Regional Spread of Inbound Tourism
Foresight – issue 164

VisitBritain Research, January 2019
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Introduction

• This report looks at the regional distribution of inbound visitors to the UK during 2017, along with nation spread over the longer term.

• This analysis comes from the International Passenger Survey (IPS) carried out by the Office for National Statistics (ONS) during 2017.

• This report updates the historical Foresight reports on this topic.

• Further information on visitor characteristics and behaviours from the Discover England Fund can be found here: https://www.visitbritain.org/visitor-characteristics-and-behaviour

• Interactive data visualisations and latest regional data can be found on the VisitBritain website: https://www.visitbritain.org/nation-region-county-data https://www.visitbritain.org/latest-quarterly-data-area

• All figures are based on IPS 2017, unless otherwise stated

• All spend is nominal
Summary

• In 2017 the UK welcomed a record 39.2 million inbound visits, 4% more than in 2016. There was also a record £24.5 billion spent in the UK – up 9% on 2016. This report looks at each of the UK regions to see the differences between this national result and those at the regional level.

– **Scotland** saw an increase in both visits and spend in 2017 – both reaching new record levels. The USA – Scotland’s largest and most valuable market – had a 35% increase in visits from 2012-14 to 2015-17, with these visitors spending 47% more.

– After 4 consecutive years of growth, visits to **Wales** in 2017 were flat, but are still up 16% in the 3 years to 2017 (2015-17) compared to the 3 years before (2012-14). Inbound visitor spending to Wales fell 17% in 2017, compared to the spend record set in 2016, but remains up 15% over the longer term 3 years to 2017 (2015-17 compared to 2012-14).

– The **North East** saw a fall in visit numbers in 2017 (1%) while spend fell 42%, compared to the record set last year. Over the past 3 years, the North East has seen a 27% increase in visits and a 30% rise in inbound visitor spending. The top 5 generating markets to the North East have visit growth in the last 3 years (2015-2017), compared to the previous 3 year period.

– **North West** saw visit numbers rise 11% to a record 3.1 million in 2017 – the first time there have been more than 3 million visits to the NW region. Spending too reached record levels of £1.6 billion. The North West’s most valuable market – USA – reported a 29% rise in spend in the last 3 years, setting a new record in 2017 (£143 million).

– The number of visits to **Yorkshire** fell 2% in 2017 but inbound visits between 2015-2017 are 9% higher than the previous 3 year period. Visitors spent £567 million in Yorkshire in 2017. The number 1 market for Yorkshire in the last 3 years in terms of volume and value was the USA. Visits from this market were up 27% in 2017, while sending rose 44% on 2016 results.
Summary

- Inbound visits set new records to the **West Midlands** in 2017. There were 2.3 million visits, with these visitors spending a combined £807 million in the area. While the West Midlands welcomes visitors for a range of purposes, in 2017 they reported the highest proportion of business visits of all regions and nations in this report, with 2 out of every 5 visits to the area being for business.

- Compared to the record visits and spending set in 2016, results for 2017 show negative growth to the **East Midlands**. However, over the longer term 3 years to 2017, visit numbers have risen 24% vs 2012-14, while spending is up 9%. All of the top 5 markets to the East Midlands are in Europe - Poland, Irish Republic, Spain, Germany and France for 2015-17.

- **East of England** visit numbers in 2017 were on par with 2016, but just enough to claim a new visits record, although spend fell 5%. Of all the areas examined in this report the East of England had the highest proportion of visits to friends and relatives in 2017 – 45%.

- Inbound visitor numbers to the **South West** grew 3% to a record 2.6 million in 2017 though spending was down 10%, compared to the record spent in 2016. Inbound visits to the South West are dominated by holiday and those visiting friends and relatives. Between 2015 and 2017 both inbound visits and spend to the South West have grown by 16%, compared to the previous 3 years.

- 2017 was the third consecutive year the **South East** hosted more than 5 million international visits, which rose 2% in 2017, although spend fell slightly by 3%.

- **London** saw a 4% increase in visit numbers in 2017, while spend rose 14%. Both set new records. Over half of the visits to London in 2017 were for holiday.

- As part of the IPS in 2016, VisitBritain asked departing passengers about their day trips – which can be explored to give a fully picture of international tourism at the regional level. A link to this additional report is included on slide 34.
Analysis by UK area – North, South, East and West
Key metrics by UK area 2017

- **Scotland**
  - 3.2m
  - £2.3bn

- **North West**
  - 3.1m
  - £1.6bn

- **West Midlands**
  - 2.3m
  - £807m

- **Wales**
  - 1.1m
  - £369m

- **South West**
  - 2.6m
  - £1.2bn

- **North East**
  - 556,000
  - £241m

- **Yorkshire**
  - 1.3m
  - £567m

- **East Midlands**
  - 1.3m
  - £444m

- **East of England**
  - 2.4m
  - £815m

- **London**
  - 19.8m
  - £13.5bn

- **South East**
  - 5.3m
  - £2.1bn

*Base (2017): Scotland 2,680; Wales 1,092; London 18,638; North East 554; North West 3,114; Yorkshire 1,452; West Midlands 1,916; East Midlands 1,042; East of England 2,123; South West 2,898; South East 4,791*
Average key metrics by UK area 2017

Scotland
Spend per visit: £709
Nights per visit: 8
Spend per night: £93

North West
Spend per visit: £508
Nights per visit: 7
Spend per night: £75

West Midlands
Spend per visit: £348
Nights per visit: 6
Spend per night: £57

Wales
Spend per visit: £342
Nights per visit: 6
Spend per night: £53

South West
Spend per visit: £466
Nights per visit: 8
Spend per night: £58

Yorkshire
Spend per visit: £423
Nights per visit: 8
Spend per night: £55

East Midlands
Spend per visit: £346
Nights per visit: 8
Spend per night: £45

East of England
Spend per visit: £339
Nights per visit: 7
Spend per night: £51

London
Spend per visit: £683
Nights per visit: 6
Spend per night: £119

South East
Spend per visit: £402
Nights per visit: 7
Spend per night: £55

Base (2017): Scotland 2,680; Wales 1,092; London 18,638; North East 554; North West 3,114; Yorkshire 1,452; West Midlands 1,916; East Midlands 1,042; East of England 2,123; South West 2,898; South East 4,791
Scotland

- 2017 saw growth of 17% in visits, to a record 3.2 million.
- Spend rose 23% in 2017, compared to 2016, and set a new annual record of £2.3bn.
- In 2017, 58% of the visits to Scotland were for holiday with visits to friends and relatives (VFR) accounting for 1 in 4 visits.
- Summer (July-Sept) was the most popular season in 2017.

Base (2015-2017): USA 1,341, Germany 1,148, France 398, Australia 624, Netherlands 609

#1 Edinburgh
5.2 million visits

#2 Glasgow
12.1 million visits

#3 Inverness
967,000 visits

#4 Aberdeen
730,000 visits

#5 Fort William
426,000 visits

Base (2015-2017): Edinburgh 4,273; Glasgow 2,626; Inverness 982; Aberdeen 605; Fort William 418
Wales

- 2017 saw visits on par with 2016 levels after 4 consecutive years of growth since 2013.
- Spend fell 17% in 2017 but this is compared to the record set in 2016.
- Holiday visits accounted for 40% of all visits to Wales in 2017, followed by VFR visits at 33%.
- 2/3 of the visits were between April and September in 2017 (Spring and Summer).

Base (2017): 1,092

Base (2015-2017): Irish Republic 442; France 284; Germany 294; USA 359; Netherlands 217

#1 Cardiff
1.1 million visits

#2 Swansea
231,000 visits

#3 Holyhead
168,000 visits

#4 Newport
154,000 visits

#5 Llandudno
89,000 visits

Base (2015-2017): Cardiff 1,247; Swansea 253; Holyhead 109; Newport 171; Llandudno 92
• 2017 saw inbound visits to the North East fall 1% compared to 2016.
• After record spending in 2016, spend fell 42% in 2017 to sit in line with pre 2016 results.
• VFR was the most popular reason to be in the North East in 2017, followed by business.
• The summer quarter was most popular for visits during 2017.

Base (2015-2017): Irish Republic 173; Germany 210; Netherlands 213; USA 161; Spain 82

#1 Newcastle-upon-Tyne
856,000 visits

#2 Durham
189,000 visits

#3 Sunderland
113,000 visits

#4 Middlesbrough
68,000 visits

#5 Berwick-upon-Tweed
61,000 visits

Base (2015-2017): Newcastle-upon-Tyne 894; Durham CO 189; Sunderland 101; Middlesbrough 79; Berwick-upon-Tweed 86
• 2017 North West visit numbers reached a record 3.1 million - the 5th consecutive year of growth.
• Spend rose 38% in 2017 to a record £1.6 billion – the 5th year in a row visitor spending has topped £1 billion.
• VFR was the most popular reason to visit the North West last year followed by holiday.
• Visits were quite evenly spread across the seasons in 2017.

Base (2017): 3,114

Base (2015-2017): Irish Republic 1,076; Germany 851; USA 886; Poland 421; France 454

Base (2015-2017): Manchester 4,252; Liverpool 2,182; Chester 480; Preston 202; Blackpool 212
Yorkshire

- Visits to Yorkshire in 2017 were slightly down on 2016.
- Yorkshire visitor spending jumped 10% to £567 million in 2017; but not quite enough to set a new record.
- Holiday and business visits together accounted for half of all visits in 2017 – though VFR is the most popular journey purpose.
- Summer was the most popular season for visits in 2017.

- **#1 USA**: 352,000 visitors worth £168m
- **#2 Poland**: 348,000 visitors worth £78m
- **#3 Germany**: 335,000 visitors worth £112m
- **#4 Spain**: 254,000 visitors worth £74m
- **#5 France**: 249,000 visitors worth £73m

Base (2015-2017): USA 508; Poland 245; Germany 487; Spain 184; France 237

Base (2015-2017): Leeds 990; York 1,078; Sheffield 557; Bradford 295; Doncaster 270
The West Midlands welcomed a record 2.3 million visits in 2017 – the 5th consecutive year of record breaking visits.

Visitors spent £807 million in 2017, 6% less than the record spent in 2016.

The most popular reason to visit in 2017 was business.

In 2017, visits to the West Midlands were quite evenly spread across the seasons.

- #1 Irish Republic: 851,000 visitors, £243m revenue
- #2 Poland: 721,000 visitors, £88m revenue
- #3 Germany: 585,000 visitors, £177m revenue
- #4 USA: 404,000 visitors, £209m revenue
- #5 France: 400,000 visitors, £122m revenue

Base (2015-2017): Irish Republic 581; Poland 503; Germany 577; USA 542; France 374

#1 Birmingham
3.3 million visits

#2 Coventry
547,000 visits

#3 Stratford-upon-Avon
414,000 visits

#4 Warwick
202,000 visits

#5 Rugby
200,000 visits

Base (2015-2017): Birmingham 2,785; Coventry 510; Stratford-upon-Avon 432; Warwick 222; Rugby 159
East Midlands

• International visits to the East Midlands fell 4% compared to the record set in 2016.

• 2016 was also a record year for inbound spend to the East Midlands; in 2017 spend fell 8%.

• 4 out of every 5 visits to the area in 2016 were to visit friends and relatives or for business.

• July – September were the most popular visit months in 2017.

#1 Poland
- 461,000
- £52m

#2 Irish Republic
- 290,000
- £78m

#3 Spain
- 266,000
- £81m

#4 Germany
- 265,000
- £89m

#5 France
- 237,000
- £103m

Base (2015-2017): Poland 277; Irish Republic 189; Spain 154; Germany 263; France 198

#1 Nottingham
774,000 visits

#2 Leicester
601,000 visits

#3 Northampton
422,000 visits

#4 Derby
322,000 visits

#5 Lincoln
185,000 visits

Base (2015-2017): Nottingham 673; Leicester 566; Northampton 340; Derby 291; Lincoln 196
• Visits in 2017 matched the record set in 2016 – the 2\textsuperscript{nd} consecutive year of record breaking visit levels.

• Inbound visitor spend to the East of England fell 5\% in 2017 (compared to 2016).

• Visiting friends and relatives account for almost half of all visits in 2017.

• Summer and spring were the most popular seasons in 2017.

Base (2015-2017): France 500; Poland 357; Germany 528; USA 792; Irish Republic 436

#1 Cambridge
1.5 million visits

#2 Luton
510,000 visits

#3 Norwich
325,000 visits

#4 St Albans
242,000 visits

#5 Peterborough
233,000 visits

Base (2015-2017): Cambridge 1,412; Luton 372; Norwich 324; St Albans 234; Peterborough 231
South West

• After 3 years of growth, the South West welcomed a record 2.6 million visits in 2017.
• Inbound visitors spent £1.2 billion in the region in 2017, 10% behind the record levels spent in 2016.
• Holiday was most popular reason to visit the South West, followed by visiting friends and relatives.
• The South West saw the most international visitors during the summer last year.

#1 
Germany
962,000
£434m

#2
France
792,000
£247m

#3
USA
599,000
£310m

#4
Spain
495,000
£209m

#5
Netherlands
465,000
£162m

Base (2015-2017): Germany 979; France 787; USA 933; Spain 502; Netherlands 512

#1 Bristol
1.7 million visits

#2 Bath
1.0 million visits

#3 Bournemouth
521,000 visits

#4 Exeter
342,000 visits

#5 Salisbury
292,000 visits

Base (2015-2017): Bristol 1,997; Bath 1,157; Bournemouth 529; Exeter 368; Salisbury 310
South East

- 2017 was the third consecutive year more than 5 million international visits were made to the South East – a new record.
- In each of the last 5 years, visitor spend has been above £2 billion, but was down 3% in 2017.
- While a fifth of visits were for business, VFR was the most popular reason to visit in 2017.
- One third of the visits to the South East were in the summer quarter.

Base (2015-2017): France 1,543; Germany 1,524; USA 1,845; Netherlands 932; Spain 697

#1 Oxford
1.7 million visits

#2 Brighton / Hove
1.4 million visits

#3 Reading
710,000 visits

#4 Southampton
694,000 visits

#5 Windsor
596,000 visits

Base (2015-2017): Oxford 1,778; Brighton / Hove 1,209; Reading 792; Southampton 780; Windsor 758
Spotlight on – London
• London welcomed almost 20 million visits in 2017 – up 4% on 2016 and the 8th straight year of growth.
• Spend too reached record levels in 2017 - £13.5 billion.
• Holiday was the most popular reason to visit London in 2017 – accounting for half of all visits.
• London welcomed visitors in similar proportions throughout the year.

Base (2015-2017): USA 7,320; France 3,531; Germany 3,288; Italy 2,059; Spain 2,081
London - Top 5 markets (2017)
By journey purpose

<table>
<thead>
<tr>
<th>Purpose</th>
<th>USA</th>
<th>France</th>
<th>Germany</th>
<th>Italy</th>
<th>Spain</th>
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<tbody>
<tr>
<td>Holiday</td>
<td>14%</td>
<td>11%</td>
<td>8%</td>
<td>6%</td>
<td>7%</td>
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<tr>
<td>Business</td>
<td>14%</td>
<td>9%</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>VFR</td>
<td>10%</td>
<td>11%</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Study</td>
<td>22%</td>
<td>8%</td>
<td>2%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>21%</td>
<td>6%</td>
<td>6%</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

- The top 5 London visit generating markets (in the last 3 years) contributed almost half (46%) of all holiday visits.
- USA visitors accounted for 14% of all business visits to London in the last 3 years, with the top 5 markets representing 39% during the past 3 years.
- The top 5 markets contributed 55% of all study visits to London in the three years to 2017.
- 1/5 of the London bound study visits were from the USA between 2015 and 2017.

Base (2015-2017): USA 7,320; France 3,531; Germany 3,288; Italy 2,059; Spain 2,081
Day Visits and Day Trippers
Day Visits and Day Trippers

• While understanding where international visitors stay overnight, to complete the picture, we also need to be able to see about day trips – that is where inbound visitors visit, but do not stay overnight.

• During 2016, VisitBritain sponsored 2 questions in the IPS to understand this area in more detail.
  – How many day visits did you take from…(CITY / TOWN)?
  – Which towns were your five most recent day visits made to?

• Due the scale of the data, a separate report has been prepared to explore the day trip data at the regional level and to outline the characteristics of day trippers.

• The report is available on our website here:

  https://www.visitbritain.org/town-data

• This report focuses on day visits to and from the UK’s cities and towns.
Nations Share –
Long Term and Journey Purpose
London has consistently attracted the largest share of visits - though pre 2008 the difference was not as marked as it has been in more recent years.

Since 2010, England (excl London) has held market share of around 42%, while Scotland has held 7%, rising to 8% in 2017.

Wales holds a 3% share of visits, while Northland Ireland holds 1%.
• London’s share of spend has been much more marked – with London’s share not below 50% since 2006.
• England (excl London)’s market share has shown the most variation, ranging from 39% more than 10 years ago to 32% in 2017.
• Scotland has constantly held a 8-9% share of spend while Wales has 2%.
• London held the largest share of UK holiday and Other visits in 2017, while England (excl London) leads the way with the highest share of business, VFR and study visits. The results for spending share are similar although London holds top spot for share of business spending.

• Scotland over-indexes on holiday spend – with a 12% share of holiday visits, and 13% share of holiday spend.
Average spend and length of stay 2017

Journey purpose

• The average UK visit spend was £625 in 2017, but this varied from £486 from a VFR visit to £692 from those in the UK on holiday.

• It is clear that study visitors have a very different profile to the other main purpose categories – driven by a long length of stay.

• Looking at average length of stay, VFR visitors stayed over a week, on average, in 2017, while a business visitor stayed only 4.0 nights.

• The UK average spend per night in 2017 was £86, but it is business visitors who spent the most per night (£152) vs. a VFR visitor typically spending only £50.

<table>
<thead>
<tr>
<th></th>
<th>Holiday</th>
<th>Business</th>
<th>VFR</th>
<th>Study</th>
<th>Other</th>
<th>UK Total</th>
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</thead>
<tbody>
<tr>
<td>AVERAGE SPEND PER VISIT</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>£692</td>
<td>£602</td>
<td>£486</td>
<td>£2,690</td>
<td>£545</td>
<td>£625</td>
<td></td>
</tr>
<tr>
<td>AVERAGE SPEND PER NIGHT</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>£113</td>
<td>£152</td>
<td>£50</td>
<td>£53</td>
<td>£89</td>
<td>£86</td>
<td></td>
</tr>
<tr>
<td>AVERAGE LENGTH OF STAY</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>6.1 nights</td>
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<td>9.7 nights</td>
<td>50.3 nights</td>
<td>6.1 nights</td>
<td>7.3 nights</td>
<td></td>
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</table>
Further resources

VisitBritain regularly publishes up to date inbound research at the UK area level. Below are some recent reports and links to the visualisation on our website for further regional information:

- **Foresight 159: Understanding Welcome**
  (Results from the 2017 NBI survey)
  [https://www.visitbritain.org/britains-welcome](https://www.visitbritain.org/britains-welcome)

- Latest regional statistics

- International Passenger Survey data at region and county level
  [https://www.visitbritain.org/nation-region-county-data](https://www.visitbritain.org/nation-region-county-data)

- UK town visits since 2010
  [https://www.visitbritain.org/town-data](https://www.visitbritain.org/town-data)
Appendix

- It is possible to find more detail about the UK’s inbound visits to our nations and regions, including the latest quarterly data from the International Passenger Survey, by exploring the Insights & Statistics pages of our website.

- The data source for all charts and tables is 2017 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.
  - Because some visitors stay in multiple destinations during their trip the sum of visits to each area will add to more than the total sum of visits to the UK.
  - All spend is nominal and excludes the price of getting to the UK.

- The icons are all designed by Freepik and distributed by Flaticon.
Regional Spread of Inbound Tourism
January 2019