

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' considers different trip characteristics between male and female inbound visitors and 'Issue of the Month' looks at the importance of coach travel to UK tourism.

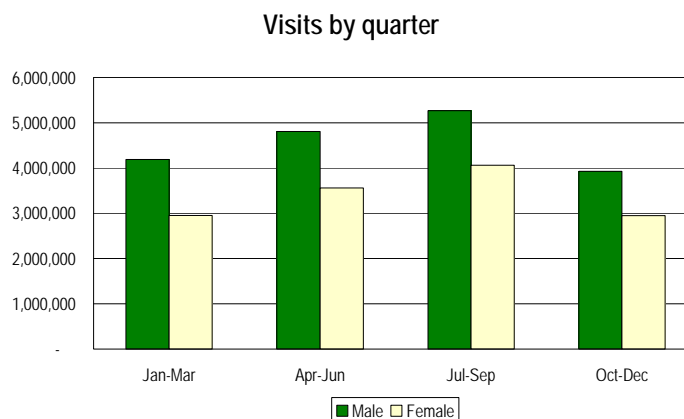
Market Focus – Gender of inbound visitors

In 2008 the UK welcomed nearly five million more male than female inbound visitors¹. The following table highlights this and many other 'metrics' that help to describe inbound tourism during 2008 in terms of gender.

	Visits		Nights		Spend		Nights per visit	Spend per	
	(000s)	(%)	(m)	(%)	(£m)	(%)		Night	Visit
Male	18,196	57%	127	52%	9,616	59%	7.0	£76	£528
Female	13,526	43%	119	48%	6,572	41%	8.8	£55	£486

Men account for almost 60% of inbound visitor spending, but there is far less of a gap between the number of male and female visitor nights, courtesy of the fact that the average inbound female visitor spends nearly two more nights than does the average male visitor to the UK. This means that average spend per visit is not hugely different, but typically male inbound visitors spend 40% more per night than females.

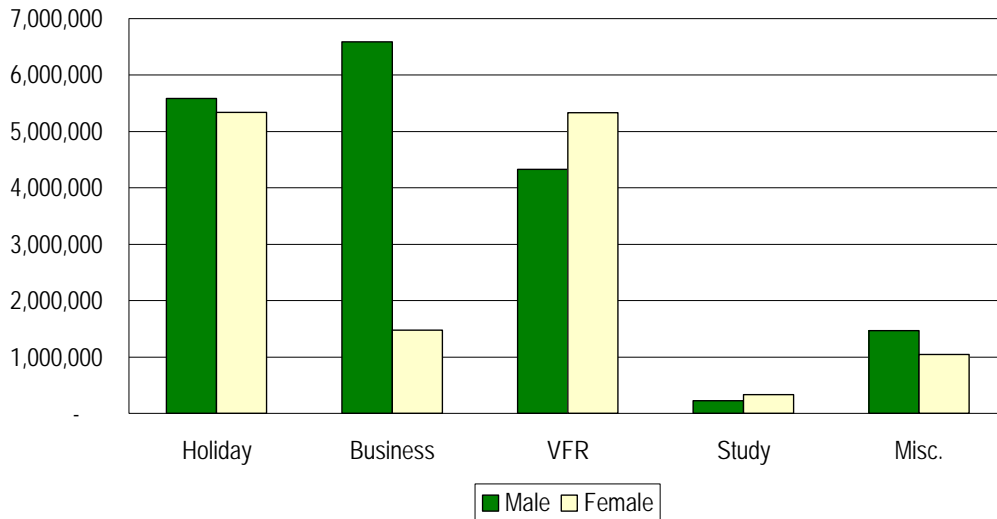
The tendency for more male than female visitors coming to Britain is not peculiar to any one time of year as we can see from the chart, with a very similar pattern in each quarter, and July to September being the most popular time to visit for both sexes.



Journey purpose

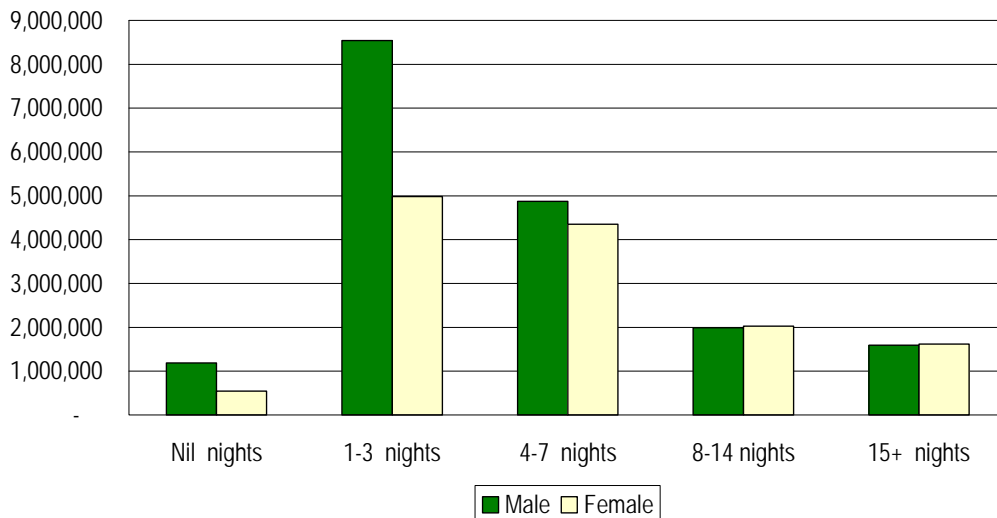
There are more differences than similarities once we start looking at the number of inbound visitors by sex, most strikingly so when it comes to business visits. In 2008 more than eight in ten inbound business visits were by men. By contrast one million more women made a trip to Britain to visit friends or relatives than did men; for holidays there was a fairly even gender split and for study trips females were in the ascendancy, accounting for six in every ten trips.

Visits by purpose



The predominance of men within the business visits category goes a long way to explaining the differences that appear when we look at duration of stay, with men accounting for nearly two-thirds of all 1-3 night stays but only half of all stays that last eight or more nights.

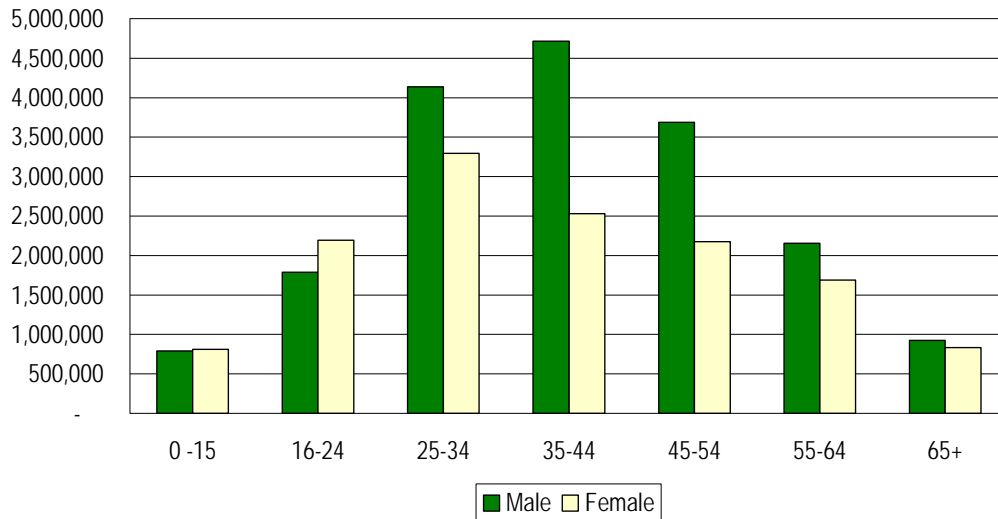
Visits by duration



Age profile

The only age-bands for which there are more female than male visitors are the under 15's and 16-24's, but even here the difference is relatively small. There are 2.2 million more male than female visitors whose age is between 35 and 44, with the equivalent figure for the 45 to 54 age group being 1.5 million.

Visits by age-band



Top markets

From the table we can see that there are no major differences in top markets measured in terms of visits by men or women, but that Germany comes somewhat higher in the male table as 61% of all visits from this market are by men.

The proportion of visitors who are male is particularly high for Middle East markets, most notably Saudi Arabia where four out of every five visitors to Britain in 2008 was a man.

	Male (000s)	Female (000s)
France	1,925	1,711
Germany	1,769	1,313
USA	1,646	1,243
Irish Republic	1,620	1,135
Netherlands	1,158	888
Spain	1,088	739
Poland	921	653
Italy	905	572
Belgium	605	475
Australia	484	426

The sexes agree...

According to the Anholt-GfK Nations Brand Index survey that took place in the summer of 2008 the opinions held about key issues relating to the UK's tourism offer, for example Britain's cultural heritage, do not differ all that much between men and women as can clearly be seen from the following chart.

The statement generating the least favourable, though by no means dismal, response was 'If I visited this country they would make me feel very welcome'. The survey quizzed roughly one thousand on-line respondents in each of twenty countries.

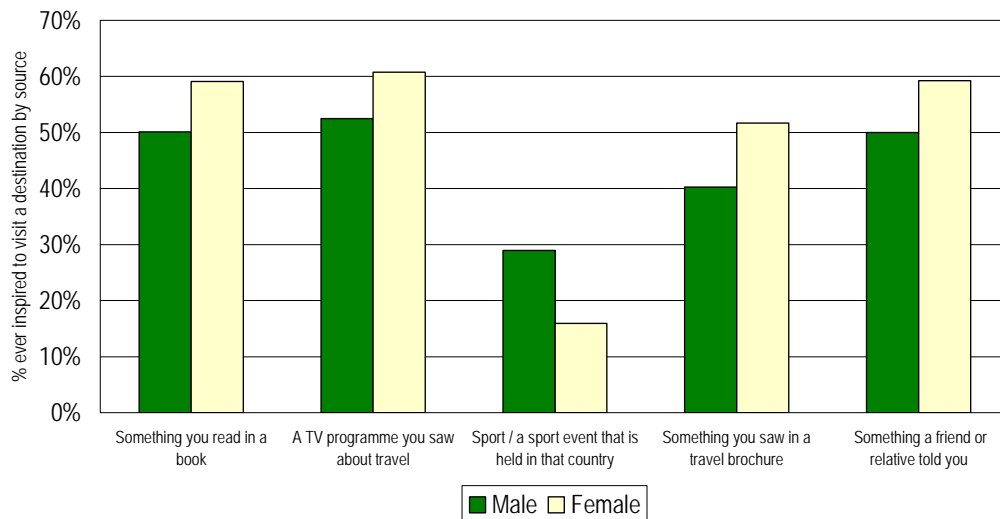
Opinions about the UK



...but destination inspiration can come from different sources

Back in 2007 one of VisitBritain's sponsored questions on the survey looked at the various ways respondents may have been inspired to visit a destination. A multitude of sources were asked about, but the chart below teases out a few that apparently don't influence men and women to the same extent.

Sources of destination inspiration



So, females are more likely to get inspiration to visit a destination by something they read in a book, see on a television programme, travel brochure or have been told by a friend, but for the chaps sport was twice as likely to have inspired a trip to a destination than was the case for females. When examining the different types of activities that inbound visitors undertake during a trip to Britain in earlier editions of *Foresight* we also found some differences with, for example, males three times more likely to watch a football match than females.

Issue of the Month – Coach Travel

Those taking a coach to get to or from their holiday destination, or indeed a coach touring holiday, enjoy a very different experience than was the case a generation or so ago, the 'clapped out charabanc' has been replaced by modern vehicles with reclining seats, air-conditioning, on-board washrooms and catering facilities.

Headline figures

For the most part we will focus on the use of coaches by inbound visitors, but first let us look at some key statistics for both inbound and domestic overnight travel.

We can see that in 2008 nearly 1.5 million inbound visitors used a coach as their mode of travel when departing Britain, having contributed £425m to the economy, with average spend per visit of £286.

Inbound visitors who depart by coach					
Visits (000s)	Nights (m)	Spend (£m)	Nights per visit	Spend per night	Spend per visit
1,485	11.3	£425	7.6	£38	£286

For domestic overnight trips where the main mode of travel was classified as 'organised coach tour' we discover a market in excess of 2.5 million trips in 2008 worth £581m.

Overnight domestic trips by UK residents where the main mode of transport was an organised coach tour					
Visits (000s)	Nights (m)	Spend (£m)	Nights per visit	Spend per night	Spend per visit
2,518	8.8	£581	3.5	£66	£231

The Confederation of Passenger Transport (CPT) have published 'Britain's Coaches: Partnership and Passengers' which provides a raft of figures that help to demonstrate the contribution that the coach sector plays in the economy. Taking all coach travel together there were some 273 million journeys made during 2007, accounting for a £2.35bn contribution to the economy.

According to the CPT 400,000 people travelled to York by coach in 2006, 30% of all visitors to Oxford arrived by coach and more than half a million of Cornwall's visitors opted for this form of transport. Day trips are particularly important to the coach sector, and using both UKTS and UK Day Visits Survey figures the CPT estimate that 266 million day trips were undertaken by coach in 2007 with each passenger spending on average £50 per trip.

The coach industry utilised 20,000 vehicles in 2007 that travelled an estimated 1.3bn kilometres (equivalent to 1,700 return trips to the moon) and directly supported no fewer than 50,000 jobs.

Green credentials

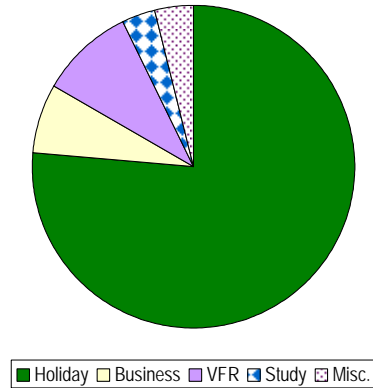
When looking at emissions per passenger the Confederation of Passenger Transport estimate that a coach generates one-sixth of the carbon dioxide emissions of air travel, ½ that of rail travel and ¼ of car travel. What this means is that by choosing to travel from London to Newquay by coach rather than car saves the amount of CO₂ emissions generated by running a refrigerator for more than four months.

Focus on inbound

Looking in detail at the characteristics of inbound visitors who departed the UK by coach helps shed light on this market (all figures are taken from the International Passenger Survey¹ and relate to provisional 2008 data).

Starting with the purpose mix it is plain to see from the pie chart that overwhelmingly visits are for a holiday (77%), with less than one-in-ten trips using a coach being for either business purposes or to visit friends and relatives. It is worth noting that nearly 50,000 trips were for 'study' purposes, although this represents just 3% of coach based trips.

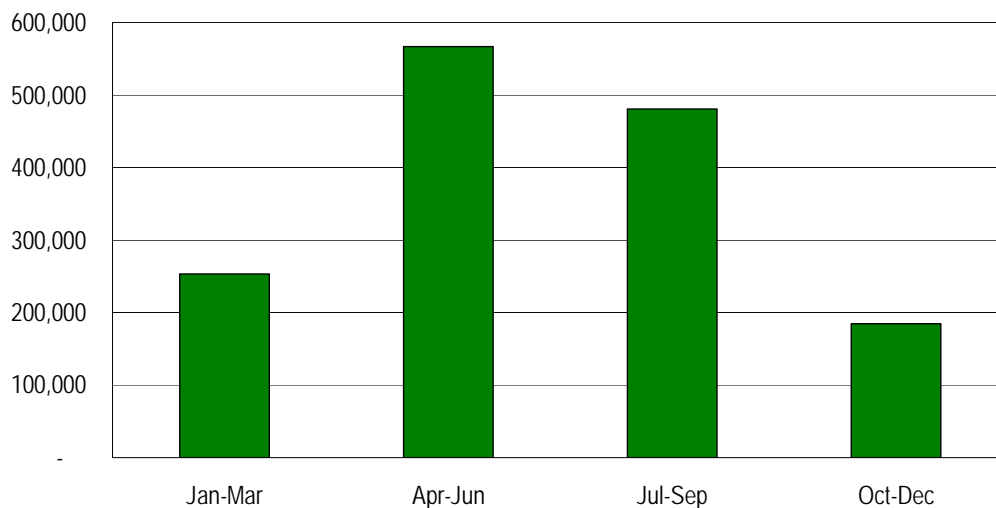
Visits by journey purpose



A trait that differentiates those using a coach with other inbound visitors is the tendency not to be travelling independently, or in other words being on an 'organised' trip. Nearly 60% of those using a coach in 2008 were on a 'non-independent' trip, whereas for the inbound market in total the proportion is just 7%.

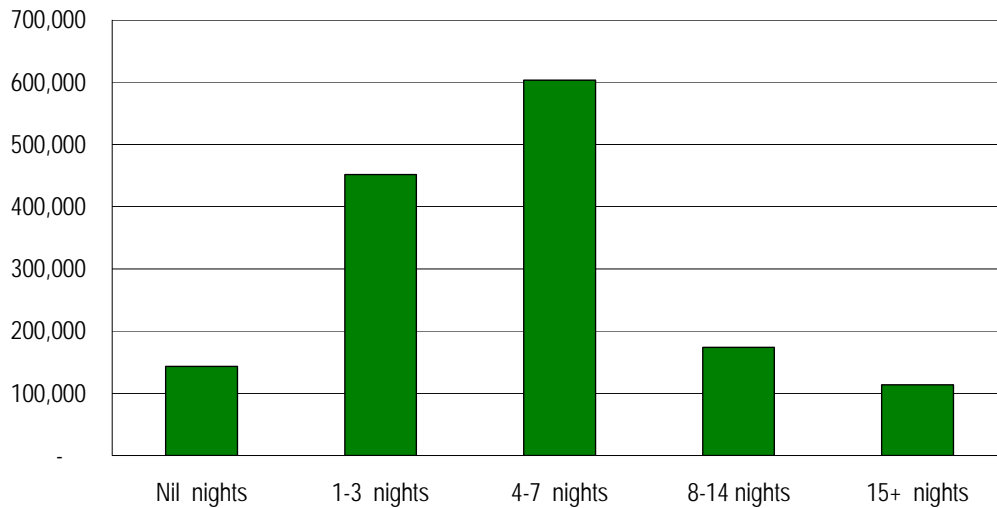
Given the tendency for trips to be for a holiday we should not be too surprised to discover that seven-in-ten trips take place between April and September; we can see from the chart that it was the April to June period that proved most popular for using a coach in 2008, with more than 560,000 trips, by contrast less than 190,000 trips in the October to December period were by coach.

Visits by quarter



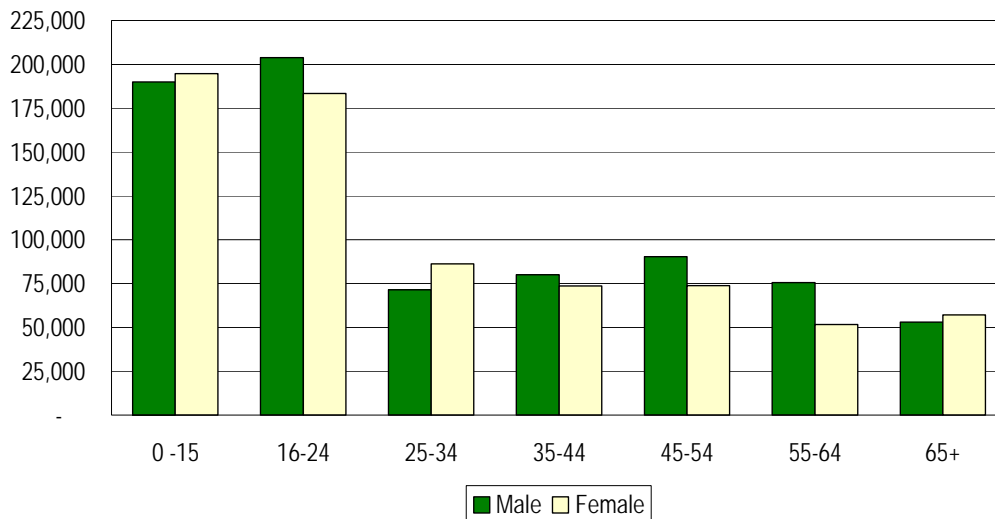
The most common duration of stay for this market was 4-7 nights, with 1-3 night stays not far behind. It is apparent from the following chart that less than a fifth of coach trips involve stays of eight or more nights.

Visits by duration of stay



It is very definitely the younger traveller who chooses to travel by coach, with more than half of inbound visitors using a coach in 2008 being aged 24 or younger. We can discern from the chart that there is very little difference between the numbers when it comes to gender.

Visits by age and sex



Finally looking at the top markets for travel to/from the UK by coach we can see from the table that France is a clear leader, accounting for 445,000 trips in 2008, or 30% of all coach trips. All of the top five markets are European, but we can see that a number of long-haul markets make it into the top ten, with nearly 70,000 Indian residents departing the UK by coach.

Among the explanations for why long-haul visitors are using a coach to depart Britain one stands out; many will be on a touring holiday that includes Britain and other destinations in Europe, for example Ireland or France.

Top coach markets in 2008	
Market	Visits (000s)
France	445
Germany	233
Netherlands	154
Poland	134
Belgium	70
India	67
Czech Republic	63
USA	50
Australia	50
Canada	24

The domestic scene

Recently agreed initiatives between VisitBritain, VisitEngland and the Coach Tourism Council look set to benefit the sector. The coach industry will have a stronger voice in the development of domestic tourism through closer links with VisitEngland, particularly through policy making and marketing functions. In particular the coach industry will have prominence at the 2010 Best of Britain and Ireland event to be held at Olympia next March.

Meanwhile the Coach Tourism Council are reporting promising figures for the current year, indeed in the early months of 2009 bookings were up by as much as 20% for some of the CTC's 150 members, perhaps reflecting consumers keenness on finding value for money ways of taking a break during the current challenging economic times.

There can be little doubt that the coach remains a very popular way of exploring a destination, be this by inbound visitors looking to discover many parts of Britain on a single trip, Britons taking a domestic holiday, or simply those having a day out at the seaside, theme park or stately home.

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Issue of the Month

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