

Monthly Inbound Update February 2019

30th May 2019

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About this data

Our monthly update presents the latest International Passenger Survey (IPS) data released by the Office for National Statistics (ONS).

The Quarterly Release for this period (Q1, January – March 2019), which may contain some revisions, is scheduled to be released in July 2019. This will provide data on visits by markets and UK region visited up to Q1 2019.

The next Monthly Release, covering data for **March 2019**, is scheduled for **26th June 2019**.

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

Short term figures give an indication of the very latest trends, but should be used with caution. IPS is not designed to report accurately by month, and figures should be treated as indicative. Analysis of the last three months or longer is more reliable. All figures are provisional and subject to revision by the ONS. All figures quoted are not “seasonally adjusted”. Numbers in some tables / charts may not sum due to rounding.

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

Headlines – February 2019 (provisional)

| | FEBRUARY 2019 | | LAST 3 MONTHS (DEC - FEB) | | YEAR TO DATE (JAN - FEB 2019) | | ROLLING 12 MONTHS (MAR 2018 - FEB 2019) | |
|------------------------------|---------------|-----------------------------|------------------------------|--------------------------------------|----------------------------------|----------------------------------|--|--------------------------------------|
| | | % change vs. Feb 2018 | | % change vs. Dec '17 – Feb '18 | | % change vs. Jan – Feb '18 | | % change vs. Mar '17 – Feb '18 |
| ALL VISITS (000) | 2,200 | -8% | 7,710 | 3% | 4,840 | -1% | 37,860 | -2% |
| Spend (£ million) | 1,150 | -5% | 4,280 | 1% | 2,610 | -3% | 22,820 | -7% |

- Visits:** The UK received 2.2 million overseas visits in February 2019, down 8% year-on-year following a recording breaking February in 2018. There were 7.7 million inbound visits to the UK between December 2018 and February 2019, up 3% on the same period in 2017/2018. Despite these more positive results, overseas visits to the UK in the twelve months to February 2019 were 2% behind the previous twelve months with 37.9 million visits.
- Spending:** In February 2019 inbound visitors spent £1.2 billion, 5% behind the record breaking February in 2018. In the 3 months from December 2018 to February 2019 visitors spent a total of £4.3 billion, 1% above the 3 months to February 2018. As with visits, more recent results have not been enough to offset the year on year monthly declines posted earlier in 2018. In the twelve months to February 2019, visitors to the UK spent a total £22.8 billion, 7% lower compared to the previous twelve month period.
- Spend per visit:** In the twelve months to February 2019 visitor spending decreased more rapidly than overseas visits; as a consequence spend per visit in this period was down 4% on the previous twelve month period (March 2017 – February 2018), to £603 on average per visit.

Journey Purpose

| By journey purpose | FEBRUARY 2019 | | LAST 3 MONTHS (DEC - FEB) | | YEAR TO DATE (JAN - FEB 2019) | | ROLLING 12 MONTHS (MAR 2018 - FEB 2019) | |
|--------------------|---------------|-----------------------|---------------------------|--------------------------------|-------------------------------|----------------------------|---|--------------------------------|
| | Visits (000) | % change vs. Feb 2018 | Visits (000) | % change vs. Dec '17 - Feb '18 | Visits (000) | % change vs. Jan - Feb '18 | Visits (000) | % change vs. Mar '17 - Feb '18 |
| Holiday | 760 | 3% | 2,690 | 14% | 1,640 | 13% | 15,310 | 1% |
| VFR | 680 | -6% | 2,660 | -1% | 1,640 | -5% | 11,670 | -2% |
| Business | 610 | -12% | 1,810 | -4% | 1,240 | -7% | 8,360 | -5% |
| Miscellaneous | 160 | -27% | 550 | -6% | 330 | -13% | 2,530 | -14% |

- Holiday** visits were up 3% to 760,000 in February 2019, compared to February 2018 – setting a new record for the month. There were a record 2.7 million holiday visits to the UK in the 3 months to February 2019 following consecutive double digit growths across the 3 month period. Holiday visits for the twelve months to February 2019 were up 1% on the previous twelve month period, hitting 15.3 million.
- Visits to friends and relatives (VFR)** were down 6% year on year to 680,000 visits in February 2019. However, with sluggish results reported in 7 out of the last 12 months, VFR visits to the UK in the twelve months to February 2019 were 2% below the previous rolling twelve months with 11.7 million visits.
- Business** visits were at 610,000 in February 2019 down 12% year-on-year to their lowest level in 7 years. The 3 month period to February 2019 is tracking 4% lower than the year before, due to a weak performance across the first two months of 2019. During the last twelve months, business visit numbers were down 5% overall at 8.4 million following 7 of the 12 months posting year-on-year declines.
- Miscellaneous** journey purpose visits are a combination of a wide range of different journey purposes, including (but not limited to) short term study, looking for work, shopping, attending a sports event and many more. Compared to the other journey purpose categories, miscellaneous visits represent a smaller proportion of inbound UK visits and results do tend to fluctuate. In February 2019 there were 27% fewer visits to the UK for miscellaneous purposes than in February 2018. With mostly negative results reported in 2018, miscellaneous visits in the rolling twelve months to February 2019 are down 14%, compared to the previous twelve month period.

Global Regions

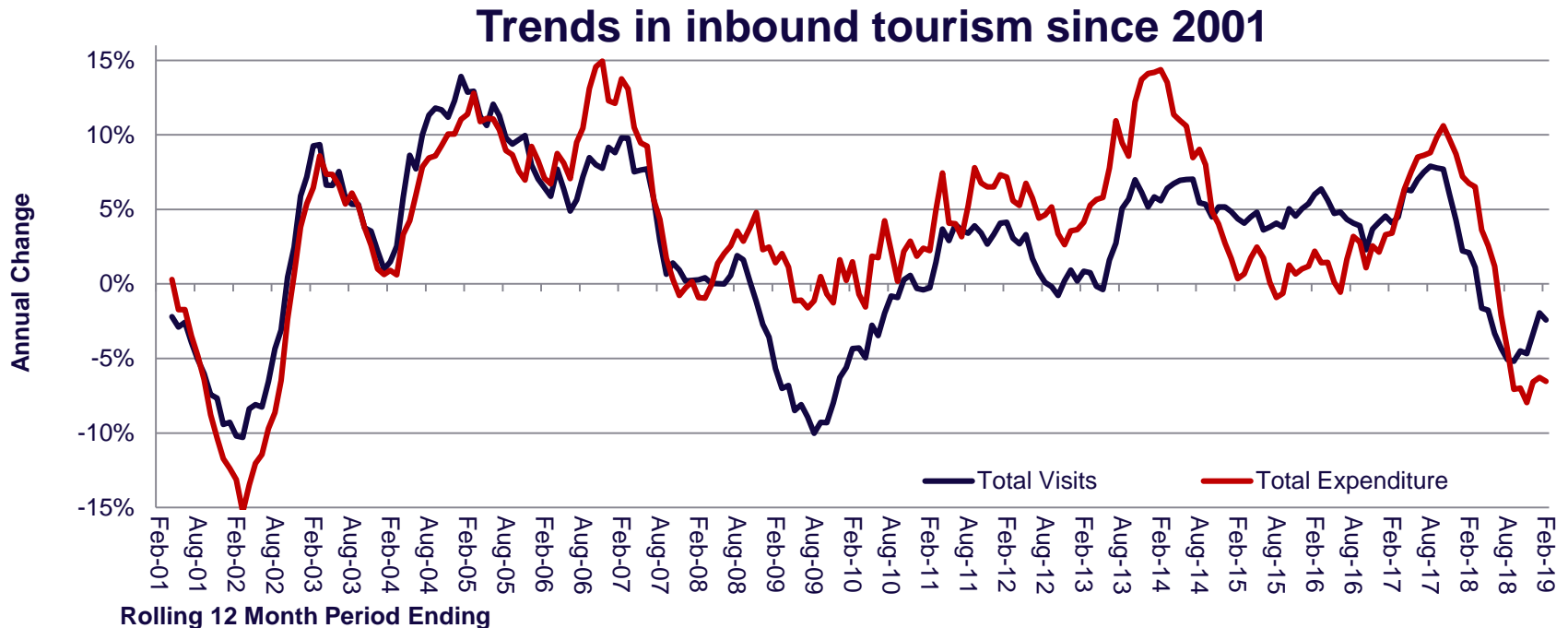
| By global region | FEBRUARY 2019 | | LAST 3 MONTHS (DEC - FEB) | | YEAR TO DATE (JAN - FEB 2019) | | ROLLING 12 MONTHS (MAR 2018 - FEB 2019) | |
|------------------|---------------|-----------------------------|------------------------------|--------------------------------------|----------------------------------|----------------------------------|--|--------------------------------------|
| | Visits (000) | % change vs. Feb 2018 | Visits (000) | % change vs. Dec '17 - Feb '18 | Visits (000) | % change vs. Jan - Feb '18 | Visits (000) | % change vs. Mar '17 - Feb '18 |
| EU Total | 1,570 | -7% | 5,340 | 5% | 3,330 | 1% | 24,830 | -1% |
| EU15 | 1,200 | -11% | 4,210 | 5% | 2,600 | 0% | 19,940 | -2% |
| Other EU | 370 | 10% | 1,130 | 7% | 730 | 4% | 4,890 | 1% |
| Rest of Europe | 120 | -13% | 450 | 1% | 250 | -11% | 2,200 | -11% |
| North America | 190 | -13% | 700 | -6% | 490 | 2% | 4,740 | -2% |
| Rest of World | 320 | -5% | 1,220 | -2% | 770 | -7% | 6,090 | -4% |

- In February 2019 there were 1.6 million visits to the UK from all **EU markets**, down 7% on February 2018. There was a late surge in visits towards the end of 2018 and across January 2019, resulting in visits in the 3 months to February 2019 posting a growth of 5% compared to the same period in 2017/2018. With 24.8 million visits from the EU in the 12 months to February 2019, visits are down just 1% compared to the previous twelve months.
- Visits to the UK from the **EU15** markets followed a very similar trend. There were 1.2 million visits to the UK in February 2019, down 11% on February 2018. Between December 2018 and February 2019 visits were 5% up on the same 3 months of 2017/2018. The combined EU15 markets are an important inbound market for the UK and with 19.9 million visits from these markets in the twelve months to February 2019, this is just below (2%) the levels seen in the previous twelve month period.
- Visits from all **Other EU** markets to the UK fluctuated on a month by month basis in 2018 and the start of 2019 has been no exception. Following a year-on-year declines in January 2019 (-3%) visits were up 10% to 370,000 visits in February 2019. Visits increased 1% across the last twelve months to February 2019, the only global region to see growth on a rolling twelve month basis.
- Visits to the UK from the **Rest of Europe** fell 13% year-on-year in February 2019. With depressed or flat results in every month of 2018 (except December), visits across the longer term rolling twelve months declined 11% compared to the same time frame the year before.
- There were 190,000 visits from **North America** in February 2019, 13% fewer than in February 2018. With relatively weaker results towards the end of 2018, visits in the 3 months to February 2019 are 6% below the same period a year ago. During the last twelve months, the UK received 4.7 million visits from this region, 2% lower than the period before, driven by volatile results throughout the year.
- **'Rest of World' markets** saw a 5% decline in visits in February 2019 compared to February 2018. At a rolling twelve month view, 6.1 million visits were received from 'Rest of World' markets, a drop of 4% compared to the previous last twelve months (March 2017 to February 2018).

Short term figures give an indication of the very latest trends, but should be used with caution. IPS is not designed to report accurately by month, and figures should be treated as indicative. Analysis of the last three months or longer is more reliable. The Q1 2019 release will provide data on visits by market.

Longer term trends

Visits and spend since 2001



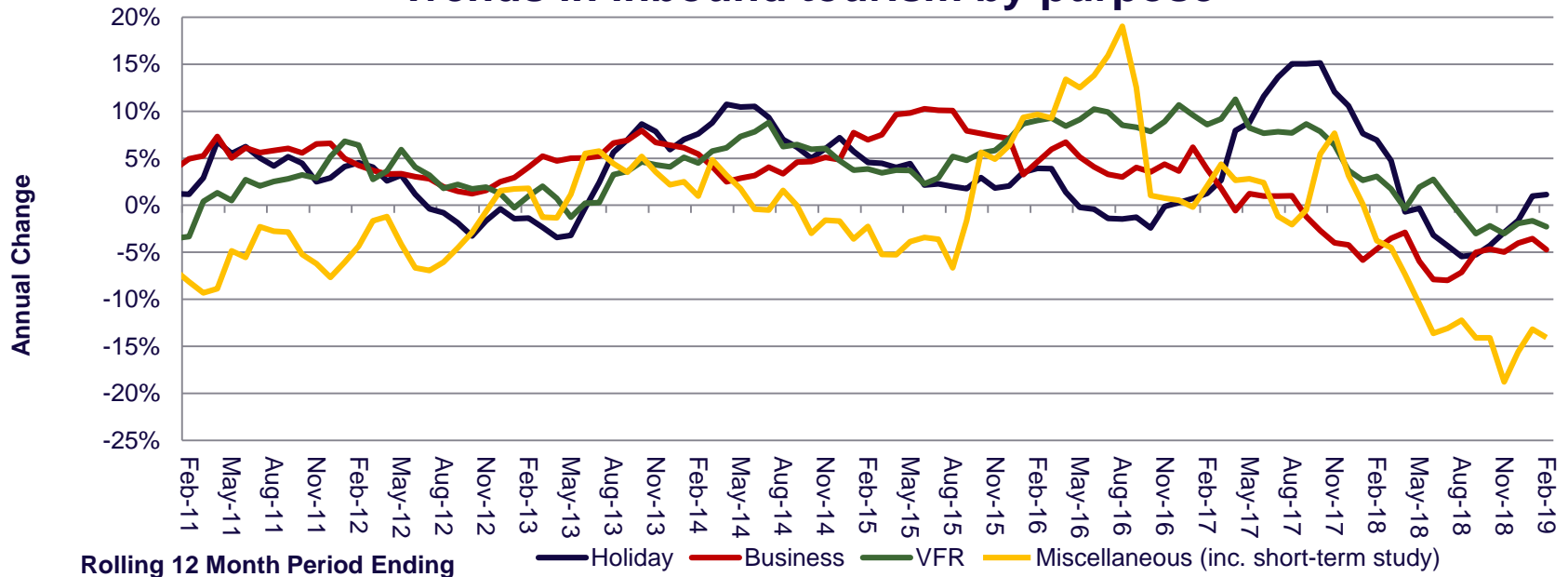
- This chart shows the year-on-year change in headline IPS results based on a 'rolling twelve-month' basis. Presenting the data in this way enables us to spot emerging trends and helps to 'smooth out' erratic results for any single month.
- This clearly illustrates the dip in inbound tourism seen post 9/11 in 2001-02, and subsequent recovery in the mid-2000s. The impact of the global economic crisis can be seen in 2009 followed by slow but reasonably steady recovery until late 2017. In 2018, however, there was a decline in visits and spend.
- Whilst visits growth has remained positive in recent years, spend has fluctuated more. As of February 2019, visits in the last twelve months were tracking 2% down and spend 7% down resulting from mixed month on month results across the most recent rolling twelve months.

More: Data on long term trends are available [here](#)

Longer term trends

Journey Purpose

Trends in inbound tourism by purpose

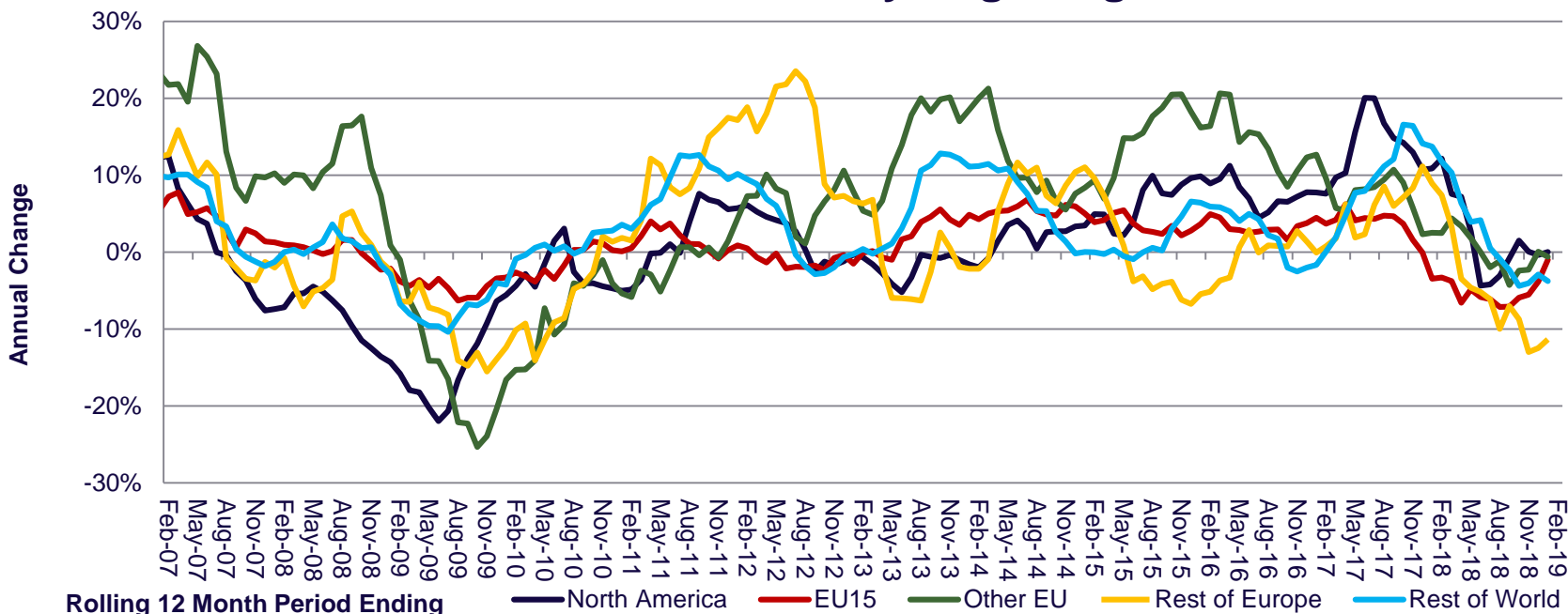


- By journey purpose holiday visits were far more resilient to the economic downturn in the late 2000s and mostly have shown long term growth. There has been some variability in recent years. Trends have been different for most journey purposes since 2014.
- After a significant downturn in 2009, business visits have generally seen steady growth since, which intensified in 2015. However, they started slowing down again in 2017 and have been decreasing for most of the past 12 months.
- Trips to visit friends and relatives have largely shown growth in recent years, and stayed in positive territory since mid-2013 until a decline in 2018. Trips for other (miscellaneous) purposes account for a smaller number of visits and show the most variation with a downward trend in the last several months.

Longer term trends

Global Region

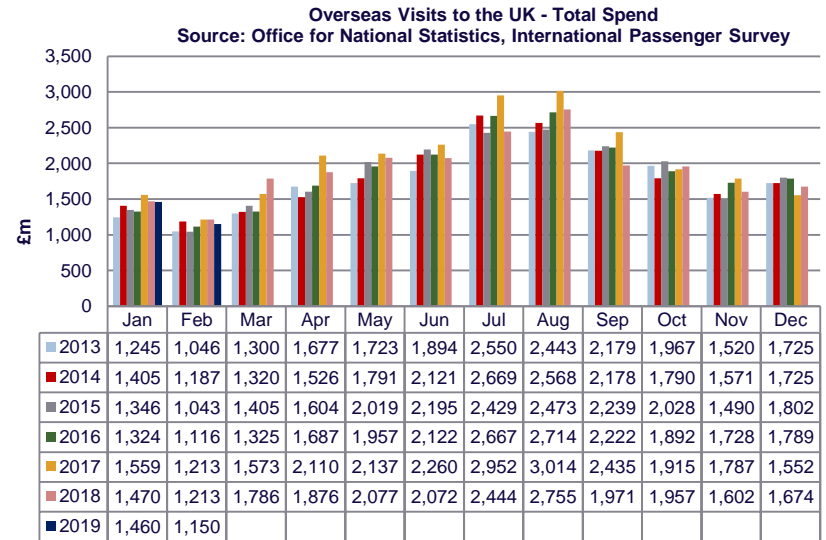
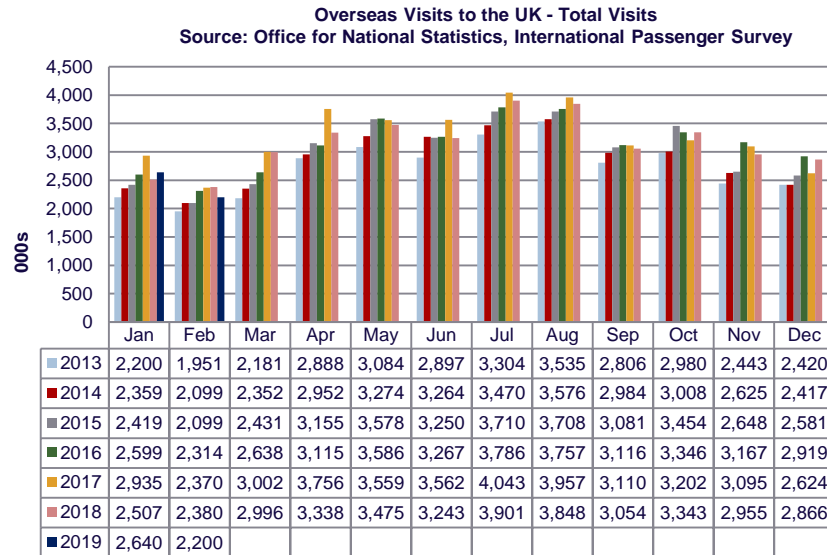
Trends in inbound tourism by origin region since 2007



- This chart shows the longer term picture and the varying rates of recovery in visit numbers after the global financial crisis.
- Until 2017, visits from EU markets were growing at a steady pace, but they have slowed down since and 2018 was down on 2017. Visits from 'Other EU' markets outside EU15 had stronger visit growth in 2013/2014 and between 2015 and 2017, although they have been inconsistent in recent months. Visits from the 'Rest of Europe' have been more volatile over the past few years, with a decline seen in 2018 and into 2019.
- Visits from North America grew strongly in 2017 and matched this level in 2018 despite a decline early in the year. Visits from the 'Rest of World' region were growing in 2017 but declined in 2018.

Detailed monthly trends

Visits and spend



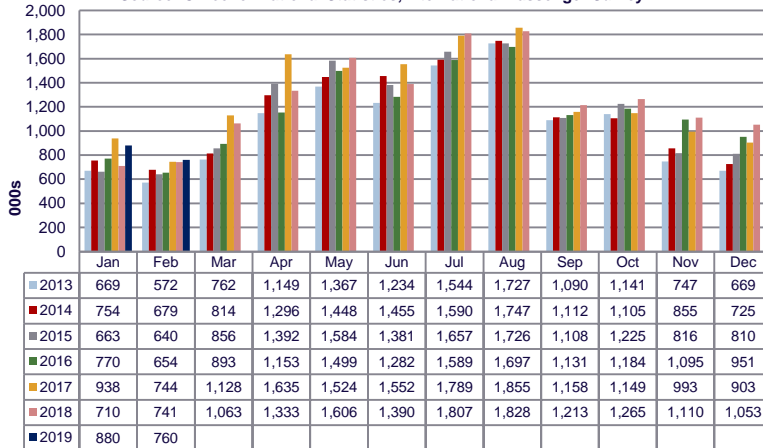
More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available [here](#)

Detailed monthly trends

Journey Purpose

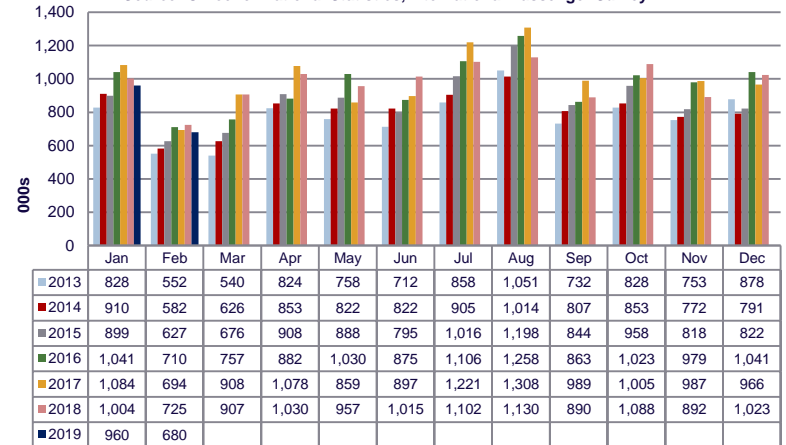
Overseas Visits to the UK - Holiday Visits

Source: Office for National Statistics, International Passenger Survey



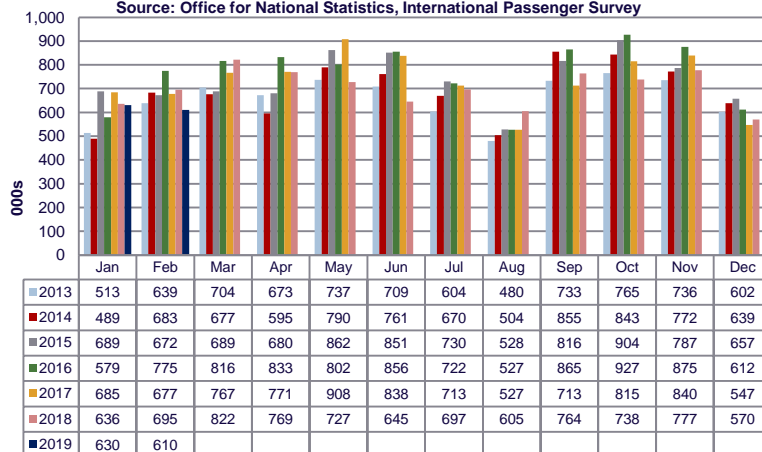
Overseas Visits to the UK - Visits to Friends and Relatives

Source: Office for National Statistics, International Passenger Survey



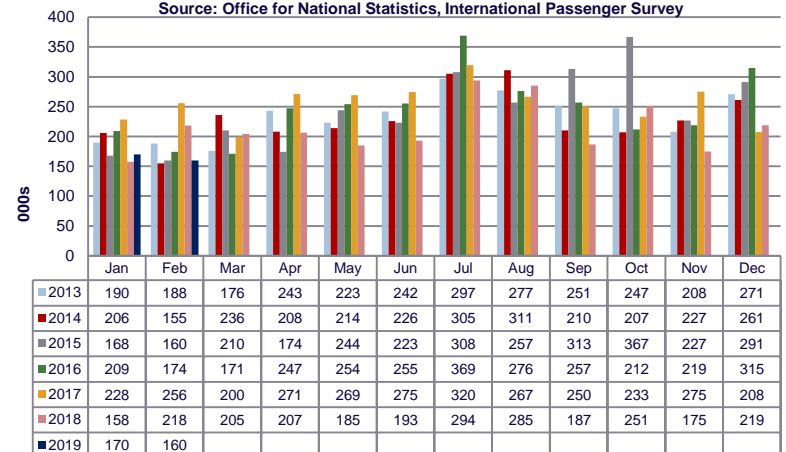
Overseas Visits to the UK - Business Visits

Source: Office for National Statistics, International Passenger Survey



Overseas Visits to the UK - Miscellaneous Visits (includes short-term study)

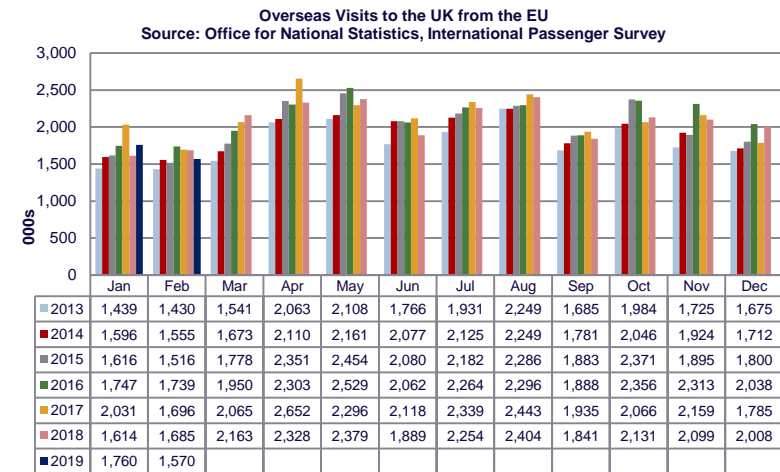
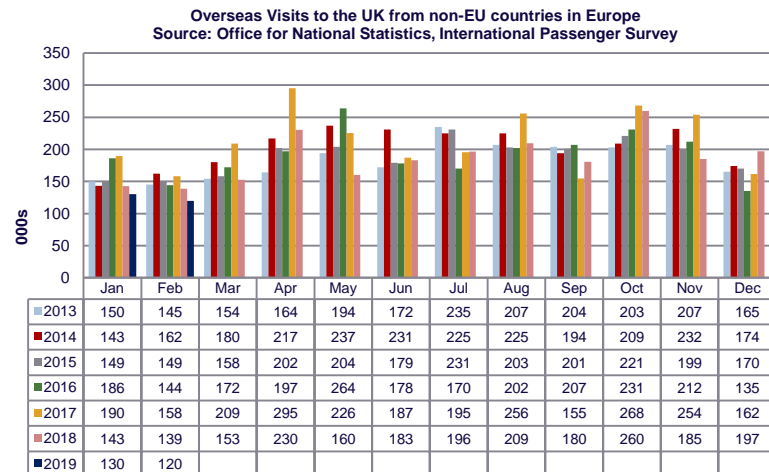
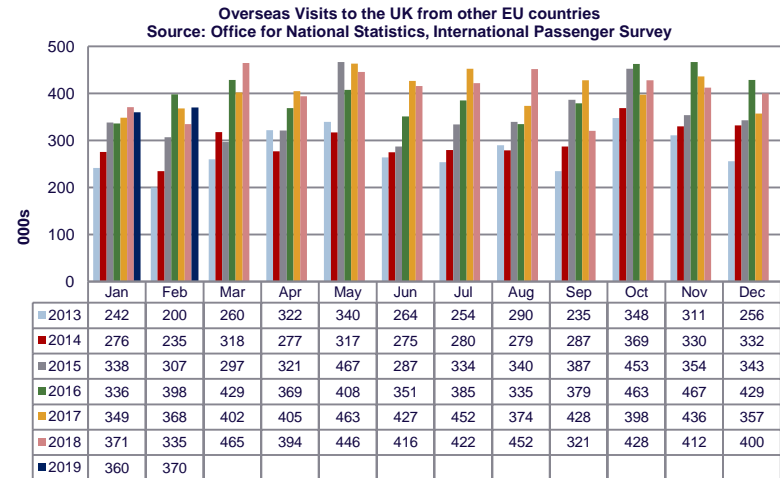
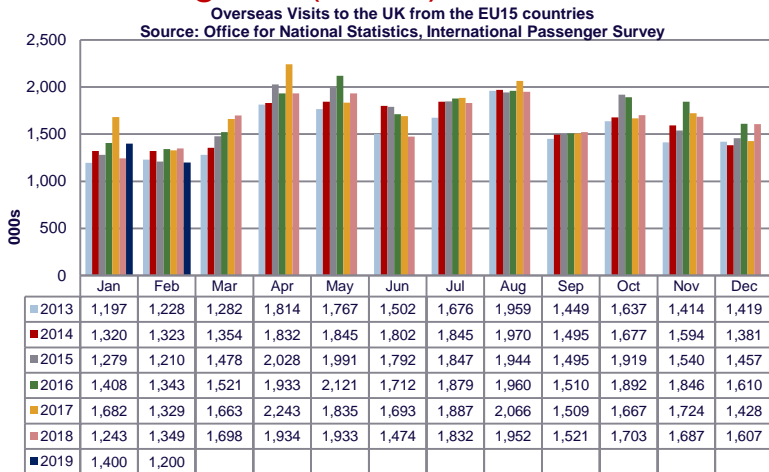
Source: Office for National Statistics, International Passenger Survey



More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available [here](#). Please note that different scales are used on these charts to allow differences to be identified.

Detailed monthly trends

Global Regions (1 of 2)

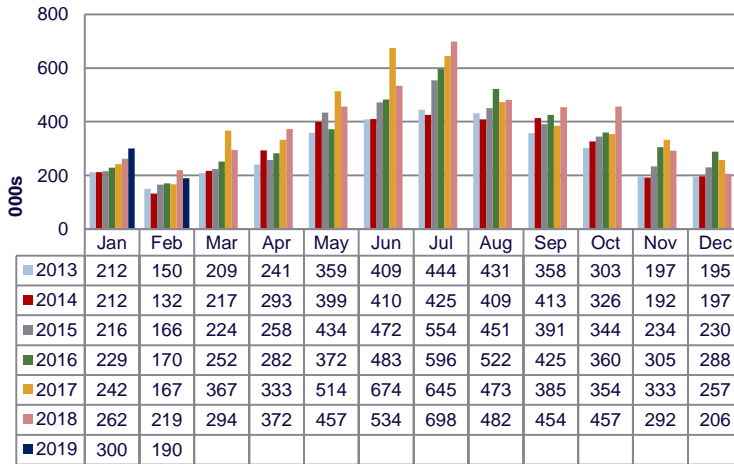


More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available [here](#). Please note that different scales are used on these charts to allow differences to be identified.

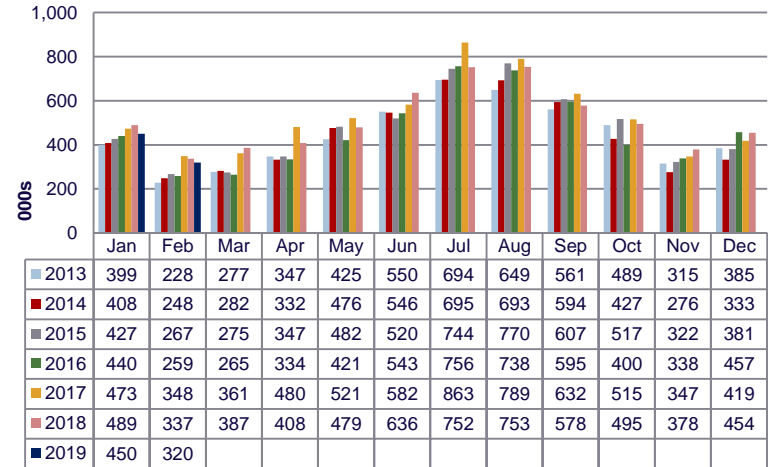
Detailed monthly trends

Global Regions (2 of 2)

Overseas Visits to the UK from North America
Source: Office for National Statistics, International Passenger Survey



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



More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available [here](#). Please note that different scales are used on these charts to allow differences to be identified.

Definitions

EU15 - Austria, Belgium, Denmark, France, Finland, Germany, Greece, Irish Republic, Italy, Luxembourg, Netherlands, Portugal, Spain and Sweden. Note that the UK is among the 15 countries that formed the European Union prior to January 2004, but due to the inbound nature of the data displayed in the IPS reference tables data for the UK is excluded.

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.

EU – Total EU, therefore combined EU15 and Other EU (as defined above).

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)

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

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

More information

The Inbound research & insights section of the VisitBritain website has much more detail on long term trends, data for individual markets and UK regions

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

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Monthly Inbound Update

February 2019 data