Regional Spread of Inbound Tourism

VisitBritain Research, August 2018

VisitBritain

Contents

Introduction

- This report looks at the regional distribution of inbound visitors to the UK during 2017, along with nation spread over the longer term.
- This analysis comes from the International Passenger Survey (IPS) carried out by the Office for National Statistics (ONS) during 2017.
- This report updates the historical Foresight reports on this topic.
- Further information on visitor characteristics and behaviours from the Discover England Fund can be found here:

  https://www.visitbritain.org/visitor-characteristics-and-behaviour
- Interactive data visualisations and latest regional data can be found on the VisitBritain website:

  https://www.visitbritain.org/nation-region-county-data

  https://www.visitbritain.org/latest-quarterly-data-area
- All figures are based on IPS 2017, unless otherwise stated
- All spend is nominal

Summary

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

  - **Scotland** saw an increase in both visits and spend in 2017 – both reaching new record levels. The USA – Scotland's largest and most valuable market – had a 35% increase in visits between 2015 and 2017, spending 47% more than they did in 2012-2014.
  - After 4 consecutive years of growth, visits to **Wales** in 2017 were flat, but are still up 16% in the 3 years to 2017 (2015-17) compared to the 3 years before (2012-14). Inbound visitor spending to Wales fell 17% in 2017, compared to the spend record set in 2016, but remains up 15% over the longer term 3 years to 2017.
  - The **North East** saw a fall in visit numbers in 2017 (1%) while spend fell 42%, compared to the record set last year. Over the past 3 years, the North East has seen a 27% increase in visits and a 30% rise in inbound visitor spending. The top 5 generating markets to the North East have visit growth in the last 3 years (2015-2017), compared to the previous 3 year period.
  - **North West** saw visit numbers rise 11% to a record 3.1 million in 2017 – the first time there have been more than 3 million visits to the NW region. Spending too reached record levels of £1.6 billion. The North West's most valuable market – USA – reported a 29% rise in spend in the last 3 years, setting a new record in 2017 (£143 million).
  - The number of visits to **Yorkshire** fell 2% in 2017 but inbound visits between 2015-2017 are 9% higher than the previous 3 year period. Visitors spent £567 million in Yorkshire in 2017. The number 1 market for Yorkshire in the last 3 years in terms of volume and value was the USA. Visits from this market were up 27% in 2017, while sending rose 44% on 2016 results.

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Summary

- Inbound visits set new records to the **West Midlands** in 2017. There were 2.3 million visits, with these visitors spending a combined £807 million in the area. While the West Midlands welcomes visitors for a range of purposes, in 2017 they reported the highest proportion of business visits of all regions and nations in this report with 2 out of every 5 visits to the area for business.
- Compared to the record visits and spending set in 2016, results for 2017 show negative growth to the **East Midlands**. However, over the longer term 3 years to 2017, visit numbers have risen 24% vs 2012-14, while spending is up 9%. All of the top 5 markets to the East Midlands are in Europe - Poland, Irish Republic, Spain, Germany and France since 2015.
- **East of England** visit numbers in 2017 were on par with 2016, but just enough to claim a new visits record although spend fell 5%. Of all the areas examined in this report the East of England had the highest proportion of visits to friends and relatives in 2017 – 45%.
- Inbound visitor numbers to the **South West** grew 3% to a record 2.6 million in 2017 though spending was down 10%, compared to the record spent in 2016. Inbound visits to the South West are dominated by holiday and those visiting friends and relatives. Between 2015 and 2017 both inbound visits and spend to the South West have grown by 16%, compared to the previous 3 years.
- 2017 was the third consecutive year the **South East** hosted more than 5 million international visits, which rose 2% in 2017, although spend fell slightly by 3%.
- **London** saw a 4% increase in visit numbers in 2017, while spend rose 14%. Both set new records. Over half of the visits to London in 2017 were for holiday.

- As part of the IPS in 2016, VisitBritain asked departing passengers about their day trips – which can be explored to give a fully picture of international tourism at the regional level. A link to this additional report is included on slide 34.

Analysis by UK area –
North, South, East and West

Key metrics by UK area 2017

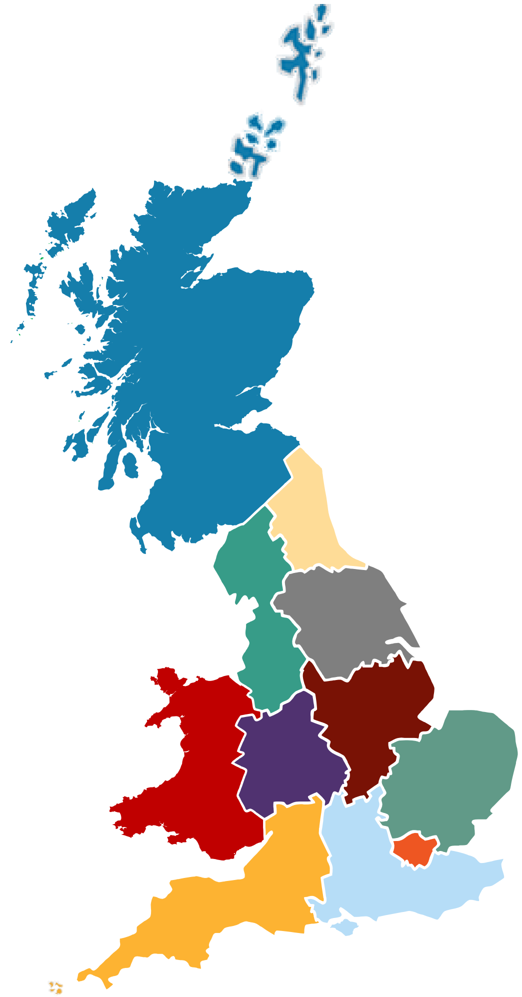
Scotland
3.2m
£2.3bn

North West
3.1m
£1.6bn

West Midlands
2.3m
£807m

Wales
1.1m
£369m

South West
2.6m
£1.2bn



North East
556,000
£241m

Yorkshire
1.3m
£567m

East Midlands
1.3m
£444m

East of England
2.4m
£815m

London
19.8m
£13.5bn

South East
5.3m
£2.1bn

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

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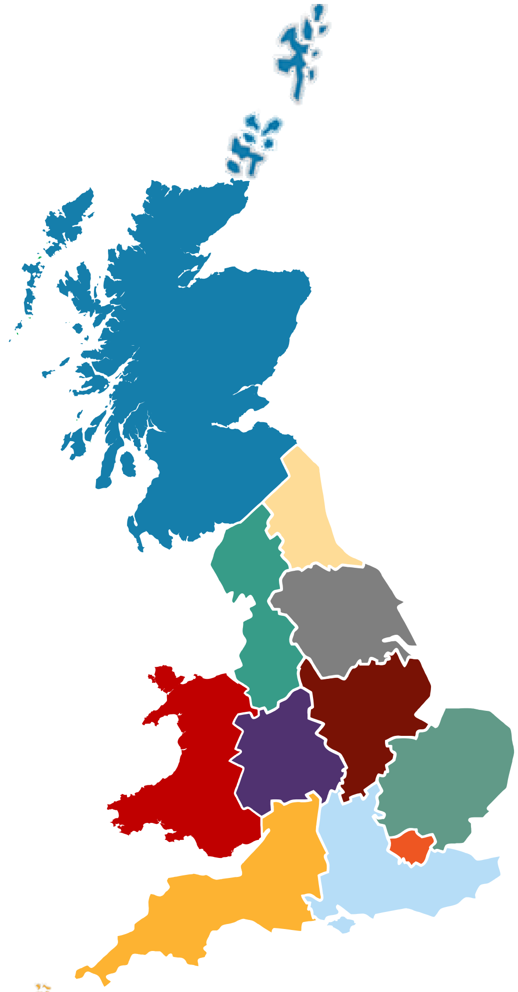
Average key metrics by UK area 2017



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

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

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

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

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

North East
Spend per visit: £434
Nights per visit: 9
Spend per night: £48

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

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

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

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

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

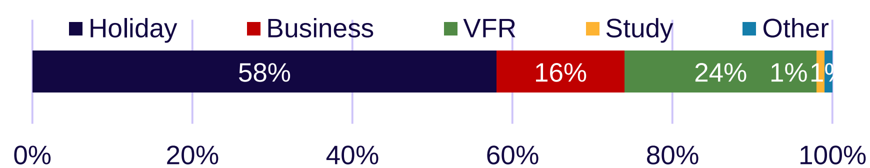
Base (2017): Scotland 2,680; Wales 1,092; London 18,638; North East 554; North West 3,114; Yorkshire 1,452; West Midlands 1,916; East Midlands 1,042; East of England 2,123; South West 2,898; South East 4,791

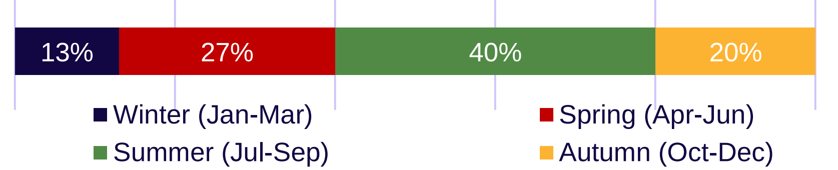
Scotland

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

	Visits	Growth
2017	3.2m	17%

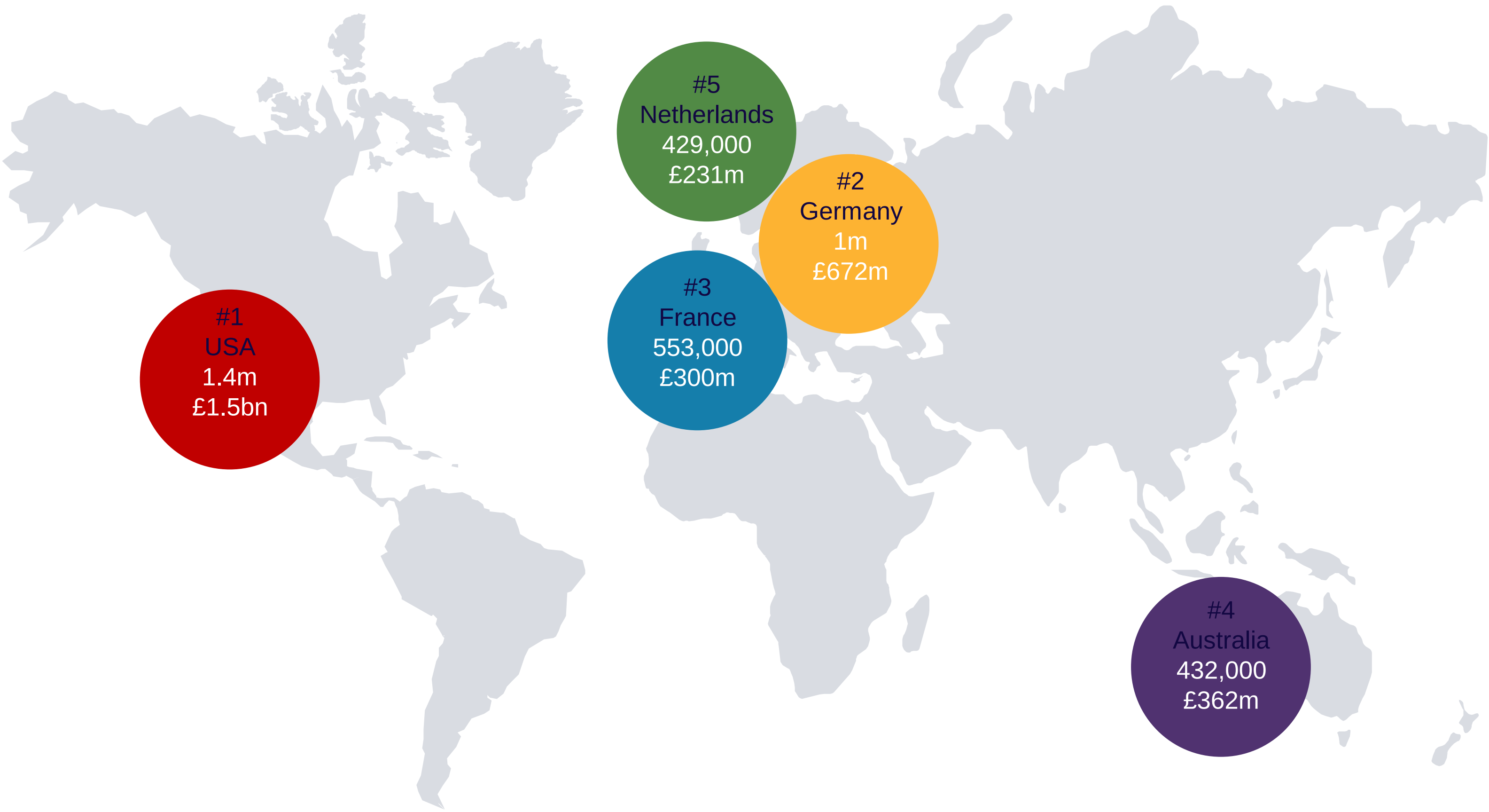
	Spend	Growth
2017	£2.3bn	23%





Base (2017): 2,680

Scotland – Top 5 markets (2015 - 2017)



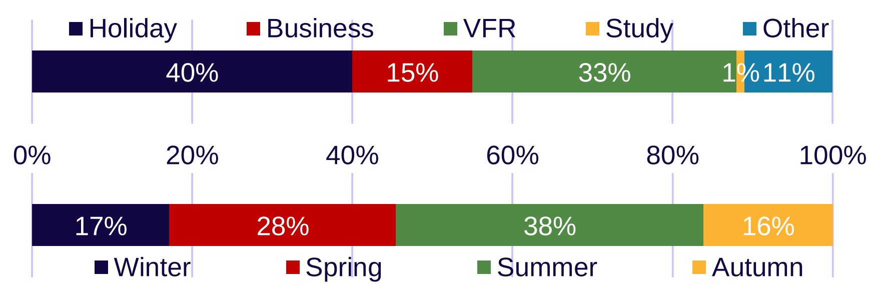
Base (2015-2017): USA 1,341, Germany 1,148, France 398, Australia 624, Netherlands 609

Wales

	Visits	Growth
2017	1.1m	0%

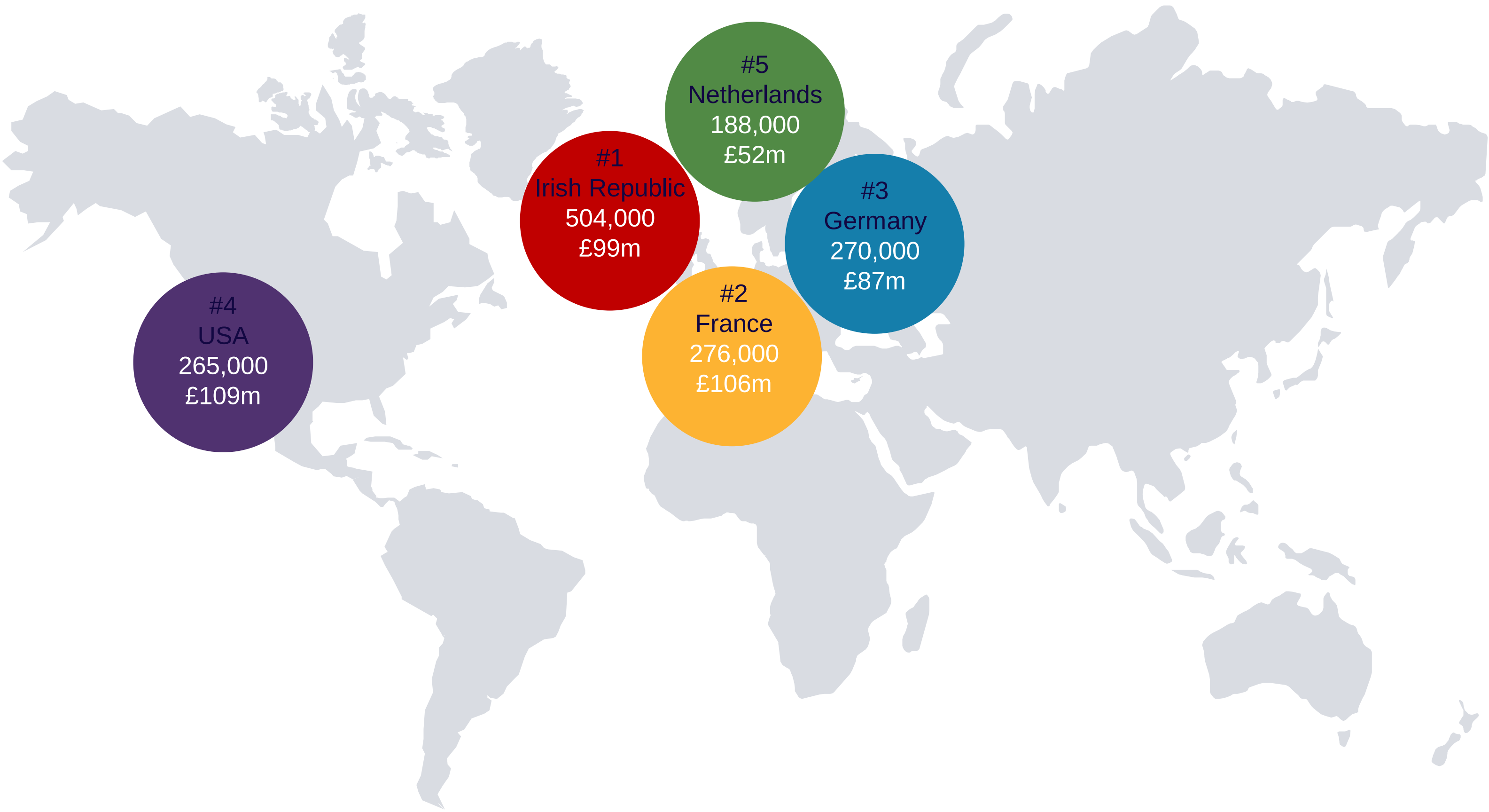
	Spend	Growth
2017	£369m	17%

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



Base (2017): 1,092

Wales – Top 5 markets (2015 - 2017)



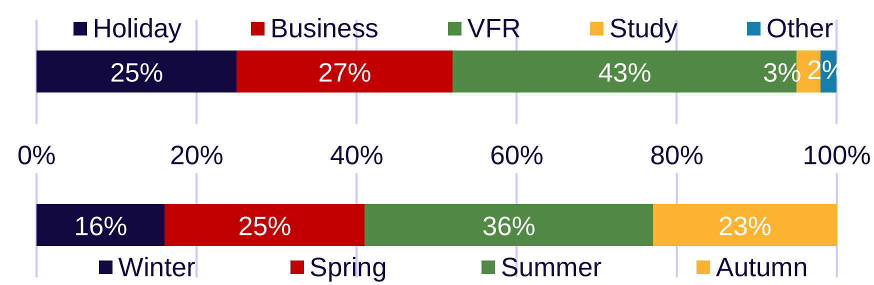
Base (2015-2017): Irish Republic 442; France 284; Germany 294; USA 359; Netherlands 217

North East

	Visits	Growth
2017	556,000	-1%

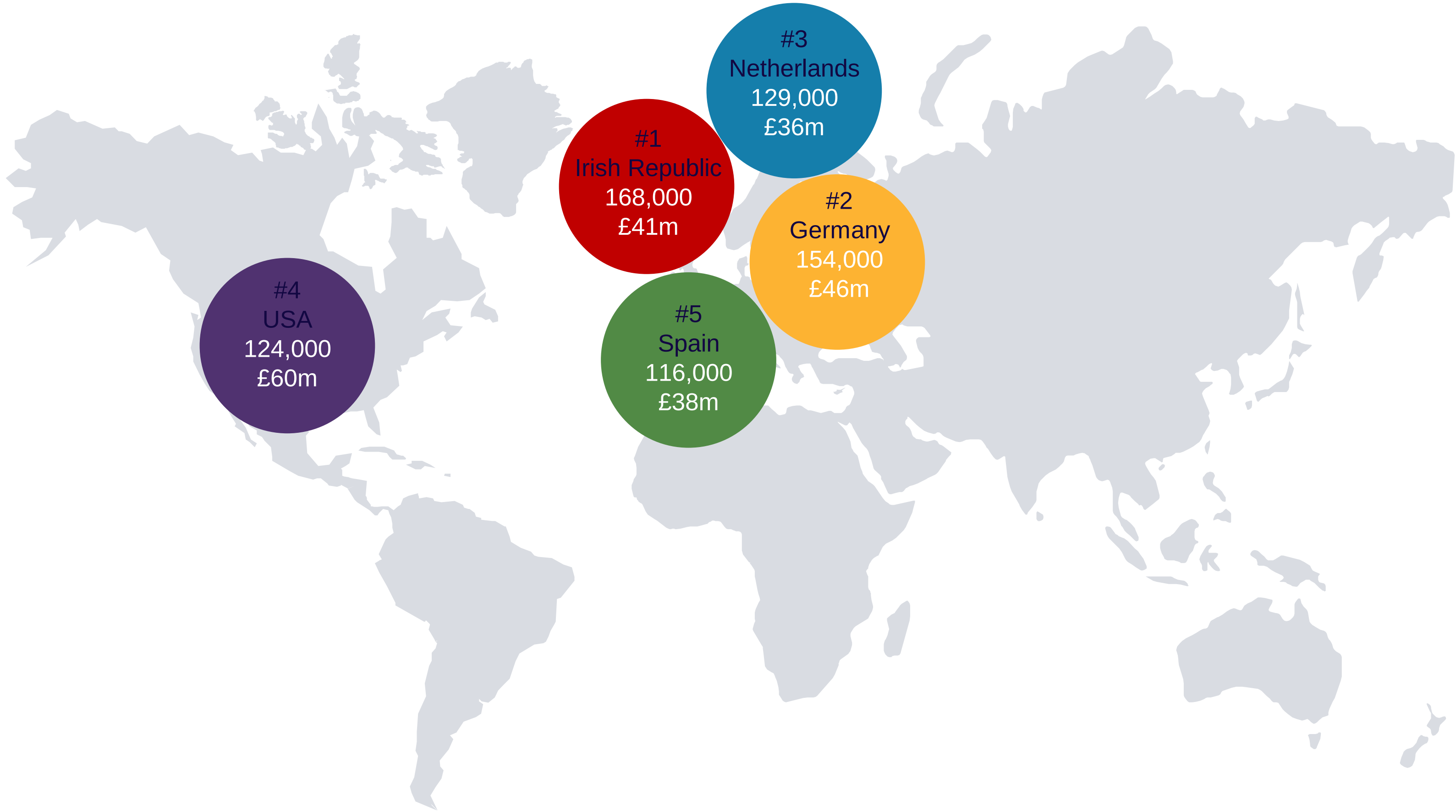
	Spend	Growth
2017	£241m	-42%

- 2017 saw inbound visits to the North East fall 1% compared to 2016.
- After record spending in 2016, spend fell 42% in 2017 to sit in line with pre 2016 results.
- VFR was the most popular reason to be in the North East in 2017, followed by business.
- The summer quarter was most popular for visits during 2017.



Base (2017): 554

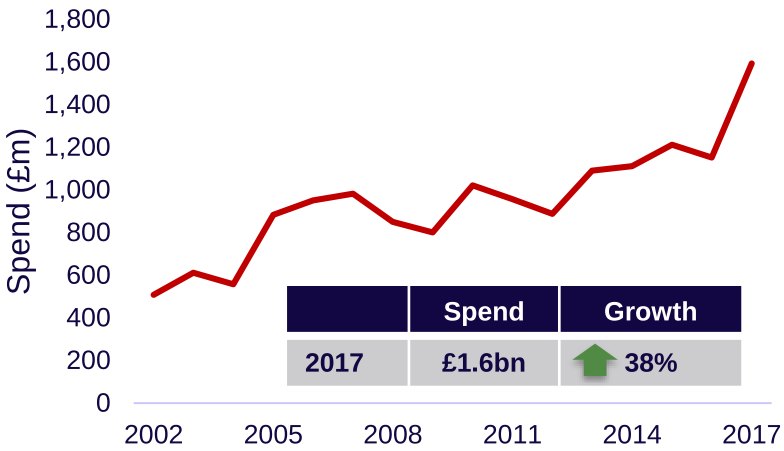
North East – Top 5 markets (2015 - 2017)



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

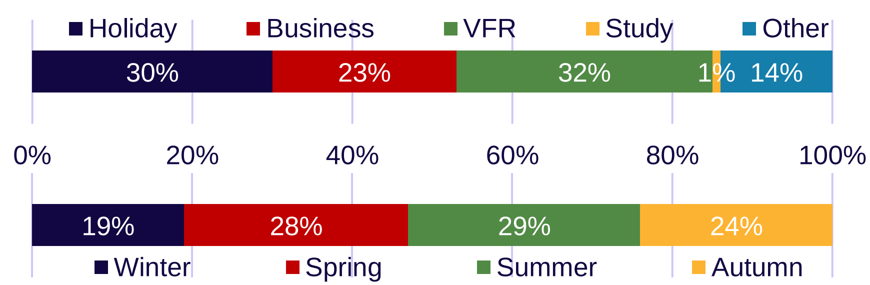
North West

	Visits	Growth
2017	**3.1m**	**11%**



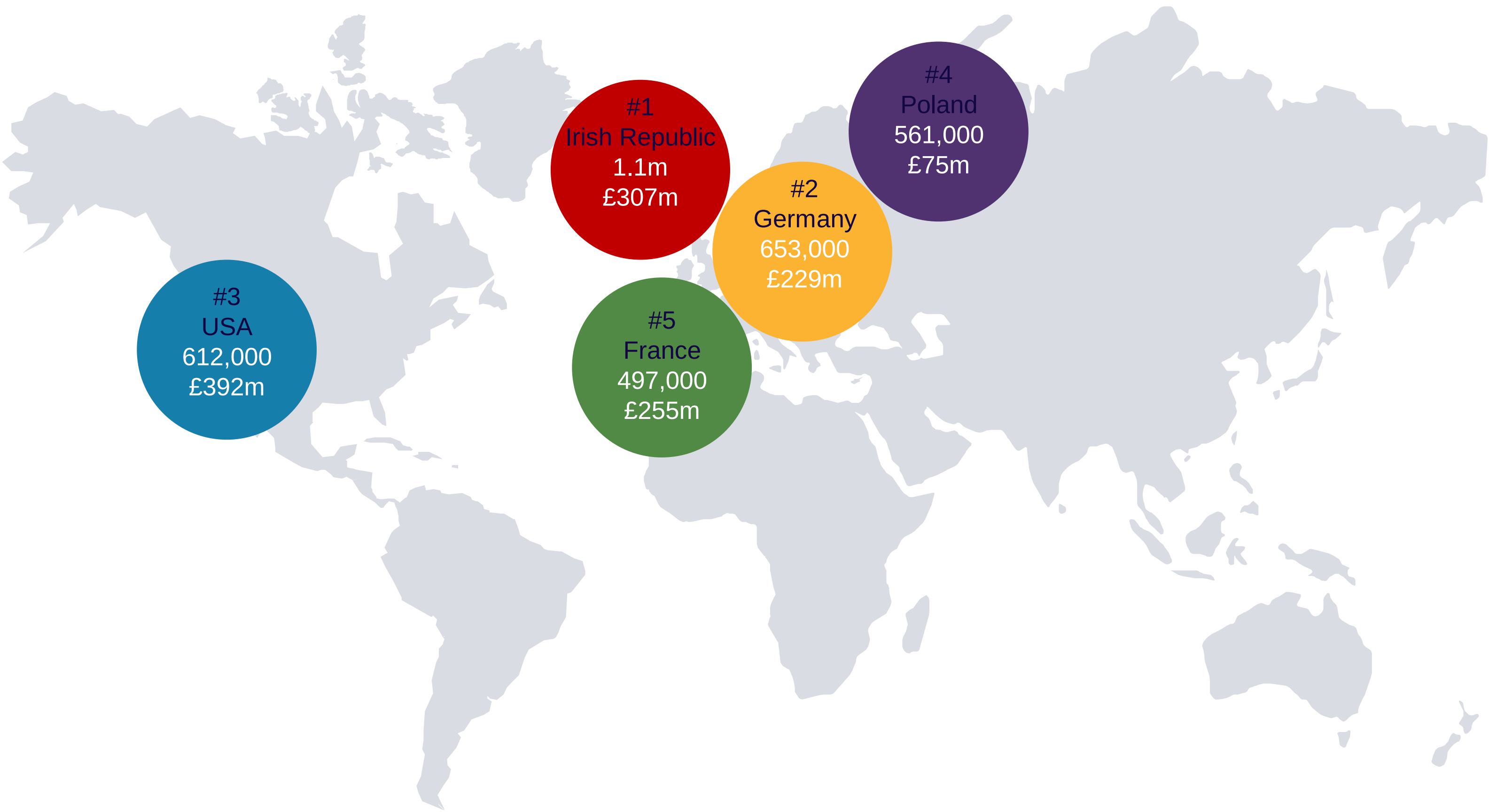
	Spend	Growth
2017	**£1.6bn**	**38%**

- 2017 North West visit numbers reach a record 3.1 million - the 5th consecutive year of visits growth.
- Spend rose 38% in 2017 to a record £1.6 billion – the 5th year in a row visitor spending has topped £1 billion.
- VFR was the most popular reason to visit the North West last year followed by holiday.
- The summer quarter was most popular for visits in 2017.



Base (2017): 3,114

North West – Top 5 markets (2015 - 2017)

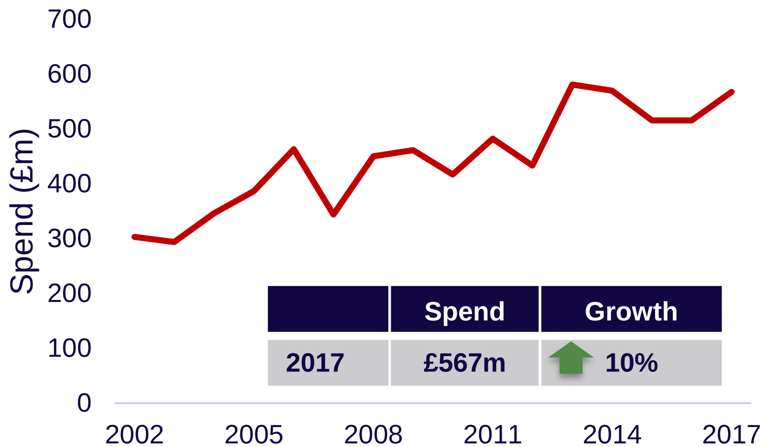


Base (2015-2017):Irish Republic 1,076; Germany 851; USA 886; Poland 421; France 454

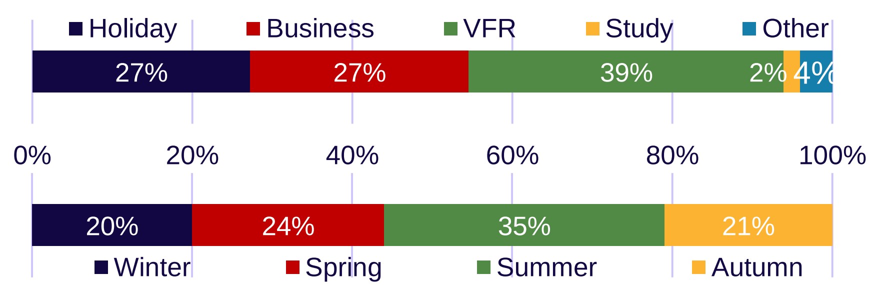
Yorkshire

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

	Visits	Growth
2017	1.3m	-2%

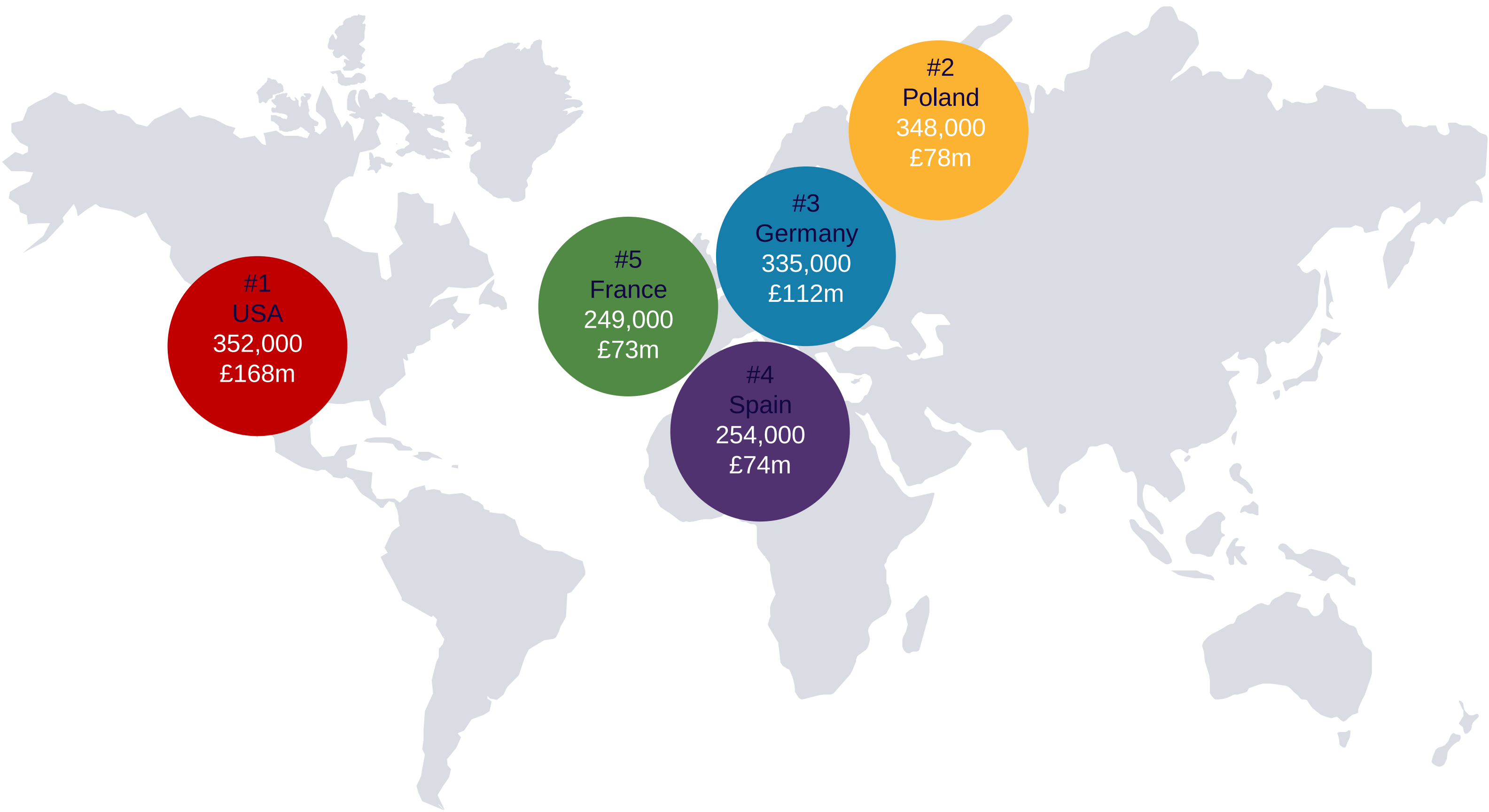


	Spend	Growth
2017	£567m	10%



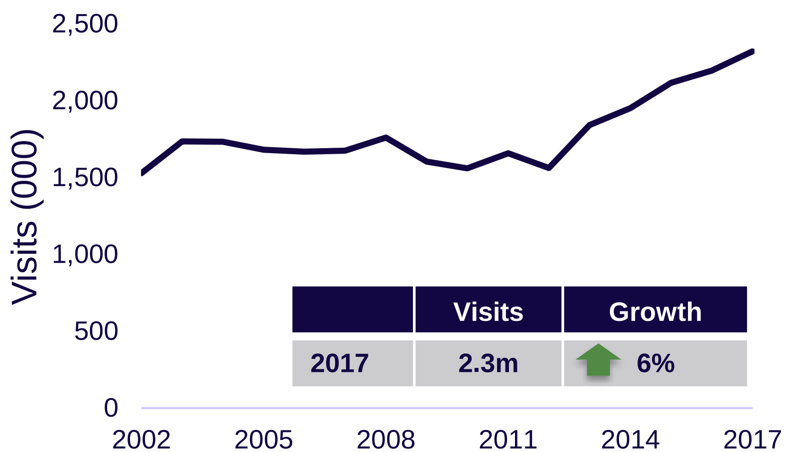
Base (2017): 1,452

Yorkshire – Top 5 markets (2015 - 2017)



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

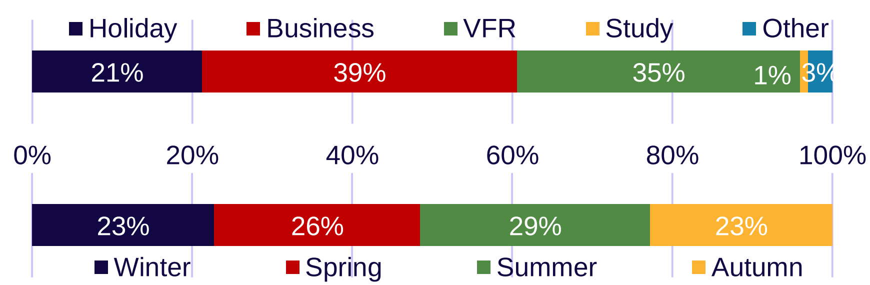
West Midlands



	Visits	Growth
2017	2.3m	6%

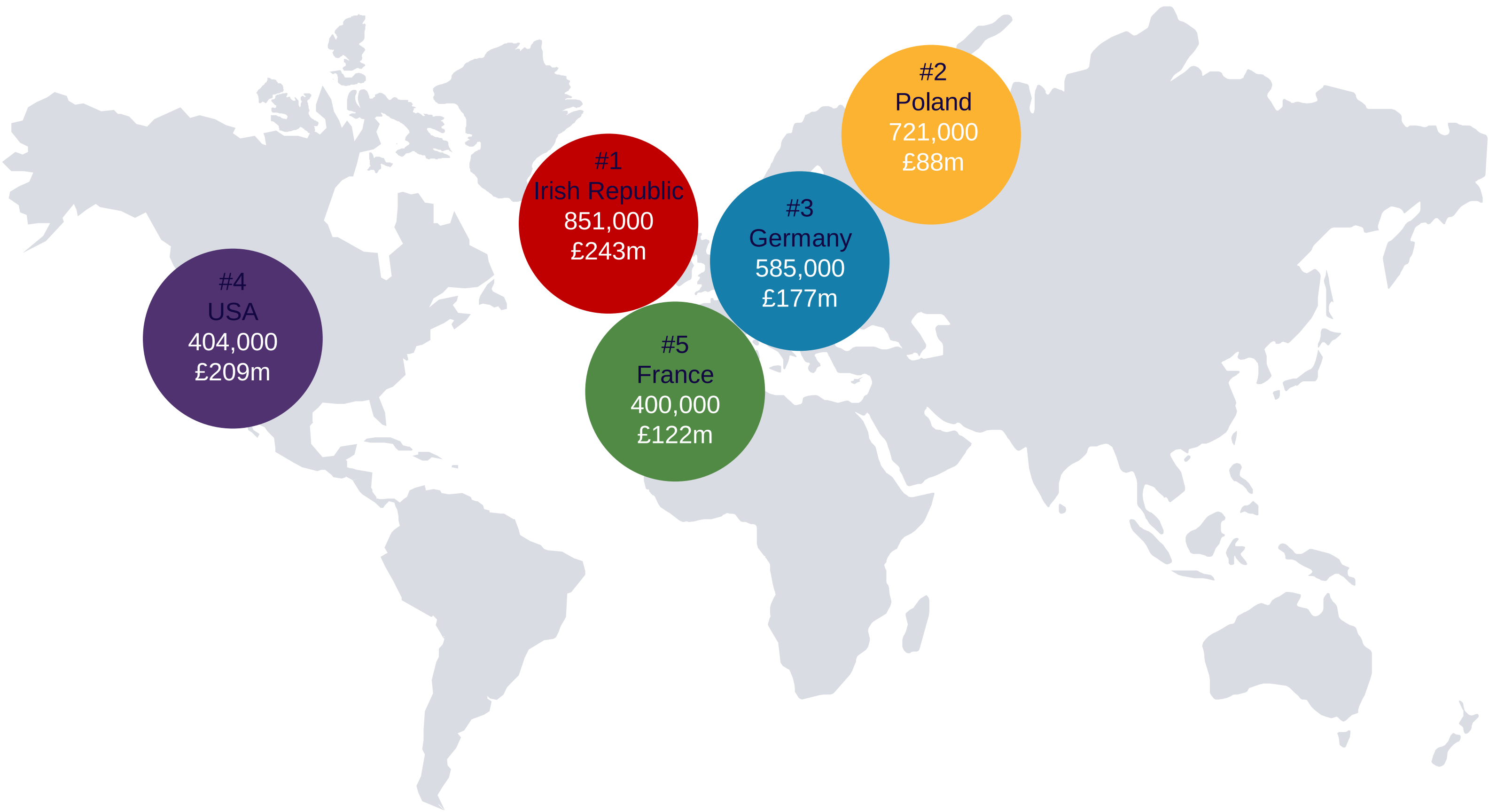
	Spend	Growth
2017	£807m	-6%

- The West Midlands welcomed a record 2.3 million visits in 2017 – the 5th consecutive year of record breaking visits.
- Visitors spent £807 million in 2017, 6% less than the record spent in 2016.
- The most popular reason to visit in 2017 was business.
- In 2017, visits to the West Midlands were quite evenly spread across the seasons.



Base (2017): 1,916

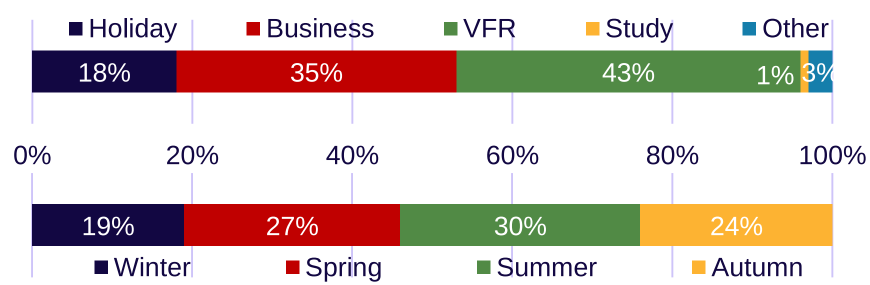
West Midlands – Top 5 markets (2015 - 2017)



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

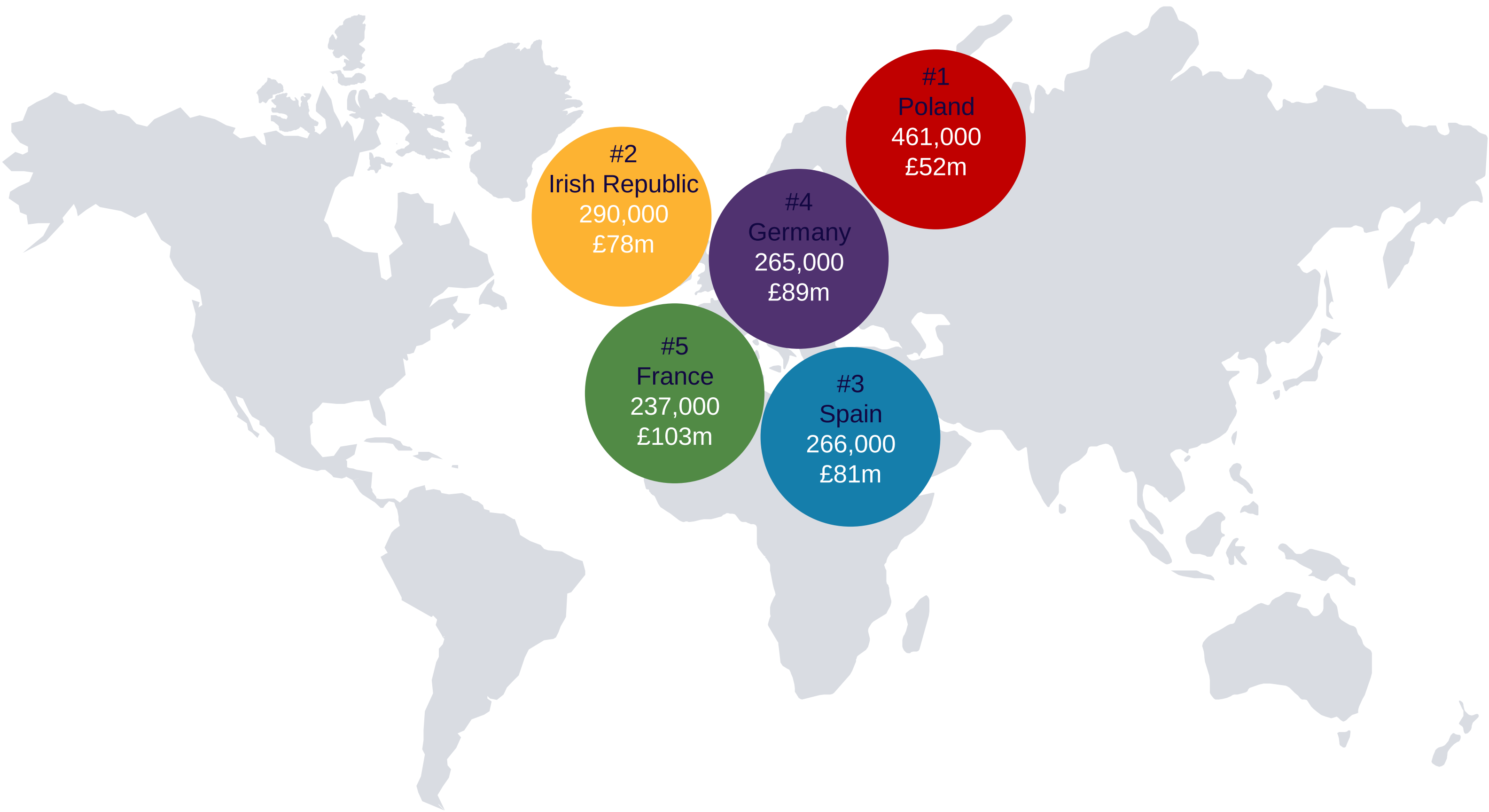
East Midlands

- International visits to the East Midlands fell 4% compared to the record set in 2016.
- 2016 was also a record year for inbound spend to the East Midlands; in 2017 spend fell 8%.
- 4 out of every 5 visits to the area in 2016 were to visit friends and relatives or for business.
- July – September were the most popular visit months in 2017.



Base (2017): 1,042

East Midlands – Top 5 markets (2015 - 2017)

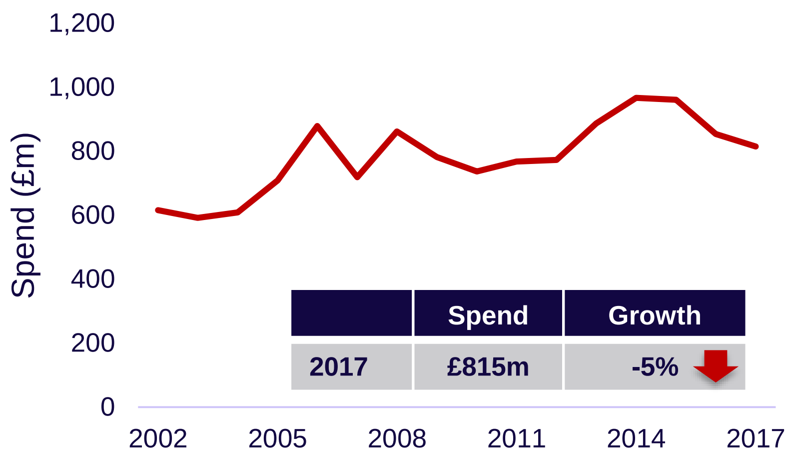


Base (2015-2017): Poland 277; Irish Republic 189; Spain 154; Germany 263; France 198

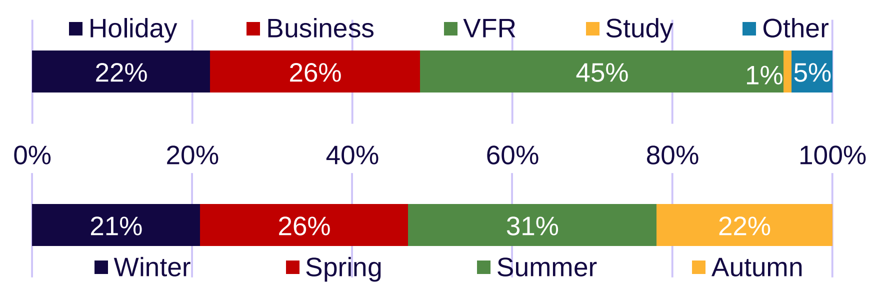
East of England

- Visits in 2017 matched the record set in 2016 – the 2nd consecutive year of record breaking visit levels.
- Inbound visitor spend to the East of England fell 5% in 2017 (compared to 2016).
- Visiting friends and relatives account for almost half of all visits in 2017.
- Summer and spring were the most popular seasons in 2017.

	Visits	Growth
2017	2.4m	0%

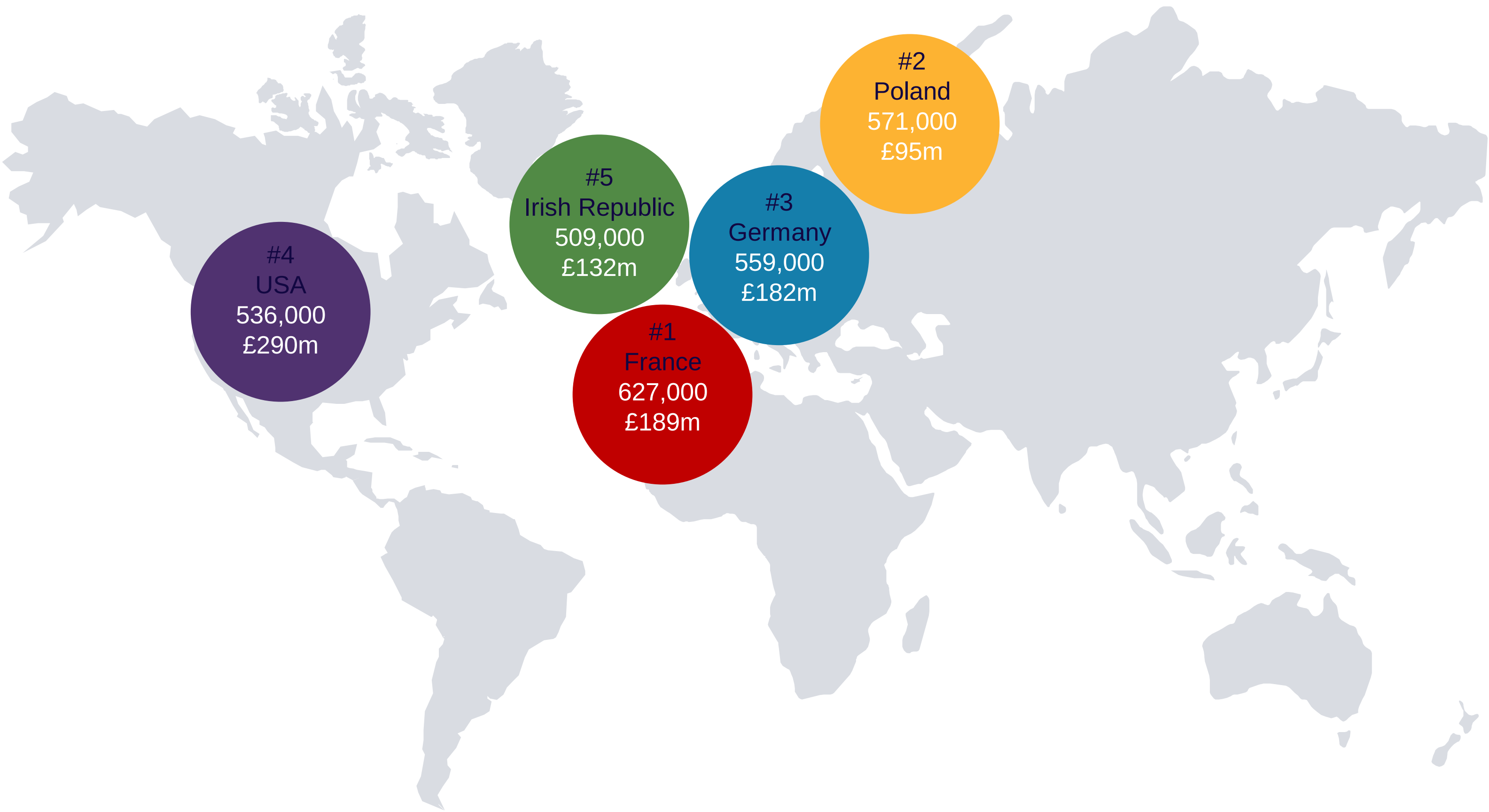


	Spend	Growth
2017	£815m	-5%



Base (2017): 2,123

East of England – Top 5 markets (2015 - 2017)

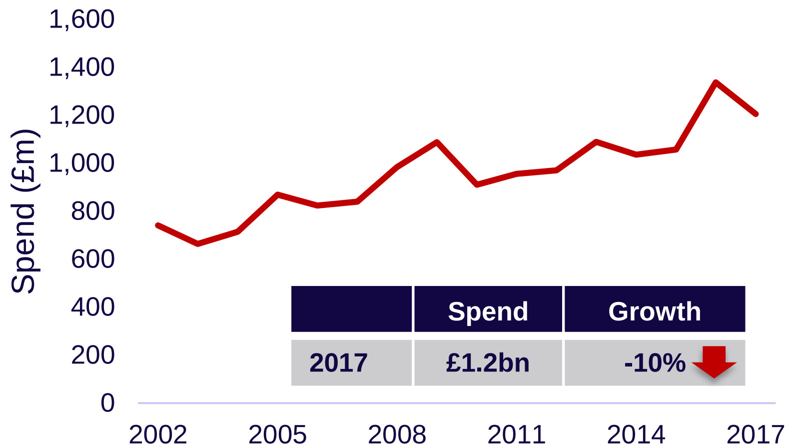


Base (2015-2017): France 500; Poland 357; Germany 528; USA 792; Irish Republic 436

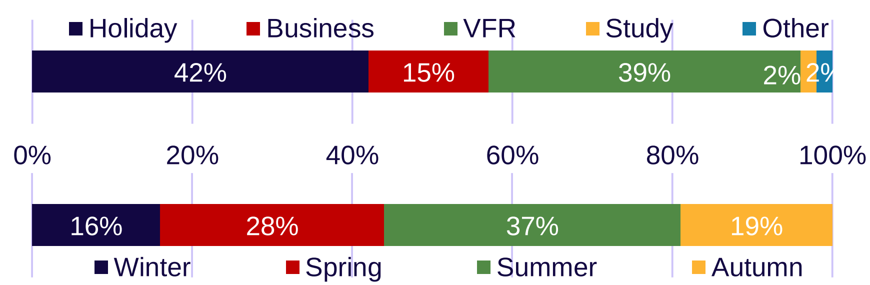
South West

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

	Visits	Growth
2017	2.6m	3%

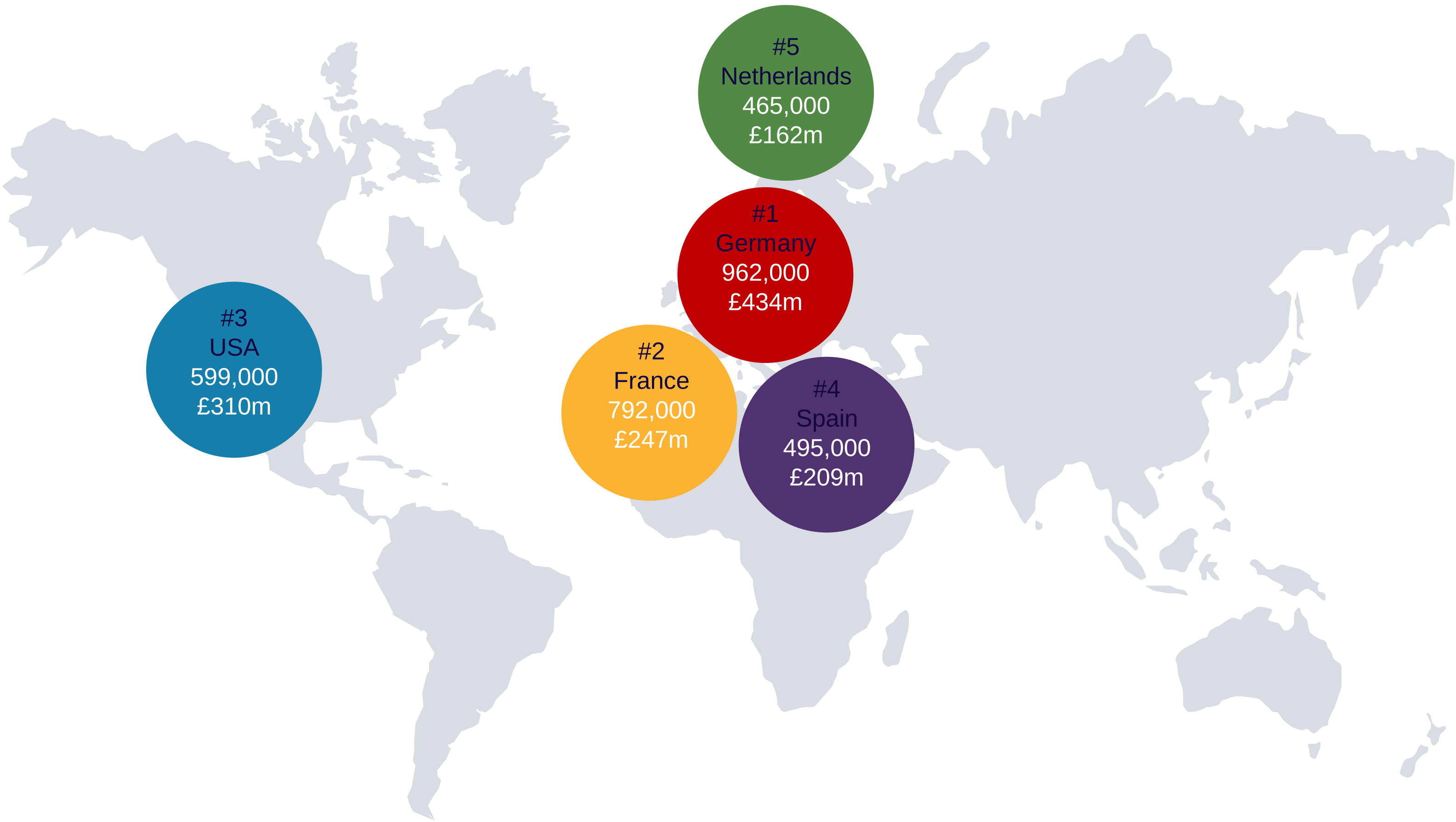


	Spend	Growth
2017	£1.2bn	-10%



Base (2017): 2,898

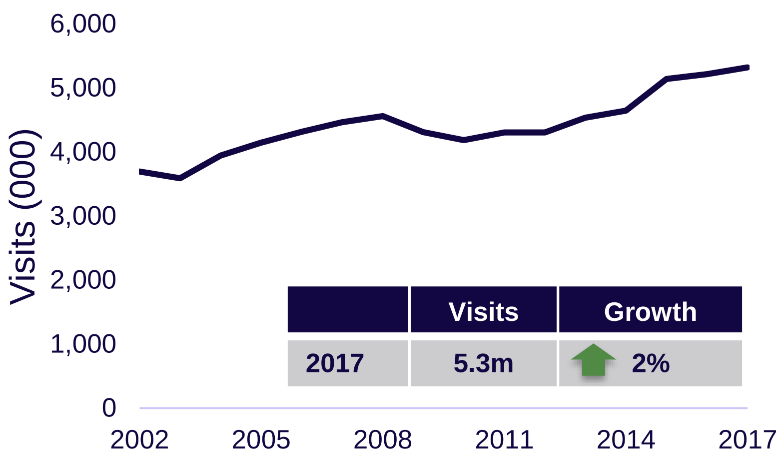
South West – Top 5 markets (2015 - 2017)



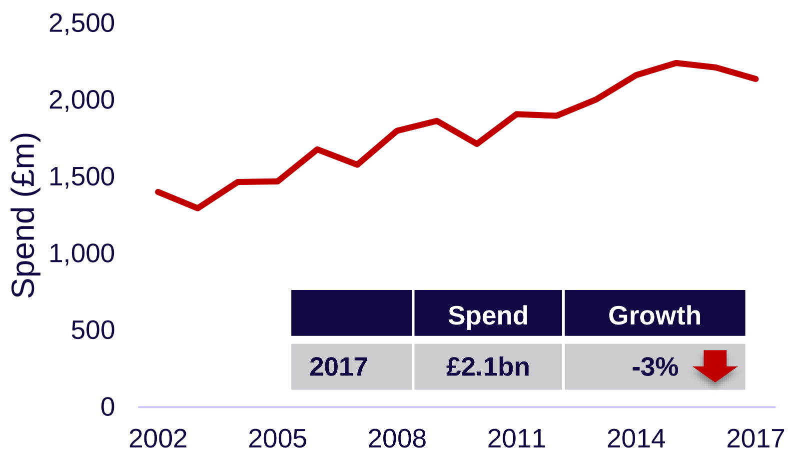
Base (2015-2017): Germany 979; France 787; USA 933; Spain 502; Netherlands 512

South East

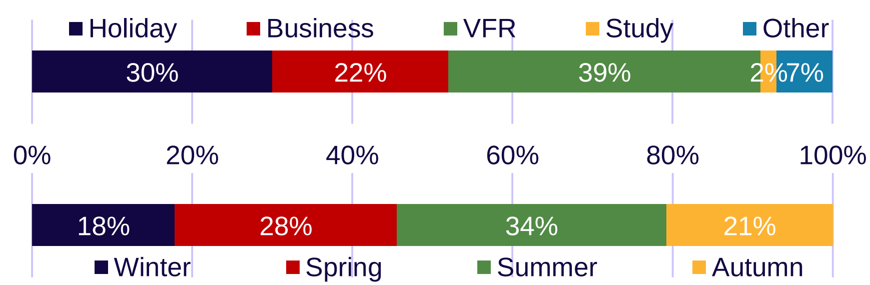
- 2017 was the third consecutive year more than 5 million international visits were made to the South East – a new record.
- In each of the last 5 years, visitor spend has been above £2 billion, but was down 3% in 2017.
- While a fifth of visits were for business, VFR was the most popular reason to visit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



	Visits	Growth
2017	5.3m	2%

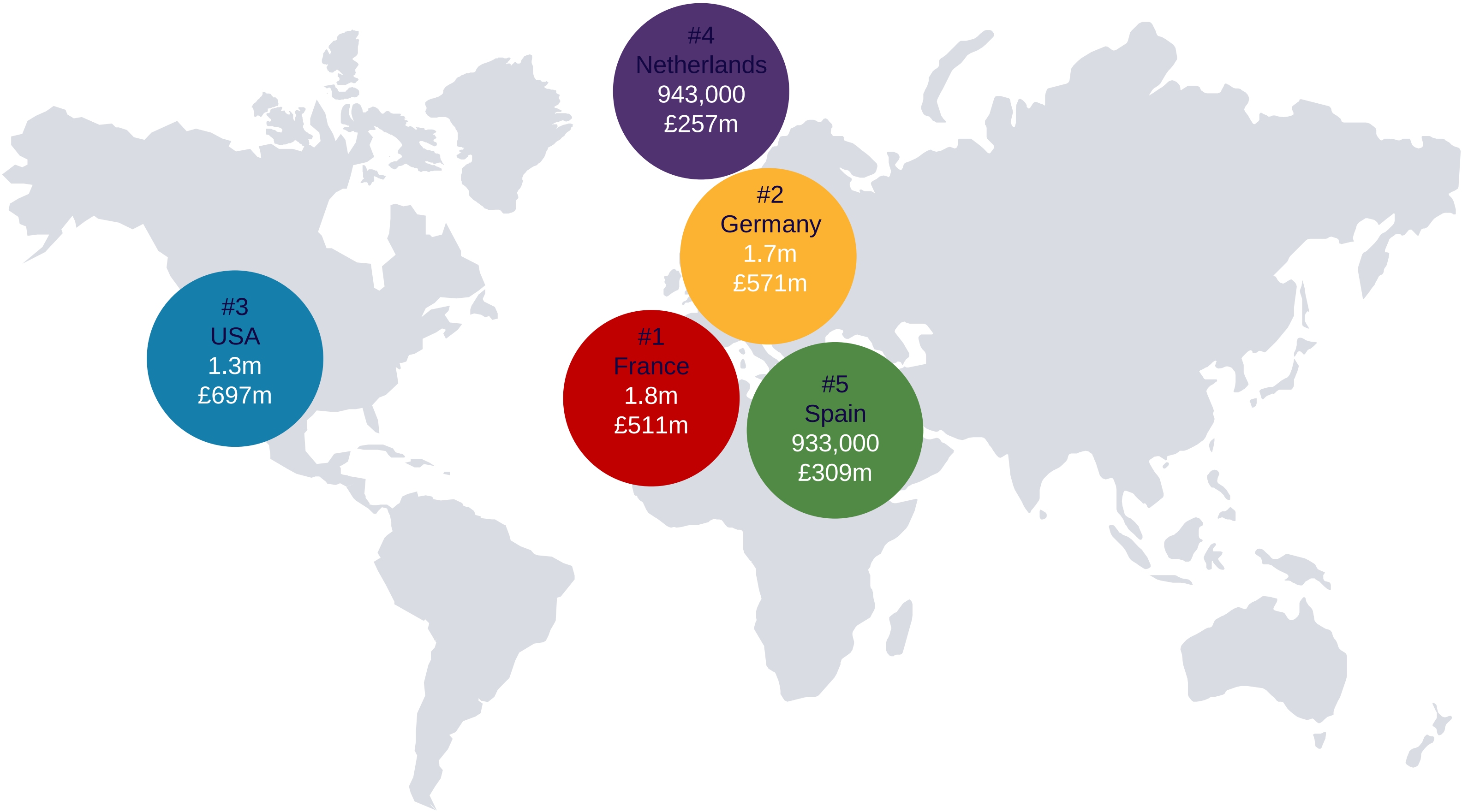


	Spend	Growth
2017	£2.1bn	-3%



Base (2017): 4,791

South East – Top 5 markets (2015 - 2017)



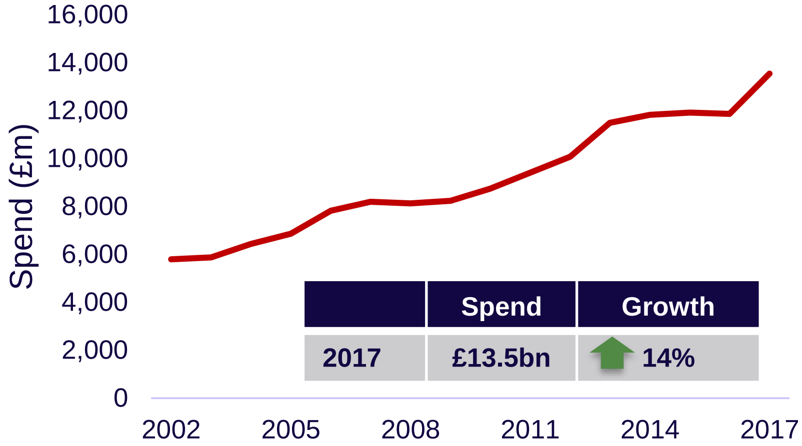
Base (2015-2017): France 1,543; Germany 1,524; USA 1,845; Netherlands 932; Spain 697

Spotlight on – London

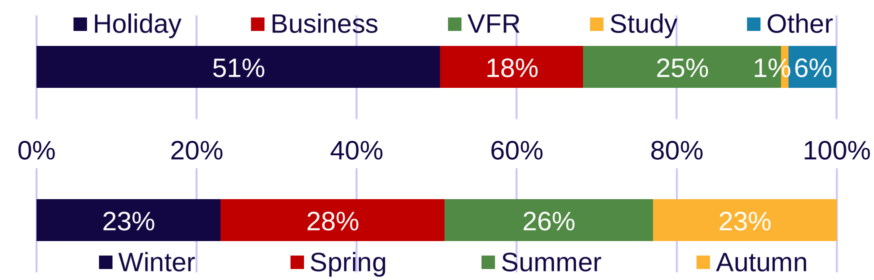
London

- London welcomed almost 20 million visits in 2017 – up 4% on 2016 and the 8th straight year of growth.
- Spend too reached record levels in 2017 - £13.5 billion.
- Holiday was the most popular reason to visit London in 2017 – accounting for half of all visits.
- London welcomed visitors in similar proportions throughout the year.

	Visits	Growth
2017	19.8m	4%

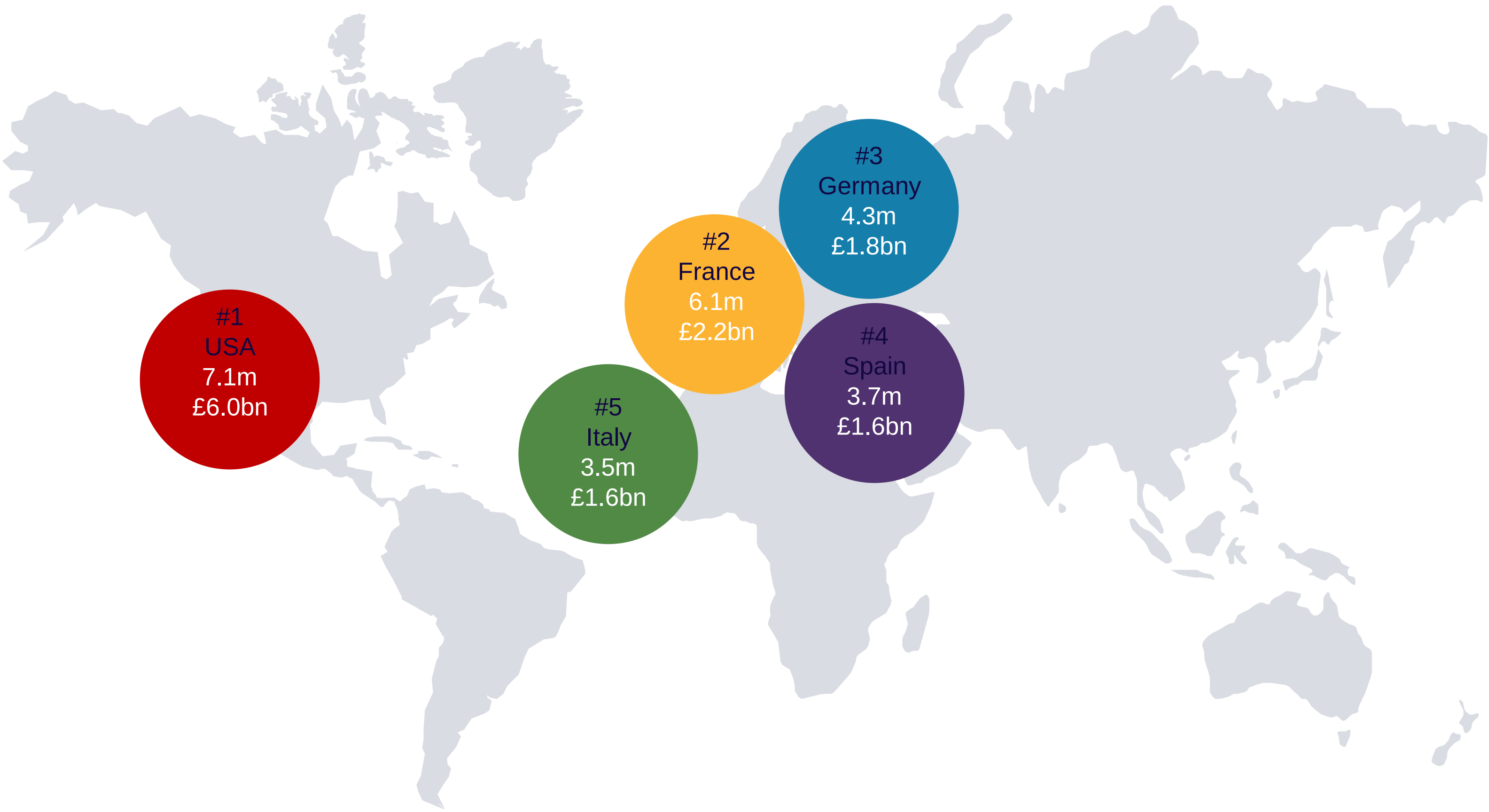


	Spend	Growth
2017	£13.5bn	14%



Base (2017): 18,638

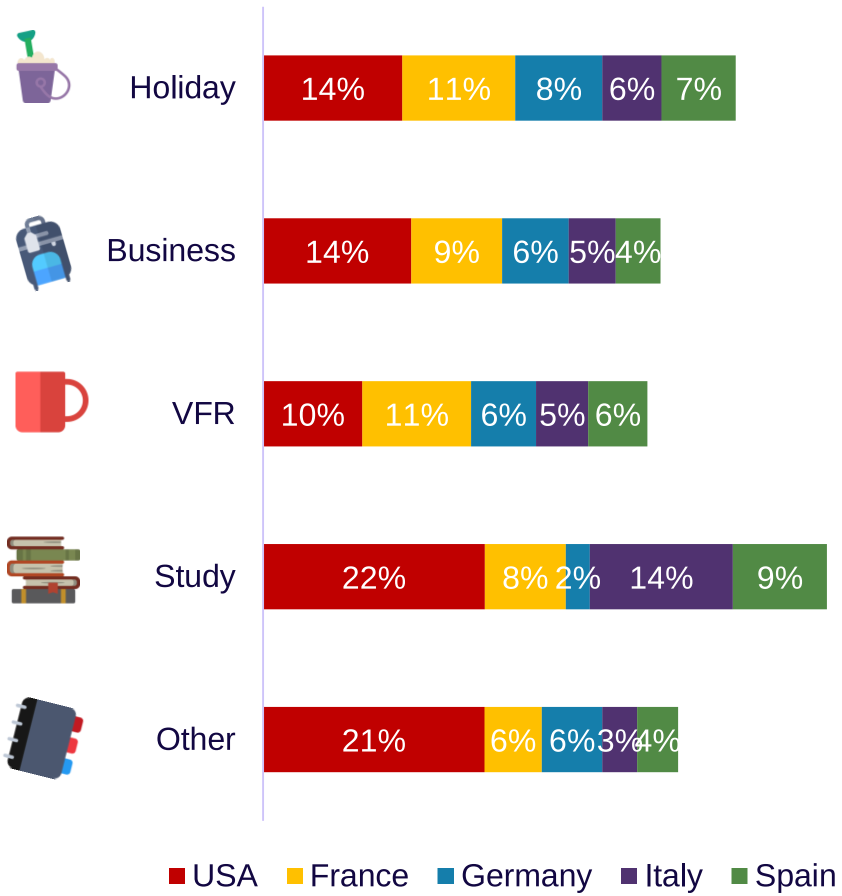
London – Top 5 markets (2015 - 2017)



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

London - Top 5 markets (2017)

By journey purpose



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

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

Day Visits and Day Trippers

Day Visits and Day Trippers

- While understanding where international visitors stay overnight, to complete the picture, we also need to be able to see about day trips – that is where inbound visitors visits, but do not stay overnight.
- During 2016, VisitBritain sponsored 2 questions in the IPS to understand this area in more detail.
  - How many day visits did you take from…(CITY / TOWN)?
  - Which towns were your five most recent day visits made to?
- Due the scale of the data, a separate report has been prepared to explore the day trip data at the regional level and to outline the characteristics of day trippers.
- The report is available on our website here:

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

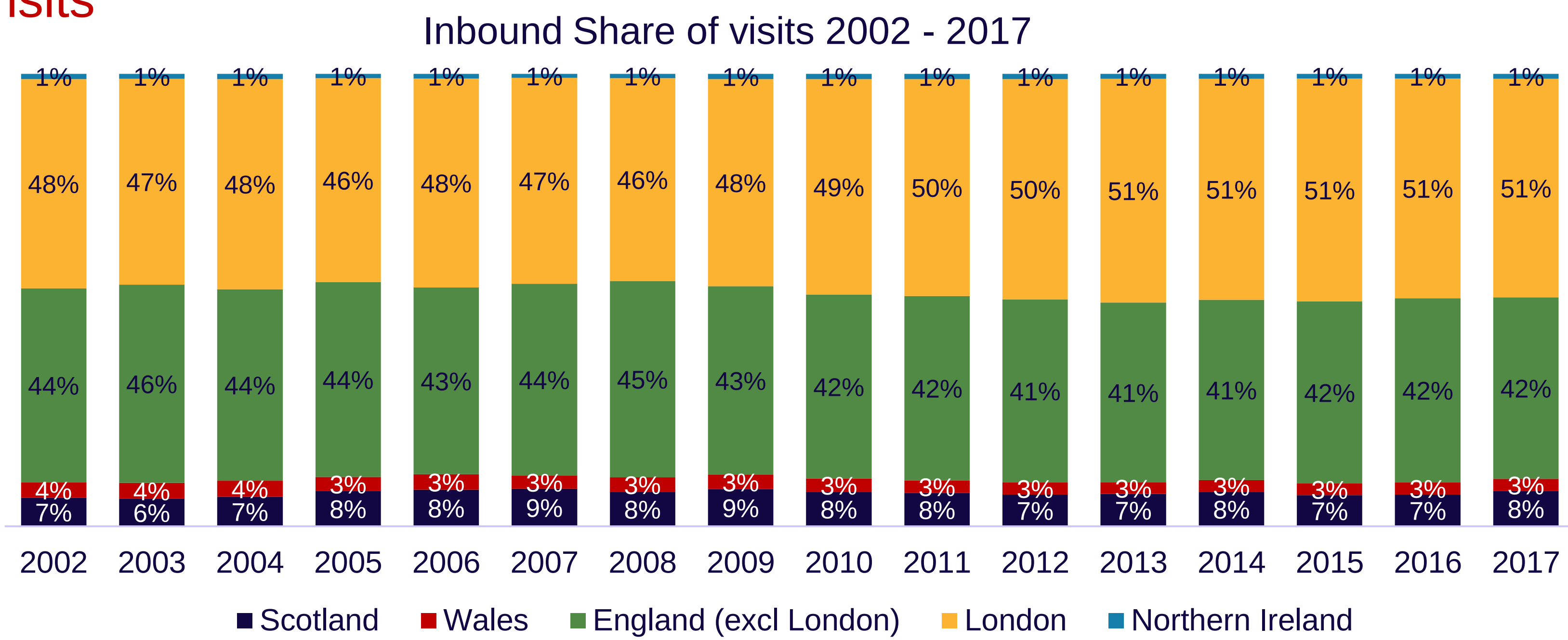
- This report focuses on day visits to and from the UK's cities and towns.

Nations Share –

Long Term and Journey Purpose

Nation Share 2002-2017

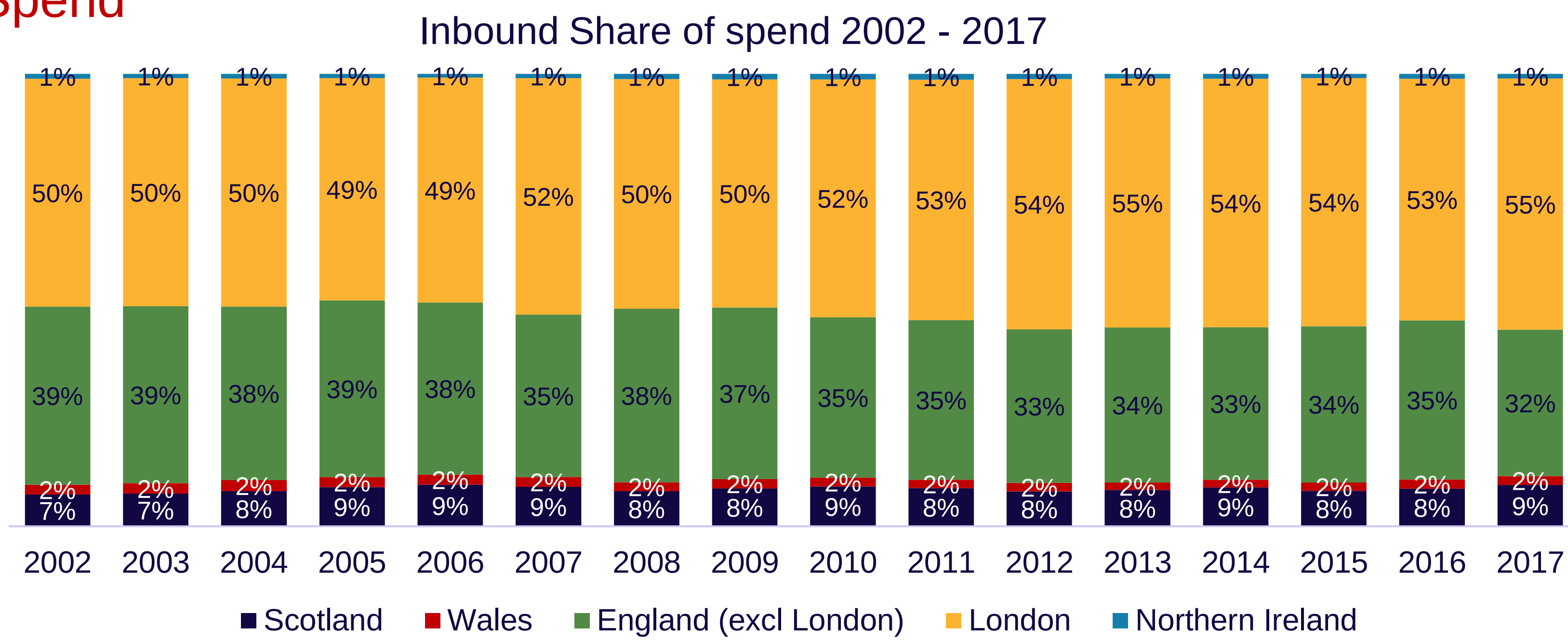
Visits



- London has consistently attracted the largest share of visits - though pre 2008 the difference was not a marked as it has been in more recent years.
- Since 2010, England (excl London) has held market share of around 42%, while Scotland has held 7%, rising to 8% in 2017.
- Wales holds a 3% share of visits, while Northland Ireland holds 1%.

Nation Share 2002-2017

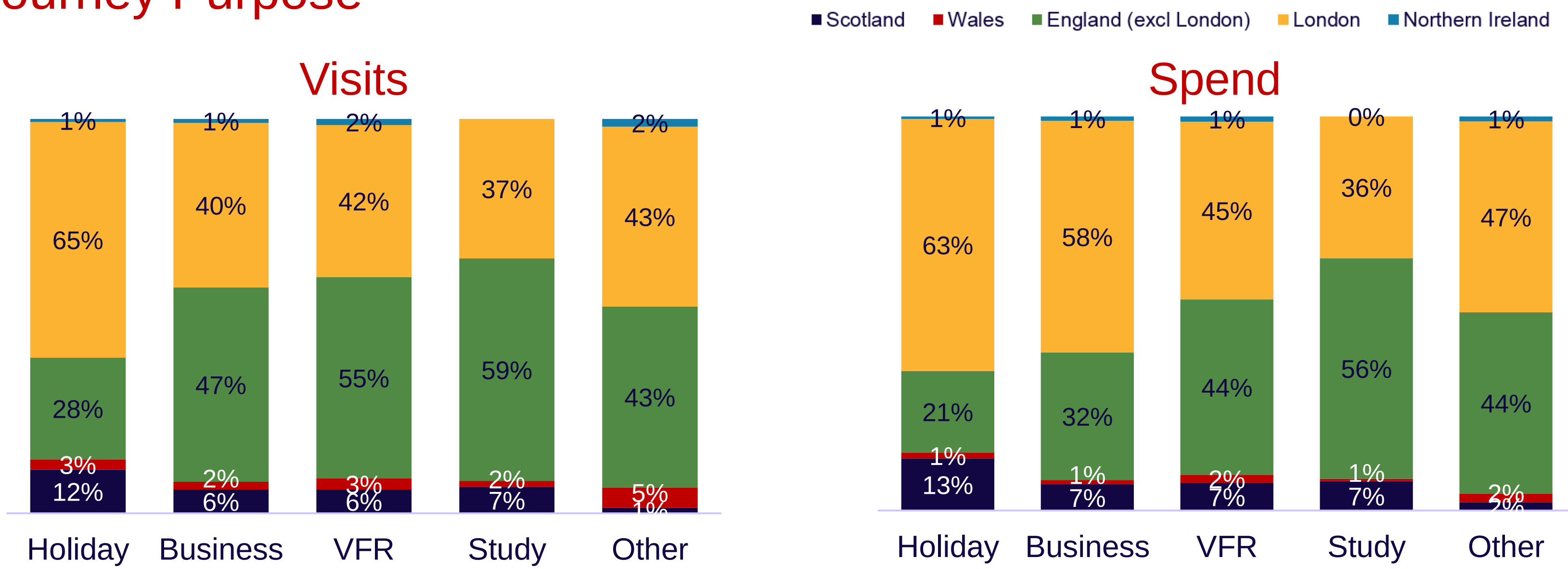
Spend



- London's share of spend has been much more marked – with London's share not below 50% since 2006.
- England (excl London) market share has shown the most variation in ranging from 39% more than 10 years ago to 32% in 2017.
- Scotland has constantly held a 8-9% share of spend while Wales has 2%.

Nation Share 2017

Journey Purpose



- London held the largest share of UK holiday and *Other* visits in 2017, while England (excl London) leads the way with the highest share of business, VFR and study visits. The results for spending share are similar although London holds top spot for share of business spending.
- Scotland over indexes on holiday spend – with a 12% share of holiday visits, and 13% share of holiday spend.

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Average spend and length of stay 2017

Journey purpose

- The average UK visit spend was £625 in 2017, but this varied from £486 from a VFR visit to £692 from those in the UK on holiday.
- It is clear study visitors have a very different profile to the other main purpose categories – driven by a long length of stay.
- Looking at average length of stay, VFR visitors stayed over a week, on average, in 2017, while a business visitor stayed only 4.0 nights.
- The UK average spend per night in 2017 was £86, but it is business visitors who spent the most per night (£152) vs. a VFR visitor typically spending only £50.

Holiday	Business	VFR	Study	Other	UK Total
AVERAGE SPEND PER VISIT					
£692	£602	£486	£2,690	£545	£625
AVERAGE SPEND PER NIGHT					
£113	£152	£50	£53	£89	£86
AVERAGE LENGTH OF STAY					
6.1 nights	4.0 nights	9.7 nights	50.3 nights	6.1 nights	7.3 nights

Further resources

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

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

Latest regional statistics
https://www.visitbritain.org/latest-quarterly-data-area

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

UK town visits since 2010
https://www.visitbritain.org/town-data

Appendix

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

- The data source for all charts and tables is 2017 **International Passenger Survey** (IPS), by the **Office for National Statistics** (ONS).
  - The IPS is designed to be representative and statistically robust at national level. Therefore caution should be exercised when interpreting results , especially at regional, area and town level.
  - Because some visitors stay in multiple destinations during their trip the sum of visits to each area will add to more than the total sum of visits to the UK.
  - All spend is nominal and excludes the price of getting to the UK

- The icons are all designed by Freepik and distributed by Flaticon

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Regional Spread of Inbound Tourism

August 2018