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

Destination type report: a profile of overseas visitors who stay in England’s different types of cities and towns

March 2017
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Introduction
Background

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

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

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

For these reasons, VisitEngland have commissioned BDRC Continental undertake a substantial programme of tailored secondary research to ensure that bidders can easily access and use existing market intelligence to shape both year 1 and years 2-3 projects. The focus of this programme is the international consumer – while the fund is also intended to stimulate domestic tourism, bids must in the first instance demonstrate their potential to generate growth from inbound markets – and therefore all analysis should be focused on inbound markets.
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 aims to draw upon the most up-to-date research available. Given the requirement to present results at individual destination type level, **IPS data has been combined for 2013, 2014 and 2015** so that sample sizes for the smaller destination types remain robust.

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

## Destination type - definitions

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Individual Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>London (including all London boroughs except Greenwich)</td>
</tr>
<tr>
<td>Core Cities</td>
<td>Birmingham, Bristol, Leeds, Liverpool, Manchester, Newcastle, Nottingham, Sheffield</td>
</tr>
<tr>
<td>Urban Areas 200k+</td>
<td>ALL CORE CITIES PLUS Middlesbrough, Tyneside conurbation, Sunderland, Hull, Bradford, Greater Manchester conurbation, Stoke-on-Trent, West Midlands conurbation, Coventry, Derby, Leicester, Northampton, Luton, Norwich, South Glos., Plymouth, Portsmouth, Southampton</td>
</tr>
<tr>
<td>Coastal Towns</td>
<td>Barrow, Stockton/Hartlepool, Berwick, Blackpool, Sefton, Scarborough, Tendring, Southend, Great Yarmouth, Isle of Wight, Penwith, Torbay, Weymouth, Bournemouth, Christchurch, Poole, Havant, Thanet, Dover, Shepway, Brighton, Eastbourne, Hastings, Chichester, Worthing</td>
</tr>
<tr>
<td>Other Towns*</td>
<td>Other pre-dominantly urban areas in England (see Appendix for full list)</td>
</tr>
<tr>
<td>Other Rural*</td>
<td>Other pre-dominantly rural areas in England (see Appendix for full list)</td>
</tr>
<tr>
<td>Non-England</td>
<td>Destinations in Scotland, Wales or Northern Ireland</td>
</tr>
</tbody>
</table>
Executive summary
Executive summary / 1

What is the overall size and shape of the market by destination type?

- The following proportions of overseas holiday visitors to the UK stay in each of these destination types for at least one night:
  - 9% stay in urban areas which have a population of at least 200k (1.2m visitors)
  - 7% staying in one of the eight core cities (0.9m visitors)
  - 7% stay in a heritage city (0.9m visitors)
  - 6% stay in a coastal town (0.7m visitors)
  - 9% stay in an ‘other town’ (1.2m visitors)
  - 7% stay in a rural destination (0.8m visitors)
- Holiday visitors make up significant proportions of visitors staying in each of coastal towns (45%), heritage cities (43%) and to a lesser extent, rural areas (35%) – although this is still lower than among those staying in London (50%)
- Those on a holiday trip make up a much lower proportion of those staying in major urban areas (22%) – many business visitors - and other towns (24%) – many staying with friends / relatives.
- After London, Manchester (268k), Brighton (211k), Bath (208k) and Liverpool (198k) attracted the highest number of staying holiday visitors in 2015.
- Four of the eight core cities are represented within the top 12 individual destinations, along with five heritage cities and two coastal towns (Brighton and Hastings)
- Top destinations in each region:
  - Bath (South West), Brighton (South East)
  - Newcastle (North East), Manchester (North West), York (Yorkshire)
  - Birmingham (West Midlands), Nottingham (East Midlands), Cambridge (East)
Executive summary / 2

What is the origin of England’s holiday visitors by destination type?

• European representation among holiday visitors is much higher among those staying in destinations outside of London, especially in coastal towns (84%)
• Other than coastal towns, other non-London destination types typically see two-thirds of staying visitors as European, 10%-14% from North America and around a fifth from the Rest of the World
• North American visitors (20%) are particularly well represented among those staying in UK destinations outside of England
• There is a distinctive profile of those staying in coastal towns – 28% are from Germany, 13% from France and 9% from Netherlands. Indeed, visitors from Germany and the Netherlands (and to a lesser extent, Australia) are more likely to be represented among those staying in every destination type outside of London than in London itself
• The reverse is true for holiday visitors from Italy and Spain – they are usually more likely to be seen in London than in other destination types
• Visitors from the USA (12%) and France (13%) are well represented in heritage cities compared with other destination types
• Holiday visitors from Germany (18%), Netherlands (12%) and Australia (8%) are also well represented among those staying in rural destinations
• The USA (16%) and Germany (15%) are also very well represented among those staying in destinations outside of England during their holiday trip
Executive summary / 3

How else do England’s holiday visitors vary by destination type?

• Overnight holiday stays in any of the destination types outside of London are more likely to take place during the peak July-September period (typically 40%-44% of trips). This is particularly the case for rural destinations, where 50% of those staying do so in this July-September period.

• Whilst only 17% of holiday visitors who stay in London during their trip have a total holiday length of more than 7 nights, this is much higher among those staying in non-London destinations – typically around 40% tend to stay more than 7 nights in total, although this rises to 54% among those staying in rural destinations (including 22% who stay at least 15 nights).

• Package holidays are much more common among those staying in coastal towns (28%) and heritage cities (23%) than among holiday trips to England overall (17%).

• The age profile of holiday visitors to England varies significantly by destination type:
  – For holiday visitors staying in London and other major urban areas, the age profile is much younger, with typically 40% of visitors aged under 35 years.
  – Visitor age profile is much older among those staying in heritage cities, coastal towns and especially, rural areas (where 36% are aged 55 years or over).

• Families (visitors with a child aged under 16 in their party) on holiday trips to the UK are more likely to stay in non-London destinations than other types of visitor. Families are more likely than other visitors to stay in each type of non-London destination.

• Within London (73%) and other major urban areas (59%) – especially core cities (63%) – the majority of visitors stay in hotels. Although still fairly high in heritage cities (54%), hotel stays are much less common in each of coastal towns (45%), other towns (44%) and rural areas (40%).
What is the overall size and shape of the market by destination type?

Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015
Proportion of UK visitors who stay in each type of destination (2013-15 average)

As context, we know that 32% of all holiday trips to England made by overseas visitors involve a stay outside of London. Holiday visitors to the UK are significantly less likely to stay overnight in destinations outside of London than those visiting for other reasons (primarily visiting friends / relatives or on business), especially to the large cities. Only 9% of holiday visitors to the UK stay overnight in an urban area with a population of 200k or more compared with 17% among visitors to the UK overall. Similarly, only 9% of holiday visitors stay in ‘other towns’ compared with 15% among visitors overall.

However, likelihood of holiday visitors staying in each of heritage cities, coastal towns and other rural areas is as high as for visitors as a whole – around 5% to 7% of both holiday visitors and visitors as a whole staying in each of these.
Volume of UK visitors who stay in each type of destination (2013-15 average)

Over the 2013-15 period, an average of 11.8m overseas visitors stayed overnight in England. 8.7m of these visitors spent at least one night in London.

Annual overnight stays in other types of destination ranged from 0.7m in coastal towns up to 1.2m in major urban areas and 1.2m in ‘other towns’.
There is a strong representation of holiday visitors among those staying overnight in London (50%), coastal towns (45%), heritage cities (43%) and, to a lesser extent, other rural destinations (35%).

The representation of holiday visitors is much lower among those staying in urban areas of 200k+ population (22%) and within this, core cities (23%). Business travel represents a much larger proportion of visitors here – around a third.

‘Other towns’ also have a lower representation of holiday visitors, with those visiting friends / relatives (42%) accounting for the most significant proportion of visitors staying in these destinations. Those visiting friends / relatives also account for a large proportion of visitors staying in rural destinations (also 42%).
## Destination type visit combinations for England’s holiday visitors

10% of all holiday trips to England include staying in more than one destination type during their trip – London being included as a destination type.

Within this, the most common combinations include London plus another destination type – especially major urban areas (25%) and heritage cities (23%).

Volumes of other destination type combinations are all fairly similar.

### Source: IPS 2013, 2014, 2015

<table>
<thead>
<tr>
<th>Destination type visit combinations</th>
<th>Core Cities / Urban 200k+</th>
<th>Heritage Cities</th>
<th>Coastal Towns</th>
<th>Other towns</th>
<th>Other Rural</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>25%</td>
<td>23%</td>
<td>13%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Core Cities / Urban 200k+</td>
<td>-</td>
<td>12%</td>
<td>8%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Heritage Cities</td>
<td>-</td>
<td>-</td>
<td>8%</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>Coastal Towns</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Other Towns</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>13%</td>
</tr>
</tbody>
</table>
Top English cities/towns stayed in on holiday trips (2010-15)

Source: IPS

<table>
<thead>
<tr>
<th>000s of visitors</th>
<th>Destination Type</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. London</td>
<td>London</td>
<td>7,325</td>
<td>7,616</td>
<td>7,649</td>
<td>8,509</td>
<td>8,914</td>
<td>9,210</td>
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<tr>
<td>2. Manchester</td>
<td>Core City</td>
<td>184</td>
<td>211</td>
<td>215</td>
<td>222</td>
<td>229</td>
<td>268</td>
</tr>
<tr>
<td>3. Brighton</td>
<td>Coastal Town</td>
<td>157</td>
<td>143</td>
<td>167</td>
<td>210</td>
<td>212</td>
<td>211</td>
</tr>
<tr>
<td>4. Bath</td>
<td>Heritage City</td>
<td>159</td>
<td>144</td>
<td>119</td>
<td>176</td>
<td>146</td>
<td>208</td>
</tr>
<tr>
<td>5. Liverpool</td>
<td>Core City</td>
<td>145</td>
<td>188</td>
<td>173</td>
<td>193</td>
<td>222</td>
<td>198</td>
</tr>
<tr>
<td>6. Birmingham</td>
<td>Core City</td>
<td>130</td>
<td>148</td>
<td>116</td>
<td>156</td>
<td>156</td>
<td>180</td>
</tr>
<tr>
<td>7. Oxford</td>
<td>Heritage City</td>
<td>165</td>
<td>181</td>
<td>140</td>
<td>167</td>
<td>193</td>
<td>180</td>
</tr>
<tr>
<td>8. Bristol</td>
<td>Core City</td>
<td>103</td>
<td>141</td>
<td>127</td>
<td>140</td>
<td>120</td>
<td>163</td>
</tr>
<tr>
<td>9. York</td>
<td>Heritage City</td>
<td>124</td>
<td>139</td>
<td>108</td>
<td>150</td>
<td>201</td>
<td>132</td>
</tr>
<tr>
<td>10. Cambridge</td>
<td>Heritage City</td>
<td>128</td>
<td>106</td>
<td>121</td>
<td>126</td>
<td>130</td>
<td>109</td>
</tr>
<tr>
<td>11. Hastings</td>
<td>Coastal Town</td>
<td>49</td>
<td>70</td>
<td>42</td>
<td>46</td>
<td>59</td>
<td>99</td>
</tr>
<tr>
<td>12. Canterbury</td>
<td>Heritage City</td>
<td>96</td>
<td>112</td>
<td>96</td>
<td>99</td>
<td>100</td>
<td>99</td>
</tr>
</tbody>
</table>

NB. IPS measures people who have ‘stayed in’ a town rather than ‘visited’

After London, Manchester attracted the highest number of overseas holiday visitors in 2015, 268,000 in total. This represents an annual increase each year since 2010. Manchester is followed by Brighton, Bath and Liverpool.

Four of the eight core cities are represented within the top 12 individual destinations, along with five heritage cities and two coastal towns.
Top towns stayed in on holiday trips - by region (1)

Source: IPS

<table>
<thead>
<tr>
<th>SOUTH WEST (000s of visitors)</th>
<th>Destination Type</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Bath</td>
<td>Heritage City</td>
<td>159</td>
<td>144</td>
<td>119</td>
<td>176</td>
<td>146</td>
<td>208</td>
</tr>
<tr>
<td>2. Bristol</td>
<td>Core City</td>
<td>103</td>
<td>141</td>
<td>127</td>
<td>140</td>
<td>120</td>
<td>163</td>
</tr>
<tr>
<td>3. Bournemouth</td>
<td>Coastal Town</td>
<td>67</td>
<td>59</td>
<td>71</td>
<td>69</td>
<td>51</td>
<td>68</td>
</tr>
<tr>
<td>4. Exeter</td>
<td>Other Town</td>
<td>52</td>
<td>28</td>
<td>28</td>
<td>48</td>
<td>52</td>
<td>64</td>
</tr>
<tr>
<td>5. Salisbury</td>
<td>Heritage City</td>
<td>50</td>
<td>56</td>
<td>54</td>
<td>80</td>
<td>57</td>
<td>47</td>
</tr>
<tr>
<td>6. Plymouth</td>
<td>Urban 200k+</td>
<td>72</td>
<td>65</td>
<td>63</td>
<td>75</td>
<td>52</td>
<td>44</td>
</tr>
<tr>
<td>7. Torbay</td>
<td>Coastal Town</td>
<td>42</td>
<td>44</td>
<td>35</td>
<td>39</td>
<td>51</td>
<td>36</td>
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<tr>
<td>8. St Ives</td>
<td>Coastal Town</td>
<td>49</td>
<td>41</td>
<td>23</td>
<td>34</td>
<td>34</td>
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<tr>
<td>9. Newquay</td>
<td>Other Town</td>
<td>28</td>
<td>35</td>
<td>28</td>
<td>35</td>
<td>58</td>
<td>34</td>
</tr>
<tr>
<td>10. Penzance</td>
<td>Coastal Town</td>
<td>30</td>
<td>18</td>
<td>32</td>
<td>26</td>
<td>26</td>
<td>34</td>
</tr>
<tr>
<td>11. Falmouth</td>
<td>Other Town</td>
<td>24</td>
<td>14</td>
<td>18</td>
<td>11</td>
<td>12</td>
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<tr>
<td>12. Weymouth</td>
<td>Coastal Town</td>
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<td>25</td>
<td>16</td>
<td>17</td>
<td>11</td>
<td>21</td>
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<tr>
<td>13. Gloucester</td>
<td>Other Town</td>
<td>13</td>
<td>10</td>
<td>4</td>
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</tbody>
</table>

NB. IPS measures people who have ‘stayed in’ a town rather than ‘visited’

N.B. Only towns shown are those recording 20,000 or more visitors in 2015. Generally, numbers within small towns are based on small sample sizes, so should be looked at indicatively i.e. general sizes and trends rather than year-on-year changes.
Top towns stayed in on holiday trips - by region (2)

Source: IPS

<table>
<thead>
<tr>
<th>SOUTH EAST (000s of visitors)</th>
<th>Destination Type</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Brighton</td>
<td>Coastal Town</td>
<td>157</td>
<td>143</td>
<td>167</td>
<td>210</td>
<td>212</td>
<td>211</td>
</tr>
<tr>
<td>2. Oxford</td>
<td>Heritage City</td>
<td>165</td>
<td>181</td>
<td>140</td>
<td>167</td>
<td>193</td>
<td>180</td>
</tr>
<tr>
<td>3. Canterbury</td>
<td>Heritage City</td>
<td>96</td>
<td>112</td>
<td>96</td>
<td>99</td>
<td>100</td>
<td>99</td>
</tr>
<tr>
<td>4. Hastings</td>
<td>Coastal Town</td>
<td>49</td>
<td>70</td>
<td>42</td>
<td>46</td>
<td>59</td>
<td>99</td>
</tr>
<tr>
<td>5. Eastbourne</td>
<td>Coastal Town</td>
<td>54</td>
<td>53</td>
<td>35</td>
<td>51</td>
<td>64</td>
<td>74</td>
</tr>
<tr>
<td>6. Windsor</td>
<td>Other Town</td>
<td>58</td>
<td>80</td>
<td>58</td>
<td>54</td>
<td>77</td>
<td>68</td>
</tr>
<tr>
<td>7. Southampton</td>
<td>Urban 200k+</td>
<td>49</td>
<td>51</td>
<td>47</td>
<td>53</td>
<td>35</td>
<td>66</td>
</tr>
<tr>
<td>8. Portsmouth</td>
<td>Urban 200k+</td>
<td>35</td>
<td>50</td>
<td>29</td>
<td>47</td>
<td>36</td>
<td>53</td>
</tr>
<tr>
<td>9. Reading</td>
<td>Other Town</td>
<td>36</td>
<td>43</td>
<td>46</td>
<td>45</td>
<td>41</td>
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</tr>
<tr>
<td>10. Dover</td>
<td>Coastal Town</td>
<td>45</td>
<td>65</td>
<td>64</td>
<td>54</td>
<td>81</td>
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<td>11. Maidstone</td>
<td>Other Town</td>
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<td>45</td>
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<td>33</td>
<td>31</td>
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<td>12. Folkestone</td>
<td>Coastal Town</td>
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<td>30</td>
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<td>13. Chichester</td>
<td>Coastal Town</td>
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<td>22</td>
<td>18</td>
<td>18</td>
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<td>14. Tunbridge Wells</td>
<td>Other Town</td>
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<td>35</td>
<td>27</td>
<td>22</td>
<td>21</td>
<td>25</td>
</tr>
<tr>
<td>15. Winchester</td>
<td>Other Town</td>
<td>21</td>
<td>40</td>
<td>18</td>
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<td>23</td>
<td>23</td>
</tr>
</tbody>
</table>

NB. IPS measures people who have ‘stayed in’ a town rather than ‘visited’

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## Top towns stayed in on holiday trips - by region (3)

Source: IPS

<table>
<thead>
<tr>
<th>NORTH EAST (000s of visitors)</th>
<th>Destination Type</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Newcastle</td>
<td>Core City</td>
<td>73</td>
<td>86</td>
<td>71</td>
<td>68</td>
<td>80</td>
<td>91</td>
</tr>
<tr>
<td>2. Durham</td>
<td>Heritage City</td>
<td>16</td>
<td>14</td>
<td>18</td>
<td>18</td>
<td>13</td>
<td>24</td>
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</table>

<table>
<thead>
<tr>
<th>NORTH WEST (000s of visitors)</th>
<th>Destination Type</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Manchester</td>
<td>Core City</td>
<td>184</td>
<td>211</td>
<td>215</td>
<td>222</td>
<td>229</td>
<td>268</td>
</tr>
<tr>
<td>2. Liverpool</td>
<td>Core City</td>
<td>145</td>
<td>188</td>
<td>173</td>
<td>193</td>
<td>222</td>
<td>198</td>
</tr>
<tr>
<td>3. Chester</td>
<td>Heritage City</td>
<td>51</td>
<td>54</td>
<td>52</td>
<td>45</td>
<td>39</td>
<td>42</td>
</tr>
<tr>
<td>4. Windermere</td>
<td>Other Rural</td>
<td>26</td>
<td>23</td>
<td>28</td>
<td>34</td>
<td>43</td>
<td>32</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>YORKSHIRE (000s of visitors)</th>
<th>Destination Type</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. York</td>
<td>Heritage City</td>
<td>124</td>
<td>139</td>
<td>108</td>
<td>150</td>
<td>201</td>
<td>132</td>
</tr>
<tr>
<td>2. Leeds</td>
<td>Core City</td>
<td>51</td>
<td>64</td>
<td>59</td>
<td>48</td>
<td>67</td>
<td>60</td>
</tr>
<tr>
<td>3. Sheffield</td>
<td>Core City</td>
<td>30</td>
<td>24</td>
<td>15</td>
<td>20</td>
<td>23</td>
<td>32</td>
</tr>
</tbody>
</table>

NB. IPS measures people who have ‘stayed in’ a town rather than ‘visited’

N.B. Only towns shown are those recording 20,000 or more visitors in 2015. Generally, numbers within small towns are based on small sample sizes, so should be looked at indicatively i.e. general sizes and trends rather than year-on-year changes
# Top towns stayed in on holiday trips - by region (4)

Source: IPS

<table>
<thead>
<tr>
<th>WEST MIDLANDS (000s of visitors)</th>
<th>Destination Type</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Birmingham</td>
<td>Core City</td>
<td>130</td>
<td>148</td>
<td>116</td>
<td>156</td>
<td>156</td>
<td>180</td>
</tr>
<tr>
<td>2. Stratford-upon-Avon</td>
<td>Heritage City</td>
<td>28</td>
<td>72</td>
<td>44</td>
<td>55</td>
<td>73</td>
<td>61</td>
</tr>
<tr>
<td>3. Coventry</td>
<td>Urban 200k+</td>
<td>35</td>
<td>35</td>
<td>22</td>
<td>36</td>
<td>15</td>
<td>27</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EAST MIDLANDS (000s of visitors)</th>
<th>Destination Type</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Nottingham</td>
<td>Core City</td>
<td>48</td>
<td>60</td>
<td>45</td>
<td>49</td>
<td>37</td>
<td>38</td>
</tr>
<tr>
<td>2. Leicester</td>
<td>Urban 200k+</td>
<td>27</td>
<td>25</td>
<td>21</td>
<td>22</td>
<td>19</td>
<td>35</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EAST OF ENGLAND (000s of visitors)</th>
<th>Destination Type</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Cambridge</td>
<td>Heritage City</td>
<td>128</td>
<td>106</td>
<td>121</td>
<td>126</td>
<td>130</td>
<td>109</td>
</tr>
<tr>
<td>2. Norwich</td>
<td>Urban 200k+</td>
<td>26</td>
<td>22</td>
<td>24</td>
<td>23</td>
<td>37</td>
<td>34</td>
</tr>
<tr>
<td>3. Ipswich</td>
<td>Other Town</td>
<td>12</td>
<td>12</td>
<td>15</td>
<td>26</td>
<td>9</td>
<td>20</td>
</tr>
</tbody>
</table>

NB. IPS measures people who have ‘stayed in’ a town rather than ‘visited’

N.B. Only towns shown are those recording 20,000 or more visitors in 2015. Generally, numbers within small towns are based on small sample sizes, so should be looked at indicatively i.e. general sizes and trends rather than year-on-year changes.
What is the origin of England’s holiday visitors by destination type?

Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015
70% of those staying in England on a holiday trip are from Europe. European representation is higher among those staying in destinations outside of London, especially in coastal towns (84%). Coastal towns currently have limited appeal for the North American (6%) or Rest of the World (10%) markets.

Other destination types outside of London have similar representation of European (around two-thirds), North American (10%-14%) and Rest of the World (around a fifth) staying visitors.

North American visitors (20%) are particularly well represented among those staying in UK destinations outside of England.
In more detail, there is a distinctive profile of those staying in coastal towns – 28% are from Germany (much higher than for any other destination type), 13% from France and 9% from the Netherlands. Visitors from the USA (12%) and France (13%) are well represented in heritage cities compared with other destination types.
Source markets for holiday trips in England – by destination type / 2


Holiday visitors from Germany (18%), Netherlands (12%) and Australia (8%) are also well represented among those staying in rural destinations compared with their representation elsewhere.

The USA (16%) and Germany (15%) are also very well represented among those staying in destinations outside of England during their trip.
Source markets for holiday trips in England – volume of visitors/1


Source markets

- Volume (000s) staying in CORE CITIES who are from......
- Volume (000s) staying in URBAN AREAS 200K+ who are from......
- Volume (000s) staying in HERITAGE CITIES who are from......
- Volume (000s) staying in COASTAL TOWNS who are from......
- Volume (000s) staying in OTHER TOWNS who are from......
- Volume (000s) staying RURAL AREAS who are from......
Source markets for holiday trips in England – volume of visitors / 2


Volume (000s) staying in NON-ENGLAND DESTINATIONS who are from:

- France: 166
- Germany: 271
- USA: 284
- Nordics: 134
- Italy: 58
- Spain: 67
- Netherlands: 111
- Australia: 106
- China: 29

Volume (000s) staying in LONDON who are from:

- France: 1070
- Germany: 732
- USA: 940
- Nordics: 912
- Italy: 670
- Spain: 539
- Netherlands: 322
- Australia: 351
- China: 70
How else do England’s holiday visitors vary by destination type?

Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015
Seasonality of holiday stays – by destination type


Overnight holiday stays in any of the destination types outside of London are more likely to take place during the peak July-September period and much less likely to take place in the off-peak October-March period. This is particularly the case for rural destinations, where 50% of those staying do so during the July-September period compared with just 32% among holiday visitors to England overall. These figures are similar for stays in destinations outside of England.

For other destination types outside of London, between 40% and 44% stay during the July-September period compared with 30% in London.
Length of holiday stays in UK – by destination type


<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Total UK</th>
<th>All Engl. Destinations</th>
<th>London</th>
<th>Core Cities</th>
<th>Urban Area 200k+</th>
<th>Heritage Cities</th>
<th>Coastal Towns</th>
<th>Other Towns</th>
<th>Other Rural</th>
<th>Non-England</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of VISITS (2013-2015)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-3 nights</td>
<td>3%</td>
<td>4%</td>
<td>11%</td>
<td>12%</td>
<td>26%</td>
<td>36%</td>
<td>23%</td>
<td>18%</td>
<td>3%</td>
<td>14%</td>
</tr>
<tr>
<td>4-7 nights</td>
<td>19%</td>
<td>22%</td>
<td>23%</td>
<td>27%</td>
<td>35%</td>
<td>40%</td>
<td>30%</td>
<td>30%</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>8-14 nights</td>
<td>40%</td>
<td>40%</td>
<td>40%</td>
<td>31%</td>
<td>42%</td>
<td>50%</td>
<td>46%</td>
<td>44%</td>
<td>32%</td>
<td>39%</td>
</tr>
<tr>
<td>15 or more nights</td>
<td>43%</td>
<td>45%</td>
<td>46%</td>
<td>40%</td>
<td>29%</td>
<td>11%</td>
<td>11%</td>
<td>14%</td>
<td>15%</td>
<td>12%</td>
</tr>
</tbody>
</table>

N.B. Length of stay represents the total number of nights spent IN THE UK by visitors, not the number of nights spent in each destination type

Whilst only 17% of holiday visitors who stay in London during their trip have a total holiday length of more than 7 nights, this greater length of stay is much more common among those who stay outside of London (although many of these will stay in both London and other destinations in England).

Those staying in rural destinations tend to have a particularly extended holiday, with 54% staying for a holiday of more than 7 nights, including 22% who stay at least 15 nights.

Of the other non-London destination types in England, around 40% tend to stay more than 7 nights in total with around 15% staying at least 15 nights. This is slightly higher among those who stay in heritage cities, where 45% stay at least 7 nights in total during their holiday.
### Type of holiday – by destination type

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>% of VISITS (2013-2015)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total UK</td>
<td>18%</td>
</tr>
<tr>
<td>All Engl. Destinations</td>
<td>17%</td>
</tr>
<tr>
<td>London</td>
<td>15%</td>
</tr>
<tr>
<td>Core Cities</td>
<td>13%</td>
</tr>
<tr>
<td>Urban Area 200k+</td>
<td>14%</td>
</tr>
<tr>
<td>Heritage Cities</td>
<td>23%</td>
</tr>
<tr>
<td>Coastal Towns</td>
<td>28%</td>
</tr>
<tr>
<td>Other Towns</td>
<td>20%</td>
</tr>
<tr>
<td>Other Rural</td>
<td>15%</td>
</tr>
<tr>
<td>Non-England</td>
<td>19%</td>
</tr>
</tbody>
</table>


Across holiday trips to England overall, 17% are organised through a package. However, this is much higher among those who stay in coastal towns (28%) and heritage cities (23%) and slightly higher among those who stay in ‘other towns’.
The age profile of holiday visitors to England varies significantly by destination type.

- For holiday visitors staying in London and the other major urban areas (whether core cities or other major urban areas), the age profile is much younger, with typically around 40% aged under 35 years. However, this is particularly the case among visitors to the core cities (44%). There is a low proportion of visitors aged 35-54 years in the major urban areas outside of London.

- Visitor age profile is much older among those staying in heritage cities, coastal towns, other towns and especially, rural areas. Visitors aged over 55 years are much more strongly represented, with as many as 36% of visitors from this age group among those staying in rural areas (only 20% are aged under 35 years here).
Families (visitors with a child aged under 16 in their party) on holiday trips to the UK are more likely to stay in non-London destinations than other types of visitor. For example, 9% of families are staying in a core city during their trip compared with just 7% of visitors overall. The gap between family visitors and visitors overall is similar for each non-London destination type.

Conversely, family visits are slightly less likely to occur to non-England destinations. 13% of family visitors to the UK on a holiday trip stay in non-England destinations compared with 14% of visitors overall.
The type of accommodation stayed in on holiday visits varies significantly by destination type. Within London (73%) and other major urban areas (59%) – especially core cities (63%) – the majority of visitors stay in hotels. There is also a notable proportion of those staying as ‘free guests’ in these major urban areas outside of London.

Although still fairly high within heritage cities (54%), hotel stays are much less common in each of coastal towns (45%), other towns (44%) and rural areas (40%). Stays in B&Bs and camping/caravan sites are still common in both coastal towns and rural areas, with ‘free guests’ high among those staying on ‘other towns’.
Destination Type Summaries
Core Cities - summary

Market Size (annual)
3.7 million overseas visitors (11% of all visitors to UK)
0.9 million holiday visitors (7% of UK holiday visitors)

Most Visited Destinations (2015 holiday visitors only)
- Manchester: 268,000
- Liverpool: 198,000
- Birmingham: 180,000
- Bristol: 163,000
- Newcastle: 91,000
- Leeds: 60,000

Source Markets (holiday)
- Germany: 90,000 (22%)
- USA: 86,000 (10%)
- Nordics: 65,000 (67%)
- Spain: 61,000 (40%)
- France: 62,000 (27%)
- Australia: 46,000 (15%)
- Italy: 35,000 (18%)
- Netherlands: 35,000 (15%)
- China: 17,000 (10%)

Seasonality
- October-December: 18%
- July-September: 40%
- April-June: 27%
- January-March: 15%

Age
- Aged 55 years or over: 20%
- Aged 35-54 years: 37%
- Aged 16-34 years: 44%

Family Visitor Incidence
- All visitors: 7%
- Family visitors: 9%

Accommodation
- Other: 2%
- Free Guest: 16%
- Hostel/Univ/School: 6%
- Rented Accommodation: 5%
- Holiday Village: 5%
- Camping/Caravan: 5%
- B&B: 5%
- Hotel/Guest House: 63%

N.B. All data relates to annual averages 2013-15
Source: International Passenger Survey (2013-15)
Urban Areas (200k+ population)* - summary

**Market Size (annual)**

- 5.4 million overseas visitors (17% of all visitors to UK)
- 1.2 million holiday visitors (9% of UK holiday visitors)

**Most Visited Destinations (2015 holiday visitors only)**
- Manchester: 268,000
- Liverpool: 198,000
- Birmingham: 180,000
- Bristol: 163,000
- Newcastle: 91,000
- Southampton: 66,000

**Source Markets (holiday)**

- Germany: 133,000
- USA: 95,000
- France: 94,000
- Nordics: 83,000
- Spain: 74,000
- Australia: 69,000
- Netherlands: 56,000
- Italy: 46,000
- China: 21,000

**Seasonality**

- October-December: 17%
- July-September: 41%
- April-June: 28%
- January-March: 14%

**Age**

- Aged 55 years or over: 39%
- Aged 35-54 years: 39%
- Aged 16-34 years: 22%

**Family Visitor Incidence**

- All visitors: 9%
- Family visitors: 12%

**Accommodation**

- Hotel/Guest House: 59%
- Rented Accommodation: 4%
- Hostel/Univ/School: 4%
- Camping/Caravan: 4%
- Other: 2%

**N.B.** All data relates to annual averages 2013-15

*Includes Core Cities

Source: International Passenger Survey (2013-15)
Heritage Cities - summary

Market Size (annual)

2.2 million overseas visitors (7% of all visitors to UK)
0.9 million holiday visitors (7% of UK holiday visitors)

Most Visited Destinations (2015 holiday visitors only)

<table>
<thead>
<tr>
<th>Destination</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bath</td>
<td>208,000</td>
</tr>
<tr>
<td>Oxford</td>
<td>180,000</td>
</tr>
<tr>
<td>York</td>
<td>132,000</td>
</tr>
<tr>
<td>Cambridge</td>
<td>109,000</td>
</tr>
<tr>
<td>Canterbury</td>
<td>99,000</td>
</tr>
<tr>
<td>Stratford</td>
<td>61,000</td>
</tr>
</tbody>
</table>

Source Markets (holiday)

<table>
<thead>
<tr>
<th>Country</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>125,000</td>
</tr>
<tr>
<td>France</td>
<td>124,000</td>
</tr>
<tr>
<td>USA</td>
<td>113,000</td>
</tr>
<tr>
<td>Australia</td>
<td>70,000</td>
</tr>
<tr>
<td>Netherlands</td>
<td>64,000</td>
</tr>
<tr>
<td>Nordics</td>
<td>56,000</td>
</tr>
<tr>
<td>Italy</td>
<td>40,000</td>
</tr>
<tr>
<td>Spain</td>
<td>35,000</td>
</tr>
<tr>
<td>China</td>
<td>19,000</td>
</tr>
</tbody>
</table>

Seasonality

- October-December: 15%
- July-September: 43%
- April-June: 32%
- January-March: 10%

Age

- Aged 55 years or over: 41%
- Aged 35-54 years: 40%
- Aged 16-34 years: 29%
- All visitors: 7%
- Family visitors: 9%

Accommodation

- Other: 7%
- Free Guest: 10%
- Hostel/Univ/School: 5%
- Rented Accommodation: 5%
- Holiday Village: 7%
- Camping/Caravan: 8%
- B&B: 54%
- Hotel/Guest House: 7%

N.B. All data relates to annual averages 2013-15

Source: International Passenger Survey (2013-15)
Coastal Towns - summary

**Market Size (annual)**

- **1.6 million overseas visitors** (5% of all visitors to UK)
- **0.7 million holiday visitors** (6% of UK holiday visitors)

**Most Visited Destinations (2015 holiday visitors only)**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brighton</td>
<td>211,000</td>
</tr>
<tr>
<td>Hastings</td>
<td>99,000</td>
</tr>
<tr>
<td>Eastbourne</td>
<td>74,000</td>
</tr>
<tr>
<td>Bournemouth</td>
<td>68,000</td>
</tr>
<tr>
<td>Torbay</td>
<td>36,000</td>
</tr>
<tr>
<td>St. Ives</td>
<td>36,000</td>
</tr>
<tr>
<td>Dover</td>
<td>36,000</td>
</tr>
</tbody>
</table>

**Source Markets (holiday)**

<table>
<thead>
<tr>
<th>Source</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>203,000</td>
</tr>
<tr>
<td>France</td>
<td>96,000</td>
</tr>
<tr>
<td>Netherlands</td>
<td>63,000</td>
</tr>
<tr>
<td>Nordics</td>
<td>50,000</td>
</tr>
<tr>
<td>USA</td>
<td>34,000</td>
</tr>
<tr>
<td>Australia</td>
<td>30,000</td>
</tr>
<tr>
<td>Spain</td>
<td>27,000</td>
</tr>
<tr>
<td>Italy</td>
<td>25,000</td>
</tr>
<tr>
<td>China</td>
<td>5,000</td>
</tr>
<tr>
<td>Rest of the World</td>
<td></td>
</tr>
<tr>
<td>North America</td>
<td></td>
</tr>
<tr>
<td>Europe</td>
<td></td>
</tr>
</tbody>
</table>

**Seasonality**

- October-December: 12%
- July-September: 44%
- April-June: 35%
- January-March: 8%

**Age**

- Aged 55 years or over: 27%
- Aged 35-54 years: 42%
- Aged 16-34 years: 28%

**Family Visitor Incidence**

- All visitors: 6%
- Family visitors: 8%

**Accommodation**

- Other: 11%
- Free Guest: 10%
- Hostel/Univ/School: 6%
- Rented Accommodation: 6%
- Holiday Village: 10%
- Camping/Caravan: 11%
- B&B: 45%
- Hotel/Guest House: 10%

N.B. All data relates to annual averages 2013-15

Source: International Passenger Survey (2013-15)
Other Towns - summary

**Market Size (annual)**

- **5.1 million overseas visitors** (15% of all visitors to UK)
- **1.2 million holiday visitors** (9% of UK holiday visitors)

**Most Visited Destinations (2015 holiday visitors only)**

- Windsor 68,000
- Exeter 64,000
- Reading 37,000
- Newquay 34,000
- Maidstone 31,000
- Falmouth 29,000

**Source Markets (holiday)**

- France 172,000 (17%)
- Germany 163,000 (12%)
- Netherlands 109,000 (12%)
- USA 107,000 (71%)
- Australia 75,000 (41%)
- Nordics 69,000 (31%)
- Italy 51,000 (31%)
- Spain 42,000 (12%)
- China 7,000 (12%)

**Seasonality**

- October-December 16%
- July-September 30%
- April-June 30%
- January-March 14%

**Age**

- Aged 55 years or over 12%
- Aged 35-54 years 28%
- Aged 16-34 years 28%

**Family Visitor Incidence**

- All visitors 9%
- Family visitors 12%

**Accommodation**

- Other 7%
- Free Guest 21%
- Hostel/Univ/School 4%
- Rented Accommodation 4%
- Holiday Village 6%
- Camping/Caravan 3%
- B&B 6%
- Hotel/Guest House 44%

**N.B.** All data relates to annual averages 2013-15

*Source: International Passenger Survey (2013-15)*

Destination Type Summaries
Rural Destinations - summary

Market Size (annual)
- 2.4 million overseas visitors (7% of all visitors to UK)
- 0.8 million holiday visitors (7% of UK holiday visitors)

Most Visited Destinations (2015 holiday visitors only)
N/A

Source Markets (holiday)
- Germany: 152,000
- Netherlands: 104,000
- USA: 85,000
- France: 81,000
- Australia: 68,000
- Nordics: 41,000
- Italy: 27,000
- Spain: 25,000
- China: 7,000

Seasonality
- October-December: 12%
- July-September: 50%
- April-June: 30%
- January-March: 8%

Age
- 55 years or over: 16%
- 35-54 years: 44%
- 16-34 years: 20%

Family Visitor Incidence
- All visitors: 7%
- Family visitors: 9%

Accommodation
- Other: 4%
- Free Guest: 14%
- Hostel/Univ/School: 2%
- Rented Accommodation: 8%
- Holiday Village: 11%
- Camping/Caravan: 12%
- B&B: 40%
- Hotel/Guest House: 40%

N.B. All data relates to annual averages 2013-15
Source: International Passenger Survey (2013-15)
Further information

Jon Young: BDRC Continental:
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Steve Mills: BDRC Continental:
Steve.mills@bdrc-continental.com
Appendix

OTHER TOWNS
Adur/Arun/Chichester/Crawley/Horsham/Mid Sussex
Alnwick
Ashfield/Bassetlaw/Broxtowe/Gedling/Mansfield/Rushcliffe
Ashford/Braintree/Dartford/Gravesham/Maidstone/Medway/Swale/Thanet/Tonbridge & Malling
Aylesbury Vale/Chiltern/Milton Keynes/S Bucks/Wycombe
Barnsley
Basildon/Braintree/Brentwood/Castle Point/Chelmsford/Epping
Forest/Harlow/Maldon/Rochford/Tendring/Thurrock/Uttlesford
Basingstoke and Deane
Bedford
Blackburn with Darwen
Bolton
Braintree/Brentwood/Castle Point/Epping
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