

FORESIGHT is our monthly commentary on significant issues within the inbound tourism sector. This month our first article looks at the role of music in attracting inbound visitors to Britain, while our second article showcases a range of key facts and figures relating to the Visiting Friends and Relatives market.

The importance of music to inbound tourism

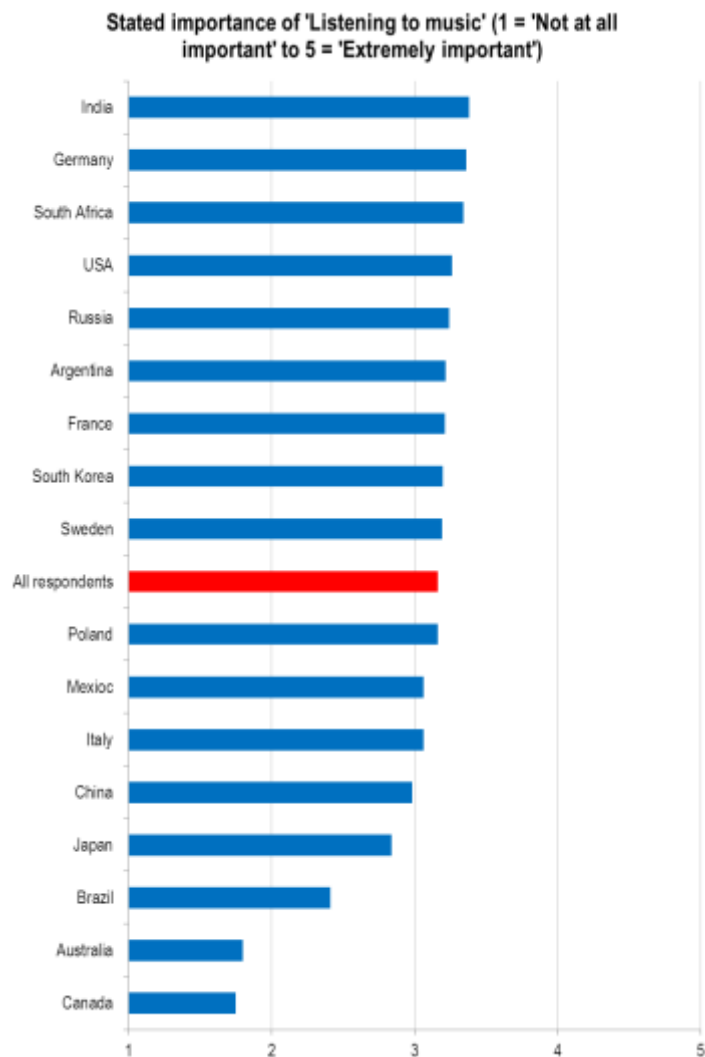
From Adele to Elgar, the Beatles to Queen, Rod Stewart to Duffy, there is little doubt that some of the most listened to music across the globe has its origins in Britain. Britain’s musical creativity is world renowned, with international visitors having a wide array of ‘live’ music to sample during a trip to Britain, be this the Proms in the Royal Albert Hall, Glastonbury, Edinburgh Military Tattoo, or Les Misérables in the West End at one end of the spectrum right through to a gig by an as yet unknown artist in a Yorkshire pub or Cornish folk songs sung at the harbour’s side on a summers evening in June.

Role of Music in Life

In 2009 VisitBritain sponsored a question on the Anholt GfK Nations Brand Index Survey (a survey of around 1,000 online panellists in each of twenty countries worldwide) that asked respondents about the things that were important to them in their life, including their career, taking holidays, spending time with friends and family and so on, with one of these factors also being ‘Listening to music’.

As can be seen from the chart ‘Listening to music’ was not considered a top priority, with those in India and Germany each giving a rating of just below 3.4 on a scale that ran from 1 = ‘Not at all important’ through to 5 = ‘Extremely important’.

Those in the majority of countries clustered around the ‘All respondents’ average of 3.16 with only those in Australia and Canada (and to a slightly lesser extent Brazil) indicating that ‘Listening to music’ was a very low priority in their lives.



The influence of music on destination choice

Another question that VisitBritain sponsored in the same 2009 Anholt GfK poll looked at attitudes towards holidays, with respondents asked to state how far they agreed with a raft of different statements on a scale that ran from 1 = 'Strongly disagree' through to 7 = 'Strongly agree'.

One of the statements included was 'Music I've listened to has influenced my choice of vacation destination'.

It can be seen from the chart that the average respondent fell slightly on the 'disagree' side of the middle ground of '4', with a rating of 3.5.

Those in China were the most likely to agree with the statement, with a rating of 4.7, followed by two other Asian markets, namely India and South Korea.

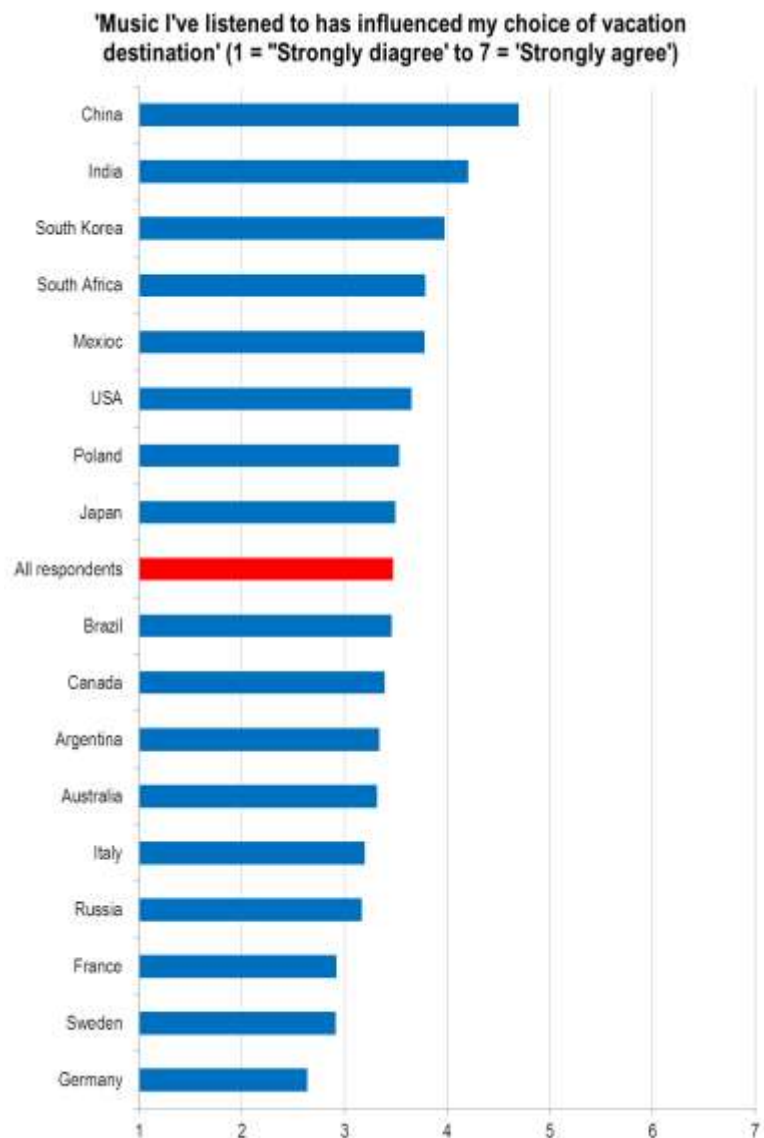
Those who were least likely to agree with the statement tended to be residents of mature outbound tourism markets such as Germany, Sweden and France, though it is also noteworthy that respondents in Russia were more likely to disagree than agree (though only weakly).

Britain and music

As part of the main syndicated Anholt GfK Nations Brand Index Survey respondents are invited to identify those cultural activities or products that they would most expect to be produced in different countries. Among the ten listed options presented to the panellists are three that touch on music, namely 'Music', 'Pop videos' and 'Opera'.

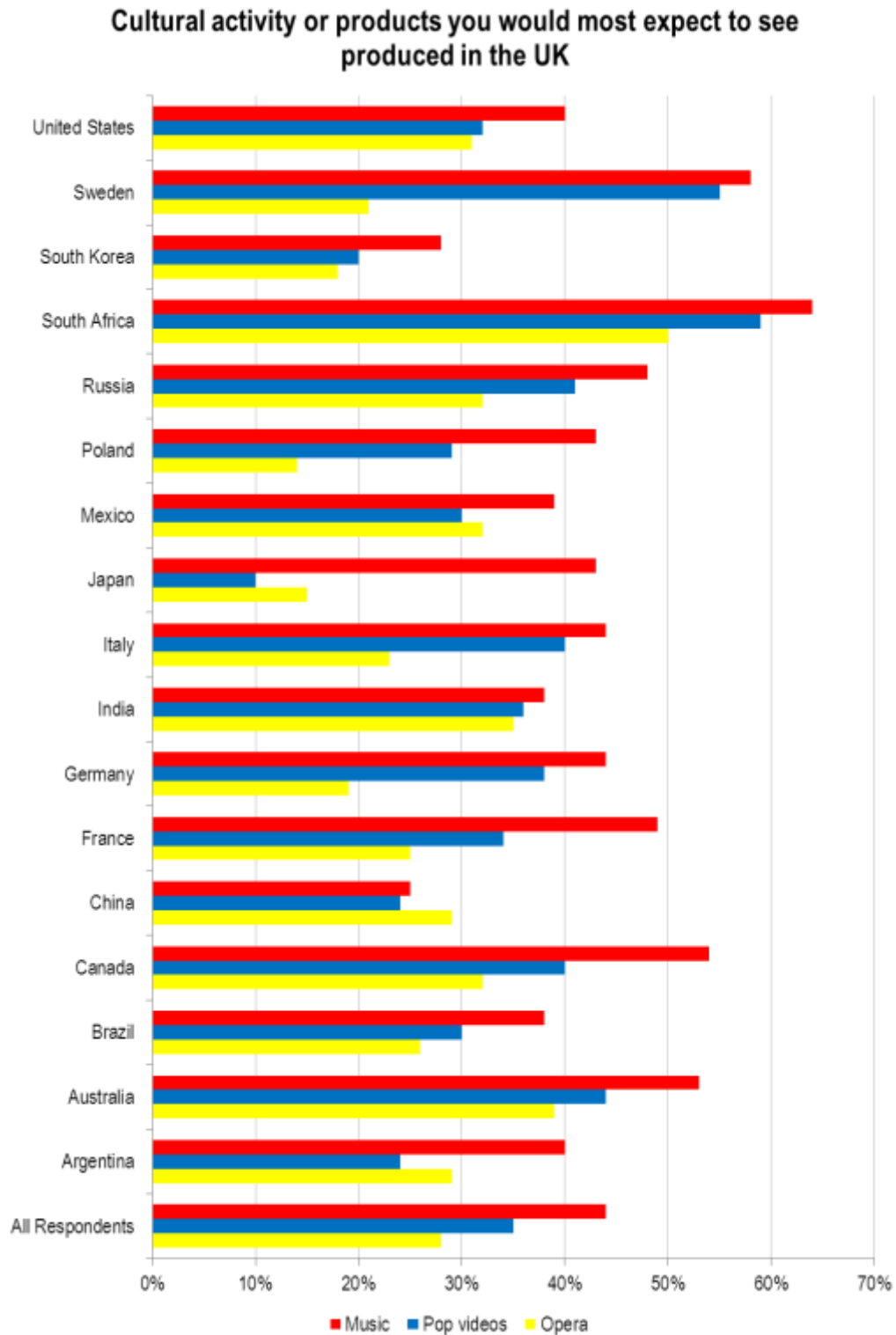
The percentage of respondents in different markets that consider each of these to be associated with Britain can be seen in the following chart (based on results from the 2011 survey) and it is apparent that 44% felt that 'Music' was a cultural activity that they would expect to be 'produced' in Britain, with a considerable range across different markets (64% of those in South Africa through to just 25% of those in China).

It is notable that the preceding chart revealed a higher than average propensity for those in Asia to have been influenced in their destination choice by music they had listened to, whereas the same markets have a below average propensity to associate 'Music' with Britain.



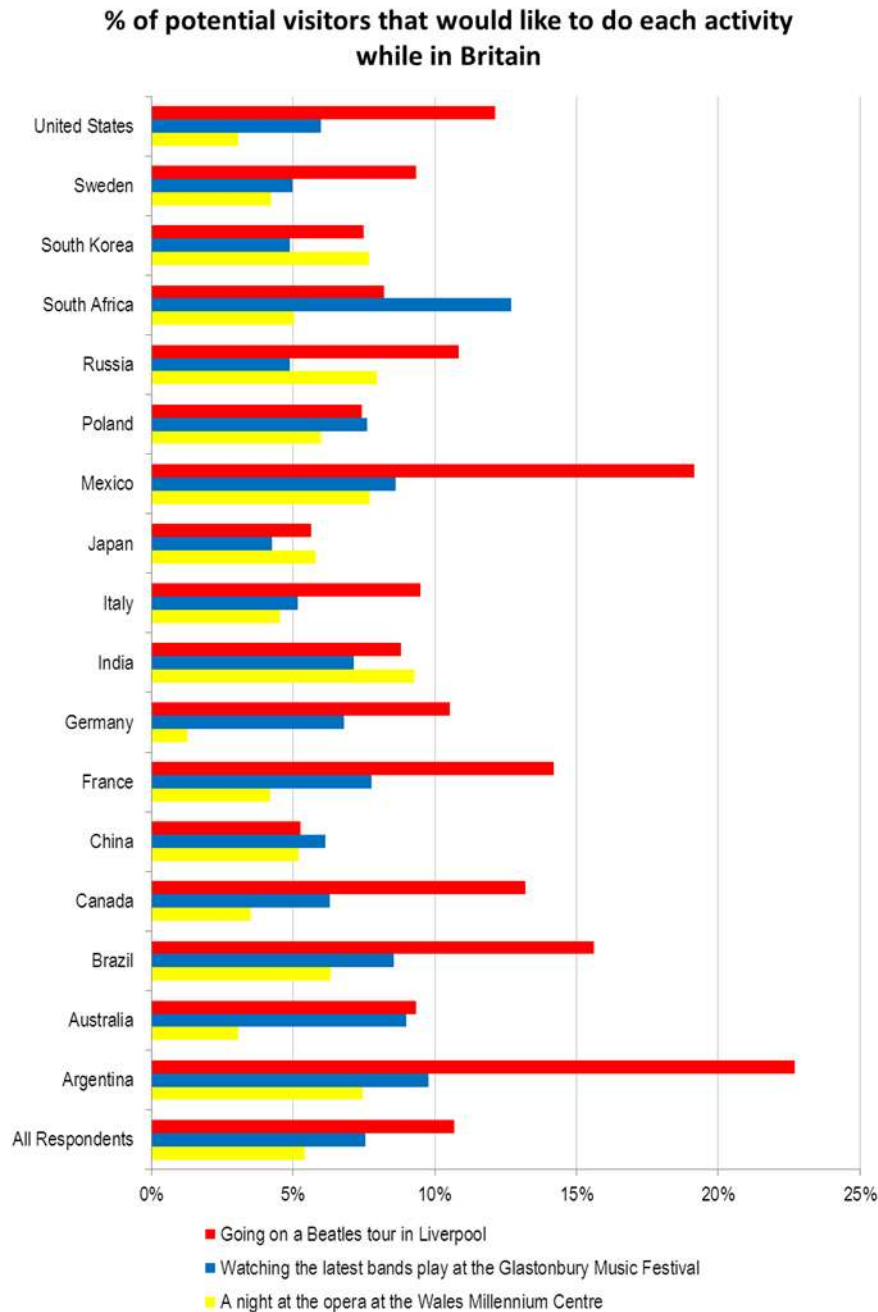
Nearly six-in-ten of those in Sweden and South Africa expect to see Britain producing 'Pop videos' compared with an overall average of 35%, and a mere 10% of those in Japan.

Finally looking at 'Opera', slightly fewer than three-in-ten of respondents considered this to be a cultural activity they would expect to be produced in Britain, but once again there was some variation, with half of those in South Africa but only 14% of those in Poland opting for this choice.



Aspirational musical activities in Britain

In 2010 VisitBritain sponsored a question on the Anholt GfK Nations Brand Index Survey that asked which activities from a pre-defined list respondents would like to do were they to visit Britain. The activities were highly Britain specific rather than generic, and respondents could select up to three different activities.



The above chart shows the percentage of potential visitors that would like to do three contrasting activities that each has a musical thread running through it; 'Going on a Beatles tour in Liverpool', 'Watching the latest bands play at the Glastonbury Music Festival' and 'A night at the opera at the Wales Millennium Centre'.

The most appealing of these activities was the Beatles tour, with 11% of all respondents saying they would like to do this were they to visit Britain. It is interesting to see that those in the Americas were

much keener than was the average respondent to experience the Beatles tour, while for those in Japan and China the activity held much less appeal.

Some 8% of respondents were keen on the idea of watching the latest bands at Glastonbury, with those in South Africa (13%) the keenest on the idea and those in Japan (4%) the most apathetic. Only one-in-twenty felt that they would like to spend a night at the opera in Cardiff, although the figure was a little higher for respondents in a number of markets including Russia and India, while those in the USA and Canada were the least interested in the idea.

Music activities undertaken by overseas visitors to Britain

Each year VisitBritain sponsors questions on the International Passenger Survey relating to different activities that international visitors may have done during their stay in Britain. In 2009 a couple of these activities related to musical experiences, namely 'going to the theatre' and 'going to live music events'. Clearly not all those who go to a theatre will be experiencing music, but according to research by Ipsos Mori, among overseas visitors who go to the theatre in London 64% go to see a Musical, while 25% watch a play, 3% Dance and 1% Opera.

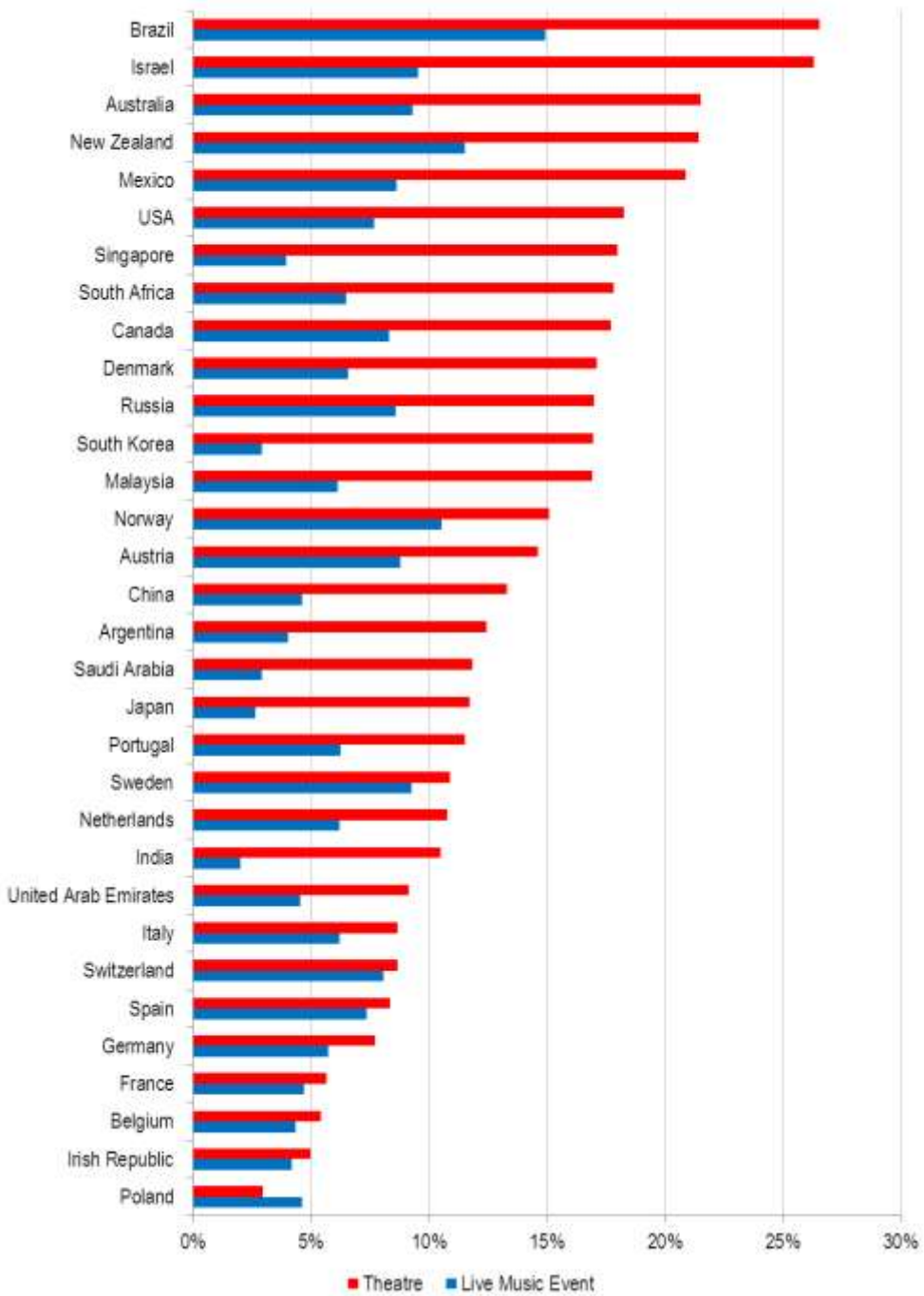
It can be seen from the chart that roughly one-quarter of those visiting from Brazil and Israel said that they had gone to the theatre, while more than one-in-five from each of Australia and New Zealand had done so, with the proportion for those visiting from the USA being only slightly lower. Those visiting from countries close to Britain, including Ireland, France and Belgium, were the least likely to report having gone to a theatre during their stay.

There are some notable contrasts when looking at the proportion of visitors who go to a live music event, although those from Brazil remain the most active in this regard, with 15% taking in a live music performance, a little ahead of 12% of those from New Zealand and 11% of those from Norway. A very small proportion of visitors from Asian markets including Japan, India and South Korea reported having been to a live music event.

Summing up

Be it a celebration of a new British artist breaking onto the global music scene, or marking a musical anniversary (2012 will see the 50th anniversary of the Beatles' 'Love Me Do', 2013 the 100th anniversary of the birth of Benjamin Britten), music is a perennial strength for attracting overseas visitors to Britain and for reminding potential visitors of Britain's ability to offer a blend of traditional and cutting edge musical experiences all in one destination.

Proportion of visits that include going to the theatre or a live music event



The Visiting Friends and Relatives Market

More than one in four visits to the UK from overseas in 2010 were from people who were visiting friends or relatives, that's 8.4 million visits in total.¹ On average, during the course of their visit VFR visits spend £423. Overall they generated £3.554 billion for the UK in 2010.

Just over one in four (27%) of VFR visits were from UK nationals who live overseas returning to visit friends and relatives - they accounted for 30% of the amount spent by VFR visitors. An estimated 6.15 million VFR visits were from non-UK nationals, who spent £2.5 billion.

Where do VFR visitors come from?

VFR visitors are most likely to come from the Irish Republic, France and the USA. (This excludes UK nationals who live overseas, see below). The following table shows those markets which generate the most VFR visits.

Top Markets for VFR visits in 2010			
Rank	Nationality	Visiting from (Market)	Visits (000)
1	Irish	Irish Republic	732
2	French	France	534
3	Americans	USA	495
4	Polish	Poland	458
5	German	Germany	427
6	Dutch	Netherlands	303
7	Australians	Australia	254
8	Spanish	Spain	248
9	Italians	Italy	223
10	Canadians	Canada	195

To some extent this reflects the major markets for visiting Britain overall, but there are a number of markets where an above average proportion of visitors are likely to be coming to visit friends and relatives. The table below shows major markets (which annually generate at least 100,000 visits) and where between one in two and one in three visitors are VFR visitors (compared to just over one in four overall). It shows those from New Zealand, Poland, South Africa, UAE, the Irish Republic, Australia, Canada, Hong Kong and Israel are more likely to be visiting for VFR reasons than those from other markets.

Major markets (100,000 visits+) where high proportions of visits were for VFR purposes in 2010				
Rank	Market	All visits (000)	VFR visits (000)	Proportion of visits which are VFR
1	New Zealand	187	95	50%
2	Poland	1,101	463	42%
3	South Africa	208	87	42%
4	United Arab Emirates	213	86	40%
5	Irish Republic	2,629	1,039	40%
6	Australia	986	381	39%
7	Canada	686	261	38%
8	Hong Kong	131	48	37%
9	Spain	1,809	619	34%
10	Israel	158	53	33%

Which are the most valuable markets to target?

Amongst VFR visitors Americans, Australians and those from the Irish Republic spend the most overall during their visits to the UK. Amongst these visitors Australians, Canadians and Americans spend most per visit on average.

Top Markets for VFR spend in 2010 (£100 million +)				
Rank	Nationality	Visiting from (Market)	Total Spend (£ million)	Average spend per visit
1	Americans	USA	224.6	£453
2	Australians	Australia	211.1	£831
3	Irish	Irish Rep	167.2	£228
4	German	Germany	125.7	£294
5	French	France	109.1	£204
6	Polish	Poland	108.9	£238
7	Canadians	Canada	100.1	£513

What about UK nationals who live overseas and return to visit friends and relatives?

Looking by nationality UK nationals were of course the largest group visiting the UK for VFR purposes in 2010. In line with data presented from the International Passenger Survey by the Office for National Statistics we include all those who are not UK residents in our figures. In 2010 there were 2.258 million visits from UK nationals who have lived overseas for 12 months or longer. They are most likely to be living in France or Spain. The table below shows where UK nationals who visit for VFR are living.

Top Markets for VFR visits from UK nationals in 2010 (100,000 +)			
Rank	Markets (where UK nationals live)	Visits (000)	% of all VFR visits from UK nationals
1	France	352	16%
2	Spain	335	15%
3	Irish Republic	181	8%
4	Germany	171	8%
5	USA	156	7%
6	Australia	110	5%
7	Netherlands	104	5%
8	Switzerland	75	3%
9	Italy	71	3%
10	United Arab Emirates	63	3%

Area level data

[Click here](#) to download a file showing the number of VFR visitors to each of the following nations / regions. You can see where VFR visitors to each region come from, how long they stay and how much they spend.

- London
- South East
- South West
- East of England
- East Midlands
- West Midlands
- Yorkshire
- North East
- North West
- Northern Ireland
- Scotland
- Wales

¹ Data from International Passenger Survey has been made available by the Office for National Statistics and has been used by permission. The ONS do not bear any responsibility for the analysis or interpretation of the data reported here. Crown Copyright 2012. Source: ONS

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