

FORESIGHT is a monthly commentary on significant issues within the inbound 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' profiles inbound visitors to Britain who stay for between 4 and 7 nights, looking at trends and visit characteristics. 'Issue of the Month' considers the role that the BBC plays in promoting all things British, including what the nation offers to the inbound visitor.

Market Focus – inbound visitors to Britain staying for between 4 and 7 nights

Occupying the middle ground between short-stay and long-stay visitors are those overseas residents who opt to spend between four and seven nights in Britain.

	4-7 nights	All visits	Share (%)
Visits (000s)	9,326	31,888	29%
Nights (000s)	48,796	245,775	20%
Spend (£m)	4,792	16,323	29%
Average length of stay (days)	5.2	7.7	
Average spend per visit (£)	£514	£511	
Average spend per night (£)	£98	£98	

The above table, based on data taken from the 2008 International Passenger Survey¹, reveals that this group accounted for 29% of all visits and total spending in 2008; that's equivalent to some 9.3 million visits and £4.8bn of spending.

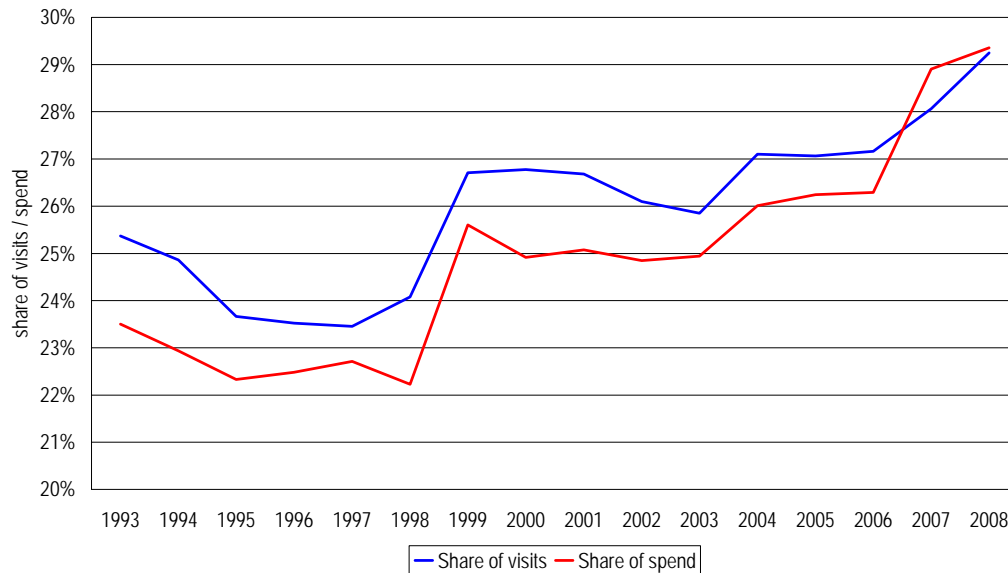
On average a 4-7 night visitor spends £514 during their stay, very close to the average for all visitors, but a below average length of stay is counterbalanced by an above average spend per night of just under £100.

Trends

In the period from 2003 to 2008 the share of both visits and spend that had a trip duration of 4-7 nights has seen a steady increase. Looking back to the 1990s we discover that for a while 4-7 night stays were losing ground to shorter and longer stay trips, but that this trend was sharply reversed in the final years of the decade.

Although data currently only exists for the first nine months of 2009, these provisional estimates indicate that the number of 4-7 night visits was 4% down on the same period of 2008, definitely outperforming the overall market trend, which was for a near 9% decline in visits.

The growing importance of 4-7 night trips



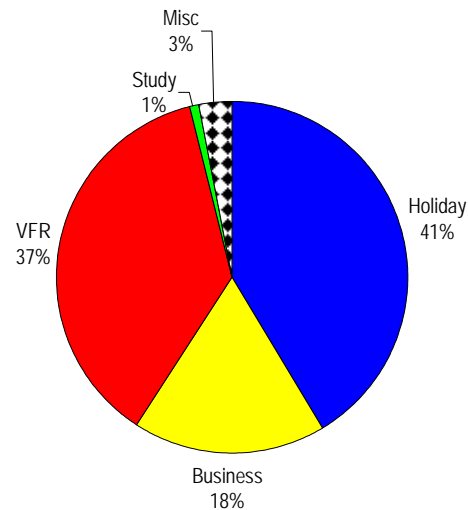
Trip characteristics

From the pie chart we can see that roughly equal proportions of visits that last for between 4 and 7 nights have 'holiday' or a visit to friends and relatives as their primary driver, while less than one-in-five trips of this duration are business related.

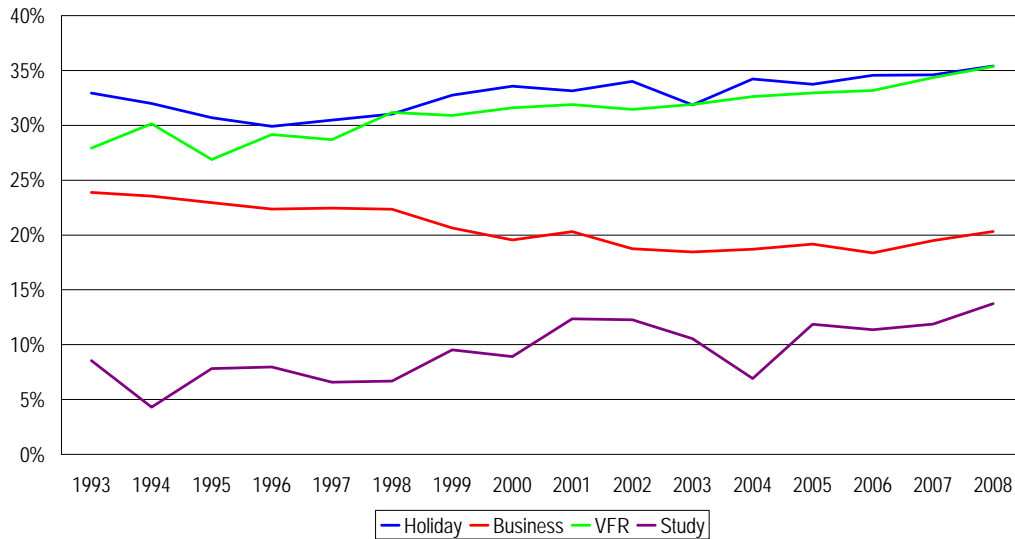
The second chart highlights the proportion of visits for each of the main journey purpose categories that last for 4-7 nights over the past 15 years.

Changes are subtle rather than dramatic, with Holiday, VFR and Study 4-7 night trips gradually becoming more important, while a dwindling proportion of business trips are of this duration.

Journey purpose of 4-7 night stays



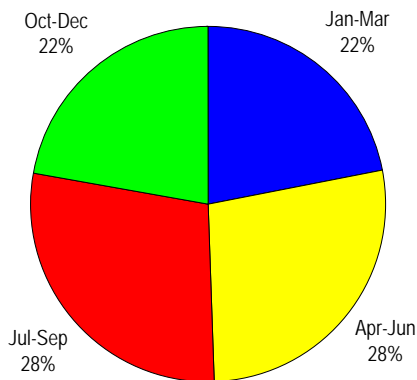
Relative importance of 4-7 night visits within each type of journey purpose



There is a slight bias, as can be seen from the pie chart below, for trips lasting 4-7 nights to take place during the warmer months of the year, with 56% of such trips happening between April and September.

From the following table we can see that a greater proportion of 4-7 night trips are by females than males (58% versus 42%) with this especially true for those aged between 35 and 54.

Seasonal spread



Age and gender of 4-7 night visits

	Male	Female
0 - 15	3%	2%
16-24	7%	6%
25-34	10%	13%
35-44	8%	15%
45-54	7%	12%
55-64	5%	7%
65+	3%	3%

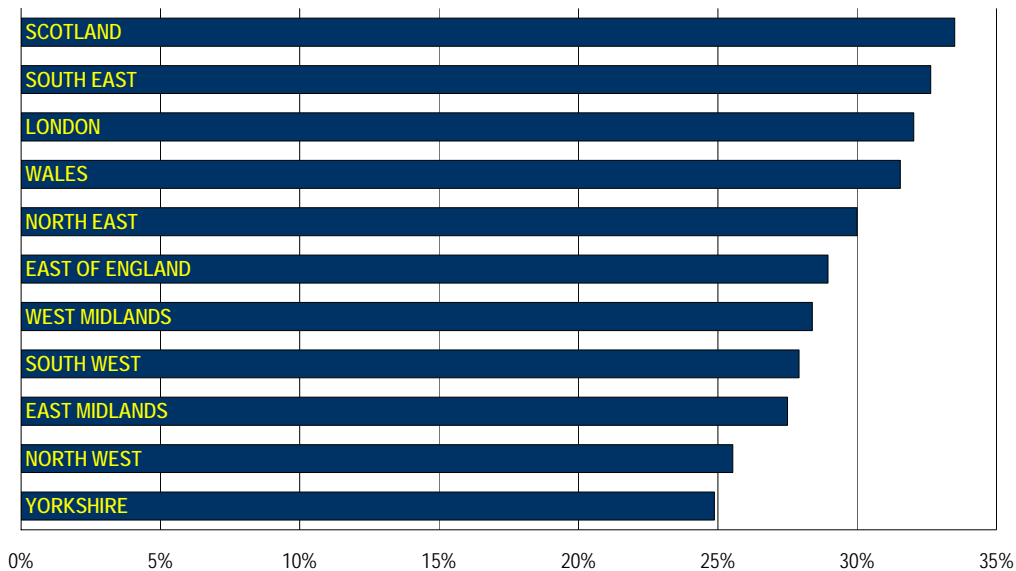
Top markets and top destinations

Britain welcomed more than 1 million French visitors who stayed 4-7 nights in 2008, with the USA just a cat's whisker behind. By contrast the USA is by far the most valuable 4-7 night market, worth £817m in 2008, over twice that of Germany.

Looking at the proportion of visits that are 4-7 nights in duration, we find Finland, Austria and Israel among the top flight.

Visits (000s)		Spend (£m)		Proportion of visits	
France	1,007	USA	817	Finland	44%
USA	995	Germany	351	Colombia	42%
Germany	908	France	318	Austria	41%
Spain	719	Spain	303	Israel	40%
Irish Republic	700	Italy	261	Russia	38%
Italy	526	Irish Republic	247	Denmark	38%
Netherlands	438	Netherlands	163	Hungary	37%
Poland	423	Australia	156	Spain	36%
Canada	254	Canada	153	Turkey	36%
Australia	242	Norway	143	Argentina	36%
Sweden	224	Poland	125	Iceland	35%
Norway	220	Sweden	117	Portugal	35%
Denmark	211	Denmark	101	USA	34%
Belgium	172	Switzerland	95	Singapore	33%
Switzerland	170	United Arab Emirates	79	Hong Kong	33%
Czech Republic	137	Russia	74	India	33%
India	118	India	66	Japan	33%
Austria	117	Belgium	62	Greece	32%
Hungary	112	Japan	61	Italy	32%
Portugal	97	Nigeria	54	Norway	32%

Proportion of visits that are 4-7 nights in duration



Finally we can see that 4-7 night stays are of more importance in Scotland than other nations and regions, with over one-third of trips lasting this duration, while less than one-in-four trips to Yorkshire in 2008 fell in to this trip duration category.

With short-stay business trips having been hard hit by the economic downturn, it looks certain that 4-7 night trips will continue to grow in importance, at least for the foreseeable future.

Issue of the Month – The BBC and inbound tourism

There are very few British institutions that have the literal and emotional reach around the globe as does the BBC. Statistics alone do not really do justice to the role that the broadcaster can play in bringing the concept of Britain closer to potential visitors, but the average weekly audience for BBC World Service radio programmes during 2008/9 was a staggering 188 million. Add to this the numbers watching BBC television programmes, ranging from soaps (EastEnders), light entertainment (Dr Who), comedy (Little Britain), costume drama (Pride and Prejudice) and documentaries (Picture of Britain), purchased by overseas broadcasters and the scale of the BBC's reach is clear.

A recent study undertaken by Deloitte investigated the 'Economic Impact of the BBC', with the report noting that the 'presence of a globally recognised UK brand associated with high quality output potentially boosts the sales and value of UK exports, both creative and otherwise'. Tourism is one of Britain's most successful exports, being our third highest foreign exchange earner, and through multiple channels (television, radio and websites) the BBC can help maintain our international tourism competitiveness.

Languages

From the table below we can see clearly that BBC World Service is definitely not solely about broadcasting in English, with programmes produced in no fewer than 32 languages (and with significant website content in each language too). It is estimated that around four out of every five listeners (so about 150 million per week) listen to BBC World Service programmes in a language that is not English.

Albanian SHQIP	Pashto پښتو
Arabic عربي	Persian فارسی
Azeri AZƏRBAYCAN	Portuguese BRASIL
Bangla বাংলা	Portuguese PORTUGUÊS
Burmese မြန်မာ	Russian Русская служба
Caribbean CARIBBEAN	Serbian SRPSKI
Chinese 中文网	Sinhala සිංහල
French FRANÇAIS	Somali SOMALI
Hausa HAUSA	Spanish MUNDO
Hindi हिंदी	Swahili SWAHILI
Indonesian INDONESIA	Tamil தமிழ்
Kinyarwanda KINYARWANDA	Turkish TÜRKÇE
Kirundi KIRUNDI	Ukrainian УКРАЇНСЬКА
Kyrgyz КЫРГЫЗ	Urdu اردو
Macedonian МАКЕДОНСКИ	Uzbek ЎЗБЕК
Nepali नेपाली	Vietnamese TIẾNG VIỆT

History lesson

The BBC first broadcast programmes outside Britain in December 1932, but at this stage only to English speaking nations that were part of the British 'Empire'. The first non-English language services – broadcast in Arabic and Latin American Spanish - started six years later in 1938. By the beginning of the Second World War in 1939 the BBC was broadcasting in seven different languages.

At the end of the 1940s there were 45 separate language services and the so-called 'English Service' was broadcasting 24 hours a day around the world, operating under the 'External Services' banner. In 1988 the corporation took the decision to re-brand 'External Services' as 'The BBC World Service'.

Today the BBC World Service is reckoned to be the world's leading international broadcaster providing programmes and content for radio, television, online and mobile phones in English and 31 other languages. While news coverage remains central to the international offering, programming encompasses business, the arts, culture, drama, science and sport.

An export platform for Britain and British talent

Radio is still a vital tool for gathering information, but television is a medium that allows for another of the Corporation's core remits to be ably delivered, namely 'entertainment'. BBC Worldwide's 'Sales & Distribution' business is one of the world's most successful exporters of television programmes, second only to the big US studios. The business accounts for around half of the UK's total television exports with around 40,000 hours of programming sold in the last year according to the BBC.

The business manages the annual BBC Showcase festival, a shop window for the best of British programming, which attracts around 500 buyers from across the globe every year. Broadcasters are able to watch hundreds of hours of programming and procure the latest titles from BBC Worldwide's catalogue.

BBC Worldwide operates a portfolio of 22 channel brands showing programmes in more than 100 countries and an estimated 300 million homes around the world. Channels wholly owned by BBC Worldwide include BBC America, BBC Entertainment and UKTV (in Australia). It is not just in English speaking parts of the world where BBC Worldwide is active, with three channels recently launched in both Malaysia and Hong Kong.

The range of television programmes that the BBC can broadcast or sell overseas brings to life many aspects of Britain that appeal to potential inbound visitors, be this through dramas, comedies or factual documentaries as illustrated in the following table.

Hook for visitors	Example programmes
Britain's natural scenic beauty	Coast, The Nature of Britain, Mountain
Britain's built heritage	How We Built Britain, Restoration
Britain's cultural heritage	A Picture of Britain, Seven Ages of Britain
British life in bygone era	Cranford, Pride and Prejudice
Contemporary Culture	EastEnders, The Office, Little Britain
British food	Naked Chef, Hairy Bikers

These programmes can boost prospects for British inbound tourism on many different levels:

- by reinforcing positive imagery of Britain's rich cultural and built heritage (known to be a key motivator for many holiday visits to Britain)
- by developing a better understanding among potential visitors of Britain's natural landscape (we know that most overseas residents are unaware just how diverse and attractive rural Britain is)
- by using bucolic scenery and built heritage, for example grand country houses as the backdrop for period costume dramas (Pride and Prejudice was sold to no fewer than 72 countries for example)
- by playing on British eccentricity which helps build the concept that Britain is 'authentic' and offers an experience you cannot get elsewhere
- by challenging negative perceptions of Britain, for example by showcasing the quality and variety of food on offer, including regional variations

News

Impartial, authoritative and trusted are just three of the words that the BBC and the majority of its listeners and viewers from around the world would choose to use about the Corporation's news broadcasts. Indeed, the BBC is best known internationally for its news offering.

BBC World News is the flagship television news outlet for the Corporation on the world stage, but it will be The World Service and BBC website through which most overseas residents who interact with BBC news coverage receive their information.

According to the latest Synovate PAX survey which takes place on a quarterly basis across the Asia Pacific region the BBC World News television channel has a monthly reach of 3 million people, with weekly reach of 1.5 million people. Weekly audience figures for the channel are growing at an annual rate of more than 20% across most major Asia Pacific markets including India, Australia and Singapore. The latest figures show that the number of frequent business travellers tuning in is 60% up on a year ago.

Closer to home recent viewing figures compiled by an EMS survey reveal that 12 million European 'top income earners' tune in to BBC World News each month. Demonstrating the importance of website content the survey found that the BBC international website attracted by far the largest number of 'opinion formers and decision makers' across European news websites, with six million 'viewers' per week.

Sport

As we have seen in earlier editions of *Foresight* watching or playing sport in Britain is a major attraction for many inbound visitors and the BBC enables the drama and excitement of British sporting events to be seen or heard around the world. Sporting events covered by the BBC include Wimbledon, The Open, Six Nations Rugby, Test Cricket and the London Marathon, but it is British football, and in particular the Premier League, that has the greatest resonance in the most overseas countries.

Every weekend during the football season BBC World Service broadcasts live football, and while the number of listeners who are spurred on to make a visit to Britain as a result of BBC

coverage will be few, there will doubtless be some whose enthusiasm for football is translated into a desire to travel to Britain thanks to regular exposure to commentary on British football.

Sport can be one of the motivators for British ex-pats who live overseas to make additional visits back to Britain, and this is a sizeable potential market as revealed by figures for 2008 showing that 12%, that is one-in-eight, of inbound visitors holds a UK passport.

In a little over two years from now London and Britain will play host to the world's most watched sporting event, the Olympic and Paralympic Games. The BBC will be pivotal in providing coverage to countries around the world with an unrivalled opportunity to showcase not only the venues where events take place but the rest of the country too.

The many faces of Britain

As we have seen, the BBC takes many characteristics that are unique to the British or Britain (eccentricity, natural landscape, culture and heritage) and shares them with a worldwide audience of millions, be this through radio, television or websites.

Crucially the BBC can not only reinforce positive images of Britain held by potential overseas visitors, but can help to address negative perceptions too, ensuring that alongside the more traditional image of Britain often entrenched overseas a more modern and dynamic portrait can be painted. One illustration of this is a recently agreed deal between BBC Worldwide and the organisers of the Glastonbury Festival to broadcast the event to a global television audience.

Events such as Glastonbury are an excellent way of demonstrating the dynamism that exists within Britain and the very 'rounded' offer that the inbound visitor can experience, encompassing heritage, scenery and contemporary culture. The BBC plays a crucial role in placing Britain on the radar of millions of potential inbound visitors.

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