



VisitBritain™

# Foresight

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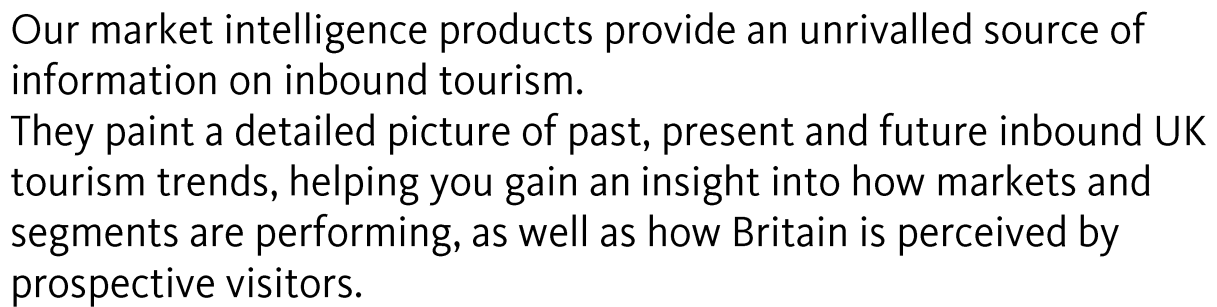
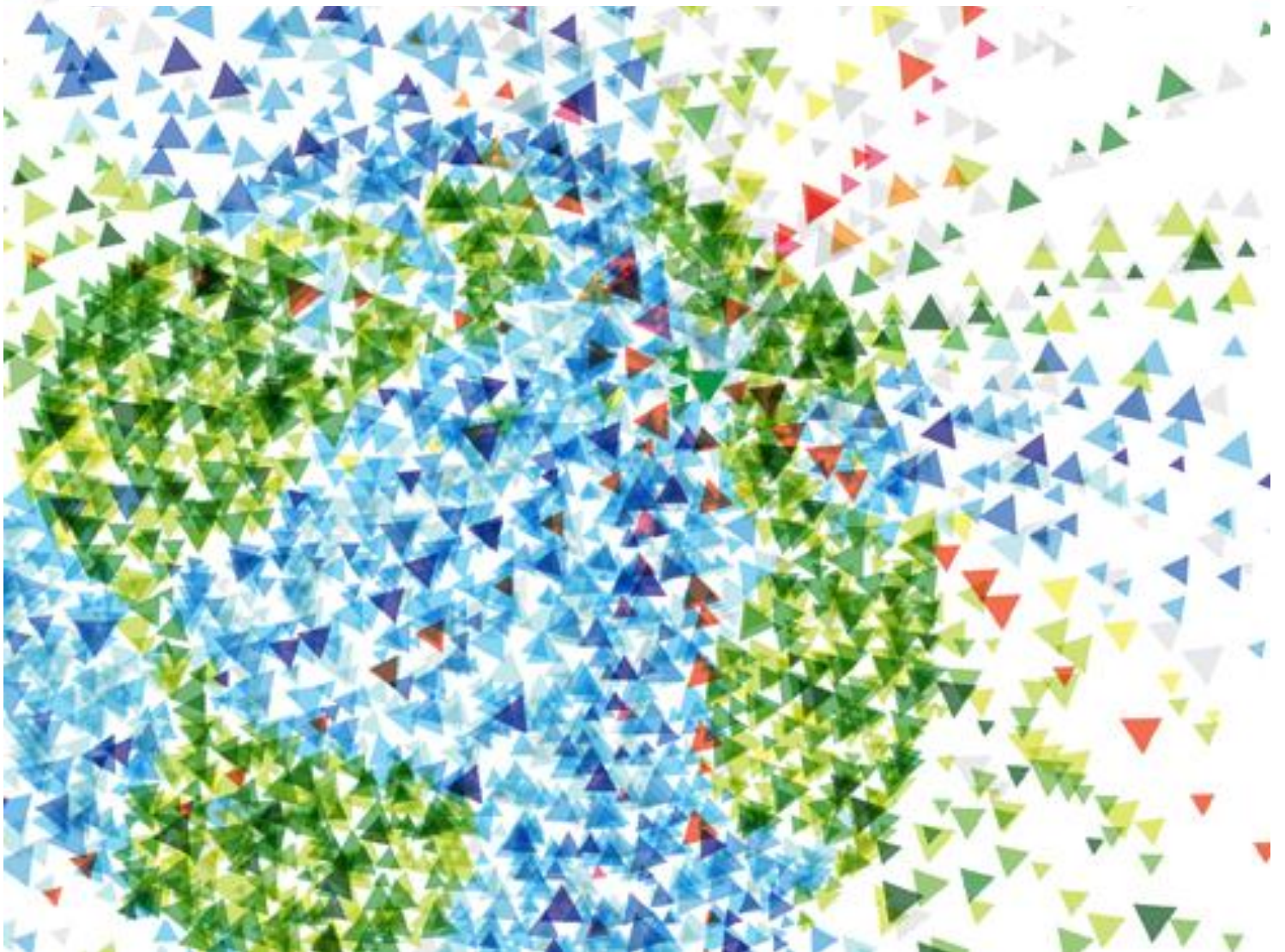
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Our market intelligence products provide an unrivalled source of information on inbound tourism. They paint a detailed picture of past, present and future inbound UK tourism trends, helping you gain an insight into how markets and segments are performing, as well as how Britain is perceived by prospective visitors.

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# Appeal of dream ‘only in Britain’ activities

## Summary

VisitBritain recently commissioned research to find out which of a raft of ‘only in Britain’ activities people around the world would most like to do if they came to Britain on holiday. Visiting Buckingham Palace was the most popular choice, followed by viewing London from the Shard or the London Eye and visiting Edinburgh castle.

### Top three dream ‘only in Britain’ activities

1. Visiting Buckingham Palace
2. Viewing London from the Shard or the London Eye
3. Visiting Edinburgh castle

These three activities appealed equally to men and women but visiting Buckingham Palace was even more popular amongst older respondents than younger.

Buckingham Palace was particularly appealing amongst those from Russia, the USA and Japan whilst viewing London from the Shard or the London Eye was a top choice for those from South Korea and visiting Edinburgh castle was appealing to those in established markets such as US and Canada as well as Italy.

For those who had visited Britain before Buckingham Palace remained the top choice but shopping on London’s Oxford Street jumped in to third place.

However, the findings show the wide range of activities Britain offers which appeal to potential overseas visitors, with no one activity dominating. Activities in different areas of Britain appeal, with those specific to London, Scotland, the North West, Wales and the South West all in the top ten (chosen by at least 15%).

Different types of activities also appeal with heritage, countryside, shopping, food and sport related activities appearing in the top ten.

## Heritage

Buckingham Palace and Edinburgh Castle were top choices in nearly all markets (the latter especially in the USA, Canada and Australia). Chatsworth House and gardens was a major draw for those in Russia and China where it came second only to Buckingham Palace, it was also a popular choice in the USA and Canada and amongst women more so than men. These activities were all more commonly chosen by those aged 30 or over than

younger respondents.

## Countryside

Spotting wildlife in the Scottish Highlands is a popular choice in major European markets France and Germany. Turkey, Japan and South Korea were the markets more drawn to a cruise in the Lake District whilst in India and South Africa respondents were more likely to select taking the mountain train up Snowdon. Walking in Yorkshire was most likely to be a draw for those in France and Italy (and notably more for men than women) whilst touring around the Cotswolds is particularly appealing in American markets Argentina, Mexico and Brazil.

Generally older respondents were more likely to choose countryside activities than younger visitors – especially the Snowdon mountain train and touring around the Cotswolds. Spotting wildlife in the Scottish Highlands was the most popular countryside option for younger respondents.

## Food

Eating fish and chips at the seaside particularly appeals in the USA, Canada and Australia whilst traditional afternoon tea and cakes is very popular in Japan and also South Korea. The latter also appeals more to women than men.

Dining by the fire in a cosy Welsh pub is a first choice activity for Swedes and top five for major markets Germany, France, Canada, USA and Australia as well as being more popular amongst those 40 or over than amongst younger respondents.

## Shopping

London’s Oxford Street was a popular choice in many markets, especially Egypt, Sweden, South Africa and Brazil. It was a more popular choice amongst women (second place) than men (eighth place). It is more of a draw for those aged under 50 than older visitors, and is especially a draw amongst those who do aspire to visit Britain.

## Sport

Going to a Premier League game was the second most popular activity overall amongst men (but the least favourite amongst women). It was more likely to be chosen in South Korea, Sweden and Turkey than in other markets (fourth or fifth choice in each) and more of a draw for those under 40 than older respondents.

## Study details

VisitBritain placed a proprietary question on a multi-country online study run by GfK during summer 2013 to gauge the relative appeal of specific activities amongst potential visitors from overseas. They were asked “If you went on a holiday to Britain which of the following activities would you most like to do?”, and were able to choose a first, second and third choice from the list shown in Chart 1. Where ‘first choice’ data is shown this adds to 100% (with all respondents having one first choice), and where ‘any choice’ data is shown (which is the main analysis in most of the report) this adds to 300% as all respondents are making three choices although they could select ‘none of these’.

The list of activities was designed to include aspirational, but relatively accessible activities, with a wide range in terms of where in Britain they are based (including four specific to London, two each to Scotland and Wales, six in different parts of England and three generic across Britain). The activities also include those which fall under the heritage, culture, countryside, food, shopping, sport, music and food ‘pillars’ of VisitBritain’s GREAT marketing campaign overseas. They are all ‘only in Britain’ or typically British holiday activities.

**Table 1 Holiday visits from markets in the study (2012, Office for National Statistics)**

	Number of holiday visits to UK (ooo)	% of all holiday visits to UK
France	1,717	14%
Germany	1,255	10%
United States	1,153	10%
Italy	730	6%
Australia	464	4%
Sweden	332	3%
Canada	230	2%
Poland	192	2%
Brazil	177	1%
Japan	130	1%
India	118	1%
South Korea	102	1%
Russia	92	1%
Argentina	79	1%
Mexico	64	1%
China	63	1%
South Africa	49	0.4%
Turkey	45	0.4%
Egypt	18	0.2%

Overall just under 10,000 respondents were interviewed, around 500 from each of 19 countries around the world. Respondents were representative of the online population in each market (so in terms of age and gender) but it is important to note that they are

not necessarily international travellers, i.e. they may not be particularly likely to actually visit Britain. Analysis below splits out the views of those who have visited Britain in the past, and those who would particularly like to visit Britain in future.

The views of consumers in 19 panel countries were included, as listed in Table 1. Altogether these countries account for almost three in five (59%) holiday visits from overseas to the UK, in 2012 totalling over seven million visits. The UK’s three largest markets (France, Germany and the USA) are covered, as well as sizeable markets Italy, Australia, Sweden, Canada and Poland. Views were also collected in emerging markets including the BRICs and South Korea. Understanding the types of activities which are most appealing for these potential visitors is therefore useful in developing attractive products and packages.

## Appeal of activities

### Overview

The draw of Britain’s heritage is clearly evident with Buckingham Palace and Edinburgh castle chosen by many potential visitors, as shown in Chart 1. Buckingham Palace was chosen by 30% of respondents, with all other activities selected by between 10% and 20%.

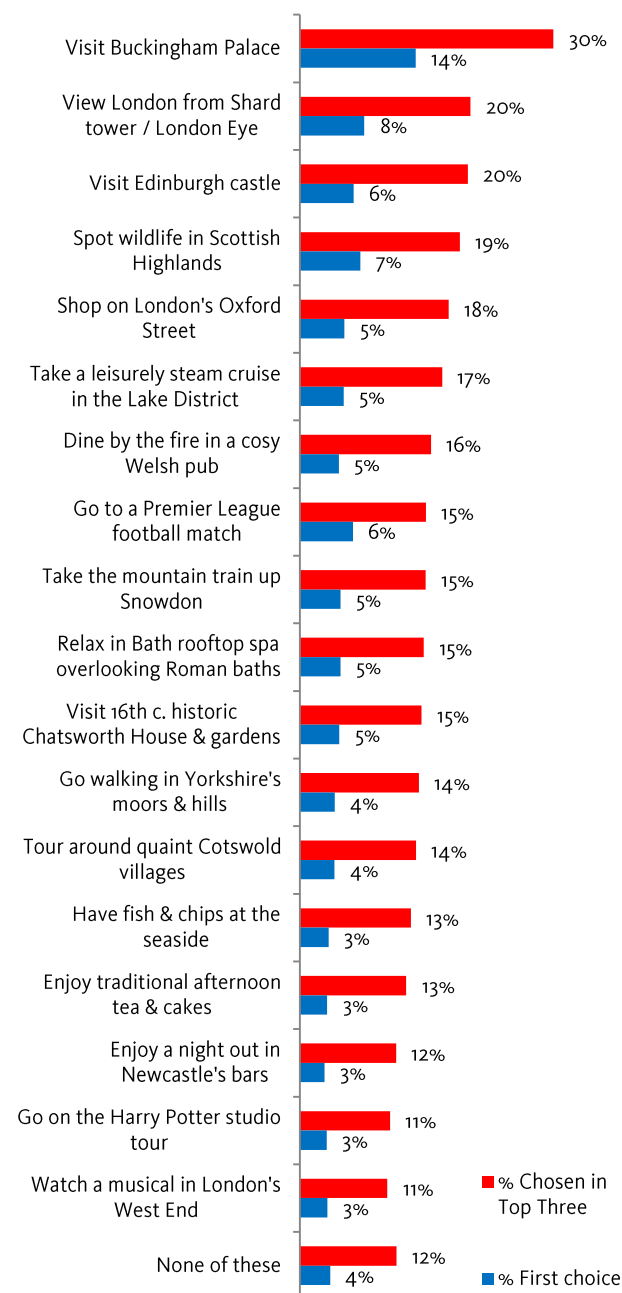
London’s iconic skyline and shopping are also popular choices, chosen by around one in five respondents.

Countryside activities also emerge as very appealing with spotting wildlife in the Scottish Highlands, taking a steam cruise in the Lake District or taking the mountain train up Snowdon selected by notable numbers.

Britain’s eating and drinking experiences are appealing for some with dining by the fire in a cosy Welsh pub the top food activity whilst having fish and chips at the seaside or traditional afternoon tea and cakes were a little less popular.

Whilst fewer respondents chose watching a musical in London’s West End, going on the Harry Potter studio tour or enjoying a night out in Newcastle’s bars these activities did appeal to some groups in particular as detailed below.

**Chart 1 Proportions choosing each 'Britain only' dream activity**



## Differences by market

Table 2 below shows the relative appeal of each activity amongst respondents from the different markets included in the study. The figures shown are the rank for each activity, based on the proportions who selected each as one of their three choices.

### European markets

Amongst the European markets in the study Sweden stands out as finding different activities appealing to the other markets,

Swedish respondents were most likely to choose dining by the fire in a Welsh pub as their ideal activity in Britain, and watching a musical in London's West-End (which was **least** popular in many markets) was the third most popular choice here.

Going to a Premier League football match was also notably a more popular choice amongst Swedes (ranked fifth).

Walking in Yorkshire's moor and hills, a night out in Newcastle's bars and having traditional afternoon tea and cakes were also particularly popular in Sweden whilst the more traditionally iconic British attractions such as Buckingham Palace and Edinburgh castle were less popular, indeed Sweden is the only market where both of these were not in the top five activities. This perhaps reflects the maturity of the Swedish market (some may have already visited the headline sights) but also the interest in Britain outside London and the appeal of short breaks for football, nightlife and culture.

France, Germany and Italy, three of Britain's major markets all rated Buckingham Palace highly, although in France the idea of spotting wildlife in the Scottish Highlands appealed more (and indeed this was also popular in Germany and Italy coming second and fourth respectively). Dining in a cosy Welsh pub, walking in Yorkshire and touring around quaint Cotswold villages also particularly appealed in these three markets. France was one of only four markets where going on the Harry Potter studio tour was a top ten choice.

In Russia and Poland the choice of activities largely mirrored the overall picture with Buckingham Palace the first choice activity. However, in Russia the second most popular dream activity was to visit Chatsworth House and gardens. Polish respondents were more likely than those in many markets to want to go walking in Yorkshire, relax in Bath's rooftop spa and tour round Cotswold villages.

The top choice from Turkish respondents was to take a leisurely steam cruise in the Lake District with relaxing in Bath's rooftop spa also a particularly popular choice in third place. Turkey was also one of the markets most likely to want to watch a Premier League match (their fifth choice).

### Established long haul English speaking markets

Buckingham Palace and Edinburgh Castle were the top two choices for those in the USA, Canada and Australia, emphasising the importance of built heritage (and royal connections) in these markets. Whilst viewing London from the Shard or the London Eye was the third choice in Australia this was not such a draw in the USA or Canada. Having fish and chips at the seaside was particularly appealing in all three markets (ranked third or fourth choice compared to 14<sup>th</sup> overall).

**Table 2 Rank for likelihood of each activity to be chosen by those in each market**

	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	S. Africa	S. Korea	Sweden	Turkey	USA
Visit Buckingham Palace	1	1	1	1	1	5	2	1	1	1	1	1	1	1	1	1	13	2	1
View London from Shard tower / London Eye	4	3	2	12	3	3	6	5	2	3	5	3	3	4	4	2	10	7	12
Visit Edinburgh castle	3	2	5	2	3	11	7	4	9	2	4	2	4	4	8	13	12	14	2
Spot wildlife in Scottish Highlands	2	13	4	6	14	8	1	2	4	4	13	4	2	3	7	17	17	4	7
Shop on London's Oxford Street	11	10	3	11	7	1	5	6	5	6	10	8	9	8	2	5	2	8	9
Take a leisurely steam cruise in the Lake District	10	7	12	5	15	7	8	14	6	10	3	9	5	6	5	3	4	1	14
Dine by the fire in a cosy Welsh pub	14	5	8	4	9	14	4	3	17	10	12	16	12	7	12	9	1	6	5
Go to a Premier League football match	7	11	9	16	10	6	13	10	7	13	8	7	10	9	9	4	5	5	17
Take the mountain train up Snowdon	6	7	7	6	6	4	11	16	3	15	5	5	11	13	3	18	15	12	8
Relax in Bath's rooftop spa over Roman baths	13	6	10	9	8	2	14	15	11	7	17	14	7	15	6	6	10	3	6
Visit 16th c. historic Chatsworth House & gardens	16	14	14	6	2	13	17	12	14	8	7	13	16	2	14	7	9	16	4
Go walking in Yorkshire's moors & hills	12	15	17	15	5	10	3	8	10	5	14	12	6	14	15	16	6	11	10
Tour around quaint Cotswold villages	8	11	6	9	11	12	9	7	14	9	15	6	8	10	16	15	16	10	17
Have fish & chips at the seaside	17	4	15	3	17	8	12	9	18	14	9	17	17	12	10	14	13	14	3
Enjoy traditional afternoon tea & cakes	9	18	12	13	12	17	16	18	13	10	2	11	18	11	17	8	8	12	11
Enjoy a night out in Newcastle's bars	5	17	11	14	13	18	15	11	8	15	18	15	15	18	13	12	7	9	13
Go on the Harry Potter studio tour	14	16	15	17	18	16	10	13	11	18	10	10	14	16	18	10	18	18	16
Watch a musical in London's West End	17	9	18	18	16	15	18	16	16	17	16	18	13	17	11	10	3	17	15

Dining by the fire in a cosy Welsh pub, taking the mountain train up Snowdon, relaxing Bath's rooftop pool overlooking the Roman baths and visiting Chatsworth House and gardens also were notably more appealing to those in Australia, the USA and Canada than those in most other markets.

Watching a musical in London's West End appealed more to Australians than those in all other markets (apart from Sweden), with it just making their top ten.

### Asian markets

Buckingham Palace was number one choice in all the Asian markets included in the study with viewing London from the Shard or the London Eye a popular choice in all Asian markets too, especially South Korea and India where it was ranked second. Whilst Edinburgh Castle was third and fourth choice respectively in China and Japan it was less likely to appeal to those in South Korea or India.

Second choice for those in China was visiting Chatsworth House and gardens, also more popular in Japan and South Korea than in most other markets (apart from Russia).

Amongst Japanese respondents having traditional afternoon tea and cakes was a very popular choice, coming second overall. It was also more appealing to those in South Korea (where it came eighth) than to those in most other markets in the study.

Going on the Harry Potter studio tour was a top ten choice for those in Japan and South Korea (mirroring previous research which saw visiting Harry Potter film locations particularly a draw for South Koreans).

Taking a leisurely steam cruise in the Lake District was third choice amongst those in Japan and South Korea whilst taking the train up Snowdon was more popular in India and walking in Yorkshire the top countryside option for the Chinese (fifth overall).

### Latin American and African markets

Those in Argentina, Mexico and Brazil largely had the same top choices as seen overall, although in Brazil going shopping on London's Oxford Street was notably more popular than in some other markets – their third choice. Touring around quaint Cotswold villages was also a particular draw in these three markets. Argentineans were the most likely to say they would want to enjoy a night out in Newcastle's bars, their fifth choice.

Shopping on Oxford Street was the most popular activity for those in Egypt, and second choice for those in South Africa. Taking the mountain train up Snowdon was also a particular draw in both markets, coming third amongst South Africans and fourth amongst Egyptians.

Relaxing in Bath's rooftop spa overlooking the Roman baths was second choice in Egypt – this activity more popular here than in any other market.

## Differences by demographics

### Differences by age

If choices of activity are broken down by age group it is clear that some appeal more to younger people than older and vice versa, as shown in Chart 2. Those aged under 30 in particular are drawn by different activities.

Built heritage attractions are generally more popular amongst older visitors. Although across all ages visiting Buckingham Palace remains top of the list, it is much more favoured by those aged 30 or over (chosen by around a third) than younger respondents (chosen by only a quarter). Edinburgh castle is also a more popular choice amongst older respondents than younger - second or third choice for those aged 30 or over but dropping to sixth place for those aged under 30. Similarly Chatsworth house was more likely to be a selection for those aged 30 or over.

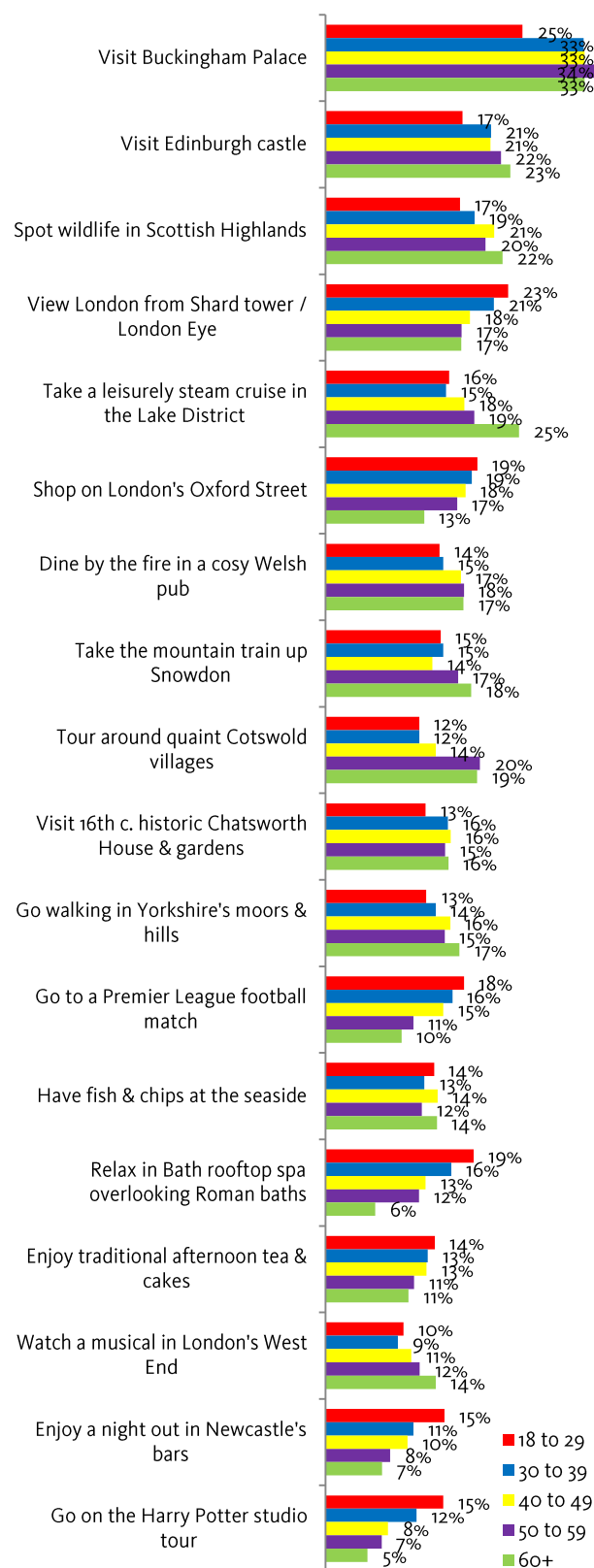
Countryside based activities on the whole appealed more to older visitors with spotting wildlife in the Scottish Highlands, a steam cruise in the Lake District, touring around Cotswold villages, the train up Snowdon and walking in Yorkshire all more likely to be chosen by older visitors – especially the latter two activities which were more popular with the 50 plus age group.

Dining by the fire in a cosy Welsh pub also appealed more to older visitors whilst those under 30 were far more likely to say they would go on a night out in Newcastle's bars. Other food and drink activities (afternoon tea and fish and chips) saw little difference between age groups.

London based attractions came out strongly amongst younger respondents, with seeing the view over London from the Shard or London Eye the second choice for those aged under 40 and shopping on London's Oxford Street a top five choice for those aged under 50 but of less interest to older visitors. However, watching a musical in London's West End did appeal more to older respondents than younger.

Younger people aged under 40 were more likely to choose going to a Premier League football match (fifth choice for those under 30 and seventh for those in their 30s), relaxing in Bath's rooftop spa pool (fourth choice for those under 30 and seventh choice for those in their 30s) or going on the Harry Potter studio tour (three times as many of those under 30 than those aged 60 or over).



**Chart 2 Activities chosen by age band****Differences by gender**

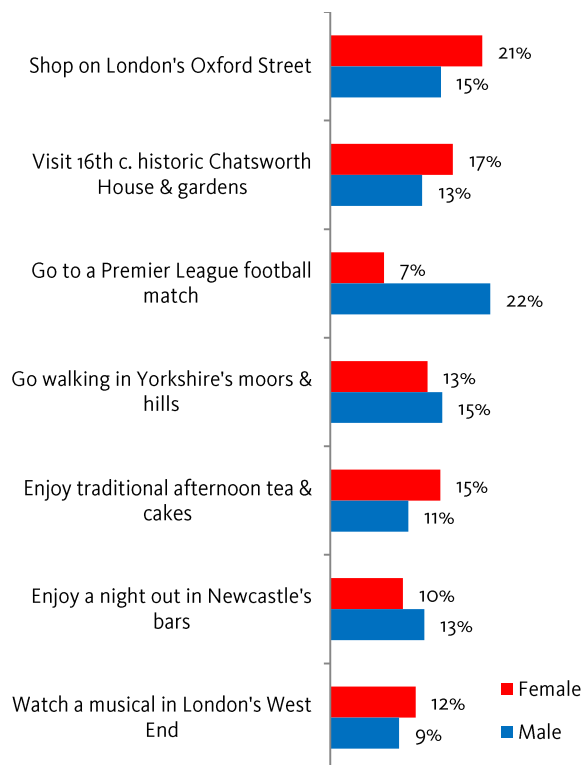
Across most activities there were few notable differences in how likely men or women were to select them, those which did see differences are pulled out in Chart 3 below.

The most marked difference is in interest in watching a Premier League football match, an activity chosen by three times more men than women, making it second choice amongst men but last choice amongst women.

Shopping on Oxford Street also saw a marked difference between the genders – the second favourite activity amongst women, chosen by 21%, but eighth placed amongst men.

Visiting Chatsworth House and gardens was more of a draw for women than men, chosen by 17% of women making it their seventh most likely choice whilst for men it was towards the bottom of the list coming 15<sup>th</sup>. Women were a little more likely than men to want to watch a musical in London's West End whilst men were more likely than women to want to go walking Yorkshire.

Women also liked the idea of enjoying traditional afternoon tea and cakes whilst men would prefer a night out in Newcastle's bars.

**Chart 3 Activities where choice varies by gender**



## Differences by experience of and interest in Britain

### Attracting first time and return visitors

We can split out respondents according to whether they had previously visited Britain or not, those who had visited includes those who had visited for business as well as those visiting for leisure (although the latter make up the majority). It is worth noting that we do not know how long ago they visited so some may be considering new activities after a recent trip and others re-visiting sights they had seen some time ago.

Whether respondents had visited Britain previously or not Buckingham Palace and the view over London from the Shard or the London Eye were the top two choices although fewer previous visitors (25%) would choose Buckingham Palace than those who would be first time visitors (30%), as shown in Chart 4 below. Buckingham Palace is far more dominant a draw in the eyes of those who have not visited, with second choice viewing London from the Shard or the London Eye voted for by 9 percentage points fewer whilst amongst previous visitors the difference is only three percentage points. Indeed previous visitors were more likely to choose many activities than those who had not visited, seemingly being more open to a range of activities with 15% or more choosing twelve activities compared to only six activities being chosen by 15% or more of those who have not visited. Only 4% of previous visitors would choose none of the activities compared to 11% of non-visitors.

First time visitors would be more likely than returners to choose visiting Edinburgh castle, taking the mountain train up Snowdon, relaxing in Bath's rooftop spa or a lake cruise in the Lake District.

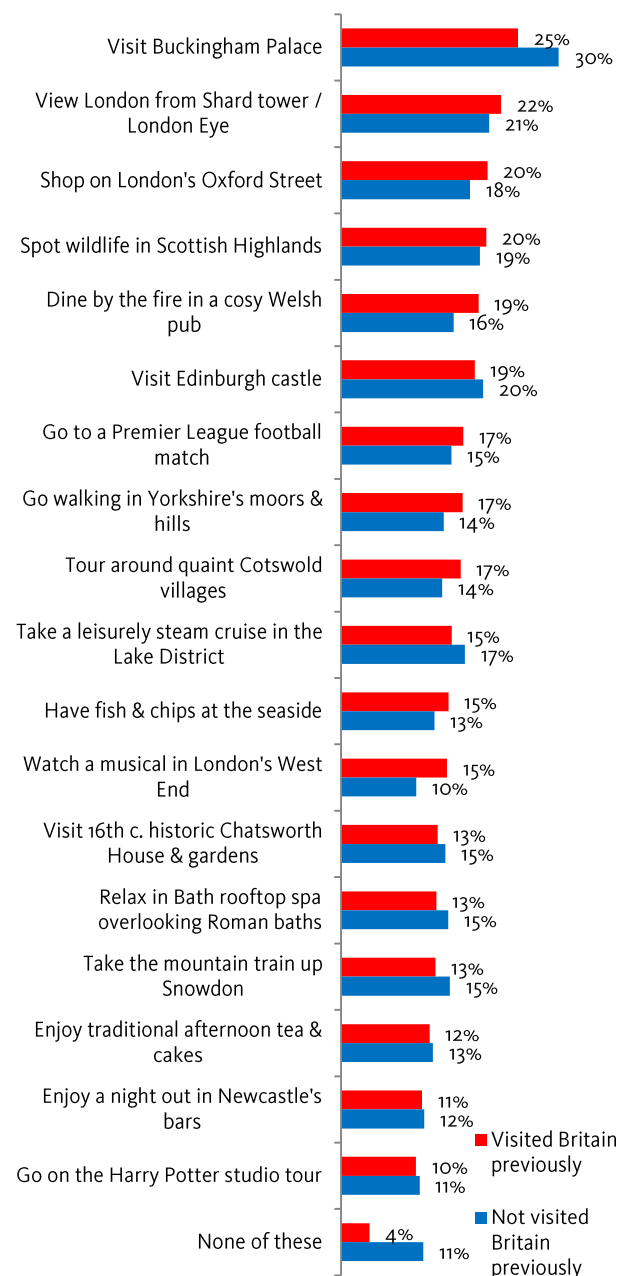
Those who had visited Britain previously and so would be a return visitor were more likely to select shopping on Oxford Street (third place), or dining by the fire in a cosy Welsh pub (fifth place) as well as being notably more likely to choose walking in Yorkshire and touring around Cotswold villages. However, the most notable difference was in interest in watching a musical in London's West End – coming out 12<sup>th</sup> place amongst previous visitors.

### Those who want to visit Britain in future

As part of the study respondents were asked the extent to which they would like to visit Britain if money were no object, i.e. their aspiration to visit regardless of whether practically and financially they would be in a position to do so. Comparing those who said they would like to visit Britain in the future (those who said five, six or seven on a seven point scale where one equalled 'strongly not like to visit' and seven equalled 'strongly like to visit') with those who were not interested there were relatively few differences in the activities chosen.

The most marked difference was in the proportion who would want to shop on London's Oxford Street – this was much more of a draw for those who did aspire to visit Britain (chosen by 18%, fifth favourite activity) than those who did not (chosen by 13% and ranked 13<sup>th</sup> favourite activity).

**Chart 4 Choice of activities from those who had previously visited Britain and those who had not**



## London and Beyond

Several of the listed activities are specific to London (Buckingham Palace, the view from the Shard or London Eye, Oxford Street and a musical in the West End) and although it is not possible to pick apart whether the appeal lies in the nature or the location of the activity there is a pattern with those in emerging long haul markets South Korea, South Africa, India, Brazil, Egypt as well as Australia more likely to have selected London based activities whilst those in mature markets Canada, USA, Sweden and France (as well as Turkey) were less likely to have done so. This could perhaps be due to higher awareness of London than the rest of Britain in some of these markets.

The activities based specifically in Scotland (Edinburgh Castle and spotting wildlife in the Highlands) were most likely to be chosen by those in Germany, Poland, Italy, Argentina and Mexico with France, Russia, Canada, Brazil and the US following. Those in Wales (dining in a cosy pub and taking the train up Snowdon) were most popular in the USA, Australia and Canada.

Swedes were more likely than those in other markets to choose activities in Northern England (Premier League football, Newcastle's bars, walking in Yorkshire and Chatsworth House), reflecting the typical greater knowledge and links with Northern England in Scandinavian markets than elsewhere (around 45,000 visits from Sweden each year involve watching football in Britain).

## Further information and research

VisitBritain has sponsored questions on the International Passenger Survey (Office for National Statistics) to find out how many visitors actually participate in different activities when they visit Britain, for example visiting castles, watching football or going to the pub. This and other resources are linked to from the [Attractions](#) page on our website

Also see our report profiling the types of activities visitors to different areas of Britain undertake, [Regional Report](#)

VisitBritain asked a similar question in 2010, with a different list of activities. The findings are available here, [Foresight 87](#)

Also view our flagship [Market Profile reports](#) for over 20 markets, which include in-depth coverage of the types of activities visitors from different markets typically do in the UK and much more.

### Table 6 Data Sources

Source	Charts/Tables
Office for National Statistics, International Passenger Survey, 2012	Table 1
VisitBritain proprietary questions, GfK Anholt Nations Brand Index, July 2013	All other tables and charts



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