

FORESIGHT

Issue 71 September 2009



FORESIGHT is a monthly commentary on significant issues within the tourism sector. This month we focus on the results of a VisitBritain sponsored question included in the 2008 International Passenger Survey that asked inbound visitors about the activities they undertook during their visit, ranging from eating in restaurants through to reading British newspapers.

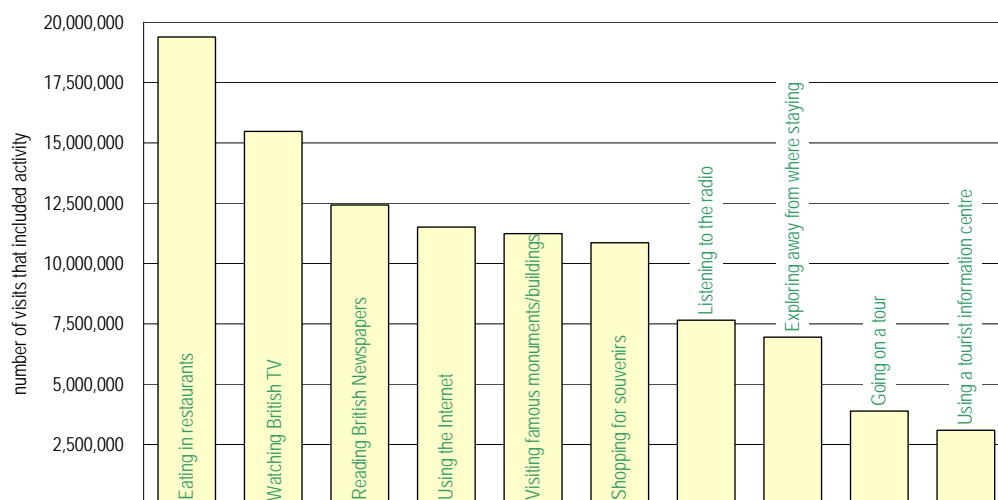
The big picture

Since 2006 VisitBritain has sponsored an 'activities' question on the International Passenger Survey¹ asking inbound visitors about what they get up to while they are in the United Kingdom. Each year a different set of activities have been included, with the results of the 2006 set described in the October 2007 edition of *Foresight* and the 2007 set described in the April 2009 edition.

The following chart shows the number of visitors who undertook each of the activities that was asked about during 2008. We can see that 'eating in restaurants' was the most popular activity, undertaken by nearly 20 million visitors. Not all respondents to the survey answered the activities question, but of those who did 70% said they had eaten in a restaurant.

More than half of respondents said that they had watched British television during their stay, with two-in-five having read British newspapers, used the Internet, visited famous buildings and monuments or shopped for souvenirs. Roughly a quarter had listened to British radio stations or explored places away from where they were staying, and one-in-seven said that they had gone on a tour. While being the activity undertaken by the smallest percentage of respondents, 11% of visitors said that they had used a Tourist Information Centre during their trip to Britain.

Activities undertaken



In more detail

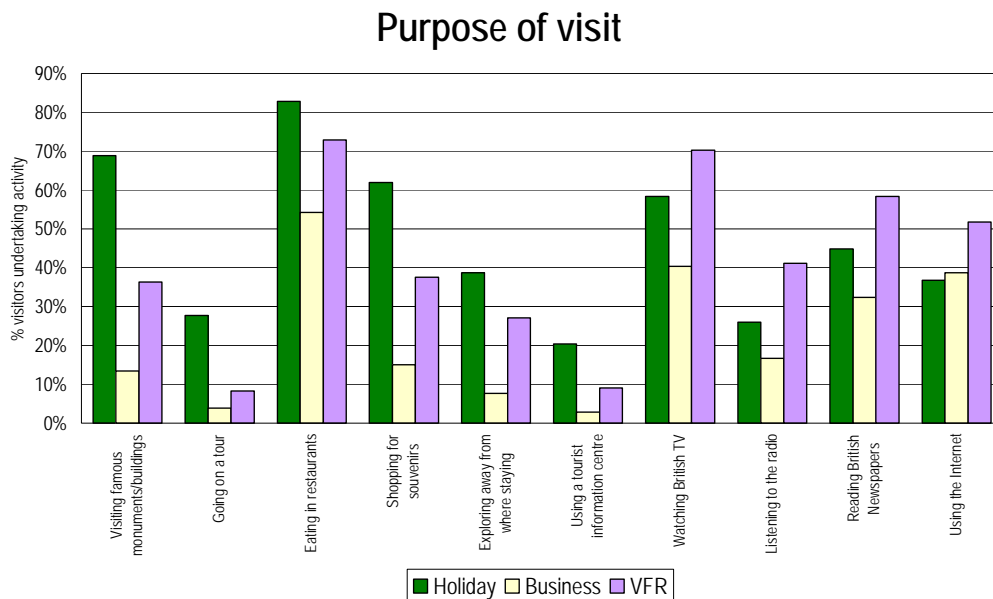
Let us start by looking at the proportion of visitors undertaking each activity that was asked about during 2008 for each of the three main journey purpose categories. For six of the activities holiday visitors were more likely than other visitors to be found undertaking them, whereas for the remaining four activities those in Britain to visit friends or relatives were the most likely to be participants.

Holiday visitors were the most likely to eat in restaurants (83%), but this was also the most popular activity for visitors who were on business (54%) and visiting friends or relatives (73%). Based on findings of many other research projects it is no great surprise that seven-in-ten holiday visitors enjoy visiting famous buildings or monuments during their trip, with heritage one of Britain's chief draw cards.

More than a quarter of holiday visitors go on a tour while 62% shop for souvenirs. There is certainly a lot to explore in Britain and two-in-five holiday visitors acknowledged having 'explored away from where I was staying'. One-in-five holiday visitors made use of a Tourist Information Centre at some point during their trip.

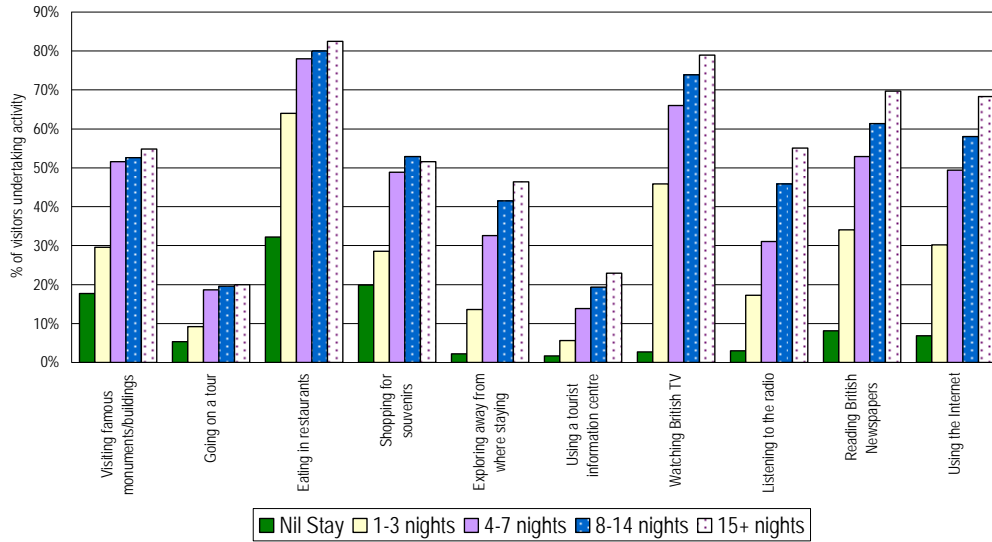
After eating in restaurants the most popular activities for business visitors centred around using different types of media; 40% watched British television, 39% used the Internet, 32% read British newspapers while one-in-six listened to British radio. Although only a minority, one-in-seven business visitors either shopped for souvenirs or visited famous buildings and monuments.

Those who were visiting friends or relatives definitely got to watch British television (70%) and read British newspapers (58%) during their stay, but we need to note that more than a third either visited famous buildings and monuments or shopped for souvenirs. Drilling home the fact that 'VFR' visitors get out and about the survey found that 27% had explored areas away from where they were staying, while one-in-ten had used a Tourist Information Centre.



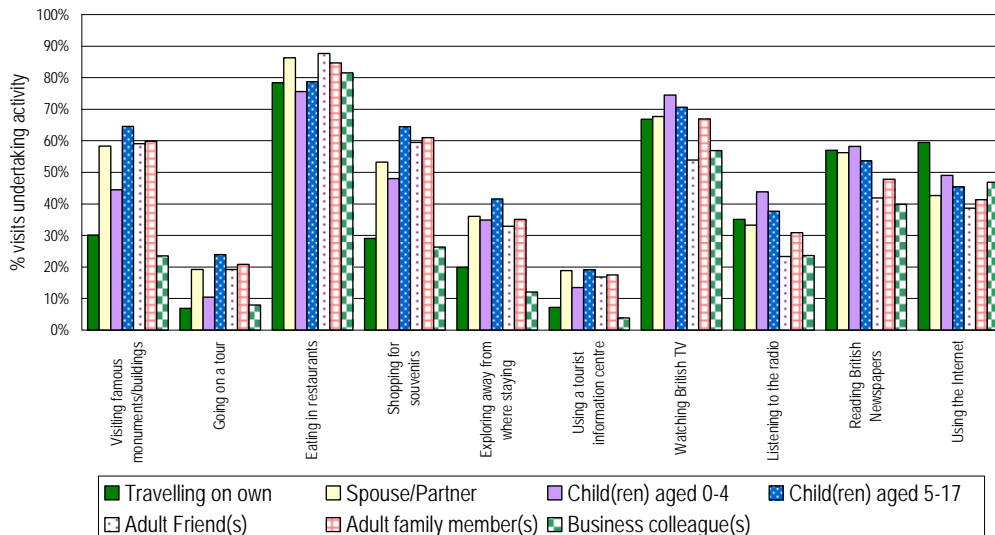
The next chart paints a fairly familiar picture when it comes to the correlation between length of stay and likelihood to participate in activities. In essence, the longer a visitor is in the country the more likely he or she is to participate in activities. Clearly 'Nil Night' visitors don't get much chance to undertake many activities, but nevertheless one-in-three will eat in a restaurant, one-in-five will shop for souvenirs and almost as many visit famous buildings or monuments.

Duration of stay



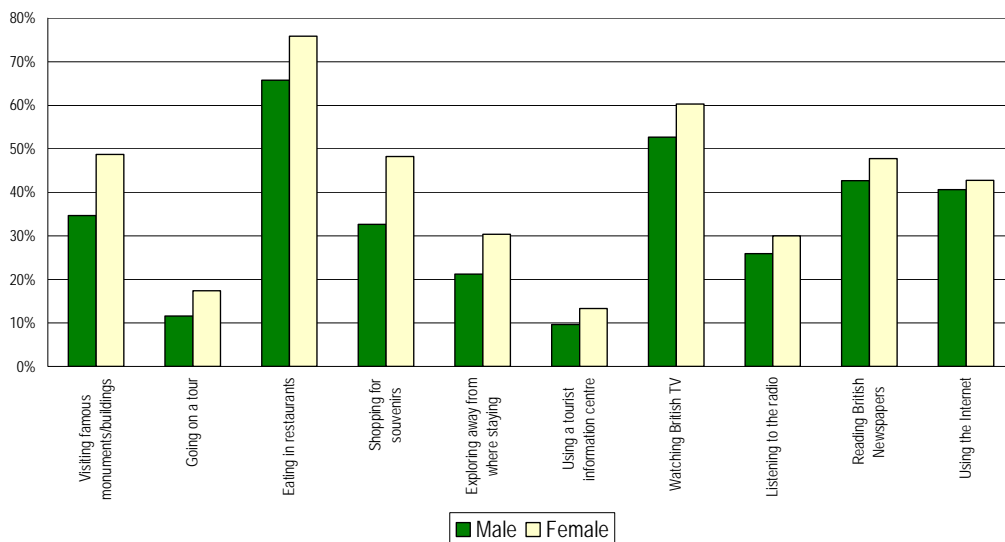
Looking at the mix of travelling companions for those participating in each activity we can see that those travelling on their own were the most likely to use the Internet but along with those travelling with business colleagues were the least likely to use a Tourist Information Centre or explore away from where they were staying. Those travelling with children aged 0-4 were the most likely to watch British television, listen to British radio and read British newspapers but fractionally less likely than others to eat in restaurants.

Travelling companions



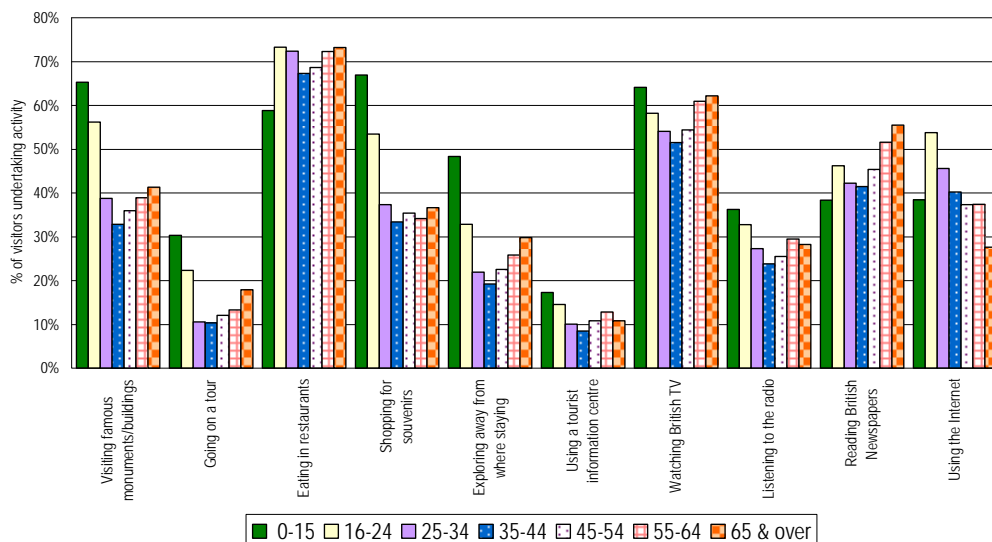
Continuing on a demographic front the following chart shows us that females were more likely than males to participate in each of the activities asked about in 2008, with this being particularly the case when it came to visiting famous buildings or monuments and shopping for souvenirs. We need to be careful in interpreting these results though, as the fact that the majority of business visitors are male and business visitors are less likely to undertake these two activities than are other types of visitors will largely explain the differences we find by gender.

Gender



The patterns that we find once studying the results by age group are more interesting. Those aged 0-15 were the most likely to say they had visited famous buildings or monuments (65%), shopped for souvenirs (67%), seen British television (64%), explored away from where they were staying (48%) and go on a tour (30%). The over 65's were the most likely (56%) to have read British newspapers. For many activities the 35-44 group had a lower tendency than others to participate, but once again this finding may be driven by purpose of visit differences.

Age of visitors



Markets

The table reveals for each activity which visitors (in terms of country of residence) were the most or least likely to undertake it.

Argentineans were the most likely to visit famous buildings/monuments and to use Tourist Information Centres, while their South American neighbours from Brazil were the most likely to eat in restaurants.

Most and least likely to undertake activity		
Activity	Most likely	Least Likely
Visiting famous monuments/buildings	Argentina	Irish Republic
Going on a tour	Mexico	Luxembourg
Eating in restaurants	Brazil	Czech Republic
Shopping for souvenirs	Malaysia	Irish Republic
Exploring away from where staying	Australia	Hungary
Using a tourist information centre	Argentina	Luxembourg
Watching British TV	New Zealand	Luxembourg
Listening to the radio	Thailand	Mexico
Reading British Newspapers	New Zealand	Czech Republic
Using the Internet	China	Irish Republic

Visitors from Mexico were the most likely to go on a tour while those visiting from New Zealand topped the leader board when it comes to watching British television and reading British newspapers. A spirit of adventure helps visitors from Australia to be the most likely to explore away from where they were staying, while visitors from Malaysia were the most likely to shop for souvenirs. It is interesting to observe that visitors from China seem to relish the opportunity of using the Internet while they are in Britain.

No doubt allied to the fact that business is the main motivation for one-third of visits from Luxembourg visitors from this market are the least likely to go on a tour or use a Tourist Information Centre. Visitors from the Czech Republic are the least likely to eat in restaurants or watch British television while those from Hungary are the least likely to explore away from where they are staying. Finally it is visitors from Ireland that are less likely than others to shop for souvenirs, use the Internet or visit famous buildings and monuments.

Over the next few months VisitBritain will be incorporating the findings of the 2008 activities question into our Market and Trade Profile series, thereby providing a detailed analysis of what visitors from each individual market get up to during a visit to Britain.

Combinations

Clearly visitors to Britain will undertake a mix of different activities during their trip and the table overleaf explores the propensity to combined activities that were asked about during 2008. For each activity the table 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. The table needs to be read across the rows rather than down the columns. So, what are some of the most interesting findings?

- For each 100 visitors who visit a famous building or monument 30 went on a tour, 64 watched British television and 67 shopped for souvenirs
- For every 100 going on a tour only 32 listened to British radio but 86 visited famous buildings or monuments and 55 explored places away from where they were staying

- Out of 100 visitors who shopped for souvenirs 48 also used the Internet and 86 ate in restaurants
- For every 100 visitors exploring away from where they stayed 77 visited famous monuments or buildings and 60 read British newspapers
- Among 100 visitors who used a Tourist Information Centre 42 went on a tour and 43 listened to British radio
- For every 100 visitors who read British newspapers 79 watched British television and 34 explored places away from where they were staying

Mix of activities undertaken during visit: read across each row to see for each 100 who undertake activity 'a' the number who also undertake activity 'b', 'c' etc

	Visiting famous monuments/buildings	Going on a tour	Eating in restaurants	Shopping for souvenirs	Exploring away from where staying	Using a tourist information centre	Watching British TV	Listening to the radio	Reading British Newspapers	Using the Internet
Visiting famous monuments/buildings	100	30	87	67	47	23	64	32	53	48
Going on a tour	86	100	85	76	55	34	65	32	52	47
Eating in restaurants	50	17	100	48	31	15	65	32	54	49
Shopping for souvenirs	69	27	86	100	43	22	66	34	53	48
Exploring away from where staying	77	31	88	68	100	29	71	41	60	56
Using a tourist information centre	85	42	91	77	65	100	71	43	64	58
Watching British TV	47	16	82	46	32	14	100	42	63	55
Listening to the radio	46	16	81	48	38	18	84	100	73	63
Reading British Newspapers	48	16	84	46	34	16	79	45	100	60
Using the Internet	47	16	83	46	34	15	74	42	65	100

Looking forward

During 2009 VisitBritain is again sponsoring an activities question on the International Passenger Survey. This year we are digging a little deeper into some of the types of activity that have been asked about in earlier years in order to better understand the results. We will be asking about individual heritage and cultural activities so that we know who visits the theatre, religious buildings, castles, historic houses, museums or galleries as separate categories. Other activities include visiting gardens, the coast, countryside and villages. Finally we will be finding out which inbound visitors go to live music events. Results will be available in summer 2010.

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