

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

Destination type report: a profile of overseas visitors who stay in England's different types of cities and towns

March 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.

This report aims to draw upon the most up-to-date research available. Given the requirement to present results at individual destination type level, **IPS data has been combined for 2013, 2014 and 2015** so that sample sizes for the smaller destination types remain robust.

The report refers to ‘target markets’. These are France, Germany, USA, Spain, Italy, Netherlands, Australia, The Nordics (Sweden, Norway, Denmark, Finland and Iceland) and China. Markets have been chosen due to their current high volume of visits to England, or (as is the case with China) their potential to visit England in the future.

Destination type - definitions

Destination Type	Individual Destinations
London	London (including all London boroughs except Greenwich)
Core Cities	Birmingham, Bristol, Leeds, Liverpool, Manchester, Newcastle, Nottingham, Sheffield
Urban Areas 200k+	ALL CORE CITIES PLUS Middlesbrough, Tyneside conurbation, Sunderland, Hull, Bradford, Greater Manchester conurbation, Stoke-on-Trent, West Midlands conurbation, Coventry, Derby, Leicester, Northampton, Luton, Norwich, South Glos., Plymouth, Portsmouth, Southampton
Heritage Cities	Bath, Cambridge, Canterbury, Carlisle, Chester, Durham, Greenwich, Lancaster, Lincoln, Oxford, Salisbury, Stratford-upon-Avon, York
Coastal Towns	Barrow, Stockton/Hartlepool, Berwick, Blackpool, Sefton, Scarborough, Tendring, Southend, Great Yarmouth, Isle of Wight, Penwith, Torbay, Weymouth, Bournemouth, Christchurch, Poole, Havant, Thanet, Dover, Shepway, Brighton, Eastbourne, Hastings, Chichester, Worthing
Other Towns*	Other pre-dominantly urban areas in England (see Appendix for full list)
Other Rural*	Other pre-dominantly rural areas in England (see Appendix for full list)
Non-England	Destinations in Scotland, Wales or Northern Ireland

Executive summary

Executive summary / 1

What is the overall size and shape of the market by destination type?

- The following proportions of overseas holiday visitors to the UK stay in each of these destination types for at least one night:
 - 9% stay in urban areas which have a population of at least 200k (1.2m visitors)
 - 7% staying in one of the eight core cities (0.9m visitors)
 - 7% stay in a heritage city (0.9m visitors)
 - 6% stay in a coastal town (0.7m visitors)
 - 9% stay in an 'other town' (1.2m visitors)
 - 7% stay in a rural destination (0.8m visitors)
- Holiday visitors make up significant proportions of visitors staying in each of coastal towns (45%), heritage cities (43%) and to a lesser extent, rural areas (35%) – although this is still lower than among those staying in London (50%)
- Those on a holiday trip make up a much lower proportion of those staying in major urban areas (22%) – many business visitors - and other towns (24%) – many staying with friends / relatives.
- After London, Manchester (268k), Brighton (211k), Bath (208k) and Liverpool (198k) attracted the highest number of staying holiday visitors in 2015.
- Four of the eight core cities are represented within the top 12 individual destinations, along with five heritage cities and two coastal towns (Brighton and Hastings)
- Top destinations in each region:
 - Bath (South West), Brighton (South East)
 - Newcastle (North East), Manchester (North West), York (Yorkshire)
 - Birmingham (West Midlands), Nottingham (East Midlands), Cambridge (East)

Executive summary / 2

What is the origin of England's holiday visitors by destination type?

- European representation among holiday visitors is much higher among those staying in destinations outside of London, especially in coastal towns (84%)
- Other than coastal towns, other non-London destination types typically see two-thirds of staying visitors as European, 10%-14% from North America and around a fifth from the Rest of the World
- North American visitors (20%) are particularly well represented among those staying in UK destinations outside of England
- There is a distinctive profile of those staying in coastal towns – 28% are from Germany, 13% from France and 9% from Netherlands. Indeed, visitors from Germany and the Netherlands (and to a lesser extent, Australia) are more likely to be represented among those staying in every destination type outside of London than in London itself
- The reverse is true for holiday visitors from Italy and Spain – they are usually more likely to be seen in London than in other destination types
- Visitors from the USA (12%) and France (13%) are well represented in heritage cities compared with other destination types
- Holiday visitors from Germany (18%), Netherlands (12%) and Australia (8%) are also well represented among those staying in rural destinations
- The USA (16%) and Germany (15%) are also very well represented among those staying in destinations outside of England during their holiday trip

Executive summary / 3

How else do England's holiday visitors vary by destination type?

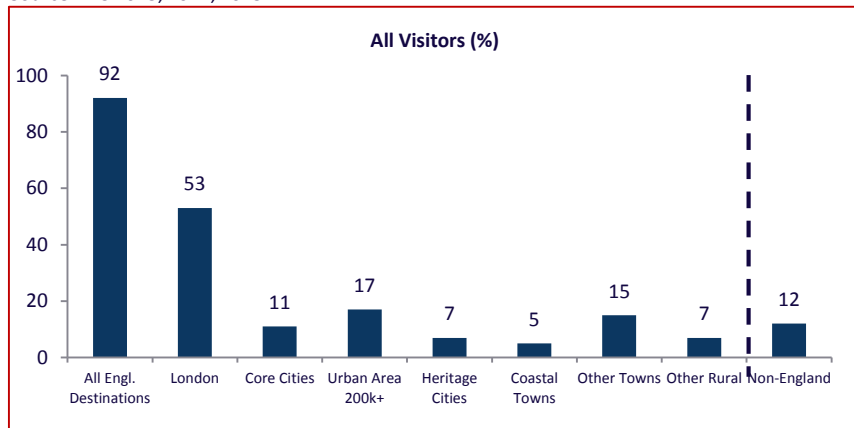
- Overnight holiday stays in any of the destination types outside of London are more likely to take place during the peak July-September period (typically 40%-44% of trips). This is particularly the case for rural destinations, where 50% of those staying do so in this July-September period
- Whilst only 17% of holiday visitors who stay in London during their trip have a total holiday length of more than 7 nights, this is much higher among those staying in non-London destinations – typically around 40% tend to stay more than 7 nights in total, although this rises to 54% among those staying in rural destinations (including 22% who stay at least 15 nights)
- Package holidays are much more common among those staying in coastal towns (28%) and heritage cities (23%) than among holiday trips to England overall (17%)
- The age profile of holiday visitors to England varies significantly by destination type:
 - For holiday visitors staying in London and other major urban areas, the age profile is much younger, with typically 40% of visitors aged under 35 years
 - Visitor age profile is much older among those staying in heritage cities, coastal towns and especially, rural areas (where 36% are aged 55 years or over)
- Families (visitors with a child aged under 16 in their party) on holiday trips to the UK are more likely to stay in non-London destinations than other types of visitor. Families are more likely than other visitors to stay in each type of non-London destination
- Within London (73%) and other major urban areas (59%) – especially core cities (63%) – the majority of visitors stay in hotels. Although still fairly high in heritage cities (54%), hotel stays are much less common in each of coastal towns (45%), other towns (44%) and rural areas (40%)

What is the overall size and shape of the market by destination type?

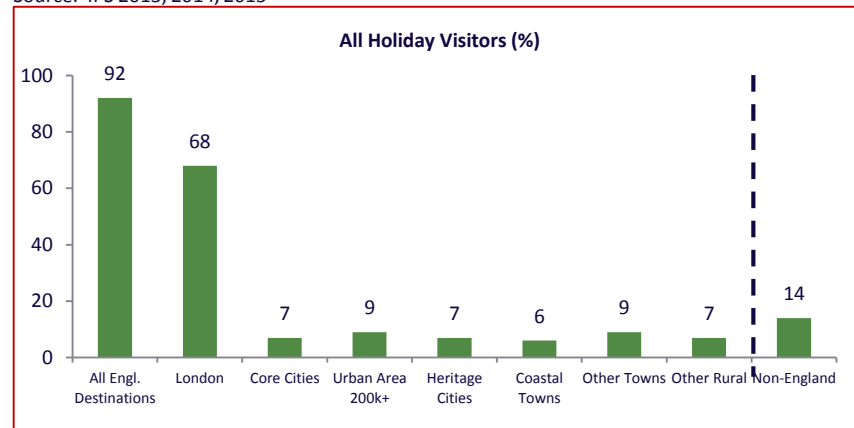
Data taken from International Passenger Survey (IPS) – combined data from 2013, 2014 and 2015

Proportion of UK visitors who stay in each type of destination (2013-15 average)

Source: IPS 2013, 2014, 2015



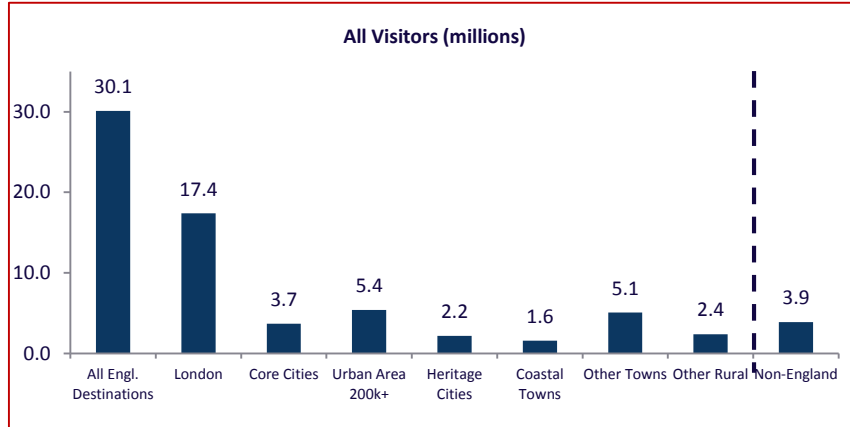
Source: IPS 2013, 2014, 2015



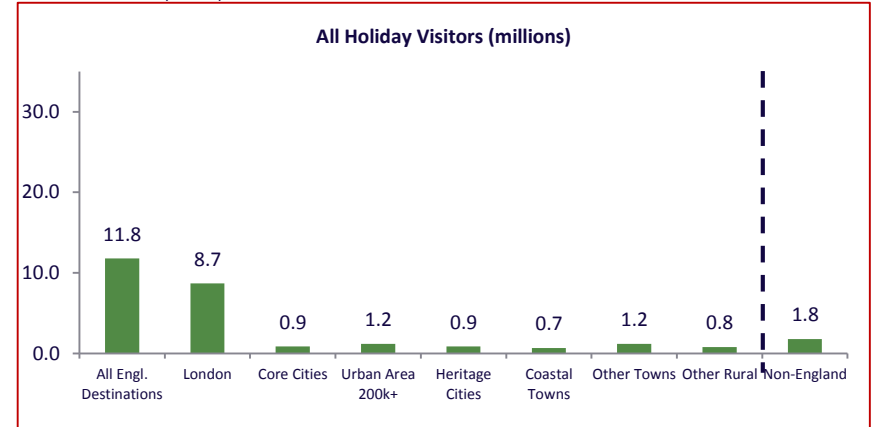
As context, we know that 32% of all holiday trips to England made by overseas visitors involve a stay outside of London. Holiday visitors to the UK are significantly less likely to stay overnight in destinations outside of London than those visiting for other reasons (primarily visiting friends / relatives or on business), especially to the large cities. Only 9% of holiday visitors to the UK stay overnight in an urban area with a population of 200k or more compared with 17% among visitors to the UK overall. Similarly, only 9% of holiday visitors stay in 'other towns' compared with 15% among visitors overall. However, likelihood of holiday visitors staying in each of heritage cities, coastal towns and other rural areas is as high as for visitors as a whole – around 5% to 7% of both holiday visitors and visitors as a whole staying in each of these.

Volume of UK visitors who stay in each type of destination (2013-15 average)

Source: IPS 2013, 2014, 2015



Source: IPS 2013, 2014, 2015



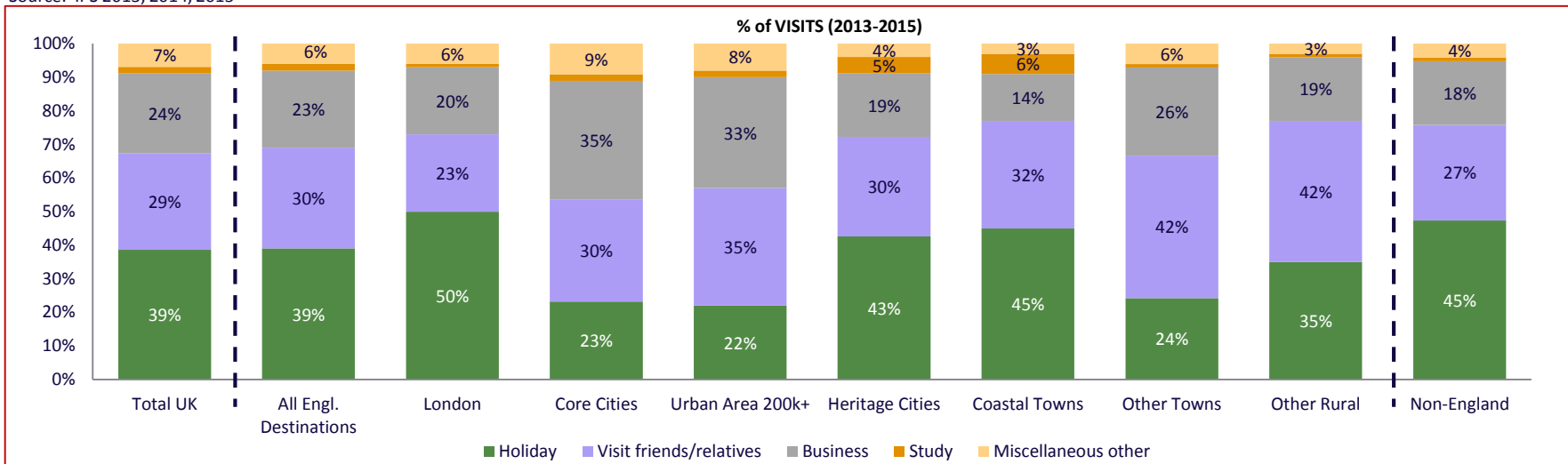
Over the 2013-15 period, an average of 11.8m overseas visitors stayed overnight in England.

8.7m of these visitors spent at least one night in London.

Annual overnight stays in other types of destination ranged from 0.7m in coastal towns up to 1.2m in major urban areas and 1.2m in 'other towns'.

Profile of visitors to destination types – by trip purpose

Source: IPS 2013, 2014, 2015



There is a strong representation of holiday visitors among those staying overnight in London (50%), coastal towns (45%), heritage cities (43%) and, to a lesser extent, other rural destinations (35%).

The representation of holiday visitors is much lower among those staying in urban areas of 200k+ population (22%) and within this, core cities (23%). Business travel represents a much larger proportion of visitors here – around a third.

‘Other towns’ also have a lower representation of holiday visitors, with those visiting friends / relatives (42%) accounting for the most significant proportion of visitors staying in these destinations. Those visiting friends / relatives also account for a large proportion of visitors staying in rural destinations (also 42%).

Destination type visit combinations for England’s holiday visitors

Source: IPS 2013,2014,2015

		Core Cities / Urban 200k+	Heritage Cities	Coastal Towns	Other towns	Other Rural
10% of all holiday trips to England include more than one destination type	London	25%	23%	13%	17%	16%
	Core Cities / Urban 200k+	-	12%	8%	12%	10%
	Heritage Cities	-	-	8%	11%	12%
	Coastal Towns	-	-	-	9%	10%
	Other Towns	-	-	-	-	13%

10% of all holiday trips to England include staying in more than one destination type during their trip – London being included as a destination type.

Within this, the most common combinations include London plus another destination type – especially major urban areas (25%) and heritage cities (23%).

Volumes of other destination type combinations are all fairly similar.

Top English cities/towns stayed in on holiday trips (2010-15)

Source: IPS

000s of visitors	Destination Type	2010	2011	2012	2013	2014	2015
1. London	London	7,325	7,616	7,649	8,509	8,914	9,210
2. Manchester	Core City	184	211	215	222	229	268
3. Brighton	Coastal Town	157	143	167	210	212	211
4. Bath	Heritage City	159	144	119	176	146	208
5. Liverpool	Core City	145	188	173	193	222	198
6. Birmingham	Core City	130	148	116	156	156	180
7. Oxford	Heritage City	165	181	140	167	193	180
8. Bristol	Core City	103	141	127	140	120	163
9. York	Heritage City	124	139	108	150	201	132
10. Cambridge	Heritage City	128	106	121	126	130	109
11. Hastings	Coastal Town	49	70	42	46	59	99
12. Canterbury	Heritage City	96	112	96	99	100	99

NB. IPS measures people who have 'stayed in' a town rather than 'visited'

After London, Manchester attracted the highest number of overseas holiday visitors in 2015, 268,000 in total. This represents an annual increase each year since 2010. Manchester is followed by Brighton, Bath and Liverpool.

Four of the eight core cities are represented within the top 12 individual destinations, along with five heritage cities and two coastal towns.

Top towns stayed in on holiday trips - by region (1)

Source: IPS

SOUTH WEST (000s of visitors)	<i>Destination Type</i>	2010	2011	2012	2013	2014	2015
1. Bath	<i>Heritage City</i>	159	144	119	176	146	208
2. Bristol	<i>Core City</i>	103	141	127	140	120	163
3. Bournemouth	<i>Coastal Town</i>	67	59	71	69	51	68
4. Exeter	<i>Other Town</i>	52	28	28	48	52	64
5. Salisbury	<i>Heritage City</i>	50	56	54	80	57	47
6. Plymouth	<i>Urban 200k+</i>	72	65	63	75	52	44
7. Torbay	<i>Coastal Town</i>	42	44	35	39	51	36
8. St Ives	<i>Coastal Town</i>	49	41	23	34	34	36
9. Newquay	<i>Other Town</i>	28	35	28	35	58	34
10. Penzance	<i>Coastal Town</i>	30	18	32	26	26	34
11. Falmouth	<i>Other Town</i>	24	14	18	11	12	29
12. Weymouth	<i>Coastal Town</i>	13	25	16	17	11	21
13. Gloucester	<i>Other Town</i>	13	10	4	19	23	20

NB. IPS measures people who have 'stayed in' a town rather than 'visited'

N.B. Only towns shown are those recording 20,000 or more visitors in 2015. Generally, numbers within small towns are based on small sample sizes, so should be looked at indicatively i.e. general sizes and trends rather than year-on-year changes

Top towns stayed in on holiday trips - by region (2)

Source: IPS

SOUTH EAST (000s of visitors)	<i>Destination Type</i>	2010	2011	2012	2013	2014	2015
1. Brighton	<i>Coastal Town</i>	157	143	167	210	212	211
2. Oxford	<i>Heritage City</i>	165	181	140	167	193	180
3. Canterbury	<i>Heritage City</i>	96	112	96	99	100	99
4. Hastings	<i>Coastal Town</i>	49	70	42	46	59	99
5. Eastbourne	<i>Coastal Town</i>	54	53	35	51	64	74
6. Windsor	<i>Other Town</i>	58	80	58	54	77	68
7. Southampton	<i>Urban 200k+</i>	49	51	47	53	35	66
8. Portsmouth	<i>Urban 200k+</i>	35	50	29	47	36	53
9. Reading	<i>Other Town</i>	36	43	46	45	41	37
10. Dover	<i>Coastal Town</i>	45	65	64	54	81	36
11. Maidstone	<i>Other Town</i>	33	45	33	29	33	31
12. Folkestone	<i>Coastal Town</i>	20	12	28	26	31	30
13. Chichester	<i>Coastal Town</i>	20	21	22	18	26	26
14. Tunbridge Wells	<i>Other Town</i>	22	35	27	22	21	25
15. Winchester	<i>Other Town</i>	21	40	18	35	23	23

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Top towns stayed in on holiday trips - by region (3)

Source: IPS

NORTH EAST (000s of visitors)	<i>Destination Type</i>	2010	2011	2012	2013	2014	2015
1. Newcastle	<i>Core City</i>	73	86	71	68	80	91
2. Durham	<i>Heritage City</i>	16	14	18	18	13	24

NORTH WEST (000s of visitors)	<i>Destination Type</i>	2010	2011	2012	2013	2014	2015
1. Manchester	<i>Core City</i>	184	211	215	222	229	268
2. Liverpool	<i>Core City</i>	145	188	173	193	222	198
3. Chester	<i>Heritage City</i>	51	54	52	45	39	42
4. Windermere	<i>Other Rural</i>	26	23	28	34	43	32

YORKSHIRE (000s of visitors)	<i>Destination Type</i>	2010	2011	2012	2013	2014	2015
1. York	<i>Heritage City</i>	124	139	108	150	201	132
2. Leeds	<i>Core City</i>	51	64	59	48	67	60
3. Sheffield	<i>Core City</i>	30	24	15	20	23	32

NB. IPS measures people who have 'stayed in' a town rather than 'visited'

N.B. Only towns shown are those recording 20,000 or more visitors in 2015. Generally, numbers within small towns are based on small sample sizes, so should be looked at indicatively i.e. general sizes and trends rather than year-on-year changes

Top towns stayed in on holiday trips - by region (4)

Source: IPS

WEST MIDLANDS (000s of visitors)	Destination Type	2010	2011	2012	2013	2014	2015
1. Birmingham	Core City	130	148	116	156	156	180
2. Stratford-upon-Avon	Heritage City	28	72	44	55	73	61
3. Coventry	Urban 200k+	35	35	22	36	15	27

EAST MIDLANDS (000s of visitors)	Destination Type	2010	2011	2012	2013	2014	2015
1. Nottingham	Core City	48	60	45	49	37	38
2. Leicester	Urban 200k+	27	25	21	22	19	35

EAST OF ENGLAND (000s of visitors)	Destination Type	2010	2011	2012	2013	2014	2015
1. Cambridge	Heritage City	128	106	121	126	130	109
2. Norwich	Urban 200k+	26	22	24	23	37	34
3. Ipswich	Other Town	12	12	15	26	9	20

NB. IPS measures people who have 'stayed in' a town rather than 'visited'

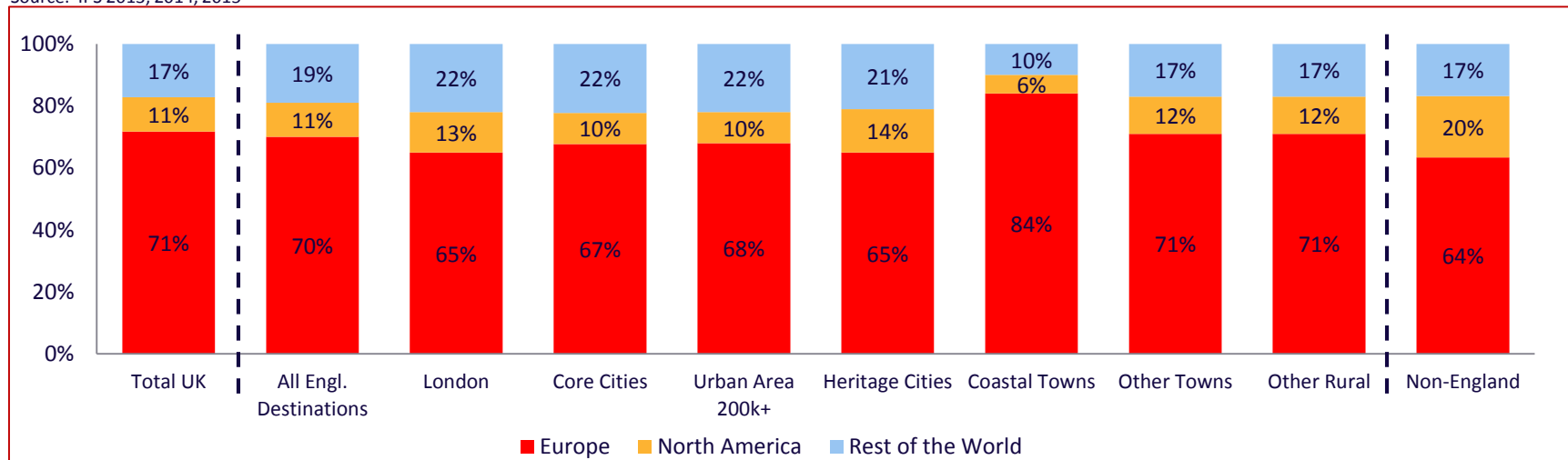
N.B. Only towns shown are those recording 20,000 or more visitors in 2015. Generally, numbers within small towns are based on small sample sizes, so should be looked at indicatively i.e. general sizes and trends rather than year-on-year changes

What is the origin of England's holiday visitors by destination type?

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

Source markets for England holiday trips – by destination type (world region)

Source: IPS 2013, 2014, 2015



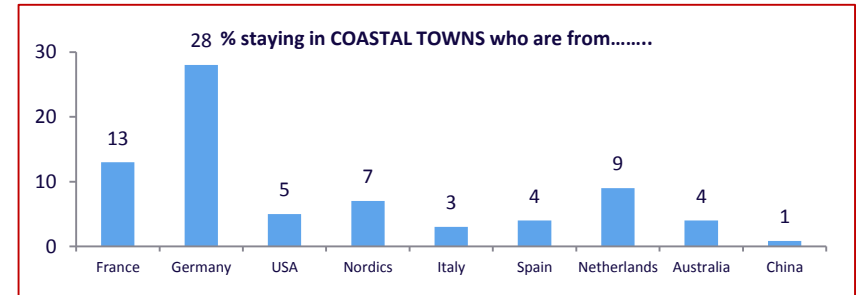
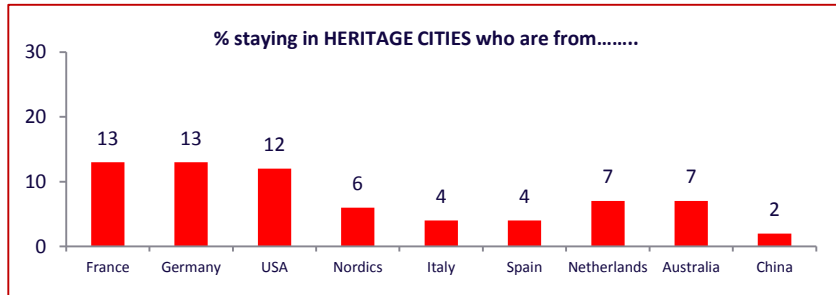
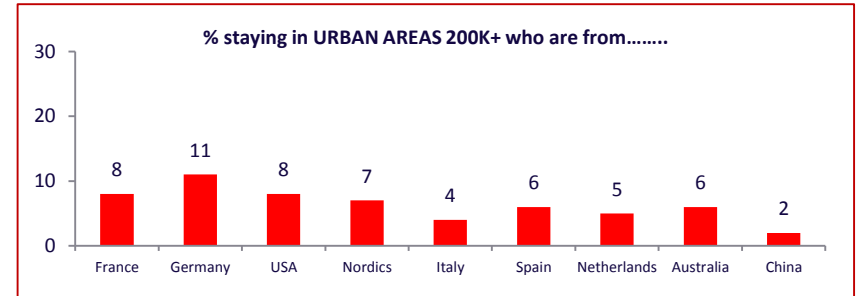
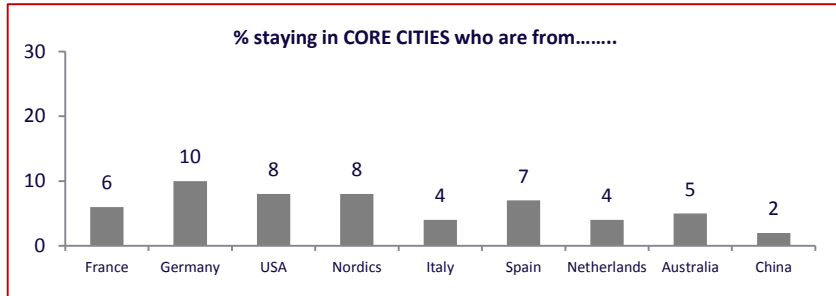
70% of those staying in England on a holiday trip are from Europe. European representation is higher among those staying in destinations outside of London, especially in coastal towns (84%). Coastal towns currently have limited appeal for the North American (6%) or Rest of the World (10%) markets.

Other destination types outside of London have similar representation of European (around two-thirds), North American (10%-14%) and Rest of the World (around a fifth) staying visitors.

North American visitors (20%) are particularly well represented among those staying in UK destinations outside of England.

Source markets for holiday trips in England – by destination type / 1

Source: IPS 2013, 2014, 2015

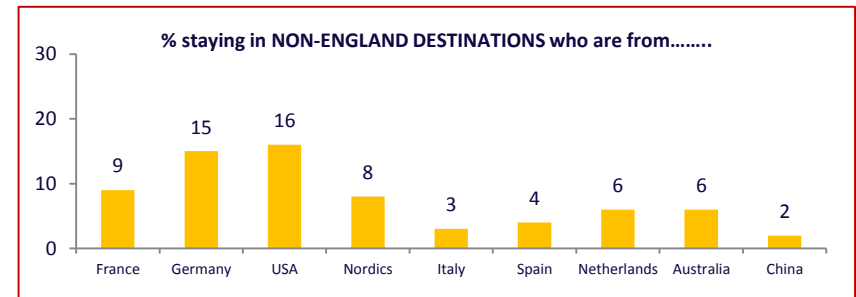
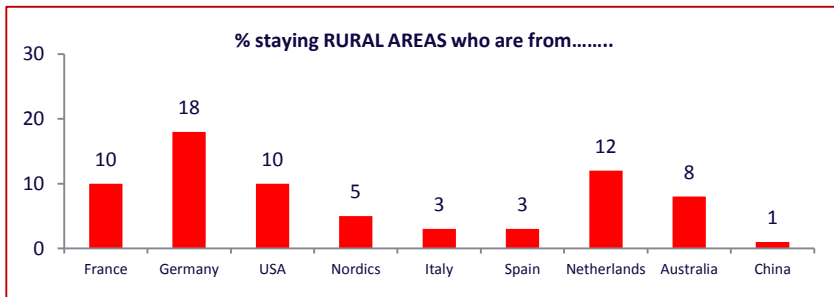
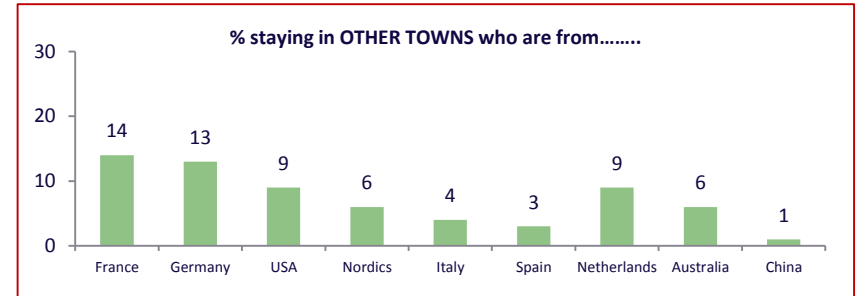
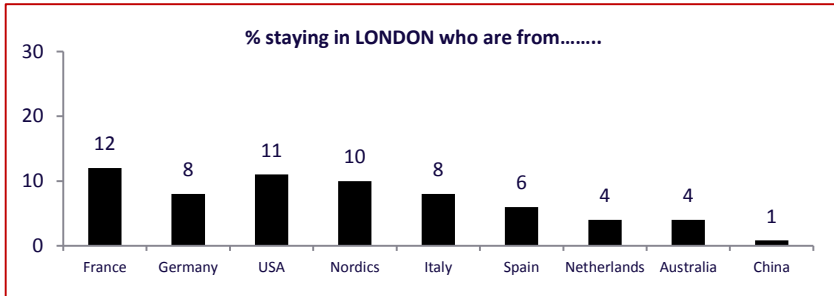


In more detail, there is a distinctive profile of those staying in coastal towns – 28% are from Germany (much higher than for any other destination type), 13% from France and 9% from the Netherlands.

Visitors from the USA (12%) and France (13%) are well represented in heritage cities compared with other destination types.

Source markets for holiday trips in England – by destination type / 2

Source: IPS 2013, 2014, 2015

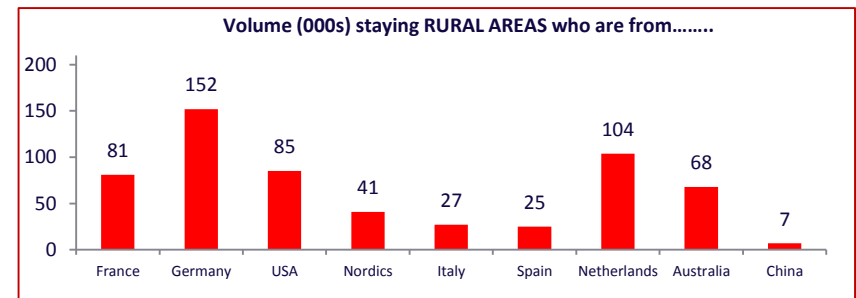
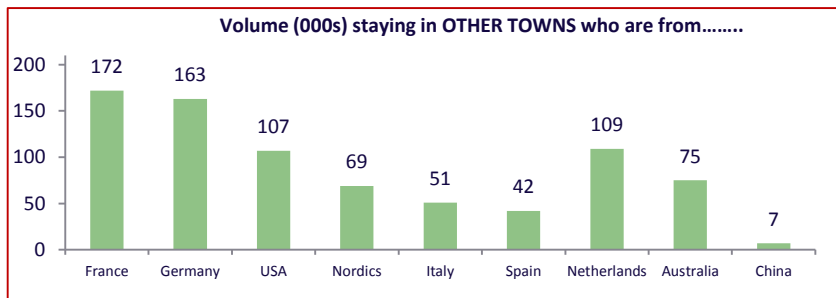
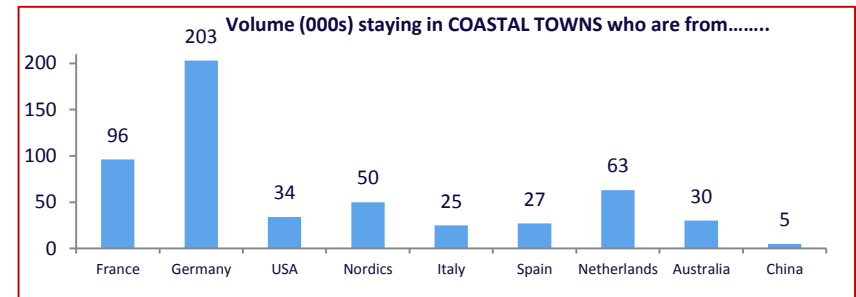
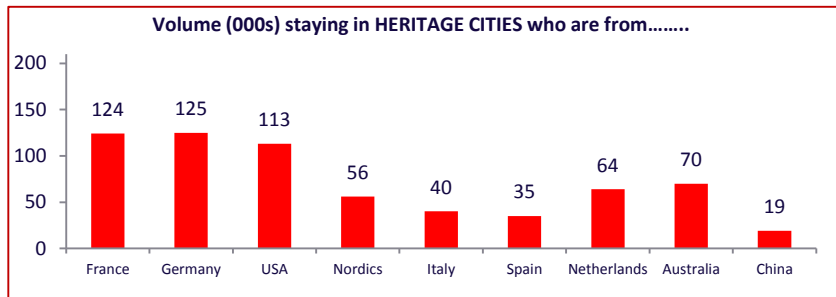
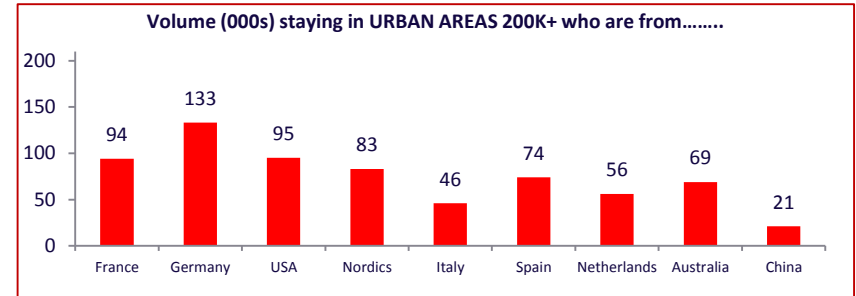
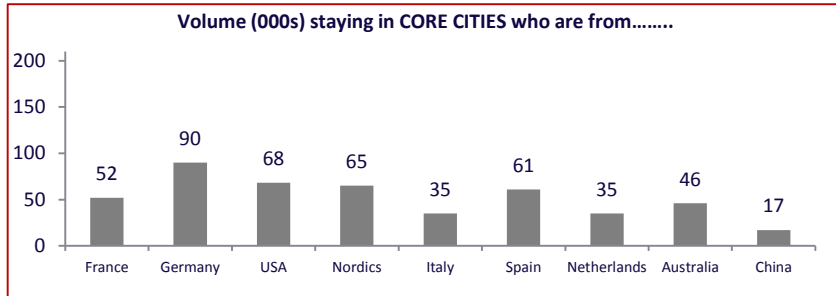


Holiday visitors from Germany (18%), Netherlands (12%) and Australia (8%) are also well represented among those staying in rural destinations compared with their representation elsewhere.

The USA (16%) and Germany (15%) are also very well represented among those staying in destinations outside of England during their trip.

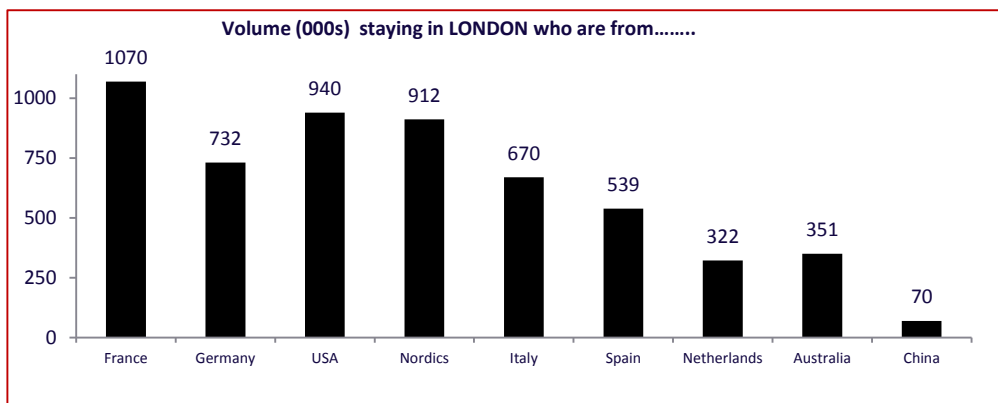
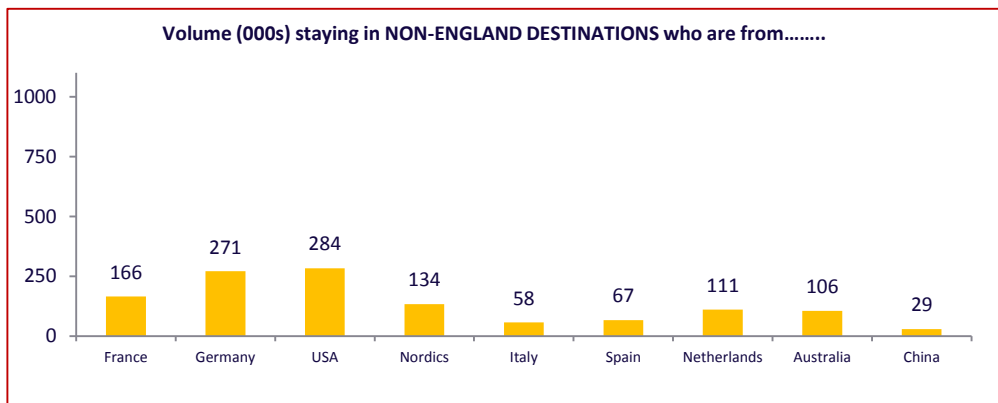
Source markets for holiday trips in England – volume of visitors/ 1

Source: IPS 2013, 2014, 2015



Source markets for holiday trips in England – volume of visitors / 2

Source: IPS 2013, 2014, 2015

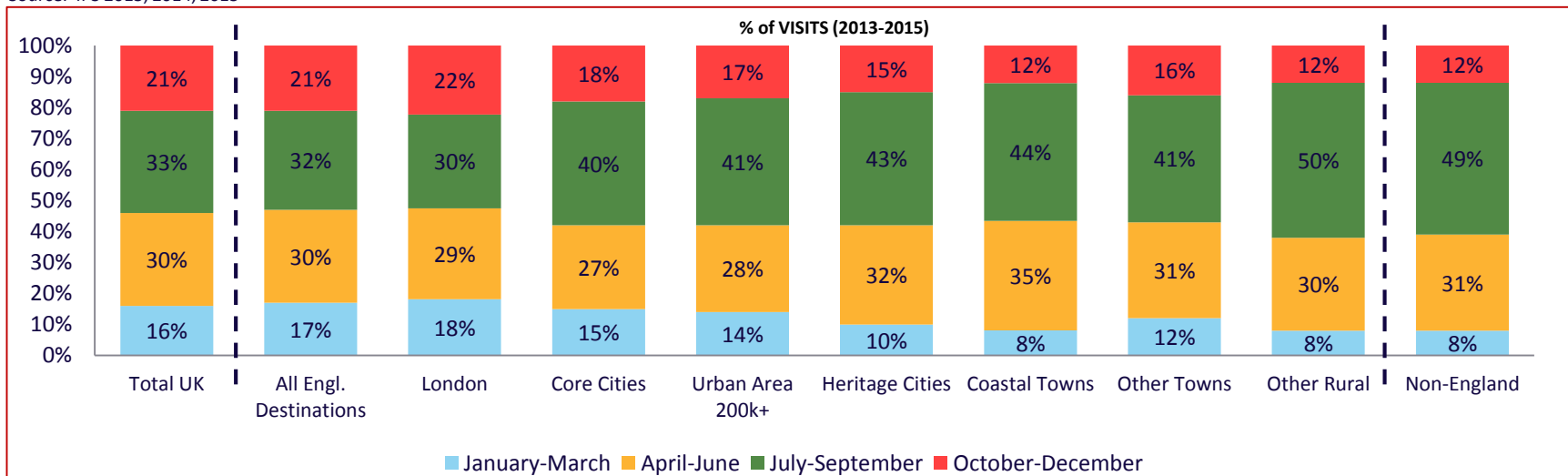


How else do England's holiday visitors vary by destination type?

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

Seasonality of holiday stays – by destination type

Source: IPS 2013, 2014, 2015

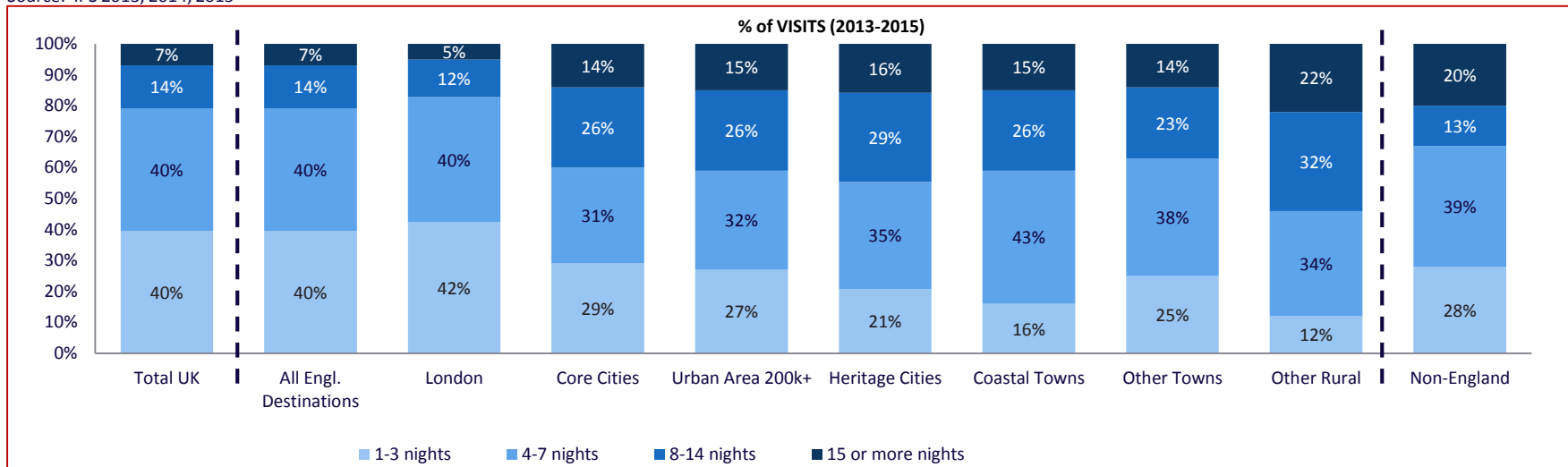


Overnight holiday stays in any of the destination types outside of London are more likely to take place during the peak July-September period and much less likely to take place in the off-peak October-March period. This is particularly the case for rural destinations, where 50% of those staying do so during the July-September period compared with just 32% among holiday visitors to England overall. These figures are similar for stays in destinations outside of England.

For other destination types outside of London, between 40% and 44% stay during the July-September period compared with 30% in London.

Length of holiday stays in UK – by destination type

Source: IPS 2013, 2014, 2015



N.B. Length of stay represents the total number of nights spent IN THE UK by visitors, not the number of nights spent in each destination type

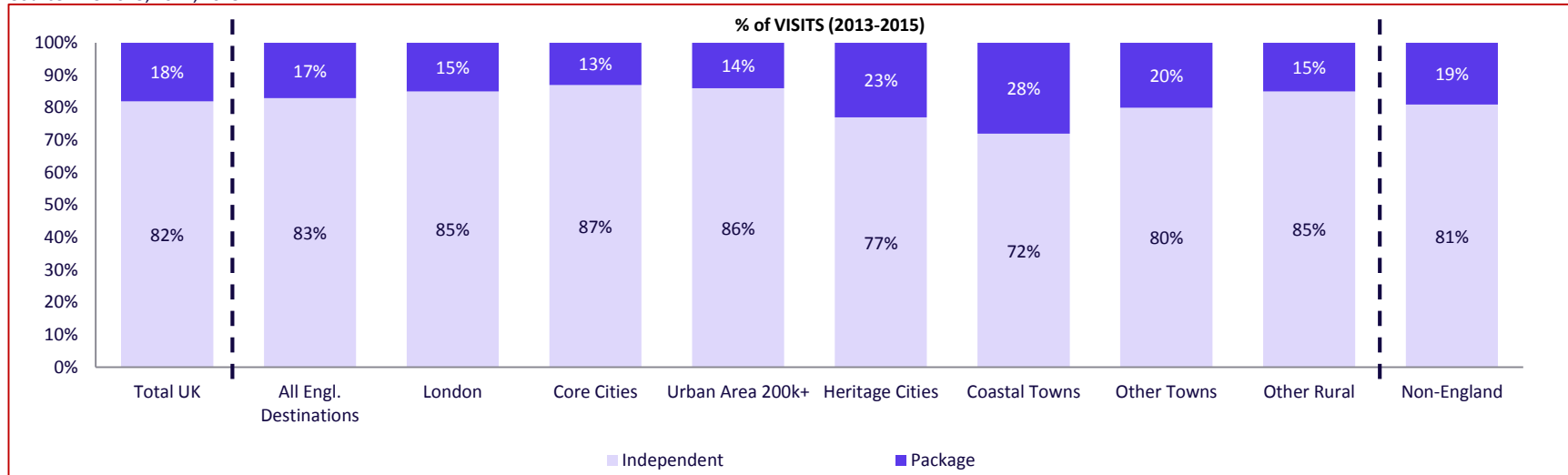
Whilst only 17% of holiday visitors who stay in London during their trip have a total holiday length of more than 7 nights, this greater length of stay is much more common among those who stay outside of London (although many of these will stay in both London and other destinations in England).

Those staying in rural destinations tend to have a particularly extended holiday, with 54% staying for a holiday of more than 7 nights, including 22% who stay at least 15 nights.

Of the other non-London destination types in England, around 40% tend to stay more than 7 nights in total with around 15% staying at least 15 nights. This is slightly higher among those who stay in heritage cities, where 45% stay at least 7 nights in total during their holiday.

Type of holiday – by destination type

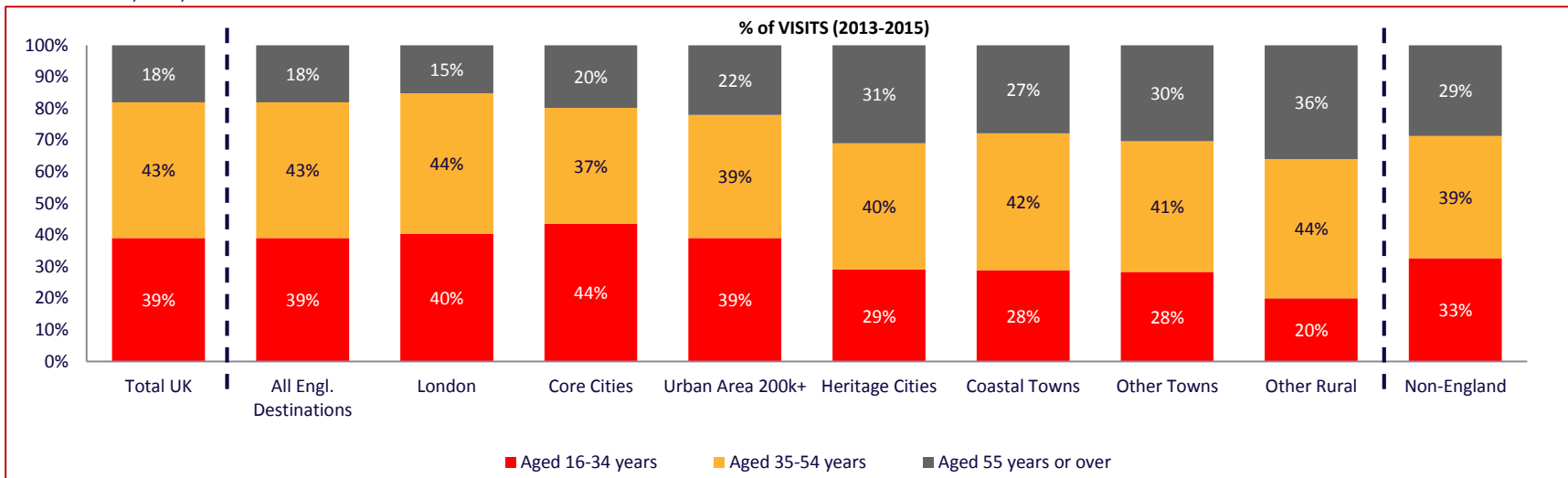
Source: IPS 2013, 2014, 2015



Across holiday trips to England overall, 17% are organised through a package. However, this is much higher among those who stay in coastal towns (28%) and heritage cities (23%) and slightly higher among those who stay in 'other towns'.

Age of holiday visitors staying in UK – by destination type

Source: IPS 2013, 2014, 2015

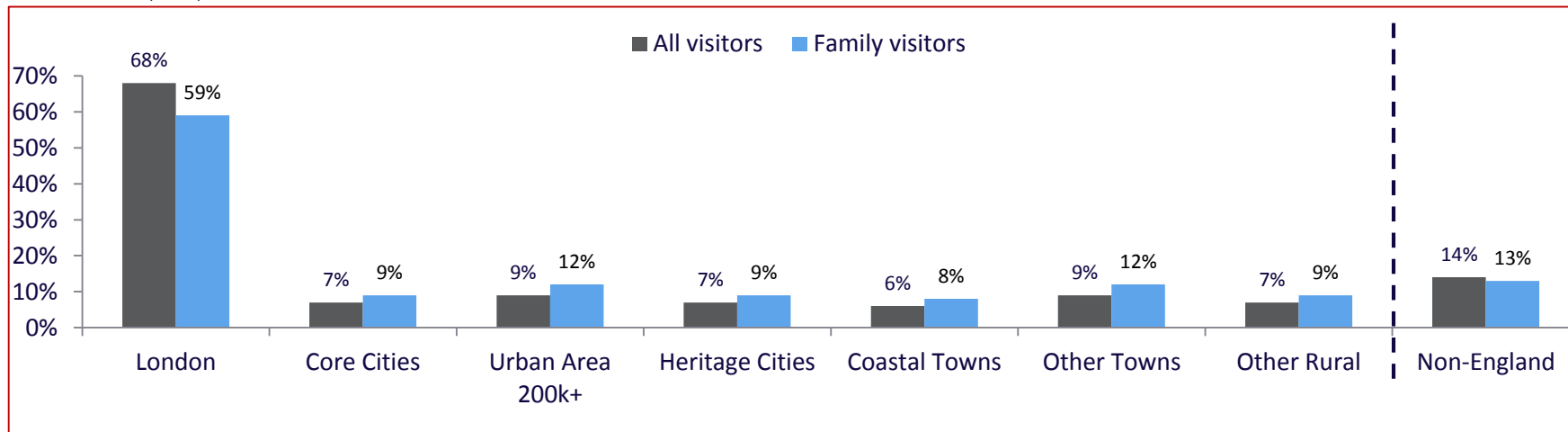


The age profile of holiday visitors to England varies significantly by destination type.

- For holiday visitors staying in London and the other major urban areas (whether core cities or other major urban areas), the age profile is much younger, with typically around 40% aged under 35 years. However, this is particularly the case among visitors to the core cities (44%). There is a low proportion of visitors aged 35-54 years in the major urban areas outside of London
- Visitor age profile is much older among those staying in heritage cities, coastal towns, other towns and especially, rural areas. Visitors aged over 55 years are much more strongly represented, with as many as 36% of visitors from this age group among those staying in rural areas (only 20% are aged under 35 years here)

Incidence of staying holiday visits made by families in the UK – by destination type

Source: IPS 2013, 2014, 2015

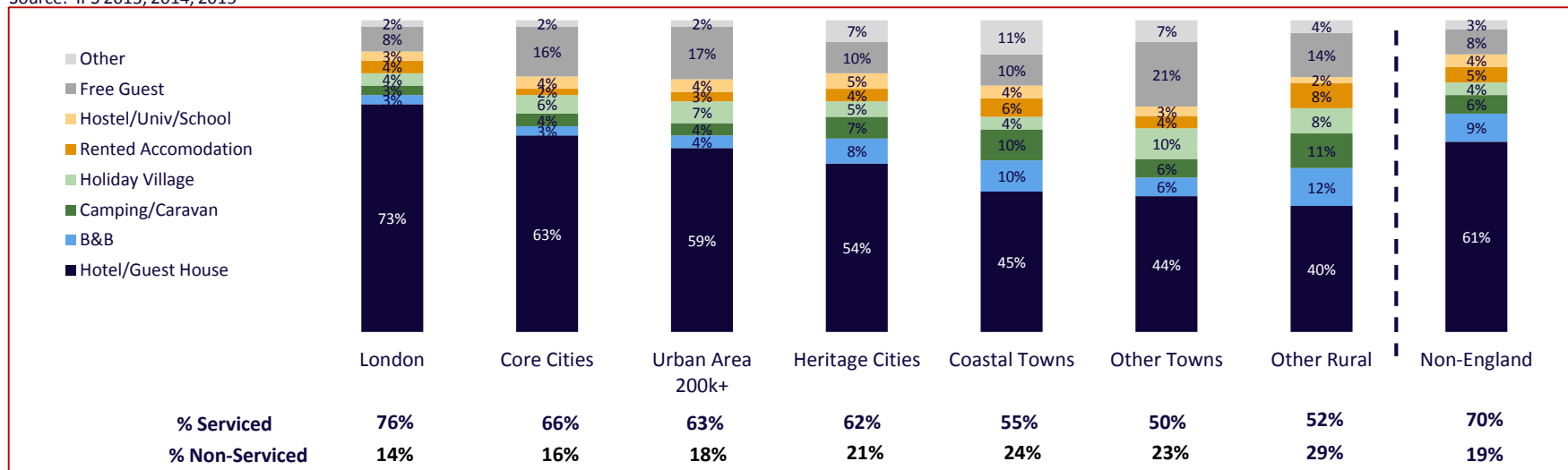


Families (visitors with a child aged under 16 in their party) on holiday trips to the UK are more likely to stay in non-London destinations than other types of visitor. For example, 9% of families are staying in a core city during their trip compared with just 7% of visitors overall. The gap between family visitors and visitors overall is similar for each non-London destination type.

Conversely, family visits are slightly less likely to occur to non-England destinations. 13% of family visitors to the UK on a holiday trip stay in non-England destinations compared with 14% of visitors overall.

Accommodation stayed in by holiday visitors – by destination type

Source: IPS 2013, 2014, 2015



The type of accommodation stayed in on holiday visits varies significantly by destination type. Within London (73%) and other major urban areas (59%) – especially core cities (63%) – the majority of visitors stay in hotels. There is also a notable proportion of those staying as ‘free guests’ in these major urban areas outside of London.

Although still fairly high within heritage cities (54%), hotel stays are much less common in each of coastal towns (45%), other towns (44%) and rural areas (40%). Stays in B&Bs and camping/caravan sites are still common in both coastal towns and rural areas, with ‘free guests’ high among those staying on ‘other towns’.

Destination Type Summaries

Core Cities - summary

Market Size (annual)

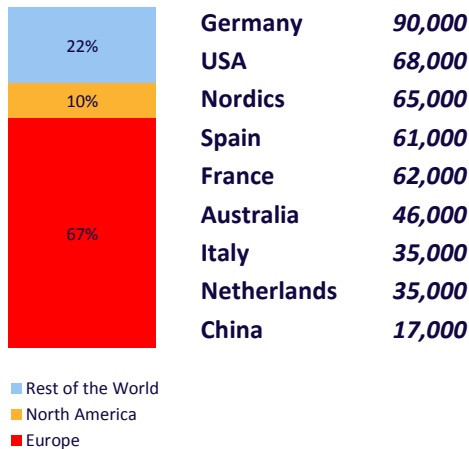
3.7 million overseas visitors (11% of all visitors to UK)

0.9 million holiday visitors (7% of UK holiday visitors)

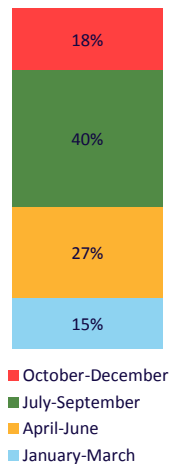
Most Visited Destinations (2015 holiday visitors only)

Manchester	268,000
Liverpool	198,000
Birmingham	180,000
Bristol	163,000
Newcastle	91,000
Leeds	60,000

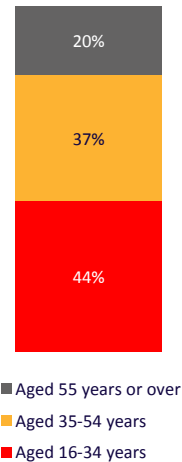
Source Markets (holiday)



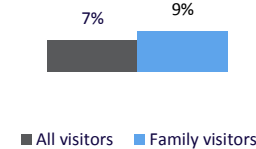
Seasonality



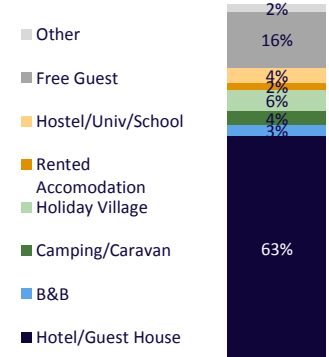
Age



Family Visitor Incidence



Accommodation



N.B. All data relates to annual averages 2013-15
Source: International Passenger Survey (2013-15)

Urban Areas (200k+ population)* - summary

Market Size (annual)

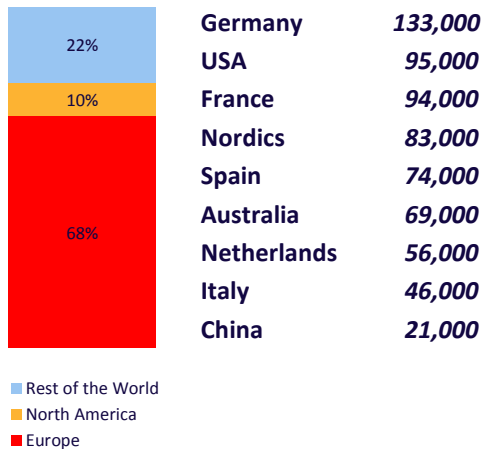
5.4 million overseas visitors (17% of all visitors to UK)

1.2 million holiday visitors (9% of UK holiday visitors)

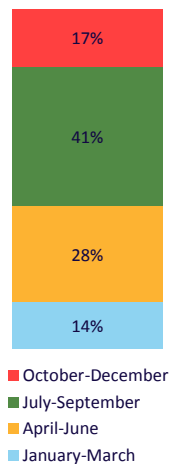
Most Visited Destinations (2015 holiday visitors only)

Manchester	268,000
Liverpool	198,000
Birmingham	180,000
Bristol	163,000
Newcastle	91,000
Southampton	66,000

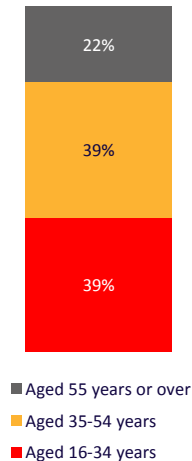
Source Markets (holiday)



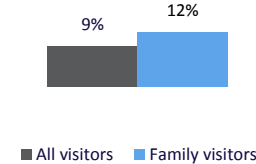
Seasonality



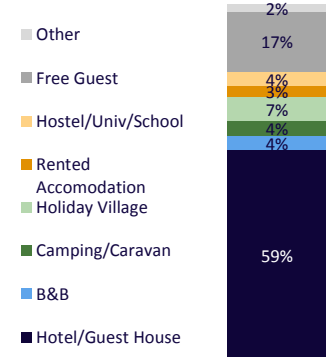
Age



Family Visitor Incidence



Accommodation



N.B. All data relates to annual averages 2013-15
Source: International Passenger Survey (2013-15)

Heritage Cities - summary

Market Size (annual)

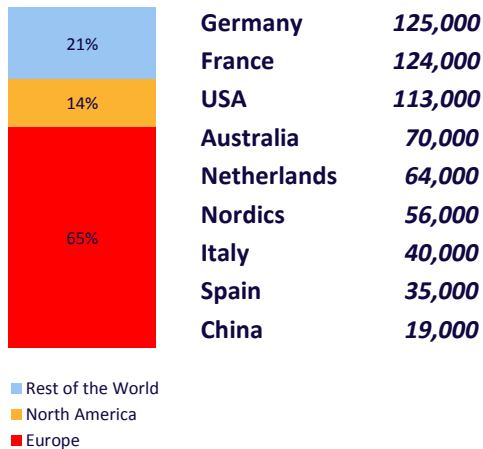
2.2 million overseas visitors (7% of all visitors to UK)

0.9 million holiday visitors (7% of UK holiday visitors)

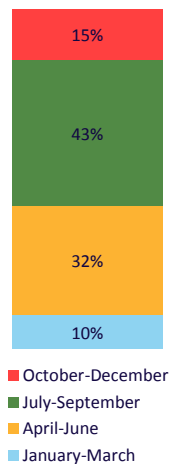
Most Visited Destinations (2015 holiday visitors only)

Bath	208,000
Oxford	180,000
York	132,000
Cambridge	109,000
Canterbury	99,000
Stratford	61,000

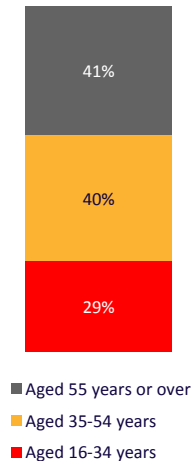
Source Markets (holiday)



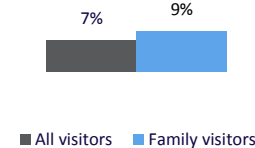
Seasonality



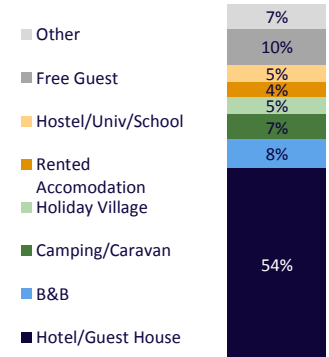
Age



Family Visitor Incidence



Accommodation



N.B. All data relates to annual averages 2013-15
Source: International Passenger Survey (2013-15)

Coastal Towns - summary

Market Size (annual)

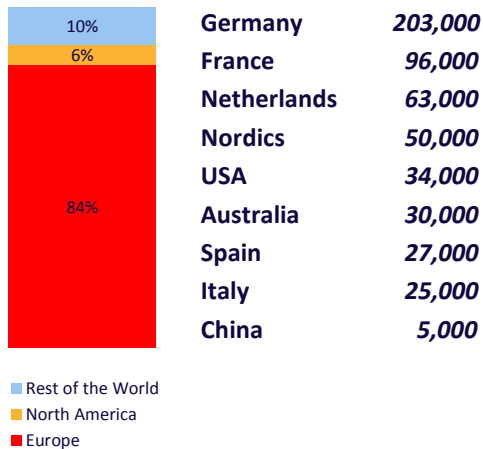
1.6 million overseas visitors (5% of all visitors to UK)

0.7 million holiday visitors (6% of UK holiday visitors)

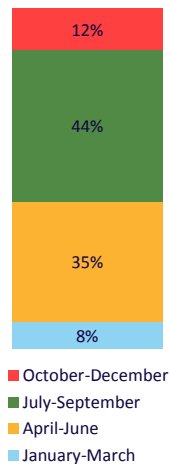
Most Visited Destinations (2015 holiday visitors only)

Brighton	211,000
Hastings	99,000
Eastbourne	74,000
Bournemouth	68,000
Torbay	36,000
St.Ives	36,000
Dover	36,000

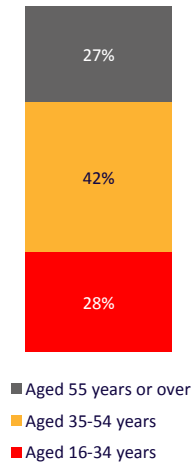
Source Markets (holiday)



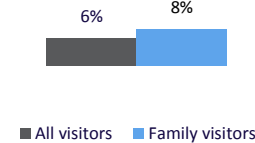
Seasonality



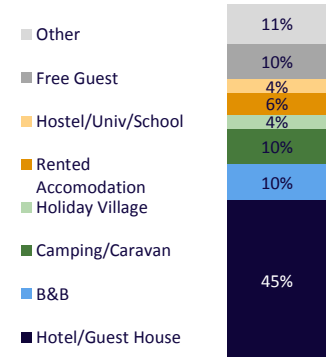
Age



Family Visitor Incidence



Accommodation



N.B. All data relates to annual averages 2013-15
Source: International Passenger Survey (2013-15)

Other Towns - summary

Market Size (annual)

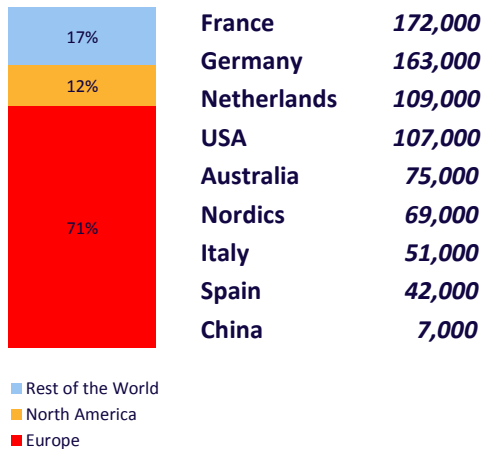
5.1 million overseas visitors (15% of all visitors to UK)

1.2 million holiday visitors (9% of UK holiday visitors)

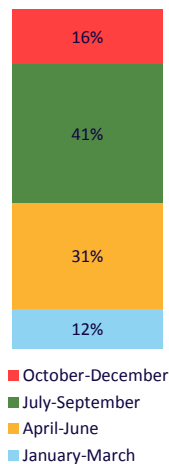
Most Visited Destinations (2015 holiday visitors only)

Windsor	68,000
Exeter	64,000
Reading	37,000
Newquay	34,000
Maidstone	31,000
Falmouth	29,000

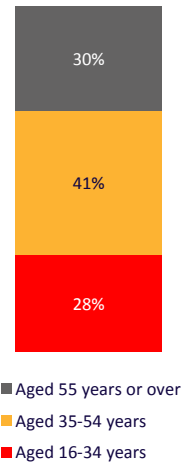
Source Markets (holiday)



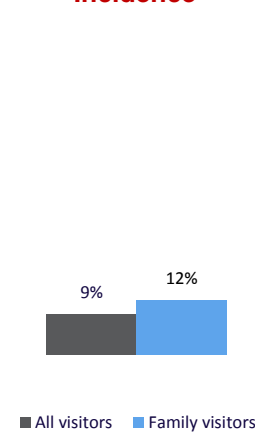
Seasonality



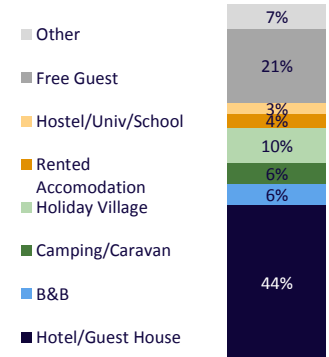
Age



Family Visitor Incidence



Accommodation



N.B. All data relates to annual averages 2013-15
Source: International Passenger Survey (2013-15)

Rural Destinations - summary

Market Size (annual)

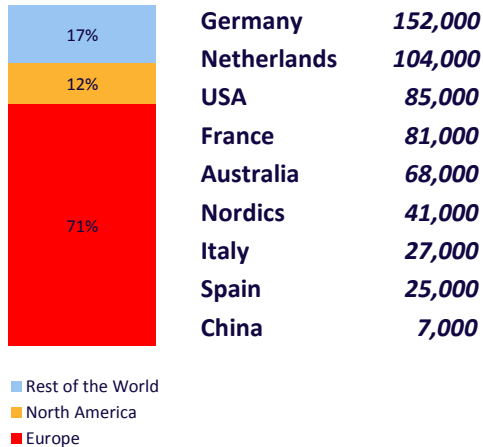
2.4 million overseas visitors (7% of all visitors to UK)

0.8 million holiday visitors (7% of UK holiday visitors)

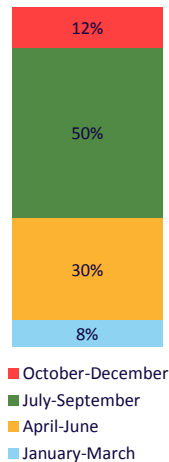
Most Visited Destinations (2015 holiday visitors only)

N/A

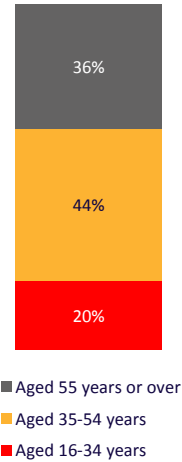
Source Markets (holiday)



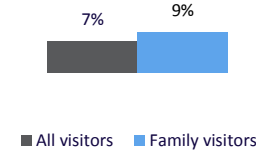
Seasonality



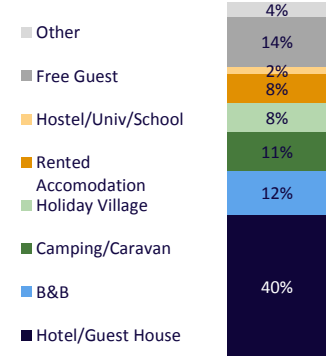
Age



Family Visitor Incidence



Accommodation



N.B. All data relates to annual averages 2013-15
Source: International Passenger Survey (2013-15)



Further information

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Steve.mills@bdrc-continental.com

Appendix

OTHER TOWNS

Adur/Arun/Chichester/Crawley/Horsham/Mid Sussex
 Alnwick
 Ashfield/Bassetlaw/Broxtowe/Gedling/Mansfield/Rushcliffe
 Ashford/Braintree/Dartford/Gravesham/Maidstone/Medway/Shepway/Swale/Thanet/Tonbridge & Malling
 Aylesbury Vale/Chiltern/Milton Keynes/S Bucks/Wycombe
 Barnsley
 Basildon/Braintree/Brentwood/Castle Point/Chelmsford/Epping
 Forest/Harlow/Maldon/Rochford/Tending/Thurrock/Uttlesford
 Basingstoke and Deane
 Bedford
 Blackburn with Darwen
 Boston
 Bracknell Forest/Slough/West Berkshire/Wokingham
 Bromsgrove/Herefordshire/Redditch/Wychavon/Wyre Forest
 Broxbourne/Dacorum/E Hertfordshire/Hertsmere/N Hertfordshire/Three Rivers/Watford/Welwyn Hatfield
 Carrick
 Cheltenham
 Cherwell
 Chorley/Hyndburn/Rossendale/Ribble Valley/Fylde/W Lancs/South Ribble/Burnley/Pendle/Wyre
 Colchester
 Crewe and Nantwich/Vale Royal/Macclesfield/Congleton/Halton/Warrington/Ellesmere
 Darlington/Sedgefield/Teesdale/Chester-Le-Street/Durham/Derwentside/Wear Valley/Easington
 Doncaster
 Eastleigh
 Elmbridge/Epsom & Ewell/Guildford/Mole Valley/Reigate & Banstead/Runnymede/Spelthorne/Surrey
 Heath/Tandridge/Waverley/Wo
 Exeter
 Gloucester
 Guildford
 Harrogate
 Ipswich
 King's Lynn & West Norfolk
 Kirklees/Wakefield/Calderdale/
 Lichfield
 Maidstone
 Maidstone/Tunbridge Wells
 Mole Valley
 Newark and Sherwood
 Newcastle-under-Lyme
 Nuneaton & Bedworth
 Oswestry
 Peterborough
 Preston
 Reading
 Redcar and Cleveland
 Rotherham
 Rugby
 Sefton/Wirral/St Helens/Knowsley
 Sevenoaks
 Shrewsbury And Atcham
 St Albans
 Stafford
 Stroud
 Tamworth
 Taunton Deane
 Telford & Wrekin
 Test Valley
 Tewkesbury
 Warwick
 Winchester
 Windsor and Maidenhead
 Worcester

OTHER RURAL

Allerdale
 Allerdale/South Lakeland/Eden/Copeland
 Amber Valley/Bolsover/Chesterfield/Derbyshire Dales/Erewash/High Peak/NE Derbyshire/S Derbyshire
 Babergh/Forest Heath/Mid Suffolk/St Edmundsbury/Suffolk Coastal/Waveney
 Blaby/Charnwood/Harborough/Hinckley And Bosworth/Melton/NW Leicestershire/Rother/Rutland
 Breckland/Broadland/N Norfolk/S Norfolk
 Bridgnorth/N Shropshire/Shropshire/S Shropshire/Telford and Wrekin
 Cannock Chase/E Staffordshire/S Staffordshire/Stafford/Staffordshire Moorlands
 Caradon/Carrick/Isles of Scilly/Kerrier/North Cornwall/Penwith/Restormel
 Cherwell/S Oxfordshire/Vale of White Horse/W Oxfordshire
 Copeland
 Corby/Daventry/E Northamptonshire/Kettering/S Northamptonshire/Wellingborough
 Cotswold
 Craven
 Derbyshire Dales
 E Cambridgeshire
 E Cambridgeshire/Fenland/Huntingdonshire/South Cambridgeshire
 E Devon
 E Devon/Mid Devon/N Devon/S Hams/Teignbridge/Torridge/W Devon
 E Dorset/W Dorset
 E Hampshire/Fareham/Gosport/Hart/New Forest/Rushmoor/Test Valley
 E Lindsey
 E Lindsey/N Kesteven/S Holland/S Kesteven/W Lindsey
 East Devon
 East Riding of Yorkshire
 East Staffordshire
 Eden
 Forest Heath
 Forest of Dean/Cotswold
 Fylde
 Herefordshire
 High Peak
 Kennet
 Kennet/N Wiltshire/Swindon/W Wiltshire
 Lewes/Rother/Wealden
 Malvern Hills
 Mendip
 Mendip/N Somerset/Sedgemoor/S Somerset/W Somerset

OTHER RURAL (CONTD.)

Mid Bedfordshire/S Bedfordshire
 N Cornwall
 N Devon
 N Dorset
 N Dorset/Purbeck
 N Norfolk
 N Somerset
 NE Lincolnshire/N Lincolnshire
 North Cornwall
 North Dorset
 North Somerset
 North Warwickshire
 Purbeck
 Restormel
 Richmondshire
 Rother
 Rutland
 S Hams
 S Holland
 S Kesteven
 S Oxfordshire
 Selby/Ryedale/Hambleton/Craven
 South Lakeland
 South Shropshire
 South Somerset
 St Edmundsbury
 Staffordshire Moorlands
 Suffolk Coastal
 Teesdale
 Teesdale/Wear Valley
 Tynedale
 Tynedale/Blyth Valley/Wansbeck/Alnwick/Castle Morpeth
 Vale of White Horse
 W Dorset
 W Oxfordshire
 West Somerset
 West Wiltshire
 Wychavon