



FORESIGHT is a monthly commentary on significant issues within the tourism sector. In this special edition we take our first look at the results of two new questions that VisitBritain sponsored in the Office for National Statistics 'International Passenger Survey' in 2006, covering activities undertaken during the visit to Britain and the composition of the respondent's travelling group.

Setting the scene

The International Passenger Survey¹ has for a long time been our primary source of market intelligence regarding inbound visits to Britain, but in 2005 VisitBritain recognised that it could improve the usefulness of the survey to those responsible for marketing Britain by adopting a fresh approach to the questions that VisitBritain sponsors each year. This month Foresight presents our first set of findings. Being an annual survey there is some considerable time lag between deciding on the need for new questions and getting the results – indeed VisitBritain formalised our new questions in February of 2005 for inclusion in the 2006 survey, with full year final results only released by the Office for National Statistics in August 2007.

The new questions that VisitBritain has sponsored will enable us to gain a far deeper insight into who accompanies our 32 million inbound visitors and what it is they do during their visit. The 'travelling group' and 'activities' questions that we asked in 2006 are set out in the following table, note that questionnaire length prohibits the inclusion of an exhaustive list of activities, so VisitBritain are sponsoring a question focussing on a different set of activities in the current annual survey, and will include a further set during 2008 – see the 'Future Plans' section at the end of this month's edition of Foresight for more details. Both questions allow 'multiple responses', meaning that we need to be careful in some of our interpretations as discussed below.

Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?	During your visit to the UK, which of the following activities did you take part in?
Travelling on own	Visiting castles, churches, monuments, historic houses
Spouse/partner	Visiting parks, gardens
Child(ren) aged 0-4	Zoos, aquarium, other wildlife
Child(ren) aged 5-11	Going to theatre, ballet, opera, concert
Child(ren) aged 12-17	Museums, art galleries
Adult Friend(s)	Sports activities
Adult Family Member(s)	Shopping e.g. fashion, design, home, antiques
Business colleague(s)	Nightclubs
Part of a Tour Group	Visiting coastline, countryside
	Visiting literary, music, TV, film locations
	Watching sport event
	None of these

Looking at the results it appears as though respondents understood that the questions were 'multiple response', that is to say as few or as many options could be applicable depending on the respondents own trip circumstances.

However, the 'travelling group' results do need to be treated with some caution, as even if a respondent says they are travelling with 'Spouse/Partner' and 'Child(ren) aged 5-11, we don't know from this how many children were in the group, or even that the children were those of the respondent, for example they could be grandchildren, nieces and nephews or even no blood relation at all.

There is some evidence that those responding to the 'travelling group' question by saying they were part of a 'Tour Group' did not elucidate fully the mix of travelling companions detailed elsewhere on the list of possibilities.

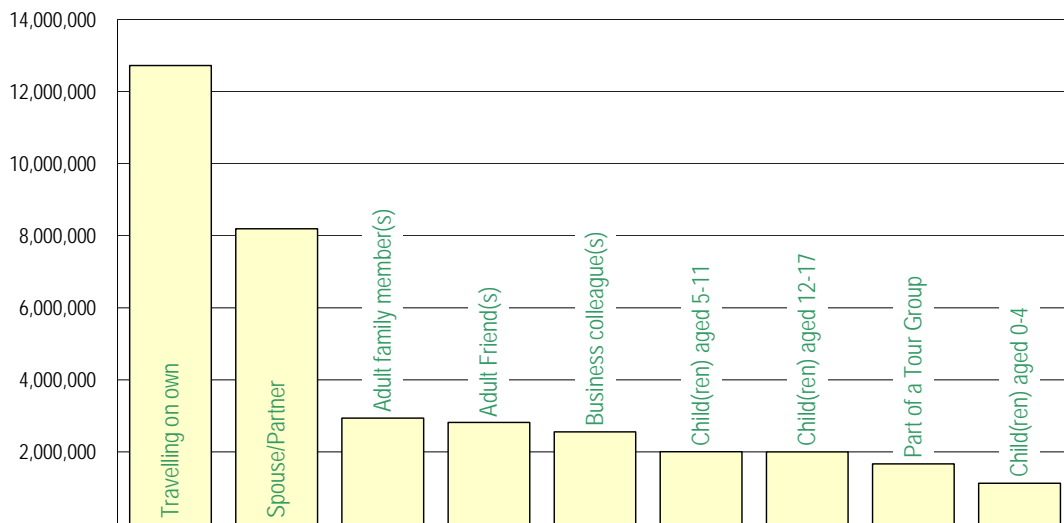
With such a rich dataset even before the inclusion of these new questions it is only possible to scratch the surface of what is now available here, but the findings definitely paint a fascinating picture of who visitors come to the UK with, and what they get up to during their stay.

Travelling companions

The following chart indicates that over 12 million, or 39%, of inbound visitors in 2006 were travelling alone, with one-in-four travelling with a spouse or partner (some of whom were travelling with other companions too). Less than two million visitors (5%) were travelling as part of a tour group.

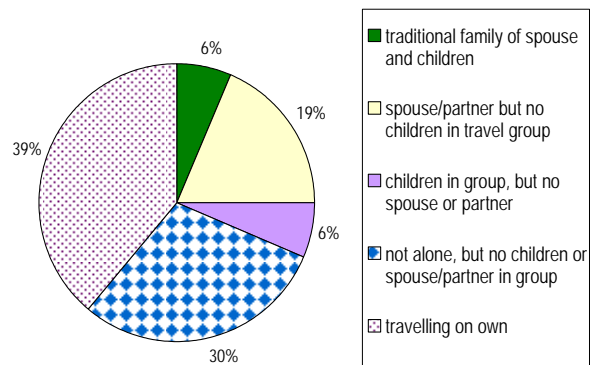
Travelling companions

(multiple responses allowed)



To overcome the fact that a mix of different travel companions could be in each group, five mutually exclusive 'group types' have been created. These are 'traditional family of spouse/partner and children' (though reiterating the point made earlier, we cannot be sure that these are the children of the adults travelling), 'spouse/partner, no children', 'children in group, but no spouse or partner', 'other adults (friends, family or business colleagues), but no spouse/partner or children' and 'travelling alone'.

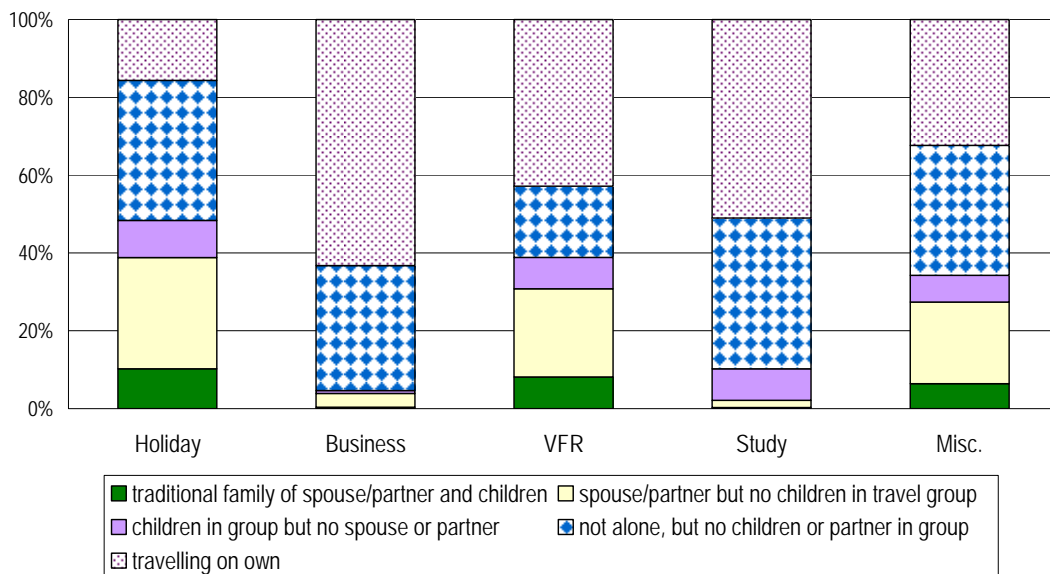
Travel Groups



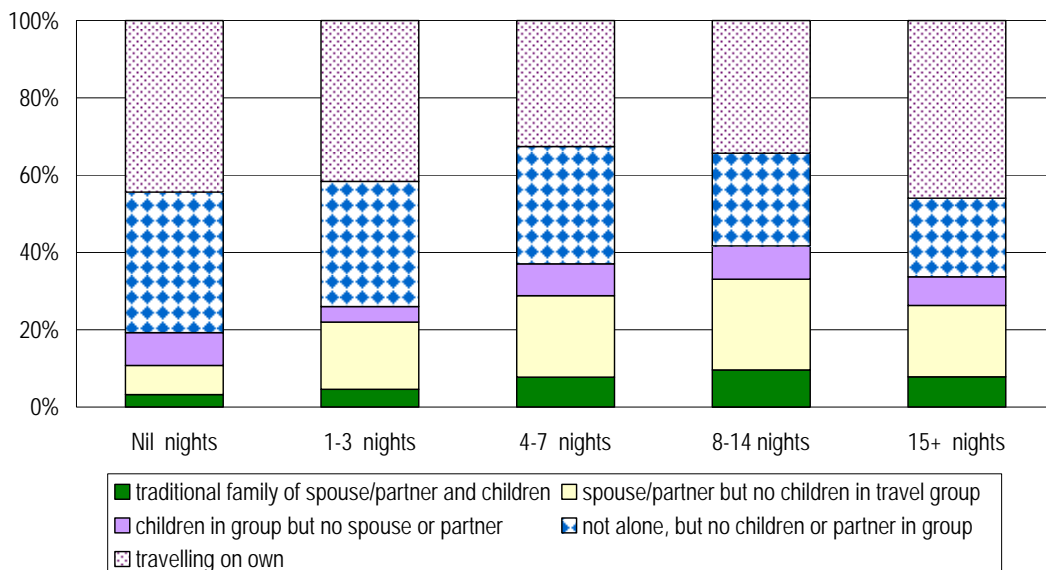
The pie chart indicates that after the 'travelling on own' group, the next largest segment is those who are travelling with adults (excluding a spouse/partner) but not with children – so the other adults can be friends, family members or business colleagues. The following charts adopt this 'simplified' grouping for types of travel group.

First let us look at the purpose of visit for each travelling group. It is evident there are some notable differences: those travelling with their spouse/partner and those with both spouse/partner and children in the travel group are most likely to be on holiday, whereas those travelling alone are overwhelmingly here for business (more than 60% of all business visits are undertaken with no companions). The picture for trips to visit friends and relatives is similar to that for holidays, but with an increased probability that the visitor will be travelling alone and lower probability that he or she will be travelling with adults who are not their spouse/partner.

Group composition by trip purpose



Group composition by duration of trip



The second chart on the previous page reveals that those travelling by themselves are most likely to be visiting Britain for either a very short or a very long duration, with those accompanied by their spouse/partner and/or children representing a more important segment for trips that last between 4 and 14 nights.

Travel group by market

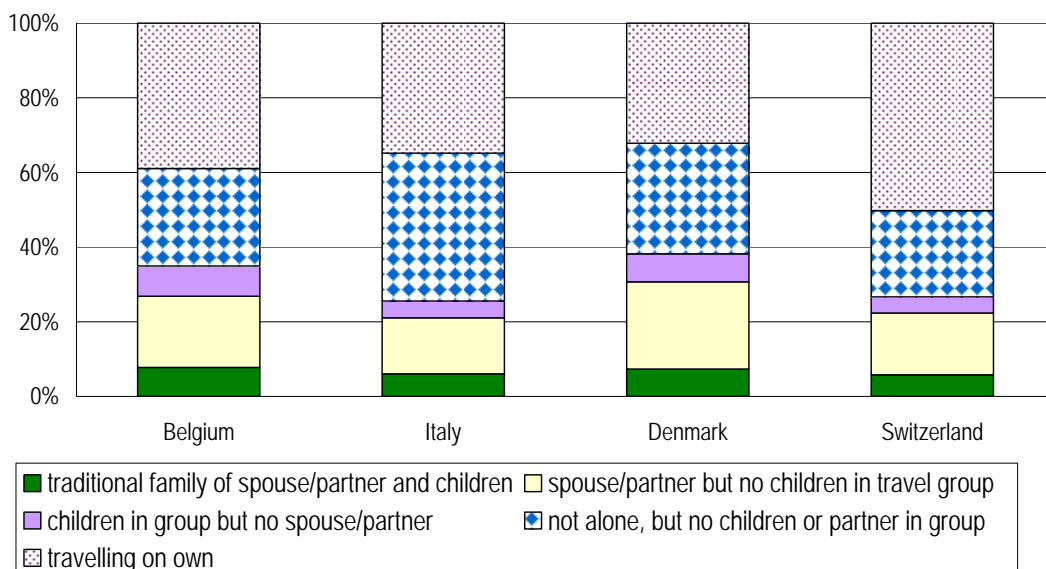
The table and following series of charts provide a feel for what we can learn about individual markets from the 'travel group' information now available.

Most and least likely to be in stated travel group		
Travel Group	Most likely	Least likely
Traditional family of spouse/partner and children	UAE	Poland
Spouse/partner but no children in group	Australia	South Korea
Children in group but no spouse/partner	France	Japan
Not alone, but no children or partner in group	South Korea	UAE
Travelling on own	UAE	South Korea

So, the major market most likely to have a travel group composed of a spouse/partner plus children is the United Arab Emirates, whereas visitors from Poland are the least likely to be travelling with these types of companions. Interestingly the UAE is also the market where we are most likely to find visitors travelling on their own, note however, that many UAE visitors are in fact British ex-pats who work long-term in the UAE.

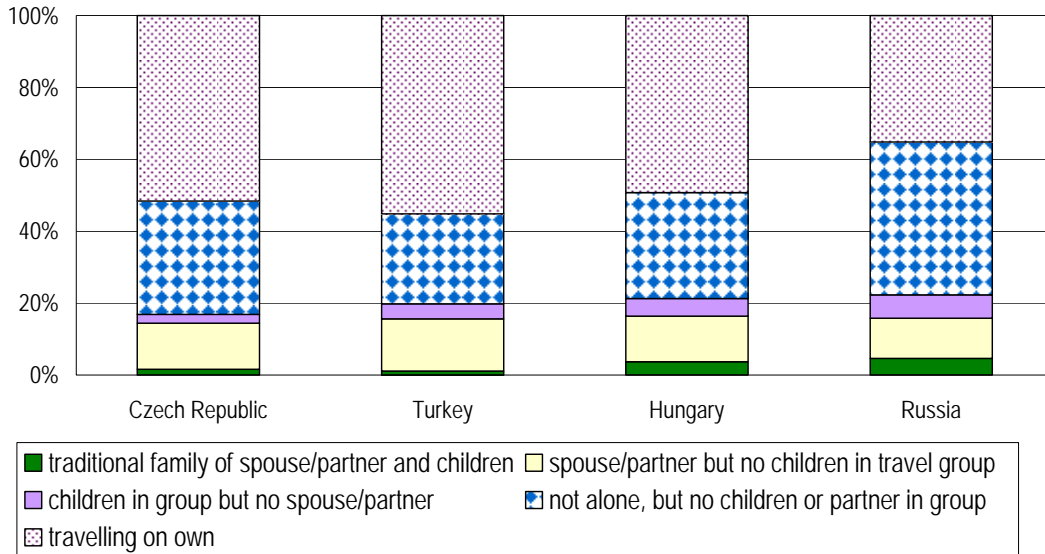
The charts show the travel group composition for sets of four markets, with these being established short-haul, emerging short-haul, established long-haul and emerging long-haul respectively. Among the four established short-haul markets visitors from Denmark are the most likely to be travelling with their spouse and/or children, whereas visitors from Italy are most likely to be travelling with other adults but no spouse/partner or children.

Group composition - established short-haul markets



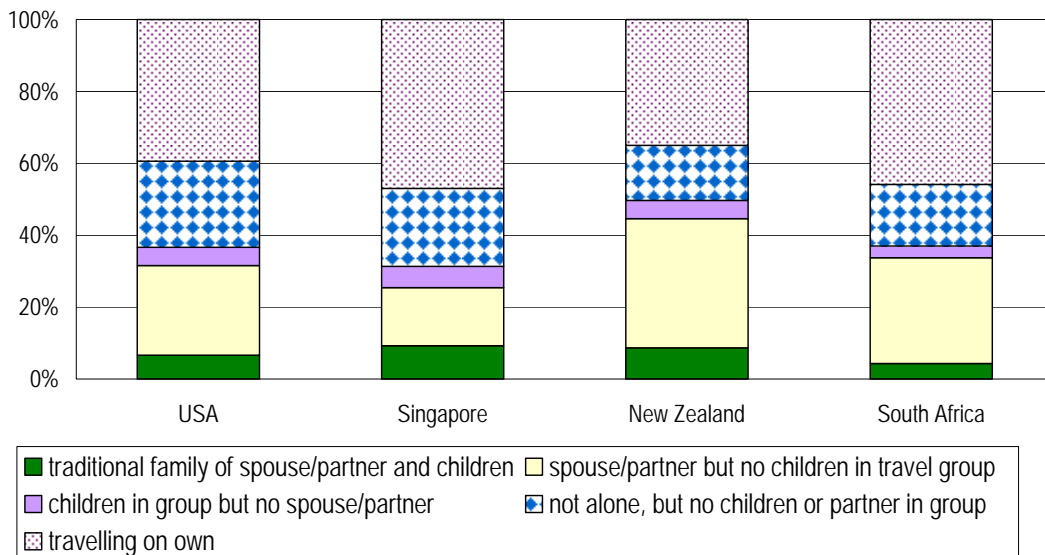
Turning to emerging short-haul markets the notable points for the four markets covered include the very high proportion of visitors from Turkey who are travelling alone and the high tendency for visitors from Russia to be travelling with other adults but not their spouse/partner or any children.

Group composition - emerging short-haul markets



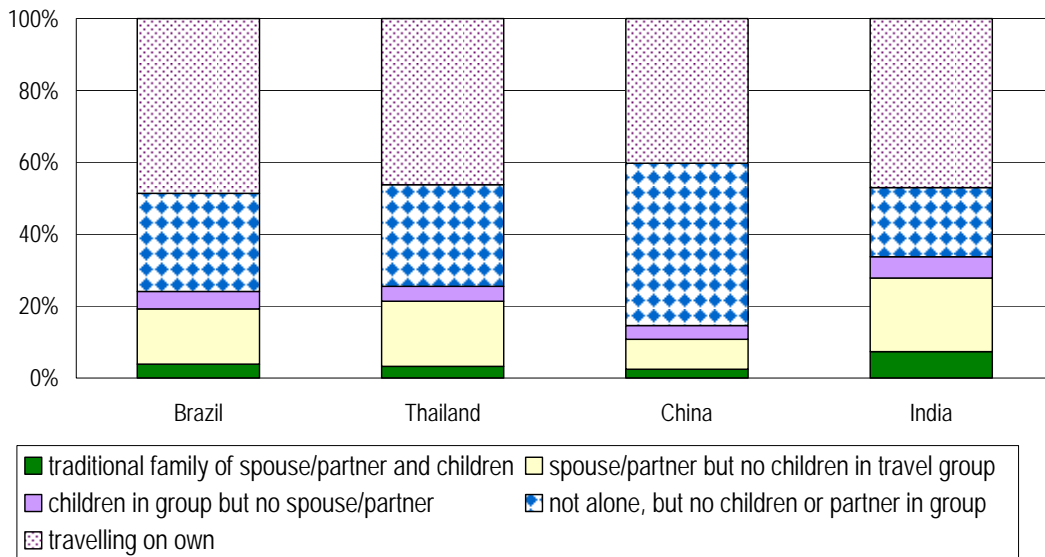
New Zealand stands out among the four established long-haul markets covered in the next chart as having a particularly high tendency to include travel groups composed of a spouse/partner but no children, whereas visitors from Singapore and South Africa are more likely to be travelling alone.

Group composition - established long-haul markets



The final set of four markets termed 'emerging long-haul' contrast notably with some of their established long-haul counterparts, with China standing out as having a high proportion of visitors who are travelling with other adults, but not a spouse/partner or children.

Group composition - emerging long-haul markets

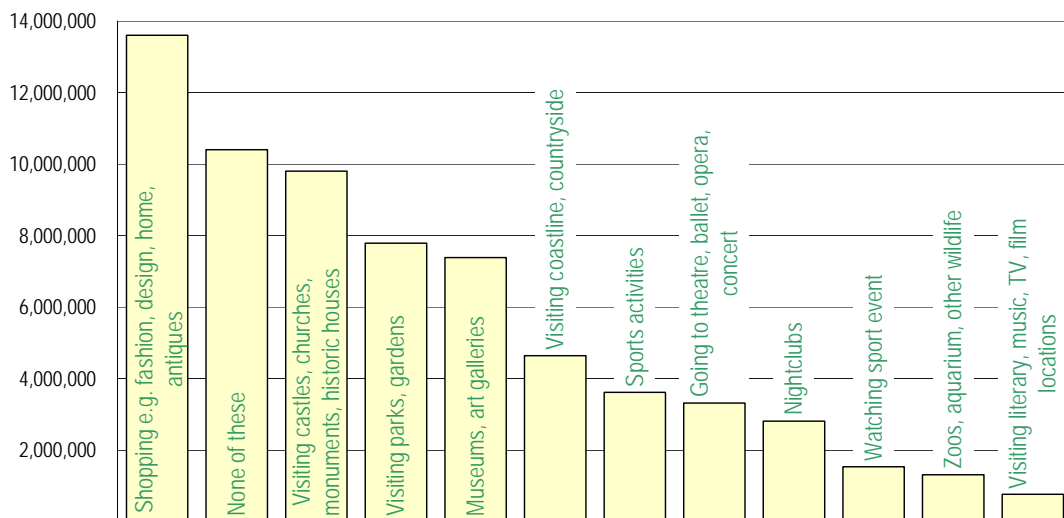


Activities

We can see from the following chart the number of visitors who said they undertook each of the listed activities during 2006. Shopping (for fashion, design, home or antiques) stands out as being the most popular activity, with 42% of visitors saying they did this. However, one-third of visitors did not undertake any of the listed activities. Visiting castles, churches, monuments or historic houses was an activity enjoyed by three out of every ten visitors in 2006, with nearly one-quarter of visitors going to parks or gardens, and to museums or art galleries. Visiting literary, music, TV or film locations is clearly a niche activity, with just 2% of visitors actively doing so in 2006.

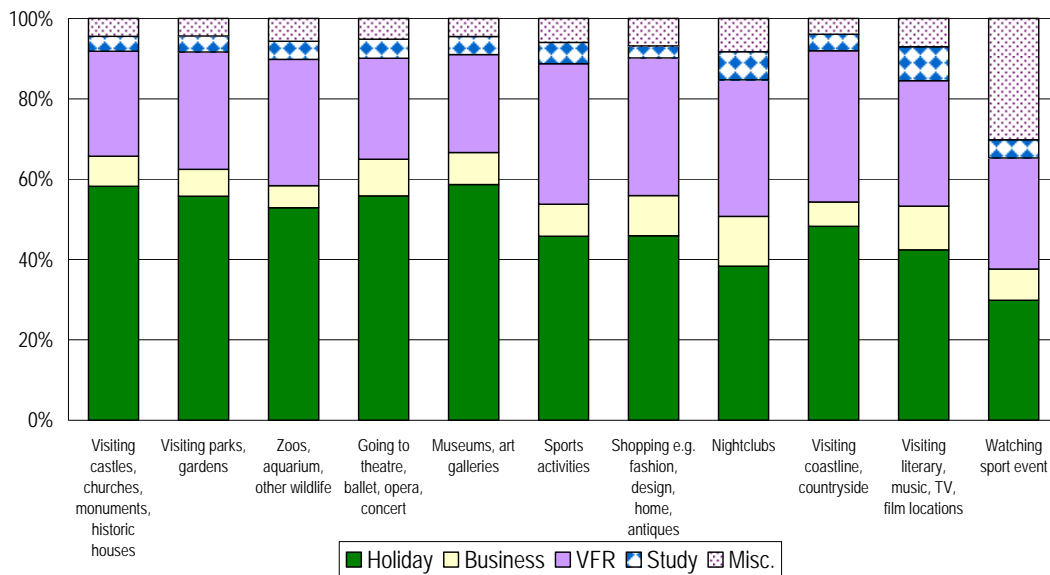
Activities undertaken during visit in 2006

(multiple responses allowed)

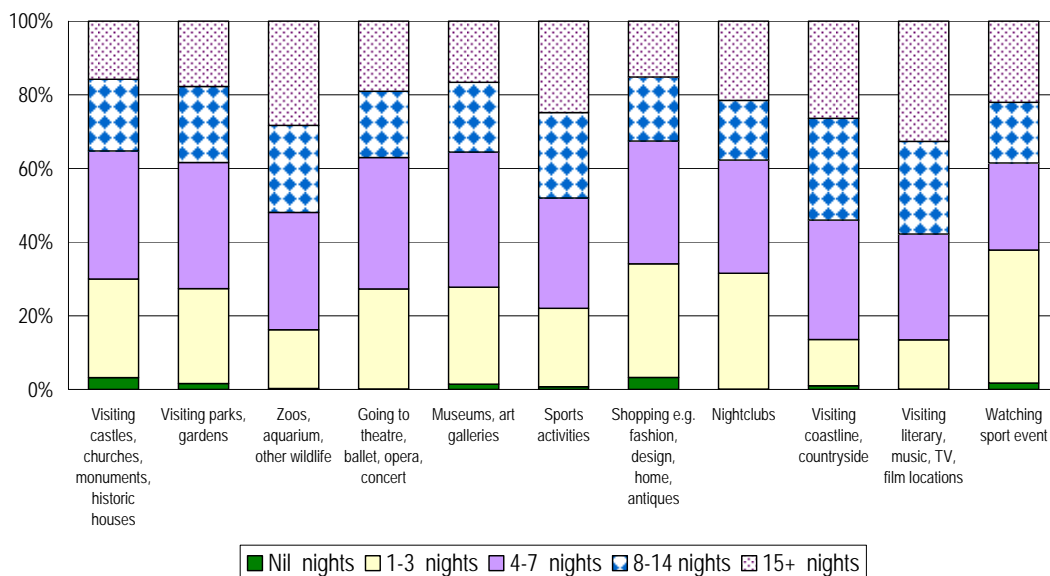


The picture by journey purpose is shown in the next chart, with holiday-makers being well represented across all of the activities, especially those such as visiting museums and art galleries or castles, churches, monuments and historic houses. Only around a quarter of those who watched a sporting event were on holiday, with a further quarter doing so having a 'miscellaneous' journey purpose – and we can surmise that coming to see the event was probably the motivating factor for visiting Britain. Visitors who come to Britain to see friends or relatives definitely take part in traditional 'tourist' pursuits, with around a quarter of all visitors to zoos, aquariums and other wildlife attractions and more than one-in-three of those taking part in a sporting activity here to visit friends and relatives. Although only a small proportion for each activity, a minority of business visitors clearly do undertake leisure activities during their stay.

Proportion undertaking activity by trip purpose



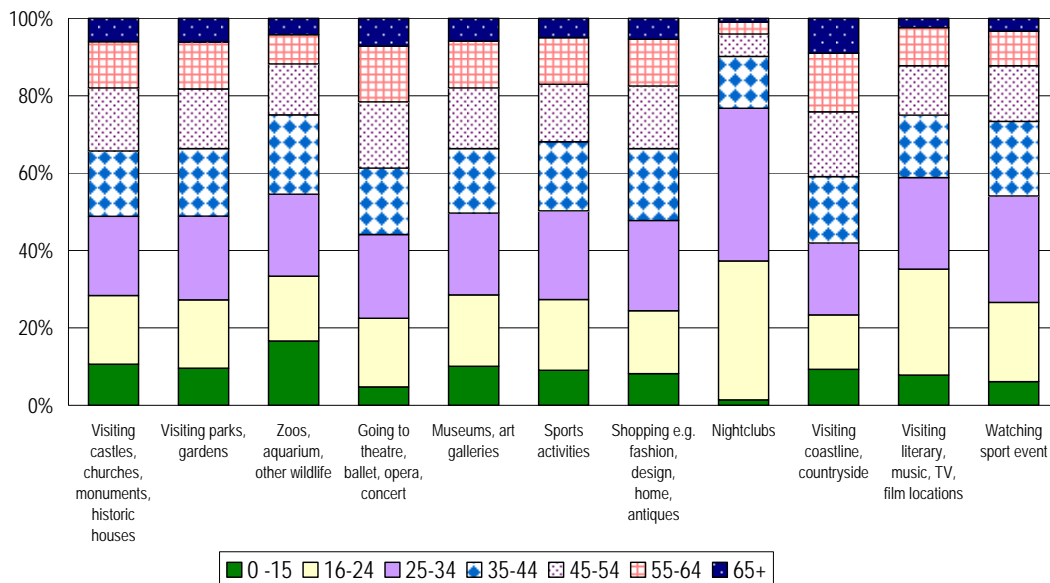
Proportion undertaking activity by duration of visit



The second chart on the previous page looks at the duration of stay for visitors participating in each of the activities. Here we find that those staying for 8 or more nights are the most likely to visit coastline and countryside, and to visit literary, music, TV or film locations, whereas those watching a sporting event or shopping for fashion, design, home or antiques are particularly likely to be short-stay visitors.

What about the age distribution for visitors enjoying each activity? The next chart tells us that one of the activities most likely to be done by those under fifteen is visiting zoos, aquariums and other wildlife attractions, those aged 16-24 are very likely to visit nightclubs and those over 55 years of age represent a quarter of those visiting the coastline or countryside.

Activities undertaken by age band of respondent



Activity information by market

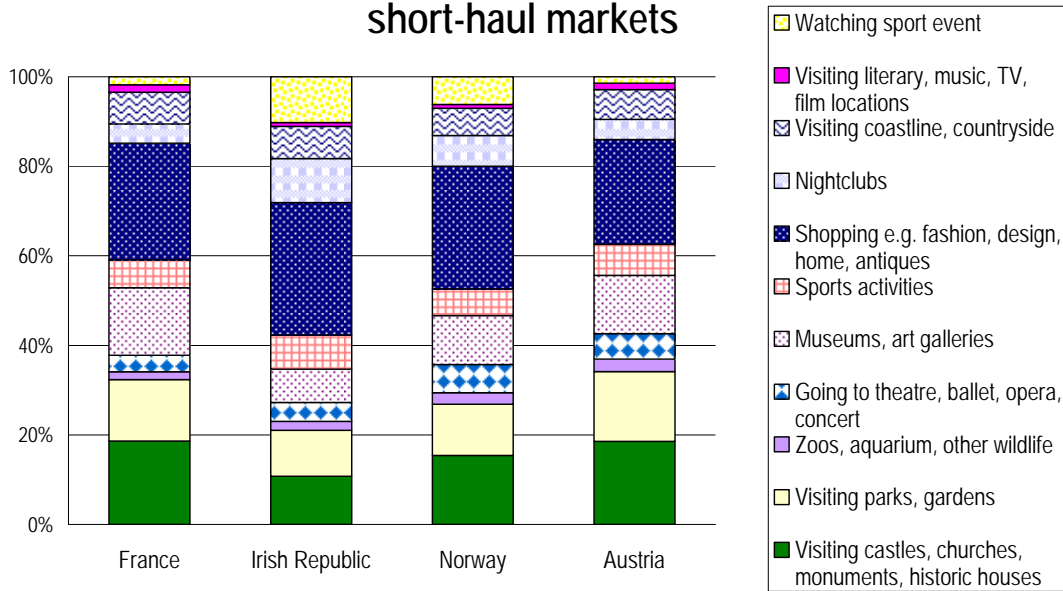
The table and following series of charts provide a feel for what we can learn about individual markets from the 'activities' information now available. South Americans and Kiwis feature heavily in the 'most likely' column, emphasising perhaps that those travelling the furthest to get to Britain are keen to do lots of different things during their stay.

Most and least likely to undertake activity		
Activity	Most likely	Least likely
Visiting castles, churches, monuments, historic houses	Argentina	Irish Republic
Visiting parks, gardens	Argentina	Irish Republic
Zoos, aquarium, other wildlife	UAE	Belgium
Going to theatre, ballet, opera, concert	Brazil	Czech Republic
Museums, art galleries	Argentina	Irish Republic
Sports activities	Argentina	China
Shopping e.g. fashion, design, home, antiques	New Zealand	Czech Republic
Nightclubs	Brazil	China
Visiting coastline, countryside	New Zealand	Mexico
Visiting literary, music, TV, film locations	New Zealand	Thailand
Watching sport event	Norway	Thailand

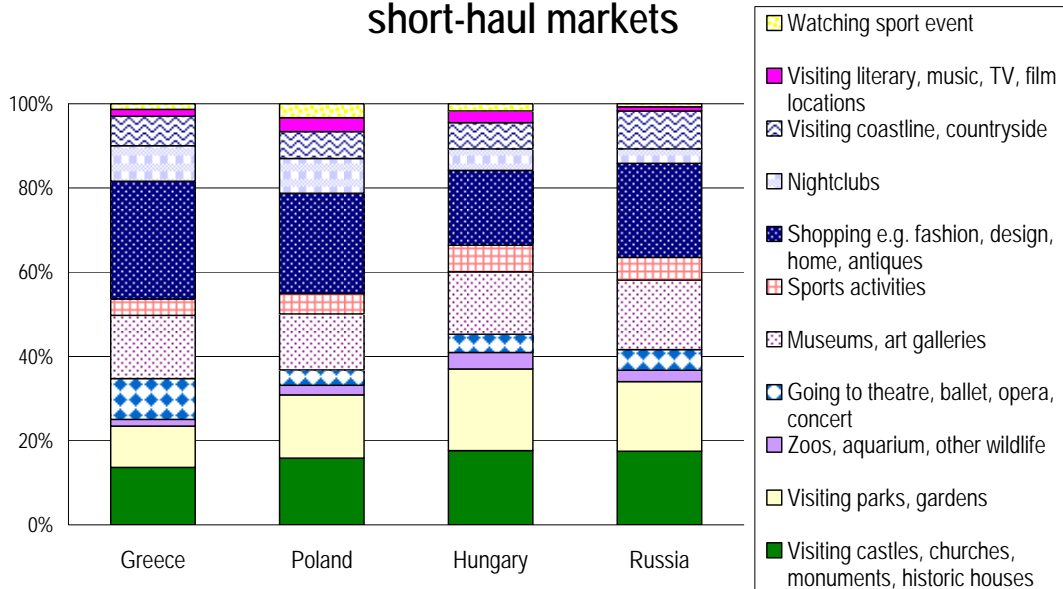
The charts show the proportion of visitors for selected markets who undertake each activity for sets of four markets, namely established short-haul, emerging short-haul, established long-haul and emerging long-haul respectively. Among the four established short-haul markets visitors

from France are far more likely to be found visiting castles, churches, monuments or historic houses than are visitors from the Irish Republic, whereas visitors from Ireland are far more likely than those from Austria to watch a sporting event.

Activities undertaken by visitors from established short-haul markets



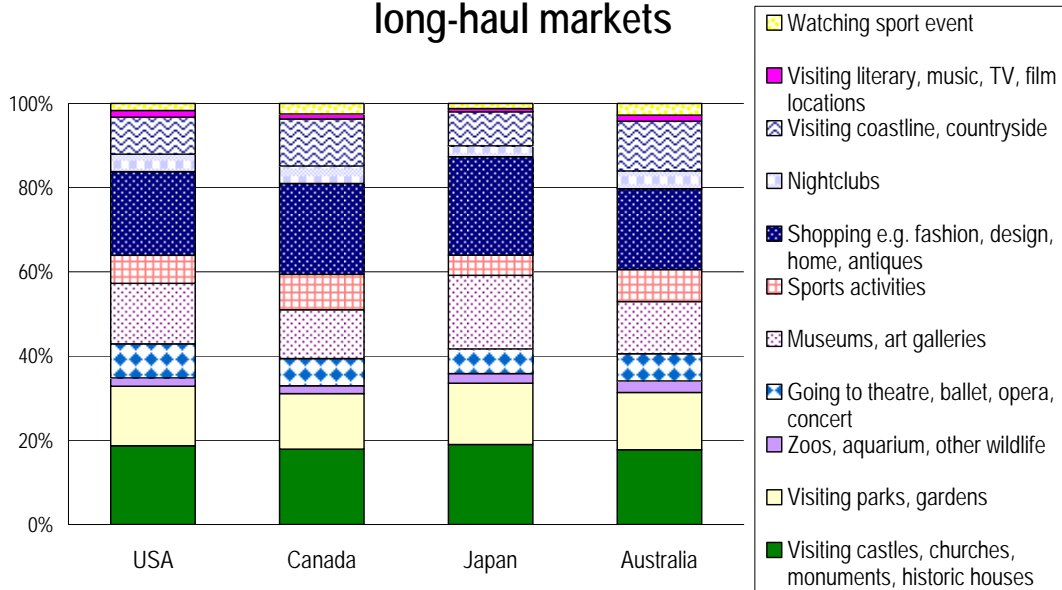
Activities undertaken by visitors from emerging short-haul markets



There are considerable similarities between the emerging short-haul markets shown, with perhaps one of the most striking points being the relatively low proportion of visitors from Hungary who shop compared with the situation for other markets.

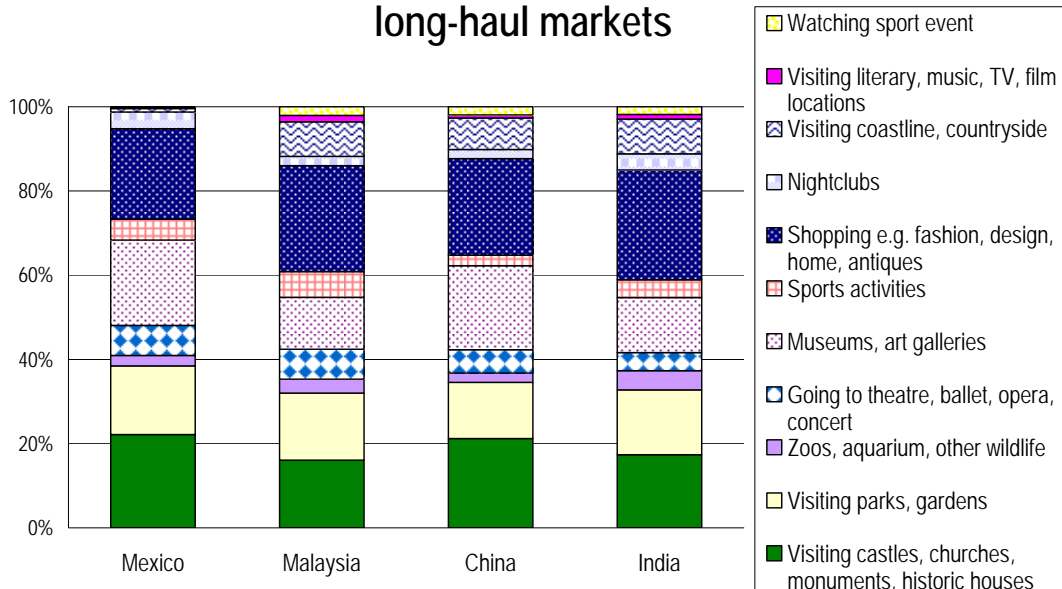
Again there is little difference in the activity mix among the established long-haul markets shown, with visitors from Australia displaying a greater likelihood to visit the coastline and countryside than visitors from Japan.

Activities undertaken by visitors from established long-haul markets



Finally the situation for emerging long-haul markets shows that visitors from Mexico and China are particularly likely to visit castles, churches, monuments and historic houses, whereas visitors from the Asian long-haul emerging markets are more likely to visit the coastline and countryside than are visitors from Mexico.

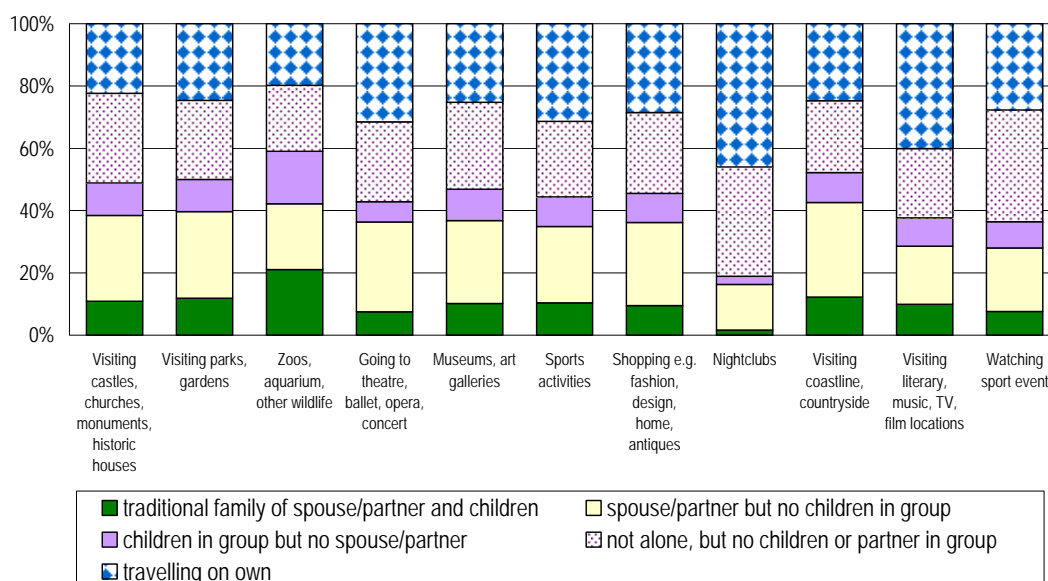
Activities undertaken by visitors from emerging long-haul markets



Combining travel group and activity information

Clearly one of the major areas of analysis over the coming months will be to look at the information about travel group and activities undertaken in combination with one another, thereby helping to segment the inbound travel market. The following chart provides a taster for what we might learn from this analysis, showing the travel group mix for those undertaking each type of activity.

Proportion undertaking activity in each travel group



A couple of the nuggets that we can take from this chart include that those visiting zoos, aquariums or other wildlife attractions are more likely to be a traditional family of spouse/partner and children than are those undertaking other activities and those visiting nightclubs are predominantly travelling either on their own or solely with other adults who are not their spouse/partner.

Travel group composition and 'activity mix'

The following grids help us understand the composition of travel groups and the 'mix' of activities that each visitor undertakes. Interpretation of the grids is very straightforward. As can be seen the 'diagonal' is indexed to 100, with remaining numbers in the grid telling us for each one hundred visitors in this particular category how many had other types of travelling companion, or undertook other types of activities.

This is perhaps best explained by way of a few examples. Starting with the 'Travel Group Composition' table we see that for each 100 visitors who are 'Travelling on own' there were no other categories of companion (as one would expect). For each 100 travelling with 'Spouse/Partner' 9 had child(ren) aged 0-4 in the group, 14 had child(ren) aged 5-11 in the group and so on.

Travel group composition	Travelling on own	Spouse/Partner	Child(ren) aged 0-4	Child(ren) aged 5-11	Child(ren) aged 12-17	Adult Friend(s)	Adult family member(s)	Business colleague(s)	Part of a Tour Group
Travelling on own	100	-	-	-	-	-	-	-	-
Spouse/Partner	-	100	9	14	10	3	6	0	1
Child(ren) aged 0-4	-	-	100	36	6	3	18	0	-
Child(ren) aged 5-11	-	-	-	100	26	3	22	0	2
Child(ren) aged 12-17	-	-	-	-	100	4	22	1	15
Adult Friend(s)	-	-	-	-	-	100	4	0	2
Adult family member(s)	-	-	-	-	-	-	100	0	1
Business colleague(s)	-	-	-	-	-	-	-	100	1
Part of a Tour Group	-	-	-	-	-	-	-	-	100

For the 'Activity Mix' we see that for each 100 visitors who visit castles, churches, monuments or historic houses, 59 also visit parks and gardens, whereas only ten visit zoos or aquariums. These tables can therefore be used to investigate the likelihood (or not) of different types of activity or travelling companion categories being combined during a trip.

Mix of activities undertaken during visit	Visiting castles, churches, monuments, historic houses	Visiting parks, gardens	Zoos, aquarium, other wildlife	Going to theatre, ballet, opera, concert	Museums, art galleries	Sports activities	Shopping e.g. fashion, design, home, antiques	Nightclubs	Visiting coastline, countryside	Visiting literary, music, TV, film locations	Watching sport event
Visiting castles, churches, monuments, historic houses	100	59	10	21	56	22	73	13	33	5	6
Visiting parks, gardens		100	11	23	57	25	77	15	33	6	7
Zoos, aquarium, other wildlife			100	23	59	30	76	14	40	9	11
Going to theatre, ballet, opera, concert				100	55	22	76	18	26	7	8
Museums, art galleries					100	20	75	14	29	7	6
Sports activities						100	67	18	45	8	14
Shopping e.g. fashion, design, home, antiques							100	15	24	5	7
Nightclubs								100	20	8	14
Visiting coastline, countryside									100	7	9
Visiting literary, music, TV, film locations										100	15
Watching sport event											100

Future plans

Admittedly this edition of Foresight is likely to have raised as many questions in the reader's mind as it has answered – for example ‘what do visitors who are accompanied by business colleagues do?’, ‘what is the profile of visitors who go to parks and gardens’ and so on. To address some of these questions VisitBritain will be exploring the new information about travelling companions and activities undertaken in much more detail over the coming months.

VisitBritain's ‘Market and Trade Profiles’ for 2008 (available early in the New Year) will include headline results for each of the three-dozen markets covered by this publication series. In addition, over the next few months VisitBritain intends to produce a short report profiling the type of visitor who undertakes each of the activities for which we now have information. Similarly, we will be producing reports covering each type of travelling group. These reports will all be available from www.visitbritain.com/research.

In the current wave of the survey VisitBritain is again sponsoring the ‘travelling group’ question, and as mentioned earlier asking about a different set of activities, including visits to spas or beauty centres and playing golf. A further new question that VisitBritain has sponsored in 2007 asks visitors whether during their current trip away from their home country they have, or will, spend at least one night in a country other than the UK. Clearly it will be next autumn before we are able to analyse the results from the 2007 survey, but these will no doubt be equally as revealing as those from 2006 discussed here.

Download earlier editions of FORESIGHT: www.visitbritain.com/research

Issue	Date	Market Focus	Issue of the Month
Issue 1	November 2003	USA, Canada and Mexico	Implications of an ageing population in Britain
Issue 2	December 2003	France, Italy, Portugal and Spain	Airport capacity in Britain
Issue 3	January 2004	Poland, Russia, China and South Korea	Visits to Britain by British Nationals living overseas
Issue 4	February 2004	Britain	School holidays and their impact on seasonal spread
Issue 5	March 2004	Australia and New Zealand	West Nile Virus
Issue 6	April 2004	The EU Accession States	The Internet Part 1: Consumers
Issue 7	May 2004	South Africa, Nigeria, Kenya and Ghana	The Internet Part 2: Businesses
Issue 8	June 2004	India and Pakistan	Trends in Cross-Channel Travel Behaviour
Issue 9	July 2004	Belgium, Netherlands, Luxembourg and Ireland	Cost of visiting Britain compared with other destinations
Issue 10	August 2004	Japan, Hong Kong, Philippines and Taiwan	What might climate change mean for tourism in Britain
Issue 11	September 2004	Brazil, Argentina, Chile and Venezuela	London's Olympic Bid – implications for British Tourism
Issue 12	October 2004	Norway, Sweden, Denmark and Finland	Smoking in public places
Issue 13	November 2004	Britain	Outlook for inbound tourism to Britain in 2005
Issue 14	December 2004	UAE, Saudi Arabia, Kuwait and Iran	Inbound tourism and the value of Sterling
Issue 15	January 2005	Germany, Austria and Switzerland	Britain's ethnic diversity
Issue 16	February 2005	Malaysia, Thailand and Singapore	Britain's transport infrastructure
Issue 17	March 2005	Greece, Romania, Bulgaria and Croatia	Foreign Direct Investment & inbound business tourism
Issue 18	April 2005	Israel, Egypt and Turkey	Inbound study visits
Issue 19	May 2005	Poland, Czech Republic and Hungary	Low-cost Airlines
Issue 20	June 2005	USA, Canada and Mexico	Weddings, Stag Weekends and Hen Weekends
Issue 21	July 2005	France, Italy, Spain and Portugal	The Day Visit Market
Issue 22	August 2005	Latvia, Lithuania, Estonia, Ukraine and Belarus	Quality
Issue 23	September 2005	Russia and China	Daylight Saving
Issue 24	October 2005	Australia, New Zealand and South Africa	Outlook for Inbound Tourism in 2006
Issue 25	November 2005	India, Sri Lanka and Bangladesh	Twenty-five years of Inbound Tourism
Issue 26	December 2005		Tourism Satellite Accounts
Issue 27	January 2006	Benelux and Ireland	Tourism and the Disability Discrimination Act
Issue 28	February 2006	Japan, South Korea and Hong Kong	Tourism and the National Lottery
Issue 29	March 2006	Brazil, Argentina and the Caribbean	Next generation aircraft
Issue 30	April 2006	Nordic region and Iceland	The cruise line boom
Issue 31	May 2006	Central Europe	The power of football
Issue 32	June 2006	UAE, Kuwait, Bahrain and Oman	Wind Farms and the Visitor Economy
Issue 33	July 2006	North Africa, Malta and Cyprus	Inbound tourism - the global context
Issue 34	August 2006		International tourism balance of payments deficit
Issue 35	September 2006	Singapore, Malaysia and Thailand	Inbound visitor decision lead times
Issue 36	October 2006	Greece, Turkey, Bulgaria and Romania	Seasonality
Issue 37	November 2006	Inbound visits by the over 55's	Outlook for Inbound Tourism in 2007
Issue 38	December 2006		USA and Canada
Issue 39	January 2007		Ferry passenger visitors
Issue 40	February 2007		What will shape tourism in the next decade?
Issue 41	March 2007		The value of tourism in the UK
Issue 42	April 2007		India and Japan
Issue 43	May 2007		Inbound holiday visitors
Issue 44	June 2007		The changing face of overnight domestic tourism
Issue 45	July 2007		Inbound visitors using the Channel Tunnel
Issue 46	August 2007		Inbound visitors aged 16-24
Issue 47	September 2007		The impact of the Channel Tunnel Rail Link
			Climate change and what it might mean for UK tourism

¹ Data from International Passenger Survey has been made available by the Office for National Statistics and has been used by permission. The ONS do not bear any responsibility for the analysis or interpretation of the data reported here. Crown Copyright 2007. Source: ONS

Britain on View is the UK's specialist photographic library offering unique images of Britain and British life. Whether you work in tourism, publishing or design you'll find what you're looking for amongst our range of 40,000 high quality images, visit www.britainonview.co.uk

