



Destination Plymouth

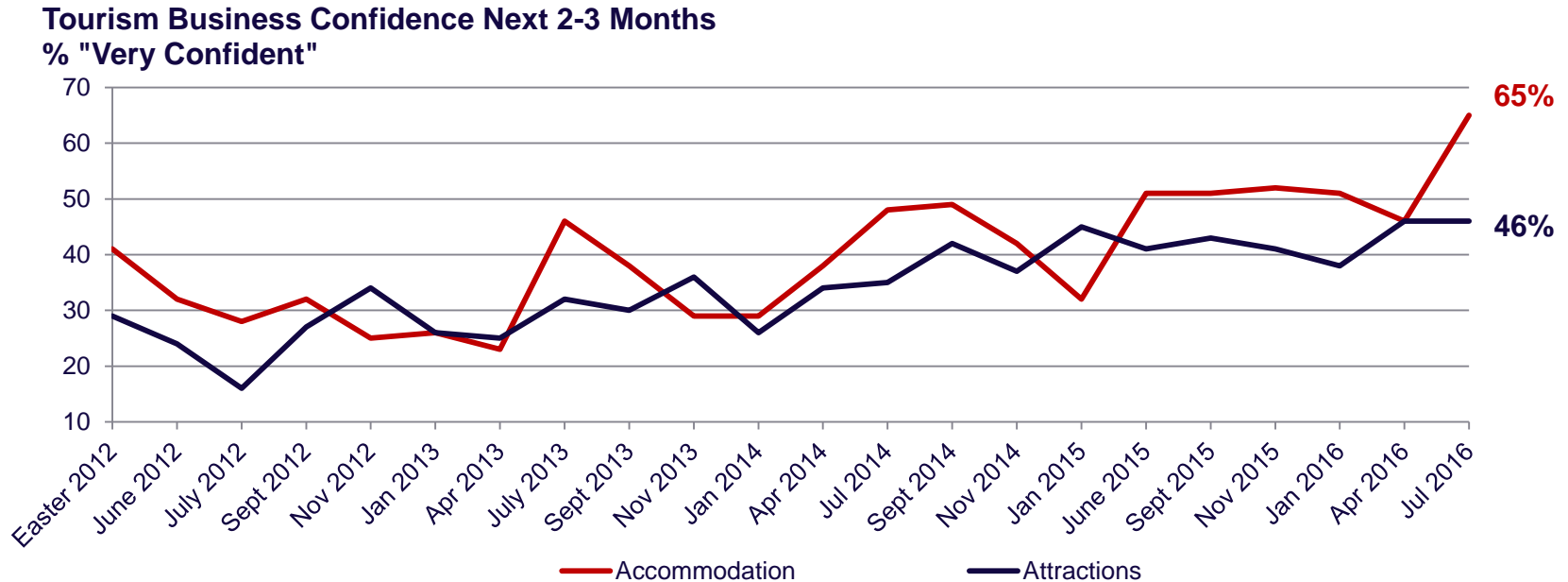
Andrew Stokes, VisitEngland

November 2016



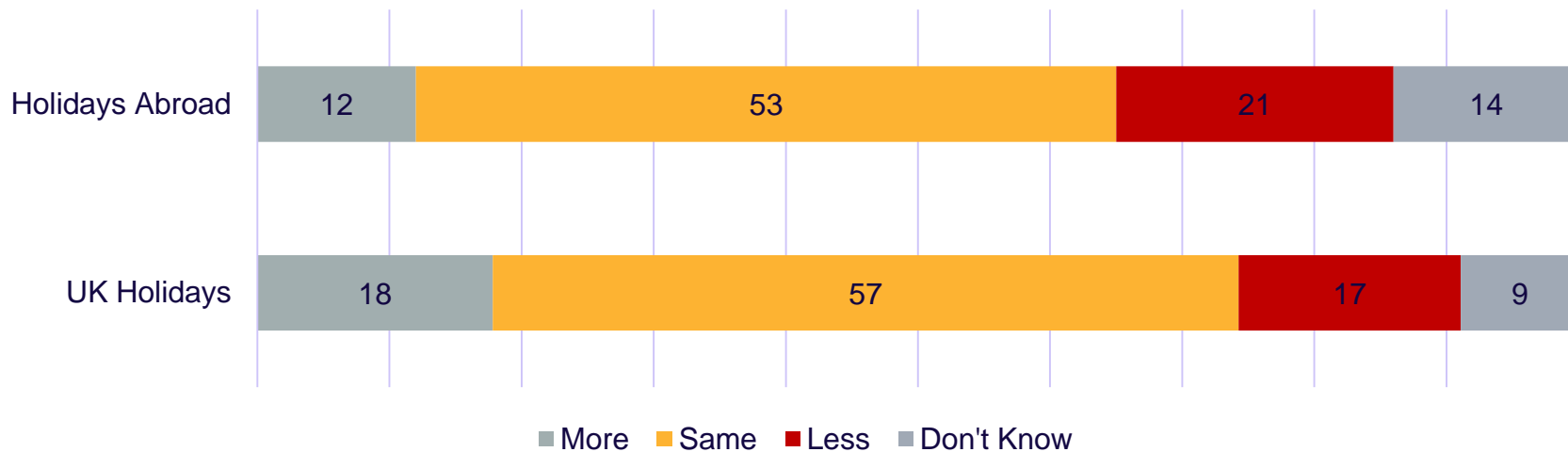
Latest update

Tourism business confidence is at a historically high level



Business optimism mirrored in consumer expectations for 2016 of (slightly) more UK but fewer overseas holidays

Expectations of Holidays in 2016 compared to 2015



IPS monthly latest (Jan-Aug 2016)

	Q1 (Jan-Mar)	Q2 (Apr-Jun)	July	August	Year to date (Jan – Aug)
	<i>% change vs. 2015</i>	<i>% change vs. 2015</i>	<i>% change vs. July 2015</i>	<i>% change vs. August 2015</i>	<i>% change vs. Jan – Aug 2015</i>
ALL VISITS (000)	8%	0%	2%	2%	3%
Spend (£ million)	-2%	-1%	4%	4%	0%

- Visits: increase in Q1, flat in Q2; growth in July and August on par with YtD
- Spending: a shift in the post-referendum months; spend per visit now increasing

Journey purpose and global region

Growth year to date from Europe and North America

Growth in visits	AUGUST 2016	LAST 3 MONTHS (JUN - AUG)	YEAR TO DATE (JAN - AUG 2016)
	% change vs. Aug 2015	% change vs. Jun - Aug '15	% change vs. Jan - Aug '15
Holiday	-2%	-4%	-4%
Visiting Friends and Relatives	5%	7%	9%
Business	0%	0%	3%
Miscellaneous	13%	17%	13%
EU15	1%	-1%	2%
Other EU	-3%	10%	11%
Rest of Europe	-6%	-14%	0%
North America	13%	7%	3%
Rest of World	0%	3%	-1%

- Forward Keys flight booking data: next 3 months looking positive with the Nov 2016 – Jan 2017 period up 4%, longer term up 4% for the next 6 months (Nov 2016 – Apr 2017)
- Particularly long-haul bookings from China and the US look very positive for the Christmas period coming up.

Inbound tourism by nations/regions

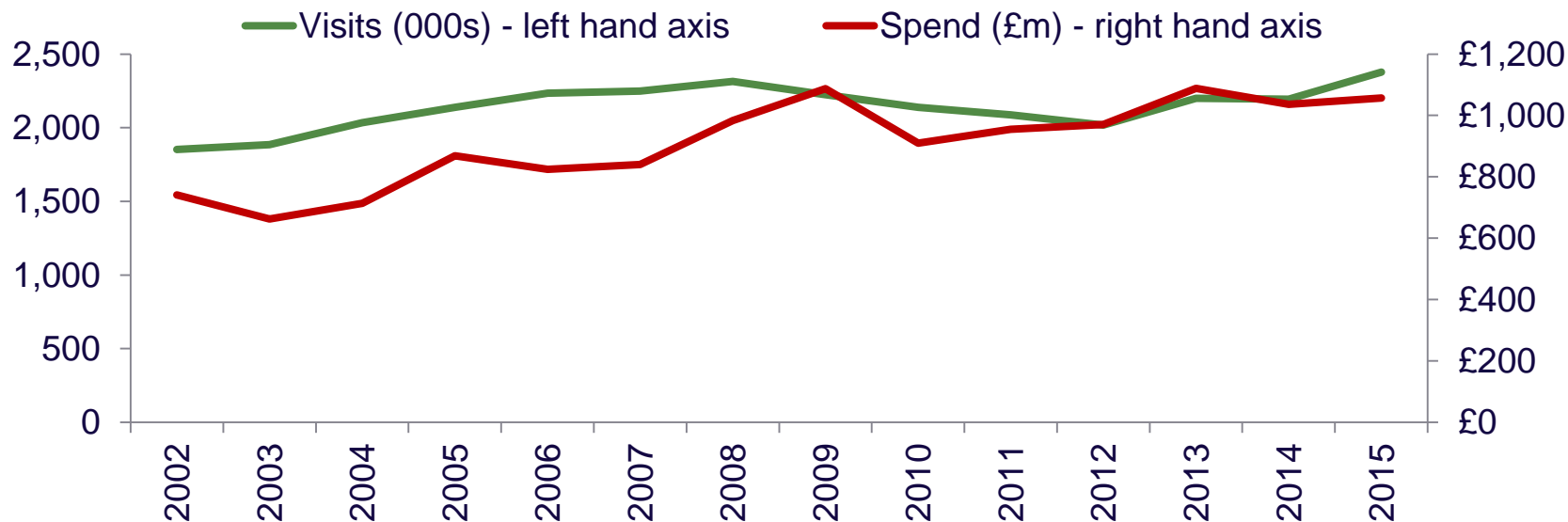
First half of 2016: visit numbers and growth rates

	Visits (000s)		
	YTD 2015	YTD 2016	Growth
Total UK	16,932	17,443	3%
Scotland	1,101	1,130	3%
Wales	392	450	15%
London	8,709	8,804	1%
Rest Of England	6,961	7,273	4%
North East	244	226	-8%
North West	1,273	1,289	1%
Yorkshire	578	620	7%
West Midlands	972	982	1%
East Midlands	519	612	18%
East Of England	996	1,089	9%
South West	961	1,101	15%
South East	2,345	2,329	-1%

- Most regions and nations seeing growth in visits
- Regional England outperforming London
- North East down from strong growth in 2015
- South West up 15%

South West long term trend

Visits up 8% in 2015 to 2.4million, beating previous record set in 2008





Key inbound markets

Top inbound markets

China and Saudi Arabia break into top ten spending markets for the first time

2015 rank (2014)	Country	2015 visits (000s)
1	France	4,171
2 (3)	USA	3,266
3 (2)	Germany	3,249
4	Ireland	2,632
5	Spain	2,197
6	Netherlands	1,897
7	Italy	1,794
8	Poland	1,707
9	Belgium	1,175
10	Australia	1,043

2015 rank (2014)	Country	2015 spend (£m)
1	USA	£3,010
2 (3)	France	£1,493
3 (2)	Germany	£1,378
4	Australia	£1,113
5	Spain	£999
6 (7)	Ireland	£934
7 (6)	Italy	£890
8	Netherlands	£676
9 (11)	China	£586
10 (17)	Saudi Arabia	£556

Spend per visit:

1. Saudi £3,769
2. Kuwait £2,898
3. China £2,174

Inbound markets, recent growth rates

Latest rolling year (Q3 2015 – Q2 2016) volumes, values and growth rates

Country of residence	Visits (000s)		Spending (£m)	
	Q3 2015 – Q2 2016	Growth	Q3 2015 – Q2 2016	Growth
Australia	1,061	4%	£1,164	5%
Belgium	1,126	-3%	£347	-4%
Brazil	270	-11%	£234	1%
Canada	709	3%	£546	9%
China	255	24%	£554	13%
France	4,045	-1%	£1,411	-2%
Germany	3,232	-1%	£1,415	-5%
India	410	-2%	£414	-15%
Ireland	2,662	3%	£1,004	15%
Italy	1,917	6%	£951	4%
Japan	213	1%	£212	7%
Netherlands	2,016	3%	£716	5%
Norway	762	-10%	£429	-17%
Poland	1,802	9%	£437	10%
Russia	153	-32%	£107	-56%
Spain	2,298	11%	£1,044	-5%
Sweden	815	-4%	£402	-28%
Switzerland	941	17%	£549	20%
UAE	362	33%	£481	14%
USA	3,274	8%	£3,074	3%

Top markets for South West

Germany top for volume and value

Rank (South West)	Rank (UK)	Country	Visits, 2013-15 (000s)
1	3	Germany	908
2	1	France	830
3	2	USA	587
4	6	Netherlands	433
5	4	Ireland	417
6	5	Spain	417
7	10	Australia	416
8	8	Poland	286
9	7	Italy	248
10	11	Switzerland	189

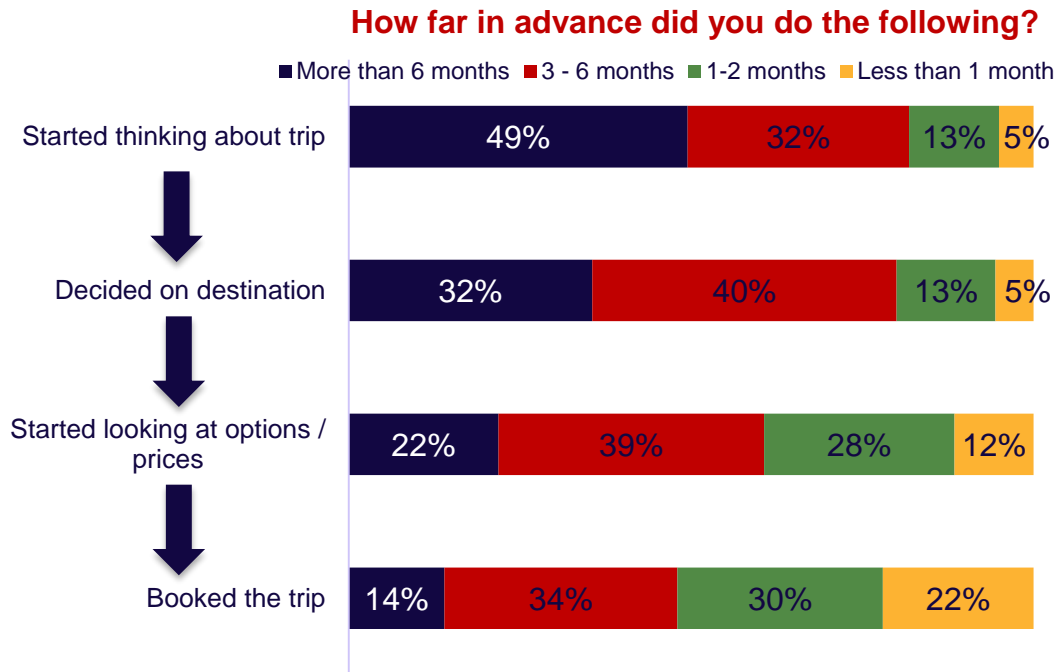
Rank (South West)	Rank (UK)	Country	Spend, 2013-15 (£m)
1	3	Germany	£434
2	2	France	£278
3	1	USA	£269
4	4	Australia	£233
5	5	Spain	£182
6	8	Netherlands	£148
7	6	Ireland	£133
8	7	Italy	£110
9	11	Switzerland	£90
10	13	Canada	£89



Planning and booking insights

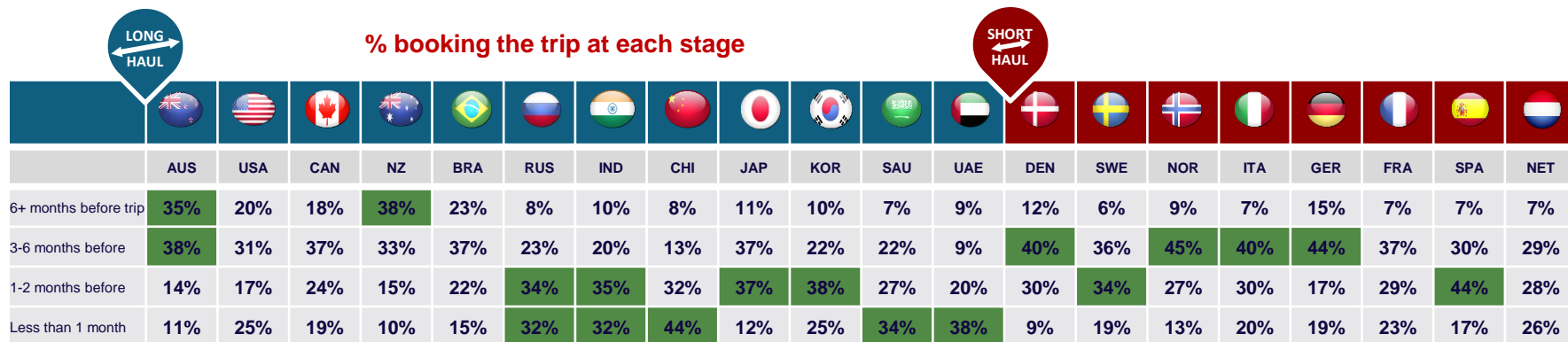
How long is the planning process?

- Almost half (49%) start **thinking about their trip** more than 6 months in advance of taking it.
- The **decision on destination** is likely to be made between 3 and 6 months for 40% and more than 6 months in advance for 32%.
- **Booking lead time** varies, 34% booked their trip 3-6 months in advance, 30% booked 1-2 months in advance, and 22% booked less than a month in advance.



How far in advance to people book their trip?

- Long haul visitors from **Gulf, Russia, India** and **China** are most likely to book their trip just a few weeks in advance, yet over a third of visitors from **Australia** and **New Zealand** do this 6+ months in advance.
- Among short haul, **Germany** tends to book their trip much earlier, with over half (59%) preferring to book at least 3 months before travelling. Markets such as **France, Spain** and **Netherlands** are more likely to book travel less than a month before.



QR5: Thinking about your holiday to Britain, how far in advance did you start thinking about the trip?

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)

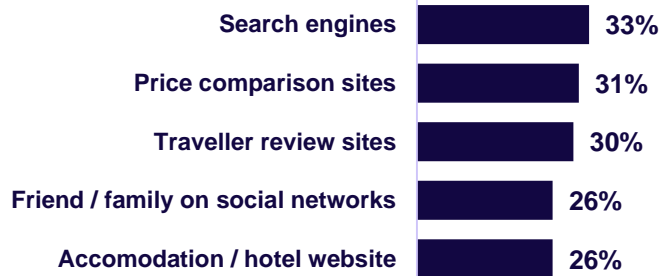
Key online and offline influences

- **Word of mouth** is the biggest influence (40%).
- **Online influences are strong**, with search engines used by a third (33%) and price comparison sites and traveller review sites used by 31% and 30%.
- **Social networks** are an important influence for one in four (26%).
- **Traditional methods** of influence such as guidebooks and brochures are still used; 25% would say a travel guidebook is a key influence, and 18% have used travel brochures, and 17% official brochures for the country or city they are visiting.
- More insights e.g. market level differences in report coming soon on our website!

Top 5 offline influences

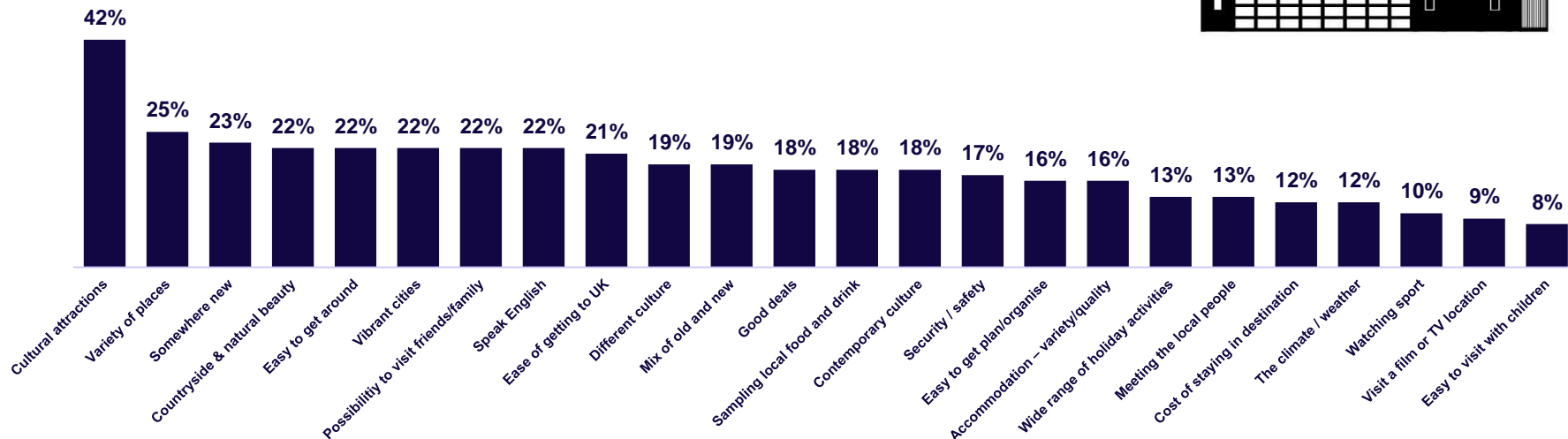


Top 5 online influences



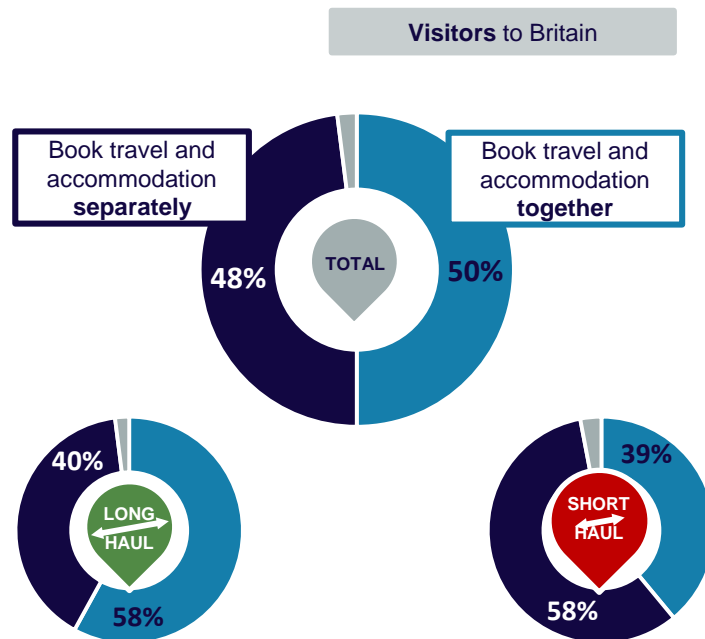
Reasons to visit Britain

- Visitors to Britain were likely to have been convinced by the cultural attractions, followed by the variety of locations on offer and having wanted to go somewhere new.
- Climate a positive draw or Saudi Arabia, India, UAE!



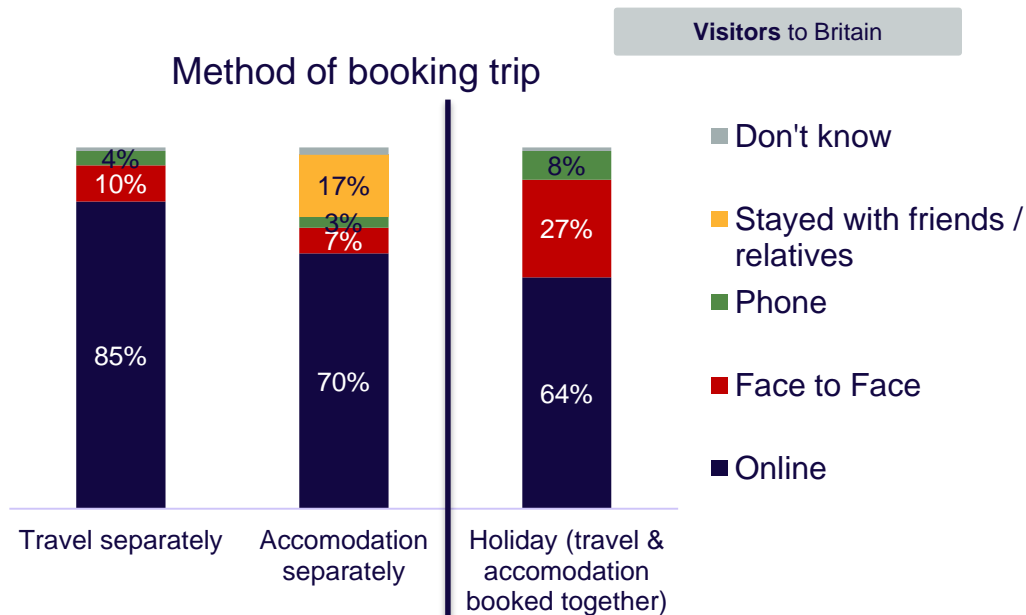
How did people book their travel and accommodation?

- Among those that have been to Britain, the booking process is split very much half in half.
- Visits from European markets are more likely to book travel and accommodation separately
- Over half of long haul travellers to the UK prefer to book the elements together (Aus and NZ are the exception)



How did visitors book their trip to Britain?

- Most bookings to Britain were done **online**.
- Around 1 in 6 visitors who booked accommodation separately **stayed with friends/relatives**.
- Over a quarter who booked a holiday did it **face to face**.
- **Australia, Germany, New Zealand, Russia, Spain, UAE** – over a third in these markets are booking their holidays face to face. Over half are doing so in Russia.
- 66% booked their holiday via laptop/desktop, 16% via smartphone, 10% tablet
- (NB this research was conducted online)





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