

Quarterly Inbound Update Full Year 2018

24 May 2018

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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 24 May 2018 and provides an update on the provisional 2018 data released in March 2019.

When available the [Inbound research & insights](#) section of the VisitBritain website will contain much more detail on long term trends, visits from individual markets and to UK regions.

The data is based on interviews with a sample of departing visitors. The number interviewed varies but is typically 3,000-4,000 per month.

- All percentage changes in spend are nominal. 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.

Refer to the [ONS website](#) for more on IPS methodology and UK outbound travel

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Q4 2018
(October – December)
**Inbound market
statistics**



UK Highlights

Q4 2018

Visits, spend and nights

	Q4 2018 (October – December)	% change vs. Q4 2017
ALL VISITS (million)	9.2m	3%
Spend (£ billion)	£5.2bn	0%
Nights (million)	57.2m	-2%

- There were **9.2 million visits** to the UK in Q4 2018 – this was up 3% compared to Q4 2017 although still the second highest Q4 ever recorded (Q4 2016 is the highest).
- Inbound visitor spending was in line with Q4 2017. Visitors **spent £5.2 billion** in the UK during Q4 2018.
- In total **57.2 million nights** were spent in the UK by inbound visitors during Q4 2018, down 2% year-on-year.

UK Highlights

Q4 2018

Journey purpose

By journey purpose	Q4 2018 (October - December) Visits (million)	% change vs. Q4 2017	Q4 2018 (October - December) Spend (£bn)	% change vs. Q4 2017
Holiday	3.4	13%	£2.2	13%
VFR	3.0	2%	£1.4	10%
Business	2.1	-5%	£1.1	-21%
Miscellaneous	0.6	-10%	£0.5	-17%

- **Holiday** visits to the UK in Q4 2018 were up 13% on Q4 2017 - enough to set a new record. Holiday visitor spending also rose 13% to £2.2 billion, another Q4 record, and the first time holiday visitors have spent in excess of £2bn in the UK between October to December.
- There were 3 million visits to visit friends or relatives (**VFR**) for the third consecutive quarter this year and up 2% on 2017. VFR spending rose 10% from Q4 2017 to a new Q4 record of £1.4 billion.
- **Business** visits fell 5% in Q4 2018 compared to Q4 2017 to 2.1 million. Spending was also down but by a bigger 21% to £1.1 billion.
- Visits for **miscellaneous purposes** (including study) fell by 10% to 645,000 with spending down 17% to £490 million.

UK Selected Market Highlights (1)

Q4 2018

Country of residence	Visits (000)				Spend (£m)			
	Q4 2017	Q4 2018	Growth	New record	Q4 2017	Q4 2018	Growth	New record
Australia	204	191	-6%		£225	£156	-31%	
Belgium	281	253	-10%		£87	£104	18%	
Brazil*	44	52	17%		£53	£31	-41%	
Canada	173	178	3%		£141	£152	7%	yes
China	62	94	52%	yes	£124	£160	30%	yes
Denmark	182	189	4%		£97	£105	8%	
Finland*	56	46	-17%		£26	£27	5%	
France	937	901	-4%		£380	£311	-18%	
Germany	772	771	0%		£315	£385	22%	yes
Hong Kong*	39	43	10%		£42	£51	21%	
India	118	112	-5%		£92	£144	57%	yes
Irish Republic	688	717	4%		£212	£222	5%	
Italy	445	453	2%		£251	£184	-27%	
Japan*	58	47	-18%		£52	£45	-12%	
Netherlands	477	507	6%		£139	£183	32%	
Norway	224	207	-7%		£127	£113	-11%	
Poland	451	407	-10%		£104	£116	12%	
Portugal*	112	109	-2%		£56	£38	-32%	
Romania	234	305	30%	yes	£90	£147	63%	yes
Spain	515	692	34%	yes	£201	£307	53%	yes
Sweden	197	202	3%		£105	£86	-18%	
Switzerland	234	229	-3%		£131	£117	-11%	
United Arab Emirates	73	106	44%	yes	£116	£129	12%	
USA	771	777	1%		£719	£655	-9%	

*sample size below 100

UK Selected Market Summary (2)

Q4 2018

- **USA:** visits increased 1% (compared to Q4 2017) to 777,000 in Q4 2018. The USA remains the most valuable inbound market to the UK, with £655 million spent in the UK in Q4, but this is down 9% compared to Q4 2017 and down 24% from the record set in Q4 2016.
- **Spain:** there was a Q4 record of 692,000 visits to the UK in Q4 2018, up 34% on Q4 2017. Spending too set a new Q4 record in 2018, up 53% to £307 million and the first time Q4 spending has topped £300 million.
- **France:** in Q4 2018 there were 901,000 visits from France to the UK, 4% fewer than in Q4 2017 and the seventh consecutive quarter (since Q2 2017) where year on year quarterly visits have fallen. French visitor spending fell 18% to £311 million in Q4 2018 compared to the record spending levels seen in Q4 2017.
- **Germany:** visits in Q4 2018 were on par with Q4 2017 at 771,000 visits. However there were record breaking spending results. Inbound German visitors spent £385 million in the UK between October and December 2018, up 22% compared to Q4 2017.
- **Australia:** visits were down 6% compared to Q4 2017 to 191,000 in Q4 2018. Australian visitors spending decreased by a nearly a third (31%) in Q4 2018, compared to Q4 2017, to £156 million.

UK Selected Market Summary (3)

Q4 2018

- **Canada:** Q4 2018 saw visits from Canada increase 3%, compared to Q4 2017 – though not enough to claim the record from Q4 2016. There were 178,000 visits. Spending rose by 7% to a new Q4 record of £152 million – the second consecutive quarter of record breaking spend.
- **Irish Republic:** visits increased in Q4 2018, up 4% to 717,000. Visitor spending from the Irish Republic has also increased, up 5% in Q4 2018 compared to Q4 2017, at £222 million.
- **China:** posted record breaking results in Q4 in 2018. Visits to the UK from China in Q4 2018 were up 52% to 94,000 – the 9th consecutive record quarter for visits. Visitors spent £160 million in the UK between October and December 2018 – 30% up compared to Q4 2017.
- **India:** October to December 2018 saw 112,000 visits from India to the UK (down 5% on the same time the year before). Visitor spending did set a new record though. Indian visitors spent a total of £144 million in the UK in Q4 2018, up a massive 57% on Q4 2017.
- **GCC combined:** visits from these combined countries were up 35% to 188,000. Spending was also up, rising 7% to £322 million in Q4 2018. Q4 2013 continues to hold the both the Q4 visits and spending records from these markets. (*GCC combined includes: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates*)

Full Year 2018
(January – December)
**Inbound market
statistics**



UK Highlights

Full Year 2018

Visits, spend and nights

	2018	% change vs. 2017
ALL VISITS (million)	37.9	-3%
Spend (£ billion)	£22.9	-7%
Nights (million)	266.1	-7%

- There were **37.9 million visits** to the UK in 2018 (down 3% compared to the record holding 2017). This is the first annual decline since 2010.
- Visitors **spent £22.9 billion** in the UK during 2018. This is 7% behind the spending levels in 2017 and £1.6 billion below the record set in 2017.
- In total **266.1 million nights** were spent in the UK by inbound visitors during 2018, down 7% on 2017 record setting results.

UK Highlights

Full Year 2018

Journey purpose

	2018 Visits (million)	% change vs. 2017	YTD 2018 Spend (£bn)	% change vs. 2017
Holiday	15.1	-2%	£10.4	-3%
VFR	11.8	-2%	£5.7	-3%
Business	8.4	-4%	£4.5	-15%
Miscellaneous	2.6	-16%	£2.3	-14%

- Despite setting new Q3 and Q4 records, **holiday** visits in 2018 fell 2% to 15.1 million in 2018 – compared to the strong 2017 result. Holiday spending was also down in 2018, compared to the record set in 2017 to £10.4 billion (down 3%).
- Journeys to visit friends and relatives (**VFR**) fell by 2% in 2018 to 11.8 million. Spending also fell but by 3% to £5.7 billion. 2017 continues to hold the record for both VFR visits and spend.
- **Business** visits fell 4% in 2018 to 8.4 million – the second year of decline. Spending by business visitors was down 15% in 2018 (compared to 2017) after posting negative double digit declines in 3 out of the 4 quarters in 2018. Prior to the declines starting in 2017, business visits had generally been in steady recovery since 2009 with records being set in 2016.
- Visits for **miscellaneous purposes** (including study) fell 16% to 2.6 million. Spending was also down, by 14% compared to 2017, to £2.3 billion.

UK Selected Market Highlights (1)

Full Year 2018

Country of residence	Visits (000)				Spend (£m)			
	2017	2018	Growth	New record	2017	2018	Growth	New record
Argentina	147	138	-6%		£176	£146	-17%	
Australia	1,092	1,003	-8%		£1,194	£1,044	-13%	
Austria	307	322	5%	yes	£186	£147	-21%	
Bahrain*	37	29	-21%		£93	£81	-13%	
Belgium	1,148	1,116	-3%		£393	£399	1%	
Brazil	244	240	-2%		£263	£215	-18%	
Bulgaria	262	266	2%	yes	£105	£114	8%	yes
Canada	835	850	2%		£604	£676	12%	yes
Chile*	49	40	-19%		£29	£32	10%	
China	337	391	16%	yes	£694	£657	-5%	
Croatia*	45	55	22%		£30	£38	23%	yes
Czech Republic	375	412	10%		£132	£121	-8%	
Denmark	730	735	1%		£359	£379	6%	
Egypt*	43	43	1%		£77	£44	-43%	
Estonia*	28	24	-13%		£15	£12	-24%	
Finland	258	214	-17%		£125	£114	-8%	
France	3,956	3,693	-7%		£1,425	£1,386	-3%	
Germany	3,380	3,262	-4%		£1,581	£1,520	-4%	
Greece	213	200	-6%		£141	£115	-18%	
Hong Kong	230	243	6%	yes	£299	£385	29%	yes
Hungary	415	437	5%	yes	£137	£138	1%	yes
Iceland	122	113	-8%		£90	£80	-11%	

UK Selected Market Highlights (2)

Full Year 2018

Country of residence	Visits (000)				Spend (£m)			
	2017	2018	Growth	New record	2017	2018	Growth	New record
India	562	511	-9%		£454	£491	8%	yes
Indonesia*	46	45	-2%		£58	£54	-7%	
Irish Republic	3,029	2,782	-8%		£941	£895	-5%	
Israel	265	278	5%	yes	£253	£229	-9%	
Italy	1,779	1,808	2%		£841	£784	-7%	
Japan	247	247	0%		£250	£282	13%	
Kenya*	42	39	-9%		£59	£44	-25%	
Kuwait	124	105	-15%		£395	£273	-31%	
Latvia*	171	155	-9%		£44	£39	-10%	
Lithuania	327	372	14%	yes	£81	£117	44%	yes
Luxembourg*	83	76	-8%		£42	£45	7%	
Malaysia	179	165	-8%		£260	£168	-35%	
Malta*	104	72	-30%		£75	£36	-52%	
Mexico	155	153	-1%		£101	£81	-20%	
Netherlands	2,136	1,954	-9%		£747	£716	-4%	
New Zealand	220	216	-2%		£214	£255	19%	yes
Nigeria	119	107	-10%		£190	£152	-20%	
Norway	712	673	-5%		£378	£394	4%	
Oman*	36	35	-3%		£62	£49	-21%	
Pakistan	69	102	47%		£118	£110	-7%	
Philippines*	46	45	-2%		£35	£46	29%	yes

UK Selected Market Highlights (3)

Full Year 2018

Country of residence	Visits (000)				Spend (£m)			
	2017	2018	Growth	New record	2017	2018	Growth	New record
Poland	1,807	1,817	1%		£394	£453	15%	
Portugal	482	431	-11%		£207	£163	-21%	
Qatar	79	108	37%	yes	£191	£228	19%	yes
Romania	944	987	5%	yes	£299	£479	60%	yes
Russia	227	181	-20%		£188	£153	-18%	
Saudi Arabia	161	166	3%	yes	£862	£424	-51%	
Serbia*	45	46	1%	yes	£27	£31	12%	yes
Singapore	229	178	-22%		£266	£219	-18%	
Slovakia*	179	142	-21%		£65	£38	-41%	
Slovenia*	60	35	-41%		£21	£19	-9%	
South Africa	230	224	-3%		£261	£260	0%	
South Cyprus*	144	89	-38%		£105	£57	-46%	
South Korea	195	161	-17%		£184	£134	-27%	
Spain	2,413	2,530	5%	yes	£1,061	£1,110	5%	yes
Sweden	831	827	0%		£451	£447	-1%	
Switzerland	989	808	-18%		£585	£460	-21%	
Taiwan*	69	81	16%	yes	£65	£85	30%	
Thailand	94	93	-1%		£109	£147	35%	yes
Turkey	230	177	-23%		£155	£143	-8%	
Ukraine*	65	92	43%	yes	£44	£29	-34%	
United Arab Emirates	374	392	5%	yes	£618	£616	0%	
USA	3,910	3,877	-1%		£3,643	£3,378	-7%	

*sample size below 100

UK Selected Market Highlights (4)

Full Year 2018

- **USA:** visits were down 1% in 2018 to 3.9 million compared to the record set in 2017, although the USA still overtook France to become the UK's largest inbound market by volume. USA visitor spending was also down (7%), again against the record set in 2017. Putting the records of 2017 to one side, it is encouraging to see visits 12% higher in 2018 compared to 2016, and inbound visitor spending 1% higher.
- **China:** posted record visit results in all quarters of 2018. In total there were a record 391,000 visits from China to the UK in 2018, up 16% on 2017. While Q1 and Q4 saw record breaking spending levels, a decline in Q2 and Q3 (compared to the records set in 2017) means Chinese visitors spent a total of £657 million in 2018, 5% down on the record set in 2017.
- **France:** visits to the UK from France in were 7% down on the results posted in 2017 at 3.7 million. There have been 7 consecutive quarters of year on year visit declines to the UK from France (since Q2 2017). Visitor spending hasn't seen the largely negative visit trends more recently, although finished the year down 3% compared to 2017 results at £1.4 billion. This is still some way off the record spent in 2012 (£1.5 billion).
- **Australia:** there were just over 1 million visits from Australia to the UK in 2018 – down 8% on 2017 visit numbers. Spending too has not been as strong in 2018 in 2017, falling 13% in 2018 to a little over £1 billion.

UK Selected Market Highlights (5)

Full Year 2018

- **India:** there were 511,000 visits from India to the UK in 2018 – while Q3 set a new record this was not enough to offset depressed Q2 results. 2018 visits were down 9%. Visitors spent a combined £491 million (up 8% compared to 2017) and enough to set a new annual record.
- **Japan:** in 2018 inbound visits from Japan to the UK were on par with results seen in 2017. During the same period, visitor spending rose 13% – boosted by very strong Q2 2018 spending results. 1995 remains the record holder for visits and spend.
- **South Africa:** there were 224,000 visits to the UK from South Africa in 2018, slightly fewer (3%) than were seen in 2017. However, these visitors spent £260 million during their time in the UK – almost equalling the records set in 2006 and 2017.
- **GCC combined:** visits from these combined countries were up 3% in 2018 to a record breaking 836,000 – posting new Q1 and Q2 visit records along the way. Spending in 2018 fell 25% to £1.7 billion compared to the record set in 2017. (*GCC combined includes: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates*)
 - **Qatar** – 2018 was a record setting year. There were a record 108,000 visits to the UK from Qatar (up 37% on 2017) who spent a record £228 million, 19% more than they did in 2017.

Q4 2018
(October – December)
**Inbound UK regional
statistics**



Regional Highlights

Q4 2018

Visits and spend

Region	Visits (000)			New record
	Q4 2017	Q4 2018	Growth	
Scotland	633	632	0%	
Wales	177	156	-12%	
London	4,588	4,833	5%	
Rest Of England	3,681	3,758	2%	
North East*	128	93	-28%	
North West	742	683	-8%	
Yorkshire	275	317	15%	yes
West Midlands	534	515	-4%	
East Midlands	307	331	8%	yes
East Of England	534	553	4%	
South West	478	494	3%	
South East	1,113	1,158	4%	
UK TOTAL	8,920	9,163	3%	

Region	Spend (£m)			New record
	Q4 2017	Q4 2018	Growth	
Scotland	£390	£347	-11%	
Wales	£46	£85	83%	
London	£3,034	£2,977	-2%	
Rest Of England	£1,676	£1,715	2%	yes
North East*	£51	£40	-22%	
North West	£385	£310	-20%	
Yorkshire	£132	£159	21%	yes
West Midlands	£183	£202	11%	
East Midlands	£113	£160	42%	yes
East Of England	£158	£192	21%	
South West	£231	£199	-14%	
South East	£421	£453	8%	
UK TOTAL	£5,253	£5,233	0%	

Regional Summary

Q4 2018

Visits and spend

- **London**

In Q4, there were 4.8 million inbound visits to London – 5% more than Q4 2017. Between October and December 2017, inbound visitors to the capital spend a little under £3 billion (down 2% on Q4 2017).

- **Rest of England**

There were 3.8 million visits to the Rest of England in Q4 2018. This is 2% up on Q4 2017 and the second best Q4 on record (just 1% behind the record set in 2016). Q4 2018 spending did reach record Q4 levels though – visitors spent £1.7 billion, up 2% on Q4 2017.

- **Scotland**

With strong growth of inbound visits seen in Q4 2017, it was always going to be tough for Q4 2018 to see growth. There were 632,000 inbound visits in Q4 2018, on par with Q4 2017. Inbound visitor spending also dipped, by 11%, compared to the record set in Q4 2017, to £347 million.

- **Wales**

Visits fell 12% to 156,000 compared to Q4 2017. Spending was up a massive 83% on Q4 2017, to £85 million – but not enough to set a new Q4 spending record (set in 2006).

Full Year 2018
(January – December)
**Inbound UK regional
statistics**



Regional highlights

Full Year 2018

Visits and spend

Region	Visits (000)				Region	Spend (£m)			
	2017	2018	Growth	New record		2017	2018	Growth	New record
Scotland	3,210	3,538	10%	yes	Scotland	£2,276	£2,206	-3%	
Wales	1,079	941	-13%		Wales	£369	£405	10%	
London	19,828	19,090	-4%		London	£13,547	£12,329	-9%	
Rest Of England	16,496	15,708	-5%		Rest Of England	£7,814	£7,463	-4%	
North East	556	466	-16%		North East	£241	£293	21%	
North West	3,138	3,051	-3%		North West	£1,593	£1,351	-15%	
Yorkshire	1,341	1,392	4%	yes	Yorkshire	£567	£604	6%	yes
West Midlands	2,322	2,134	-8%		West Midlands	£807	£836	4%	
East Midlands	1,281	1,255	-2%		East Midlands	£444	£527	19%	yes
East Of England	2,407	2,199	-9%		East Of England	£815	£704	-14%	
South West	2,584	2,401	-7%		South West	£1,205	£1,129	-6%	
South East	5,320	4,927	-7%		South East	£2,138	£2,007	-6%	
UK TOTAL	39,214	37,905	-3%		UK TOTAL	£24,507	£22,897	-7%	

Regional summary (1)

Full Year 2018

Visits and spend

- Visits to **London** were down 4% in 2018 (compared to the strong 2017 results), at 19.1 million. Spending was also down (9%), again compared to the record set last year, to £12.3 billion – still the second best year on record.
- **Scotland** welcomed a record 3.5 million visits in 2018, 10% more than in 2017 after posting particularly strong Q1 and Q2 results. Visitor spending didn't quite reach level records in 2018 and was just below (3%) the record levels reported in 2017 - £2.2 billion (still the second highest annual spending).
- The number of visits to **Wales** fell 13% in 2018 (compared to the previous year) to 941,000 visits. Spend was on the rise, compared to 2017 – up 10% to £405 million. This result was driven by particularly strong Q1 and Q4 spending results.

Regional summary (2)

Full Year 2018

Visits and spend

- Visits to the **Rest of England** were down 5%, to 15.7 million visits in 2018. Spend was also down, by 4%, compared to the record equalling 2017, to £7.5 billion.
 - **North East:** visits down 16%. Spend was up 21% to £293 million – though not enough to set a new record (set in 2016).
 - **North West:** visits declined by 3% to just over 3 million and spend to fell 15% to £1.4 billion - compared to the record 2017.
 - **Yorkshire:** visits rose 4% to a record 1.4 million. Spend too reached record levels, up 6% to £604 million.
 - **West Midlands:** visits down 8% (compared to strong 2017 results) to 2.1 million while overall visitor spending was up by 4% to £836 million.
 - **East Midlands:** visits down (2%) to 1.3 million though spend was up 19% in the 2018 to a record setting £527 million.
 - **East of England:** visits down 9% on the record last year and spend down 14%.
 - **South West:** visits were 7% lower than the record last year; spend was 6% down at £1.1 billion.
 - **South East:** visits and spend are 7% and 6% behind the levels reported in the 2017 – there were 4.9 million visits, spending a little over £2 billion.