

FORESIGHT is a monthly commentary on significant issues within the tourism sector. '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' showcases results from an 'activities' question included in the 2007 International Passenger Survey, and 'Issue of the Month' looks at the role immigration and emigration plays in tourism flows to and from Britain.

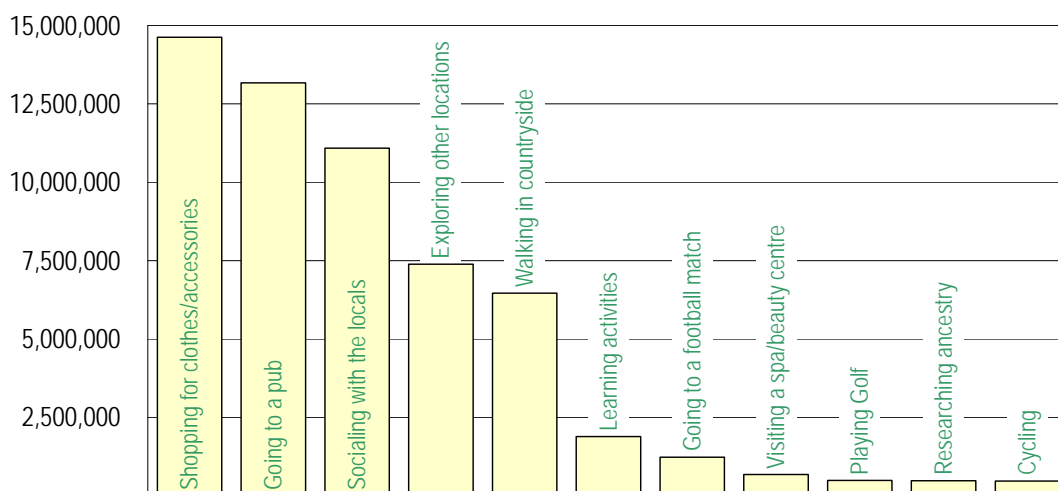
Market Focus – Activities undertaken by inbound visitors

As in 2006 VisitBritain sponsored an 'activities' question in the 2007 International Passenger Survey¹, with a number of activities being asked about for the first time. A detailed look at results from the 2006 activities question can be found in the October 2007 edition of *Foresight*.

The following chart reveals which of the activities asked about in 2007 were done by the most visitors and which by the least. Shopping for clothes or accessories was the most popular activity, undertaken by 45% of visitors, but we should note that some survey respondents may have included other forms of shopping when they stated that this was an activity they had participated in during their stay.

Spending time in a pub is clearly seen as an integral part of a visit to Britain among visitors from overseas, with two-in-five visits, that's some 13 million, including this activity during 2007. At the other end of the spectrum we find that a mere 1.5% of visits involved playing golf, researching ancestry or cycling, but nonetheless this still equates to a market of nearly half a million over the course of a year. More than 1.2 million visits (3.7%) involved attending a football match in 2007, nearly twice as many as included a visit to a spa or beauty centre.

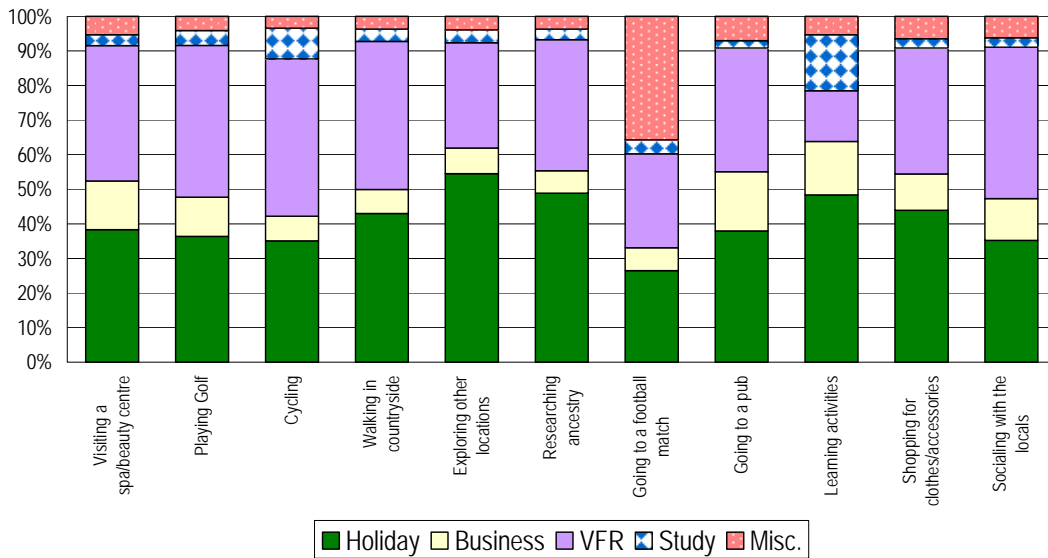
Activities undertaken during visit 2007
(multiple responses allowed)



Characteristics

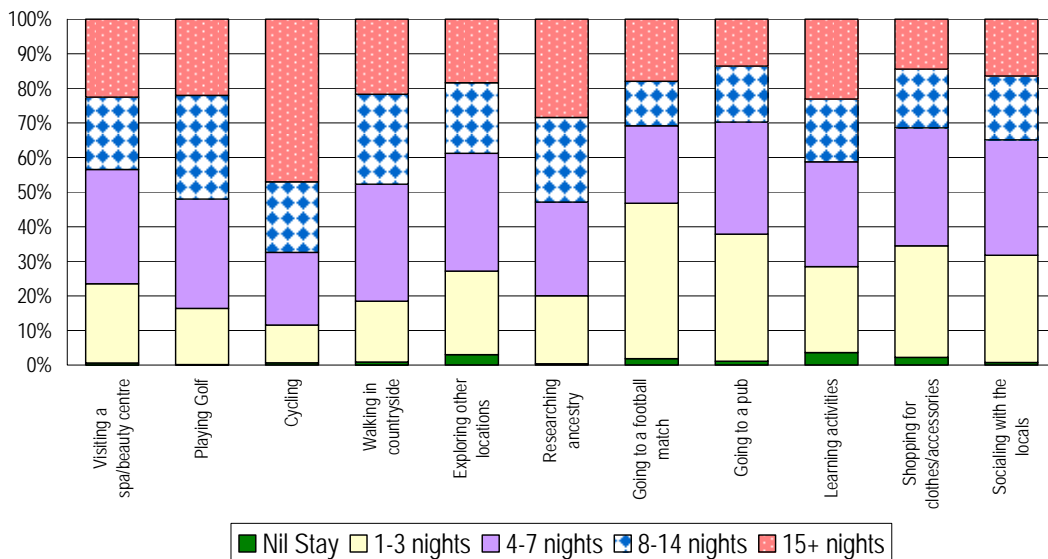
The following series of charts highlight some key information on which types of visitors do each of the activities that respondents were quizzed about. Starting with the main journey purpose of visitors saying they undertook each activity we discover that more than half of visitors who said they 'explored several locations' were in Britain on holiday. The fact that well over one-third of visitors who went to a football match had a 'miscellaneous' journey purpose indicates that attending the match was their primary motive for coming to Britain. Some 44% of visits that included playing golf had 'visiting friends and relatives' as their primary trip purpose while more than one-in-six visits that included a trip to a pub was a business visit.

Proportion undertaking activity by trip purpose



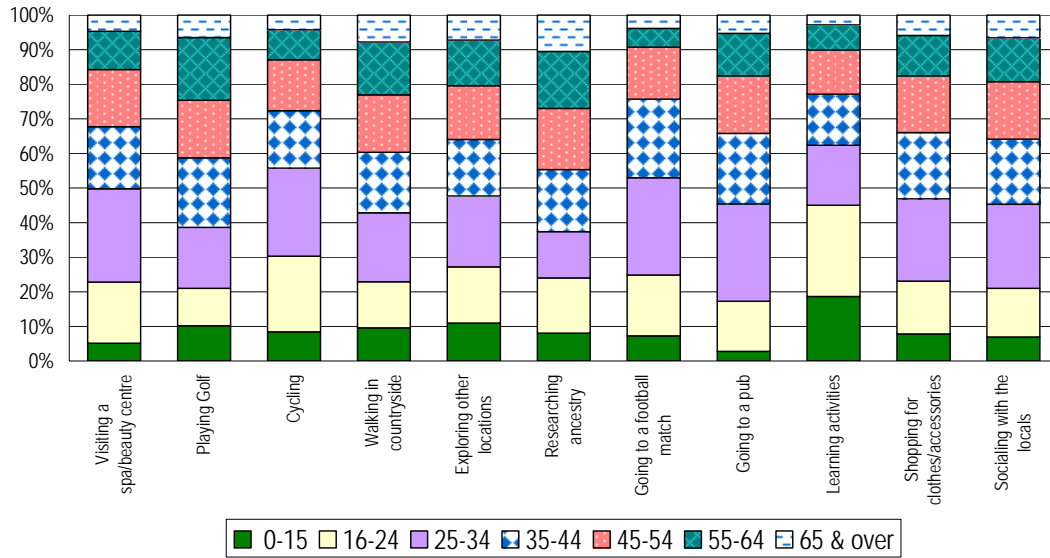
There are some interesting variations in terms of the activities undertaken by visitors with different duration of stay; nearly 45% of those who went cycling were in Britain for 15+ nights whereas 45% of those going to a football match during their visit were here for 3 nights or less.

Proportion undertaking activity by duration of stay



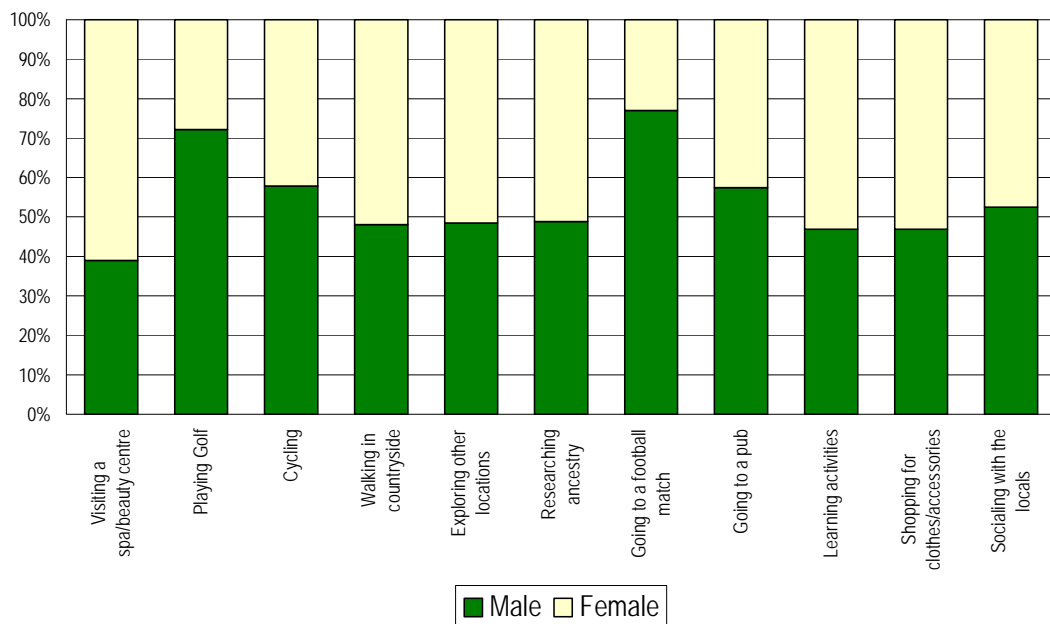
As can be seen from the following chart focussing on age, nearly two-thirds of visitors who undertook a 'learning activity' in 2007 were aged 34 or younger, whereas more than three-in-five of those 'researching ancestry' or 'playing golf' during their visit were aged 35 or over.

Proportion undertaking activity by age group



From the next chart we discover the gender mix for each activity, and it is apparent that three-quarters of visits that involve either playing golf or going to a football match are by males, while more than 60% of trips that include visiting a spa or beauty centre were by females.

Proportion undertaking activity by gender



Making the most of a Visit to Britain

It is plain to see from the table that Kiwis who visit Britain are determined to make the most of the experience, as for no fewer than six of the activities covered visitors from New Zealand are the most active. Other points to note include Norwegians passion for watching British football, whereas for visitors from Taiwan this activity holds little interest.

Most and least likely to undertake activity		
Activity	Most likely	Least likely
Visiting a spa/beauty centre	Czech Republic	Japan
Playing Golf	New Zealand	Taiwan
Cycling	Chile	Norway
Walking in countryside	New Zealand	South Korea
Exploring other locations	New Zealand	Luxembourg
Researching ancestry	New Zealand	Saudi Arabia
Going to a football match	Norway	Taiwan
Going to a pub	New Zealand	Pakistan
Learning activities	Chile	Argentina
Shopping for clothes/accessories	Iceland	South Korea
Socialing with the locals	New Zealand	South Korea

Pick and mix

The following table may look as though it needs a bit of deciphering, but in reality is easy to get to grips with. For each activity it shows the likelihood of each of the other activities also being undertaken by the visitor during his or her stay in Britain. This is done by way of showing for 100 visitors undertaking activity 'a', the number who also undertook activity 'b', 'c', and so on. So, what are some of the most interesting findings?

- Out of 100 visitors who played golf only five also visited a health or beauty centre
- Out of 100 visitors who cycled, 74 also spent time in a pub
- Out of 100 visitors who researched ancestry only 7 went to a football match
- Out of 100 visitors who undertook a learning activity 69 shopped for clothes or accessories

Mix of activities undertaken during visit	Visiting a spa/beauty centre	Playing Golf	Cycling	Walking in countryside	Exploring other locations	Researching ancestry	Going to a football match	Going to a pub	Learning activities	Shopping for clothes/accessories	Socialing with the locals
Visiting a spa/beauty centre	100	5	6	46	40	4	6	64	14	82	56
Playing Golf		100	8	44	35	3	10	74	8	67	66
Cycling			100	65	49	4	12	74	17	72	69
Walking in countryside				100	56	4	5	65	13	73	62
Exploring other locations					100	4	4	59	14	74	56
Researching ancestry						100	7	66	16	76	74
Going to a football match							100	74	9	63	55
Going to a pub								100	7	66	58
Learning activities									100	69	57
Shopping for clothes/accessories										100	51
Socialing with the locals											100

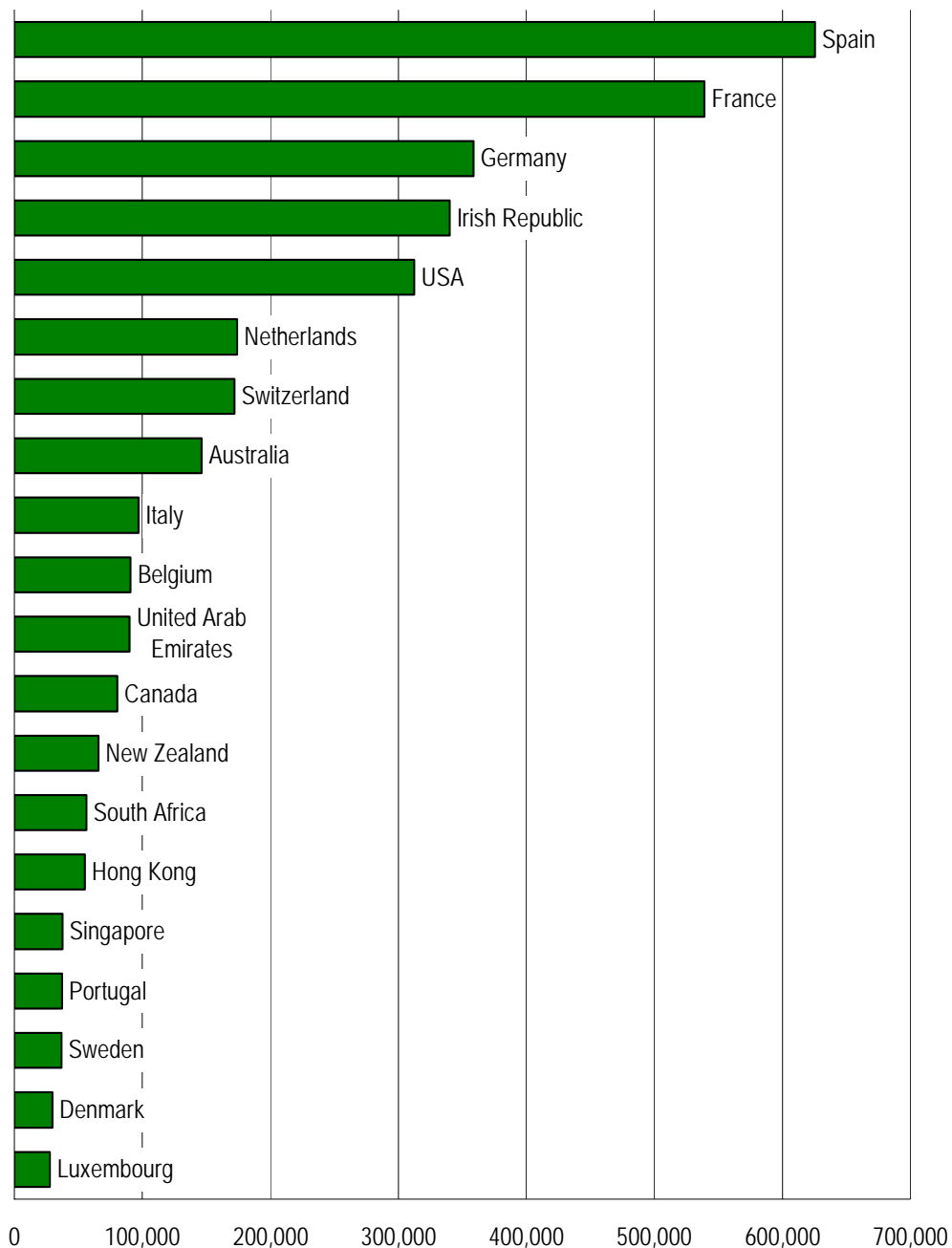
More information

The newly released VisitBritain Market and Trade Profiles provide detailed information relating to the mix of activities undertaken by visitors from each of three-dozen markets and can be found at www.visitbritain.com/research. An analysis of activities undertaken by region/nation will be published during April 2009. VisitBritain again included an 'activities' question in the 2008 survey, the results of which will be available in the autumn and include activities as diverse as 'dining in a restaurant', 'using a tourist information centre' and 'using the Internet'.

Issue of the Month – Immigration and Emigration

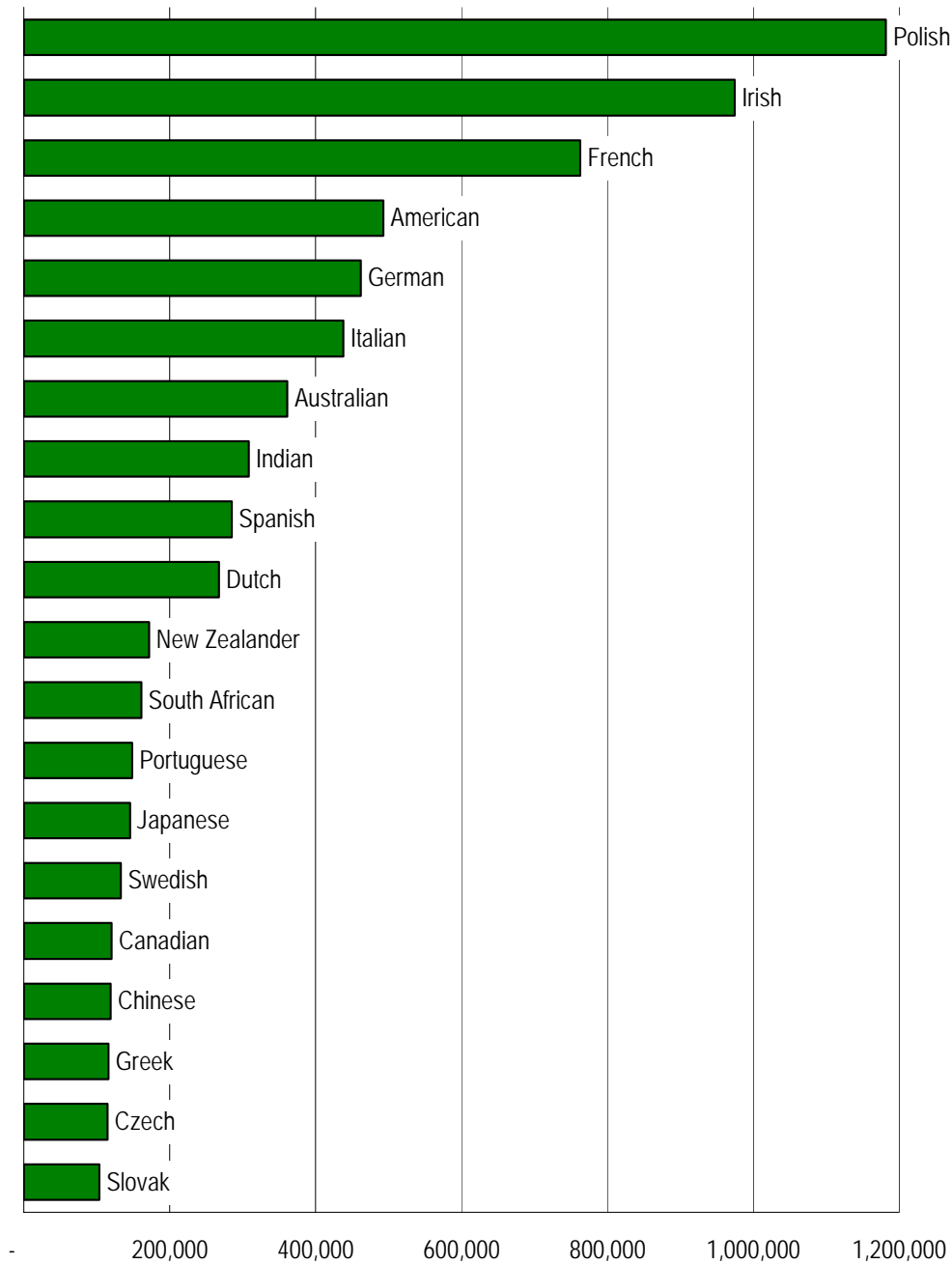
The diversity of the resident population across Britain and the large number of Britons who live permanently abroad is a significant motivator for international travel to and from Britain. In 2007 four million inbound visitors were British passport owners according to the International Passenger Survey, that's equivalent to one-in-eight visitors. The following chart shows the main countries of residence for this market segment, and we can see that ex-pats living in both Spain and France made more than half a million visits.

Inbound visits by British nationals by country of residence



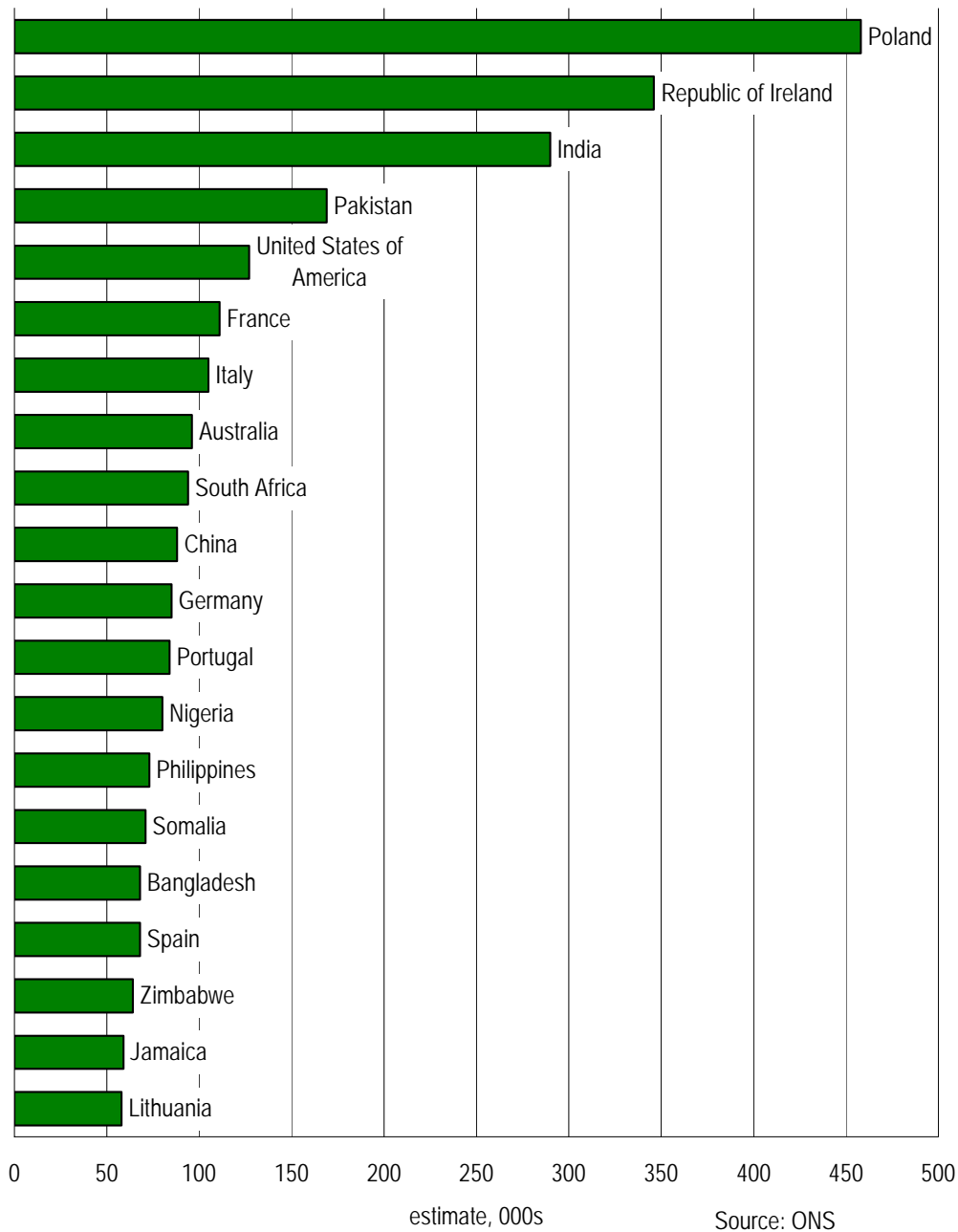
Equally we can look at the number of outbound visits by UK residents who were not British nationals, and it is apparent from the following chart that more than one million outbound trips from the UK in 2007 were by Polish nationals, and nearly a further one million by Irish nationals. In total non-British UK residents made 9.7 million outbound trips, that's one-in-seven of all outbound visits.

Outbound visits by UK residents with non British nationality



The Office for National Statistics recently published figures based on both the Annual Population Survey and Labour Force Survey covering estimates for the number of UK residents for the period July 2007 to June 2008 in terms of nationality and country of birth. The figures reveal that around 4% of the resident population has non-British nationality and the following chart shows that the largest group of foreign nationals were from Poland, followed by those from Ireland and India.

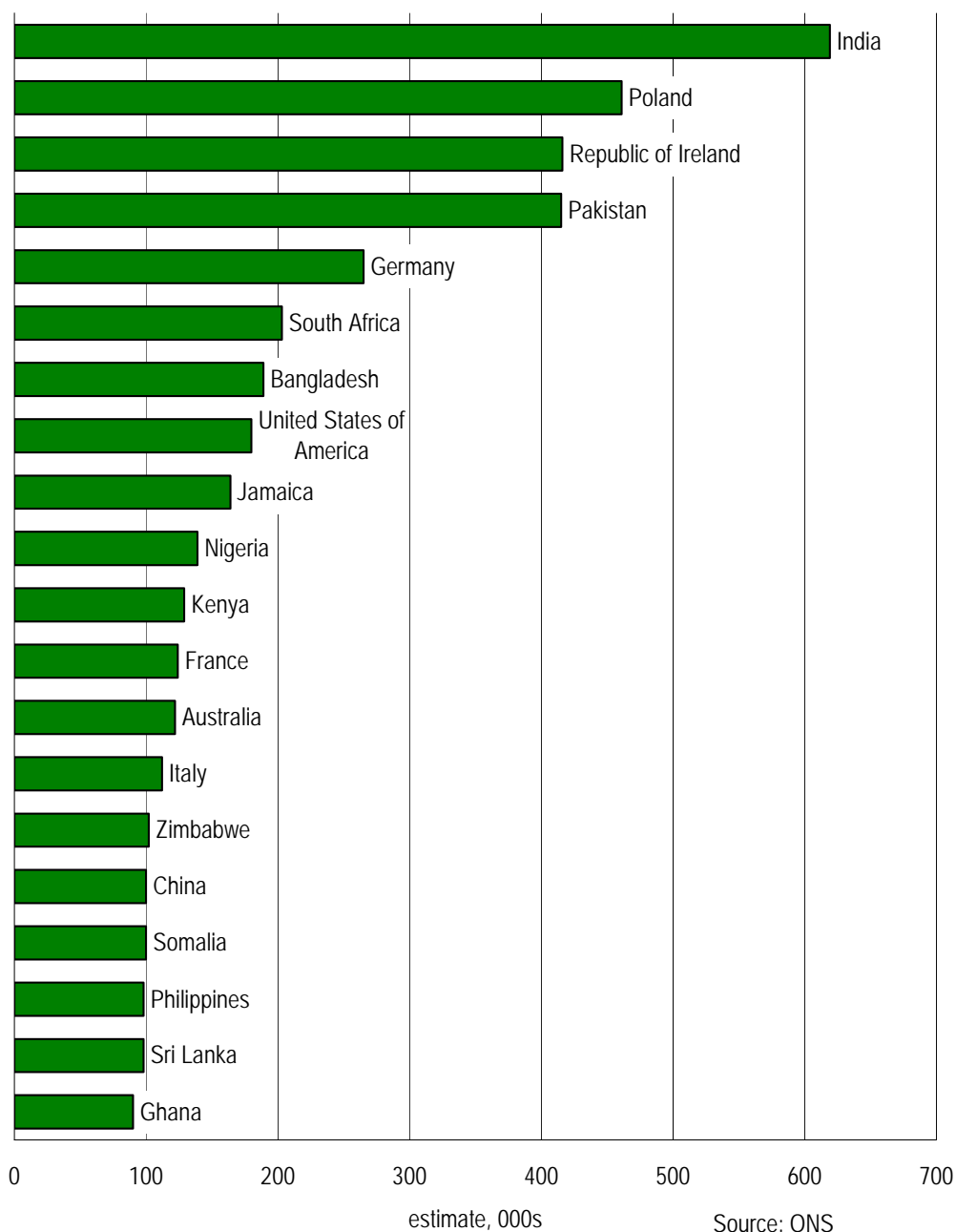
Estimated resident population of United Kingdom by foreign nationality



Rather than looking at nationality if we study the figures for country of birth of UK residents we discover that 600,000 residents were born in India. The reason for twice as many residents having India as their country of birth as have Indian as their nationality will be courtesy of many long-term residents having become British citizens. By contrast, migration from Poland to Britain is a much more recent phenomenon, which explains why the number of Polish nationals is very similar to the number whose country of birth is Poland.

In total 6.5 million UK residents, or 11% of the total, were born outside the United Kingdom according to the estimates.

Estimated resident population of United Kingdom by foreign country of birth

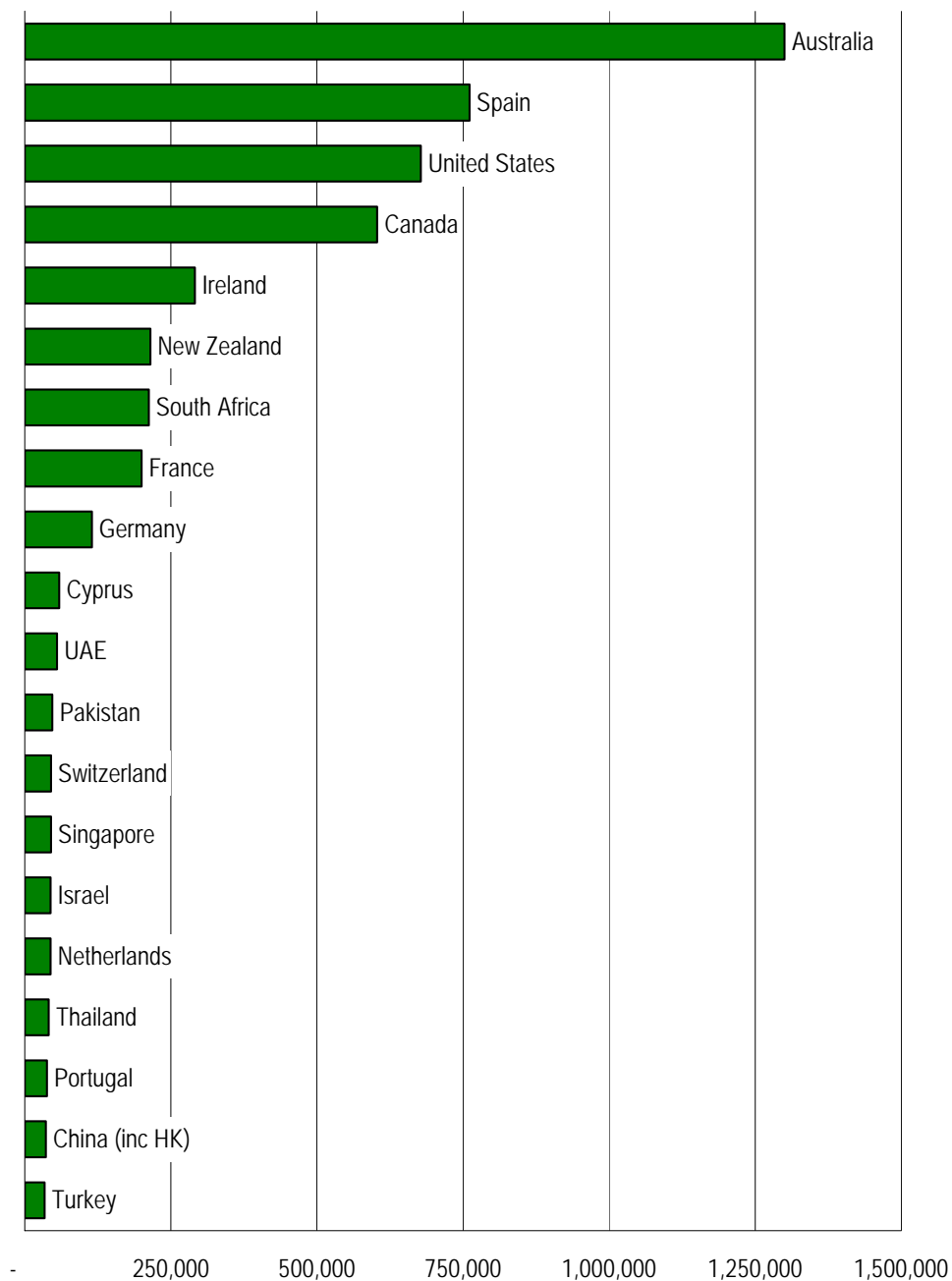


The fact that the UK resident population has such diverse ancestry is a clear fillip to the inbound tourism industry, most notably in the number of visiting friends and relatives trips that it generates, but as we have seen many Britons make inbound visits to the UK from foreign countries in which they are permanently resident. The next chart presents estimates from the Institute of Public Policy Research relating to the number of Britons permanently living abroad.

Well over one million Britons live in Australia, with a further 750,000 living in Spain. In total it is estimated that more than 5.5 million Britons reside outside of the United Kingdom, helping to explain why one-in-eight visitors to the country is in fact a British passport holder.

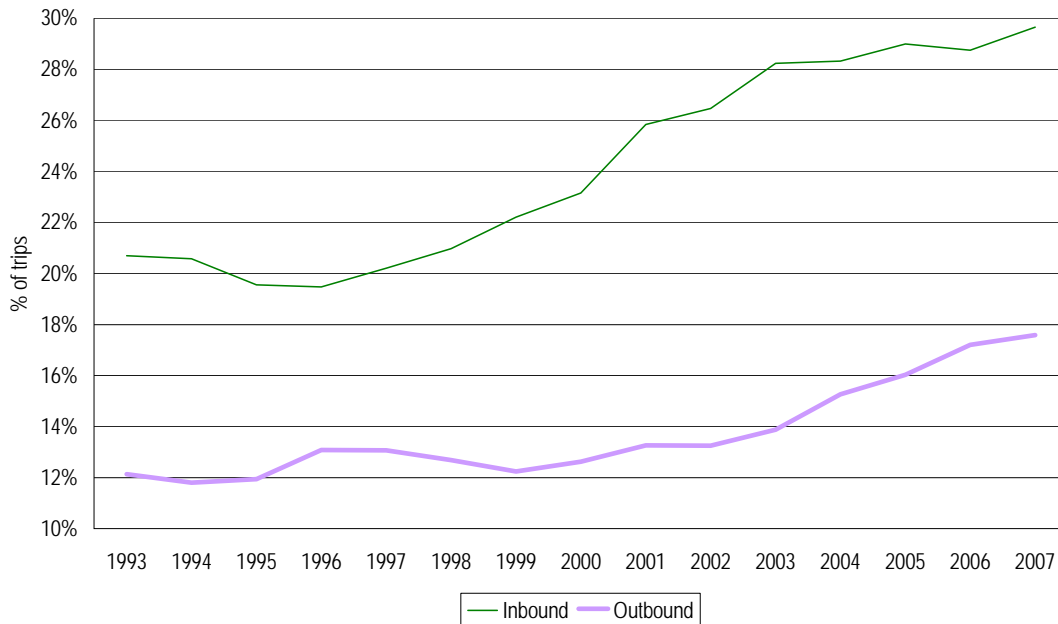
Britons living permanently abroad

Source: IPPR



The effect that the growing number of Britons living abroad and overseas nationals living in Britain has on inbound tourism is most evident when looking at trips, either inbound or outbound, that are to visit friends or relatives. We can see from the following chart that the proportion of visits that is to visit friends or relatives has risen markedly since 1993. Back in the early 1990s 12% of outbound trips and 21% of inbound was 'vfr' traffic, whereas in 2007 the respective figures stood at 18% and 30%. In terms of numbers, no fewer than 9.7 million inbound and 12.2 million outbound trips were to visit friends or relatives in 2007.

The rise and rise of Visiting Friends and Relatives



Global village

The ease with which Britons can live or work abroad, and the attractiveness of Britain as a place to settle for overseas residents represents one of the most reliable, if not high yield, sources of inbound tourism demand. The comings and goings of immigrants and emigrants helps to sustain air, sea and rail route connectivity, and as we discovered earlier in this edition of *Foresight* inbound visitors here to visit friends or relatives take part in a wide range of activities that bolsters the coffers of many tourism businesses. Perhaps the single most important benefit to the tourism sector derived from Britain's diverse population is that of advocacy; there can be few more powerful forces attracting visits to a country than a positive portrayal of what is on offer coming from a friend or relative with 'insider knowledge' inviting you to 'explore Britain'.

This supposition is based on strong research evidence; VisitBritain sponsored questions included in the Anholt-GfK Nations Brand Index survey demonstrated that 'word of mouth' was not only the most common source of holiday destination inspiration (46% saying this had been a source of inspiration for their last holiday) but was also rated as the most reliable source of destination information.

Index

Issue 1	November 2003
Issue 2	December 2003
Issue 3	January 2004
Issue 4	February 2004
Issue 5	March 2004
Issue 6	April 2004
Issue 7	May 2004
Issue 8	June 2004
Issue 9	July 2004
Issue 10	August 2004
Issue 11	September 2004
Issue 12	October 2004
Issue 13	November 2004
Issue 14	December 2004
Issue 15	January 2005
Issue 16	February 2005
Issue 17	March 2005
Issue 18	April 2005
Issue 19	May 2005
Issue 20	June 2005
Issue 21	July 2005
Issue 22	August 2005
Issue 23	September 2005
Issue 24	October 2005
Issue 25	November 2005
Issue 26	December 2005
Issue 27	January 2006
Issue 28	February 2006
Issue 29	March 2006
Issue 30	April 2006
Issue 31	May 2006
Issue 32	June 2006
Issue 33	July 2006
Issue 34	August 2006
Issue 35	September 2006
Issue 36	October 2006
Issue 37	November 2006
Issue 38	December 2006
Issue 39	January 2007
Issue 40	February 2007
Issue 41	March 2007
Issue 42	April 2007
Issue 43	May 2007
Issue 44	June 2007
Issue 45	July 2007
Issue 46	August 2007
Issue 47	September 2007
Issue 48	October 2007
Issue 49	November 2007
Issue 50	December 2007
Issue 51	January 2008
Issue 52	February 2008
Issue 53	March 2008
Issue 54	April 2008
Issue 55	May 2008
Issue 56	June 2008
Issue 57	July 2008
Issue 58	August 2008
Issue 59	September 2008
Issue 60	October 2008
Issue 61	November 2008
Issue 62	December 2008
Issue 63	January 2009
Issue 64	February 2009
Issue 65	March 2009

Market Focus

USA, Canada and Mexico
France, Italy, Portugal and Spain
Poland, Russia, China and South Korea
Britain
Australia and New Zealand
The EU Accession States
South Africa, Nigeria, Kenya and Ghana
India and Pakistan
Belgium, Netherlands, Luxembourg and Ireland
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
Israel, Egypt and Turkey
Poland, Czech Republic and Hungary
USA, Canada and Mexico
France, Italy, Spain and Portugal
Latvia, Lithuania, Estonia, Ukraine and Belarus
Russia and China
Australia, New Zealand and South Africa
India, Sri Lanka and Bangladesh
Twenty-five years of Inbound Tourism
Benelux and Ireland
Japan, South Korea and Hong Kong
Brazil, Argentina and the Caribbean
Nordic region and Iceland
Central Europe
UAE, Kuwait, Bahrain and Oman
North Africa, Malta and Cyprus
Inbound tourism - the global context
Singapore, Malaysia and Thailand
Greece, Turkey, Bulgaria and Romania
Inbound visits by the over 55's
Outlook for Inbound Tourism in 2007
USA and Canada
Ferry passenger visitors
What will shape tourism in the next decade?
The value of tourism in the UK
India and Japan
Inbound holiday visitors
The changing face of overnight domestic tourism
Inbound visitors using the Channel Tunnel
Inbound visitors aged 16-24
Special edition: Inbound visitors' travel group composition and 'activity mix
Poland, Czech Republic and Hungary
The Credit Crunch
Outlook for Inbound Tourism in 2008
Inbound 1-3 night visits
Lesser known Asian markets
The Middle East
Inbound visitors staying 15+ nights
Special edition: Business tourism
The DCMS 'Taking Part' Survey
USA
Russia and China
Camping and caravanning
Visits to visitor attractions
Turkey
Outlook for Inbound Tourism in 2009
Britain as part of a multi-country trip
Special edition: Forty years since the Development of Tourism Act
Latin America
The value of the visitor economy

Issue of the Month

Implications of an ageing population in Britain
Airport capacity in Britain
Visits to Britain by British Nationals living overseas
School holidays and their impact on seasonal spread
West Nile Virus
The Internet Part 1: Consumers
The Internet Part 2: Businesses
Trends in Cross-Channel Travel Behaviour
Cost of visiting Britain compared with other destinations
What might climate change mean for tourism in Britain
London's Olympic Bid – implications for British Tourism
Smoking in public places
Outlook for inbound tourism to Britain in 2005
Inbound tourism and the value of Sterling
Britain's ethnic diversity
Britain's transport infrastructure
Foreign Direct Investment & inbound business tourism
Inbound study visits
Low-cost Airlines
Weddings, Stag Weekends and Hen Weekends
The Day Visit Market
Quality
Daylight Saving
Outlook for Inbound Tourism in 2006
Tourism Satellite Accounts
Tourism and the Disability Discrimination Act
Tourism and the National Lottery
Next generation aircraft
The cruise line boom
The power of football
Wind Farms and the Visitor Economy
International tourism balance of payments deficit
Inbound visitor decision lead times
Seasonality
Second homes
Accommodation choices
Holiday activity perceptions (Part 1)
Holiday activity perceptions (Part 2)
The role of nature and wildlife in UK tourism
The impact of the Channel Tunnel Rail Link
Climate change and what it might mean for UK tourism
Domestic consumers and the 'credit crunch'
The British Weather
Heathrow Terminal 5
The EU/US Open Skies Agreement
Information sources: usage and reliability
The Euro
The value of the visitor economy

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