

Summary insights on overseas visitors to the UK

Day Visits report: a profile of overseas holiday visitors who take day trips to and from the UK's cities and towns

July 2018

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Introduction

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.

This report draws upon additional questions placed on the **2016 IPS**, designed to provide information on the quantity of '**day trips**' from cities / towns that overseas holiday visitors stayed in for at least one night.

This fills a longstanding insight gap for the UK's destinations which, to date, have only had access to information relating to overseas visitors staying overnight in their cities / towns. This report enables destinations to quantify volumes of overseas holiday day trippers to their cities / towns and understand who they are and where they are staying in the UK. It builds on from the day trips report produced to support the Discover England Fund in 2017, which looked at day trips taken in England amongst inbound holiday visitors. This report expands that analysis across the UK; it focuses primarily on holiday visitors, although the opening pages summarise day trips by visitors of all purposes of visit to the UK.

The nature in which the information was collected means there are some challenges in analysing the data for this report. For example, although the questionnaire asked overseas visitors to state the city/towns they stayed in and the places they visited on a day trip, it *did not* explicitly link the two. Therefore, when day trippers stayed in more than one city/town on their stay, it is not possible to deduce which town/city they travelled from for their stated day trip destination/s. To overcome this, data that links day tripper origin and destination only uses data from visitors who stayed overnight at one location only. This makes up the vast majority of overseas visitors to the UK (83% in total), so we can confidently assume that our results are representative of all overseas visitors.

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

Throughout the report we use the terms 'day trips' and 'day trippers'. 'Day trips' refers to all of the individual day trips taken by overseas holiday visitors, meaning individual people can be counted multiple times. 'Day trippers' refers to individual people that have taken day trips, meaning that regardless of the number of day trips they have taken, they can only be counted once.

Definitions

The following questions were asked for each city / town an overseas visitor stayed in for at least one night:

- How many day visits did you take from...(CITY / TOWN)?
- Which towns were your five most recent day visits made to?

The questions asked foreign resident respondents who spent at least one night in the UK (and whose total length of trip was 6 weeks or less) the number of day visits they took whilst staying in each town. For each town a maximum of 10 day visits could be recorded. For those staying in London, a day trip could not include journeys within London.

The day trips data refers to the nearest town or village to where a visitor went.

The definition of a day trip was that a minimum of 1 hour must have been spent in the day trip destination, and the visit was for a particular purpose, but the visitor did not stay overnight (as overnight visitors would be counted within the standard IPS destination statistics). All day visits taken whilst on an overnight coach tour were excluded from the number.

Because of these exclusions and maximums, the true number of total day trips taken by inbound visitors will be higher than in this report. The numbers shown on subsequent slides are indicative but give a guide to the scale and distribution of day trips by inbound visitors to the UK.



Executive Summary

Executive summary 1/5

What is the size and profile of the day trips market among all types of overseas visitors?

- 6,411k overseas visitors to the UK take at least one day trip to a different destination from a city / town where they are staying overnight during their visit – 17% of all visitors. This generates a total of 11,934k day trips, with each day tripper making an average of 1.9 day trips from the place(s) where they are staying.
- Holiday visitors make the highest proportion of day trips (5,882k) and day-trippers (2,894k), followed by VFR (visiting friends or relatives), business visitors and those visiting for study/miscellaneous reasons. As a proportion of all visitors, business visitors were the least likely to take a day-trip, 6% doing so, compared to 21% of holiday visitors, 23% of VFR visitors and 12% of study/misc. visitors.
- London is the leading city/town destination for a day visit for all types of overseas visitors to the UK. Windsor, Brighton/Hove, Oxford and Bath also feature highly across visitor types. *(see pages 15-17 for a full breakdown)*

What is the profile of the day trips market among overseas holiday visitors?

- Whilst around 70% of all holiday visits to the UK involve a stay in London, those staying in London only account for 39% of the 2,894k visitors who take day trips. Furthermore, only 29% of all day trips originate from London.
- 17% of day trippers and 18% of day trips originate in the South East - 12% and 15% originate in the South West.
- Day trippers are more likely to be aged 55 or over (25%) than holiday visitors to the UK overall (19%).
- The 16% of UK visitors arriving in the UK in a private vehicle or coach also represent a much larger 31% of all day trippers. Day trippers from the South East and South West are significantly more likely than average to have arrived by private vehicle or coach (58% and 53% arriving by these modes in each area respectively).

NB: 'Day trips' refers to all of the individual day trips taken by overseas holiday visitors, meaning individual people can be counted multiple times. 'Day trippers' refers to individual people that have taken day trips, meaning that regardless of the number of day trips they have taken, they can only be counted once.

Executive summary 2/5

What is the size and profile of the day trips market among overseas holiday visitors? (contd.)

- Those on a packaged visit to the UK are more likely to take day trips. Although these visitors only represent 14% of visitors to the UK, they account for 25% of all day trippers.
- Relative to their representation among holiday visitors to the UK overall, visitors from France (14% of all day trippers), Germany (14%), USA (15%) and Netherlands (6%) are particularly well represented in terms of day trippers.
- Day trips are more likely to be undertaken during the summer July-September period, when average visit length tends to be longer. Although only 32% of visits are made during these months, these trips account for 38% of all day trippers.
- **The report (pages 25-33) contains pen portraits of those making day trips from each region of England – except East Midlands and North East where sample sizes are insufficient for profiling. Scotland and Wales are also included.**

NB: 'Day trips' refers to all of the individual day trips taken by overseas holiday visitors, meaning individual people can be counted multiple times. 'Day trippers' refers to individual people that have taken day trips, meaning that regardless of the number of day trips they have taken, they can only be counted once.

Executive summary 3/5

What is the profile of those taking day trips to each destination?

- Overseas visitors who take day trips to **London** are more likely than overseas day trippers as a whole to be younger (aged 16-34 years), arriving in the UK by coach, on a packaged trip, staying less than 7 nights, from France or Germany and be visiting in the January to June period.
- Overseas visitors who take day trips to **Windsor / Berkshire** are more likely than overseas day trippers as a whole to be middle aged (35-54 yrs), arriving in the UK on foot (mainly rail) and be visiting from the USA or other non-core origin markets.
- Overseas visitors who take day trips to **Oxford / Oxfordshire** are more likely than overseas day trippers as a whole to be female, arriving in the UK on a coach or on foot (mainly rail), on a short break of 1-3 nights, from France, visiting in the off-peak October to March period and be on a packaged trip.
- Overseas visitors who take day trips to **Brighton / East Sussex** are more likely than overseas day trippers as a whole to be younger (aged under 35 yrs) . They are also more likely than average to arrive in the UK by coach, to be from France or to be on a packaged trip.
- 18% (42k) of **Kent** day trippers visit **Dover**. Overseas visitors who take day trips to **Canterbury** are more likely than overseas day trippers as a whole to be younger (aged under 35 yrs) – **Canterbury** only, arriving in the UK by coach (especially **Canterbury**) or private vehicle, be staying 1-7 nights, from France or Germany (especially **Canterbury**), visiting in Apr-Jun or be on a packaged trip
- Overseas visitors who take day trips to **Bath / Somerset** are more likely than overseas day trippers as a whole to be aged 35-54, arriving in the UK on foot (mainly rail), from Australia, visiting during the peak July to September period and on a packaged trip.
- Overseas visitors who take day trips to **Salisbury / Wiltshire** are more likely than overseas day trippers as a whole to be older (aged 55 or older), arriving in the UK by coach, staying in the UK for 4-7 nights, from Germany and on a package trip.

Executive summary 4/5

What is the profile of those taking day trips to each destination?

- Overseas visitors who take day trips to **Cambridge / Cambridgeshire** are more likely than overseas day trippers as a whole to be arriving in the UK on foot (mainly rail) and from France, Netherlands or China.
- Overseas visitors who take day trips to **Stratford / Warwickshire** are more likely than overseas day trippers as a whole to be female, arriving in the UK by coach, staying in the UK for 4-7 nights, from France, visiting in the April to June period and on a packaged trip.
- Overseas visitors who take day trips to **York / North Yorkshire** are more likely than overseas day trippers as a whole to be younger (aged under 35yrs), staying in the UK for over 7 nights (especially over 14 nights), visiting in the Jul to Sep period and travelling independently.
- Overseas visitors who take day trips to **Merseyside/Liverpool** are more likely than overseas day trippers as a whole to be male, younger (aged 16-34 years), arriving in the UK by air (39% arriving at Manchester Airport, 10% arriving at Liverpool Airport), staying over 14 nights, be visiting in the April to June period and on an independent trip.
- Overseas visitors who take day trips to **Hampshire** are more likely than overseas day trippers as a whole to be aged 35-54 years, arriving in the UK by coach or private vehicle (52% arrive via a seaport), staying 4-7 nights, from France or Germany and be on a packaged trip. Key day trip destinations in the county for overseas visitors are Portsmouth (46k), Winchester (32k) and Southampton (18k).
- Overseas visitors who take day trips to **Hertfordshire** are more likely than overseas day trippers as a whole to be female, aged under 55 years, arriving in the UK by air (36% Heathrow, 25% Stansted, 20% Gatwick), staying less than 7 nights, from Nordic countries, visiting in the October to December period and be travelling independently.

Executive summary 5/5

What is the profile of those taking day trips to each destination?

- Overseas visitors who take day trips to **Edinburgh** are more likely than overseas day trippers as a whole to be aged 35-54, visiting for 15+ nights and arranging their trip through a package. When looking at overseas visitors who take day trips to **Lothian** region, they are significantly more likely than overseas day trippers as a whole to be older (aged 55 and over), arriving by air and staying 8-14 nights.
- Overseas visitors who take day trips to **Glasgow/ Strathclyde** are more likely than overseas day trippers as a whole to be older (aged 55 and over), arriving by air and arranging their trip via a package holiday.
- Overseas visitors who take day trips to **Highlands** are significantly more likely than overseas day trippers as a whole to be older (aged 35 and over), arriving by air, staying 8-14 nights and visiting between July and September.
- Overseas visitors who take day trips to **Fife** are significantly more likely than overseas day trippers as a whole to be older (aged 55 and over), arriving by air and staying 8-14 nights.
- Overseas day trippers to **Cardiff** are much more likely than overseas day trippers as a whole to be younger (aged 16-34), arriving by coach and arranging via a package holiday. Conversely, when looking at overseas day trippers to Wales, they are more likely than overseas day trippers as a whole to be older (aged 55 over), arrive by private vehicle and arrange the trip independently.



What is the size and profile
of the day trips market
among *all purposes of
overseas visits?*

Data taken from 2016 International Passenger Survey
(IPS)

Overall size of UK 'day trip' market among overseas visitors

Source: IPS 2016

	All visitors	Holiday visitors	VFR visitors	Business visitors	Study/Miscellaneous
Number taking a day trip	6,411k	2,894k	2,644k	511k	362k
% of all visitors	17%	21%	23%	6%	12%
Total number of day trips	11,934k	5,882k	4,658k	793k	601
Number of trips per visitor	4+ trips	10%	13%	8%	8%
	3 trips	13%	15%	11%	9%
	2 trips	23%	23%	23%	20%
	1 trip	55%	49%	58%	64%
Average trips per visitor	1.9	2.0	1.8	1.6	1.7

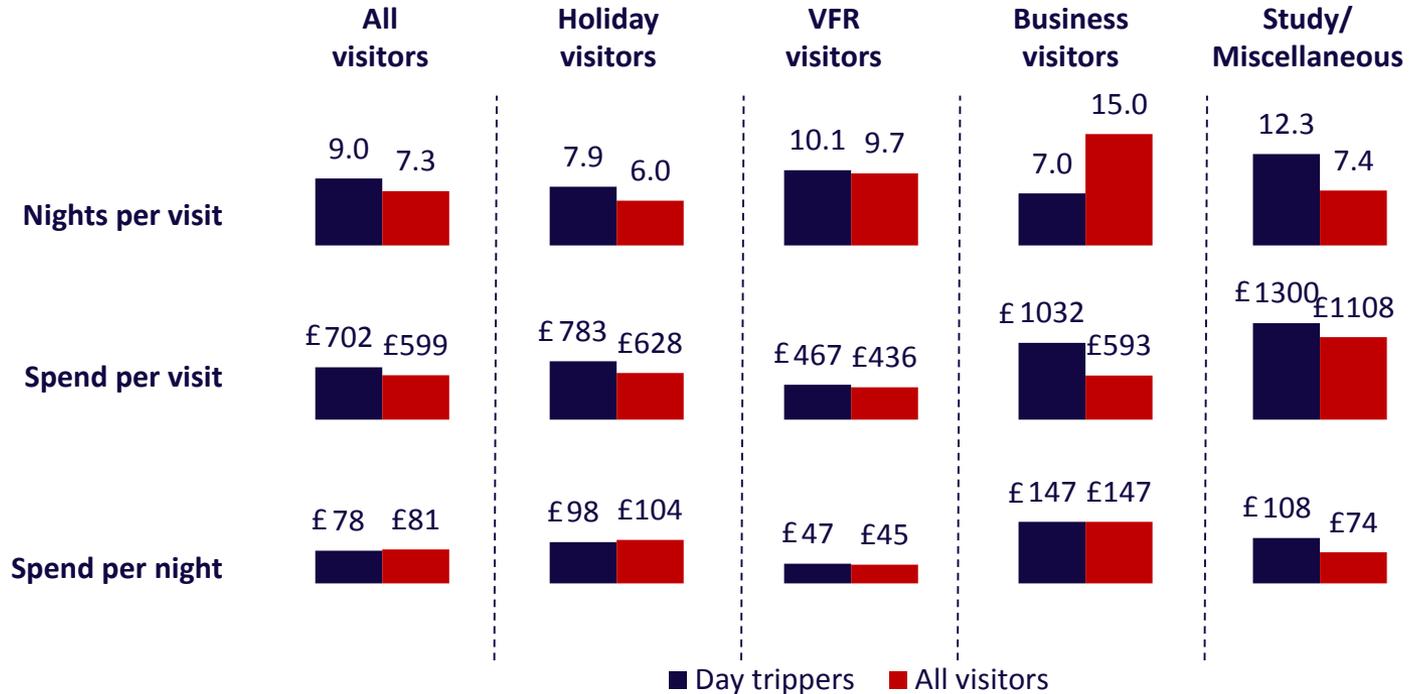
6,411k overseas visitors to the UK take at least one day trip to a different destination from a city / town where they are staying overnight during their visit – 17% of all visitors. This generates a total of 11,934k day trips, with each day tripper making an average of 1.9 day trips.

Holiday visitors make up the highest proportion of day trips (5,882k) and day-trippers (2,894k), followed by VFR (visiting friends or relatives), business visitors and those visiting for study/miscellaneous reasons. Holiday visitors are also the most likely to make more than one day trip whilst in the UK, 51% doing so.

As a proportion of visits, business visitors are the least likely to take a day-trip, 6% doing so, compared to 21% of holiday visitors, 23% of VFR visitors and 12% of study/misc. visitors.

Day trippers' nights and spend per visit

Source: IPS 2016



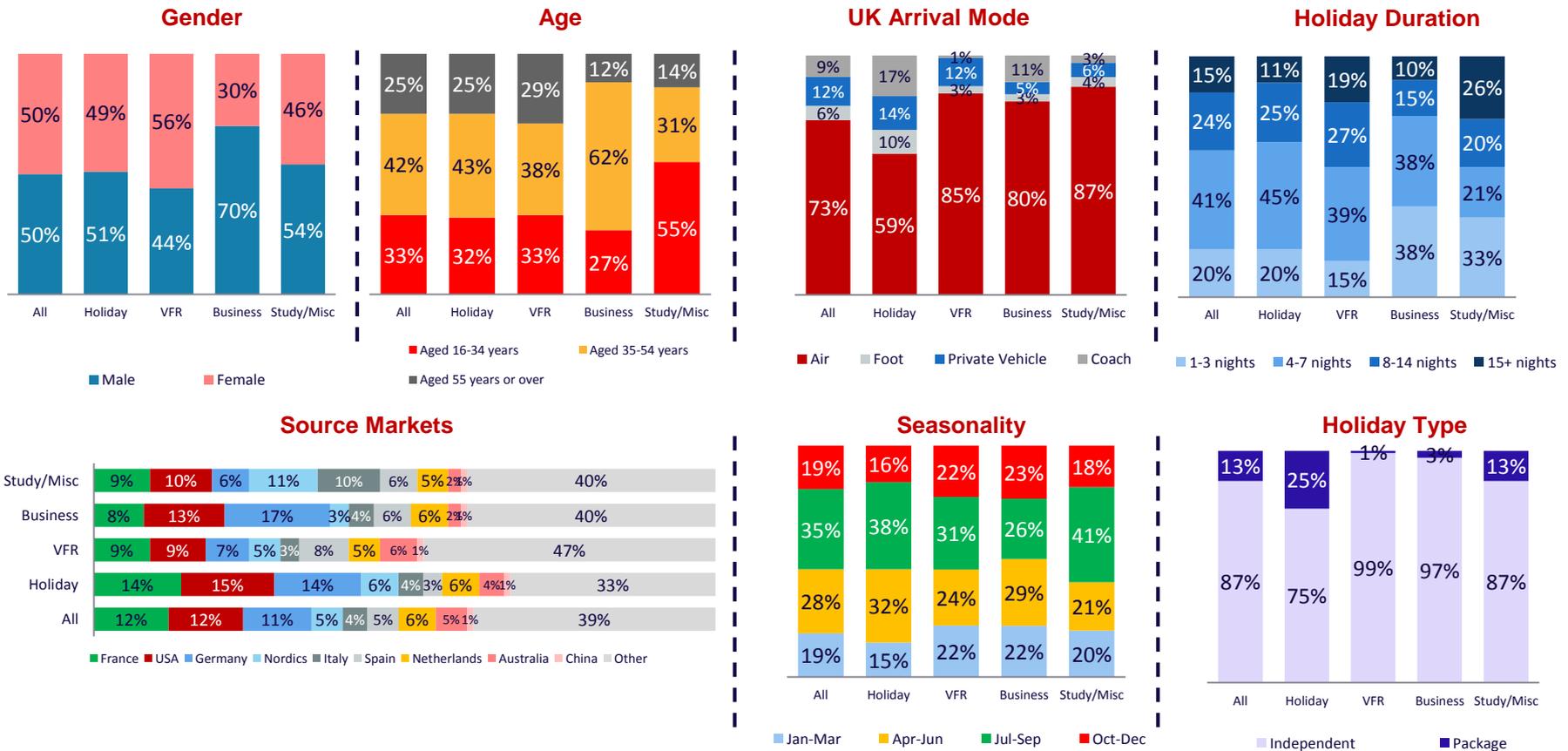
On average, overseas day-trip visitors stayed 9.0 nights in the UK during their visit, with each spending £78 pounds per night. This amounts to £702 spent by day-trippers during their stay in the UK.

Study/Miscellaneous day trippers stay the most number of nights (12.3 nights) during their visit, followed by VFR (visiting friends or relatives), holiday and business visitors. Study/Miscellaneous visitors also have the highest spend (£1,300) whilst in the UK compared with other audiences. However, business visitors show a higher expenditure per night (£147).

Overall, VFR day-trippers are the least likely to spend during their visit to the UK (£47 per night; £467 per visit) compared to other visitor types.

Profile summary of overseas 'day trippers' by visitor purpose

The profile of day-tripper varies significantly across different visitor purposes. Gender is split fairly evenly, although business day trippers are significantly more likely to be male. Business visitors are also significantly more likely to be aged 35-54, whilst those visiting for study/misc. are significantly more likely to be aged 16-34.



Top Cities/Towns visited on a day-trip by all visitors (Top 60)

The below chart illustrates the top 60 cities/towns visited on a day-trip for all visitors. London (1183k), Windsor (484k) and Brighton/Hove (438k) are the most popular destinations among day-trippers in 2016.

Source: IPS 2016

All Visitors (000s)	
London	1183
Windsor	484
Brighton/Hove	438
Oxford	423
Bath	419
Cambridge	267
Edinburgh	202
Canterbury	201
Salisbury	201
Birmingham	153
Liverpool	148
Glasgow	146
Watford	145
Manchester	144
York	129
Stratford-upon-Avon	125
Bristol	120
St Andrews	110
Cardiff	108
Portsmouth / Southsea	95

All Visitors (000s)	
Stirling	92
Hastings	86
Leeds	83
Amesbury	76
Chester	74
Dover	60
Winchester	58
Bicester	53
Southampton	52
Warwick	50
Perth	49
Nottingham	48
Blackpool	47
Inverness	46
Coventry	45
Exeter	45
Eastbourne	44
Newcastle	40
Scarborough	40
Leicester	39

All Visitors (000s)	
Bourton-on-the-Water	36
Maidstone	36
Bournemouth	33
Guildford	33
North Berwick	33
Lincoln	32
Chichester	31
Harrogate	31
Brixham / Paignton / Torbay / Torquay	31
Sheffield	31
Whitby	31
Plymouth	30
Sevenoaks	30
Avebury	29
Arundel	29
Cheltenham	28
Belfast	28
St Ives	27
Reading	26
Mallaig	25

Top Cities/Towns visited on a day-trip by holiday visitors (Top 60)

The below chart illustrates the top 60 cities/towns visited on a day-trip by *holiday* visitors. London (452k), Windsor (360k) and Oxford (285k) are the most popular destinations among holiday day-trippers in 2016.

Holiday Visitors (000s)	
London	452
Windsor	360
Oxford	285
Bath	253
Brighton/Hove	221
Cambridge	160
Canterbury	146
Salisbury	140
Watford	105
Edinburgh	95
Glasgow	92
St Andrews	69
Liverpool	69
Stratford-upon-Avon	68
Stirling	68
Bristol	58
Amesbury	57
Hastings	56
York	54
Cardiff	53

Holiday Visitors (000s)	
Portsmouth / Southsea	46
Dover	43
Birmingham	43
Winchester	32
Manchester	32
Inverness	31
Bicester	31
Eastbourne	29
Perth	27
Chester	27
Warwick	26
North Berwick	25
Maidstone	23
Exeter	23
Fort William	23
Mallaig	23
Avebury	23
Plymouth	22
Blackpool	21
Land's End / Sennen	20

Holiday Visitors (000s)	
Southampton	18
Brixham / Paignton / Torbay / Torquay	18
Scarborough	17
St Ives	16
Bourton-on-the-Water	16
Bournemouth	16
Truro	15
Conwy	15
Glencoe	15
Penzance	14
Pitlochry	14
Tunbridge Wells	14
Dundee	14
Aviemore	14
Cirencester	13
Rye	13
Poole	13
Whitby	13
Reading	13
Weymouth	13

Top Cities/Towns visited on a day-trip by VFR visitors (Top 60)

London (535k), Brighton/Hove (165k) and Bath (130k) are the top 3 cities/towns most likely to be visited by VFR day-trippers in 2016.

VFR Visitors (000s)	
London	535
Brighton/Hove	165
Bath	130
Windsor	98
Edinburgh	94
Oxford	85
Birmingham	85
Manchester	81
Cambridge	71
York	63
Liverpool	56
Leeds	54
Glasgow	48
Stratford-upon-Avon	47
Bristol	44
Cardiff	43
Portsmouth / Southsea	40
Chester	40
Salisbury	39
Nottingham	37

VFR Visitors (000s)	
St Andrews	32
Newcastle-upon-Tyne	31
Canterbury	31
Watford	31
Lincoln	26
Coventry	23
Blackpool	22
Stirling	22
Southampton	21
Leicester	19
Bradford	19
Winchester	18
Sheffield	18
Guildford	17
Harrogate	17
Durham	17
Warwick	17
Perth	17
Hastings	16
Scarborough	16

VFR Visitors (000s)	
Bournemouth	16
Exeter	16
Bourton-on-the-Water	16
Chichester	16
Whitby	15
Norwich	14
Brixham / Paignton / Torbay / Torquay	13
Inverness	13
Windermere	13
Keswick	12
Ayr	12
Dover	12
Derby	12
Sevenoaks	12
Arundel	12
Bicester	11
Hull & Kingston-upon-Hull	11
Carlisle	11
Amesbury	11
Belfast	10

Source: IPS 2016

Top Cities/Towns visited on a day-trip by business and study/misc. visitors (Top 20)

Source: IPS 2016

London (105k), Brighton/Hove (32k) and Oxford (32k) are the most visited cities/towns by business and study/miscellaneous visitors on a day-trip.

Business Visitors (000s)	
London	105
Brighton/Hove	32
Oxford	32
Cambridge	21
Birmingham	18
Bath	17
Windsor	17
Canterbury	14
Bristol	14
Manchester	13
Hastings	10
Leeds	10
Coventry	9
St Andrews	8
Salisbury	8
Edinburgh	8
Winchester	8
Southampton	8
York	7
Bicester	7

Study/Misc. Visitors (000s)	
London	91
Brighton/Hove	21
Oxford	20
Bath	19
Manchester	18
Liverpool	18
Cambridge	14
Salisbury	13
Canterbury	10
Windsor	10
Cheltenham	9
Cardiff	7
Leicester	7
Birmingham	6
York	5
Southampton	5
Edinburgh	5
Bristol	5
Chester	5
Arundel	5

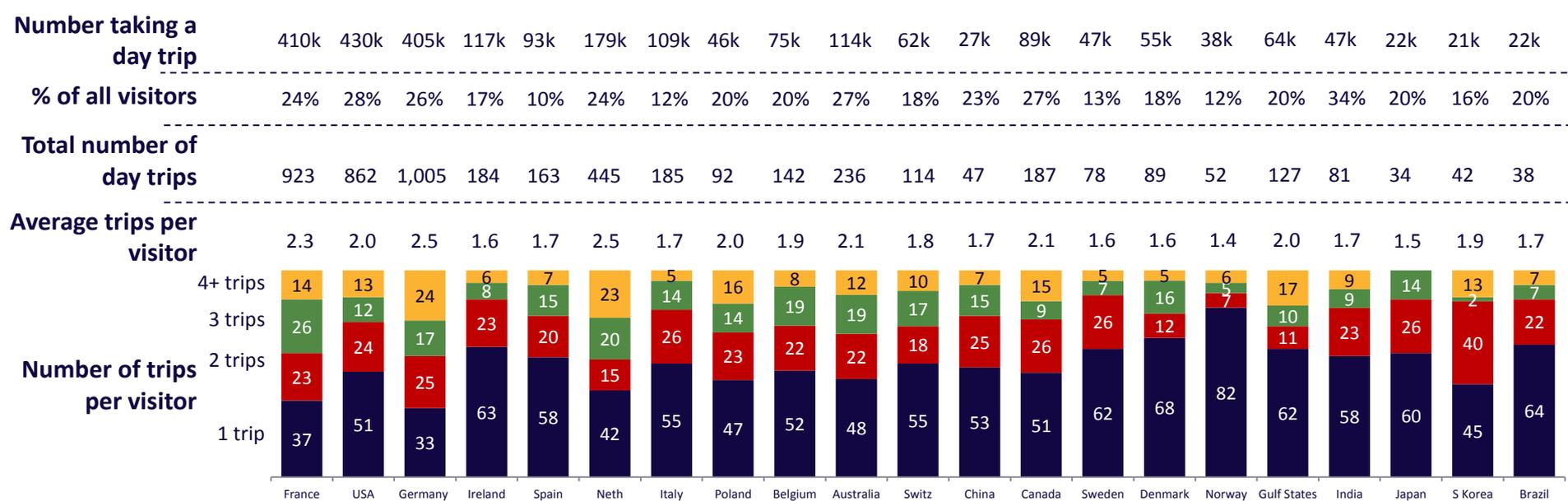


What is the profile of the day trips market among overseas *holiday* visitors?

Data taken from 2016 International Passenger Survey
(IPS)

Market summary for holiday day-trippers

Source: IPS 2016



The above chart illustrates the profile of holiday day-trippers visiting the UK split by market.

For example, 405k holiday visitors from Germany take at least one day trip whilst visiting the UK - 26% of all German visitors to the UK. They generate 1,005k day trips, with each visitor making an average of 2.5 day trips.

Where do overseas holiday 'day trippers' stay in the UK? *Day trippers*

Source: IPS 2016

Day tripper origin by region (top chart) and % of holiday visitors to this region taking a day trip (percentages)



The above chart illustrates where the richest sources of day trippers are staying when they visit the UK.

The highest number (1,130k) stay in London, followed by the South East (513k), Scotland (429k) and the South West (340k). Despite hosting the highest *number* of day trippers, London hosts the lowest *proportion* of day trippers compared to the total number of visitors staying there. Holiday visitors to the South West (35%) and the South East (34%) have the highest *proportion* of day trippers.

Where do overseas holiday 'day trippers' stay in the UK? *Day trips*

Source: IPS 2016

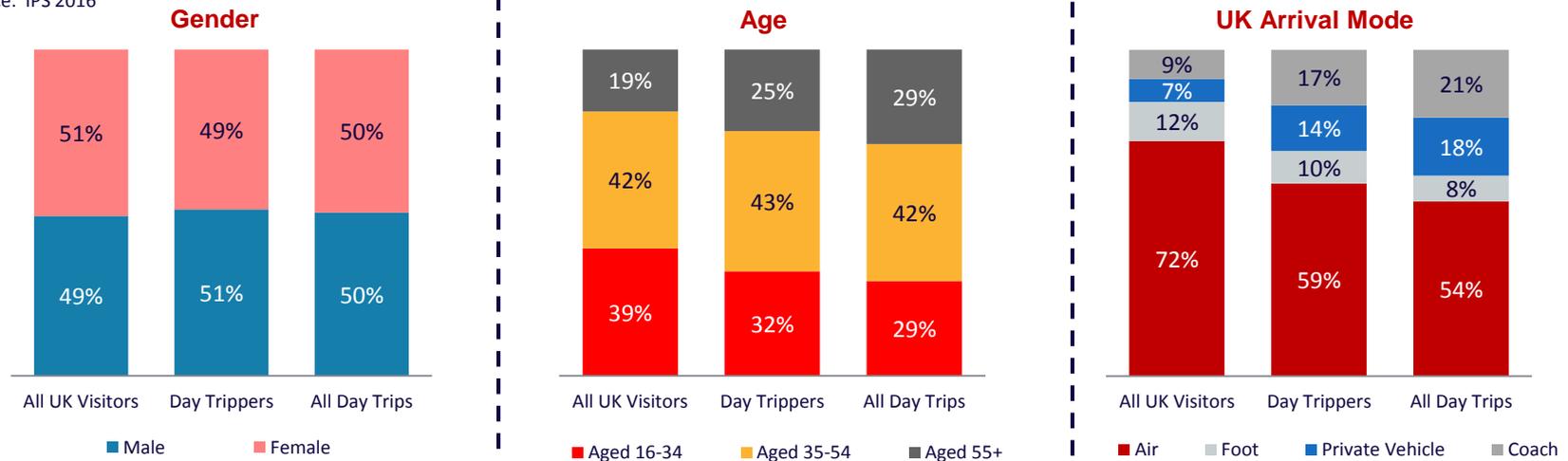
Volume of all day trips by region stayed in



As well as hosting the highest number of *day trippers*, London also hosts the highest number of *day trips* (1,703k), following by the South East (1,132k), Scotland (924k) and the South West (885k). That said, the gap between London and the rest of the UK in day trips is smaller than in day trippers, suggesting that London holiday visitors take fewer day trips on average.

Profile of overseas holiday 'day trippers' in the UK – gender, age, arrival mode

Source: IPS 2016



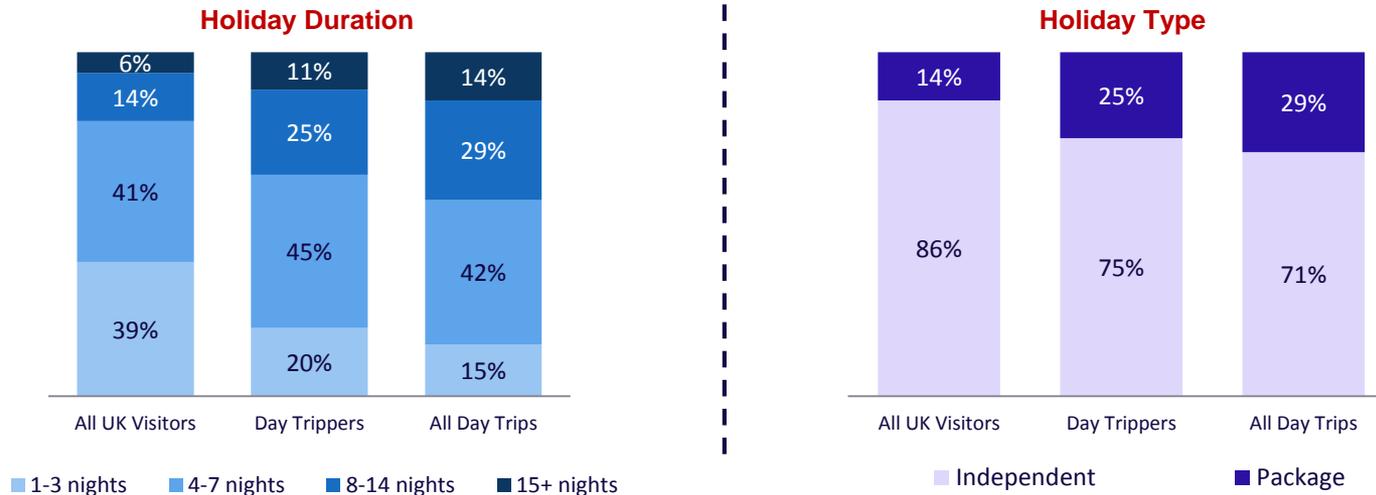
The above chart compares the profile of all overseas holiday visitors to the UK against the profile of individuals who take day trips when in the UK and the profile of all day trips e.g. if one visitor takes two day trips then they are counted twice in the profile.

Day trippers are significantly more likely to be aged 55 or over than holiday visitors to the UK overall, with 25% of all day trippers being aged 55 or over compared with only 19% of UK visitors overall. Driven by the fact that day trippers aged over 55 take more day trips on average than those aged younger, over 55s account for 29% of all day trips.

The 16% of UK visitors arriving in the UK in a private vehicle or coach also represent a significantly larger 39% of all day trips made. Targeting those arriving via these modes of transport will be key to driving day trips, particularly for destinations in the South East (58%) and South West of England (53%).

Profile of overseas holiday 'day trippers' in the UK – visit duration

Source: IPS 2016



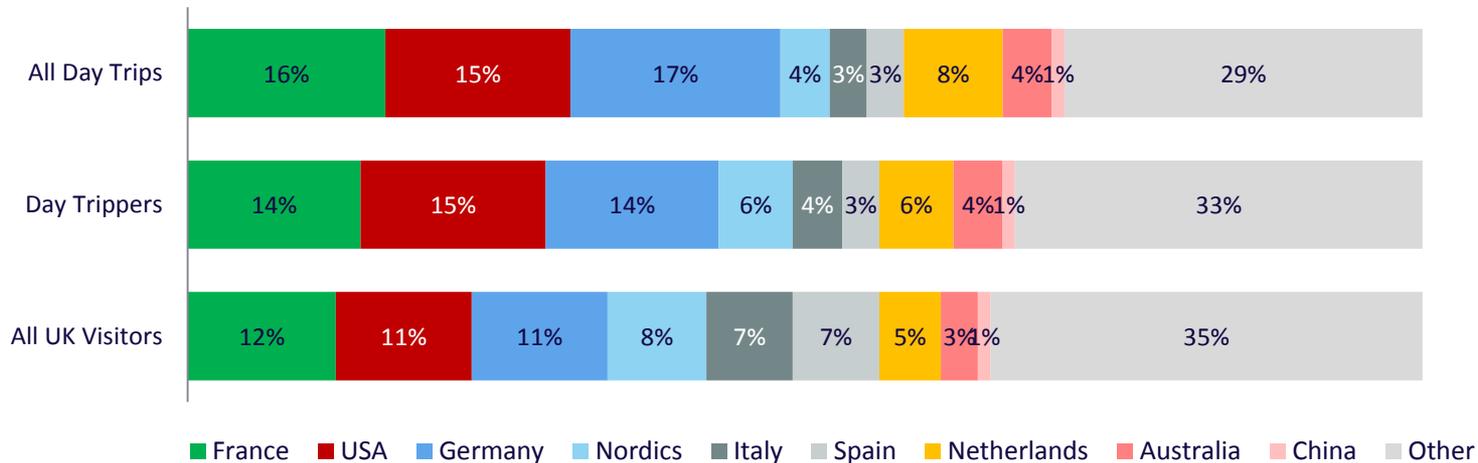
Day trips really become prevalent among holiday visitors staying in the UK for over 7 nights. These visitors account for 43% of all day trips, significantly higher than the 20% amongst all visitors to the UK. That said, those staying 4-7 nights still account for the highest proportion of day trips (42%), a reflection of the fact that this length of stay is the most common among UK visitors.

Day trips are unlikely to be taken by those staying less than 4 nights in the UK – they represent 39% of all visitors to the UK but only 15% of day trips, a significantly lower amount.

Day trippers are significantly more likely than UK visitors on the whole to be on a package holiday. Although these visitors only represent 14% of visitors to the UK, they account for 29% of all day trips.

Source markets for overseas holiday 'day trippers'

Source: IPS 2016

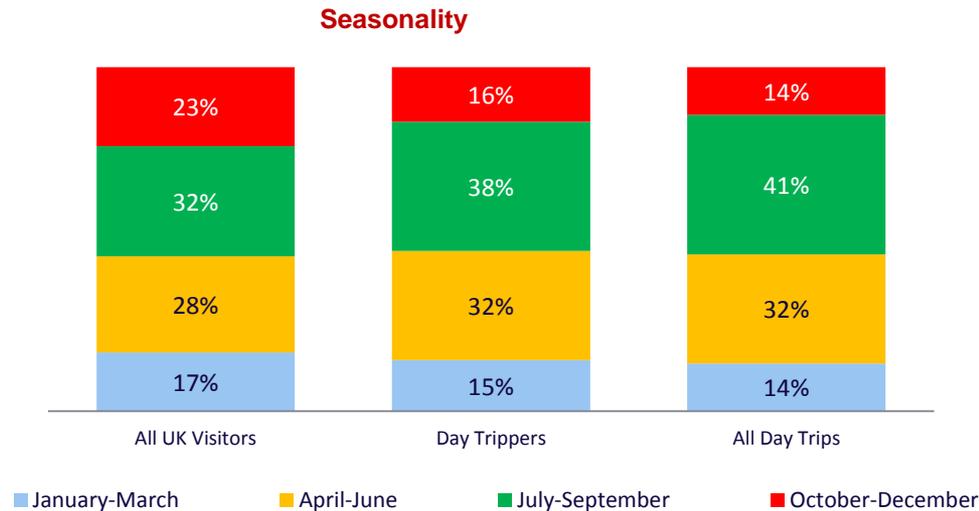


Relative to their representation among holiday visitors to the UK overall, visitors from France (16% of all day trips), Germany (17%), USA (15%) and Netherlands (8%) are particularly well represented in terms of day trippers. Between them, these markets account for well over half of all day trips made by overseas holiday visitors in the UK.

Conversely, visitors from Italy and Spain account for only 6% of all day trips, despite representing 14% of all visitors to the UK.

Profile of overseas holiday 'day trippers' in the UK – seasonality

Source: IPS 2016



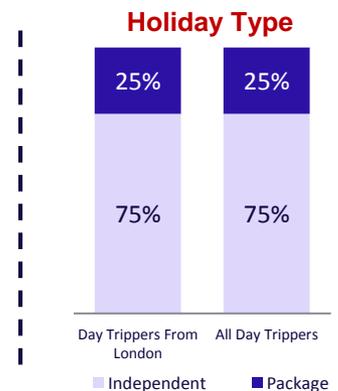
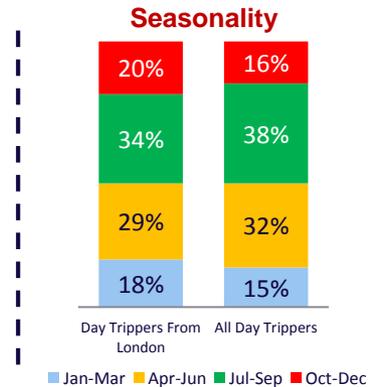
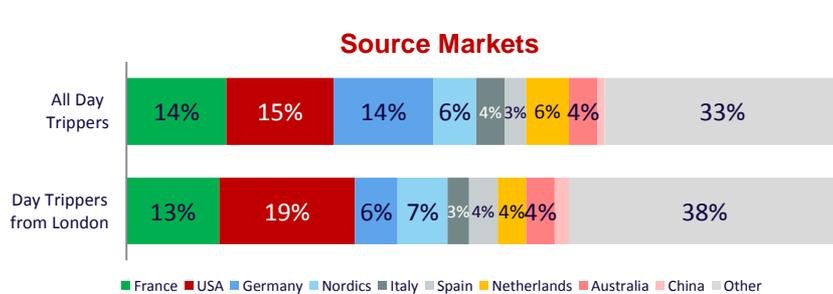
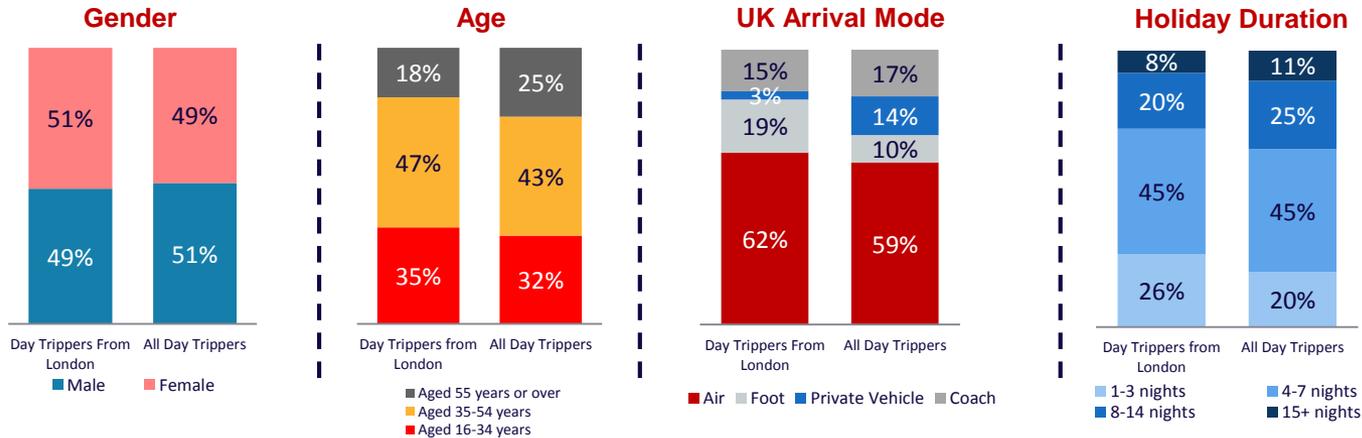
Day trips are more likely to be undertaken during the summer July-September period, when average visit length tends to be longer. Although only 32% of visits are made during these months, these trips account for 41% of all day trips taken. Conversely, the October-December period is the least likely to see day trips being taken. Almost a quarter (23%) of visits to the UK are made during this period but only 14% of all day trips are made during this time.

Summary of overseas holiday 'day trippers' staying in LONDON

Overseas visitors who take day trips from London are significantly more likely than overseas day trippers as a whole to be under the age of 55, arriving on foot (mainly rail), from the US and staying in the winter months.

Source: IPS 2016

LONDON
(1,130k
day trippers)

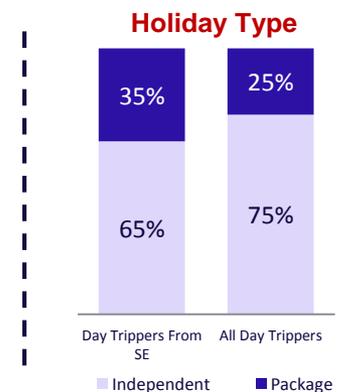
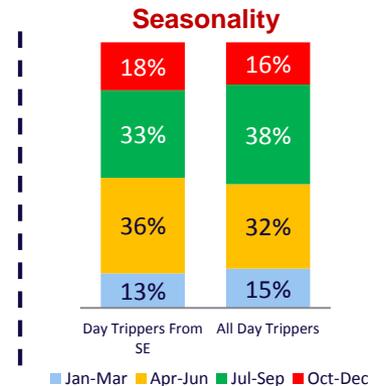
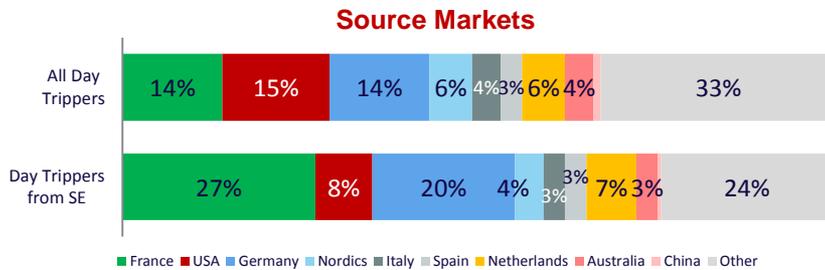
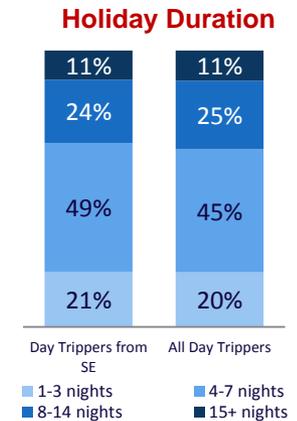
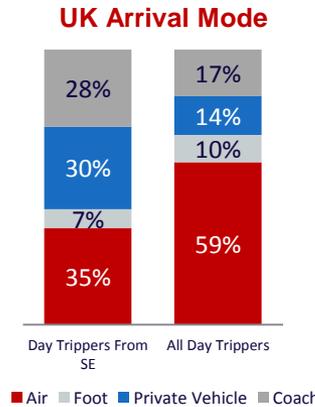
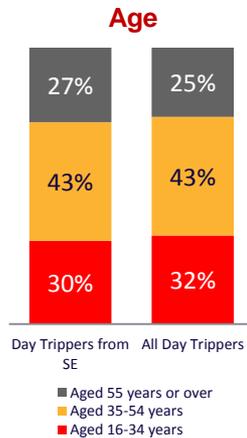
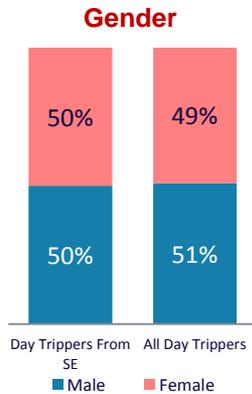


Summary of overseas holiday 'day trippers' staying in SOUTH EAST

Overseas visitors who take day trips from places in the South East are significantly more likely than overseas day trippers as a whole to be arriving by coach or private vehicle (47% arrive via seaports), from France and Germany and be on a packaged holiday.

Source: IPS 2016

SOUTH EAST
(513k day trippers)

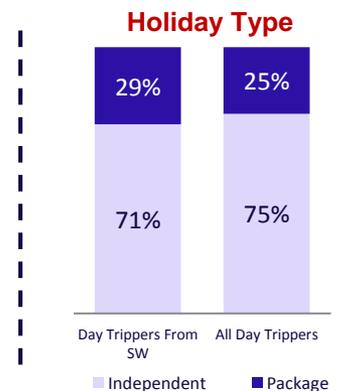
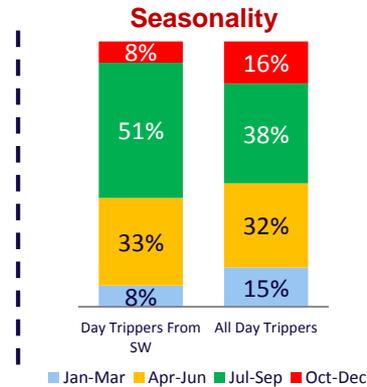
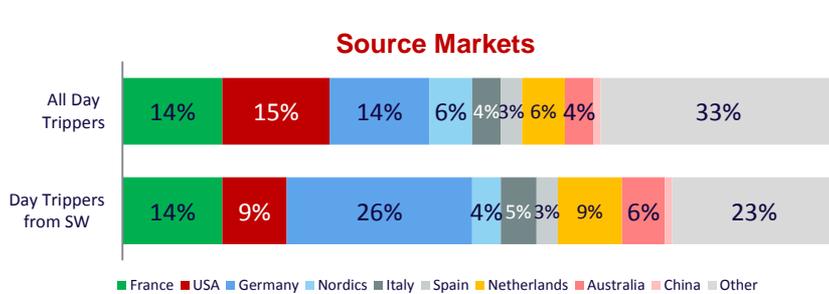
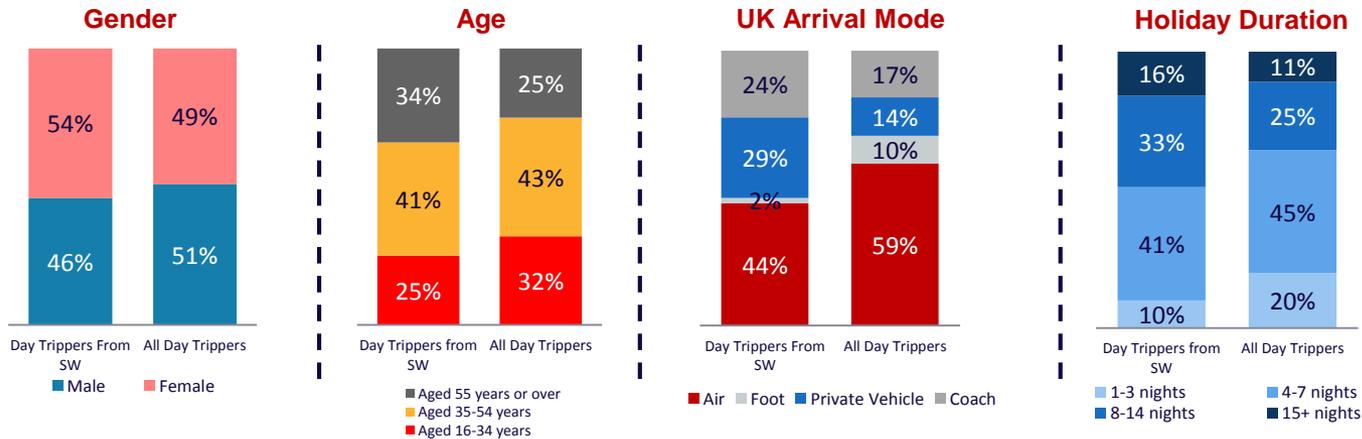


Summary of overseas holiday 'day trippers' staying in SOUTH WEST

Overseas visitors who take day trips from places in the South West are significantly more likely than overseas day trippers as a whole to be aged 55+, arriving by private vehicle or coach (47% arrive via seaports*), staying for longer than 7 nights, from Germany and to be visiting during the summer July-September period.

Source: IPS 2016

SOUTH WEST
(340k day trippers)



Day trip market size & profile

*NB. This data is from the data tables and included in the commentary as useful context

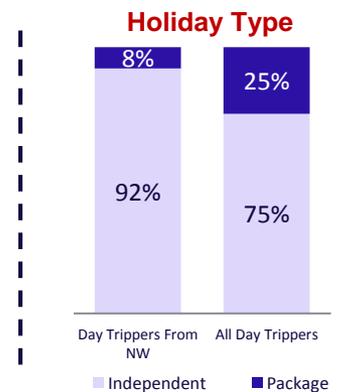
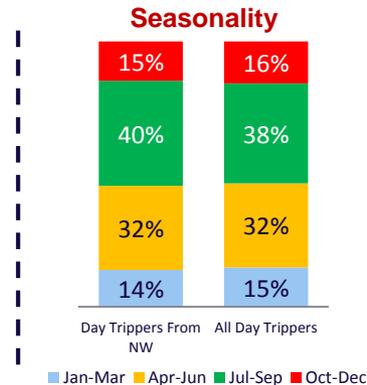
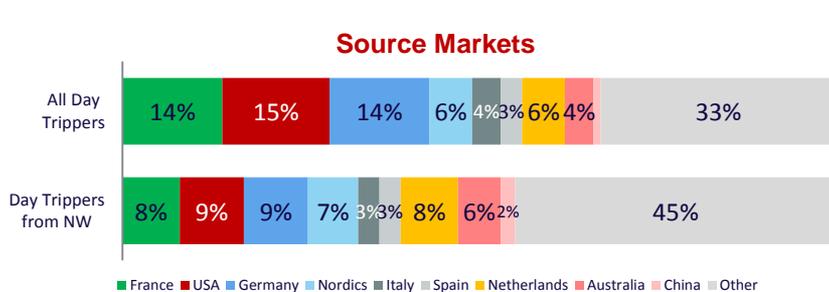
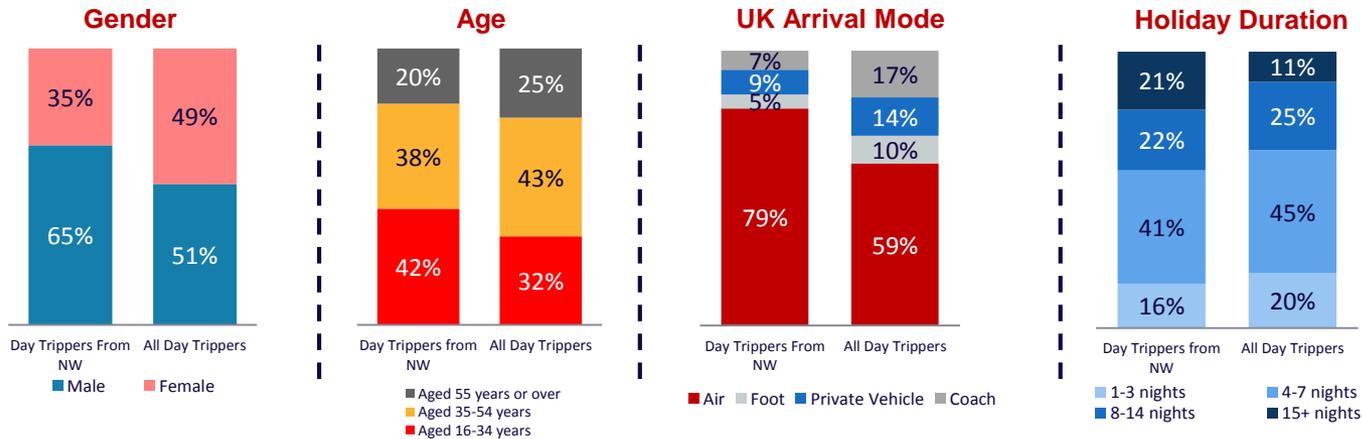
Summary of overseas holiday 'day trippers' staying in NORTH WEST

Caution: Small regional base size (186 respondents)

Overseas visitors who take day trips from places in the North West are significantly more likely than overseas day trippers as a whole to be male, younger, arriving by air (47% arrive at Manchester Airport and 15% at Liverpool Airport), be staying for longer than 14 nights, be from countries other than the core target markets and be organising their trip independently.

Source: IPS 2016

NORTH WEST
(130k day trippers)



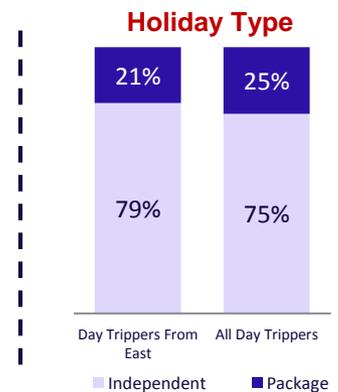
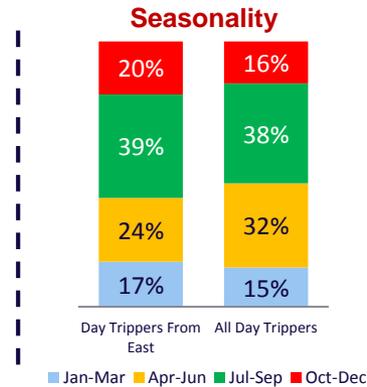
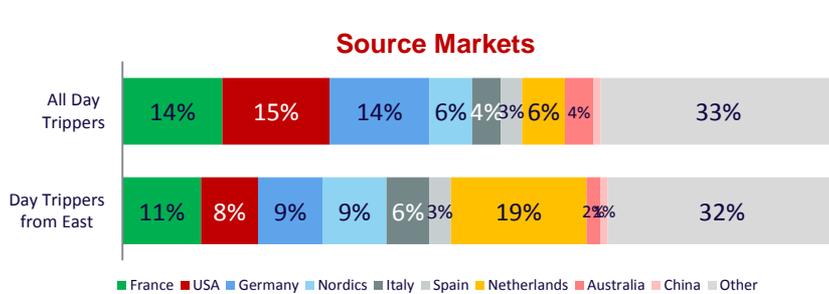
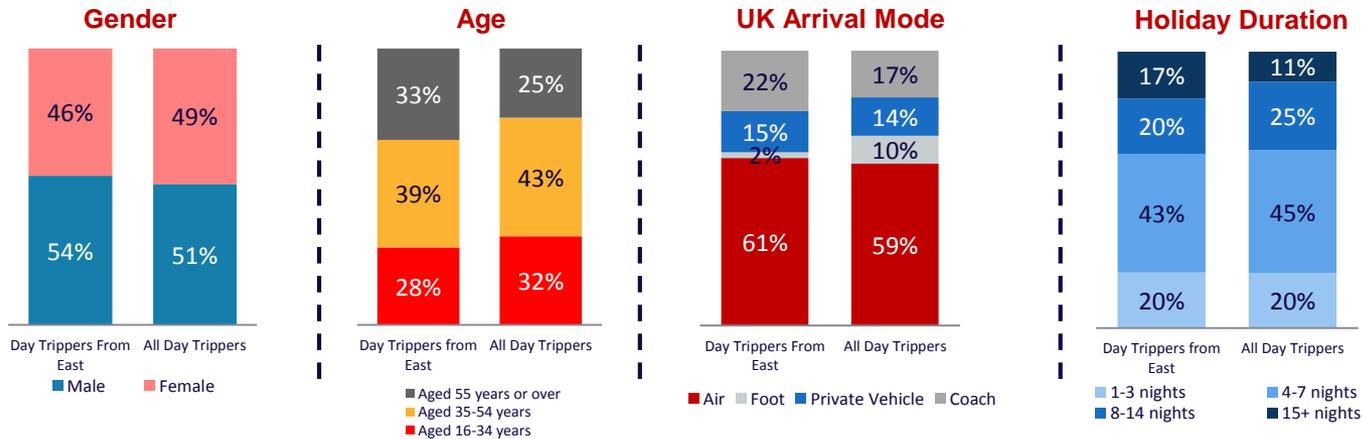
Summary of overseas holiday 'day trippers' staying in the EAST

Caution: Small regional base size (137 respondents)

Overseas visitors who take day trips from places in the East of England are more likely than overseas day trippers as a whole to be older, arrive by coach (29% arrive via a seaport*), staying for over 14 nights, and visiting during the winter months. They are significantly more likely to be from the Netherlands.

Source: IPS 2016

EAST OF ENGLAND
(127k day trippers)



Day trip market size & profile

*NB. This data is from the data tables and included in the commentary as useful context

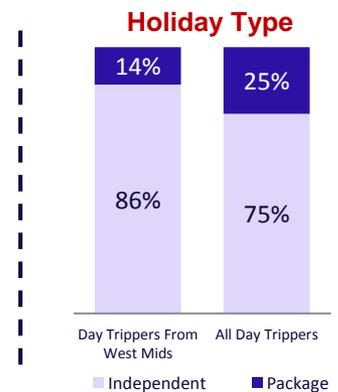
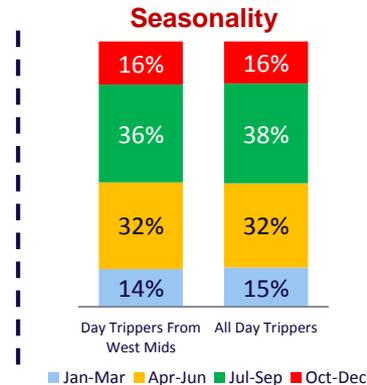
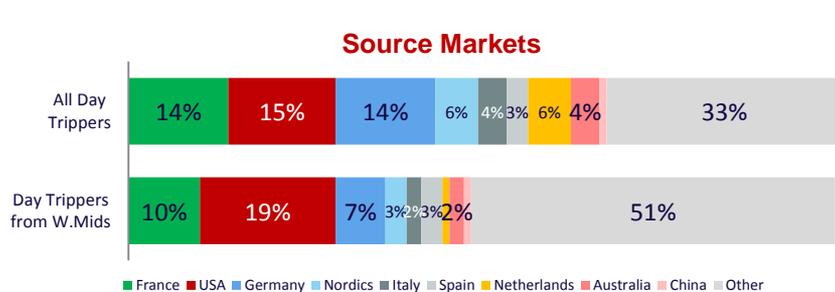
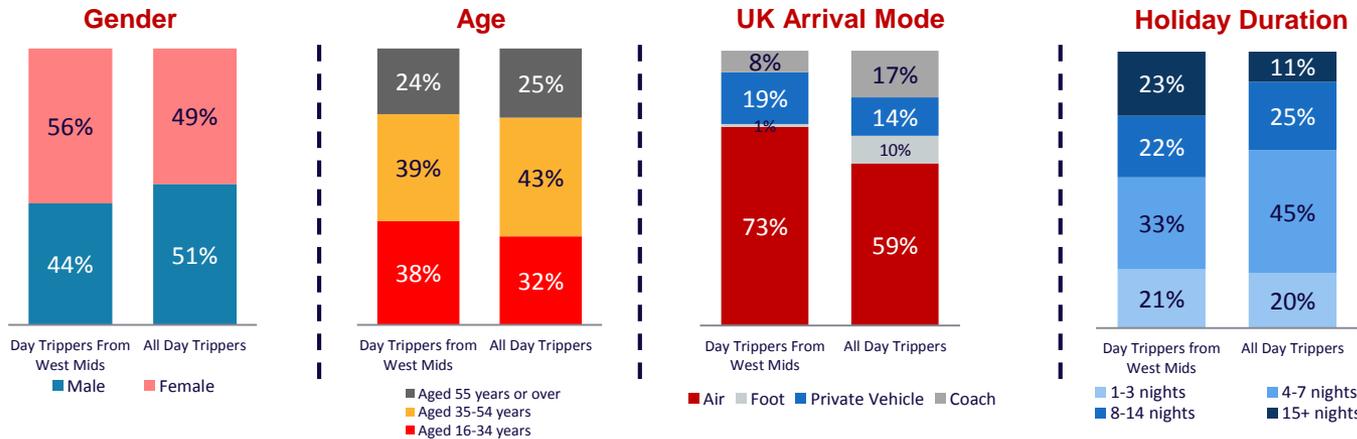
Summary of overseas holiday 'day trippers' staying in the WEST MIDS

Caution: Small regional base size (93 respondents)

Overseas visitors who take day trips from places in the West Midlands are significantly more likely than overseas day trippers as a whole to be arriving by air (38% arrive at Birmingham Airport, 18% at Heathrow), staying for over 14 nights, from outside the core source markets and be organising their trip independently.

Source: IPS 2016

WEST MIDLANDS (91k day trippers)



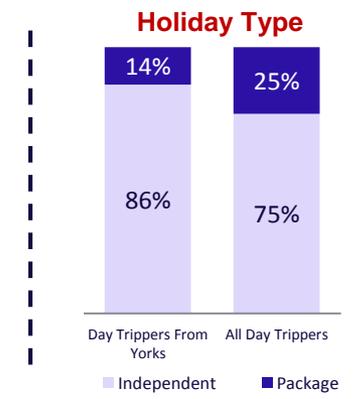
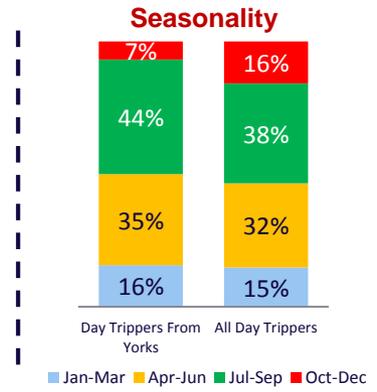
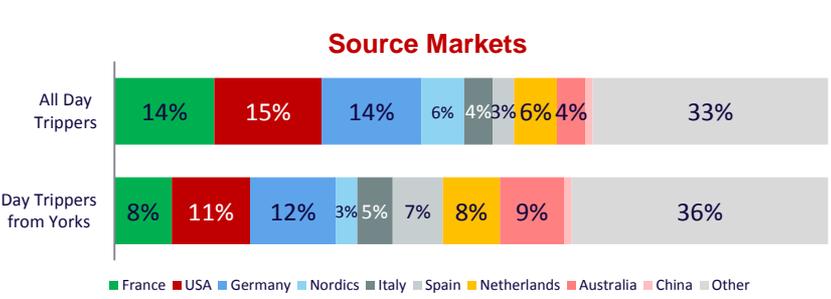
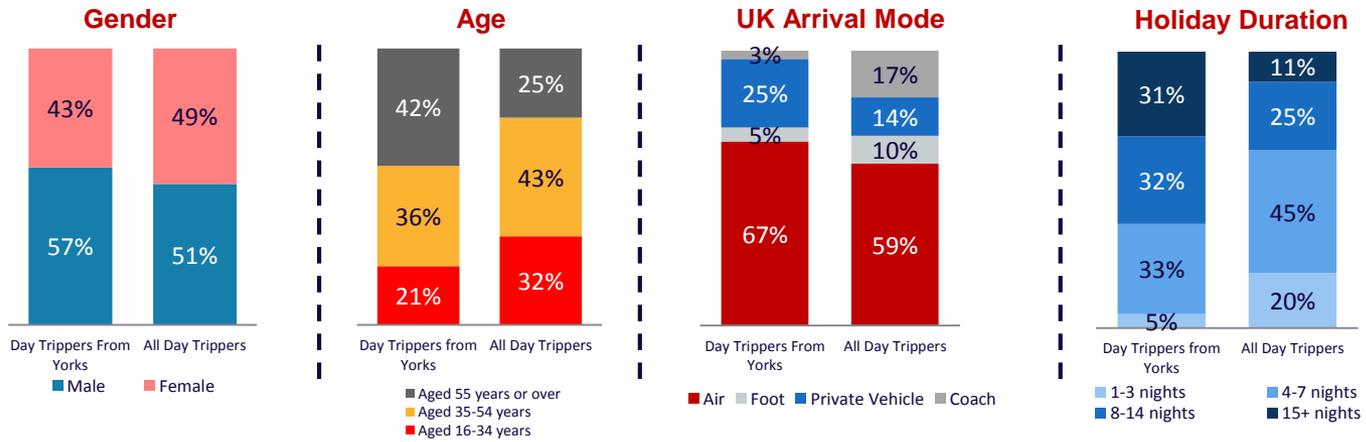
Summary of overseas holiday 'day trippers' staying in YORKSHIRE

Caution: Small regional base size (116 respondents)

Overseas visitors who take day trips from places in Yorkshire are significantly more likely than overseas day trippers as a whole to be arriving by older (aged 55 or over), arriving in a private vehicle (28% arrive via a seaport*), staying for at least 7 nights and usually over 14 nights and arranging their trip independently.

Source: IPS 2016

YORKSHIRE
(75k day trippers)



Day trip market size & profile

*NB. This data is from the data tables and included in the commentary as useful context

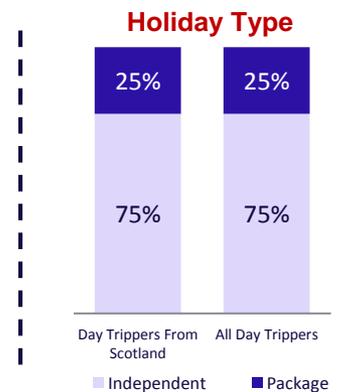
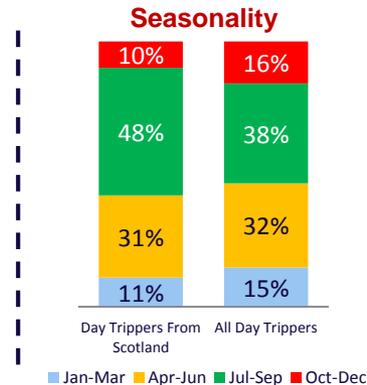
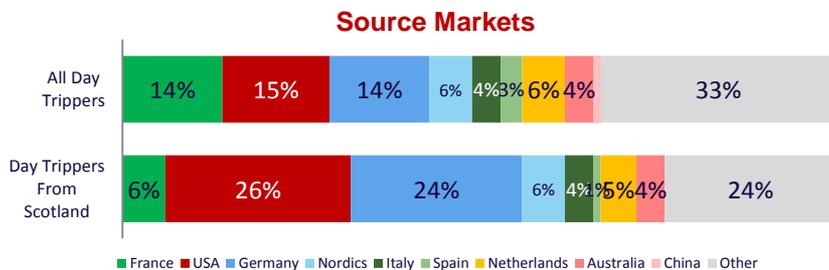
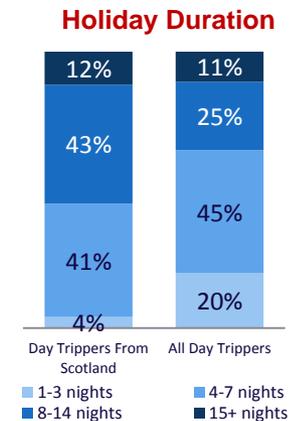
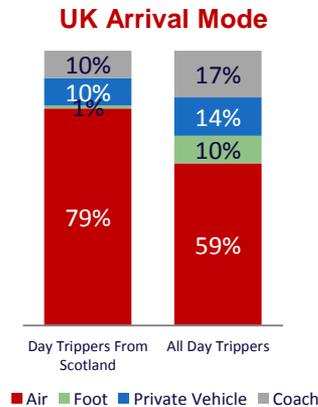
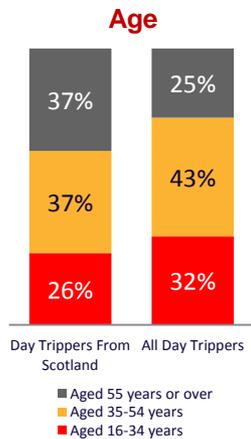
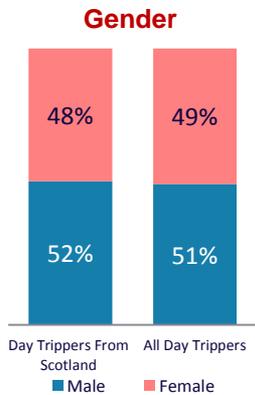
Summary of overseas holiday 'day trippers' staying in SCOTLAND

Caution: Small regional base size (464 respondents)

Overseas visitors taking day trips from areas in Scotland are more likely than all overseas day trippers to be older (aged 55 and over), from the USA or Germany, arriving by air and staying 8-14 nights. These overseas visitors are more likely to take day trips from Scotland in July-September time compared to overseas day trippers as a whole.

Source: IPS 2016

SCOTLAND
(429k
day trippers)



Day trip market size & profile

*NB. This data is from the data tables and included in the commentary as useful context

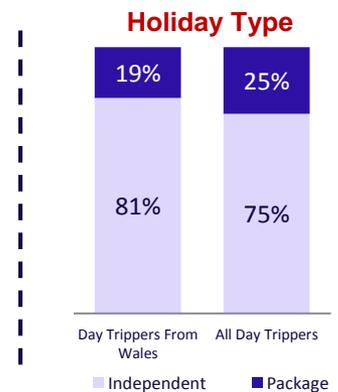
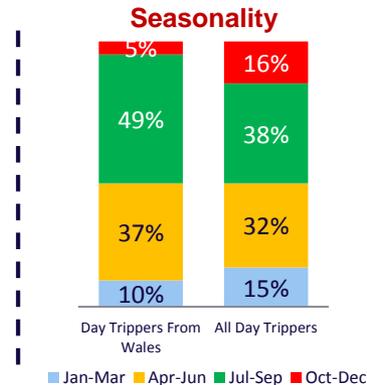
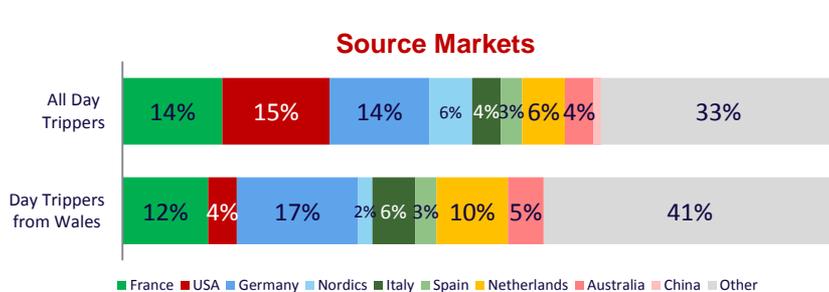
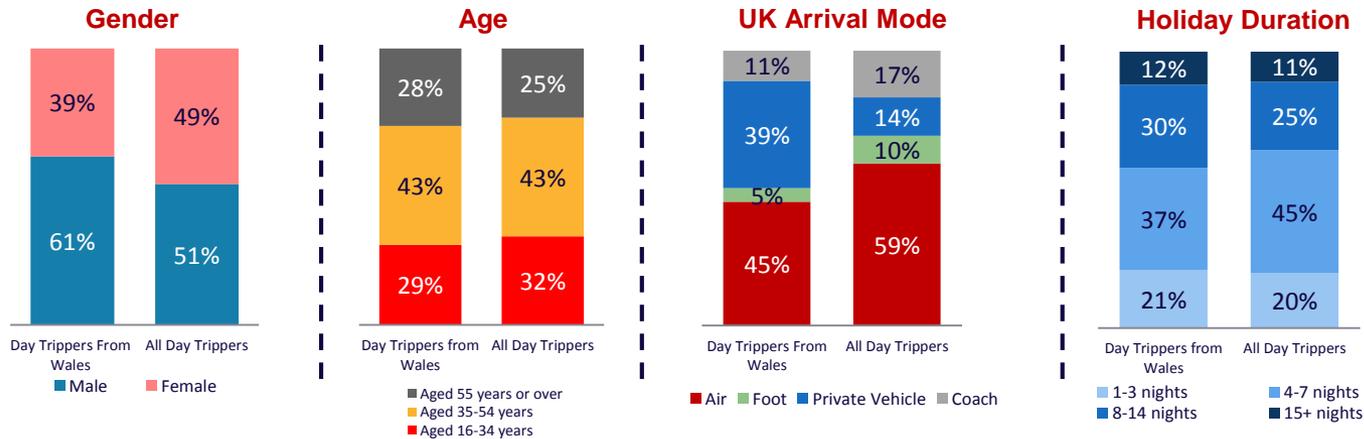
Summary of overseas holiday 'day trippers' staying in WALES

Caution: Small regional base size (136 respondents)

Overseas visitors who take day trips from places in Wales are more likely than overseas day trippers as whole to be male, arriving by private vehicle, staying longer periods (8-14 nights) and arranging their trip independently.

Source: IPS 2016

WALES
(115k
day trippers)



Day trip market size & profile

*NB. This data is from the data tables and included in the commentary as useful context

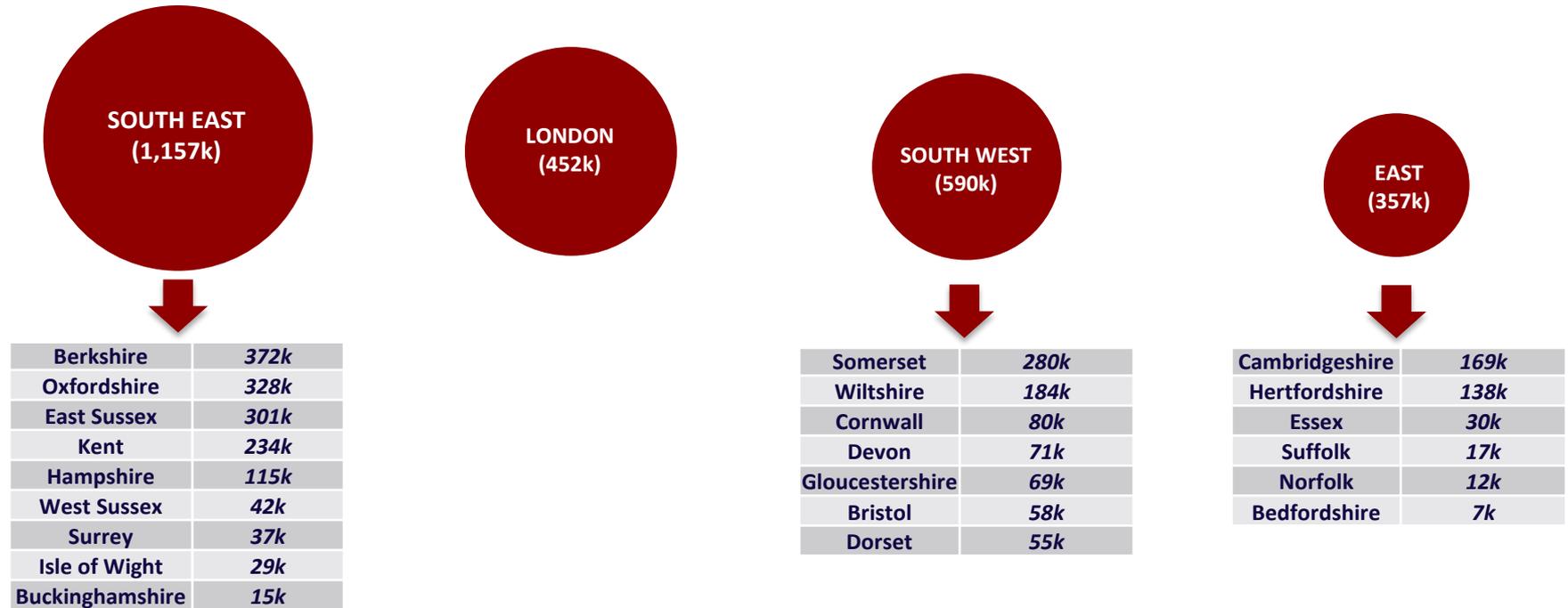


What are the day trip destinations among those staying in each region?

Data taken from 2016 International Passenger Survey (IPS)

Number of 'day trippers' VISITING regions and counties in England. By top four regions visited

Source: IPS 2016



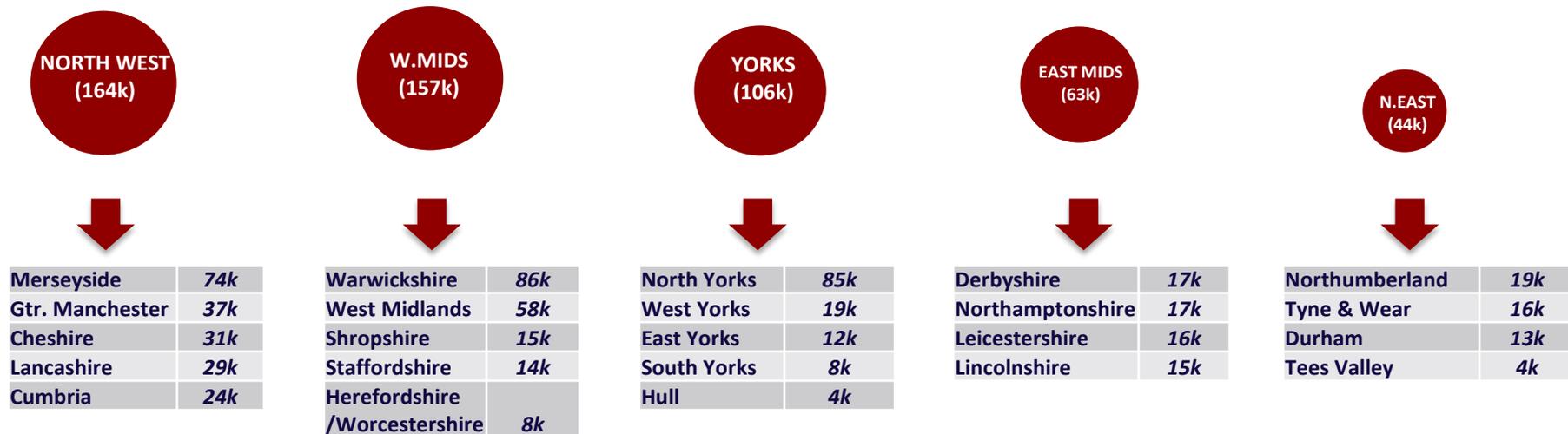
The above chart illustrates the regions and counties where overseas holiday visitors take day visits to when they visit the UK. London is the single most popular destination for day trippers, with 452k in 2016.

The South East is the most popular region, attracting 1,157k day trippers, with Berkshire (372k), Oxfordshire (328k), East Sussex (301k) and Kent (234k) all attracting over 200k visitors.

The South West (590k visitors) and East of England (357k visitors) also attract notable volumes of overseas day trippers, with Somerset (280k), Wiltshire (184k), Cambridgeshire (169k) and Hertfordshire (138k) all attracting over 100k day trippers.

Number of 'day trippers' VISITING regions and counties in England. By bottom five regions visited

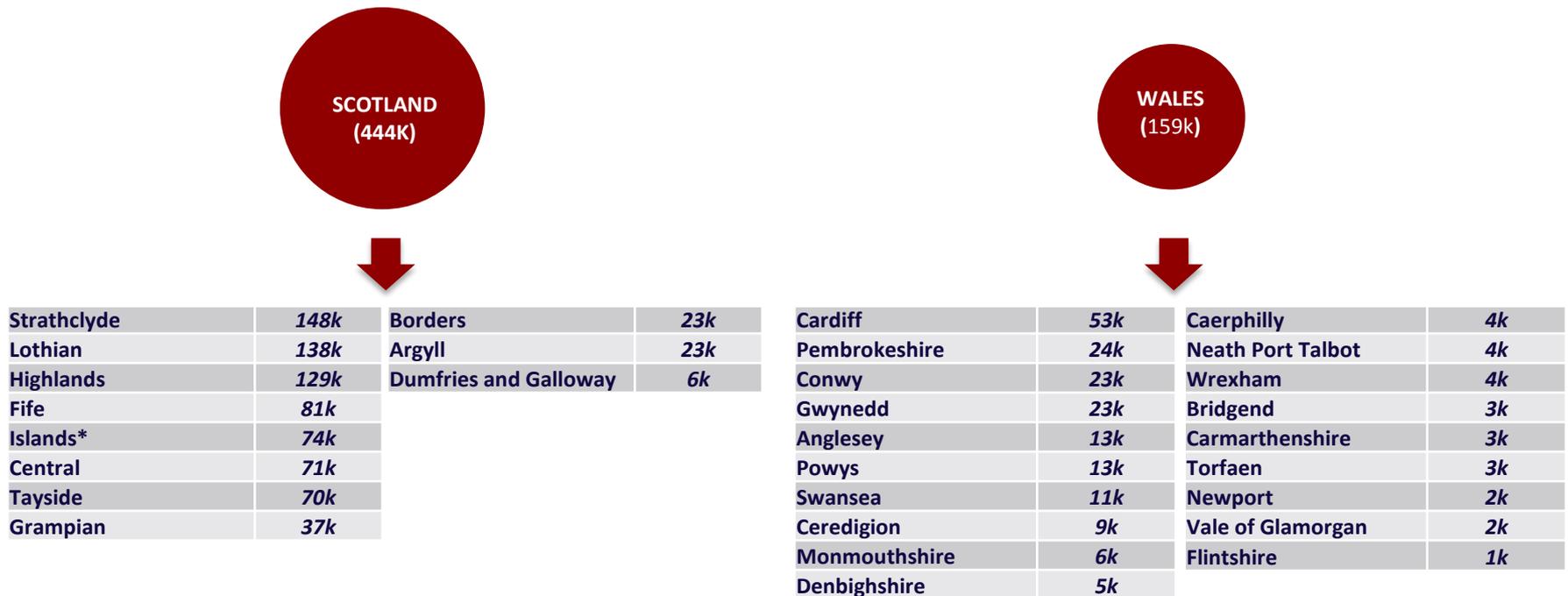
Source: IPS 2016



The North West attracts 164k day trippers - Merseyside (74k) and Greater Manchester (37k) are the most visited. Day trippers to the West Midlands (157k) are most likely to be visiting Warwickshire (86k); visitors to Yorkshire (106k) are most likely to be visiting North Yorkshire (85k).

Number of 'day trippers' VISITING regions and counties in Scotland/Wales.

Source: IPS 2016



Lothian (138k), Highlands (129k) and Strathclyde/ Loch Lomond (124k) are the top 3 regions in Scotland most likely to be visited by day trippers. Wales attracts 159k visitors, with Cardiff (53k) attracting the most day trippers.

*Islands combines Orkney, Shetland Islands, Western Isles and Islands Authorities

Number of 'day trippers' VISITING regions and cities/towns in England. By top four regions visited

Source: IPS 2016



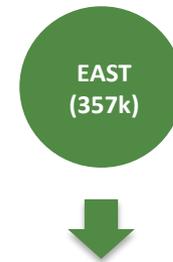
SOUTH EAST
(1,157k)



LONDON
(452k)



SOUTH WEST
(590k)



EAST
(357k)

Windsor	360k
Oxford	285k
Brighton/Hove	221k
Canterbury	146k
Watford	105k
Hastings	56k
Portsmouth / Southsea	46k
Dover	43k
Winchester	32k
Bicester	31k
Eastbourne	29k
Maidstone	23k
Southampton	18k
Tunbridge Wells	14k
Rye	13k
Reading	13k
Sevenoaks	12k

Day trip destinations

Bath	253k
Salisbury	140k
Bristol	58k
Amesbury	57k
Exeter	23k
Avebury	23k
Plymouth	22k
Land's End / Sennen	20k
Brixham / Paignton / Torbay / Torquay	18k
Bourton-on-the-Water	16k
St Ives	16k
Bournemouth	16k
Truro	15k
Penzance	14k
Cirencester	13k
Poole	13k
Weymouth	13k

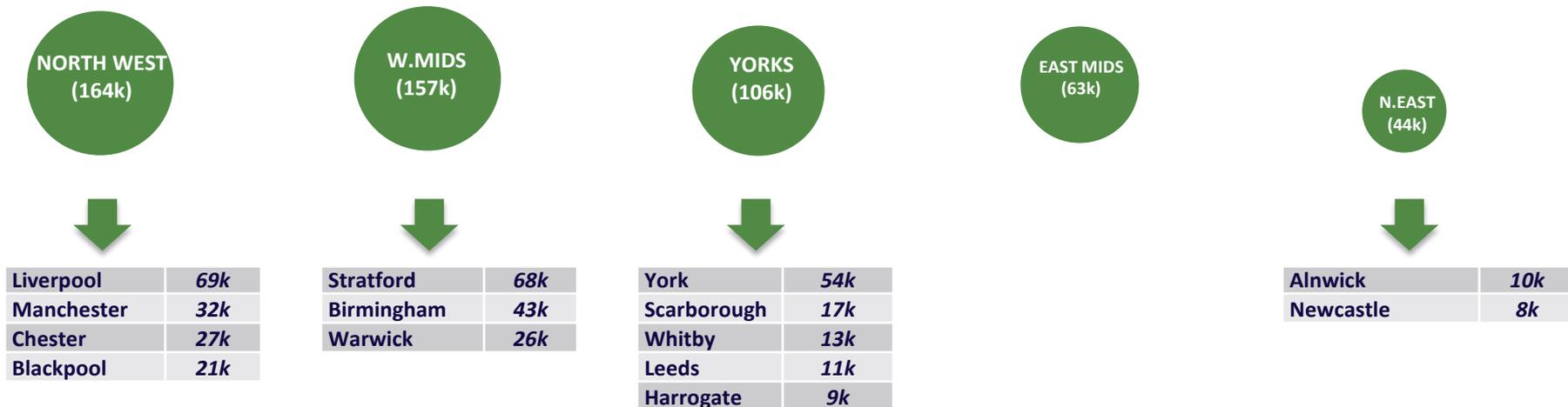
Cambridge	160k
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After London (452k day trippers), Windsor (360k), Oxford (285k), Bath (253k), Brighton (221k), Cambridge (160k), Canterbury (146k) and Salisbury (140k) are the other cities/towns recording international day trippers in excess of 100k.

N.B. Salisbury and Amesbury include day trippers visiting Stonehenge.

Number of 'day trippers' VISITING regions and cities/towns in England. By bottom five regions visited

Source: IPS 2016

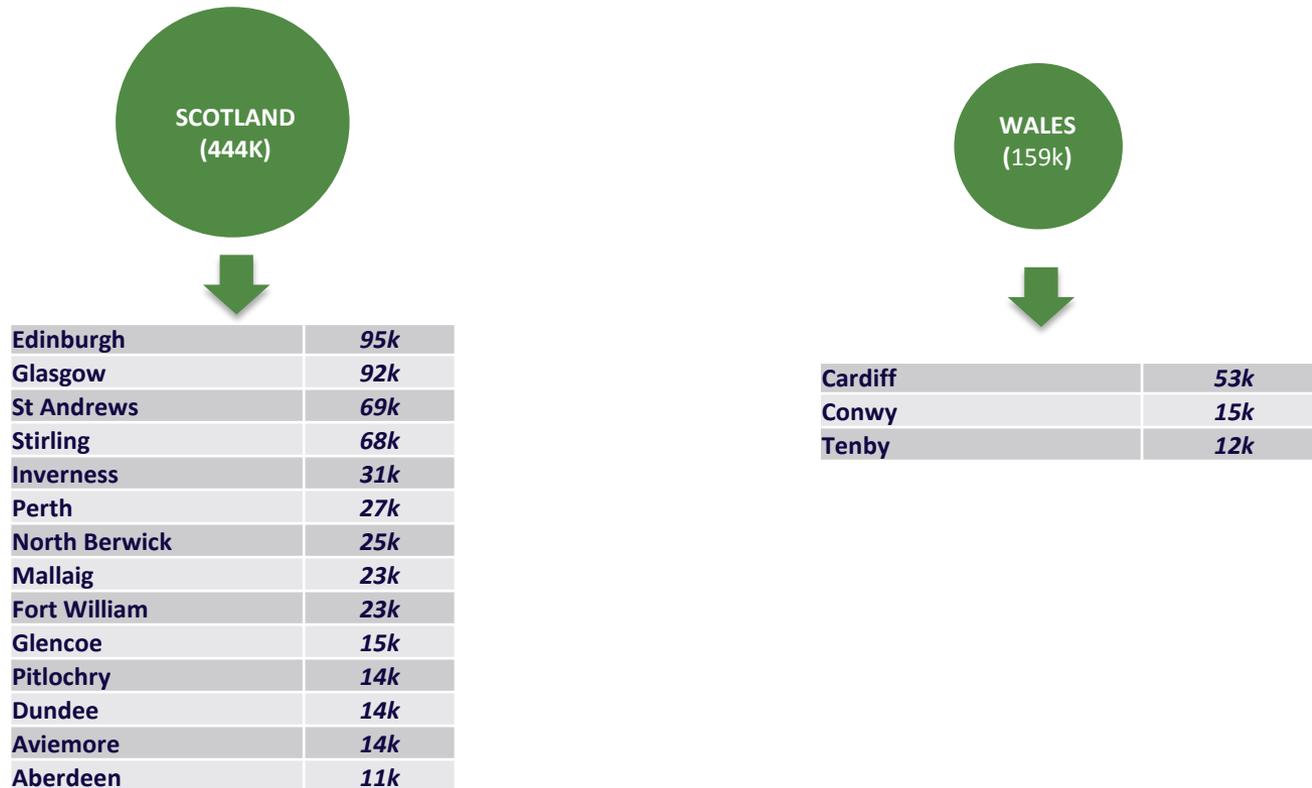


Liverpool attracts the highest number of international day trippers in the North West (69k), Stratford in the West Midlands (68k), York in Yorkshire (54k) and Alnwick in the North East (10k).

NB: Base sizes were too small to feature cities/towns in the East Midlands

Number of 'day trippers' VISITING regions and cities/towns in Scotland/Wales.

Source: IPS 2016



Edinburgh (95k) and Glasgow (92k) are the most popular cities for day trippers in Scotland. In Wales, Cardiff (53k) attracts the most day trippers.

Which regions are 'day trippers' who visit each CITY / TOWN staying in overnight? Top Destinations

Source: IPS 2016 *Signs indicate where a figure is less than 1%

All Day Trippers (000s)	London	South East	South West	North West	East	West Midlands	Yorkshire	East Midlands	North East	Scotland	Wales	Other UK
London	452	--	289 64%	49% 11%	9 2%	74 16%	17 4%	1 *%	4 1%	1 *%	-	2 <1%
Windsor	360	302 84%	36 10%	11 3%	-	4 1%	-	-	-	-	12 3%	2 1%
Oxford	285	188 66%	37 13%	26 9%	1 *%	20 7%	9 3%	1 *%	-	-	1 <1%	2 1%
Bath	253	139 55%	2 1%	73 29%	25 10%	3 1%	-	-	-	-	9 4%	-
Brighton	221	115 52%	91 41%	13 6%	-	4 2%	-	-	-	-	-	-
Cambridge	160	115 72%	10 6%	1 *%	-	30 19%	2 1%	3 2%	-	-	2 1%	-
Canterbury	146	55 38%	88 60%	3 2%	-	-	-	-	-	-	-	-
Salisbury	140	64 46%	36 26%	35 25%	1 *%	1 1%	-	-	-	-	1 1%	1 1%
Watford	105	101 96%	1 1%	-	-	-	-	-	-	-	-	2 2%
Edinburgh	95	17 17%	1 1%	-	1 *1%	-	-	-	1 1%	74 78%	-	-
Glasgow	92	4 4%	1 1%	-	-	-	-	-	-	87 94%	-	-
St Andrews	69	-	-	-	-	-	-	-	-	69 100%	-	-
Liverpool	69	11 16%	-	1 2%	42 61%	1 2%	3 4%	1 2%	-	68 100%	-	-
Stirling	68	-	-	-	-	-	-	-	-	68 100%	-	-
Stratford	68	29 42%	8 12%	12 18%	-	1 2%	18 26%	-	-	-	-	-
Bristol	58	13 23%	-	37 64%	-	-	-	-	-	8 14%	-	-
Amesbury	57	36 64%	19 33%	3 5%	-	-	-	-	-	-	-	-
Hastings	56	9 16%	47 84%	-	-	-	-	-	-	-	-	-
York	54	8 15%	-	-	15 27%	2 3%	-	18 33%	2 3%	6 12%	2 3%	1 *%

The above chart illustrates, for each city / town with over 50k 'day trippers', how many and what proportion of these day trippers originate from (are staying overnight in) each region. For example, of the 452k day trippers to London, 289k (64%) were staying overnight in the South East when they made this day trip.

N.B. Visitors were not asked directly which destinations they visited from each individual region in which they stayed. Therefore, we have based the above proportions upon those who only stayed in a single region – around 80% of those taking day trips - (therefore we can assume that each destination visited had this region as a source) and extrapolated the 'day tripper' volume figures accordingly.

Which regions are 'day trippers' who visit each CITY / TOWN staying in overnight? Other Destinations

Source: IPS 2016 *Signs indicate where a figure is less than 1%. Due to small base sizes, weighting and rounding some percentages do not to 100%

All Day Trippers (000s)	London	South East	South West	North West	East	West Midlands	Yorkshire	East Midlands	North East	Scotland	Wales	Other UK
Cardiff	53	16 31%	- -	24 44%	1 2%	- -	- -	- -	- -	- -	12 22%	- -
Portsmouth	46	3 6%	40 86%	1 3%	- -	- -	1 3%	- -	- -	- -	1 3%	- -
Dover	43	21 48%	14 33%	6 15%	- -	- -	- -	- -	- -	- -	1 3%	- -
Birmingham	43	11 26%	4 10%	1 3%	1 3%	* 1%	22 51%	- -	1 3%	- -	1 3%	1 3%
Winchester	32	7 23%	7 23%	17 53%	- -	- -	- -	- -	- -	- -	- -	- -
Manchester	32	9 28%	- -	- -	17 52%	- -	2 7%	2 7%	- -	1 3%	1 3%	- -
Inverness	31	- -	- -	- -	- -	- -	- -	- -	- -	31 100%	- -	- -
Bicester	31	30 96%	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Chester	27	2 6%	- -	- -	21 76%	- -	- -	- -	- -	- -	3 11%	- -
Perth	27	- -	- -	- -	- -	- -	- -	- -	- -	27 100%	- -	- -
Warwick	26	8 30%	5 20%	1 5%	- -	- -	10 40%	- -	- -	- -	- -	- -
N Berwick	25	- -	- -	- -	- -	- -	- -	- -	- -	25 100%	- -	- -
Maidstone	23	- 59%	- 31%	- -	- -	- -	- 9%	- -	- -	- -	- -	- -
Fort William	23	- -	- -	- -	- -	- -	- -	- -	- -	23 100%	- -	- -
Exeter	23	2 8%	- -	21 92%	- -	- -	- -	- -	- -	- -	- -	- -
Plymouth	22	4 16%	- -	17 79%	- -	- -	- -	- -	- -	- -	1 5%	- -
Blackpool	21	- -	- -	- -	19 89%	- -	1 5%	1 5%	- -	- -	- -	- -
Torbay	18	- -	- -	17 92%	- -	- -	- -	- -	- -	- -	1 8%	- -
Southampton	18	4 24%	4 24%	8 47%	- -	- -	- -	- -	1 6%	- -	- -	- -
Scarborough	17	- -	- -	- -	2 13%	- -	13 75%	2 13%	- -	- -	- -	- -
Bournemouth	16	6 36%	6 36%	4 27%	- -	- -	- -	- -	- -	- -	- -	- -
Truro	15	- -	- -	15 100%	- -	- -	- -	- -	- -	- -	- -	- -
Conwy	15	- -	- -	- -	6 40%	- -	- -	- -	- -	- -	8 50%	1 *

Which regions are 'day trippers' who visit each CITY / TOWN staying in overnight? Other Destinations

Source: IPS 2016 *Signs indicate where a figure is less than 1%

All Day Trippers (000s)	London		South East		South West		North West		East		West Midlands		Yorkshire		East Midlands		North East		Scotland		Wales		Other UK	
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
Penzance	14	2	17%	12	83%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Pitlochry	14	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	14	100%	-	-	-	-
Tunbridge Wells	14	4	25%	12	83%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Dundee	14	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	14	100%	-	-	-	-
Aviemore	14	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	14	100%	-	-	-	-
Rye	13	-	-	13	100%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Poole	13	-	-	-	-	13	100%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Whitby	13	-	-	-	-	-	-	-	-	-	-	-	11	83%	-	-	2	17%	-	-	1	7%	-	-
Reading	13	11	83%	-	-	1	8%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Weymouth	13	-	-	-	-	12	91%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Sevenoaks	12	5	42%	8	67%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Tenby	12	-	-	-	-	1	10%	-	-	-	-	-	-	-	-	-	-	-	-	-	11	90%	-	-
Aberdeen	11	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	11	100%	-	-	-	-
Leeds	11	1	13%	1	13%	-	-	3	25%	-	-	-	6	50%	-	-	-	-	-	-	-	-	-	
Alnwick	10	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	7	71%	3	29%	-	-	-	-
Ayr	10	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	10	100%	-	-	-	-
Harrogate	9	-	-	-	-	-	-	-	-	-	-	-	9	100%	-	-	-	-	-	-	-	-	-	-
Swansea	9	-	-	-	-	2	25%	-	-	-	-	-	-	-	-	-	-	-	-	-	7	75%	-	-
Newcastle	8	-	-	-	-	-	-	-	-	-	-	-	1	12%	-	-	4	50%	3	38%	-	-	-	-

Which regions are 'day trippers' who visit each COUNTY staying in overnight? South East / South West counties

Source: IPS 2016 *Signs indicate where a figure is less than 1%

All Day Trippers (000s)	London		South East		South West		North West		East		West Midlands		Yorkshire		East Midlands		North East		Scotland		Wales		Other UK		
	Volume	%	Volume	%	Volume	%	Volume	%	Volume	%	Volume	%	Volume	%	Volume	%	Volume	%	Volume	%	Volume	%	Volume	%	
S. EAST																									
Berkshire	372	312 84%	37	10%	11	3%	-	-	4	1%	4	1%	-	-	-	-	-	-	-	-	-	1	*%	-	-
Oxfordshire	328	223 68%	43	13%	30	9%	1	*%	20	6%	7	2%	-	-	3	1%	-	-	1	*%	-	-	3	1%	
East Sussex	301	135 45%	144	48%	18	6%	-	-	3	1%	-	-	-	-	-	-	-	-	-	-	1	*%	-	-	
Kent	234	98 42%	124	53%	9	4%	-	-	-	-	2	1%	-	-	2	1%	-	-	-	-	1	1%	-	-	
Hampshire	115	35 30%	52	45%	23	22%	-	-	-	-	-	-	1	1%	-	-	1	1%	-	-	1	1%	-	-	
West Sussex	42	16 39%	24	56%	3	6%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Surrey	37	20 55%	16	42%	1	3%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	3%	
Isle of Wight	29	-	13	44%	16	56%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Bucks	15	5 30%	5	30%	3	20%	-	-	2	10%	-	-	-	-	2	10%	-	-	-	-	-	-	-	-	
S. WEST																									
Somerset	280	143 51%	28	10%	95	34%	3	1%	1	*%	-	-	-	-	-	-	-	-	-	-	9	3%	-	-	
Wiltshire	184	83 45%	44	24%	52	28%	-	-	2	1%	-	-	-	-	-	-	-	-	-	-	1	1%	1	1%	
Cornwall	80	6 7%	2	2%	63	79%	-	-	-	-	-	-	-	-	-	-	-	-	8	10%	2	2%	-	-	
Devon	71	6 9%	-	-	60	85%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5	6%	-	-	
Gloucs	69	11 16%	11	16%	39	56%	-	-	-	-	5	7%	-	-	-	-	1	2%	-	-	2	<1%	-	-	
Bristol	58	13 23%	-	-	37	64%	-	-	-	-	*	*%	-	-	-	-	-	-	-	-	8	14%	-	-	
Dorset	55	8 15%	6	10%	40	73%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

The above chart illustrates, for each county visited on a day trip, how many and what proportion of these day trippers originate from (are staying overnight in) each region.

For example, of the 372k day trippers to Berkshire, 312k (84%) were staying overnight in London when they made this day trip.

See the note on Slide 44 regarding extrapolation of volume figures using data based only on those staying overnight in a single region.

Which regions are 'day trippers' who visit each COUNTY staying in overnight? East / North West / West Midlands counties

Source: IPS 2016 *Signs indicate where a figure is less than 1%

All Day Trippers (000s)	London	South East	South West	North West	East	West Midlands	Yorkshire	East Midlands	North East	Scotland	Wales	Other UK
EAST												
Cambs	169	120 71%	8 5%	- -	- -	32 19%	2 1%	- -	5 3%	- -	2 1%	- -
Herts	138	128 93%	1 1%	3 2%	- -	6 4%	- -	- -	- -	- -	- -	- -
Essex	30	15 50%	8 27%	2 5%	- -	5 18%	- -	- -	- -	- -	- -	- -
Suffolk	17	6 36%	- -	2 9%	2 9%	6 36%	- -	- -	2 9%	- -	- -	- -
Norfolk	12	7 57%	- -	- -	- -	5 43%	- -	- -	- -	- -	- -	- -
Bedfordshire	7	5 67%	1 17%	1 17%	- -	- -	- -	- -	- -	- -	- -	- -
N. WEST												
Merseyside	74	10 14%	- -	1 2%	47 63%	1 2%	3 4%	3 4%	1 2%	- -	7 9%	- -
Manchester	37	9 24%	- -	- -	21 58%	- -	2 6%	2 6%	- -	1 3%	1 3%	- -
Cheshire	31	2 5%	- -	- -	25 80%	- -	2 5%	- -	- -	- -	5 15%	- -
Lancashire	29	- -	- -	- -	26 88%	- -	- -	1 4%	1 4%	* *	- -	- -
Cumbria	24	2 8%	- -	- -	17 69%	- -	2 8%	- -	2 8%	2 8%	- -	- -
W. MIDS												
Warks	86	35 41%	14 16%	15 17%	- -	1 1%	22 25%	- -	- -	- -	- -	- -
West Mids	58	13 22%	6 10%	1 2%	1 2%	1 2%	32 55%	- -	3 6%	- -	1 2%	- -
Shropshire	15	- -	- -	- -	2 13%	- -	7 44%	- -	- -	- -	5 33%	- -
Staffordshire	14	- -	1 9%	1 9%	- -	- -	10 73%	- -	1 9%	- -	- -	- -
Herefordshire / Worcs	8	3 40%	- -	3 40%	- -	- -	2 20%	- -	- -	- -	- -	- -

The above chart illustrates, for each county visited on a day trip, how many and what proportion of these day trippers originate from (are staying overnight in) each region.

For example, of the 169k day trippers to Cambridgeshire, 120k (71%) were staying overnight in London when they made this day trip.

See the note on Slide 44 regarding extrapolation of volume figures using data based only on those staying overnight in a single region.

Which regions are 'day trippers' who visit each COUNTY staying in overnight? Yorkshire / East Midlands / North East counties

Source: IPS 2016 *Signs indicate where a figure is less than 1%

All Day Trippers (000s)	London	South East	South West	North West	East	West Midlands	Yorkshire	East Midlands	North East	Scotland	Wales	Other UK
YORKSHIRE												
N.Yorkshire	85	9 10%	- -	- -	17 20%	2 2%	- -	42 49%	3 4%	9 10%	2 2%	- -
W.Yorkshire	19	2 8%	2 8%	- -	6 33%	- -	- -	7 38%	2 8%	- -	- -	- -
E.Yorkshire	12	- -	1 11%	- -	1 11%	- -	- -	9 78%	- -	- -	- -	- -
S.Yorkshire	8	- -	- -	- -	2 25%	- -	- -	2 25%	2 25%	- -	2 25%	- -
Hull	4	- -	- -	- -	- -	- -	- -	3 75%	1 25%	- -	- -	- -
E. MIDS												
Derbyshire	17	- -	- -	3 15%	3 15%	- -	1 8%	5 31%	3 15%	- -	- -	1 1%
Northants	17	10 56%	- -	- -	- -	- -	1 6%	- -	6 38%	- -	- -	- -
Leics	16	8 50%	1 8%	- -	- -	- -	1 8%	3 17%	- -	- -	- -	- -
Lincs	15	2 10%	- -	- -	- -	2 10%	3 20%	2 10%	6 40%	- -	- -	2 10%
N. EAST												
orthumberland	19	- -	- -	- -	- -	- -	- -	- -	7 38%	12 62%	- -	- -
Tyne Wear	16	2 11%	- -	- -	- -	- -	- -	- -	11 67%	4 22%	- -	- -
Durham	13	- -	- -	2 14%	- -	- -	- -	- -	11 86%	- -	- -	- -
Tees Valley	4	- -	- -	- -	- -	- -	- -	- -	4 100%	- -	- -	- -

The above chart illustrates, for each county visited on a day trip, how many and what proportion of these day trippers originate from (are staying overnight in) each region.

For example, of the 85k day trippers to North Yorkshire, 9k (10%) were staying overnight in London when they made this day trip.

See the note on Slide 44 regarding extrapolation of volume figures using data based only on those staying overnight in a single region.

Which regions are 'day trippers' who visit each COUNTY staying in overnight? Scotland

Source: IPS 2016 *Signs indicate where a figure is less than 1%

All Day Trippers (000s)	London		South East		South West		North West		East		West Midlands		Yorkshire		East Midlands		North East		Scotland		Wales		Other UK		
SCOTLAND																									
Strathclyde	148	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	148	100%	-	-	-	-
Lothian	138	15	11%	1	1%	-	-	*	*%	-	-	-	-	*	*%	-	-	1	1%	119	86%	-	-	-	-
Highlands	129	-	-	1	1%	-	-	*	*%	-	-	-	-	-	-	-	-	-	-	126	98%	*	*%	-	-
Fife	81	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	81	100%	-	-	-	-
Islands	74	-	-	-	-	-	-	1	1%	-	-	-	-	-	-	-	-	-	-	73	99%	-	-	-	-
Central	71	-	-	1	2%	1	2%	-	-	-	-	-	-	-	-	-	-	-	-	68	96%	-	-	-	-
Tayside	70	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	68	97%	-	-	2	3%
Grampian	37	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	35	94%	-	-	2	6%
Borders	23	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	23	100%	-	-	-	-
Argyll	23	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	19	100%	-	-	-	-
Dumfries and Galloway	6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	6	100%	-	-	-	-

The above chart illustrates, for each county visited on a day trip, how many and what proportion of these day trippers originate from (are staying overnight in) each region.

For example, of the 138k day trippers to Lothian, 15k (11%) were staying overnight in London when they made this day trip.

See the note on Slide 44 regarding extrapolation of volume figures using data based only on those staying overnight in a single region.

Which regions are 'day trippers' who visit each COUNTY staying in overnight? Wales

Source: IPS 2016 *Signs indicate where a figure is less than 1%

All Day Trippers (000s)	London	South East	South West	North West	East	West Midlands	Yorkshire	East Midlands	North East	Scotland	Wales	Other UK
WALES												
Cardiff	53	16 31%	- -	24 44%	1 2%	- -	- -	- -	- -	- -	12 22%	- -
Pembs	24	- -	- -	- -	- -	- -	- -	- -	- -	2 1%	24 100%	- -
Conwy	23	- -	- -	- -	9 35%	- -	- -	- -	- -	- -	- 59%	* *
Gwynedd	23	- -	- -	- -	3 13%	- -	- -	- -	- -	- -	20 87%	- -
Anglesey	13	- -	- -	- -	- -	- -	- -	- -	- -	- -	13 100%	- -
Powys	13k	- -	- -	- -	- -	4 29%	- -	- -	- -	- -	7 57%	- -
Swansea	11k	- -	- -	4 40%	- -	- -	- -	- -	- -	- -	7 60%	- -
Ceredigion	9k	- -	- -	- -	- -	2 20%	- -	- -	- -	- -	7 80%	- -

The above chart illustrates, for each county visited on a day trip, how many and what proportion of these day trippers originate from (are staying overnight in) each region.

For example, of the 53k day trippers to Cardiff, 16k (31%) were staying overnight in London when they made this day trip.

See the note on Slide 44 regarding extrapolation of volume figures using data based only on those staying overnight in a single region.

Which regions are ‘day trippers’ who visit each COUNTY staying in overnight? Wales

Source: IPS 2016 *Signs indicate where a figure is less than 1%

All Day Trippers (000s)	London		South East		South West		North West		East		West Midlands		Yorkshire		East Midlands		North East		Scotland		Wales		Other UK		
Monmouthshire	6k	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	6	100%	-	-
Denbighshire	5k	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5	100%	-	-
Caerphilly	4k	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4	100%	-	-
Neath Port Talbot	4k	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4	100%	-	-
Wrexham	4k	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4	100%	-	-
Bridgend	3k	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	3	100%	-	-
Carmarthenshire	3k	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	100%	-	-
Torfaen	3k	1	50%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	50%	-	-
Newport	2k	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	100%	-	-
Vale of Glamorgan	2k	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	100%	-	-
Flintshire	1k	-	-	-	-	-	-	1	100%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

The above chart illustrates, for each county visited on a day trip, how many and what proportion of these day trippers originate from (are staying overnight in) each region.

For example, of the 3k day trippers to Torfaen, 50% were staying overnight in London when they made this day trip.

See the note on Slide 44 regarding extrapolation of volume figures using data based only on those staying overnight in a single region.

What is the extent of inter-regional travel for 'day trippers'?

Source: IPS 2016 *Signs indicate where a figure is less than 1%

All Day Trippers (000s)-	London		South East		South West		North West		East		West Midlands		Yorkshire		East Midlands		North East		Scotland		Wales		Other UK		
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	
London	452	NA	NA	289	64%	49	11%	9	2%	74	16%	17	4%	1	0%	4	1%	1	0%	-	-	7	1%	2	0%
South East	1,157	706	61%	312	27%	81	7%	3	0%	23	2%	12	1%	3	0%	3	0%	3	0%	1	0%	5	0%	5	0%
South West	590	236	40%	77	13%	236	40%	6	1%	2	0%	6	1%	-	-	-	-	2	0%	6	1%	17	3%	1	0%
North West	164	20	12%	-	-	2	1%	105	64%	2	1%	7	4%	7	4%	3	2%	2	1%	3	2%	12	7%	*	0%
East	357	278	78%	21	6%	7	2%	11	0%	39	11%	1	0%	-	-	7	2%	-	-	1	0%	-	-	1	0%
West Mids	157	46	29%	20	13%	16	10%	3	2%	3	2%	58	37%	-	-	3	2%	-	-	-	-	5	3%	-	-
Yorkshire	106	12	11%	3	3%	-	-	24	23%	2	2%	-	-	49	46%	6	6%	8	8%	2	2%	*	0%	*	0%
East Mids	63	20	32%	1	2%	3	4%	3	4%	1	2%	6	10%	9	14%	18	29%	-	-	-	-	3	4%	-	-
North East	44	2	4%	-	-	2	4%	-	-	-	-	-	-	2	4%	-	-	22	50%	17	38%	-	-	-	-
Scotland	444	18	4%	4	1%	1	0%	-	-	-	-	-	-	-	-	-	-	1	0%	414	93%	*	0%	-	-
Wales	159	24	15%	-	-	35	22%	14	9%	-	-	3	2%	-	-	-	-	-	-	-	-	82	52%	-	-

The above chart illustrates, for each region visited on a day trip, how many and what proportion of these 'day trippers' originate from (are staying overnight in) either that same region – highlighted in red – or from another region.

For example, of the 1,157k day trippers to the South East, 706k (61%) were staying in London, and 27% (312) were staying in a different destination in the South East.

Scotland generates the highest proportion of intra-regional travel, 93% (414k) of its day trippers made up of people staying overnight within the region. The East of England generates the lowest proportion of intra-regional trips, 11% if its day trippers staying overnight in the region, the majority (78%) staying in London.

See the note on Slide 44 regarding extrapolation of volume figures using data based only on those staying overnight in a single region.



What is the profile of those taking day trips to each destination?

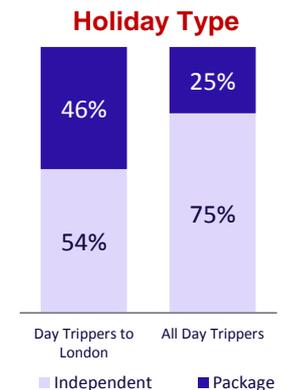
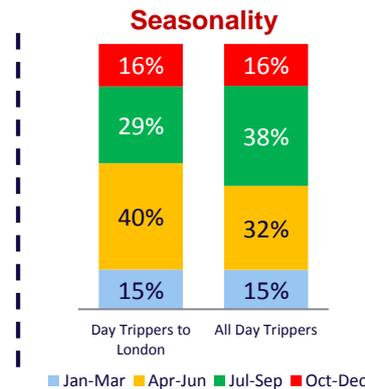
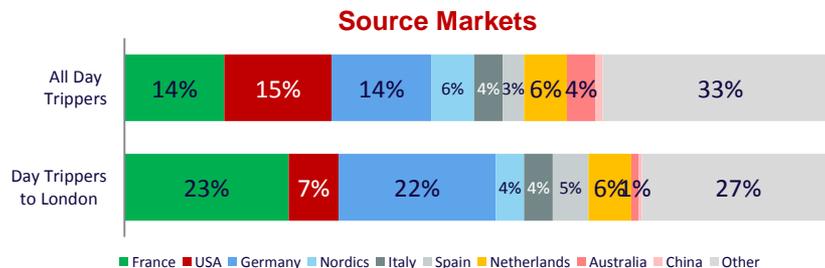
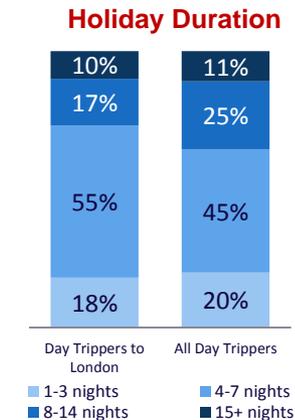
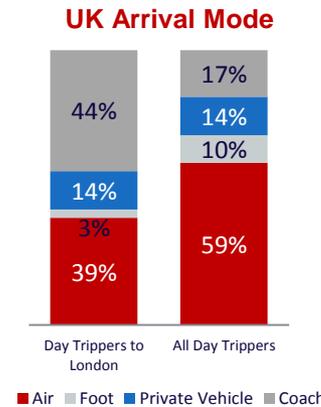
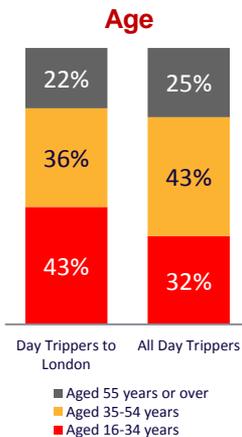
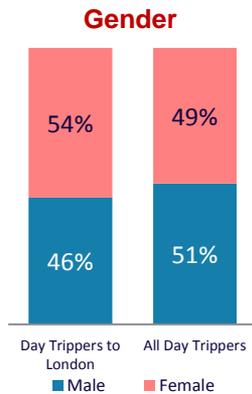
Data taken from 2016 International Passenger Survey (IPS)

Summary of overseas holiday 'day trippers' to LONDON

Overseas visitors who take day trips to London are significantly more likely than overseas day trippers as a whole to be younger (aged 16-34 years), arriving in the UK by coach, on a packaged trip, staying less than 7 nights, from France or Germany and be visiting in the January to June period.

Source: IPS 2016

LONDON
(452k
day trippers)



Summary of overseas holiday 'day trippers' to WINDSOR / BERKSHIRE

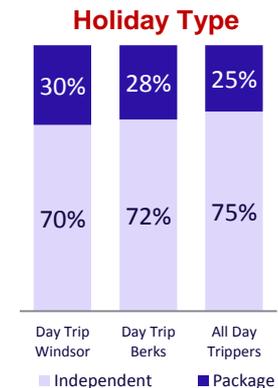
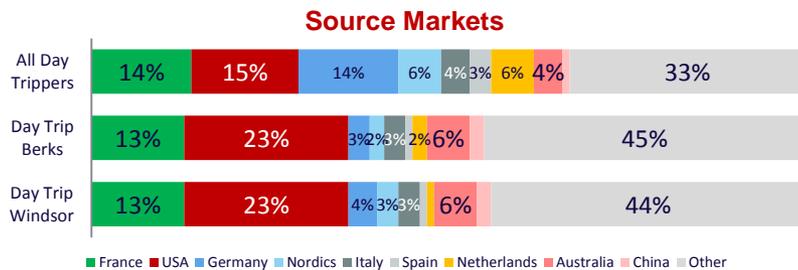
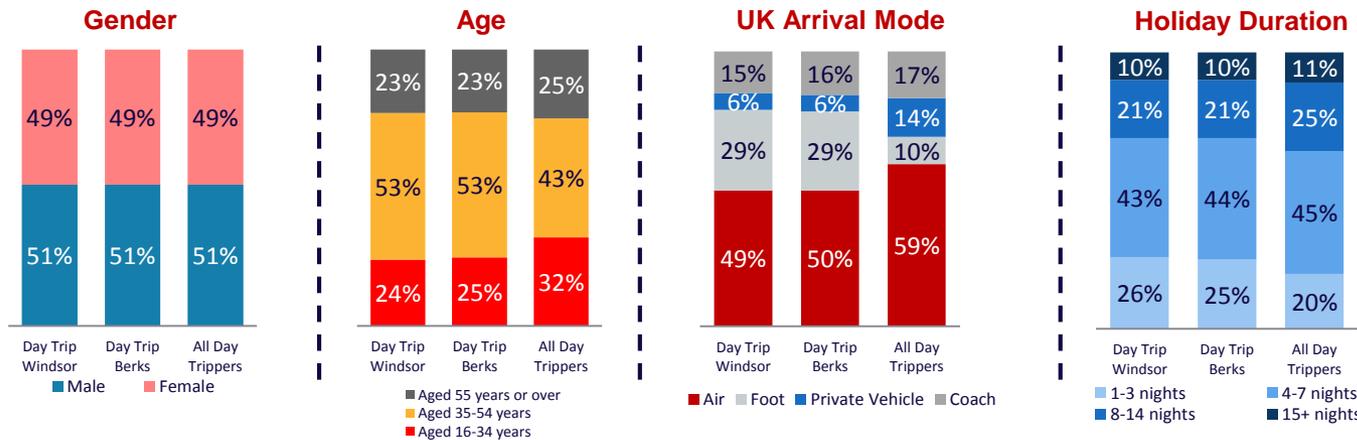
Overseas day trippers to Windsor make up 97% of all overseas day trippers to Berkshire.

Overseas visitors who take day trips to Windsor / Berkshire are significantly more likely than overseas day trippers as a whole to be middle aged (35-54 yrs), arriving in the UK on foot (mainly rail) and be visiting from the USA or other non-core origin markets.

Source: IPS 2016

BERKSHIRE
(372k day trippers)

Windsor:
360k day trippers



Summary of overseas holiday 'day trippers' to OXFORD / OXFORDSHIRE

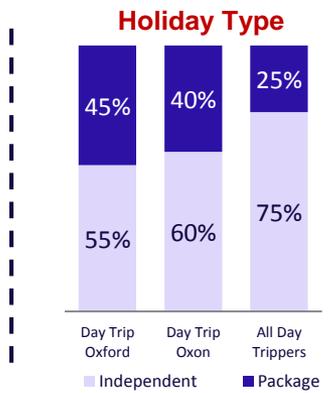
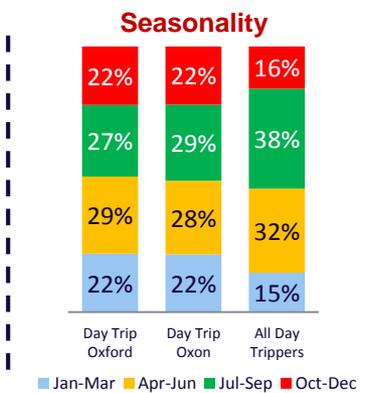
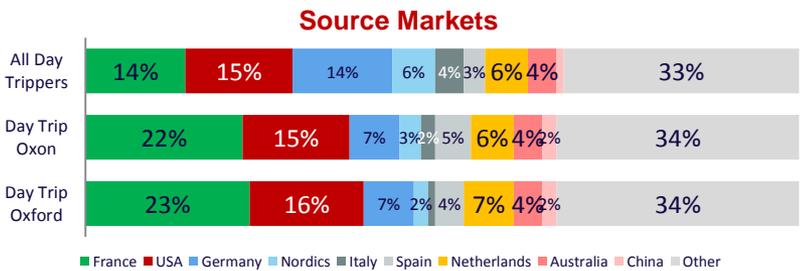
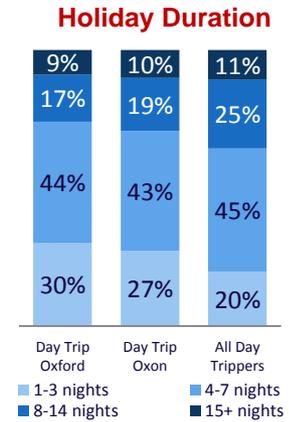
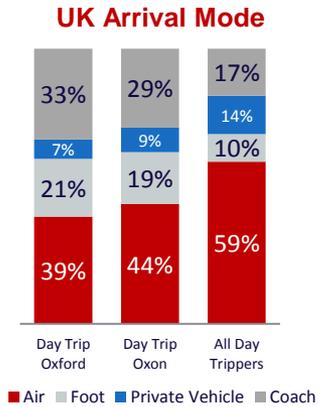
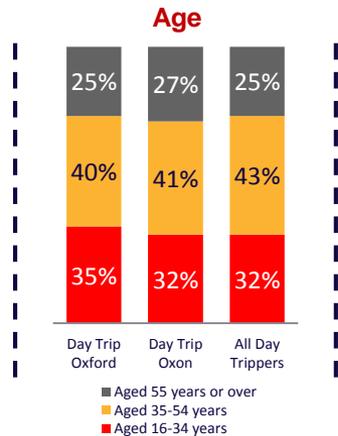
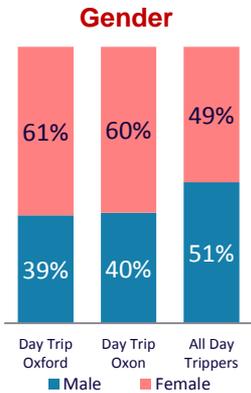
Overseas day trippers to Oxford make up 87% of all overseas day trippers to Oxfordshire.

Overseas visitors who take day trips to Oxford / Oxfordshire are significantly more likely than overseas day trippers as a whole to be female, arriving in the UK on a coach or on foot (mainly rail), on a short break of 1-3 nights, from France, visiting in the off-peak October to March period and be on a packaged trip.

Source: IPS 2016

OXON
(328k day trippers)

Oxford:
285k day trippers



Summary of overseas holiday 'day trippers' to BRIGHTON / E.SUSSEX

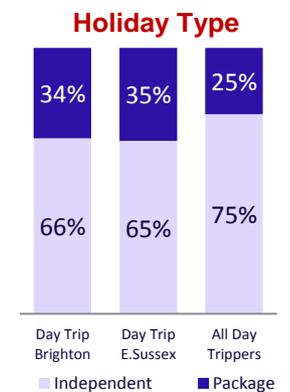
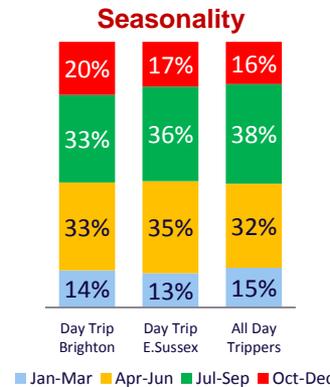
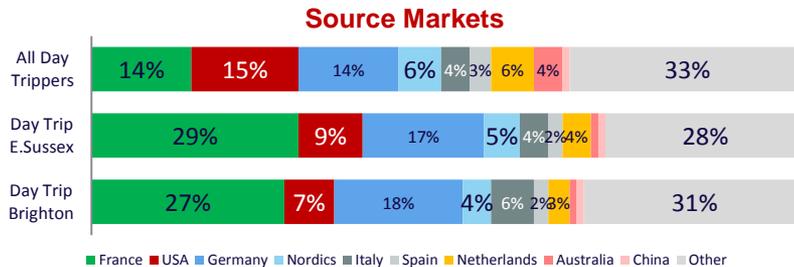
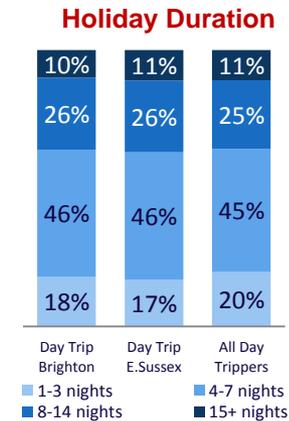
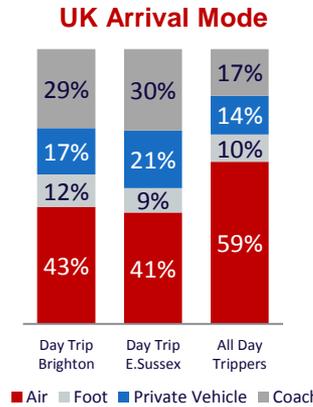
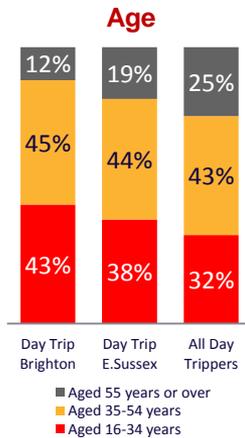
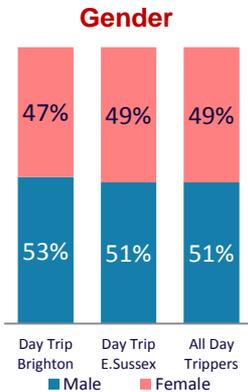
Overseas day trippers to Brighton make up 73% of all overseas day trippers to East Sussex. 19% (57k) of East Sussex day trippers visit Hastings.

Overseas visitors who take day trips to Brighton / East Sussex are significantly more likely than overseas day trippers as a whole to be younger (aged under 35 yrs) to be arriving in the UK by coach, from France or on a packaged trip.

Source: IPS 2016

E.SUSSEX
(301k
day trippers)

Brighton:
221k day trippers



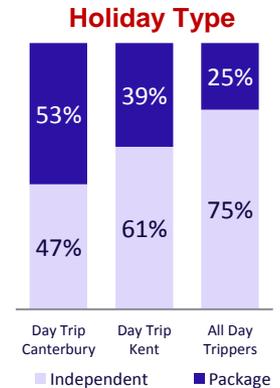
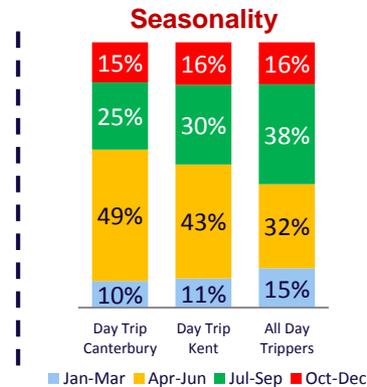
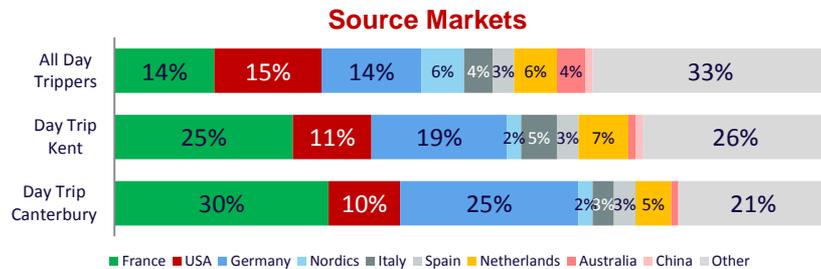
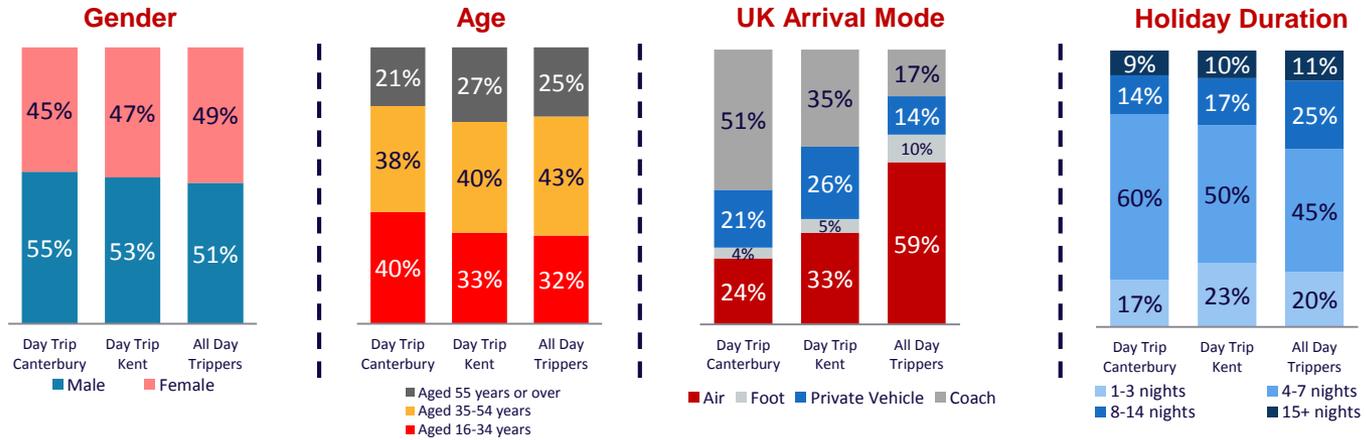
Summary of overseas holiday 'day trippers' to CANTERBURY / KENT

Overseas day trippers to Canterbury make up 62% of all overseas day trippers to Kent. 18% (42k) of Kent day trippers visit Dover. Overseas visitors who take day trips to Canterbury are more likely than overseas day trippers as a whole to be younger (aged under 35 yrs), be staying 1-7 nights, from France or Germany (especially Canterbury), visiting in Apr-Jun or be on a packaged trip. They are significantly more likely to arrive in the UK by coach (especially Canterbury).

Source: IPS 2016

KENT
(234k
day trippers)

Canterbury:
146k day trippers



Summary of overseas holiday 'day trippers' to BATH / SOMERSET

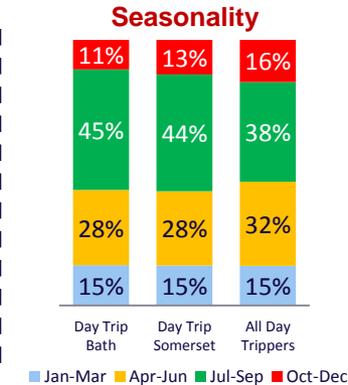
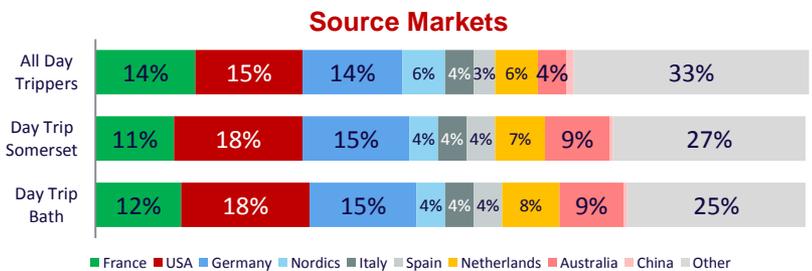
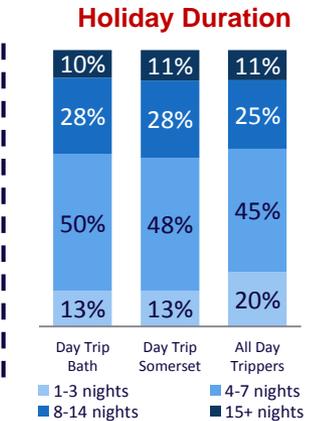
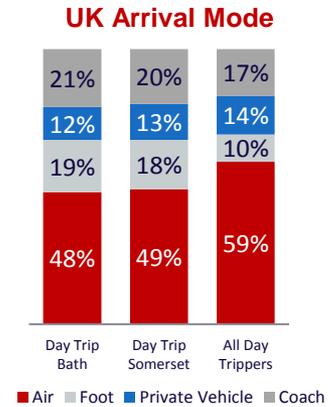
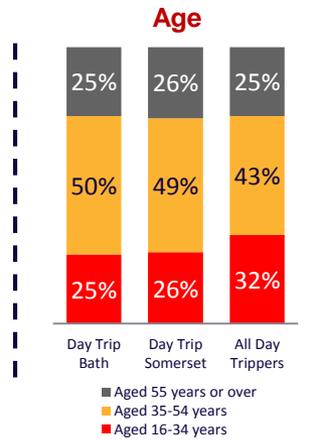
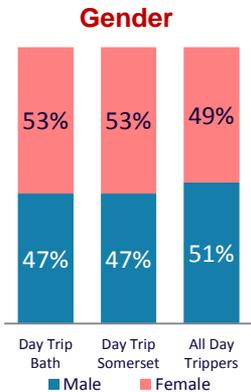
Overseas day trippers to Bath make up 90% of all overseas day trippers to Somerset.

Overseas visitors who take day trips to Bath / Somerset are significantly more likely than overseas day trippers as a whole to be aged 35-54, arriving in the UK on foot (mainly rail), from Australia, visiting during the peak July to September period and on a packaged trip.

Source: IPS 2016

SOMERSET
(280k day trippers)

Bath:
253k day trippers



Summary of overseas holiday 'day trippers' to SALISBURY / WILTSHIRE

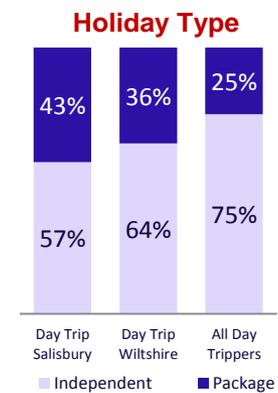
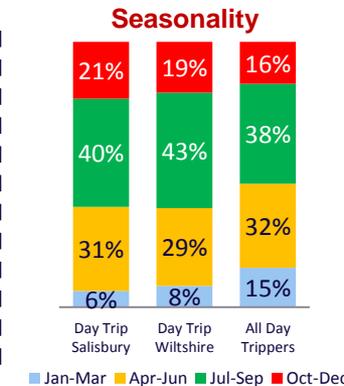
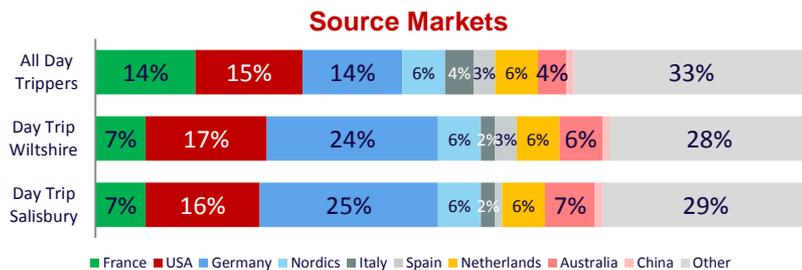
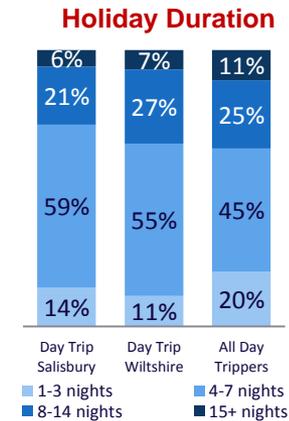
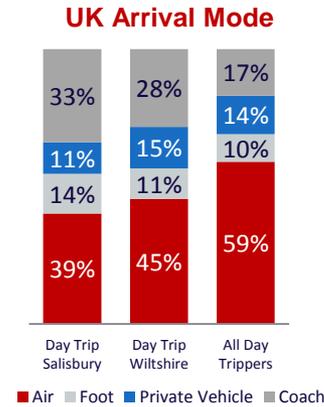
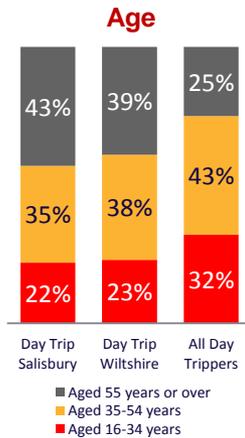
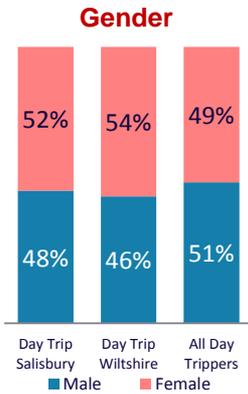
Overseas day trippers to Salisbury make up 76% of all overseas day trippers to Wiltshire. Visitors to Stonehenge are included within day trippers to Salisbury.

Overseas visitors who take day trips to Salisbury / Wiltshire are significantly more likely than overseas day trippers as a whole to be older (aged 55 or older), arriving in the UK by coach, staying in the UK for 4-7 nights, from Germany and on a package trip.

Source: IPS 2016

WILTSHIRE
(184k day trippers)

Salisbury:
140k day trippers



Summary of overseas holiday 'day trippers' to CAMBRIDGE / CAMBS

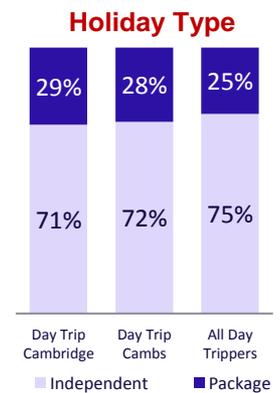
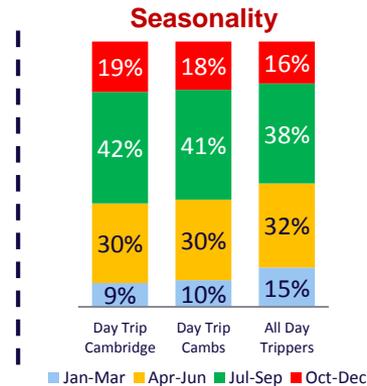
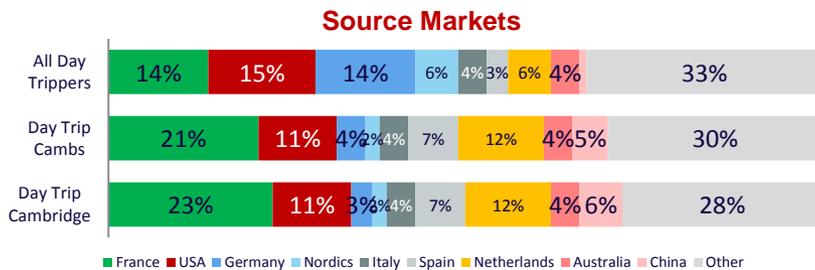
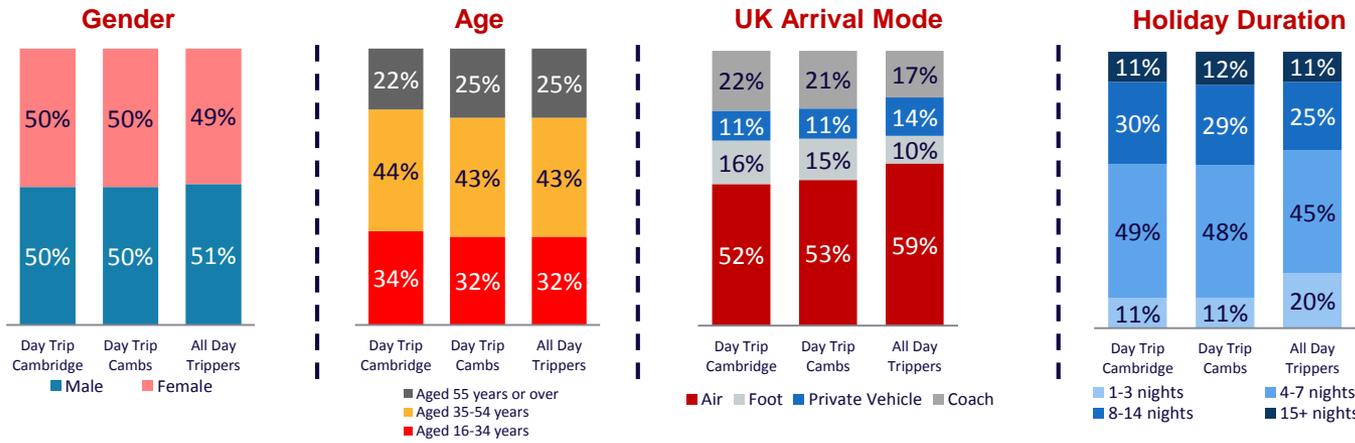
Overseas day trippers to Cambridge make up 95% of all overseas day trippers to Cambridgeshire.

Overseas visitors who take day trips to Cambridge / Cambridgeshire are more likely than overseas day trippers as a whole to be arriving in the UK on foot (mainly rail). They are significantly more likely to be from France, Netherlands or China.

Source: IPS 2016

CAMBS
(169k day trippers)

Cambridge:
160k day trippers



Summary of overseas holiday 'day trippers' to STRATFORD / WARKS

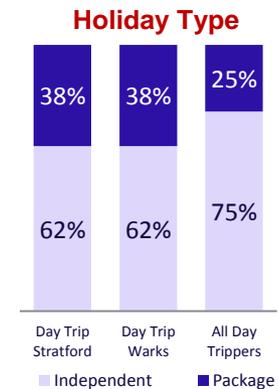
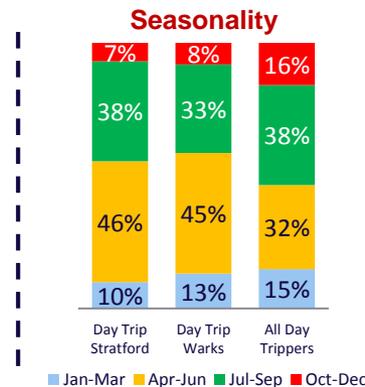
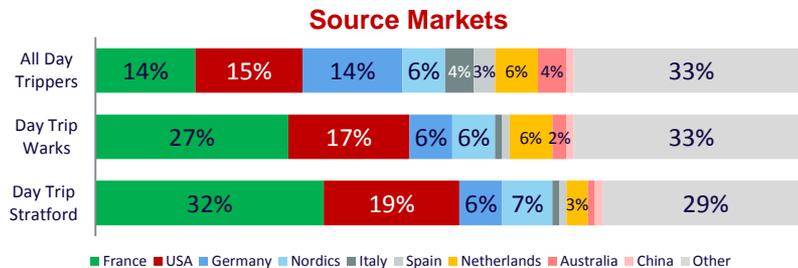
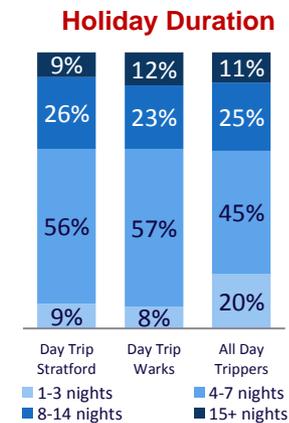
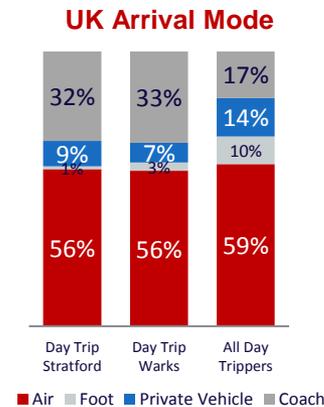
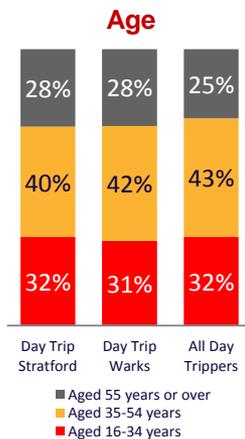
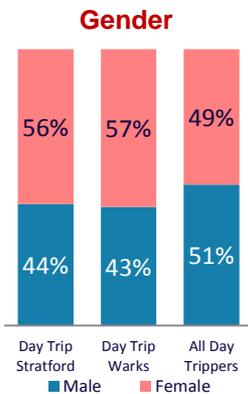
Overseas day trippers to Stratford-upon-Avon make up 79% of all overseas day trippers to Warwickshire.

Overseas visitors who take day trips to Stratford / Warwickshire are significantly more likely than overseas day trippers as a whole to be female, arriving in the UK by coach, staying in the UK for 4-7 nights, from France, visiting in the April to June period and on a packaged trip.

Source: IPS 2016

WARWICKS
(86k day trippers)

Stratford-on-Avon:
68k day trippers



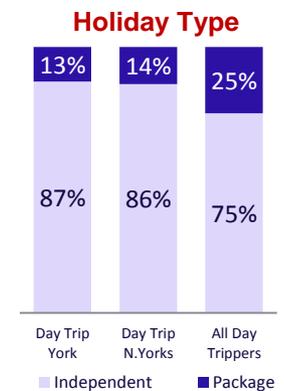
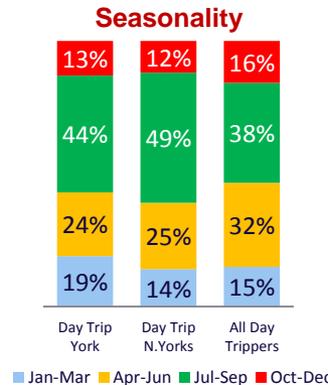
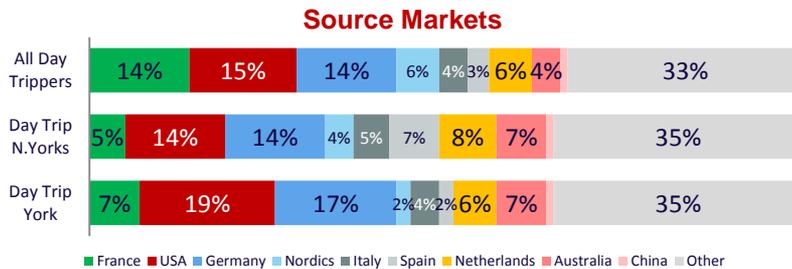
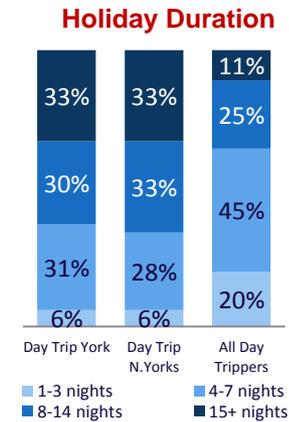
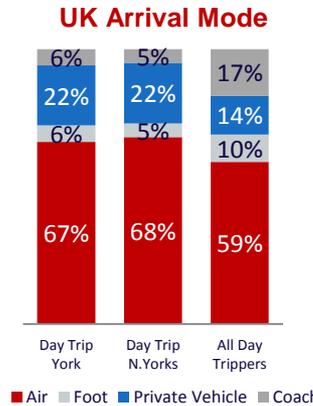
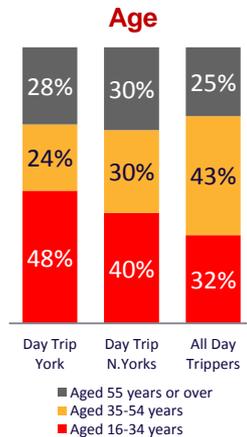
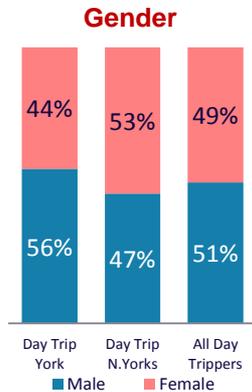
Summary of overseas holiday 'day trippers' to YORK / N.YORKSHIRE

Overseas day trippers to York make up 64% of all overseas day trippers to North Yorkshire. Scarborough (17k) and Whitby (13k) are other notable day trip destinations in North Yorkshire. Overseas visitors who take day trips to York / North Yorkshire are more likely than overseas day trippers as a whole to be younger (aged under 35yrs). They are significantly more likely to be staying in the UK for over 7 nights (especially over 14 nights), visiting in the Jul to Sep period and travelling independently.

Source: IPS 2016

NORTH YORKS
(85k day trippers)

York:
54k day trippers



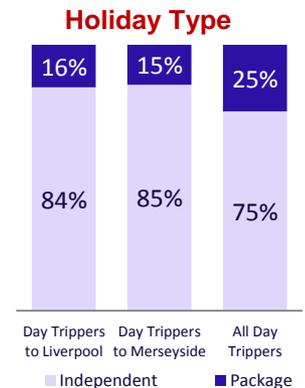
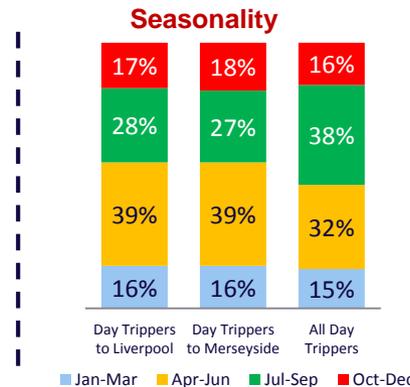
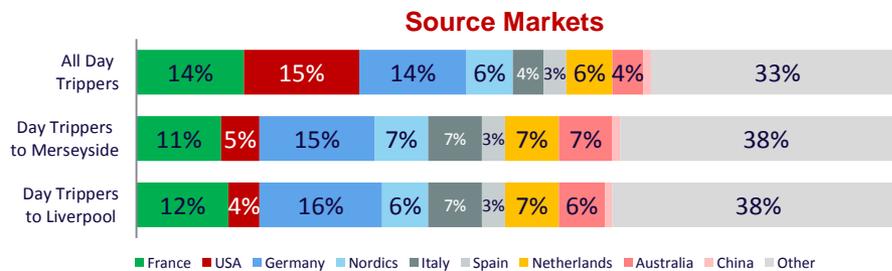
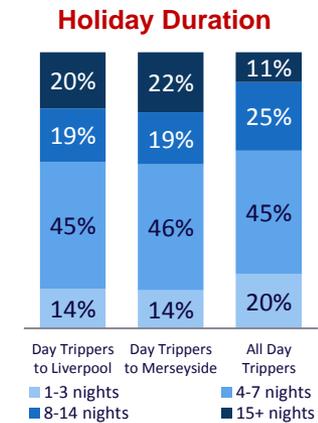
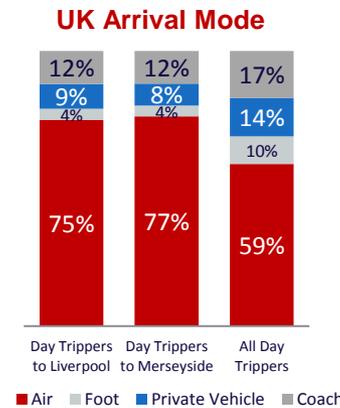
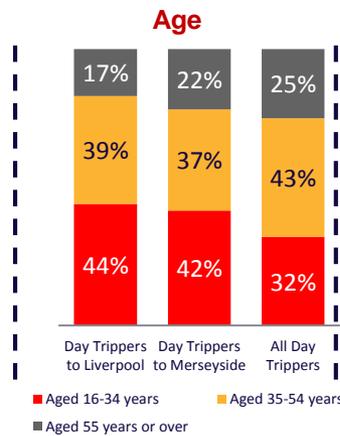
Summary of overseas holiday 'day trippers' to LIVERPOOL

Overseas visitors who take day trips to Merseyside/Liverpool are significantly more likely than overseas day trippers as a whole to be male, younger (aged 16-34 years), arriving in the UK by air (39% arriving at Manchester Airport, 10% arriving at Liverpool Airport), staying over 14 nights, be visiting in the April to June period and on an independent trip.

Source: IPS 2016

MERSEYSIDE
(74k day trippers)

Liverpool:
69k day trippers



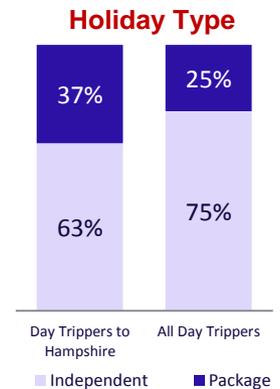
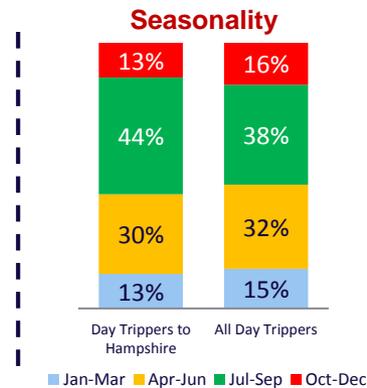
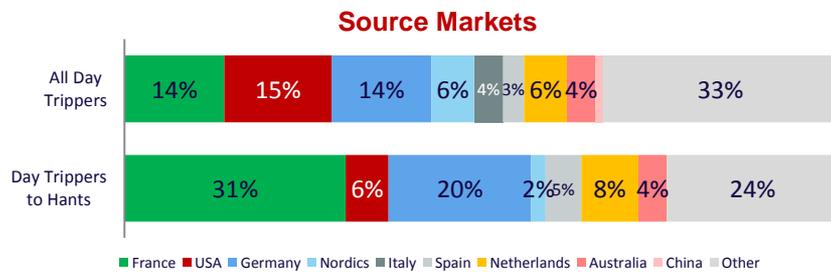
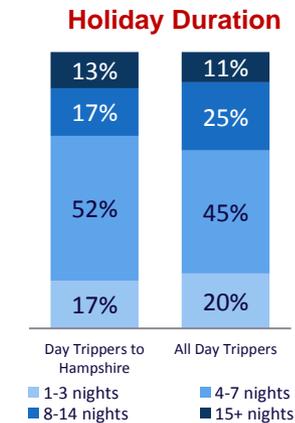
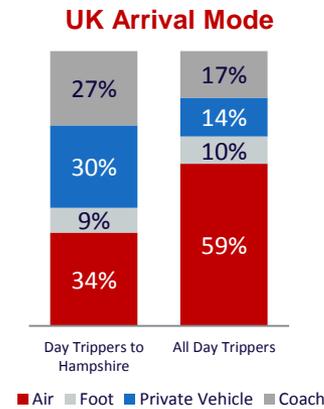
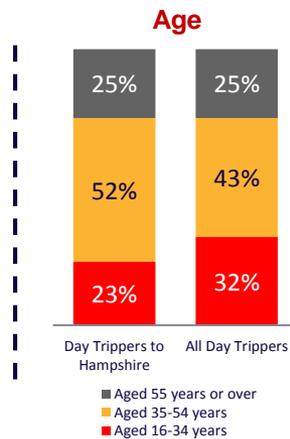
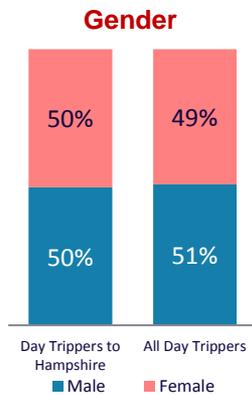
Summary of overseas holiday 'day trippers' to HAMPSHIRE

Overseas visitors who take day trips to Hampshire are significantly more likely than overseas day trippers as a whole to be aged 35-54 years, arriving in the UK by coach or private vehicle (52% arrive via a seaport), from France and be on a packaged trip.

Key day trip destinations in the county for overseas visitors are Portsmouth (46k), Winchester (32k) and Southampton (18k).

Source: IPS 2016

HAMPSHIRE
(115k
day trippers)

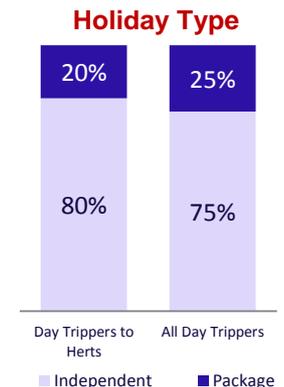
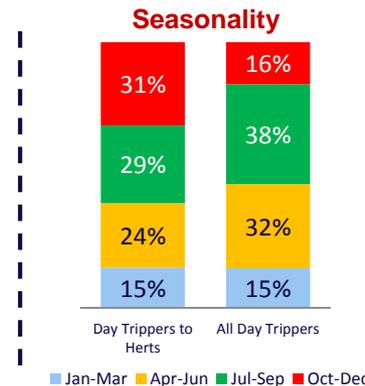
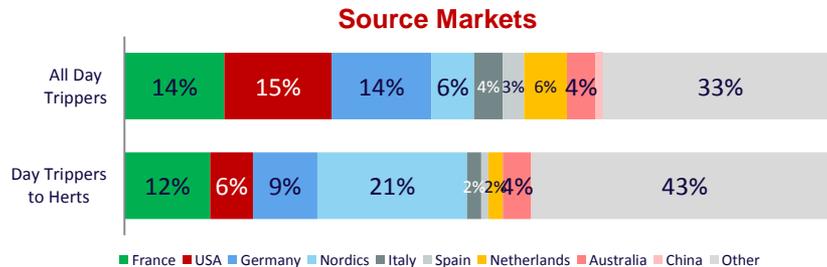
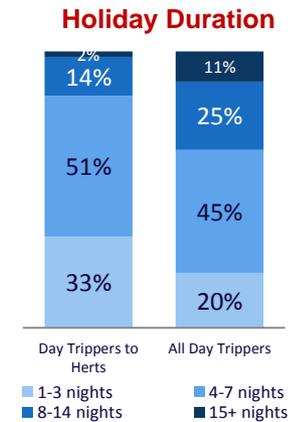
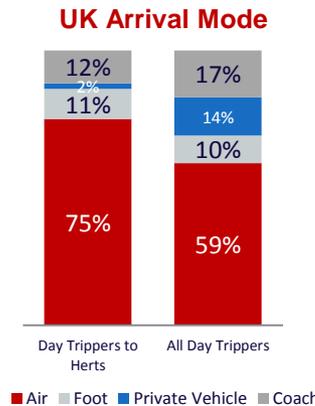
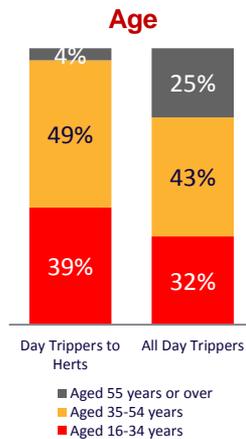
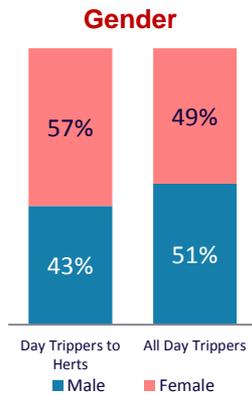


Summary of overseas holiday 'day trippers' to HERTFORDSHIRE

Overseas visitors who take day trips to Hertfordshire are more likely than overseas day trippers as a whole to be female, aged under 55 years, arriving in the UK by air (36% Heathrow, 25% Stansted, 20% Gatwick), staying less than 7 nights, from Nordic countries and visiting in the October to December period.

Source: IPS 2016

HERTFORDSHIRE
(138k day trippers)



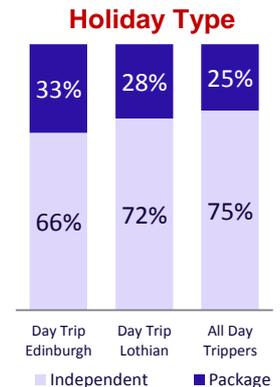
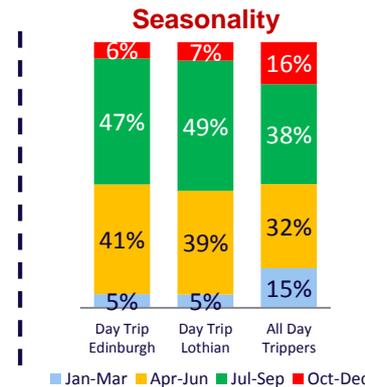
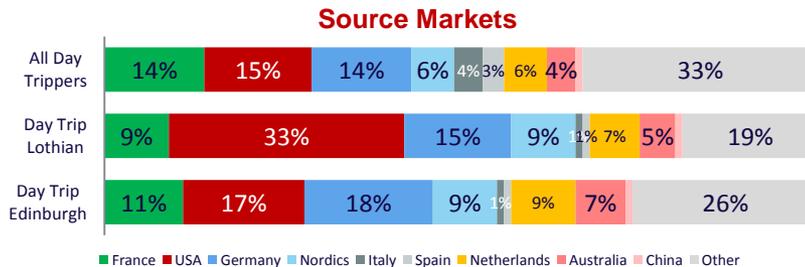
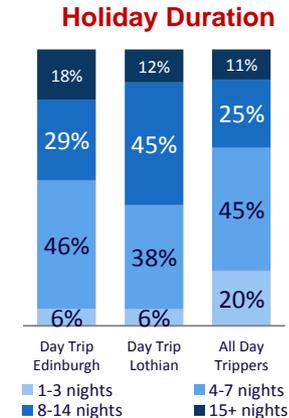
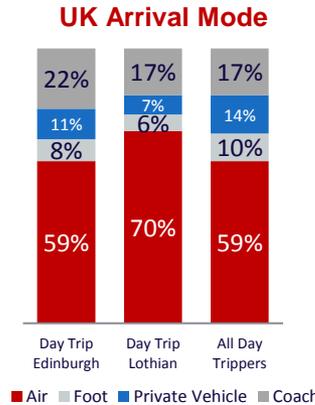
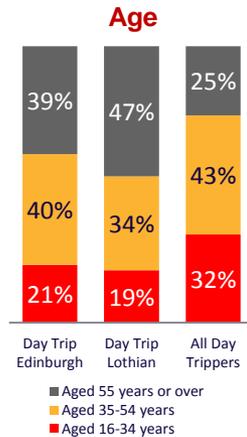
Summary of overseas holiday 'day trippers' to EDINBURGH/LOTHIAN

Overseas day trippers to Edinburgh make up 69% of all overseas day trippers to Lothian. They are more likely than overseas day trippers as a whole to be aged 35-54, visiting for 15+ nights and arranging their trip through a package. Overseas day trippers to Lothian are significantly more likely than overseas day trippers as a whole to be older (aged 55 and over), arriving by air and staying 8-14 nights.

Source: IPS 2016

LOTHIAN
(138k day trippers)

Edinburgh:
95k day trippers



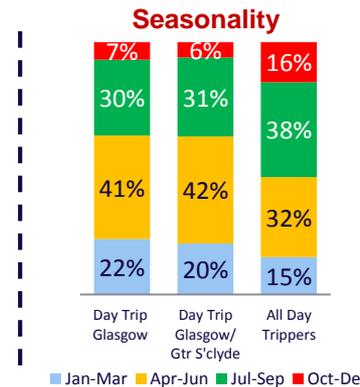
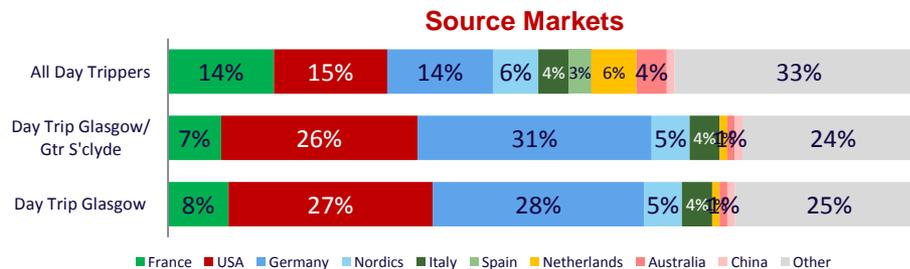
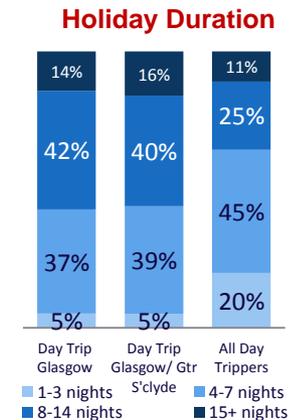
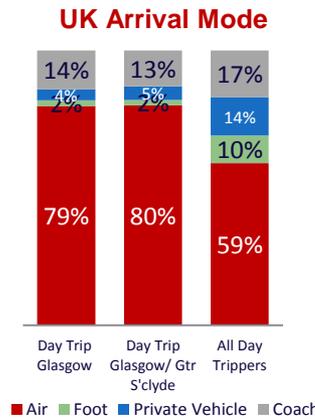
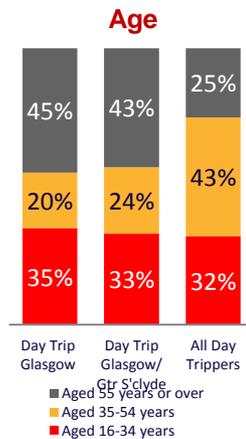
Summary of overseas holiday 'day trippers' to GLASGOW - GTR ST'CLYDE/ GLASGOW

Overseas visitors who take day trips to Glasgow/ Strathclyde are more likely than overseas day trippers as a whole to be older (aged 55 and over), arriving by air and arranging their trip via a package holiday.

Source: IPS 2016

**GLASGOW/
GTR STRATHCLYDE
(100k
day trippers)**

**Glasgow:
92k day trippers**

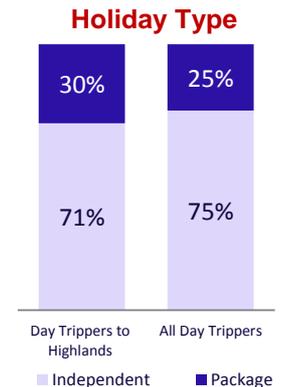
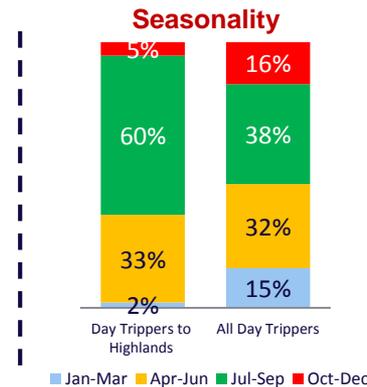
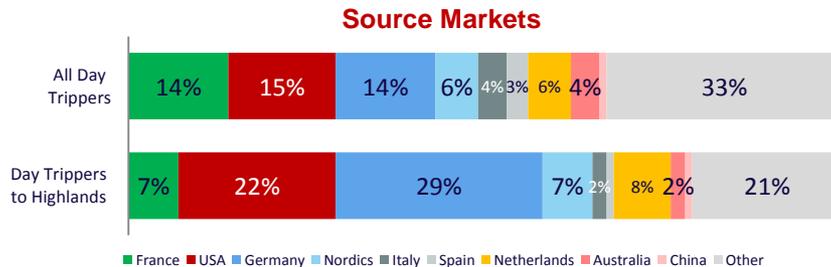
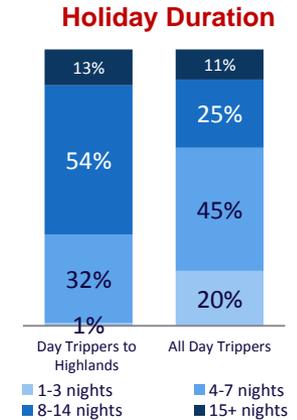
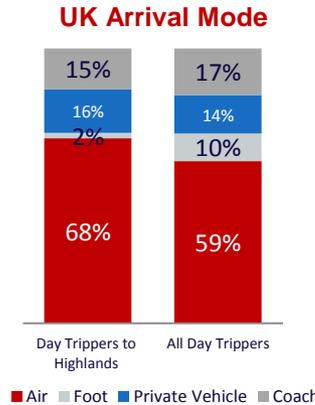
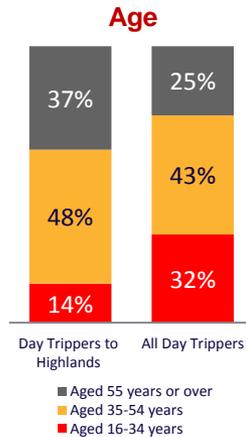


Summary of overseas holiday 'day trippers' to HIGHLANDS

Overseas visitors who take day trips to Highlands are significantly more likely than overseas day trippers as a whole to be older (aged 35 and over), arriving by air, staying 8-14 nights and visiting between July and September.

Source: IPS 2016

HIGHLANDS
(129k
day trippers)

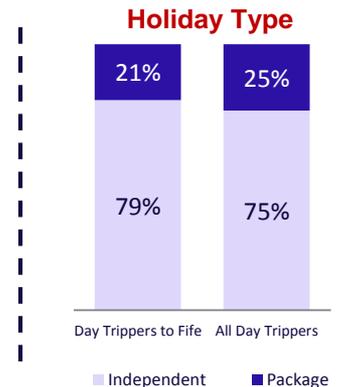
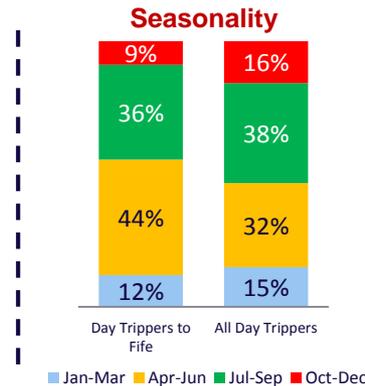
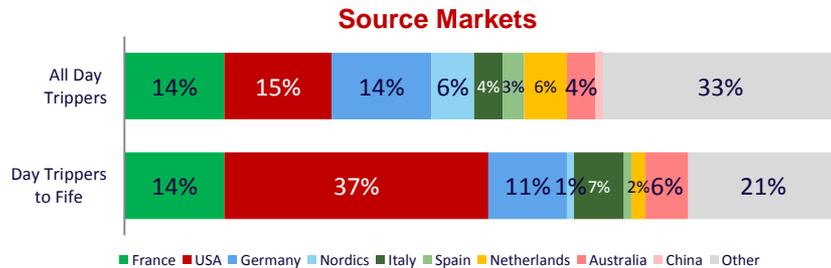
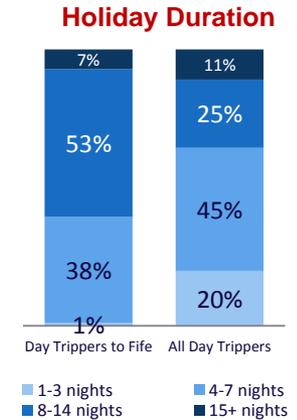
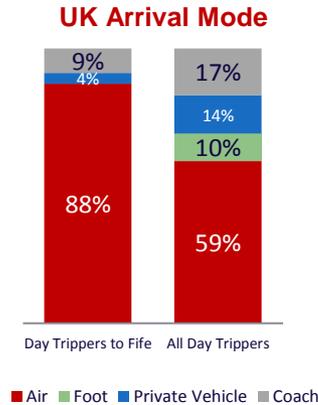
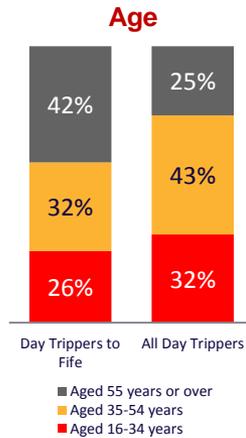
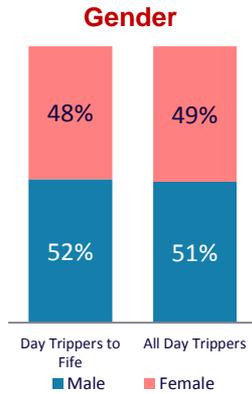


Summary of overseas holiday 'day trippers' to FIFE

Overseas visitors who take day trips to Fife are significantly more likely than overseas day trippers as a whole to be older (aged 55 and over), arriving by air and staying 8-14 nights.

Source: IPS 2016

FIFE
(81k
day trippers)



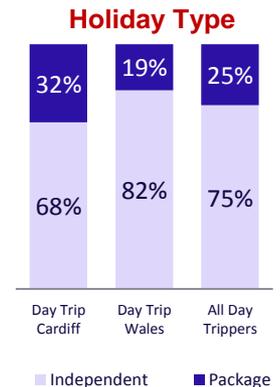
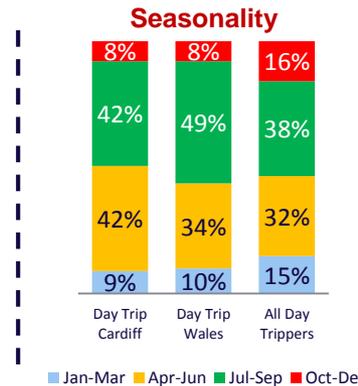
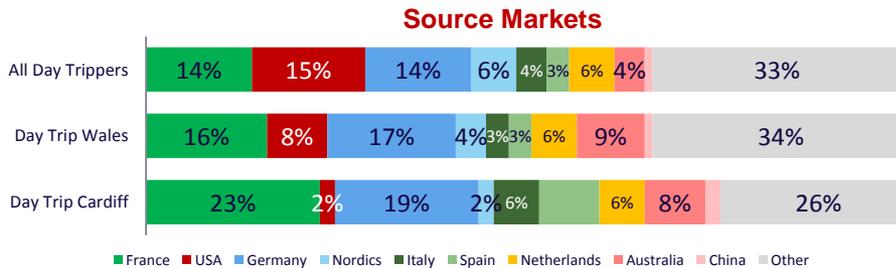
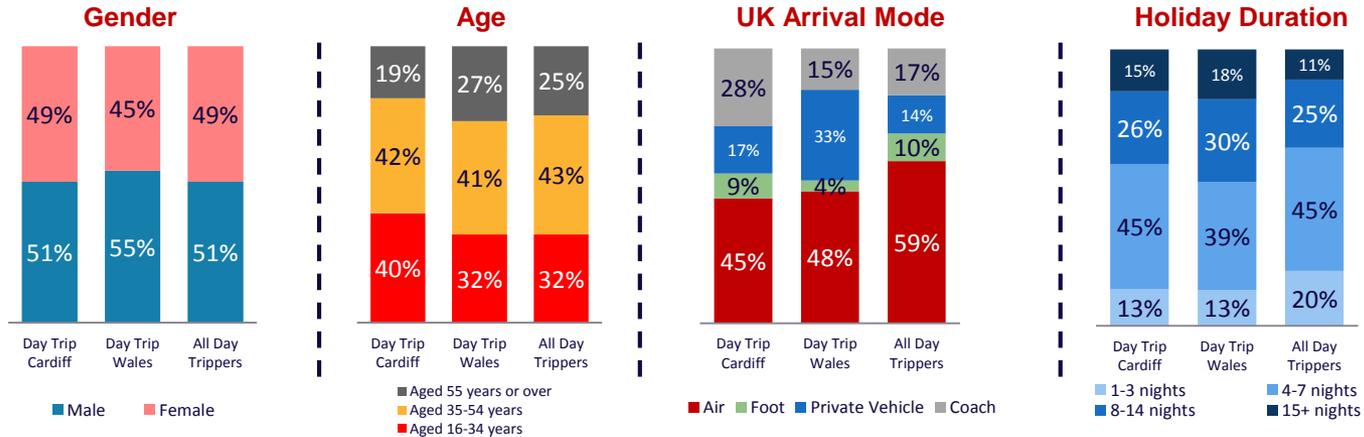
Summary of overseas holiday 'day trippers' to CARDIFF/WALES

Overseas day trippers to Cardiff make up 33% of all overseas day trippers to Wales. Overseas day trippers to Cardiff are much more likely than overseas day trippers as a whole to be younger (aged 16-34), arriving by coach and arranging via a package holiday. Conversely, when looking at overseas day trippers to Wales, they are more likely than overseas day trippers as a whole to be older (aged 55 over) arrive by private vehicle and arrange the trip independently.

Source: IPS 2016

WALES
(159k day trippers)

Cardiff:
53k day trippers





Further information

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