

Student-linked Visiting Friends and Relatives (VFR) Traffic: Exploring the Customer Journey

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Report by

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Executive summary

Key findings, largely consistent with the earlier work both of Bischoff and Koenig-Lewis (2006) and the former English Tourism Council (ETC) (2002), relate specifically to (i) student-linked visiting friends and relatives (VFR) traffic, (ii) the customer journey, and (iii) future opportunities with respect to generating VFR traffic.

Student-linked VFR traffic:

- Student-linked VFR traffic meets the commonly accepted market segmentation criteria. It is: (i) definable; (ii) measurable; (iii) accessible; (iv) substantial; (v) congruent; and (vi) stable (Blythe, 2005).
- Students play a pivotal role in influencing VFR activity. They represent opinion leaders. Corroborating earlier research (Bischoff and Koenig-Lewis, 2006; ETC, 2002), this role was found to extend into five identifiable areas: (i) trip generation; (ii) accommodation selection; (iii) activity engagement; (iv) food and beverage selection; and (v) future/repeat business.
- 95% of respondents in this study were overnight visitors with 79% aged 16-34.
- 95% of respondents indicated VFR to be their main reason for visiting Liverpool.
- International VFR traffic and domestic VFR traffic were found to exhibit different travel patterns, and to foster different needs and aspirations. They represent two separate markets and should be acknowledged as such.
- International VFR traffic represented a sizeable share of student-linked VFR traffic. They are drawn from a wide destination base (20 countries in this study).
- In common with earlier research, grounds once again exist for disaggregating the VFR market. The VF ('Visiting Friends') and VR ('Visiting Relatives') markets exhibit different travel patterns and foster different needs and aspirations.
- Whilst student-linked VFR traffic frequents non-commercial accommodation, locality to one's host (rather than cost) was commonly identified to be the primary motive. Money saved on accommodation was invested in other parts of the local economy, with the service sector, restaurants, bars, theatres and exhibitions being particular beneficiaries.
- This traffic is not seasonally sensitive. The distribution of activity can be anticipated in relation to the structure of the academic year (September to September).
- Significant opportunities exist to increase international VFR traffic during holiday periods (Christmas in particular), as many international students remain in the region during these breaks.
- Significant opportunities also exist in relation to repeat business (in many cases, within the same academic year). The challenge is to seek ways to encourage this during the period of study and then look to extend this beyond this period. Open day-, graduation- and alumni-linked packages provide particular opportunities in this respect.

The customer journey:

General observations

- Respondents spoke highly of their Liverpool visit, shaking off preconceptions of a 'wet', 'run-down', and - in a number of cases - 'high crime' destination, in favour of a 'warm', 'friendly' and 'exciting' location which exceeded their expectations.
- Cultural differences were found to exist in the decision-making process. International visitors placed more reliance upon their hosts regarding decision-making, whilst domestic visitors were more inclined to negotiate trip itineraries with their host.
- Perceptions of Liverpool pre-visit were mixed, with international visitors voicing more favourable comments than domestic visitors.
- Access to Liverpool - although potentially costly to the international visitor (there are few direct flights to Liverpool John Lennon Airport beyond European destinations) - was favourably received.
- Taxi services were particularly favoured by international visitors who also utilised this transport as an information source.
- 98% of overnight visitors opted for Liverpool-based accommodation.
- Accommodation selection was influenced by the type of relationship (friend or relative) between the host and guest.

- Respondent visits were mainly limited to the most common tourist attractions, e.g., the Beatles Museum, the Albert Dock, the Anglican and Metropolitan cathedrals, the Maritime Museum, China Town and the Tate Gallery, this being influenced primarily by their student host.
- The services provided in the transport, accommodation and entertainment sectors were rated positively. There were, however, some negative comments too.
- Perceptions of Liverpool post-visit altered positively, particularly in the case of first-time visitors.
- The city's cultural offering, most commonly taken to include football, the Beatles, Matthew Street Festival and museums and galleries received praise once experienced.
- Most of the VFR traffic responded that they would re-visit Liverpool in the future.
- Suggestions as to how to encourage repeat business were made. These included: opening 24 hour shopping malls, improving the cleanliness of the city (streets, buildings and public facilities, and washrooms, in particular), reviewing the pricing of taxi journeys, and increasing the frequency of public transport (particularly during evenings, Sundays and Bank Holidays).

Recurring issues

- Perceptions of crime: A high level of crime-related apprehension was evident pre-visit. Respondents associated Liverpool with different forms of criminal activity (notably, theft and burglary) and anti-social behaviour, their perceptions influenced by not only the media, but also, disturbingly, by the student host. Whilst original judgements concerning crime were often favourably reviewed post-visit, many respondents had witnessed alcohol-related anti-social behaviour, particularly at weekends and in the evenings, which caused them concern and had resulted in them avoiding the city centre at those times perceived to be most risky.
- Access (including car parking), specifically within the city centre: This issue drew variable responses, with confusing signage and ongoing construction work identified as areas of contention.
- Early closing/reduced services: Limited shop and tourist attraction opening hours (closed by 5/6p.m daily) and reduced public transport services (at night-time, and on Sundays and Bank Holidays), both caused problems, particularly for those only on a short visit to the city.
- Environmental quality: Poor cleanliness (e.g., litter), lack of city centre 'open spaces', variable pedestrian routes, poor street lighting and derelict areas were each cited as areas where improvements to the visit experience could be made.

Future opportunities:

- The Higher Education (HE) sector presents significant opportunities for generating VFR traffic. Different markets exist: current students; graduation tourism; alumni tourism; and tourism linked with university open days. The limited data currently available which profiles these markets suggests scope for substantial further research, both of a quantitative and a qualitative nature.
- Similar to earlier quantitative work (Bischoff and Koenig-Lewis, 2006), this qualitative study has only focused upon one case study location, namely Liverpool. In effect, the study represents a pilot study. That said, this is a city typical of many university destinations, both in the UK and beyond. Consequently, the implications may also have a wider relevance to other HE locations. Further testing is necessary which, in part, will help to determine which implications are/are not destination-specific.
- The report concludes by outlining recommendations in a number of areas:
 - Influencing the decision to visit Liverpool;
 - Marketing strategies (general; overseas; marketing literature);
 - Travelling within the city;
 - Improving the city experience;
 - Accommodation schemes
 - Areas for further research (VFR; crime; sustainable tourism).

From these, **two priority areas for further work** can be identified:

- **The role of the student host as opinion leader;**
- **Perceptions of crime.**

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1. Introduction

1.1. Background to the study

This report presents the findings of a qualitative piece of research into the student-linked 'Visiting Friends and Relatives' (VFR) market undertaken in the spring of 2007 by MBA students based in the University of Liverpool Management School. The Higher Education (HE) student population (herein referred to as the student population) represents one economic community in many UK and international cities and towns. This community is varied, could conceivably be studying for three, four, or five or more years, and may even decide to remain or visit the locality post-graduation. It contains both home and international students and is growing in size and diversity. According to the Higher Education Statistics Agency (HESA, 2005), in 2004/05 the total number of HE students at UK institutions rose from 2,440,510 (2003/04) to 2,480,145, with international students (EU and non-EU) accounting for 10% of all first degree students, 40% of all taught postgraduates and 41% of all research postgraduates.

One interesting yet neglected feature of the student population is that it gives rise to tourism activity, particularly in the form of VFR traffic. Whilst the VFR market is commonly acknowledged as a category of tourism distinct from other categories such as holiday tourism and business tourism, it receives comparably less attention. ETC set about correcting this imbalance, attempting to dispel 'current myths about the VFR sector' (2002: 16) - namely, that it is a small, economically insignificant sector, that it is of no importance to accommodation providers, that it is comprised of trips made by those on lower incomes and in the lower social class grades, and that it is difficult to influence and contains few possibilities. They suggest instead that the VFR sector represents 'a lucrative sector for tourism with great potential' (*ibid.*: 1). Figures available confirm the growth of domestic VFR activity between 1995 (24.1 million) and 2001 (31.2 million), accounting for 24% of all domestic trips in 2001, second only to holiday tourism, a trend set to continue (49.6 million trips in 2006 (UKTS, 2006)). Additionally, just under a third of visits by overseas residents in 2005 were attributed to VFR (29%), representing the second most popular purpose of visit (National Statistics, 2006).

Studies which have explored the particular relationship between the student population and VFR traffic are few and far between. Recent work by Bischoff and Koenig-Lewis (2006) leads the way, providing quantitative evidence of the volume and value of student-linked VFR traffic based upon one case study location (Swansea) from the host (student) perspective. Drawing together earlier research - notably Brocx (2004), ETC (2002) and VisitBritain (2004) - these authors suggest that the student population has five key roles to play in relation to VFR traffic: (i) trip generation; (ii) influencing accommodation selection; (iii) influencing activity engagement; (iv) encouraging future/repeat business; and (v) spreading the tourism pound more widely by taking visitors 'off-the-beaten-track'. These, and other key findings, are questioned further in this study.

1.2. Research objectives

These are as follows:

- To identify existing data focused upon student-linked VFR traffic;
- To capture qualitative data on this segment, focusing particularly upon the VFR customer journey: (i) pre-visit, (ii) the travel experience, (iii) the accommodation experience, (iv) the visit experience, and (v) post-visit;
- To explore the cultural engagement of the VFR traffic;
- To make recommendations for improving the VFR experience;
- To identify opportunities to expand student-linked VFR traffic;
- To identify opportunities for future, related research.

1.3. Research methodology

The study was conducted in Liverpool, a UK city with a considerable student population of approximately 50,000 students between three universities: University of Liverpool, Liverpool John Moores University and Liverpool Hope University. Two sources of existing data influenced the research plan: the aforementioned quantitative study by Bischoff and Koenig-Lewis (2006); and studies undertaken by, or on behalf of, The Mersey Partnership (TMP) eg Destination Benchmarking (TMP, 2005) and North West Masters (England's Northwest Research Service for Tourism and Economic Development, 2006), reporting tourism activity, VFR traffic included. Working with TMP and Impacts 08 (a joint research initiative of the University of Liverpool and Liverpool John Moores University, evaluating the social, cultural, economic and environmental effects of Liverpool hosting the European Capital of Culture title in 2008), a qualitative approach to collecting data in the style of a destination report was developed with five specific stages of the experience determined: (i) pre-visit, (ii) the travel experience, (iii) the accommodation experience, (iv) the visit experience, (v) post-visit. This approach was originally introduced by Clawson and Knetsch (1966) and utilised more recently by Lane (2007).

A detailed semi-structured interview schedule covering profiling data and the five stages was developed, piloted and administered during the spring of 2007 to a total of 100 Liverpool-bound, student-linked VFR tourists. This study was not interested in quantifying the volume and value of this market (Bischoff and Koenig-Lewis's (2006) work provides evidence in this area), but rather it sought to glean in-depth comment upon the tourism experience for this sector, i.e., the customer journey from beginning to end. To facilitate this, respondents were invited to focus their responses upon one single visit. The more traditional approach of collecting data directly from the VFR market rather than from the host was also pursued. This proved a complex task and, in order to gain responses from both domestic and international visitors who were visiting students at different stages of their programme - undergraduate (years one through to completion) and postgraduate (taught and research) - stratified random sampling techniques were applied which relied also upon an element of snowballing.

2. Findings

Appendix 1 provides profile data for the respondents quoted in these findings.

2.1. Profile of respondents

Nearly two-thirds of the sample (64%) were male, the remainder (36%) being female. The majority were aged 16 to 24 (54%), followed by 25 to 34 (25%) and 45 to 54 (11%). The remaining 10% of respondents were split equally between the 35 to 44 and 55 to 64 age groups (i.e., with 5% each). Visitors in the main were either students themselves (59%) or were in paid employment (33% full-time, 2% part-time). The remainder were home-based, either caring for families (5%) or retired (1%). Interview duration varied considerably, ranging from 15 minutes to two hours, directly reflective of the method of data collection utilised - that is, face to face interview (51%), e-mail (35%) or telephone interview (14%).

These findings suggest student-linked VFR traffic and general VFR traffic differ in age profile. Citing UKTS (2003), Bischoff and Koenig-Lewis (2006) note that a quarter of all VFR trips (25%) are made by the over 55 age group (5% in this study), 22% by the 16 to 24 age group (54% in this study), 21% by the 25 to 34 year age group, 17% by the 35 to 44 age group and 15% by the 45 to 54 age group. Further testing is necessary, however, as, equally, these age profile differences may be a limitation of the sampling technique applied.

2.2. Characteristics of the visit

In order to collect meaningful data, respondents were invited to focus their responses primarily upon one specific VFR visit to Liverpool. For the majority of respondents (81%), a visit completed during the spring of 2007 provided the focus. For the remainder (19%), responses referred to a visit undertaken in the autumn/winter of 2006 (37% of this group during the Christmas 2006 vacation). All visits fell within the research window (the academic session 2006 to 2007).

Data was collected to correspond with pre-determined sampling criteria: visitors staying overnight were preferred; and an equal distribution of respondents visiting friends and visiting relatives were sought, along with an equal number of domestic and international responses. Consequently, 95% of respondents had visited Liverpool overnight, the remaining 5% being day visitors. 57% had visited friends, while 43% visited relatives. 51% were domestic visitors (see Table 1), and 49% were international visitors representing 20 different destinations (see Table 2). These destinations are broadly reflective of country of domicile data for international students available from HESA (2006), only France being absent in this dataset. The majority of respondents travelled alone (57%), a quarter with one adult (24%), and the remainder (19%) with two adults or more. Only one respondent travelled with children (two in this case), their purpose being to visit a relative. In two cases respondents travelled in large parties, one with six other adults, the other with eight other adults. Both were international visitors visiting friends, although the latter was only in Liverpool for a day visit.

Table 1: UK Domestic Respondents

Destinations represented	Number of respondents (Actual number count)
Northwest	7
Northeast	9
Southwest	3
Southeast	13
Central	7
Wales	5
Scotland	4
Unspecified	3

Source: Primary data

Table 2: International Respondents

Destinations represented	Number of respondents (Actual number count)
India	12
Pakistan	6
Greece	4
Malaysia	4
China	3
Germany	2
Hong Kong	2
Italy	2
Sweden	2
Taiwan	2
Japan; Nigeria; Oman; Republic of Ireland; Romania; South Africa; Spain; Sri Lanka; USA; Vietnam	1 (from each)

Source: Primary data

For the majority of respondents, this was their first visit to Liverpool (60%); the remaining 40% were 'repeaters', visiting on more than one occasion within the same academic year. Of this 40%, 28% had visited once before, 10% twice before, and 15% on three previous occasions. In all cases, visits fell between September 2006 to January 2007, a timing pattern reflecting the academic year. The remaining respondents (47%) had visited four times or more. Here the only discernable pattern related to the origin of the visitor - with the exception of two respondents (one drawn to the city for football reasons) - all were domestic visitors.

On first sight there appears to be a much lower incidence of repeat business attached to this study (40%) compared to the earlier general VFR work by ETC (2002) (in which the incidence of repeat business reached 85%). This is likely to be a reflection of question wording. This study asked respondents to comment only upon VFR traffic directly linked with the student population. Other VFR activity was automatically excluded. In

contrast, the ETC (2002) study did not define VFR parameters; all VFR activity was included. Consequently, the findings in this study actually indicate a *strong correlation between students and repeat business*.

3. Pre-visit

3.1. Reasons for visiting

According to the ETC (2002) study, 65% of VFR trips are primarily motivated by VFR activities. In this study the findings are even more closely linked to VFR activities, with 45% of respondents confirming that their visit was directly linked to visiting friends, and 50% of respondents linking their visit to seeing relatives. For the remaining 5% the VFR link was incidental: 1% were visiting Liverpool for a conference, 3% were visiting Liverpool in general, and the remaining 1% were pulled to the city for sport, notably football. In such cases, the opportunity to visit a friend or relative was considered to be an additional bonus. These findings provide evidence of the pull and leverage of the student in attracting this market.

3.2. Factors influencing the trip

In virtually all cases, respondents consulted their host in the trip planning stage. Exceptions to this were limited and related to particular circumstances, e.g., conference attendance and surprise (birthday) visits. Beyond this, respondents sourced information from the internet, tourist guidebooks and travel agents, these three sources particularly favoured by international visitors. Respondents frequently referred to online maps and resources such as the National Express website and Virgin Trains website, the Liverpool Capital of Culture 2008 website, and the University of Liverpool website.

Whilst published information was generally perceived to be of good quality, the visitors commonly - and at times exclusively - relied upon the information provided by their host: 'everywhere we went was recommended by our friend. They were very influential towards our decision, although we were given options of where we may enjoy' (Francis). Where the information was perceived to be inadequate, various suggestions for improvement were sought. Comments made included:

- The need to improve the quality and availability of information kiosks at the major points of entry to the city (Liverpool Lime Street railway station and National Express coach station being singled out);
- The need to make the city map more accessible;
- The need for tourism-related organisations (unspecified, but attractions, food and beverage, and the entertainment sector were inferred) to work more closely together to offer budget tour packages. (Respondents were largely ignorant of any existing packages available.) Also additional information should be uploaded onto websites, including up-to-date roadwork information, and additional advertisements should be placed on popular websites such as Google and youtube.com.

3.3. The role of culture

One particular feature of this study was to explore the role culture played in the respondents' decision to visit. In only two cases did respondents suggest culture to be the primary motivation for their visit, one commenting on their desire to enjoy 'a cross-cultural experience' (Lisa). For 26% of respondents culture played a secondary yet influential role in their visit plans, the principal reason summarised as follows by one domestic traveller visiting relatives: 'Liverpool is an upcoming City of Culture and I was interested to see what was on offer in museums, cinemas and galleries' (Larry). Cultural attributes of the city commonly singled out for mention included football, the Beatles, an interest in the European Capital of Culture programme, a theatre trip and visits to various (unspecified) sites. The remaining respondents (72%) attached no cultural significance to their visit, arguing instead that they were primarily focused upon visiting their friends and relatives, or, in one case, attending a conference. Even for this group, however, their visit did include cultural engagement, even if this was unintentional: 'I just wanted to visit my brother who happens to study at the University of Liverpool. During my stay with him I met his other friends who were from other countries and had a visit to the Maritime Museum, Albert Docks, city centre for shopping and did clubbing as well' (Andrew).

Interestingly, respondents appeared largely ignorant of the scope of culture, as the comments of both an international and domestic visitor indicate: 'I know from my daughter and friends that Liverpool is very popular for its football, not its culture' (Karen); 'Culture played no role for me. I visited for the New Year celebrations' (Francis). Ironically, culture itself also played an unrecognised yet significant role in modelling the whole VFR experience and illuminating differences between international and domestic traffic. International visitors frequently commented that they were only prepared to visit places recommended by their student friend/relative. Conversely, domestic visitors were more likely to negotiate their trip itinerary with their host, at times suggesting sites and attractions *they themselves* wished to visit. The student host has a powerful role to play. The significance of this role became even more evident through comments made relating to visitor perceptions of the city.

3.4. Perceptions pre-visit

When people were asked about their pre-visit perception of the destination, the reactions voiced were mixed. Significantly, perceptions were commonly attributed to the host population (students), which on the positive side represented the people of Liverpool as very kind and welcoming ambassadors of a friendly city. More detailed analysis highlights some key concerns however. International visitors rather than domestic visitors are more likely to see Liverpool as a good place to visit, harbouring few preconceived ideas about the destination. This group used terminology such as 'a serene and beautiful city', 'the birth place of the famous Beatles' and 'a city famous for its football'. In contrast, domestic tourists were more reticent to express such positive opinions, opinions which at times were polarised depending often upon where the visitor is from and which overlapped with concerns about crime.

Pre-visit perceptions of Liverpool's culture offering varied greatly among respondents. Some respondents expected the city to have a culture similar to that of other cities in the UK, others suggested that the city would have a different culture due the student population, and many failed to voice any cultural expectations of the city. Once again a lack of understanding as to what constitutes 'culture' was a key finding here. Opinions when offered were commonly linked to football, the Beatles, Matthew Street, museums and cathedrals, and, encouragingly, the Capital of Culture programme: 'Well, everybody knows of the Beatles and football in Liverpool (...) Liverpool is known for being rich in culture with lot of museums and cathedrals' (Lisa); 'well it must be cultured; they are hosting the Capital of Culture, aren't they?' (Laura).

3.5. Crime

Visitors' preconceived ideas were linked with crime-prompted apprehension. Both the domestic and international markets had similar views that the city has a very high incidence of crime and a reputation for being unsafe, particularly at night. Such perceptions manifested themselves through comments linked to anti-social behaviour, and a city with a football culture, a large working class population and a stereotypical image formed through media coverage. The following quotations illustrate common thinking here:

'I heard [about crime in the city] from my brother [student host] and knowing his and his friends experience during their stay in the city' (Andrew).

'Liverpool does have a reputation for being a dangerous city' (Cathy).

'I heard from my friend [student host] that it was not a very safe place and that they avoid going out at night alone' (Jane).

There are two dimensions to this perception. On the one hand, visitors arrive in Liverpool with a negative perception of the city. On the other hand, respondents chose to visit regardless of their preconceptions, an action which suggests the student-linked VFR consumer to be more robust than other market segments. (Literature exploring travel patterns and terrorist activity, for instance, provides a classic example of how fickle many tourism markets can be.) Inevitably, however, the unknown quantity in this is the number of people who have chosen not to visit or stay in the city as a consequence of such preconceptions. Further research is

needed to investigate ways of eradicating this misplaced perception. The findings do provide some direction in how to progress this, revealing the student host to be a key informant in this perceptual process (as evidenced by the quotations above).

4. Travel

4.1. Access to Liverpool

Access to Liverpool was a relatively straightforward affair and was well received in the main. Principal gateways to the city include the Liverpool John Lennon Airport, National Express coach station and Liverpool Lime Street railway station. Domestic visitors favoured land-based transport, with car, train and bus the order of preference. International visitor patterns were less clear-cut, dependent principally upon the place of origin; whilst Liverpool John Lennon Airport has grown dramatically in the last two decades, it primarily services the low cost airline sector who frequent largely EU, short haul destinations. Consequently, one feature of Liverpool international VFR traffic (student-linked and others) is that visitors are likely to have used at least two primary methods of transportation to reach the destination - air transport, plus one land-based form. This has implications for journey times, cost and may even present a psychological barrier. That said, those arriving from European destinations commented favourably upon the service received at the airport: 'I think that John Lennon Airport is a small one but efficient at the same time' (Frank).

4.2. Access within Liverpool

Signage was singled out as a weakness of travel to and within the city. University halls of residence faced particular criticism: 'We got lost and ended up circling around for half an hour (...) we couldn't find the residence' (Laura). This became less of an issue once in the city as the majority of respondents opted for walking, public transport and taxis where possible. Those relying upon their own transport were in the minority. Without exception all were domestic visitors. Taxis were particularly favoured by international visitors, many of whom commented on the security they provided. In addition, alongside map purchases (common amongst international, not domestic visitors), taxi drivers were utilised as a source of information, with the leisure activities of a number of respondents influenced through this encounter: 'generally they [taxi drivers] were friendly. One of them gave us directions and informed us about places to visit' (Carol). Domestic visitors were generally more self-sufficient and inclined towards walking or public transport options for getting around the city.

4.3. The travel experience

Whilst all respondents reacted positively to the friendly and warm nature of the Liverpool people, travel experiences varied, and this is one area which would benefit from further attention. Areas highlighted for consideration (often mentioned in the context of Liverpool Lime Street and the National Express coach station) included: the lack of cleanliness and overcrowding experienced at and on the local train services; noticeboards often being difficult to read due to dust, discoloration and poor lighting; litter strewn around (suggested to be a consequence of the lack of bins provided); the absence of an extensive metro network, limited night time bus services; high taxi tariffs and limited taxi availability at night; and a city under construction impacting upon the flow of traffic and parking. One recurring theme concerned anti-social behaviour, as comments articulated by Gaynor illustrate: 'there are so many young people behaving badly in the bus station and during the bus running, I am not feeling really safe [sic]'. Some of these issues are relatively straightforward to deal with, others less so.

5. Accommodation

The accommodation experience can be reviewed in two areas: accommodation trends (proximity to Liverpool; duration of stay; type of accommodation; reason for selection) and accommodation experience (including suggestions for improvement).

5.1. Accommodation trends

Encouragingly, 93% of respondents stayed in Liverpool, 2% close to Liverpool (both respondents visiting relatives), the remaining 5% on a day trip. Consistent with Bischoff and Koenig-Lewis's (2006) work (where the average duration of stay = 2.5 nights), nearly half the group stayed for two to three nights (49%) and a quarter for one night (26%). Of the remaining quarter (25%), 60% stayed for four to six nights, 20% for seven to ten nights and 20% for 11 plus nights. In common with the findings of Morrison *et al.* (2000), 22 out of the 25 respondents in this remaining quarter were international visitors. Corroborating Briggs' (2002) observation that VFR traffic in general tends to use friends' accommodation, the most popular type of accommodation utilised was indeed friends' accommodation (56%) and then relatives' accommodation (24%). Bed and breakfasts (11%) and hotels (9%) proved popular amongst the remaining visitors. Once again the student population played a pivotal role in recommending accommodation to their visitors: 'well, I stayed in a hotel as I couldn't stay with my daughter at her halls of residence. She recommended it to me' (Derek). Whilst this pattern of accommodation is to be expected with this consumer group, what is extremely significant is the *rationale* behind this choice and also the differences observed between the domestic and international market.

In justifying their accommodation selection, some respondents provided more than one reason for their choice. For those staying with friends and relatives (80%), the most popular reason given was in order to spend time with their host (49%), followed closely by the suggestion that it was the cheapest option (48%). Interestingly, however, 18% of respondents also commented that this was the most convenient location for them, the comments made by one visitor from India (who was visiting a friend) being representative of much of the thinking here: 'well, if you've made the journey over to see them then it makes sense to stay with them. You don't want to be taking time travelling around, that would be really unhelpful [sic]' (Anne). Other reasons provided for this accommodation choice included: being linked to an invitation to stay (1%); it offering a safe environment (1%); and it being the consequence of a last minute decision to travel (1%).

For those staying in commercial accommodation, their reasons were divided between the positive and the negative: some wanted to stay in such accommodation for comfort reasons (15%) and because of recommendation (10%), while others claimed they had to use such accommodation due to there being nowhere else to stay (10%) (5% of these respondents gave the reason that relatives' accommodation was too small). An underlying trend, not directly apparent through the quantitative data, is that domestic visitors tended to be influenced by cost and so choose friends and relatives accommodation because it is cheaper, whilst international visitors (who, as we have seen, are more likely to stay longer) choose friends and relatives accommodation for convenience in order to spend the maximum amount of time with their hosts. This presents an opportunity for the university accommodation sector in particular.

5.2. The accommodation experience

All respondents spoke favourably about this part of the visit. For those staying with friends and relatives, even limited space had little bearing upon the experience, the company compensating for this. Respondents staying in commercial accommodation were invited to comment in more detail upon the accommodation experience – the highlights and lowlights, the quality of the accommodation, the costs involved, and the sense of welcome received. These respondents were also encouraged to suggest how, if at all, this part of their visit could be improved. All respondents in this group confirmed that their accommodation met with their expectations ('the accommodation [B&B] was perfect and staff service was flawless' (Bert)), was of an appropriate standard with care given to customer needs ('very good hotel and very clean. Near to the city centre and employees were pleased to give information about their city' (Adam)) and, for international visitors, provided an exposure to British culture ('price was expensive but we had an exposure to British culture' (Eddie)), although this was not without its consequences ('these British when you drink you become noisy – the bar was very noisy, yes noisy bar [sic]' (Eddie)).

A recurrent theme linked to commercial accommodation related again to the desire to be close to the student host, to the extent that a number of respondents confirmed the cost of the accommodation was a secondary issue; their primary concern was location. The comments of one international visitor summarise much of the

thinking here: ‘the cost [hotel] is a little bit higher than other hotels I can choose but the most important thing is that it is near where my relative lives’ (Gary). This theme also arose within responses of those actually staying for free with friends and relative. Here a number of respondents indicated that they would be prepared to pay for their accommodation providing it was in the direct vicinity of their student host: ‘as students have a lot of visitors and space is a bit of an issue, spare rooms should be available [in halls of residence] (chargeable – but cheap) for the influx of friends and family or have affiliations with local hotels / bed and breakfasts for discounted accommodation for people visiting students’ (Francis). Information packs on accommodation facilities available alongside guidance on the general resources available in halls of residence (during term-time and out of term) were also highlighted as an opportunity for future development.

6. The visit experience

To capture a sense of the entire customer journey, respondents were encouraged to comment upon all parts of the visit experience.

6.1. Highlights

Entertainment, food and beverage, variety of shopping outlets, vibrant nightlife, friendliness of local people, value for money, and architectural elegance were all commonly cited as factors contributing to a positive visitor encounter:

‘Highlights, different kinds of cathedral, Albert Docks and enthusiasm for football and the Beatles’ (Carl).

‘Easy to find information, easy transport access, friendly people, a wide range of shopping, very kind to customers’ (Christopher).

‘Majority of people are approachable. Staff in attractions are helpful and good knowledge [sic] (...) not very expensive’ (David).

‘Good welcome, customer service in terms of the bus station counter person – very good, helped us to move around sensibly told us the cheapest way of getting around. Shopping experience was also good’ (Anne).

‘Yes, I think it has an unfair reputation. Some parts of the city were a lot more attractive than I thought (architecturally interesting Georgian terraces and pleasant squares). This type of thing isn’t often portrayed when discussing Liverpool’s image, the media don’t show this side of Liverpool. You need to go to Liverpool to see it’ (Briony).

This is important as these are the areas that ETC (2002: 29) found VFR traffic most likely to visit (restaurants, cafes, pubs, bars or nightlife coming at 68%, and shopping centres at 51%), suggesting satisfaction levels to be high where it particularly matters. Visits to the Beatles Museum, Albert Dock, Anglican and Metropolitan cathedrals, Maritime Museum, China Town and the Tate Gallery were all singled out as particularly positive parts of the visitor experience: ‘yes, I was also very impressed by the arts scene in the city and it certainly exceeded whatever expectations I may have had prior to coming’ (Larry). Significantly, however, few perceived this to represent a cultural journey.

Whilst not necessarily accompanying their visitor, the student host once again proved to be the information gatekeeper, suggesting places to visit, attractions to see, times to go, and food and beverage establishments worthy of a visit: ‘my friend told me that Albert Docks and the Museums were the only nice places to visit’ (Brian). The services provided in these places generally gathered positive comments and one of the highlights was the free entrance to most of these tourist attractions. In addition, one physically impaired visitor also commented on the favourable levels of access in the city in general. Transport and food and beverage were

the main areas of expenditure for this tourist group, with visitors (guided by their hosts) willing to try out a range of bars and restaurants, often off-the-beaten-track. Interestingly, visitors commented upon a greater willingness to spend in these areas than they might ordinarily, the reasons behind this being commonly acknowledged in a manner similar to that articulated by Lisa: 'Well I was staying with my daughter in her accommodation so I didn't have to spend out on that (...) I had more money to spend on holiday than I would usually have so it was great to be able to try out different restaurants and places with her, oh and also to treat her to some gifts from the Albert Dock'.

6.2. Suggestions for improvement

Poor cleanliness, road works, limited shop/attraction opening hours (generally closed by 5 or 6pm), a lack of city centre greenery and open spaces, variable pedestrian routes, reduced public transport on Sundays and public holidays, poor street lighting and derelict roads and buildings (particularly in the vicinity of the coach station), and concerns for personal safety were all highlighted as issues impacting upon the visitor experience:

'The cleanliness is not good enough. There is lots of rubbish on the road. The transport is quite convenient but not on Sundays' (Gina).

'Public toilets are badly maintained (...) People here are drunk' (Jake).

'The museum timings should be extended till 6:30 at the least; because everything shuts at 5pm it becomes hard to cover all the places in a day' (Cathy).

'Reduce the feeling of a city under construction. More functional pedestrian friendly streets without so many derelict buildings' (Maureen).

'Albert Dock should be linked by Metro from the city centre' (Diane).

One additional concern raised on a number of occasions related to Anfield Stadium. Visiting the Stadium, both its interior and its exterior, was popular with many visitors. Time and again respondents commented on the poor quality of the environment surrounding the Stadium; such comments referred to streets covered in litter, derelict and rundown properties, and witnessing anti-social behaviour to a degree that a number felt intimidated in this area and began to wonder if this was indeed more representative of 'Liverpool the city', than was the city centre.

7. Post-visit

7.1. Perceptions

Perceptions of Liverpool altered positively post-visit, particularly in relation to cultural sites and night-life. The majority of respondents spoke favourably about the city's cultural offering, whilst the welcome offered by the city itself received much praise:

'It is one of the most beautiful places in the UK I have been to. Nightlife here is very famous and it should be promoted well' (Adam).

'Before coming to Liverpool I thought it was a highly racist place but after staying here for 11 days my perceptions changed as people in Liverpool were extremely friendly and helpful' (Andrew).

'It's a lot bigger and more fun than I originally thought' (Ian).

For many, perceptions of crime remained post-visit, with international visitors particularly nervous:

'I saw many drunk and strange people in the streets over the weekend and I know that this kind of people causes problems' (Harriet).

'Too many drunken people walking around at night making foreigners feel uncomfortable' (Kevin).

'Nightlife in Liverpool is colourful and vibrant but walking on the street at night is a bit dangerous, especially for foreigners' (Karen).

That said, it is encouraging that the majority of respondents indicated they would consider re-visiting the city, with unexplored areas, large events (specifically music and sport) or even business occasions amongst the reasons cited for future visits. Visiting friends and relatives remained a constant focus for the majority of respondents, in many cases over-riding other concerns respondents held.

7.2. Repeat business

Repeat business, whilst a recognised feature of VFR traffic, remains poorly understood. As Seaton and Tagg's (1995) study of VR and VF traffic to Northern Ireland demonstrated, the way the market is segmented will influence the level and nature of repeat activity. Given the positive correlation between students and their repeating visitors found in this study, respondents were encouraged to indicate ways of increasing repeat business. Suggestions similar to those highlighted previously were noted: opening 24 hour shopping malls, improving the cleanliness of the city (streets, buildings and public facilities, and washrooms in particular), reviewing the pricing of taxi journeys, increasing the frequency of public transport (particularly during evenings, Sundays and Bank Holidays), and to increase the presence of police patrols in the city centre, particularly in the evenings and at weekends.

8. Conclusion

This study set out to explore the relationship between the student population and consequential VFR traffic. Often perceived to be a small, economically insignificant sector, core VFR traffic has traditionally been considered the poor relation of tourism research and attracted relatively little interest. Consequently, studies which do exist tend to focus upon the core segment; the needs of identifiable *sub-segments* have not been addressed to the same degree. However, some progress exploring the student-linked VFR sub-segment has been achieved (Bischoff and Koenig-Lewis, 2006). This has been quantitative in nature, profiling the volume and value of activity, and providing an important justification for further research.

Adopting a qualitative approach, this study set out to add to existing research by focusing upon the customer journey of this sector, particularly in relation to five areas: (i) pre-visit; (ii) the travel experience; (iii) the accommodation experience; (iv) the visit experience, and (v) post-visit. Through this approach, the earlier conclusions reached regarding the role of the student in VFR engagement have once again been confirmed. The student population were confirmed as opinion leaders, playing a pivotal role in many aspects of the associated VFR experience. They generated trips, influenced the selection of accommodation, influenced the activities pursued, encouraged visitors to try out food and beverage establishments which may not appear in mainstream tourism literature, and provided a magnet for repeat business. To a degree this is perhaps unsurprising. Students exercise an element of choice in their selection of university location; consequently, they are likely to make ideal ambassadors for their locality. What *is* surprising is the extent of this influence, along with the differences found to exist between domestic and international students and the differences between those visiting friends and those visiting relatives. This market presents destinations with tremendous opportunities. Recommendations on how to capitalise upon these opportunities, alongside exploring opportunities for future related research, form the final part of this report.

9. Recommendations

The following recommendations are offered in order to capitalise upon the student-linked VFR market and to improve their tourism experiences.

9.1. Influencing the decision to visit Liverpool

With regard to the customer journey: For many visitors, what they witness very much comes down to the interests, ideas and input of either the person they are visiting or, in the case of the international visitor, the taxi driver, and whether they suggest an event, a museum or a bar worth visiting. Targeting literature at the student and taxi community (e.g., travel information, accommodation information, the cultural attractions in Liverpool, special tours for VFRs, and budget packages) will help to capitalise upon this relationship. Friends and family will inevitably benefit from an informed point of view as to the 'where, what, why' of Liverpool as a city and as a cultural experience. In developing this material it is worth remembering that 79% of visitors in this study were aged 16 to 34 years old and that the needs of domestic and international visitors were often noticeably different. Additionally, the perceptions of Liverpool in relation to crime are worrying. Addressing this perception could also be a central feature of such a campaign.

9.2. Marketing strategies

9.2.1. General

Marketing strategies ought to differentiate the student population according to their year and level of study - i.e., undergraduate (first year, second year, etc.), postgraduate (Masters, PhD, etc.) - since the needs of friends and relatives traffic visiting first year students may be different to those visiting final year or postgraduate students. Indeed, targeting first year students might be especially fruitful as there is a high probability of repeat business. Furthermore, there is a need to differentiate between domestic and international travellers.

The introduction of student weekends or VFR weekends across the city could be one approach. Student weekends could be designed as 'taster weekends' whereby the tourism and hospitality sectors open their doors to students. The aim would be to try out facilities and services for free or at modest cost, in an attempt to encourage them to return at a later date with their guests. Given the evidence that students are opinion leaders, this is likely to prove an investment. VFR weekends could be timed to fall at the beginning/end of term or during particularly slack periods of business in the city. Again, special deals/packages could be developed for this particular market, e.g., a VFR passport including accommodation schemes, food and beverage promotions and attraction passes. This approach might encourage a wavering group to commit to the city – they are already likely to need to visit to drop-off or collect their host, and encouraging an overnight stay in the process is not unachievable. Such schemes might also have the added advantage of encouraging repeat business.

9.2.2. Overseas marketing

Patterns of migration point towards an increasingly diverse international student population today. In this study alone, friends and relatives visiting students are drawn from 20 destinations. Given the small numbers visiting from each, it would not be cost effective to market to all destinations. Instead, it is eminently more logical to market to the *source* of the traffic, the students themselves. International travellers represent a particularly lucrative market. Direct marketing initiatives targeting this group could be channelled through the international students' services within universities (ideally prior to arrival for study), and be prepared in a number of languages. Informing international students in this manner may well increase the frequency of visits by their respective VFR traffic, although monitoring of whether this transpires is also needed.

9.2.3. Marketing literature

VFR information packs could be developed which pull together key information sources reflecting each part of the customer journey. The feasibility of mailing out one simple summary sheet each year with student registration details pointing the student/visitor towards sources of information (e.g., www.visitliverpool.com;

www.tripadvisor.com; www.liverpool08.com; www.scoresonthedoors.org.uk) could be explored. Additional detailed information packs including package deals, offers, how to claim your visitor passport/travel card and so on, could be available at halls of residences, or through accommodation offices. Whilst most directly relevant to existing students, the summary sheet could also be sent out to those attending open days, alerting them to what Liverpool has to offer in general and how it accommodates VFR traffic in particular.

9.3. Travelling within the city

Domestic and international visitors exhibited different travel preferences once in Liverpool, the former being inclined to walk, the latter to take taxis. Both groups sought advice. An increased availability of (preferably free) up-to-date maps of Liverpool detailing the cultural attractions and different ways to get around, and highlighting areas where there are hazards (e.g., ongoing construction projects and road works) would be welcomed by this group, as would websites pulling together additional real time web-based information. Improvements to signage are also likely to reap long-term rewards. Discount travel cards, similar to those given to students, could also be explored in order to induce further use of public transport.

9.4. Improving the city experience

Alongside the designated weekends mentioned in 9.2.1, cultural attractions could also provide ad hoc discounts or other incentives (i.e., free gifts, discount vouchers which can be redeemed at other attractions and/or shopping centres, and special promotions) to students who bring in VFRs to visit them. This would induce more students to recommend particular attractions. Additionally, the issue of opening times for shops needs further debate within the Chamber of Commerce. Criticisms regarding city cleanliness are more difficult to deal with directly. Measures already in place (e.g., the new enforcement website operated by the City Council - www.liverpool.gov.uk/enforcement) need to be marketed more widely so that at the very least student awareness is raised and visitor concerns can be alleviated through explaining the action already being taken.

9.5. Accommodation schemes

Whilst the timing of VFR visits to the student population was not a feature of this study, ETC (2002) argues that although the general VFR market is not seasonally dependent, there is a slight concentration around school holidays and at Christmas time. It is worth remembering here that international students often stay in their university accommodation out of term too. It is likely that student vacations will offer a significant window for the international student-linked VFR market.

As student-linked VFR traffic also has the capacity to extend business into the shoulder periods, student accommodation (both student halls and private student accommodation) could provide schemes whereby unoccupied rooms could be booked by students for VFR traffic. Additionally, agreements with commercial accommodation providers nearby to student halls of residence could be investigated. Not only could this entice more business during the low season, but also it would increase the likelihood of the sector benefiting economically from this market segment.

9.6. Further research

9.6.1. Student-linked VFR traffic

This study, similar to the existing work by Bischoff and Koenig-Lewis (2006), represents a pilot study. It provides evidence of an identifiable market segment - student-linked VFR traffic - and makes some initial, and tentative, observations about the motivations, needs and aspirations of this segment. Further research is needed, of both a quantitative and qualitative nature, to corroborate these findings and, also, to take the debate forward. Areas which would benefit from particular investigation include:

- Extending the pilot study across other HE institutions (UK and beyond) in order to collect information from a larger data set on the volume and value of this tourism activity and the customer experience.
- Considering both host and guest perspectives.

- Exploring further the similarities and differences between the VF and the VR sub-sectors.
- Exploring the little understood areas of alumni- and graduation-linked tourism. Information detailing the volume, value, nature and characteristics of this tourism from both student and VFR perspectives is needed.
- Exploring the market for tourism activity linked with university open days.

9.6.2. Perceptions of crime

Respondents gave mixed responses over their perceptions of crime, perceptions formed in part by the media and also by student hosts. Evidence of nervousness existed pre-visit, feelings which improved post-visit but which were not eradicated, the international visitor being particularly anxious on this matter. Given the influential role of the student host, further research is needed targeting student perceptions of crime. Questioning what these perceptions are, how they are formed and how they can be improved for the better should provide a greater insight into students' concerns about crime and safety and allow progressive work to be undertaken in this area. Buy-in to this key project from interested organisations - the police, the university sector, and the tourism sector - will significantly enhance the chances of success.

9.6.3. Sustainable forms of tourism

An additional angle, beyond the scope of this work, is to explore the contribution of VFR traffic to the sustainable tourism debate. This traffic represents an existing audience, a tourist who is likely to have to visit regardless of pre-visit perceptions, or indeed what the destination has to offer, and one who is likely to return again. The destination is therefore not forced to provide anything additional, but rather can capitalise upon what it already has. At a time when the tourism industry is increasingly called to account for the carbon footprints it generates, the opportunities arising to consider this market through a sustainable tourism lens are considerable.

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12. Appendix: Profile of quoted respondents

Name (pseudonym)	Age	Domicile	Visiting Friends	Visiting Relatives
Adam	25-34	India	X	
Andrew	25-34	Pakistan		X
Anne	16-24	India	X	
Bert	16-24	London	X	
Brian	25-34	Pakistan	X	
Briony	16-24	Nottingham	X	
Carl	25-34	China		X
Carol	45-54	Greece		X
Cathy	25-34	London	X	
Christopher	16-24	Bristol	X	
Daisy	25-34	London	X	
David	25-34	China	X	
Derek	55-64	Nigeria		X
Diane	25-34	Oman	X	
Eddie	55-64	Greece		X
Francis	16-24	Birmingham	X	
Frank	55-64	Italy		X
Gary	45-54	Taiwan		X
Gaynor	16-24	China	X	
Gina	16-24	China	X	
Harriet	45-54	Italy		X
Ian	25-34	Vietnam	X	
Jake	16-24	Malaysia	X	
Jane	45-54	London		X
Karen	45-54	Malaysia		X
Kevin	16-24	Greece	X	
Larry	16-24	Tunbridge Wells		X
Laura	45-54	London		X
Lisa	55-64	Newcastle-under-Lyme		X
Maureen	45-54	Tunbridge Wells		X

Source: primary data