



FORESIGHT is a monthly commentary on significant issues within the tourism sector. Each month, "Market Focus" discusses economic, social and political factors that underlie demand for tourism now and in the future. In addition, a spotlight is focused on a significant tourism issue. This month 'Market Focus' profiles inbound visitors staying in Britain for between one and three nights and 'Issue of the Month' tackles one of Britain's most talked about subjects - the British weather.

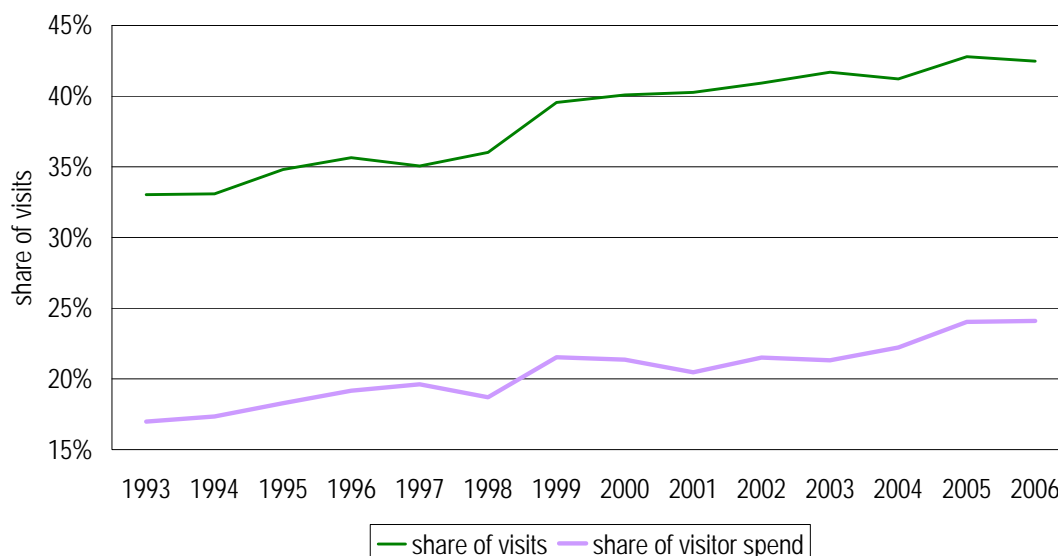
Market Focus – Inbound visitors staying 1-3 nights in Britain

According to figures from the International Passenger Survey¹ there were 13.9 million visits to Britain during 2006 from overseas that lasted for between one and three nights, representing 42% of all visits. These visits were worth £3.8bn, or 24% of all inbound visitor spending, so clearly a market worthy of our attention. With relatively short stays it is not surprising that the average spend per visit of £276 is lower than that for all visits (£486), but if we focus on spend per night then those in Britain for 1-3 nights generate £138 per night, considerably higher than the average nightly spend for all visits of £58.

Trends

Anecdotally it is common knowledge that in the past couple of decades 'short stay' visits have grown in importance and the data certainly gives credence to this common perception. It is clear from the following chart that since 1993 the proportion of inbound visits and inbound visitor spending that is accounted for by 1-3 night stays has increased markedly, indeed, £1 in every £4 spent in Britain by inbound visitors comes from 1-3 night stays nowadays, whereas in the early 1990s it was £1 in every £6.

The growing importance of 1-3 night trips



Top markets

Intuitively one would expect visitors from short-haul markets to be more likely than those from long-haul markets to spend just a short amount of time in Britain, but we must remember that many long-haul visitors are likely to combine visits to more than one European country on a single trip. There are different ways of defining what a 'top market' is in this context, for example based on the number of visits or amount of visitor spending, but it is equally insightful to explore which are the 'top' short-stay markets in relative terms. The following table highlights the top twenty markets for each of these three measures.

Visitors from Ireland top the 'volume' table, with 1.7 million 1-3 night visits in 2006, followed by France and Germany, each responsible for more than 1.6 million short-stay visits. In terms of spending the US is a clear leader with 1-3 night visitors contributing £656m to the visitor economy. When it comes to the share of visits from each market that last for 1-3 nights Ireland is again in the top three, but it is visitors from Luxembourg and Iceland who are most likely to be on a short-stay trip.

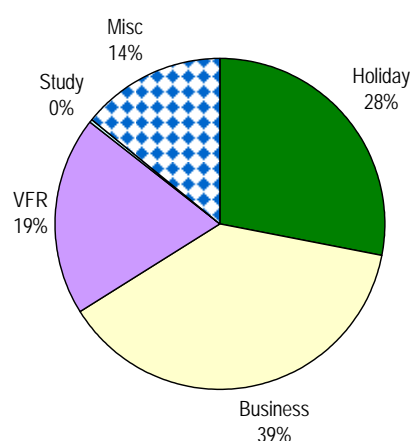
Visits (000s)		Spend (£m)		Proportion of visits	
Irish Republic	1,672	USA	656	Luxembourg	68%
France	1,653	Irish Republic	467	Iceland	58%
Germany	1,615	France	357	Irish Republic	57%
USA	1,396	Germany	336	Norway	56%
Netherlands	957	Netherlands	230	Netherlands	53%
Spain	810	Spain	188	Sweden	53%
Italy	624	Italy	160	Belgium	52%
Belgium	523	Switzerland	140	Switzerland	51%
Poland	505	Norway	132	Czech Republic	51%
Switzerland	382	Sweden	126	South Korea	50%
Sweden	377	Belgium	126	Portugal	49%
Norway	358	Denmark	75	Hungary	48%
Denmark	250	Canada	60	Denmark	47%
Canada	232	Australia	57	Germany	47%
Australia	232	Poland	50	France	45%
Czech Republic	165	Japan	42	Finland	43%
Hungary	134	Austria	34	Italy	42%
Portugal	119	South Africa	33	Argentina	41%
Japan	118	United Arab Emirates	26	Spain	41%
Austria	115	India	26	Mexico	39%

Purpose mix

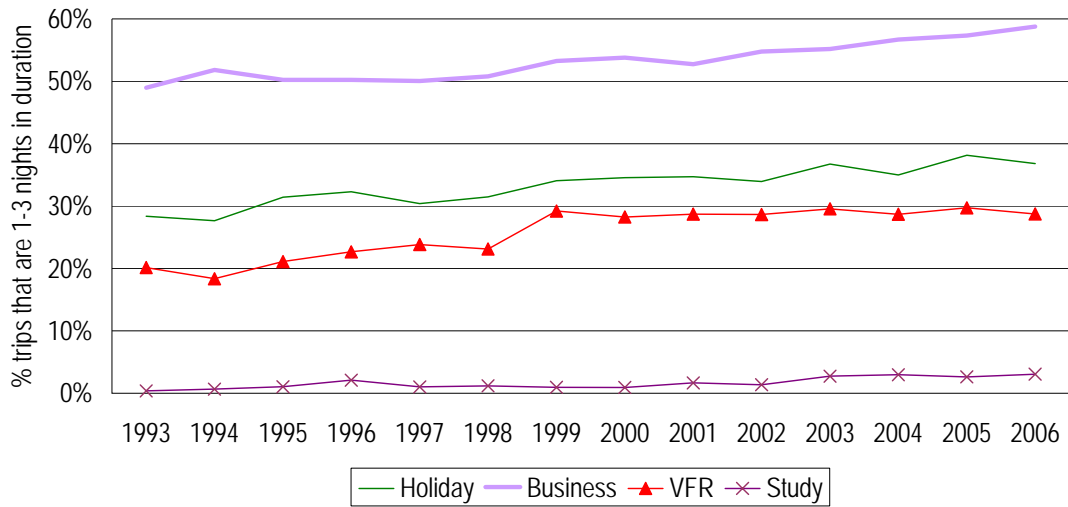
The pie chart indicates that in 2006 39% of 1-3 night visits to Britain were for business, making this the most common journey purpose for this market segment, but more than one-in-four short-stay trips is for a holiday.

The second chart reveals how the 'market share' of short-stay visits within each type of journey purpose has evolved over the past fourteen years. It is evident that the relative importance of 1-3 night trips has grown for each journey purpose, and that nearly 60% of business trips are short-stay, compared to just 30% of 'VFR' trips.

Journey Purpose of 1-3 night visits



Relative importance of 1-3 night trips within each type of journey purpose



Demographics

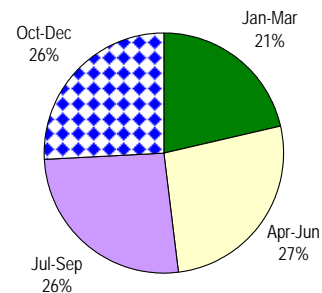
So who visits Britain from overseas for between one and three nights? The table highlights that one-in-five of visits of this duration is by a male aged 35-44, whereas only a tiny fraction of such trips are by those aged 65+ or under 15's.

	Male	Female
0-15	2%	2%
16-24	5%	5%
25-34	15%	10%
35-44	19%	8%
45-54	14%	6%
55-64	7%	4%
65+	2%	1%

Time of year

As can be seen from the pie chart, short-stay visits to Britain are popular throughout the year, with more than one-in-four 1-3 night visits taking place in the period October to December. This reinforces the message that focussing on this market segment can be very helpful in generating 'seasonal spread' of inbound visits, as 47% of short-stay trips take place between October and March, whereas only 38% of longer visits take place during these six months.

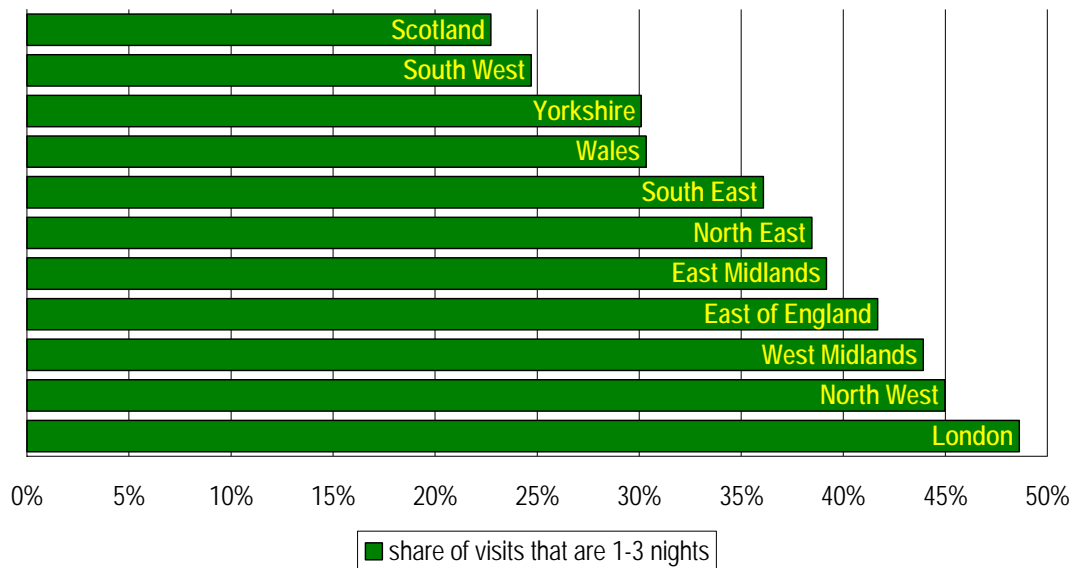
Seasonal Spread



Regional differences

Cities are key destinations for short-stay visits, so it is no surprise that nearly half of all visits to London are for between one and three nights. The North West (including Manchester and Liverpool) and West Midlands (Birmingham) also rely heavily on 1-3 night visits, but at the other end of the spectrum less than one-in-four visits to Scotland and South West England are short-stay trips.

Proportion of visits that are 1-3 nights in duration



Travel group and activities during stay

Delving into the questions that VisitBritain sponsored on the International Passenger Survey in 2006 enables us to discover that 42% of inbound visitors who stayed for between one and three nights were travelling alone (slightly higher than the 37% of visitors who stayed for more than three nights) and 11% were travelling with business colleagues (compared with just 4% of visitors staying four or more nights).

Short-stay visitors were less likely than those staying for longer to do each of the activities asked about in 2006, but still nearly one-in-five short-stay visitors went to a castle, church, monument or historic house, and one-in-seven visited museums or art galleries.

A trend that is set to continue?

We have seen that short-stay visits have gradually become more important relative to long-stay visits over the past couple of decades regardless of trip purpose; however, there are reasons for speculating that this trend may not persist in the years to come. A possibility exists that international tourists may respond to the sustainability debate by taking fewer trips during the course of a year, but making the trips that they do take last longer in order to get a deeper understanding of the destination that they are visiting. There is no way of telling how likely it is that this possibility will turn into a reality, so for the meantime there can be little doubt that short-stay visits will continue to be of fundamental importance to Britain's inbound visitor economy.

Issue of the Month – The British Weather

'Lets go to the beach!', 'Conditions look great for paragliding' or 'That teashop looks dry and warm' – there can be little doubt that the weather plays an enormously important role in determining where people go on a tourism trip, what they do once they get there and the types of businesses whose cash desks see the brisk business. This month we investigate the nature of British weather, the extent to which overseas residents think it is either rainy or foggy (and whether or not this perception deters them from visiting Britain) and the role that weather forecasts play in influencing the day-to-day choices made by consumers that impact on the performance of tourism businesses.

Separating fact from fiction

Britain has a northerly latitude meaning that in the summer days are long, but in the winter days are short. Being surrounded by the Atlantic Ocean to the west and North Sea to the east Britain is subject to a maritime climate. In essence this means that extremes are rare in Britain, but precipitation and cloud cover are common, particularly so as one heads further north and west. Fog is a further characteristic that is closely associated with a maritime climate.

So how does British weather compare to that in other parts of the world? Although open to the allegation of 'lies, damned lies and statistics' it is possible to point to, what for some, may be unexpected results when we compare typical annual averages recorded in Britain with those from other destinations across the globe.

Taken from annual averages compiled by www.bbc.co.uk/weather we can glean several fascinating nuggets, including:

- The average number of days on which rain falls in London each year is less than in Paris, Santander (Spain) and Wellington (New Zealand)
- Were all the dry days that London experiences during a year put back-to-back there would be no rain from 1st January until 1st August
- London is drier than Rome, New York, Brisbane, Rio de Janeiro, and Tokyo
- The average minimum daily temperature experienced in London is higher than that in Seattle, Dublin and Toronto

	Average Sunlight (hours per day)	Average Min Temp	Average Max Temp	Average Precipitation (mm per annum)	Wet Days (+0.25mm)
London	4.0	7.3	13.8	593	153
Rome	6.8	11.8	20.5	744	77
Paris	5.0	7.6	15.6	619	162
New York	7.3	7.4	15.8	1,086	125
Brisbane	7.6	15.4	25.5	1,136	126
Hong Kong	5.5	20.3	24.7	2,169	110
Santander	4.8	11.2	16.8	1,189	169
Tokyo	5.7	9.8	18.7	1,565	107
Seattle	5.7	7.2	14.8	849	150
Wellington	5.5	9.6	16.3	1,205	165
Rio de Janeiro	6.2	20.0	26.1	1,086	128
Toronto	5.5	2.8	11.9	818	145
Dublin	3.8	5.8	13.3	762	139

Variability

The adage of 'two fine days then a thunderstorm' hints at the characteristic of British weather to be variable from one day to the next, but there is of course great variation within Britain on the same day, with, for example, the Hebrides basking under a clear blue sky while Kent sees grey skies and persistent rain.

As mentioned earlier, ‘averages’ are an imperfect tool for comparing the weather experienced in one locality with that of another, but we can at least use the statistics (again based on data compiled by www.bbc.co.uk/weather) to get a flavour for just how diverse Britain’s weather is during a typical year. We can see that Plymouth enjoys, on average, 50 minutes more sunlight per day than York and that Oban has twice the amount of rainfall than Edinburgh.

	Average Sunlight (hours per day)	Average Min Temp	Average Max Temp	Average Precipitation (mm per annum)	Wet Days (+0.25mm)
London	4.0	7.3	13.8	593	153
Edinburgh	3.8	5.6	11.8	676	191
Oban	3.3	5.9	11.7	1,451	222
Cardiff	4.3	6.9	13.6	1,065	180
Plymouth	4.5	8.1	13.5	950	178
York	3.7	6.0	13.5	639	177

Britain certainly gets periodic bouts of severe weather, but in general ‘extremes’ are very rare. This can act in our favour when it comes to attracting inbound visitors, for example a visitor from the United Arab Emirates may well decide that a trip to Britain in August is a fine idea, as it will enable them to escape from typical daily highs of 48 °C, and equally a resident of Edmonton in Canada would find Britain’s January temperatures positively balmy in comparison to the average daily **high** of -9 °C back in their home city.

Perceptions

What do overseas residents think the weather is like in Britain? To answer this question we can take a look at the Anholt-GMI Nations Brand Index - an on-line survey of between 200 and 1,000 consumers in some three-dozen countries worldwide, as this survey is an ideal tool for investigating perceptions about Britain.

VisitBritain sponsored questions that were included in the survey in May 2006 covered perceptions of British weather. Respondents were asked to consider two statements, scoring each on a scale of 1 to 7, where 1 = strongly disagree and 7 = strongly agree. The first statement was:

“Britain is always wet and foggy”.

The average score for this statement was 4.48, suggesting that respondents tended to agree (although not strongly) with this statement.

However, potentially unpredictable weather is certainly not perceived as a barrier to visiting Britain. We know this to be so courtesy of responses to the second statement that respondents were asked to consider, namely:

“I would not want to visit Britain because of the weather there”.

The average score for this question was just 2.76, indicative of strong disagreement with the statement. The message here is that although we need to do more to convince potential visitors that British weather is far better than they might imagine, we are not actually foregoing significant inbound visitor spending due to the misconceived belief that wherever you go in Britain you will need to take an umbrella.

Improving forecast accuracy?

Britain is not the Arabian peninsular where there is near 100% certainty that everywhere will be sunny and hot day after day. We have a temperate climate that is typified by changeable weather patterns. Being an island with significant areas of upland our weather conditions are particularly susceptible to local variability due to the influence of the sea, altitude, whether you happen to be somewhere that is on the lee of mountain and so on.

This all means that British weather varies from one day to the next, from one location to another and even from hour-to-hour. The weather regularly takes on a 'showery regime', which by its very nature means that while one location has an afternoon of bright dry conditions, somewhere twenty miles drive away experiences frequent downpours.

The Met Office is charged with the task of forecasting British weather and disseminating this information to the public, media and businesses. The Met Office has a series of corporate targets that relate to its forecast accuracy and on which it reports regularly. These 'Key Performance Targets' are set by Government and include:

- next-day rainfall forecasts for 11 places within the UK;
- next-day temperature forecasts (max and min) for 11 places within the UK;
- the forecasting skill of Met Office computer models.

The following table summarises how the Met Office performed against these targets during 2006/7:

Measure	Target for 2006/7	Value at March 2007	Achieved/not achieved
11 cities maximum temperature	83.5%	84.6%	Achieved
11 cities minimum temperature	79.0%	81.8%	Achieved
11 cities probability of precipitation	0.345	0.349	Achieved
Numerical Weather Prediction Index	118.5	118.5	Achieved

Looking at the trends in Met Office forecasting accuracy there is clear statistical evidence that forecast accuracy, though not perfect, has improved over recent years as investment in 'super computers' following the 1987 'hurricane' debacle begins to pay dividends. It is likely that the flack that the Met Office experienced following the 1987 storm helps to explain why forecasters may now be more 'risk averse'. If there is a small chance of severe weather it is perhaps better to warn people even if the chance of disruption is relatively low, than to not warn them and be caught out by damaging weather conditions.

Not only is forecasting the weather in a climate such as Britain's a challenge in its own right, but being able to convey meaningful information regarding the forecast through media channels that place strict limitations on the number of seconds a bulletin may last, brings further complications. Given that the weather across Britain can vary greatly between places and from hour to hour, local, rather than national, media has perhaps a better chance of delivering relevant information to tourists.

Certainly local weather forecasting is an area being developed by the Met Office, and technology may enable better transmission of this information to consumers. The Internet

allows access to forecasts at a very detailed level, that can be kept up-to-date throughout the day and night, but relatively small numbers of tourists will log on to a website before deciding what they are going to do on a particular day. Mobile phone technology may offer a solution here, with a growing proportion of consumers owning phones capable of accessing web-based information and improvements in GPS technology it is surely only a matter of time before tourists will be able to receive a 'forecast for the next four hours' specific to their current locality without having to enter their current post code or grid reference.

'Summer' 2007

Summer 2007 was anything but 'normal', with exceptionally above average rainfalls recorded in many parts of Britain in May, June and July due to the Atlantic jet-stream having a more southerly track than is usual (this did mean that the weather in Western Scotland was drier than normal). England experienced 180% of the 'average' rainfall (based on the period 1961-90) expected in May, 241% of average expected rainfall in June and 219% of average expected rainfall in July.

We can scrutinise data from VisitBritain's England Attractions Monitor to investigate the contention that visitors adapt their plans according to the actual (or forecast) weather conditions. This is a quarterly survey of around six hundred attractions across England with the table highlighting the very different experiences witnessed over recent months depending on where an attraction is located, the type of attraction and the prevailing weather conditions at the time.

Where	Attraction Type	When	Weather summary	Annual Change (%)
England	Gardens	July	Wet	-6%
England	Gardens	August	Dry and sunny	9%
England	Museums and Galleries	July	Wet	7%
England	Museums and Galleries	August	Dry and sunny	-4%
Yorkshire and The Humber	All	April	Dry and warm	15%
Yorkshire and The Humber	All	June	Wet, floods in S Yorks	-10%

Examining United Kingdom Tourism Survey figures for overnight trips to England (where the rainfall was at its heaviest) by UK residents during the three month period May to July we find that 2% more trips were made than during the same three months of 2006. Visitor spending on overnight trips to England by UK residents was unchanged in nominal terms (representing an 'inflation adjusted' decline of 2%). These figures suggest that the unfavourable weather did not have too large an impact on the willingness of Britons to spend a night away from home in England.

Looking back in time, August 2004 brought exceptionally heavy rainfall, and although we cannot make reliable year-on-year comparisons using UKTS figures, we do have data from the VisitBritain 'Short Term Trip Tracker', and this indicates that despite the wet weather at the peak of the school summer holidays domestic overnight trips remained at very similar levels to that seen during the heat wave of August 2003.

It is worth remembering that in some circumstances 'one man's loss is another man's gain' in relation to the wet weather experienced in the period May to July 2007, a message that was in essence visible in the data quoted earlier from the England Attractions Monitor. Seaside resorts may have deserted beaches when summer weather is inclement, but indoor attractions,

of which the UK has an increasing number, prove very popular. Thus, rainy weather may well lead to displacement of trips, but will not necessarily result in a downturn in overall trip taking. Perhaps slightly perversely such displacement could boost overall tourism spending, as rather than sunbathing on the beach with the only purchases being for an ice cream, a family might go to a paid indoor attraction or museum.

The overall impact of the wet weather in the early part of summer 2007 may well have been limited, but clearly areas and businesses that were inundated by the resultant flooding suffered considerable hardship and dislocation at the height of what should have been one of the busiest times of the year. Recognising this, and the broader impact of a series of external factors, VisitBritain has been working with a number of partners to help bolster the domestic visitor economy through a series of high-profile marketing campaigns.

Weather impacts

The weather can impact on tourism in a variety of ways; by motivating a trip, acting as a deterrent, or simply making a trip impossible. Falling into this latter category are not just 'violent' weather events such as thunderstorms or gale force winds, but more benign weather such as fog, which caused considerable disruption to traffic at London's Heathrow Airport during the week before Christmas in 2006.

It is the more dramatic weather events that receive greater attention, for example the deluge that inundated Boscastle in August 2004 and floods around Tewksbury in July 2007. As we have discovered in earlier editions of Foresight covering climate change, such 'freak weather' looks set to become more common in the years ahead, with this being a particular concern for businesses located on floodplains or in close proximity to coastline vulnerable to rising sea levels or storm surges.

Forecast for 2008 –  or  ?

Even if asked after a month-long drought, there is little doubt that when asked to conjure up an image that typifies British weather most people will mention the mud at Glastonbury rather than a field of corn swaying gently in the heat of the midday sun, but as we have seen, the weather in Britain is not discouraging overseas residents to visit, and in most cases domestic tourists are able to adjust their day-to-day plans to take account of the prevailing weather. So, will 2008 bring a summer akin to the heat wave of 2003 or a repeat of the downpours experienced in parts of the country during 2007?

The Met Office issues 'seasonal forecasts', but not yet an outlook stretching more than three months into the future. The remaining winter months of January and February will, according to the latest forecast, bring temperatures that are more likely to be above normal than either near or below normal, with rainfall slightly more likely to be near, or above average, than below average. Tourism businesses will be taking a keen interest in the prevailing weather during the early weeks of spring (meteorologically speaking winter officially ends on 29th February) as Easter falls early in 2008, Easter Sunday being March 23rd, meaning that the first major public holiday of the year occurs a week before the clocks go forward by one hour, marking the onset of 'British Summer Time'.

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Issue 2	December 2003	USA, Canada and Mexico	Implications of an ageing population in Britain
Issue 3	January 2004	France, Italy, Portugal and Spain	Airport capacity in Britain
Issue 4	February 2004	Poland, Russia, China and South Korea	Visits to Britain by British Nationals living overseas
Issue 5	March 2004	Britain	School holidays and their impact on seasonal spread
Issue 6	April 2004	Australia and New Zealand	West Nile Virus
Issue 7	May 2004		
Issue 8	June 2004	The EU Accession States	The Internet Part 1: Consumers
Issue 9	July 2004	South Africa, Nigeria, Kenya and Ghana	The Internet Part 2: Businesses
Issue 10	August 2004	India and Pakistan	Trends in Cross-Channel Travel Behaviour
Issue 11	September 2004	Belgium, Netherlands, Luxembourg and Ireland	Cost of visiting Britain compared with other destinations
Issue 12	October 2004	Japan, Hong Kong, Philippines and Taiwan	What might climate change mean for tourism in Britain
Issue 13	November 2004	Brazil, Argentina, Chile and Venezuela	London's Olympic Bid – implications for British Tourism
Issue 14	December 2004	Norway, Sweden, Denmark and Finland	Smoking in public places
Issue 15	January 2005	Britain	Outlook for inbound tourism to Britain in 2005
Issue 16	February 2005	UAE, Saudi Arabia, Kuwait and Iran	Inbound tourism and the value of Sterling
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Issue 18	April 2005	Malaysia, Thailand and Singapore	Britain's transport infrastructure
Issue 19	May 2005	Greece, Romania, Bulgaria and Croatia	Foreign Direct Investment & inbound business tourism
Issue 20	June 2005	Israel, Egypt and Turkey	Inbound study visits
Issue 21	July 2005	Poland, Czech Republic and Hungary	Low-cost Airlines
Issue 22	August 2005	USA, Canada and Mexico	Weddings, Stag Weekends and Hen Weekends
Issue 23	September 2005	France, Italy, Spain and Portugal	The Day Visit Market
Issue 24	October 2005	Latvia, Lithuania, Estonia, Ukraine and Belarus	Quality
Issue 25	November 2005	Russia and China	Daylight Saving
Issue 26	December 2005	Australia, New Zealand and South Africa	Outlook for Inbound Tourism in 2006
Issue 27	January 2006	India, Sri Lanka and Bangladesh	
Issue 28	February 2006		Twenty-five years of Inbound Tourism
Issue 29	March 2006	Benelux and Ireland	Tourism Satellite Accounts
Issue 30	April 2006	Japan, South Korea and Hong Kong	Tourism and the Disability Discrimination Act
Issue 31	May 2006	Brazil, Argentina and the Caribbean	Tourism and the National Lottery
Issue 32	June 2006	Nordic region and Iceland	Next generation aircraft
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Issue 34	August 2006	UAE, Kuwait, Bahrain and Oman	The power of football
Issue 35	September 2006	North Africa, Malta and Cyprus	Wind Farms and the Visitor Economy
Issue 36	October 2006		Inbound tourism - the global context
Issue 37	November 2006	Singapore, Malaysia and Thailand	International tourism balance of payments deficit
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Issue 47	September 2007		The changing face of overnight domestic tourism
Issue 48	October 2007	Inbound visitors using the Channel Tunnel	The impact of the Channel Tunnel Rail Link
Issue 49	November 2007	Inbound visitors aged 16-24	Climate change and what it might mean for UK tourism
Issue 50	December 2007		Special edition: Inbound visitors' travel group composition and 'activity mix
		Poland, Czech Republic and Hungary	The Credit Crunch
			Outlook for Inbound Tourism in 2008

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