Inbound Tourism - UK - November 2012

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"Amongst Olympic visitors, the European proportion was slightly lower than the 'normal' inbound visitor profile, the North American proportion was significantly higher than normal and the proportion from other countries also higher. The Games, relatively speaking, gave more of a boost to inbound long-haul travel. This may offer UK tourism authorities a future opportunity to capitalise on the increased level of interest from non-European visitors, tempting them back for further trips or engaging them as brand ambassadors for the UK."

– John Worthington, Senior Analyst

In this report we answer the key questions:

- **Could the Pound's partial recovery against the euro change the game for inbound leisure travel?**
- **What other forms of accommodation, apart from hotels, have benefited from rising inbound holiday demand?**
- **Are APD tax rises having an impact on inbound leisure tourism?**
- **How can the 'inbound tourism jam' be spread more widely through the UK?**
- **Many overseas consumers prefer Italy or Spain as holiday destinations, so how can the UK compete?**

Overall, overseas visitor levels (all travel purposes) to the UK fell by 6% between 2007 and 2011 during a period of international economic upheaval, but leisure travel has bucked the trend, rising by 11.6% during this period, aided by the Pound's weakness.

Inbound holiday volumes are expected to finish 2012 roughly on a par with 2011, despite the disruptions of an Olympic year and the Pound's partial recovery. In the long term, the UK needs to safeguard its core European and North American source markets whilst attracting more long-staying travellers from emerging market middle classes, as the UK seeks to build on the global platform established by brand Britain during the summer Games.

This report explores the key components and dynamics of the inbound leisure tourism market, includes market size and forecasts and reviews the core strategies and initiatives of some of the major players in tourism promotion and transport infrastructure. The report also incorporates a consumer survey carried out amongst the UK's five leading source markets, analysing visitor experience, future intentions, reasons for wanting to come and for not wanting to come to the UK and European destinations preferred to the UK.