

Multi-Country trips

IPS 2016 analysis

Foresight – issue 155

VisitBritain Research

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Introduction

During 2016, VisitBritain sponsored the following questions on the International Passenger Survey:

During your time away from your home country...

Did you spend at least one night in another country (excluding during transit) before you arrived in the UK?

- Yes
- No

Will you spend at least one night in another country (excluding during transit) after you leave the UK?

- Yes
- No

These questions were asked to all departing passengers who had a stayed in the UK for at least one night.

Summary

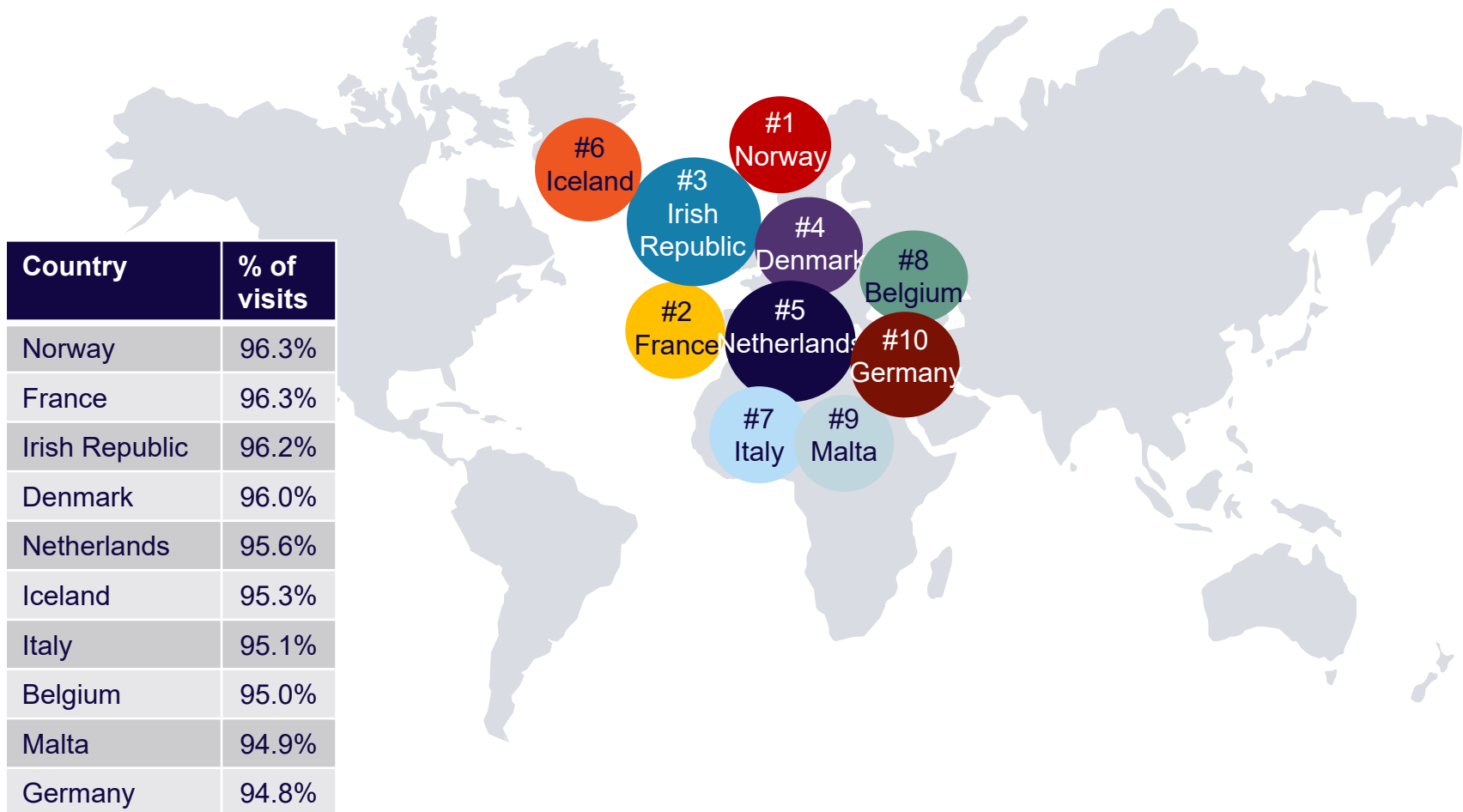
- While the majority of visits to the UK in 2016 did not include a visit to another country in their travel itinerary, 13% did – or 4.5 million visits.
- While the UK average spend per visit among overnight visitors in 2016 was £676, those that included at least another country on their itinerary *before* returning home had an average spend of £698. Average spend was slightly lower for those that visited the UK *after* another country at £681.
- Long haul markets such as Australia, Mexico and Brazil were most likely to include a country before their UK stay.
- The Eastern European countries of Hungary, Romania, Bulgaria and Poland feature in the top 10 markets for those most likely to visit another country both on the way to the UK and after leaving. These visitors are dominated by lorry drivers.
- Multi country visitors were most likely to visit in Q3.
- At 5%, London had the highest proportion of visits that included at least a night's stop over on the way to the UK. The Midlands, both East and West, Yorkshire, the North East and Wales had the highest proportion of visits that had another country stay both on the way to and on the way home.

Top line statistics

	TOTAL UK (overnight visitors only)	Neither before nor after; only visited the UK on this trip	Yes: stayed in another country <u>before</u> arriving in UK	Yes: stayed in another country <u>after</u> leaving the UK	Yes: stayed in another country <u>before</u> and <u>after</u> UK visit
Visits (000)	37,358	29,328	1,426	1,501	1,616
Spend (£m)	£25,259	£19,631	£972	£1,047	£862
Nights (000)	299,687	233,097	9,721	12,450	9,810
Average spend per visit	£676	£669	£681	£698	£533
Average nights per visit	8	8	7	8	6
Average spend per night	£84	£84	£100	£84	£88

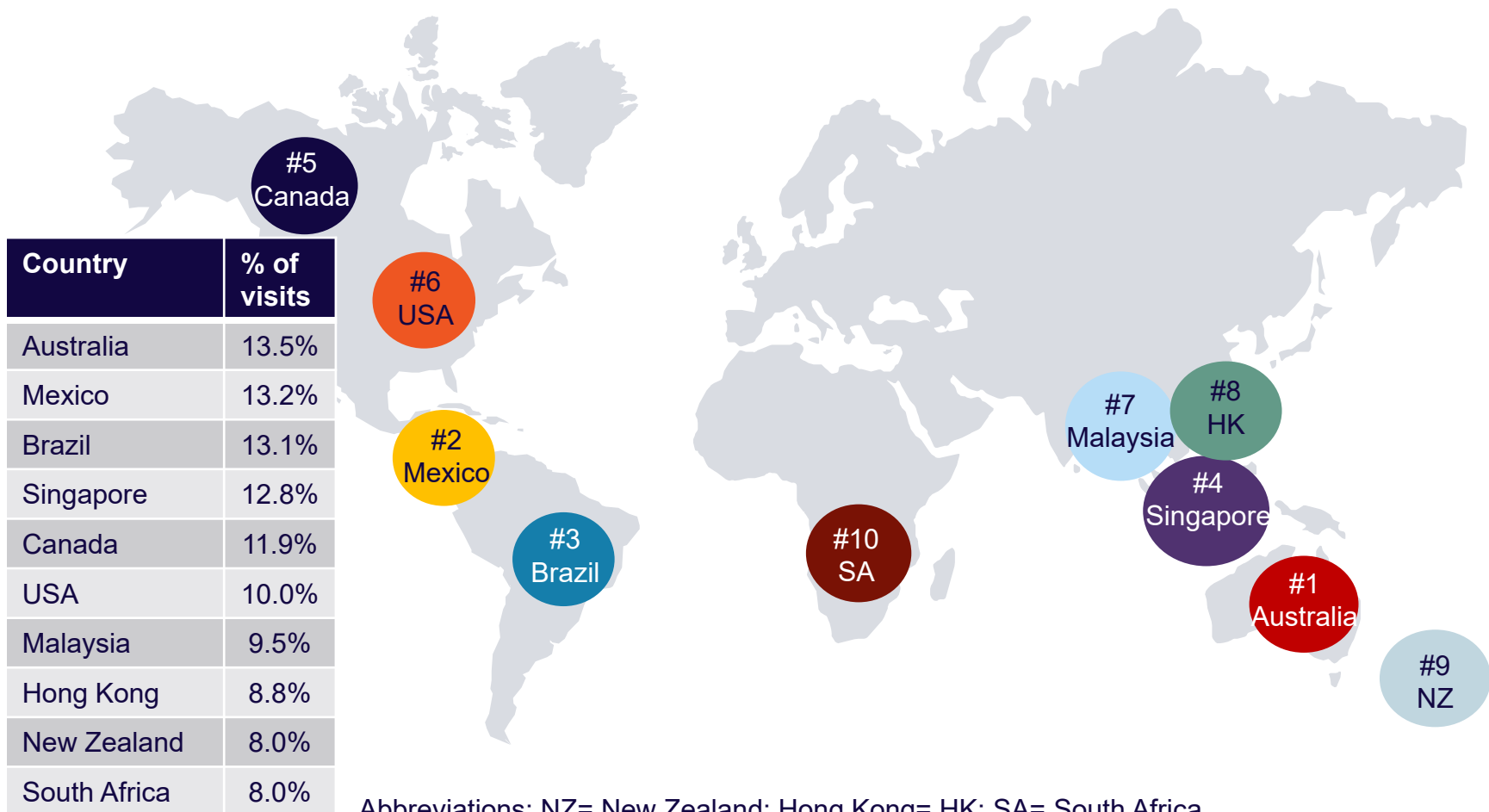
- While the majority of inbound visits to the UK in 2016 did not include an overnight visit to another country before or after their time in the UK, 13% did so.
 - 4% stayed at least 1 night in another country before arriving in the UK
 - 4% were going onto another country after the UK before finally returning home
 - 5% of visits included another country before and after the UK leg of their trip
- Those who were planning a visit to at least another country after the UK and *before* returning home had the highest average spend, while those visiting another country *before* and *after* their UK visit had the lowest average spend

Top markets who visited UK only, no other country before nor after visit



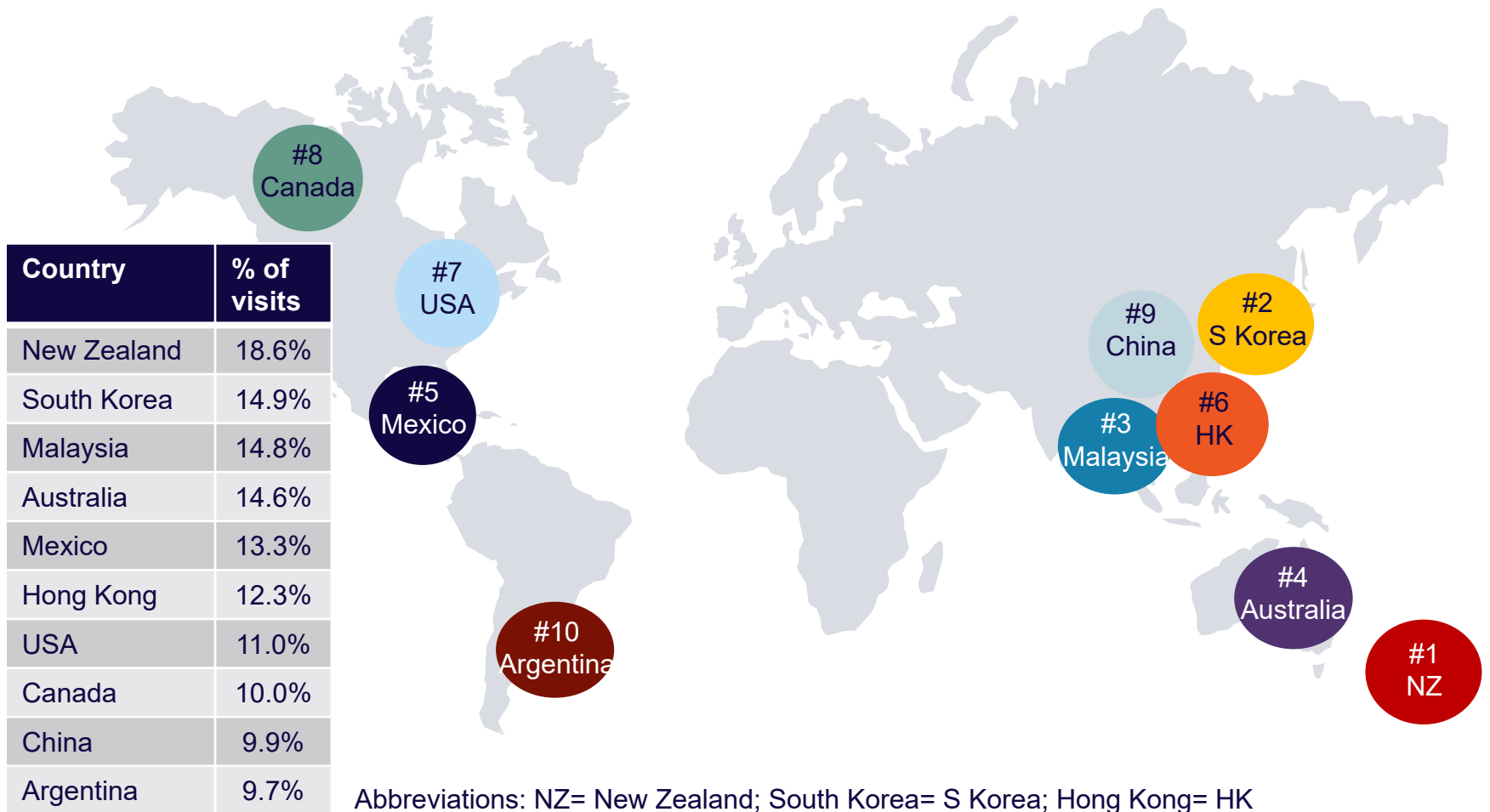
Base: Of those who answered. Where sample >100. Norway 842; France 3,629; Irish Republic 3,083; Denmark 712; Netherlands 2,248; Iceland 114; Italy 1,891; Belgium 988; Malta 109; Germany 3,926

Top markets who included an overnight stay in another country before arriving in the UK



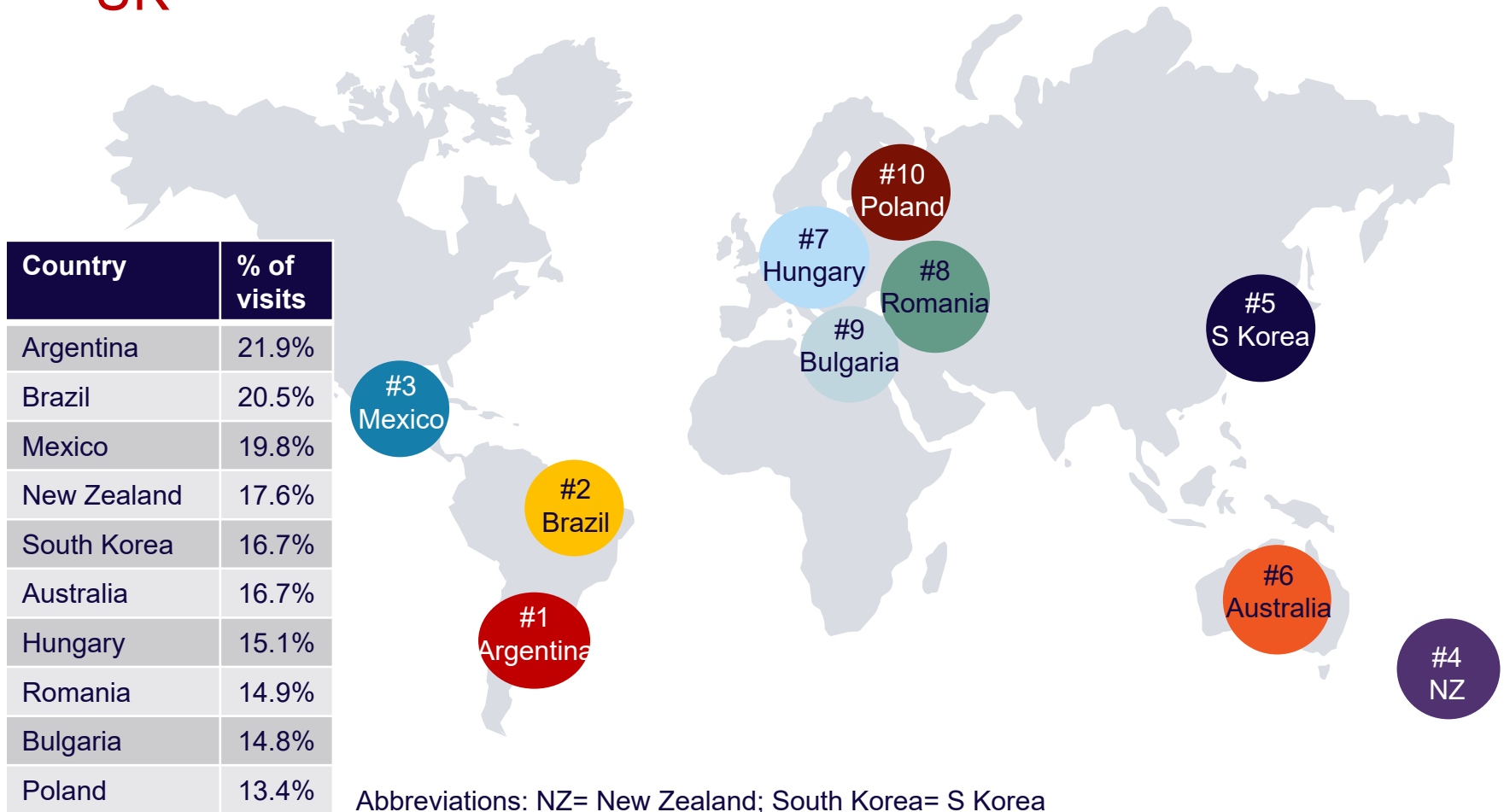
Base: Of those who answered. Where sample >100. Australia 1,500; Mexico 147; Brazil 282; Singapore 304; Canada 1,194; USA 5,497; Malaysia 249; Hong Kong 401; New Zealand 324; South Africa 384

Top markets who included an overnight stay in another country after leaving the UK



Base: Of those who answered. Where sample >100. New Zealand 324; South Korea 203; Malaysia 249; Australia 1,500; Mexico 147; Hong Kong 401; USA 5,497; Canada 1,194; China 409; Argentina 167

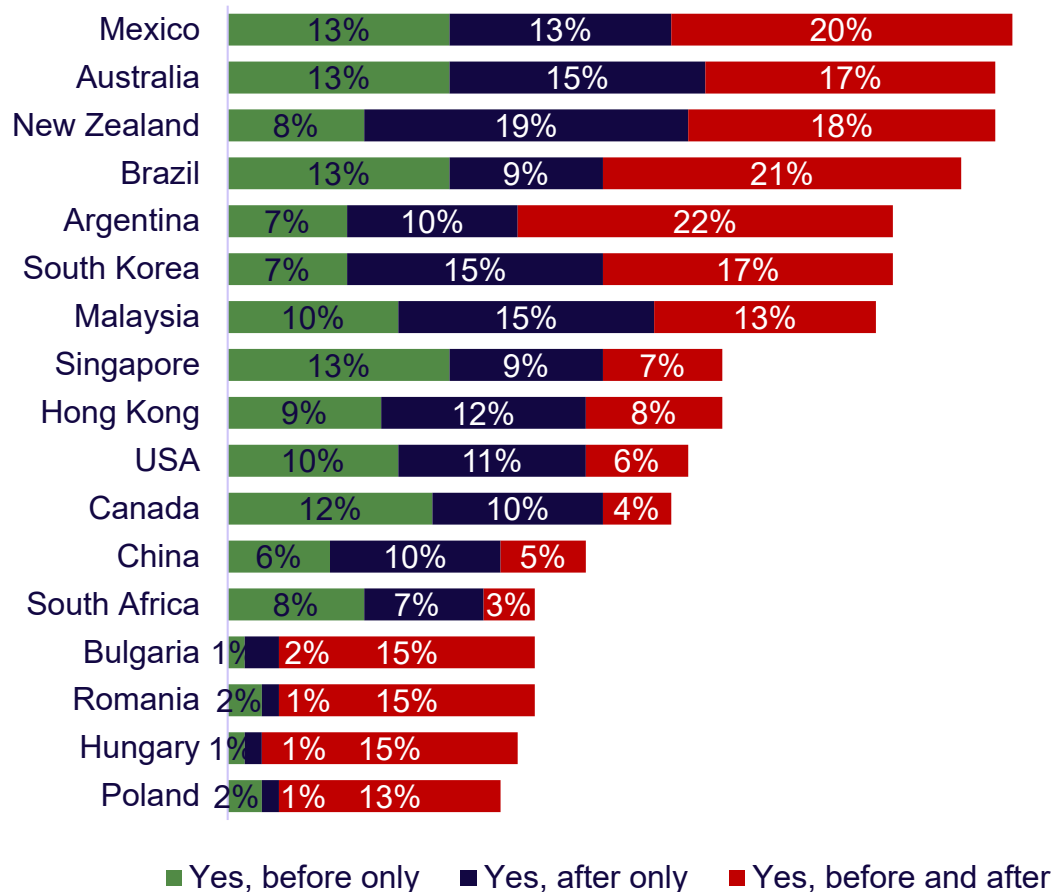
Top markets who included an overnight stay in another country both before arriving in the UK and after leaving the UK



Base: Of those who answered. Where sample >100. Argentina 167; Brazil 282; Mexico 147; New Zealand 324; South Korea 203; Australia 1,500; Hungary 333; Romania 624; Bulgaria 208; Poland 1,546

Proportion of trip with before/after component by market

Countries who are most likely to visit the UK as part of a multi country trip



- Of the markets on the previous slides we can look at the proportion of visitors from individual markets who took overnight visits to other countries before/after their visit to the UK.
- For the top 6 long haul markets here, the highest proportion of visits included another country *before* and *after* the UK – therefore including the UK in a much wider itinerary.
- American and Canadian visitors were more likely to include another country either on the way to or on the way home from the UK.
- Visitors from Eastern Europe had a much higher propensity to include at least a night in another country on the way *to* and *from* the UK.

Europe

Holiday visits

- The vast majority of our near European holidaying neighbours were on UK-only itineraries in 2016.
- If there was more than one country included on their holiday, then this was slightly more likely to be before they arrived in the UK for those from the Irish Republic, Switzerland and Portugal.
- Holiday visitors from Sweden, Switzerland, Belgium and Austria (to a lesser extent) were slightly more likely than other European markets to include another country on their way home, after leaving the UK.
- Poland's statistics clearly show the effect of the lorry drivers seen in the previous slide, as when just looking at holiday visitors far fewer are on a multi-country trip.

Market	Neither before nor after	Yes, before only	Yes, after only	Yes, before and after
France	97%	1%	1%	0%
Germany	96%	2%	1%	1%
Spain	97%	1%	1%	1%
Italy	96%	2%	1%	1%
Irish Republic	96%	3%	1%	0%
Netherlands	97%	2%	1%	1%
Sweden	93%	2%	3%	2%
Switzerland	93%	3%	2%	1%
Belgium	96%	2%	2%	0%
Norway	97%	1%	1%	0%
Denmark	97%	1%	0%	2%
Poland	92%	1%	1%	6%
Austria	95%	1%	2%	2%
Portugal	96%	3%	1%	0%
Finland	95%	2%	1%	1%

Americas and Rest of World

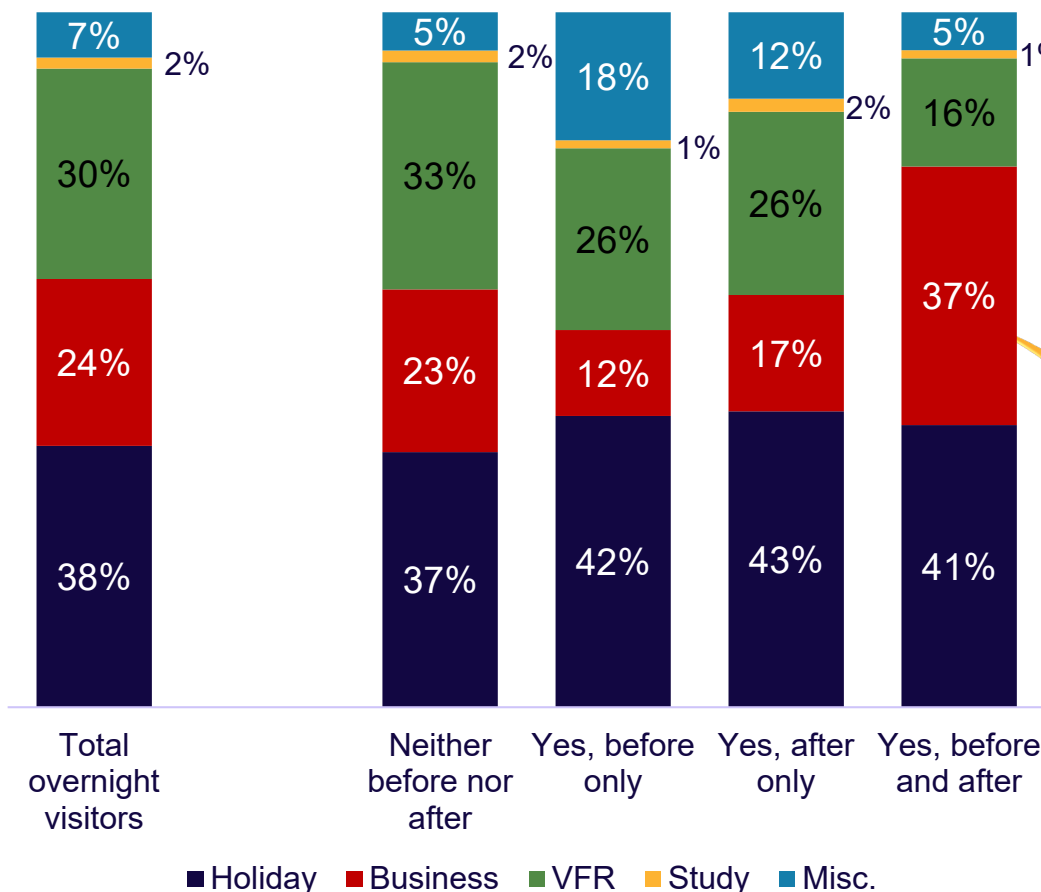
Holiday visits

- Not surprisingly, those visiting the UK from further afield were more likely to include a stay of at least one night in another country along with their holiday to the UK.
- While the majority of holiday visitors from the USA and Canada were on a UK-only trip, around a quarter were stopping for at least a night in another country either on the way to or the way home from the UK, and a few visiting other countries both before and after.
- Those visiting from Brazil were more often sandwiching a UK visit between another country on the way to and on the way home.
- At least 80% of the holiday visitors from the UAE, Saudi Arabia, Qatar and Kuwait were UK-only.
- Nearly a quarter of all holiday visits to the UK from Australia, and almost a third of holiday visits from New Zealand, were part of a larger itinerary including a stay in another country both to and from the UK.

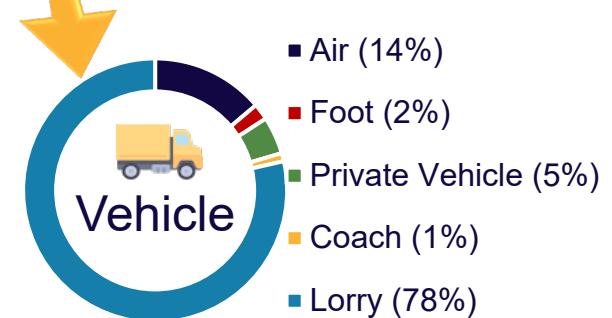
Market	Neither before nor after	Yes, before only	Yes, after only	Yes, before and after
USA	68%	10%	13%	9%
Canada	69%	13%	12%	6%
Brazil	53%	11%	10%	26%

Market	Neither before nor after	Yes, before only	Yes, after only	Yes, before and after
Singapore	60%	18%	11%	11%
Hong Kong	74%	9%	9%	8%
Kuwait	89%	5%	4%	2%
Saudi Arabia	83%	4%	6%	7%
India	67%	8%	13%	13%
UAE	81%	4%	10%	4%
Japan	76%	7%	8%	9%
China	74%	9%	8%	9%
Australia	46%	15%	15%	23%
South Korea	62%	6%	15%	16%
Qatar	88%	3%	9%	0%
New Zealand	42%	3%	27%	28%

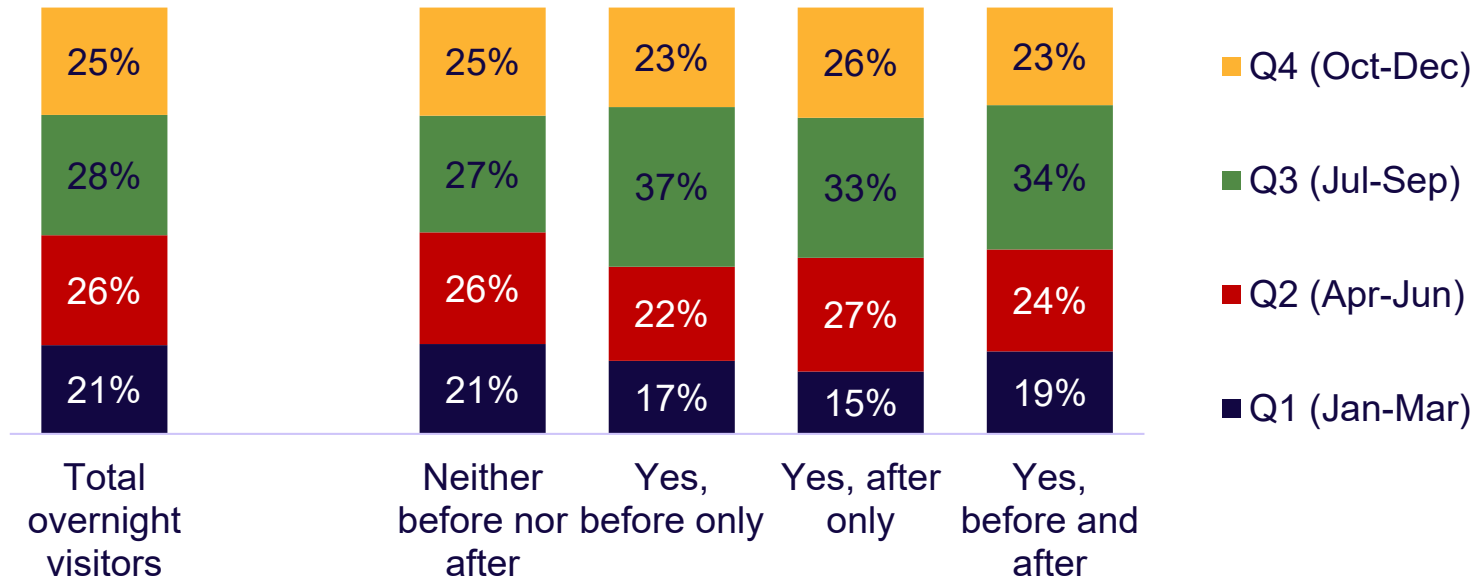
Journey purpose of UK multi-country trips



- Holiday visitors are more likely than the average to include at least 1 night in a country before or after their visit to the UK. The reverse is true for VFR visitors.
- A high proportion of those staying somewhere both *before and after* their UK stay were for business. Further analysis shows many of these were European based lorry drivers delivering and picking up goods in the UK.

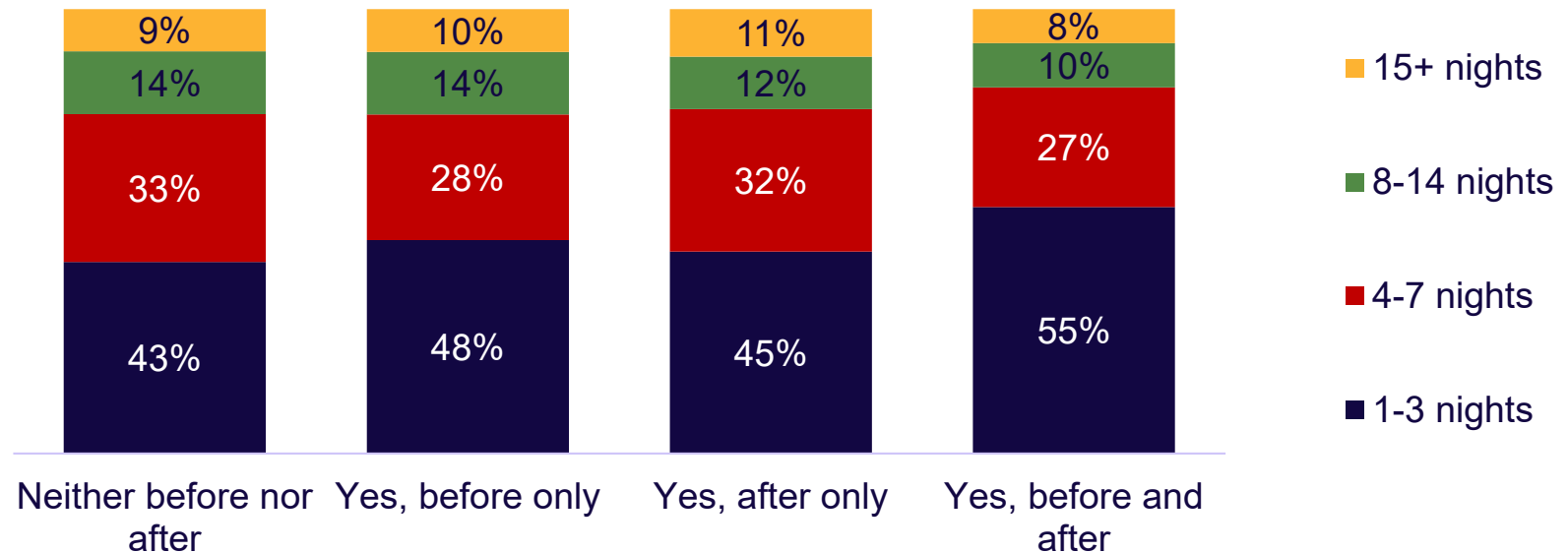


Seasonality of UK multi-country trips



- The summer months of Q3 were the most popular for all visitors particularly those who included a stay in another country before arriving in the UK.
- Q1 was the least popular season for all types of trips.

Duration of UK multi-country trips



- While the highest proportion of those visiting another country en-route to the UK stayed 1-3 nights, 24% of the visits stayed more than 1 week
- Nearly 80% of those who stayed in another country on their way home after visiting the UK visited the UK for less than a week, with 23% staying more than a week.
- Over half of all visitors who included a stay in another country on both their way *to* and *from* the UK were in the UK for 3 or fewer nights.

Multi-country by UK region

- The majority of visits to each area of the UK in 2016 did not include a stay in another country, either on the way to the UK or on the way home.
- London had the highest proportion of visits including a stay in another country on the way to the UK and before heading home along with the South East.
- Including a stay in another country before and after a UK visits was slightly more likely amongst visitors to the East Midlands, West Midlands, Yorkshire the North East, and Wales.



Region	Neither before nor after	Yes, before only	Yes, after only	Yes, before and after
Scotland	95%	2%	1%	1%
Wales	88%	2%	4%	5%
London	85%	5%	5%	4%
North East	91%	3%	1%	5%
North West	92%	1%	3%	4%
Yorkshire	90%	2%	3%	5%
West Midlands	87%	3%	3%	7%
East Midlands	87%	3%	1%	8%
East Of England	89%	4%	3%	4%
South West	92%	2%	2%	4%
South East	87%	4%	5%	4%

Base: Scotland 1,552; Wales 622; London 16,819; North East 338; North West 2,073; Yorkshire 783; West Midlands 1,323; East Midlands 694; East of England 1,526; South West 1,570; South East 3,476. Data refers to first area stayed in

Appendix

- It is possible to find more detail about the UK's inbound visitor statistics by exploring the [Insights & Statistics](#) pages of our website
- The data source for all charts and tables is 2016 **International Passenger Survey (IPS)**, by the **Office for National Statistics (ONS)**
 - The IPS is designed to be representative and statistically robust at national level. Therefore caution should be exercised when interpreting results especially at regional, area and town level.
 - All spend is nominal and excludes the price of getting to the UK
- The icons are all designed by Freepik and distributed by Flaticon



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