Our market intelligence products provide an unrivalled source of information on inbound tourism. They paint a detailed picture of past, present and future inbound UK tourism trends, helping you gain an insight into how markets and segments are performing, as well as how Britain is perceived by prospective visitors.
The importance of the pub to inbound tourism

Introduction

It is thought that Britons have been able to sup their favoured tipple in a pub from around the time the Romans were engaged in a spot of early international tourism throughout much, but not all, of Britain.

There are competing claims as to where the oldest pub in Britain can be found, with St Albans, Nottingham and Manchester all laying claim to this honour, but what’s fairly certain is that there are literally dozens of pubs across Britain that have been filling glasses for well over half a millennia.

The British Beer and Pub Association reckons that the number of pubs in Britain in 2010 was around 51,000 (roughly 10,000 fewer than a decade before), meaning that regardless of where an inbound visitor happens to be in Britain, they are probably not too far away from a pub, be this in an urban or rural part of the country.

Each year VisitBritain sponsors a number of questions on the International Passenger Survey to provide an insight into what types of activities overseas residents have got up to during their time in Britain.

One of the activities asked about during 2011 was ‘Going to a pub’. The results underscore just how integral a part the pub plays in the experience of very many inbound visits; during 2011 13.8 million visits (around 45% of all visits) included at least one visit to a pub.

We do not have information on how much was spent by those from overseas in pubs, but what is apparent from the results is that the average amount spent by those whose itinerary includes a pub spend rather more than those who do not (£676 versus £502).

Visit characteristics

Seasonality

There is very little seasonal variation in the propensity of inbound visits to feature time in a pub, and this is little surprise of course, with many pubs offering somewhere warm and cozy in mid-winter and the chance to drink and eat in beer gardens during warmer months.

Journey purpose

From Chart 1 it is apparent that about one-in-three business visits will encompass a trip to a pub, with this proportion rising to more than one-in-two for holiday, VFR and study visits. ‘Miscellaneous’ visits includes trips that are primarily for reasons such as ‘medical treatment’, ‘personal shopping’ and ‘looking for work’, and roughly one-third of these trips will feature a pub.

Chart 1: Proportion of visits featuring a visit to a pub by journey purpose

Duration of stay

It would seem from Chart 2 that there is a positive correlation between the length of time a visit to Britain lasts and the probability that it will include time in a pub, though the relationship would appear to plateau once trips are lasting for 4-7 nights or more.

There will of course be some relationship between duration of stay and journey purpose, and business visits tend to last less time than those for leisure, helping to explain why only two-in-five of 1-3 night visits features a pub. Nevertheless, it can be observed that even 9% of those not spending any nights in Britain squeeze an hour or so in a pub into their time in Britain.

Chart 2: Proportion of visits featuring a visit to a pub by duration of stay
Visitor characteristics

Demographics
So which visitors are most and least likely to be found in a pub in relation to their age and gender?

Chart 3 confirms that there is very little variation with the exception of only around one-in-five of those aged 15 or younger visiting a pub. For most age groups about one-half of visitors will go to a pub, with this being the case for both men and women. There is a slightly reduced tendency for female visitors aged 65+ to go to a pub, but even here it is almost 2-in-5 that do so.

Chart 3: Proportion of visits featuring a visit to a pub by age and gender

Global tour
There can be few places around the world where the ‘pub’ is not considered to be a very ‘British’ establishment, though it is perhaps the ‘Irish pub’ that has become a feature of many an overseas city.

Regardless of the degree to which pubs are thought of as British the more important piece of information when considering marketing opportunities is which visitors, by country of residence, are most and least likely to spend time in a pub during a trip to Britain.

As has been already demonstrated, the chances of a visit including a pub vary somewhat by journey purpose, so the following series of charts explore the likelihood that a visit will feature this activity by both major journey purpose and country of residence.

Starting with the Americas Chart 4 reveals that roughly six-in-ten residents of Canada and the US who are on holiday or visiting friends or relatives in Britain go to a pub, whereas those from South America are a little less likely to be found ordering drinks in a pub. Among this group, it is business visits from Argentina that are least likely to involve a pub.

Chart 4: Proportion of visits featuring a visit to a pub (Americas)

Turning to the Far East and Australasia (Chart 5) it is very evident that those from Australia and New Zealand feel very much at home in a British pub, with around three-quarters of all leisure visits from these two markets including time in a pub, and virtually the same proportion of business visits doing so too.

By complete contrast only around one-fifth to one-third of holiday visits from the Far East, including countries such as Japan and China, tend to get first-hand experience of British pubs during their stay. It is interesting to note that for the most part those on a business visit from an Asian country are more likely than their compatriots who are in Britain on holiday to pop into a pub.

Chart 5: Proportion of visits featuring a visit to a pub (Far East/Australasia)

Turning to the Middle East, South Asia and Africa, Chart 6 indicates that for the majority of those visiting Britain from these parts of the world the pub is not top of the ‘to do’ list when travelling to Britain. South Africa is the only market to broadly mirror the ‘all market’ averages, whereas for many of the markets, for example Saudi Arabia, India and Egypt, less than one-fifth of holiday visits will feature time in a pub, no doubt reflecting...
different cultural norms.

Unlike the situation with the Far East there is little difference in the propensity of those on a business or VFR trip to go to a pub than for holiday visits when looking at most of the Middle East.

At first sight it may seem quizzical that visits from the UAE, particularly among VFR visits, have a fairly high tendency to go to a pub, but this can be explained by the fact that the figures presented here are based on country of residence rather than nationality and in 2011 57% of all visits from the UAE to Britain were made by those with British nationality.

**Chart 6: Proportion of visits featuring a visit to a pub (Middle East, South Asia and Africa)**

Finally looking at Europe (Chart 7) it is evident that around half of leisure visits from the majority of markets include time in a pub, with these proportions highest for those from Nordic markets and the Irish Republic, while being somewhat lower for Britain’s highest volume inbound market, France.

A very similar picture emerges from the chart when looking at business visits, with those from countries such as Finland, Norway and Iceland being especially likely to go to a pub, whereas only 11% of business visits from Poland does so – although this may well be explained by virtue of the fact that most business visits to Britain from Poland are by those driving a lorry, a group that clearly one would not expect to be venturing into too many pubs during their stay.

**Chart 7: Proportion of visits featuring a visit to a pub (Europe)**

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**Perceptions**

In the 2011 Anholt GfK Nations Brand Index Survey Britain was ranked 12th out of 50 nations in terms of the ‘welcome’ that potential visitors believe would be extended to them, suggesting that there is some room for improvement.

Each year VisitBritain sponsors questions on the Civil Aviation Authority Departing Passenger Survey, exploring how Britain is rated by actual visitors in terms of ‘welcome’ and the degree to which Britain is likely to be recommended for short-breaks and holidays.

The study investigates the ‘touch-points’ at which visitors felt most and least welcome during their trip, with respondents able to list up to three, and in 2010 (with 2011 results available in summer 2012) 39% of all respondents mentioned ‘Pubs / bars’ as one of the places they were made to feel most welcome, beaten only by ‘Restaurants’ with 42%.
It is evident then that pubs are a channel through which Britain, and indeed Britons, extend a very strong welcome to overseas visitors, and this is important, for the study revealed that among those reporting to have been made to feel ‘very’ or ‘extremely welcome’ during their trip 90% were ‘Extremely’ or ‘Very likely’ to recommend Britain for a holiday or short-break, whereas among those who felt ‘Not welcome’ or just ‘Quite welcome’ only 54% were ‘Very’ or ‘Extremely likely’ to recommend Britain.

Pubs are one of the few places where visitors from overseas can readily interact with locals and get a flavour for ‘everyday life’ in Britain. This interaction can facilitate the sharing of ‘insider knowledge’ where locals are able to recommend the best things to see and do, where to find good restaurants and alike, thereby enhancing the overall visitor experience and helping to improve perceptions of ‘welcome’.

**Drink... and food too**

Increasingly pubs are offering a range of eating opportunities to their customers, ranging from traditional favourites such as ‘fish and chips’, through to quality dining experiences with menus based on locally sourced products.

Pubs typically offer very good value for money, so in addition to having the potential to bolster perceptions of ‘welcome’ they equally provide a means by which to demonstrate to visitors that Britain offers excellent ‘value’.

For those visitors who are touring particular regions of Britain the pub can provide an ideal stopping off point for lunch or dinner, and provide the flexibility of either a hearty meal or a light snack.

Although as noted earlier we do not know how much inbound visitors spent in pubs during 2011, were we simply to assume that each visitor who did pop into a pub bought just a single pint of beer, then inbound visitors contribute at least £40m annually to the till behind the bar.