Regional Spread of Inbound Tourism 2018
Foresight – issue 170
VisitBritain Research, July 2019
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Introduction

• This report looks at the regional distribution of inbound visitors to the UK during 2018, 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 2018. All figures are based on IPS 2018, unless otherwise stated.

• Data on the nations, regions and towns inbound visitors to the UK visited refers to where they stayed overnight (page 48 includes a link to a report on inbound day trips).

• 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 2018 the UK welcomed 37.9 million inbound visits, down 3% on the 2017 record. The value of spending also decreased by 7% (compared to 2017) to £22.9 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 10% increase in visits in 2018, setting a new record, but inbound spend was down 3% on 2017’s record. The USA – Scotland’s largest and most valuable market – had a 55% increase in visits from 2011-13 to 2016-18, with these visitors’ spending almost doubling (+93%).

- After 5 consecutive years of growth, visits to **Wales** in 2018 fell 13% on 2017, with visits from Ireland – Wales’ largest inbound market – falling by 27% in 2018 compared to the year before. However, inbound visitor spending to Wales rose 10% in 2018, recovering from a sluggish 2017.

- 2018 saw inbound visits to the **North East** fall 16% compared to 2017. However, spend increased by 21% in 2018, recovering from a slowdown in 2017 and reaching the second highest spend ever. The top 5 generating markets to the North East have remained the same.

- In 2018, the **North West** saw a 3% and a 15% decrease in inbound visits and spending respectively compared to the 2017 record levels. However, both remain the second highest visits and spending on record for the region. Looking at the inbound markets, the 4 largest remained the same in 2016-2018 compared to 2015-2017, but Spain now completes the top 5 (instead of France).

- **Yorkshire** set new records both in inbound visits and spend in 2018 with 1.4 million visits and £604 million spent (up 4% and 6% on 2017 respectively). Spain dropped out of the top 5 markets by volume of visits to this region between 2015-2017 and 2016-2018, allowing the Irish Republic in.
Summary

- The **West Midlands** welcomed 2.1m visits in 2018, down 8% on 2017. However, those visitors spent 4% more than in 2017, with £836 million spent. It boasts the highest proportion of business visits of all main regions and nations, with over 2 out of every 5 visits to the region being for business in 2018.

- International visits to the **East Midlands** fell 2% compared to 2017. But inbound spend to this region reached a new record with £527 million spent there in 2018, up 19% on the year before.

- **East of England** visit numbers in 2018 fell 9% after 2 consecutive years of record-breaking visits. Those visitors’ spending decreased by a larger share in 2018, down 14% year-on-year, the 4th consecutive year of decrease. In 2016-2018, Spain gained the 5th largest inbound market position for visits to this region from the Irish Republic in 2015-2017.

- After a record 2017, international visits to the **South West** in 2018 decreased by 7% year-on-year. Similarly, inbound visitors spent 6% less in the region in 2018 than in 2017.

- In 2018, there were 7% fewer inbound visits to the **South East** than in 2017 – going back down the 5 million international visits mark for the first time since 2014. However, despite being down 6% on 2017, international visitor spending to the South East remained above £2 billion mark in 2018.

- **London** welcomed 19.1 million international visits in 2018 – down 4% on the 2017 record. Inbound spend reached £12.3 billion, down 9% on 2017. 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 48.
Analysis by UK area
Key metrics by area in Britain, 2018

- Scotland: 3.5m (£2.2bn)
- North West: 3.1m (£1.4bn)
- West Midlands: 2.1m (£836m)
- Wales: 941,000 (£405)
- South West: 2.4m (£1.1bn)

- North East: 466,000 (£293m)
- Yorkshire: 1.4m (£604m)
- East Midlands: 1.3m (£527m)
- East of England: 2.2m (£704m)
- London: 19.1m (£12.3bn)
- South East: 4.9m (£2.0bn)

Base (2018): Scotland 2,429; Wales 929; London 14,475; North East 400; North West 2,740; Yorkshire 1,241; West Midlands 1,468; East Midlands 754; East of England 1,263; South West 2,387; South East 3,758
### Average key metrics by UK area 2018

<table>
<thead>
<tr>
<th>Region</th>
<th>Spend per visit</th>
<th>Nights per visit</th>
<th>Spend per night</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>£624</td>
<td>7</td>
<td>£91</td>
</tr>
<tr>
<td>North West</td>
<td>£443</td>
<td>6</td>
<td>£72</td>
</tr>
<tr>
<td>West Midlands</td>
<td>£392</td>
<td>7</td>
<td>£58</td>
</tr>
<tr>
<td>Wales</td>
<td>£430</td>
<td>7</td>
<td>£62</td>
</tr>
<tr>
<td>North East</td>
<td>£628</td>
<td>9</td>
<td>£72</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>£434</td>
<td>7</td>
<td>£62</td>
</tr>
<tr>
<td>East Midlands</td>
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<td>8</td>
<td>£55</td>
</tr>
<tr>
<td>East of England</td>
<td>£320</td>
<td>6</td>
<td>£51</td>
</tr>
<tr>
<td>London</td>
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<td>6</td>
<td>£111</td>
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<tr>
<td>South West</td>
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<td>£56</td>
</tr>
<tr>
<td>South East</td>
<td>£407</td>
<td>6</td>
<td>£67</td>
</tr>
</tbody>
</table>

Base (2018): Scotland 2,429; Wales 929; London 14,475; North East 400; North West 2,740; Yorkshire 1,241; West Midlands 1,468; East Midlands 754; East of England 1,263; South West 2,387; South East 3,758
Scotland

- 2018 saw growth of 10% in visits, to a record 3.5 million.
- Spend fell 3% in 2018 though, compared to the 2017 record, to the second highest spend, £2.2bn.
- In 2018, 56% of the visits to Scotland were for holiday with visits to friends and relatives (VFR) accounting for 28% of visits.
- Summer (July-Sept) was the most popular season with 1 in 3 visits in 2018, followed by spring (Apr-Jun).
Scotland – Top 5 markets (2016 - 2018)

- **#1** USA, 1.5m visits, £1.5bn
- **#2** Germany, 1.2m visits, £743m
- **#3** France, 676,000 visits, £391m
- **#4** Italy, 511,000 visits, £275m
- **#5** Australia, 462,000 visits, £389m

Base (2016-2018): USA 1,348; Germany 1,030; France 358; Italy 176; Australia 585
Scotland – Popular Towns (2016 - 2018)

Base (2016-2018): Edinburgh 4,123; Glasgow 2,531; Inverness 837; Aberdeen 596; Fort William 354; Stirling 354; St. Andrews 170; Oban 260

#1 Edinburgh
6.1 million visits

#2 Glasgow
2.3 million visits

#3 Inverness
965,000 visits

#4 Aberdeen
751,000 visits

#5 Fort William
469,000 visits

#6 Stirling
389,000 visits

#7 St. Andrews
273,000 visits

#8 Oban
241,000 visits
Wales

- In 2018, visits to Wales fell 13% on 2017 visit levels after 5 consecutive years of growth since 2013.
- Spend rose 10% in 2018, after sluggish spend results in 2017.
- Holiday visits accounted for 43% of all visits to Wales in 2018, followed by VFR visits at 36%.
- Over 2/3 of the visits were between April and September in 2018 (Spring and Summer).
Wales – Top 5 markets (2016 - 2018)

Base (2016-2018): Irish Republic 410; Germany 280; USA 335; France 247; Netherlands 206
Wales – Popular Towns (2016 - 2018)

#1 Cardiff
1.1 million visits

#2 Swansea
228,000 visits

#3 Holyhead
218,000 visits

#4 Newport
133,000 visits

#5 Llandudno
91,000 visits

#6 Aberystwyth
84,000 visits

#7 Wrexham
75,000 visits

#8 Tenby
65,000 visits

Base (2016-2018): Cardiff 1,213; Swansea 241; Holyhead 107; Newport 154; Llandudno 89; Aberystwyth 79; Wrexham 69; Tenby 53
• 2018 saw inbound visits to the North East fall 16% compared to 2017.
• However, spend increased by 21% in 2018, recovering on a slowdown in 2017 and reaching the second highest spend ever.
• VFR was the most popular reason to be in the North East in 2018, followed by holiday.
• The summer quarter was most popular for visits during 2018.
North East – Top 5 markets (2016 - 2018)

Base (2016-2018): Irish Republic 151; Germany 177; Netherlands 170; Spain 76; USA 141
North East – Popular Towns (2016 - 2018)

#1 Newcastle-upon-Tyne 807,000 visits

#2 Durham 166,000 visits

#3 Sunderland 131,000 visits

#4 Middlesbrough 67,000 visits

#5 Berwick-upon-Tweed 61,000 visits

#6 Alnwick 43,000 visits

Base (2016-2018): Newcastle-upon-Tyne 786; Durham CO 168; Sunderland 107; Middlesbrough 69; Berwick-upon-Tweed 63; Alnwick 52
Following 2017, the record year for the North West, 2018 was the second highest on record with 3.1 million visits – down 3% after 5 consecutive years of growth.

2018 spend also fell 15% on the record 2017 levels, but remained the second best spending to date.

Just over 1 in 3 visits were for VFR in 2018, closely followed by holiday.

3 in 10 visits in 2018 were made in summer (July-September).
North West – Top 5 markets (2016 - 2018)

Base (2016-2018): Irish Republic 961; USA 881; Germany 740; Poland 355; Spain 399
North West – Popular Towns (2016 - 2018)

- #1 Manchester: 3.9 million visits
- #2 Liverpool: 2.3 million visits
- #3 Chester: 440,000 visits
- #4 Blackpool: 207,000 visits
- #5 Preston: 186,000 visits
- #6 Lancaster: 151,000 visits
- #7 Windermere: 141,000 visits
- #8 Carlisle: 124,000 visits

Base (2016-2018): Manchester 4,086; Liverpool 2,057; Chester 419; Blackpool 208; Preston 173; Lancaster 167; Windermere 176; Carlisle 115
Yorkshire

- Visits to Yorkshire in 2018 were slightly up, by 4%, on 2017 to a new record of 1.4 million visits.
- Yorkshire visitor spending also set a new record with £604 million spent in 2018, up 6% on 2017.
- VFR was the most popular journey purpose in 2018 with 45% of visits, followed by holiday (29%).
- Summer was the most popular season for visits in 2018 with 3 in 10 visits made in July-September.

Base (2018): 1,241
Yorkshire – Top 5 markets (2016 - 2018)

- **#1 Poland**: 403,000 visitors, £82m
- **#2 Germany**: 328,000 visitors, £126m
- **#3 USA**: 327,000 visitors, £169m
- **#4 France**: 262,000 visitors, £92m
- **#5 Irish Republic**: 259,000 visitors, £93m

Base (2016-2018): Poland 243; Germany 420; USA 458; France 228; Irish Republic 224
Yorkshire – Popular Towns (2016 - 2018)

- #1 Leeds: 970,000 visits
- #2 York: 831,000 visits
- #3 Sheffield: 488,000 visits
- #4 Bradford: 296,000 visits
- #5 Doncaster: 244,000 visits
- #6 Hull/Kingston-upon-Hull: 227,000 visits
- #7 Harrogate: 173,000 visits
- #8 Scarborough: 108,000 visits

Base (2016-2018): Leeds 906; York 1,041; Sheffield 493; Bradford 262; Doncaster 196; Hull/Kingston-upon-Hull 230; Harrogate 194; Scarborough 102
West Midlands

- The West Midlands welcomed 2.1m visits in 2018, down 8% on 2017 and after 5 consecutive years of record breaking visits since 2013.
- Visitors spent £836 million in 2018, up 4% on 2017, but still slightly behind the 2016 record.
- The most popular reason to visit in 2018 was business (4 in 10 visits).
- In 2018, there were slightly more visits to the West Midlands in summer than in other seasons.
West Midlands – Top 5 markets (2016 - 2018)

Base (2016-2018): Irish Republic 555; Poland 414; Germany 496; Romania 257; France 350
West Midlands – Popular Towns (2016 - 2018)

#1 Birmingham
3.3 million visits

#2 Coventry
547,000 visits

#3 Stratford-upon-Avon
485,000 visits

#4 Warwick
215,000 visits

#5 Rugby
205,000 visits

#6 Wolverhampton
186,000 visits

#7 Stoke-on-Trent
147,000 visits

#8 Worcester
145,000 visits

Base (2016-2018): Birmingham 2,522; Coventry 462; Stratford-upon-Avon 427; Warwick 206; Rugby 146; Wolverhampton 139; Stoke-on-Trent 149; Worcester 128
• Inbound visits to the East Midlands fell 2% compared to 2017.
• But inbound spend to the East Midlands reached a new record with £527 million in 2018, up 19% on the year before.
• 44% of the visits to the area in 2018 were to visit friends and relatives, and 30% for business.
• July-September is the most popular time to visit with 1 in 3 visits taking place during these months in 2018.
East Midlands – Top 5 markets (2016 - 2018)

- **#1** Poland: 463,000; £71m
- **#2** Irish Republic: 315,000; £81m
- **#3** Germany: 278,000; £95m
- **#4** Spain: 275,000; £93m
- **#5** Romania: 232,000; £47m

Base (2016-2018): Poland 233; Irish Republic 177; Germany 231; Spain 138; Romania 122
East Midlands – Popular Towns (2016 - 2018)

#1 Nottingham 804,000 visits
#2 Leicester 630,000 visits
#3 Northampton 409,000 visits
#4 Derby 321,000 visits
#5 Lincoln 158,000 visits
#6 Newark-on-Trent 60,000 visits

Base (2016-2018): Nottingham 623; Leicester 490; Northampton 294; Derby 249; Lincoln 141; Newark 51
East of England

- After 2 consecutive record-breaking years, visits fell 9% in 2018 compared to 2017.
- Inbound visitor spend to the East of England fell by a larger share in 2018, down 14% year-on-year, the 4th consecutive year of decline.
- Visiting friends and relatives accounted for over 4 in 10 visits to the region in 2018.
- Summer then spring were the most popular seasons in 2018.

Base (2016-2018): Poland 314; France 434; USA 730; Germany 439; Spain 242

1. Cambridge – 1.6 million visits
2. Luton – 582,000 visits
3. Norwich – 298,000 visits
4. Bedford – 256,000 visits
5. St Albans – 244,000 visits
6. Peterborough – 243,000 visits
7. Ipswich – 220,000 visits
8. Colchester – 217,000 visits

Base (2016-2018): Cambridge 1,244; Luton 349; Norwich 254; Bedford 193; St Albans 212; Peterborough 201; Ipswich 170; Colchester 197
South West

- After a record 2017, visits to the South West in 2018 decreased by 7% year-on-year.
- Similarly, inbound visitors spent 6% less in the region in 2018, £1.1 billion.
- Holiday was most popular reason to visit the South West, followed by visiting friends and relatives.
- In 2018, the South West saw the most international visitors during the summer last year.
South West – Top 5 markets (2016 - 2018)

Base (2016-2018): Germany 945; France 712; USA 910; Netherlands 532; Spain 503
### South West – Popular Towns (2016 - 2018)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Town</th>
<th>Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Bristol</td>
<td>1.8 million</td>
</tr>
<tr>
<td>2</td>
<td>Bath</td>
<td>1.0 million</td>
</tr>
<tr>
<td>3</td>
<td>Bournemouth</td>
<td>462,000 visits</td>
</tr>
<tr>
<td>4</td>
<td>Salisbury</td>
<td>340,000 visits</td>
</tr>
<tr>
<td>5</td>
<td>Exeter</td>
<td>326,000 visits</td>
</tr>
<tr>
<td>6</td>
<td>Plymouth</td>
<td>297,000 visits</td>
</tr>
<tr>
<td>7</td>
<td>Cheltenham</td>
<td>233,000 visits</td>
</tr>
<tr>
<td>8</td>
<td>Gloucester</td>
<td>170,000 visits</td>
</tr>
</tbody>
</table>

Base (2016-2018): Bristol 2,100; Bath 1,125; Bournemouth 439; Exeter 333; Salisbury 302; Exeter 333; Plymouth 291; Cheltenham 260; Gloucester 182
South East

- In 2018, there were 7% fewer inbound visits to the South East than in 2017 – falling below the 5 million international visits mark for the first time since 2014.
- However, despite falling 6% on 2017, visitor spend remained above £2 billion in 2018.
- VFR and holiday were the most popular reasons to visit in 2018.
- Summer remains the most popular time to visit in 2018.

Base (2018): 3,758
South East – Top 5 markets (2016 - 2018)

Base (2016-2018): France 1,245; Germany 1,320; USA 1,791; Spain 635; Netherlands 827
South East – Popular Towns (2016 - 2018)

Base (2016-2018): Oxford 1,586; Brighton / Hove 1,074; Reading 724; Southampton 680; Dover 430; Windsor 689; Canterbury 474; Portsmouth 382
Spotlight on London
London

- Spend reached £12.3 billion, down 9% on 2017, the record-holder.
- Holiday was the most popular reason to visit London in 2018 – accounting for half of all visits.
- London welcomed fewer visitors the first quarters, and similar proportions of visitors throughout the rest of the year.

Base (2016-2018): USA 9,822; France 3,887; Germany 3,626; Spain 2,341; Italy 2,053
London - Top 5 markets (2018)
By journey purpose

- The top 5 visit generating markets for London (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 40% during the past 3 years.
- The top 5 markets contributed 52% of all study visits to London in the three years to 2018.
- 1/5 of the London bound study visits were from the USA between 2016 and 2018.

<table>
<thead>
<tr>
<th>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>13%</td>
<td>11%</td>
<td>8%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Business</td>
<td>14%</td>
<td>9%</td>
<td>8%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>VFR</td>
<td>9%</td>
<td>11%</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Study</td>
<td>21%</td>
<td>8%</td>
<td>3%</td>
<td>7%</td>
<td>13%</td>
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<tr>
<td>Other</td>
<td>21%</td>
<td>6%</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
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</tbody>
</table>

Base (2016-2018): USA 9,822; France 3,887; Germany 3,626; Italy 2,053; Spain 2,341
Top towns visited in 2018
## Top towns (2018)

<table>
<thead>
<tr>
<th>Towns / cities</th>
<th>Visits (000)</th>
<th>Spend (£m)</th>
<th>Average spend per visit (2018)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2018</td>
<td>Change v 2017</td>
<td>2018</td>
</tr>
<tr>
<td>London</td>
<td>19,090</td>
<td>-4%</td>
<td>£12,329</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>2,362</td>
<td>17%</td>
<td>£1,081</td>
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<tr>
<td>Manchester</td>
<td>1,408</td>
<td>7%</td>
<td>£617</td>
</tr>
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<td>Birmingham</td>
<td>1,100</td>
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<td>£367</td>
</tr>
<tr>
<td>Glasgow</td>
<td>837</td>
<td>6%</td>
<td>£351</td>
</tr>
<tr>
<td>Liverpool</td>
<td>803</td>
<td>-4%</td>
<td>£320</td>
</tr>
<tr>
<td>Bristol</td>
<td>598</td>
<td>-1%</td>
<td>£204</td>
</tr>
<tr>
<td>Cambridge</td>
<td>547</td>
<td>5%</td>
<td>£181</td>
</tr>
<tr>
<td>Oxford</td>
<td>526</td>
<td>-2%</td>
<td>£252</td>
</tr>
<tr>
<td>Brighton / Hove</td>
<td>459</td>
<td>-6%</td>
<td>£222</td>
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<td>Bath</td>
<td>348</td>
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<td>Leeds</td>
<td>344</td>
<td>17%</td>
<td>£179</td>
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<tr>
<td>Cardiff</td>
<td>342</td>
<td>-8%</td>
<td>£133</td>
</tr>
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</table>

Base (2018): London 14,475; Edinburgh 1,285; Manchester 1,335; Birmingham 698; Glasgow 812; Liverpool 593; Bristol 712; Cambridge 273; Oxford 440; Brighton/Hove 293; Bath 334; Leeds 269; Cardiff 391
Top towns (2016 - 2018)
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>50%</td>
<td>25%</td>
<td>18%</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>68%</td>
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<td>1%</td>
<td>1%</td>
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<tr>
<td>Manchester</td>
<td>27%</td>
<td>27%</td>
<td>30%</td>
<td>1%</td>
<td>14%</td>
</tr>
<tr>
<td>Birmingham</td>
<td>17%</td>
<td>27%</td>
<td>52%</td>
<td>1%</td>
<td>3%</td>
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<tr>
<td>Glasgow</td>
<td>54%</td>
<td>26%</td>
<td>17%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Liverpool</td>
<td>38%</td>
<td>21%</td>
<td>24%</td>
<td>2%</td>
<td>16%</td>
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<tr>
<td>Bristol</td>
<td>31%</td>
<td>37%</td>
<td>28%</td>
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<td>2%</td>
</tr>
<tr>
<td>Cambridge</td>
<td>37%</td>
<td>30%</td>
<td>25%</td>
<td>5%</td>
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<td>Oxford</td>
<td>41%</td>
<td>29%</td>
<td>21%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Brighton / Hove</td>
<td>45%</td>
<td>36%</td>
<td>9%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Bath</td>
<td>64%</td>
<td>27%</td>
<td>5%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Leeds</td>
<td>21%</td>
<td>39%</td>
<td>34%</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Cardiff</td>
<td>47%</td>
<td>27%</td>
<td>21%</td>
<td>1%</td>
<td>4%</td>
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</tbody>
</table>

- Holiday visits accounted for more than 50% of those visiting Edinburgh (68%), Bath (64%), Glasgow (54%) and London (50%) in 2018.
- Business visits made up over half (52%) of visits to Birmingham.
- 30% or more of those who visited Cambridge, Brighton/Hove, Bristol and Leeds did so to visit family and friends.

Base (2016-2018): London 52,913; Edinburgh 4,123; Manchester 4,086; Birmingham 2,522; Glasgow 2,531; Liverpool 2,057; Bristol 2,100; Cambridge 1,244; Oxford 1,586; Brighton/Hove 1,074; Bath 1,125; Leeds 906; Cardiff 1,213
Top towns (2016 - 2018)
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>21%</td>
<td>27%</td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>15%</td>
<td>29%</td>
<td>39%</td>
<td>17%</td>
</tr>
<tr>
<td>Manchester</td>
<td>22%</td>
<td>25%</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>Birmingham</td>
<td>24%</td>
<td>23%</td>
<td>27%</td>
<td>26%</td>
</tr>
<tr>
<td>Glasgow</td>
<td>16%</td>
<td>26%</td>
<td>39%</td>
<td>18%</td>
</tr>
<tr>
<td>Liverpool</td>
<td>21%</td>
<td>26%</td>
<td>30%</td>
<td>23%</td>
</tr>
<tr>
<td>Bristol</td>
<td>19%</td>
<td>27%</td>
<td>32%</td>
<td>22%</td>
</tr>
<tr>
<td>Cambridge</td>
<td>19%</td>
<td>23%</td>
<td>36%</td>
<td>22%</td>
</tr>
<tr>
<td>Oxford</td>
<td>15%</td>
<td>27%</td>
<td>37%</td>
<td>21%</td>
</tr>
<tr>
<td>Brighton / Hove</td>
<td>15%</td>
<td>28%</td>
<td>34%</td>
<td>23%</td>
</tr>
<tr>
<td>Bath</td>
<td>11%</td>
<td>28%</td>
<td>43%</td>
<td>18%</td>
</tr>
<tr>
<td>Leeds</td>
<td>24%</td>
<td>25%</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>Cardiff</td>
<td>16%</td>
<td>30%</td>
<td>37%</td>
<td>17%</td>
</tr>
</tbody>
</table>

- Birmingham welcomed visitors in similar proportions throughout the year in 2016-2018, and so did London and Manchester despite fewer visitors in winter.
- Visits to Bath are more seasonal with over 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.
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 visits, 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, which focuses on day visits to and from the UK’s cities and towns, is available on our website here:

  https://www.visitbritain.org/town-data
Nations share of all UK visits –
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 41%-42%, while Scotland has held 7%-8%, rising to 9% in 2018.

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% more than 10 years ago to 32% in 2017 (33% in 2018).

Scotland has constantly held a 8-9% share of spend, but rose to 10% in 2018, while Wales and Northern Ireland maintained their shares.
London held the largest share of UK holiday and Other visits in 2018, 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 England (excl London) only holds top spot for share of VFR spending.

Scotland over-indexes on holiday and Other spend – 12% share of holiday visits vs 13% of holiday spend, and 2% of Other visits vs 3% of Other spend.
Average spend and length of stay 2018

Journey purpose

- The average UK visit spend was £604 in 2018, but this varies depending on the reason for visiting the UK: on average, £482 for a VFR visit, but £685 for a holiday trip for example. 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 2018, while a business visitor stayed only 4.1 nights. Overall, inbound visitors spent 7.0 nights on average in the UK in 2018.

- The UK average spend per night in 2018 was £86, with business visitors spending the most per night (£131) while a study visitor spent only £48.

<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></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AVERAGE SPEND PER VISIT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>£685</td>
<td>£534</td>
<td>£482</td>
<td>£2,399</td>
<td>£541</td>
<td>£604</td>
</tr>
<tr>
<td>AVERAGE SPEND PER NIGHT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>£118</td>
<td>£131</td>
<td>£52</td>
<td>£48</td>
<td>£109</td>
<td>£86</td>
</tr>
<tr>
<td>AVERAGE LENGTH OF STAY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.8 nights</td>
<td>4.1 nights</td>
<td>9.3 nights</td>
<td>50.2 nights</td>
<td>5.0 nights</td>
<td>7.0 nights</td>
</tr>
</tbody>
</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 visualisations on our website for further regional information:

<table>
<thead>
<tr>
<th>Category</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities undertaken in Britain</td>
<td><a href="https://www.visitbritain.org/activities-undertaken-britain">https://www.visitbritain.org/activities-undertaken-britain</a></td>
</tr>
<tr>
<td>International Passenger Survey data at region and county level</td>
<td><a href="https://www.visitbritain.org/nation-region-county-data">https://www.visitbritain.org/nation-region-county-data</a></td>
</tr>
<tr>
<td>Inbound town data</td>
<td><a href="https://www.visitbritain.org/town-data">https://www.visitbritain.org/town-data</a></td>
</tr>
</tbody>
</table>
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 2018 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 2018
July 2019