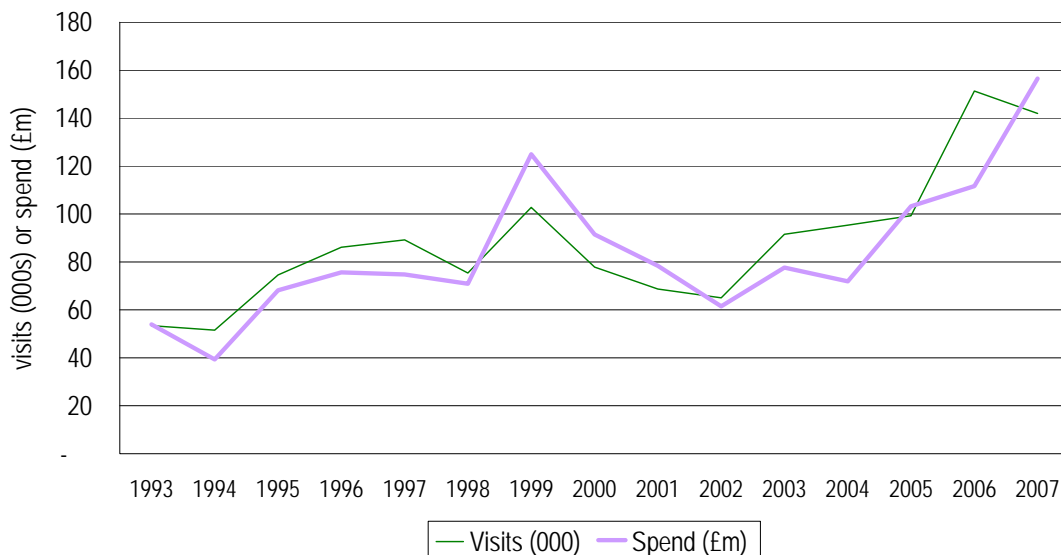


FORESIGHT is a monthly commentary on significant issues within the tourism sector. Each month, 'Market Focus' discusses economic, social and political factors that underlie demand for tourism now and in the future. In addition, a spotlight is focused on a significant tourism issue. This month 'Market Focus' is devoted to Turkey which up until now has been seen primarily as a destination rather than origin market for international tourism, while 'Issue of the Month' investigates findings from the latest Nations Brand Index Survey relating to the sources of information people use before, during and after a holiday, and how far they feel able to rely on each source.

### Market Focus – Turkey

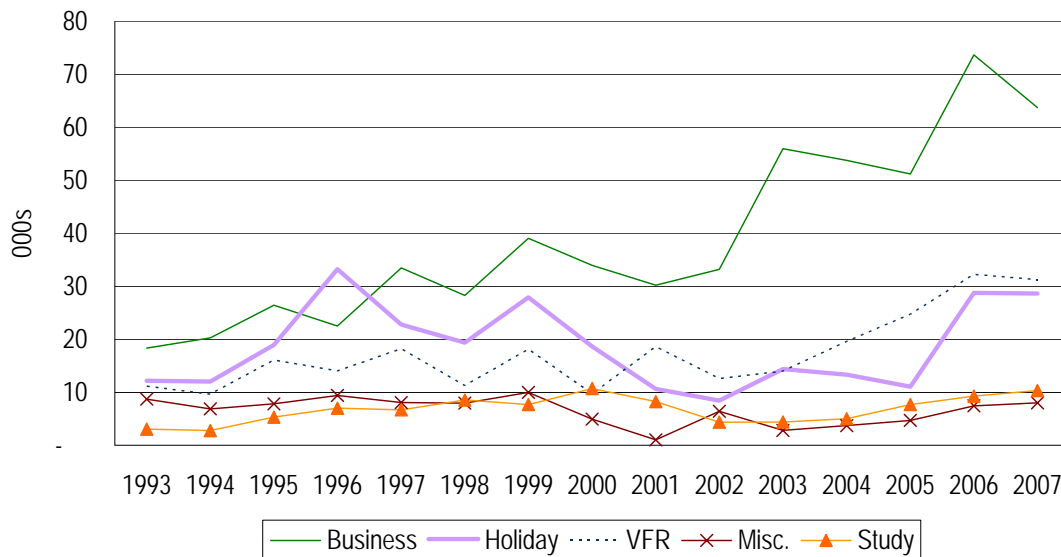
How important is Turkey as an inbound market for the UK visitor economy? Looking at International Passenger Survey figures for 2007<sup>1</sup> we find that it is 36<sup>th</sup> in the league table for visits and ranked 28<sup>th</sup> in terms of visitor spending. The following chart reveals that after a dip in 2001 and 2002 both volume and value has been on a broadly upward trend, with 142,000 visits worth an estimated £156m in 2007.

**Inbound visits and spend from Turkey**



It becomes evident from the chart on the following page that growth in visits to Britain from Turkey over the past few years has been driven primarily by growth in business tourism, and to a lesser extent by growth in the number of visits to friends and relatives. The number of visits from Turkey to Britain for a holiday has not grown over the past decade, and accounts for only one-in-five visits.

## Inbound visits from Turkey by journey purpose



### Access

One of the main barriers in developing leisure traffic from Turkey to Britain relates to 'access' in that visitors wishing to holiday in Britain who are Turkish require a visa and this is likely to be why holiday visits have not grown at anything like the pace of business visits in the past decade. A visa to visit the UK costs £65 and each applicant needs to provide 'biometric data' in the form a 10-digit fingerscan and digital photograph. The dual hurdles of cost and logistics of applying may be acting to depress potential demand.

A further consideration relating to how easy it is to get from Turkey to Britain is the availability of air routes. At present the key 'business' routes are from Ankara and Istanbul, but bmi recently announced that it plans to axe its Ankara to Heathrow flights. There are many flights between Turkey and the regions of Britain, but these are geared very firmly at taking Brits to 'sun and beach' destination in Turkey, rather than enabling those living in Turkey to visit the regions and nations of Britain.

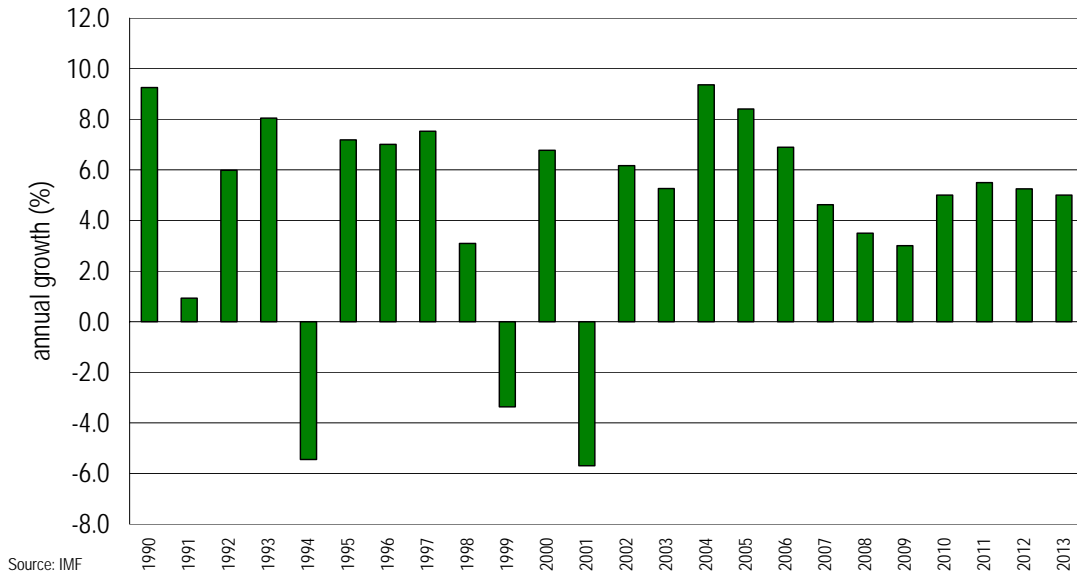
### Economics

When measured in terms of 'purchasing power parity' (that's a method of adjusting for the fact that the cost of living varies form one country to another), Turkey's per capita GDP has increased from a little of \$5,500 back in 1990 to an estimated \$13,000 in 2007, with the latest IMF forecasts indicating that growth is set to continue, with average per capita GDP of \$17,500 by 2013. So growth rates are impressive, but it is important to recognise that per capita income in Turkey is still well below the average for most current member states of the European Union with the exception of Bulgaria and Romania.

Although GDP per capita might be below that found among most European nations when we consider the absolute size of the Turkish economy we find that it accounts for 1.37% of the global economy (again measured in terms of purchasing power parity). This makes Turkey's economy one and a half times as large again as that of Poland, by far the most important of the twelve countries to have joined the European Union since 2004.

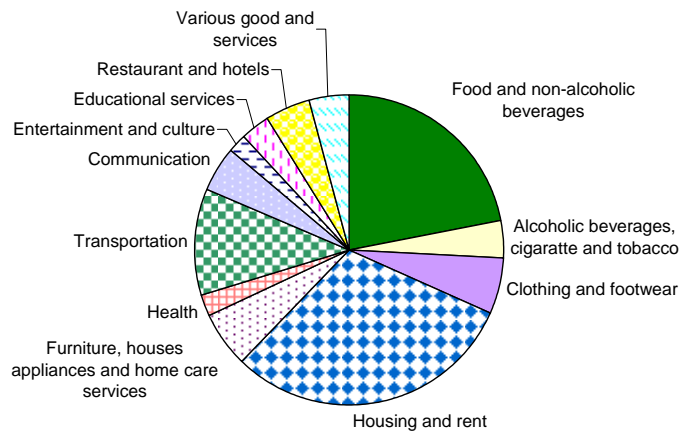
The following chart shows that after a shaky period around the turn of the century GDP in Turkey has been growing at an annual rate in excess of 4% throughout the past five years, and after a slowing of growth (in line with global economic trends) during 2008 and 2009 the International Monetary Fund forecast growth in the region of 5% per annum through to 2013.

### Gross Domestic Product in Turkey - trends and forecasts



It is helpful to look at figures relating to how those living in urban settlements in Turkey (the most likely to engage in foreign travel) spend their income. The chart sets out the distribution of household consumption by type of expenditure (based on figures compiled by TurkStat) and reveals that currently 5% of household spending is destined for 'restaurants and hotels' and 2% on 'entertainment and culture'.

### Consumer expenditure - urban households



Tied in with expenditure on communications it is worth noting that, according to World Internet Statistics, 21% of the Turkish population has Internet access, with roughly a quarter of this total using a broadband connection.

The Turkish Lira has a long tradition of volatility, but with increased economic discipline fluctuations had become less dramatic in recent times. The chart shows how the cost of Sterling has changed for visitors from Turkey over the past three years - we can see that 2006 was a year of steep increases in the cost of Sterling whereas since the early months of 2007 Britain had become far more affordable; in September 2008 Sterling cost 12% less in terms of Turkish Lira than a year earlier. However, the Lira has fallen in value dramatically since early October, from Tkl2.30 to Tkl2.70, increasing the cost of Sterling by 17% in a matter of weeks.

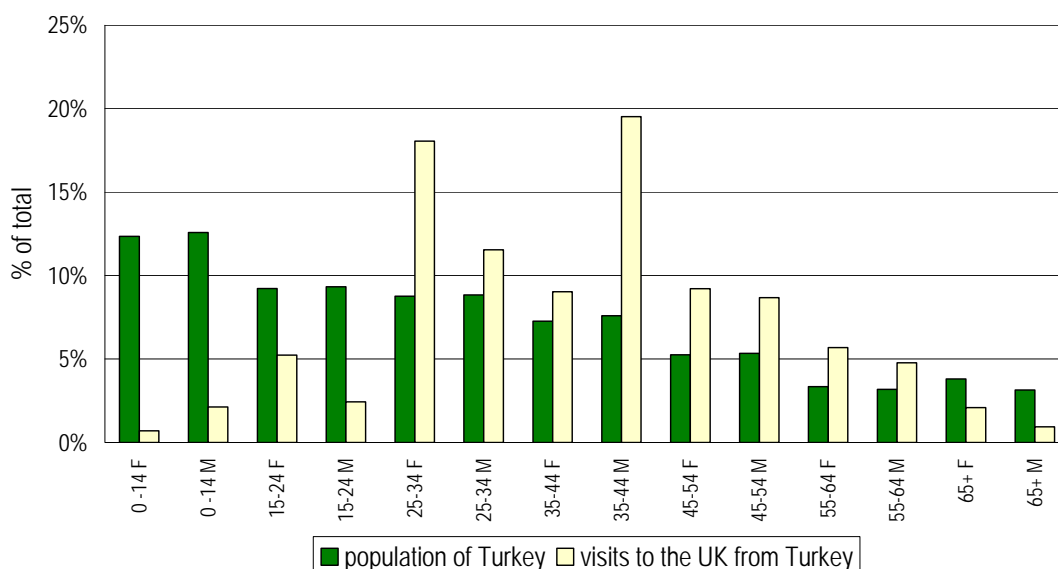
## Turkish Lira against Sterling



## Demographics

It is estimated that there are around four million Turkish born residents living in European Union member states, with Germany having the largest share. In Britain the Institute of Public Policy Research reckon that around 70,000 UK residents were born in Turkey. One of the starkest demographic contrasts between Turkey and much of Europe is the youthfulness of its population (estimated to be 71 million). The following chart shows the age and sex distribution of the resident population of Turkey alongside that for visitors to the UK from Turkey.

## Age and sex distribution



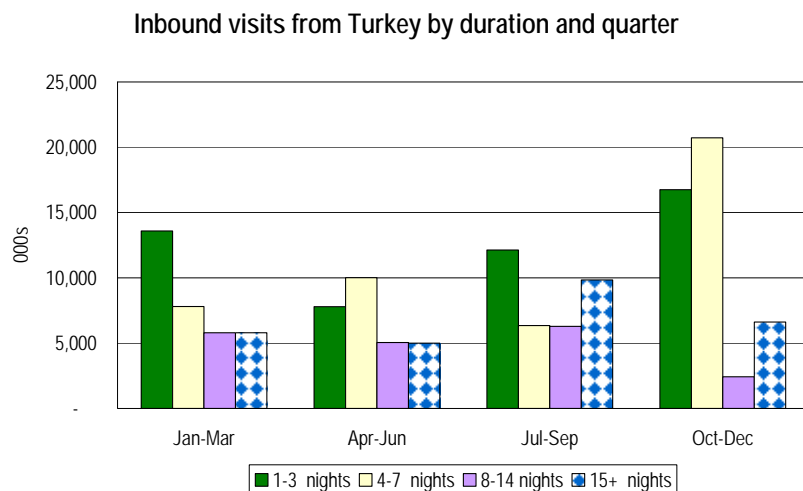
We can see that more than 60% of Turkey's population is aged under 34, whereas the age distribution of visits to the UK is dominated by those aged 25-44 (58% of all visits). We do need to be a little cautious in our interpretation here as all IPS figures for Turkey are based on small sample sizes.

## Perceptions of Britain

Results from the Anholt-GfK 2008 Nations Brand Index Survey enable us to investigate what residents of Turkey think about Britain as both a nation, and as a potential tourism destination. Unfortunately the results are not very upbeat. Respondents are asked a barrage of questions about some fifty countries, from which an overall 'score' can be deduced. Respondents in Turkey ranked the UK 20<sup>th</sup> out of 50 in terms of having an overall nation brand (ranking Japan 1<sup>st</sup> and their own country 2<sup>nd</sup>). Britain performs poorly among Turkish respondents across all dimensions that make up the 'nation brand', with a particular weakness in terms of 'people'.

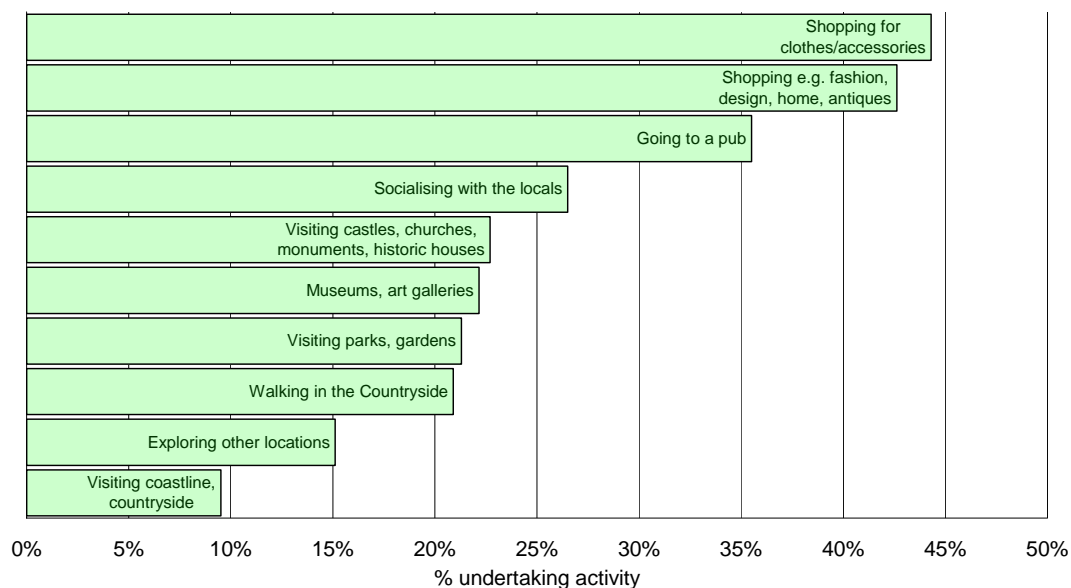
## Visit characteristics

It is clear from the chart that in 2007 the most popular time to visit Britain from Turkey was the period October to December and that typically visits are short-stay. However, it is worth noting a significant number of long-stay visits during the summer months, most likely connected with study trips.



Since 2006 VisitBritain has sponsored an 'activities' question on the International Passenger Survey and the following chart brings together results from 2006 and 2007 to show the top activities for visitors from Turkey.

## Top activities during visit to Britain



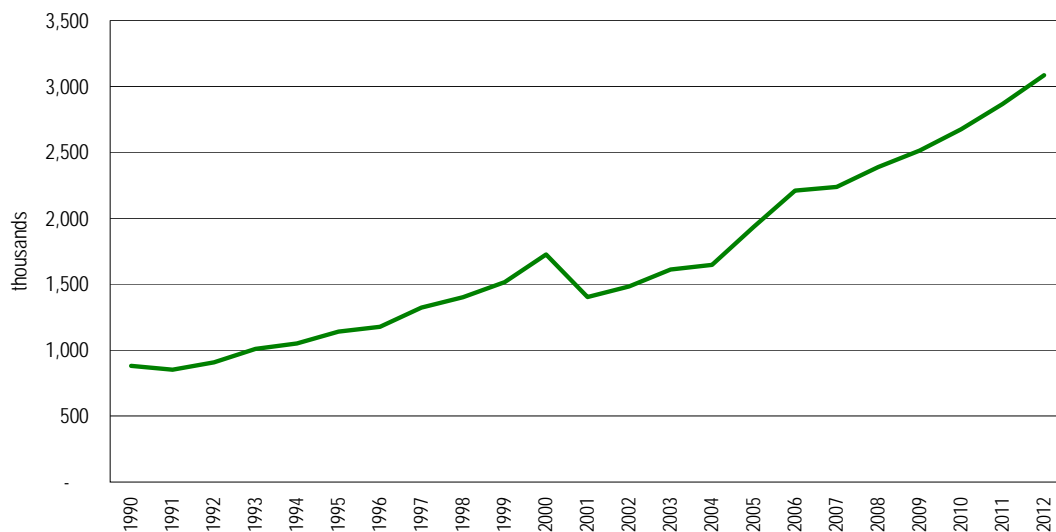
Shopping is evidently a core activity, undertaken by more than two-in-five visitors, with 'going to a pub' something that more than a third of visitors from Turkey say they did during their trip. As

is the case for just about all markets Britain's cultural and heritage assets shine through as being key attractions for Turkish visitors. It is particularly encouraging that more than a fifth visit museums or galleries, castles, churches or historic houses when one considers that 45% of all visits from Turkey are 'business' trips.

## Outbound tourism

So far we have not touched on the aggregate outbound tourism market from Turkey, but as the following chart indicates this has been a story of steady growth during the 1990s, stagnation between 2001 and 2004 and in, more recent times, healthy year-on-year increases.

### Outbound visits from Turkey



Source: Global Insight

According to Global Insight the volume of outbound visits from Turkey is set to increase by a further 40% between 2007 and 2012, but it is important to recognise that even then the number of outbound trips is estimated to be no more than around 3.1 million per annum.

## Politics and the future

Turkey's importance for inbound tourism to Britain depends crucially on the success (or otherwise) of negotiations between Turkey and the European Union over eventual EU membership. No agreement is on the horizon, and the earliest date at which Turkey is set to join remains at least a decade away. It is perhaps surprising that results from the Nations Brand Index are so unfavourable in terms of opinion about the UK given how supportive the British government has been with regard to Turkey's EU membership bid.

The political scene in Turkey is rarely dull. Recently there has been a confrontation between the ruling AKP Party and constitutional court, and many in the West are watching with interest to see how attempts by Turkey to engage more effectively with its neighbours to the East progress, and what such developments mean for Turkey's relationship with the West. On a separate front Turkey is still engaged in frequent battles with Kurdish rebels in northern Iraq.

Turkey has an air of unpredictability about it, and is presently oriented towards business rather than holiday tourism when it comes to visiting Britain, but within a decade or so there is a strong likelihood that Turkey will represent one of our twenty most valuable inbound markets.

## Issue of the Month – Information sources

Results from the 2008 Anholt GfK Nations Brand Index survey have recently been released revealing that the United Kingdom ranks 3<sup>rd</sup> in terms of 'holistic nation brand', behind Germany and France. The survey provides insight into the image of fifty nations worldwide based on the perception of 1,000 on-line respondents in each of twenty separate countries (individual respondents answer questions about 25 nations).

VisitBritain sponsors a number of questions in the survey and here we focus on questions about usage and in particular the perceived reliability of different sources of holiday information. Questions relating to sources of information that are used covered the entirety of a 'holiday journey' from getting ideas about where to go, booking, planning what to do before and during the trip and those used after the trip was over, as shown in the following box:

From the following list please select which sources you used for your last holiday for inspiration/ideas where to go  
From the following list please select which sources you used to book your last holiday  
From the following list please select which sources you used to plan activities before the holiday  
From the following list please select which sources you used to decide activities during the holiday  
From the following list please select which sources you used after your last holiday

The question on reliability read as follows:

To what extent do you think you can rely on each source to give an accurate representation of vacation destinations (on a ratings scale of 1 = not at all reliable through to 7 = very reliable)

So what sources of information were respondents asked about? The answer is a very extensive list covering no fewer than twenty-one alternatives ranging from cutting-edge sources such as video sharing websites, traditional sources such as travel guidebooks and tourist boards through to more informal sources including conversations with friends and relatives. The full list is shown in the following box:

Travel programmes on television	A city tourism organization website
Article in a magazine	Transport company website
Article in a newspaper	A walk-in tourist information centre
Advertisement on tv	Printed travel brochures
Advertisement in a magazine or newspaper	A travel agent or tour operator
Advertisement on the radio	Travel booking website
Advertisement on a website	Traveller comments posted on websites
Billboard/poster advertisement	Social networking site
Travel guidebook	Travel blog
Conversation with friends or relatives	Video sharing website
A national tourism website	

## Advocacy is king

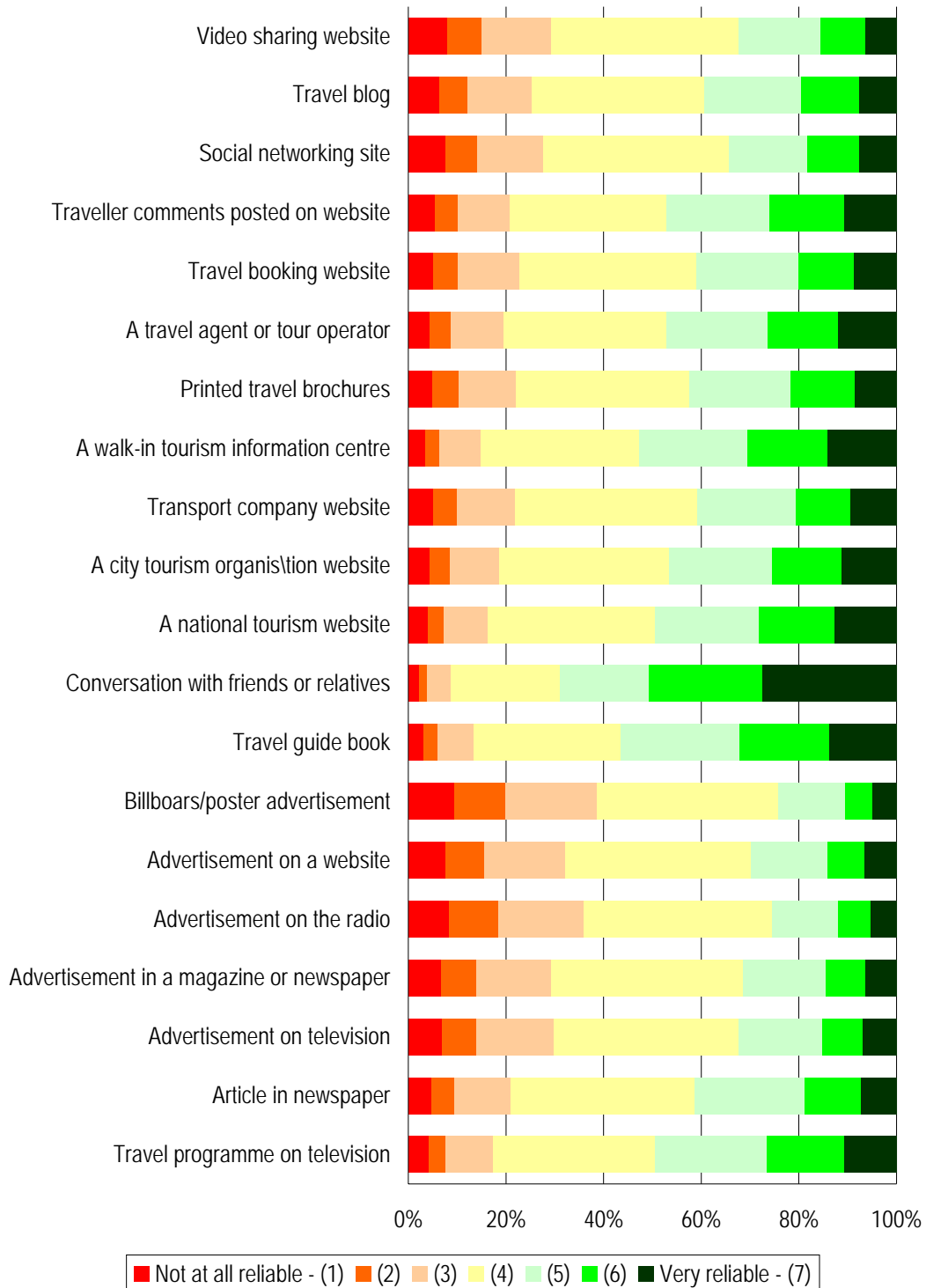
Focussing firstly on an analysis of which sources did well and which poorly in terms of 'reliability' we can see from the following chart that only one source achieved an average rating (from 1 being 'not at all reliable' through to 7 being 'very reliable') of greater than 5, namely 'conversations with friends and relatives', well ahead of all other sources. The least reliable sources were advertisements on radio, and billboard/poster advertisements.

## Reliability of source for holiday destination information



Presenting the simple arithmetic mean score for each source is certainly informative, but from the chart on the following page we get a clearer picture about how respondents reacted by showing the distribution of 'scores' for each source. It is evident that half of all respondents rated 'conversations with friends and relatives' either 6 or 7 in terms of reliability. It is interesting to note that 'new' sources such as video sharing websites, travel blogs and social networking sites engendered quite disparate scores, with roughly one-quarter giving this source a negative rating and one-quarter a positive rating, with the remainder being uncertain.

## Reliability of source for holiday destination information



### In more detail...

There are plenty of ways in which we can use information gathered by the survey to explore how views about reliability vary according to respondent characteristics. For example an analysis of the data shows that in general females were more trusting than males, those living in cities found most sources more reliable than did those living in towns, who in turn were more

trusting than rural dwellers. There was little variation in opinion by age, but younger age groups gave social networking websites and travel blogs a slightly higher reliability rating than did older groups. We can perhaps learn most by looking at what respondents in each country said about the reliability of each source, and the following table contains all the key results.

	Travel programs on television		Article in a magazine		Article in a newspaper		Advertisement on television		Ad in a magazine or newspaper		Advertisement on the radio		Advertisement on a website	
	Country	Score	Country	Score	Country	Score	Country	Score	Country	Score	Country	Score	Country	Score
7 very	South Africa	5.06	India	4.84	India	4.80	Mexico	4.64	India	4.63	Mexico	4.35	Mexico	4.61
6	Poland	4.97	Mexico	4.79	Mexico	4.64	India	4.60	Mexico	4.61	India	4.23	India	4.50
5	India	4.91	South Africa	4.62	Japan	4.51	Brazil	4.47	South Africa	4.47	China	4.17	South Africa	4.40
4 reliability	Mexico	4.81	Brazil	4.60	South Africa	4.50	South Africa	4.44	Brazil	4.40	South Africa	4.10	Argentina	4.22
3	Australia	4.64	US	4.41	Brazil	4.41	Egypt	4.26	Japan	4.25	Japan	4.10	Japan	4.20
2	Sweden	4.62	China	4.40	China	4.37	Japan	4.22	China	4.17	South Korea	3.99	Brazil	4.06
1 not at all	Brazil	4.60	Average	4.38	Argentina	4.37	China	4.21	Argentina	4.13	Brazil	3.97	Italy	4.03
	Average	4.58	Argentina	4.38	Turkey	4.35	Argentina	4.13	South Korea	4.09	Argentina	3.87	South Korea	4.02
	Russia	4.55	Japan	4.37	Sweden	4.33	South Korea	4.09	Canada	4.07	Egypt	3.83	Turkey	3.96
	China	4.55	Australia	4.37	US	4.33	Australia	4.05	Egypt	4.05	Canada	3.83	China	3.96
	UK	4.55	Sweden	4.37	Average	4.32	Average	4.04	Average	4.02	Average	3.80	Average	3.95
	Argentina	4.47	Turkey	4.33	Germany	4.31	Canada	4.01	Australia	4.01	Australia	3.78	Australia	3.95
	South Korea	4.46	Canada	4.33	Italy	4.30	UK	3.99	Italy	3.96	US	3.77	Canada	3.89
	Japan	4.46	France	4.31	South Korea	4.30	Turkey	3.97	US	3.91	Italy	3.76	UK	3.83
	US	4.45	South Korea	4.30	Canada	4.28	US	3.94	Turkey	3.87	UK	3.72	US	3.82
	Germany	4.44	Italy	4.29	Australia	4.27	Italy	3.93	UK	3.84	Turkey	3.55	Egypt	3.80
	Canada	4.44	Germany	4.26	France	4.20	Germany	3.70	Sweden	3.76	France	3.54	France	3.65
	Turkey	4.40	Poland	4.22	UK	4.17	France	3.64	France	3.73	Germany	3.52	Germany	3.58
	Italy	4.39	Egypt	4.15	Egypt	4.14	Sweden	3.63	Germany	3.70	Sweden	3.43	Poland	3.58
	Egypt	4.38	UK	4.14	Poland	4.13	Russia	3.41	Poland	3.41	Poland	3.25	Sweden	3.54
	France	4.34	Russia	3.99	Russia	3.72	Poland	3.39	Russia	3.34	Russia	3.20	Russia	3.33

	Billboard/poster advertisement		Travel guidebook		Conversation with friends or relatives		A national tourism website		A city tourism organization website		Transport company websites		A walk-in tourist information centre	
	Country	Score	Country	Score	Country	Score	Country	Score	Country	Score	Country	Score	Country	Score
7 very	Mexico	4.31	Mexico	5.21	Poland	5.85	India	5.07	South Africa	4.91	Mexico	4.84	Mexico	5.33
6	Japan	4.13	South Africa	5.15	Argentina	5.59	Mexico	5.04	Mexico	4.88	India	4.71	Argentina	5.25
5	India	4.12	Argentina	5.01	Russia	5.56	South Africa	5.01	India	4.85	South Africa	4.59	South Africa	5.11
4 reliability	South Africa	4.10	Brazil	4.97	South Africa	5.46	Argentina	4.95	Japan	4.72	Brazil	4.58	Poland	4.88
3	Brazil	4.07	India	4.97	Sweden	5.39	Italy	4.67	France	4.70	Argentina	4.55	Australia	4.87
2	China	4.05	Germany	4.92	Turkey	5.37	Poland	4.67	Italy	4.61	Japan	4.50	India	4.87
1 not at all	South Korea	3.91	Poland	4.91	Mexico	5.36	Australia	4.65	Canada	4.60	Australia	4.44	Canada	4.76
	Argentina	3.81	US	4.82	Germany	5.36	Japan	4.64	Argentina	4.59	Egypt	4.42	Italy	4.73
	Average	3.72	Average	4.80	Average	5.32	Canada	4.64	UK	4.59	Average	4.34	Average	4.73
	Australia	3.70	Australia	4.80	Brazil	5.32	UK	4.63	Australia	4.58	US	4.30	Brazil	4.73
	Italy	3.67	Canada	4.80	India	5.32	Brazil	4.63	Brazil	4.57	Italy	4.29	France	4.67
	Canada	3.66	Italy	4.79	China	5.32	France	4.63	US	4.57	Canada	4.28	Turkey	4.66
	US	3.63	UK	4.79	Canada	5.31	Average	4.63	South Korea	4.52	China	4.27	UK	4.66
	UK	3.61	France	4.77	UK	5.29	South Korea	4.60	Average	4.52	Turkey	4.25	Japan	4.61
	Egypt	3.57	Japan	4.76	Egypt	5.24	Turkey	4.60	Poland	4.47	Poland	4.22	Egypt	4.58
	Turkey	3.51	China	4.65	France	5.22	US	4.53	Germany	4.35	UK	4.21	Sweden	4.56
	Sweden	3.48	Egypt	4.60	Australia	5.18	Egypt	4.47	Egypt	4.26	Sweden	4.13	US	4.55
	Germany	3.41	Turkey	4.60	US	5.17	China	4.42	Turkey	4.25	Russia	4.10	Germany	4.54
	France	3.40	Sweden	4.59	South Korea	5.16	Russia	4.26	China	4.25	South Korea	4.10	South Korea	4.50
	Poland	3.09	South Korea	4.49	Italy	5.11	Sweden	4.22	Sweden	4.09	France	4.05	China	4.45
	Russia	3.09	Russia	4.34	Japan	4.87	Germany	4.11	Russia	3.93	Germany	3.94	Russia	4.20

	Printed travel brochures		A travel agent or tour operator		Travel booking website		Traveller comments posted on websites		Social networking site		Travel blog		Video sharing website	
	Country	Score	Country	Score	Country	Score	Country	Score	Country	Score	Country	Score	Country	Score
7 very	Mexico	4.85	Brazil	5.27	India	4.78	South Korea	4.96	Russia	4.69	South Korea	4.79	India	4.38
6	South Africa	4.83	Mexico	5.06	South Africa	4.70	Poland	4.80	Poland	4.61	China	4.59	South Africa	4.38
5	India	4.67	South Africa	5.03	Mexico	4.65	Russia	4.68	India	4.51	Mexico	4.40	Mexico	4.36
4 reliability	Japan	4.61	Argentina	4.78	Japan	4.53	India	4.63	South Africa	4.43	South Africa	4.38	South Korea	4.26
3	Argentina	4.51	Italy	4.76	Poland	4.50	China	4.63	South Korea	4.32	India	4.38	China	4.18
2	Australia	4.49	India	4.71	Italy	4.42	Germany	4.56	Mexico	4.29	Japan	4.35	Argentina	4.09
1 not at all	Canada	4.48	Canada	4.69	Brazil	4.42	Italy	4.56	China	4.21	Poland	4.34	Italy	4.08
	Italy	4.46	Australia	4.60	Australia	4.39	South Africa	4.52	Egypt	4.20	Russia	4.31	Japan	4.03
	US	4.40	Japan	4.58	Argentina	4.39	Mexico	4.49	Average	4.11	Italy	4.27	Average	4.02
	Egypt	4.40	Average	4.53	Canada	4.34	Average	4.47	Japan	4.09	Average	4.23	Canada	4.00
	Average	4.35	Sweden	4.44	Average	4.32	France	4.44	Argentina	4.07	France	4.18	Brazil	3.97
	UK	4.32	US	4.43	China	4.26	Canada	4.42	Sweden	4.06	Brazil	4.14	Poland	3.96
	Germany	4.28	Germany	4.39	UK	4.26	Japan	4.42	Italy	4.06	Canada	4.12	Russia	3.95
	France	4.27	UK	4.33	US	4.23	Brazil	4.40	Canada	4.03	Sweden	4.08	UK	3.94
	China	4.24	Egypt	4.33	Sweden	4.21	Turkey	4.39	Germany	3.98	Turkey	4.08	Turkey	3.88
	Sweden	4.22	China	4.32	South Korea	4.19	UK	4.38	Australia	3.92	UK	4.05	Australia	3.87
	Poland	4.16	Turkey	4.28	Egypt	4.10	Argentina	4.29	UK	3.91	Argentina	4.05	US	3.87
	Turkey	4.12	France	4.25	Turkey	4.08	Australia	4.23	US	3.86	US	4.02	France	3.86
	South Korea	4.08	Poland	4.14	France	3.98	Egypt	4.22	France	3.81	Germany	3.98	Egypt	3.83
	Brazil	3.88	South Korea	4.11	Germany	3.97	Sweden	4.18	Brazil	3.76	Egypt	3.98	Germany	3.81
	Russia	3.82	Russia	3.96	Russia	3.90	US	4.17	Turkey	3.39	Australia	3.97	Sweden	3.59

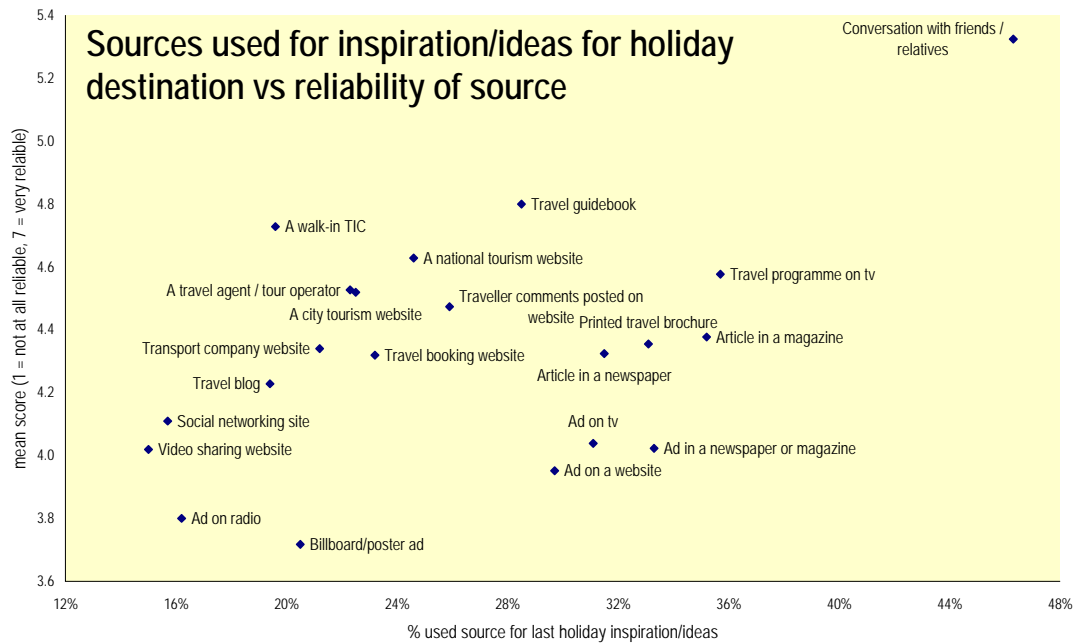
There is a wealth of information in the above table, but a few of the highlights are as follows:

- Overall Indians, Mexicans and South Africans tend to give the highest reliability ratings
- Russians stand out as being especially sceptical about the reliability of each source of information compared with other respondents, with the exception of social networking sites, which Russian respondents considered more reliable than did those in other countries
- The information sources with the broadest range of opinions were social networking sites (with a rating of 4.69 in Russia and 3.39 in Turkey) and travel agent/tour operator (with a rating of 5.27 in Brazil and 3.96 in Russia)
- The information source with the narrowest range of opinion was travel programmes on television (rated 5.06 by South Africans and 4.34 by the French)
- Respondents in all twenty countries rated conversations with friends and relatives as the most reliable source
- Three-quarters of countries placed 'national tourism website' among the top six for reliability with Indian respondents considering this to be the second most reliable source
- Eighteen out of the twenty countries placed travel guidebooks in their top three in terms of reliability (only South Koreans and Russians are slightly less sure about guidebook reliability)
- South Koreans and Chinese respondents considered travel blogs to be far more reliable than did respondents in all other countries
- Three-quarters of countries placed walk-in tourist information centres among the top five sources for reliability
- Billboard or poster advertisements were rated as one of the two the least reliable sources by all countries with the exception of Brazil and Japan
- Seventeen out of the twenty countries placed advertisements on a website in their bottom five for reliability
- Respondents in all twenty countries rated advertisements on radio as one of the four least reliable sources
- Britons tend to rate articles in magazines as being rather less reliable than do respondents in most other countries
- Respondents in the US, Japan and France considered city tourism organisation websites to be the third most reliable source, with Brits and South Koreans also rating this source highly for reliability

### **Information sources and the 'holiday journey'**

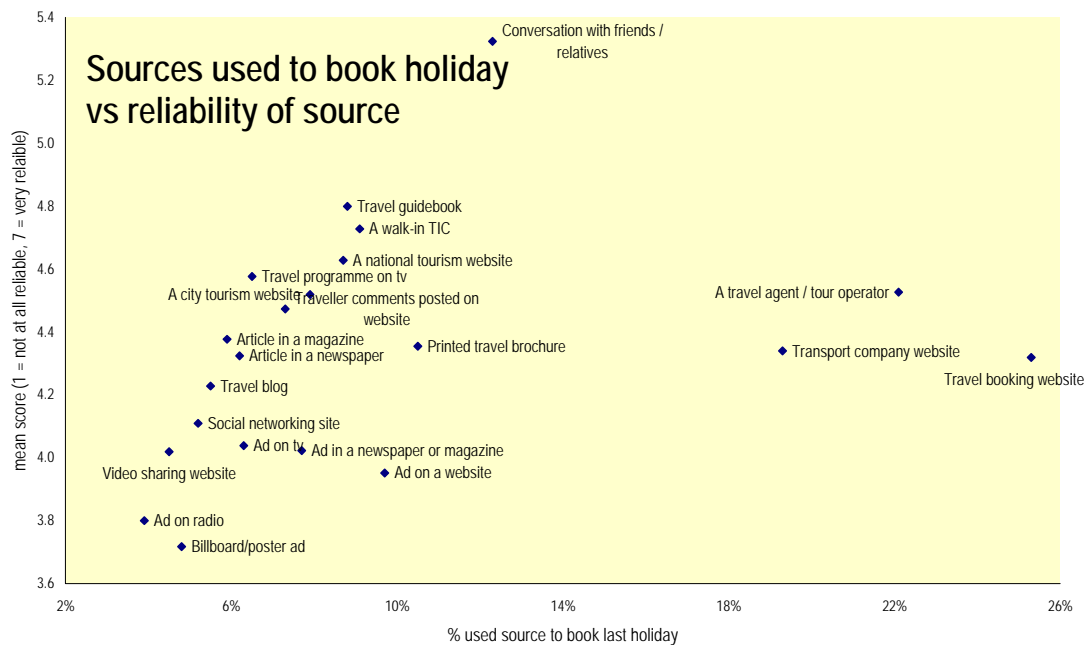
As noted earlier, respondents were quizzed not only about how reliable they considered each source of information to be, but about which sources they used in relation to their most recent holiday, covering each stage of the 'journey' from inspiration and ideas about where to go, booking, planning what to do before the trip, deciding activities during the holiday itself and finally sources that were used once the holiday was over.

The following series of scatter-plots help shed light on the extent to which each of the twenty-one sources is used at each stage of the holiday journey and the overall reliability rating that the source achieved. Starting off with the picture for sources that were used for inspiration and ideas for where to go for the most recent holiday we find that conversations with friends and relatives are in a league of their own, not only in terms of reliability rating but in terms of the proportion of respondents reporting having used this source, namely 46% of all respondents. Social networking sites and video sharing websites were among the least used sources for holiday inspiration and ideas.

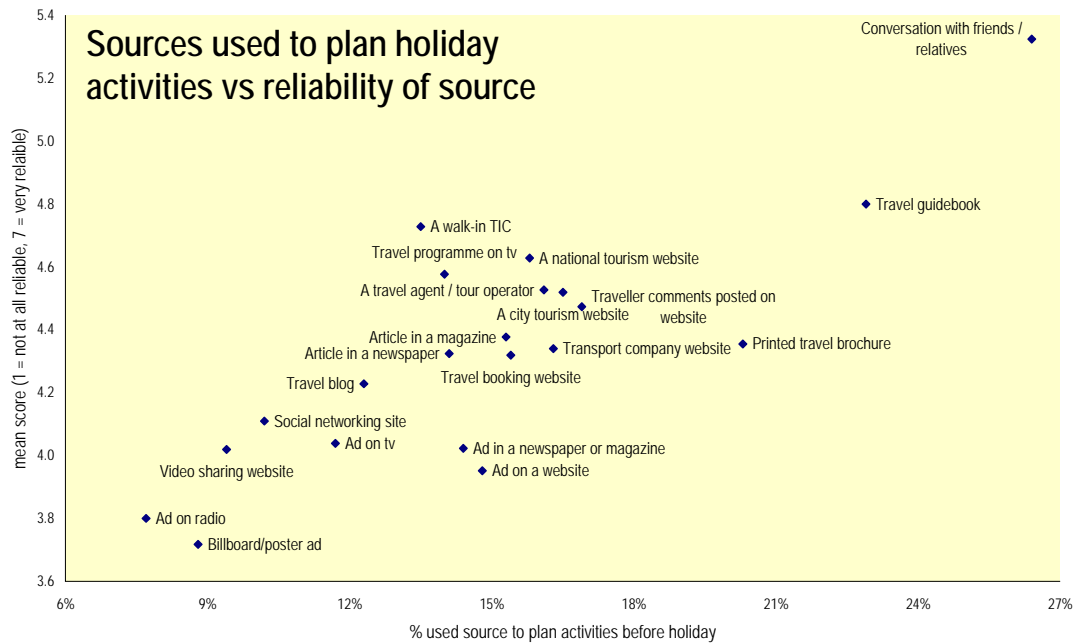


Next comes the booking phase of the holiday journey and the next chart shows that the most popular source, used by a quarter of all respondents, was a travel booking website, followed by a travel agent or tour operator (22% of all respondents used this source to book) and transport company websites (19%).

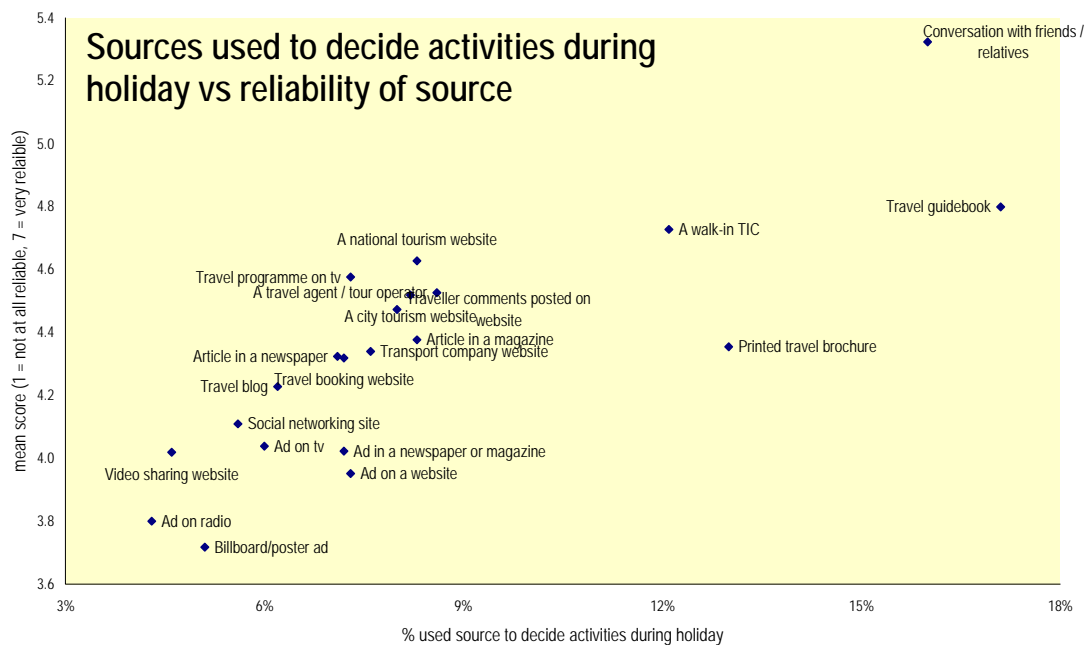
An important point to note is that survey findings are weighted to mirror the on-line population of each country, and as such web-based tools are likely to be over represented, although with web access increasingly common in developed countries this will not have a major impact on aggregate results.



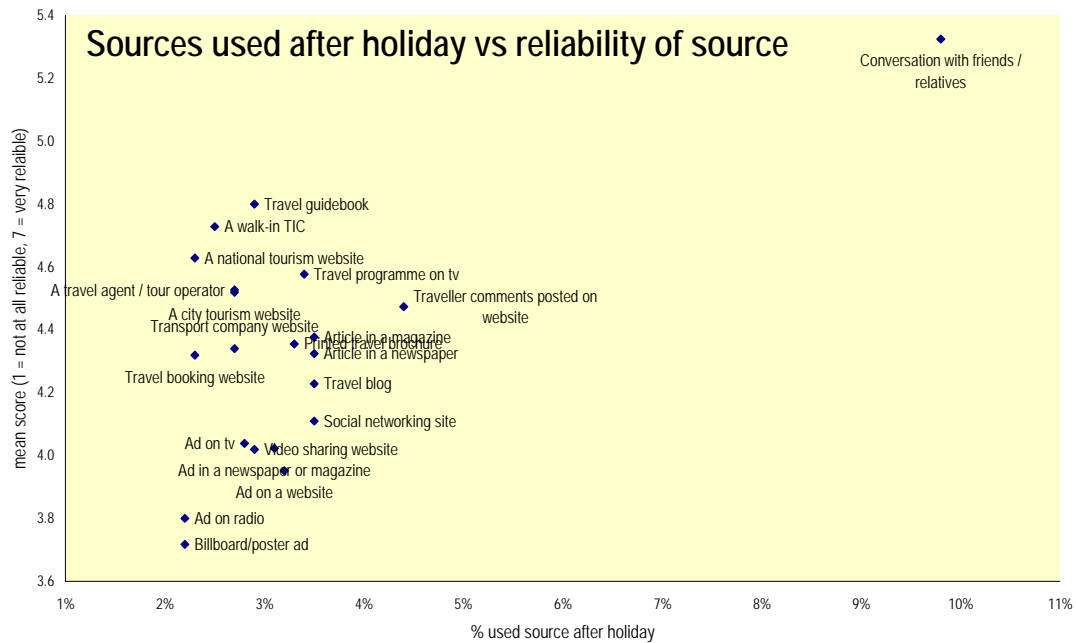
Conversations with friends and relatives and travel guidebooks are to the fore when it comes to planning what activities will feature in an upcoming holiday (26% and 23% of respondents reporting use of these sources) with printed travel brochures in third spot.



The percentage of respondents using the various information sources starts to drop off considerably when we get to the 'deciding activities during the holiday' stage, with travel guidebooks (17%) and conversations with friends and relatives (16%) the most popular. One-in-eight (12%) of respondents reported having used a walk-in Tourist Information Centre to help decide on activities during their most recent holiday.



Finally we come to sources used after the holiday is over, and 'conversations with friends and relatives' once again stands apart from all other sources, used by one-in-ten respondents. It is interesting to note that, although only 4% of respondents reported having used it, the second most popular source in the post-holiday period is 'traveller comments posted on a website'.



It is possible, though not done here, to delve far deeper into the data to explore usage of each information source at each stage of the 'holiday journey' in terms of respondent characteristics and country of residence. This represents an unparalleled opportunity to enhance our understanding of who uses which information sources to get ideas, book their holiday, plan holiday activities and share their reflections once the holiday is over, all set against the backdrop of the degree to which respondents consider the source as reliable.

Early in 2009 VisitBritain will be publishing updated Market and Trade Profiles and for those markets that are covered by the Nations Brand Index Survey (some seventeen countries in total) we will report on the usage and perceived reliability of the various information sources at each stage of the 'holiday journey', uncovering insights such as whether or not Swedes rely more on travel blogs than travel agents for holiday destination inspiration and the extent to which Indians depend on travel guidebooks and conversations with friends to plan what to do during a holiday.

One finding from the preceding analysis stands out; people all over the world love to talk about their holiday plans and holiday experiences with friends and relatives. The learning from this conclusion is clear for both destinations and tourism businesses, if what is on offer is a first-rate holiday experience that delivers value for money then 'word-of-mouth' will ensure a steady flow of new customers, but equally, a poor quality holiday experience is not something about which the homebound tourist will keep schtum about.

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Japan, Hong Kong, Philippines and Taiwan
Brazil, Argentina, Chile and Venezuela
Norway, Sweden, Denmark and Finland
Britain
UAE, Saudi Arabia, Kuwait and Iran
Germany, Austria and Switzerland
Malaysia, Thailand and Singapore
Greece, Romania, Bulgaria and Croatia
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