 boxes

SAY SHOPPING IS USUALLY **AN**
IMPORTANT COMPONENT OF
LUXURY HOLIDAY



41%



80%



67%

HNW

66%

MA

56%

73%

China and Gulf only, top 2 boxes

THINK BRITAIN CAN **MEET THEIR**
SHOPPING NEEDS WELL



85%



62%

HNW

85%

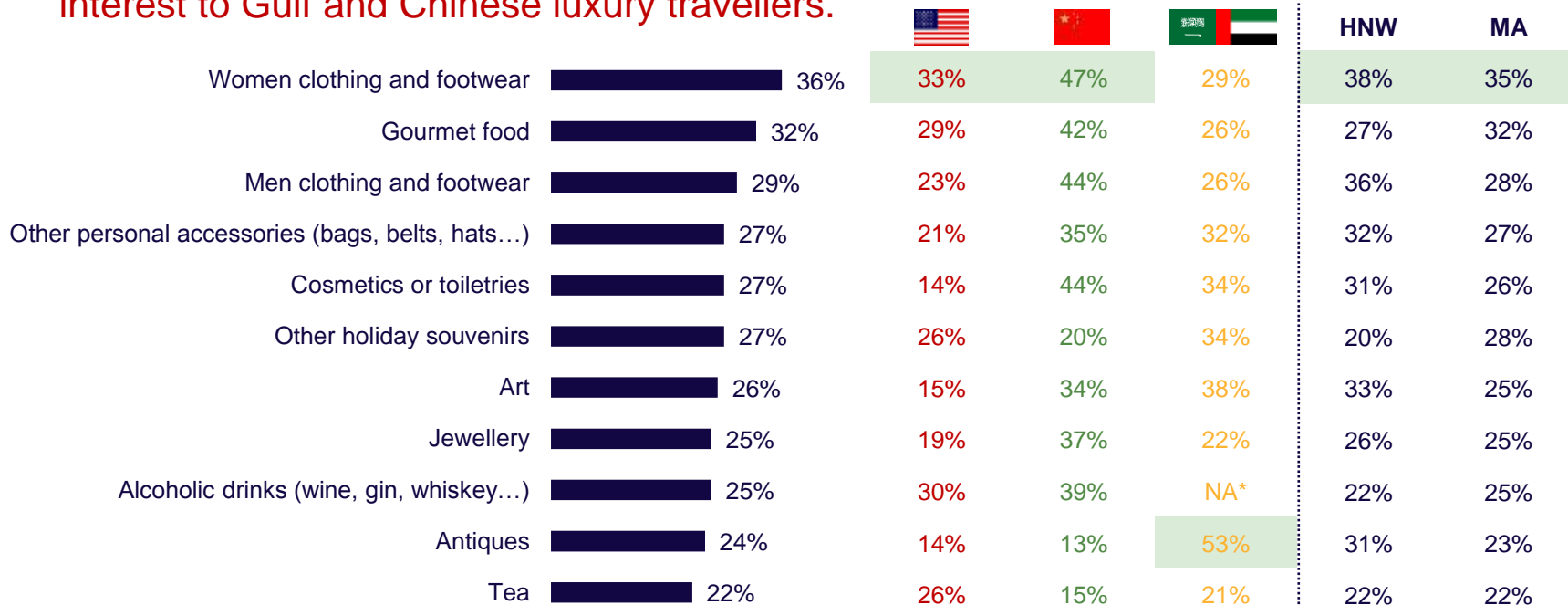
MA

71%

B6. To what extent would you say that going shopping is usually an important component of your luxury holiday experience? B6x. How well do you think Britain can meet your shopping needs (China and Gulf only)? Scale from 1 to 5, top 2 boxes = 4 and 5

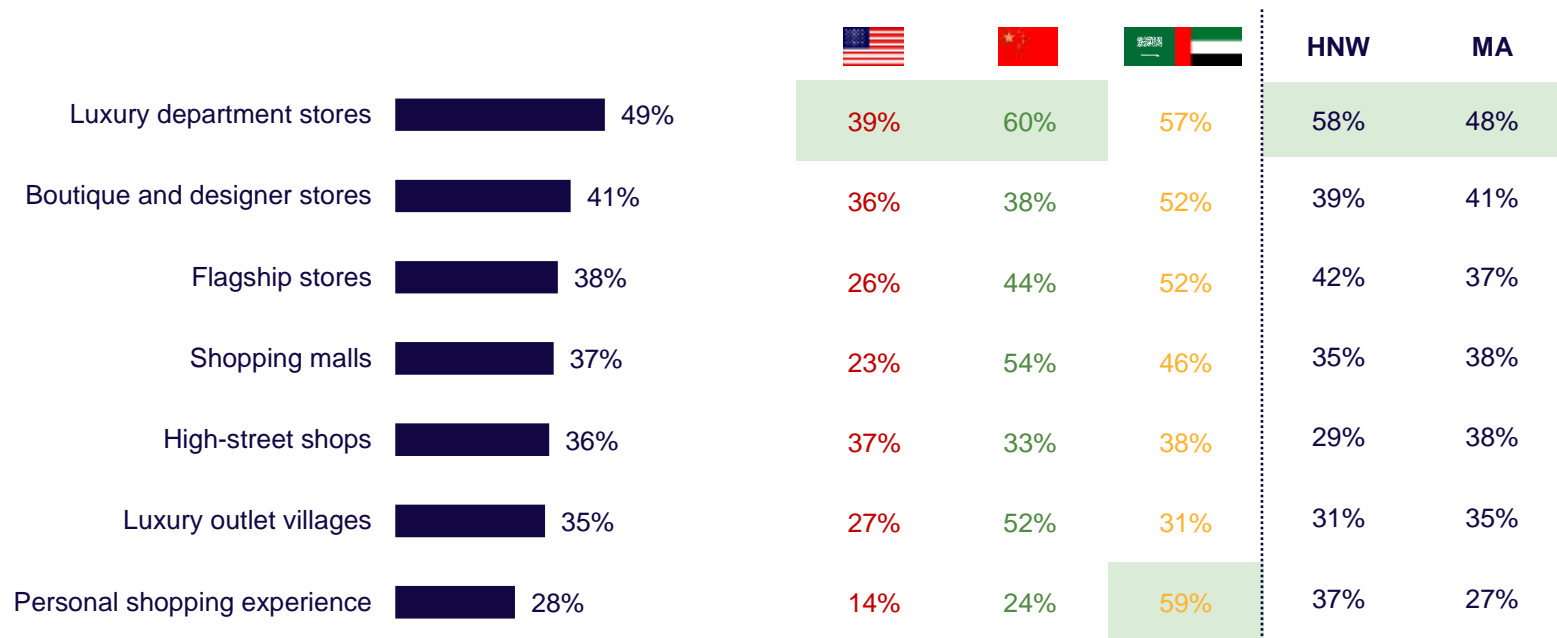
Total (n=953, and for B6x: n'=500), USA (n=453), China (n=250), Gulf (n=250), HNW (n=153, n'=100), MA (n=800, n'=400)

Their **shopping interests in Britain** include women clothing/footwear being the major driver for US and China. But in Gulf, antiques and art are more popular. Other items to buy in Britain such as toys or children clothing and footwear are also of interest to Gulf and Chinese luxury travellers.



B6a. What would you be interested in buying in Britain? Total (n=953), USA (n=453), China (n=250), Gulf (n=250), HNW (n=153), MA (n=800)
 Only items picked by over 20% of all respondents are shown here. *This item was not shown in the Gulf.




When on holiday and going shopping, apart from the luxury departmental stores that are popular across the board, personal shopping experiences stand out for Gulf travellers and HNW travellers in general, while the MA would prefer visiting high-street shops.



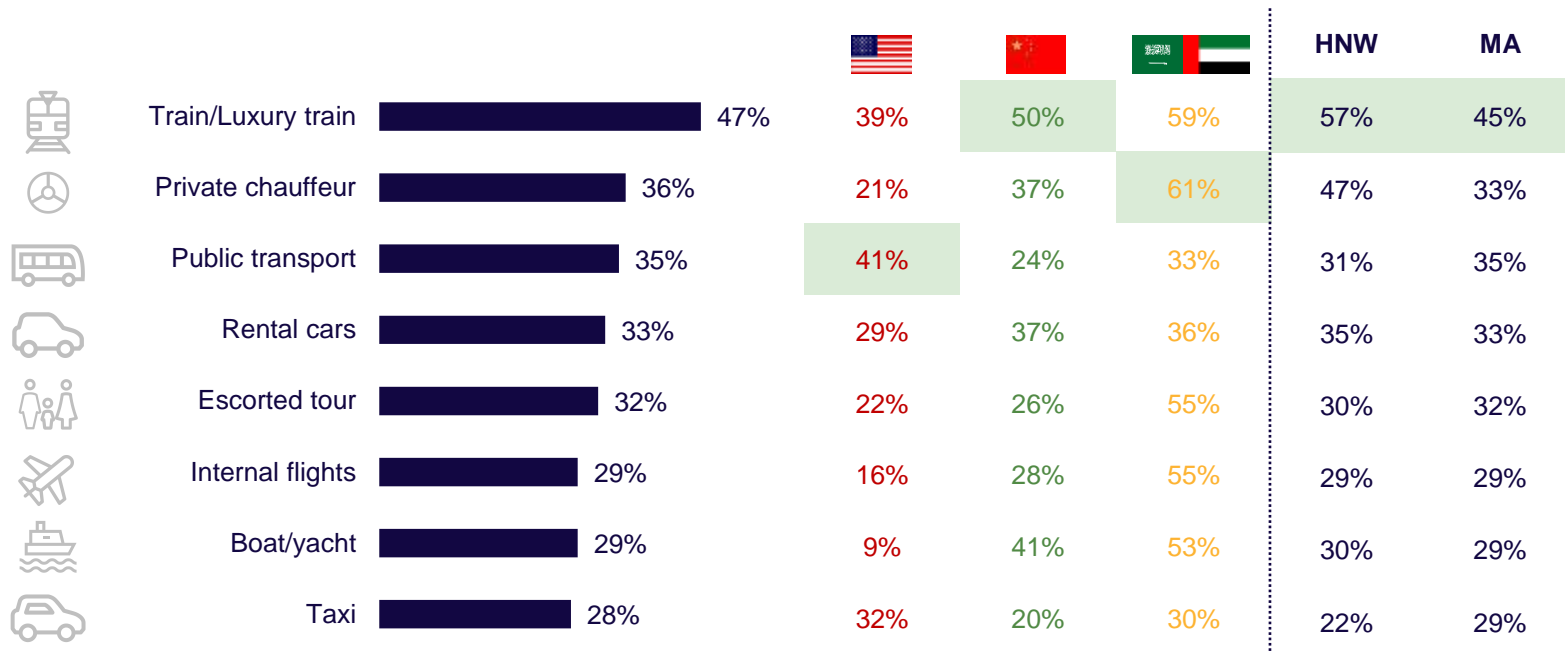
5-star hotels are the most **popular accommodation type used in Britain**.
 US respondents would prefer any hotel accommodations, while Chinese and Gulf respondents would prefer other types of accommodation.

84%

75%

	Total				HNW	MA
Luxury hotel, 5-star hotel and over	48%	38%	52%	65%	56%	47%
4-star hotel	37%	49%	21%	30%	29%	38%
Boutique hotel	30%	32%	26%	31%	27%	31%
Mid-range hotel	15%	21%	10%	11%	10%	16%
Castle	34%	27%	42%	38%	46%	32%
Stately home or historic house	32%	17%	52%	40%	38%	31%
High-end Guest House/ Bed and Breakfast	27%	27%	28%	24%	33%	25%
Serviced apartment/house/cottage/villa	25%	18%	32%	30%	22%	25%
On a boat	15%	8%	16%	28%	22%	14%
Glamping	14%	5%	16%	29%	11%	15%
Self-catered accommodation or house	12%	9%	4%	24%	11%	12%
Privately rented house	9%	NA**	14%	20%	10%	9%

Transport needs vary by market: trains or luxury trains are usually high up on the respondents' list of preferred transports to get around in Britain, however Gulf travellers would prefer a private chauffeur, and most of US visitors would not hesitate to use public transports.



Compared to other destinations, resonant with Britain's perceptions earlier, history and cultural heritage stand apart. London also makes a strong impression.

		Rich history	Heritage culture and architecture	Capital city	Traditional image	Countryside and rural areas	Luxury experiences	Live entertainment	Ease of getting around	Unique experiences	Parks and green space	Relaxing experiences	Smaller towns/villages	Family-friendly options	Shopping experiences	Buzzworthy destination	Sports events	Romance	Food and drink	Modern image	Seasonal activities and destination	Visa application process	Customised services	Other main cities	LGBT friendly options**
Total	Better	60%	59%	48%	45%	43%	42%	42%	41%	38%	38%	37%	35%	33%	32%	32%	32%	29%	29%	28%	28%	28%	27%	26%	12%
	Same	36%	38%	45%	48%	48%	52%	48%	50%	56%	54%	53%	53%	51%	55%	51%	51%	56%	55%	58%	52%	49%	61%	63%	28%
	Worse	1%	2%	2%	2%	3%	2%	3%	6%	4%	3%	7%	5%	5%	4%	8%	4%	7%	14%	8%	12%	8%	3%	5%	4%
	Don't consider	3%	2%	5%	5%	6%	3%	7%	3%	2%	5%	3%	7%	11%	9%	9%	12%	8%	2%	6%	7%	15%	10%	6%	56%
Ability to influence a visit to Britain*		47%	44%	25%	23%	29%	29%	24%	26%	34%	18%	28%	21%	23%	23%	15%	21%	17%	24%	13%	20%	12%	13%	9%	1%
HNW	Better	59%	61%	48%	37%	47%	43%	51%	40%	39%	31%	35%	34%	29%	33%	31%	35%	23%	27%	29%	26%	31%	27%	25%	9%
	Same	34%	35%	39%	56%	40%	52%	38%	44%	52%	53%	52%	51%	50%	50%	47%	48%	59%	56%	56%	52%	44%	59%	60%	13%
	Worse	2%	1%	3%	2%	4%	2%	3%	8%	7%	5%	8%	4%	6%	5%	9%	5%	7%	14%	8%	11%	5%	4%	6%	0%
	Don't consider	5%	3%	9%	6%	9%	3%	8%	8%	2%	12%	5%	11%	15%	11%	13%	13%	12%	2%	7%	11%	20%	9%	8%	77%
Ability to influence a visit to Britain*		50%	46%	27%	25%	31%	31%	30%	25%	31%	16%	31%	20%	25%	28%	17%	26%	16%	22%	14%	21%	10%	16%	8%	0%
MA	Better	60%	58%	48%	47%	43%	42%	41%	41%	38%	39%	38%	35%	33%	32%	32%	32%	31%	30%	27%	29%	28%	27%	26%	13%
	Same	37%	38%	47%	46%	50%	53%	50%	52%	57%	54%	53%	53%	52%	56%	52%	52%	56%	55%	58%	53%	50%	61%	63%	30%
	Worse	1%	2%	2%	3%	3%	2%	3%	6%	3%	3%	7%	5%	5%	3%	7%	4%	7%	14%	8%	12%	8%	3%	5%	5%
	Don't consider	2%	2%	4%	4%	5%	3%	7%	2%	2%	4%	2%	6%	10%	8%	8%	12%	7%	2%	6%	7%	14%	10%	6%	53%
Ability to influence a visit to Britain*		47%	43%	25%	55%	28%	29%	23%	26%	35%	19%	28%	21%	22%	22%	14%	20%	17%	25%	13%	20%	12%	12%	10%	2%

B10. Compared to other destinations you would consider for a luxury holiday, how would Britain compare on...? B11. Among the aspects you said Britain compared well or similarly to other destinations, which would actually make you book a holiday to Britain?

Total (n=953, and for B11, when different: n'=948), HNW (n=153), MA (n=800, n'=795)

* Based on those who selected 'Better' or 'Same' at B10 only. ** Only asked to US respondents

Compared to other destinations, resonant with Britain's perceptions earlier, history and cultural heritage stand apart. London also makes a strong impression.

		Rich history	Heritage culture and architecture	Capital city	Traditional image	Countryside and rural areas	Luxury experiences	Live entertainment	Ease of getting around	Unique experiences	Parks and green space	Relaxing experiences	Smaller towns/villages	Family-friendly options	Shopping experiences	Buzz/trendy destination	Sports events	Romance	Food and drink	Modern image	Seasonal activities and destination	Visa application process	Customised services	Other main cities	LGBT-friendly options**
USA	Better	66%	63%	45%	52%	46%	27%	41%	40%	32%	32%	19%	40%	20%	27%	24%	22%	20%	20%	21%	18%	36%	19%	21%	12%
	Same	30%	32%	47%	42%	46%	64%	47%	48%	60%	56%	63%	49%	51%	56%	50%	49%	59%	50%	58%	47%	35%	63%	65%	28%
	Worse	1%	3%	3%	1%	3%	4%	4%	8%	5%	6%	13%	5%	8%	5%	12%	6%	11%	26%	13%	21%	3%	4%	6%	4%
	Don't consider	3%	2%	5%	5%	5%	6%	8%	4%	3%	7%	6%	6%	21%	12%	13%	23%	10%	3%	8%	14%	26%	15%	8%	56%
Ability to influence a visit to Britain*		49%	46%	26%	23%	31%	15%	20%	29%	31%	12%	16%	26%	9%	15%	9%	11%	8%	18%	8%	7%	8%	7%	9%	3%
China	Better	70%	73%	62%	57%	52%	60%	50%	49%	58%	58%	62%	39%	50%	45%	52%	52%	51%	46%	40%	41%	32%	43%	25%	
	Same	27%	26%	35%	39%	43%	39%	47%	47%	40%	40%	36%	52%	46%	51%	44%	42%	42%	48%	57%	54%	60%	51%	65%	
	Worse	3%	2%	2%	3%	4%	1%	2%	4%	2%	2%	2%	6%	4%	3%	4%	6%	5%	5%	3%	4%	6%	4%	7%	
	Don't consider	0%	0%	1%	1%	1%	<1%	1%	0%	<1%	1%	1%	2%	<1%	<1%	<1%	1%	1%	1%	0%	1%	2%	1%	3%	
Ability to influence a visit to Britain*		56%	44%	29%	22%	31%	41%	26%	26%	37%	27%	37%	15%	28%	40%	18%	30%	28%	33%	14%	24%	16%	11%	15%	
Gulf	Better	37%	37%	38%	22%	30%	54%	37%	33%	29%	28%	46%	22%	38%	30%	27%	31%	24%	30%	27%	35%	12%	25%	35%	
	Same	58%	60%	53%	66%	56%	45%	50%	58%	66%	64%	53%	60%	58%	58%	62%	64%	64%	70%	58%	60%	63%	66%	56%	
	Worse	<1%	0%	2%	4%	3%	<1%	2%	4%	3%	<1%	1%	4%	2%	1%	2%	1%	1%	0%	5%	3%	18%	1%	2%	
	Don't consider	5%	3%	7%	8%	12%	1%	11%	5%	2%	7%	0%	14%	2%	11%	9%	4%	10%	<1%	10%	2%	7%	8%	7%	
Ability to influence a visit to Britain*		36%	39%	20%	23%	23%	43%	30%	20%	35%	22%	42%	18%	42%	21%	21%	30%	23%	27%	20%	39%	14%	27%	14%	

B10. Compared to other destinations you would consider for a luxury holiday, how would Britain compare on...? B11. Among the aspects you said Britain compared well or similarly to other destinations, which would actually make you book a holiday to Britain?

USA (n=453, and for B11: n'=448), China (n=250), Gulf (n=250)

* Based on those who selected 'Better' or 'Same' at B10 only. ** Only asked to US respondents

Customisation is critical. Cultural experiences, VVIP treatment, exclusive visits to football clubs and a touch of royalty are the need of the hour.

Spontaneous



Elegant food service, room with view, being met at airport and driven to destination, private tour of houses and gardens; spa type bathroom.

HNW - USA



A private or semi private tour through the countryside offering information on the history and development of the area.

MA - USA



Everything inclusive. All we have to do is show up and prepare to have a good time.

MA - USA



Private tour guide accompanied by private drivers driving high-end cars.

MA - China



Visit the wealthy football club and star.

HNW - China



Private luxury accommodation, Michelin recommended restaurants, luxury shops.

MA - China



Customised travel options & accommodation. Royal treatment at the places where we chose to stay.

HNW - East (Shanghai), Gulf



Wherever I go, whatever places I visit, I prefer to have VVIP treatment. Also, if am going to watch a game. I want my seat to be in the most premium stand.

HNW - Gulf



It should cover site seeing, travel, authentic special food and complete entertainment. It should give full value.

HNW - Gulf

KANTAR MILLWARD BROWN



Visiting Britain



The feeling of 'royal' is believed to be very unique and something they can only find in Britain if visiting English-speaking countries.



Appeal around **relaxation**, **luxurious** offers such as horse riding, diving, hot air ballooning and outdoor activities and warm weather all appealing. Outdoor activities and enjoying landscape of Britain appeals.



Offers a lot of cultural activities and opportunities to learn about **history** and **Royalty and luxury**. Castles and the Queen are unique and viewed as a great endorsement to travel to Britain. Britain thought to have a lot of wealthy people residing here so shops and restaurants would be appealing.



Combination of **Royal, noble and historical** combined with **relaxation** makes the perfect stay in Britain. Exclusive tours and experiences which reflect Britain's **distinctiveness** appeal greatly.

Relaxation

Luxurious & adventurous

Cultural

Royal & historical

Exclusive

Royal & relaxing

Britain as their future holiday destination – in summary...



- Total (n=953) for B13
- Total (n=789) for B13a, B14, B15 and B16 (those who will visit Britain at some point)

Britain as their future holiday destination split by countries...



- USA (n=453), China (n=250), Gulf (n=250) for B13
- USA (n=344), China (n=246), Gulf (n=199) for B13a, B14, B15 and B16 (those who will visit Britain at some point)

Time	Month	On its own	London and others	Holiday length
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91%

HAVE BRITAIN IN THEIR BUCKET LIST*



BUT OVERALL

65%

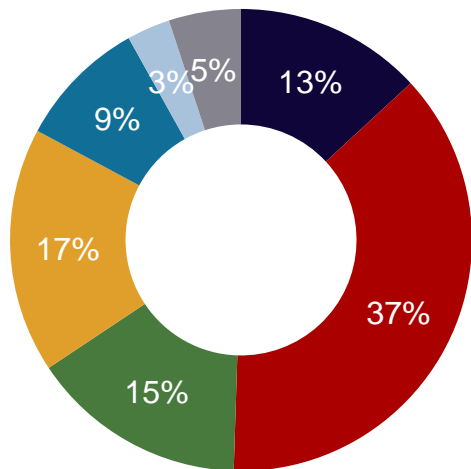
PLAN TO VISIT BRITAIN IN THE NEXT 3-4 YEARS






B13. When would you be likely to visit Britain, if at all? Total (n=953), USA (n=453), China (n=250), Gulf (n=250), HNW (n=153), MA (n=800)
 Only items picked by over 40% of all respondents are shown here. *All respondents but those answering 'do not plan to visit at all' and 'don't know'.

Time	Month	On its own	London and others	Holiday length
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Half of the travellers we spoke to **plan to visit Britain** with in the next year or two, especially the Chinese.

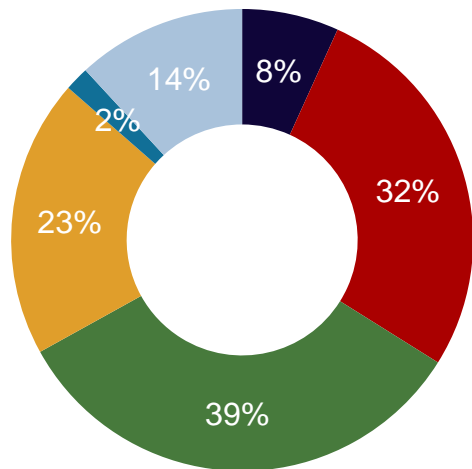





- Within the next few months
- Within the next year or two
- Within the next three or four years
- I definitely plan to visit Britain but I don't know when
- Do not plan on visiting Britain in the near future
- Do not plan on visiting Britain at all
- Don't know

				HNW	MA
	11%	26%	2%	21%	11%
	31%	58%	28%	35%	38%
	15%	6%	26%	9%	17%
	19%	8%	24%	18%	17%
	15%	1%	6%	12%	8%
	5%	0%	3%	1%	4%
	4%	1%	12%	5%	6%

Time	Month	On its own	London and others	Holiday length
------	-------	------------	-------------------	----------------

Favourite **time to visit** is between July to September, the peak summer holiday season. HNW travellers would consider the shoulder season more than MA, especially winter.



				HNW	MA
■ January – March	5%	5%	15%	10%	7%
■ April – June	36%	35%	22%	35%	32%
■ July – September	42%	40%	32%	30%	40%
■ October – December	17%	34%	21%	35%	21%
■ For a specific period or occasion	2%	0%	4%	2%	2%
■ Don't know	13%	4%	26%	10%	14%

Time

Month

On its own

London and others

Holiday length

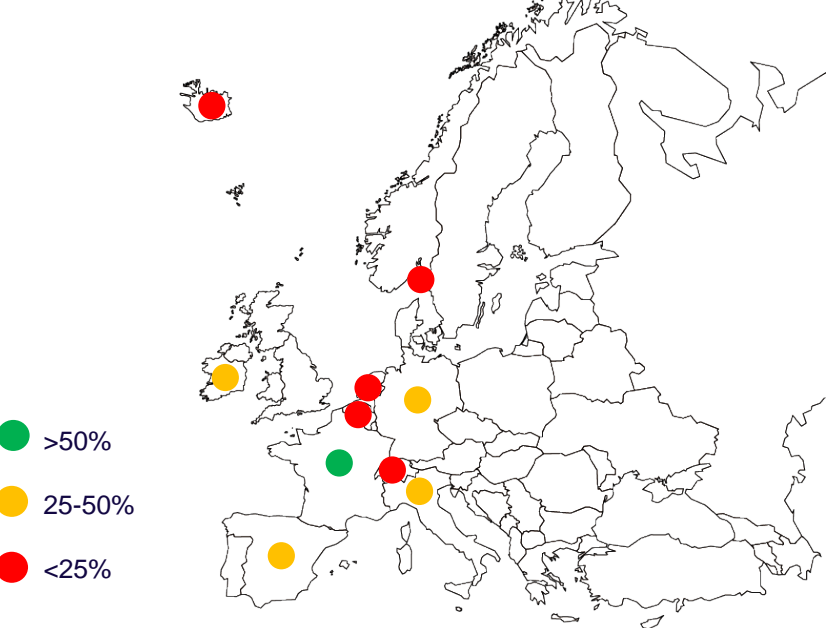
60%




WOULD VISIT BRITAIN ON
ITS OWN...



Time	Month	On its own	London and others	Holiday length
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If they **do combine it with other countries**, France would be their most popular choice. Only a few would consider Britain as a stopover onto another continent.






	Total				HNW**	MA
France	51%	54%	68%	36%	38%	54%
Italy	38%	36%	51%	33%	30%	40%
Ireland*	34%	41%	35%	22%	30%	34%
Germany	33%	22%	57%	33%	19%	35%
Spain	26%	25%	22%	29%	34%	24%

B14a. What countries would you also visit in the same trip as Britain? Those who would combine with another country Total (n=317), USA (n=153), China (n=68), Gulf (n=96), HNW (n=47), MA (n=270). Only items picked by over 25% of all respondents are shown here. *Ireland refers to Northern Ireland and the Republic of Ireland. **Reduced sample size, information is indicative only.

Time	Month	On its own	London and others	Holiday length
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London would be their **preferred location to stay**, with Gulf also choosing other cities more prominently.

Place of stay...	Total				HNW	MA
London	88%	85%	91%	88%	87%	88%
Other cities	48%	44%	35%	70%	47%	48%
Rural area/ countryside	35%	39%	33%	31%	37%	35%

Take day trips from ...

London	75%	73%	84%	68%	78%	75%
Other cities	40%	40%	16%	70%	44%	39%
Rural area/ countryside	28%	36%	15%	29%	29%	27%

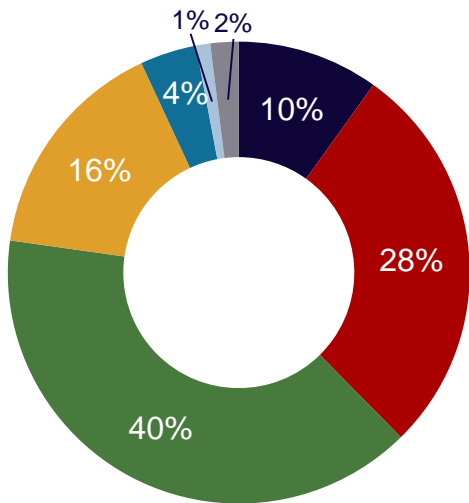





B15. Which of the following places would you stay at during a holiday visit to Britain? B15a. And would you take any day trips from? Those who will visit Britain at some point:

- Total (n=789), USA (n=344), China (n=246), Gulf (n=199), HNW (n=127), MA (n=662) for B15
- Total (n=782), USA (n=337), China (n=246), Gulf (n=199), HNW (n=127), MA (n=655) for B15a (not including those who will not take any day trips)

Time	Month	On its own	London and others	Holiday length
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60% would stay for longer than a week; this being much higher for the Gulf and HNW travellers in general.



				HNW	MA
A short break (up to few days)	13%	7%	8%	6%	10%
1 week	31%	34%	14%	18%	29%
1 – 2 weeks	40%	46%	30%	41%	39%
2 – 3 weeks	11%	11%	29%	25%	14%
Up to a month	3%	2%	11%	7%	4%
A month or more	<1%	<1%	2%	2%	<1%
Don't know	2%	0%	6%	1%	3%






KANTAR MILLWARD BROWN

Appendix

Sample profile - quantitative



Market	HNWI	Mass Affluent	Total
	53	400	453
	50	200	250
	50	200	250

Travel abroad	Last trip	Next trip
Within the last 3 months	32%	27%
4 - 6 months ago	30%	38%
7 - 12 months ago	25%	26%
13 - 18 months ago	8%	8%
18 months – 3 years ago	4%	1%

Travel destination	Last 3 yrs	Next 12-18m
Oceania	35%	32%
North and central America	70%	63%
Asia	58%	44%
Middle east	19%	12%
Europe	71%	69%
South America	24%	21%

Sample profile - quantitative

Travel to Britain	Leisure	Business
Once	35%	16%
Two to four times	29%	19%
Five times or more	7%	10%
Never	30%	54%

Classify trips as luxury	Leisure	Business
All	25%	8%
Most	40%	20%
Some	24%	22%
A few	10%	13%
None	1%	37%

Demographics



63%

37%

18 to 24	4%
25 to 34	21%
35 to 44	29%
45 to 54	23%
55 to 64	14%
65+	8%

Avg. number of adults in HH	2.8
Avg. number of children in HH (under 18)	1
Avg. number of trips abroad in L12M	2.7
Avg. number of leisure trips abroad in L12M	1.8
Avg. number of business trips abroad in L12M	1.1

Sample profile - qualitative



40min Tele-
depths conducted
throughout April
2017



Male	21
Female	9



18 to 24	1
25 to 34	4
35 to 44	10
45 to 54	10
55 to 64	4
65	1



China	10
Gulf (Saudi Arabia and UAE)	10
USA	10



We are using the following
definitions in terms of liquid
assets:

50% HNW = \$1 Million plus

50% Mass Affluent =
US\$150,000 - \$1 Million

Additional resources

Visit Britain have dedicated research and insights available which include:

- Luxury segment to Britain
<https://www.visitbritain.org/luxury>
- Planning, decision-making and booking cycle of international leisure visitors to Britain
<https://www.visitbritain.org/understanding-international-visitors>
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
[visitbritain.org/visitor-characteristics-and-behaviour](https://www.visitbritain.org/visitor-characteristics-and-behaviour)
- Food & drink research
[visitbritain.org/inbound-food-drink-research](https://www.visitbritain.org/inbound-food-drink-research)

We are here to support you and look forward to working with you.

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