

FORESIGHT is our monthly commentary on significant issues within the inbound tourism sector. This month our first article looks at results from the latest wave of the European Commission survey on the attitudes of Europeans towards tourism, with the second article profiling inbound visitors who in 2010 said they walked by the coast while in Britain.

Attitudes of Europeans towards tourism

In the May 2009 edition of Foresight (Issue 67) we took a look at the results of a survey undertaken by the European Commission that studied the attitudes of Europeans towards tourism. In February of this year the EC undertook what was the third annual wave of this survey, so this month we consider what the latest findings tell us.

The Headlines

Three out of every four citizens of the 27 EU nations said that during 2010 they had travelled at least once during 2010 for either private or business reasons. Within the survey respondents were asked about different sorts of trips that they might have taken, with the categories including 'short private trips' (those lasting less than four nights) and 'holiday trips' (defined as those lasting for four or more nights). According to the study 32% had made at least one holiday trip and at least one 'short private trip', while 24% had made at least one 'holiday trip' but no 'short private trips' and 12% had made at least one 'short private trip' but no 'holiday trips'.

Around three in ten EU citizens (29%) said that they had not travelled for leisure purposes during 2010. This represents a slight reduction from the findings of earlier survey waves in 2009 and 2010 when around 33% said they had not taken any trips for leisure during the previous year.

The majority of the 27 EU countries have a land border with another nation, so it should come as little surprise to discover that the survey found 44% of trips to the main holiday destination were undertaken by car or motorbike. However, this does represent a slight decline on previous years, and by contrast the proportion travelling to their main holiday destination by air has increased to 39% (from 35% back in 2009).

Market motivators

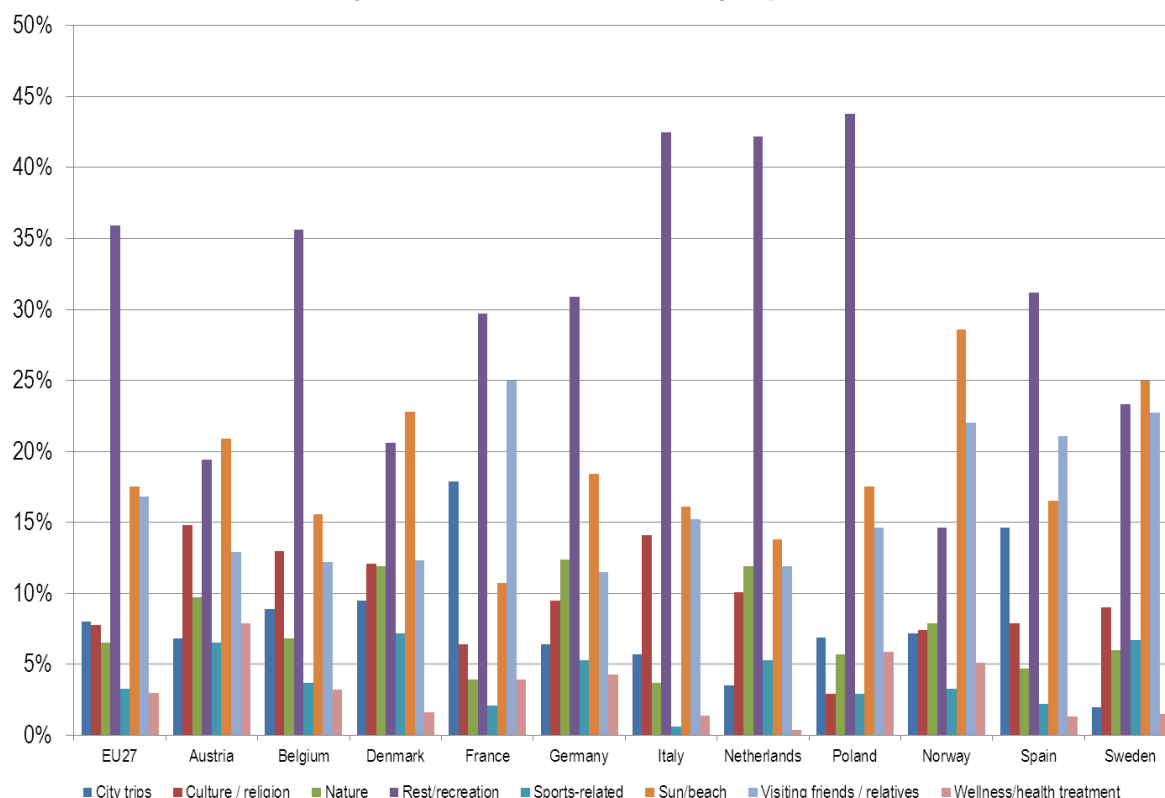
Turning our attention now to the responses to a handful of the questions put to respondents by individual market (the full report provides data for all 27 EU nations plus Croatia, Turkey, Macedonia, Norway and Iceland, but here we provide results for some of the major source markets for inbound tourism to Britain only).

Anyone who had made at least one holiday trip (that's a trip lasting four or more nights according to the EC definition) were asked 'What was the major motivation for your main holiday trip in 2010?'

The chart below plots the results for some of the markets covered and reveals that:

- for seven of the markets 'rest/recreation' is the primary motivator
- for four of the markets (Austria, Denmark, Norway and Sweden) 'sun/beach' is the primary motivator
- Visiting friends/relatives is the second most mentioned motivator for respondents in France
- The two motivators mentioned least often were 'sports related' and 'Wellness/health treatment'

Major motivation for main holiday trip in 2010

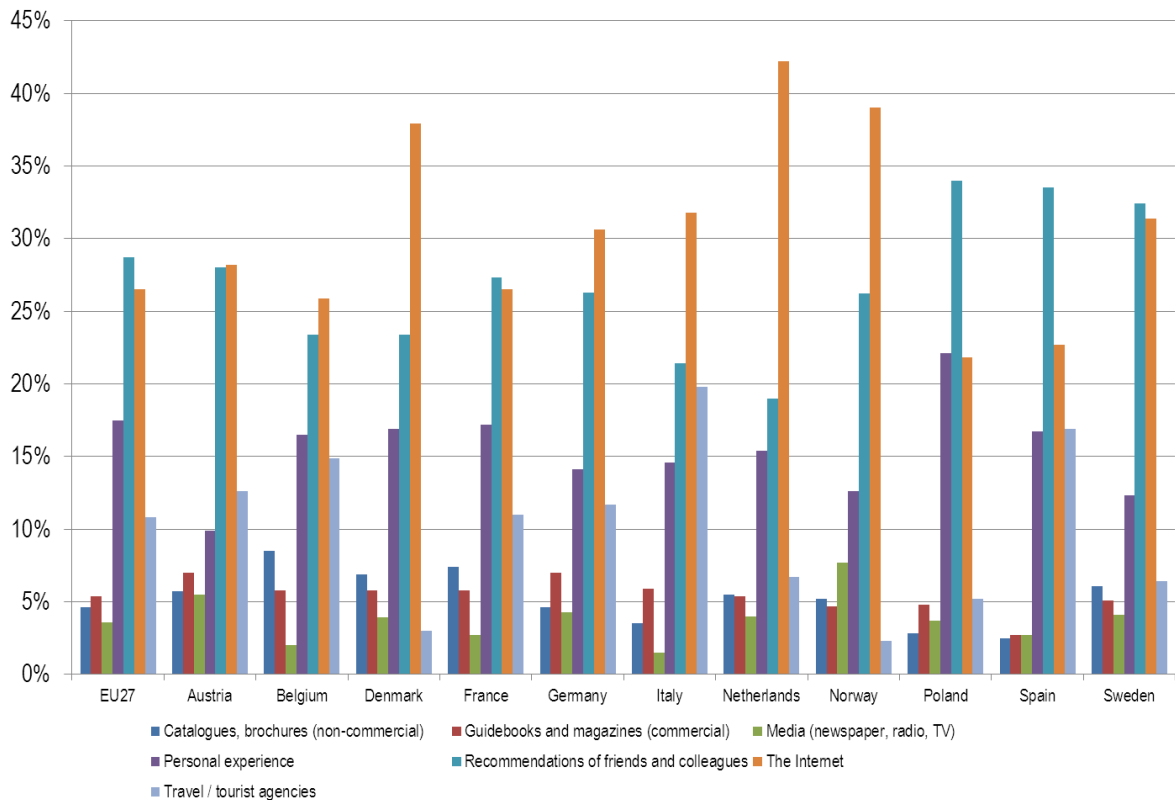


Information sources

Respondents were asked to consider a list of possible sources of information and state 'which one do you consider to be the most important when you make a decision about your travel plans?' From the answers to this question it is apparent that:

- for seven of the markets covered 'The Internet' is the most important source
- for the remaining four (France, Poland, Spain and Sweden) 'recommendations of friends and colleagues' is the most important source
- The Internet is mentioned as the most important source in the Netherlands and least in Poland
- Media (newspaper, radio, TV) is rarely mentioned – typically the most important source for about one-in-twenty respondents

Most important source when making travel plan decisions

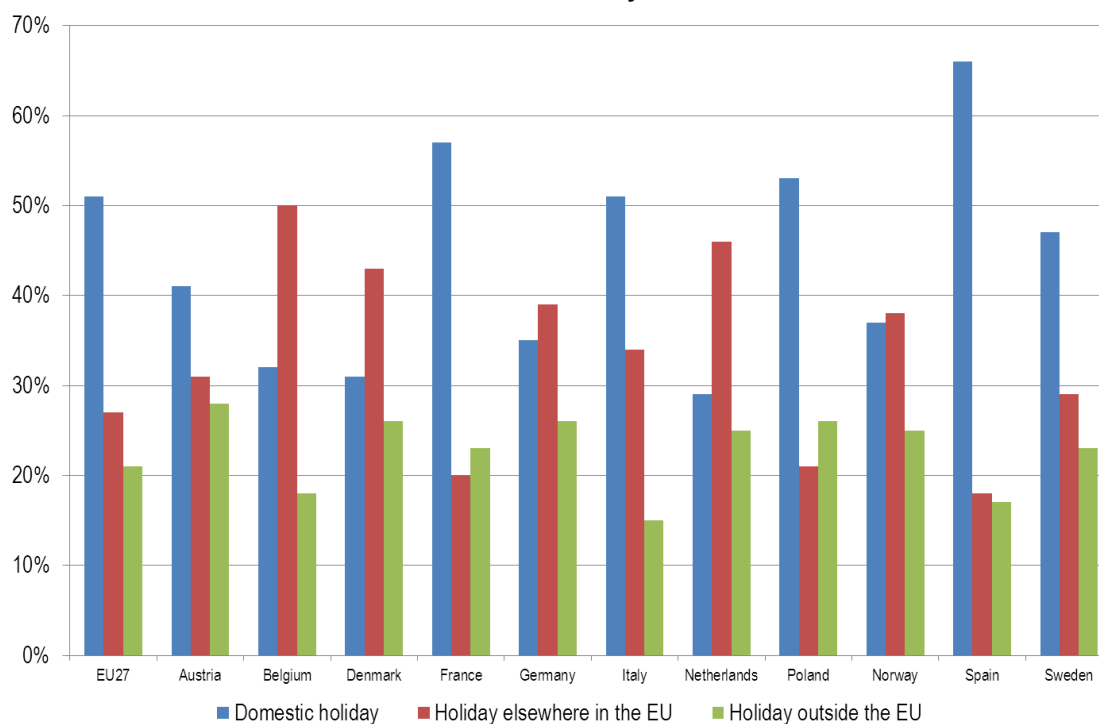


Holiday plans for 2011

Finally it is worth looking at what the report found with regard to holiday plans for 2011. Those respondents who said that they planned to take a holiday during 2011 were asked 'where do you plan to spend your main holiday in 2011?' The highlight findings being:

- respondents in Spain (66%) and France (57%) were the most likely to say that their main holiday in 2011 would be in their own country
- the Dutch were the least likely to say that their main holiday in 2011 would be in their home country (29%)
- five markets (Belgium, Denmark, Germany, Netherlands and Norway) were more likely to plan a main holiday 'elsewhere in the EU' than in their own country
- among these markets Belgium (50%) were the most likely to be planning a holiday in the EU but not their home country
- the Spanish were the least likely to be planning an EU holiday that was not in their home country (18%)
- Austrians were the most likely (28%) to say they were planning for their main holiday in 2011 to be in a country that was outside of the EU
- Italians (15%) were the least likely to be heading outside of the EU for their main holiday

Planned destination of main holiday in 2011 for those planning to take a main holiday



Survey method

Fieldwork for the survey took place in late February 2011 with 30,000 randomly selected citizens of the EU27 countries plus Croatia, Turkey, the former Yugoslav Republic of Macedonia, Norway and Iceland being interviewed. With the exception of a few markets interviewing took place by telephone, and where this was not the case a face-to-face approach was adopted.

Full report

The full 100-page report published by the European Commission can be found here: http://ec.europa.eu/public_opinion/flash/fl_328_en.pdf

The report includes commentary and analysis, the full questionnaire and results broken down by demographic segment and country of residence for each country covered in the study.

Inbound visitors who go for a walk along the coast

In 2011 VisitBritain again sponsored a question on the Office for National Statistics International Passenger Survey¹ that asked departing visitors about types of activity that they may have undertaken while in Britain.

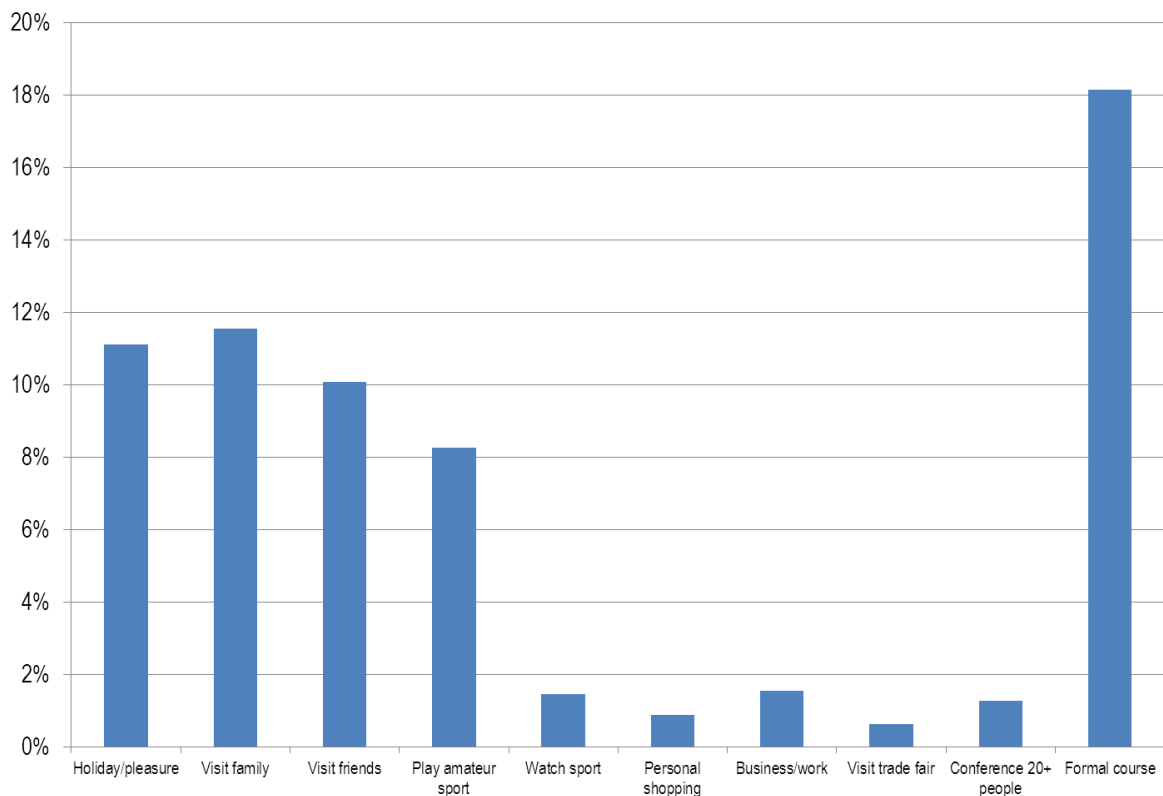
Among the activities asked about was 'walking along the coast', something that Britain is blessed with rather a lot of, and the findings reveal that no fewer than 2.4 million (around 8%) visitors said that they had done so during their trip in 2010. It is important to recognise that 'a walk along the coast' covers a broad spectrum, from a half-hour amble along the promenade at Brighton, to a strenuous day-long trek along the undulating Cornish coast from Mevagissey to Fowey, but it is not possible from the findings of the survey to distinguish between the different types of walk that this activity might encompass.

Walking by the coast is something that can be done at any time of year, but it is perhaps no surprise to discover that 47% of the 2.4 million inbound visitors who did this last year undertook the activity in the July to September period and a further 29% did so during the three months from April to June.

Trip purpose

The following chart shows the proportion of visits that included 'a walk along the coast' based on the overall purpose of the visit. We can see that those here for a 'formal course' had the highest propensity to enjoy some coastal fresh air, with nearly one-in-five (18%) doing so. It is worth noting that many English language courses are delivered in coastal resorts, thus readily facilitating a walk along the coast during the trip.

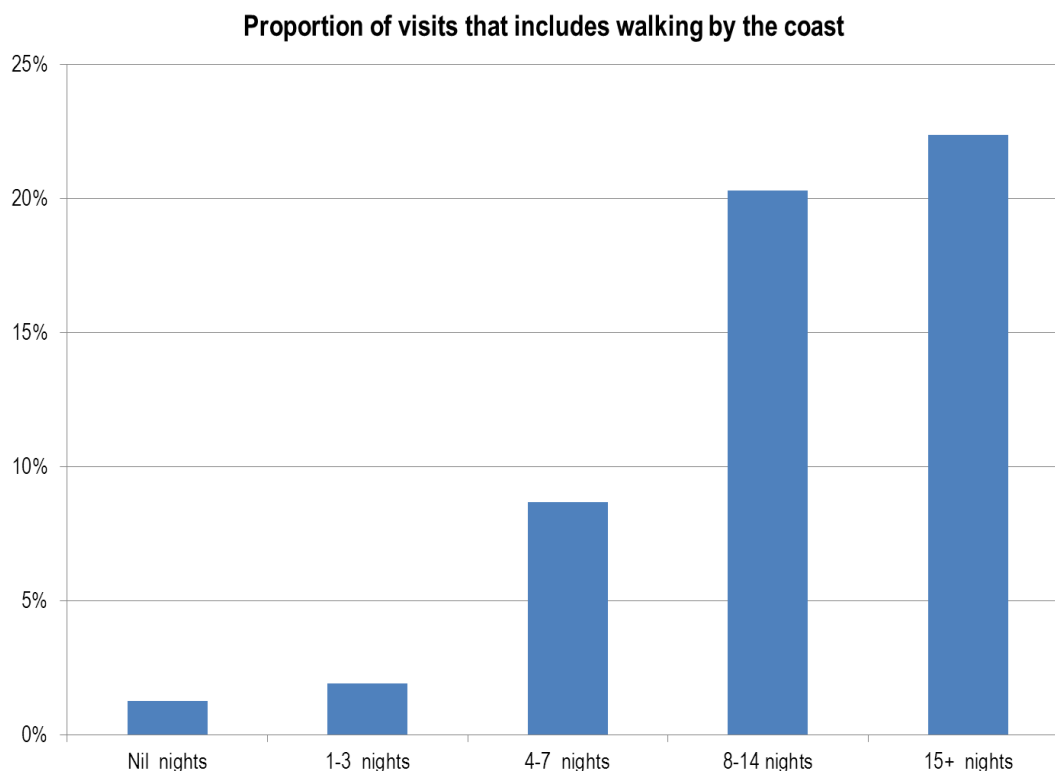
Proportion of visits that includes walking by the coast



Roughly one-in-ten of visitors who travel to Britain for a holiday or to visit family or friends said that they went for a walk along the coast, whereas only a tiny minority of those here for a business visit found time to do so.

Length of stay

As we have seen on many occasions when looking at inbound visitors' propensity to undertake different sorts of activity there is a strong correlation between duration of stay and the chance that the activity will feature during the trip. There is no exception when we look at going for a walk along the coast as is clear from the following chart.



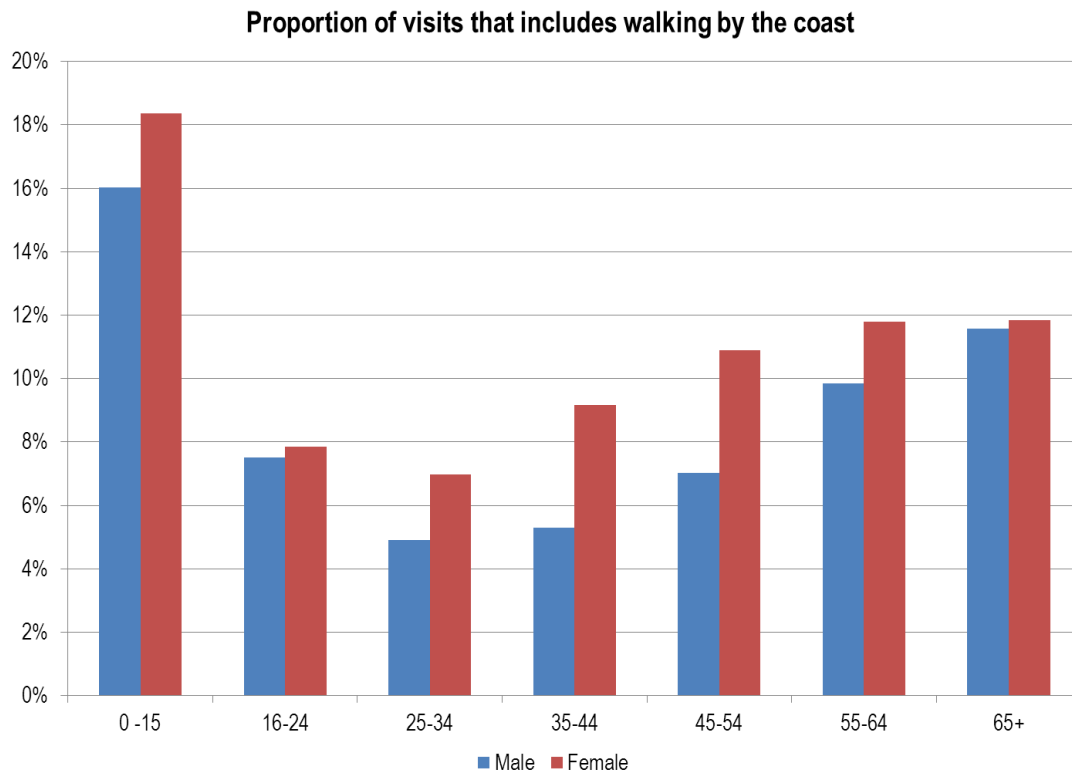
Worth mentioning is the fact that visitors on study trips typically stay for longer than visitors for many other journey purposes, so there is some connection between the high probability of those staying 15+ nights and those in Britain to attend 'a formal course' to go for a walk along the coast.

Demographics

There is of course a link between the purpose of visit and a visitors' demographic characteristics, meaning that while we can compare and contrast variations in the propensity to go for a walk along the coast for different age and sex categories, some of these variations will be being driven by the fact that visitors for one journey purpose tend to have a different demographic profile to those in Britain for some other reason.

All that said, the following chart shows that there is a slight tendency for females to be more likely than males to go for a walk along the coast, with this observation being more acute for the 35-54 age groups.

Those most likely to say that they went for a walk along the coast were aged under 15 years, although it is interesting to note that about one-in-eight visitors aged 65+ undertook this activity.



Markets

The final chart looks at the propensity of visitors from many of our most important inbound markets to say that they went for a walk along the coast broken down for the three major journey purpose categories of holiday, business and visits to friends and relatives.

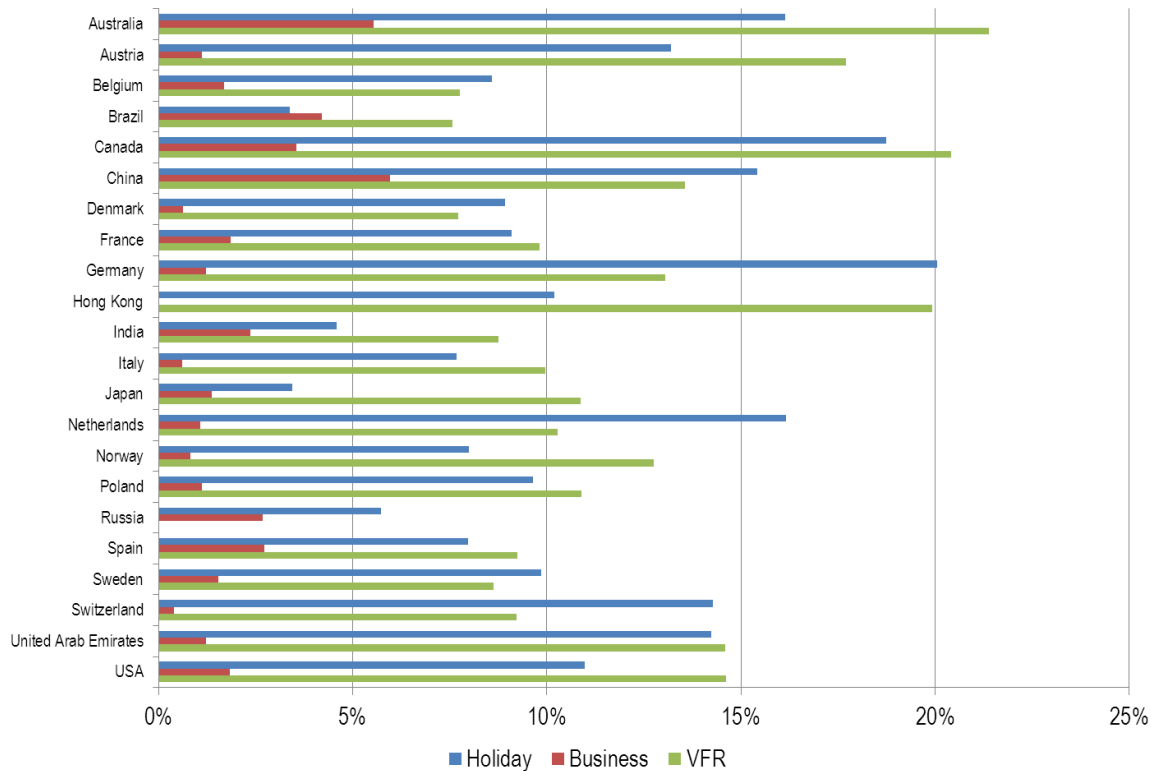
Among holiday visitors those from Germany are the most likely to enjoy a walk along the coast with one-in-five doing so, though holiday visitors from Canada, Netherlands and Australia were also inclined to ensure that the activity featured on their itinerary.

Holiday visitors from Brazil had the lowest propensity to walk along the coast (just 3% doing so), with those from Japan and India also being fairly unlikely to partake in the activity.

Not many business visitors said that they undertook the activity, but we can see that those from China and Australia had a higher tendency to do so than business visitors from other markets.

For a significant number of markets the journey purpose most closely associated with going for a walk along the coast is visiting friends and relatives, but even here there is marked variation from one market to another. More than a fifth of VFR visitors from Australia said that they had gone for a walk along the coast, hotly pursued by those from Canada. By contrast very few VFR visits from Brazil, Belgium and Denmark, and none at all from Russia, encompassed a walk along the coast.

Proportion of visits that includes walking by the coast



Where?

Although the IPS is only designed to be statistically robust at the national level it is possible to take a look at where visitors from different markets actually go within the UK once we accept a hefty health warning about the reliability of the figures due to the small sample sizes involved.

One insight that is worthy of a mention despite the caveats is that on average over the past five years the coastal counties of both Cornwall and East Sussex have attracted more than 70,000 German holidaymakers per annum, significantly more visitors than these counties attract from all other major markets, which tends to indicate that the possibility for coastal walks exerts a strong influence on where Germans choose to holiday in Britain.

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 2011. Source: ONS

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