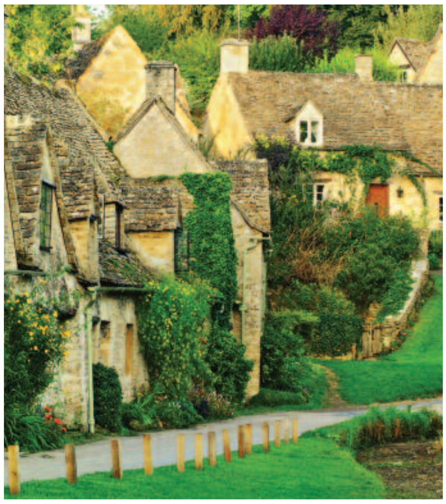
# A guide to working with the International Travel Trade
## for South West Tourism Businesses





SOUTH WEST ENGLAND IS GREAT BRITAIN

# Introduction

VisitWiltshire and South West England Travel Trade Group are working with VisitEngland on a programme of international travel trade activity to promote South West England. This activity is supported by VisitBritain, and brings together partner destinations from across the region. The £5m South West Tourism Growth Fund is a central government funded programme of activity, supported by match funding by partners in the public and private sectors.

The core purpose of this publication is to provide tourism businesses in South West England with information and intelligence that will enable deeper business development into the international sector.

The core purpose of this document is to increase business for products and local industry and to ensure that long-term partnerships between them and the international travel trade can be brokered.

The information in this document should enable South West England to improve understanding of its offer to the travel trade and enable the region to be consistent in its brand creative and messaging.

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# 1. The Inbound Visitor

## 1.1 Understanding Global Tourism

Several key factors are responsible for shaping global demand, and the tourism flows into Europe. Global tourism arrivals in 2015 are expected to reach 1.18 billion, an increase of 4.3% on the previous year. The long term historical trend has been one of sustained growth; since 2010, there has been an increase in international arrivals globally of 230 million, equivalent to a 24% rise.

The world continues to get better connected, making more parts of the world more accessible to more travellers. The low cost airline model has been the key facilitator in this trend. Originating in the USA and then the UK, the model is now established throughout all five continents.

Lower oil prices are generally positive for tourism demand. On the supply side, they reduce the cost of travel and tourism services. On the demand side, cheaper fuel increases the amount of disposable income available to travellers. At present, the low global oil price is having a very positive impact on travel demand from the UK's most valuable source market, the USA, where a halving in fuel prices is putting more money in consumers' pockets, driving up consumer confidence, and boosting discretionary spend in areas like tourism. The downside to lower oil prices their adverse impact on economic output in the major oil producing economies, which can transmit itself through to lower travel demand.

A key element in the expansion of global tourism has been the expansion of Asia, both as an inbound destination and also a major source of outbound travel driven by region's large population in excess of 2.5 billion. Growing economic prosperity, increased urbanisation, better connectivity, as well as a burgeoning and aspirational middle-class means that leisure travel is becoming a more important element in Asian lifestyles.

Inevitably, there's a very strong link between economic performance and tourism demand. Increasing wealth and improvement in peoples' personal balance sheets are good for tourism. Most developed Western economies suffered during the global economic crisis, and the impact on their tourism industries was marked. Although most have turned the corner and are on the road to recovery, progress has been mixed. Especially in Europe, where a number of Eurozone economies have looked very vulnerable – it's significant that 2016 will see GDP in the EU zone exceed the psychologically important 2%.

Elsewhere, economic growth in China has slowed, and while this is unlikely to feed through to any significant decline in tourism demand, it will probably reduce some of the spectacular growth rates seen for China in recent years. In Latin America, Brazil was the power-house economy, driving tourism from Latin America. Its economy has also gone into reverse, creating a slowdown in travellers from this part of the Americas.

Exchange rate movements can be a profound influence on travel behaviours, and recent years have seen volatile fluctuations in rates. In the UK, for instance, for several years in the last decade, overseas tourism benefited from weak Sterling, but in the past couple of years this picture has reversed. Indeed for Eurozone visitors (the main source of tourists), the UK has become 10% more expensive in the past 2 years. For visitors from the USA, the strong US Dollar means that Eurozone countries are 25% cheaper than they were 2 years ago. More recently, investor concerns over the possibility of the UK leaving the EU have seen sharp falls in the value of Sterling.

The tourism market is always at the mercy of unexpected events and their potential fallout on traveller confidence. The spectre of geo-politics is never far away. In Europe, there is an inevitable climate of uncertainty resulting from November's terrorist attacks in Paris and the potential reaction of regional governments to migrant flows. Elsewhere in the last two years, the conflict in Ukraine saw visitor numbers plummet, while sanctions against Russia with their subsequent economic impact saw major reductions in the volumes of outbound Russian travellers.

## 1.2 Understanding Global Tourism Trends

A main theme in the development of global tourism has been the especially rapid advance of the emerging economies. Over the past decade, high levels of economic growth in the Asia Pacific region, Latin America, Middle East and Africa have created new tourism axes. It means that over this period, arrivals into the emerging economies of the world have increased at a rapid 56%, while growth in the more established Western economies has grown at a slower rate of 38%.

Europe dominates the global market, with about 51% of all overseas arrivals. About 70% of visits to Europe are from within the region, and the market is led by France.

The Asia Pacific region has experienced the fastest growth of any region. Much of its travel demand is intra-regional, the trend being shaped by Chinese, Japanese and Korean travellers. In the same period, some economies in the region have become established global destinations, chief among them Thailand. More recently, there has been rapid growth in countries such as Vietnam, Cambodia, Laos and Myanmar.

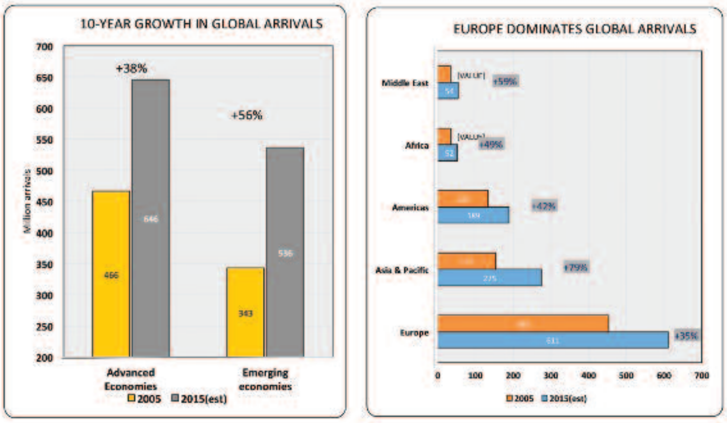
In The Americas, the USA, Mexico and Canada dominate demand from overseas visitors. South America has grown rapidly, driven mainly by the rapid economic development in Brazil. In Central America, Costa Rica, with its emphasis on eco-tourism, has also emerged as an important destination.

The main tourism destinations in Africa are South Africa, Morocco and Tunisia. In the Middle East, inbound visitor demand is concentrated among Saudi Arabia, the United Arab Emirates and Egypt.

## 1.3 Understanding Tourism in Europe

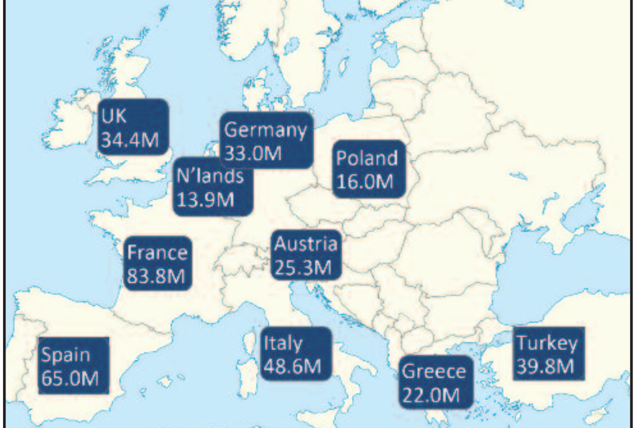
France is the World's most popular tourist destination, benefiting from its varied, all-year round offer. With nearly 84 million overseas visitors a year, it accounts for over 14% of European arrivals. Beyond France, the main visitor axes are around the Southern Mediterranean. Europe's second largest destination, Spain, suffered badly during the economic downturn, but has recovered strongly. Italy attracted nearly 49 million arrivals in 2014, while tourism demand for Greece, in spite of its economic crisis, has held up very strongly. Turkey is Europe's fourth largest tourism economy, is the fastest growing of the Top 10 destinations, having benefited from being outside the Eurozone.

### Global tourism trends




Source: United Nations World Tourism Organisation (UNWTO)

## Top10 tourism destinations




Source: United Nations World Tourism Organisation (UNWTO)

In Northern Europe, the UK is the most popular destination with 34.4 million in 2014. In recent years, it has enjoyed a boost from hosting the 2012 Olympic Games in London.

These Top 10 account for about two-thirds of arrivals into Europe. Beyond these is a long tail of small tourism economies, many of which are growing very rapidly in line with their economic development. In the Balkans region, destinations such as Serbia, Montenegro and Slovenia are still in their relative infancy, but are growing at a fast rate. In Central & Eastern Europe, Latvia, Estonia and Lithuania have created a new tourism axis in the Balkans, driven very much by demand from Russian visitors.

## 1.4 Understanding where visitors come from

In terms of sources of tourism demand, Europe is shaped by visits from within the region (about 70%), with well-established visitor flows between the countries of Northern Europe and the Mediterranean South. Tourists from Germany and the UK make the largest contribution to European visitor numbers, being particularly important to the tourism economies of France, Spain, Greece, Italy and Turkey.

Outside of Europe, Russia grew rapidly in the last decade and established itself as the biggest source of extra-European demand. But recent political and economic upheavals have had a marked impact on demand from this source, with a number of destinations in the Balkans, Baltic and Central Europe heavily reliant on Russian visitors being quite badly affected.

With the downturn from Russian visitors, the USA has re-established itself as Europe's main source of long-haul arrivals. It is also Europe's most valuable origin market.

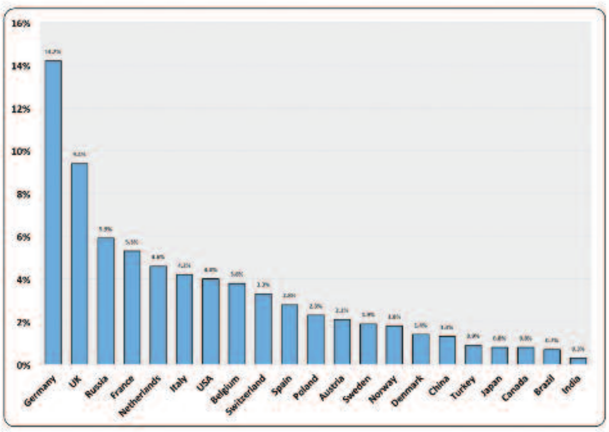
Further afield, Japan has traditionally been a valuable source of arrivals for Europe, but the market stagnated following the country's economic travails. China has now eclipsed Japan, and is growing rapidly, although its share is still a relatively small 1.3%. During its period of rapid economic growth, Brazil became the pre-eminent source of arrivals from Latin America, although its more recent economic stagnation has slowed demand growth.

## 1.5 Understanding inbound tourism to Britain

Overseas visitors to the UK are at record rates, reaching 34.4 million in 2014, having surpassed their previous high point in 2006-07. Full year data for 2015 isn't available yet, but in the year to October 2015, numbers had risen by a further 4%.

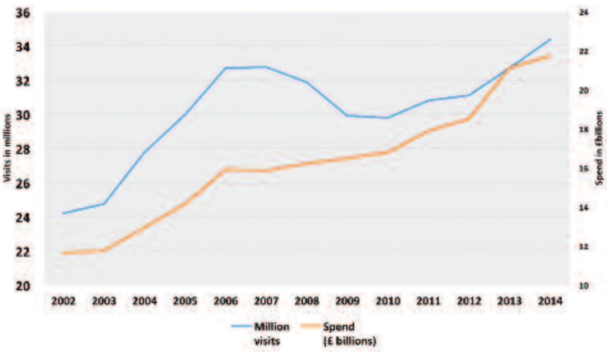
Since 2002, overseas arrivals have risen by 43%. The market was characterised by rapid growth in the early/mid years of the last decade, but growth was halted by the

## Source of visitors to Europe




Source: United Nations World Tourism Organisation (UNWTO)

## UK International visitor trends 2002 to 2014




economic downturn in 2007/2008. A large part of the fallout in demand during the financial crisis was from business visitors rather than leisure, the weakness of Sterling through this period (making the UK very attractive to Eurozone visitors) cushioning it from the worst effects of the downturn.

Since the low point of the trend cycle in 2010, when visitor arrivals dipped to just under 30 million, the market had risen 15% by 2014, attracting a further 4.6 million visitors, although this is a slightly slower rate than the 18% seen across Europe in the same period.

The showcase opportunity represented by the 2012 Olympic Games in London has benefited the UK tourism economy in its aftermath, although the impact of the legacy effect is probably now slowing.

Expenditure by overseas visitors was valued at £21.7 billion in 2014, equating to 87% growth since 2002, well in excess of inflation. A large element of this growth is attributable to the changing visitor mix, with increasing numbers of higher spending visitors from long-haul origin markets.

## 1.6 Understanding regional sources of international tourists

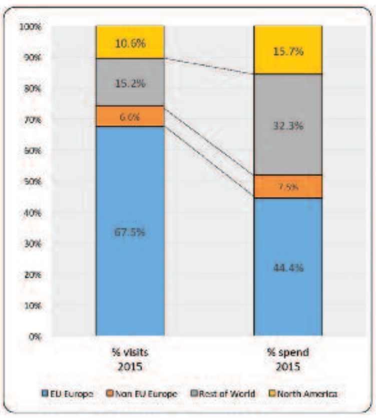
The overseas visitor mix in the UK is dominated by arrivals from EU Europe, especially the close-proximity markets of the Continent and Ireland. French and German visitors are the most numerous, their combined 7.3 million visits accounting for over one-fifth of the market, while the Irish Republic generates about 2.5 million.

While accounting for two-thirds of UK arrivals, EU European countries make a much smaller contribution to expenditure, 44%. This is because these markets have a high quotient of short-stay vacationers whose average spend is lower than the average.

About one-tenth of visitors originate from North America. The USA is the UK's third largest volume market, with almost 3 million arrivals. This level is some way below the popularity UK enjoyed among US visitors in the last decade, when mid-decade volumes were about one-third higher than at present. Expenditure-wise, the USA is the UK's most valuable source, contributing £2.7 billion in 2014, approximately 13% of total receipts, twice the level of France, the UK's largest volume market.

The Rest of World definition comprises long-haul markets beyond Europe and North America. These account for about 15% of arrivals, but double that in expenditure terms. In the last five years, large rises in leisure visitors from RoW markets

## Regional sources of International visits to the UK




| TOP 10 SOURCE MARKETS 2014 | VISITS (MILLIONS) |
|---|---|
| France | 4.11 |
| Germany | 3.22 |
| USA | 2.98 |
| Irish Republic | 2.49 |
| Spain | 1.99 |
| Netherlands | 1.97 |
| Italy | 1.76 |
| Poland | 1.49 |
| Belgium | 1.12 |
| Australia | 1.06 |

Source: ONS International Passenger Survey


**International visits to UK in 2014 breakdown by region**

have been the main growth driver from these countries, rising by one-third, making a significant contribution to the overall rise in UK holiday visitors in this period.

Volume wise, Australia is the largest RoW market, having recorded substantial growth in the last ten years as a result of the very attractive exchange rate resulting from the strong Australian Dollar. China has attracted much attention in recent years, and at present the UK welcomes about 100,000 visits a year, the overwhelming majority being attracted to London.

RoW markets are the highest spending in the overseas tourism mix, with Chinese visitors some of the most valuable with an average spend of £1500 (the all market average is £630). Even more lucrative markets are evident in the Middle East, where average expenditures spends can reach three times the average.

The distribution of overseas visitors to the UK is heavily skewed towards London, its 17.4 million visits in 2014 representing 51% of all UK arrivals. The London market is very different to that in the provinces, benefiting from a particularly high quotient of short-break leisure visitors from close-proximity Europe. Since the downturn in visitor numbers resulting from the financial crisis, London has recovered more quickly, as well as at a higher rate, than the rest of the country, so that its overall share of visitors has grown.

It is estimated that less than 10% of London's overseas visitors travel further afield to other parts of the country, although this figure varies widely by different source markets. The general pattern is that long-haul visitors are more inclined to include other UK regions in their itineraries than visitors from Europe.

Since 2010, while London has set the pace with an 18% rise in visitors from overseas, the Rest of England has increased volumes by about 1.6 million, equivalent to 10.5% growth. The standout growth regions have been in the North Country, with Yorkshire (32% more visitors since 2010) and the North West (+16%) experiencing the largest rises

South West England received about 2.2 million overseas visits in 2014, giving it a 6.4% share of the UK market. Along with the North East, South West England has experienced the lowest growth rate (2.6%) across the UK since 2010, which suggests that the relative remoteness and lack of transport infrastructure in both regions is a potential inhibitor of growth.

Among the principalities, Scotland has fared the best in recent years, growing the volume of visits by one third of a million in the period 2010-2014. Edinburgh dominates the Scottish visitor landscape, and it is frequently paired with London as a popular multi-destination itinerary. Wales, in contrast, has struggled to grow its overseas visitor count, its relative remoteness and less developed transport links potentially hampering its growth outlook.

## 1.7 Understanding South West England's international visitors

Overseas visitors to South West England region reached 2.19 million in 2014, making it the third most popular English regional destination with a 6.3% share, level pegging with the North West. Apart from London and the South East, South West England has the highest ratio of overseas visitors to population, at a figure of 0.43 visitors per head of population.

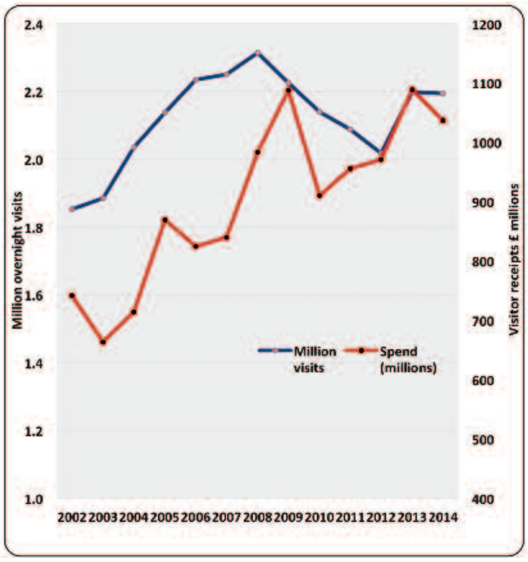
Tourism receipts from overseas visitors to South West England amounted to £1.04 billion in 2014, just under 5% of the UK's total. This reflects a relatively low average visitor spend relative to the rest of the country.

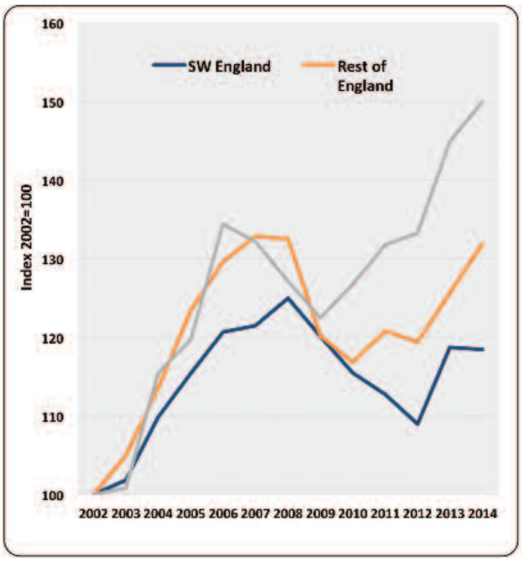
Overseas visitors stayed for a total of 17.48 million nights in 2014, 6.6% of the national total. This is higher than the region's share of visitors, on account of the higher than average length of stay.

## South West overseas visitor market in 2014 - key indicators

- Overseas visitors in 2014, 2.19 million.
- Tourism receipts to the value of £1.04 billion.
- Generating 17.48 million overnights.
- Average length of stay 8.0 days (UK 7.7/RoE 8.8)
- Average spend £472 (UK£632/RoE £511)
- Average spend per day £59 (UK £82/RoE £58)

## South West England International visitor trend 2002-2014




Source: ONS International Passenger Survey

Reflecting the lower cost of tourism services in the region, as well as the high proportion of VFR visitors, the average spend per day is a relatively low £59. However, if the skewing impact of London is removed from this calculation, the figure is very much in line with that for the Rest of England.

In pure volume terms, day visits (from within the immediate region and outside) dominate South West England's tourism economy. These totalled 146 million in 2014, generating expenditure worth £4.69 billion, which means South West England region is the UK's fourth largest day trip destination, with a 9% share. London and the South East account for 31% of all day visits, while the next most popular region is North West England with about 160 million visitors (10% of UK).

South West England is the UK's most popular destination for domestic staying visitors, with 17.31 million visits in 2014, representing 15% of the UK total. They generated receipts of £3.93 billion, a 17% share of UK expenditure.
Taking the totality of tourism activity for the region, overseas visitors account for just over 1.2% of all visits, but if day visits are removed from the calculation, about 11% of all overnight visitors. Overseas visitors generated about 12% of tourism receipts in 2014, while accounting for 22% of nights stayed

## South West all tourism in 2014

| Category | No. of visits | Receipts | No. of nights |
|---|---|---|---|
| Domestic overnight | 17.31 million | £3.93 billion | 62.7 million |
| Overseas overnight | 2.19 million | £1.04 billion | 17.5 million |
| Day visits | 146 million | £4.69 billion | - |

Source: ONS International Passenger Survey; The GB Day Visitor 2014 (VisitEngland/TNS; GB Tourism Survey 2014 (Visit England)

The 2.19 million overseas visitors to South West England region in 2014 was a small reduction (not statistically significant) from the previous year. Since 2012, there has been an increase in overseas numbers of about 100,000. Over the longer term since 2002, arrivals increased by about one-third of a million, a rise of 18%.In the first two quarters of 2015 (the most recent data available) visits were up by 1.4%, while in the whole of the UK volumes had advanced a further 3.2%. These numbers in the South West have struggled to fully recover the volumes achieved prior to the financial crisis and the highpoint in 2008, when 2.31 million visitors came to the region from overseas. Numbers are still about 100,000 down on that year's peak.

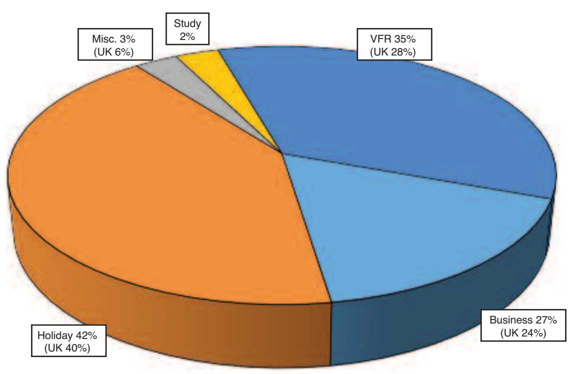
The trend curve shows that the downturn in overseas tourism numbers in South West England was longer lasting than in the rest of the UK, where 2010/2011 marked the low point in visitor activity prior to recovery. In South West England, the downwards trend continued through to 2012.

Expenditure from overseas visitors 2014 reached £1.04 billion in 2014, equivalent to 40% growth since 2002, slightly less than the rate of inflation over the same period. The region accounted for 4.8% of UK international receipts in 2014 (6.4% in 2002). Since 2010, receipts have grown rapidly as arrivals numbers declined, although in the2014, this growth track appears to have stalled.

The development of the overseas market in South West England against the rest of the country is shown in the graph on the right hand side. Since 2002, the overall shape of the trend is characterised by an initial period of rapid growth, followed by sudden disruption resulting from the financial crisis, and then a subsequent period of recovery.

In the first few years of the last decade, coinciding with a period of strong economic growth through the major western economies, the UK market grew quickly, but growth in South West England generally underperformed the growth seen elsewhere in London and the Rest of England. The recessionary impact on tourism demand was not only deeper in South West England than in the rest of the country, but has been more sustained, while yet to reach the levels seen in 2007/08.

**Reasons for visiting South West England**




Source: ONS International Passenger Survey

Holiday visits totalling 915,000 made the largest contribution to South West England's overseas visitor mix in 2014, a share of 42%, slightly higher than UK average of 40%, but considerably higher than for the Rest of England (27%). Since 2002, holiday arrivals have driven the region's overseas visitor economy, increasing their share of all visits from 33% to 42%. Although volumes reduced during the financial crisis, significantly, they have now recovered the pre-recessionary high seen in 2010.

Expenditure generated by holidaying arrivals was worth £415 million in 2014, a doubling in the period since 2002. The average spend for holiday visitors in South West England was £458 (lower than the national average of £638), while the average length of stay 6.3 nights.

Overseas tourists staying in South West England for the purpose of Visiting Friends and Relations (VFR) reached 771,000 in 2014, accounting for 35% of arrivals, much in line with the share seen for the Rest of England (excluding London). VFR visitors have a lower than average trip spend (£374), while staying for an average of 9.2 nights. Levels of VFR visits are still slightly lagging the levels seen for the peak year of 2009.

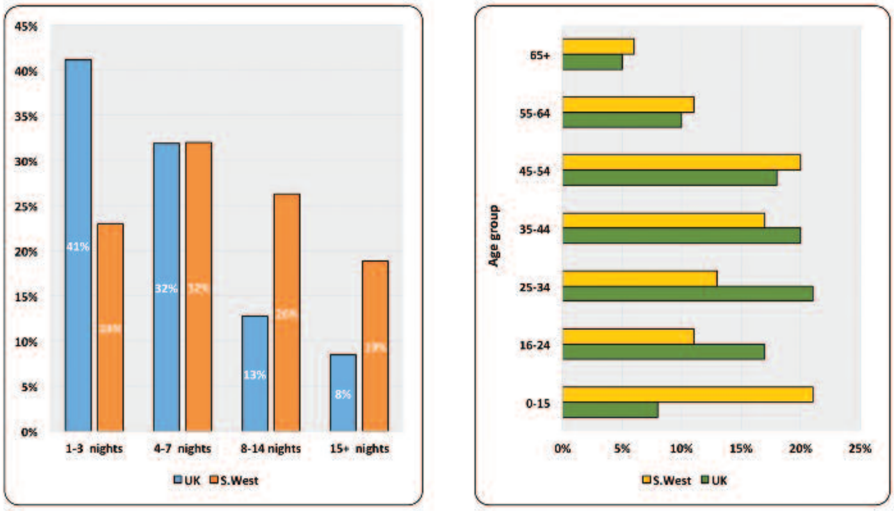
The 377,000 business arrivals in South West England in 2014 accounted for 17% of overseas visitors to South West England. Relative to the rest of the country, this was about one-third lower than for the Rest of the UK. There is a relationship between economic performance and business visitor arrivals; South West England accounts for about 7.3% of the UK's economic output, while its proportion of business arrivals is lower at 4.5%.

As with the business travel category across most of the country, the fallout in visits during the financial crisis was marked, and the volume of business arrivals in the region is still about 18% fewer than their high mark in 2008.

The strength of South West England's holiday sector shapes the length of time visitors stay in the region. The fundamental shape is that the region enjoys a much higher proportion of longer stays than the national average, but at the other end of the spectrum, the short stay sector is under-represented.

45% of overseas visitors to South West England stay for periods in excess of 8 nights, considerably in excess of the 21% seen throughout the UK, and 30% in the Rest of England (excluding London). To some extent, this also

## Length of stay and age profile of overseas visitors to South West England




Source: ONS International Passenger Survey

reflects the high proportion of VFR visitors to the region. About one-third of visitors stay for 4-7 nights, on par with national levels.

The region appears to experience a significant shortfall of short stay visitors, with only 23% staying for this length of time. While the national figure of 41% is skewed by the inclusion of London, the share seen in South West England is still far short of the 38% level seen for the Rest of England (excluding London).

The dynamics of average stay trends vary from region to region (these are typically shaped by factors such as the location of gateways, the pulling power of attractions, and ease of access to main communications), but it appears that the SW may be struggling to reach its share of multi-destination visitors.

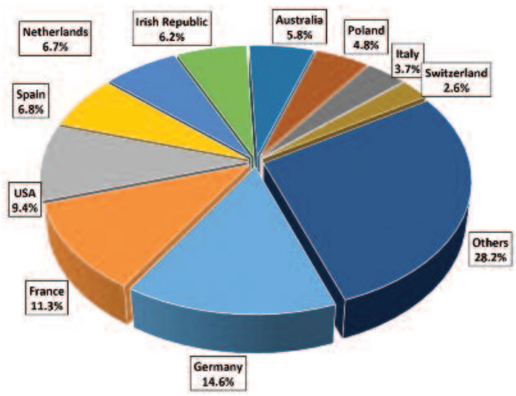
The profile of holiday visitors in the region displays a marked skewing towards family visitors, hence the considerably higher proportion of young visitors in the 0-15 age group.

Much of the most rapid growth in tourism demand is coming from the Millennials generation, those in the 18-34 age bracket. In South West England, this key group is very under-represented, with only 24% of holiday visits in the category, compared with 38% nationally.

Germany is South West England's largest inbound source market, its 319,000 arrivals in 2014 representing 14.6% of total volumes and a similar share of receipts.  Germany has vied with France as the leading market in the region, but in the most recent period has pulled away to establish itself as the leading source. The German market increased by 40% in the twelve year period from 2002, but that progress was halted by the financial crisis; volumes have almost recovered to their pre-recession level. Holiday visits dominate German travel, reaching about 200,000 in 2014, about 62% of its total trips, and twice the volumes from the French market.

The French market is the region's second largest, with just under a quarter of a million visitors in 2014, a share of 11.3%. It generates a much smaller share of receipts, only 7%. After a period of rapid growth from 2002 to 2009, the market has contracted, with almost 90,000 fewer arrivals in 2014 than in 2009. The profile of French visitors contrasts with Germany's, having a much lower quotient of holiday

## South West England International Visitor profile 2014 - Top 10




Source: ONS International Passenger Survey arrivals (39%), and a substantially higher proportion of VFR visits (39%), factors that explain the market's relatively low share of expenditure.

The USA is the region's largest long haul origin market, its 205,000 visitors in 2014 representing 9.4% of the market and a similar share of receipts. As with the rest of the UK, trans-Atlantic visitors have markedly declined since 2002, reducing by one-quarter over this period, a loss of about 70,000 in South West England. However, since the financial downturn, the market has rallied, increasing quite strongly in the last four years. About one-half of US arrivals are from holiday visitors.

Australia is South West England region's second largest long-haul market with a 5.8% share of arrivals in 2014, but generating expenditure of 7%, a similar value to France's. The market is comprised almost exclusively of holiday (50%) and VFR visits (46%). It experienced a period of rapid growth in the last decade as a result of a very strong Australian Dollar, but has steadied in recent years as exchange rates moved nudged upwards.

Arrivals from the Irish Republic amounted to 137,000 in 2014, but appear to have been in relative freefall since 2009, reducing in size by about one-third, and reflecting the deep recessionary climate in Ireland and its impact on tourism demand. The market has a very high proportion of VFR visits (42), with about one-third coming from holiday visits.

Elsewhere in Europe, Spain (6.8% share) has yet to recover its pre-recession level. This market is characterised by a very high level of VFR visits (50%). The Netherlands is about the same size of Spain's, and dominated by holiday visits. Poland has experienced exceptional 6-fold growth since 2002, driven by substantial growth in business arrivals, accounting for 53% of visits in 2014.

## Overseas visitors by South West County in 2014

| | Visits (thousands) | Spend (£ million) |
|---|---|---|
| Bristol UA | 431 | 162 |
| Devon | 444 | 192 |
| Cornwall | 335 | 138 |
| Gloucs | 284 | 116 |
| Dorset | 336 | 182 |
| Wiltshire | 287 | 97 |
| Bath/NE Somerset | 253 | 90 |
| Somerset | 192 | 66 |

Source: The South West Research Company (TSWRC)

With the rise in Chinese visitors under the spotlight, their numbers in South West England were about 10,000 in 2014, about three times the volumes seen in 2002.

The destinations of overseas visitors once they've arrived in the South West are shaped by a factors such as: (1) the location of key access points to the region; (2) areas of main population; (3) the location of key tourism assets, especially those attracting holidaying visitors; (4) the distribution of economic activity around the region.

The region's largest city, Bristol (defined as Bristol Unitary Authority) accounts for about 17% of overnight stays by overseas visitors to the region. In 2014, the city welcomed an estimated 430,000 staying visitors, a volume similar to the size of its population. As well as Bristol's large population and diverse economic base, it is the main gateway to the region for air travellers. The profile of visitors skews towards holiday stays, these accounting for nearly 48%, while business trips account for a relatively high 21%, reflecting the city's economic dominance in the region.

35% of the South West's overseas visits are to Cornwall and Devon, and not surprisingly, their profiles are dominated by holidayers, 72% and 49% respectively. Business visitors are under-represented in both counties, each in single figure percentages. Devon has quite a high VFR component at 34%, potentially boosted by the 45,000 student population distributed between the main cities Exeter and Plymouth.

Exeter (52,000 visits) and Plymouth (72,000 visits) also have an advantage as gateway locations, with the region's second largest airport at Exeter providing direct connections to continental Europe, while ferry services from Plymouth link directly to France and Spain.

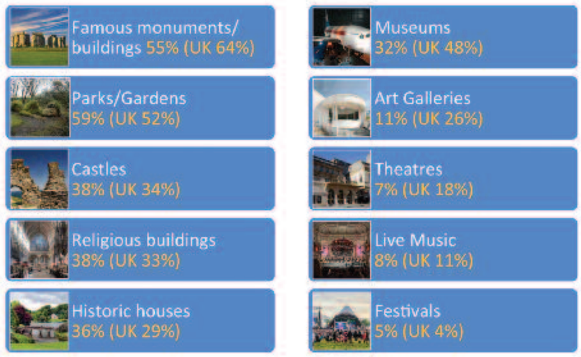
Bath and North East Somerset's 253,000 visitors in 2014 gave it an 11% share of South West visitors. With the dominant attraction the city of Bath, the visitor mix is dominated by holiday (58%) arrivals, with business visitors amounting to about one fifth of visits. The remainder of Somerset county received approximately 192,000 overseas trips in 2014, about 9% of the region total.

Gloucestershire welcomed approximately 284,000 visitors in 2014. With the Cotswolds its key tourist destination, and supported by the appeal of Gloucester and Cheltenham, VFR (38%) and holiday visits (38%) dominate the overseas visitor mix. The county has one of the higher shares for business arrivals in the South West at 17%, to some extent benefiting from the halo of Bristol and the economic activity around the M5 corridor heading towards The Midlands.

Dorset's popularity among overseas visitors is anchored around the Bournemouth/Poole axis, with visitor totals of 175,000 representing just over one-half of total overseas visits to the county in 2014. The visitor profile is dominated by holidaying (44%) and VFR (34%) visitors. Bournemouth has a large population of English language students, which in turn generates VFR demand. The Bournemouth/Poole area also has a gateway advantage, with Bournemouth's airport serving 27 destinations in Europe, while Poole has direct sea links into Northern France.

Wiltshire has an 11% share of overseas visitors to the South West region, with the county's most popular attraction, Stonehenge, receiving 1.34 million visitors in 2014. However, many overseas visitors to the attraction come as day visitors, often residing in other cities outside the region, most notably London. As well as nearby Stonehenge, Salisbury's iconic cathedral is also an important draw, the city receiving about 100,000 overseas visits in 2014. While VFR visits are the most numerous in the county (42%), business visitors are also well represented with about one fifth of the county's total overseas trips.

**Popularity of heritage attractions and cultural attractions**




Source: Visit Britain 2013, based on holiday visitors

## 1.8 Understanding South West England's attractiveness to international visitors

Visit Britain research on the activities of holiday visitors in the UK gives a valuable insight into South West England region's key appeal among overseas tourists. While South West England is well established among domestic visitors with standout attractions such as Stonehenge, Tintagel Castle and the Eden Project, the rich heritage resources spread throughout the region and engage strongly with overseas visitors.

Holiday visits in South West England were more likely to involve visiting parks and gardens than in any other region, featuring in 60% of visits. 55% involved famous monuments and buildings, slightly less than the overall UK total (which is skewed by London), but higher than for almost all English regions outside the capital.

Other heritage themed attractions – castles, religious buildings and historic houses – were each included in over one-third of holiday visits. These figures are the highest of all the English regions outside London and the South East.

The popularity of cultural attractions is inevitably determined by their availability and relative pulling power, so any analysis of UK visitors is distorted by London's inclusion. One third of holiday visits to South West England included a museum, and one-tenth a visit to an art gallery. These levels are lower than the UK overall, but much in line with several English other regions.

### Popularity of eating out, drinking and socialising


Source: Visit Britain 2013, based on holiday visitors

### Popularity of visiting rural/coastal locations and taking part in outdoor/sports


Source: Visit Britain 2013, based on holiday visitors

While music and festivals have relatively small appeal for overseas visitors, their levels in South West England stand up well alongside national levels. The appeal of visiting literary and film attractions is also evident, but again in small numbers, with about 3% of visits taking in such locations. For instance, the Rosamund Pilcher adaptations and their depictions of the region on German TV are a lure for visitors from Germany.

Relative to the whole of the UK, South West England has a lower proportion of visits involving dining in restaurants, but in contrast, more visitors going to pubs. Socialising with the locals, has very strong appeal (54%), one of the highest levels in the country. Clearly there is a very positive perception of the friendliness of South West England population, a valuable tourism asset.

Although South West England has a number of nightlife hotspots for holidaying visitors, generally for overseas visitors the appeal of bars and clubs is not great. This is partly explained by the large element of visitors travelling with children to the region.

Visits to South West England are just as likely to involve shopping as in other regions in the England outside London, with almost 70% of visitors doing so at some point in their trip. Shopping for clothes and accessories is the most popular category of shopping, while souvenirs are also a very popular purchase.

### Popularity of visiting of visiting other attractions/participating in other activities


Source: Visit Britain 2013, based on holiday visitors

The region features many iconic village locations, ranging from the villages of the Cotswolds to the coastal harbours of Cornwall. 55% of holiday visitors included visiting a village in their trip, much the highest proportion of any English region.

23% of holiday visitors went on a tour in the region, only slightly lower than the UK figure, but higher than for any other English region.  Tours in the region encompass a wide array of destinations, attractions and themes.

Learning activities also span a broad range of subject areas and content, and engage strongly with holiday visitors to South West England. One-fifth included a learning activity, well in excess of any other region in the country.

The outdoor resources in South West England exemplified by its coasts, national parks and compelling natural scenery, gives the region a substantial advantage as a 'natural' destination. Several core elements of South West England's natural offer engage far more strongly with visitors than anywhere else in the UK.

58% of holiday visits included a walk in the countryside, much the highest of any region. About a quarter of visits included a visit to one of the region's two national parks, vying with Yorkshire in terms of popularity.

No other English region can compete with the appeal of South West England region's coasts/beaches – half of all holiday visitors included a beach trip in their schedule, and 37% a walk by the coast.

# 2. The UK as an Inbound Market for the Trade

**An insight into how consumers arrange their travel and how the industry works in key origin markets.**

## A changing landscape

ETOA, the European tourism association, was founded by five group operators in 1989 to act as a voice for the industry in Brussels. At the time there were several important pieces of legislation that affected the sector and they joined forces to make their case for reform. In 2016 ETOA numbers over 200 'operators', as well as a further 600 suppliers of product across Europe. Plenty of these still follow a traditional coach operator model, but plenty more sell Europe to their clients in a huge variety of ways, while others sell only to the industry itself. As a starting point it is worth taking a moment to consider some of the factors that have changed the landscape in the last quarter century.

Clockwise from top left: the fall of the Berlin Wall; the Schengen Agreement; the Lisbon Treaty; the Internet; the Euro; expansion of the EU to 28 countries; mobile technology; the Open Skies Agreement.


## Travel flows like never before

Travel in Europe, and by extension for those coming to Europe has become more and more fluid, both physically and technologically. The extra freedom of movement brought about by the fall of the Iron Curtain, the introduction of the Schengen Area and the Open Skies Agreement coupled with the expansion of the EU has had an impact not just on European citizens but also on those coming from markets further afield such as the US. While the UK is not part of the Schengen Area or the Euro, it has followed this general trend and the economic importance of tourism to Europe as a whole is reflected in the special place it has in the Lisbon Treaty of 2009.

*USA, Canada, Germany, Australia, New Zealand, the Netherlands, Flanders plus Scandinavia and Ireland
The real game-changer, however, has been technology. The Internet has revolutionised travel opening up how, where and when consumers can make choices. Hand-held technology has heightened this with people making decisions as they travel in a way that would not have been possible just 10 years ago. All of this would suggest that the only 'game in town' are Online Travel Agencies (OTAs) but that is far from the case. If anything the industry is more multi-faceted (and complicated) than ever; the good news is that there are more channels to market than ever.

We will now look in turn at three different models of operators, consider what motivates consumers to choose that mode of travelling and look at specific cases in the markets identified.

## Group operators

The decline of group travel has been predicted for a while and yet the sector continues to constitute an important part of the travel industry. Why?

**Travelling in a group is still very popular in Europe for several reasons:**

- it is perceived to be cheaper than booking all the individual elements of a tour oneself.
- it is hassle free – the Tour Guide takes care of all the arrangements for the group and usually all the porterage is included.
- group passengers feel more secure and less anxious in foreign countries than those travelling independently
- many people prefer to take a coach tour because they do not want to have to drive in countries where they do not speak the language and have to drive on the other side of the road.
- travelling in a group is time efficient and well planned by the operator.
- positive interaction with other members of the group is often listed as a benefit of group travel.
- one of the big trends in recent years has been to emphasise that travelling in a group does not necessarily mean forgoing individuality – there is far more choice offered in every aspect of the tour.
- group operators have also tapped into the popularity of t the experiential travel trend – for example including learning about how to cook local specialities.

**There are two major types of Group tours:**

- **scheduled** with fixed published departure dates which can be general or specialised in content.
- **custom or ad hoc tours** which also can be general or specialised in content but are operated only on the date requested by the group which may comprise of individuals or pre-organised groups such as schools or associations.

**General Scheduled tours:** these follow a pre-determined itinerary and have fixed departure dates which are listed in the branded brochures and online; departures for the oncoming summer season are launched in August /September of the preceding year; passengers book directly with the operator by phone, via a travel agent/consultant or online; North American or AUS/NZ passengers are more likely than European passengers to use a travel agent because they are often travelling to Europe for the first time and are spending more money and need more advice and reassurance; they are also more likely to book several months in advance however there has been an increase in more last minute booking recently; scheduled tours are designed for all age groups with itineraries which reflect their respective interests; scheduled tours have changed radically since they began in the late 1960s with the advent of cheaper air travel and are now far more experiential and inventive with their inclusions and itineraries.

**Special interest Scheduled tours:** these are scheduled group tours which are appealing to a niche market. They usually have fewer departures than the regular group tour operators. They may be academic in content and have both a specialist guest lecturer as well as a regular Tour Guide and often have additional lectures in the evenings. They may be designed around attending performances of opera or concerts in certain cities. They are likely to be more expensive than the regular group tours.

**Custom or Ad hoc tours:** these are custom made tours which are designed by an operator specifically to satisfy the requirements of a group client on a 'one off basis' on a particular requested date. The group client might be a group of friends, members of an organisation or of an extended family. The itineraries are often following a shared special interest like gardens, battlefields or family history.

**Educational Tours:** these are tours designed by specialised operators for schools and colleges – particularly in North America and Germany – which are sold to the students who are accompanied on the tour by their teachers and lecturers. The tour content is usually designed to enhance their academic studies. Some are customised for an individual school group but in the case of North America, different school groups are often combined onto.

## FITs – Fully Independent Travellers

It would seem that self-packaging is the way that many independent travellers work these days. They book their flights (or train), choose a hotel off an OTA, through Tripadvisor or even directly and then off they go with a guidebook (or an app) and a bunch of recommendations.

Look again at this picture and you'll soon see that it is not that black and white. OTAs offer accommodation 'plus', airlines have deals with hotels and hire cars, while your hotel can also provide those transfers you'll need when you arrive. While you are on your trip you might decide that you want to engage in some sort of activity; there are local agencies putting together that dream boat trip or excursion into the moors, but there are also a number of international websites that offer activities which can booked as you travel around. Meanwhile walking tours have blossomed with ever more inventive themes and people who have experienced them elsewhere will seek them out again. This is an example of individual travellers temporarily coming together to form a group. Equally it might surprise people to hear that the travel agent is still there not just to sell group trips but also to help as a 'travel consultant'. We live in an age with so many resources at our fingertips but a combination of personal service and information overload have ensured their survival.

## Wholesalers

The role of the wholesaler may be invisible to the customer but is very important in any conversation about how a destination is sold and how travel product reaches a customer. Ground handlers often specialise in certain destinations or countries and sell packages of services such as accommodation, transport and guides. This is particularly of use to an operator who may not have expertise in a certain destination and wishes to deliver part or all of a trip to a client to the standard they expect.

Major international wholesalers have a large inventory, particularly of accommodation and tend to work with a variety of markets. It is not uncommon for them to sell services on to other wholesalers so that a product may pass through several intermediaries before being delivered to the client.

Both are an invaluable resource for understanding what different markets look for, what is selling well and what is missing or could be improved in destinations. They can give you the pulse of the industry and a surprisingly large amount of product is sold on through them.

## Five takeaway points

1. Technology has radically changed how everyone makes their travel choices, particularly in the FIT sector.
2. Group travel is still popular and will remain relevant in years to come. It is important to understand that it's not a one size fits all model and to realise that even the 'mass tourism' of the past is seeking to provide a more personalised service and experience.
3. The long haul markets of North America and Australia and New Zealand, are more likely to seek out a travel organisation due to length, distance and complexity of their travels. But many European markets still have sizeable organised travel sectors and even the truly independent traveller reverts at times to the trade.
4. While they don't deal directly with clients, the wholesalers can have one of the most global views of the market, working as they do with a number of business clients. They are therefore an invaluable resource for destinations.
5. Given all of these various channels to market, ask yourself who you should be talking to.

# 3. The Inbound Trade

The main companies and organisations involved:

Here is a list of different operators and wholesalers who have helped by giving their feedback (subject to addition/change). For a full list of operators and wholesalers please go to:

www.etoa.org/member-search
www.ukinbound.org/search-members

## Group operators

| |
|---|
| Cosmos/Globus (group operator) (US/Can/Aus/NZ) |
| Trafalgar and Insight (group operators) (US/Can/Aus/NZ) |
| Worldstrides (educational operator) (US/Can) |
| EF (educational operator) (US/Can) |
| Rick Steves Europe (small group operator) (US/Can) |
| Back-Roads touring (small group operator) (US/Can/Aus/NZ) |
| Belco (small group operator) (Bel) |
| Jan De Wit (group operator) (NL) |
| Abercrombie and Kent (US) |
| CIE Tours International (US) |

## FIT

| |
|---|
| Get Your Guide (all markets) |
| Viator (all markets) |
| England Ferien (HTS Touristik) (Ger) |
| HotelRoomAuction.com (NL,Bel) |
| Expedia (all markets) |
| HotelPlanner.com (all markets) |

## Wholesalers/ground handlers

| |
|---|
| Service Reisen Giessen (Ger) |
| Albatross (Ger/US/Aus) |
| Sovereign (US/Ger) |
| Select Travel (US/Can) |
| Axis and Globe (Scandinavia) |
| Abercrombie and Kent (US) |
| Cashel Travel (US/Ger) |
| JAC Travel (US/Can/Ger) |
| GTA (all markets) |

## How operator businesses contract with you, the supplier?

This depends very much on the size and the model of the operator. Most group operators offering different destinations will divide up contractors along geographical lines. Larger operators will also distinguish between accommodation and other services. Those working on scheduled tours will be looking for a series of allocations at hotels with the same number of nights and also group reservations following a regular pattern for attractions. Ad hoc groups will by definition have different lengths of stay and product needs depending on each trip. In general, the longer haul the market, the longer lead-in time. This is important as contractors will be setting prices and bookings 12 to 18 months out.

There are also product developers looking to include new destinations but in some cases their catalogue for 2018 will already be prepared in 2016, so you need to be ready for a longer lead in.

Plant the seed now and down the line you may bear fruit. Nearer markets in Europe may book later due to lower costs and proximity. If you are looking for low-season visitors then contracting with niche markets will help.

FIT, Free Independant Travel (individual travellers), generally offer a shorter term market, although be aware that many people in the Northern Hemisphere make decisions in the darker months of winter. An activity website or an online accommodation website can add your product at any time.

They will again have people developing their offer on geographical lines and will work by receiving a commission for the sales they make of your product. They will also be keen to have product whose description and images fit their overall offer.

Specialist ground handlers (wholesalers) tend to handle regional product or tours on a case by case basis so while you might contract with a person responsible for your area, it will ultimately be used by people who design itineraries for clients. There is a lot of attention to detail with customised itineraries, so that you might end up dealing with several people, but it is particularly worth the effort to get yourself on the books if the product you have appeals to a certain sector.

Large wholesalers sell to many markets and are a warehouse of product. In this case your contact point might have quite a specific role or area and you will be added to their inventory. They often sell on to other wholesalers and you can find that your product might pass through another intermediary before arriving with the operator.

**The best way to meet and do business with operators, wholesalers and other intermediaries in the UK and at overseas events and missions:**

National tourist boards run missions in different overseas markets and it is worth keeping an eye on their various initiatives and information. If you are a local supplier, it is worth seeing if your local tourist board is taking part in such missions.

Trade shows offer a chance to exhibit your product to a large sector of the travel industry but it is important that you make people aware of your attendance. Most trade shows offer the chance to set up appointments with operators, who will be circulating round the hall. There is also a certain amount of serendipity in these events, where a passerby will find out more about your product.

Targeted workshops where you receive pre-arranged appointments are a very focussed way of doing business but you have to be prepared. They are generally based on short 12-15 minute meetings and are about discovering who you could, and sometimes couldn't work with. They provide structure and save time. But they require follow up.

There are also social and networking events that offer a chance to mix in a more informal way but it is good to know who is attending.

Finally, you could plan a trip to a number of operators. Plenty of destinations, attractions, hotels and other services plan organised trips to meet operators and wholesalers. Many wholesalers are based in and around London, opening up those channels to market.

## What you need to do to ensure that you are ready to receive customers via the trade?

**This section will expand with feedback from the operators above but here are a few pointers:**

- Pay attention to their booking patterns and also understand that a group may lose or add a few pax. Where possible, flexibility breeds good relationships.
- Look at what other similar products offer elsewhere in Europe; don't be afraid to learn from others.
- Make sure you know where your clients are from. Because product may pass through an intermediary, it is good to know who is turning up at your place.
- Find out what the 'hot buttons' are of clients. Ask operators what they will appreciate in terms of welcome, information and interest.
- Stay in touch with the trade; it's a moveable feast and just when you think you might not find anything new, it arrives.
- Work with other South West England tourism business, your local DMO and VisitBritain.

## Some tips for working with the trade in different markets

**US and Canada**

- The group market has a longer planning cycle – 12-18 months is very typical – some educational groups even plan on a two year basis due to fundraising
- The travel agent has not disappeared as people still like a personal advisor - your route to them remains through tour operators and wholesalers
- Videos on You Tube are gold dust for selling – providing usable copy and images aids the process as well
- Longer itineraries are acceptable to this market but location of accommodation is often important
- As access will likely be through London and Birmingham, you may need to be aware of the routes from there to your destination

**Australia and New Zealand**

- The market is returning to longer-term planning but people are rotating their destinations (the World Cup effect) and will choose Europe every so often
- There are more repeat travellers rather than people making the one big trip of their life
- Stays are longer than average, particularly in the youth market and seasonality is different – March is late summer and popular
- Operators are selling against many other destinations in Asia and North America - Europe's strength is not necessarily what it once was and operators need to be armed with good information
- Shared language and other points of familiarity mean people often self-drive in the UK before joining a continental European programme

**Germany**

- The market is quite price-sensitive so while quality is important other aspects such as hotel locations, non-guided visits and included meals can be negotiated to control costs
- Two 'non-negotiables' are a decent cold breakfast spread and cleanliness
- Groups will generally plan no earlier than a year out – group travel is popular as people less confident of driving on British roads (left side and roundabouts)
- Detail is important in contracting and you must be prepared to pay due attention to the administrative side – but once something is agreed and signed it stays that way
- While most Germans speak good English, conducting final agreements in German can help avoid misunderstandings and make the operator feel more secure

**Netherlands and Flanders**

- The Dutch market is very price-competitive but negotiations are very clear and direct
- There is a high proportion of independent travellers
- It's a good market for niche product and there are no language barriers
- Auction based websites are very popular for purchasing travel in the Netherlands
- The Flemish market runs along much more traditional lines – group coach operators, travel agencies

**Scandinavia**

- Trade fairs are disappearing but smaller roadshows are still very popular as are business lunches
- Weakening currencies have made the outbound market to the UK far more price-sensitive – group operators will be looking for ways of keeping costs under control
- Transport providers such as Norwegian Airlines have a much larger role to play and are making self-packaging easier
- On the other hand the decline of ferry routes across the North Sea has seen a drop in the group sector
- Suppliers need to be informed about the offer around them just not their own product e.g. hotels know local attractions and other amenities, attractions aware of local accommodation offers – in countries like Norway this is very normal

**Ireland**

- Proximity means that transport providers such as ferry companies and airlines are a major player offering ancillary services
- Operators are looking for 'Celtic' connections and there is a loyalty to Irish brands
- Events, especially sports, are a major market driver
- A significant portion of the groups sector is social clubs and similar groupings
- Given the shorter nature of trips, operators are price-sensitive but their clients will nonetheless spend once in the destination

# 4. Working with your Destination Marketing Organisation (DMO) and other Regional and National Bodies

Your local DMO will either have their own, or be part of the South West Travel Trade Group. Contact your nearest DMO to find out what meetings already exists that you can attend. DMOs are continually working together and in partnership with business and each other to maximise collective budgets and represent your destination.

**Bath**
**Bath Visitor Information Centre**
Abbey Chambers, Abbey Churchyard
Bath BA1 1LY
Key contact: Katie Sandercock
T: 01225 322 448
E: katie_sandercock@bathtourism.co.uk
www.visitbath.co.uk

**Bristol**
**Destination Bristol**
53 Queen Square
Bristol BS1 4LH
Key contact: Jon Chamberlain
T: 0117 946 2209
E: jon.chamberlain@destinationbristol.co.uk
www.visitbristol.co.uk

**Cornwall**
**Visit Cornwall**
Beacon Place, Station Approach
Victoria, nr St Austell
Cornwall PL26 8LG
Key contact: Malcolm Bell
T: 01208 811152
E: malcolm.bell@visitcornwall.com
www.visitcornwall.com

**Devon**
**Visit Devon**
**Exeter**
Contact: Victoria Hatfield
T: 01392 265104
E: Victoria.hatfield@exeter.gov.uk

**Torquay**
Contact: Carolyn Custerson
T: 01803 296296
Carolyn.custerson@englishriviera.co.uk

**Plymouth**
Contact: Amanda Lumley
T: 01752 307268
E: Amanda.lumley@plymouth.gov.uk
www.visitdevon.co.uk

**Dorset**
**Visit Dorset**
**West Dorset District Council**
Contacts: Amanda Park/Cheryl Stapleton
Tel: 01305 252241
E: tourism@westdorset-weymouth.gov.uk
www.visit-dorset.com

**Bournemouth Tourism**
Contacts: Melissa Atkins/Sheena Leaman
Tel: 01202 451707
tourism.marketing@bournemouth.gov.uk
www.bournemouth.co.uk/lovegroups

**Poole Tourism**
Key contact: Graham Richardson
T: 01202 262539
E: G.Richardson@pooletourism.com
www.pooletourism.com

**Forest of Dean**
**Wye Valley & Forest of Dean Tourism**
Unit 1C, Mushet Industrial Park
Crucible Close
Coleford GL16 8RE
Key contact: Maureen McAllister
T: 01594 888216
E: maureen@wyedeantourism.co.uk
www.wyedeantourism.co.uk

**Isles of Scilly**
**Islands Partnership**
Steamship House
Hugh Street, Hugh Town
Isles of Scilly TR21 0LJ
Key contact: David Jackson
T: 01720 424036
E: davidjackson@islandspartnership.co.uk
www.visitislesofscilly.com

**Somerset**
**Somerset Tourism Association**
Wookey Hole Caves
Wookey Hole, Wells
Somerset BA5 1BB
Key contact: Bob Smart
T: 01749 835416
E: bob@visitsomerset.co.uk
www.visitsomerset.co.uk

**The Cotswolds**
**Cotswolds District Council**
Trinity Road
Cirencester GL7 1PX
Key contact: Susie Hunt
T: 01285 623000
E: Susie.hunt@cotswold.gov.uk
www.cotswolds.com

**Wiltshire**
**VisitWiltshire**
Pennyfarthing House
18 Pennyfarthing Street
Salisbury
Wiltshire SP1 1HJ
Key contact: Florence Wallace
T: 01722 232036/07436 588860
E: flowallace@visitwiltshire.co.uk
www.visitwiltshire.co.uk

As noted in section 3, the best way to meet and do business with operators, wholesalers and other intermediaries in the UK and at overseas events and missions. National tourist boards run missions in different overseas markets and it is worth keeping an eye on their various initiatives and information. If you are a local supplier, it is worth seeing if your DMO/local tourist board is taking part in such missions.

Trade shows offer a chance to exhibit your product to a large sector of the travel industry. Targeted workshops where you receive pre-arranged appointments are a very focussed way of doing business. Ask your local DMO if they are attending these events and if there are options for you to attend in partnership with them. Regional or national DMOS may have discounted rates to attend trade shows and networking events.

For more information about national tourist board missions and events including overseas missions, events and exhibitions visit: **www.visitbritain.org/events-calendar**

For information on how to package your product to suit a particular theme or interest group visit:
**www.visitengland.com/biz/information-of-interest/toolkits?sort=date#toolkits&travel%20trade**

To register your business for regular updates from Visit Britain visit:
**www.trade.visitbritain.com/en-uk/**

For business and advice across a broad range of subjects from Quality Assessment to Skills development visit:
**www.visitengland.com/biz/advice-and-support/businesses**

**To contact VisitEngland or VisitBritain's Travel Trade Team:**

| | | | |
|---|---|---|---|
| VisitBritain | Kevin Jones | Kevin.Jones@visitbritain.org | |
| VisitEngland | Stuart Heath | Stuart.Heath@visitengland.org | 020 7578 1440 |
| VisitEngland | Claire Burdall | Claire.Burdall@visitengland.org | 020 7578 1455 |

**For on territory advice in your key markets:**

| | | |
|---|---|---|
| North America | carl.walsh@visitbritain.org | +212 (0) 850 0338 |
| Australia and New Zealand | mark.haynes@visitbritain.org | +61 (0) 28 247 2272 |
| German speaking markets | birthe.pohlmeyer@visitbritain.org | +49 (0) 30 3157 1912 |
| Flemish speaking Belgium and Netherlands | Marieke.vandijl@visitbritain.org | +31 (0) 20 607 7704 |
| Scandinavia | asa.nordquist@visitbritain.org | +46 (0) 708 754 841 |

# 5. Appendix

## South West Areas Overseas Staying Visitor Data

The data contained in this report has been compiled by South West England Research Company (TSWRC) with the aim of providing a quick reference section to enable readers to be able to find key overseas visitors statistics for each of the areas in South West England. The data has been compiled using two data sources;

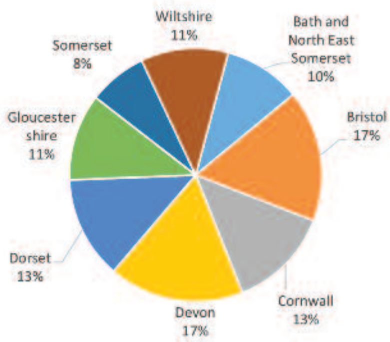
- **The International Passenger Survey (IPS)** – The IPS provides a wide range of overseas visitor statistics to a range of geographical levels with a large amount of data being freely available on the VisitBritain website. Due to relatively small sample sizes at a county level and below three year average data (2012-2014) has been used in this report where data has been obtained directly from the survey.
- **The Cambridge Model** – The Cambridge Economic Impact Model is operated under license by TSWRC. The model utilises information from national tourism surveys and regionally/locally based data. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level. The model has been widely used in both South West England and across areas of England for a number of years and the data contained within this report for overseas visitors has been derived directly from IPS data. The model uses local data to adjust IPS survey data and reduce the potential impacts of small sample sizes and as a result single year data has also been provided in this report for 2014, however, it should be noted that figures may not match those published by IPS due to the modelling process. The Model in its basic form relies on using information from a range of sources. The methodology and accuracy of these sources varies and therefore the estimates can only be regarded as indicative of the scale and importance of visitor activity in the local area. Thus the Model cannot take account of any leakage of expenditure in and out of the local area from tourists taking day trips in or out of the area in which they are staying. While it is assumed that these may broadly balance each other in many areas there will be an underestimate in relation to overseas day visits from holiday accommodation in London to locations receiving significant numbers from that source.

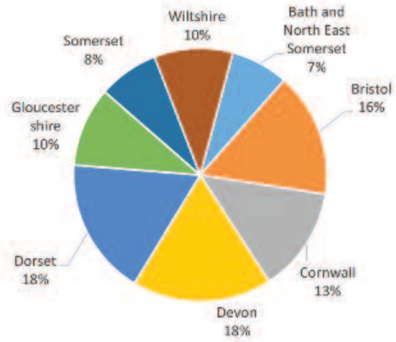
## Points of note

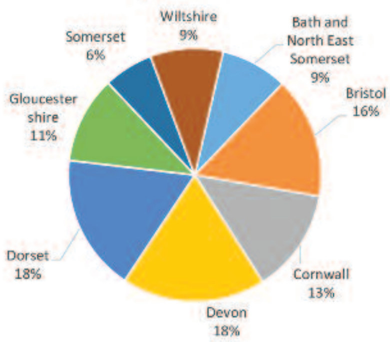
- **Abbreviations** – Where necessary for presentation purposes the following abbreviations have been used in this report; NPT – Nights per trip; £PN – Spend per night; BANES – Bath and North East Somerset.
- **Purpose of trips** – The IPS records the many different reasons people have for making a visit. VisitBritain combines these into five main analysis categories; Holiday, Business (including conference and trade fair visits), Visiting friends or relatives (VFR), Study and Miscellaneous (including study, medical treatment or shopping). The categories describe the main purpose of the visit and, where it is not possible to determine this, the respondents' reason for the visit is categorised as 'miscellaneous' and these are shown as 'other' trips in this report. Whilst data has been provided in this report for 'other' trips no commentary has been provided in the comparison section as the category covers a wide range of reasons which are unlikely to be influenced by tourism marketing and promotion and happen for other reasons.
- **Other accommodation types** – A breakdown of the accommodation used by overseas visitors is provided in this report covering the main accommodation types used with an 'other accommodation type'. Included in this category are; Static vans/holiday centres, Group/campus, Second homes, Boat moorings and other types not categorised elsewhere.
- **Visitor origins** – To give a fuller picture of overseas visitor origins the top ten markets for each area has been provided. Where any of the target markets for this project fall outside of the top ten details of the market have been provided along with its ranked position within the area.

## SOUTH WEST AREAS OVERSEAS STAYING VISITOR DATA (2014)

| Area | Trips | Nights | Spend | Overseas % of all staying trips to area |
|---|---|---|---|---|
| Bath and North East Somerset | 253,000 | 1,286,000 | £89,483,000 | 26.1% |
| Bristol | 431,000 | 2,778,000 | £162,217,000 | 20.3% |
| Cornwall | 335,100 | 2,344,700 | £138,357,000 | 7.9% |
| Devon | 444,000 | 3,120,000 | £192,454,000 | 8.0% |
| Dorset | 336,000 | 3,069,000 | £182,759,000 | 9.8% |
| Gloucestershire | 284,000 | 1,775,000 | £116,198,000 | 14% |
| Somerset | 192,000 | 1,347,000 | £66,175,000 | 7.7% |
| Wiltshire | 287,000 | 1,754,000 | £97,310,000 | 16.3% |
| **South West** | **2,250,000** | **17,570,000** | **£1,050,460,000** | **10.2%** |




## SOUTH WEST AREAS OVERSEAS STAYING VISITOR DATA COMPARISONS (2014)

| Purpose of trip | South West region | BANES | Bristol | Cornwall | Devon | Dorset | Gloucestershire | Somerset | Wiltshire |
|---|---|---|---|---|---|---|---|---|---|
| Holiday | **49.1%** | 58.5% | 48.7% | **71.6%** | 49.1% | 44.3% | 37.7% | 45.3% | **32.1%** |
| Business | **15.1%** | 20.2% | **21.3%** | **5.1%** | 10.4% | 11.3% | 18.7% | 14.6% | **21.3%** |
| Visits to friends and relatives | **30.6%** | **17.4%** | 25.1% | 21.5% | 34.2% | 34.2% | 38.0% | 34.9% | **41.8%** |
| Other | **2.5%** | **1.2%** | 1.9% | 1.5% | 2.5% | 2.7% | 3.2% | **4.7%** | 3.5% |
| Study | **2.9%** | 2.4% | 3.0% | **0.3%** | 3.8% | **7.4%** | 2.5% | 0.5% | 1.4% |
| Holiday NPT | **5.7** | **3.9** | 4.6 | **5.9** | 4.9 | 5.8 | 4.1 | 5.6 | 4.2 |
| Business NPT | **4.9** | **3.1** | 3.7 | **7.1** | 5.8 | 6.9 | 3.4 | 3.6 | 3.4 |
| Visits to friends and relatives NPT | **9.7** | **7.5** | 8.8 | 9.1 | 7.7 | 9.1 | 7.9 | **10.1** | 8.0 |
| Other NPT | **15.3** | 6.3 | 6.9 | **29.4** | 23.8 | 26.2 | 5.4 | **3.6** | 5.6 |
| Study NPT | **32.6** | 33.5 | 36.4 | **14.0** | 21.0 | 26.0 | 35.7 | **56.0** | 36.0 |
| Holiday £PN | **£71.17** | £79.79 | £70.35 | £65.92 | £72.73 | £70.23 | **£84.78** | **£63.03** | £72.19 |
| Business £PN | **£93.62** | £102.42 | £90.28 | **£81.32** | £89.71 | £86.54 | **£108.61** | £108.52 | £93.10 |
| Visits to friends and relatives £PN | **£39.76** | £42.59 | £37.55 | £40.14 | £44.21 | £42.70 | **£45.35** | **£23.75** | £38.65 |
| Other £PN | **£76.61** | £119.05 | £103.73 | **£58.71** | £64.53 | £62.36 | £126.82 | **£153.84** | £106.52 |
| Study £PN | **£55.99** | £53.62 | **£47.32** | £55.79 | £62.70 | £60.53 | £57.11 | **£66.59** | £48.65 |

**NPT=Nights per trip / £PN=Spend per night** — **Highest** — **Lowest**

**Holiday trips** – Cornwall had the largest proportion of holiday trips and Wiltshire the smallest. Cornwall also had the longest length of stay and BANES the shortest. Gloucestershire had the highest spend per night and Somerset the lowest.

**Business trips** – Bristol and Wiltshire had the highest proportion of business trips and Cornwall the lowest. Cornwall had the longest length of stay and BANES the shortest. Gloucestershire had the highest spend per night and Cornwall the lowest.

**Visits to friends and relatives (VFR)** – Wiltshire had the highest proportion of VFR trips and BANES the lowest. Somerset had the longest length of stay and BANES the shortest. Gloucestershire had the highest spend per night and Somerset the lowest.

**Study trips** – Dorset had the highest proportion of trips and Cornwall the lowest. Somerset had the longest length of stay and Cornwall the shortest. Somerset had the highest spend per night and Bristol the lowest.

## SOUTH WEST AREAS OVERSEAS STAYING VISITOR DATA COMPARISONS (2014)

| Accommodation used for trips | South West region | BANES | Bristol | Cornwall | Devon | Dorset | Gloucestershire | Somerset | Wiltshire |
|---|---|---|---|---|---|---|---|---|---|
| Serviced | **45.9%** | **54.7%** | 48.2% | 47.1% | **39.4%** | 46.4% | 40.1% | 43.8% | 50.5% |
| Self catering | **4.8%** | **1.3%** | 1.9% | **15.6%** | 5.2% | 3.9% | 4.2% | 3.6% | 1.7% |
| Touring caravans/tents | **4.6%** | 0.7% | **0.1%** | 8.5% | 6.1% | 5.4% | 4.9% | **10.4%** | 3.1% |
| Staying with friends and relatives | **32.5%** | 27.5% | 32.4% | **23.9%** | 36.9% | 32.7% | **37.7%** | 30.2% | 36.6% |
| Other accommodation types | **12.1%** | 15.9% | **17.3%** | **4.8%** | 12.4% | 11.3% | 13.0% | 12.0% | 8.7% |

Highest Lowest

**Serviced accommodation trips** – BANES had the highest proportion of staying trips in serviced accommodation and Devon the lowest.

**Self catering trips** – Cornwall had the highest proportion of self catering trips and BANES the lowest.

**Touring caravan/tent trips** – Somerset had the highest proportion of touring caravan/tent trips and Bristol the lowest.

**Staying with friends and relatives trips** – Gloucestershire had the highest proportion of VFR trips and Cornwall the lowest.

**Other accommodation trips** – Bristol had the highest proportion of trips using other accommodation types and Cornwall the lowest.

## SOUTH WEST AREAS OVERSEAS STAYING VISITOR DATA COMPARISONS (2012-2014)

| Duration, mode of transport and quarter of trip | South West region | BANES | Bristol | Cornwall | Devon | Dorset | Gloucestershire | Somerset | Wiltshire |
|---|---|---|---|---|---|---|---|---|---|
| 1-3 nights | **21.1%** | 15.3% | **33.7%** | **6.3%** | 12.3% | 16.6% | 22.7% | 15.3% | 24.0% |
| 4-7 nights | **31.8%** | **33.1%** | 31.8% | **28.5%** | 31.8% | 31.8% | 29.5% | 33.1% | 31.6% |
| 8-14 nights | **26.0%** | 28.2% | **20.6%** | **37.4%** | 30.6% | 25.8% | 25.9% | 28.2% | 26.8% |
| 15+ nights | **21.0%** | 23.3% | **13.9%** | **27.8%** | 25.3% | 25.8% | 22.0% | 23.3% | 17.7% |
| Air | **65.0%** | 68.8% | 71.9% | **51.4%** | 54.9% | 63.6% | **73.6%** | 68.8% | 56.7% |
| Sea | **26.3%** | 22.8% | 22.5% | **41.8%** | 35.3% | 26.1% | **19.8%** | 22.8% | 31.5% |
| Tunnel | **8.7%** | 8.5% | **5.5%** | 6.7% | 9.9% | 10.3% | 6.7% | 8.5% | **11.8%** |
| January-March | **14.0%** | **31.3%** | 17.2% | **6.4%** | 9.8% | 14.3% | 13.2% | 14.0% | 14.4% |
| April-June | **28.1%** | **12.7%** | 27.3% | **31.8%** | 29.1% | 26.0% | 30.1% | 29.8% | 28.5% |
| July-September | **40.0%** | 40.5% | **35.6%** | **52.3%** | 46.2% | 42.5% | 37.7% | 38.7% | 39.7% |
| October-December | **17.8%** | 15.6% | **20.0%** | **9.4%** | 14.9% | 17.3% | 19.0% | 17.4% | 17.4% |

Highest Lowest

**Duration of stay** – Cornwall had the largest proportion of 8-14 nights and 15+ nights trips and Bristol the smallest. In contrast Cornwall had the smallest proportion of 1-3 nights and 4-7 nights trips with Bristol having the largest proportion of 1-3 nights trips and BANES the largest proportion of 4-7 nights trips.

**Mode of transport to the UK** – Gloucestershire had the largest proportion of trips from overseas visitors arriving in the UK by air and Cornwall the smallest. In contrast, Cornwall had the largest proportion of arrivals by sea with Gloucestershire having the smallest. Wiltshire had the largest proportion of arrivals by tunnel with Bristol having the smallest.

**Quarter of trip** – Cornwall had the highest proportion of trips in both April to June and July to September with BANES having the lowest in April to June and Bristol the lowest in July to September. In contrast, Cornwall had the lowest proportion of trips in January to March and October to December with BANES having the highest in January to March and Bristol the highest in October to December.

## SOUTH WEST AREAS OVERSEAS STAYING VISITOR DATA COMPARISONS (2012–2014)

| Target markets for visitor origin | South West region | BANES | Bristol | Cornwall | Devon | Dorset | Gloucestershire | Somerset | Wiltshire |
|---|---|---|---|---|---|---|---|---|---|
| Australia | **6.4%** | **11.4%** | 4.1% | 7.4% | 9.0% | 5.2% | 7.5% | 8.9% | 6.6% |
| Austria | **0.8%** | 0.2% | 1.4% | 1.8% | 0.9% | 1.2% | 0.5% | 0.4% | 0.8% |
| Denmark | **1.5%** | 1.5% | 1.7% | 1.5% | 1.6% | 2.5% | 0.9% | 1.5% | 1.5% |
| Germany | **14.5%** | 12.2% | 12.3% | **32.4%** | 19.0% | 18.7% | 10.6% | 12.0% | 13.1% |
| Irish Republic | **6.1%** | 4.9% | 7.4% | 4.2% | 3.7% | 4.1% | 9.8% | 5.9% | 5.3% |
| Netherlands | **6.3%** | 4.9% | 4.4% | 6.1% | 7.4% | 6.0% | 7.8% | 6.0% | 8.4% |
| New Zealand | **1.3%** | 1.7% | 1.4% | 1.4% | 1.1% | 1.3% | 1.0% | 1.7% | 1.4% |
| Norway | **1.3%** | 1.5% | 0.9% | 1.4% | 1.2% | 2.1% | 1.8% | 1.2% | 1.4% |
| Sweden | **1.3%** | 1.3% | 1.3% | 1.9% | 1.4% | 1.1% | 1.4% | 1.1% | 2.0% |
| Switzerland | **2.5%** | 2.4% | 3.0% | 3.8% | 2.8% | 3.1% | 1.5% | 2.2% | 2.6% |
| USA | **9.2%** | **17.3%** | 7.2% | 7.2% | 7.2% | 6.7% | **14.6%** | 12.7% | 8.3% |

**Highest**

**Target markets for visitor origins** – Broadly speaking there are similarities across all of the areas in terms of the proportions of the target markets attracted compared to the regional profile overall with the exception of;

BANES – Larger proportion of Australian and USA visitors.

Cornwall – Larger proportion of German visitors.

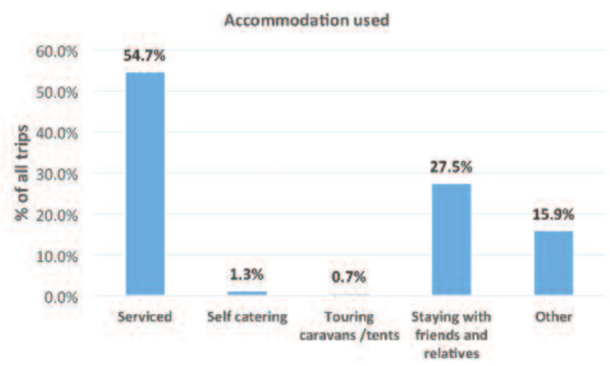
Gloucestershire – Larger proportion of USA visitors.

## BATH AND NORTH EAST SOMERSET – 2014 OVERSEAS STAYING VISITOR DATA

| Trips | Nights | Spend |
|---|---|---|
| **253,000** | **1,286,000** | **£89,483,000** |

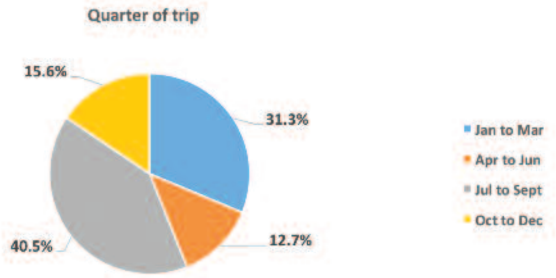

| Business turnover supported | Employment supported (Full time equivalent) | Employment supported (Estimated actual) |
|---|---|---|
| **£121,586,000** | **1,700** | **2,300** |

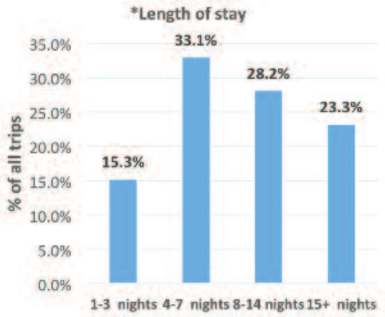
| Purpose of trip | Average nights per trip | Average spend per trip | Average spend per night |
|---|---|---|---|
| Holiday | 3.89 | £310.53 | £79.79 |
| Business | 3.14 | £321.31 | £102.42 |
| Visits to friends and relatives | 7.52 | £320.41 | £42.59 |
| Other | 6.33 | £754.00 | £119.05 |
| Study | 33.50 | £1,796.33 | £53.62 |
| **All trips** | **5.08** | **£353.69** | **£69.58** |

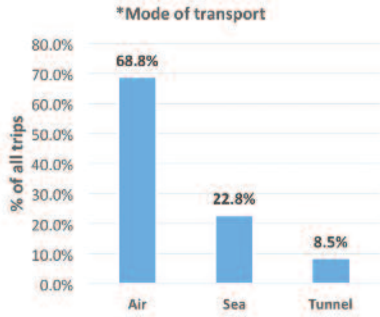


## BATH AND NORTH EAST SOMERSET OVERSEAS STAYING VISITOR DATA (2012 – 2014 AVERAGES)

| Rank | Market of origin | % of all trips |
|---|---|---|
| 1 | USA | 17.3% |
| 2 | Germany | 12.2% |
| 3 | Australia | 11.4% |
| 4 | France | 10.9% |
| 5 | Spain | 7.1% |
| 6 | Netherlands | 4.9% |
| 7 | Irish Republic | 4.9% |
| 8 | Italy | 4.2% |
| 9 | Belgium | 2.7% |
| 10 | Canada | 2.5% |
| 11 | Switzerland | 2.4% |
| 12 | New Zealand | 1.7% |
| 14 | Norway | 1.5% |
| 16 | Denmark | 1.5% |
| 17 | Sweden | 1.3% |
| 34 | Austria | 0.2% |



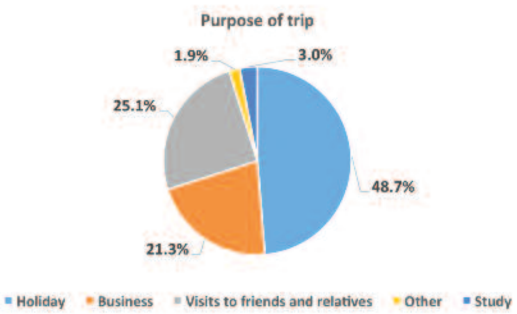



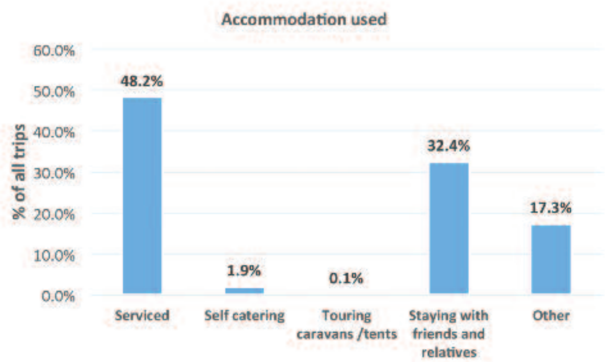

* Data not available for Bath and North East Somerset. Somerset county data displayed.

## BRISTOL – 2014 OVERSEAS STAYING VISITOR DATA

| Trips | Nights | Spend |
|---|---|---|
| 431,000 | 2,778,000 | £162,217,000 |

| Purpose of trip | Average nights per trip | Average spend per trip | Average spend per night |
|---|---|---|---|
| Holiday | 4.58 | £321.93 | £70.35 |
| Business | 3.73 | £336.59 | £90.28 |
| Visits to friends and relatives | 8.77 | £329.25 | £37.55 |
| Other | 6.88 | £713.13 | £103.73 |
| Study | 36.38 | £1,721.62 | £47.32 |
| **All trips** | **6.45** | **£376.37** | **£58.39** |

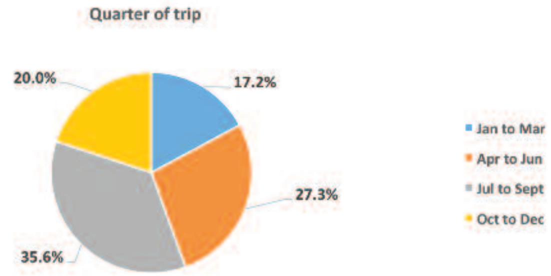


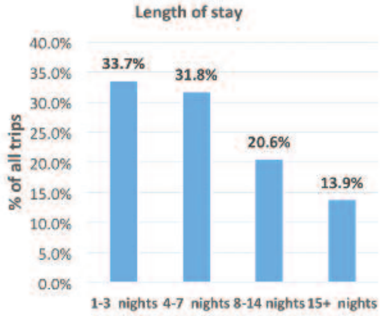



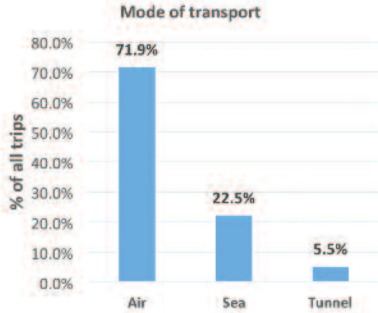

| Business turnover supported | Employment supported (Full time equivalent) | Employment supported (Estimated actual) |
|---|---|---|
| £241,752,000 | 3,200 | 4,300 |

## BRISTOL OVERSEAS STAYING VISITOR DATA (2012 – 2014 AVERAGES)

| Rank | Market of origin | % of all trips |
|---|---|---|
| 1 | France | 12.8% |
| 2 | Germany | 12.3% |
| 3 | Spain | 8.5% |
| 4 | Irish Republic | 7.4% |
| 5 | USA | 7.2% |
| 6 | Poland | 6.6% |
| 7 | Netherlands | 4.4% |
| 8 | Australia | 4.1% |
| 9 | Italy | 3.6% |
| 10 | Other Eastern Europe | 3.3% |
| 11 | Switzerland | 3.0% |
| 14 | Denmark | 1.7% |
| 15 | Austria | 1.4% |
| 17 | New Zealand | 1.4% |
| 18 | Sweden | 1.3% |
| 21 | Norway | 0.9% |



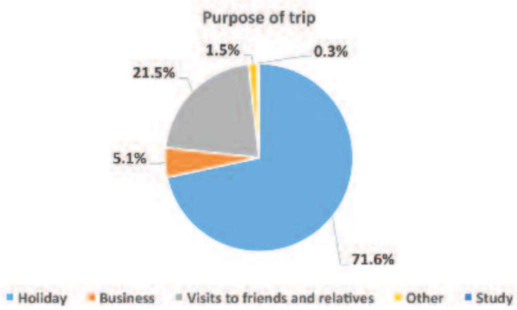



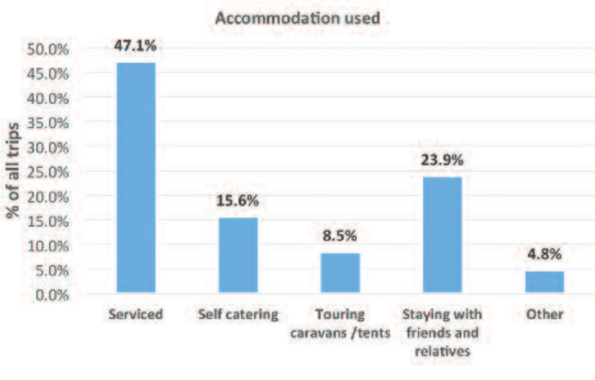




## CORNWALL AND ISLES OF SCILLY – 2014 OVERSEAS STAYING VISITOR DATA

| Trips | Nights | Spend |
|---|---|---|
| 335,000 | 2,345,000 | £138,357,000 |

| Purpose of trip | Average nights per trip | Average spend per trip | Average spend per night |
|---|---|---|---|
| Holiday | 5.87 | £386.80 | £65.92 |
| Business | 7.12 | £578.82 | £81.32 |
| Visits to friends and relatives | 9.10 | £365.35 | £40.14 |
| Other | 29.42 | £1,727.20 | £58.71 |
| Study | 14.00 | £781.00 | £55.79 |
| **All trips** | **7.00** | **£413.01** | **£59.00** |

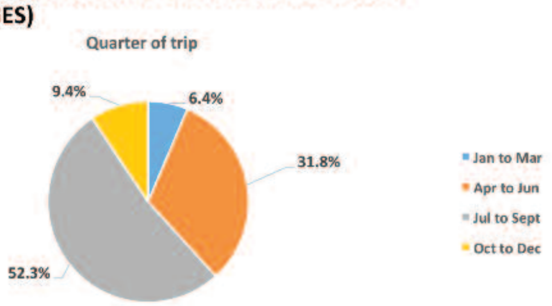


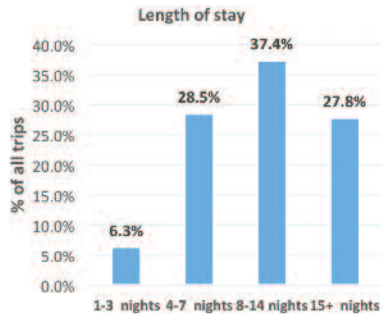



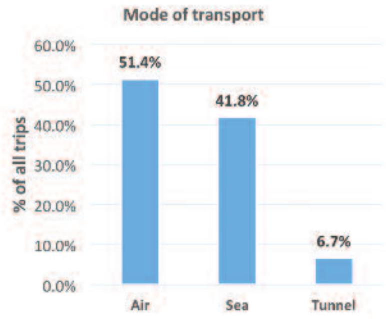

| Business turnover supported | Employment supported (Full time equivalent) | Employment supported (Estimated actual) |
|---|---|---|
| £211,997,000 | 3,300 | 4,400 |

## CORNWALL AND ISLES OF SCILLY OVERSEAS STAYING VISITOR DATA (2012 – 2014 AVERAGES)

| Rank | Market of origin | % of all trips |
|---|---|---|
| 1 | Germany | 32.4% |
| 2 | Australia | 7.4% |
| 3 | France | 7.3% |
| 4 | USA | 7.2% |
| 5 | Netherlands | 6.1% |
| 6 | Belgium | 4.3% |
| 7 | Irish Republic | 4.2% |
| 8 | Switzerland | 3.8% |
| 9 | Italy | 3.5% |
| 10 | Canada | 3.5% |
| 12 | Sweden | 1.9% |
| 13 | Austria | 1.8% |
| 14 | Denmark | 1.5% |
| 16 | Norway | 1.4% |
| 17 | New Zealand | 1.4% |

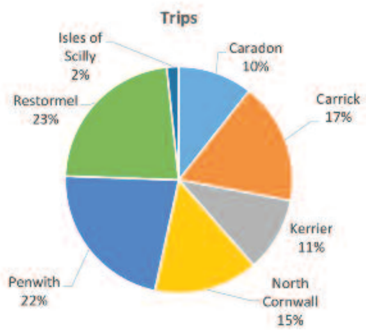


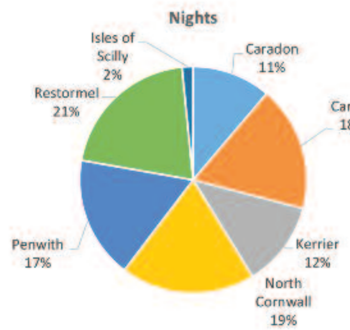



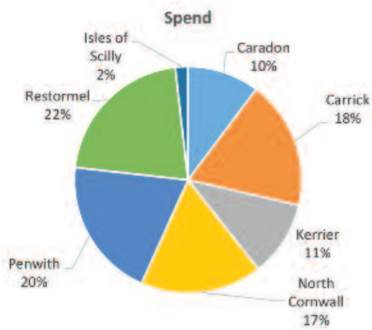




## CORNWALL AND ISLES OF SCILLY - 2014 DISTRICT LEVEL OVERSEAS STAYING VISITOR DATA

| Area (former local authorities) | Trips | Nights | Spend |
|---|---|---|---|
| Caradon | 35,000 | 259,000 | £13,917,000 |
| Carrick | 57,000 | 412,000 | £24,942,000 |
| Kerrier | 35,000 | 281,000 | £14,658,000 |
| North Cornwall | 49,000 | 442,000 | £23,575,000 |
| Penwith | 73,000 | 402,000 | £27,245,000 |
| Restormel | 75,000 | 477,000 | £29,123,000 |
| Isles of Scilly | 5,600 | 36,300 | £2,448,000 |



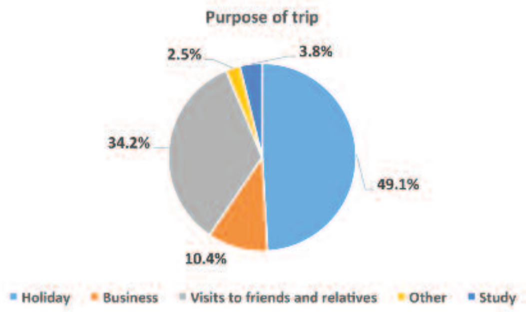



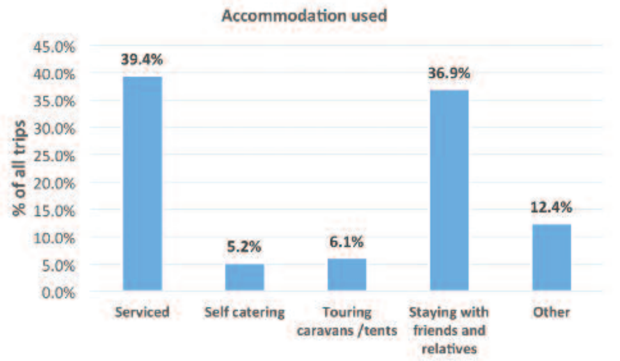



## DEVON – 2014 OVERSEAS STAYING VISITOR DATA

| Trips | Nights | Spend |
|---|---|---|
| 444,000 | 3,120,000 | £192,454,000 |

| Purpose of trip | Average nights per trip | Average spend per trip | Average spend per night |
|---|---|---|---|
| Holiday | 4.89 | £355.62 | £72.73 |
| Business | 5.85 | £524.63 | £89.71 |
| Visits to friends and relatives | 7.66 | £338.84 | £44.21 |
| Other | 23.82 | £1,537.00 | £64.53 |
| Study | 21.00 | £1,316.76 | £62.70 |
| **All trips** | **7.03** | **£433.45** | **£61.68** |

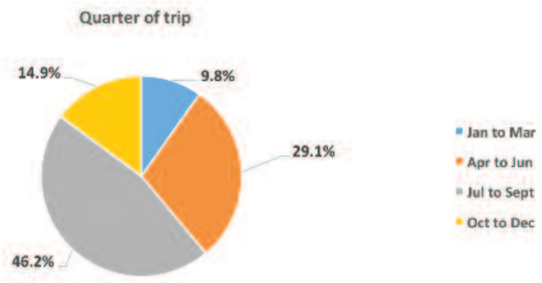


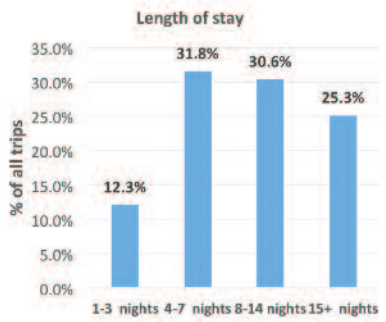



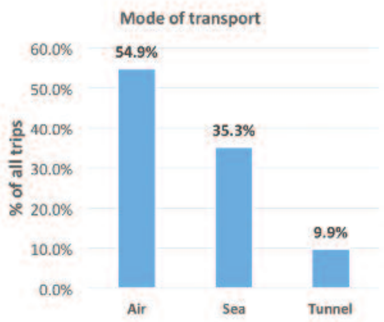

| Business turnover supported | Employment supported (Full time equivalent) | Employment supported (Estimated actual) |
|---|---|---|
| £301,053,000 | 4,500 | 5,900 |

## DEVON OVERSEAS STAYING VISITOR DATA (2012 – 2014 AVERAGES)

| Rank | Market of origin | % of all trips |
|---|---|---|
| 1 | Germany | 19.0% |
| 2 | France | 15.0% |
| 3 | Australia | 9.0% |
| 4 | Netherlands | 7.4% |
| 5 | USA | 7.2% |
| 6 | Spain | 4.5% |
| 7 | Irish Republic | 3.7% |
| 8 | Canada | 3.2% |
| 9 | Italy | 3.0% |
| 10 | Switzerland | 2.8% |
| 14 | Denmark | 1.6% |
| 15 | Sweden | 1.4% |
| 17 | Norway | 1.2% |
| 18 | New Zealand | 1.1% |
| 21 | Austria | 0.9% |

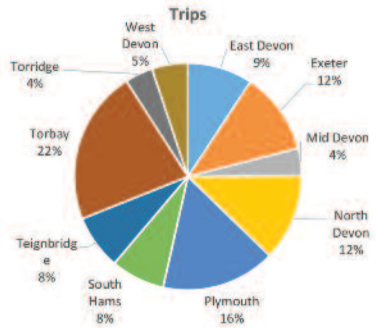


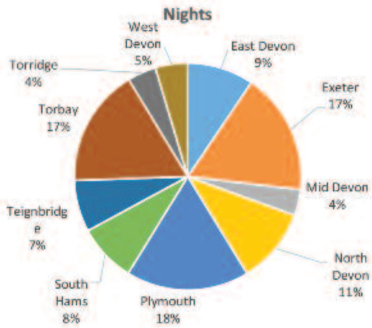



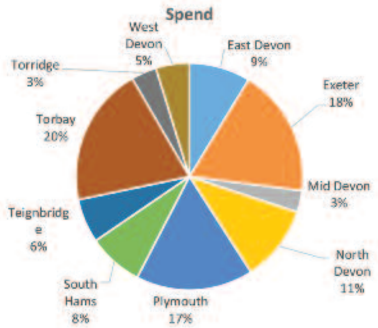



## DEVON - 2014 DISTRICT LEVEL OVERSEAS STAYING VISITOR DATA

| Area | Trips | Nights | Spend |
|---|---|---|---|
| East Devon | 41,000 | 295,000 | £16,779,000 |
| Exeter | 52,000 | 542,000 | £35,152,000 |
| Mid Devon | 17,000 | 115,000 | £5,881,000 |
| North Devon | 55,000 | 335,000 | £20,891,000 |
| Plymouth | 72,000 | 547,000 | £32,159,000 |
| South Hams | 34,000 | 259,000 | £15,136,000 |
| Teignbridge | 34,400 | 229,400 | £12,044,000 |
| Torbay | 97,200 | 525,200 | £38,251,000 |
| Torridge | 17,600 | 127,300 | £6,962,000 |
| West Devon | 22,700 | 144,000 | £9,198,000 |



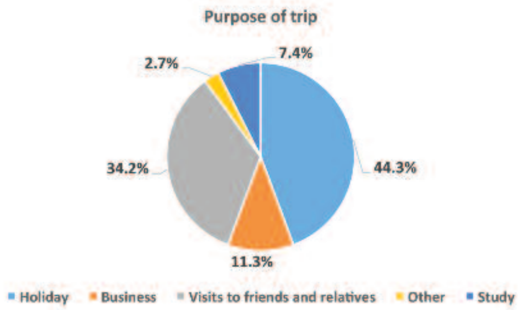



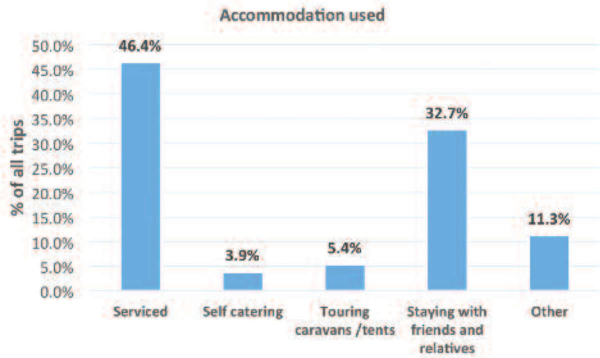




## DORSET – 2014 OVERSEAS STAYING VISITOR DATA

| Trips | Nights | Spend |
|---|---|---|
| 336,000 | 3,069,000 | £182,759,000 |

| Purpose of trip | Average nights per trip | Average spend per trip | Average spend per night |
|---|---|---|---|
| Holiday | 5.84 | £410.06 | £70.23 |
| Business | 6.92 | £598.97 | £86.54 |
| Visits to friends and relatives | 9.13 | £389.88 | £42.70 |
| Other | 26.22 | £1,635.33 | £62.36 |
| Study | 26.00 | £1,573.80 | £60.53 |
| **All trips** | **9.13** | **£543.93** | **£59.55** |

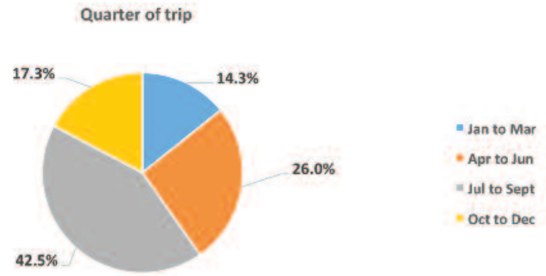


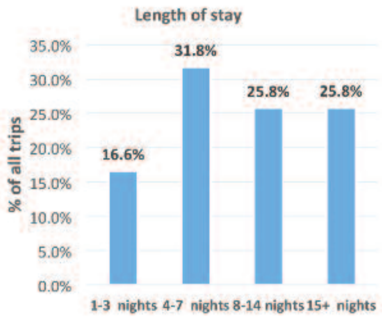



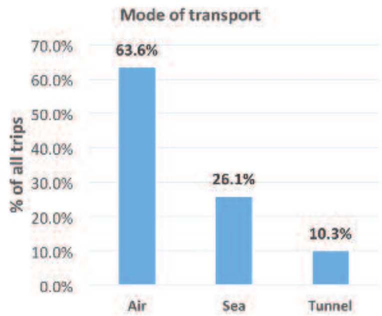

| Business turnover supported | Employment supported (Full time equivalent) | Employment supported (Estimated actual) |
|---|---|---|
| £285,029,000 | 4,100 | 5,500 |

## DORSET OVERSEAS STAYING VISITOR DATA (2012 – 2014 AVERAGES)

| Rank | Market of origin | % of all trips |
|---|---|---|
| 1 | Germany | 18.7% |
| 2 | France | 10.2% |
| 3 | Spain | 7.7% |
| 4 | USA | 6.7% |
| 5 | Netherlands | 6.0% |
| 6 | Australia | 5.2% |
| 7 | Italy | 4.2% |
| 8 | Irish Republic | 4.1% |
| 9 | Poland | 3.8% |
| 10 | Switzerland | 3.1% |
| 11 | Denmark | 2.5% |
| 13 | Norway | 2.1% |
| 16 | New Zealand | 1.3% |
| 17 | Austria | 1.2% |
| 20 | Sweden | 1.1% |

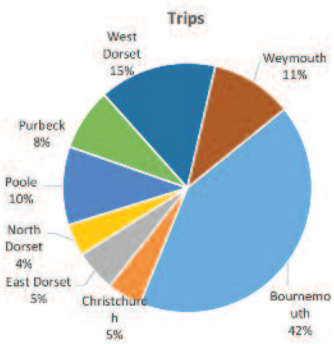


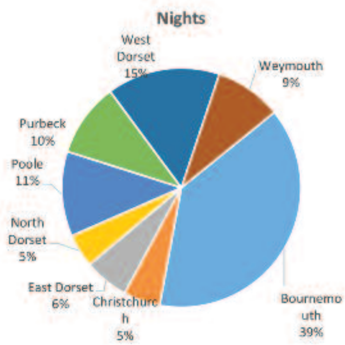



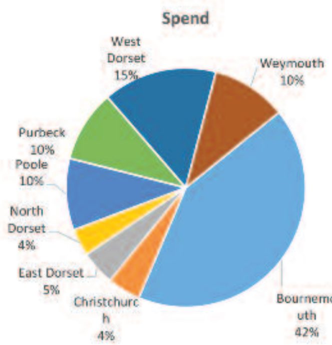




## DORSET - 2014 DISTRICT LEVEL OVERSEAS STAYING VISITOR DATA

| Area | Trips | Nights | Spend |
|---|---|---|---|
| Bournemouth | 141,000 | 1,189,000 | £77,209,000 |
| Christchurch | 15,000 | 152,000 | £8,190,000 |
| East Dorset | 18,000 | 185,000 | £8,541,000 |
| North Dorset | 14,000 | 139,000 | £6,734,000 |
| Poole | 34,000 | 352,000 | £17,706,000 |
| Purbeck | 27,000 | 306,000 | £17,754,000 |
| West Dorset | 51,100 | 469,200 | £28,156,000 |
| Weymouth | 35,400 | 276,800 | £18,467,000 |



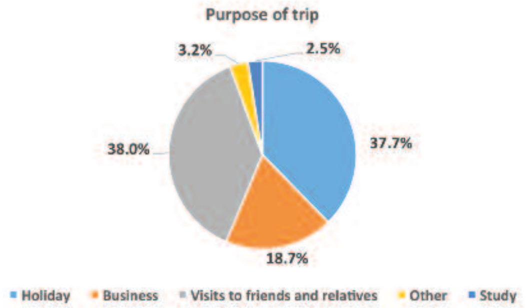



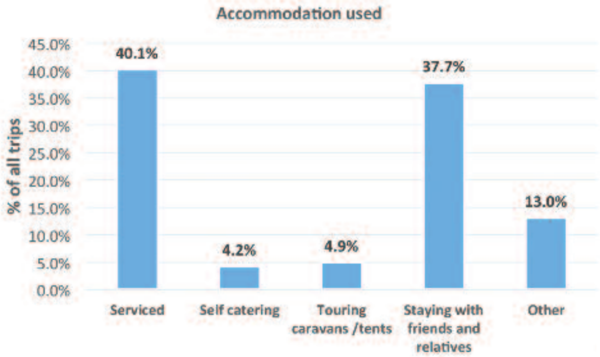



## GLOUCESTERSHIRE – 2014 OVERSEAS STAYING VISITOR DATA

| Trips | Nights | Spend |
|---|---|---|
| 284,000 | 1,775,000 | £116,198,000 |

| Purpose of trip | Average nights per trip | Average spend per trip | Average spend per night |
|---|---|---|---|
| Holiday | 4.15 | £351.80 | £84.78 |
| Business | 3.36 | £364.75 | £108.61 |
| Visits to friends and relatives | 7.91 | £358.62 | £45.35 |
| Other | 5.44 | £690.44 | £126.82 |
| Study | 35.71 | £2,039.71 | £57.11 |
| **All trips** | **6.25** | **£409.15** | **£65.46** |

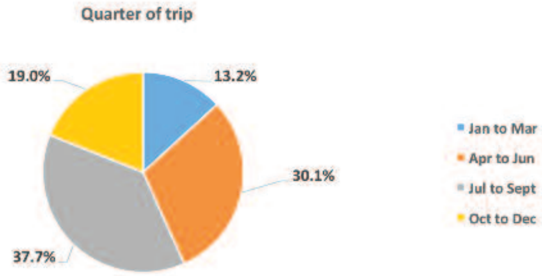


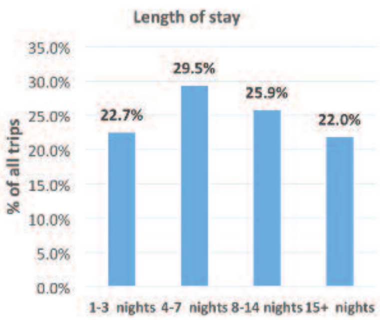



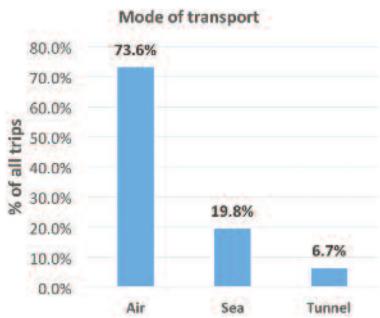

| Business turnover supported | Employment supported (Full time equivalent) | Employment supported (Estimated actual) |
|---|---|---|
| £184,503,000 | 2,600 | 3,400 |

## GLOUCESTERSHIRE OVERSEAS STAYING VISITOR DATA (2012 – 2014 AVERAGES)

| Rank | Market of origin | % of all trips |
|---|---|---|
| 1 | USA | 14.6% |
| 2 | Germany | 10.6% |
| 3 | Irish Republic | 9.8% |
| 4 | France | 9.7% |
| 5 | Netherlands | 7.8% |
| 6 | Australia | 7.5% |
| 7 | Spain | 4.8% |
| 8 | Canada | 3.5% |
| 9 | Poland | 3.0% |
| 10 | Italy | 2.7% |
| 12 | Norway | 1.8% |
| 14 | Switzerland | 1.5% |
| 15 | Sweden | 1.4% |
| 20 | New Zealand | 1.0% |
| 21 | Denmark | 0.9% |
| 27 | Austria | 0.5% |

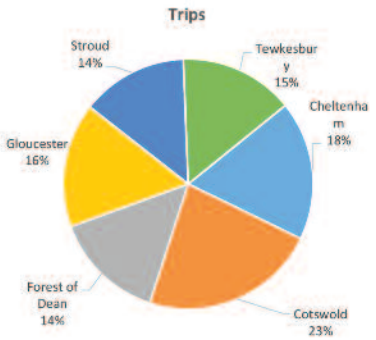


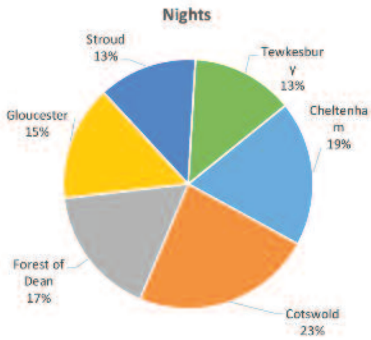



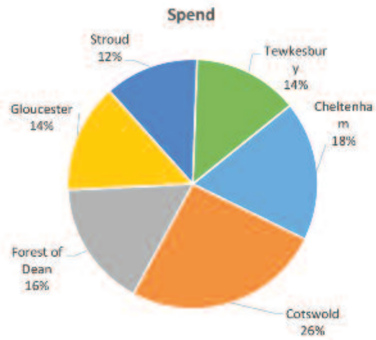



## GLOUCESTERSHIRE - 2014 DISTRICT LEVEL OVERSEAS STAYING VISITOR DATA

| Area | Trips | Nights | Spend |
|---|---|---|---|
| Cheltenham | 51,200 | 334,000 | £21,050,000 |
| Cotswold | 64,700 | 414,000 | £29,730,000 |
| Forest of Dean | 41,100 | 299,000 | £18,998,000 |
| Gloucester | 45,800 | 266,000 | £16,475,000 |
| Stroud | 39,200 | 227,000 | £14,121,000 |
| Tewkesbury | 42,000 | 235,000 | £15,824,000 |
| Cotswold marketing area (all areas except Forest of Dean) | 242,900 | 1,476,000 | £97,200,000 |



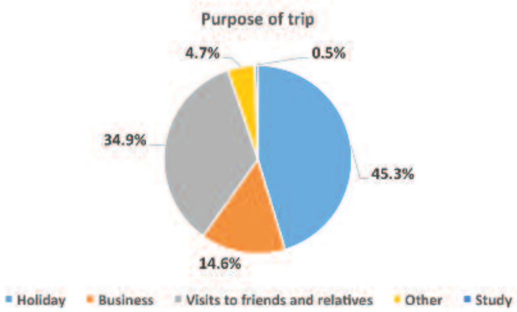



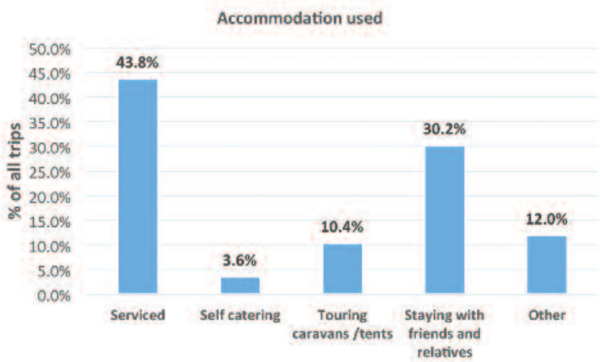




## SOMERSET – 2014 OVERSEAS STAYING VISITOR DATA

| Trips | Nights | Spend |
|---|---|---|
| **192,000** | **1,347,000** | **£66,175,000** |

| Purpose of trip | Average nights per trip | Average spend per trip | Average spend per night |
|---|---|---|---|
| Holiday | 5.55 | £349.94 | £63.03 |
| Business | 3.64 | £395.32 | £108.52 |
| Visits to friends and relatives | 10.06 | £238.94 | £23.75 |
| Other | 3.56 | £547.00 | £153.84 |
| Study | 56.00 | £3,729.00 | £66.59 |
| **All trips** | **7.02** | **£344.66** | **£49.13** |

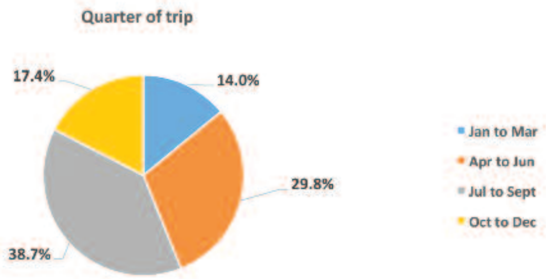


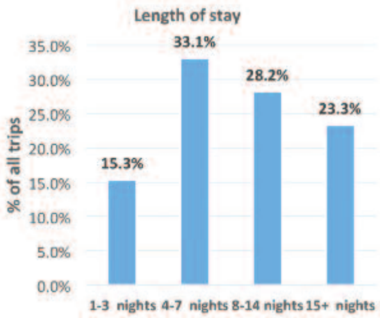



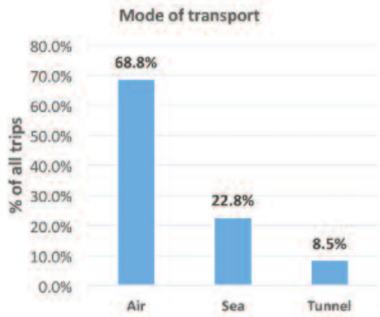

| Business turnover supported | Employment supported (Full time equivalent) | Employment supported (Estimated actual) |
|---|---|---|
| **£105,563,000** | **1,500** | **2,000** |

## SOMERSET OVERSEAS STAYING VISITOR DATA (2012 – 2014 AVERAGES)

| Rank | Market of origin | % of all trips |
|---|---|---|
| 1 | USA | 12.7% |
| 2 | Germany | 12.0% |
| 3 | France | 11.9% |
| 4 | Australia | 8.9% |
| 5 | Spain | 6.6% |
| 6 | Netherlands | 6.0% |
| 7 | Irish Republic | 5.9% |
| 8 | Italy | 4.0% |
| 9 | Belgium | 2.8% |
| 10 | Poland | 2.7% |
| 12 | Switzerland | 2.2% |
| 13 | New Zealand | 1.7% |
| 14 | Denmark | 1.5% |
| 16 | Norway | 1.2% |
| 17 | Sweden | 1.1% |
| 32 | Austria | 0.4% |

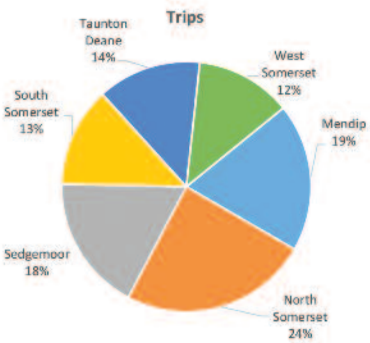


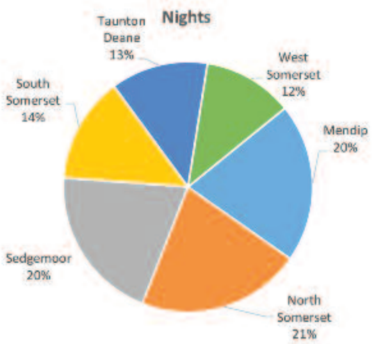



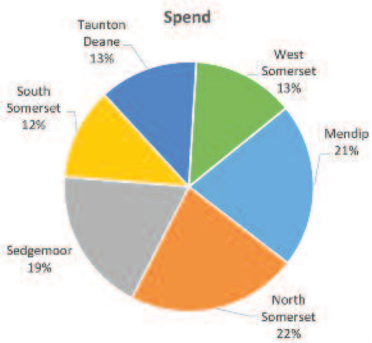




## SOMERSET - 2014 DISTRICT LEVEL OVERSEAS STAYING VISITOR DATA

| Area | Trips | Nights | Spend |
|---|---|---|---|
| Mendip | 37,000 | 277,000 | £14,099,000 |
| North Somerset | 47,000 | 286,000 | £14,598,000 |
| Sedgemoor | 34,000 | 272,000 | £12,379,000 |
| South Somerset | 25,000 | 185,000 | £7,889,000 |
| Taunton Deane | 26,000 | 170,000 | £8,472,000 |
| West Somerset | 24,000 | 157,000 | £8,737,000 |



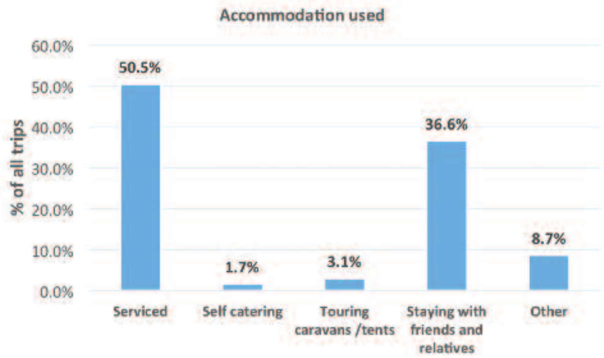



## WILTSHIRE – 2014 OVERSEAS STAYING VISITOR DATA

| Trips | Nights | Spend |
|---|---|---|
| 287,000 | 1,754,000 | £97,310,000 |

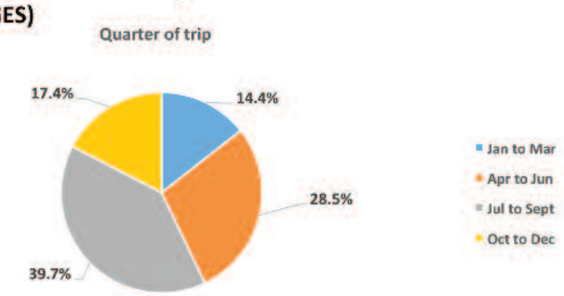
| Purpose of trip | Average nights per trip | Average spend per trip | Average spend per night |
|---|---|---|---|
| Holiday | 4.18 | £302.12 | £72.19 |
| Business | 3.41 | £317.44 | £93.10 |
| Visits to friends and relatives | 8.02 | £309.84 | £38.65 |
| Other | 5.60 | £596.50 | £106.52 |
| Study | 36.00 | £1,751.25 | £48.65 |
| **All trips** | **6.11** | **£339.06** | **£55.48** |

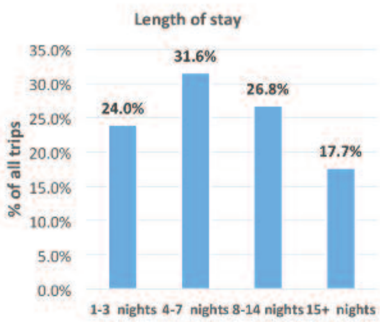



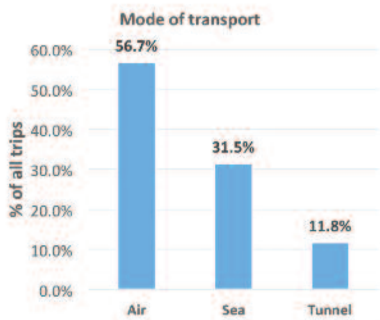

| Business turnover supported | Employment supported (Full time equivalent) | Employment supported (Estimated actual) |
|---|---|---|
| £158,065,400 | 2,350 | 3,100 |

## WILTSHIRE OVERSEAS STAYING VISITOR DATA (2012 – 2014 AVERAGES)

| Rank | Market of origin | % of all trips |
|---|---|---|
| 1 | Germany | 13.1% |
| 2 | France | 11.0% |
| 3 | Netherlands | 8.4% |
| 4 | USA | 8.3% |
| 5 | Australia | 6.6% |
| 6 | Irish Republic | 5.3% |
| 7 | Poland | 4.7% |
| 8 | Italy | 4.1% |
| 9 | Spain | 3.9% |
| 10 | Belgium | 3.0% |
| 12 | Switzerland | 2.6% |
| 14 | Sweden | 2.0% |
| 16 | Denmark | 1.5% |
| 17 | New Zealand | 1.4% |
| 18 | Norway | 1.4% |
| 23 | Austria | 0.8% |

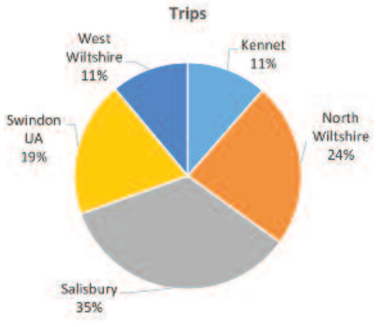


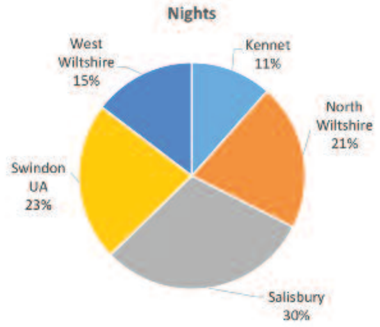



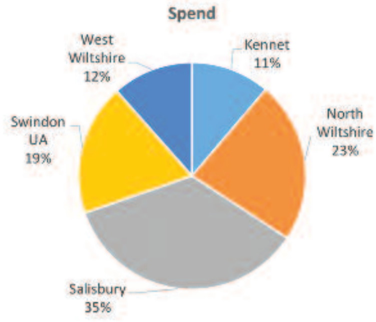



## WILTSHIRE - 2014 DISTRICT LEVEL OVERSEAS STAYING VISITOR DATA

| Area (former local authorities) | Trips | Nights | Spend |
|---|---|---|---|
| Kennet | 33,000 | 203,000 | £10,921,000 |
| North Wiltshire | 68,000 | 366,000 | £22,378,000 |
| Salisbury | 100,000 | 532,000 | £34,520,000 |
| Swindon UA | 56,000 | 396,000 | £18,255,000 |
| West Wiltshire | 32,000 | 257,000 | £11,236,000 |




SOUTH WEST ENGLAND IS GREAT BRITAIN