

FORESIGHT

Issue 70 August 2009



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' provides an assessment of current and future global tourism trends, with 'Issue of the Month' exploring the extent to which different stimuli influence the countries that people choose to visit.

Market Focus – Global tourism trends

We are now into the busiest period of the year for global international tourism, with the months of July and August typically accounting for between one-fifth and one-quarter of all international trips taken annually. Despite glimmers of hope that the global economic situation has now stabilised and (comparative) optimistic sentiment relating to recovery in the months ahead, 2009 will be a year during which we witness a reduction in global tourism.

The United Nations World Tourism Organisation (UNWTO) forecast that global tourism will decline by between -6% and -4% during 2009, with preliminary data for the first four months of this year painting a somewhat gloomier picture with an 8.4% decline in international arrivals. According to the UNWTO arrivals to Europe will decline by between -8% and -5%; the only region of the world forecast to see any growth this year is Africa. VisitBritain forecasts that the number of visitors coming to the UK during 2009 could be as much as 5% down on 2008.

The UK remains a top global destination

2008 Rank	Destination	Arrivals (m)	2007 Rank	2006 Rank	2005 Rank	2004 Rank	2003 Rank	2002 Rank
1	France	79.3	1	1	1	1	1	1
2	USA	58.0	3	3	3	3	3	3
3	Spain	57.3	2	2	2	2	2	2
4	China	53.0	4	4	4	4	5	5
5	Italy	42.7	5	5	5	5	4	4
6	UK	30.2	6	6	6	6	6	6
7	Ukraine	25.4	8	n/a	n/a	n/a	n/a	n/a
8	Turkey	25.0	9	n/a	n/a	n/a	n/a	n/a
9	Germany	24.9	7	7	8	9	9	10
10	Mexico	22.6	10	8	7	8	8	8

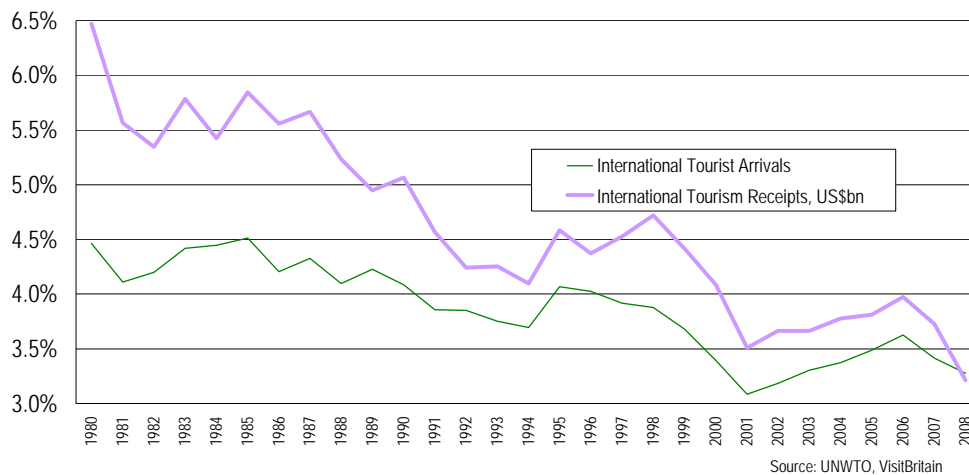
The UK is a major player in international tourism terms, holding 6th place in terms of arrivals, accounting for 3.3% of all international arrivals (3.4% in 2007). Note that the UK figure in the above table is for 'staying visits' and excludes 'day trip' visits in order to be consistent with data for other countries. The US has moved into second place having ousted Spain which falls to third, otherwise there were no changes among the top six destinations in 2008. Both Ukraine and Turkey moved up one place last year, pushing Germany down into 9th spot with Mexico continuing to hold tenth place.

International Tourist Receipts

2008 Rank	Destination	US\$bn	2007 Rank	2006 Rank	2005 Rank	2004 Rank	2003 Rank	2002 Rank
1	USA	110.1	1	1	1	1	1	1
2	Spain	61.6	2	2	2	2	2	2
3	France	55.6	3	3	3	3	3	3
4	Italy	45.7	4	4	4	4	4	4
5	China	40.8	5	5	6	7	7	5
6	Germany	40.0	7	7	7	6	5	6
7	UK	36.0	6	6	5	5	6	7
8	Australia	24.7	8	8	10	10	n/a	n/a
9	Turkey	22.0	10	9	8	8	9	8
10	Austria	21.8	9	10	9	9	8	9

When it comes to which destinations are the highest earners from inbound tourism the UK has slipped one place to seventh with Germany having stolen sixth position, and although this in part reflects exchange rate movements, measured in local currencies Germany saw faster spend growth than did the UK. There were no changes among the top five; Australia continued to hold eighth spot with Turkey and Austria trading places at the foot of the table. The following chart shows the UK's share of arrivals and receipts, revealing a steady decline with the exception of the period from 2003 to 2006 when increased visits from the EU Accession nations and a rebound from the events of 2001 helped to bolster the UK's market share.

The UK's global market share



The UK remains one of the world's top source markets for international tourism expenditure, coming comfortably in third spot in 2008 according to the UNWTO. Despite a prolonged period of decline Japan remains in the top ten, but is now some way behind China. Exchange rate fluctuations can influence the league table, but it is clear that with the exception of Russia and China international tourism is heavily reliant on travel by those living in 'developed' economies.

2008 Rank	Source Market	US\$bn
1	Germany	91.2
2	USA	79.7
3	UK	68.5
4	France	43.1
5	China	36.2
6	Italy	30.8
7	Japan	27.9
8	Canada	26.9
9	Russian Federation	24.9
10	Netherlands	21.7

The downturn in global tourism is impacting on the majority of destinations as is clear from the following chart which pulls together data from a number of sources including UNWTO, Tourmis and individual National Tourism Organisations.

Current global tourism destination trends



The airline industry continues to be one of the hardest hit sectors, most notably 'legacy' carriers that have traditionally relied on business class travel for a significant share of their income. Figures from IATA (International Air Transport Association) indicate that the decline in passenger traffic may now be stabilising; volume was 9.3% down on a year earlier in May but only 7.2% down during June, however, business class travel remains sharply lower than in 2008 with a 23.6% decline in May. The sharpest declines in air travel continue to be in the Asia Pacific region, with the Middle East still witnessing growth in traffic.

The Future

According to Tourism Economics global outbound tourism could decline by as much as 6% in 2009, with only very modest growth in 2010. This means that it will be 2011 before global tourism gets back to where it was in 2008. However, thereafter growth is expected to resume, and by 2020 the number of international tourism trips will be more than a third higher than was the case in 2008. The UK's market share of international travel is forecast to increase slightly according to Tourism Economics, from 3.3% currently to 3.7% in 2020, however this is largely dependent on the recent strong growth in the UK's market share of outbound travel from 'Emerging Europe' persisting well into the future, which certainly has not been the case in 2009.

While long-haul travel has entered the repertoire of many international travellers one simple truth remains; overwhelmingly international travel is intra rather than inter-continental. Currently 28% of all trips are estimated to have both their origin and destination in Western Europe, with the share of global trips that are entirely within Northeast Asia being 16%.

From the table we can see the league table for which pairs of origin and destination are forecast to see the largest absolute growth in travel between 2008 and 2020.

Growth in visits 2008 to 2020		
Rank	From	To
1	Northeast Asia	Northeast Asia
2	Western Europe	Western Europe
3	Middle East	Middle East
4	Southeast Asia	Southeast Asia
5	Emerging Europe	Western Europe
6	South America	South America
7	Northeast Asia	Southeast Asia
8	Western Europe	North Africa
9	Emerging Europe	Emerging Europe
10	Sub-Saharan Africa	Sub-Saharan Africa

Seven out of the top ten are intra-regional flows, with two of the remainder being intra-continental. In eighth spot we find visits from Western Europe to North Africa, but even here the average flight time is likely to be no more than three or four hours.

Again looking ahead to 2020 we find that the top outbound markets, measured in volume terms, are similar to today. The table shows the top ten markets, though island states such as Hong Kong and Macau have been excluded due to the very high volume of short cross-border trips.

Top outbound markets in 2020			
1	GERMANY	6	ITALY
2	UNITED KINGDOM	7	NETHERLANDS
3	UNITED STATES	8	CANADA
4	FRANCE	9	SPAIN
5	CHINA	10	JAPAN

Despite a fairly significant hiccup during 2009 brought on by the global economic crisis we can look forward to international tourism continuing to grow strongly during the coming decade, with the UK expected to play a major role. It is important to note that one of the strongest growing markets for inbound tourism to the UK in the next decade is forecast to be the USA; despite being in the doldrums for the past few years Americans remain some of the wealthiest citizens and thanks to the Western Hemisphere Travel Initiative growing numbers are passport owners.

Emerging source markets will grow in importance for the UK, with the 'BRIC' nations (Brazil, Russia, India and China) forecast to account for an additional one million visits per annum to Britain by 2020 compared to today, reinforcing the message that Britain needs to be flexible in deploying its marketing resources between both established and emerging source markets.

Issue of the Month – Destination inspiration

Last month's discussion about the different characteristics of male and female inbound visitors touched briefly on the issue of what sources had inspired or influenced visits to destinations. This month we delve a little deeper into the results of a VisitBritain sponsored question included in Wave 2 of the 2007 Anholt-GMI (as it then was) Nations Brand Index survey (an on-line panel survey of up to 1,000 respondents in 35 countries). The following chart shows the headline results along with the question that was posed to respondents.

What inspires destination choice?



From the above chart it is apparent that there was considerable variation in the extent to which each source had inspired a trip, ranging from 57% of respondents who had got inspiration from a television programme about travel through to just 14% who'd been inspired to visit another country thanks to a celebrity or famous person from that country.

It is not at all surprising to see 'something a friend or relative told you' near the top of the leader board, with 55% of respondents saying this had inspired a visit, but it is fascinating to note that just ahead of this was 'something you read in a book' with 57%, although this could reflect both the impact of material read in travel guidebooks as well as other tomes.

Material seen on the Internet and things that had been learned while in education also performs strongly in inspiring visits. Not influencing as many, but still a source of inspiration at some time for nearly one-in-four respondents was 'Music / bands that you like from that country', but it seems that movies seen at the cinema or on television have greater power to inspire holidays, with 39% of respondents saying that they'd been influenced by this source at some point in the past.

The importance of ensuring that visitors have a memorable trip for all the right reasons is clear, with nearly half (46%) saying that at some point in the past they had been inspired to visit somewhere thanks to a previous trip to the destination. What is written about a destination in a travel blog is clearly important, with more than one-in-five respondents having been influenced or inspired to visit a country by such material,

Age Differences

We can explore the results of the survey in terms of many different socio-demographic characteristics, and the chart overleaf deals with the proportion of respondents who had got inspiration from each of the different sources broken down by age.

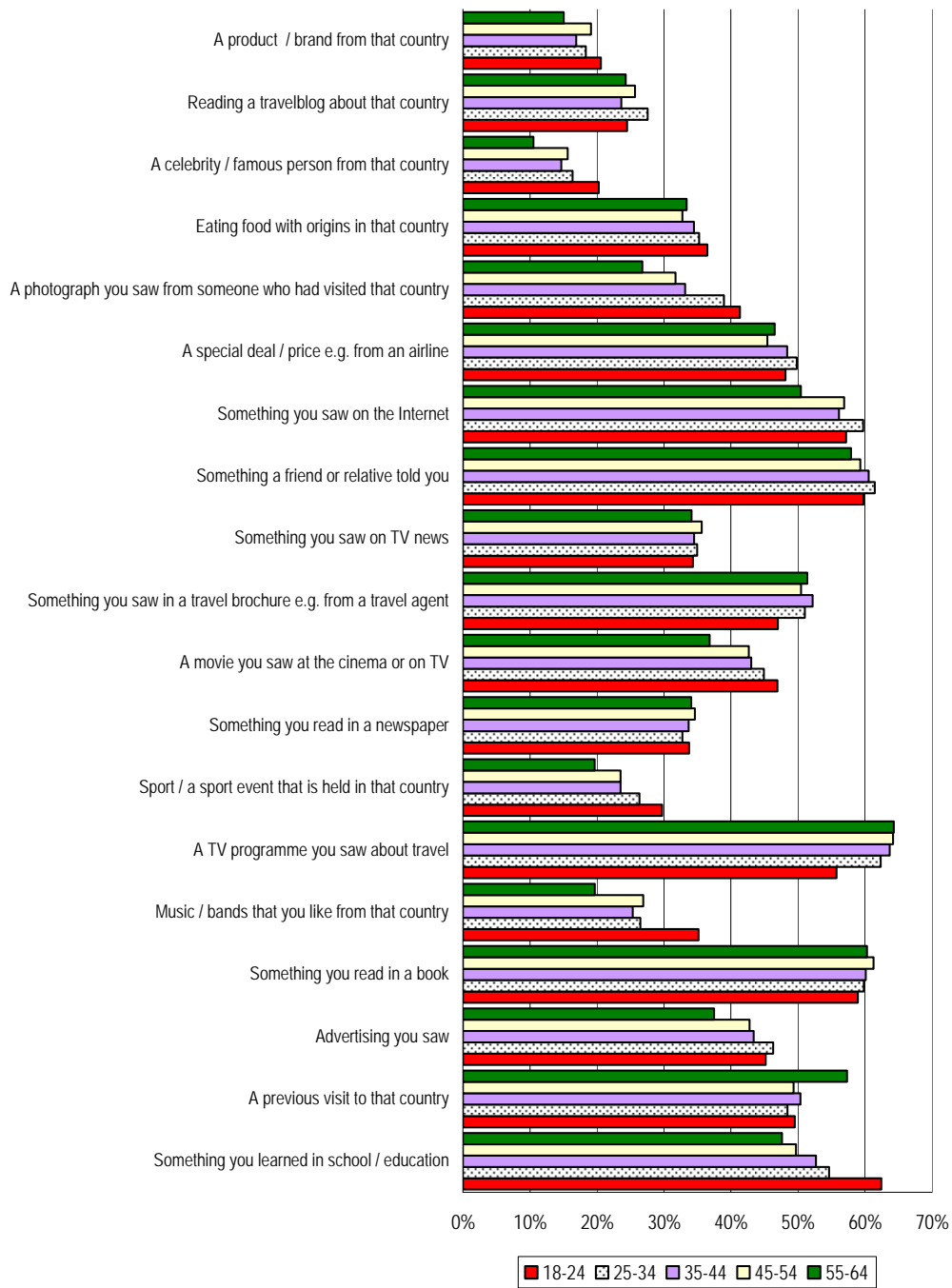
We can see that 'something you learned in school / education' has far more potency to inspire trips to destinations for the 18-24 age group than is the case for older cohorts. Continuing to look at the youth segment we discover that they are more prone to get inspiration from music and bands that they like than are older respondents (35% for the 18-24s, compared with 20% for the 55-64s).

There is a clear correlation between age and likelihood to have got inspiration for a trip from 'sport or a sport event that is held in that country', ranging from 30% for the youngest group through to 20% for the oldest group. The only occasion where the oldest group registers the highest percentage for an inspiration source is 'a previous visit to that country', but this is to be expected as they will have had more opportunity to make repeat visits to destinations.

Differences by country

On the final page is a table that indicates for each of the 35 countries covered the percentage of respondents who had ever been influenced or inspired to visit a country by each source. Although at first glance containing rather a large amount of information the table is in reality fairly easy to interpret, and some of the main highlights are annotated. Note that due to the majority of respondents from Sweden being coded as responding 'None of these' percentages for this market are shown, but the market is not included in the commentary.

Age



	Argentina	Australia	Belgium	Brazil	Canada	China	Czech Republic	Denmark	Egypt	Estonia	France	Germany	Hungary	India	Indonesia	Ireland	Italy	Japan
Something you learned in school / education	57%	46%	50%	61%	52%	63%	57%	38%	62%	54%	49%	27%	53%	67%	73%	60%	47%	30%
A previous visit to that country	46%	44%	60%	28%	48%	26%	61%	69%	56%	50%	52%	47%	55%	40%	48%	79%	39%	27%
Advertising you saw	49%	42%	36%	49%	45%	49%	29%	27%	59%	30%	31%	20%	40%	56%	66%	50%	31%	19%
Something you read in a book	57%	51%	53%	64%	55%	68%	59%	42%	65%	62%	50%	46%	61%	67%	76%	61%	51%	51%
Music / bands that you like from that country	36%	20%	19%	43%	23%	35%	23%	17%	26%	28%	23%	21%	23%	32%	39%	19%	18%	20%
A TV programme you saw about travel	56%	61%	63%	56%	54%	66%	57%	54%	64%	60%	56%	46%	47%	60%	73%	65%	43%	52%
Sport / a sport event that is held in that country	29%	27%	15%	33%	20%	38%	19%	16%	38%	23%	16%	11%	17%	39%	45%	27%	14%	12%
Something you read in a newspaper	33%	26%	26%	35%	31%	28%	32%	33%	40%	32%	21%	31%	40%	49%	60%	36%	28%	20%
A movie you saw at the cinema or on TV	47%	37%	33%	60%	40%	54%	36%	26%	54%	35%	32%	24%	46%	52%	65%	42%	34%	36%
Something you saw in a travel brochure e.g. from a travel agent	51%	49%	58%	52%	48%	35%	48%	56%	50%	42%	49%	42%	51%	48%	61%	55%	41%	42%
Something you saw on TV news	28%	27%	26%	38%	29%	48%	21%	28%	44%	38%	27%	30%	32%	48%	64%	31%	18%	25%
Something a friend or relative told you	60%	57%	62%	60%	61%	43%	61%	63%	68%	67%	54%	49%	62%	63%	65%	72%	42%	34%
Something you saw on the Internet	60%	39%	55%	67%	43%	62%	63%	57%	64%	64%	46%	43%	66%	59%	74%	60%	49%	41%
A special deal / price e.g. from an airline	51%	52%	54%	57%	53%	26%	42%	50%	47%	51%	47%	34%	42%	41%	51%	70%	41%	21%
A photograph you saw from someone who had visited that country	40%	33%	29%	49%	37%	24%	51%	23%	44%	38%	22%	19%	40%	48%	55%	31%	21%	10%
Eating food with origins in that country	39%	34%	39%	44%	37%	37%	21%	23%	33%	29%	31%	19%	36%	38%	47%	42%	24%	18%
A celebrity / famous person from that country	14%	10%	8%	20%	11%	28%	11%	7%	30%	21%	6%	9%	19%	28%	28%	7%	7%	12%
Reading a travel blog about that country	16%	18%	15%	19%	19%	31%	35%	22%	42%	39%	11%	10%	47%	42%	49%	27%	15%	19%
A product / brand from that country	16%	10%	11%	25%	11%	33%	15%	8%	32%	24%	9%	9%	11%	32%	37%	11%	8%	15%

	Korea	Malaysia	Mexico	Netherlands	New Zealand	Norway	Poland	Portugal	Russia	Singapore	South Africa	Spain	Sweden	Switzerland	Turkey	UK	USA
Something you learned in school / education	44%	67%	60%	35%	58%	39%	53%	58%	50%	54%	56%	43%	12%	37%	65%	44%	45%
A previous visit to that country	27%	53%	39%	65%	54%	58%	52%	46%	44%	61%	52%	49%	6%	62%	35%	74%	35%
Advertising you saw	40%	72%	69%	27%	53%	38%	31%	48%	29%	63%	61%	44%	6%	31%	57%	35%	34%
Something you read in a book	52%	75%	71%	43%	58%	41%	60%	55%	68%	61%	69%	55%	8%	53%	70%	48%	43%
Music / bands that you like from that country	19%	32%	43%	17%	26%	31%	30%	20%	31%	20%	33%	22%	6%	24%	26%	12%	16%
A TV programme you saw about travel	56%	75%	64%	57%	68%	58%	60%	63%	72%	70%	72%	51%	7%	59%	69%	58%	46%
Sport / a sport event that is held in that country	21%	40%	38%	12%	33%	18%	24%	21%	21%	23%	37%	20%	6%	19%	33%	16%	11%
Something you read in a newspaper	28%	64%	36%	23%	32%	26%	31%	32%	28%	53%	34%	27%	5%	36%	54%	28%	18%
A movie you saw at the cinema or on TV	40%	59%	62%	22%	40%	36%	40%	49%	44%	46%	53%	37%	7%	33%	66%	30%	32%
Something you saw in a travel brochure e.g. from a travel agent	29%	70%	63%	41%	54%	44%	40%	54%	41%	60%	62%	50%	6%	56%	46%	45%	33%
Something you saw on TV news	31%	56%	44%	25%	37%	30%	20%	38%	38%	42%	40%	30%	7%	28%	57%	23%	24%
Something a friend or relative told you	36%	72%	60%	57%	67%	47%	61%	58%	62%	63%	68%	56%	7%	63%	67%	58%	49%
Something you saw on the Internet	50%	70%	67%	47%	50%	51%	57%	60%	62%	54%	66%	52%	7%	55%	71%	40%	31%
A special deal / price e.g. from an airline	27%	65%	53%	44%	61%	46%	39%	43%	37%	62%	56%	48%	5%	49%	41%	45%	37%
A photograph you saw from someone who had visited that country	26%	56%	44%	23%	37%	18%	43%	32%	36%	42%	47%	29%	6%	30%	38%	26%	29%
Eating food with origins in that country	21%	43%	31%	37%	43%	39%	32%	32%	33%	44%	42%	25%	5%	26%	31%	35%	28%
A celebrity / famous person from that country	13%	29%	34%	6%	13%	11%	16%	10%	22%	20%	18%	13%	4%	10%	21%	5%	9%
Reading a travel blog about that country	31%	50%	29%	36%	24%	12%	12%	17%	29%	37%	31%	19%	4%	13%	34%	18%	13%
A product / brand from that country	22%	40%	22%	7%	15%	16%	19%	12%	28%	26%	25%	11%	4%	12%	28%	8%	9%

60% Source mentioned by highest % of respondents in this market

14% Source mentioned by lowest % of respondents in this market

73% Market with the highest % of respondents mentioning this source

19% Market with the lowest % of respondents mentioning this source

Key points

- For 22 of the 35 markets 'a celebrity / famous person from this market' is the least mentioned source
- For seven markets 'a product / brand from that country' is the least mentioned source
- For ten markets, including Australia, Japan, Russia, South Africa, 'a TV programme you saw about travel' is the most mentioned source
- For seven markets, including Canada and the USA, 'something a friend or relative told you' is the most mentioned source
- For seven markets, including Argentina and Brazil, 'something you saw on the Internet' is the most mentioned source
- For seven sources Malaysians are the most likely to say they have been influenced by that source, including 'advertising you saw' and 'a product / brand from that country'
- For six sources Indonesians are the most likely to say they have been influenced by it

- For five sources the Japanese are the least likely to say they have been influenced by it, including 'advertising you saw', 'something a friend or relative told you' and 'eating food with origins in that country'
- Chinese and Mexicans were more likely to be influenced by 'something you read in a book' than by other sources
- Brazilians are the most likely to say they have been influenced by 'music / bands that you like from that country', with Brits being the least likely to say this has influenced them
- The Irish were most likely and Americans least likely to say that they had been influenced by 'a special deal / price from an airline'
- The Irish were the most likely to say that 'a previous visit to that country' had influenced them to make a repeat trip – the Chinese were the least likely to have been inspired by previous visits, but this may be reflect a lack of international travel rather than an inert unresponsiveness to the source
- The Turkish were most likely and Dutch least likely to have been inspired by 'a movie you saw at the cinema or on TV'
- Despite the popular perception that for the Japanese a crucial part of a holiday is to take pictures this group of respondents are in fact the least likely to admit to having been inspired to visit a country due to 'a photograph you saw from someone who had visited that country'
- Mexicans are the most likely and Brits the least likely to say that they have been inspired to visit a country due to 'a celebrity / famous person from that country'
- Germans, French and Swiss respondents were less likely to have been influenced by 'reading a travel blog about that country' than were respondents from other countries
- The Dutch were the least likely to admit to having been influenced by 'a product / brand from that country'

A multitude of factors influence the countries that are visited for a holiday, but as we have seen here some, such as TV programmes about travel and material that is read in books, play more of a role than do others, for example the power of celebrity has little impact on destination choice. Later in the year results from VisitBritain sponsored questions in the 2009 Anholt-GfK Nations Brand Index survey will enable us to investigate how international travel vies in importance with other dimensions of modern day living such as spending time with friends and family, careers and home improvements for residents of some twenty countries worldwide.

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