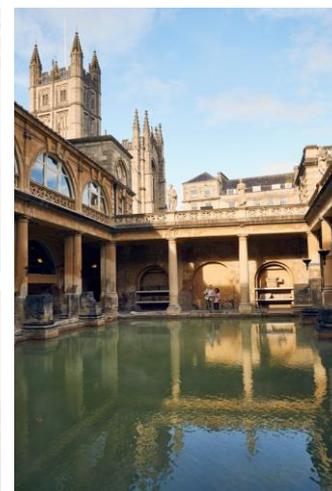
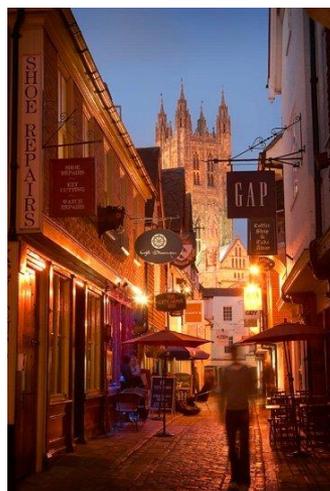


Discover England: summary insights on overseas visitors to England's regions

Destination Summary Reports

October 2017



Report contents

1. **Introduction:** Including research sources, report rationale and sample (*Pages 3-7*)

2. **Destination Summaries** (*Pages 9-88*)
 - Bath (*Pages 9-13*)
 - Birmingham (*Pages 14-17*)
 - Bournemouth (*Pages 18-21*)
 - Brighton and Hove (*Pages 22-25*)
 - Bristol (*Pages 26-29*)
 - Cambridge (*Pages 30-33*)
 - Canterbury (*Pages 34-37*)
 - Eastbourne (*Pages 38-41*)
 - Exeter (*Pages 42-45*)
 - Hastings (*Pages 46-49*)
 - Leeds (*Pages 50-53*)
 - Liverpool (*Pages 54-57*)
 - London (*Pages 58-61*)
 - Manchester (*Pages 62-65*)
 - Newcastle Upon Tyne (*Pages 66-69*)
 - Nottingham (*Pages 70-73*)
 - Oxford (*Pages 74-77*)
 - Stratford Upon Avon (*Pages 78-81*)
 - Windsor (*Pages 82-85*)
 - York (*Pages 86-88*)



VisitEngland

Introduction

Background

The three-year £40million Discover England Fund was announced by the Government in 2016, with the objective of ensuring that England stays competitive in the rapidly growing global tourism industry, by offering world-class English tourism products to the right customers at the right time. The fund will be awarded to external bidders, with awards for two blocks of projects.

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

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

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

About this report/1

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 provides a summary of the demographics and behaviours of overseas visitors to 20 of England's destinations. Each destination is given a four page summary. Due to base sizes, the majority of results are based upon questions asked on the 2014, 2015 and 2016 IPS surveys. Some questions were only asked in one of these years – for example, questions on day visit were only asked in 2016. For destinations where 'single year' base sizes are too low, this data has not been reported.

This report defines 'destinations' as the 20 cities/towns in England that were most visited by overseas visitors between 2014 and 2016. The destinations featured in this report are Manchester, Manchester, Liverpool, Brighton and Hove, Oxford, Bath, Birmingham, York, Bristol, Cambridge, Canterbury, Newcastle upon Tyne, Eastbourne, Bournemouth, Windsor, Hastings, Stratford Upon Avon, Leeds, Nottingham and Exeter. Please note that although Dover is in the top 20 most visited destinations, it's role as a 'gateway destination' to the UK suggests that the majority of these visitors are 'transient' and travelling elsewhere. Dover is therefore excluded from this analysis. The main focus of this report is overseas holiday visitors – these are predominantly referred to as 'holiday visitors' throughout the report.

The report also refers to 'target markets'. These are France, Germany, USA, Spain, Italy, Netherlands, Australia and The Nordics (Sweden, Norway, Denmark, Finland and Iceland). Markets have been chosen due to their current high volume of visits to England.

Due to the way in which the IPS questionnaire for 2016 was asked, it is not possible to explicitly link where visitors were staying with their daytrip destination, if they stayed in more than one destination overnight. Daytrip data is therefore calculated by measuring the origin and destination of 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. Day trip data that does not link origin and destination is taken from the whole dataset.

About this report/2

Each town/city summary lists the top gateway regions used by visitors to these destinations. Gateways refer to the area of the country that visitors entered on arrival in the UK. Each region is defined as below:

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

Through this report reference is made to ‘mode of travel’ to the UK based on where visitors are exiting the UK. We have made the assumption that entry point will largely correspond with exit point, and so ‘mode of travel’ is intermittently referred to as ‘mode of arrival’ throughout the report.

About this report/3

The table below outlines the destinations featured in this report, along with base sizes for each year. Due to small base sizes, the majority of charts are reported as an average of 2014-16 data. For destinations with total 2014-16 base sizes of 300 or below, single year data should be treated indicatively only. For these destinations movements from year to year are likely to be driven by sample size, so commentary has not been provided.

Destination	Base Sizes											
	2012		2013		2014		2015		2016		2014-16	
	All	Holiday	All	Holiday	All	Holiday	All	Holiday	All	Holiday	All	Holiday
Bath	287	149	387	235	317	179	366	210	379	213	1,062	602
Birmingham	942	160	1,059	185	907	168	961	174	957	147	2,825	489
Bournemouth	211	70	187	71	169	57	181	66	186	77	536	200
Brighton and Hove	348	151	412	197	384	188	428	191	398	166	1,210	545
Bristol	529	138	601	182	592	151	609	175	667	190	1,868	516
Cambridge	504	155	517	159	473	141	441	110	511	168	1,425	419
Canterbury	182	92	199	106	174	90	175	92	157	73	506	255
Eastbourne	79	34	89	46	100	55	114	61	93	46	307	162
Exeter	98	32	142	61	110	48	132	57	129	52	371	157
Hastings	81	41	80	44	70	49	109	76	63	33	242	158
Leeds	364	79	343	66	331	60	353	83	334	65	1,018	208
Liverpool	704	209	740	260	729	265	718	227	729	264	2,176	756
London	20,381	9,034	21,835	10,131	20,725	9,536	20,206	9,107	19,800	8,931	60,731	27,574
Manchester	1,442	342	1,490	345	1,348	316	1,501	361	1,373	319	4,222	996
Newcastle Upon Tyne	261	103	249	104	280	108	295	103	320	104	895	315
Nottingham	250	55	265	56	253	44	204	48	262	55	719	147
Oxford	612	193	668	239	651	247	632	205	601	242	1,884	694
Stratford Upon Avon	118	60	149	83	155	79	143	72	119	57	417	208
Windsor	270	79	271	77	241	84	255	79	256	68	752	231
York	357	204	419	252	400	245	356	206	344	190	1,100	641



VisitEngland

Destination Summaries

Key differences and highlights among the top 20 English destinations for inbound holiday trips



London and Liverpool have the highest spend per night

Bristol and Exeter have the lowest spend per night

55+
York and Exeter have an older demographic visiting

Eastbourne and Hastings have the highest proportion of children visiting

80%
of day trips from Bristol are to Bath

48% of those staying in Exeter visit a national park

Over half of visitors to Bristol, Bath, Exeter and Bournemouth visit during July - September



17% of visitors to Leeds are from Spain

Stratford-upon-Avon and Brighton receive more visitors from France



York, Bath and Stratford-upon-Avon and Brighton receive more visitors from the USA

Hastings and Eastbourne receive more visitors from Germany



Brighton and Bath have the highest proportion of holiday visitors



Nottingham and Bristol have the highest proportion of VFR visitors



Birmingham has the highest proportion of business visitors



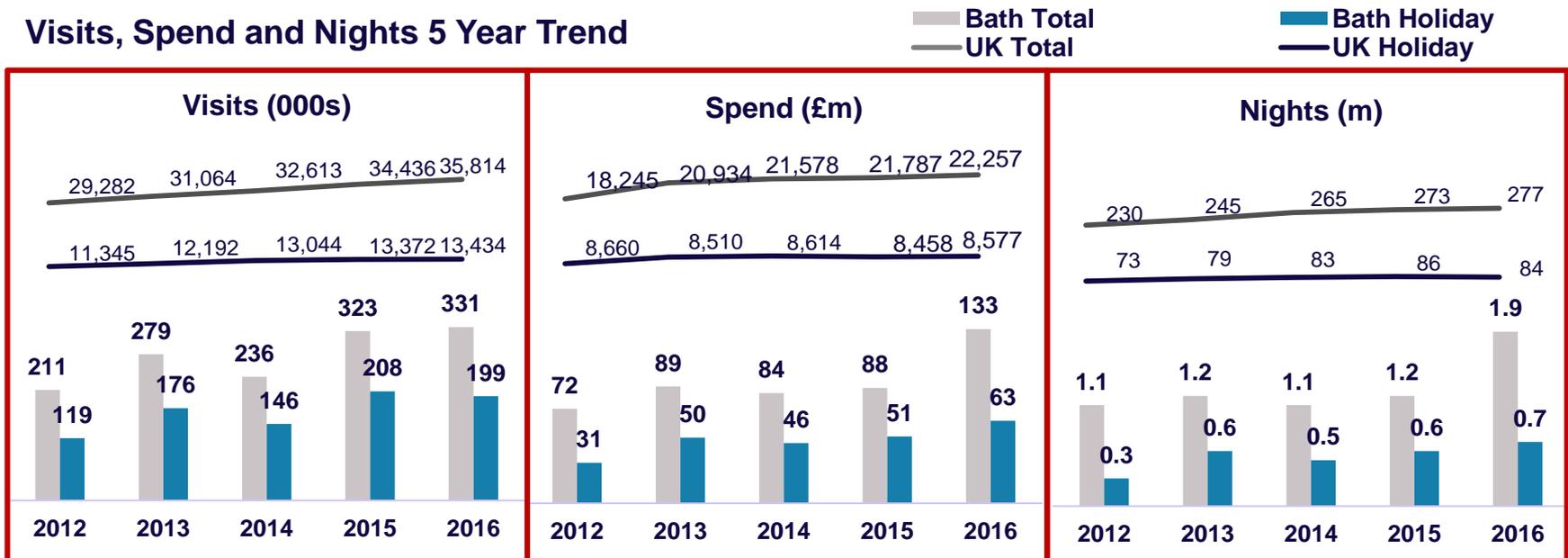
Headline stats: Overseas visits, spend and nights to Bath

Bath attracts nearly 300,000 overseas visitors each year, nearly 200,000 of which are visiting for a holiday.

Visits, Spend and Nights to Bath 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Bath Total	297	Bath Total	102	Bath Total	1.4
Bath Holiday	185	Bath Holiday	53	Bath Holiday	0.6

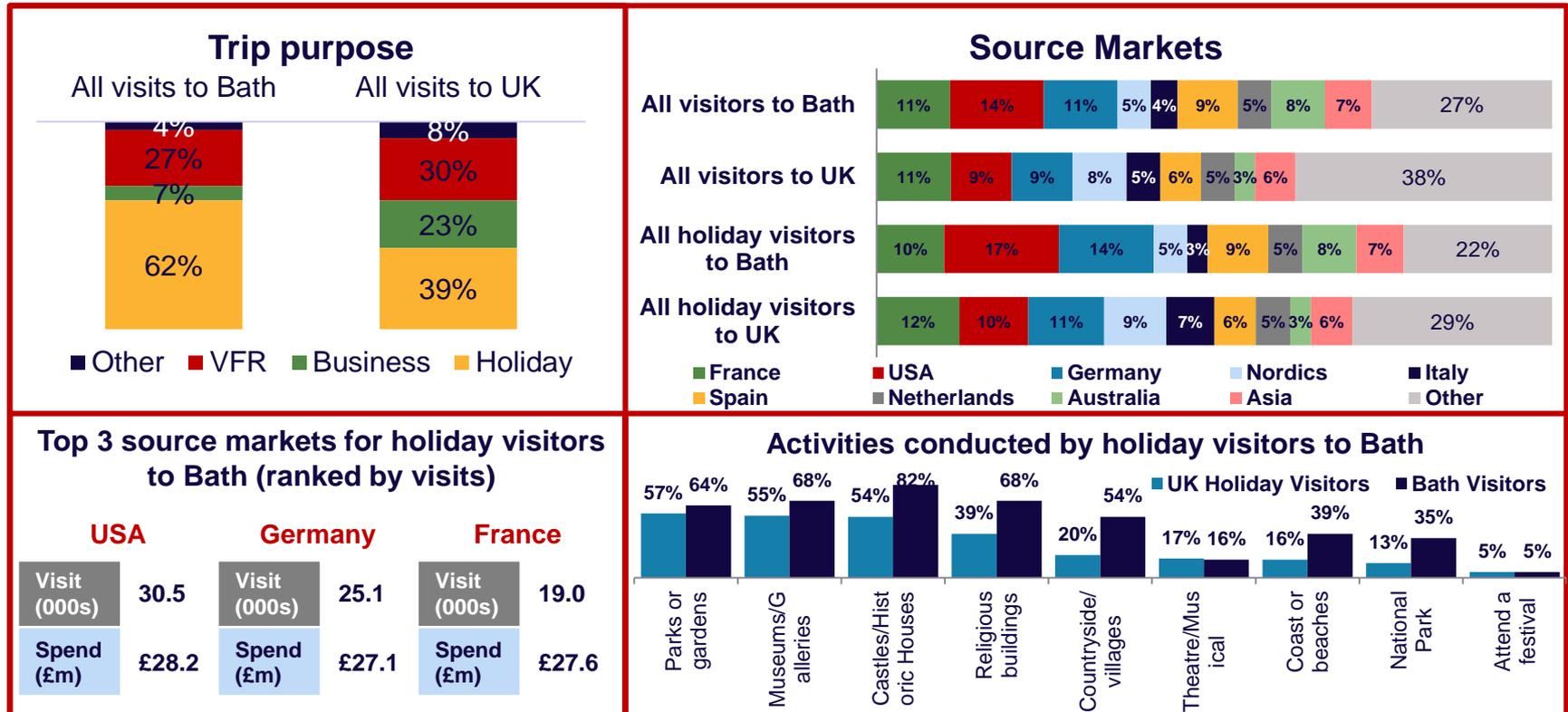
Visits, Spend and Nights 5 Year Trend



Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

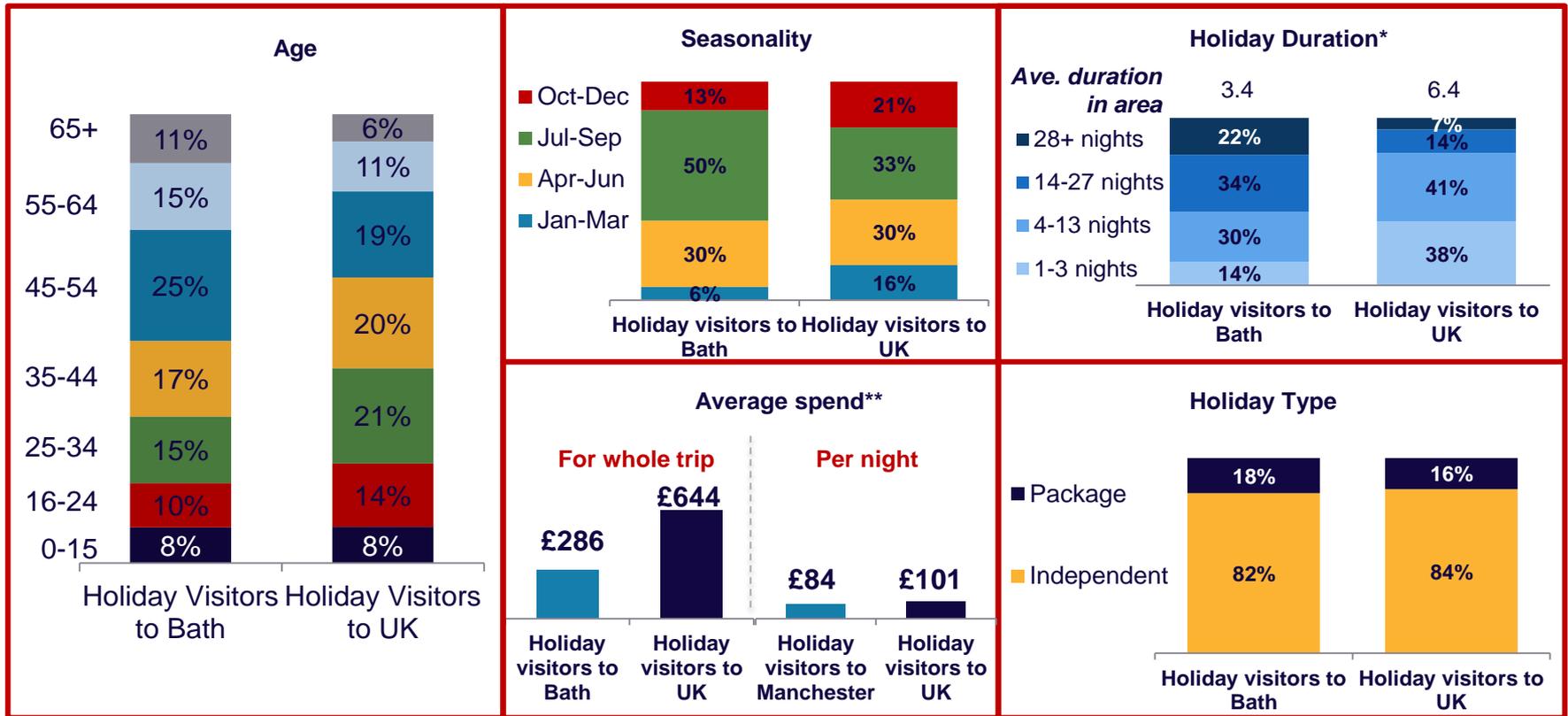
Trip purpose and source markets: All visitors and holiday visitors

Nearly two thirds of overseas visits to Bath are for a holiday, around 3 in 10 to visit family and friends. Bath attracts a significantly higher than average proportion of visitors from the USA (their top market) and Germany (their second highest visiting market). Holiday visitors are more likely than average to engage in cultural activities.



Demographics and holiday characteristics: Holiday visitors

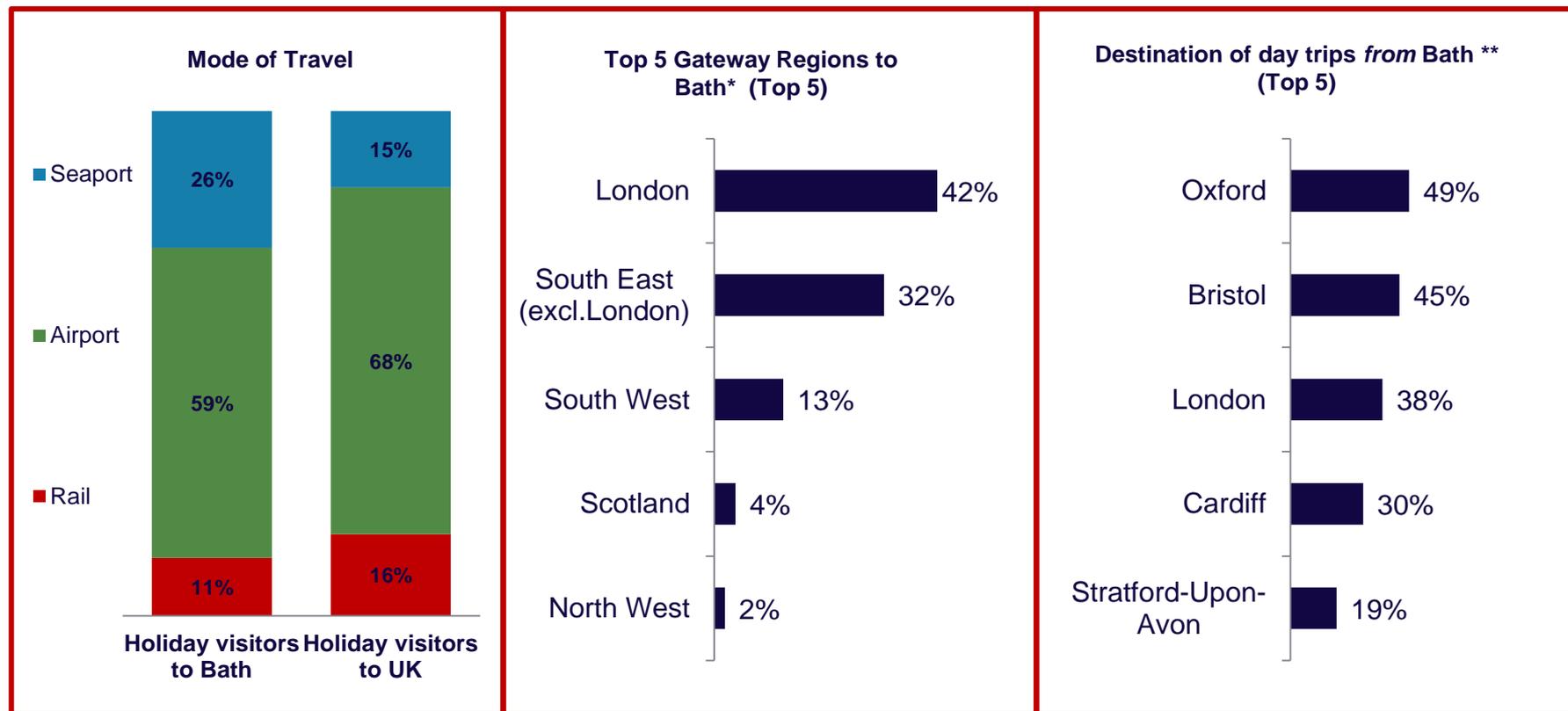
Holiday visitors to Bath tend to be older than the average UK holiday visitor, and significantly more likely to be visiting between July and September. They stay 3.4 nights on average.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Around 1 in 4 holiday visitors to Bath arrive via a seaport. London and the South East are the most common gateway regions, although around 1 in 8 arrive via the South West. Oxford, Bristol and London are the most common day trip destinations from Bath.



Headline stats: Overseas visits, spend and nights to Birmingham

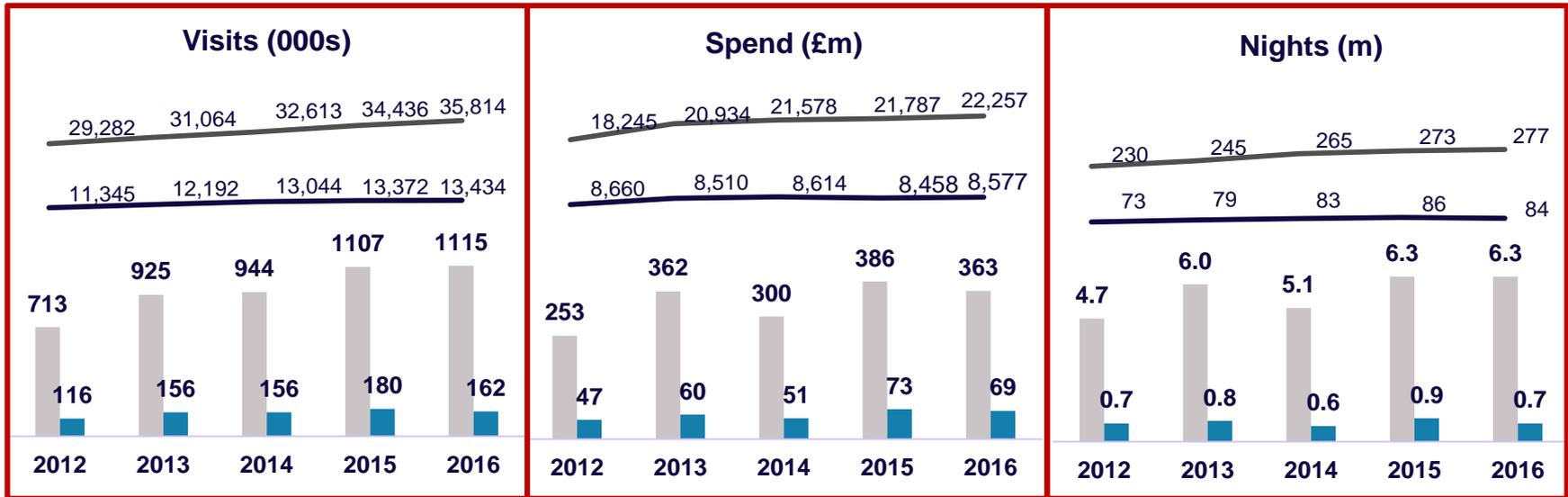
Overseas visits to Birmingham have increased every year for the last 5 years. Holiday visits, spend and nights are significantly higher than in 2012 although lower than in 2015.

Visits, Spend and Nights to Birmingham 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Birmingham Total	1,055	Birmingham Total	349	Birmingham Total	5.9
Birmingham Holiday	166	Birmingham Holiday	64	Birmingham Holiday	0.8

Visits, Spend and Nights 5 Year Trend

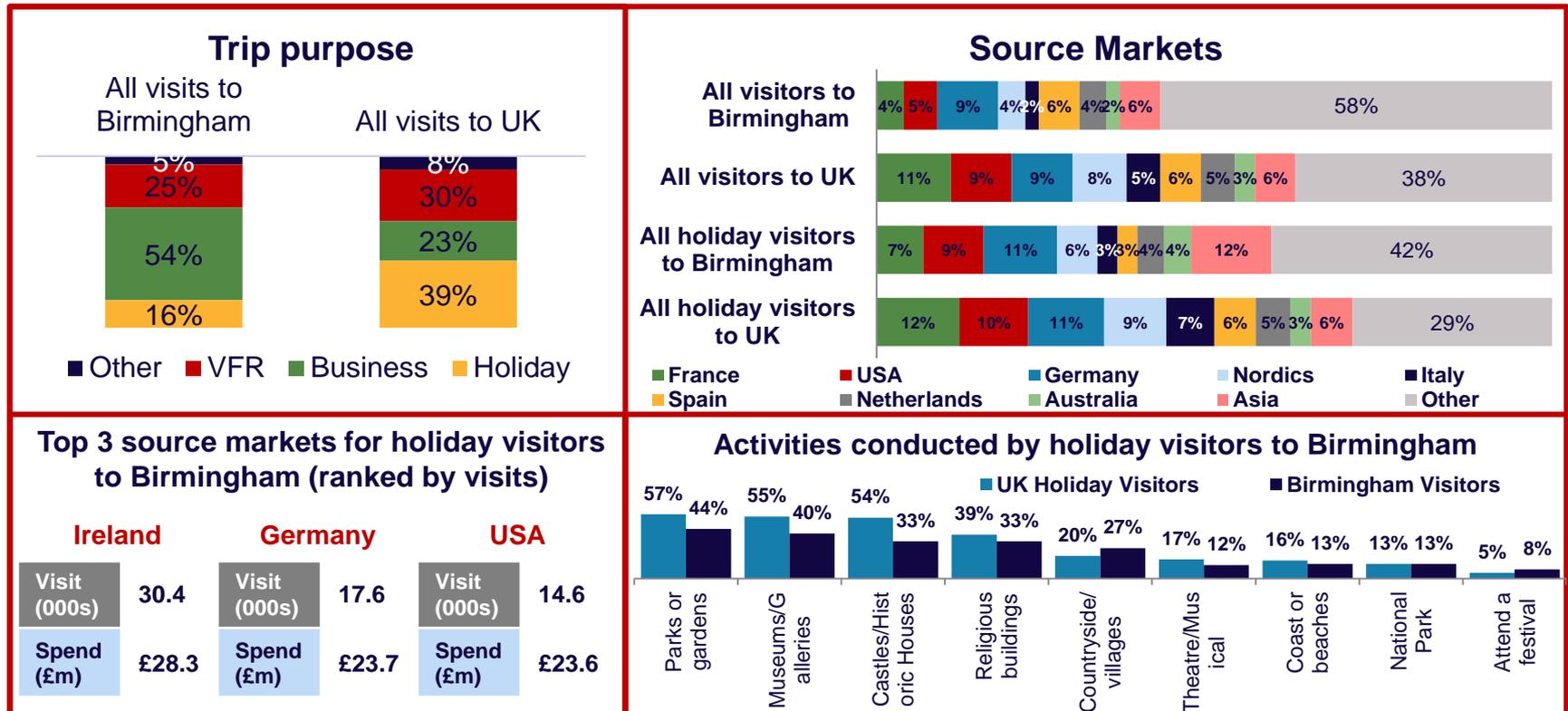
■ Birmingham Total ■ Birmingham Holiday
— UK Total — UK Holiday



Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

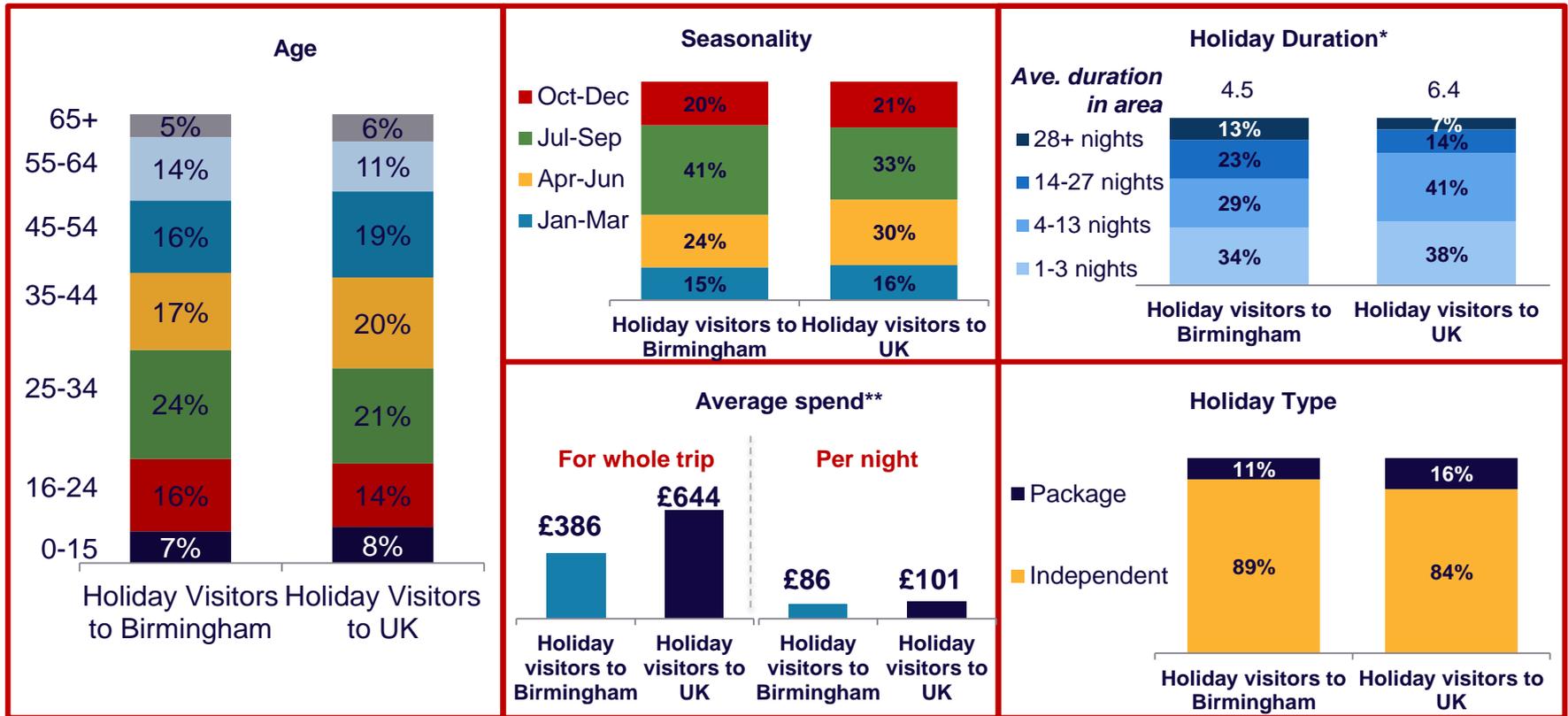
Trip purpose and source markets: All visitors and holiday visitors

Over half of overseas visits to Birmingham are for business purposes (more than twice the UK average), only 1 in 6 for a holiday. Birmingham is more likely than average to attract holiday visitors from Ireland and Asia. Holiday visitors are less likely than UK visitors on the whole to engage in cultural activities although visiting parks and gardens and museums are the most common activity.



Demographics and holiday characteristics: Holiday visitors

Overseas holiday visits to Birmingham are most likely to take place in July to September and to be booked independently. On average holiday visitors stay 4.5 nights in Birmingham.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Airport is the most common arrival mode for holiday visitors to Birmingham, and the West Midlands the top gateway region. Around 1 in 4 arrive via London, 1 in 5 via the South East.



Headline stats: Overseas visits, spend and nights to Bournemouth

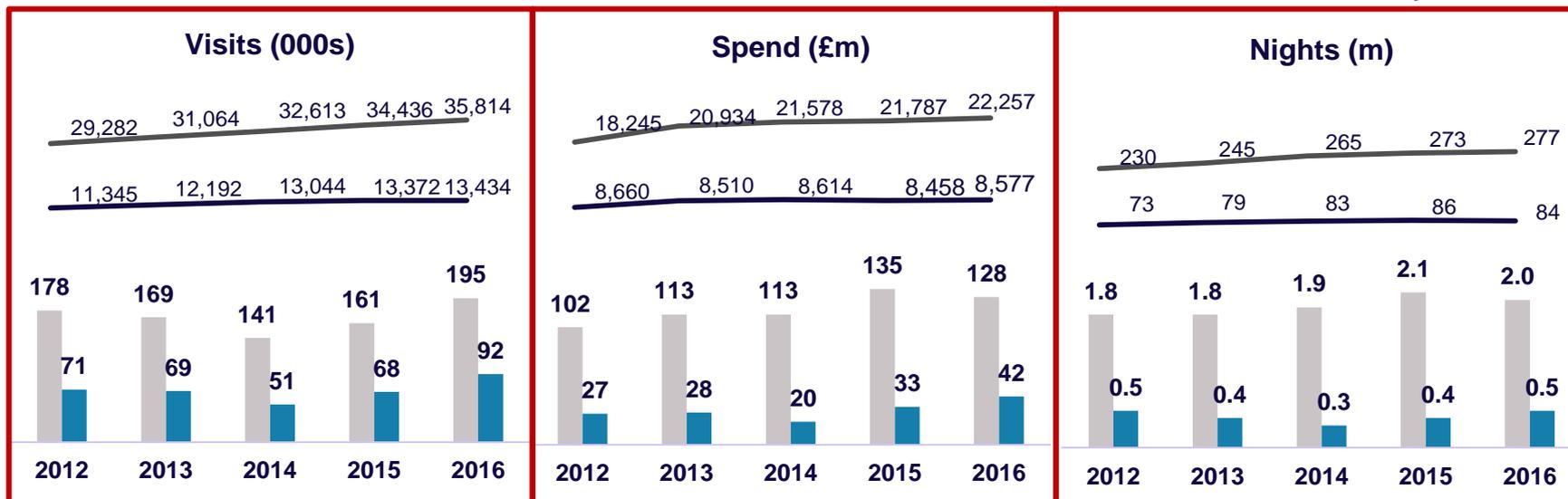
The number of overall visits to Bournemouth has steadily increased from 2014 to 2016, 166,000 thousand attracted on average.

Visits, Spend and Nights to Bournemouth 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Bournemouth Total	166	Bournemouth Total	125	Bournemouth Total	2.0
Bournemouth Holiday	70	Bournemouth Holiday	32	Bournemouth Holiday	0.4

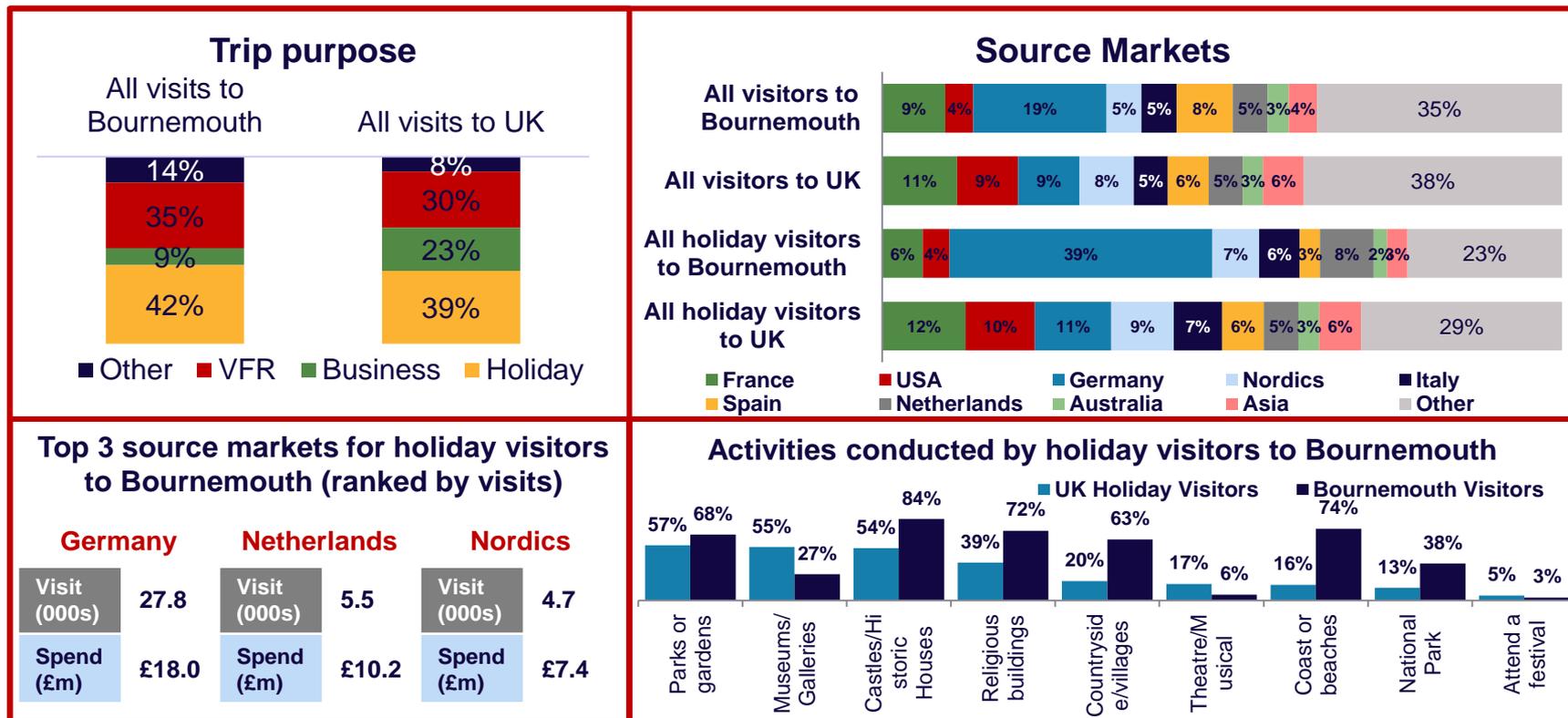
Visits, Spend and Nights 5 Year Trend

■ Bournemouth Total ■ Bournemouth Holiday
— UK Total — UK Holiday



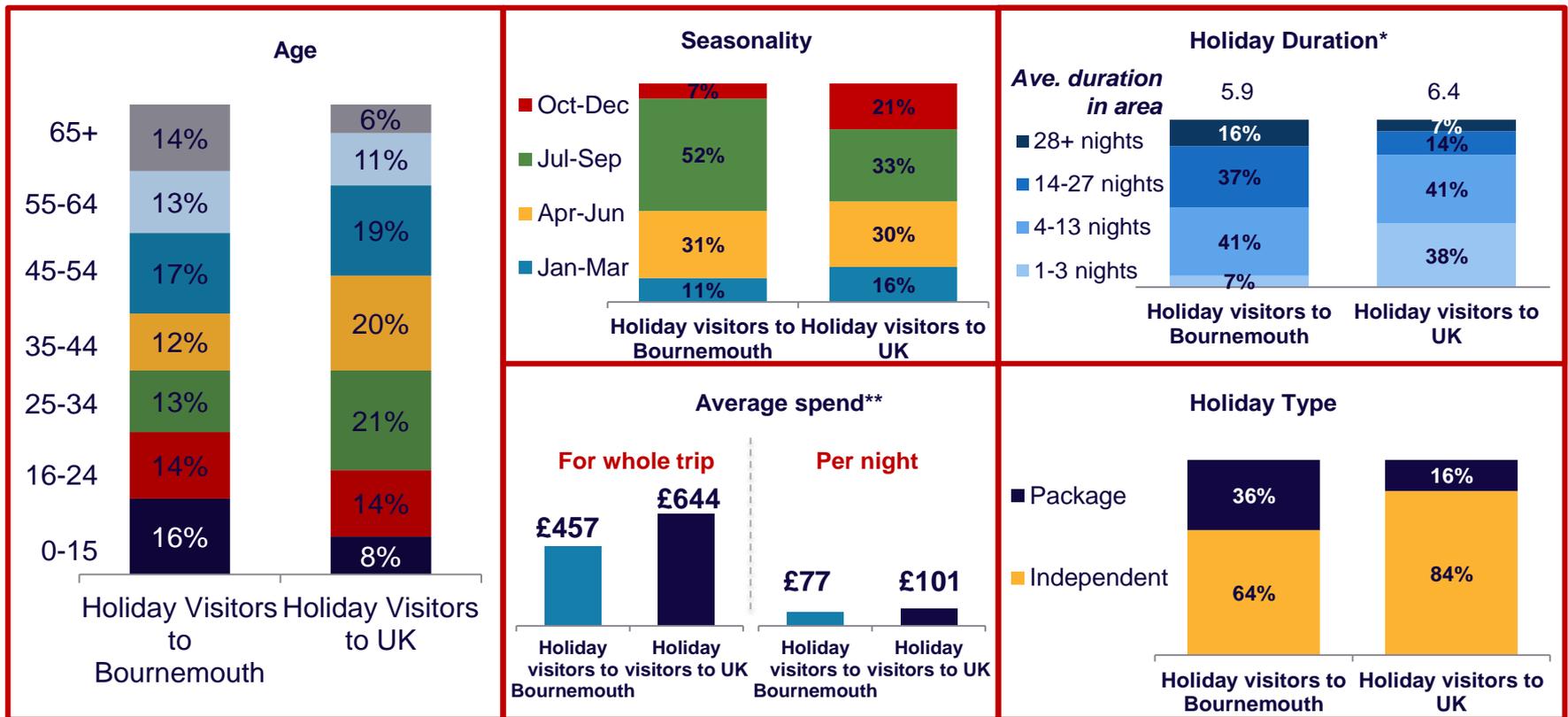
Trip purpose and source markets: All visitors and holiday visitors

Visits to Bournemouth are most often for the purpose of holiday, followed by visiting friends or relatives. A significant proportion (39%) of overseas holiday visitors to Bournemouth are from Germany. Top activities conducted by holiday visitors to Bournemouth include visiting castles/ historic houses, coast/beaches and religious buildings. These visitors are less likely than the UK average to visit museums/galleries.



Demographics and holiday characteristics: Holiday visitors

Holiday visitors to Bournemouth are more likely than average to be older, visiting in the peak summer season and to have booked through a holiday package. These holiday visitors often stay for a longer duration than other destinations, on average 5.9 nights.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Holiday visitors to Bournemouth are equally likely to arrive by seaport or airport. The top 2 gateway regions to Bournemouth are the South East and London.



Headline stats: Overseas visits, spend and nights to Brighton and Hove

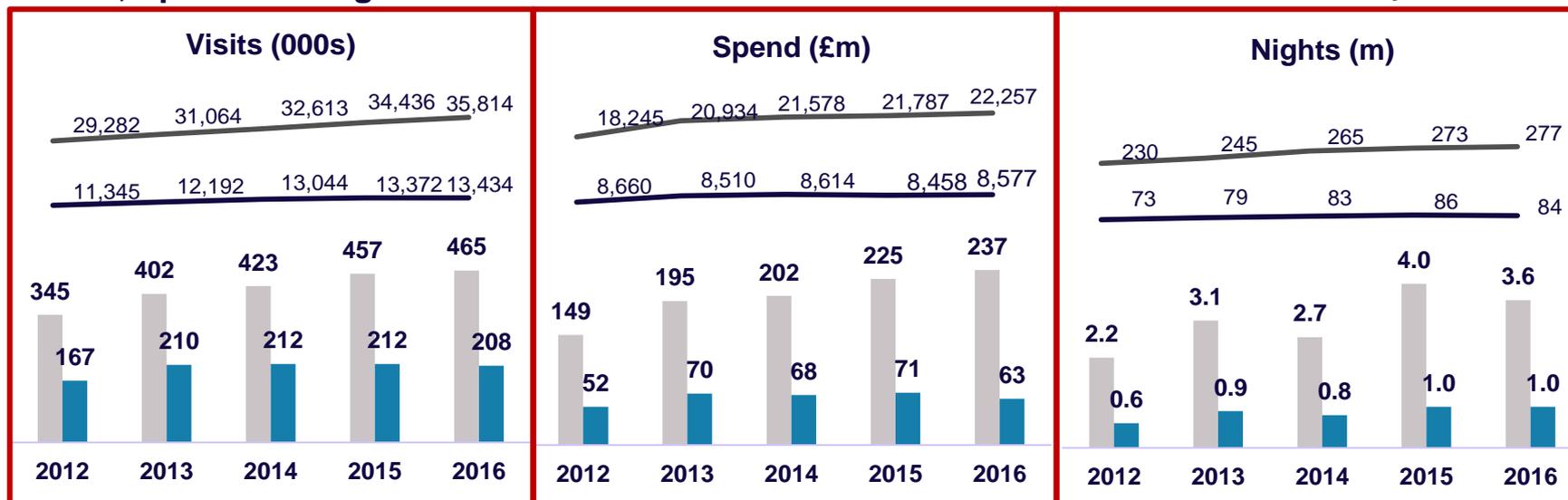
Brighton and Hove total visits and spend has increased since 2012, with average annual visits standing at 448,000 around half of which are holiday visits.

Visits, Spend and Nights to Brighton and Hove 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Brighton & Hove Total	448	Brighton & Hove Total	221	Brighton & Hove Total	3.4
Brighton & Hove Holiday	211	Brighton & Hove Holiday	67	Brighton & Hove Holiday	1.0

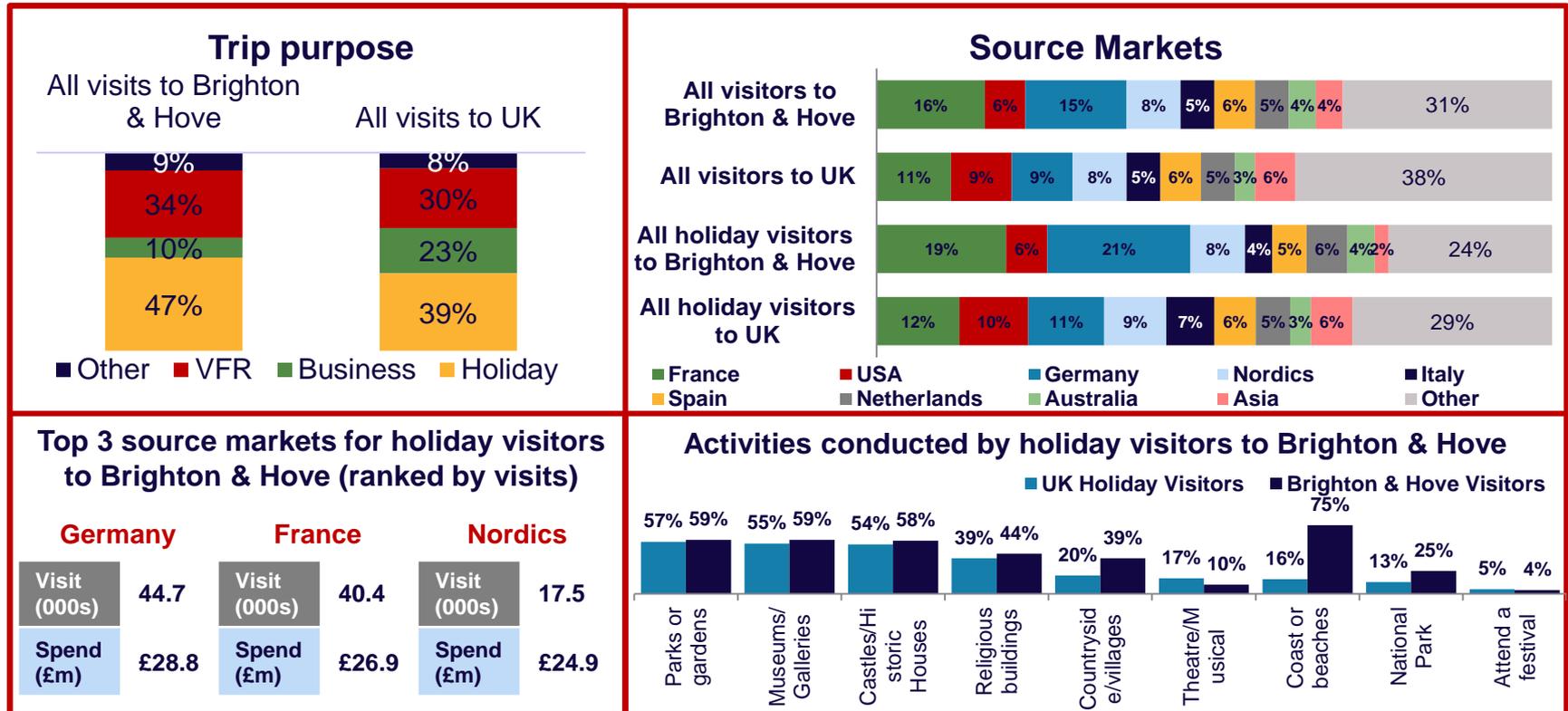
Visits, Spend and Nights 5 Year Trend

■ Brighton & Hove Total ■ Brighton & Hove Holiday
— UK Total — UK Holiday



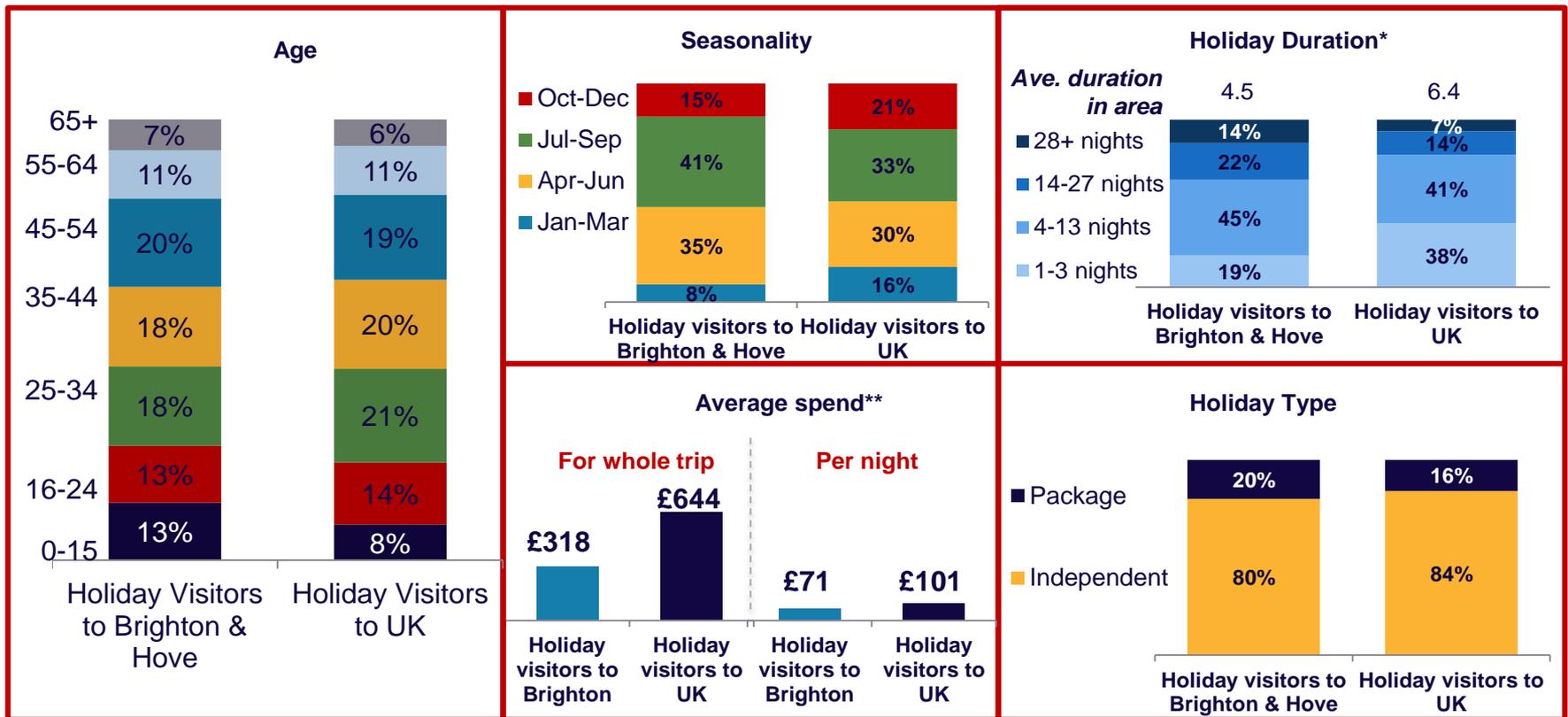
Trip purpose and source markets: All visitors and holiday visitors

Nearly half of all visits to Brighton & Hove are for the purpose of holiday and around a third for visiting friends or relatives, higher than the UK average. Germany and France are the top two source markets for holiday visitors to Brighton & Hove, both significantly higher than the UK average. Unsurprisingly, three quarters of holiday visitors to Brighton & Hove visit the coast/beaches.



Demographics and holiday characteristics: Holiday visitors

Holiday visitors to Brighton & Hove are more likely than the UK average to be visiting in the summer or spring and on a package holiday. Holiday visitors stay an average of 4.5 nights in Brighton & Hove.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Holiday visitors to Brighton & Hove are more likely to arrive via seaport than the UK average, perhaps explaining the higher incidence of visitors from France. The top 2 gateway regions to Brighton & Hove are South East and London.



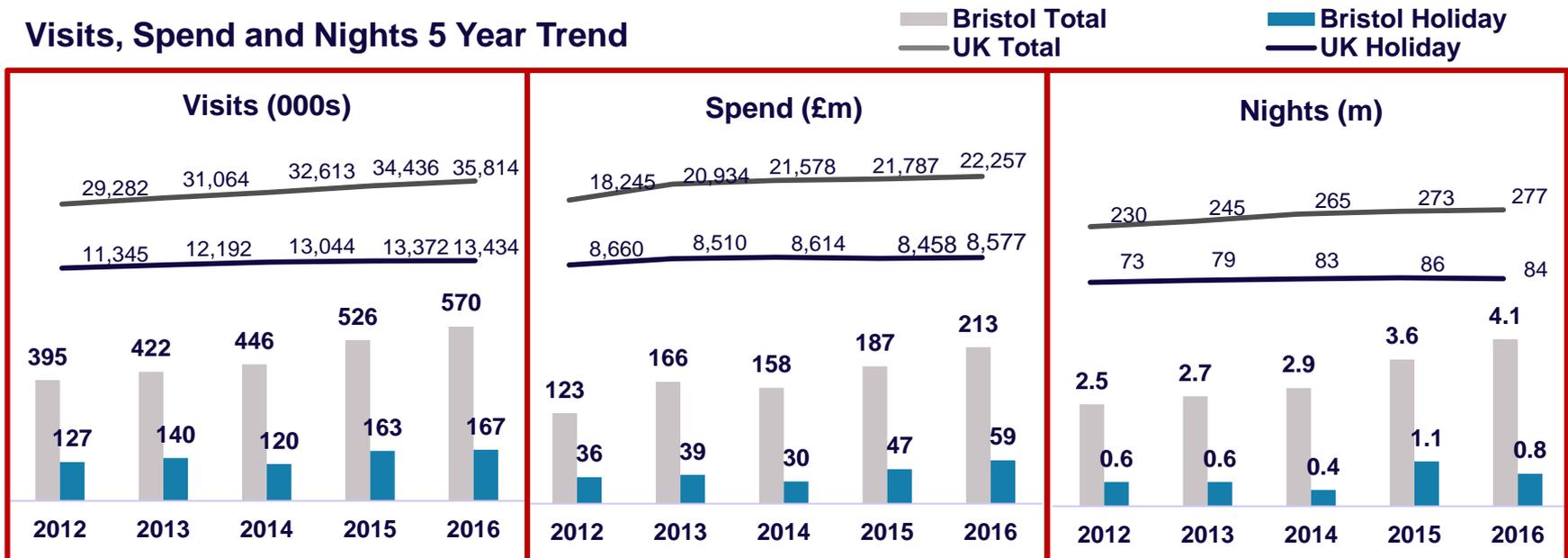
Headline stats: Overseas visits, spend and nights to **Bristol**

On average, Bristol attracts over 500,000 overseas visitors each year, 150,000 of whom are visiting for a holiday. Holiday visits, spend and nights have increased in the last 5 years.

Visits, Spend and Nights to Bristol 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Bristol Total	514	Bristol Total	186	Bristol Total	3.5
Bristol Holiday	150	Bristol Holiday	46	Bristol Holiday	0.8

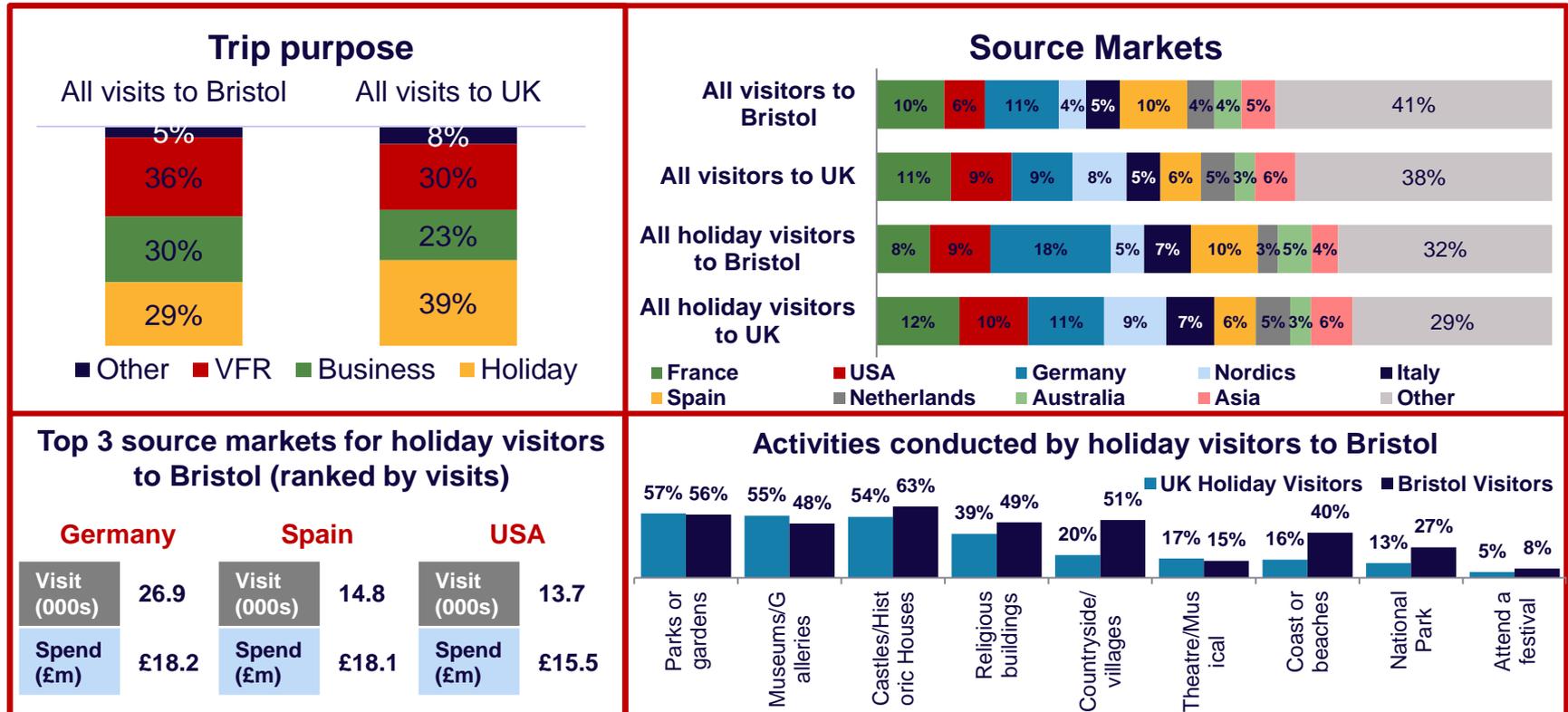
Visits, Spend and Nights 5 Year Trend



Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

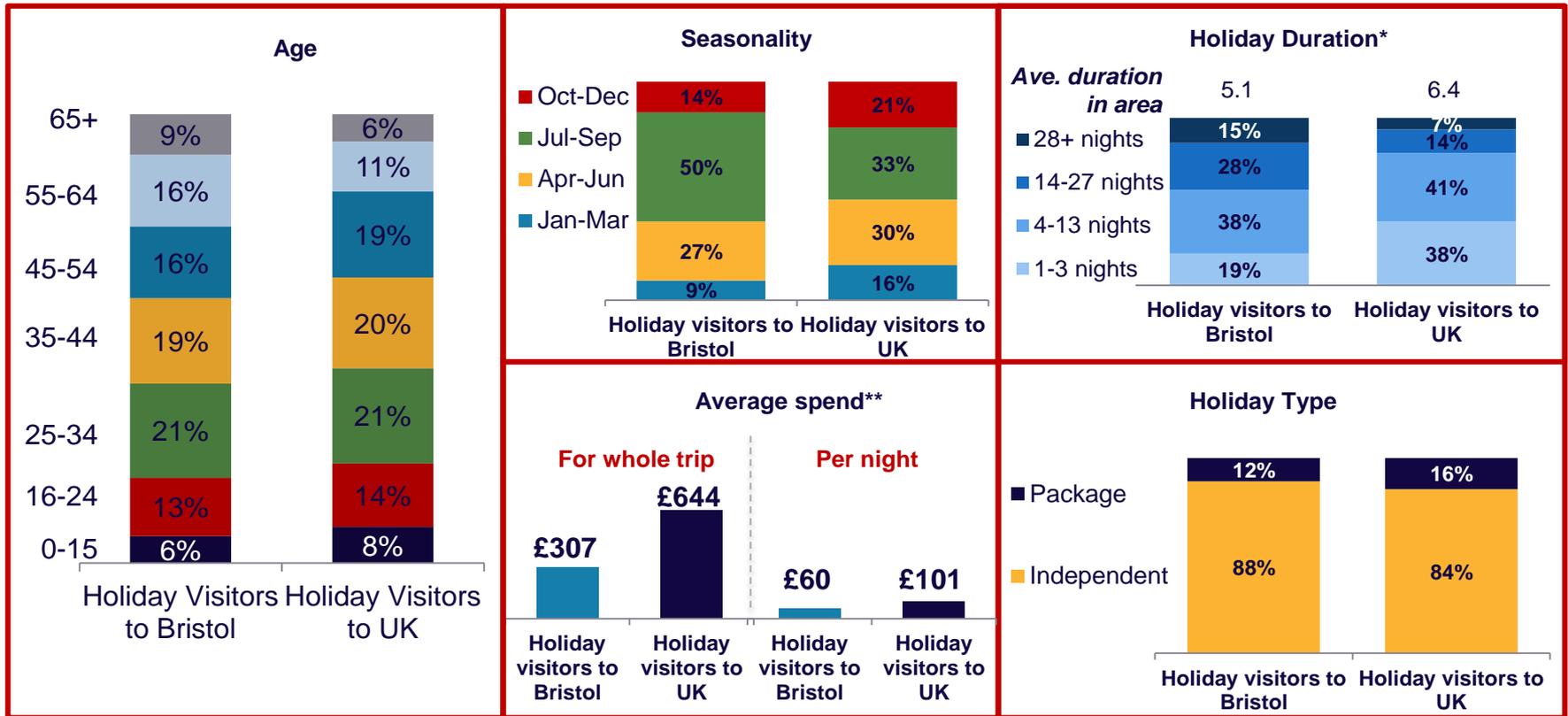
Trip purpose and source markets: All visitors and holiday visitors

Around 3 in 10 overseas visitors to Bristol are visiting for a holiday, lower than the UK average. Over a third are visiting to see friends or relatives, higher than the UK average. Holiday visitors are most likely to come from Germany and Spain and to visit Castles/historic houses, parks or gardens and countryside/villages. Nearly 2 in 5 visit the coast/beaches on their holiday.



Demographics and holiday characteristics: Holiday visitors

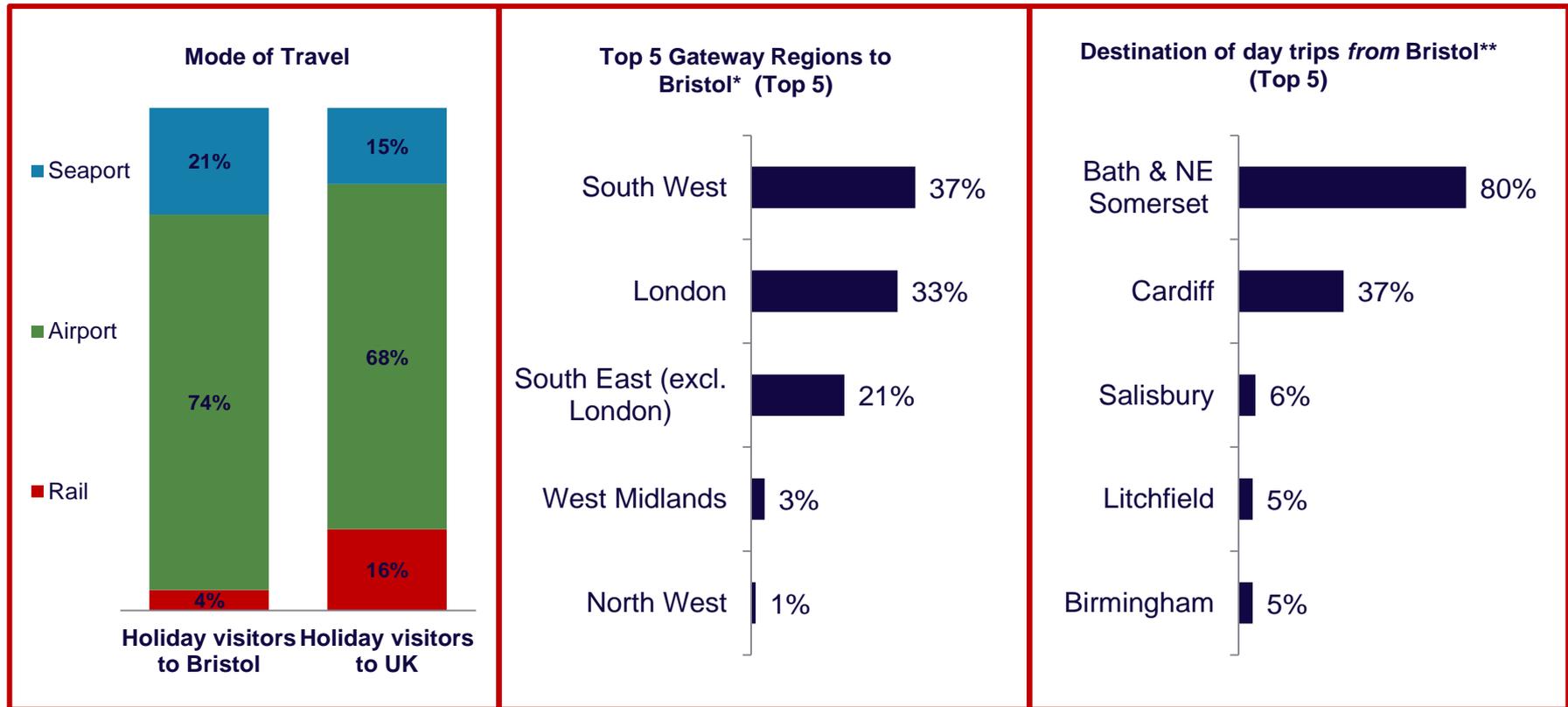
Overseas holiday visitors to Bristol tend to be of similar age groups to the UK average. Half visit in July to September, on average for 5.1 nights.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Three quarters of visitors to Bristol arrive in the UK by airport, 1 in 5 via seaport. The South West is the most popular gateway region, followed by London and the South East. Holiday visitors are most likely to visit Bath on a day-trip.



Headline stats: Overseas visits, spend and nights to Cambridge

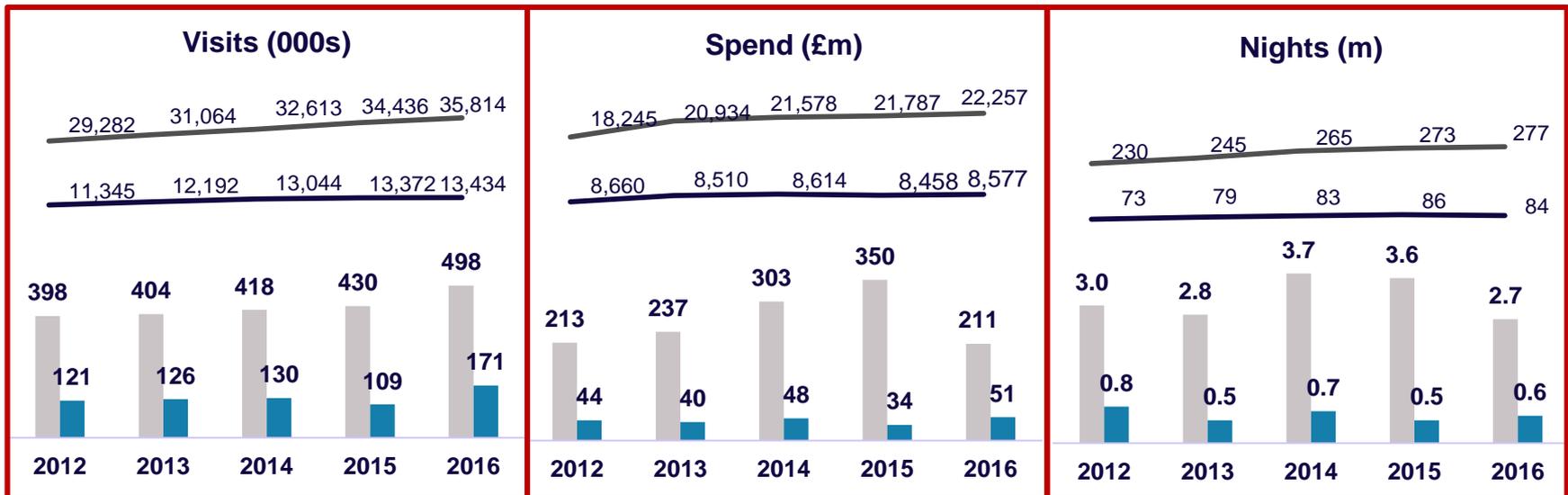
On average, Cambridge attracts 449,000 overseas visitors each year, 136,000 of whom are visiting for a holiday. Holiday visits and spend were higher in 2016 than in any of the five previous years.

Visits, Spend and Nights to Cambridge 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Cambridge Total	449	Cambridge Total	288	Cambridge Total	3.3
Cambridge Holiday	136	Cambridge Holiday	44	Cambridge Holiday	0.6

Visits, Spend and Nights 5 Year Trend

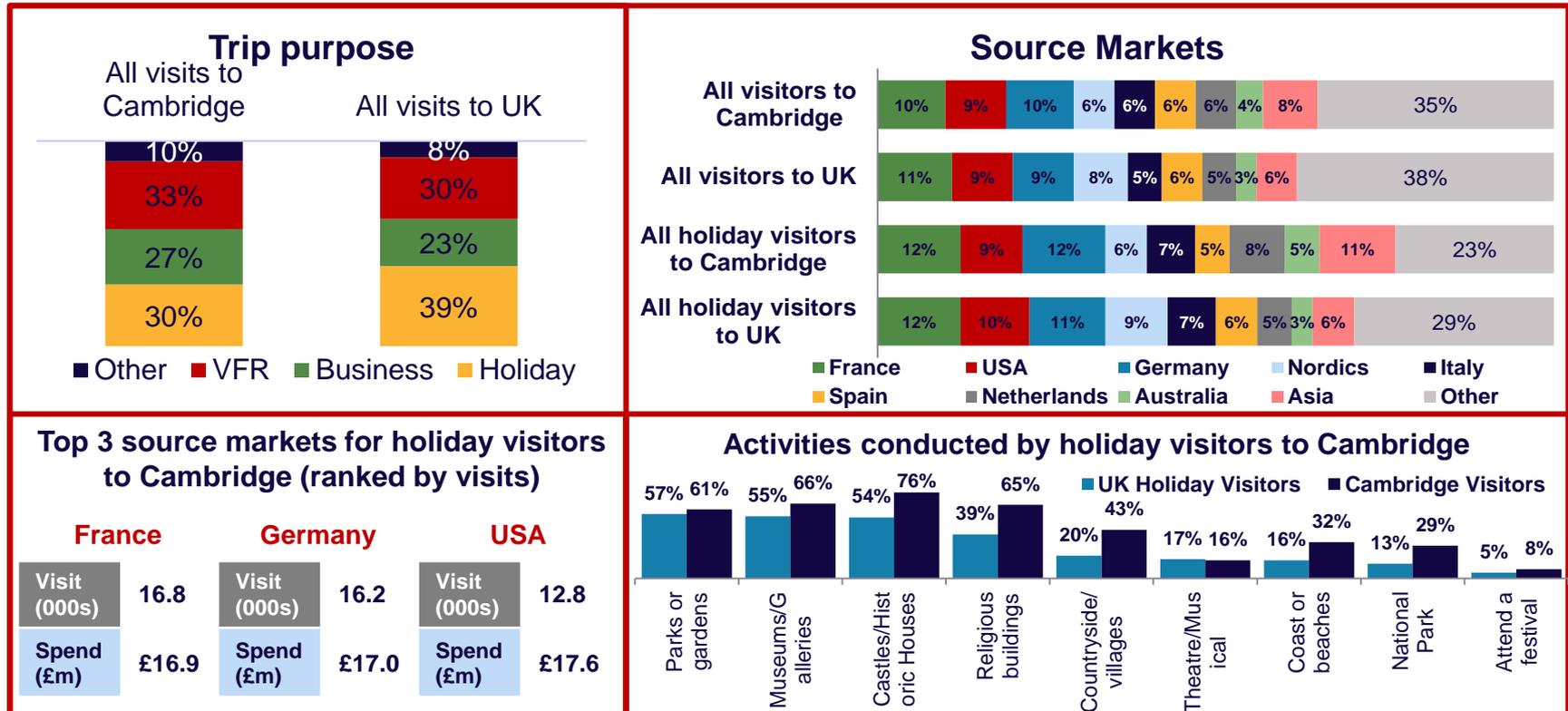
■ Cambridge Total ■ Cambridge Holiday
— UK Total — UK Holiday



Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

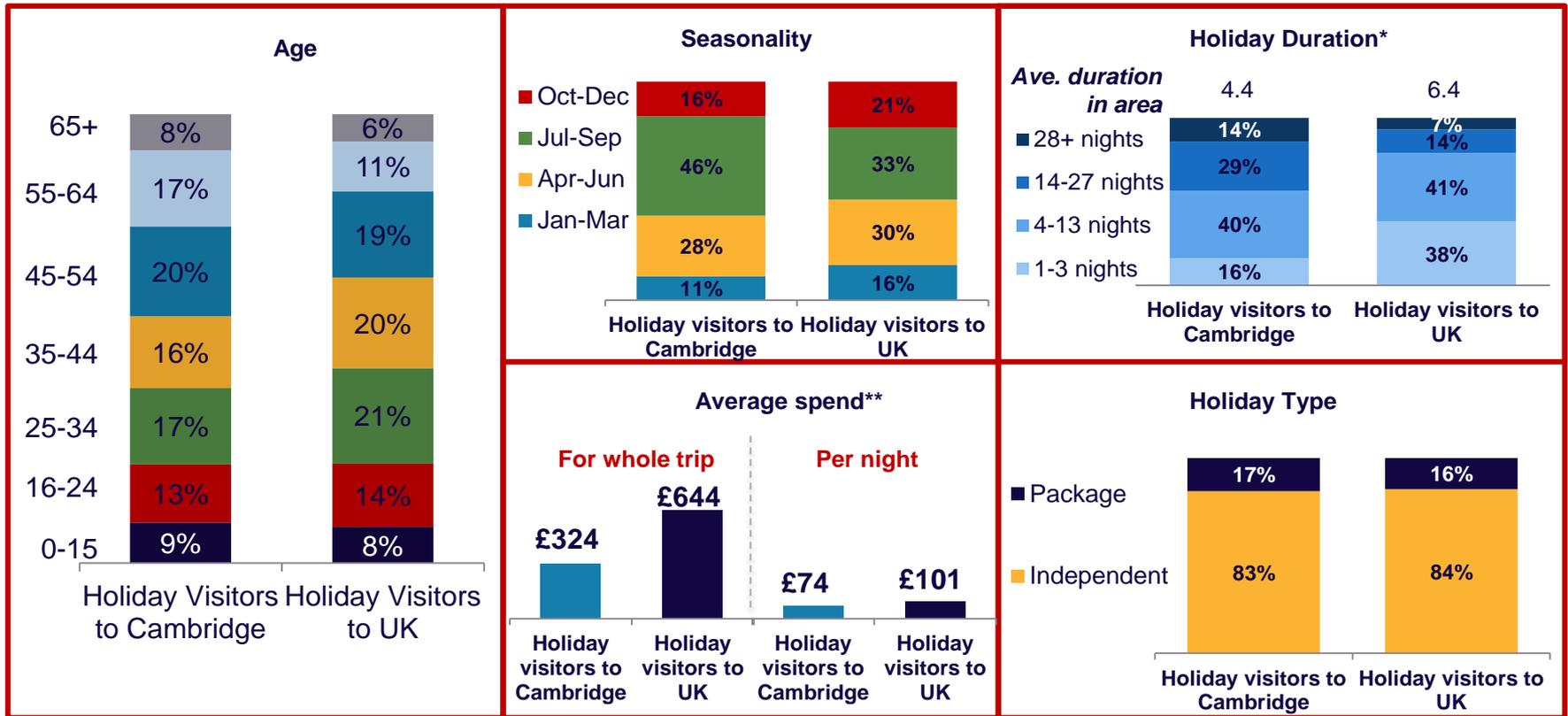
Trip purpose and source markets: All visitors and holiday visitors

Around 3 in 10 visitors to Cambridge visit for a holiday, similar proportions to those that visit for business or to visit friends or relatives. Holidays visitors are represented similarly to UK holidays on the whole, although are more likely to be visiting from Asia. Holiday visitors to Cambridge are significantly more likely than average to engage in cultural activities, visiting Castles or Historic Houses the most popular.



Demographics and holiday characteristics: Holiday visitors

Overseas holiday visitors to Cambridge tend to be older than holiday visitors to the UK in general. They are significantly more likely than average to be visiting in the summer months. On average they stay 4.4 nights.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Around 1 in 4 holiday visitors to Cambridge use a seaport as a gateway to the UK and 3 in 5 via airport. London is the most likely gateway region followed by the South East.



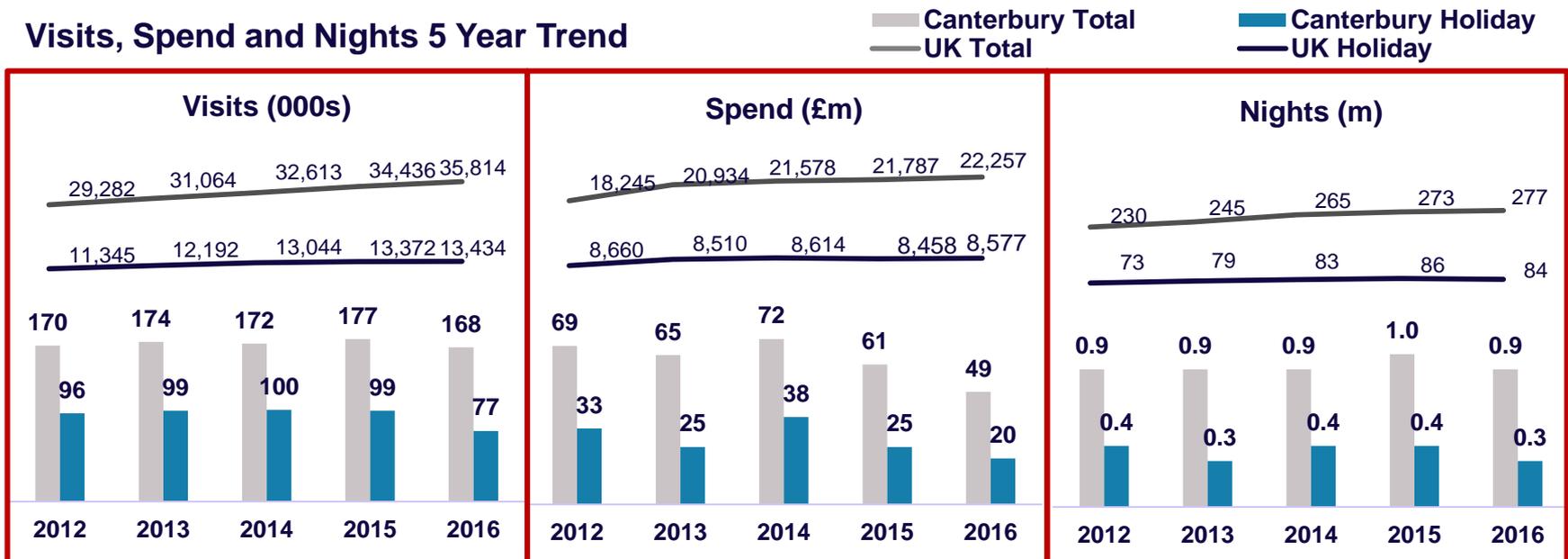
Headline stats: Overseas visits, spend and nights to Canterbury

Canterbury attracts 172,000 overseas visits annually, 92,000 of which are for a holiday.

Visits, Spend and Nights to Canterbury 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Canterbury Total	172	Canterbury Total	61	Canterbury Total	1.0
Canterbury Holiday	92	Canterbury Holiday	28	Canterbury Holiday	0.4

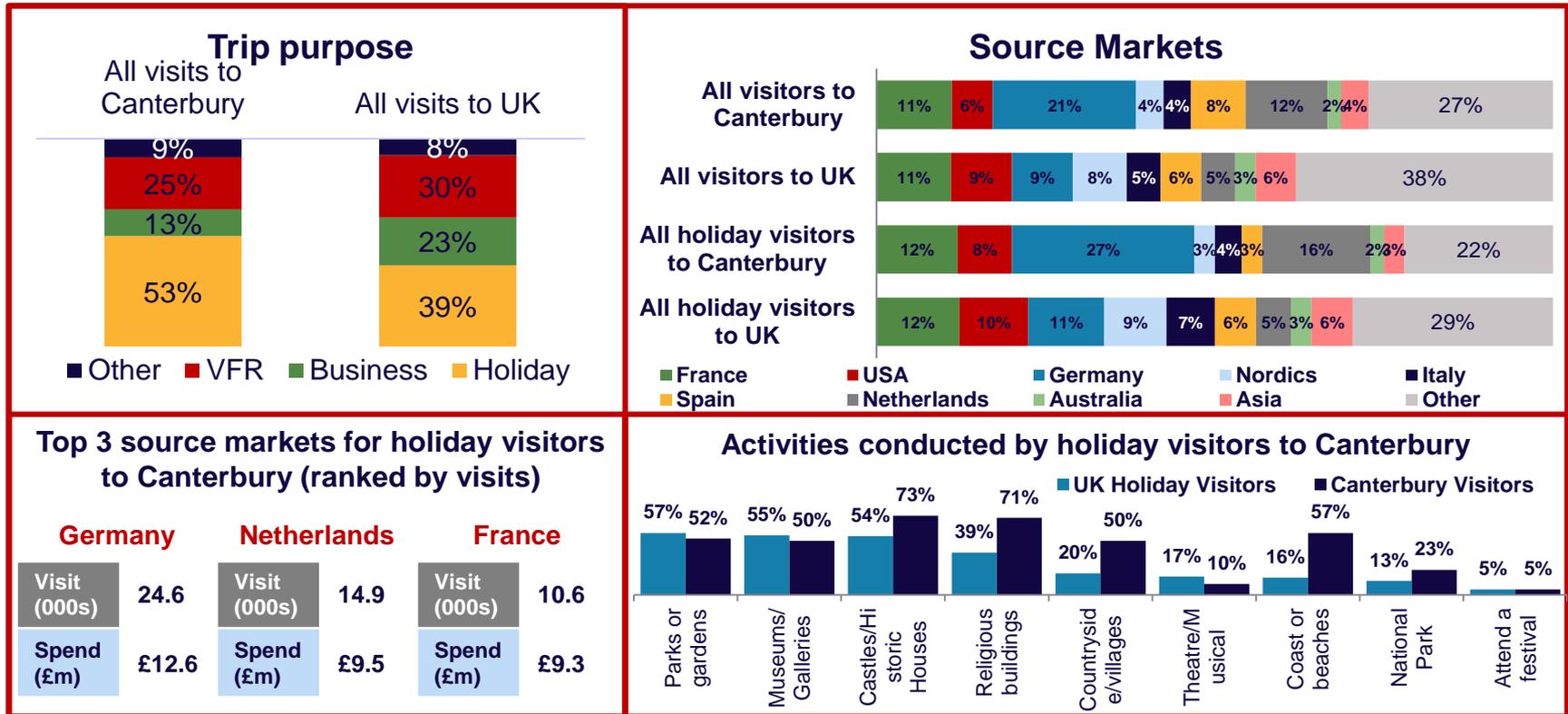
Visits, Spend and Nights 5 Year Trend



Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

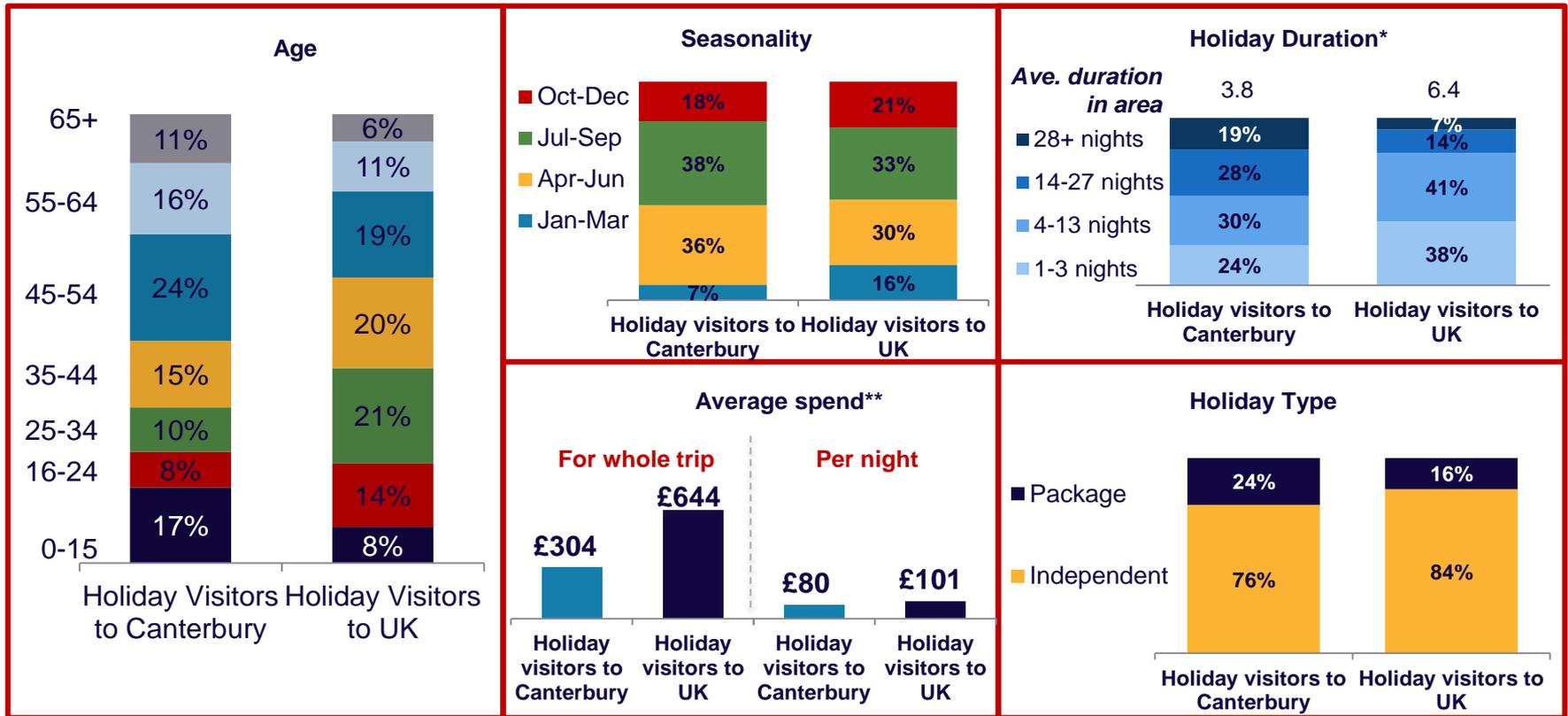
Trip purpose and source markets: All visitors and holiday visitors

Over half of visitors to Canterbury are visiting for holiday purposes, higher than the UK average. The largest proportion of holiday visitors are from Germany, significantly more than the UK average. Holiday visitors to Canterbury are significantly more likely than average to visit castles/ historic houses, religious buildings, the countryside and the coast.



Demographics and holiday characteristics: Holiday visitors

Holiday visitors to Canterbury tend to be older than the UK average, and more likely to be staying in the peak summer season on a longer package holiday. They are also more likely than average to be visiting between April and June. On average holiday visitors to Canterbury spend 3.8 nights in the City.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

The vast majority of Holiday visitors to Canterbury arrive via seaport, and via a South East gateway. Around a quarter of holiday visitors arrive via a London gateway.



Headline stats: Overseas visits, spend and nights to Eastbourne

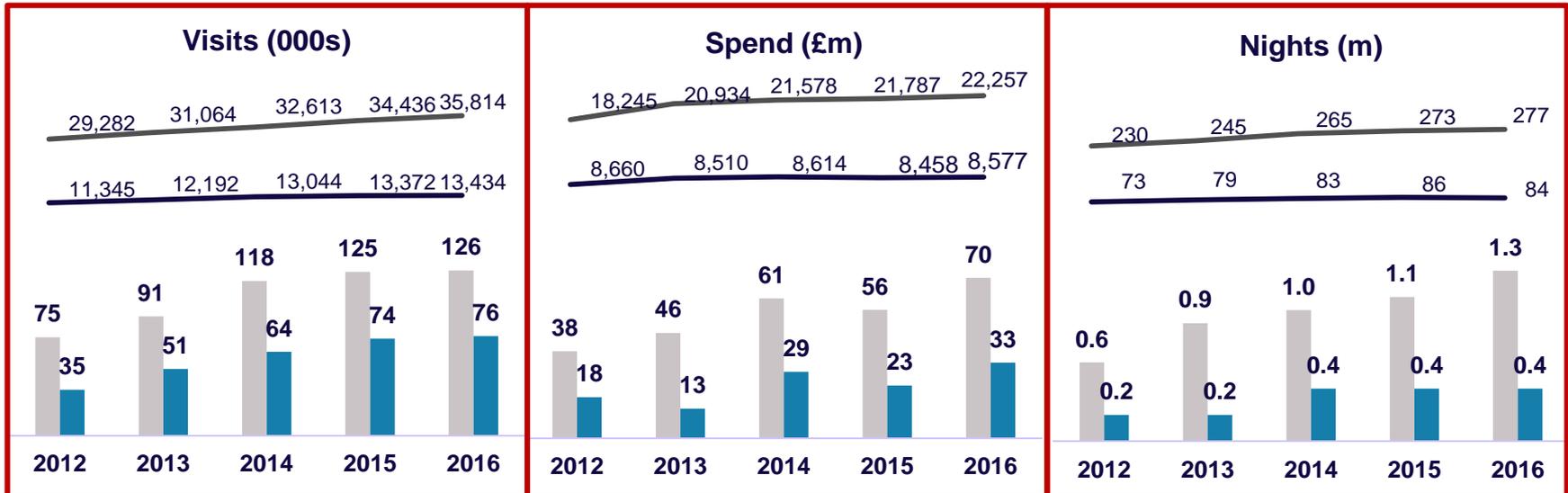
123,000 visits are recorded annually to Eastbourne, over half of which are for a holiday. Holiday visits have increased steadily in recent years.

Visits, Spend and Nights to Eastbourne 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Eastbourne Total	123	Eastbourne Total	62	Eastbourne Total	1.2
Eastbourne Holiday	72	Eastbourne Holiday	28	Eastbourne Holiday	0.4

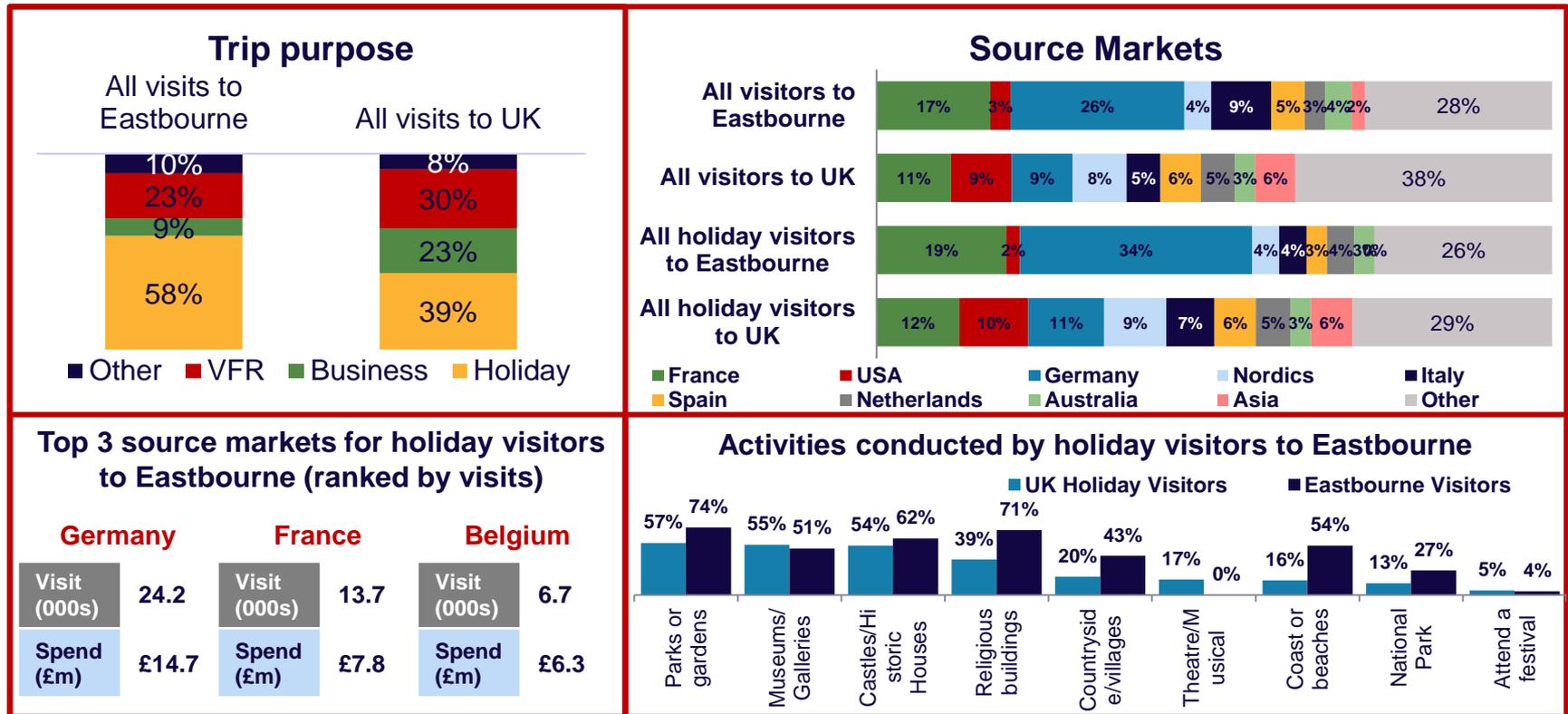
Visits, Spend and Nights 5 Year Trend

■ Eastbourne Total ■ Eastbourne Holiday
— UK Total — UK Holiday



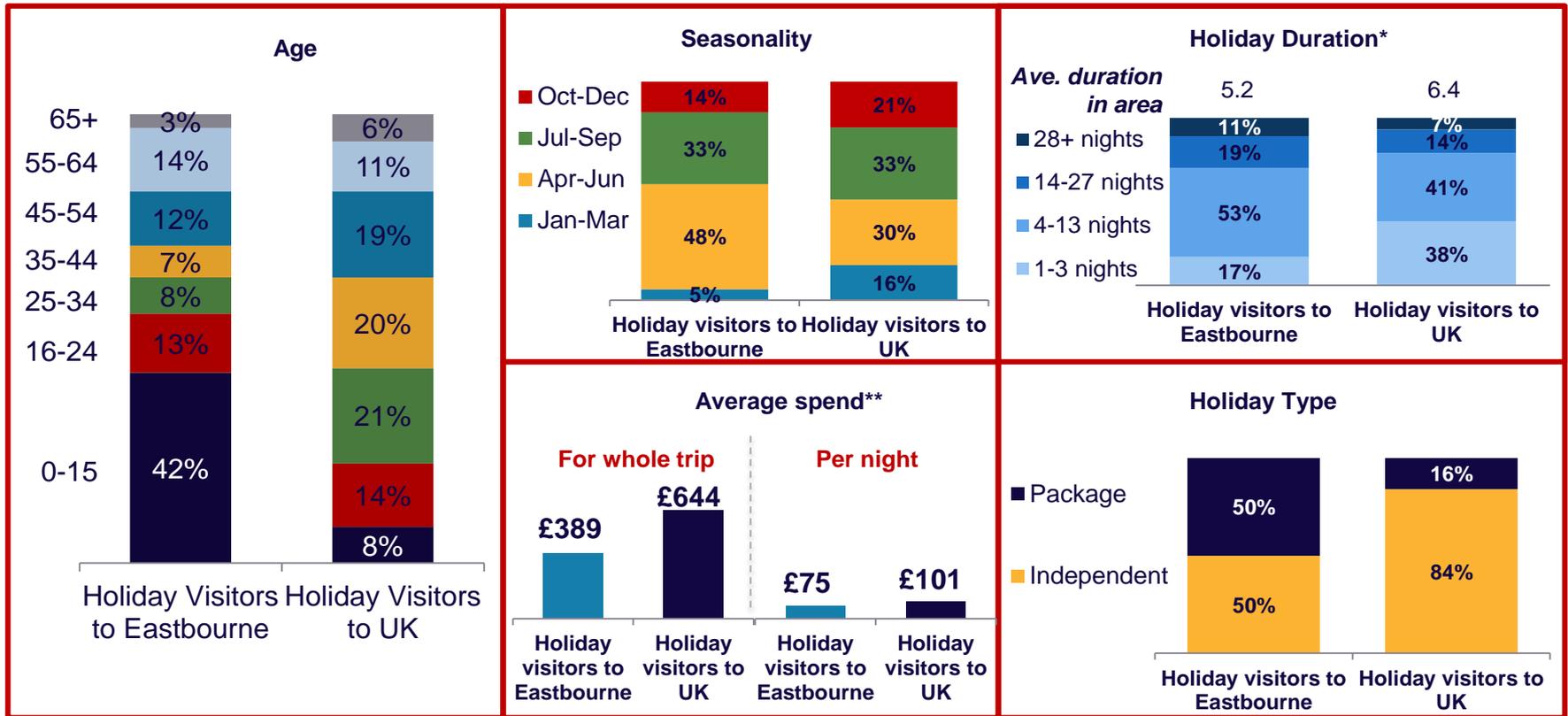
Trip purpose and source markets: All visitors and holiday visitors

The majority of visits to Eastbourne are solely for the purpose of a holiday and unsurprisingly, these visitors are more likely than the UK holiday average to visit the coast or beaches. The top source market for holiday visitors to Eastbourne is Germany, followed by France and Belgium, all of whom index significantly higher than the UK average.



Demographics and holiday characteristics: Holiday visitors

A significant proportion of holiday visitors to Eastbourne are children, aged 0-15. Holiday visitors to Eastbourne are more likely than the UK holiday average to visit between April and June on a package holiday. The average duration stayed in the area is 5.2 nights.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Holiday visitors to Eastbourne are more likely than the UK holiday average to arrive via seaport, with 3 in 5 doing so. The top gateway region to Eastbourne is the South East.



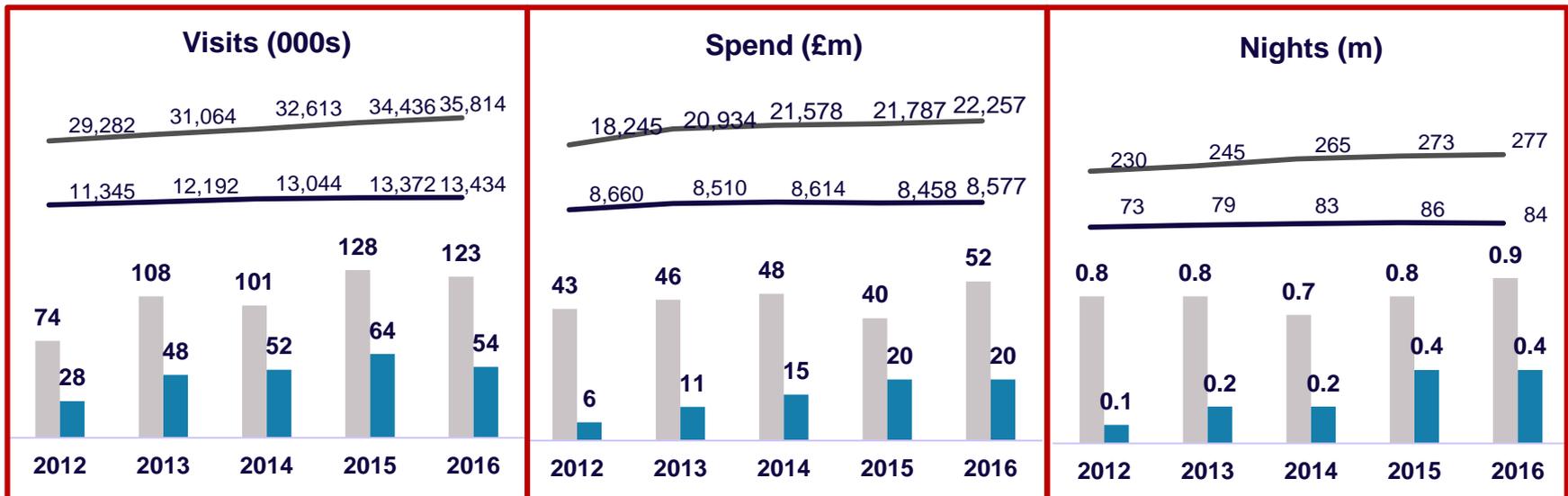
Headline stats: Overseas visits, spend and nights to Exeter

On average Exeter attracts 117,000 overseas visitors annually, 57,000 of which are visiting for a holiday.

Visits, Spend and Nights to Exeter 3 year average for 2014-16

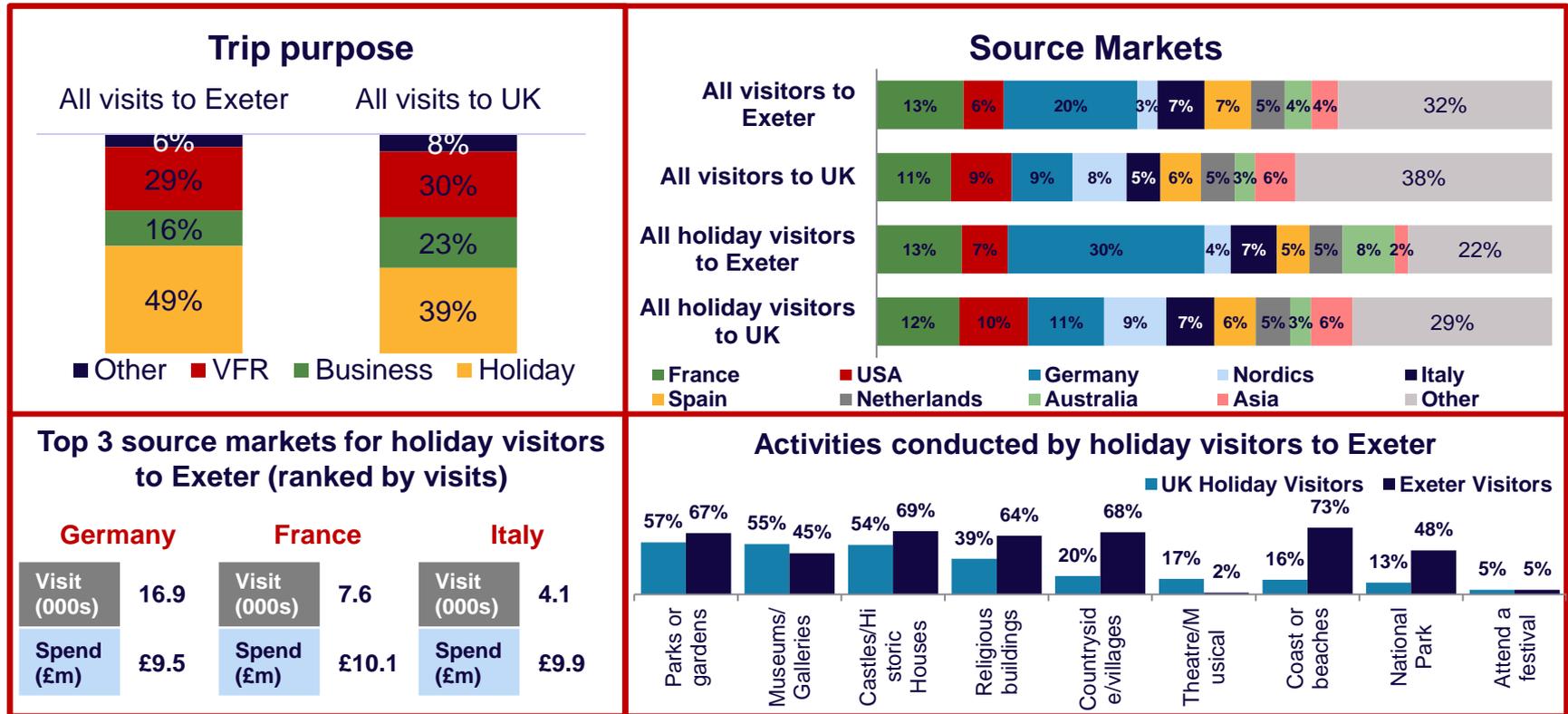
Visits (000s)		Spend (£m)		Nights (m)	
Exeter Total	117	Exeter Total	47	Exeter Total	0.8
Exeter Holiday	57	Exeter Holiday	18	Exeter Holiday	0.3

Visits, Spend and Nights 5 Year Trend



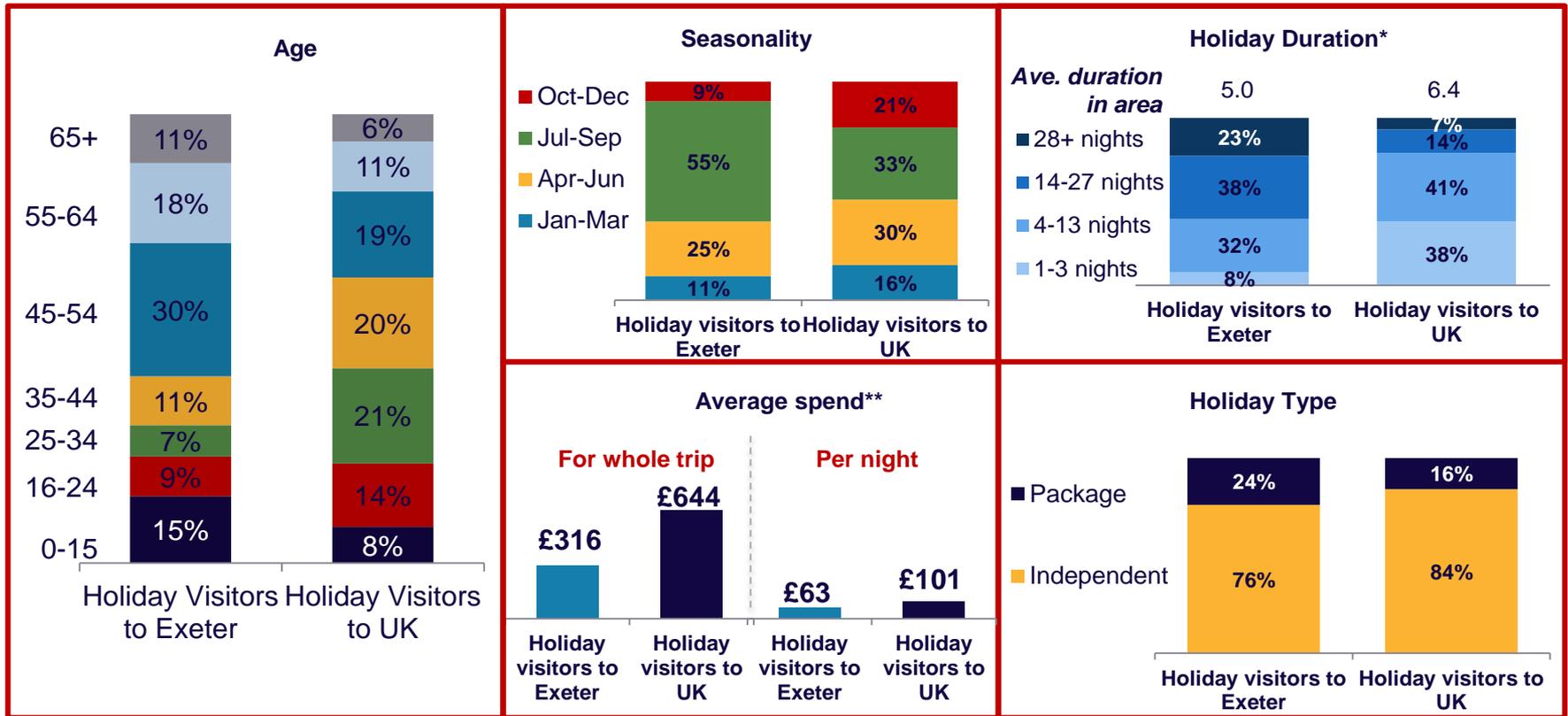
Trip purpose and source markets: All visitors and holiday visitors

Nearly half of visitors to Exeter are visiting for a holiday, higher than the UK average. Germany is the market most likely to visit Exeter, making up 30% of their total overseas visits



Demographics and holiday characteristics: Holiday visitors

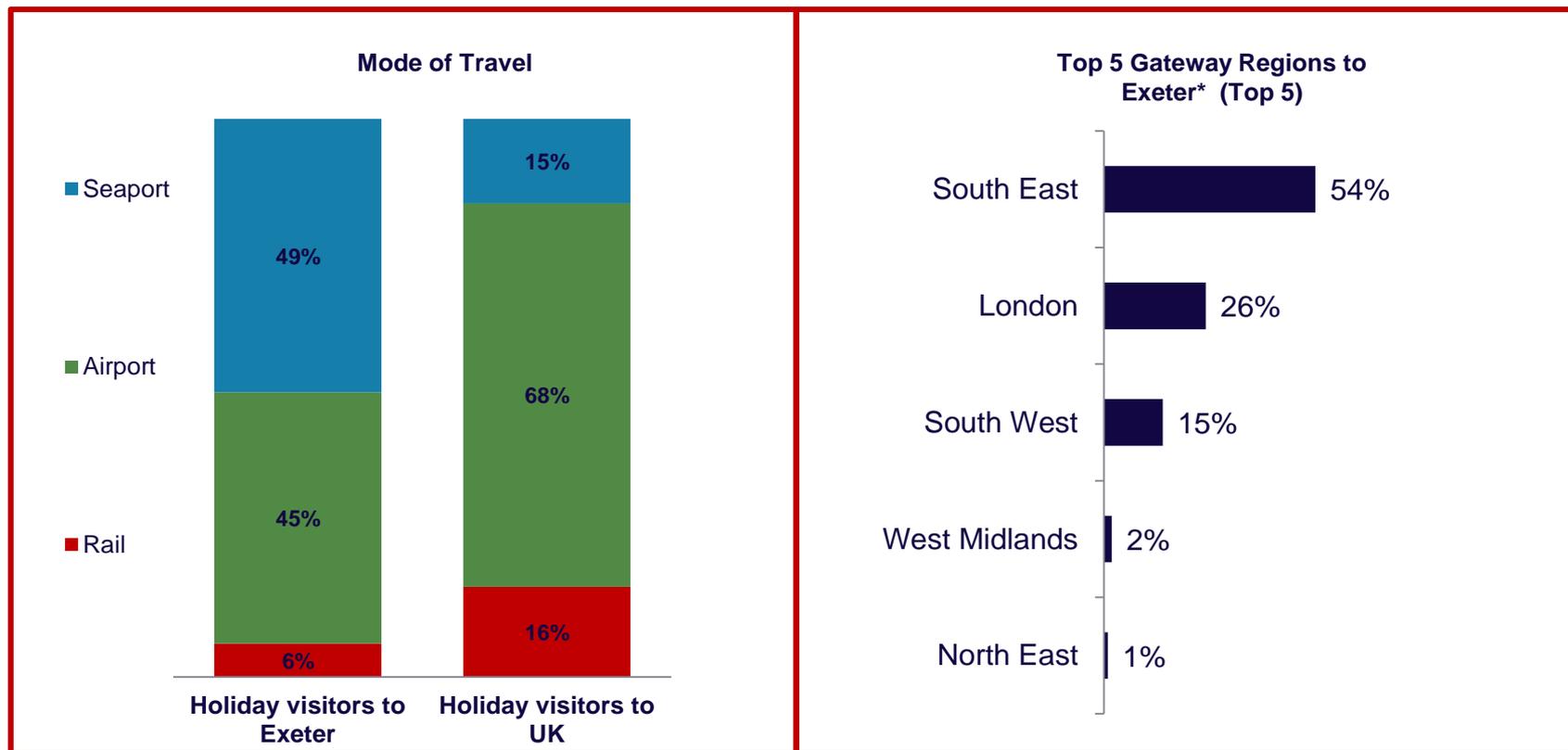
Holiday visitors to Exeter tend to be older than holiday visitors to the UK in general, 59% aged 45 and over compared to 36%. Holiday visitors are most likely to visit between July and September, and to stay for 5.0 nights.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

49% of overseas visitors to Exeter arrive in the UK via seaport, significantly higher than holiday visitors to the UK in general. The main gateway regions are the South East and London.



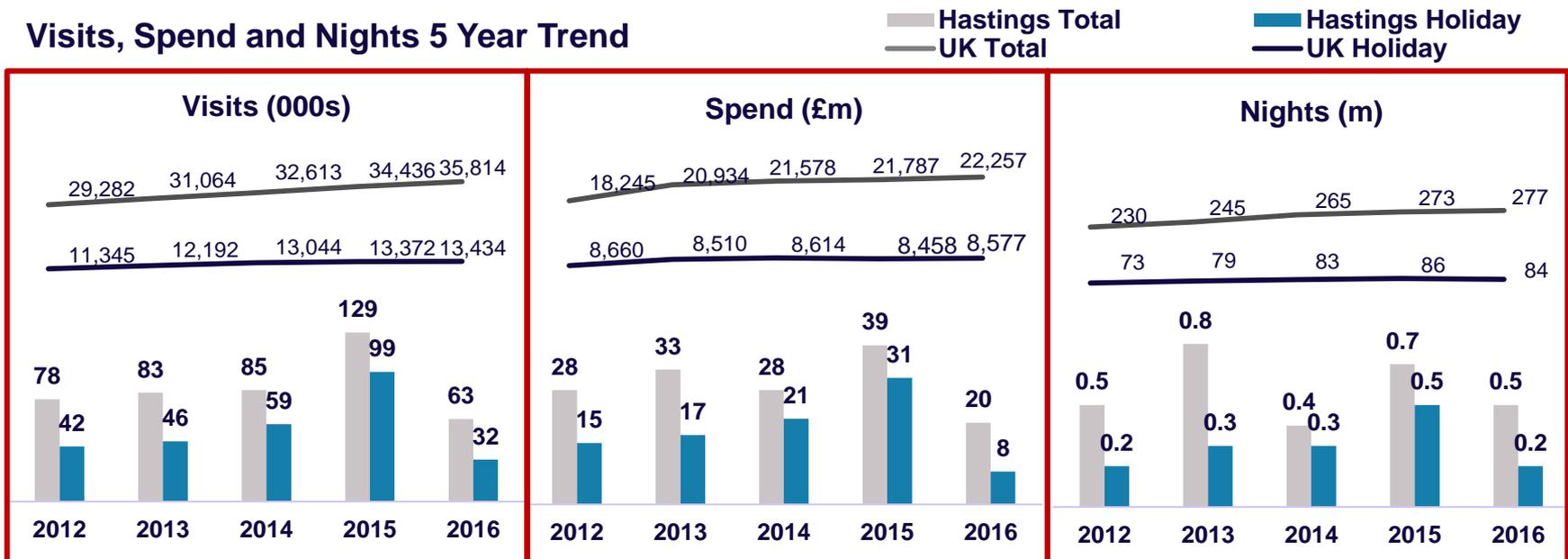
Headline stats: Overseas visits, spend and nights to Hastings

Hastings attracts an average of 92,000 visitors a year, 63,000 of whom are visiting for a holiday

Visits, Spend and Nights to Hastings 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Hastings Total	92	Hastings Total	29	Hastings Total	0.5
Hastings Holiday	63	Hastings Holiday	20	Hastings Holiday	0.3

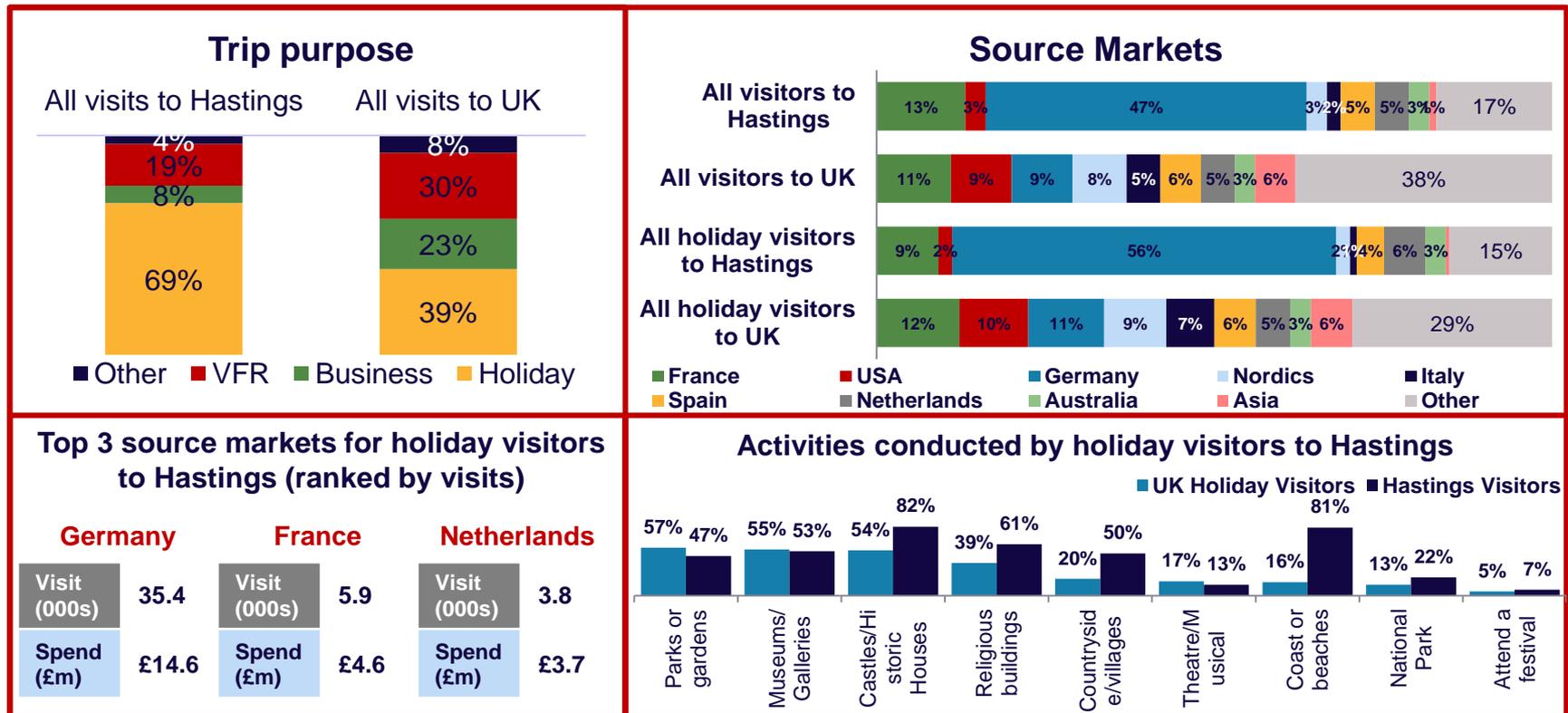
Visits, Spend and Nights 5 Year Trend



Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

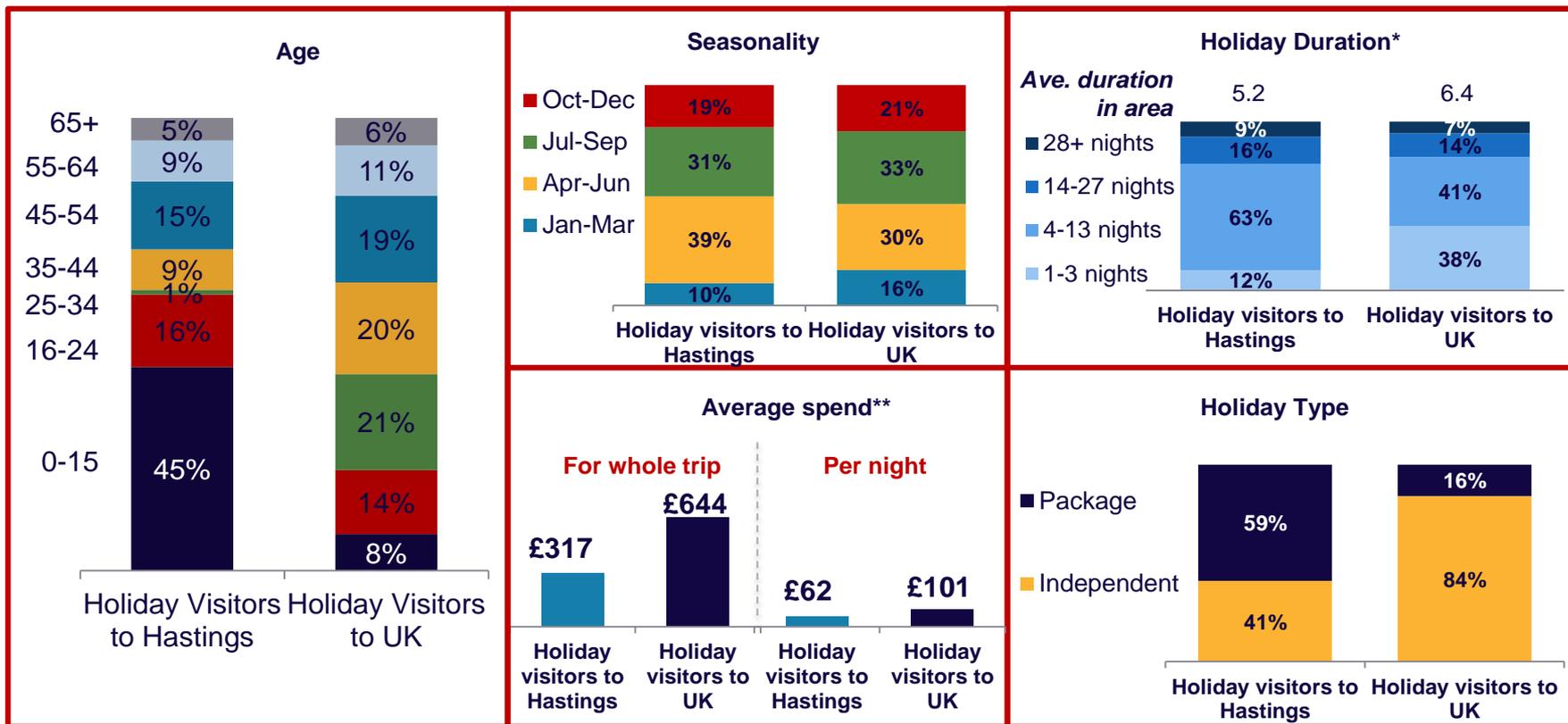
Trip purpose and source markets: All visitors and holiday visitors

The vast majority of visits to Hastings are for holiday purposes, significantly higher than the UK average. Germany is the top source market amongst holiday visitors, comprising of 56% of all holiday visitors. Hastings holiday visitors are more likely than the UK average to visit coasts or beaches.



Demographics and holiday characteristics: Holiday visitors

Holiday visitors to Hastings are more likely than the UK average to fall in the younger age brackets 0-15 and 16-24, visiting in the months of April-June on a package holiday. On average they stay in Hastings for 5.2 nights.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Due to its coastal location, three quarters of holiday visitors to Hastings arrive by seaport, significantly higher than the UK average. The majority of holiday visitors to Hastings arrive via a South East gateway.



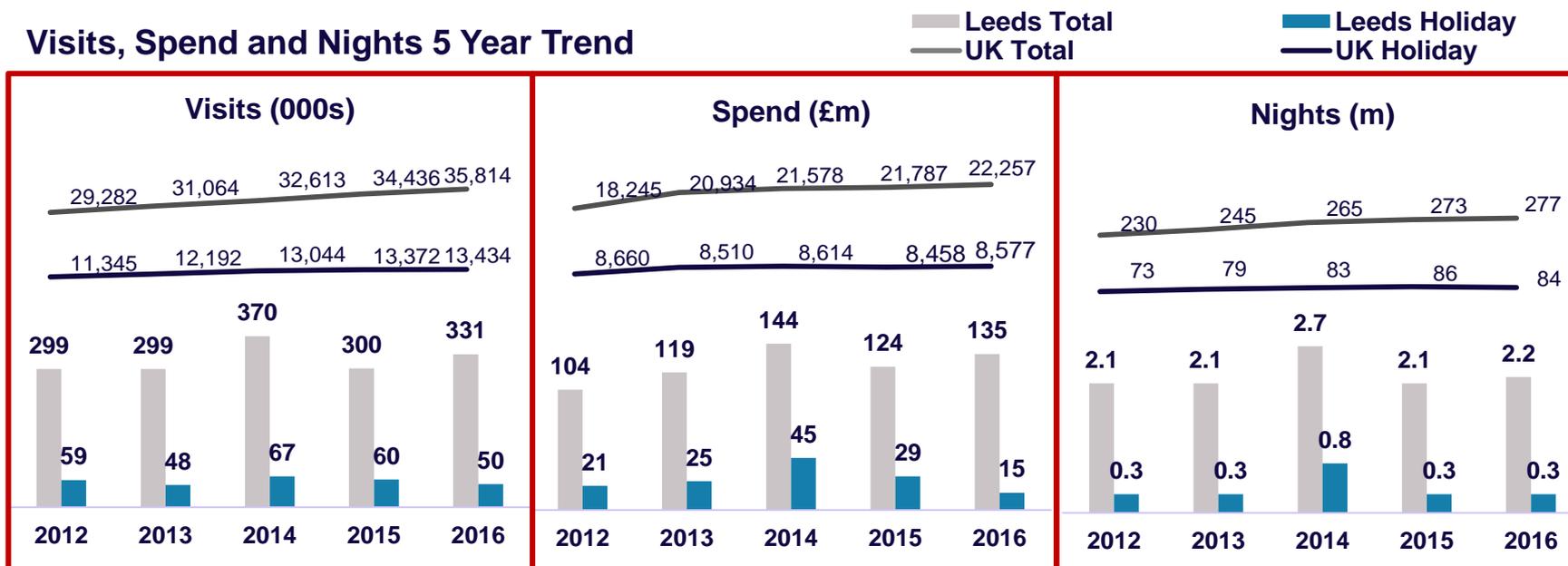
Headline stats: Overseas visits, spend and nights to Leeds

Leeds attracts 334,000 overseas visits annually, 59 thousand of which are for a holiday.

Visits, Spend and Nights to Leeds 3 year average for 2014-16

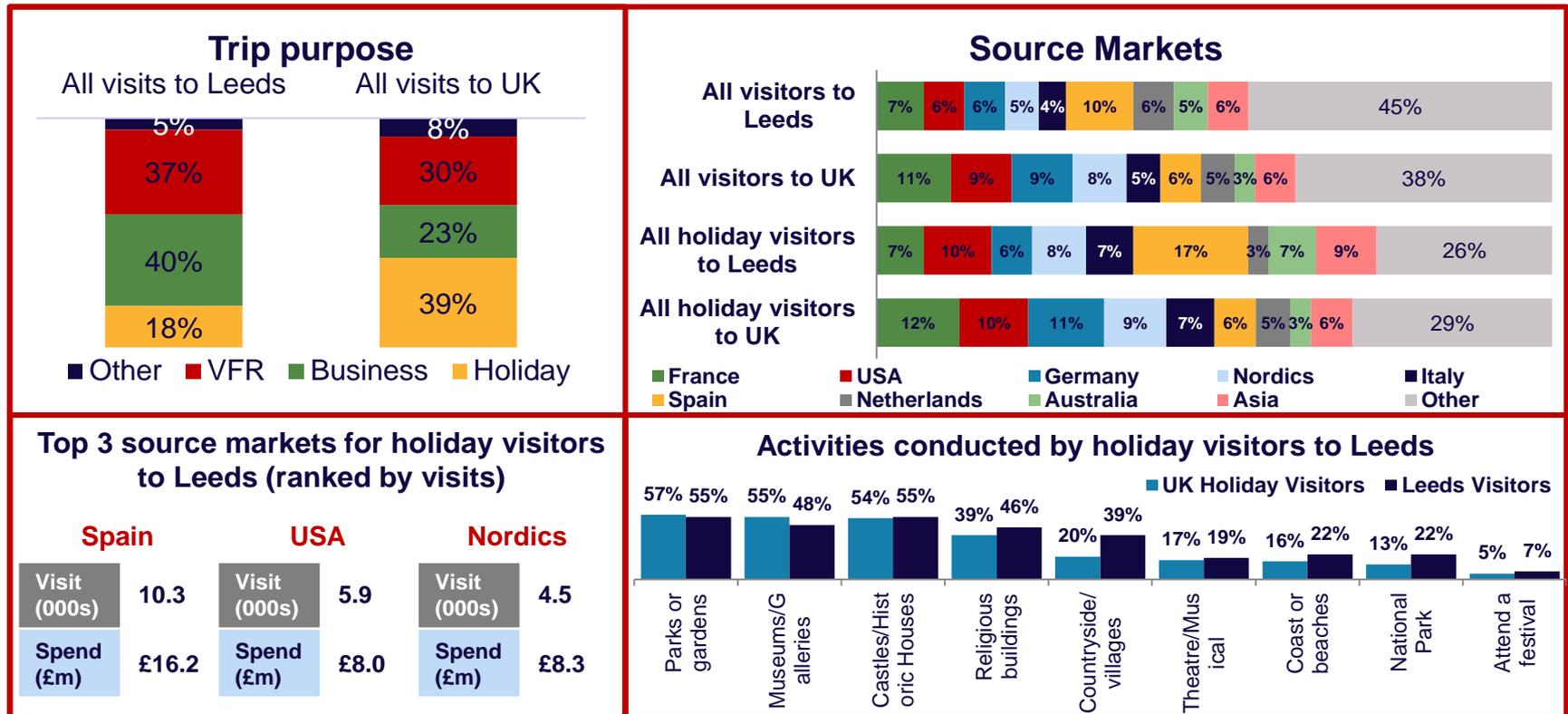
Visits (000s)		Spend (£m)		Nights (m)	
Leeds Total	334	Leeds Total	134	Leeds Total	2.3
Leeds Holiday	59	Leeds Holiday	30	Leeds Holiday	0.5

Visits, Spend and Nights 5 Year Trend



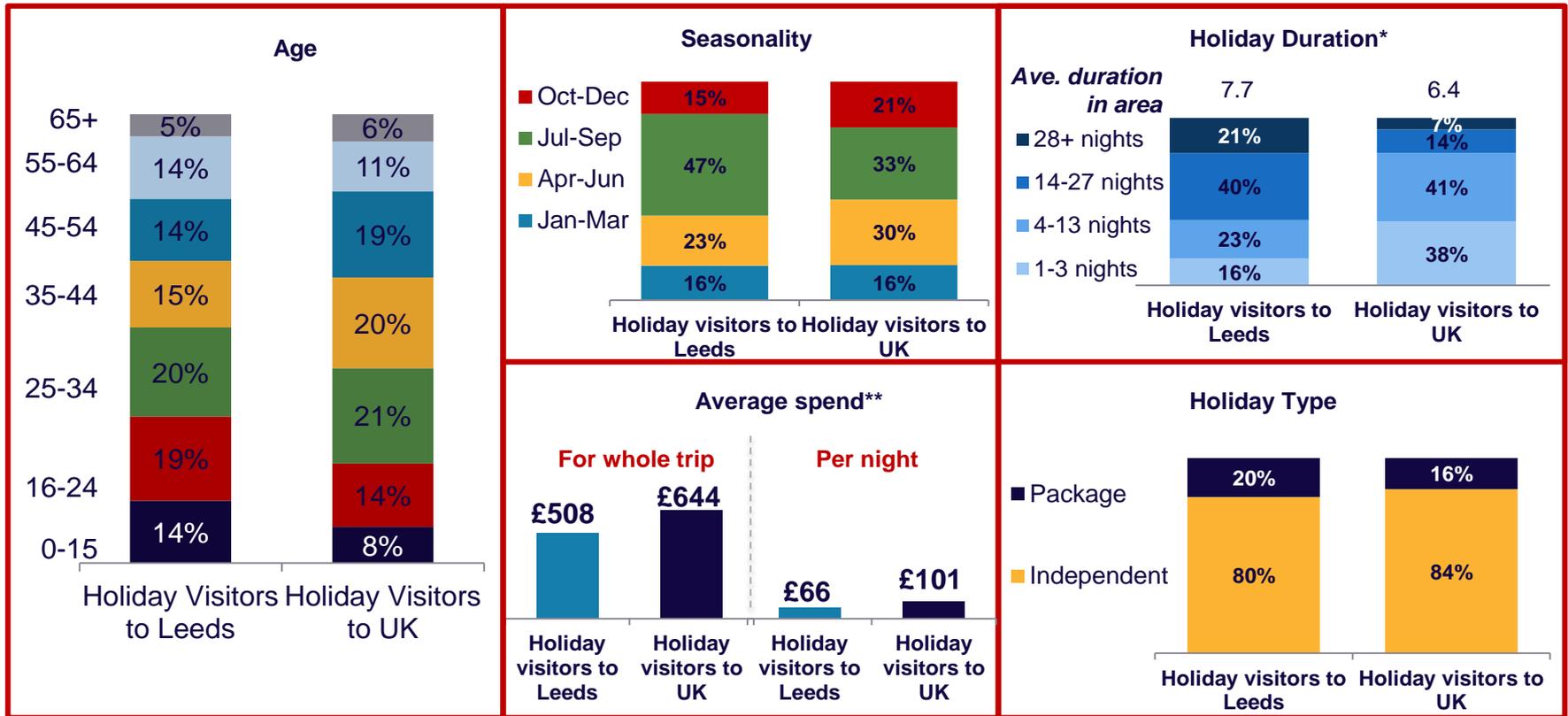
Trip purpose and source markets: All visitors and holiday visitors

A higher proportion of Leeds vs all visits to UK are business trips or for the purpose of visiting friends and relatives. Holiday visits make up only 1 in 5 visits, compared to 39% nationally. Leeds holiday visitors tend to be as likely as the UK average to engage in cultural activities, but are more likely than UK average to visit the countryside/villages.



Demographics and holiday characteristics: Holiday visitors

Holiday visitors to Leeds are more likely than the UK average to be aged 16-24 and visiting on an independent holiday in the summer season of July-September. The average duration of a holiday in Leeds is 7.7 nights., although this is driven by the strong rise in visits in 2014.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

The majority of Leeds holiday visitors arrive via airport in London gateways, closely followed by Yorkshire and Northwest gateways.



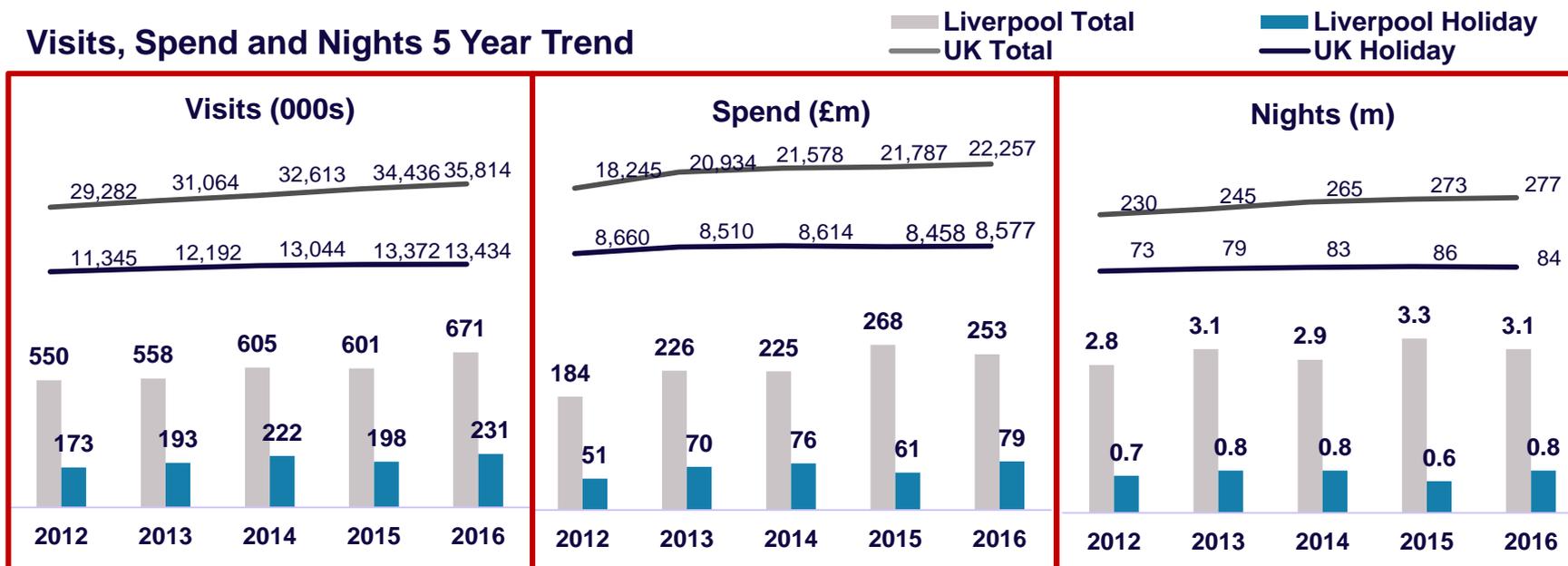
Headline stats: Overseas visits, spend and nights to Liverpool

Liverpool attracts 625,000 visits annually, 217,000 of which are holiday visits. 2016 attracted the highest number of holiday visitors to Liverpool in 5 years. Holiday visitors also recorded the highest spend in Liverpool in 2016

Visits, Spend and Nights to Liverpool 3 year average for 2014-16

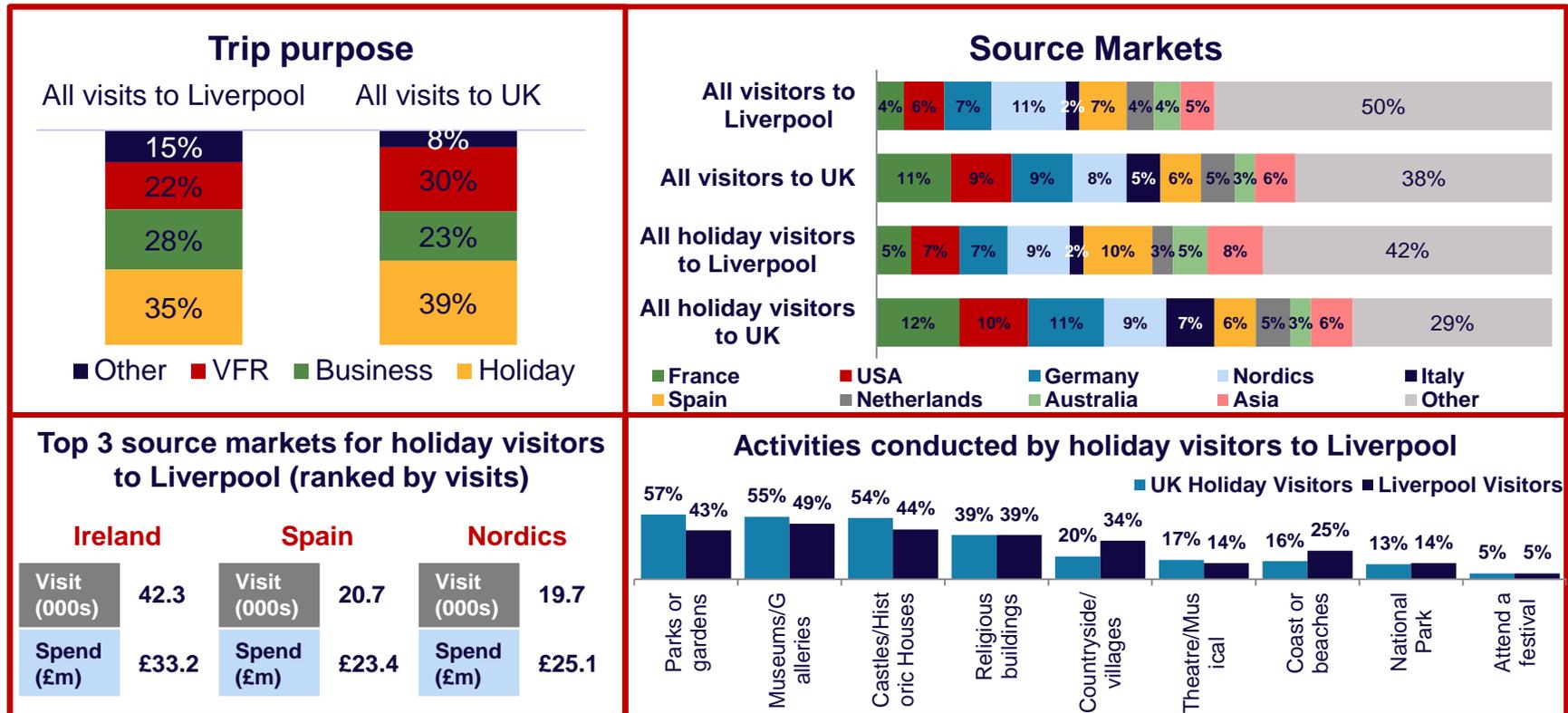
Visits (000s)		Spend (£m)		Nights (m)	
Liverpool Total	625	Liverpool Total	249	Liverpool Total	3.1
Liverpool Holiday	217	Liverpool Holiday	72	Liverpool Holiday	0.7

Visits, Spend and Nights 5 Year Trend



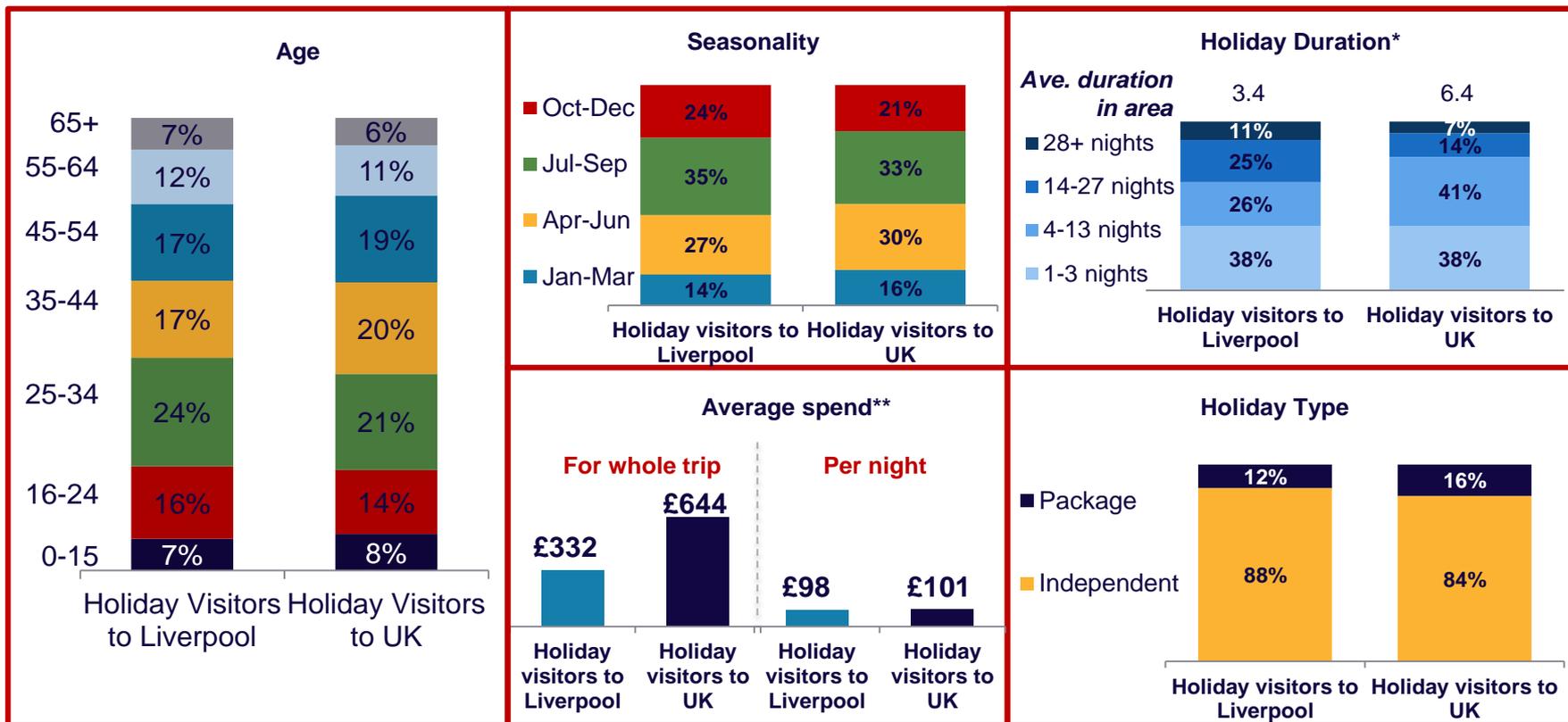
Trip purpose and source markets: All visitors and holiday visitors

Visits to Liverpool are most likely to be for a holiday but are more likely than the UK average to be for business. The top source market to Liverpool is Ireland, followed by Spain. Holiday visitors to Liverpool are more likely than average to visit countryside/village and coasts or beaches.



Demographics and holiday characteristics: Holiday visitors

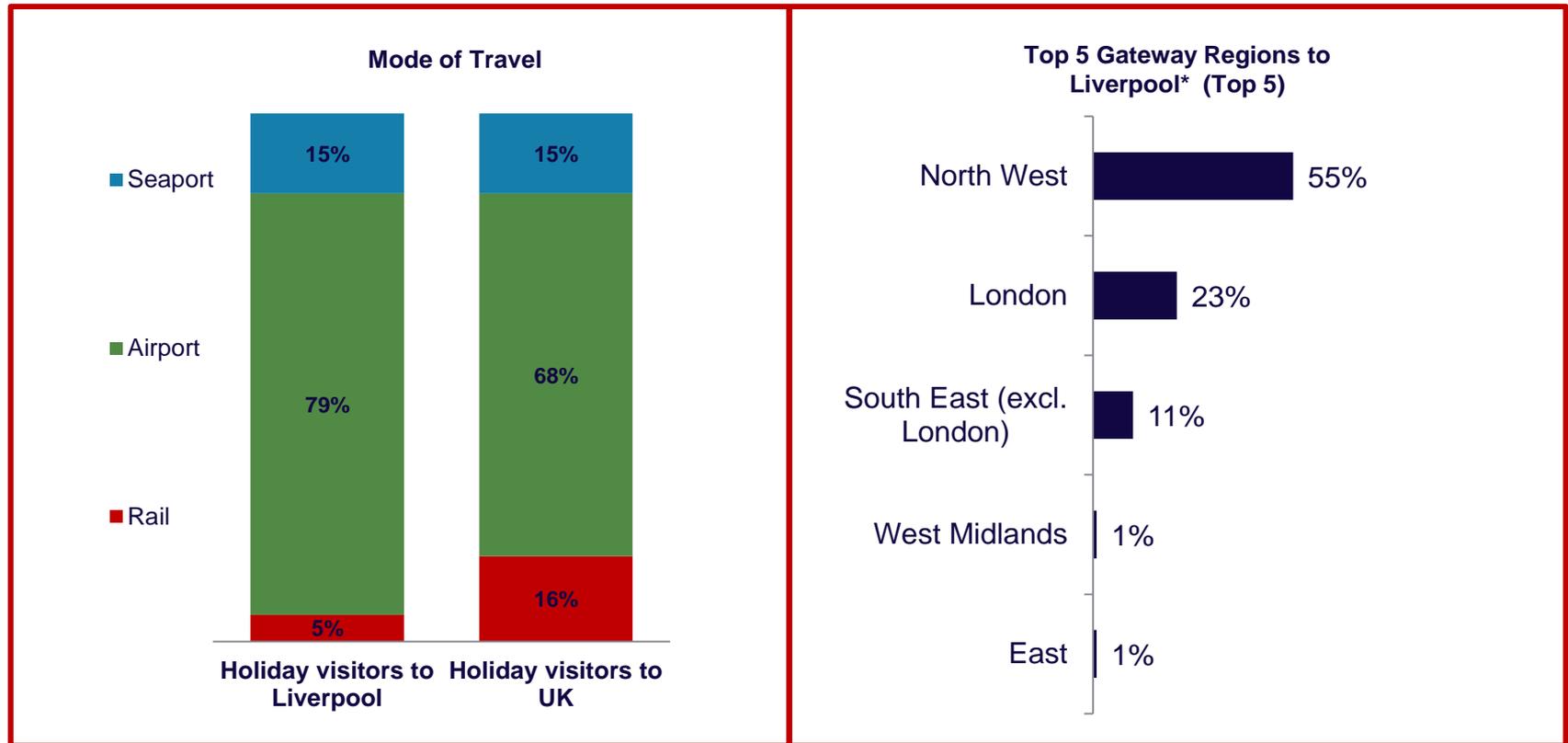
Holiday visitors to Liverpool are marginally younger than the UK average and are more likely to visit in the peak summer season for a shorter number of nights. Holiday visitors' average spend per night is consistent with the UK holiday visitor average, although due to a shorter than average stay, spend less overall.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Holiday visitors to Liverpool typically arrived in the UK by airport via a North West gateway. Just under a quarter of holiday visitors used a London gateway to arrive in the UK.



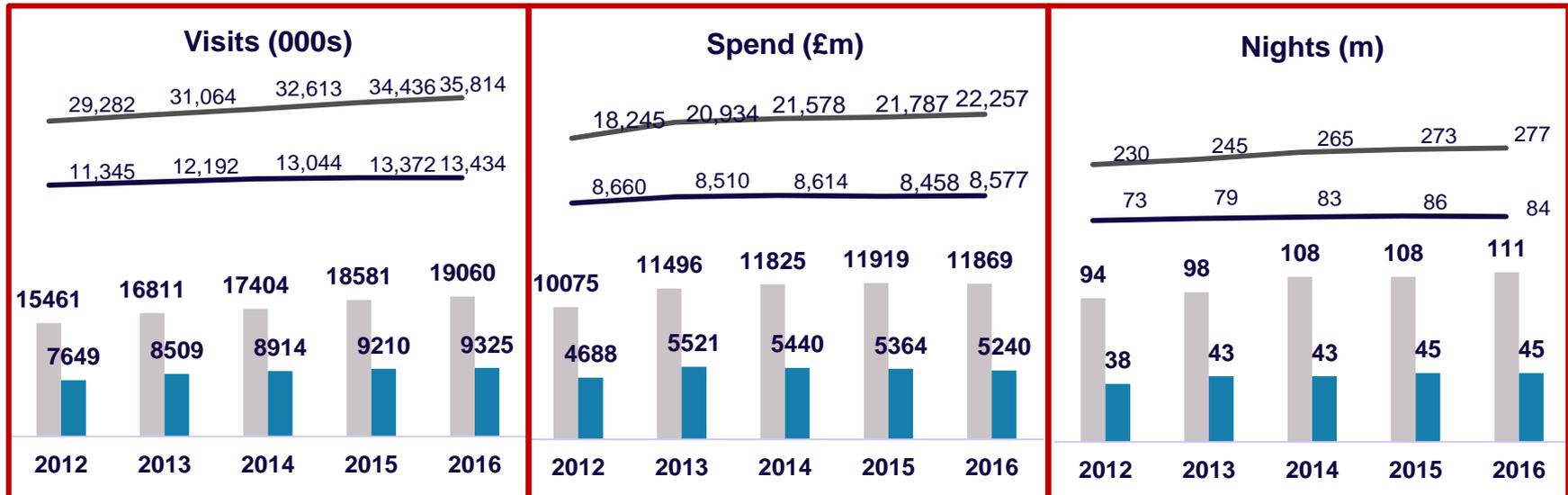
Headline stats: Overseas visits, spend and nights to London

London attracts on average of 18.3 million visits annually, around half of which are holiday visits. Total and holiday visits to London have been steadily increasing since 2012. Overall spend has remained fairly constant.

Visits, Spend and Nights to London 3 year average for 2014-16

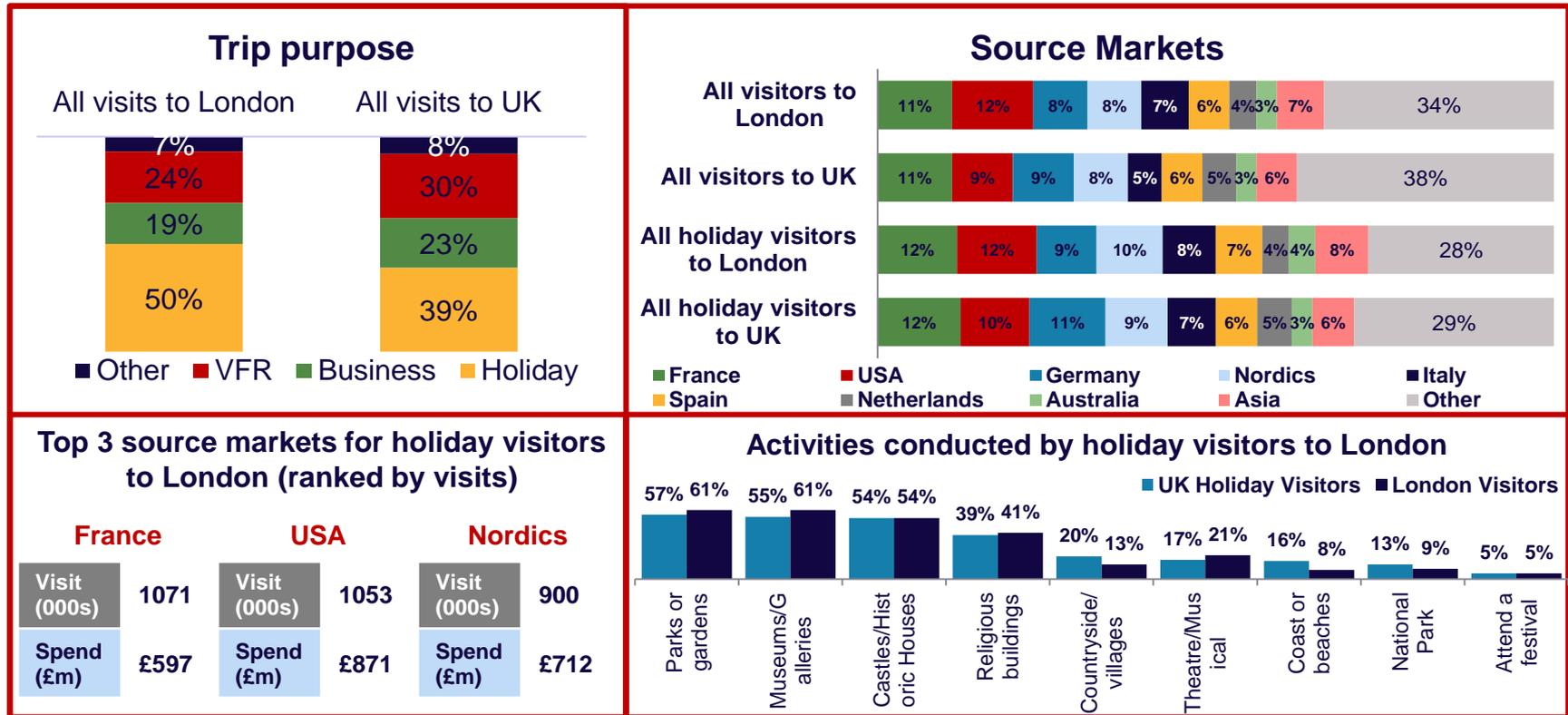
Visits (000s)		Spend (£m)		Nights (m)	
London Total	18,348	London Total	11,871	London Total	109
London Holiday	9,150	London Holiday	5,348	London Holiday	44

Visits, Spend and Nights 5 Year Trend



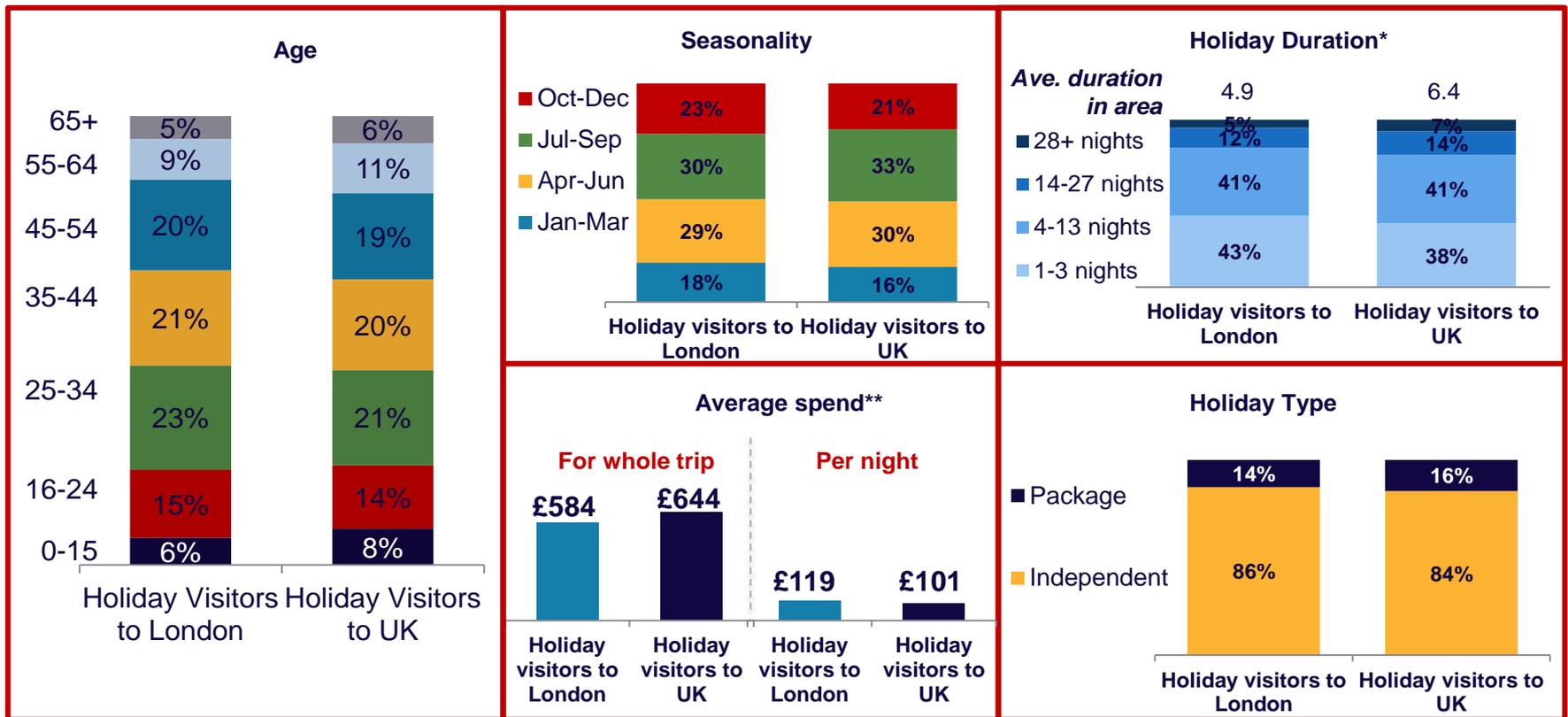
Trip purpose and source markets: All visitors and holiday visitors

Half of all visits to London are for a holiday, with visitors coming from a range of source markets. Holiday visitors to London are more likely than the UK average to visit parks or gardens and museums/ galleries and are less likely than the UK average to conduct rural activities such as visiting the coast, countryside or National Parks.



Demographics and holiday characteristics: Holiday visitors

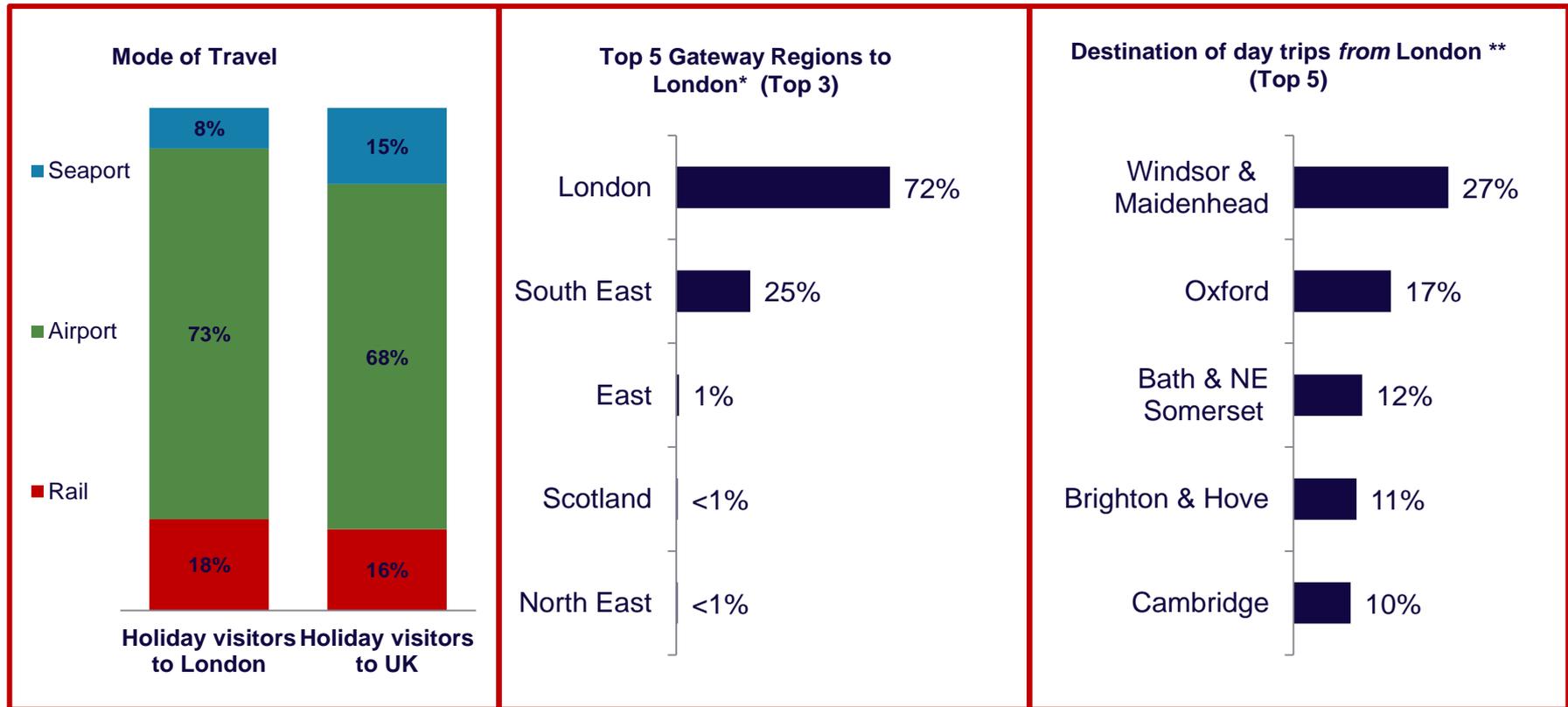
25-34 year olds make up the largest age group of holiday visitors to London. Although most likely to visit in July to September, a similar proportion visit in April to June. Holiday visitors to London tend to book their trip independently and stay 4.9 nights on average. Average spend per trip and per night is greater than the UK average.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Airport is the most common mode of travel for holiday visitors to London and is higher than the UK average. Unsurprisingly, London is the top gateway region, although for 1 in 4 it is the South East. Windsor & Maidenhead is the most popular day-trip destination, followed by Oxford.



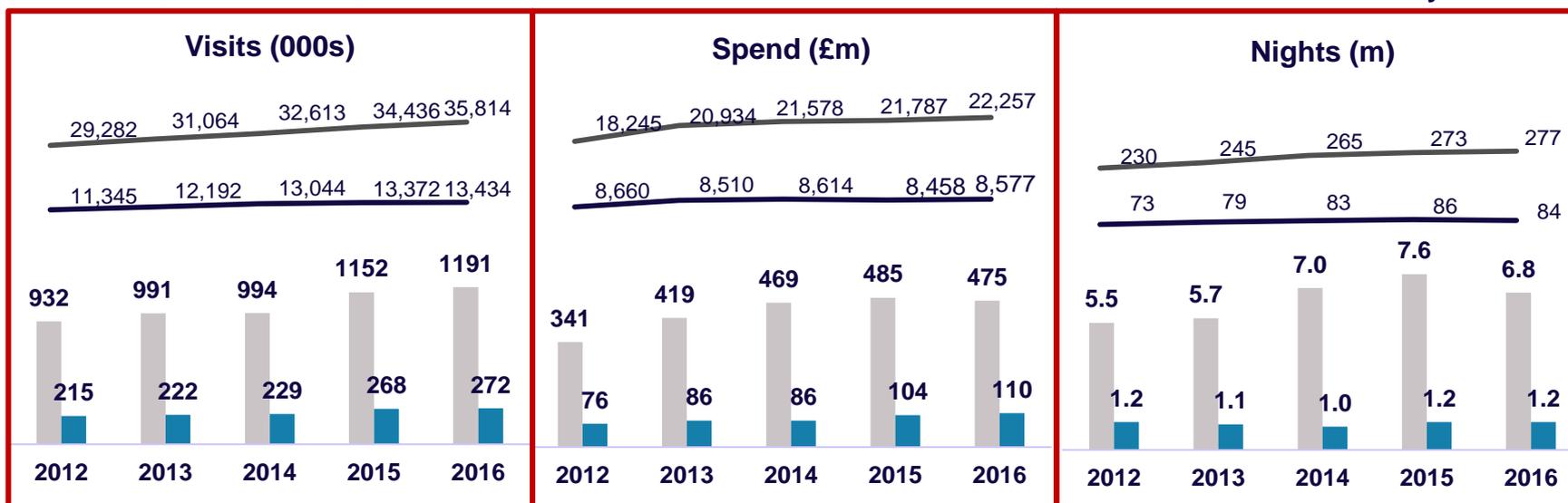
Headline stats: Overseas visits, spend and nights to Manchester

Manchester attracts 1.1 million overseas visits annually, 256,000 of which are for a holiday. Overall and holiday visit numbers, spend and nights-stayed increased significantly in 2015. Overall spend and nights-stayed declined overall in 2016, but holiday spend and nights stayed remains steady.

Visits, Spend and Nights to Manchester 3 year average for 2014-16*

Visits (000s)		Spend (£m)		Nights (m)	
Manchester Total	1,112	Manchester Total	467	Manchester Total	7.1
Manchester Holiday	256	Manchester Holiday	100	Manchester Holiday	1.1

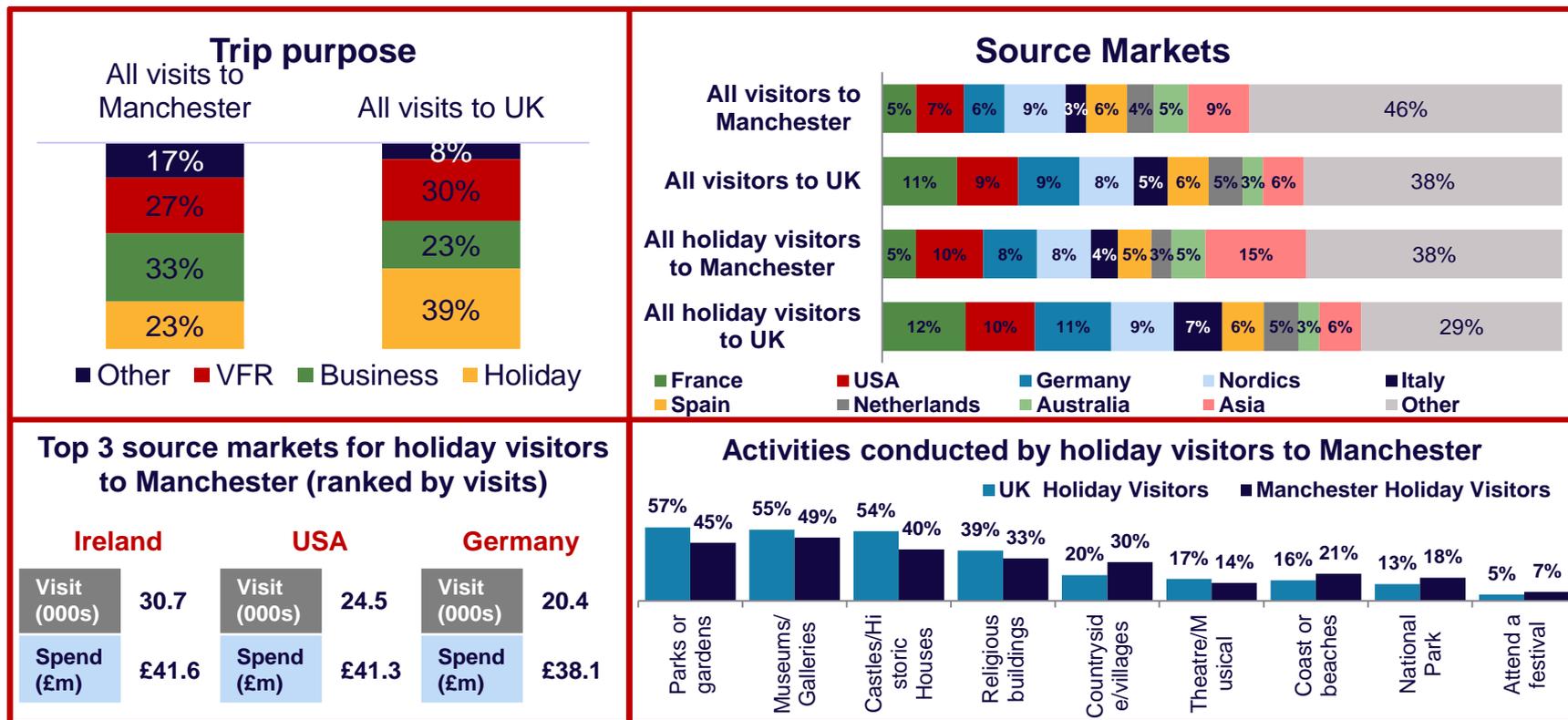
Visits, Spend and Nights 5 Year Trend



Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

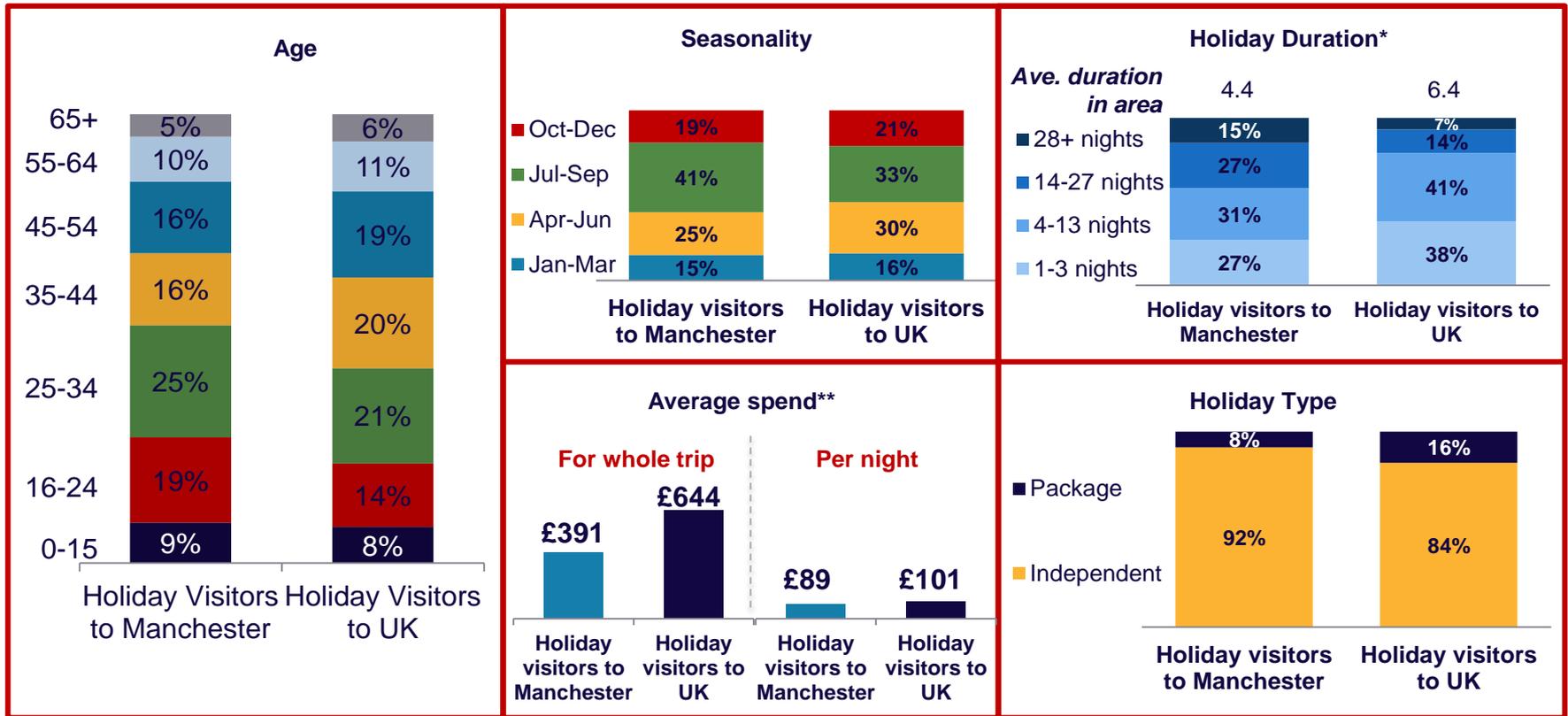
Trip purpose and source markets: All visitors and holiday visitors

Visitors to Manchester are more likely than visitors to the UK to be visiting for Business or 'Other' purposes. The highest number of holiday visitors come from Ireland. Manchester attracts a lower percentage of visitors from Mainland Europe than the UK in general. Holiday visitors to Manchester are less likely than average to visit cultural venues, but more likely to visit countryside/villages, the coast and national parks



Demographics and holiday characteristics: Holiday visitors

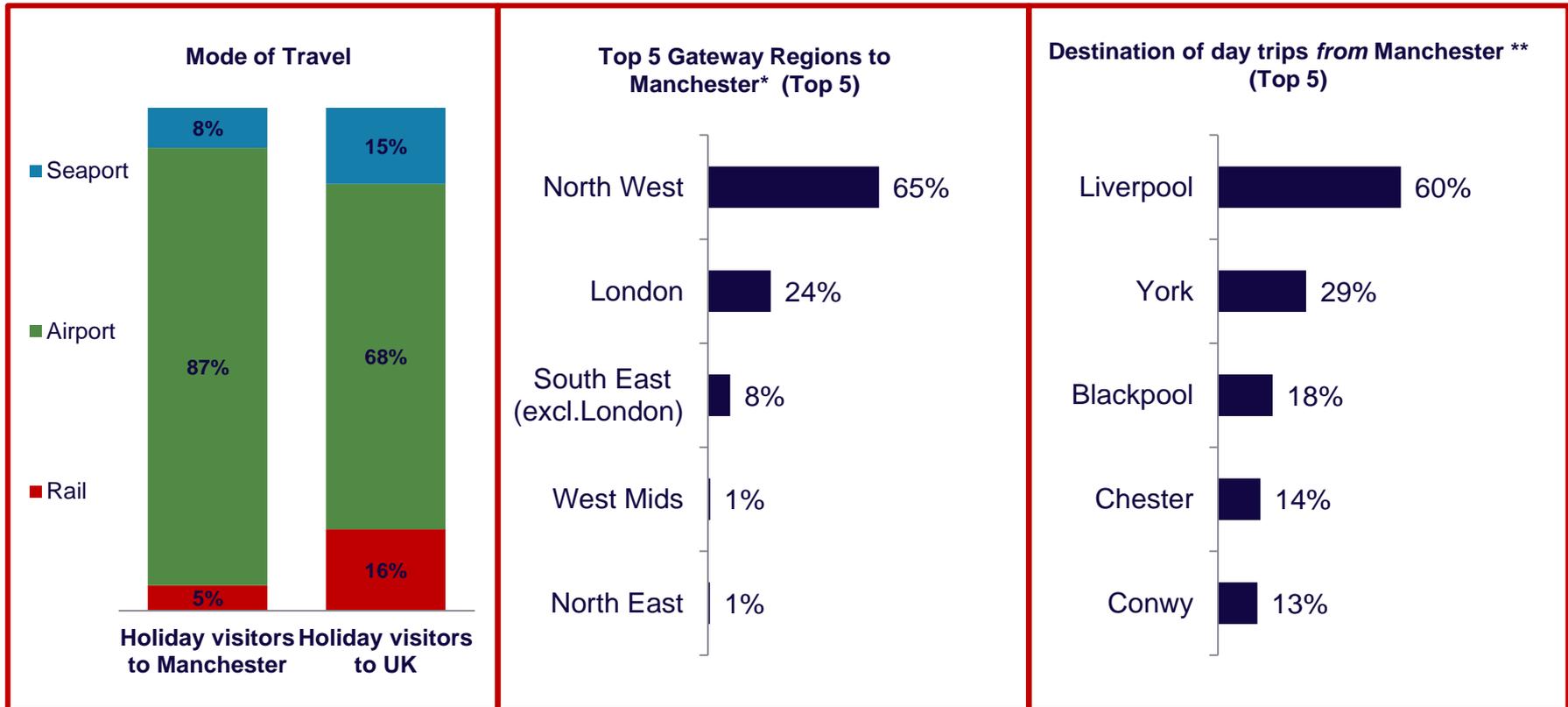
Holiday visitors to Manchester are more likely than the UK average to be aged 16-34, staying in the peak summer season and to have booked their holiday independently. On average holiday visitors to Manchester spend 4.4 nights in the City.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

The vast majority of Holiday visitors to Manchester travelled to the UK via airport, and via a North West gateway. Notably, nearly a third of holiday visitors to Manchester used a London or South East gateway. The most popular day trip destinations from Manchester are Liverpool, York and Blackpool.



Headline stats: Overseas visits, spend and nights to Newcastle Upon Tyne

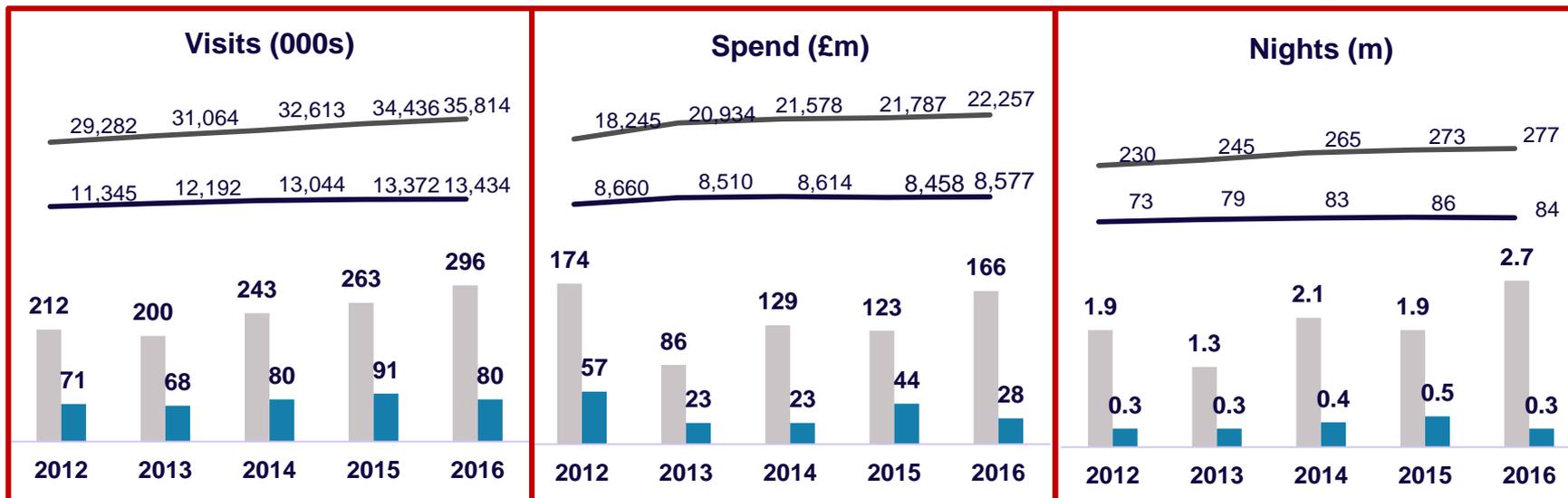
Newcastle attracts 268,000 visits annually, 84,000 of which are holiday visits.

Visits, Spend and Nights to Newcastle Upon Tyne 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Newcastle Total	268	Newcastle Total	139	Newcastle Total	2.2
Newcastle Holiday	84	Newcastle Holiday	32	Newcastle Holiday	0.4

Visits, Spend and Nights 5 Year Trend

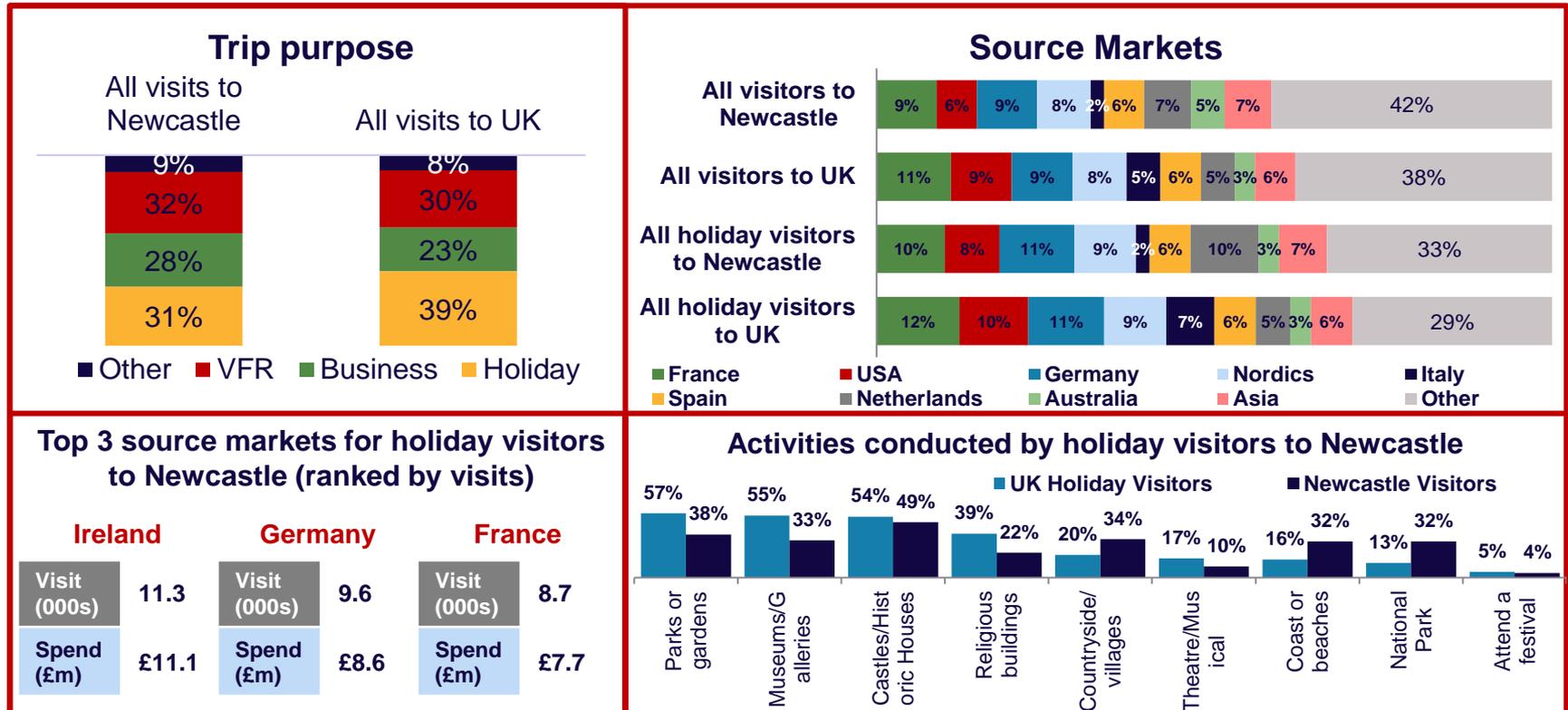
Newcastle Upon Tyne Total
 Newcastle Upon Tyne Holiday
 UK Total
 UK Holiday



Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

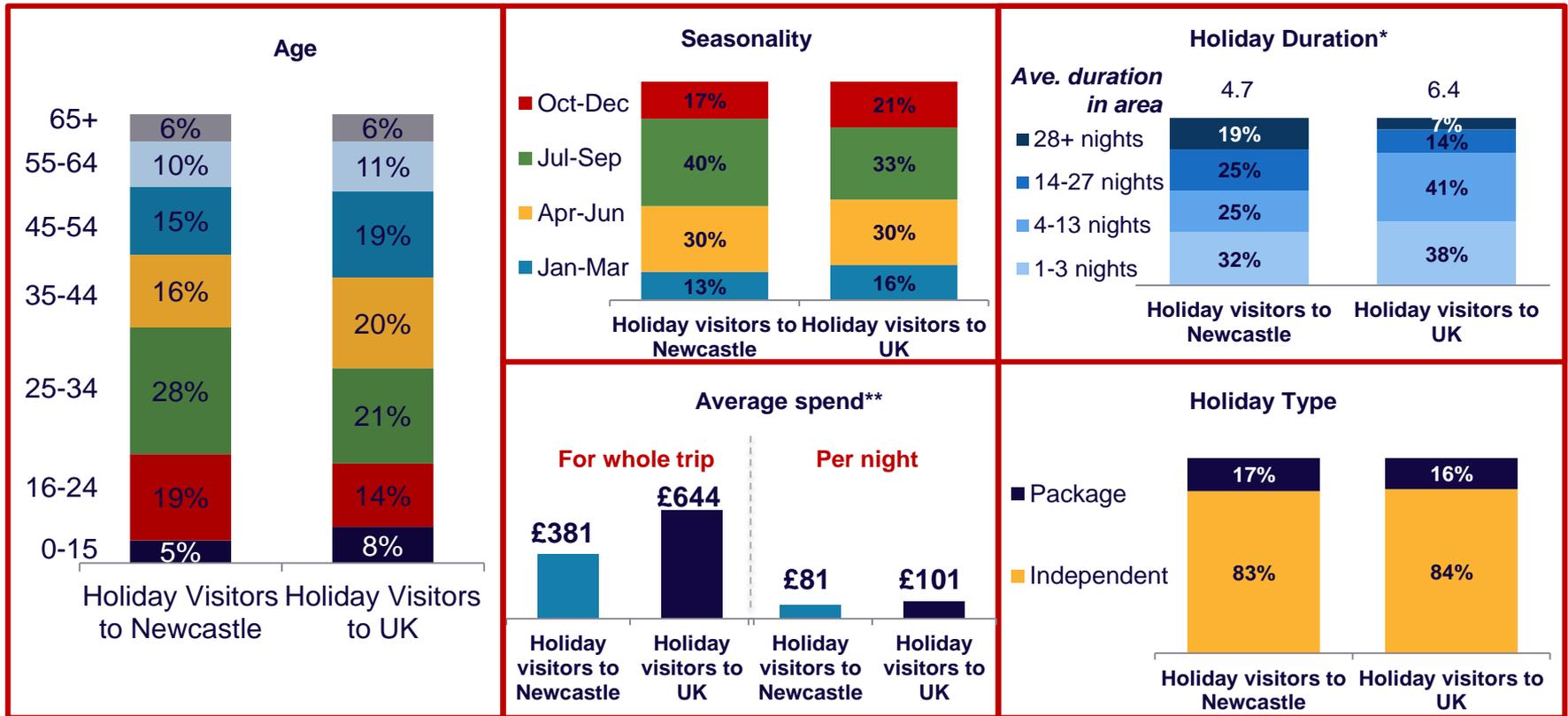
Trip purpose and source markets: All visitors and holiday visitors

Visiting friends or relatives is the most common trip purpose for visitors to Newcastle, followed closely by holiday. There are a greater number of business visits to Newcastle compared to the UK average. Holiday visitors to Newcastle are most likely to be from Ireland and are more likely than average to visit countryside/villages and coasts or beaches.



Demographics and holiday characteristics: Holiday visitors

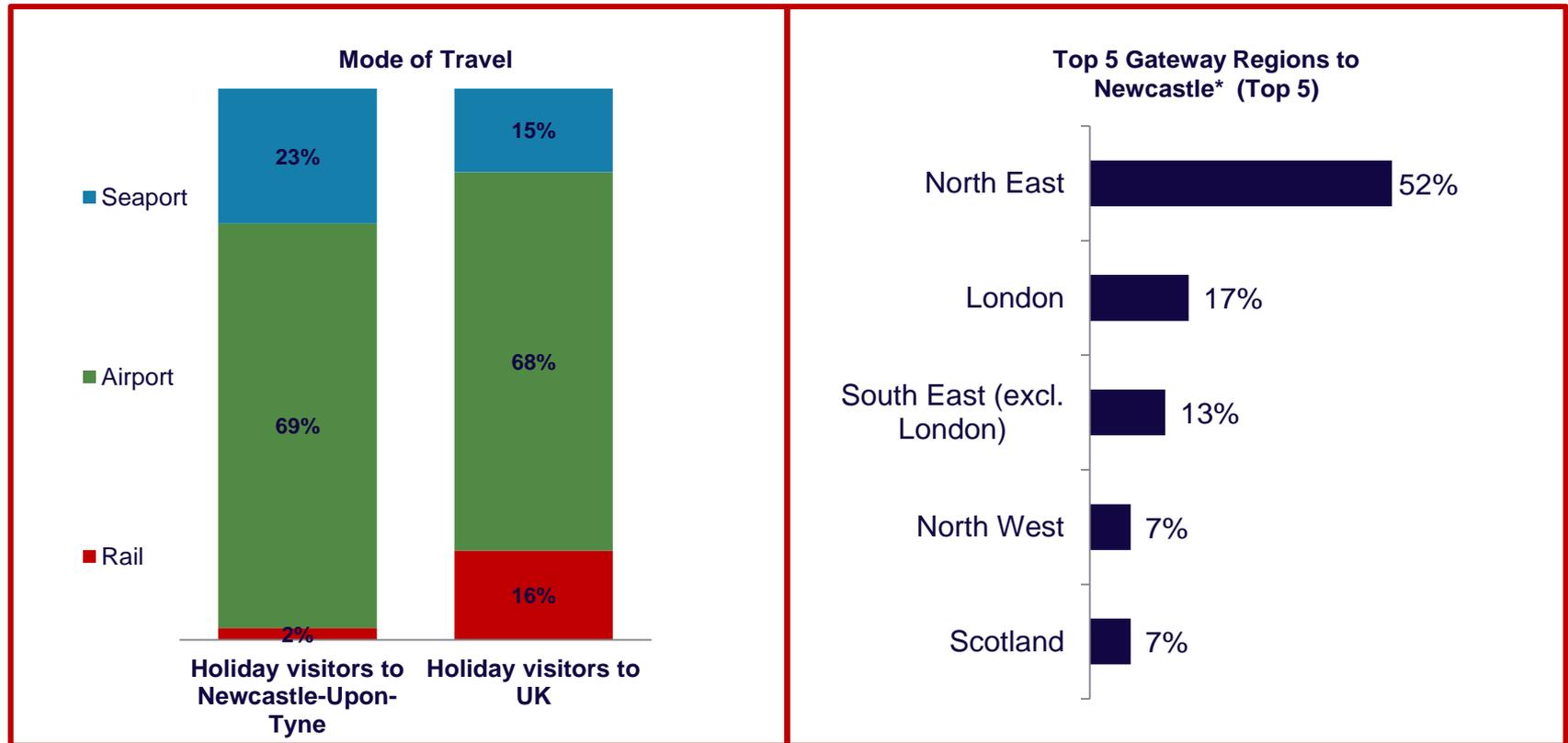
Holiday visitors to Newcastle are more likely than the UK average to be aged 25-34, visiting in the peak summer season and visiting for a longer duration. Holiday visitors spend 4.7 nights on average in Newcastle.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

The most common mode of travel for holiday visitors to Newcastle is airport via a North East gateway. Nearly a quarter of holiday visitors arrive in Newcastle via seaport, higher than the UK average.



Headline stats: Overseas visits, spend and nights to Nottingham

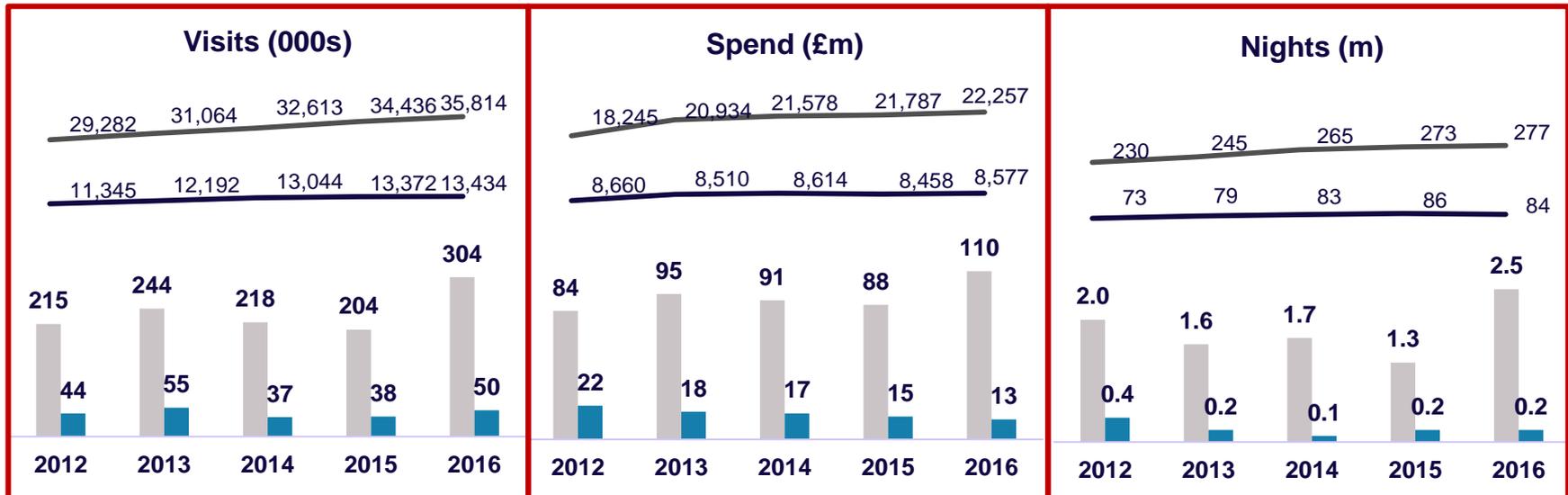
On average Nottingham attracts 242,000 overseas visitors annually, 42,000 of which are visiting for a holiday.

Visits, Spend and Nights to Nottingham 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Nottingham Total	242	Nottingham Total	96	Nottingham Total	1.8
Nottingham Holiday	42	Nottingham Holiday	15	Nottingham Holiday	0.2

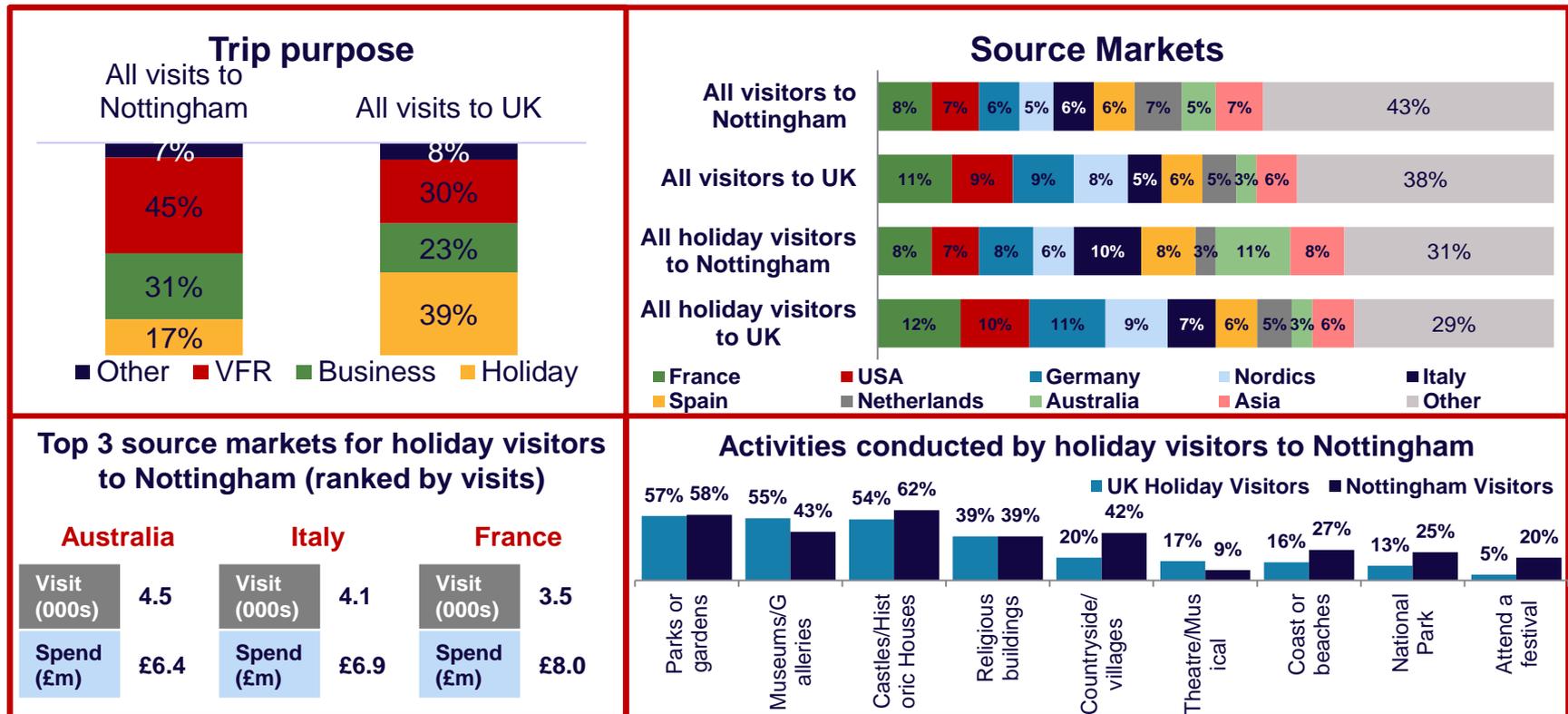
Visits, Spend and Nights 5 Year Trend

■ Nottingham Total ■ Nottingham Holiday
— UK Total — UK Holiday



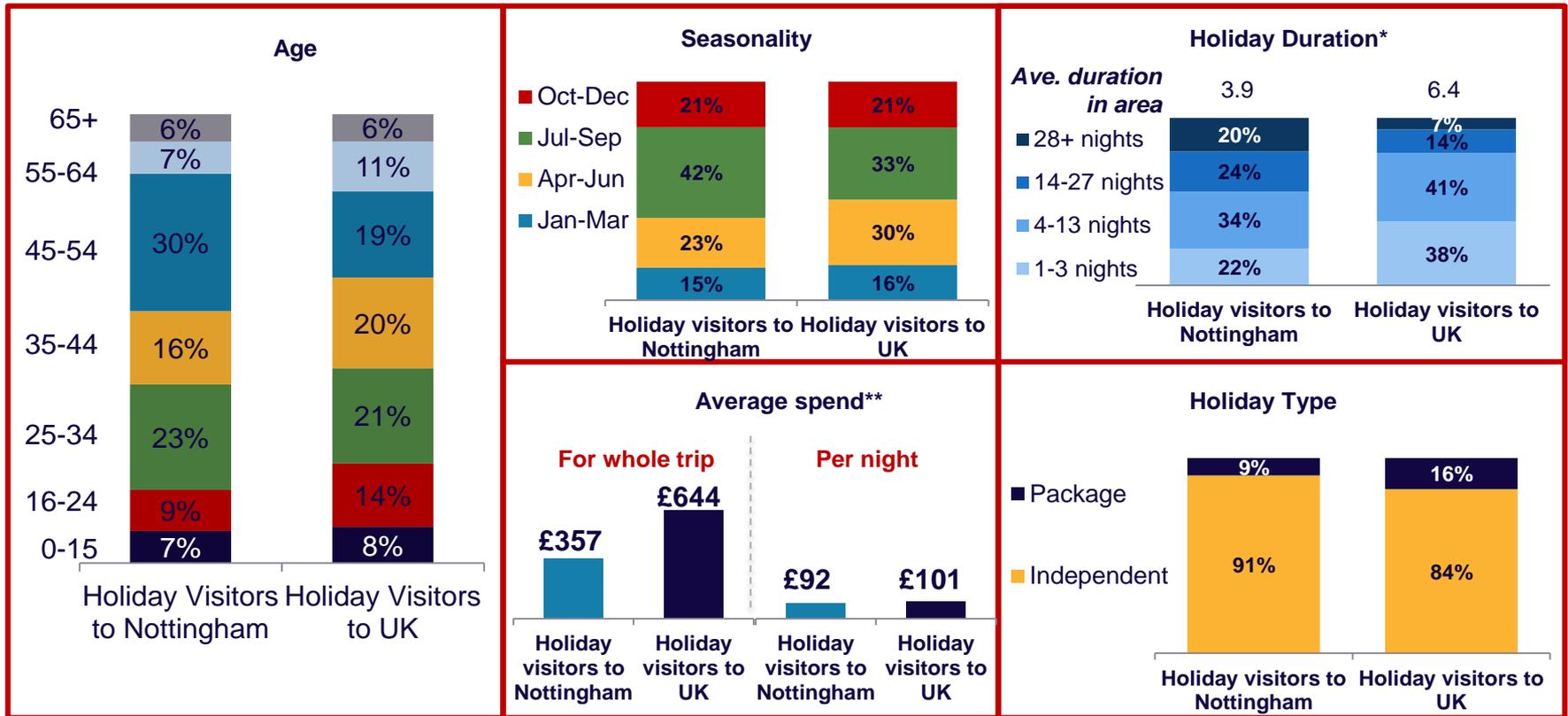
Trip purpose and source markets: All visitors and holiday visitors

Visiting friends or relatives and business trips are the most common trip purposes amongst all visits to Nottingham and are higher than the UK average. The top source market amongst holiday visitors to Nottingham is Australia. Holiday visitors to Nottingham are more likely than the UK average to visit castles/historic houses and countryside/ villages.



Demographics and holiday characteristics: Holiday visitors

Overseas holiday visitors to Nottingham are more likely to be older than UK visitors on the whole, to stay in the peak summer season and to book their holiday independently.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Holiday visitors to Nottingham are more likely than the UK average to arrive by airport or seaport. The most common gateway regions are London and South East.



Headline stats: Overseas visits, spend and nights to Oxford

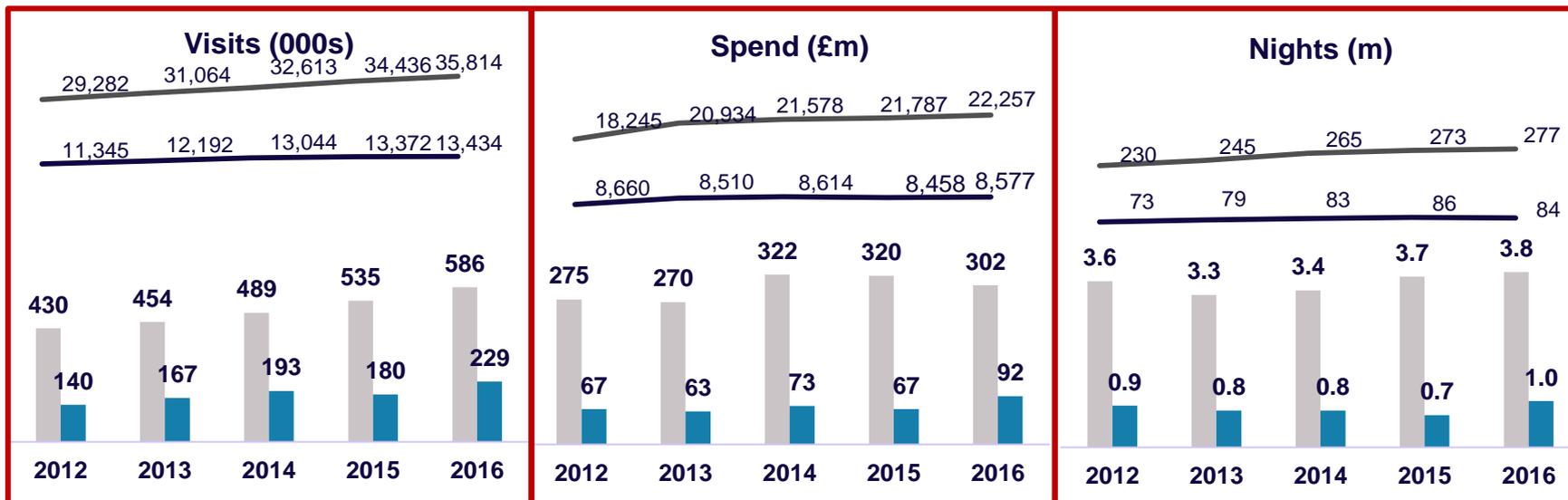
Total and holiday visits to Oxford have steadily increased since 2012 numbering 537,000 annual visits on average. Holiday visits, spend and nights increased significantly in 2016, each higher than in any of the previous 5 years.

Visits, Spend and Nights to Oxford 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Oxford Total	537	Oxford Total	315	Oxford Total	3.6
Oxford Holiday	200	Oxford Holiday	77	Oxford Holiday	0.8

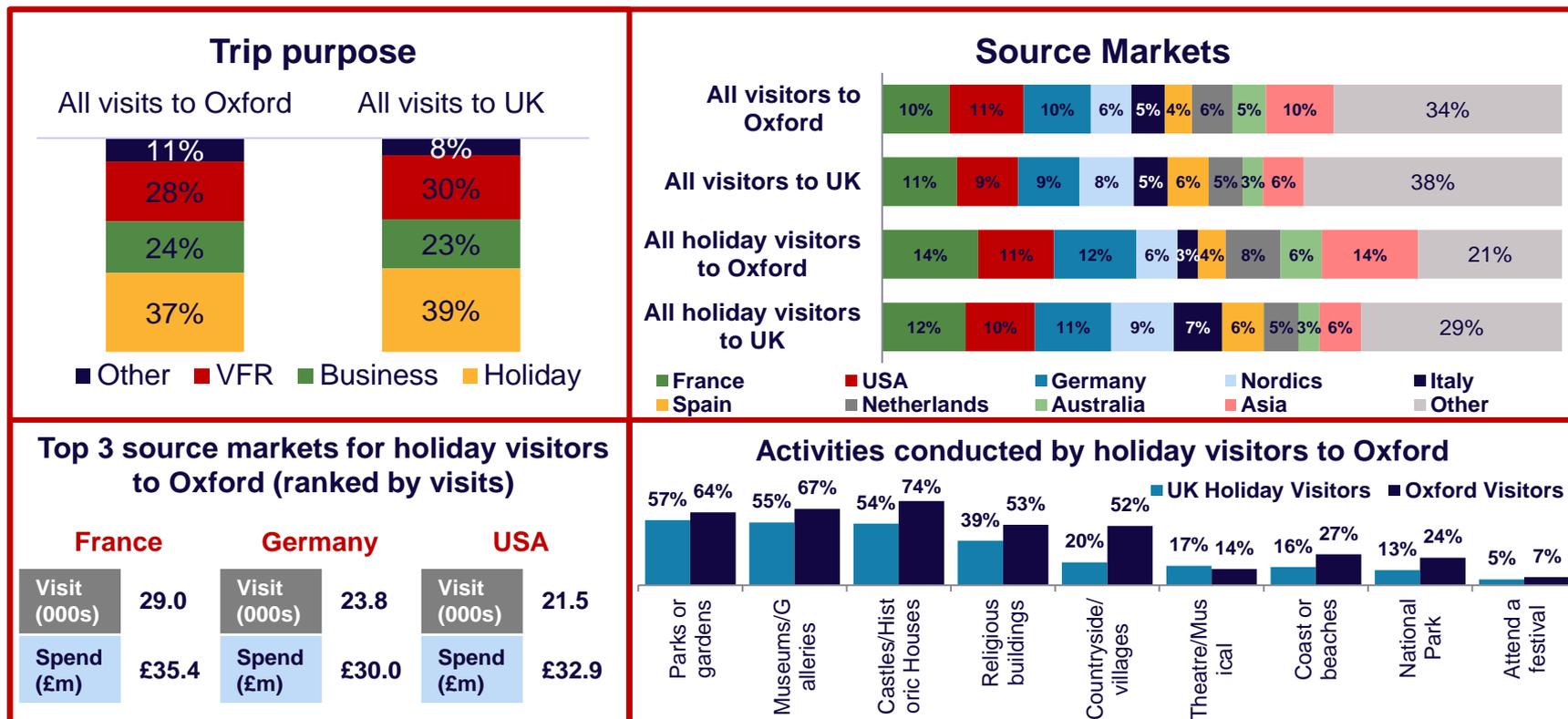
Visits, Spend and Nights 5 Year Trend

■ Oxford Total ■ Oxford Holiday
— UK Total — UK Holiday



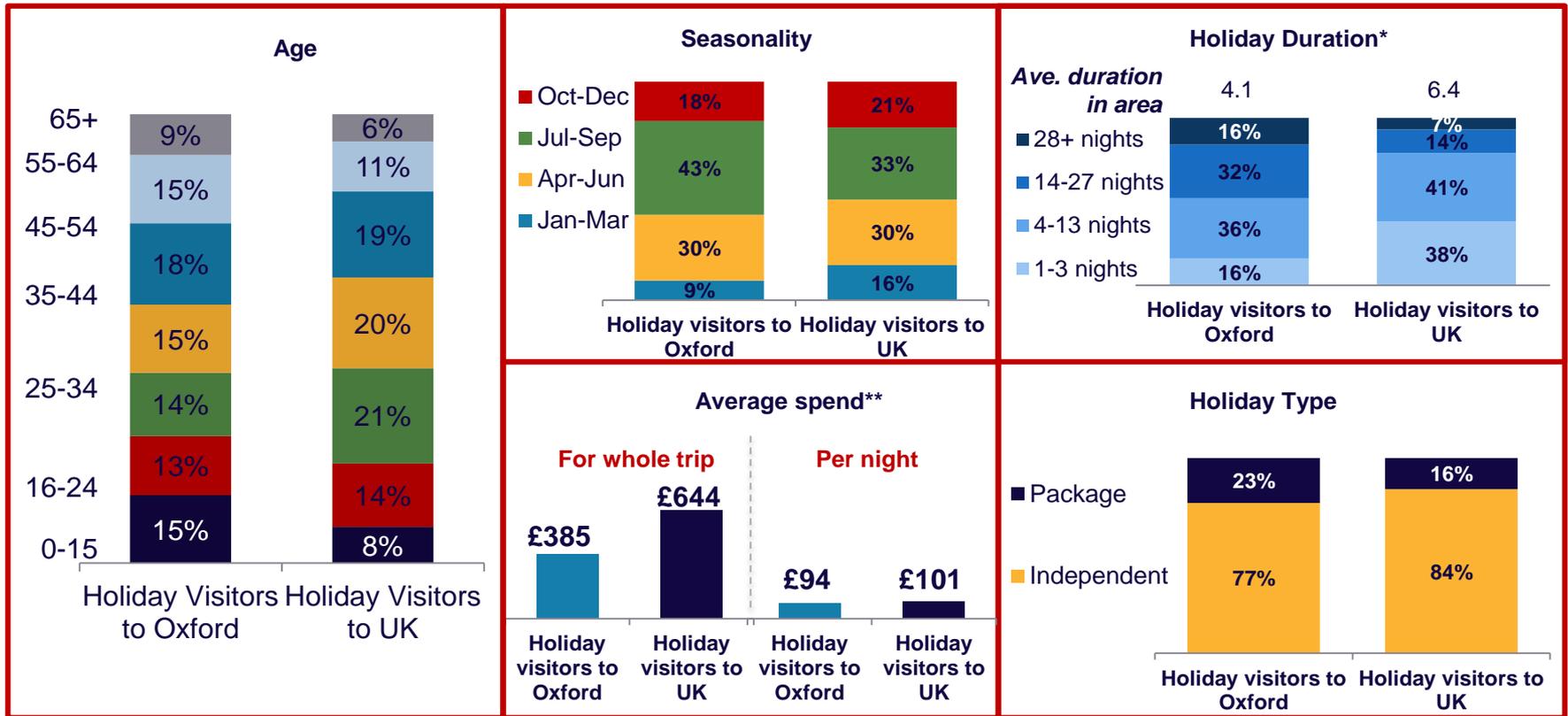
Trip purpose and source markets: All visitors and holiday visitors

Trip purpose amongst all visits to Oxford is similar to the UK average, with the largest proportion of visits recorded as holiday. When it comes to activities, holiday visitors to Oxford are more likely to visit countryside/villages than the UK average. They are also more likely to engage in cultural activities such as visiting museums/galleries, castles/historic houses and religious buildings.



Demographics and holiday characteristics: Holiday visitors

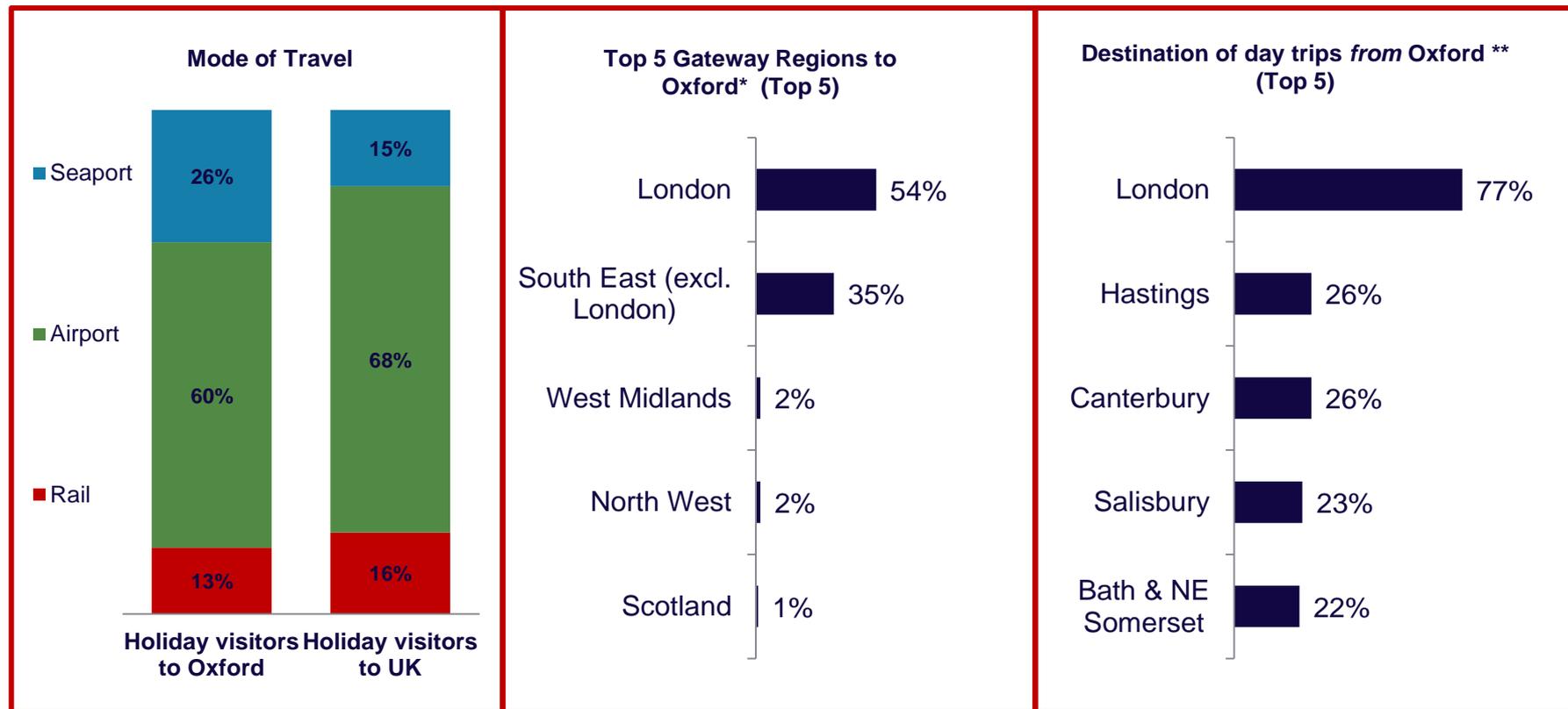
Oxford tends to attract a higher proportion of younger (0-15) visitors than the UK average. Visits are most likely to be made in July to September, significantly higher than the UK average. They are also more likely than average to be part of a package holiday. Holiday visitors stay in Oxford 4.1 nights on average.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Holiday visitors to Oxford are most likely to arrive in the UK by airport although a significantly higher than average proportion arrive via a seaport. London is the top gateway region, followed by the South East. London is the leading day trip destination for holiday visitors to Oxford, followed by Hastings and Canterbury.



Headline stats: Overseas visits, spend and nights to **Stratford Upon Avon**

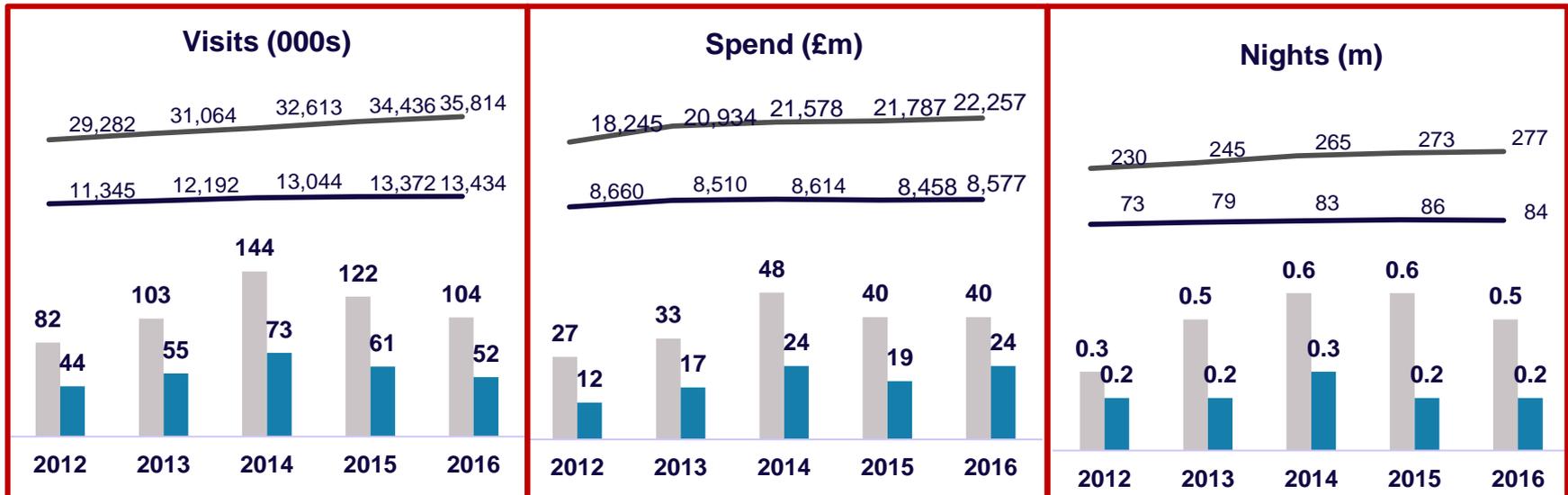
Stratford-Upon-Avon attracts 123,000 visitors annually, around half of which are holiday visitors.

Visits, Spend and Nights to Stratford Upon Avon 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Stratford Total	123	Stratford Total	43	Stratford Total	0.6
Stratford Holiday	62	Stratford Holiday	22	Stratford Holiday	0.3

Visits, Spend and Nights 5 Year Trend

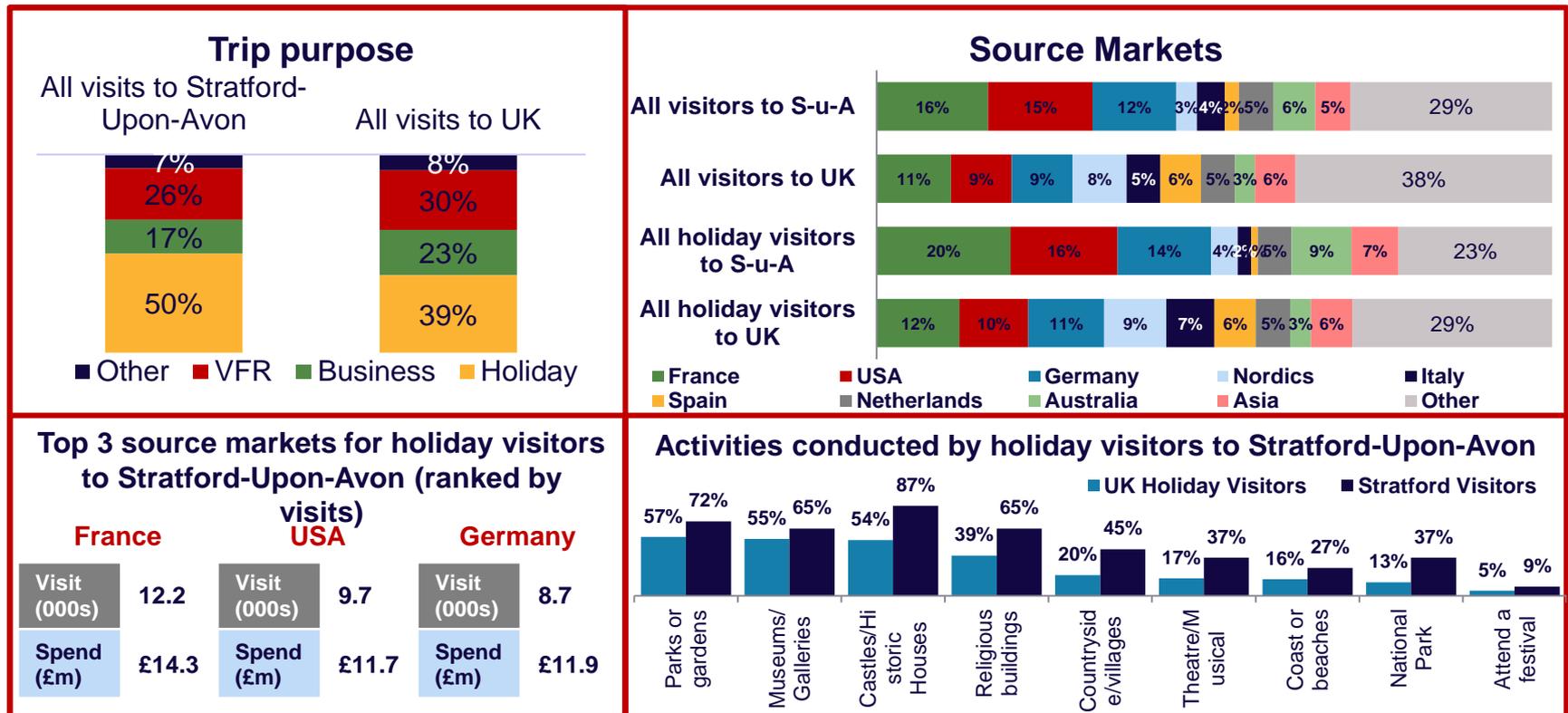
■ Stratford Upon Avon Total ■ Stratford Upon Avon Holiday
— UK Total — UK Holiday



Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

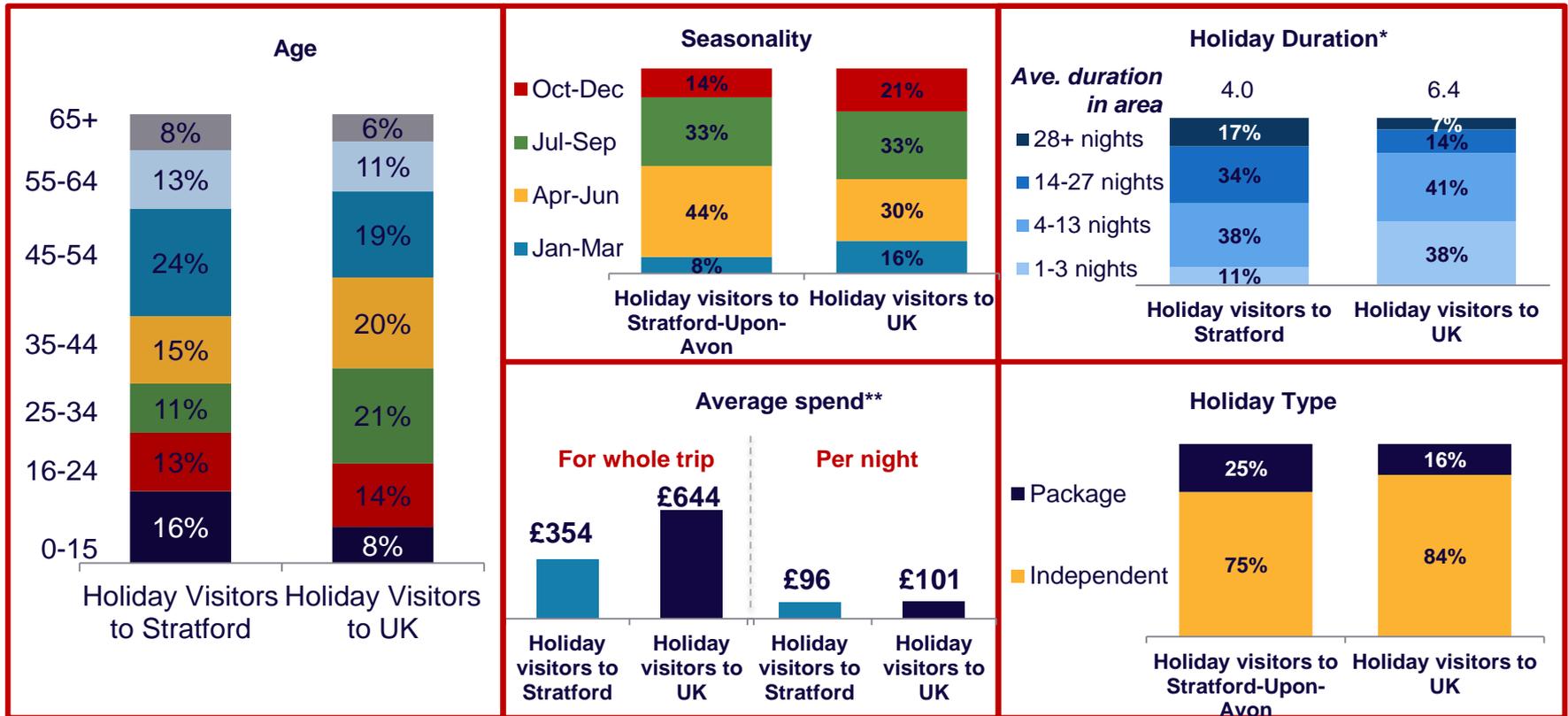
Trip purpose and source markets: All visitors and holiday visitors

Half of visits to Stratford-Upon-Avon are for the purpose of holiday. These holiday visitors are most commonly from France, USA and Germany. When it comes to activities, holiday visitors to Stratford-Upon-Avon are more likely than the UK average to visit castles/historic houses and parks or gardens.



Demographics and holiday characteristics: Holiday visitors

Overseas holiday visitors to Stratford-Upon-Avon tend to be older than holiday visitors to the UK in general. They are also more likely to be on a package holiday and to be visiting between April and June.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Although airport is the most likely gateway, holiday visitors to Stratford-Upon-Avon are more likely than the UK average to arrive by seaport or rail. The top gateway regions are London and South East.



Headline stats: Overseas visits, spend and nights to Windsor

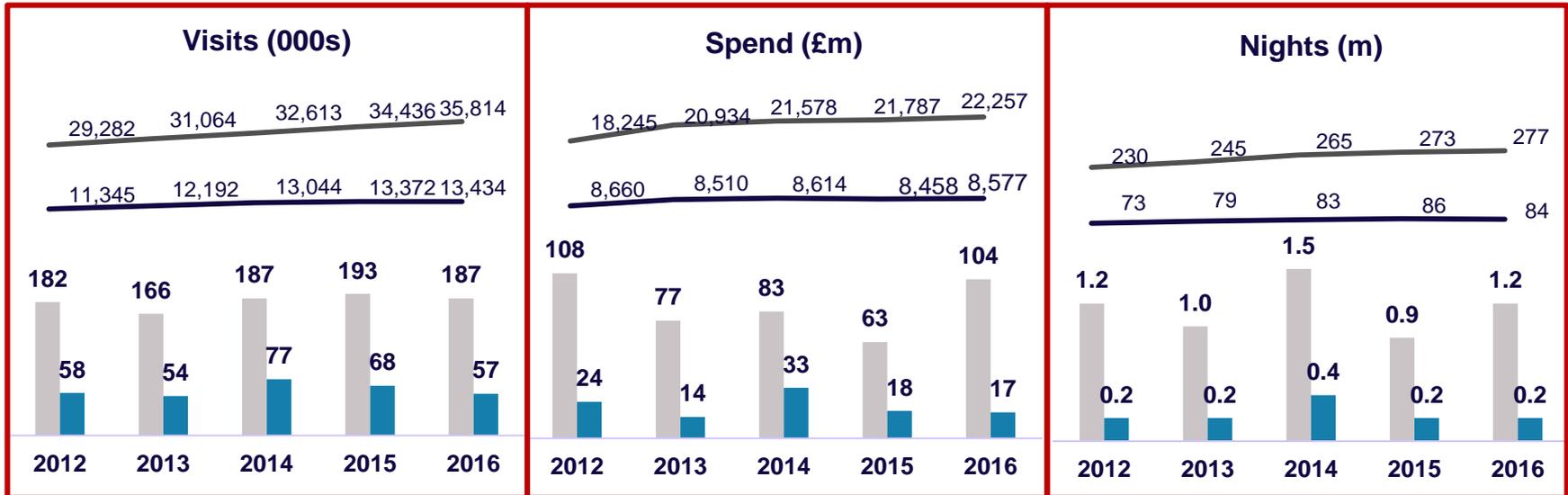
On average Windsor welcomes 189,000 overseas visitors each year, around a third of whom are visiting for a holiday. It's worth noting that these figures do not take into account day visits to Windsor, a significant proportion of which are taken from overnight visitors to London.

Visits, Spend and Nights to Windsor 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
Windsor Total	189	Windsor Total	83	Windsor Total	1.2
Windsor Holiday	67	Windsor Holiday	23	Windsor Holiday	0.3

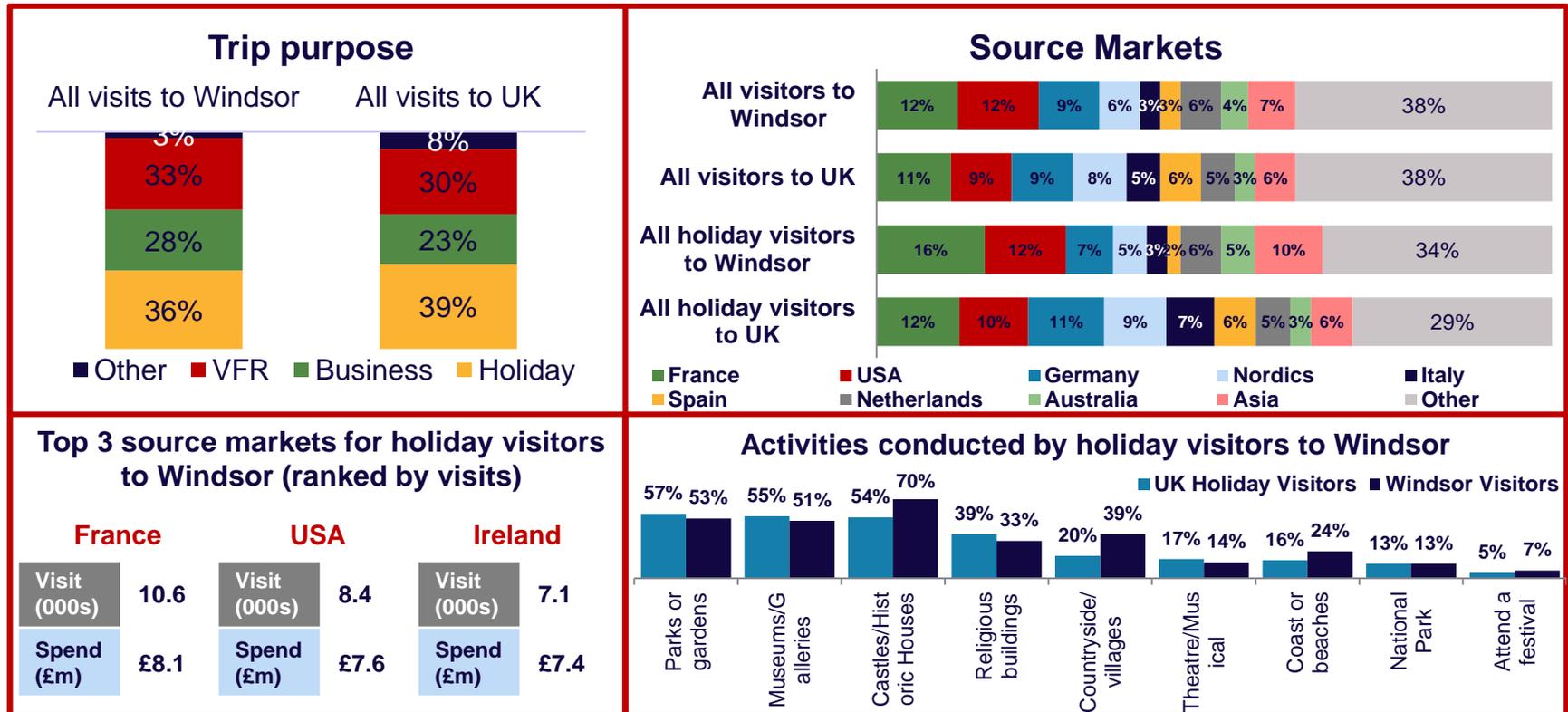
Visits, Spend and Nights 5 Year Trend

Windsor Total
 Windsor Holiday
 UK Total
 UK Holiday



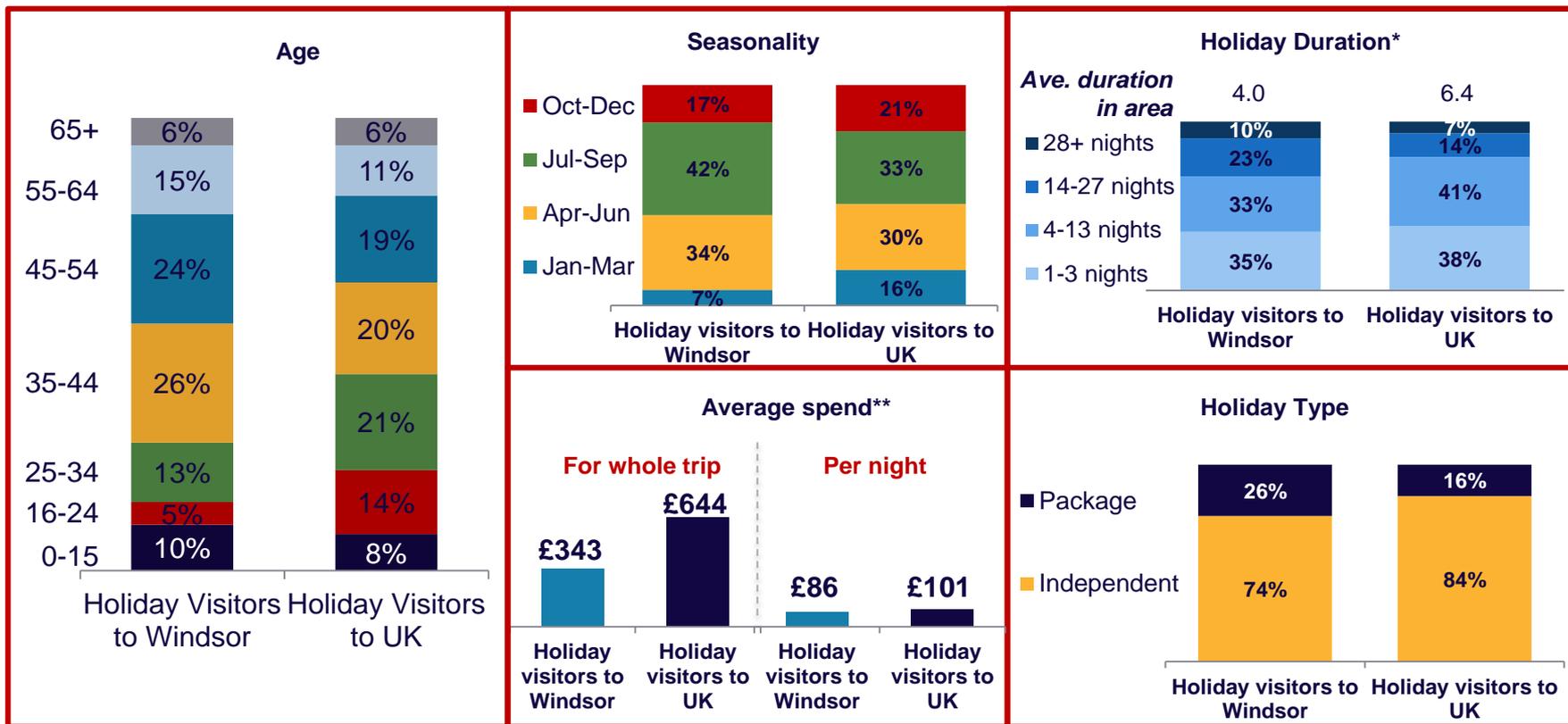
Trip purpose and source markets: All visitors and holiday visitors

Overseas visits to Windsor are most likely to be for a holiday, although this is lower than the UK average. Visitors are more likely than average to be visiting friends or relatives or for business. The top source market to Windsor is France - 1 in 10 are from Asia, higher than the UK average. Holiday visitors to Windsor are more likely than the UK average to visit castles or historic houses and countryside/ villages.



Demographics and holiday characteristics: Holiday visitors

Holiday visitors to Windsor are more likely than average to be aged 35-44, visiting between July and September and on a package holiday.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

Holiday visitors to Windsor are most likely to have arrived by airport via the London region.



Headline stats: Overseas visits, spend and nights to York

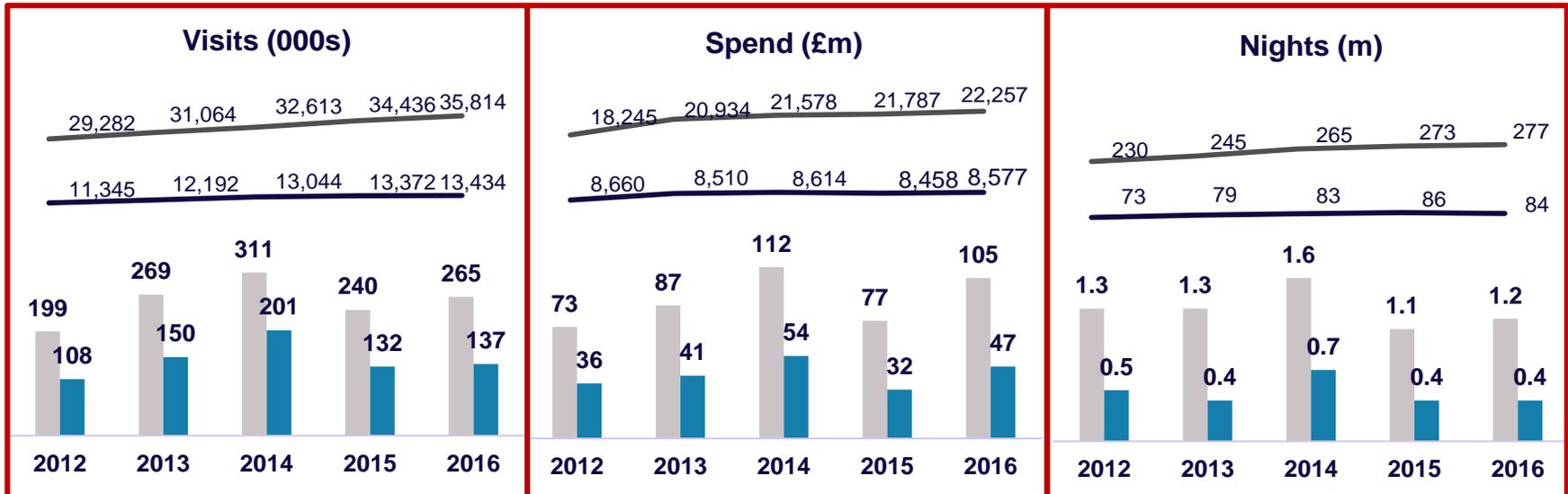
York attracts 272,000 overseas annual visitors on average, 157,000 of which are visiting for a holiday.

Visits, Spend and Nights to York 3 year average for 2014-16

Visits (000s)		Spend (£m)		Nights (m)	
York Total	272	York Total	98	York Total	1.3
York Holiday	157	York Holiday	44	York Holiday	0.5

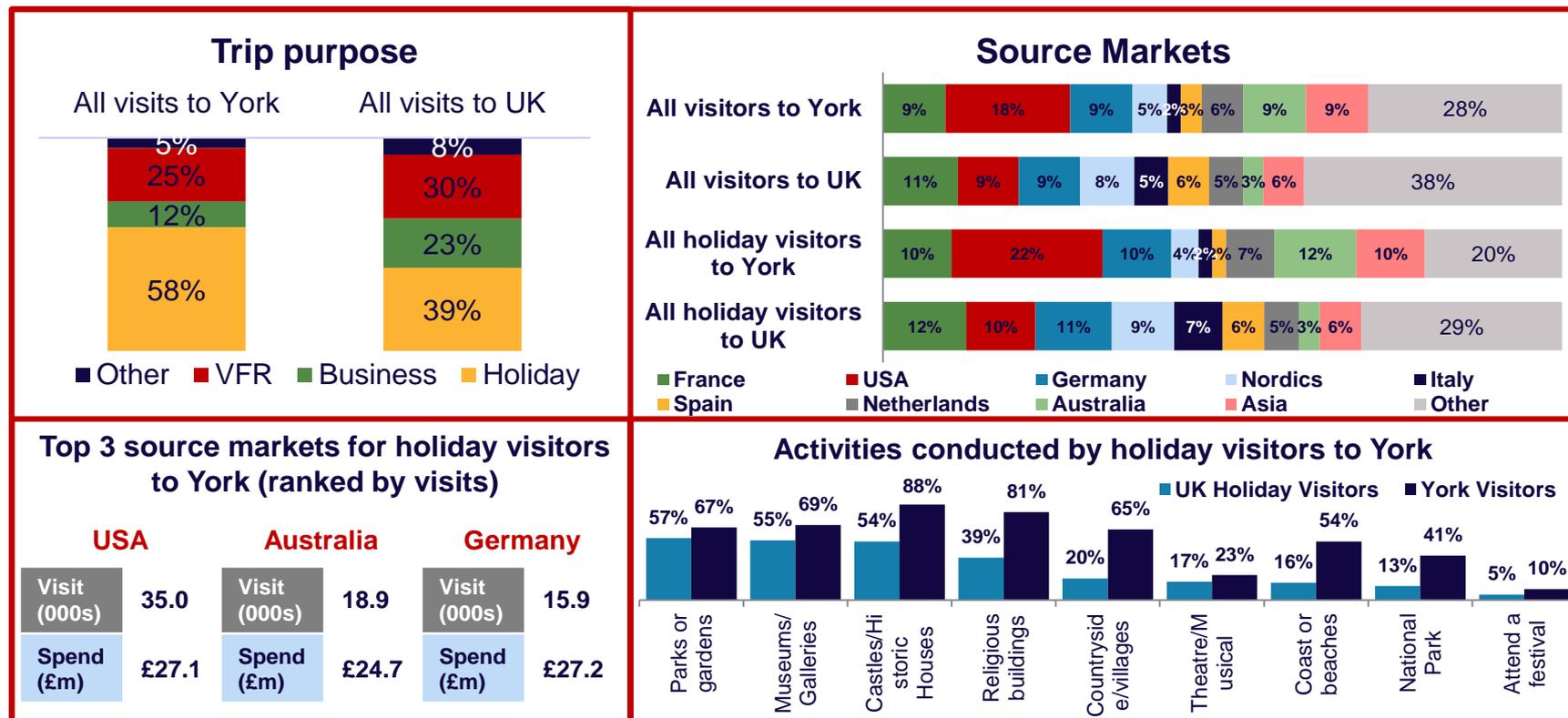
Visits, Spend and Nights 5 Year Trend

■ York Total ■ York Holiday
— UK Total — UK Holiday



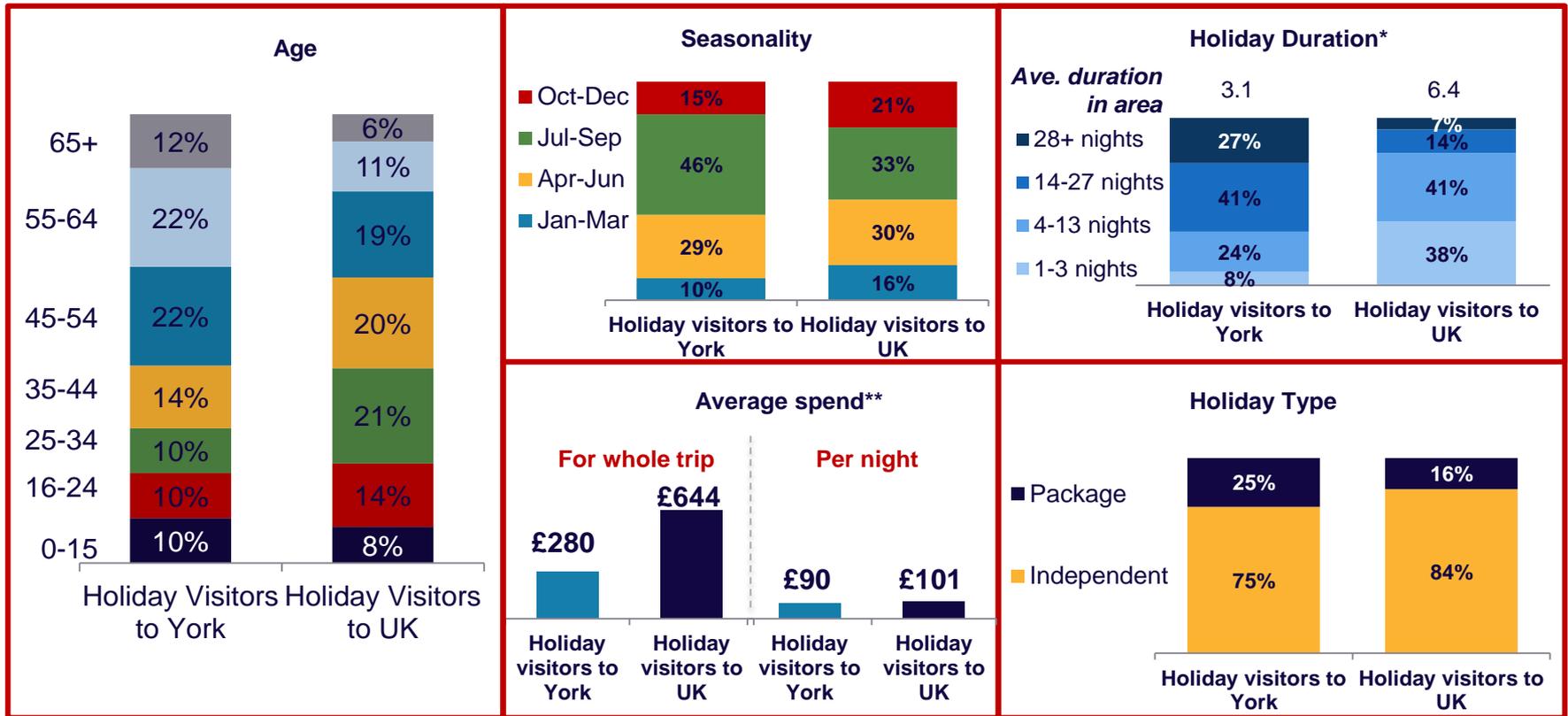
Trip purpose and source markets: All visitors and holiday visitors

Nearly 3 in 5 overseas visitors to York are visiting for a holiday, significantly higher than the UK average. Visitors are most likely to be from the USA, 22% falling into this category (over twice the UK average). Holiday visitors to York are significantly more likely than average to conduct cultural and rural activities.



Demographics and holiday characteristics: Holiday visitors

Holiday visitors to York tend to be older than Holiday visitors to the UK, over a third aged over 55 (compared to 17% to the UK on average). Visits are most likely to take place between July and September. For around 1 in 4, the holiday is part of a package.



Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: Holiday visitors

1 in 4 visitors to York travel to the UK via seaport, 6 in 10 via airport. London is the most common gateway region, likely driven by the high proportion of visitors from the USA

