

# Discover England: summary insights on overseas visitors to England's regions

Multi-destinations report: a profile of overseas visitors who stay in more than one destination during their trip

February 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.

## Definitions

For the purposes of this report, a **multi-destination visitor** is defined as an overseas visitor who, on their trip, has either:

1. Stayed at least one night in both London and another destination in the UK.
2. Stayed at least one night in two or more different destinations in the UK which are outside London.

*N.B. Visitors staying in more than one destination within London are not classified as multi-destination visitors*

Within this report, multi-destination visitors are broken down further as follows:

### **London Plus visitors**

- London Plus (UK) - a visitor who stayed in both London and at least one other destination in the *UK* for at least one night
- London Plus (ENG) - a visitor who stayed in both London and at least one other destination in *England* for at least one night

### **Non-London multi-destination visitors**

- Multi-destination non-London (UK) – a visitor who stayed for at least one night in two or more destinations in the *UK*, but did NOT stay in London
- Multi-destination non-London (ENG) – a visitor who stayed for at least one night in two or more destinations in *ENGLAND*, but did NOT stay in London

Important note: Multi-destination visitors include only those who *stayed overnight* in more than one destination. They exclude visitors who only took day trips to other destinations from their single place of stay. A further report will be produced later in 2017 which incorporates these days trips, using questions placed on the IPS during 2016.

# Executive summary

# Executive summary / 1

## What is the overall size and shape of the multi-destination market?

- 15% of all holiday trips to the UK are multi-destination trips of UK destinations, although only 9% are multi-destination trips of England destinations. This demonstrates the high volume of holiday multi-destination trips involving Scotland – either two or more destinations within Scotland or one England plus Scotland destinations
- 6% of all holiday trips to the UK are London Plus another England destination and a further 3% are non-London multi-destination trips of England
- Multi-destination trips are also not uncommon on non-holiday trips to the UK:
  - 11% of UK VFR trips are multi-destination of England (5% London Plus, 5% non-London multi-destination)
  - 10% of UK business trips are multi-destination of England (4% London Plus, 6% non-London multi-destination)
- In terms of nights and spend, multi-destination trips account for larger proportions:
  - 17% of UK holiday **nights** are accounted for by multi-destination trips of England (11% London Plus and 6% non-London multi-destination)
  - 14% of UK holiday **spend** is accounted for by multi-destination trips of England (10% London Plus and 4% non-London multi-destination)
- With the representation of multi-destination holiday trip spend slightly lower than it is for nights, this indicates that spend per night is lower among multi-destination visitors than among those staying in a single destination
- Over half (53%) of all holiday trips to the UK involve visiting London only, an illustration of the latent potential to encourage visitors to explore the rest of the UK

# Executive summary / 2

## Which regions are stayed in on England multi-destination holidays?

- The **South East** and **South West** are the two most common regions visited as part of a multi-destination holiday trip in England. When compared with the overall profile of overseas visitors to England's regions, we can see that the South West is especially well represented when it comes to multi-destination holiday trips
- This is the case for both London Plus holiday trips (39% visit SE, 34% SW) and, in particular, multi-destination holiday trips which do not involve London (55% visit SE, 50% SW)
- Almost half (47%) of multi-destination holiday trips in England involve a stay in more than one region outside of London. South East / South West is by far the most common regional visit combination, with 37% of all trips made by these visitors involving a visit to both of these regions. Other regional combinations with a higher than 5% share of this market are:
  - North West / Yorkshire (13%)
  - South East / East (11%)
  - North West / South West (10%)
- Related to this, the most common gateways for non-London multi-destination visitors are seaports (36%), primarily within the South East. Typically, these visitors tour the South East and South West regions
- Within the London Plus market, the North West (24% of London Plus holiday trips involve a stay in this region) and Yorkshire (15%) are also well represented
- 11% of multi-destination holiday trips were multiple destination stays within a single region. Again, the South East and South West were by far the most common regions for multi-destination stays within a single region



# Executive summary / 3

## What is the origin of England multi-destination holiday visitors?

- Multi-destination holiday visitors vary significantly between London Plus and non-London multi-destination visitors in terms of their origin markets:
  - London Plus market dominated by medium / long haul (24% North America, 36% other non-Europe)
  - Non-London market dominated by short haul visitors – 79% originating from European markets
- The largest single origin market among **London Plus** holiday visitors is the USA (19% of trips), with Australia accounting for a further 13% of trips
  - However, the longer average length of stay of visitors from Australia means that both the USA and Australia account for 19% of London Plus holiday nights
  - Between them, USA (22%) and Australia (18%) account for 40% of London Plus holiday spend. China currently accounts for 4% of London Plus holiday spend
- Two origin markets stand out among **non-London multi-destination** holiday visitors – Germany (23% of each of trips, nights and spend) and the Netherlands (14% of trips, 15% of nights, 12% of spend). Their representation within multi-destination trips is especially high compared with their representation within single destination trips
- Although France is well represented among the non-London multi-destination market in terms of trips (10%), average length of stay and spend among holiday visitors is low, meaning that France only accounts for 7% of nights and 5% of spend

# Executive summary / 4

## How else do England multi-destination holiday visitors vary?

- Multi-destination holiday trips to England are significantly more likely than single destination trips to occur over the summer period, with 50% of these trips taking place between July and September – similar for both London Plus (48%) and non-London multi-destination holiday trips (53%). Multi-destination trips are much less likely to take place between October and March
- London Plus holiday visitors stay the longest number of nights on average - 62% spend 8+ nights in the UK (21% spend 15+ nights) compared with 53% of non-London multi-destination visitors (19% spend 15+ nights).
- 85% of multi-destination holiday trips to England are organised independently as opposed to via a package. This is similar for London Plus and non-London multi-destination trips and also similar to London only visitors. Other single destination trips outside of London are more likely to be organised via a package (25%)
- The age profile of holiday visitors to England varies significantly by trip type:
  - Visitors on multi-destination trips tend to be older, with 32% aged 55 or over (38% for non-London multi-destination trips, 29% for London Plus trips)
  - Single destination holiday trips are much more likely to be the domain of younger visitors, with 41% of the London only holiday market and 38% of the non-London single destination market aged under 35 years
- Families (visitors with a child aged under 16 in their party) are significantly less likely to be multi-destination visitors than non-families – only 8% of families are on a multi-destination trip compared with 12% of holiday visitors overall. This is mainly driven by a lower propensity to take a London Plus holiday

# Executive summary / 5

## Hooks and barriers for travelling beyond London

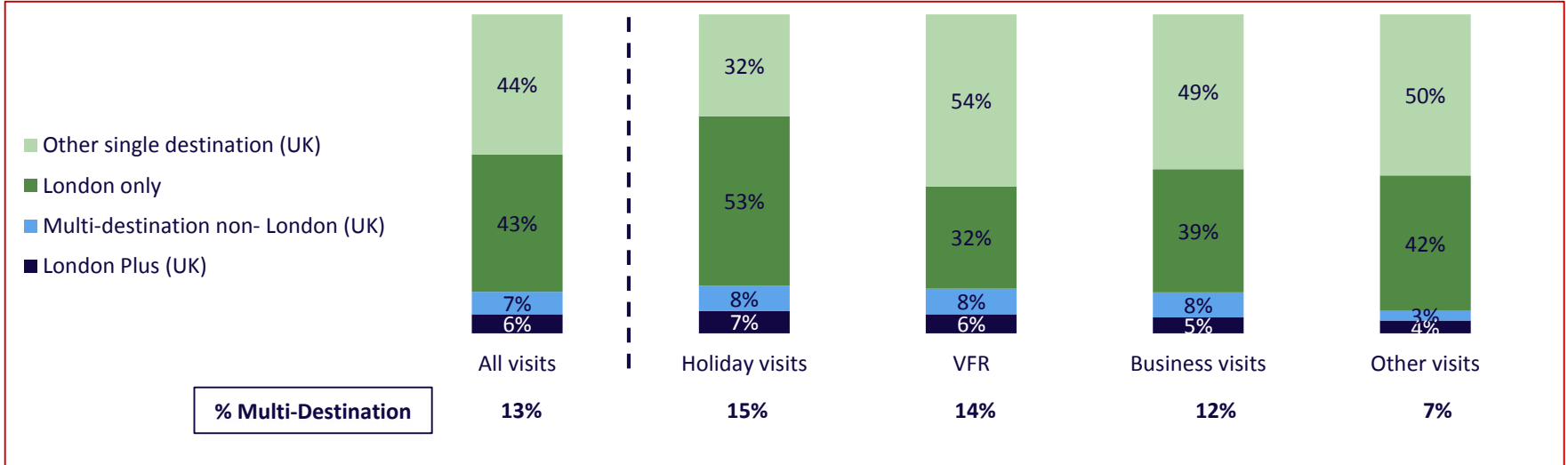
- Four main themes exist as barriers for overseas visitors travelling beyond London, as identified in VisitBritain's 2013 London & Beyond Report:
  - **Lack of awareness of the offer outside London:** There is a clear lack of awareness of British destinations other than London. Even where awareness exists, understanding of the experiences destinations offer is limited
  - **The all-encompassing London offer:** The draw of London is so strong that many feel they wouldn't have time or the need to go elsewhere. Attracting return visitors and longer stays is crucial to overcome this barrier.
  - **Desire and the importance of 'experiences':** Consumers are increasingly seeking 'experiential holidays' encompassing culture, food, accommodation and unique experiences. Britain less strong on most experiential areas
  - **Transport concerns:** Transport or access was identified as a key practical barrier for those that had not been beyond London. Around half said they would be nervous about driving in the UK and a quarter that it was too expensive to travel outside London. Almost a fifth thought that other places worth going to outside London would be too far to travel.
- There were seven key themes that acted as hooks for travelling beyond London:
  - **Heritage:** History and heritage are strongly associated with Britain's holiday offer. The most common reason for going beyond London (given by 81%) was that Britain has history spread across the country
  - **Countryside:** More than three quarters (78%) of those going beyond London gave Britain's unique and beautiful countryside as a reason for travel.
  - **Uniqueness and variety:** Britain's unique and varied nature is also appealing, 80% of those that went beyond London saying they did so because of Britain's diverse regions, and 75% because it offers unique places to stay
  - **British people and way of life:** Over two-thirds of those who went beyond London mentioned the British people as a reason for doing so. 70% wanted to meet British people / see the British way of life
  - **Cities and culture:** Britain's fun and vibrant cities were flagged as a factor which might persuade people to outside London. Britain's contemporary culture was also regarded as a key element of interest.
  - **Trains, tours and packages:** Most are willing to travel 2-3 hours from their initial base to stay in another destination. Preference is for train travel – a fifth said rail passes would help. Packaged tours and itineraries were also mentioned.

# What is the overall size and shape of the multi-destination market?

Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015

## Multi-destination share of UK VISITS - by trip purpose

Source: IPS 2013, 2014, 2015



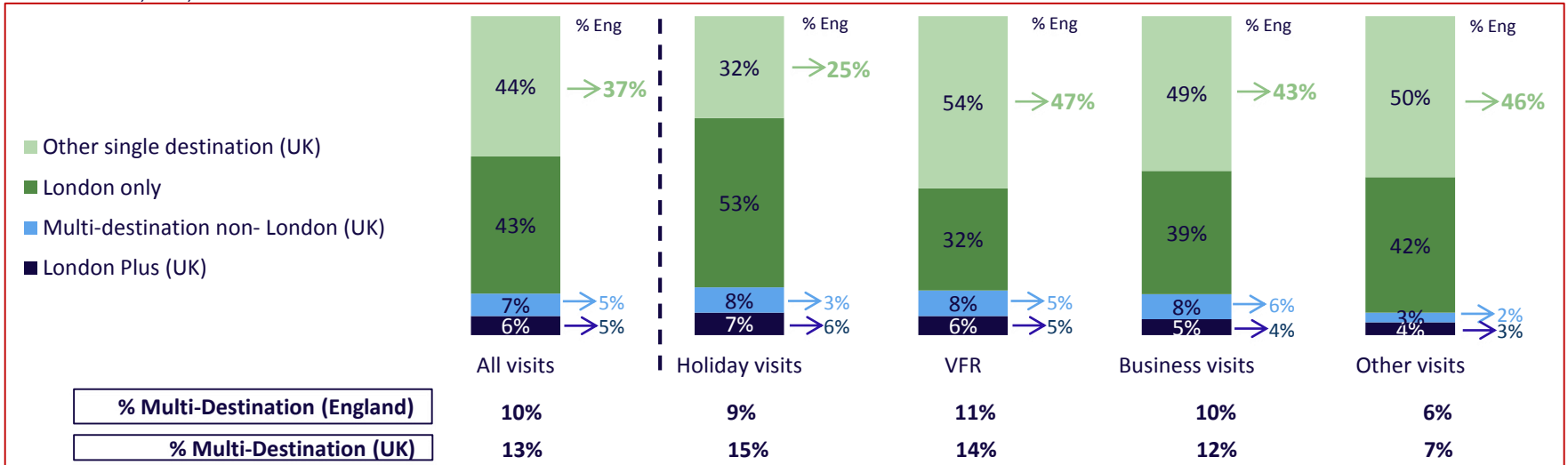
Multi-destination trips make up 13% of all trips to the UK. 6% are trips which incorporate London and at least one other region (including other home nations) and a further 7% are multi-destination trips which do not include London (again, including the home nations).

At this UK level, holiday trips are slightly more likely to be multi-destination in nature (15%) than either visits to friends/relatives (14%) or business trips (12%), driven by the latter's lower likelihood to generate London Plus trips.

Over half (53%) of all holiday trips to the UK involve visiting London only, an illustration of the latent potential to encourage visitors to explore the rest of the UK.

# England's share of multi-destination UK VISITS - by trip purpose

Source: IPS 2013, 2014, 2015

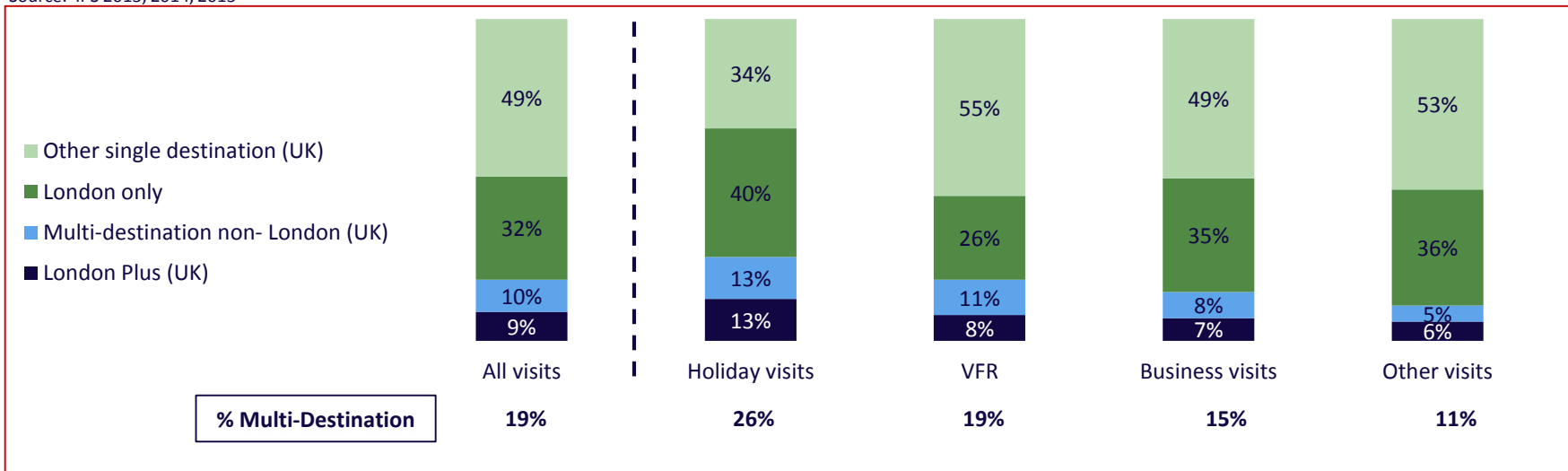


Whereas 13% of trips to the UK are multi-destination trips of **UK** destinations, only 10% are multi-destination trips of **England** destinations.

The difference between UK and England multi-destination trips is particularly apparent within the holiday market. Only 9% of these trips are multi-destination trips of England destinations compared with 15% which are multi-destination trips of UK destinations. This demonstrates the high volume of holiday multi-destination trips involving Scotland (either two or more destinations within Scotland or one England plus Scotland destinations) i.e. 8% of UK holiday trips are multi-destination non-London, but only 3% are holiday trips involving multiple England destinations.

## Multi-destination share of UK NIGHTS - by trip purpose

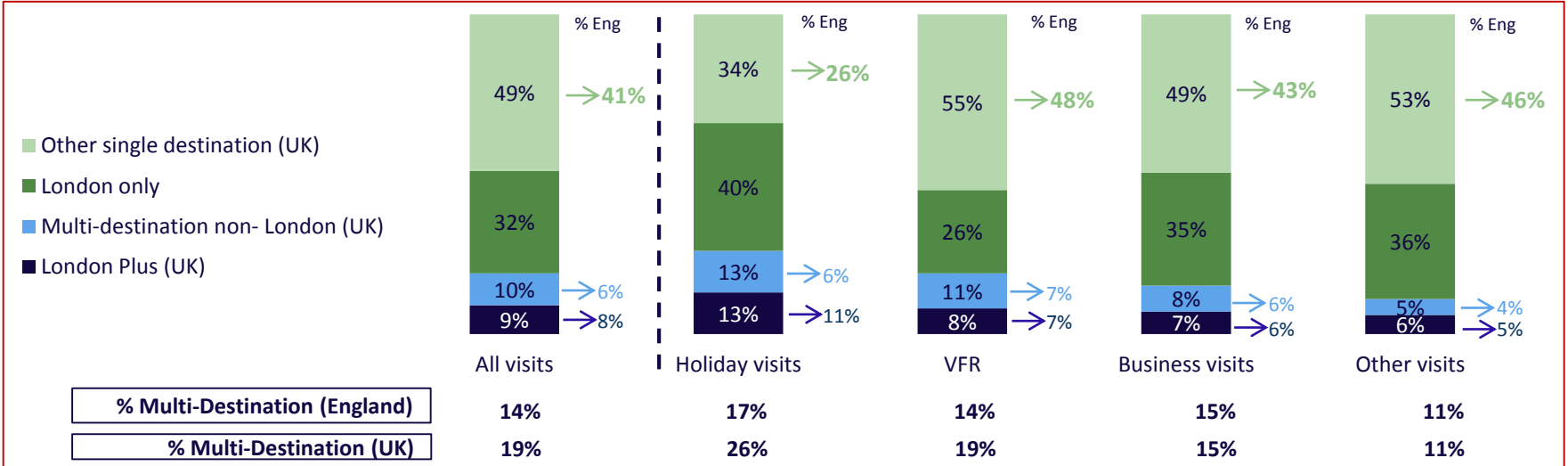
Source: IPS 2013, 2014, 2015



In terms of nights spent in the UK, multi-destination trips make up a larger proportion of nights (19%) than trips (13%), reflecting the longer length of stay of multi-destination visitors. With holiday trips of a longer average length than VFR, business or other visits, the representation of multi-destination trips within holiday trips is also more significant (26%) than for other trip types.

# England's share of multi-destination UK NIGHTS - by trip purpose

Source: IPS 2013, 2014, 2015



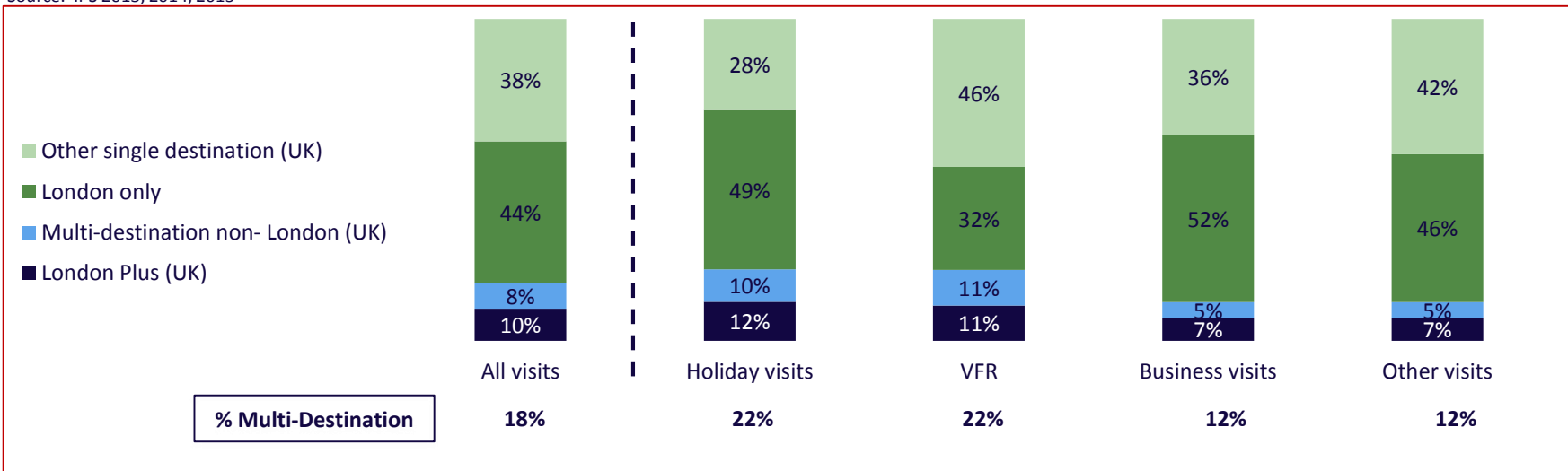
Again, whereas 19% of nights spent in the UK are accounted for by multi-destination trips of **UK** destinations, only 14% of nights are accounted for by multi-destination trips of **England** destinations.

The difference between UK and England multi-destination trips in terms of nights is again particularly apparent within the holiday market. Only 17% of these nights on these trips are multi-destination trips of England destinations compared with 26% of nights accounted for by multi-destination trips of UK destinations.



## Multi-destination share of UK SPEND - by trip purpose

Source: IPS 2013, 2014, 2015

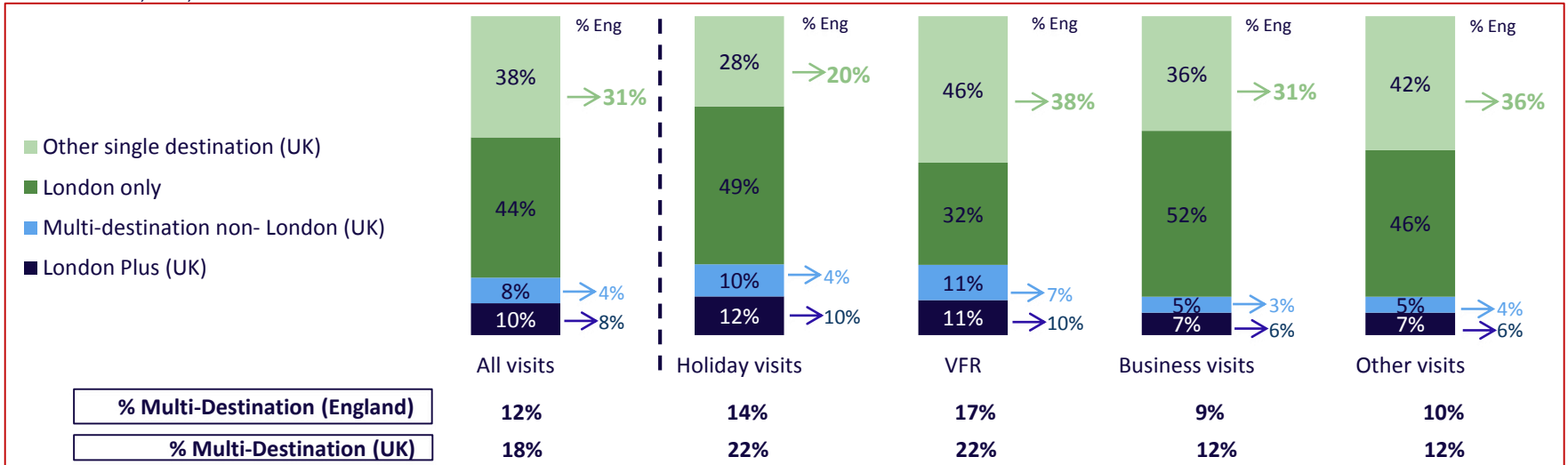


In terms of total spend in the UK, multi-destination trips make up a similar proportion of spend (18%) as they do nights (19%) – both of which are higher than trips (13%).

The representation of multi-destination trip spend within holiday trips (22%) is slightly lower than it is for nights (26%), indicating that spend per night is lower among multi-destination visitors than among those staying in a single destination.

# England's share of multi-destination UK SPEND - by trip purpose

Source: IPS 2013, 2014, 2015



Again, whereas 18% of spend in the UK is accounted for by multi-destination trips of **UK** destinations, only 12% of spend is accounted for by multi-destination trips of **England** destinations.

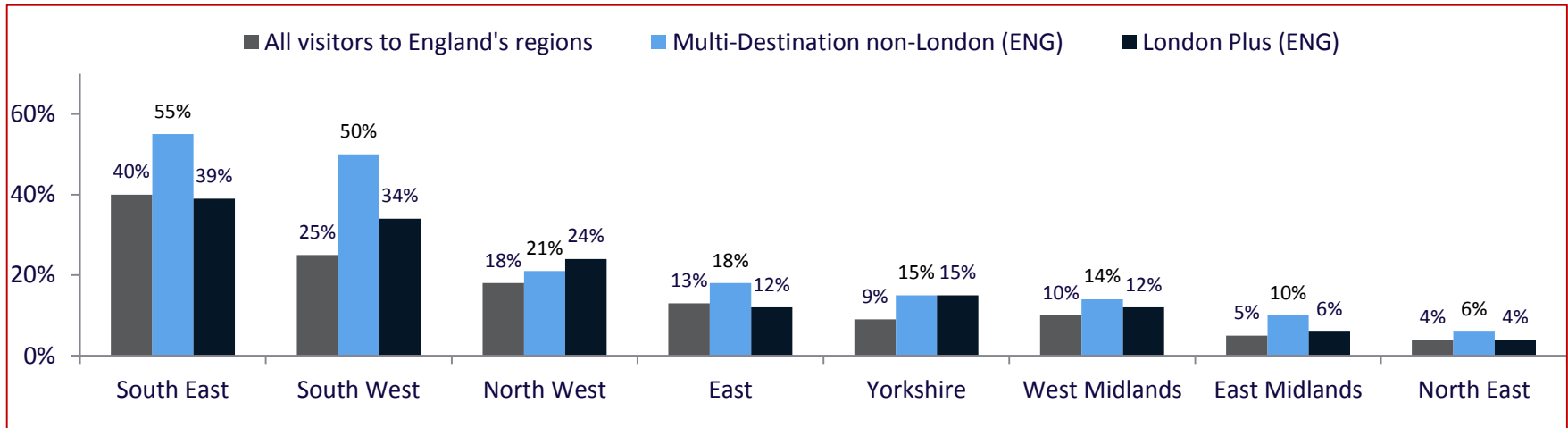
The difference between UK and England multi-destination spend is once again particularly apparent within the holiday market. Only 14% of UK holiday spend is accounted for by multi-destination trips of England destinations compared with 22% of UK holiday spend which is accounted for by multi-destination trips of UK destinations. Again, this highlights the importance of multi-destination trips and spend within Scotland or combining one England and Scotland destinations.

# Which regions are stayed in on England multi-destination holidays?

Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015

# Regions stayed in by England multi-destination holiday visitors

Source: IPS 2013-2015

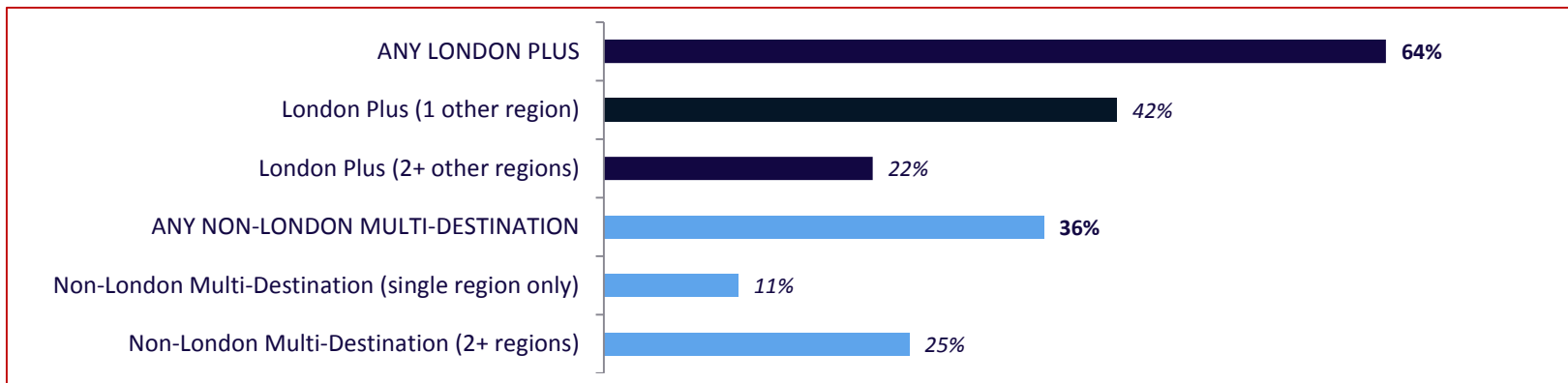


The South East (40%) and South West (25%) are the two most common regions visited as part of any type of holiday trip. However, these regions are even more dominant when it comes to multi-destination holiday trips, with the South West especially well represented relative to holiday trips to the region overall. This is the case for both London Plus holiday trips and, in particular, multi-destination holiday trips which do not involve London. Around half of visitors on non-London multi-destination holiday trips visit each of the South East and South West. Indeed, this is by far the most common regional visit combination (see Charts 24 and 25).

Although the South East and South West are also the most frequently stayed in regions within the London Plus market, the North West (24% of London Plus holiday trips involve a stay in this region) and to a lesser extent, Yorkshire (15%) are also well represented.

## Number of regions stayed in by England multi-destination holiday visitors

Source: IPS 2013-2015

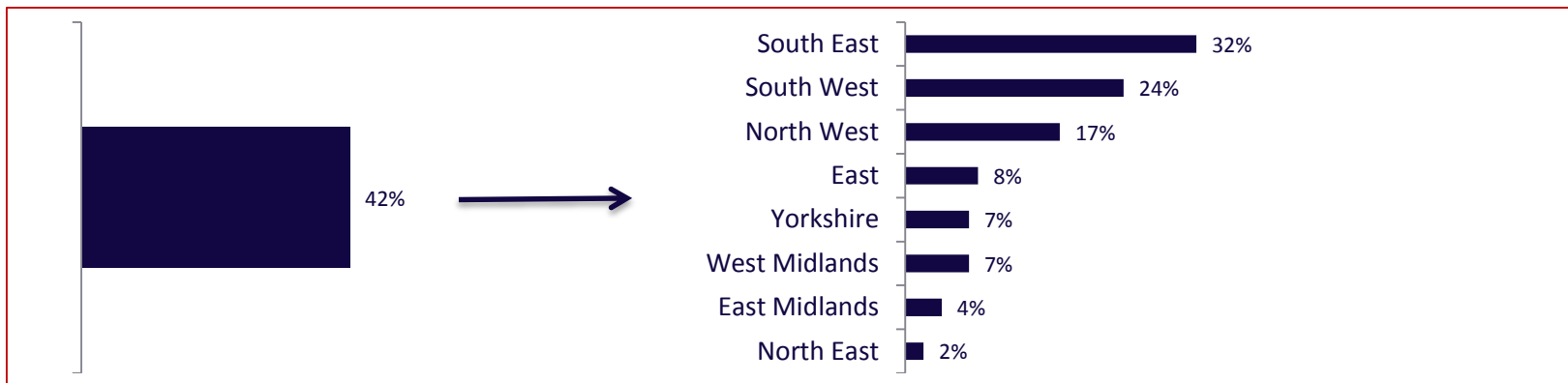


Two-thirds (64%) of England multi-destination holiday trips are accounted for by London Plus visitors. Within London Plus holiday trips, around two-thirds involve staying on only one other region of England.

The remaining third (36%) of England multi-destination holiday trips are accounted for by non-London multi-destination visitors. However, around a third of these are multi-destination visits which involve only a single region – for example, two or more separate destinations within the South East.

## Regions stayed in by London Plus holiday visitors who only visit one other region in England

Source: IPS 2013-2015

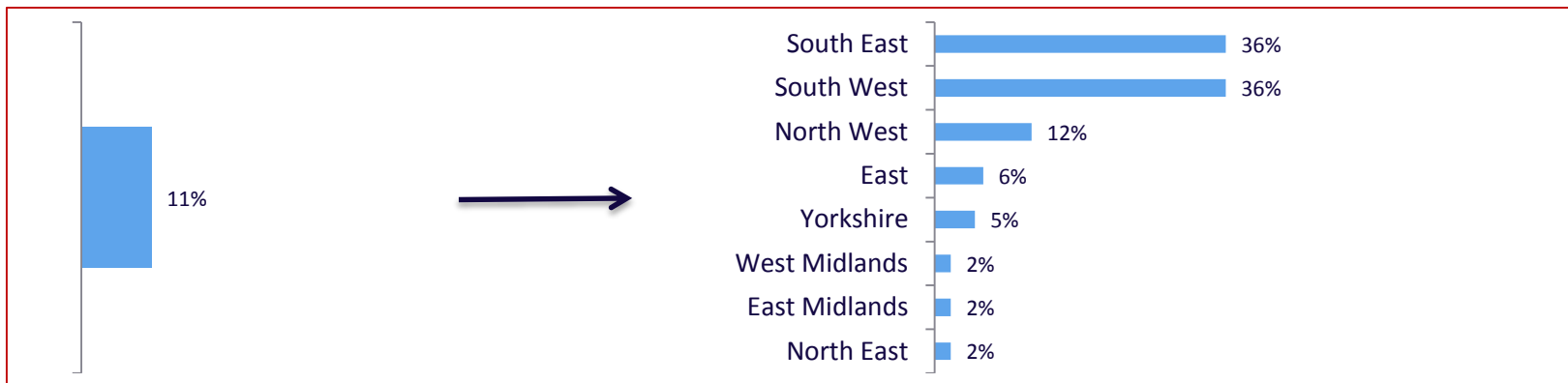


42% of all England multi-destination holiday trips are London Plus holidays which involve London plus only one other single region – comfortably the most common type of multi-destination trip.

The most common other region visited by those who visit London and only one other region is the South East, which accounts for 32% of trips made by these visitors. London plus the South West (24%) and London plus the North West (17%) are also common combinations among those who visit only one other region.

## Regions stayed in by non-London multi-destination holiday visitors who stayed within a single region

Source: IPS 2013-2015



As highlighted within the introduction, a non-London multi-destination trip includes trips involving only a single region, provided that two or more destinations were stayed in within that region.

Indeed, 11% of all multi-destination holiday trips were multiple stays within a single region. Again, the South East and South West were the most common regions for multiple destination stays within a single region. So for example, 36% of non-London multi-destination trips involving only one region were to the South East.

## Regional visit combinations for England’s multi-destination holiday visitors – all visiting 2 or more regions outside of London / 1

Source: IPS 2013,2014,2015

		North West	Yorkshire	West Mids	East Mids	East	South West	South East
<b>47% of all multi-destination holidays</b>	<b>North East</b>	4%	4%	1%	1%	2%	2%	1%
	<b>North West</b>	-	13%	6%	3%	5%	10%	9%
	<b>Yorkshire</b>	-	-	4%	3%	5%	8%	7%
	<b>West Midlands</b>	-	-	-	2%	4%	9%	9%
	<b>East Midlands</b>	-	-	-	-	2%	3%	4%
	<b>East</b>	-	-	-	-	-	6%	11%
	<b>South West</b>	-	-	-	-	-	-	<b>37%</b>

47% of all England multi-destination holidays involve trips to more than one region outside of London. The above table shows the proportions of these trips that involved stays in each combination of regions.

It is apparent that by far the most common combination of regions stayed in is the South West / South East, with 37% of all of these holiday trips including this combination. The evidence suggests that many of these are arriving by South East seaport gateway and touring the South East / South West of England (see Chart 26).

Other regional combinations are much less common, with Yorkshire / North West (13%), South East / East (11%) and North West / South West (10%) the most significant.



# Regional visit combinations for England’s multi-destination holiday visitors – all visiting 2 or more regions outside of London / 2

Source: IPS 2013,2014,2015

## 1. Multi-destination non-London

<i>Multi-destination non-London</i>	North West	Yorkshire	West Mids	East Mids	East	South West	South East
<b>25% of all multi-destination holidays</b>							
North East	4%	3%	1%	1%	1%	1%	1%
North West	-	9%	5%	3%	5%	5%	7%
Yorkshire	-	-	3%	3%	5%	4%	5%
West Midlands	-	-	-	3%	4%	8%	8%
East Midlands	-	-	-	-	3%	3%	5%
East	-	-	-	-	-	7%	12%
South West	-	-	-	-	-	-	<b>43%</b>

## 2. London Plus

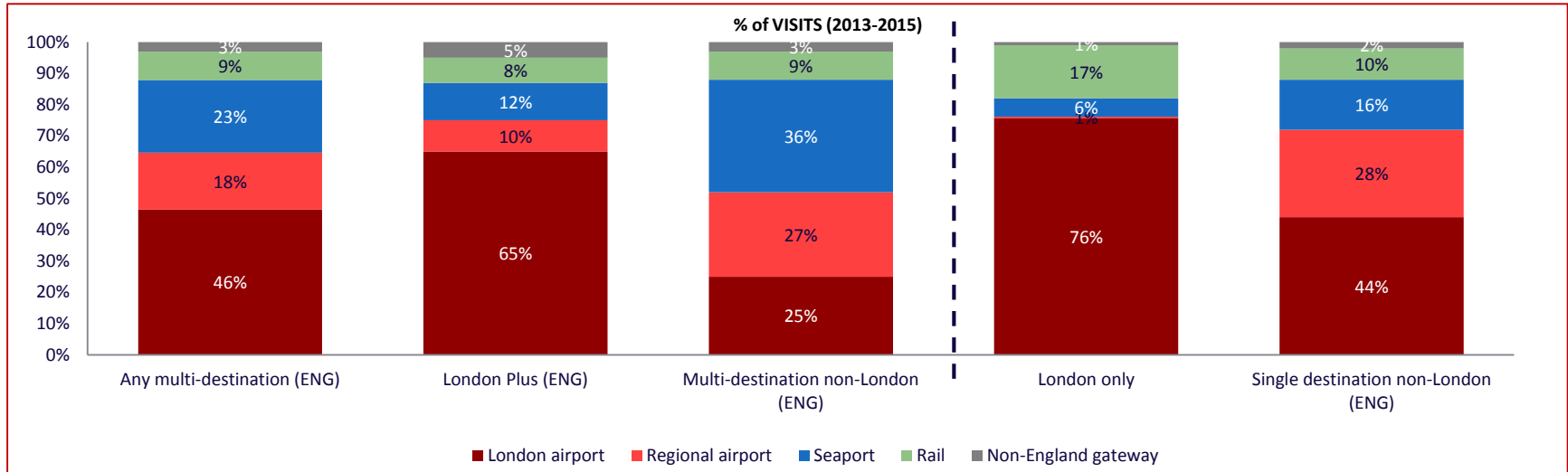
<i>London Plus</i>	North West	Yorkshire	West Mids	East Mids	East	South West	South East
<b>22% of all multi-destination holidays</b>							
North East	5%	4%	1%	1%	2%	2%	1%
North West	-	16%	8%	3%	6%	15%	13%
Yorkshire	-	-	6%	3%	5%	13%	8%
West Midlands	-	-	-	2%	3%	10%	10%
East Midlands	-	-	-	-	1%	3%	3%
East	-	-	-	-	-	5%	9%
South West	-	-	-	-	-	-	<b>31%</b>

The above table isolates regional trip combinations for multi-destination non-London holiday visitors and London Plus holiday visitors. Again, this demonstrates the dominance of the South East / South West combination, particularly among the non-London market, where 43% of all multi-destination holiday trips involve this combination.

So for example, 4% of non-London multi-destination holidays which involved visiting more than one region included stays in both the North East and North West.

# Gateways used by multi-destination holiday visitors staying in England

Source: IPS 2013, 2014, 2015



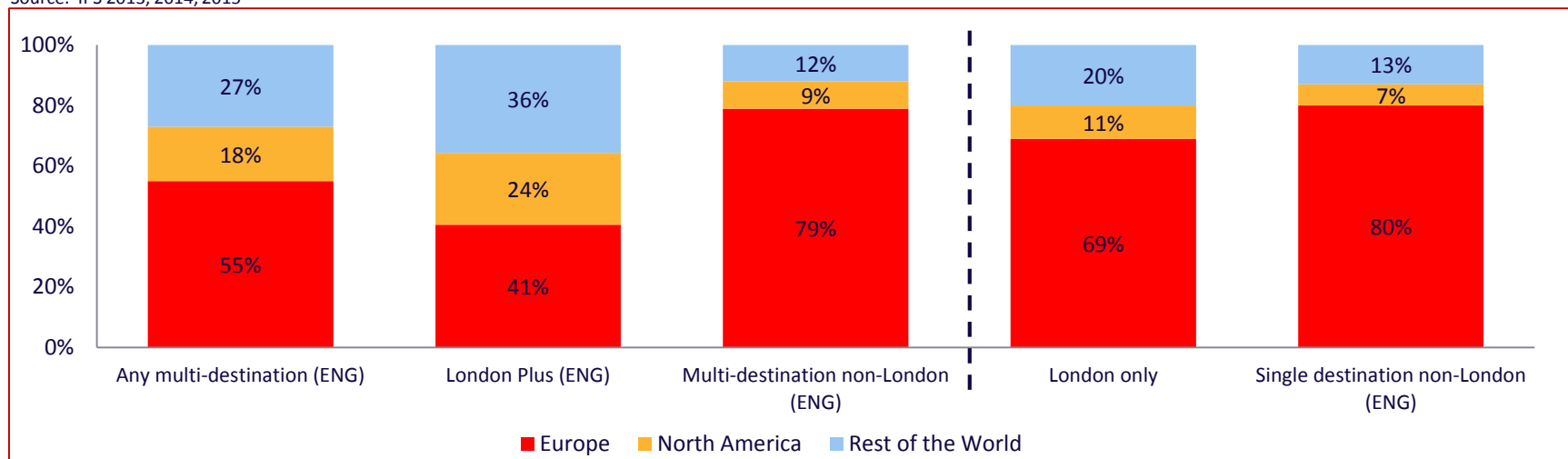
Whereas London Plus trips are dominated by those arriving through London airport gateways (65%), the most common gateway for non-London multi-destination visitors is through seaports (36%) – primarily within the South East. Typically, these visitors will tour the South East and South West regions and are more likely to originate from origin markets such as Germany, Netherlands and France.

# What is the origin of England multi-destination holiday visitors?

Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015

## Source markets for multi-destination holiday trips in England – by world region (VISITS)

Source: IPS 2013, 2014, 2015



Multi-destination holiday visitors vary significantly between London Plus and non-London multi-destination visitors in terms of their origin markets. Whereas the London Plus market is dominated by medium/long-haul visitors (24% North America and 36% other non-Europe), the non-London multi-destination market is dominated by short haul visitors – 79% originating from European markets. Further granularity in these markets is illustrated on the next chart.

## Source markets for multi-destination holiday trips in England - by world region (VISITS)

Source: IPS 2013,2014,2015

	Any multi-destination	London Plus (ENG)	Multi-destination non-London (ENG)	London only	Single destination non-London (ENG)
	<i>(11% of all visits)</i>	<i>(7% of all visits)</i>	<i>(4% of all visits)</i>	<i>(61% of all visits)</i>	<i>(29% of all visits)</i>
<b>ANY EU15</b>	46%	33%	70%	56%	66%
<b>Germany</b>	15%	10%	<b>23%</b>	9%	12%
<b>USA</b>	15%	<b>19%</b>	7%	9%	6%
<b>Australia</b>	10%	<b>13%</b>	5%	3%	2%
<b>Netherlands</b>	7%	3%	<b>14%</b>	4%	7%
<b>France</b>	6%	4%	10%	14%	15%
<b>Nordics</b>	6%	5%	7%	12%	7%
<b>Spain</b>	3%	3%	3%	6%	7%
<b>Italy</b>	3%	3%	3%	7%	7%
<b>China</b>	2%	3%	<0.5%	<0.5%	1%

EU15: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden

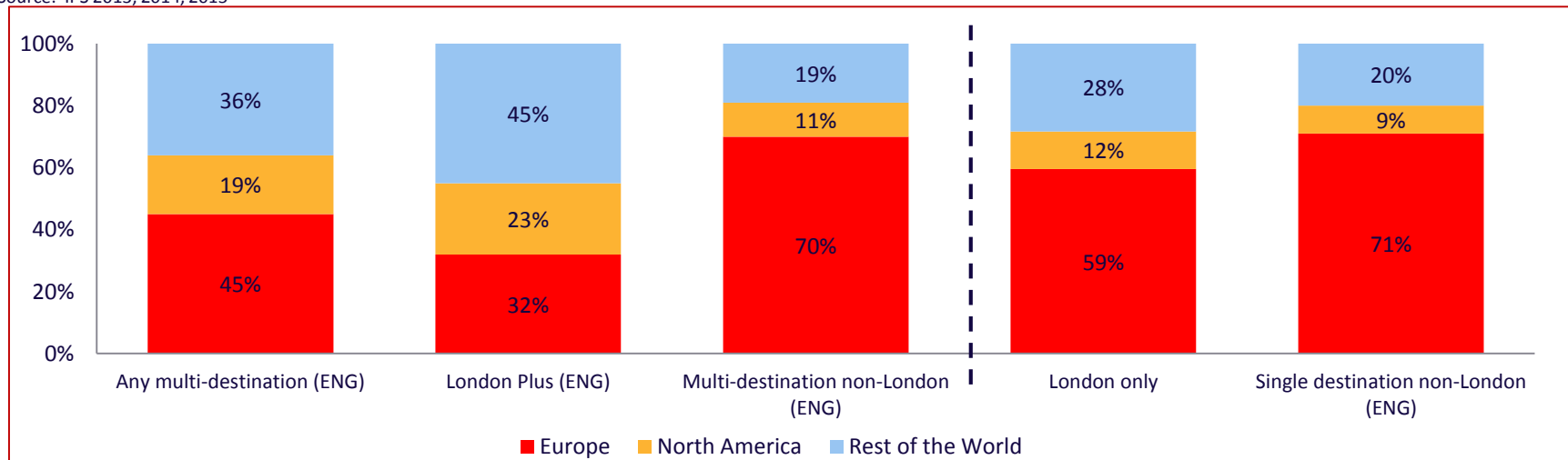
The largest single origin market among London Plus holiday visitors is the USA, representing 19% of all London Plus holiday trips. Australia represents a further 13% of London Plus holiday trips.

Three European markets dominate the non-London multi-destination holiday market – Germany (23% of trips), Netherlands (14%) and France (10%).

Visitors from Germany, and to a lesser extent the Netherlands, are particularly likely to be non-London multi-destination visitors, especially relative to their representation among those visiting only a single destination outside of London. Conversely, visitors from France are still more likely to be seen visiting a single region than undertaking a multi-destination holiday trip.

## Source markets for multi-destination holiday trips in England – by world region (NIGHTS)

Source: IPS 2013, 2014, 2015



With their longer average length of stay, in terms of nights, medium/long-haul visitors dominate the London Plus market even more strongly than they do for trips (23% of nights accounted for by North American visitors and 45% by other non-Europeans). However, even in terms of nights, the non-London multi-destination market is still dominated by short haul visitors – 70% originating from European markets. Again, further granularity in these markets is illustrated on the next chart.

## Source markets for multi-destination holiday trips in England - by world region (NIGHTS)

Source: IPS 2013,2014,2015

	Any multi-destination <i>(20% of all nights)</i>	London Plus (ENG) <i>(14% of all nights)</i>	Multi-destination non-London (ENG) <i>(7% of all nights)</i>	London only <i>(49% of all nights)</i>	Single destination non-London (ENG) <i>(31% of all nights)</i>
<b>ANY EU15</b>	38%	25%	63%	59%	56%
<b>Australia</b>	16%	<b>19%</b>	9%	4%	4%
<b>USA</b>	15%	<b>19%</b>	8%	10%	7%
<b>Germany</b>	14%	9%	<b>23%</b>	7%	12%
<b>Netherlands</b>	7%	3%	<b>15%</b>	3%	5%
<b>France</b>	4%	3%	7%	10%	11%
<b>Nordics</b>	4%	4%	5%	9%	5%
<b>Spain</b>	2%	2%	3%	6%	8%
<b>Italy</b>	2%	2%	2%	7%	7%
<b>China</b>	2%	2%	1%	1%	1%

EU15: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden

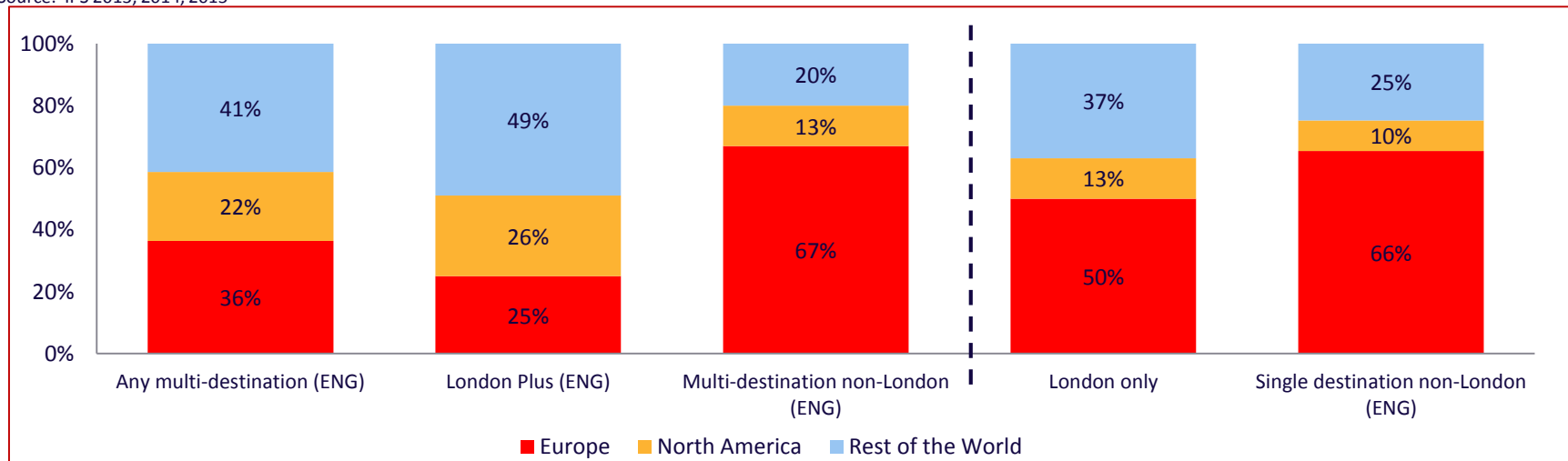
Whereas the USA dominates the London Plus market in terms of trips, the longer average stay of visitors from Australia means that these two markets have an equal share of the London Plus market in terms of nights (both 19% of the London Plus market).

Two European markets dominate the non-London multi-destination holiday market in terms of nights – Germany (23% - the same proportion as for trips) and the Netherlands (15%, again similar to trips – 14%). France (7% of nights) is less well represented in terms of nights than trips (10%), reflecting their shorter length of stay.

Again, visitors from Germany and the Netherlands are particularly likely to be non-London multi-destination visitors relative to their representation among those visiting only a single destination outside of London.

## Source markets for multi-destination holiday trips in England – by world region (SPEND)

Source: IPS 2013, 2014, 2015



In terms of spend, medium/long-haul visitors dominate the London Plus market even more strongly than they do for nights (26% of spend accounted for by North American visitors and 49% by other non-Europeans). So 75% of all London Plus spend is accounted for by non-European markets.

However, even in terms of spend, the non-London multi-destination market is still dominated by short haul visitors – 67% originating from European markets.

So looking at multi-destination visitors overall, 63% of their spend originates from the non-European markets. Again, further granularity in these markets is illustrated on the next chart.



## Source markets for multi-destination holiday trips in England - by world region (SPEND)

Source: IPS 2013,2014,2015

	Any multi-destination (17% of all spend)	London Plus (ENG) (12% of all spend)	Multi-destination non-London (ENG) (4% of all spend)	London only (60% of all spend)	Single destination non-London (ENG) (24% of all spend)
<b>ANY EU15</b>	30%	19%	59%	39%	52%
<b>USA</b>	19%	<b>22%</b>	<b>11%</b>	11%	8%
<b>Australia</b>	16%	<b>18%</b>	9%	4%	4%
<b>Germany</b>	11%	7%	<b>23%</b>	6%	11%
<b>Netherlands</b>	4%	2%	<b>12%</b>	3%	5%
<b>Nordics</b>	4%	4%	6%	10%	7%
<b>France</b>	3%	2%	5%	8%	9%
<b>China</b>	3%	4%	1%	1%	3%
<b>Spain</b>	2%	1%	2%	4%	6%
<b>Italy</b>	2%	2%	2%	5%	7%

EU15: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden

Whilst Australia is on a par with the USA in terms of representation of nights within the London Plus market (19% each), London Plus visitors from the USA spend more per head, meaning that their representation in terms of spend is 22% compared with 18% for visitors from Australia. Between them, these two markets account for 40% of all spend within the London Plus market. It is also noteworthy that the China market accounts for only 2% of London Plus nights but 4% of spend.

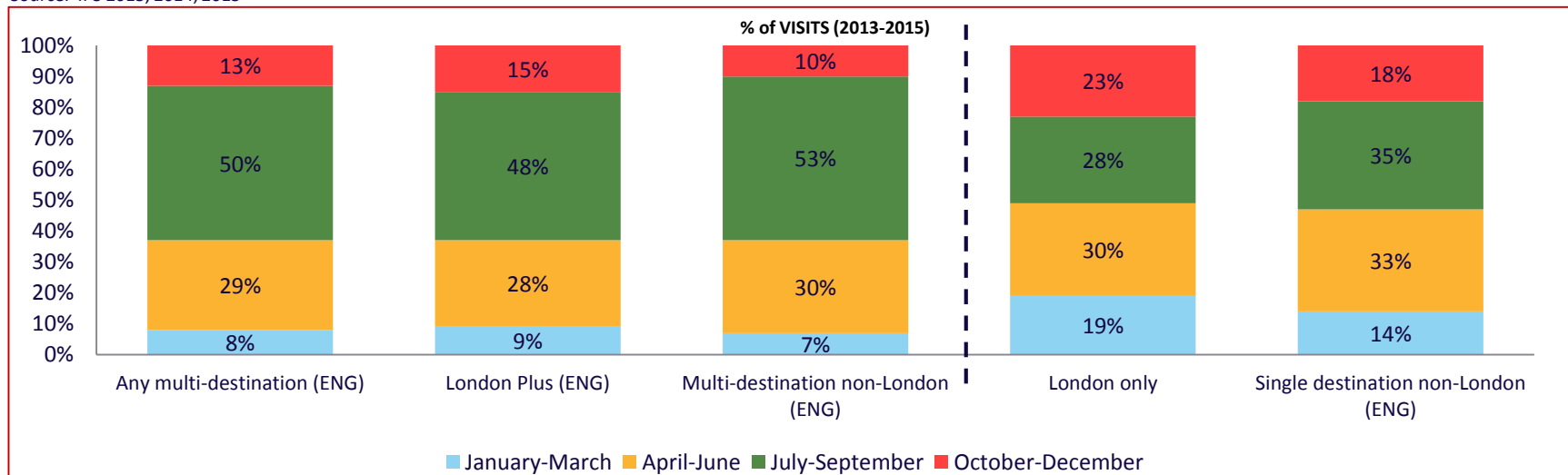
Whilst, Germany (23%) and the Netherlands (12%) are the two European markets which dominate the non-London multi-destination holiday market in terms of spend, the USA is also well represented here (11% of spend) – again, reflecting their high level of spend per head. In terms of spend, France (5% of spend) is much less well represented than in terms of nights (7%) or trips (10%).

# How else do England multi-destination holiday visitors vary?

Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015

## Seasonality of multi-destination holiday stays in England (VISITS)

Source: IPS 2013, 2014, 2015



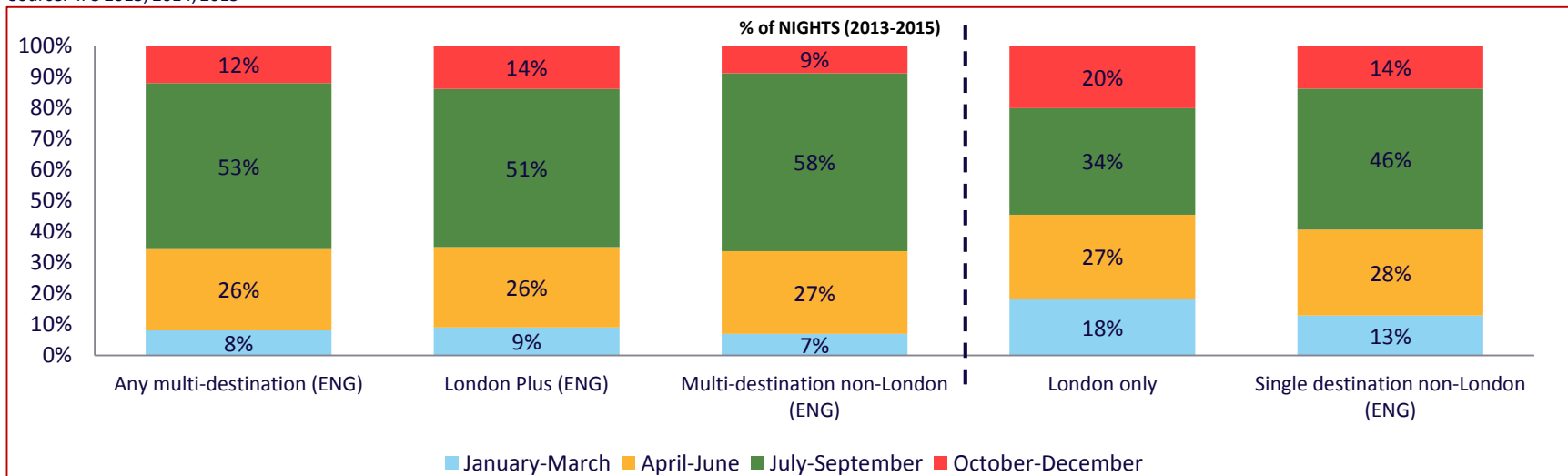
Multi-destination holiday trips to England are significantly more likely than single destination trips to occur over the summer period, with 50% of multi-destination trips to England taking place between July and September. This is similar for both London Plus (48%) and non-London multi-destination (53%) trips.

Multi-destination holiday trips are much less likely than single destination trips to take place between October and March. Only 21% of multi-destination holiday trips to England (24% of London Plus and only 17% of non-London multi-destination trips) take place during this period.

Conversely, London only holiday trips are much more likely to take place during this period – 42% of trips taking place between October and March.

## Seasonality of multi-destination holiday stays in England (NIGHTS)

Source: IPS 2013, 2014, 2015

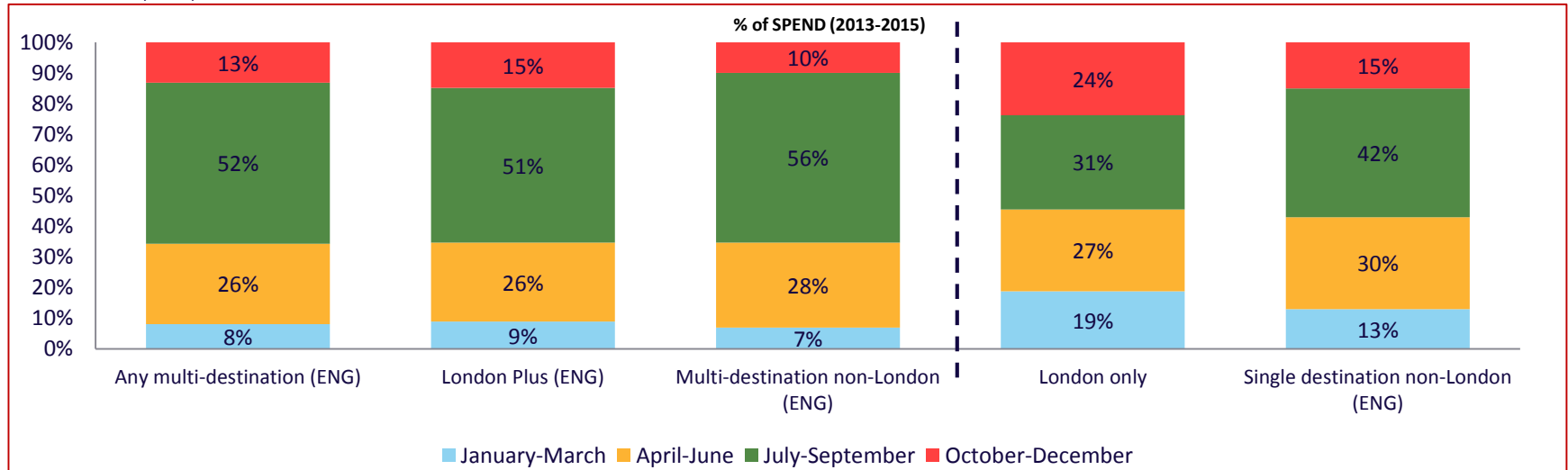


In terms of nights, multi-destination holidays to England are even more likely to occur over the summer period, with 53% of multi-destination nights occurring between July and September. This is higher among non-London multi-destination trips (58% of nights in the summer period) than for London Plus trips (51%).

However, it should be noted that single destination holiday trips outside of London during the summer period, whilst only representing 35% of trips, accounts for 46% of nights – reflecting the longer average length of stay in non-London destinations during the summer.

## Seasonality of multi-destination holiday stays in England (SPEND)

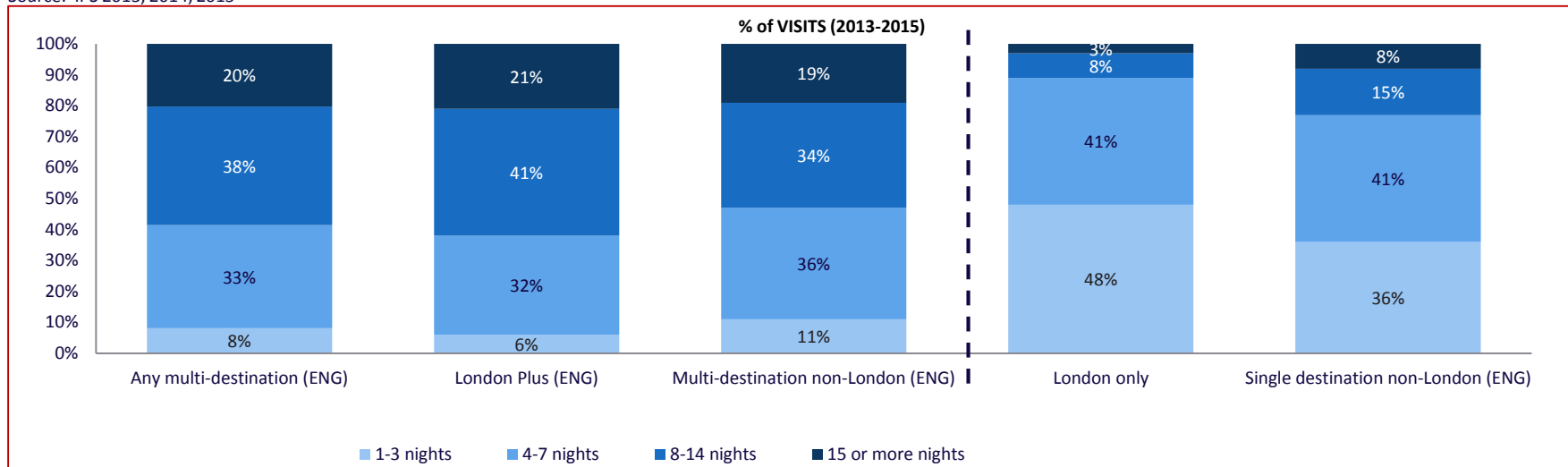
Source: IPS 2013, 2014, 2015



Similarly, multi-destination holiday spend in England is much more likely to occur over the summer period, with 52% of multi-destination spend occurring between July and September – similar to the proportion of nights. This is once again higher for non-London multi-destination trips (56% of spend is in the summer period) than for London Plus trips (51%). The October to March period accounts for 43% of all spend for those who are only visiting London during their trip. This compares with only 24% for those who are on a London Plus trip.

## Length of multi-destination holiday stays in England (VISITS)

Source: IPS 2013, 2014, 2015

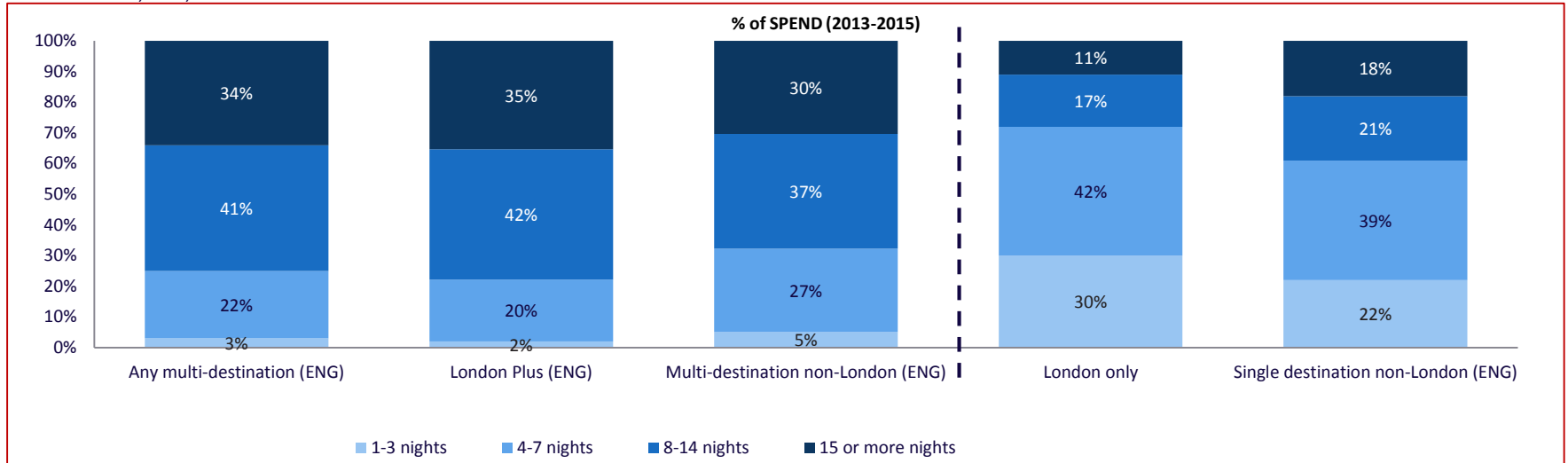


When it comes to the length of time spent in England, London Plus holiday visitors stay the most number of nights, with 62% spending 8 nights or more in the UK. London Plus visitors stay longer than non-London multi-destination visitors (only 53% of these visitors staying 8 nights or more).

Conversely, almost half (48%) of visitors on a London only holiday trip stay only 1-3 nights. This is significantly higher than those on a single destination holiday trip to a destination outside of London (36%).

## Length of multi-destination holiday stays in England (SPEND)

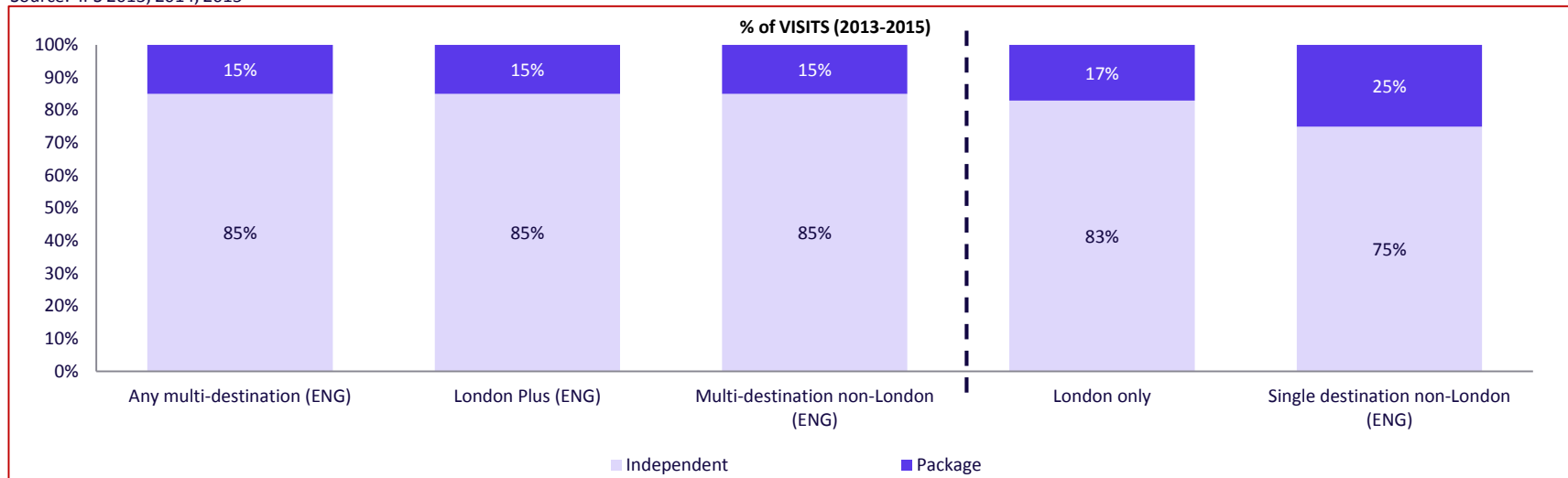
Source: IPS 2013, 2014, 2015



75% of all spend on multi-destination holiday trips to England is accounted for by those staying 8 nights or more in the UK. Indeed, 34% of all spend is accounted for by those staying 15 or more nights.

## Type of multi-destination holiday to England (VISITS)

Source: IPS 2013, 2014, 2015

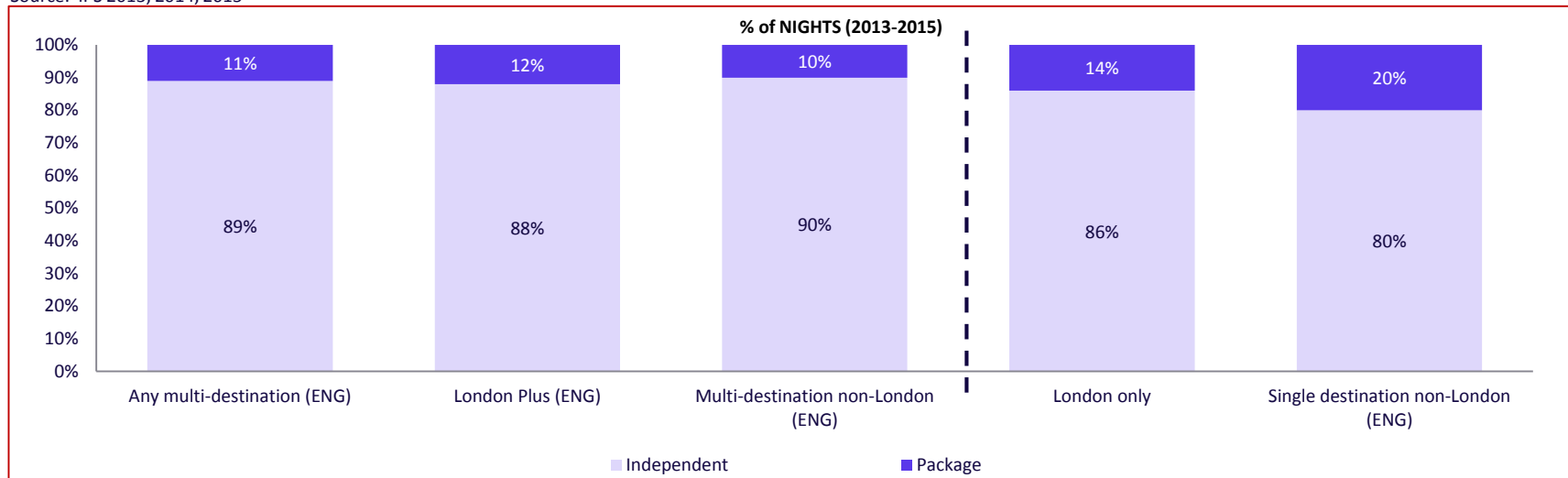


85% of multi-destination holiday trips to England are organised independently, with only 15% packages. This is similar among both London Plus and non-London multi-destination holiday trips and indeed among those visiting London only. However, those on a single destination holiday trip outside of London are significantly more likely to be on a package holiday (25%).



## Type of multi-destination holiday to England (NIGHTS)

Source: IPS 2013, 2014, 2015

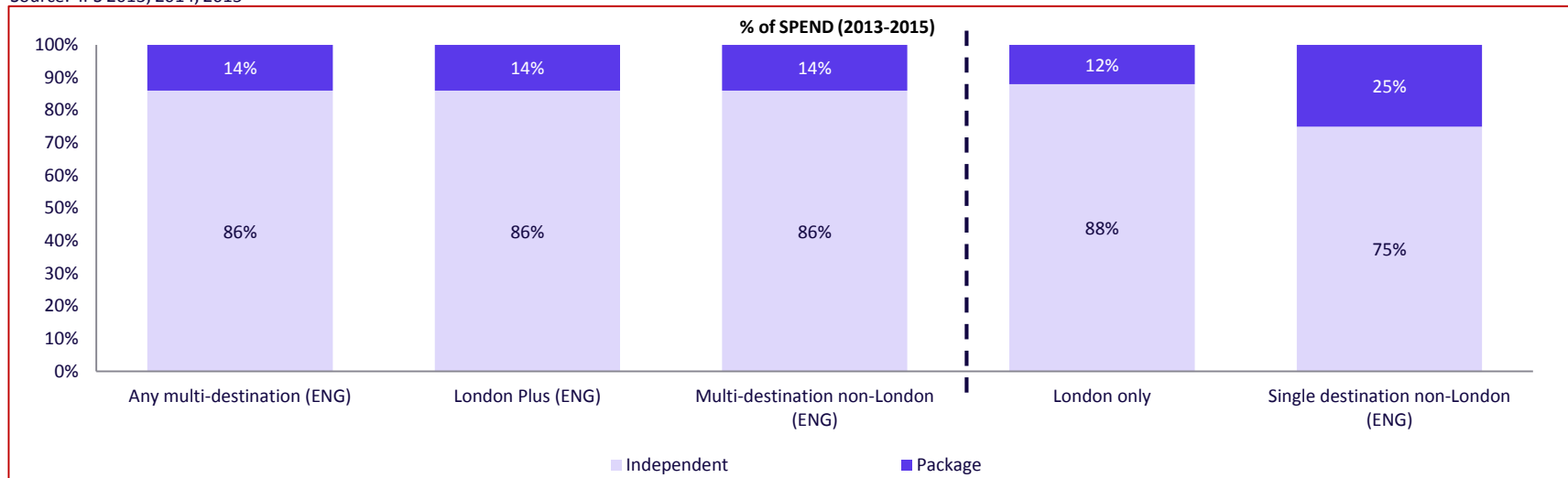


Reflecting the longer average length of stay among those travelling independently, 89% of nights spend by multi-destination holiday visitors trips to England are organised independently, compared with only 85% of trips. Again, this is similar among both London Plus (88%) and non-London multi-destination (90%) holiday trips and among those visiting London only (86%).

However, once again, single destination holiday nights outside of London are more likely to be accounted for by package holidays (20%).

## Type of multi-destination holiday to England (SPEND)

Source: IPS 2013, 2014, 2015

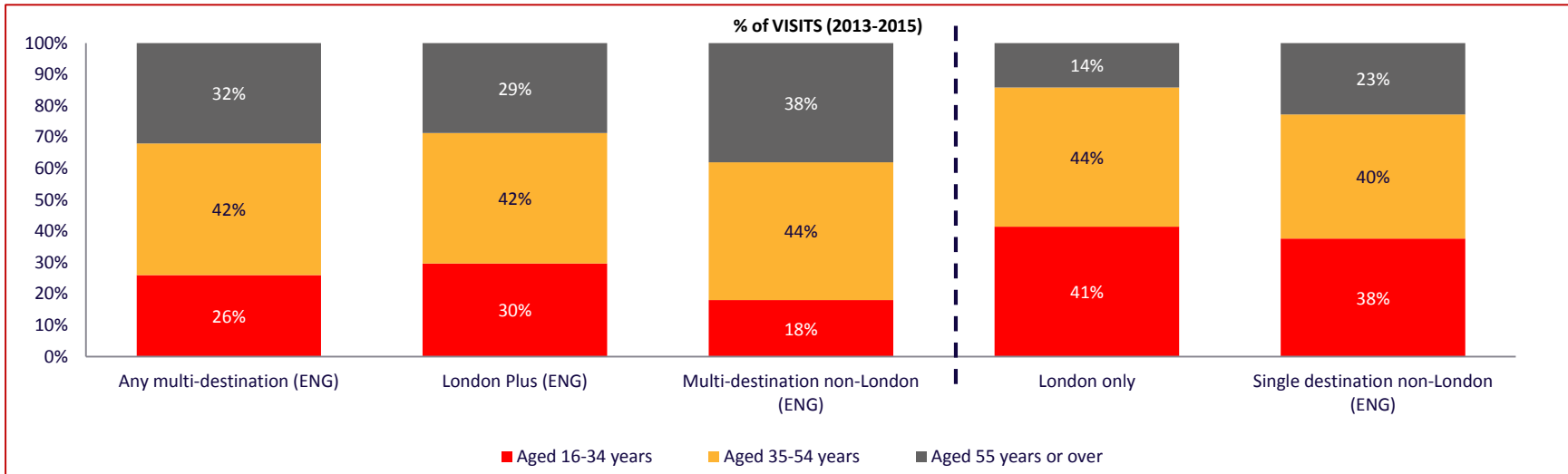


However, spend is more reflective of trips than nights, indicating that average spend on package holidays is significantly higher than on independent holidays. 86% of all spend on multi-destination holidays is accounted for independent holiday trips – again similar for both London Plus (86%) and non-London multi-destination (86%) holidays.

However, once again, single destination holiday spend outside of London is more likely to be accounted for by package holidays (25%).

## Age of multi-destination holiday visitors staying in England (VISITS)

Source: IPS 2013, 2014, 2015

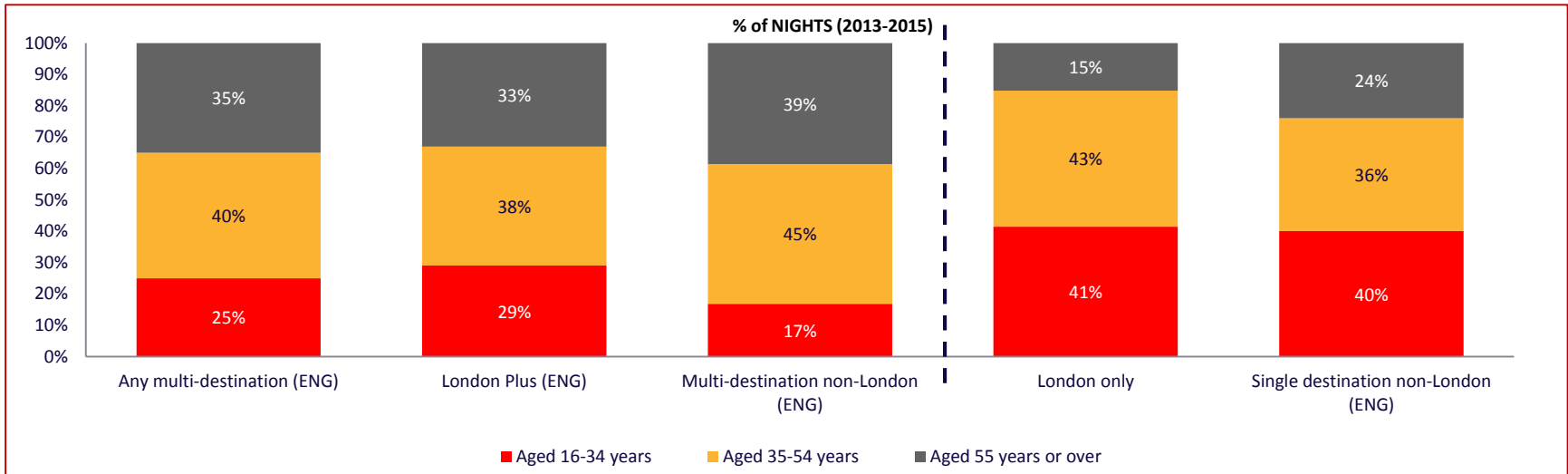


The age profile of holiday visitors to England varies significantly by trip type.

- For holiday visitors on multi-destination trips, the age profile tends to be older, with 32% of visitors aged 55 or over. This is particularly the case among those on non-London multi-destination trips, on which 38% are aged 55 or over (only 18% of this market is aged under 35 years)
- Single destination holiday trips are much more likely to be the domain of younger visitors, with 41% of the London only holiday market and 38% of the non-London single destination market accounted for by visitors aged under 35 years

## Age of multi-destination holiday visitors staying in England (NIGHTS)

Source: IPS 2013, 2014, 2015

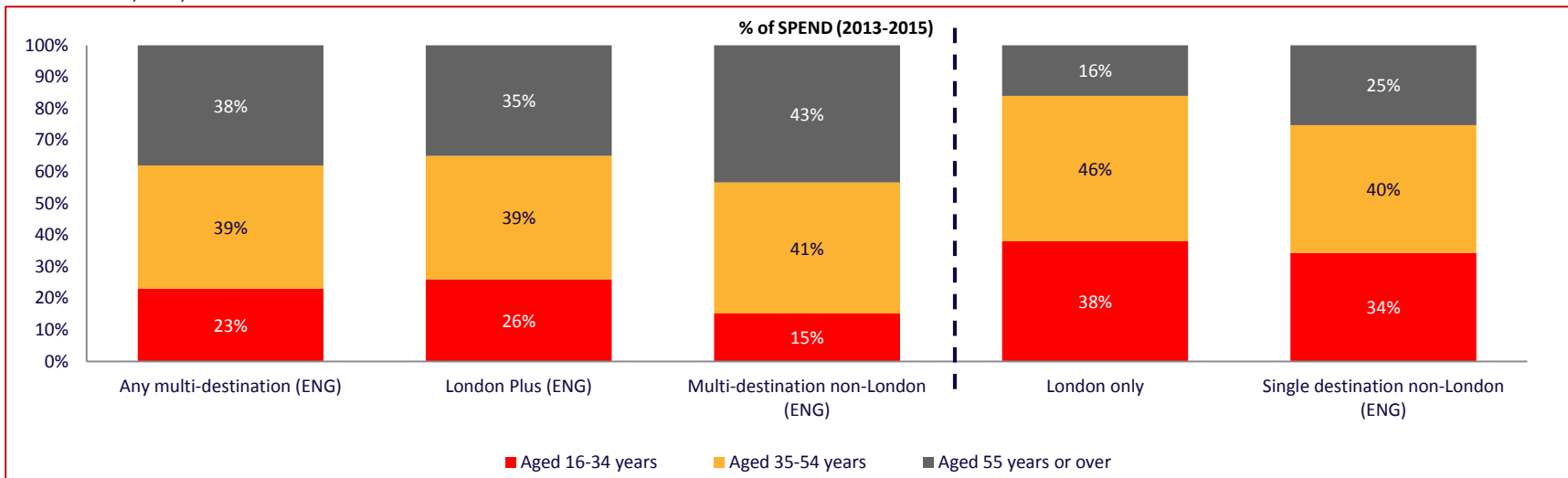


There is also evidence that those aged 55 or over tend to stay slightly longer on holiday trips, regardless of whether on a single or multi-destination trip. For example, whereas those aged 55 or over accounted for 32% of holiday trips, they account for 35% of holiday nights.

The pattern is similar, if slightly less strong, within the single destination market, whether London only or non-London single destinations.

## Age of multi-destination holiday visitors staying in England (SPEND)

Source: IPS 2013, 2014, 2015

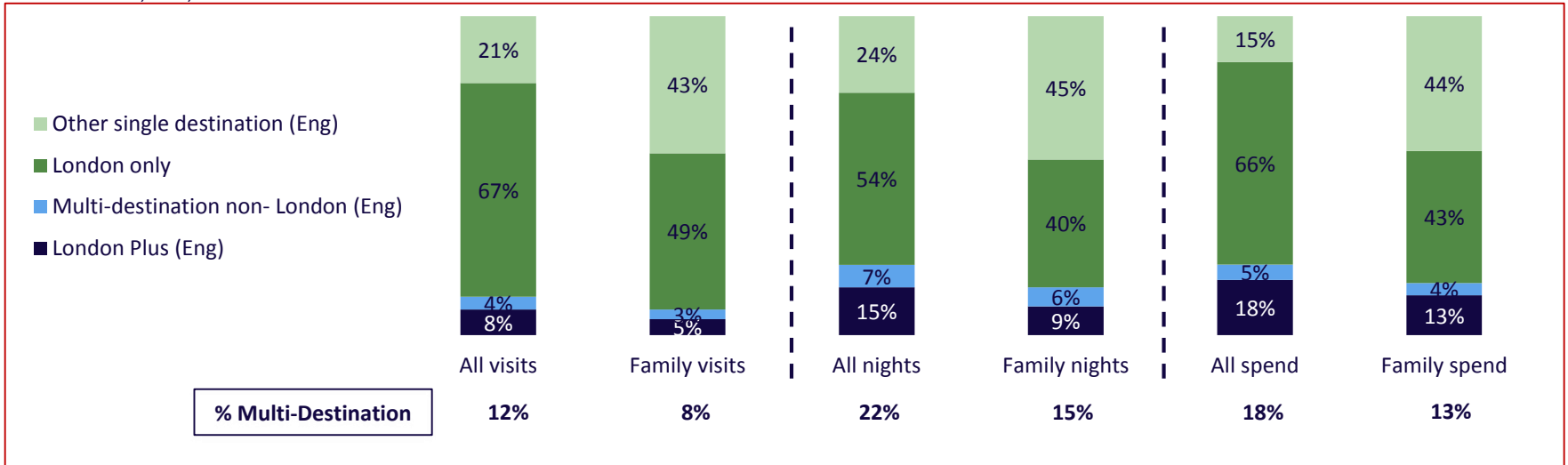


Furthermore, there is also evidence that those aged 55 or over spend slightly more per night away on holiday trips, again regardless of whether on a single or multi-destination trip. For example, whereas those aged 55 or over accounted for 35% of holiday nights, they account for 38% of holiday spend. Again, this is particularly the case among the non-London multi-destination holiday market, where 43% of spend is accounted for by those aged 55 or over.

The pattern is similar, if slightly less strong, within the single destination market, whether London only or non-London single destinations, although those aged under 35 years still dominate here in terms of spend as well as trips and nights.

## Families share of multi-destination staying holiday visits in England

Source: IPS 2013, 2014, 2015



Families (visitors with a child aged under 16 in their party) are significantly less likely to be multi-destination holiday visitors to England than non-families. Only 8% of families are on a multi-destination trip compared with 12% of visitors overall. This is primarily driven by a much lower likelihood to be on a London Plus holiday trip (5% of family trips compared with 8% of trips overall).

Conversely, family visits are much more likely to be single destination trips outside of London. 43% of families are on this type of trip compared with only 21% of holiday visitors to England overall.

The pattern is similar when looking at both nights and spend.

# Hooks and barriers for travelling beyond London

This section is based upon a comprehensive 2013 VisitBritain study into why many visitors to Britain do not travel beyond London – what the barriers are and what attracts those that do go beyond London to do so.

Research was undertaken in four established markets (France, Germany, Norway and USA). Please bear in mind that findings reflect views and behaviour in these markets only which may differ to those of other markets (especially emerging markets).

## Headline findings

Source: London and Beyond report 2013

- London remains the key draw within Britain, even for those who have visited before, but many would want to see other places in Britain as well as London again when they return. ‘London Plus’ appeals to the majority.
- Knowledge of destinations drives desire, but knowledge of British destinations other than London can be low, although this varies notably by market.
- Those who visit London often want to ‘see’ London/ ‘do the sights’ rather than to have a particular type of holiday experience. This is different from behaviour when choosing competitor destinations, and does not reflect the growing importance of ‘experiences’.
- The most common practical barriers to going outside London were concerns about transport/ access.
- Most common draws for going outside of London were heritage variety, countryside, unique places to stay and the British people.
- Travel agents remain important for a minority, especially in Germany and the US, but the majority in each market reported booking independently, with Britain particularly attracting independent travellers. However, there is a gap for tours, packages and agents, or at least suggested itineraries, to enable trips outside London which many lack the knowledge to make the most of.
- There is no single ‘ideal’ itinerary when combining London with other destinations (‘London Plus’), but most are willing to travel 2-3 hours to/ between destinations, preferably by train.

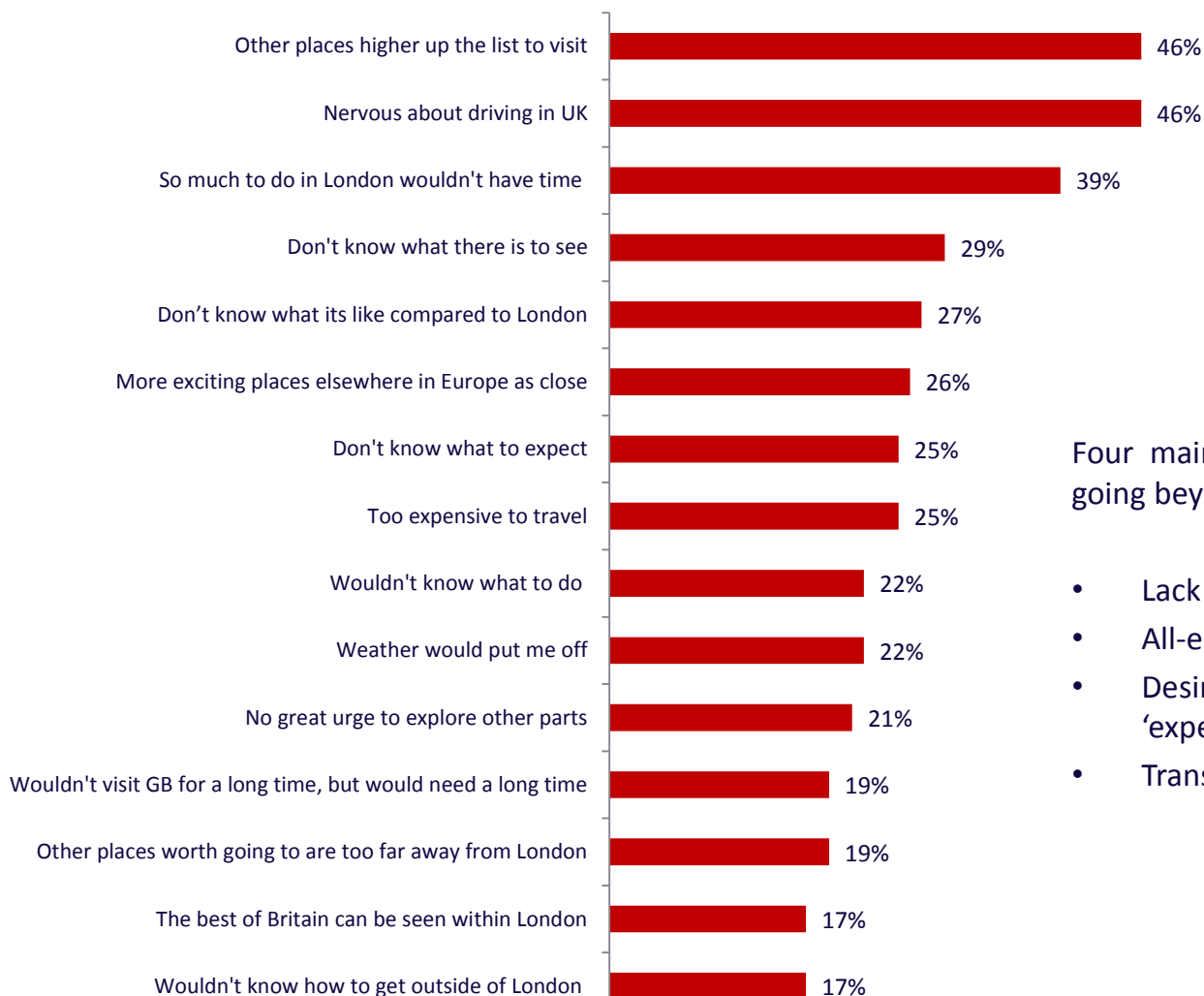
### Top Ten Tips for promoting ‘London Plus’

1. Do not over-estimate geographical knowledge of Britain, or assume potential visitors will be aware of even high- profile destinations outside London.
2. Focus on the heritage, variety and countryside outside as well as unique places to stay and the British people .
3. Make sure the ‘experiences’ the destination offers (e.g. luxurious, adventurous) are reflected, and indicate how people will feel (e.g. relaxed) when there, as well as the attractions/ destinations themselves.
4. Do the work for visitors by putting together set itineraries, illustrating the ‘packages’ they could put together themselves.
5. Remind of enjoyment of previous trips to London and include London in suggested itineraries but build on appeal by showing that Britain can offer more than our capital , world famous headline sights on a second visit.
6. Showcase opportunities to relax, enjoy good food and unique/ unusual experiences and places to stay.
7. Avoid inadvertently re-enforcing out of date stereotypes of destinations
8. Compare Britain's offer favourably with similar, well-known ‘regional’ offers in other countries (e.g. Cotswolds/ Tuscany, York/ Seville, Scottish Highlands/ Swiss Alps, Cornish coast/ Spanish Costas) . Flag unique or ‘off-the-beaten-track’ experiences in Britain, away from mass tourist hotspots.
9. Avoid itineraries where driving/ hiring cars is essential (although in some markets this will appeal). Facilitate rail travel, e.g. highlight that booking trains ahead reduces cost considerably, or suggest the use of a BritRail pass.
10. Show travel times rather than distances from London (or between destinations) by train. Remember for most visitors tolerance is 2-3 hours travel time between destinations.



## Barriers to going beyond London: summary

Top reasons why recent 'London only' visitors have never spent nights in GB outside London



Four main themes emerged as barriers to going beyond London:

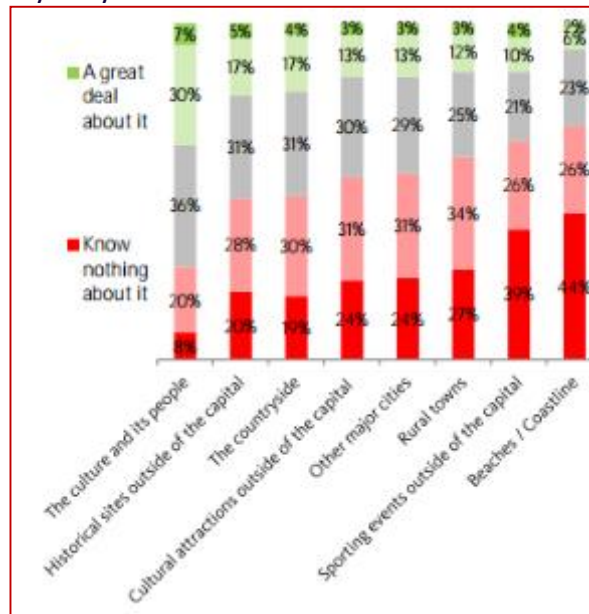
- Lack of knowledge
- All-encompassing London
- Desire to visit and the importance of 'experiences'
- Transport concerns

## Barriers to going beyond London: themes (1)

### 1) Lack of knowledge

Two issues are clear. Firstly there is often an ignorance of British destinations other than London i.e. what areas or towns visitors could consider. Secondly, even when individual destinations are named there is frequently a fundamental lack of knowledge about the experiences on offer and an inability to imagine the type of holiday they would be able to have there.

Claimed knowledge of Britain amongst recent visitors who had stayed only in London



### 2) All-encompassing London

The draw of London itself can, for some, deter them from going elsewhere in Britain. Two-fifths (39%) said they felt there was so much to do in London they wouldn't have time to go elsewhere and one in six (17%) said they thought the best of Britain could be seen within London so they wouldn't need to go elsewhere.

The issue here is perhaps length of stay and numbers on a first visit. If coming for a few days only, visitors may not feel there is time to do London 'justice' and go elsewhere. Attracting return visitors and longer stays is crucial to increase the nights visitors spend both in London and elsewhere. **How can we change perceptions of Britain as primarily a short break destination?**

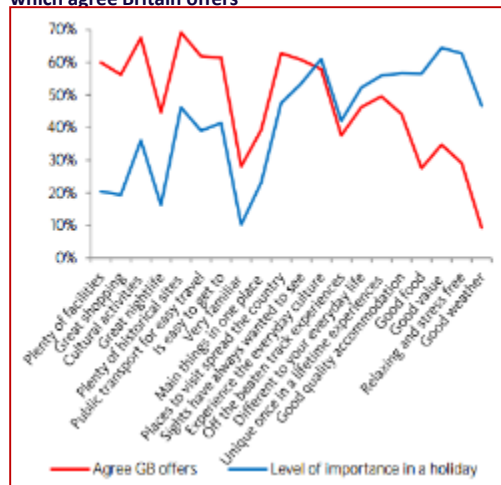
## Barriers to going beyond London: themes (2)

### 3) Desire to visit and the importance of ‘experiences’

In attracting return and longer visits it may be that ‘experiences’ are key. Consumers report they are increasingly seeking holidays that are experiential with everyday culture, food, accommodation and unique ‘once in a lifetime’ experiences being ranked as key to making a ‘great holiday’.

Britain performs less well on the more important factors of weather, relaxation, value, food, accommodation, unique experiences, being different to everyday life and offering ‘off the beaten track’ experiences.

Importance of various holiday aspects and extent to which agree Britain offers



As outlined earlier in this report, Britain in general, is perceived as a ‘sightseeing’ destination rather than an ‘experiential’ one, which results in a short trip and not necessarily returning once they have seen the sights they wished to ‘tick off’. However, those who had been further than London were more likely to see Britain as offering experiential holidays and as such take longer trips to Britain and more frequently.

### 4) Transport

The most common practical barriers identified by those who had not been beyond London were related to transport or access. Almost half (46%) said they would be nervous about driving in the UK and a quarter (25%) that it was too expensive to travel outside London.

Almost a fifth (19%) thought that other places ‘worth going to’ outside London would be too far from London, or if travelling elsewhere in Britain 15% said it was too difficult to get to other regions. 17% even said they wouldn’t know how to get outside London.

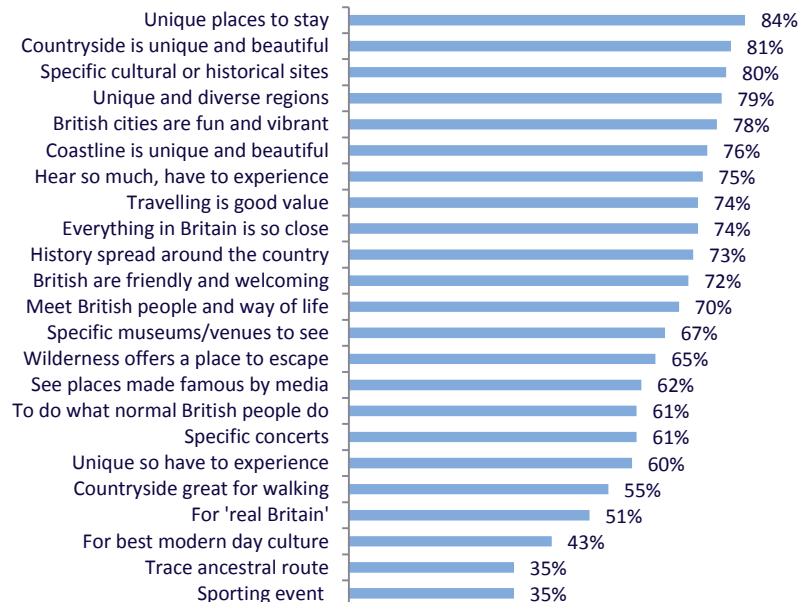
Around a quarter said there were more exciting places elsewhere in Europe which were as close to London as other British regions, perhaps reflecting a greater knowledge of transport to the continent than the extent of transport available within Britain.

## Appeal of going beyond London: summary

Reasons why recent visitors who did go beyond London did so



Aspects which would persuade recent 'London only' visitors to go beyond London



Six main themes emerged as hooks for going beyond London:

1. Heritage
2. Countryside
3. Uniqueness and variety
4. British people and way of life
5. Cities and culture
6. Trains, tours and packages

The following pages discuss these themes in more detail.

## Appeal of going beyond London: themes (1)

### 1) Heritage

History and heritage are strongly associated with Britain's holiday offer and the most common reason why those who went beyond London did so, given by 81%, was because Britain has history spread across the country, not just in London.

When discussing heritage, 'awe' and 'amazement' (especially those from the US) were common themes but also it seems that there was a danger it could seem a little flat if just about seeing / ticking off major sites – it is important to get across the 'experience' and the story behind a place.

### 2) Countryside

Three-quarters (78%) of those going beyond London gave Britain's unique and beautiful countryside as a reason for travel. Amongst those who had not been outside London, 81% said Britain's countryside would persuade them to do so – the second most popular factor. Coastline also appealed (76%).

Countryside was a major lever to convey 'unique, different, beautiful and relaxing. The 'bucolic beauty' of southern England was mentioned although there were concerns over access and how to get there. Coastline was generally less motivating, but Cornwall and South West were mentioned.

### 3) Uniqueness and variety

Britain's unique and varied nature is also appealing, with 80% of those who went beyond London saying they did so because Britain's diverse regions make for an interesting holiday. Having unique places to stay around the country was also a draw, a reason for 75% of those who had been outside London.

Amongst those who had not been outside London, unique places to stay was the most commonly cited aspect which would persuade them to do so, given by 84%.

### 4) British people and way of life

Over two-thirds of those who went beyond London mentioned the British people as a reason for travelling outside London. 70% wanted to meet the British people and see the British way of life and 67% because they were friendly and welcoming.

Amongst those who had only been to London, 49% had 'lots of interest' in culture and people outside London and the idea of British people being welcoming and seeing British way of life were factors which persuade around 70%.

## Appeal of going beyond London: themes (2)

### 5) Cities and culture

Of those who had been to London, a third (34%) had 'lots of interest' in major cities outside London and Britain's fun and vibrant cities were flagged as a factor which might persuade people to go outside London by over three-quarters (78%).

Britain's contemporary culture (music, art, fashion and food) also emerged as key elements of interest.

### 6) Trains, tours and packages

Most are willing to travel 2-3 hours from their initial base (typically London) to stay in another destination. With concerns about driving for many, preference is for train travel. Train was the most popular choice of transport when going between London / elsewhere – a fifth said rail passes would help.

Packaged tours and itineraries were also mentioned by many to enable them to get the most from the trip. Amongst those who had never been outside London, almost a fifth (18%) said if they did so they would want to be on an organised tour with their transport arranged. When asked what would make a 'London & Beyond' trip easier they were most likely to mention package tours with accommodation and transport all arranged (38%)

This again reflects insufficient knowledge of Britain among many visitors which inhibits their ability to independently organise multi-destination trips and highlights a potential gap for tours, packages and agents for at least suggested itineraries to facilitate trips outside London.

Useful aids to organise a 'London Plus' trip

	Recent 'London only' visitors	Recent visitors who went beyond London
Package tours with accommodation & transport from port / airport	38%	26%
Packages with all accommodation arranged	24%	27%
Rail passes	19%	21%
Packages which provide specific experiences	11%	14%
Themed tours with transport & attractions	8%	12%



## Further information

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