Appendix 8: International Passenger Survey by the ONS, September 2022

Monthly Inbound Update

September 2022

International Passenger Survey by the ONS

(published 3rd February 2023)

Contents

1. Latest monthly inbound UK

September 2022

VISIT BRITAIN

Summary

- **Visits:** Visits in September 2022 reached 3.0 million, down 10% on September 2019. Visits dipped slightly compared to August 2022 but this follows patterns from pre-COVID 19 with a natural dip after the peak summer period. Between January and September 2022, the UK welcomed 21.2 million inbound visitors.
- **Spend:** Spend was up 1% on September 2019 with inbound visitors spending £2.6m in September 2022. Similar to visits, spend dipped slightly from August, which is a typical pre-COVID 19 pattern. In the 9 months to September 2022, inbound visitors spent £18.4bn (in nominal terms) whilst in the UK.
- **Journey Purpose:**
  - → **Holiday** visits have continued to grow in each month of 2022 through to August but dipped in September 2022 to 1.1 million visits. Holidays accounted for 39% of all inbound visits. From Jan-Sep 2022, there were 8.3 million holiday visits to the UK.
  - → There were 1.0 million inbound visits to **friends and relatives** in September 2022, a new record for this month. Overall, VFR visits accounted for 35% of all inbound visits in September. From Jan-Sep 2022 there have been 7.9 million VFR visits to the UK.
  - → **Business** was the only journey purpose to see a rise in visits from August to September with 566 million business visits in September 2022. From Jan-Sep 2022, there were 3.4 million business visits to the UK, accounting for 16% of all inbound visits.
  - → All other visits, under '**miscellaneous**', which includes study, contributed 1.5 million visits in the 9 months to September 2022.
- **Global Regions:**
  - → **Europe** made up 65% of all inbound visits in the first 9 months of 2022, equating to 13.7 million visits, with a small dip in June and September. EU15 markets remain an important source of markets for inbound visits and accounted for half of all UK visits (48%) from Jan-Sep 2022.
  - → From Jan-Sep 2022, there were 4.1 million visits from **North America**. Despite visits falling in August and September from the peak in July, both months reported the highest visits on record at 717,000 and 648,000 visits respectively.
  - → There were 480,000 visits from the **Rest of the World** in September 2022. Overall in the 9 months to September 2022 there were 3.4 million visits to the UK from this region – accounting for 16% of all inbound visits.

International Passenger Survey by the ONS 2022. Jan-Jun excludes those travelling via Eurotunnel - please see notes on slide 28 for further info.
All values and percentage changes in spend are in nominal terms.

Monthly 2022 Headlines

Total	January 2022	February 2022	March 2022	April 2022	May 2022	June 2022	July 2022	August 2022	September 2022	Year-to-date (Jan-Sep 2022)
Visits (000)	801	995	1,773	2,161	2,621	2,865	3,444	3,544	2,956	21,160
Spend (£m)	£672	£754	£1,305	£1,812	£2,169	£2,680	£3,252	£3,169	£2,631	£18,440

- **Visits:** Whilst UK inbound visits increased month-on-month in the 8 months to August, visits in September dipped slightly to 3.0 million visits. This follows patterns from pre-COVID-19 with a natural dip after the peak summer period. Between January and September 2022, the UK welcomed 21.2 million inbound visitors.

- **Spend:** In the 9 months to September 2022, inbound visitors spent £18.4bn (in nominal terms) whilst in the UK. Similar to visits, spend dipped slightly in September to £2.6m which is a typical pre-COVID-19 pattern.

International Passenger Survey by the ONS 2022. Jan-Jun excludes those travelling via Eurotunnel - please see notes on slide 28 for further info.
All values and percentage changes in spend are in nominal terms.

Monthly Journey Purpose – Visits (000)

Total Visits (000)	January 2022	February 2022	March 2022	April 2022	May 2022	June 2022	July 2022	August 2022	September 2022	Year-to-date (Jan-Sep 2022)
Holiday	99	253	559	807	1,079	1,242	1,487	1,668	1,148	8,340
VFR	501	442	709	837	963	996	1,161	1,274	1,033	7,920
Business	153	227	382	350	414	450	524	359	566	3,420
Miscellaneous	49	72	123	167	164	178	272	243	209	1,480

- **Holiday** visits have continued to grow in each month of 2022 through to August but dipped in September 2022 to 1.1 million visits. Holidays have been the main reason inbound visitors have visited the UK since May 2022 and this continued into September where they accounted for 39% of all inbound visits. From Jan-Sep 2022, there were 8.3 million holiday visits to the UK.
- There were 1.0 million inbound visits to **friends and relatives** in September 2022, a new record for this month. Overall, VFR visits accounted for 35% of all inbound visits in September (a similar share since May 2022). In 2022 so far (Jan-Sep), there have been 7.9 million visits to friends and relatives in the UK.
- **Business** was the only journey purpose to see a rise in visits from August to September with 566 million business visits in September 2022. From Jan-Sep 2022, there were 3.4 million business visits to the UK, accounting for 16% of all inbound visits.
- All other visits, under '**miscellaneous**', which includes study, contributed 1.5 million visits in the 9 months to September 2022 (7% of all inbound visits).

International Passenger Survey by the ONS 2022. Jan-Jun excludes those travelling via Eurotunnel - please see notes on slide 28 for further info.
All values and percentage changes in spend are in nominal terms.

Monthly Global Region – Visits (000)

Total Visits (000)	January 2022	February 2022	March 2022	April 2022	May 2022	June 2022	July 2022	August 2022	September 2022	Year-to-date (Jan-Sep 2022)
Total Europe	551	777	1,333	1,559	1,743	1,648	2,050	2,200	1,828	13,690
→ EU	488	714	1,210	1,385	1,584	1,492	1,802	2,023	1,640	12,340
→ EU15	353	565	973	1,178	1,288	1,250	1,481	1,721	1,331	10,140
→ Other EU	133	150	239	211	291	243	320	305	307	2,200
→ Rest of Europe	65	62	122	170	165	154	250	173	190	1,350
North America	86	98	227	328	494	719	794	717	648	4,110
Rest of World	164	120	213	274	383	498	600	627	480	3,360

- **Europe** made up 65% of all inbound visits in the first 9 months of 2022, equating to 13.7 million visits, with a small dip in June and September. EU15 markets remain an important source of markets for inbound visits and accounted for half of all UK visits (48%) from Jan-Sep 2022.
- From Jan-Sep 2022, there were 4.1 million visits from **North America**. Despite visits falling in August and September from the peak in July, both months reported the highest visits on record at 717,000 and 648,000 visits respectively.
- There were 480,000 visits from the **Rest of the World** in September 2022. Overall in the 9 months to September 2022 there were 3.4 million visits to the UK from this region – accounting for 16% of all inbound visits.

International Passenger Survey by the ONS 2022. Jan-Jun excludes those travelling via Eurotunnel - please see notes on slide 28 for further info.
All values and percentage changes in spend are in nominal terms.

2. 2019 Comparisons

Latest 3 months and Year to Date

2019 Comparisons - Visit (000) and Spend (£m)

Total Visits (000)	2022	Change vs. 2019^
September	2,956	*-10%*
Last 3 months (July-September)	9,940	*-16%*
Year to date (January-September)	21,160	*-28%*

Total Spend (£m)	2022	Change vs. 2019^
September	£2,631	*1%*
Last 3 months (July-September)	£9,050	*-2%*
Year to date (January-September)	£18,440	*-10%*

- In September 2022, there were 3.0 million inbound visits to the UK, down 10% on the same month in 2019. These visitors spent £2.6bn across the UK, 1% up on September 2019 (in nominal terms).
- Across the medium term period of Jul-Sep (Q3 2022), the UK welcomed 9.9 million visitors, down 16% on the same period in 2019. During these 3 months, inbound visitors spent £9.1bn, just shy of pre-pandemic spend in Jul-Sep 2019 (-2%).
- In the 9 months to September 2022, visits reached 21.2 million (72% of 2019 levels) whilst spend was shown to have recovered at a faster rate to £18.4bn (90% of 2019 levels)
- Overall the average spend per visit in 2022 (January to September) was £872 vs £696 for the same period of 2019. The 2022 average spend is 25% higher – in part due to a longer average length of stay seen in the first 6 months of 2022 as well as inflation.

International Passenger Survey by the ONS 2022. Jan-Jun 2022 and 2019 excludes those travelling via Eurotunnel - please see notes on slide 28 for further info. ^Data from 2019 includes Irish land border data. Irish land border data is excluded from 2021 onwards. All values and percentage changes in spend are in nominal terms.

2019 Comparisons - Journey Purpose – Visits (000)

Total Visits (000)	September 2022	Change vs. 2019^	Last 3 months (Jul-Sep)	Change vs. 2019^
Holiday	1,148	*-10%*	4,300	*-20%*
VFR	1,033	*12%*	3,470	*1%*
Business	566	*-35%*	1,450	*-33%*
Miscellaneous	209	*-5%*	720	*-21%*

- Across the short and medium term measures above, **holiday** visits remain behind the levels reported in the same period pre-pandemic, in 2019.
- **Visiting friends and relatives** is the only journey purpose that is reporting higher results in September and Q3 2022 vs 2019. Visits in September were 12% higher compared to 2019 (a September VFR record), whilst Q3 visits were 1% higher than 2019.
- Although **business** visits peaked in September, they have been the slowest to recover, still 35% behind 2019 levels in September 2022. A similar picture was seen for Q3 2022 vs Q3 2019 as well.
- **Miscellaneous** visits tend to be a smaller proportion of all inbound UK visits and results can fluctuate. Compared to 2019 levels these visits remain below pre pandemic levels across the short and medium terms measures presented here.

International Passenger Survey by the ONS 2022. ^Data from 2019 includes Irish land border data. Irish land border data is excluded from 2021 onwards. All values and percentage changes in spend are in nominal terms.

2019 Comparisons - Global Region – Visits (000)

Total Visits (000)	September 2022	Change vs. 2019^	Last 3 months (Jul-Sep)	Change vs. 2019^
Total Europe	1,828	*-8%*	6,080	*-15%*
→ EU	1,640	*-10%*	5,470	*-16%*
→ EU15	1,331	*-12%*	4,530	*-16%*
→ Other EU	307	*-4%*	930	*-17%*
→ Rest of Europe	190	*10%*	610	*-5%*
North America	648	*42%*	2,160	*24%*
Rest of World	480	*-43%*	1,710	*-42%*

- In September 2022, visits from **Europe** continued to grow closer to pre-pandemic levels, reaching 1.8 million visits (8% below September 2019). Visits for the Jul-Sep 2022 were 15% below 2019 levels, reporting 6.1 million visits.
- Visits from **North America** surpassed 2019 levels in the 3 months to September 2022 at 2.2 million visits (up 24% on Jul-Sep 2019).
- 2022 **Rest of World** visits remain just above half of the levels reported in the comparable measures in 2019.

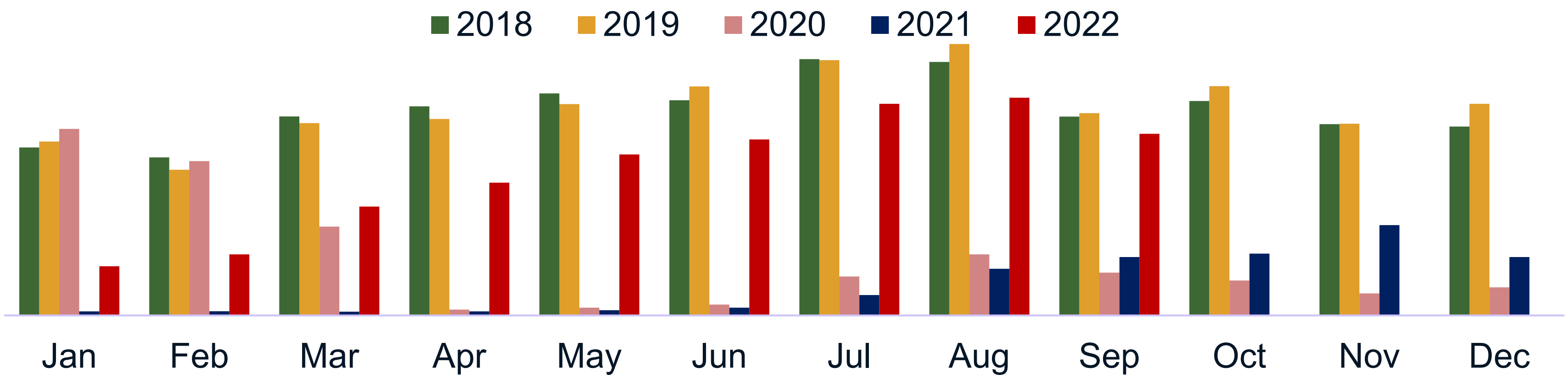
International Passenger Survey by the ONS 2022. ^Data from 2019 includes Irish land border data. Irish land border data is excluded from 2021 onwards.
All values and percentage changes in spend are in nominal terms.

3. Detailed monthly trends

Detailed monthly trends - visits

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - Total Visits (000)
Source: Office for National Statistics, International Passenger Survey



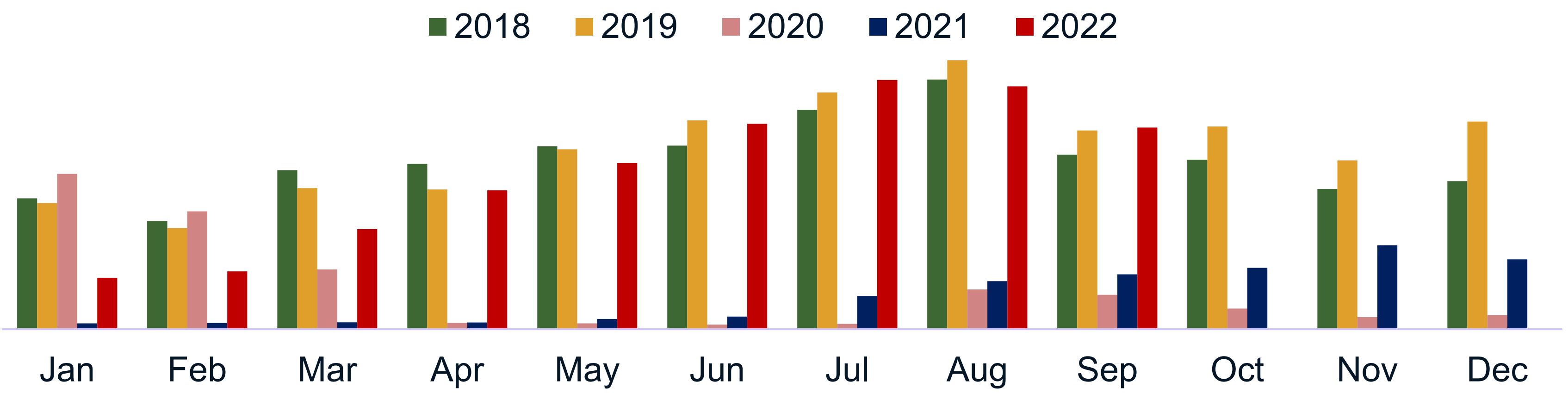
Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	2,734	2,573	3,240	3,404	3,614	3,503	4,172	4,126	3,237	3,491	3,112	3,075
2019	2,830	2,372	3,129	3,199	3,438	3,727	4,155	4,418	3,292	3,731	3,121	3,445
2020	3,036	2,512	1,446	95	127	176	633	993	696	570	358	458
2021	65	69	61	65	86	126	331	759	949	1,006	1,470	951
2022	801	995	1,773	2,161	2,621	2,865	3,444	3,544	2,956			

***Note:** Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*
Long term trends showing percentage change year-on-year by quarter and more is available here.

Detailed monthly trends - spend

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - Total Spend (£m)
Source: Office for National Statistics, International Passenger Survey

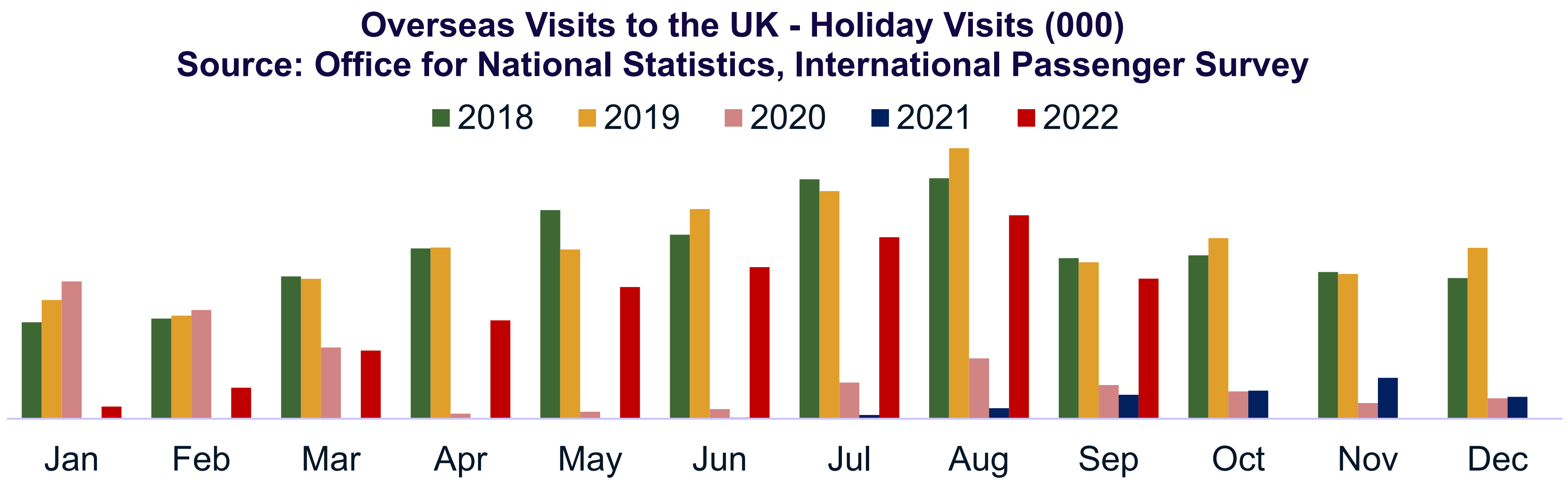


Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	1,708	1,412	2,074	2,157	2,385	2,396	2,864	3,259	2,278	2,212	1,830	1,931
2019	1,646	1,318	1,840	1,824	2,347	2,725	3,090	3,510	2,593	2,645	2,201	2,708
2020	2,026	1,538	780	82	75	61	69	519	448	270	156	185
2021	76	82	89	87	134	165	433	626	716	801	1,095	910
2022	672	754	1,305	1,812	2,169	2,680	3,252	3,169	2,631			

Note: *Spending in million pounds. Monthly data is replaced by the more accurate Quarterly data.*
Long term trends showing percentage change year-on-year by quarter and more is available here.

Detailed monthly trends – journey purpose - holiday

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data



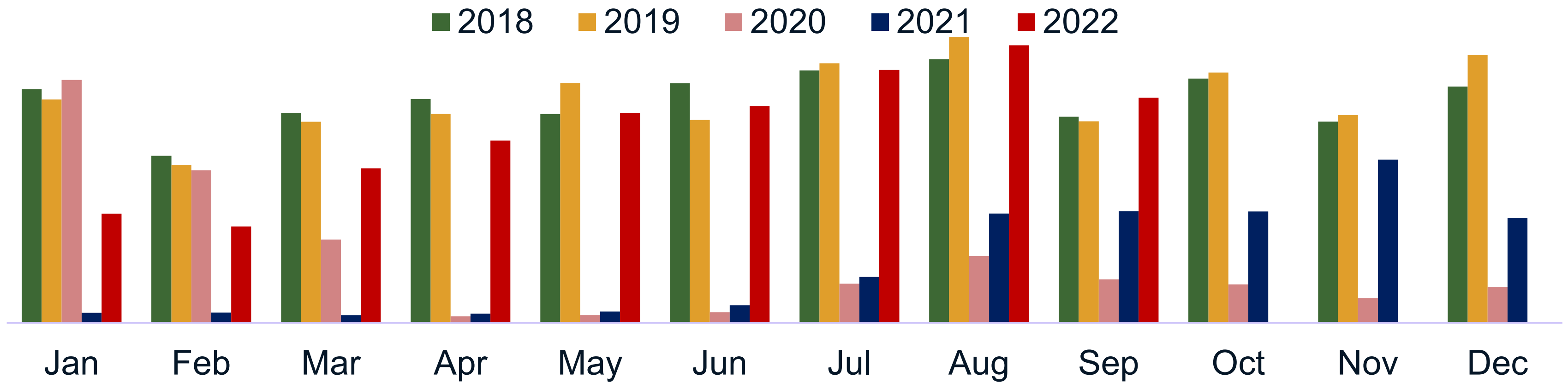
Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	790	820	1,167	1,396	1,710	1,508	1,962	1,971	1,317	1,339	1,202	1,153
2019	973	844	1,147	1,403	1,388	1,718	1,866	2,217	1,282	1,480	1,187	1,401
2020	1,125	891	584	42	57	79	296	495	275	224	128	167
2021	1	3	3	2	3	8	30	86	196	230	335	179
2022	99	253	559	807	1,079	1,242	1,487	1,668	1,148			

Note: *Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*
Long term trends showing percentage change year-on-year by quarter and more is available here.

Detailed monthly trends – journey purpose - VFR

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - VFR Visits (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	1,073	766	964	1,028	959	1,099	1,159	1,210	946	1,122	924	1,085
2019	1,025	724	923	960	1,101	932	1,192	1,313	925	1,149	954	1,230
2020	1,115	700	382	29	35	48	180	307	199	176	113	165
2021	46	47	35	41	52	80	211	501	512	511	749	482
2022	501	442	709	837	963	996	1,161	1,274	1,033			

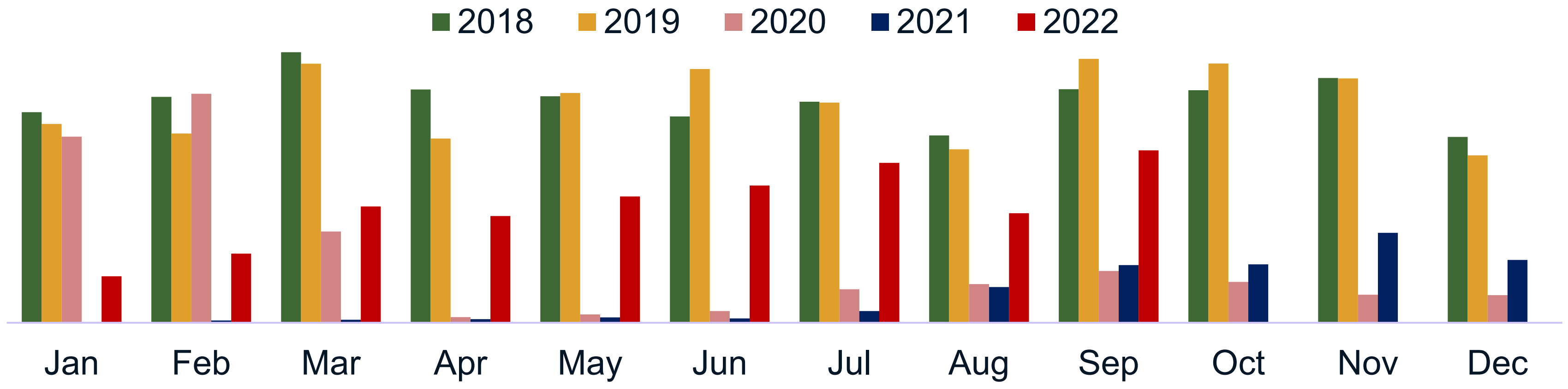
Note: *Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*

Long term trends showing percentage change year-on-year by quarter and more is available here.

Detailed monthly trends – journey purpose - business

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - Business Visits (000)
Source: Office for National Statistics, International Passenger Survey



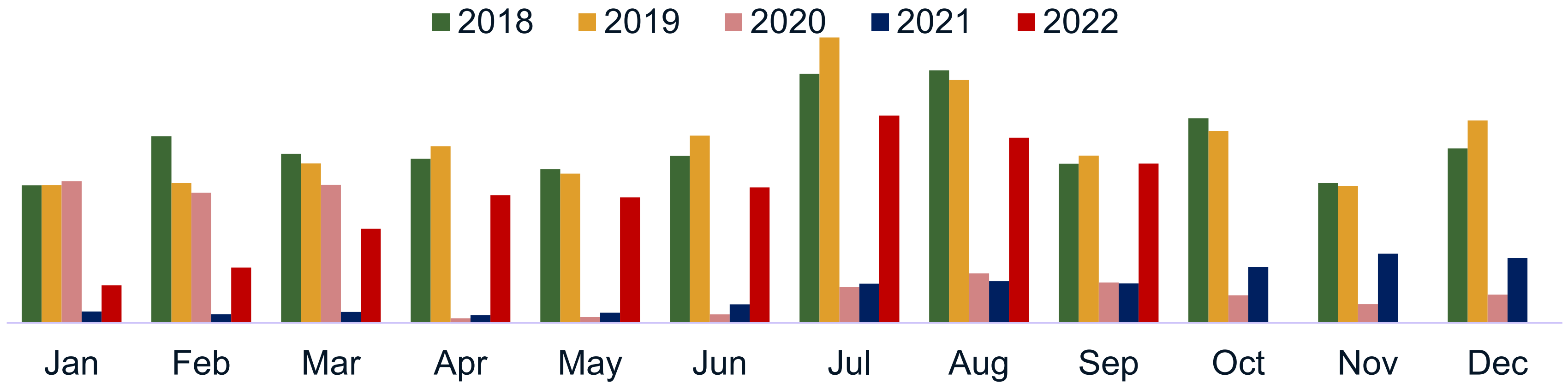
Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	691	741	887	765	743	677	725	614	766	763	803	609
2019	652	621	850	604	754	832	722	569	866	850	801	549
2020	610	751	299	19	27	38	110	127	170	134	92	90
2021	3	7	10	12	18	14	38	117	189	192	295	206
2022	153	227	382	350	414	450	524	359	566			

Note: *Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*
Long term trends showing percentage change year-on-year by quarter and more is available here.

Detailed monthly trends – journey purpose - misc

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - Miscellaneous (includes short-term study, 000)
Source: Office for National Statistics, International Passenger Survey



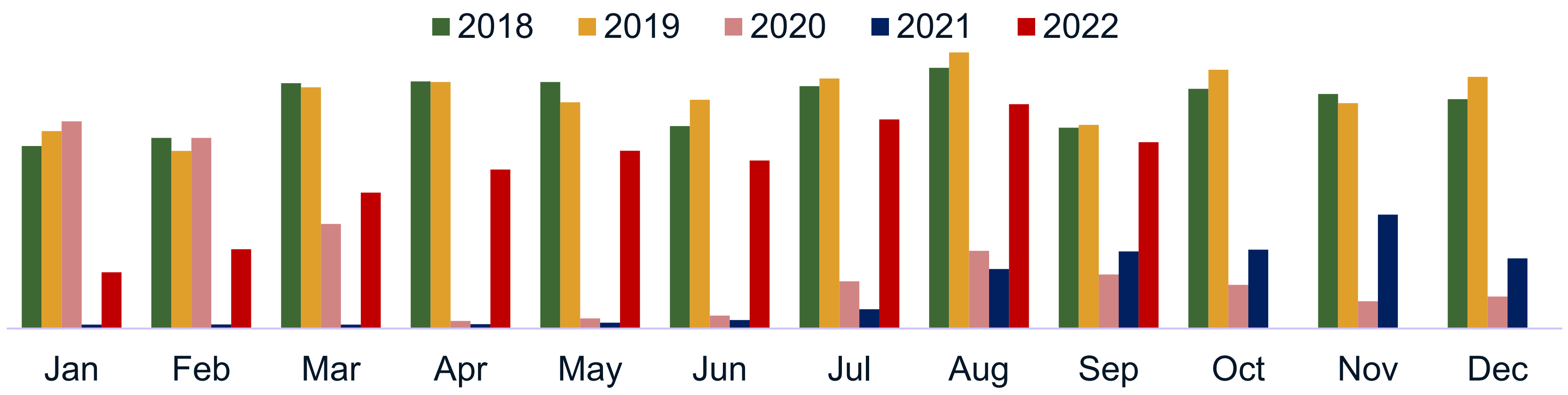
Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	180	245	222	215	202	219	327	331	209	268	183	229
2019	181	183	209	232	196	246	374	318	219	252	179	265
2020	186	170	181	6	7	11	47	65	53	36	24	37
2021	15	11	14	10	13	24	51	54	52	73	91	85
2022	49	72	123	167	164	178	272	243	209			

Note: *Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*
Long term trends showing percentage change year-on-year by quarter and more is available here.

Detailed monthly trends – global regions - Europe

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from Europe (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	1,790	1,870	2,405	2,423	2,417	1,985	2,377	2,557	1,970	2,350	2,300	2,249
2019	1,936	1,742	2,365	2,417	2,219	2,243	2,453	2,707	1,996	2,537	2,209	2,469
2020	2,032	1,869	1,025	74	98	126	463	761	529	429	267	313
2021	38	39	38	43	57	83	189	584	756	773	1,117	688
2022	551	777	1,333	1,559	1,743	1,648	2,050	2,200	1,828			

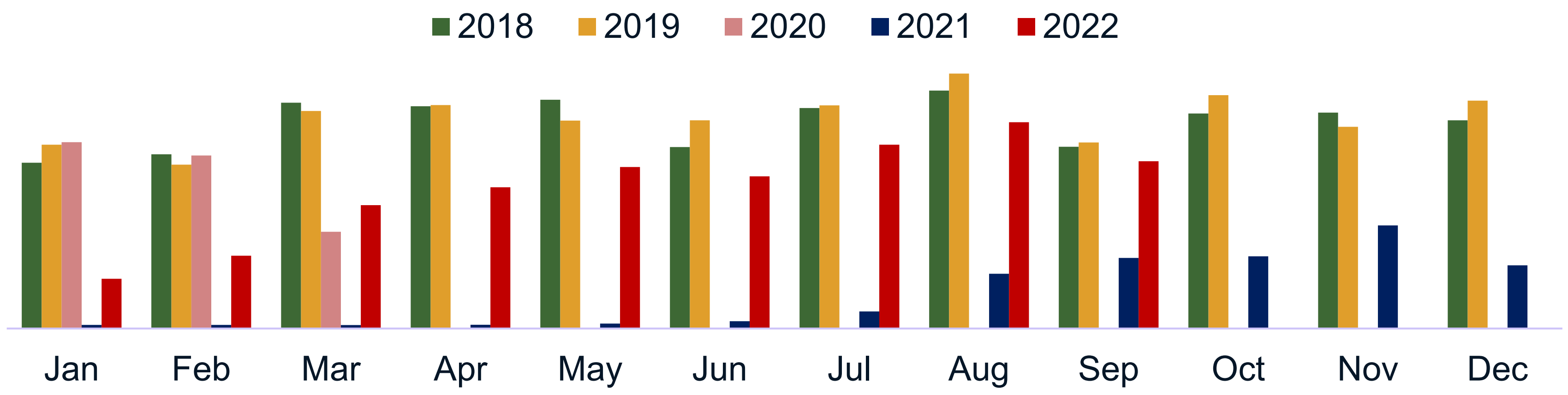
Note: *Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*
Long term trends showing percentage change year-on-year by quarter and more is available here.

International Passenger Survey by the ONS 2022

Detailed monthly trends – global regions - EU

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from EU (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	1,626	1,708	2,215	2,180	2,243	1,779	2,161	2,333	1,782	2,108	2,117	2,041
2019	1,803	1,607	2,133	2,192	2,039	2,041	2,188	2,499	1,825	2,289	1,978	2,235
2020	1,827	1,697	948	-	-	-	-	-	-	-	-	-
2021	35	35	34	37	48	72	167	537	691	708	1,011	620
2022	488	714	1,210	1,385	1,584	1,492	1,802	2,023	1,640			

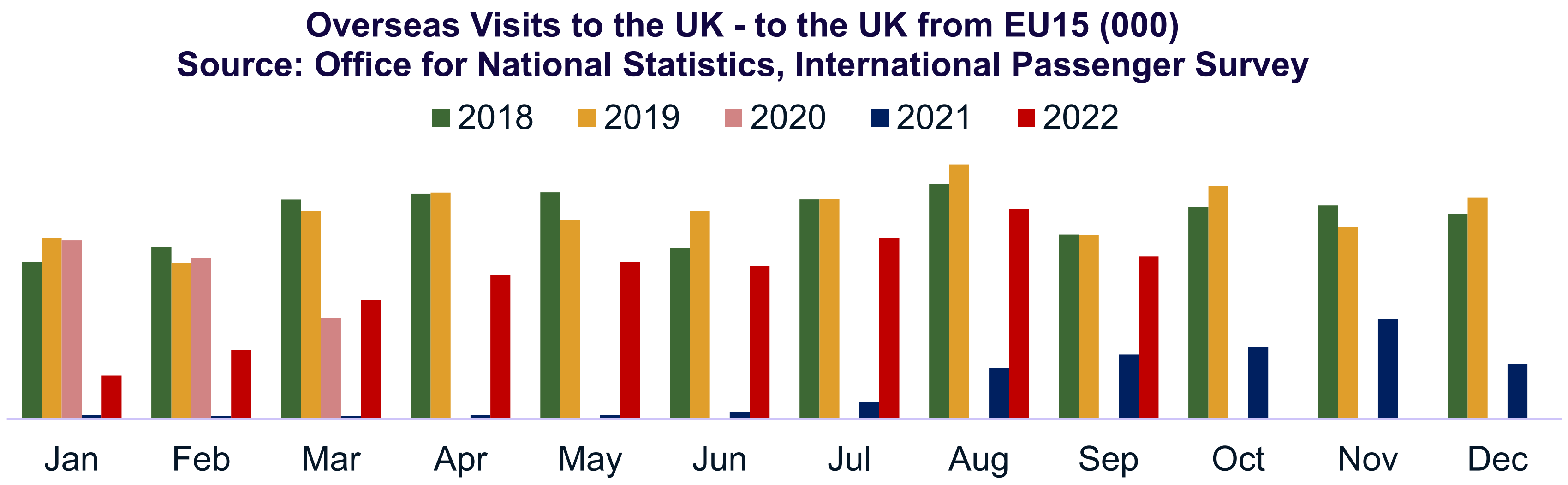
Note: *Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*
Long term trends showing percentage change year-on-year by quarter and more is available here.

International Passenger Survey by the ONS 2022. No data monthly data is available April – December 2020, due to the impact of COVID (see slide 28).

VISIT BRITAIN

Detailed monthly trends – global regions – EU15

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	1,287	1,407	1,796	1,843	1,857	1,401	1,796	1,922	1,508	1,735	1,748	1,679
2019	1,483	1,272	1,701	1,854	1,630	1,703	1,802	2,083	1,505	1,910	1,572	1,814
2020	1,461	1,316	826									
2021	28	21	21	28	33	55	139	412	527	586	817	448
2022	353	565	973	1,178	1,288	1,250	1,481	1,721	1,331			

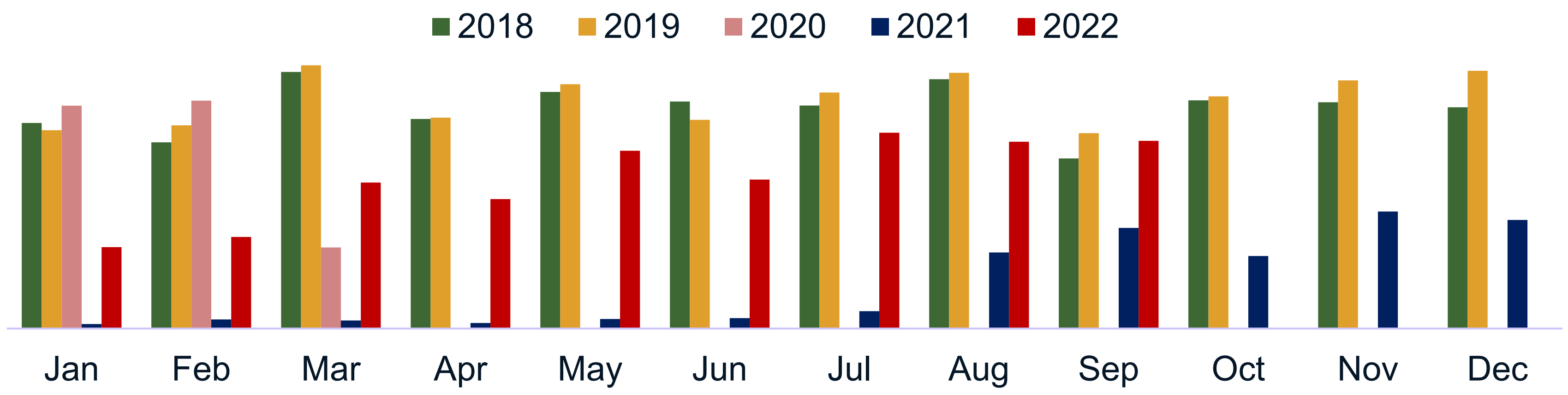
Note: *Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*
Long term trends showing percentage change year-on-year by quarter and more is available here.

International Passenger Survey by the ONS 2022. No data monthly data is available April – December 2020, due to the impact of COVID (see slide 28).

Detailed monthly trends – global regions – EU Other

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from EU Other (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	336	304	419	343	387	371	365	407	278	373	370	362
2019	324	332	430	345	399	341	386	418	319	380	405	421
2020	364	372	132	-	-	-	-	-	-	-	-	-
2021	7	15	13	9	16	17	28	124	164	118	191	177
2022	133	150	239	211	291	243	320	305	307			

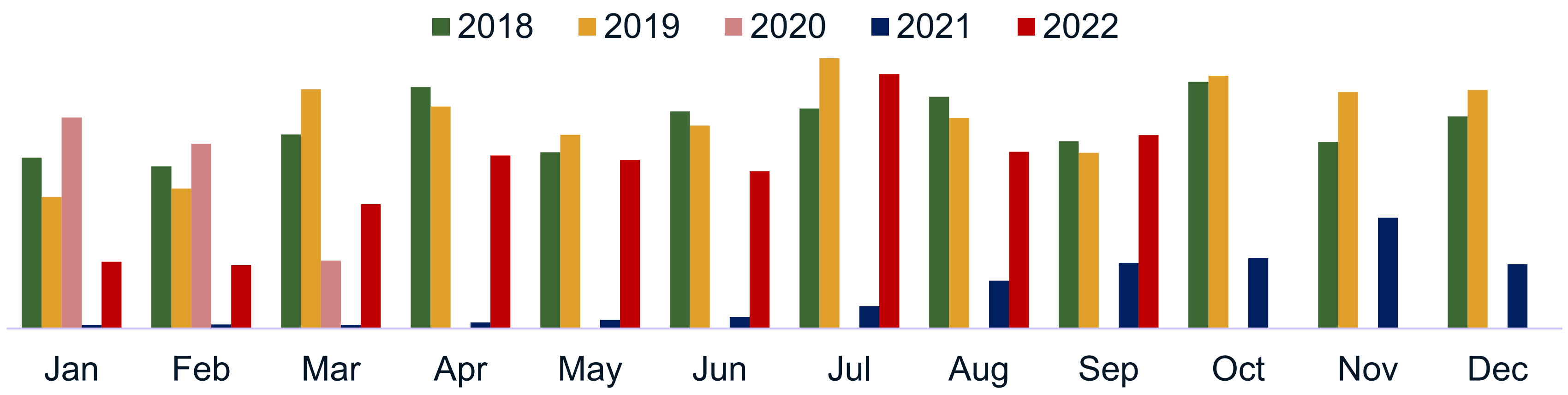
Note: *Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*
Long term trends showing percentage change year-on-year by quarter and more is available here.

International Passenger Survey by the ONS 2022. No data monthly data is available April – December 2020, due to the impact of COVID (see slide 28).

Detailed monthly trends – global regions – Rest of Europe

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from Rest of Europe (000)
Source: Office for National Statistics, International Passenger Survey



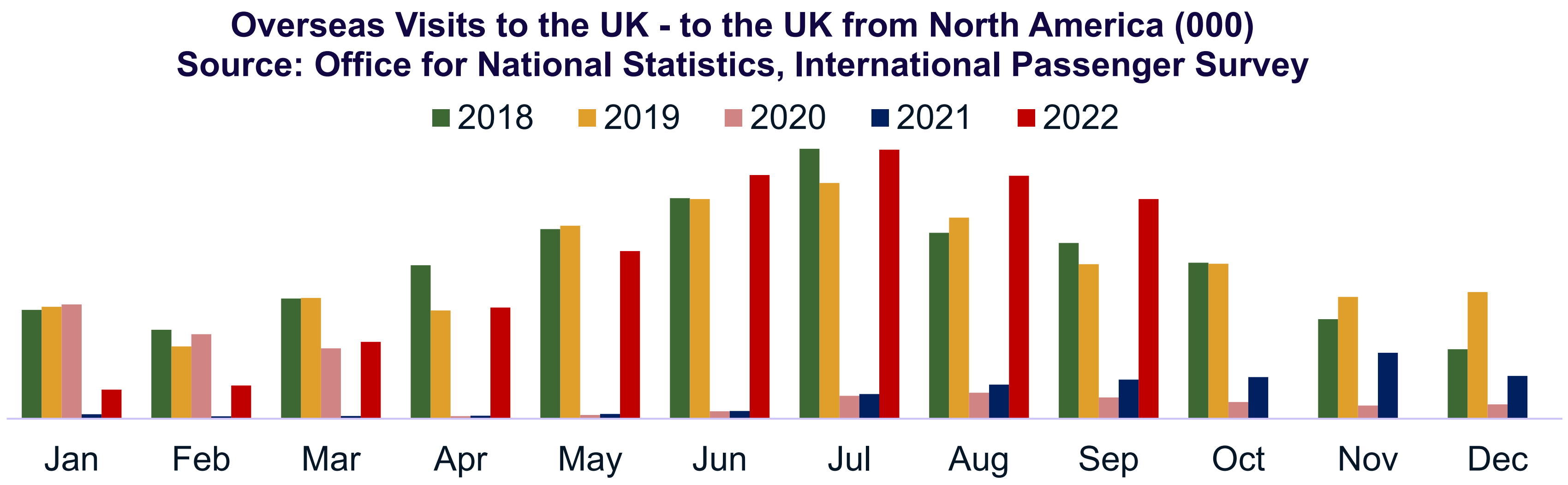
Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	167	159	190	237	173	213	216	227	184	242	183	208
2019	129	137	235	218	190	199	265	206	172	248	232	234
2020	207	181	67	-	-	-	-	-	-	-	-	-
2021	3	4	4	6	8	11	22	47	64	69	109	63
2022	65	62	122	170	165	154	250	173	190			

Note: *Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*
Long term trends showing percentage change year-on-year by quarter and more is available here.

International Passenger Survey by the ONS 2022. No data monthly data is available April – December 2020, due to the impact of COVID (see slide 28).

Detailed monthly trends – global regions – North America

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	321	262	354	453	560	651	797	548	519	460	294	205
2019	330	213	356	319	570	648	696	593	456	457	360	374
2020	337	249	208	7	11	22	67	77	63	49	39	42
2021	13	7	8	9	14	23	73	101	115	123	194	126
2022	86	98	227	328	494	719	794	717	648			

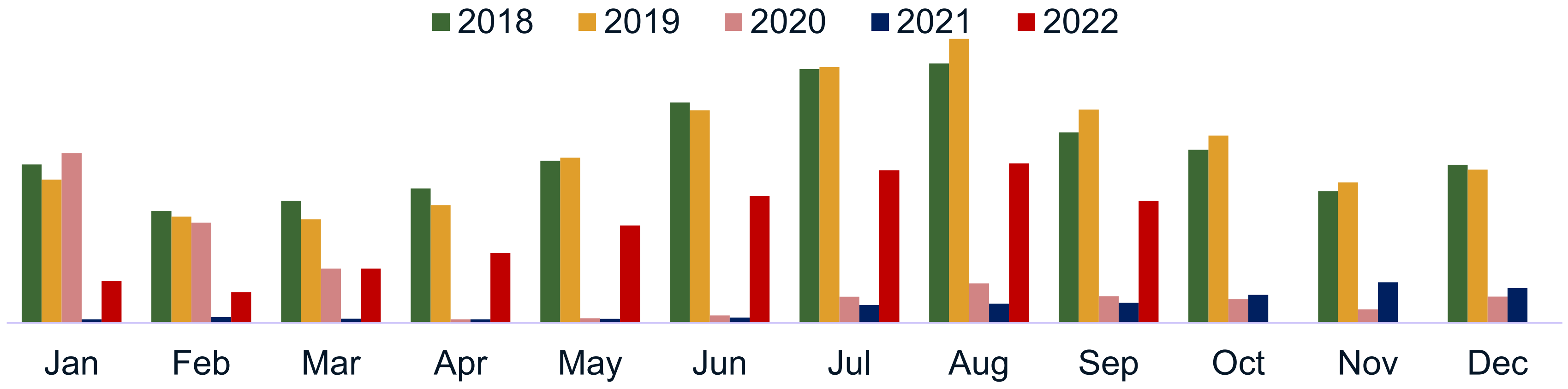
Note: *Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*

Long term trends showing percentage change year-on-year by quarter and more is available here.

Detailed monthly trends – global regions – Rest of World

Please see notes on slide 28 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from Rest of World (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	623	440	480	528	637	867	999	1,021	749	681	518	622
2019	563	418	407	462	650	836	1,006	1,118	840	737	552	602
2020	667	394	213	13	17	29	102	155	105	92	52	103
2021	13	22	16	14	15	20	69	75	78	109	159	137
2022	164	120	213	274	383	498	600	627	480			

Note: *Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.*
Long term trends showing percentage change year-on-year by quarter and more is available here.

4. About this data

About this data

This report is based on the latest International Passenger Survey (IPS) data released by the Office for National Statistics (ONS) on the morning of **31st January 2023**. This data covers provisional September 2022 data but may be revised again for the annual 2022 release in summer 2023. The Q3 2023 data (which includes September) was also released by the ONS on the 31st January 2023. Quarterly data can be more granular than the rounded figures presented in this report. Please note Jan-Aug data has also been revised. Due to the impact of COVID-19 restrictions on the IPS interviews, there are some caveats to the data noted on slide 28.

The IPS data is based on interviews with a sample of departing visitors. The number interviewed varies but is typically around 3,000 per month. Sample sizes at the monthly level for some analysis and comparisons can be low and results should be treated with caution, especially for spending. For absolute clarity we have included sample sizes within this report where breakdowns have been provided.

Please also note:

- All data is sourced from the International Passenger Survey by the Office for National Statistics.
- All figures quoted are not "seasonally adjusted".
- Numbers in some tables / charts may not sum due to rounding.
- All values and percentage changes in spend are in nominal terms (i.e. not taking inflation into account).
- From 2021, data excludes the Irish land border data

Refer to the ONS website for more on IPS methodology and UK outbound travel.

Important notice – impact of COVID-19 on IPS

The International Passenger Survey (IPS) was suspended on 16 March 2020 due to the coronavirus (COVID-19) pandemic. Interviewing initially began at UK airports at the start of 2021, though the IPS remained suspended at some sea ports and train stations during the year. To produce statistics for the periods impacted the Office for National Statistics (ONS) have applied the following processes to the data since March 2020:

- **March 2020 -** With the data collected for most of March when the IPS was running the ONS had part of the data needed for the month. To produce estimates for the full month of March the ONS worked on the assumption that passenger characteristics in the second, unsampled, half of the month were represented by those sampled in the first half.

- **April – December 2020 (Q2, Q3, Q4 2020) -** The travel and tourism figures for this period are based entirely on administrative sources and modelling as no data was collected during this period. In producing these results the ONS have made assumptions that some previous trends have continued, for example, the proportions of passengers travelling for business or holidays. The data was not made available by Mode, therefore we are unable to compare current AIR data to this period in 2020 and have opted to compare AIR data to 2019 instead.

- **2021 –** data published for 2021 should be interpreted with the caveats that no data was collected for those travelling to the UK by Eurotunnel and data for those travelling via Dover was only collected from Q3. In addition, no estimates are included for any travel across the Irish border. Please see our 2021 inbound data page for more information.

- **January to June 2022** – the ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) during this period due to COVID-19 restrictions so data for this timeframe excludes those travelling via Eurotunnel. Eurotunnel data has been excluded from 2019 for Q1 and Q2 in order to make comparisons on slides 9 for year-to-date. The ONS restarted IPS interviews at all ports from July 2022. Please see our 2022 inbound page for more information.

Please refer to the ONS website for the official release and more information on IPS methodology and UK outbound travel

VISIT BRITAIN

Definitions

Regions:

- **Total Europe** includes **EU15** (Austria, Belgium, Denmark, France, Finland, Germany, Greece, Irish Republic, Italy, Luxembourg, Netherlands, Portugal, Spain and Sweden); **Other EU** (Bulgaria, Cyprus (South), Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia (note that Croatia has been included in the 'Other EU' category since it joined in July 2013; before July 2013 this group was labelled as A12) and **Rest of Europe** (European countries outside the EU (including Russia, Norway and Switzerland). Before July 2013 Croatia was also included here, but from July 2013 appears in Other EU)
- **North America** - Canada (including Greenland and St Pierre et Miquelon), USA (including Puerto Rico and US Virgin Islands)
- **Rest of World** – Countries outside Europe and North America (Africa, Asia, Central America, Middle East, Oceania, South America)

Journey purpose:

- **VFR** - Visiting Friends and Relatives
- **Miscellaneous visits** - includes those for short term study, to attend sports events, for personal shopping, health or religious purposes, accompanying others and many more

Other:

- **Visit** - all departing visits from overseas residents (including those who may be UK nationals but live elsewhere, excluding other nationals who have been in the UK for 12 months or longer)
- **Spend** - the amount visitors report spending in the UK during their stay
- **YoY** - Year on Year

Monthly Inbound Update

September 2022

International Passenger Survey by the ONS

(published 3rd February 2023)

Appendix 9: Visit England - All Trip Purposes 2019 Report

Great Britain Domestic Overnight Trips Summary - All Trip Purposes – 2019

How to read these tables

The data on the 'data' worksheet summarise trip characteristics and demographics of travellers for domestic overnight trips of all purposes taken in England in 2019.

‘Trips’ are classified as trips or journeys away from home involving an overnight stay, taken by adults aged 16 and over and accompanying children aged up to 15. Each adult or child present on the trip counts as a trip, for example, a family of 2 adults and 2 children taking a trip away would count as 4 trips. Each line should be read separately – it is not possible to combine trip results from the GBTS survey.

‘Nights’ are the number of nights away taken by adults and accompanying children on these trips. Each night away spent by an adult or a child present on the trip counts as a night. Thus, a family of 2 adults and 2 children taking a 3 night trip away from home would count as 12 nights.

‘Spend’ is the expenditure relating to these trips. It includes costs paid in advance of the trip, costs paid during the trip itself and also any bills relating to the trip received after returning home. It covers costs paid by adults on the trip for themselves and on behalf of others on the trip, including children. It also includes costs paid on behalf of the person taking the trip, such as an employer paying the cost of a business trip.

All numerical results are in millions. All data is from the Great Britain Tourism Survey (GBTS).

All trip purposes - England	**Trips** (Millions)	**% of Trips**	**Nights** (Millions)	**% of Nights**	**Spend** (£Millions)	**% of Spend**
Purpose of trip						
All trip purposes	99.07	100%	290.32	100%	£19,448	100%
Holidays	46.41	47%	147.34	51%	£10,982	56%
Holidays 1-3 nights	31.58	32%	60.08	21%	£6,120	31%
Holidays 4+ nights	14.83	15%	87.26	30%	£4,863	25%
Visits to Friends and Relatives	36.13	36%	105.18	36%	£4,088	21%
Business	13.98	14%	29.80	10%	£3,937	20%
Other	2.56	3%	7.99	3%	£441	2%
Destination type						
Seaside	20.61	21%	77.73	27%	£4,463	23%
City/large town	45.22	46%	108.25	37%	£9,086	47%
Small town	18.79	19%	51.59	18%	£2,880	15%
Countryside/village	15.71	16%	48.22	17%	£2,798	14%
Regions visited						
West Midlands	8.88	9%	20.97	7%	£1,451	7%
East of England	9.72	10%	31.44	11%	£1,661	9%
East Midlands	7.56	8%	21.48	7%	£1,153	6%
London	12.16	12%	28.48	10%	£3,035	16%
North West England	14.07	14%	37.90	13%	£2,940	15%
North East England	4.25	4%	12.52	4%	£800	4%
South East England	15.83	16%	42.19	15%	£2,555	13%
South West England	18.94	19%	66.94	23%	£4,133	21%
Yorkshire and The Humber	9.55	10%	27.45	9%	£1,690	9%

All trip purposes - England	Trips (Millions)	% of Trips	Nights (Millions)	% of Nights	Spend (£Millions)	% of Spend
Accommodation						
Commercial accommodation	61.17	62%	168.66	58%	£15,554	80%
Commercial serviced accommodation	42.77	43%	90.04	31%	£11,067	57%
Hotel/motel	35.81	36%	71.39	25%	£9,296	48%
Guest house/B&B	4.86	5%	11.92	4%	£1,259	6%
Self catering (incl caravan and camping)	19.12	19%	80.28	28%	£4,554	23%
Caravan or camping	10.14	10%	42.90	15%	£1,759	9%
Self catering (excl caravan and camping)	8.94	9%	36.90	13%	£2,764	14%
Friend's home/Relative's/Own second home/static caravan/time share	36.85	37%	113.07	39%	£3,367	17%
Month Trip Started						
January-2019	5.52	6%	13.50	5%	£1,088	6%
February-2019	6.01	6%	15.20	5%	£1,153	6%
March-2019	6.84	7%	17.91	6%	£1,292	7%
April-2019	9.24	9%	25.69	9%	£1,678	9%
May-2019	10.00	10%	28.56	10%	£1,851	10%
June-2019	8.24	8%	25.45	9%	£1,754	9%
July-2019	9.83	10%	32.59	11%	£2,219	11%
August-2019	11.97	12%	41.81	14%	£2,652	14%
September-2019	7.53	8%	21.62	7%	£1,510	8%
October-2019	6.81	7%	18.79	6%	£1,393	7%
November-2019	7.51	8%	15.94	5%	£1,383	7%
December-2019	9.58	10%	33.27	11%	£1,476	8%

All trip purposes - England	Trips (Millions)	% of Trips	Nights (Millions)	% of Nights	Spend (£Millions)	% of Spend
Lifecycle						
16-34 unmarried no children	11.59	12%	39.00	13%	£2,066	11%
16-34 married no children	7.22	7%	17.85	6%	£1,302	7%
16-34 with children	8.98	9%	25.76	9%	£1,389	7%
35-54 no children	17.57	18%	45.06	16%	£3,962	20%
35-54 with children	20.71	21%	53.88	19%	£3,641	19%
55+	32.95	33%	108.60	37%	£7,076	36%
Car						
Car in household	89.09	90%	253.57	87%	£17,768	91%
No car in household	9.98	10%	36.75	13%	£1,680	9%
Children (under 16)						
Children in household	31.09	31%	83.94	29%	£5,322	27%
No children in household	67.98	69%	206.38	71%	£14,126	73%
Working						
Full time	49.46	50%	125.39	43%	£10,730	55%
Part time	15.35	15%	43.38	15%	£2,548	13%
Other	34.26	35%	121.54	42%	£6,170	32%
Marital Status						
Married	67.23	68%	189.90	65%	£13,213	68%
Not Married	31.83	32%	100.39	35%	£6,233	32%

All trip purposes - GB	**Trips** (Millions)	**% of Trips**	**Nights** (Millions)	**% of Nights**	**Spend** (£Millions)	**% of Spend**
Social Grade						
AB	41.29	42%	112.88	39%	£8,758	45%
C1	31.54	32%	94.66	33%	£5,880	30%
C2	15.46	16%	47.80	16%	£2,899	15%
DE	10.79	11%	34.98	12%	£1,910	10%
Age						
16-24	10.96	11%	37.43	13%	£1,805	9%
25-34	16.88	17%	45.35	16%	£2,964	15%
35-44	18.20	18%	48.06	17%	£3,172	16%
45-54	20.08	20%	50.87	18%	£4,431	23%
55-64	16.49	17%	49.26	17%	£3,762	19%
65+	16.47	17%	59.34	20%	£3,314	17%

Appendix 10: Visit England - Occupancy Survey for July 2022

England Occupancy Survey

July 2022 Results

Created by

Summary of Results

When comparing July 2022 results with July 2021, **room occupancy** in July 2022 increased from 65% to 83%, whilst bedspace occupancy increased from 47% to 60%. In July 2022, room supply increased by 2.9% (in relative terms), when compared with July 2021. Meanwhile, room demand increased by 32.3% (in relative terms), when compared with July 2021.

RevPAR, which is the total room revenue divided by the total number of available rooms, increased by 90% to £108.86 in July 2022, when compared with the same month last year.

Looking at hotel performance across **destination types**, City / Large Town hotel room occupancy increased the most from 63% to 83%, followed by Small Town hotel occupancy, which increased from 72% to 81%, and Seaside hotel occupancy, which increased from 84% to 86%. The smallest change from last year was recorded for Countryside hotels as occupancy increased from 78% to 79%.

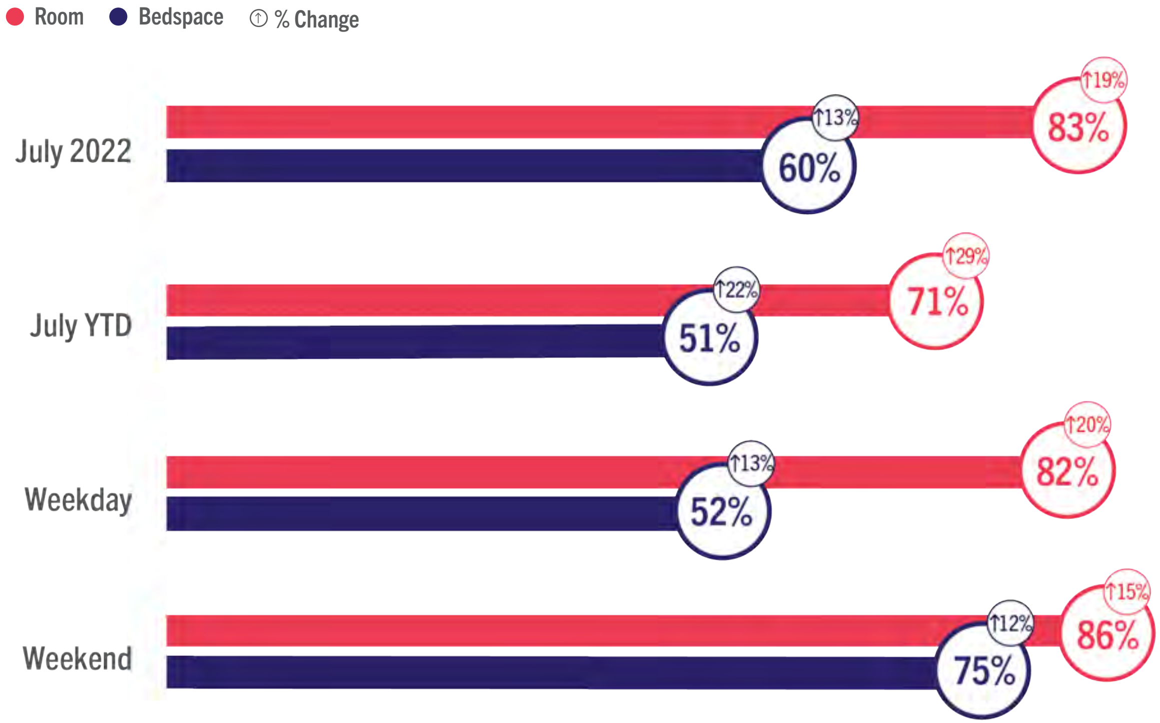
Assessing occupancy rates by **establishment size**, hotels with 101+ rooms increased the most from 60% to 83%, followed by hotels with 1-25 rooms, which increased occupancy from 71% to 81%, and hotels with 51-100 rooms which increased occupancy from 77% to 85%. The smallest change from last year was recorded for hotels with 26-50 rooms as occupancy increased from 76% to 83%.

Evaluating trends across the **9 regions** of England, all regions achieved increased room occupancy compared with the same month last year. The three regions that recorded the greatest change in room occupancy from last year were Greater London, which increased occupancy from 49% to 85%, followed by West Midlands, which increased occupancy from 65% to 80%, and Southeast England, which increased occupancy from 70% to 83%.

Throughout this report occupancy comparisons with last year are in absolute terms. Meanwhile, ADR and RevPAR year-on-year comparisons are in relative terms. Please see the Methodology Statement for more information on this, and regarding the current data during the Covid-19 pandemic.

England Room and Bedspace Occupancy

At a glance - July 2022



*Please note: As of February 2019 occupancy percentage changes are expressed in absolute terms. For more information please see 'Methodology Statement' on page 16.

England Room and Bedspace Occupancy

Data Tables - July

Room Occupancy

Room Occupancy	2019	2020	2021	2022
July	85%	29%	65%	83%
July YTD	77%	43%	42%	71%
Weekday	84%	29%	61%	82%
Weekend	88%	30%	72%	86%

Bedspace Occupancy

Bedspace Occupancy	2019	2020	2021	2022
July	60%	21%	47%	60%
July YTD	54%	30%	29%	51%
Weekday	54%	19%	39%	52%
Weekend	76%	26%	63%	75%

Room supply and room demand Year-on-year relative percentage change	2019	2020	2021	2022
Room Supply	2.2%	-14.3%	15.0%	2.9%
Room Demand	1.9%	-70.7%	154.8%	32.3%

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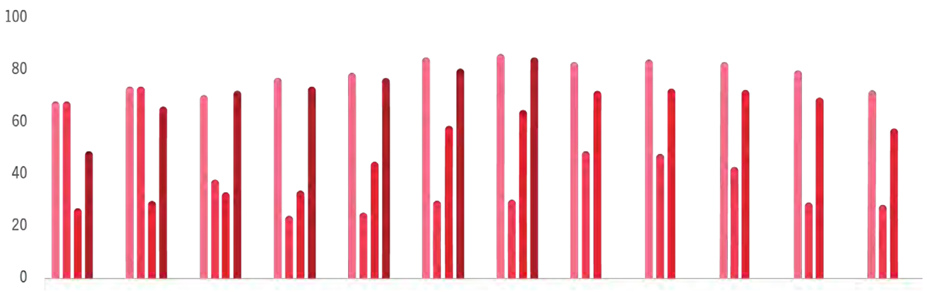
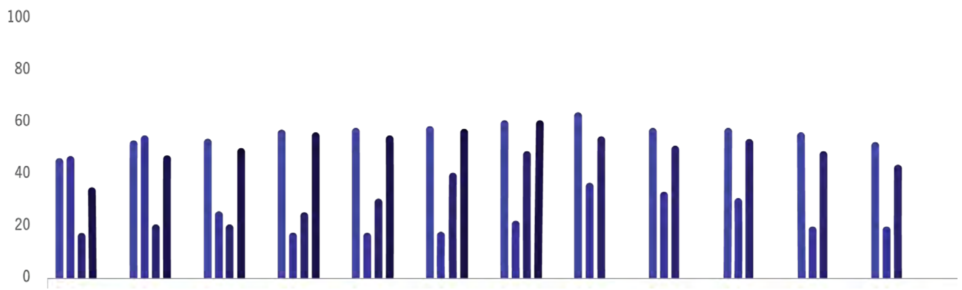
England Room and Bedspace Occupancy

Data Tables



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	65%	73%	75%	76%	78%	83%	85%	82%	83%	82%	79%	71%
2020	65%	73%	37%	22%	23%	24%	29%	47%	46%	41%	28%	27%
2021	24%	29%	33%	34%	42%	56%	65%	71%	72%	71%	68%	56%
2022	47%	65%	71%	73%	76%	80%	83%					

England Room Occupancy by Month



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	45%	52%	53%	56%	57%	58%	60%	63%	57%	57%	55%	51%
2020	46%	54%	25%	16%	17%	16%	21%	36%	32%	30%	19%	19%
2021	16%	20%	22%	24%	30%	40%	47%	53%	50%	52%	47%	42%
2022	34%	46%	49%	55%	54%	57%	60%					

England Bedspace Occupancy by Month

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England ADR and RevPAR

At a glance - July 2022

*Please note: ADR and RevPAR year-on-year percentage changes are shown in relative terms.

England ADR and RevPAR

Data Tables – July

ADR	2019	2020	2021	2022
July	£107.86	£67.27	£88.55	£130.95
Weekday	£107.31	£65.24	£82.18	£125.84
Weekend	£109.35	£71.98	£99.98	£141.13

RevPAR	2019	2020	2021	2022
July	£91.87	£19.59	£57.22	£108.86
Weekday	£90.41	£18.72	£50.35	£102.76
Weekend	£96.06	£21.69	£71.64	£121.67

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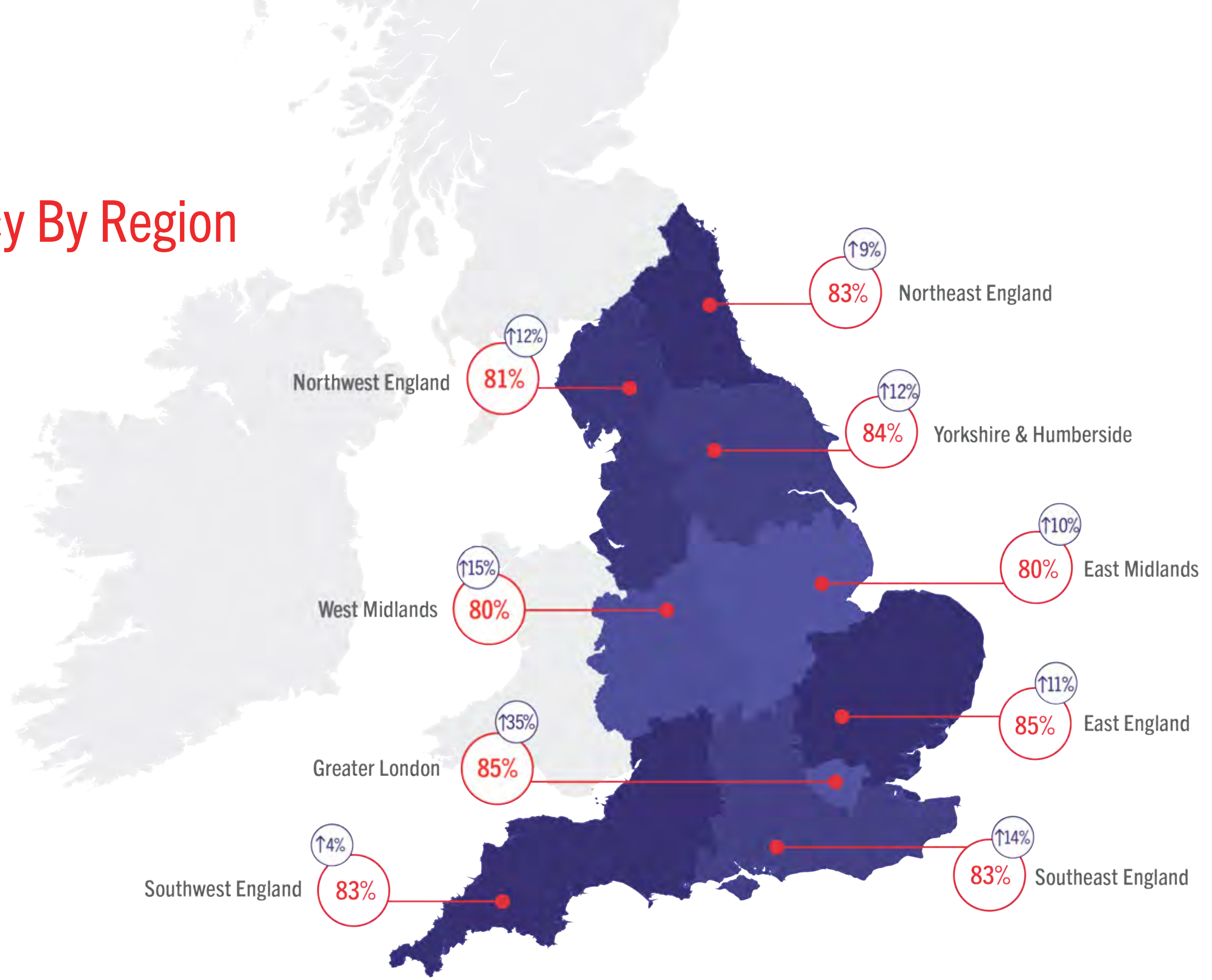
Room Occupancy By Region

At a glance - July 2022

*The figures in the graphic show the latest month occupancy figures and year-on-year percentage changes (in absolute terms).



Occupancy By Region

Data Tables - July

Room Occupancy	2019	2020	2021	2022
East England	83%	36%	74%	85%
East Midlands	79%	28%	70%	80%
Greater London	90%	20%	49%	85%
Northeast England	82%	31%	75%	83%
Northwest England	83%	30%	68%	81%
Southeast England	86%	30%	70%	83%
Southwest England	87%	39%	80%	83%
West Midlands	77%	28%	65%	80%
Yorkshire & Humberside	82%	32%	72%	84%

Bedspace Occupancy	2019	2020	2021	2022
East England	59%	26%	53%	61%
East Midlands	55%	20%	50%	57%
Greater London	65%	15%	36%	62%
Northeast England	58%	22%	53%	59%
Northwest England	58%	22%	49%	58%
Southeast England	60%	21%	50%	60%
Southwest England	60%	27%	56%	59%
West Midlands	51%	19%	45%	55%
Yorkshire & Humberside	58%	23%	52%	61%

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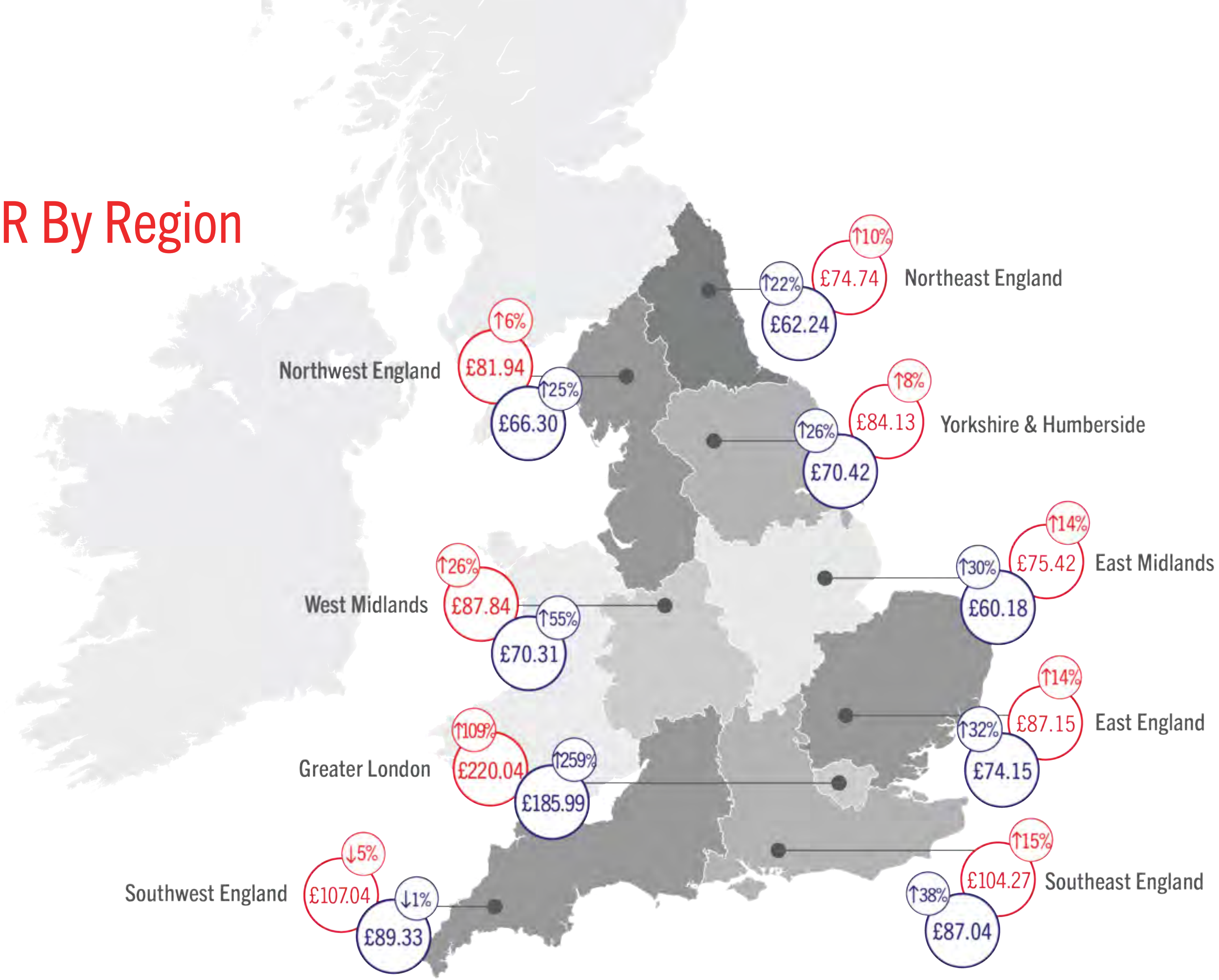
ADR and RevPAR By Region

At a glance - July 2022

*The figures in the graphic show the latest month revenue figures and year-on-year percentage changes (in relative terms).

● ADR ● RevPAR ⓘ % Change



ADR and RevPAR By Region

Data Tables - July

ADR

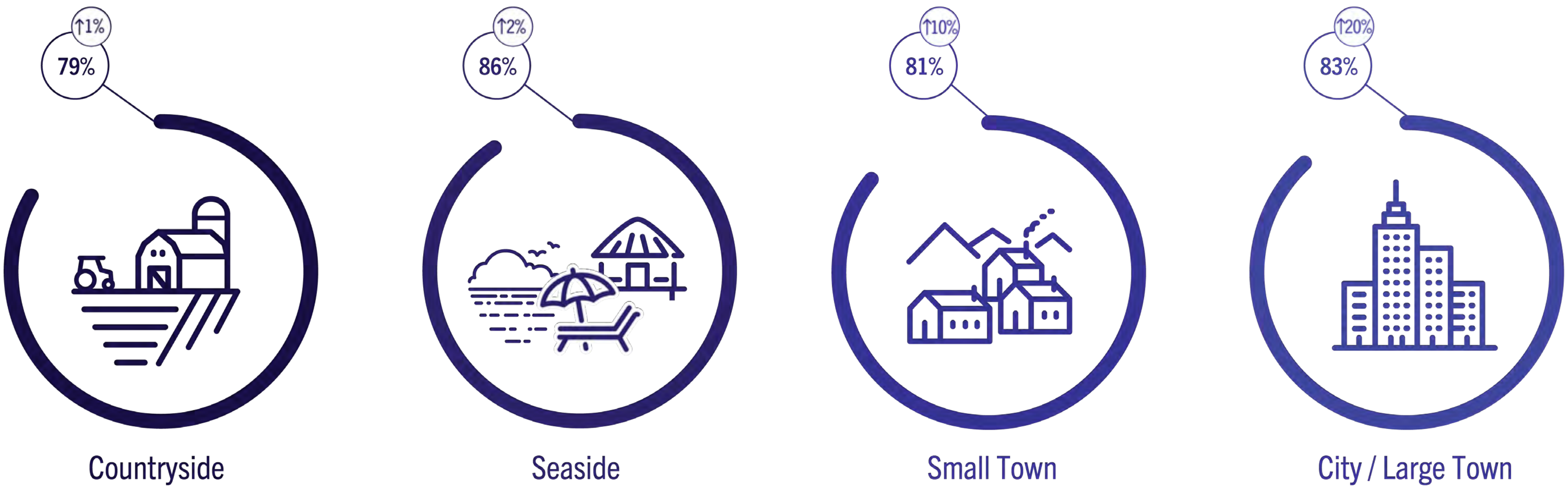
ADR	2019	2020	2021	2022
East England	£73.63	£57.55	£76.32	£87.15
East Midlands	£66.17	£54.70	£66.07	£75.42
Greater London	£174.41	£83.77	£105.40	£220.04
Northeast England	£63.26	£57.30	£68.18	£74.74
Northwest England	£73.39	£61.14	£77.29	£81.94
Southeast England	£83.27	£69.78	£90.48	£104.27
Southwest England	£89.13	£78.55	£112.53	£107.04
West Midlands	£65.91	£54.10	£69.56	£87.84
Yorkshire & Humberside	£68.50	£55.78	£77.63	£84.13

RevPAR

RevPAR	2019	2020	2021	2022
East England	£61.31	£20.97	£56.19	£74.15
East Midlands	£51.96	£15.38	£46.37	£60.18
Greater London	£157.30	£17.10	£51.82	£185.99
Northeast England	£52.14	£17.51	£50.86	£62.24
Northwest England	£60.71	£18.38	£52.90	£66.30
Southeast England	£71.45	£21.16	£63.18	£87.04
Southwest England	£77.58	£30.71	£89.91	£89.33
West Midlands	£50.50	£14.95	£45.29	£70.31
Yorkshire & Humberside	£56.42	£17.74	£55.69	£70.42

Room Occupancy By Destination Type

At a glance - July 2022



*Please note: As of February 2019 occupancy percentage changes are expressed in absolute terms. For more information please see 'Methodology Statement' on page 16.

Occupancy By Location Type

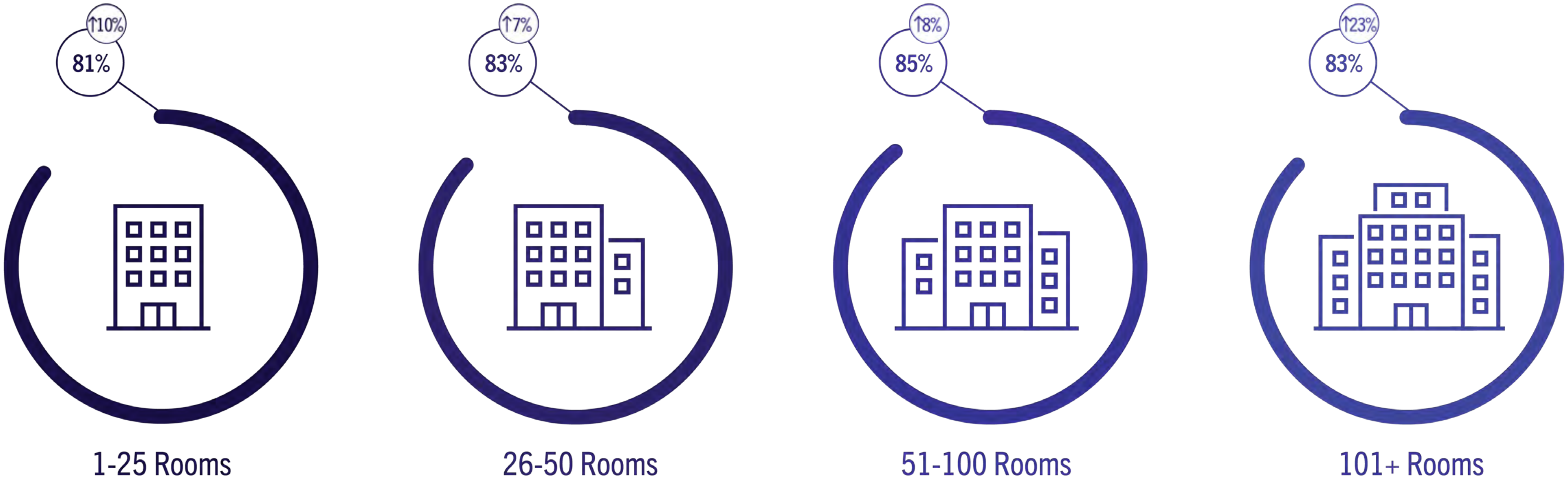
Data Tables - July

Room Occupancy	2019	2020	2021	2022
City / Large Town	85%	27%	63%	83%
Small Town	83%	30%	72%	81%
Countryside	84%	41%	78%	79%
Seaside	87%	49%	84%	86%

Bedspace Occupancy	2019	2020	2021	2022
City / Large Town	59%	19%	44%	59%
Small Town	60%	22%	52%	60%
Countryside	57%	29%	54%	55%
Seaside	65%	37%	64%	65%

Room Occupancy By Number of Rooms

At a glance - July 2022



*Please note: As of February 2019 occupancy percentage changes are expressed in absolute terms. For more information please see ‘Methodology Statement’ on page 16.

Occupancy By Number of Rooms

Data Tables - July

Room Occupancy	2019	2020	2021	2022
1 to 25 Rooms	81%	44%	71%	81%
26 to 50 Rooms	83%	39%	76%	83%
51 to 100 Rooms	84%	36%	77%	85%
101+ Rooms	86%	25%	60%	83%

Bedspace Occupancy	2019	2020	2021	2022
1 to 25 Rooms	59%	32%	52%	60%
26 to 50 Rooms	59%	28%	55%	60%
51 to 100 Rooms	61%	27%	57%	63%
101+ Rooms	60%	18%	42%	59%

Methodology Statement

In July 2017, a change of suppliers was made to the occupancy data. The data is now collected via a syndicated panel of over 3,000 hotels and other accommodation businesses provided by Hotel Market Data and Benchmarking Company - STR. STR collects the following performance metrics from participating properties either on a daily or monthly basis through their online platform or data feeds:

- Number of rooms available
- Number of rooms sold
- Total room revenue

These baseline figures are used to calculate the three most relevant metrics within the accommodation industry namely: Occupancy, Average Daily Rate (ADR) and Revenue Per Available Room (RevPAR). All units given throughout this report represent a positive number, unless stated otherwise.

To allow a meaningful comparison of year-on-year trends, VisitEngland and STR have included historical data from STR's own participating properties in the reports from July 2017 onwards. The historical data displayed in these reports is not consistent with reports published prior to the July 2017 report.

Further details about STR's panel and data collection can be found in our methodology note.

All previous months' reports and data can be found on the VisitEngland website.

In February 2019, a change in reporting style was made to refer to percentage changes of occupancy data in absolute terms. Please note that the room and bedspace occupancy figures in this report are rounded to the nearest whole number. As a result, occupancy absolute percentage change figures may have a discrepancy of ±1%. All previous reports prior to February 2019 show percentage changes of occupancy data in relative terms. ADR, RevPAR, Supply & Demand percentage changes continue to be shown in relative terms.

Due to Covid-19, the England hotel industry saw an unprecedented number of hotels temporarily close their doors starting in March of 2020. Throughout the pandemic, STR has continued to collect performance data from those hotels who remained open. The data in this month's report is therefore only based on those hotels that were open and reported data to STR (N=3,568).

For information on how to contribute and participate in the England Occupancy Study and benefit from STR's property level benchmarking reports, please email hotelinfo@str.com.

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Appendix 11: BH & HPA UK Holiday Parks - Economic Impact Summary 2012

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BH&HPA

UK Holiday Parks - Economic Impact Summary

January 2012

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ECONOMIC IMPACT OF THE UK HOLIDAY PARKS INDUSTRY

UK Holiday Parks Industry - Headline Figures

- 496,000 holiday park units / pitches – 277,760 owned statics, 49,600 rented statics and 168,640 touring pitches
- 53,000 direct and indirect jobs in the UK

Each year:

- £4 billion total turnover and visitor expenditure
- £1.4 billion Gross Value Added (GVA) contribution
- 19.5 million visitors and 168 million visitor days

1 This overview of the economic impact of the UK holiday parks industry was commissioned from Roger Tym & Partners (RTP) in January 2012 by the British Holiday Home & Park Association (BH&HPA). Its purpose is to extrapolate the findings of a 2011 study into the holiday parks industry in Wales to cover the whole of the UK.

Background

2 The Wales study was jointly funded by BH&HPA and Visit Wales to provide independent, evidence based understanding of the direct and indirect economic impact / contribution of the holiday park sector in Wales from the different types of accommodation unit[1] provided in holiday parks.

3 The study took place in 2011 and included extensive fieldwork throughout Wales. We interviewed a representative selection of park owners (covering 43 parks in total) and carried out face to face visitor surveys with 517 people at 21 parks at three different times in the season. This fieldwork was backed up by desk research and interviews with key stakeholders to understand the past, current and future trends in the industry and the catalytic economic impacts.

4 While the results of any study based on surveys and sampling must be considered indicative rather than absolute, we believe that we obtained sufficient information for the results to give a reasonably accurate and interesting picture of the industry in Wales. The BH&HPA subsequently commissioned RTP to extrapolate the results of the Wales study to cover the whole of the UK.

[1] For the purposes of the study, accommodation provided at holiday parks was categorised as 'tourers' or 'statics'. Tourers included caravans, tents, motorhomes and trailer tents that were brought to the park and then moved on at the end of the holiday. Statics covered all accommodation in the park that remained there all season and included caravans, lodges, chalets, cottages etc.. The statics category was subdivided into 'owned' and 'rented', ie those that were privately owned and those that were owned by the park and rented out for holidays throughout the season.

UK Economic Impact

5 Most of the results set out below have been calculated using the key findings from the Wales study, along with assumptions provided by the BH&HPA on the number of different types of accommodation units throughout the UK. These findings and assumptions are appended to this report. In addition, for the calculations of the total turnover, visitor expenditure, GVA and total jobs figures, we have used the RTP Econ IA model (as explained in paragraph 16)

Total Economic Impact

6 The total turnover and visitor expenditure as a result of the UK holiday park industry is approximately £4 billion per annum. Its total economic impact to the UK has been calculated as a Gross Value Added (GVA) contribution of £1.4 billion per annum supporting a total of 53,000 direct and indirect jobs in the UK. A fuller explanation of how these total figures were derived is given in paragraphs 14 – 16 and Table 2 below.

7 The estimated total park and visitor expenditure and GVA by accommodation type is assumed to be the same as for the Wales Study, and is shown in the following table

Table 1 Expenditure & GVA by Accommodation Type per annum

	Accommodation Type		
	Owned Static Unit	**Rented Static Unit**	**Touring Pitch**
Park expenditure per unit	£3,625	£5,900	£200
Visitor expenditure per unit	£3,900	£9,400	£2,600
Total spend per unit per annum	£7,525	£15,300	£2,800
Total GVA per unit per annum	£3,390	£6,900	£1,340

8 As noted in the Wales report, the difference between expenditure (and therefore GVA) between accommodation types is not surprising given the required expenditure by parks on rented static units such as marketing, cleaning, additional maintenance and more frequent unit replacement than is the case with owned units. Visitor expenditure is also higher for rented static units due to their higher occupancy rates than owned static units. Touring pitches require the least amount of park expenditure and had the lowest occupancy rates, reflecting the generally shorter season for tourers

Accommodation Unit Numbers

9 There are 496,000 holiday park units / pitches in the UK of which 56% are owned static units (ie caravans, lodges, chalets etc), 10% are rented static units and 34% are touring pitches (for caravans, tents, trailer tents and motor homes).

Visitor Numbers

10 The UK holiday park industry attracts approximately 19.5 million visitors per annum, who spend a total of 168 million visitor days in static and touring accommodation.

- Of these 19.5 million visitors, 11.7 million stay in static owned units, 4 million stay in rented static units and 3.8 million stay in tourers
- Of the 168 million visitor days, 100.5 million are spent staying in static owned units, 35 million in rented static units and 32.5 million in touring caravans and tents.

Park Spend on Goods and Services

11 UK parks spend £1.338 billion per annum on goods and services. Of that total, £642 million (48%) is spent on new and secondhand static units and £696 million on other items (maintenance, utilities, rates, equipment, stock for owned on-park shops, etc.)

Direct Staff Numbers, Costs

12 The UK holiday park industry supports 26,500 FTE direct jobs at an average wage per FTE job of £18,500

Visitor spend

13 Total spend by all holiday park visitors in the UK was calculated at approximately £2 billion per annum.

Total Economic Impact (Gross)

14 To estimate the total economic impacts of holiday parks in the UK, we draw on some of the findings from the Wales study. Specifically, these relate to ratios of holiday park turnover, operators' spending and employment by accommodation unit type (i.e. static owned, static rented and touring), along with the park visitor spending and assumptions for second round multiplier effects. After applying these figures and assumptions to the UK's figures for trips to holiday parks (by unit type), we estimate that holiday parks in the UK will generate a turnover of some £4 billion to the UK economy.

15 A simple RTP EconIA model approach converts the turnover figures for UK holiday parks into output (GVA) and jobs (FTEs) using ONS (ABI 2009) data about the UK economy at sector level. This simple model estimates that UK holiday parks will contribute to some £1.4 billion GVA to the national economy, supporting some 53,000 FTE jobs. Further analysis of these figures is given in Table 2.

Table 2 Summary of Output, GVA and Jobs in UK Holiday Park Industry

	Parks / Site			Visitor Expenditure				Total
	On Site	Multiplier Effects	**Total Park**	Static Owned	Static Rented	Touring	**Total Visitors**	
Turnover £m	£1,338	£612	**£1,950**	£986	£637	£395	**£2,017**	**£3,967**
GVA £m	£533	£327	**£860**	£269	£187	£124	**£579**	**£1,439**
FTE Jobs	26,479	9,433	**35,912**	7,753	5,719	3,543	**17,015**	**52,927**

Source: RTP (derived from Wales Study and ONS (ABI) data)

16 The figures in Table 2 are derived from a different and somewhat basic approach to those presented for Wales using the Tourism Impact Model (TIM) for the simple reason that the

TIM model was not available for the UK and no additional primary research was undertaken. Consequently, these UK based estimates should be treated with more caution. Further, these figures give the gross impacts by accounting for direct, indirect and secondary round of multipliers but with no allowance for leakage (although at the national level we would expect this to be very small), displacement or deadweight loss – i.e. it reports economic impact gross of these factors.

Other Benefits

17 The following additional benefits were noted in the Wales Study and will also apply to the holiday home industry UK-wide

Catalytic Impacts

- The holiday park sector is very important part of the UK visitor economy, because of its size and its apparent resilience in the recent economic downturn
- The sector impacts on other parts of economies local to individual parks – for example many local shops, garages, visitor attractions etc survive because of trade from visitors staying at the holiday parks
- The sector was felt to have changed considerably over the last decade in particular enhancements to parks' landscaping and the improved image of the sector

Social and Environmental Benefits

18 The Parks also provide a wide range of social and environmental benefits to their local communities (into which most appear to be well integrated):

- Social benefits – for example charity fund raising (some have raised hundreds of thousands of pounds over the last ten years), support for local sports teams (e.g. funds for kit or travelling expenses), support to community infrastructure (one park had donated £25,000 towards the building of a new village hall), the use of park facilities by local people (e.g. swimming pool, tennis courts, shops), and additional public transport services laid on due to demand from park users which also benefit local inhabitants.
- Environmental benefits – Environmental management on site, for example providing and maintaining wildlife areas, wetlands and woodland walks, or in one case maintaining a Site of Special Scientific Interest (SSSI) within the park boundary. Also support to off-site projects such as joint ventures with local environmental groups such as county Wildlife Trusts, maintenance of local footpaths and coastal paths, providing a ranger for protected sand dunes, repairing sea defences, and providing information boards for areas of local environmental interest.

APPENDIX ONE

Assumptions (from the BH&HPA's knowledge of their membership)

- Results from the Wales study are deemed to represent an industry average, as results from Scotland, Northern Ireland and northern England (where the colder weather and other circumstances might suggest a shorter season) are likely to balance out those from the warmer areas of southern England
- Across the UK, 85% of static units are privately owned and the remaining 15% are rented out as part of the park's letting fleet. The rented sector proportion is assumed to be slightly higher than for the Wales study in 2011 (11.5%) as the difficult UK (and global) economic circumstances increase the 'staycation' phenomenon which raises demand for domestic holiday lets while also making tougher times for the sale of privately-owned statics. The BH&HPA is also seeing increased sub-letting of owned units (i.e. owners renting out to holidaymakers either directly or through the park) which also supports our use of the 15% rented figure

Accommodation Type Totals

- BH&HPA members own and manage 75% of all static unit pitches (owned and rented) and 60% of all touring pitches in the UK.
- From BH&HPA membership figures we estimate there are 496,000 holiday park units / pitches in the UK of which 56% are owned static units (ie caravans, lodges, chalets etc), 10% are rented static units and 34% are touring pitches (for caravans, tents, trailer tents and motor homes).

Findings from the Wales Study applied to the UK-wide Study

Park Owners' Expenditure

- Park owners' spend on all goods and services averages £2,890 per unit / pitch. Highest spend is on rented static units (average £5,900 per rented static unit) followed by £3,625 per owned static unit and £200 per touring pitch. Excluding purchases of new and used static units, the average expenditure per unit / pitch was reduced to £1,500.

Direct Staff – Numbers and Costs

- The number of staff working on the parks fluctuates throughout the season with many jobs being part time and / or temporary (some for just a few hours a week).
- One FTE job is created for every 15 static units and every 36 touring pitches
- The average wage per FTE job on park is £18,500 and the median wage £16,000 (i.e. there are more lower paid jobs e.g. cleaners and maintainers than higher paid jobs e.g. managers and accountants)

Stay Characteristics (from Visitor Surveys)

Length of Stay

- The average length of stay of all visitors per holiday is 8.6 days. Longest average stay is by visitors in owned static units (10.2 days), followed by touring visitors (7.6 days) and then visitors to rented static units (6.2 days).
- The average number of days that owners expect to use their unit per year is 83.5. In addition, owners allow other people (eg family and friends) to stay an average of 25 days per annum, making a total average of 108.5 days usage per owned static unit

Group Size

- The average size of group in all types of accommodation is 3.49 people comprising an average of 2.21 adults and 1.28 children. Groups in owned static units average 3 people, in rented static units average 4.82 people and in tourers 3.54 people

Visitor Spend

- The average spend per group while away from home is £337 or an average of £11.25 per person per day. Highest category of expenditure is eating and drinking out (30%, split between 16% on park and 14% off park) followed by purchasing food and drink (for self catering) at off park shops (26%), and transport (14%)
- Visitors in rented static units appear to spend slightly more (£13.20) a day than the average visitor spend, while visitors in touring units spend £12 and those in owned static units spend £11

19 Static unit owners incur additional expenditure (insurance and maintenance) averaging £418 per unit per annum

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