

Discover England: summary insights on overseas visitors to England's regions

Gateways report: a profile of overseas visitors using our airports, ports and rail termini

November 2016

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Introduction

Background

The three-year £40million Discover England Fund was announced by the Government last year, with the objective of ensuring that England stays competitive in the rapidly growing global tourism industry, by offering world-class English tourism products to the right customers at the right time. The fund will be awarded to external bidders, with awards for two blocks of projects.

It is vital that funding is awarded to bids which are in line with consumer and business trends, and to this end, the fund will also support additional research, to ensure that project teams and potential bidders have access to relevant market intelligence. The research will include the delivery of both broad insights (that is, with potential relevance to any project) and research into specific areas.

In considering the types of research relevant for the Discover England Fund, it became evident that much of the information that bidders might require is actually already in existence. This includes information on the VisitBritain Insights pages, the dataset from the International Passenger Survey, other research carried out in the past by VisitBritain, or other secondary data sources.

For these reasons, VisitEngland have commissioned BDRC Continental undertake a substantial programme of tailored secondary research to ensure that bidders can easily access and use existing market intelligence to shape both year 1 and years 2-3 projects. The focus of this programme is the international consumer – while the fund is also intended to stimulate domestic tourism, bids must in the first instance demonstrate their potential to generate growth from inbound markets – and therefore all analysis should be focused on inbound markets.

This report focuses upon understanding gateways – how inbound visitors, particularly holiday visitors, vary by gateway region, gateway mode (air, sea, rail) and individual gateway and what their regional visiting behaviour is once in the country.

About this report

There is a large and diverse range of data available on overseas visitors to the UK. The data in this report is drawn solely from the International Passenger Survey (IPS), which includes a combination of publically available raw data and the insights generated by VisitBritain in their dedicated reports. The IPS is rich in data on gateways for overseas visitors to the UK, with fieldwork undertaken across all significant international airports, ports and rail termini across the UK.

This report aims to draw upon the most up-to-date research available. Given the requirement to present results at individual gateway level, **IPS data has been combined for 2013, 2014 and 2015** so that sample sizes for the smaller regional gateways remain robust. Unweighted sample sizes for each of the gateways are presented overleaf.

Although the report focuses upon holiday visitors to England's regions and regional gateways (and how these relate to the London gateways), we have also included analysis of Scotland, Wales and Northern Ireland gateways where relevant. This recognises the role that gateways in these nations play in driving visits to England and its regions as well as the role of England's gateways in driving visits to these nations.

The report refers to 'target markets'. These are France, Germany, USA, Spain, Italy, Netherlands, Australia, The Nordics (Sweden, Norway, Denmark, Finland and Iceland) and China. Markets have been chosen due to their current high volume of visits to England, or (as is the case with China) their potential to visit England in the future.

Gateways – definitions

1. Gateway Region	Gateways
London	All London airports (see Gateway Mode below), Eurostar
Scotland	Edinburgh Airport, Glasgow Airport, Aberdeen Airport, Prestwick Airport
Wales	Cardiff Airport, Pembroke Port, Fishguard Port, Holyhead Port
N.Ireland	Belfast Airport
South East	Southampton Airport, Dover Port, Folkestone Port, Southampton Port, Portsmouth Port, Other SE Ports
South West	Bristol Airport, Bournemouth Airport
East	Harwich Port, Other East Ports
West Midlands	Birmingham Airport
North West	Manchester Airport, Liverpool Airport
North East	Newcastle Airport, North East Ports

N.B. Throughout this report, the term ‘regional gateways’ refers to all gateways in England (where IPS interviewing takes place), excluding London. The term ‘Regional England’ refers to all regions of England, excluding London

2. Gateway Mode	Gateways
London airport	Heathrow, Gatwick, Stansted, Luton, London City
England regional airport	Manchester, Birmingham, Bournemouth, Bristol, East Midlands, Leeds/Bradford, Liverpool, Newcastle, Southampton, Doncaster
England seaport	Dover, Folkestone, Southampton, Portsmouth, Other SE ports, Harwich, East ports, NE ports
Rail	Eurotunnel, Eurostar

Gateways – approximate share of overseas visit volumes

Combined 2013, 2014, 2015 overseas visit volume share by gateway region, gateway mode and individual gateway:

1. Gateway Region	All UK Visitors	UK Holiday Visitors	2. Gateway Mode	All UK Visitors	UK Holiday Visitors	3. Individual Gateway	All UK Visitors	UK Holiday Visitors
London	63%	66%	London airport	55%	54%	Eurostar	8%	12%
Scotland	5%	6%	England regional airport	13%	6%	Manchester Airport	5%	2%
Wales	2%	2%	England seaport	12%	14%	Liverpool Airport	1%	1%
N.Ireland	<0.5%	<0.5%	Rail	13%	18%	Birmingham Airport	3%	1%
South East	16%	18%				Newcastle Airport	1%	<0.5%
South West	2%	1%				Bristol Airport	1%	1%
East	1%	1%				Heathrow Airport	26%	23%
West Midlands	3%	1%				Gatwick Airport	12%	13%
North West	6%	3%				Stansted Airport	11%	14%
North East	1%	2%				Luton Airport	4%	2%
East Midlands	1%	<0.5%				East Midlands Airport	1%	<0.5%
Yorkshire	1%	<0.5%				Leeds/Bradford Airport	1%	<0.5%

N.B. East Midlands / Yorkshire gateway regions and East Midlands / Leeds-Bradford Airports are not shown separately within this report due to low sample sizes among holiday visitors, although they are included within 'Regional England' data

Gateways – sample sizes

Combined 2013, 2014, 2015 sample sizes for the IPS by gateway region, gateway mode and individual gateway:

1. Gateway Region	All UK Visitors	UK Holiday Visitors
London	91,912	32,331
Scotland	4,017	1,503
Wales	1,828	673
N.Ireland	423	113
South East	14,715	6,514
South West	2,698	602
East	940	570
West Midlands	538	527
North West	9,767	1,805
North East	4,217	2,569
East Midlands	244	24
Yorkshire	538	55

2. Gateway Mode	All UK Visitors	UK Holiday Visitors
London airport	86,580	29,402
England regional airport	18,075	3,246
England seaport	13,722	6,746
Rail	10,745	5,756

3. Individual Gateway	All UK Visitors	UK Holiday Visitors
Eurostar	5,332	2,929
Manchester Airport	8,551	1,482
Liverpool Airport	1,216	323
Birmingham Airport	3,745	527
Newcastle Airport	575	165
Bristol Airport	2,554	575
Heathrow Airport	59,230	18,677
Gatwick Airport	11,110	4,394
Stansted Airport	10,892	4,959
Luton Airport	4,394	1,126
East Midlands Airport	244	24
Leeds/Bradford Airport	409	52

N.B. East Midlands / Yorkshire gateway regions and East Midlands / Leeds-Bradford Airports are not shown separately within this report due to low sample sizes among holiday visitors, although they are included within 'Regional England' data

Executive summary

Executive summary/1

How does purpose of visit vary by gateway?

- Visitors using London's gateways are more likely to be visiting for holiday purposes (41%) than those using England's regional gateways (34%)
- However there are some exceptions to this, with visitors using regional gateways in the eastern half of England all recording high proportions of holiday visitors – East (63%), North East (49%) and South East (43%)
- In terms of gateway mode, England's seaports and rail termini record the largest proportions of holiday visits, nights and spend relative to other travel purposes
- Conversely, England's regional airports have a relatively low holiday component, accounting for only 18% of visits compared with 39% at UK gateways overall. These regional airports are much more likely to be used by those travelling to visit friends / relatives and, to a lesser extent, those studying
- Birmingham and Manchester airports, in particular, generate relatively low proportions of holiday visitors
- Of the major England gateways, Eurostar (57%) has comfortably the highest proportion of its visitors travelling for holiday purposes. Stansted (48%), Gatwick (48%) and to a lesser extent, Heathrow (35%) also record a higher than average proportion of holiday visitors
- England's regional gateways have a higher representation of business visits (30%) flowing through them than London's gateways (22%), with the West Midlands – Birmingham Airport (41%) – and South East (35%) gateways recording particularly high proportions of business visits

Executive summary/2

Which regions are stayed in on holiday and how do they vary by gateway?

- Only 64% of holiday visitors using England's regional gateways (so excluding London) spend a night in Regional England. Of the remaining visitors, 30% only stay in London, 3% only stay in Scotland and 2% only stay in Wales.
- Only 18% of holiday visitors using a London gateway spend at least one night in Regional England - primarily the South East (8%)
- 80% of holiday visitors using a London gateway ONLY stay in London on their trip. 9% stay at least one night in both London and elsewhere in the UK
- Of the London airports, Heathrow records the highest proportion of holiday visitors who stay at least one night in Regional England (and least likely to stay ONLY in London), although this is primarily in the South East or South West
- Only 10% of holiday visitors using Eurostar stay in Regional England. Although 44% of Eurostar holiday visitors are from long haul markets, many are on pan-European trips and spending only a small number of nights in the UK – usually London only
- Those using the South East and East gateways for holiday purposes are frequently using these as a route to London:
 - Among those using South East gateways, 48% stay in London and only 55% stay in Regional England
 - Among those using the East gateways, 55% stay in London and only 47% stay in Regional England
- The South West, West Midlands and North West are more likely to retain those using their gateways, with 86%, 92% and 96% of holiday visitors using these gateways respectively, staying at least one night in Regional England – although not always staying in the gateway region
- Among holiday visitors using the North East gateways there is notable travel into Scotland, with 53% spending at least one night there and only 59% staying in England
- The role of Scotland and especially Wales as gateways to staying in England should be recognised. 78% of holiday visitors using Wales gateways (primarily the ports of Fishguard, Pembroke and Holyhead) spend at least one night in England whilst the figure is 10% among those using Scotland's gateways – mainly Glasgow and Edinburgh airports

Executive summary/3

What is the origin of holiday visitors and how do they vary by gateway?

- Holiday visitors using London's gateways are significantly more likely to attract longer haul visitors (13% North America, 22% other non-European) than those using England's regional gateways (4% North America, 10% other non-European)
- Gateways in the South East, South West and North East are particularly likely to be limited to visitors from Europe
- England's seaports are dominated by holiday visitors from Europe (89%) – especially Germany (27%), France (25%) and the Netherlands (16%), with England's regional airports also more likely to see holiday visitors from Europe than gateways across the UK overall
- Some of England's regional gateways are characterised by visitors from a small range of source markets, particularly the seaports e.g. those from the Netherlands represent 44% of holiday visitors using gateways in the East
- In terms of spend, London (driven by Heathrow and to a lesser extent, Eurostar), West Midlands and North West gateways record significantly higher proportions of holiday spend among visitors from the long haul markets than England's other regional gateways
- The other three principal London airports – Gatwick, Stansted and Luton – and most other regional airports in England are dominated by European holiday visitors. However, each of Birmingham, Manchester and Newcastle airports have significant minorities of holiday visitors from Rest of the World long haul markets (excluding North America)
- There is a high proportion of visits, nights and spend accounted for by the North American market among holiday visitors using gateways in Scotland

Executive summary/4

How else do holiday visitors vary by gateway?

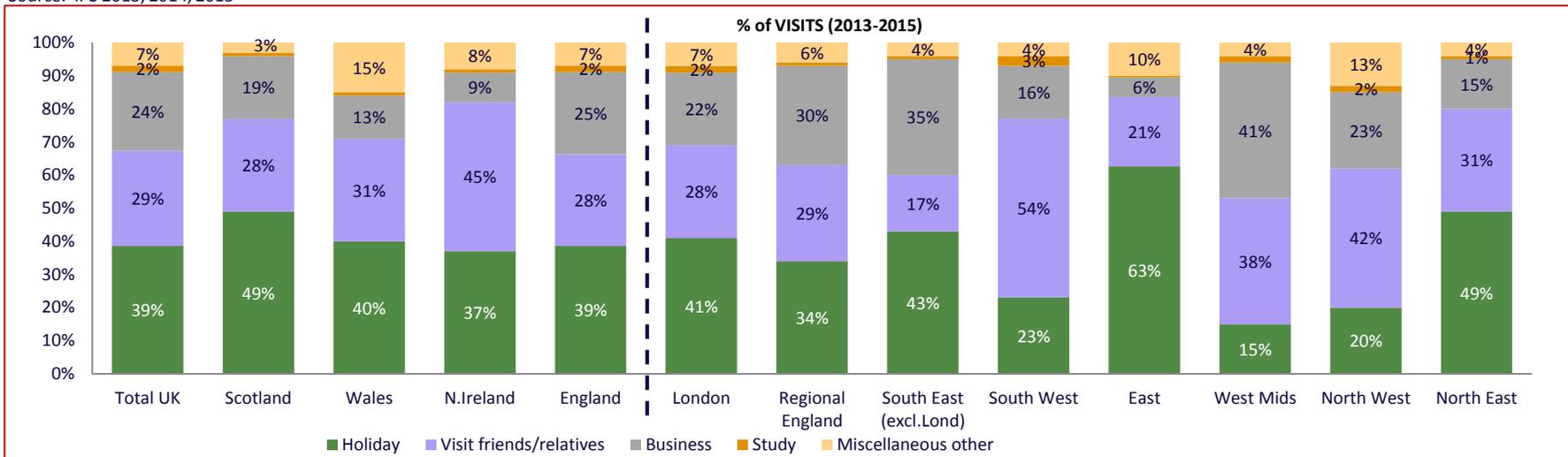
- Holiday visitors who use England's regional gateways are more likely to visit during the April-June period (36%) than those using London gateways (28%). This is driven by holiday visitors using England's seaports
- Holiday visitors using the South West, West Midlands and North East gateways have a strong July-September skew, driven by the regional airports
- Other than London, the North West gateway region shows the greatest seasonal spread of holiday visitors
- Those using the London, East and South East gateways have the shortest lengths of stay, while those using gateways in the North East, North West and South West are most likely to be staying for longer than 7 nights
- Holiday visitors using England's regional airports typically have the longest stay (especially Manchester Airport) while those using rail gateways record the shortest stay length – especially those using Eurostar
- England's seaports record 49% of holiday visitors as being on a package holiday, which includes both travel and accommodation. This is significantly higher than for London airports (9%), regional airports (9%) or Eurostar (17%), although Eurotunnel is also notable for its high proportion of package holiday visitors
- Holiday visitors using London's gateways are most likely to be aged under 55 years – particularly aged 35-54 years. Those using gateways in the East and Wales tend to be much older, both with high proportions aged 55 or over – reflecting the dominance of seaport gateways in these regions
- Those using the North West gateways are most likely to be from the youngest 16-34 year old age group

How does purpose of visit vary by gateway?

Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015

Trip purpose by gateway region (visits)

Source: IPS 2013, 2014, 2015



N.B. East Midlands and Yorkshire regions too small sample sizes to show separately, but included within Regional England

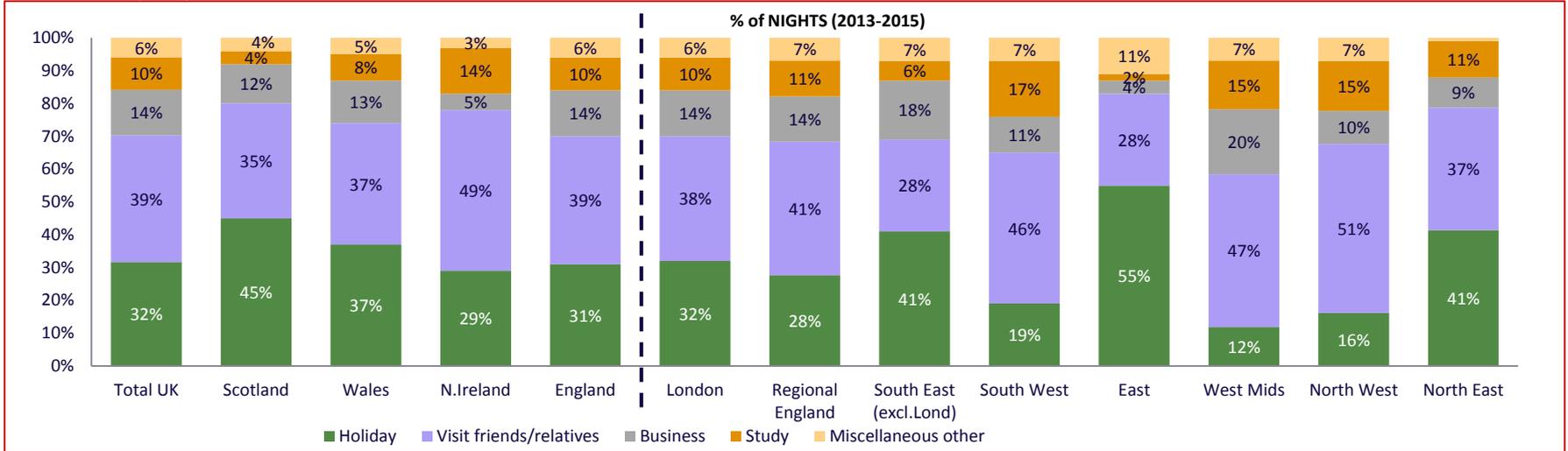
In terms of visits, 39% of overseas visits to the UK are for holiday purposes compared with 29% for visiting friends/relatives, 24% for business and 9% for other reasons (including 2% for study purposes).

This varies by gateway into the UK. For example, those using a Scottish gateway are much more likely to be visiting for holiday purposes (49%).

Although there are some England regions with high proportions of their visitors using their gateways for holiday purposes – notably the East, North East and South East – visitors using London gateways are more likely to be holiday visitors (41%) than visitors using England’s regional gateways (34%). Conversely, England’s regions (30%) have a higher representation of business visits flowing through its gateways than London (22%), with the West Midlands (41%) and South East (35%) gateways recording particularly high proportions of these business visits.

Trip purpose by gateway region (nights)

Source: IPS 2013, 2014, 2015



N.B. East Midlands and Yorkshire regions too small sample sizes to show separately, but included within Regional England

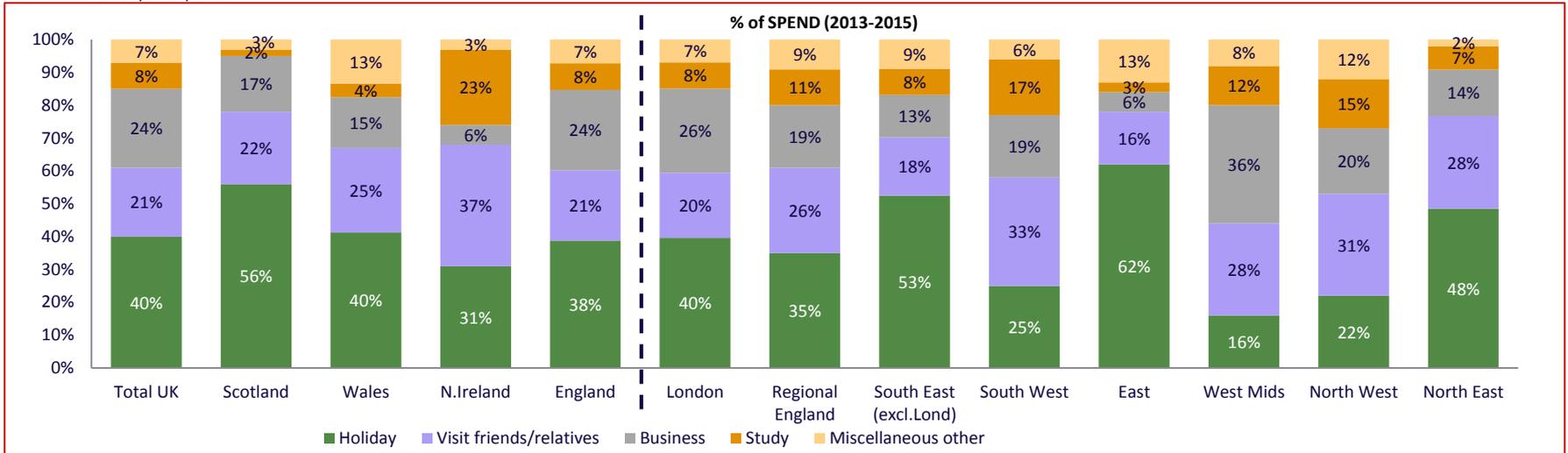
In terms of nights spent away from home, the proportion of holiday nights in the UK is slightly lower than for holiday visits (32% of nights vs. 39% of visits). With their much shorter average length of stay, business nights have a much lower representation than business visits (14% nights, 24% visits).

Conversely, in terms of nights, those visiting friends/relatives (39% nights, 29% visits) and those visiting for study purposes (10% nights, 2% visits) are both much more strongly represented.

The pattern of holiday night variation by gateway region is similar to that of visits. However, the gap between those using London gateways and England’s regional gateways in terms of holiday nights is narrower than for visits. For London’s gateways, 32% of nights are for holiday purposes compared with 28% for England’s regional gateways. This is primarily explained by the much shorter business trip length of those using the regional gateways rather than any difference in holiday trip length between those using regional gateways or London.

Trip purpose by gateway region (spend)

Source: IPS 2013, 2014, 2015



N.B. East Midlands and Yorkshire regions too small sample sizes to show separately, but included within Regional England

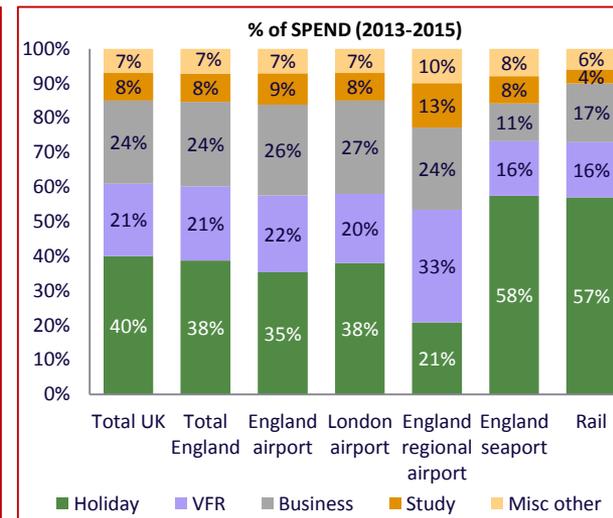
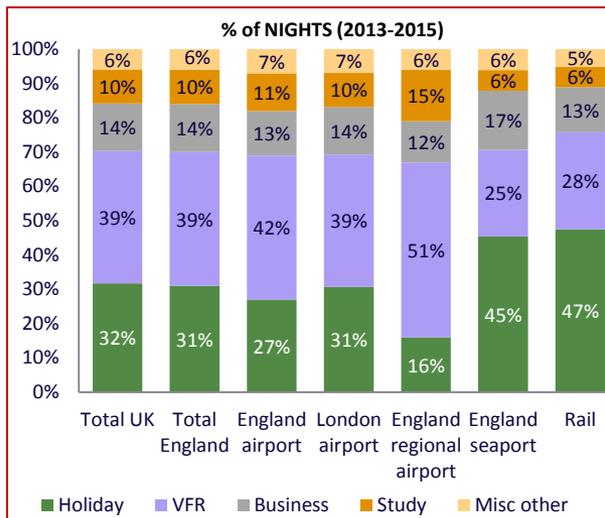
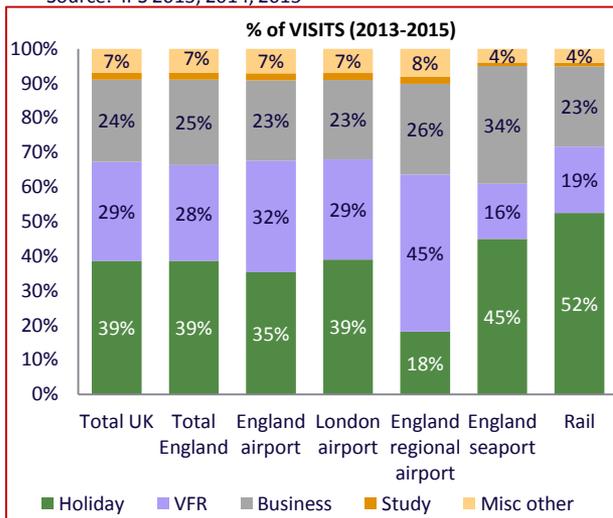
Trip purpose to the UK in terms of spend during the visit correlates strongly with visits when looking at holiday (40% spend, 39% visits) and business visitors (24% spend, 24% visits). However, the representation of those visiting friends/relatives is much lower in terms of spend (21%) than for either visits (29%) or nights (39%).

Of note is the large proportion of spend by those visiting for study purposes using each of the South West (17%), North West (15%), West Midlands (12%) and South East (11%) regional gateways.

As with visits and nights away, spend is much more likely to be for holiday purposes among those using the regional gateways in the eastern half of England – so South East (53%), East (62%) and North East (48%).

Trip purpose by England gateway mode (visits, nights and spend)

Source: IPS 2013, 2014, 2015



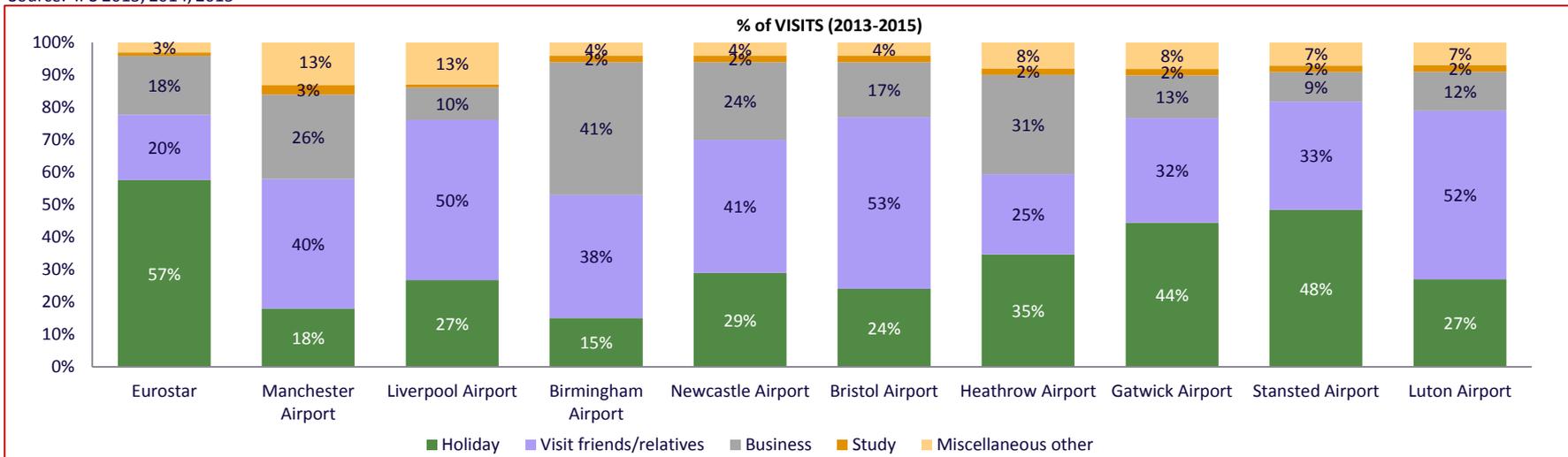
In terms of gateway mode, England’s seaports and rail termini record the largest proportions of holiday visits, nights and in particular, spend.

Conversely, England’s regional airports have a relatively small holiday component – accounting for only 18% of visits, 16% of nights and 21% of spend compared with over 30% at UK gateways overall. England’s regional airports are much more likely to be populated by those travelling to visit friends/relatives (45% of trips vs. only 29% among UK gateways overall) and to a lesser extent, those studying.

Although business visits are well represented at England’s seaports, spend is low given the much shorter trip length and nature – much of the traffic accounted for by freight.

Trip purpose by individual England gateway (visits)

Source: IPS 2013, 2014, 2015



Looking at individual gateways, Eurostar (57%) has comfortably the highest proportion of holiday visitors. Stansted Airport (48%), Gatwick Airport (48%) and to a lesser extent, Heathrow Airport (35%) also record a higher than average proportion of holiday visitors.

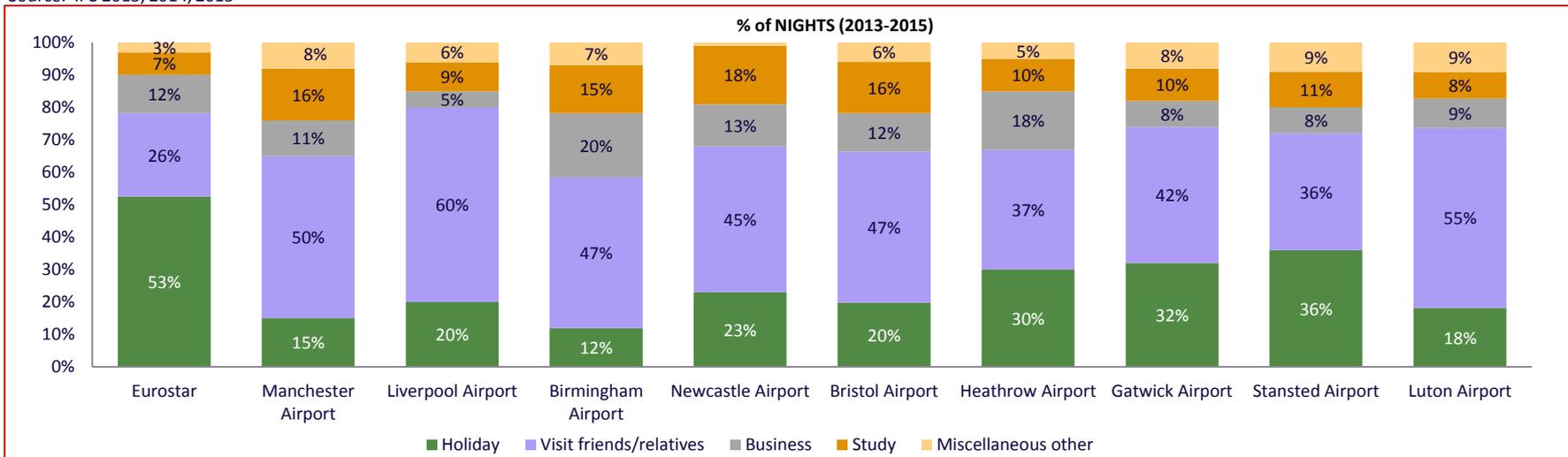
Conversely, England's regional airports tend to generate relatively low proportions of holiday visitors, particularly:

- Birmingham Airport – 41% of visits are for business purposes
- Manchester Airport – 40% of visits are to visit friends/relatives and 26% for business purposes

Luton Airport also generates a high proportion of those visiting friends/relatives (52%) compared with UK gateways overall (29%).

Trip purpose by individual England gateway (nights)

Source: IPS 2013, 2014, 2015

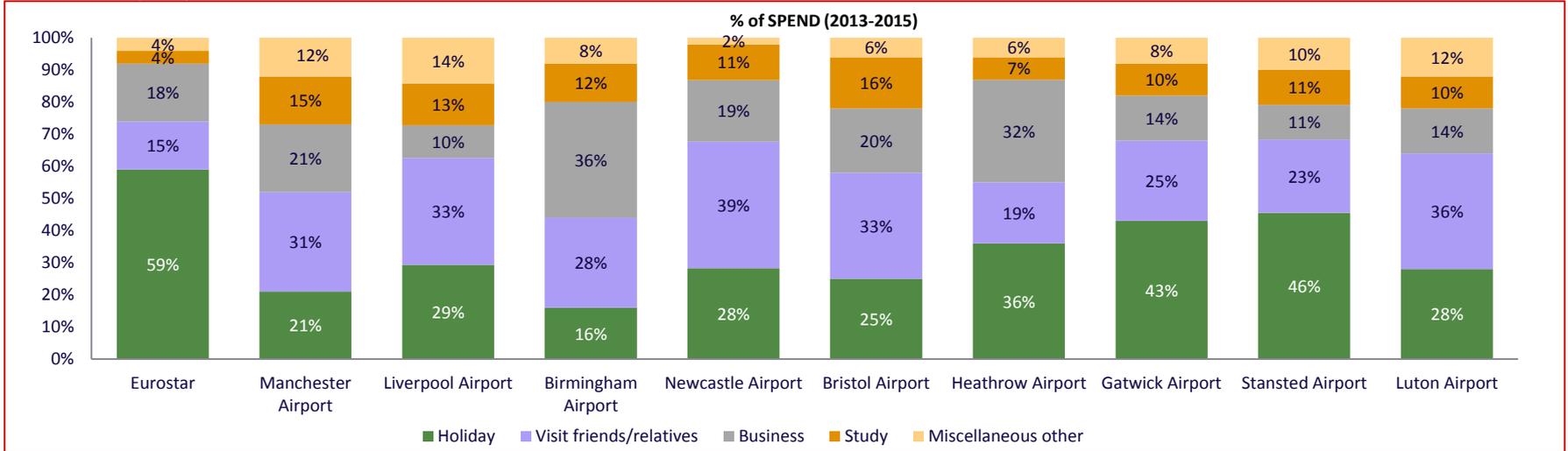


In terms of nights spent in the UK, the difference between Eurostar and the other major gateways in terms of representation of those on a holiday trip is even greater. 53% of nights are accounted for by those visiting for holiday purposes compared with only 32% for UK gateways overall. Eurostar is well represented by long haul holiday travellers from outside Europe staying in the UK for longer periods.

As with visits, Heathrow, Gatwick and Stansted airports are all well represented in terms of holiday nights spent in the UK. Birmingham Airport records the highest proportion of nights spent for business purposes – 20% compared with 14% for UK gateways overall.

Trip purpose by individual England gateway (spend)

Source: IPS 2013, 2014, 2015



Although spend accounted for by holiday visitors is also the highest proportion for Eurostar, the gap between this gateway and Gatwick / Stansted airports is narrower. This reflects both the higher average per night spend of those using Gatwick / Stansted for holiday purposes and also the higher average per night spend of those using Eurostar for business purposes. Heathrow records a relatively low proportion of holiday spend compared with nights because of its exceptionally high level of per night spend by its business visitors.

Again, visiting friends / relatives spend and spend by those visiting for study purposes tends to be a higher proportion of all spend among those using regional airports. Birmingham Airport is the main exception, with its high proportion of spend by business visitors.

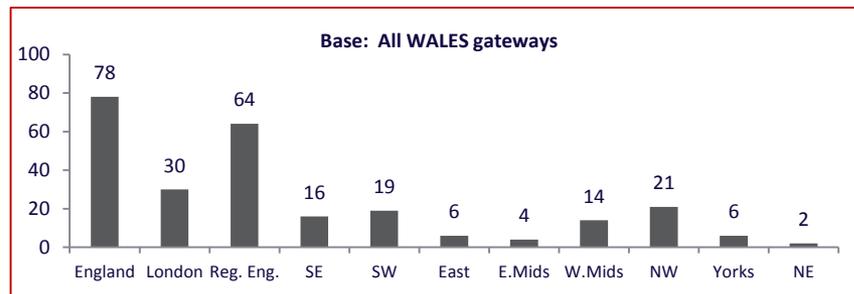
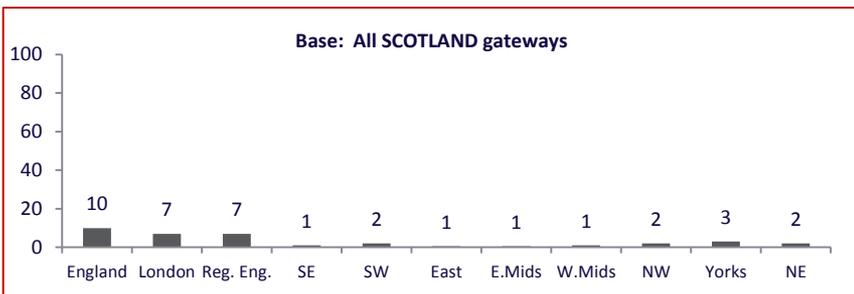
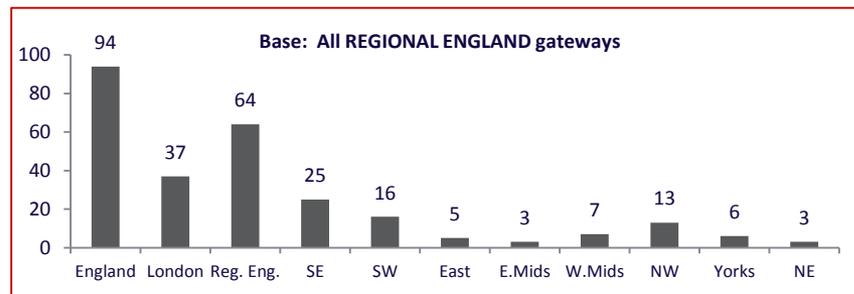
Which regions are stayed in on holiday and how do they vary by gateway?

Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015

N.B. Data in the following charts are based on those staying at least one night in the UK. The final chart in the section looks at how 'nil night' stays varies by gateway.

Regions stayed in by UK holiday visitors – by gateway region (visits) / 1

Source: IPS 2013-2015



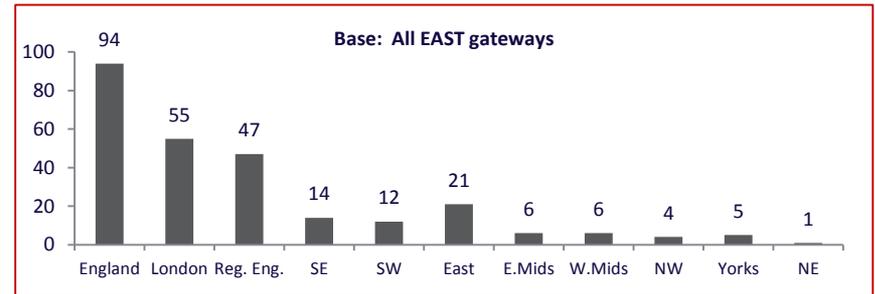
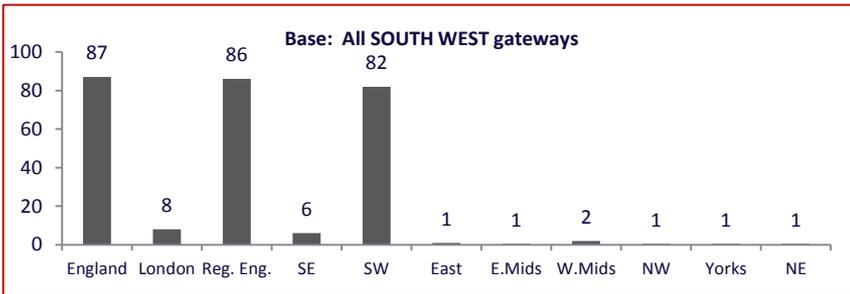
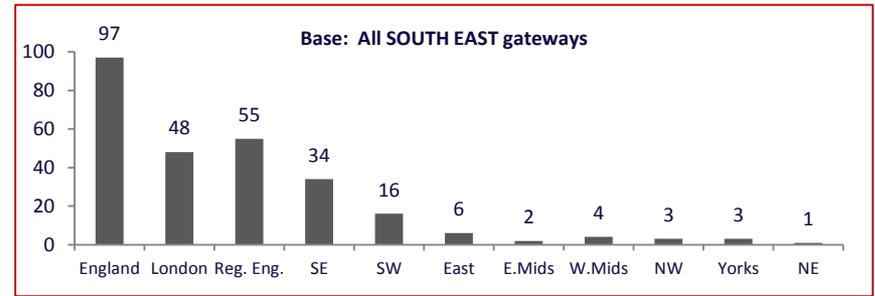
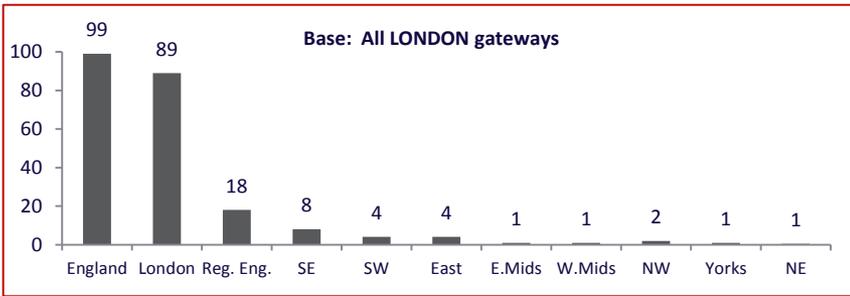
97% of holiday visitors using gateways in England spend at least one night in England. A further 5% of holiday visitors using England’s gateways spend at least one night in Scotland, 2% in Wales and <0.5% in Northern Ireland.

Conversely, airports and ports in Scotland and in particular, Wales, are used as gateways to stays in England. Whilst small in Scotland (only 10% of those using Scotland’s gateways stay in England for at least one night), this is more significant in Wales. 78% of those using Wales gateways spend at least one night in England, with 30% staying in London and 64% in Regional England (21% in the North West, 19% in the South West and 16% in the South East). This traffic is primarily generated by the ports of Holyhead, Fishguard and Pembroke.

Those using England’s regional gateways frequently do not spend a night in regional England – only 64% currently do so. Of the remaining visitors using regional gateways, 30% only stay in London, 3% only stay in Scotland and 5% only stay in Wales.

Regions stayed in by UK holiday visitors – by gateway region (visits) / 2

Source: IPS 2013-2015



89% of holiday visitors using a London gateway spend at least one night in London.

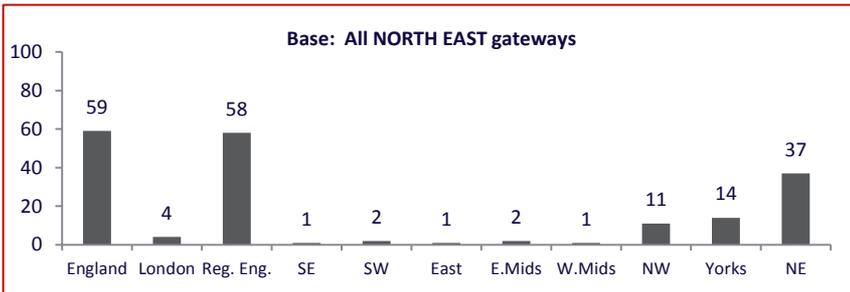
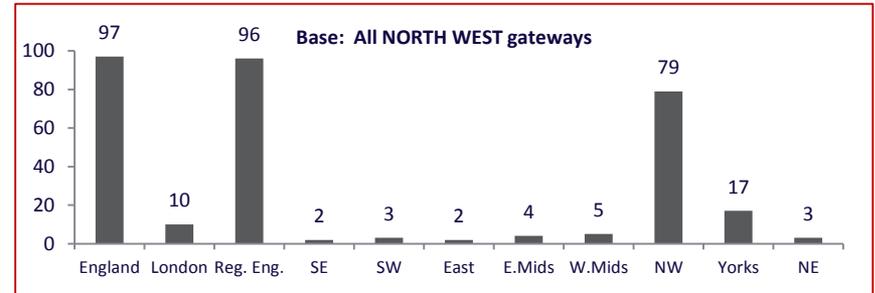
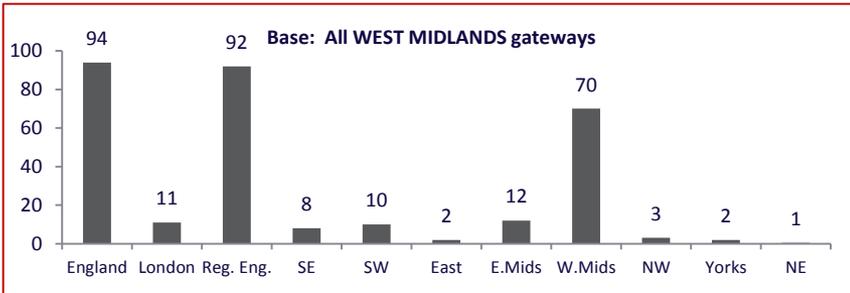
Currently, only 18% of holiday visitors using a London gateway spend at least one night in Regional England – primarily the South East (8%).

Those using South East and East gateways are frequently using these as a route into London. Among those using South East gateways, 48% stay in London and only 55% stay in Regional England. Among those using the East gateways, 55% stay in London and only 47% in Regional England.

The South West is more likely to hold onto those using its gateways. 86% stay in Regional England (82% in the South West) and only 8% stay in London.

Regions stayed in by UK holiday visitors – by gateway region (visits) / 3

Source: IPS 2013-2015

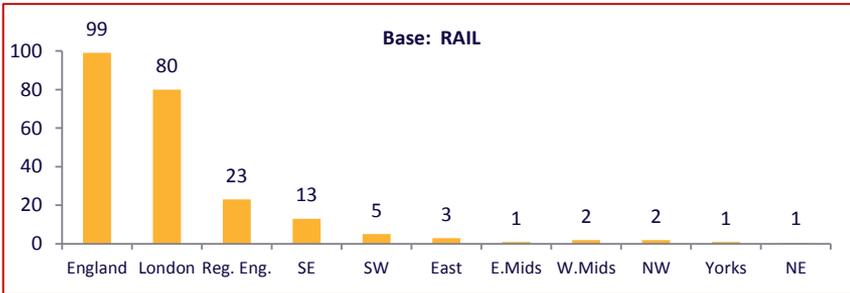
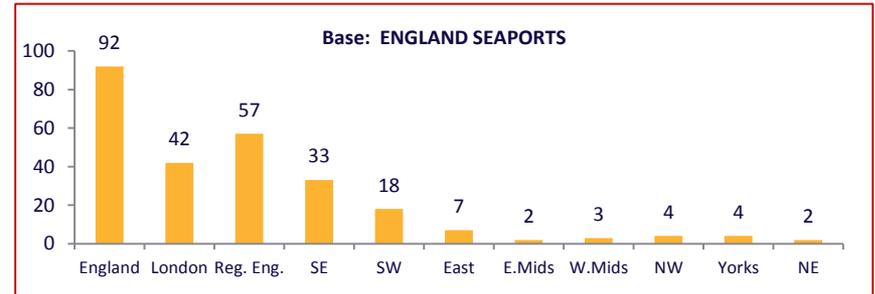
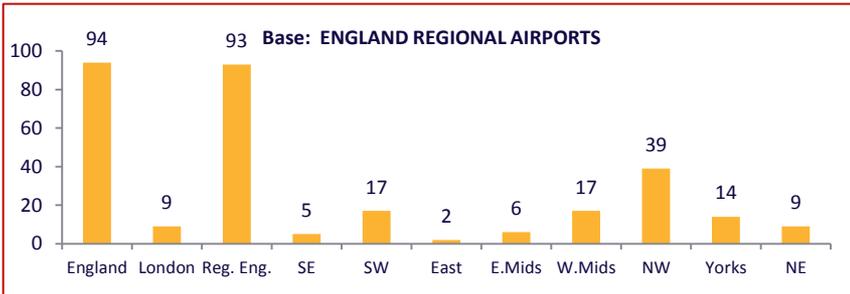
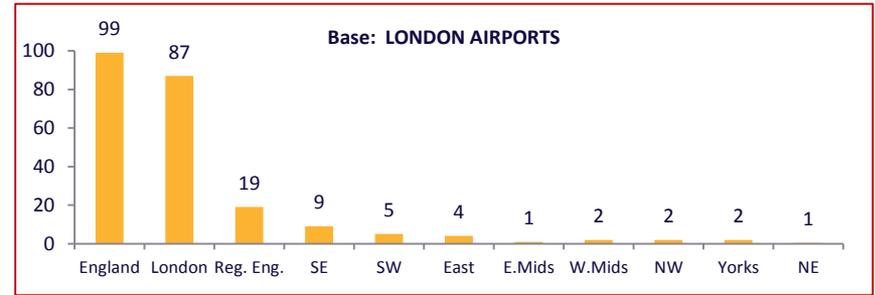
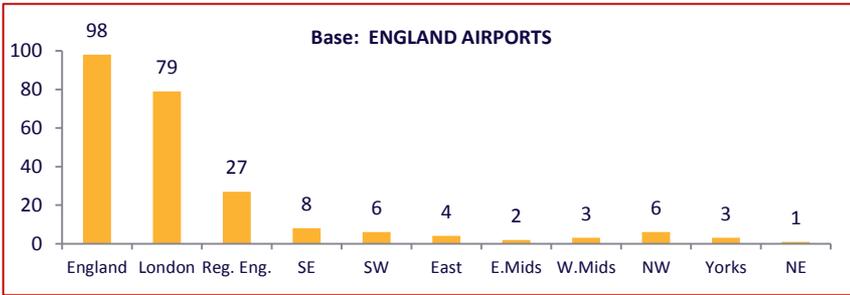


Like the South West, the West Midlands and North West are both more successful at retaining holiday visitors using their gateways. Among those using West Midlands gateways (Birmingham Airport), 92% visit Regional England – although only 70% stay in the West Midlands. Among those using the North West gateways (Manchester and Liverpool airports), 96% stay in Regional England, with 79% staying in the North West and 17% staying in Yorkshire.

Among holiday visitors using the North East gateways, there is notable travel into Scotland. 53% of those using the North East gateways spend at least one night in Scotland, with only 59% staying in England.

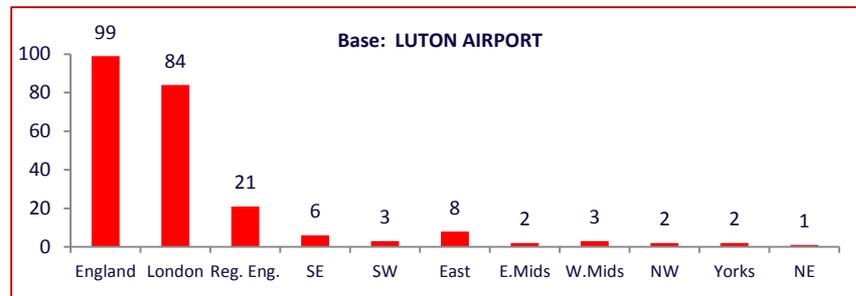
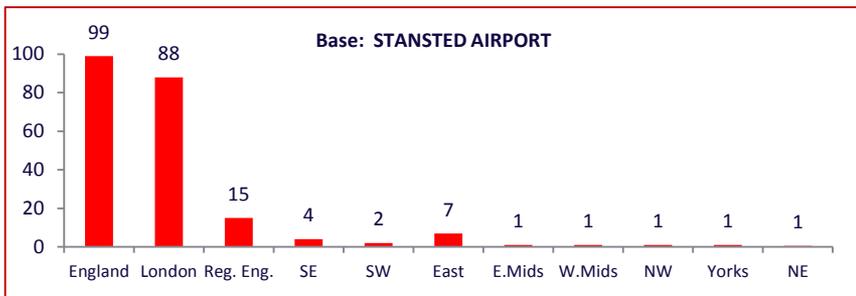
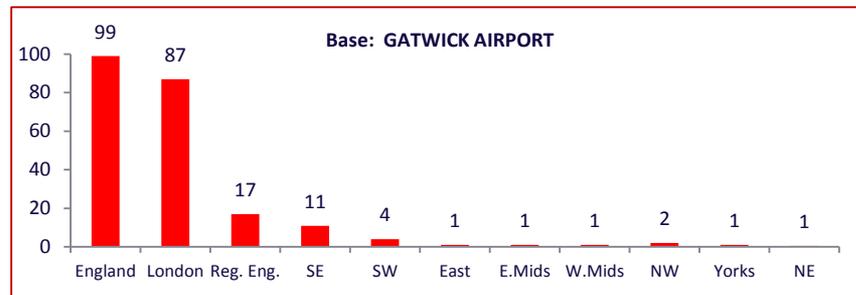
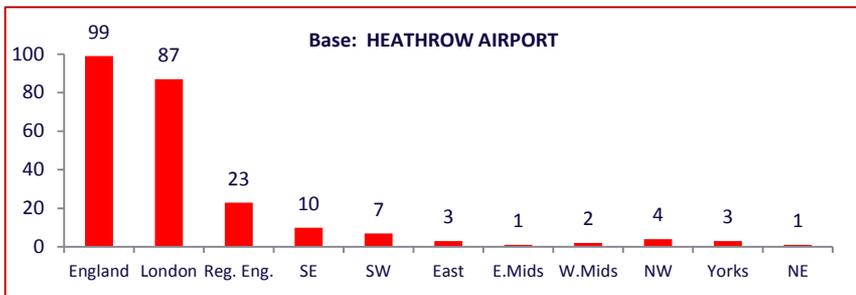
Regions stayed in by UK holiday visitors – by England gateway mode (visits)

Source: IPS 2013-2015



Regions stayed in by UK holiday visitors – by individual England gateway (visits) / 1

Source: IPS 2013-2015



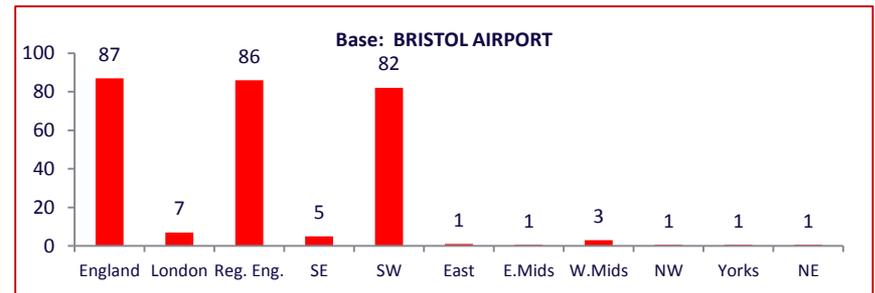
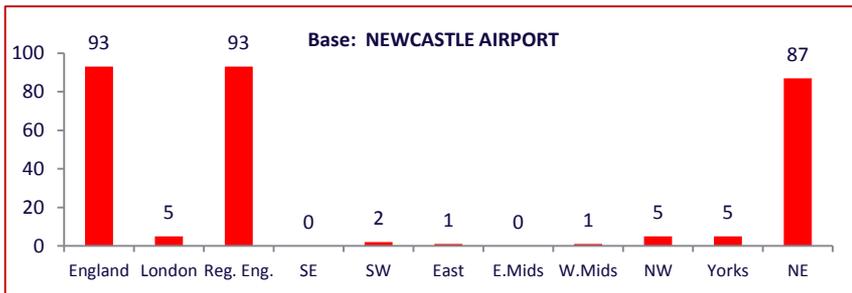
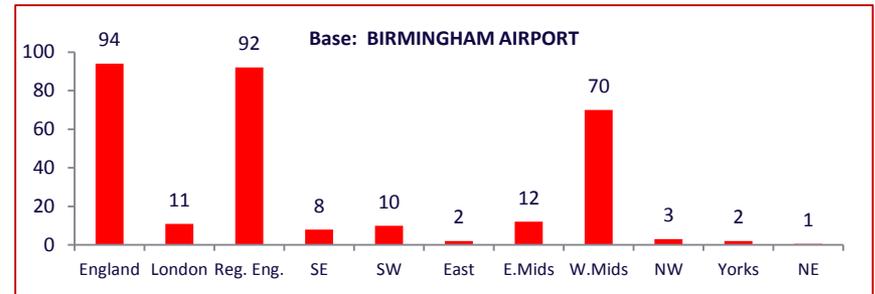
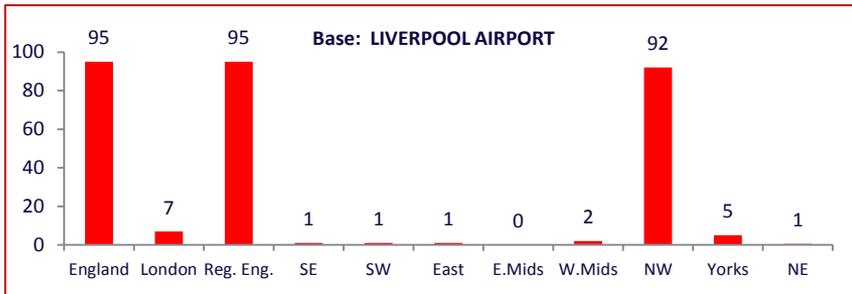
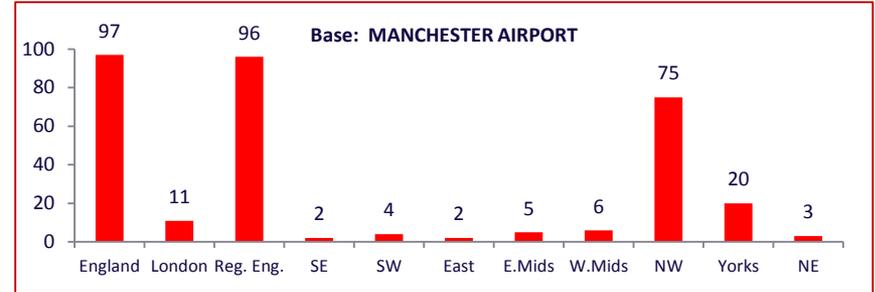
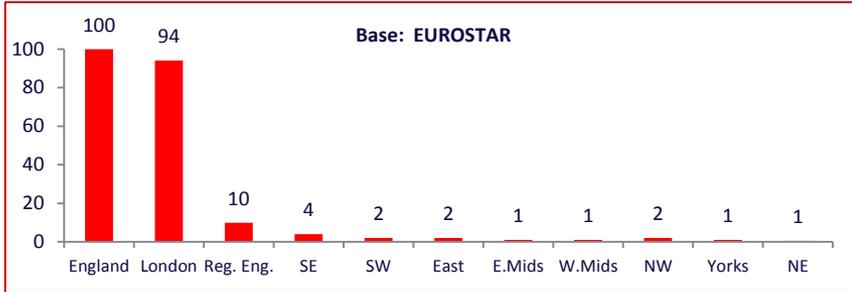
Of all the London airports, Heathrow Airport (23%) records the highest proportion of holiday visitors who stay at least one night in Regional England. However, most stay in either the South East (10%) or South West (7%).

Although representing a significantly lower visit volume, Luton Airport also records 21% of its visitors staying at least one night in Regional England.

As the chart overleaf shows, only 10% of holiday visitors using the Eurostar gateway spend at least one night in Regional England. These visitors are likely to be long haul, so could have potential for regional visits, although they will also be visiting other European destinations on their trip.

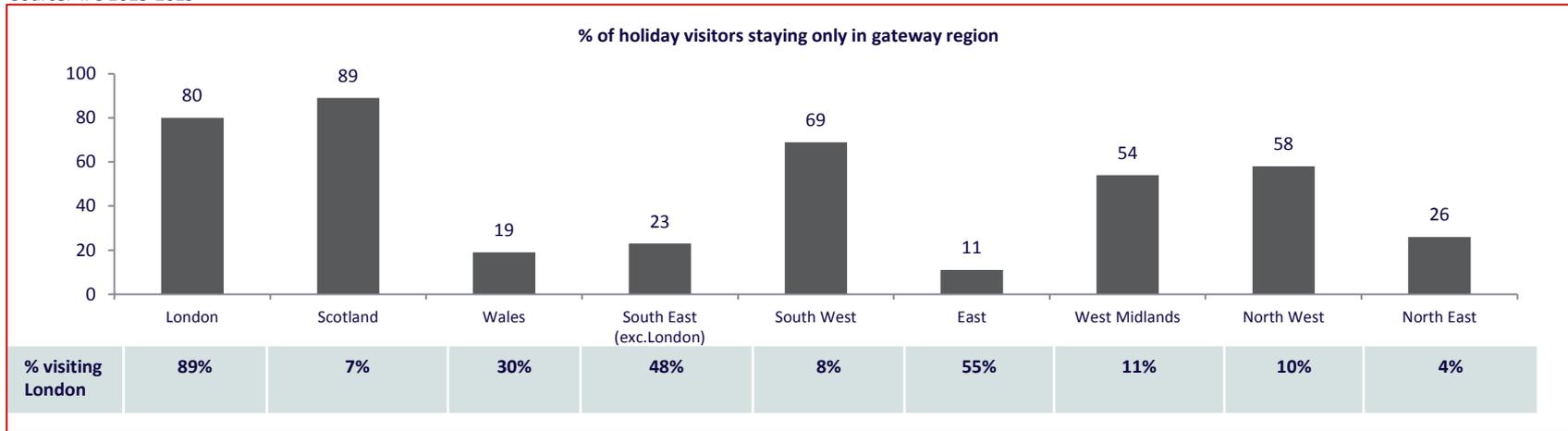
Regions stayed in by UK holiday visitors – by individual England gateway (visits) / 2

Source: IPS 2013-2015



UK holiday visitors who ONLY stayed in gateway region

Source: IPS 2013-2015



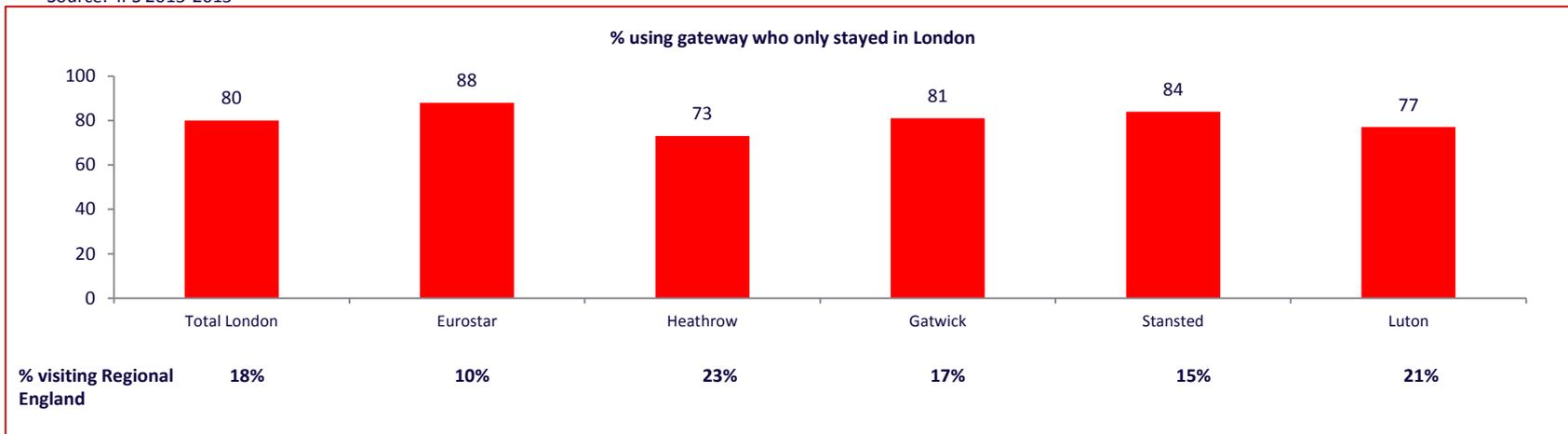
80% of holiday visitors using a London gateway ONLY stayed in London during their trip.

9% of those using a London gateway stayed at least one night in both London and elsewhere in the UK.

Within the other England regions, there are significant proportions of visitors who spend at least one night outside the gateway region. This ranges from 31% among those using South West gateways up to 89% among those using gateways in the East – around half of whom are staying in London.

UK holiday visitors who ONLY stayed in London – by London gateway

Source: IPS 2013-2015



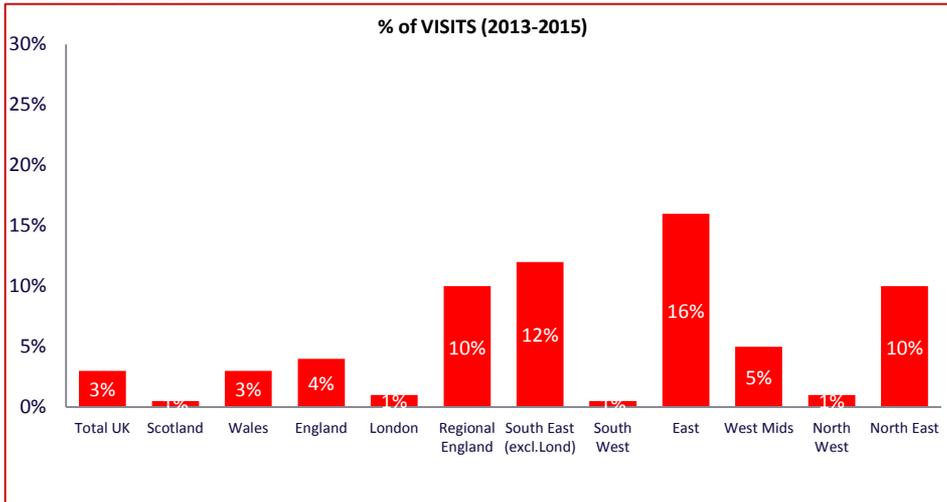
Breaking London gateways down further, we can see once again that holiday visitors using Heathrow Airport are most likely to visit Regional England (23%) and least likely to ONLY stay in London (73%).

The proportions of holiday visitors using individual London gateways who stay in both London AND elsewhere in the UK during their trip are:

- 14% Heathrow Airport
- 7% Luton Airport
- 6% Gatwick Airport
- 6% Eurostar
- 4% Stansted Airport

'Nil night' holiday stays – by gateway (visits) / 1

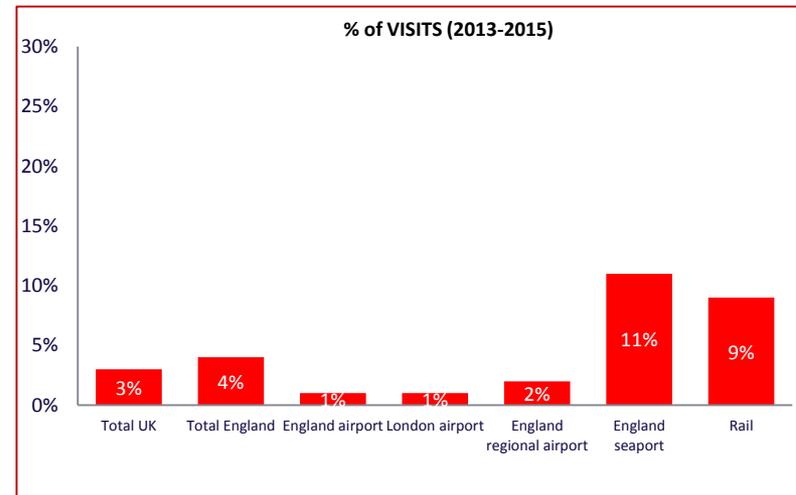
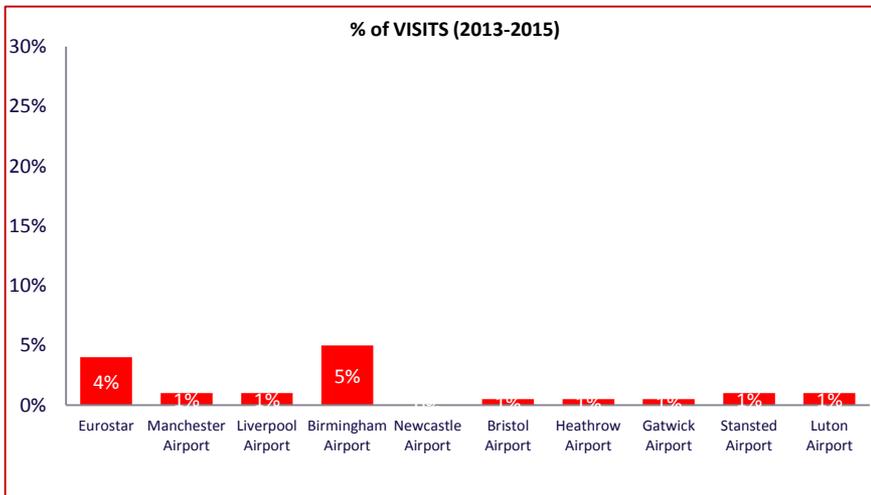
Source: IPS 2013-2015



3% of holiday visits to the UK do not involve an overnight stay. These are heavily driven by those using seaports (11% of visits are 'nil night') and those using Eurotunnel (16%).

This accounts for the high proportion of 'nil night' stays experienced by the gateways in the East (16%), South East (12%) and North East (10%), whose gateways are primarily seaports.

Eurostar (4%) and Birmingham Airport (5%) also have noteworthy proportions of holiday visitors not staying a night at all.

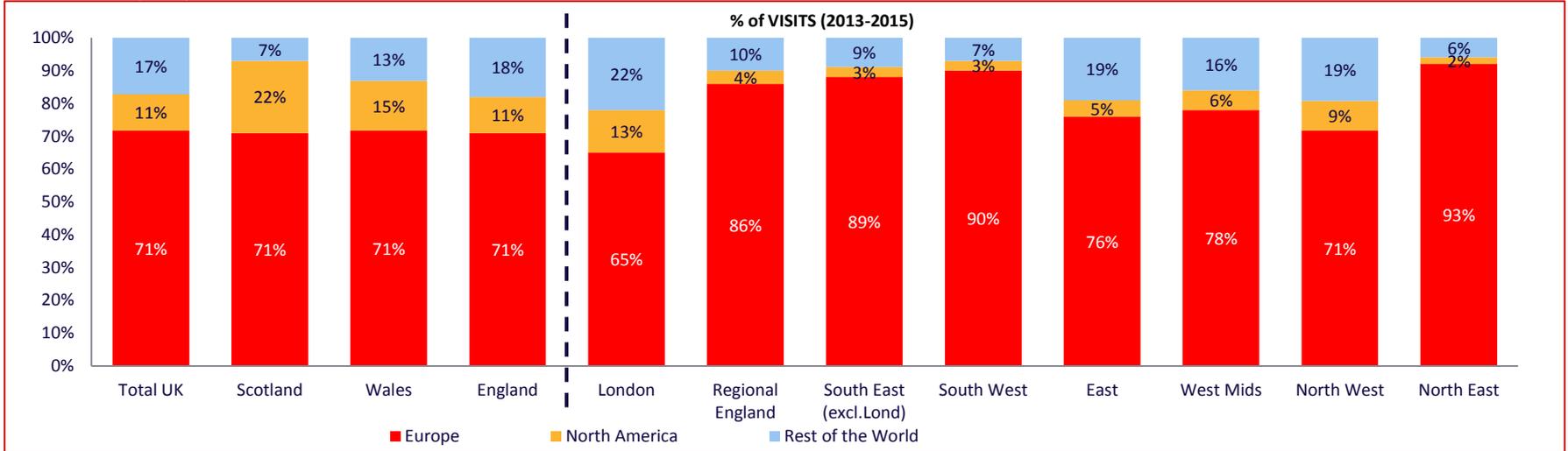


What is the origin of holiday visitors and how do they vary by gateway?

Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015

Source markets for holiday trips to the UK – by gateway region (visits)/1

Source: IPS 2013, 2014, 2015



N.B. East Midlands and Yorkshire regions too small sample sizes to show separately, but included within Regional England

71% of holiday visits to the UK are made by those from Europe, 11% from North America and 17% from the Rest of the World.

This varies significantly by gateway region, with holiday visitors using London gateways significantly more likely to be attracting longer haul visitors (13% North America, 22% Rest of the World) than those using gateways in Regional England (4% North America, 10% Rest of the World).

Gateways in the South East (89%), South West (90%) and North East (93%) are particularly likely to be limited to visitors from Europe.

Source markets for holiday trips to the UK – by gateway region (visits)/2

Source: IPS 2013,2014,2015

	TOTAL UK	Scotland	Wales	England	London	Regional England	SE (exc.Lon)	SW	East	West Mids	NW	NE
ANY EU15	59%	58%	70%	59%	52%	77%	80%	70%	74%	69%	56%	85%
France	14%	9%	1%	15%	11%	24%	34%	9%	-	5%	3%	5%
Germany	11%	17%	4%	11%	7%	18%	20%	6%	16%	17%	10%	28%
USA	9%	18%	12%	9%	11%	3%	2%	2%	4%	5%	7%	1%
Nordics	9%	13%	2%	9%	12%	3%	1%	3%	14%	7%	12%	5%
Italy	6%	5%	<1%	7%	9%	2%	1%	10%	<1%	4%	3%	<1%
Spain	6%	5%	1%	6%	7%	3%	1%	15%	-	3%	7%	2%
Netherlands	5%	6%	2%	5%	3%	13%	12%	7%	44%	4%	4%	29%
Australia	4%	2%	7%	4%	4%	3%	2%	3%	1%	3%	5%	2%
China	1%	1%	1%	1%	1%	<1%	<1%	<1%	<1%	3%	1%	1%

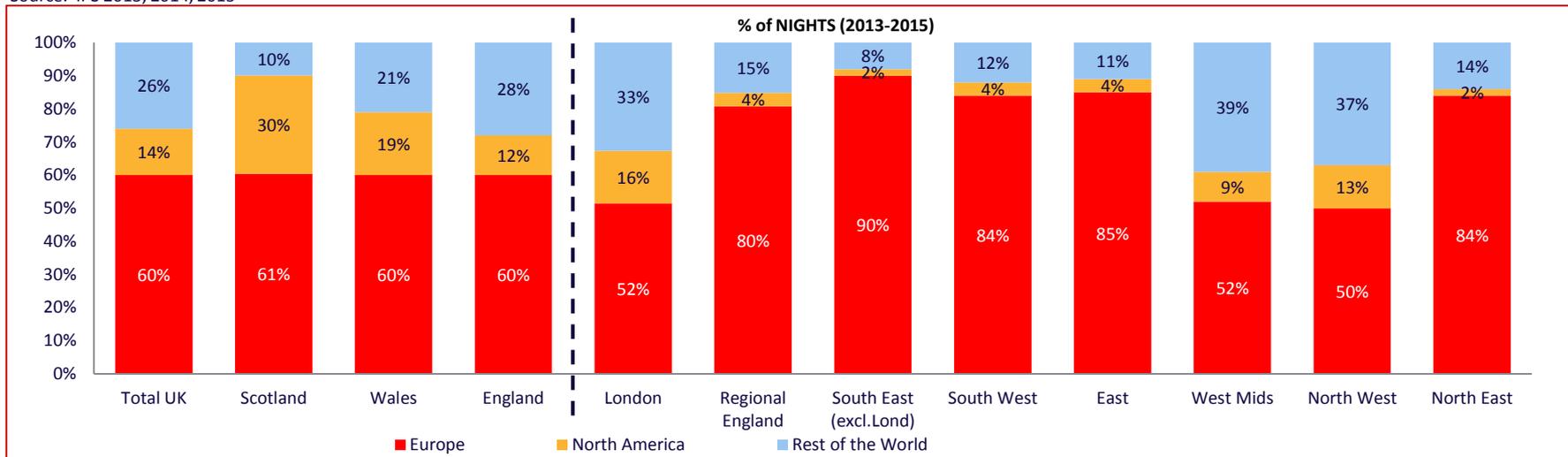
EU15: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden

In more detail, there are some significant variations across gateways in terms of holiday visitors from individual source countries. Whilst those using London gateways are a broad mix of long and short haul visitors, some of the regional gateways are characterised by visitors from a small number of source countries, particularly those dominated by seaports. For example, although representing only 5% of holiday visits to the UK, those from the Netherlands represent 44% of holiday visitors using gateways in the East (primarily the port of Harwich).

Similarly, 28% of those using North East gateways are from Germany (only 11% to the UK overall) and 29% are from the Netherlands.

Source markets for holiday trips to the UK – by gateway region (nights)

Source: IPS 2013, 2014, 2015



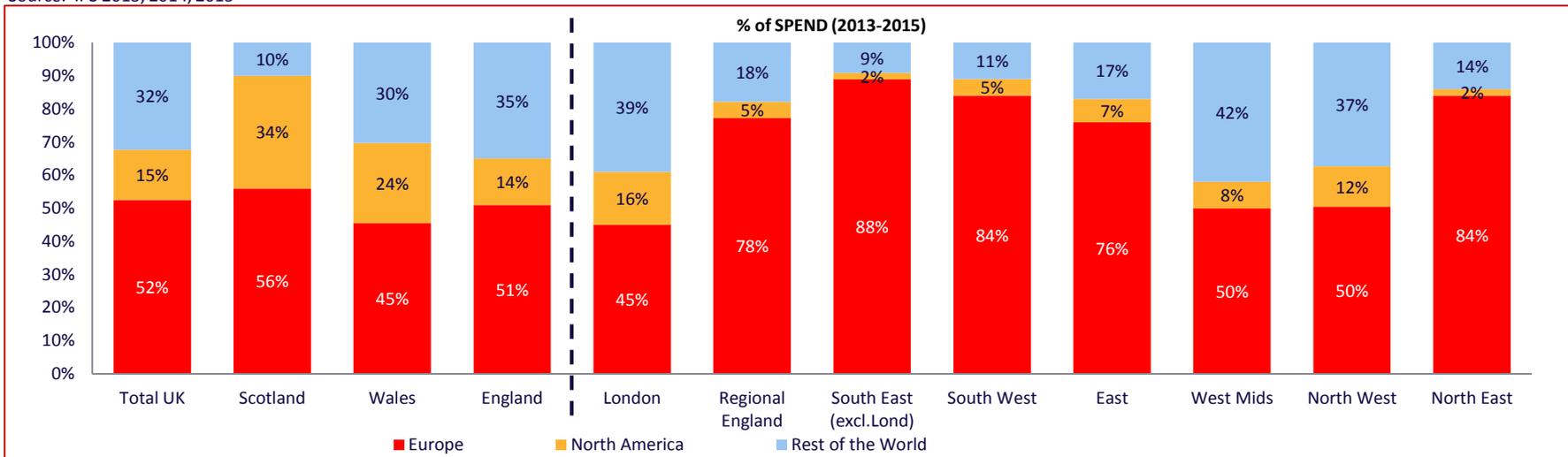
N.B. East Midlands and Yorkshire regions too small sample sizes to show separately, but included within Regional England

In terms of nights, the differences between holiday visitors using London gateways and those using gateways in Regional England are even more stark. Among those using London gateways, 49% of nights spent in the UK are accounted for by those from outside of Europe (16% North America, 33% Rest of the World). Among those using Regional England gateways, this figure is only 20% (4% North America, 15% Rest of the World).

Of note is the high proportion of nights accounted for by holiday visitors from the Rest of the World who use the West Midlands (Birmingham Airport) and North West (Manchester and Liverpool airports) gateways. Although visits to these regions from this source are modest, average length of stay is much longer – two weeks and beyond.

Source markets for holiday trips to the UK – by gateway region (spend)

Source: IPS 2013, 2014, 2015



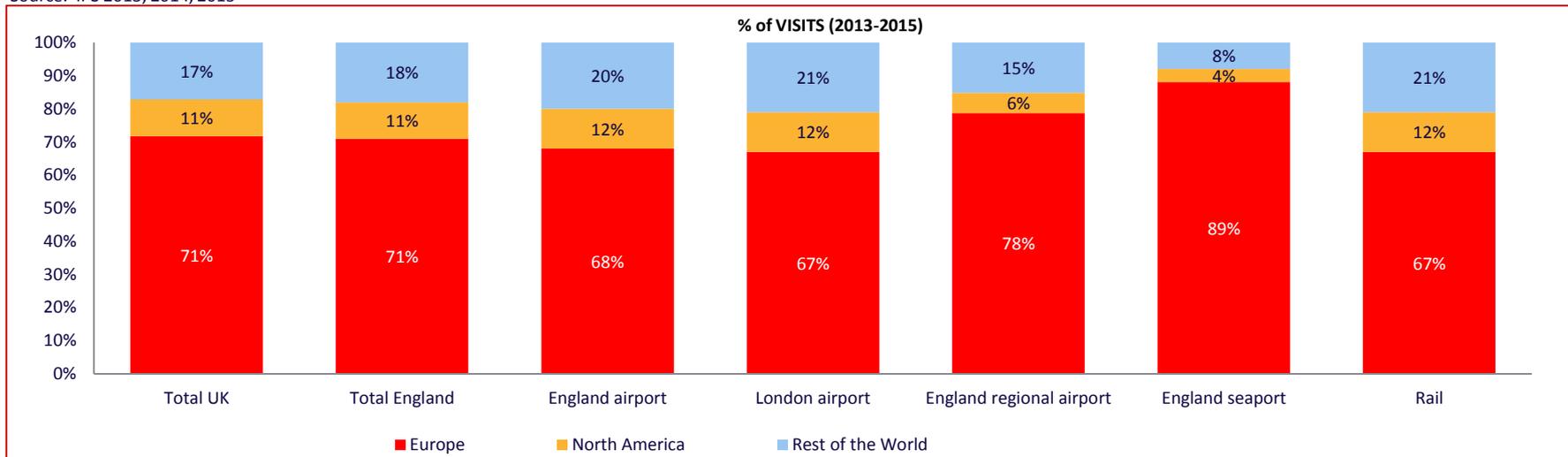
N.B. East Midlands and Yorkshire regions too small sample sizes to show separately, but included within Regional England

The profile of holiday visitors to the UK in terms of spend on the trip demonstrates similar differences across the gateways. London, West Midlands and North West gateways record significantly higher proportions of spend among the Rest of the World market than other gateways in Regional England.

Also of note is the high proportion of visits, nights and spend accounted for by the North American market among holiday visitors using gateways in Scotland. 34% of the spend among those using Scotland's gateways are accounted for by the North American market compared with only 14% among those using England's gateways.

Source markets for holiday trips to the UK – by gateway mode (visits)/1

Source: IPS 2013, 2014, 2015



England’s seaports are dominated by holiday visitors from Europe (89%), with England’s regional airports (78%) also more likely to see holiday visitors from Europe than gateways across the UK overall (71%).

As with London’s airports, those using rail gateways (Eurotunnel and Eurostar) are more diverse in their mix of long and short haul holiday visitors, although the profile of the two rail modes is somewhat different – Eurostar holiday visitors being much more likely to be long haul than those using Eurotunnel.

Source markets for holiday trips to the UK – by gateway mode (visits)/2

Source: IPS 2013,2014,2015

	TOTAL UK	Total England	England airport	London airport	England regional airport	England seaport	Rail
ANY EU15	59%	59%	53%	52%	64%	81%	63%
France	14%	15%	5%	5%	6%	25%	38%
Germany	11%	11%	9%	9%	10%	27%	4%
USA	9%	9%	10%	10%	5%	3%	10%
Nordics	9%	9%	13%	14%	9%	2%	-
Italy	6%	7%	10%	10%	5%	1%	-
Spain	6%	6%	8%	8%	10%	1%	1%
Netherlands	5%	5%	3%	3%	6%	16%	5%
Australia	4%	4%	4%	4%	4%	3%	4%
China	1%	1%	1%	1%	1%	-	1%

EU15: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden

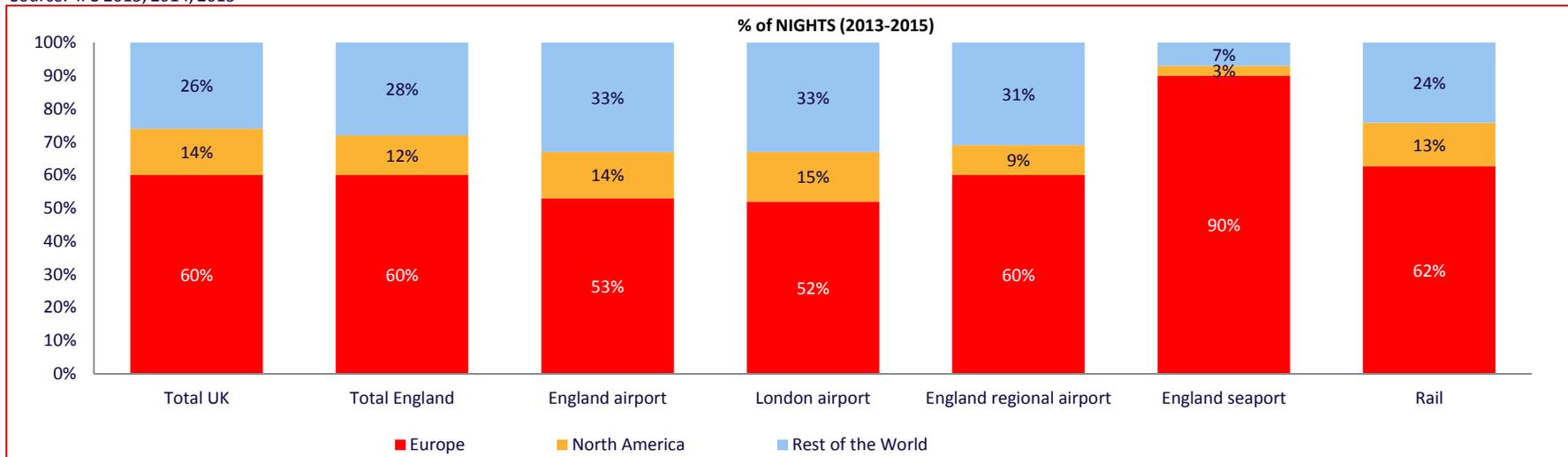
Holiday visitors using England’s seaports are dominated by visitors from Germany (27%), France (25%) and the Netherlands (16%).

England’s regional airports are also more likely to be used by holiday visitors from the EU15 countries (64%) than visitors to England overall (59%), with visitors from Spain (10%) being notable here.

Visitors from Nordic countries are most likely to be seen using London airport gateways – 14% of holiday visitors using London’s airports are from the Nordic countries compared with only 9% of Nordic holiday visitors to England overall.

Source markets for holiday trips to the UK – by gateway mode (nights)

Source: IPS 2013, 2014, 2015

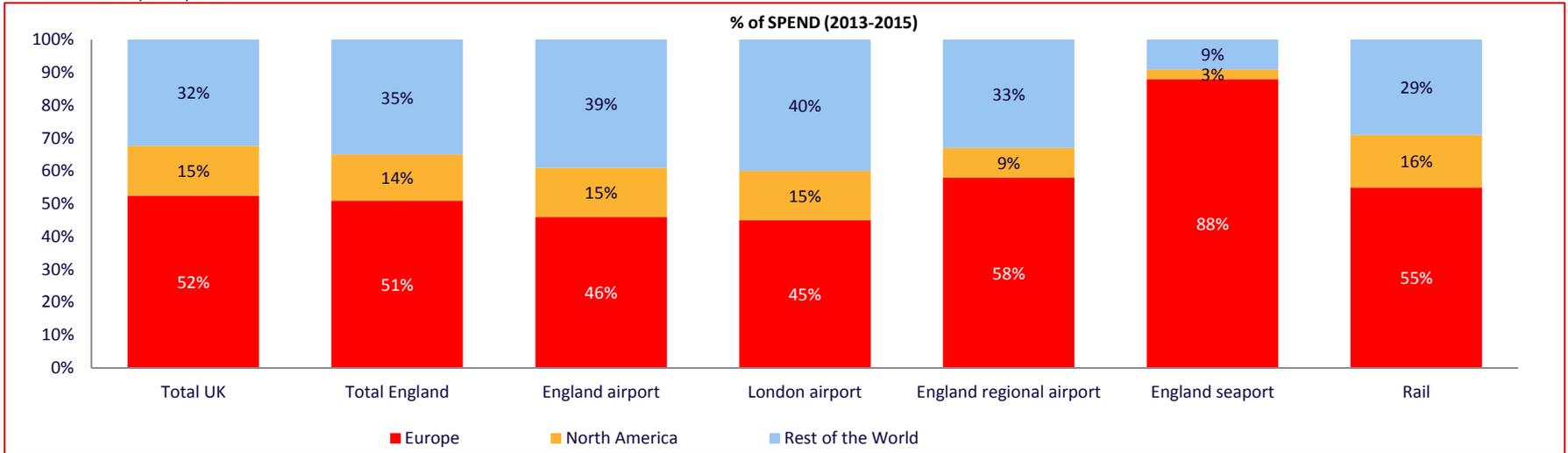


In terms of holiday nights spent in the UK, England’s seaports stand out even further as being dominated by visitors from Europe. 90% of all holiday nights spent by those using England’s seaports are accounted for by visitors from Europe.

In terms of nights, those using rail gateways do not stand out as much for long haul markets as they do for visits. This reflects the European multi-destination holidays typical of those long haul visitors using Eurostar, who typically spend short periods of time in England (and mainly London).

Source markets for holiday trips to the UK – by gateway mode (spend)

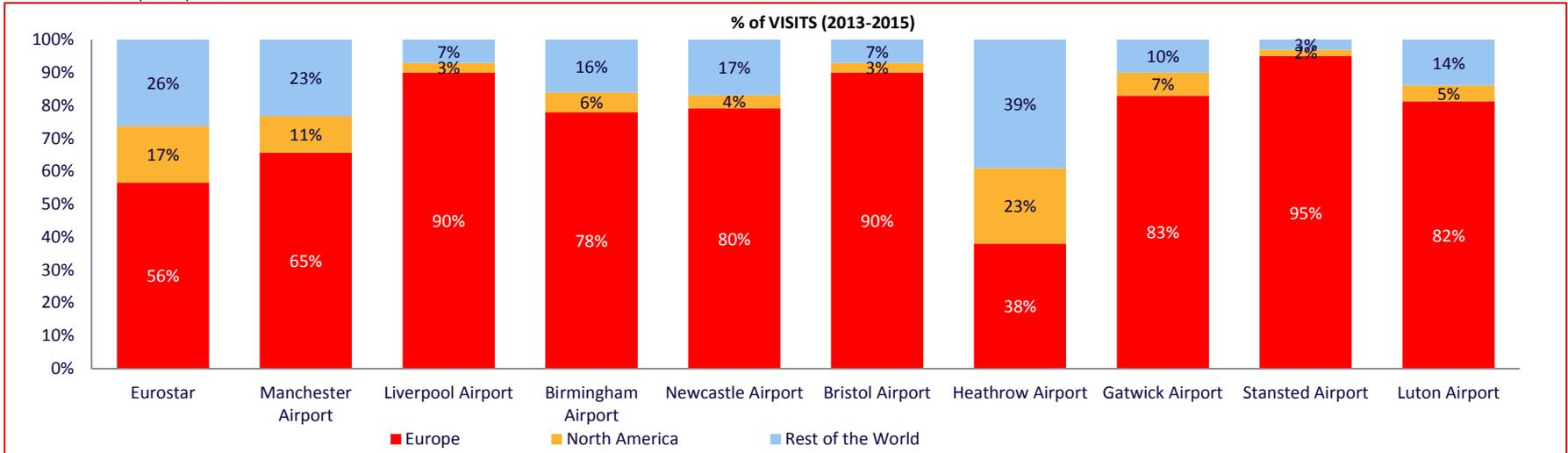
Source: IPS 2013, 2014, 2015



When looking in terms of spend, the role of London airports at attracting long haul visitors comes to the fore. Among holiday visitors using London’s airports, 40% of the spend in the UK is accounted for by the Rest of World market and a further 15% by the North American market.

Source markets for holiday trips to the UK – by individual gateway (visits)/1

Source: IPS 2013, 2014, 2015



When looking at London’s airports individually, there are some notable differences in the origin profiles of holiday visitors using Heathrow and the other three principal London airports. Heathrow sees 23% of its holiday visitors from North America and 39% from other long haul origins, whereas each of the other London airports are dominated by holiday visitors from European origins.

The main regional airports in England also tend to be made up of European holiday visitors, although each of Manchester, Birmingham and Newcastle airports have a notable minority of visitors from the Rest of the World.

Eurostar also records 44% of its holiday visitors from outside Europe – 17% from North America and 26% from the Rest of the World, again many on pan-European holidays.

Source markets for holiday trips to the UK – by individual gateway (visits)/2

Source: IPS 2013,2014,2015

	Eurostar	Manchester Airport	Liverpool Airport	Birmingham Airport	Newcastle Airport	Bristol Airport	Heathrow Airport	Gatwick Airport	Stansted Airport	Luton Airport
ANY EU15	55%	50%	75%	69%	65%	70%	28%	65%	79%	44%
France	36%	3%	4%	5%	4%	9%	2%	8%	6%	11%
Germany	2%	11%	4%	17%	8%	6%	8%	5%	13%	7%
USA	15%	9%	2%	5%	3%	2%	20%	5%	1%	4%
Nordics	<1%	13%	8%	7%	16%	3%	9%	23%	15%	6%
Italy	<1%	4%	2%	4%	1%	10%	3%	13%	22%	6%
Spain	1%	5%	15%	3%	8%	14%	2%	13%	14%	6%
Netherlands	2%	4%	5%	4%	11%	7%	2%	2%	3%	3%
Australia	6%	6%	2%	3%	7%	3%	6%	2%	1%	1%
China	1%	1%	-	3%	2%	<1%	2%	<1%	<1%	<1%

EU15: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden

Although 36% of Eurostar holiday visitors are from France, there are also significant proportions from long haul origins such as the USA (15%) and Australia (6%).

Holiday visitors from the USA tend to use Heathrow Airport – 20% of Heathrow’s holiday visitors originating from the USA.

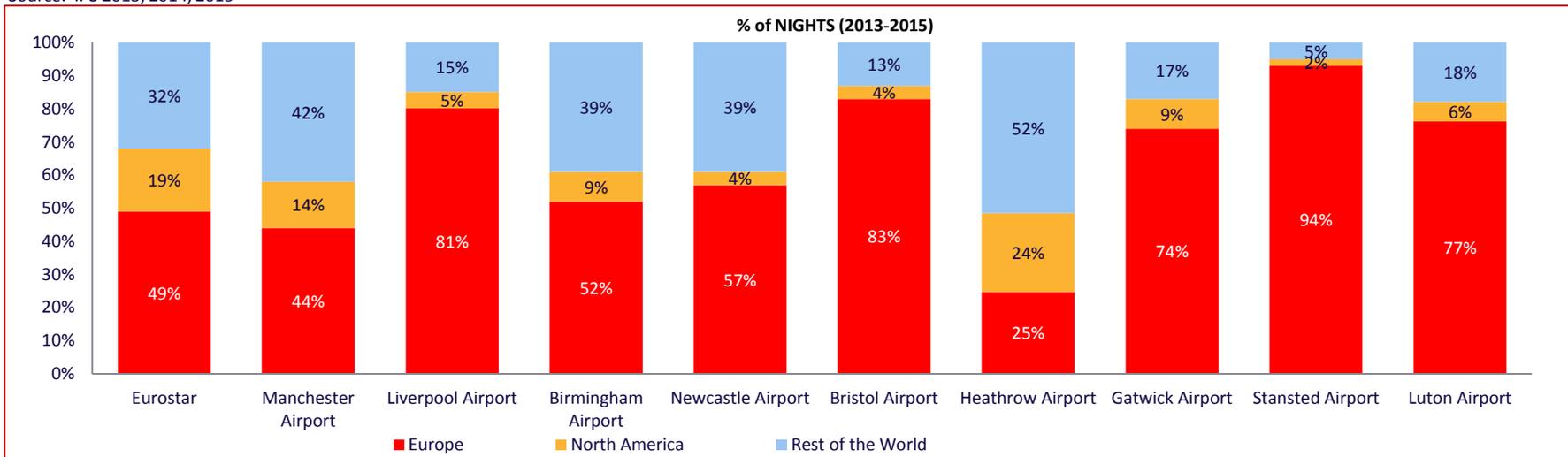
Although 82% of holiday visitors using Luton Airport are from Europe, only 44% are from the EU15 countries. Luton Airport is a favoured gateway for holiday visitors from the European accession countries.

Holiday visitors from the Nordic countries are well represented at Gatwick Airport (23% of holiday visitors), Newcastle Airport (16%) and Stansted Airport (15%).

Holiday visitors from Italy are particularly well represented at Stansted Airport (22%), whilst those from Spain are well represented at both Liverpool and Bristol airports. Dutch holiday visitors are well represented at Newcastle Airport (11%).

Source markets for holiday trips to the UK – by individual gateway (nights)

Source: IPS 2013, 2014, 2015



In terms of nights spent in the UK, Heathrow is even more dominated by visitors from outside Europe. Among those using Heathrow, 24% of nights in the UK are accounted for by North American visitors and 52% by those from other non-European origins.

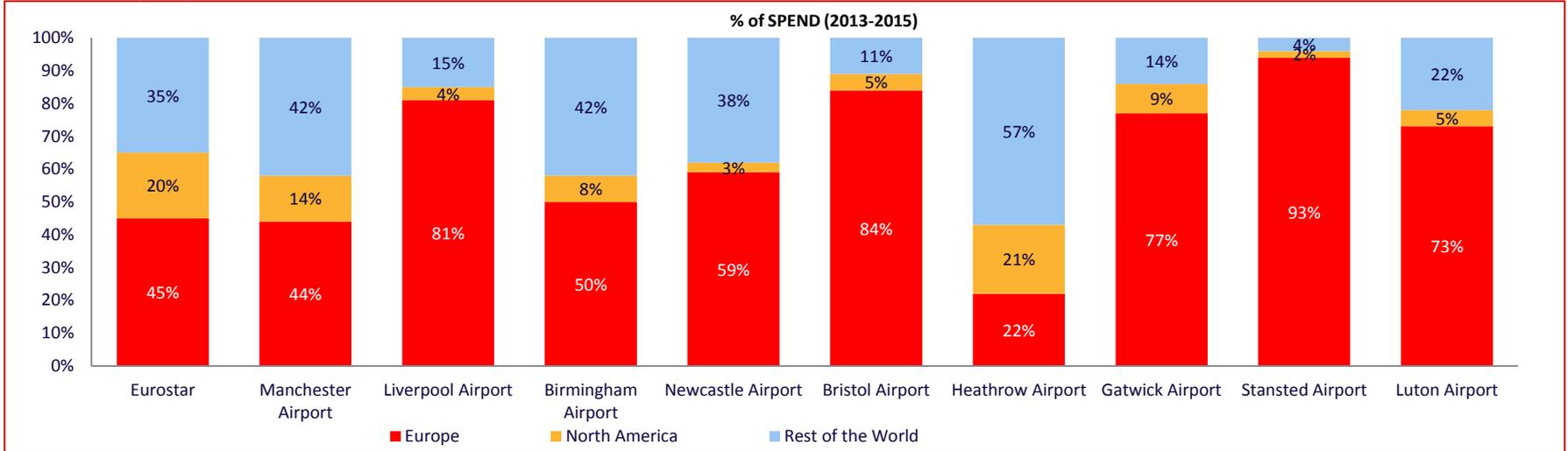
Manchester, Birmingham and Newcastle airports also record around 40% of nights in the UK spent by holiday visitors from Rest of the World origins. North American holiday visitors are less significant at these airports.

European visitors dominate in terms of nights spent in the UK for each of the other principal airport gateways.

As with visits, holiday visitors from North America and other long haul origins also account for significant proportions of nights spent in the UK, although with a much shorter average length of stay among these visitors, the difference between proportions of visits and nights is not as great as for the airport gateways.

Source markets for holiday trips to the UK – by individual gateway (spend)

Source: IPS 2013, 2014, 2015



The origin profile of visitors by individual gateway is similar in terms of spend as in terms of nights spent in the UK.

Among those using Heathrow Airport, 57% of holiday spend in the UK is accounted for by visitors from the Rest of the World and a further 21% by visitors from North America.

Again, Manchester, Birmingham and Newcastle airports also record large proportions of holiday spend originating from Rest of the World markets.

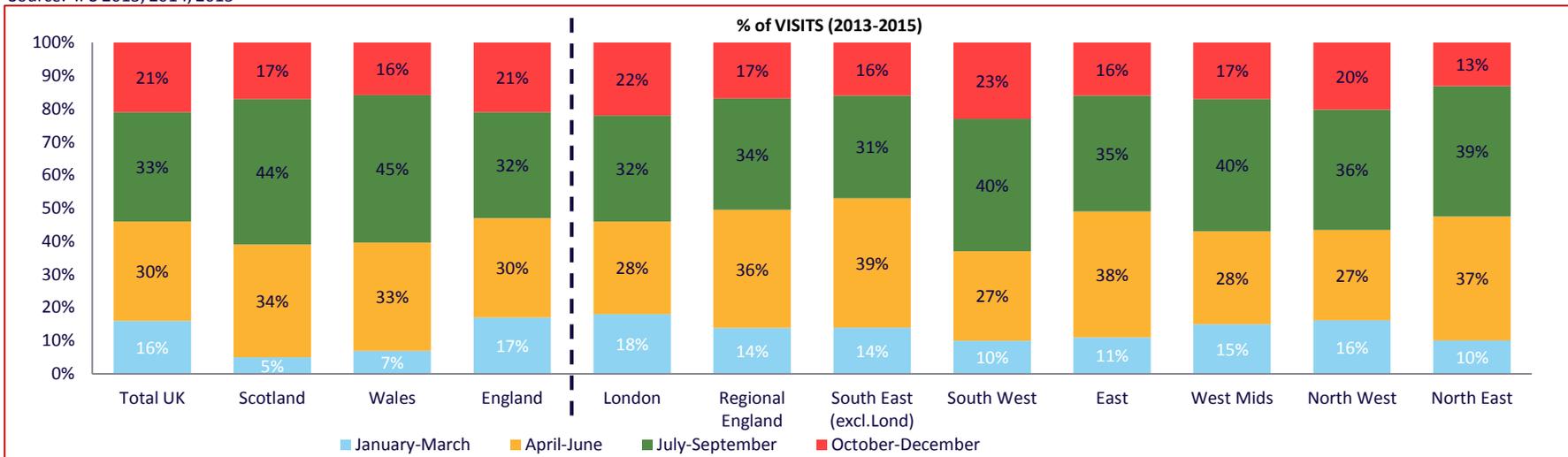
Holiday spend at the other three principal London airports is dominated by European visitors – as much as 93% at Stansted.

How else do holiday visitors vary by gateway?

Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015

Seasonality of holiday stays in England – by gateway region (visits)

Source: IPS 2013, 2014, 2015



N.B. East Midlands and Yorkshire regions too small sample sizes to show separately, but included within Regional England

Holiday visitors who use Regional England gateways are more likely to visit during the April-June period (36% visit at this time) than those using the London gateways (28%). This is particularly the case among those using gateways along the eastern half of England – South East (39% Apr-Jun), East (38%) and North East (37%).

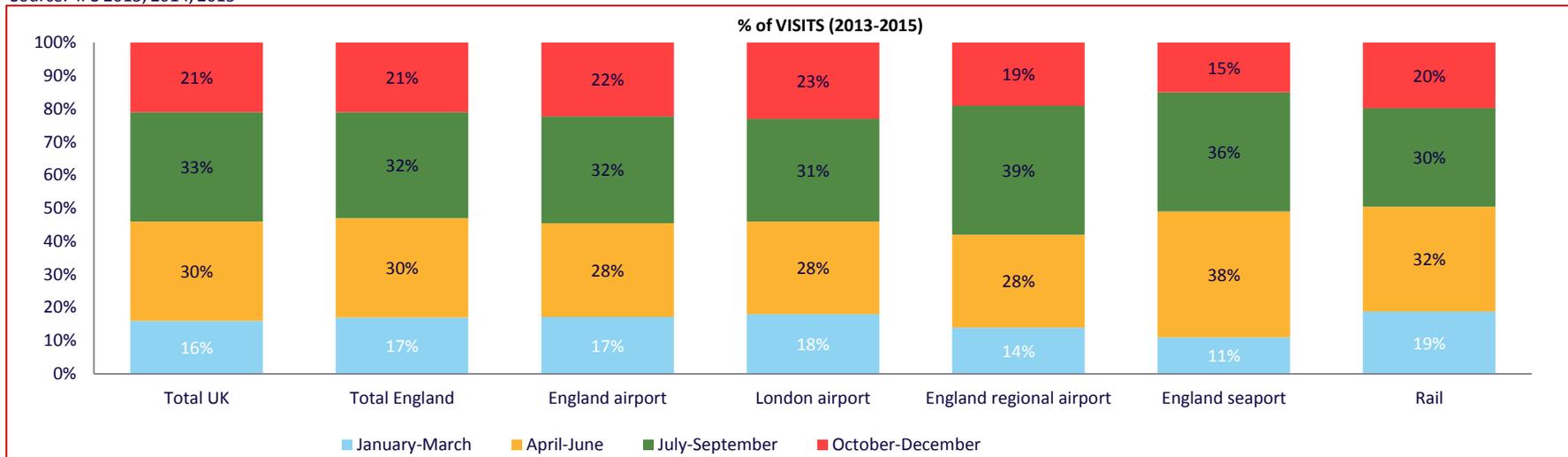
Those using the South West (40%), West Midlands (40%) and North East (39%) gateways have a strong July-September skew, with only 33% visiting during this period across the UK overall.

Other than London (40%), the North West gateway region shows the greatest seasonal spread, with 36% visiting during the October-March period.

Holiday visitors staying in England who use gateways in Scotland or Wales are heavily skewed towards visiting in the April-September period, particularly during the peak July-September months.

Seasonality of holiday stays in England – by gateway mode (visits)

Source: IPS 2013, 2014, 2015



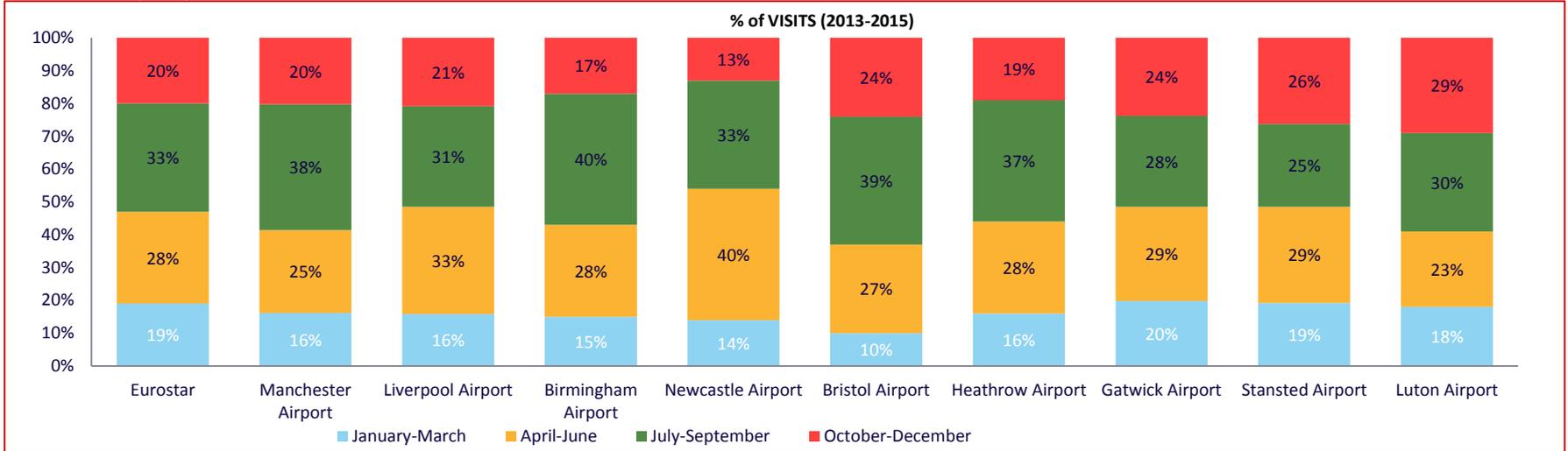
The strong April-June visiting period for holiday visitors using gateways in the eastern half of England is reflected in the profile of visitors using England’s seaports, which characterise gateways along the eastern coast. 38% of those using England’s seaports visit during the April-June period compared with only 30% across England’s gateways overall.

England’s regional airports show a strong July-September holiday visit skew, with 39% of visits taking place during this period compared with only 32% across England’s gateways overall.

Rail gateways have more of a year-round profile, with 39% of their holiday visits occurring in the October-March period – much higher than regional gateways. London airport gateways also have a stronger year-round profile.

Seasonality of holiday stays in England – by individual gateway (visits)

Source: IPS 2013, 2014, 2015



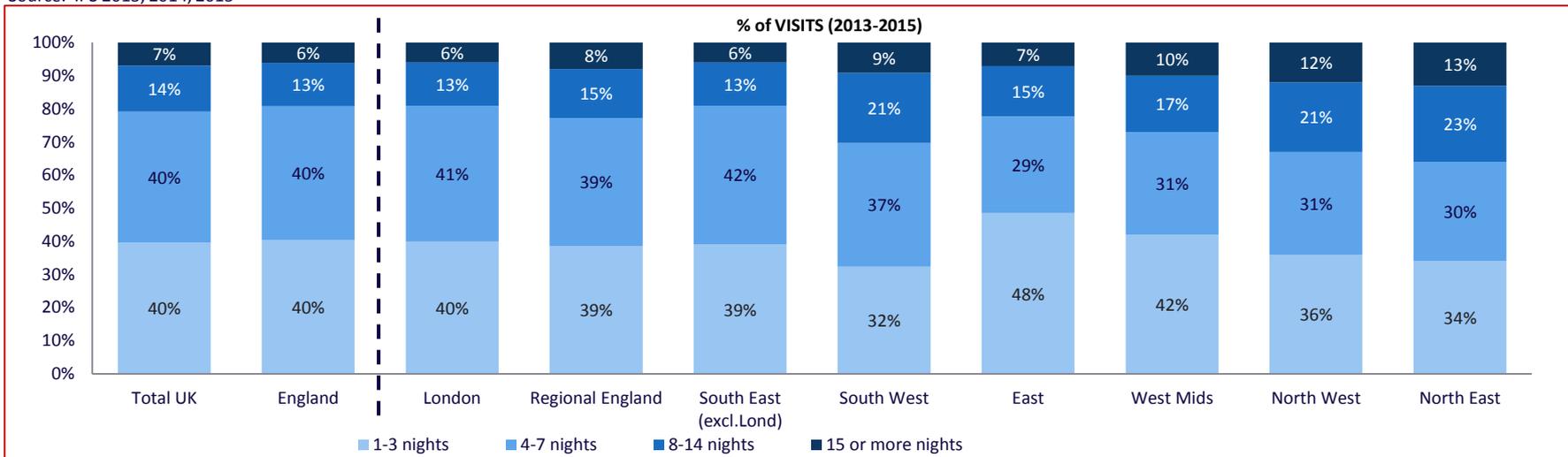
In terms of individual gateways, those most reliant upon July-September holiday visitors are Birmingham Airport (40%), Bristol Airport (39%), Manchester Airport (38%) and perhaps most significantly, Heathrow Airport (37%).

Newcastle Airport has a strong skew towards those visiting in the April-June period.

Both Stansted and Luton airports currently record significant proportions of holiday visitors during the October-December period.

Length of holiday stays in England – by gateway region (visits)

Source: IPS 2013, 2014, 2015



N.B. East Midlands and Yorkshire regions too small sample sizes to show separately, but included within Regional England

Currently, 21% of all holiday stays which involved at least one night in England last more than 7 nights.

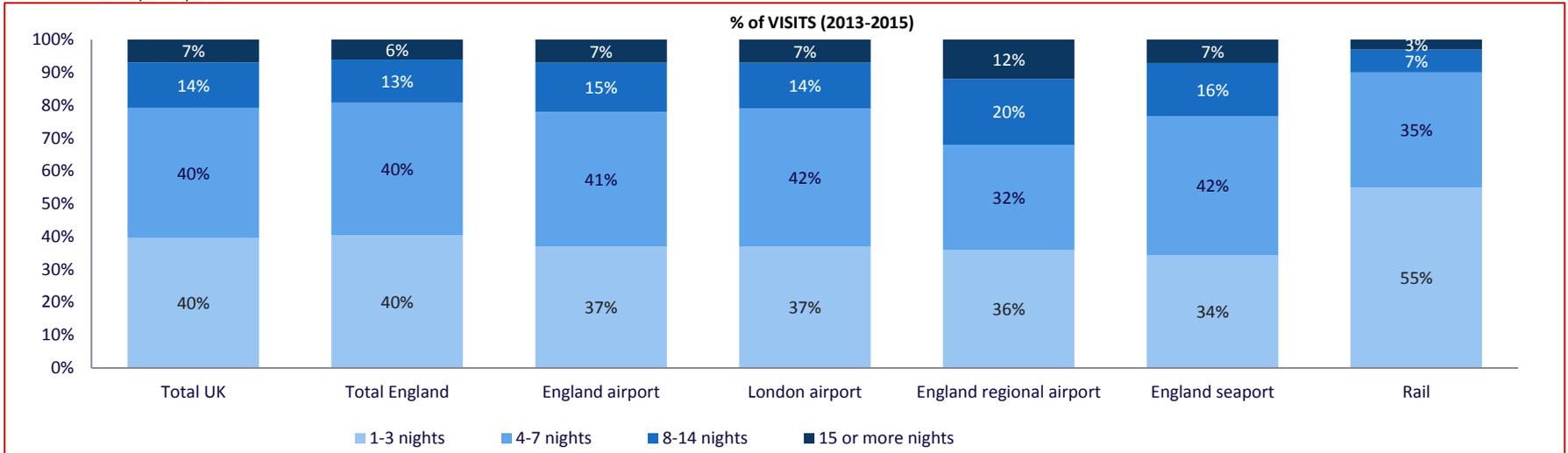
This varies significantly by regional gateway, with those using gateways in the North East (36%), North West (33%) and South West (30%) most likely to be staying for more than 7 nights.

Those using the London (19%) and South East (19%) gateways are least likely to be staying for more than 7 nights.

There are a large proportion of those using gateways in the East who are on a short break of 1-3 nights. 48% of those using these gateways are on a short break compared with only 40% across England's gateways overall.

Length of holiday stays in England – by gateway mode (visits)

Source: IPS 2013, 2014, 2015

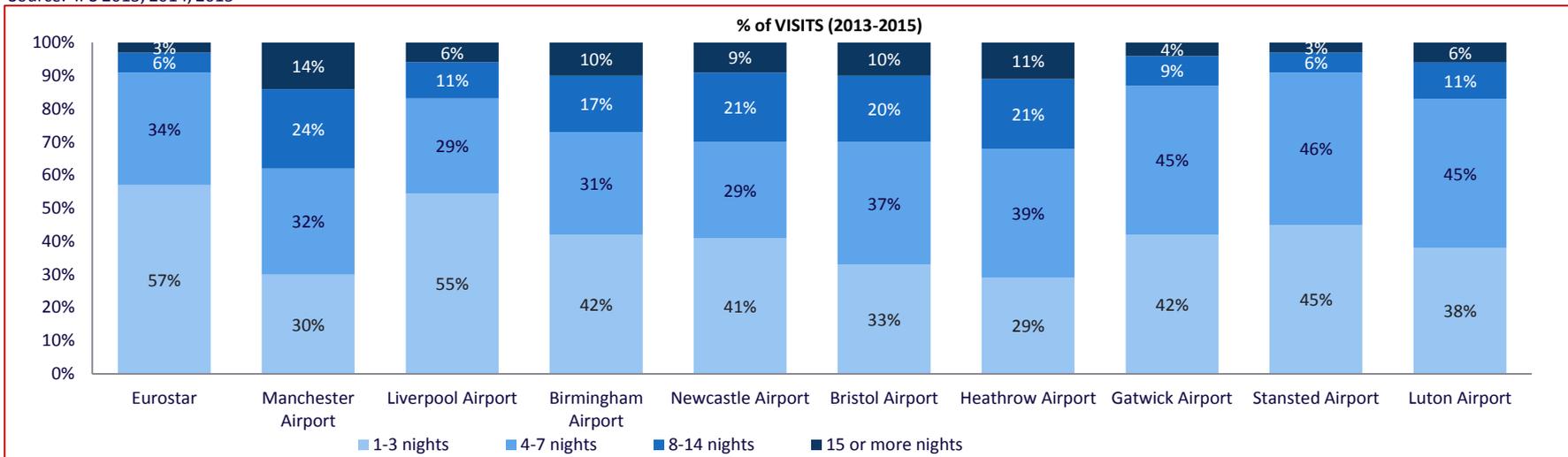


Holiday visitors using England’s regional airports are most likely to stay for more than 7 nights. 32% of those using England’s regional airports stay more than 7 nights compared with 21% who use the UK’s gateways overall.

Those using rail gateways record the shortest stay length, with 55% on a short break of 1-3 nights and only 10% staying for more than 7 nights.

Length of holiday stays in England – by individual gateway (visits)

Source: IPS 2013, 2014, 2015



Those using Manchester Airport tend to generate the longest stays, with 38% of holiday visitors staying more than 7 nights, with stays of more than 14 nights particularly notable here. This a very different profile to the short-stay dominated neighbouring Liverpool Airport.

Those using Heathrow, Bristol and Newcastle Airports are also more likely to stay for more than 7 nights, although Newcastle Airport also has a significant proportion of visitors on short breaks of 1-3 nights.

Each of Gatwick, Stansted and Luton airports generate higher than average proportions of visitors staying between 4 and 7 nights.

Eurostar is dominated by short break visitors (at least, staying on a short break in England), with 57% of holiday visitors staying 1-3 nights only.

Type of holiday to England – by gateway region (visits)

Source: IPS 2013, 2014, 2015



N.B. East Midlands and Yorkshire regions too small sample sizes to show separately, but included within Regional England

There is some strong variation across the gateways in terms of whether holiday visitors are taking a package or independently organised holiday – package holidays being defined as those where travel fares and accommodation are purchased together. Again, those using gateways in the eastern half of England, particularly the South East and East are significantly more likely to be on a package holiday. Indeed, 41% of all those using England’s regional gateways are on a package holiday.

Type of holiday to England – by gateway mode (visits)

Source: IPS 2013, 2014, 2015

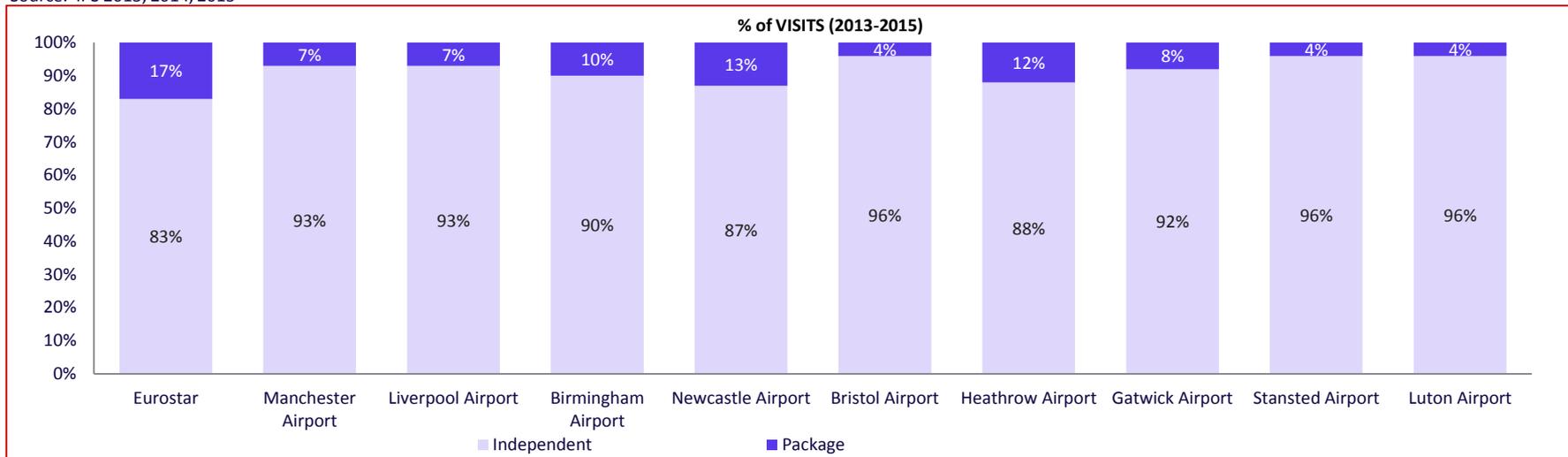


Again, this regional pattern of package holiday taking is driven by England’s seaports, where 49% of holiday visitors are on a package holiday.

Those using rail gateways (30%) also have a notable representation of package holiday takers, although this is primarily driven by those using Eurotunnel, with only 17% of those using Eurostar on a package holiday visit (see chart overleaf).

Type of holiday to England – by individual gateway (visits)

Source: IPS 2013, 2014, 2015

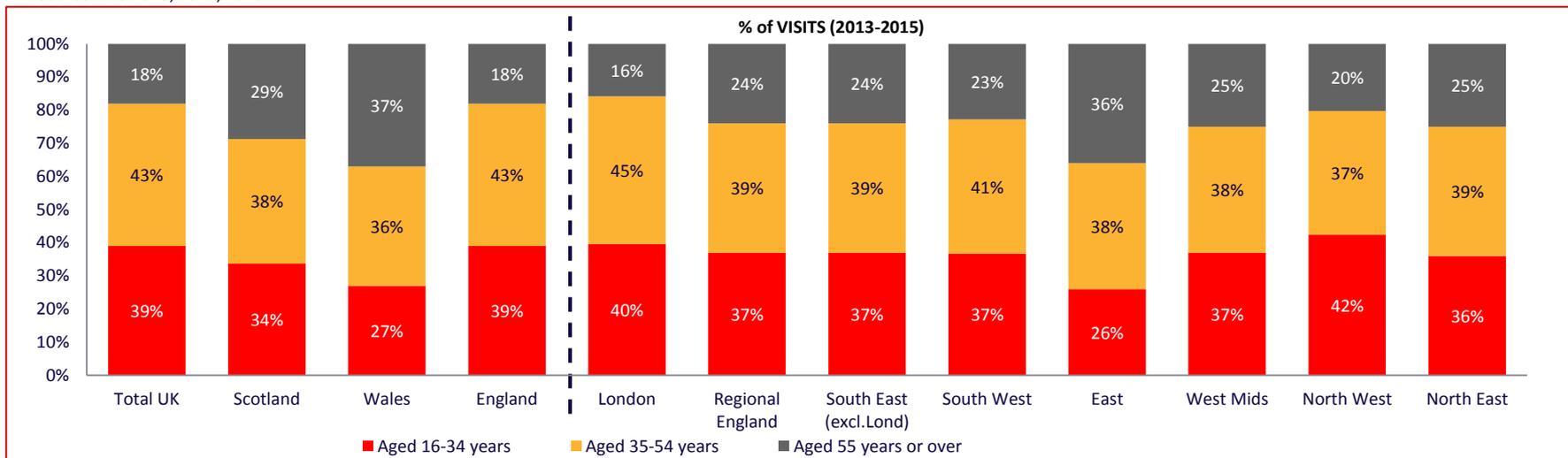


Package holiday taking is generally relatively low among those using England’s airports with only 9% of holiday visitors on a package holiday.

Newcastle (13%) and Heathrow (12%) airports have a slightly higher likelihood to generate package holiday traffic.

Age of holiday visitors staying in England – by gateway region (visits)

Source: IPS 2013, 2014, 2015



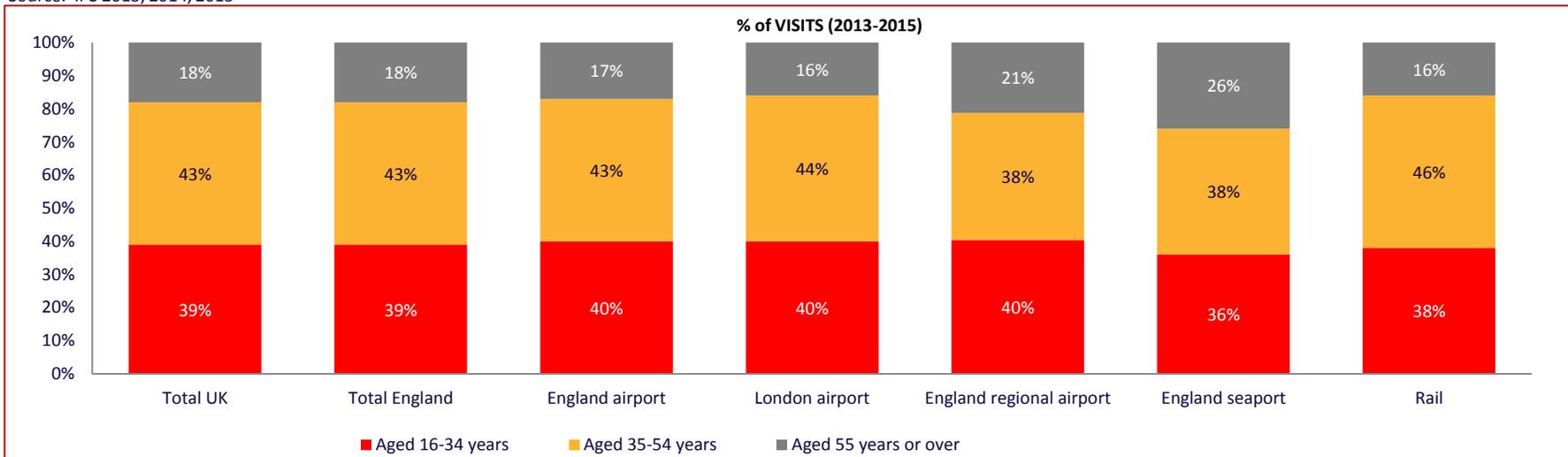
N.B. East Midlands and Yorkshire regions too small sample sizes to show separately, but included within Regional England

The age profile of holiday visitors who stay in England is relatively similar across the UK’s gateways, with a small number of exceptions:

- Those holiday visitors using London’s gateways are more likely to be aged under 55 years, particularly aged between 35-54 years
- Those staying in England who use gateways in the East and Wales tend to be much older, with 36% and 37% respectively being visitors aged 55 or over
- Those using North West gateways are most likely to be from the youngest 16-34 year old age group

Age of holiday visitors staying in England – by gateway mode (visits)

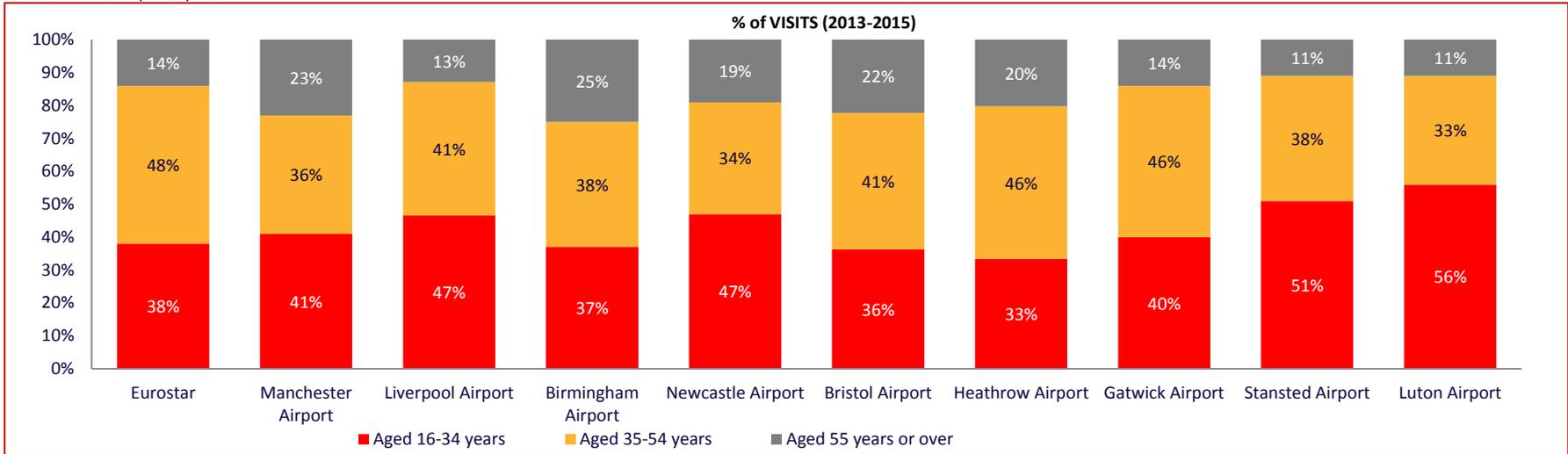
Source: IPS 2013, 2014, 2015



Holiday visitors using England’s seaports tend to be the oldest, with 26% aged 55 years or older compared with only 18% across the UK’s gateways overall.

Age of holiday visitors staying in England – by individual gateway (visits)

Source: IPS 2013, 2014, 2015



England’s regional airports are also slightly more likely to generate holiday visitors aged 55 or over and this is driven by visitors using Birmingham (25% aged 55 or over) and Manchester (23%) airports.

Holiday visitors using Luton (56%), Stansted (51%), Newcastle (47%) and Liverpool (47%) airports record the highest proportion of holiday visitors aged 16-34 years.



Further information

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