Regional Spread of Inbound Tourism 2019
Foresight – issue 174

VisitBritain Research, August 2020
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Introduction

• This report looks at the regional distribution of inbound visitors to the UK during 2019, along with nation spread over the longer term. It updates the historical Foresight reports on this topic.

• This analysis comes from the International Passenger Survey (IPS) carried out by the Office for National Statistics (ONS) during 2019. All figures are based on IPS 2019, unless otherwise stated.

• Data on the nations, regions and towns inbound visitors to the UK visited refers to where they stayed overnight.

• When ranking popular towns for each region, we have excluded counties from the ranking.

• 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 spend data is in nominal terms.
Summary

• In 2019 the UK welcomed 40.9 million inbound visits, up 1% on 2018. The value of spending also increased by 7% (compared to 2018) to £28.4 billion. This report looks at each of the UK nations and regions to see the differences between this national result and those at the regional level.

– Scotland saw a 7% decline in visits in 2019, but inbound spend was up 7%, setting a new record. The top 4 largest markets remained the same in 2017-2019 compared to 2016-2018 but Australia dropped off, letting the Netherlands in.

– Visits and spend to Wales in 2019 grew by 4% and 19% on 2018 respectively, with spend setting a new record for the region. Visits from Ireland – Wales’ largest inbound market – fell by 13% in 2019 compared to the year before.

– 2019 saw inbound visits to the North East grow 10% compared to 2018. Spend also increased by 6% in 2019, recovering from a slowdown in 2017-2018 and reaching the second highest spend ever. The top 5 generating markets to the North East have remained the same as last year.

– In 2019, the North West saw a 6% and a 4% increase in inbound visits and spending respectively compared to the 2018. Visits set a new record for the region, but spend remains the second highest spending to date. Looking at the inbound markets, the 5 largest remained the same in 2017-2019 compared to 2016-2018.

– Yorkshire visits in 2019 were down 8% on a record 2018 with 1.3 million visits. Spend was also down 2% compared to 2018 with £637 million. The top 5 generating markets in Yorkshire have remained the same as last year.
Summary

– The **West Midlands** welcomed a record 2.4m visits in 2019, up 11% on 2018. Those visitors also spent a record £1.0 billion in 2019, up 9% on 2018 with the region breaking through the £1.0 billion mark for the first time. It boasts the highest proportion of business visits of all main regions and nations, with almost 1 out of every 3 visits to the region being made by business visitors in 2019.

– International visits to the **East Midlands** fell 5% compared to 2018. Inbound spend to this region also saw a decline of 17% in 2019, due to record spending levels in 2018.

– **East of England** visit numbers in 2019 were on par with those in 2018. However, visitors’ spending increased by a large share in 2019, up 36% year-on-year, after 4 consecutive years of decline. In 2017-2019, Spain gained the 5th largest inbound market position for visits to this region from the Irish Republic in 2016-2018.

– International visits to the **South West** in 2019 increased by 4% on 2018, to the second highest figure on record for the region. Similarly, inbound visitors spent 7% more in the region in 2019 than in 2018.

– In 2019, there were 4% more inbound visits to the **South East** than in 2018 – just falling short of the 2017 record. International visitor spending to the South East remained above £2 billion mark in 2019, with record spending levels up 17% on 2018.

– **London** welcomed a record 21.7 million international visits in 2019 – up 3% on 2018. Inbound spend reached £15.7 billion, up 6% on 2018, the second highest spending levels on record for London. Half of the visits to London in 2019 were for holiday.
Analysis by UK area
Key metrics by area in Britain, 2019

<table>
<thead>
<tr>
<th>Area</th>
<th>Visits</th>
<th>Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>3.5m</td>
<td>£2.5bn</td>
</tr>
<tr>
<td>North West</td>
<td>3.4m</td>
<td>£1.6bn</td>
</tr>
<tr>
<td>West Midlands</td>
<td>2.4m</td>
<td>£1.0bn</td>
</tr>
<tr>
<td>Wales</td>
<td>1.0m</td>
<td>£515m</td>
</tr>
<tr>
<td>South West</td>
<td>2.6m</td>
<td>£1.3bn</td>
</tr>
<tr>
<td>North East</td>
<td>538,000</td>
<td>£369m</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>1.3m</td>
<td>£637m</td>
</tr>
<tr>
<td>East Midlands</td>
<td>1.2m</td>
<td>£464m</td>
</tr>
<tr>
<td>East of England</td>
<td>2.3m</td>
<td>£1.0bn</td>
</tr>
<tr>
<td>London</td>
<td>21.7m</td>
<td>£15.7bn</td>
</tr>
<tr>
<td>South East</td>
<td>5.4m</td>
<td>£2.6bn</td>
</tr>
</tbody>
</table>

Base (2019): Scotland 2,544; Wales 926; London 15,079; North East 411; North West 2,595; Yorkshire 1,043; West Midlands 1,699; East Midlands 776; East of England 1,340; South West 2,406; South East 3,634
Average key metrics by UK area 2019

**Scotland**
- Spend per visit: £734
- Nights per visit: 8
- Spend per night: £93

**North West**
- Spend per visit: £470
- Nights per visit: 6
- Spend per night: £80

**Wales**
- Spend per visit: £503
- Nights per visit: 7
- Spend per night: £72

**Yorkshire**
- Spend per visit: £481
- Nights per visit: 8
- Spend per night: £57

**West Midlands**
- Spend per visit: £431
- Nights per visit: 7
- Spend per night: £65

**East Midlands**
- Spend per visit: £385
- Nights per visit: 7
- Spend per night: £55

**North East**
- Spend per visit: £685
- Nights per visit: 9
- Spend per night: £79

**East of England**
- Spend per visit: £452
- Nights per visit: 7
- Spend per night: £63

**London**
- Spend per visit: £724
- Nights per visit: 5
- Spend per night: £132

**South West**
- Spend per visit: £504
- Nights per visit: 8
- Spend per night: £66

**South East**
- Spend per visit: £478
- Nights per visit: 7
- Spend per night: £60

*Base (2019): Scotland 2,544; Wales 926; London 15,079; North East 411; North West 2,595; Yorkshire 1,043; West Midlands 1,699; East Midlands 776; East of England 1,340; South West 2,406; South East 3,634*
Visits declined by 7% in 2019, though, compared to the 2018 record, to the second highest visits, 3.5 million.

Spend grew by 7% in 2019 to a record £2.5bn.

In 2019, 61% of the visits to Scotland were for holiday with visits to friends and relatives (VFR) accounting for 25% of visits.

Summer (July-Sept) was the most popular season with 1 in 3 visits in 2019, followed by spring (Apr-Jun).
Scotland – Top 5 markets (2017 - 2019)

#1 USA
- 1.9m 
- £1.9bn

#2 Germany
- 1.1m 
- £678m

#3 France
- 716,000 
- £434m

#4 Italy
- 557,000 
- £294m

#5 Netherlands
- 506,000 
- £250m

Base (2017-2019): USA 1,405; Germany 927; France 345; Italy 156; Netherlands 617
Scotland – Popular Towns (2017 - 2019)

#1 Edinburgh 6.9 million visits
#2 Glasgow 2.5 million visits
#3 Inverness 917,000 visits
#4 Aberdeen 683,000 visits
#5 Fort William 433,000 visits
#6 Stirling 359,000 visits
#7 St. Andrews 288,000 visits
#8 Perth 254,000 visits

Base (2017-2019): Edinburgh 4,091; Glasgow 2,475; Inverness 734; Aberdeen 527; Fort William 325; Stirling 331; St. Andrews 147; Perth 180
Visits to Wales rose 4% in 2019 to 1.0 million, after a sluggish 2018.

In 2019, spend rose 19% on 2018 spend levels to a record £515 million.

VFR visits accounted for 42% of all visits to Wales in 2019, followed by holiday visits at 39%.

Over 2/3 of the visits were between April and September in 2019 (Spring and Summer).
Wales – Top 5 markets (2017 - 2019)

#1 Irish Republic
492,000
£112m

#2 USA
325,000
£156m

#3 Germany
239,000
£99m

#4 France
219,000
£65m

#5 Netherlands
175,000
£52m

Base (2017-2019): Irish Republic 359; USA 359; Germany 262; France 218; Netherlands 201
Wales – Popular Towns (2017 - 2019)

#1 Cardiff
1.2 million visits

#2 Swansea
234,000 visits

#3 Holyhead
231,000 visits

#4 Newport
122,000 visits

#5 Llandudno
91,000 visits

#6 Aberystwyth
75,000 visits

#7 Conwy
60,000 visits

#8 Wrexham
57,000 visits

Base (2017-2019): Cardiff 1,178; Swansea 237; Holyhead 96; Newport 132; Llandudno 72; Aberystwyth 65; Conwy 57; Wrexham 52
North East

- 2019 saw inbound visits to the North East grow 10% compared to 2018.
- Spend increased by 6% in 2019, recovering on a slowdown in 2017-2018 and reaching the second highest spend ever.
- VFR was the most popular reason to be in the North East in 2019, followed by holiday.
- The summer quarter was most popular for visits during 2019.

Base (2019): 411
North East – Top 5 markets (2017-2019)

<table>
<thead>
<tr>
<th>#</th>
<th>Market</th>
<th>Visitors</th>
<th>Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Irish Republic</td>
<td>163,000</td>
<td>£52m</td>
</tr>
<tr>
<td>2</td>
<td>Germany</td>
<td>146,000</td>
<td>£41m</td>
</tr>
<tr>
<td>3</td>
<td>USA</td>
<td>128,000</td>
<td>£83m</td>
</tr>
<tr>
<td>4</td>
<td>Spain</td>
<td>111,000</td>
<td>£48m</td>
</tr>
<tr>
<td>5</td>
<td>Netherlands</td>
<td>109,000</td>
<td>£41m</td>
</tr>
</tbody>
</table>

Base (2017-2019): Irish Republic 144; Germany 141; USA 140; Spain 72; Netherlands 147
North East – Popular Towns (2017 - 2019)

#1 Newcastle-upon-Tyne
802,000 visits

#2 Durham
173,000 visits

#3 Sunderland
115,000 visits

#4 Middlesbrough
68,000 visits

#5 Berwick-upon-Tweed
60,000 visits

#6 Alnwick
51,000 visits

Base (2017-2019): Newcastle-upon-Tyne 685; Durham CO 146; Sunderland 92; Middlesbrough 61; Berwick-upon-Tweed 57; Alnwick 44
2019 set a new record for visits for the North West with 3.4 million visits, up 6% on 2018.

2019 spend also grew by 4% on 2018, but remained the second best spending to date (behind the 2017 record).

In 2019, VFR and holiday were the most popular journey purposes, each accounted for 34% of visits.

Spring (April-June) and autumn (October-December) were the most popular time to visit the North West with 27% of 2019 visits each.
North West – Top 5 markets (2017 - 2019)

#1 Irish Republic
1.2m
£376m

#2 USA
829,000
£472m

#3 Germany
691,000
£228m

#4 Spain
551,000
£189m

#5 Poland
531,000
£101m

Base (2017-2019): Irish Republic 842; USA 921; Germany 673; Spain 358; Poland 313
North West – Popular Towns (2017 - 2019)

#1 Manchester 4.6 million visits
#2 Liverpool 2.5 million visits
#3 Chester 404,000 visits
#4 Preston 182,000 visits
#5 Blackpool 179,000 visits
#6 Lancaster 158,000 visits
#7 Windermere 150,000 visits
#8 Carlisle 125,000 visits

Base (2017-2019): Manchester 3,968; Liverpool 1,899; Chester 353; Preston 159; Blackpool 154; Lancaster 154; Windermere 137; Carlisle 97
Visits to Yorkshire in 2019 were down by 8%, on a record 2018 to 1.3 million visits.

Yorkshire spending levels were also down by 2% on 2018 to £637 million.

VFR was the most popular journey purpose in 2019 with 42% of visits, followed by holiday (33%).

Summer was the most popular season for visits in 2019 with 1 in 3 visits made in July-September.
Yorkshire – Top 5 markets (2017 - 2019)

#1 USA
371,000
£194m

#2 Poland
346,000
£104m

#3 Irish Republic
278,000
£90m

#4 Germany
274,000
£117m

#5 France
251,000
£82m

Base (2017-2019): USA 449; Poland 220; Irish Republic 201; Germany 340; France 197
Yorkshire – Popular Towns (2017 - 2019)

#1 Leeds
994,000 visits

#2 York
957,000 visits

#3 Sheffield
503,000 visits

#4 Bradford
259,000 visits

#5 Doncaster
239,000 visits

#6 Hull/Kingston-upon-Hull
202,000 visits

#7 Harrogate
193,000 visits

#8 Scarborough
99,000 visits

Base (2017-2019): Leeds 832; York 968; Sheffield 428; Bradford 220; Doncaster 178; Hull/Kingston-upon-Hull 185; Harrogate 177; Scarborough 94
The West Midlands welcomed a record 2.4m visits in 2019, up 11% on 2018.

Visitors spent a record £1.0 billion in 2019, up 9% on 2018, breaking through the £1.0 billion mark for the first time.

The most popular reasons to visit in 2019 was for business (36%) and VFR (36%).

In 2019, there were slightly more visits to the West Midlands in summer than in other seasons.

Base (2019): 1,699
West Midlands – Top 5 markets (2017 - 2019)

#1 Irish Republic
- 868,000
- £250m

#2 Poland
- 623,000
- £91m

#3 Germany
- 543,000
- £215m

#4 USA
- 454,000
- £257m

#5 Romania
- 442,000
- £110m

Base (2017-2019): Irish Republic 535; Poland 365; Germany 447; USA 496; Romania 239
West Midlands – Popular Towns (2017 - 2019)

#1 Birmingham
3.3 million visits

#2 Stratford-upon-Avon
682,000 visits

#3 Coventry
634,000 visits

#4 Warwick
210,000 visits

#5 Rugby
193,000 visits

#6 Wolverhampton
187,000 visits

#7 Solihull
153,000 visits

#8 Worcester
143,000 visits

Base (2017-2019): Birmingham 2,320; Stratford-upon-Avon 450; Coventry 456; Warwick 162; Rugby 123; Wolverhampton 130; Solihull 121; Worcester 122
• Inbound visits to the East Midlands fell 5% compared to 2018.
• Inbound spend to the East Midlands also saw a decline of 17% in 2019, compared to record spending levels in 2018.
• 46% of the visits to the area in 2019 were to visit friends and relatives, and 28% for business.
• July-September is the most popular time to visit with 3 in 10 visits taking place during these months in 2019.
East Midlands – Top 5 markets (2017 - 2019)

#1 Poland 390,000 £59m
#2 Irish Republic 300,000 £71m
#3 Germany 265,000 £86m
#4 USA 263,000 £119m
#5 Spain 236,000 £77m

Base (2017-2019): Poland 196; Irish Republic 153; Germany 202; USA 287; Spain 118
East Midlands – Popular Towns (2017 - 2019)

#1 Nottingham
744,000 visits

#2 Leicester
578,000 visits

#3 Northampton
376,000 visits

#4 Derby
310,000 visits

#5 Lincoln
155,000 visits

#6 Newark-on-Trent
143,000 visits

Base (2017-2019): Nottingham 519; Leicester 408; Northampton 262; Derby 206; Lincoln 124; Newark-on-Trent 50
In 2019, visits were on par with those in 2018 to 2.3 million visits.

Inbound visitor spend to the East of England grew by a large share in 2019, up 36% year-on-year, after 4 consecutive years of decline, but just short of the 2014 record.

Visiting friends and relatives accounted for almost half of all visits to the region in 2019.

Summer was the most popular season in 2019, followed by spring and autumn.

#1 USA 626,000 £316m

#2 France 536,000 £150m

#3 Germany 513,000 £173m

#4 Poland 470,000 £102m

#5 Spain 440,000 £158m

Base (2017-2019): USA 653; France 334; Germany 354; Poland 226; Spain 182

#1 Cambridge
1.6 million visits

#2 Luton
605,000 visits

#3 Norwich
291,000 visits

#4 Peterborough
259,000 visits

#5 St Albans
258,000 visits

#6 Bedford
248,000 visits

#7 Colchester
213,000 visits

#8 Ipswich
177,000 visits

Base (2017-2019): Cambridge 1,014; Luton 329; Norwich 207; Peterborough 166; St Albans 189; Bedford 169; Colchester 163; Ipswich 128
Visits to the South West in 2019 increased 4% on 2018, to the second highest visit figure on record.

Similarly, inbound visitors spent 7% more in the region in 2019, £1.3 billion.

Holiday was most popular reason to visit the South West, followed by visiting friends and relatives.

In 2019, the South West saw the most international visitors during the summer last year.
South West – Top 5 markets (2017 - 2019)

#1 Germany 900,000, £396m
#2 USA 787,000, £436m
#3 France 649,000, £192m
#4 Irish Republic 526,000, £167m
#5 Netherlands 520,000, £195m

Base (2017-2019): Germany 826; USA 917; France 652; Irish Republic 725; Netherlands 534
South West – Popular Towns (2017 - 2019)

#1 Bristol
1.9 million visits

#2 Bath
1.2 million visits

#3 Bournemouth
418,000 visits

#4 Salisbury
370,000 visits

#5 Exeter
314,000 visits

#6 Plymouth
312,000 visits

#7 Cheltenham
213,000 visits

#8 Brixham/Paignton/Torbay/Torquay
178,000 visits

Base (2017-2019): Bristol 2,110; Bath 1,122; Bournemouth 355; Salisbury 286; Exeter 300; Plymouth 281; Cheltenham 217; Brixham/Paignton/Torbay/Torquay 175
In 2019, there were 4% more inbound visits to the South East than in 2018 – just falling short of the 2017 record.

Visitor spend grew by 17% to a record 2.6 billion in 2019.

VFR (39%) and holiday (33%) were the most popular reasons to visit in 2019.

Summer remains the most popular time to visit in 2019.

Base (2019): 3,634
South East – Top 5 markets (2017 - 2019)

#1 USA
1.7m
£883m

#2 Germany
1.5m
£509m

#3 France
1.5m
£440m

#4 Spain
939,000
£287m

#5 Netherlands
935,000
£255m

Base (2017-2019): USA 1,826; Germany 1,142; France 968; Spain 543; Netherlands 747
South East – Popular Towns (2017 - 2019)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Town</th>
<th>Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Oxford</td>
<td>1.8 million</td>
</tr>
<tr>
<td>#2</td>
<td>Brighton / Hove</td>
<td>1.6 million</td>
</tr>
<tr>
<td>#3</td>
<td>Reading</td>
<td>705,000</td>
</tr>
<tr>
<td>#4</td>
<td>Windsor</td>
<td>678,000</td>
</tr>
<tr>
<td>#5</td>
<td>Southampton</td>
<td>669,000</td>
</tr>
<tr>
<td>#6</td>
<td>Canterbury</td>
<td>591,000</td>
</tr>
<tr>
<td>#7</td>
<td>Dover</td>
<td>573,000</td>
</tr>
<tr>
<td>#8</td>
<td>Portsmouth / Southsea</td>
<td>432,000</td>
</tr>
</tbody>
</table>

Base (2017-2019): Oxford 1,413; Brighton / Hove 1,017; Reading 639; Windsor 638; Southampton 611; Canterbury 442; Dover 406; Portsmouth 344
Spotlight on London
London

- Spend reached £15.7 billion, up 6% on 2018, to the second highest spending levels on record.
- Holiday was the most popular reason to visit London in 2019 – accounting for half of all visits.
- London welcomed fewer visitors in the first quarter, and similar proportions of visitors throughout the rest of the year.

#1 USA 9.3m £7.6bn
#2 France 5.6m £2.2bn
#3 Germany 4.4m £1.9bn
#4 Italy 3.8m £1.8bn
#5 Spain 3.6m £1.6bn

Base (2017-2019): USA 10,073; France 3,320; Germany 2,882; Italy 1,501; Spain 1,940
London - Top 5 markets (2019)

By journey purpose

- The top 5 visit generating markets for London (in the last 3 years) contributed to 2 in 5 (44%) of all holiday visits.
- USA visitors accounted for 16% of all business visits to London in the last 3 years, with the top 5 markets representing 40% during the past 3 years.
- The top 5 markets contributed 49% of all study visits to London in the three years to 2019.
- 1 in 5 of the London bound study visits were from the USA between 2017 and 2019.

<table>
<thead>
<tr>
<th>Journey Purpose</th>
<th>USA</th>
<th>France</th>
<th>Germany</th>
<th>Spain</th>
<th>Italy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>15%</td>
<td>9%</td>
<td>7%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Business</td>
<td>16%</td>
<td>8%</td>
<td>7%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>VFR</td>
<td>10%</td>
<td>10%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Study</td>
<td>22%</td>
<td>6%</td>
<td>2%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Other</td>
<td>25%</td>
<td>5%</td>
<td>5%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Base (2017-2019): USA 10,073; France 3,320; Germany 2,882; Italy 1,501; Spain 1,940
Top towns visited in 2019
## Top towns by visits (2019)

<table>
<thead>
<tr>
<th>Towns / cities</th>
<th>Visits (000)</th>
<th>Spend (£m)</th>
<th>Average spend per visit (2019)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2019</td>
<td>Change v 2018</td>
<td>2019</td>
</tr>
<tr>
<td>London</td>
<td>21,713</td>
<td>3%</td>
<td>£15,725</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>2,206</td>
<td>-12%</td>
<td>£1,191</td>
</tr>
<tr>
<td>Manchester</td>
<td>1,661</td>
<td>7%</td>
<td>£715</td>
</tr>
<tr>
<td>Birmingham</td>
<td>1,112</td>
<td>-1%</td>
<td>£367</td>
</tr>
<tr>
<td>Liverpool</td>
<td>845</td>
<td>2%</td>
<td>£397</td>
</tr>
<tr>
<td>Glasgow</td>
<td>771</td>
<td>-13%</td>
<td>£381</td>
</tr>
<tr>
<td>Brighton / Hove</td>
<td>647</td>
<td>35%</td>
<td>£267</td>
</tr>
<tr>
<td>Bristol</td>
<td>636</td>
<td>3%</td>
<td>£279</td>
</tr>
<tr>
<td>Oxford</td>
<td>581</td>
<td>0%</td>
<td>£371</td>
</tr>
<tr>
<td>Cambridge</td>
<td>462</td>
<td>-20%</td>
<td>£245</td>
</tr>
<tr>
<td>Bath</td>
<td>401</td>
<td>7%</td>
<td>£160</td>
</tr>
<tr>
<td>Cardiff</td>
<td>382</td>
<td>2%</td>
<td>£207</td>
</tr>
<tr>
<td>Leeds</td>
<td>338</td>
<td>-4%</td>
<td>£168</td>
</tr>
</tbody>
</table>

*Base (2019): London 15,354; Edinburgh 1,358; Manchester 1,258; Birmingham 755; Liverpool 573; Glasgow 785; Brighton/Hove 342; Bristol 677; Oxford 431; Cambridge 283; Bath 378; Cardiff 367; Leeds 261*
Top towns by visits (2017 - 2019)  
By journey purpose

<table>
<thead>
<tr>
<th>% of all visits to...</th>
<th>Holiday</th>
<th>VFR</th>
<th>Business</th>
<th>Study</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>51%</td>
<td>24%</td>
<td>18%</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>70%</td>
<td>19%</td>
<td>9%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Manchester</td>
<td>32%</td>
<td>27%</td>
<td>26%</td>
<td>2%</td>
<td>12%</td>
</tr>
<tr>
<td>Birmingham</td>
<td>20%</td>
<td>28%</td>
<td>48%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Glasgow</td>
<td>55%</td>
<td>26%</td>
<td>15%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Liverpool</td>
<td>42%</td>
<td>22%</td>
<td>19%</td>
<td>2%</td>
<td>15%</td>
</tr>
<tr>
<td>Bristol</td>
<td>34%</td>
<td>38%</td>
<td>24%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Oxford</td>
<td>42%</td>
<td>27%</td>
<td>21%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Brighton / Hove</td>
<td>47%</td>
<td>36%</td>
<td>9%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Cambridge</td>
<td>40%</td>
<td>29%</td>
<td>21%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Bath</td>
<td>65%</td>
<td>25%</td>
<td>5%</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Cardiff</td>
<td>49%</td>
<td>28%</td>
<td>18%</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Leeds</td>
<td>26%</td>
<td>36%</td>
<td>30%</td>
<td>2%</td>
<td>6%</td>
</tr>
</tbody>
</table>

- Holiday visits accounted for more than 50% of those visiting Edinburgh (70%), Bath (65%), Glasgow (55%) and London (51%) in 2017-2019.
- Business visits made up almost half (48%) of visits to Birmingham.
- Over a third or more of those who visited Bristol, Brighton/Hove and Leeds did so to visit family and friends.

_base (2017-2019): London 48,192; Edinburgh 4,091; Manchester 3,968; Birmingham 2,320; Liverpool 1,899; Glasgow 2,475; Brighton/Hove 1,017; Bristol 2,110; Oxford 1,413; Cambridge 1,014; Bath 1,122; Cardiff 1,178; Leeds 832_
### Top towns by visits (2017 - 2019)

#### By seasonal spread

<table>
<thead>
<tr>
<th>% of all visits to...</th>
<th>Winter Jan-Mar</th>
<th>Spring Apr-Jun</th>
<th>Summer Jul-Sep</th>
<th>Autumn Oct-Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>22%</td>
<td>26%</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>14%</td>
<td>28%</td>
<td>38%</td>
<td>19%</td>
</tr>
<tr>
<td>Manchester</td>
<td>22%</td>
<td>25%</td>
<td>28%</td>
<td>24%</td>
</tr>
<tr>
<td>Birmingham</td>
<td>26%</td>
<td>23%</td>
<td>27%</td>
<td>24%</td>
</tr>
<tr>
<td>Glasgow</td>
<td>15%</td>
<td>27%</td>
<td>37%</td>
<td>20%</td>
</tr>
<tr>
<td>Liverpool</td>
<td>21%</td>
<td>26%</td>
<td>27%</td>
<td>26%</td>
</tr>
<tr>
<td>Bristol</td>
<td>19%</td>
<td>25%</td>
<td>33%</td>
<td>23%</td>
</tr>
<tr>
<td>Oxford</td>
<td>16%</td>
<td>25%</td>
<td>39%</td>
<td>20%</td>
</tr>
<tr>
<td>Brighton / Hove</td>
<td>18%</td>
<td>26%</td>
<td>34%</td>
<td>22%</td>
</tr>
<tr>
<td>Cambridge</td>
<td>19%</td>
<td>22%</td>
<td>37%</td>
<td>22%</td>
</tr>
<tr>
<td>Bath</td>
<td>11%</td>
<td>31%</td>
<td>40%</td>
<td>18%</td>
</tr>
<tr>
<td>Cardiff</td>
<td>15%</td>
<td>29%</td>
<td>37%</td>
<td>18%</td>
</tr>
<tr>
<td>Leeds</td>
<td>25%</td>
<td>25%</td>
<td>29%</td>
<td>21%</td>
</tr>
</tbody>
</table>

- Compared to other towns, Birmingham welcomed visitors in similar proportions throughout the year in 2017-2019, and so did London, Liverpool and Manchester despite fewer visitors in winter.
- Visits to Bath are more seasonal with 4 in 10 happening in the summer. Edinburgh, Glasgow, Cardiff, Oxford and Cambridge also saw over 35% of their inbound visits concentrated in the summer Jul-Sep.
- Leeds and Birmingham are the only towns that attract around 1 in 4 visitors in Winter.

**Base (2017-2019):** London 48,192; Edinburgh 4,091; Manchester 3,968; Birmingham 2,320; Liverpool 1,899; Glasgow 2,475; Brighton/Hove 1,017; Bristol 2,110; Oxford 1,413; Cambridge 1,014; Bath 1,122; Cardiff 1,178; Leeds 832
Nations share of all UK visits –
Long Term and Journey Purpose
London has consistently attracted the largest share of visits – since 2010 it has remained 50% of all visits.

Since 2010, England (excl London) has held market share of around 41%-42%, while Scotland has held 7%-9%.

Wales fell to 2% of all visits to the UK in 2018, while Northern Ireland still held 1%.

*Numbers sum to more than 100% as some visitors go to more than one part of the UK.*
• London’s share of spend dominates – it has not fallen below 50% since 2006.
• England (excl London)’s market share has shown the most variation, ranging from 39% in the early 2000s to 32% in 2019.
• Scotland has constantly held a 7-9% share of spend, while Wales and Northern Ireland maintained their shares (with the exception of 2017 for Wales).
Nation Share 2019

Journey Purpose

- London held the largest share of UK holiday, business and Other visits in 2019, while England (excl London) leads the way with the highest share of VFR and study visits. The results for spending share are similar.

- Scotland over-indexes on holiday and Other spend – 11% share of holiday visits vs 12% of holiday spend, and 3% of Other visits vs 4% of Other spend.
Average spend and length of stay 2019

Journey purpose

- The average UK visit spend was £696 in 2019, but this varies depending on the reason for visiting the UK: on average, those visiting friends and relatives in the UK (VFR) spent £516, but those on a holiday spent £789 whilst in the UK. It is clear that study visitors have a very different profile to the other main purpose categories – driven by longer stays.

- Looking at average length of stay, VFR visitors stayed over a week, on average, in 2019, while a business visitor stayed only 4.2 nights. Overall, inbound visitors spent 7.1 nights on average in the UK in 2019.

- The UK average spend per night in 2019 was £98, with business visitors spending the most per night (£161) while a study/VFR visitor spent only £57.

- It is helpful to keep these variations in mind when reading the following nation share charts.

<table>
<thead>
<tr>
<th>Holiday</th>
<th>Business</th>
<th>VFR</th>
<th>Study</th>
<th>Other</th>
<th>UK Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Average spend per visit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>Business</td>
<td>VFR</td>
<td>Study</td>
<td>Other</td>
<td>UK Total</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Average spend per night</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>Business</td>
<td>VFR</td>
<td>Study</td>
<td>Other</td>
<td>UK Total</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Average length of stay</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Further resources

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

- **Activities undertaken in Britain**
  [https://www.visitbritain.org/activities-undertaken-britain](https://www.visitbritain.org/activities-undertaken-britain)

- **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)

- **Inbound town data**
  [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 2019 International Passenger Survey (IPS), by the Office for National Statistics (ONS).
  • The IPS is designed to be representative and statistically robust at the 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 2019
August 2020