

Understanding Business Visits

Foresight – issue 178

VisitBritain Research
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Introduction

This edition of Foresight looks at the characteristics of the business visitors to the UK during 2019 and the main event type they were in the UK to attend.

This analysis comes from the International Passenger Survey (IPS) carried out by the Office for National Statistics (ONS) during 2016, 2018 and 2019.

Each year VisitBritain sponsors questions on this survey and during 2016, 2018 and 2019 we asked all those in the UK for business a little more about their main business meeting or event on the visit from which they were departing. Details can be found on page 24.

This report updates a previous Foresight reports on this topic but further information and interactive visualisations can be found on [the Business visits dedicated page of our corporate website](#).

As this is not a regular IPS question and there were some methodological changes between 2016 and 2018, please treat any trend data with caution.

All spend figures are nominal and exclude the price of getting to the UK but might include expenses outside of the business activity.

Regional data by business visit type only shows data for visits to a single nation or region, where sample size is significant enough. For example, the sample size for Northern Ireland is too small, so data for Northern Ireland is included in the UK-level data but cannot be displayed individually.

All shares of business visit types are calculated excluding 'Don't Know'.

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Executive summary (1/2)

- Business visits represented 21% of all inbound visits to the UK in 2019 contributing 8.7 million visits and £5.8 billion in spend (20% of all inbound spend in 2019). UK business visitors have a shorter length of stay but the average spend per night is much higher than the all-purpose average figure – making this a very valuable segment to the UK tourism industry.
- Business visits do not show seasonality generally seen in tourism flows which helps maintain a year round tourism offer.
- London leads by some distance on share of visits, nights and spend. The South East and West Midlands welcomed a share of 13% and 10% respectively of all business visits to the UK in 2019. And, after London, the South East saw the largest share of business spending, with 9% only though.
- The top 10 markets by volume generated 64% of all business visits to the UK in 2019 with 9 out of 10 countries being European showing the importance of our close neighbours. It was the non-European entry of the USA who holds top spot. When looking at the top 10 markets by spend the USA still holds top spot but is joined on the league table by India and China with Europe holding 7 of the top 10 value places.
- Business visits of 1-3 nights in duration are the most common length accounting for 62% of those in 2019, compared to 42% across all journey purposes.
- Business tourism includes all work related purposes and those who are coming to the UK in order to collect or deliver goods. In 2019, 21% of the inbound business visit were made by those driving a lorry.

Note: all shares of business visit types are calculated excluding 'Don't Know'

*Ranking based on markets for which business visits' sample size is over 30

Executive summary (2/2)

Business visits by type highlights:

- **MICE***: there were about 1.8 million business visits made for MICE in 2019, representing 20% of all inbound business visits. MICE accounted for just under a third (29%) of business all UK business visit spend, with visitors spending £1.7 billion in 2019. Among which:
 - **Meetings of 21+ people**: large meetings represented about 7% of all business visits in 2019 with 646,000 visits and those visitors spending £573 million.
 - **Incentive and team building****: the smallest business group in 2019 contributed 67,000 visits and £69 million in spend, being one of the business visit types spending the most per visit (excluding other) at £1,039.
 - **Conferences, conventions and congresses**: this category accounted for 742,000 visits and £716 million in spend, making it the top spending MICE sub-category.
 - **Exhibitions, events and trade shows**: attendees for this category spent £319 million across 319,000 visits in 2019.
- **Meetings of 1-5 people**: this was the largest meeting category in terms of volume 22% of business visits at 1.9 million visits and contributing £1.1 billion spend in 2019.
- **Meetings of 6-20 people**: this category accounted for 1.6 million visits and £1.2 billion spend making this the most valuable individual business category.
- **Training events and development**: this business category contributed 528,000 visits and a combined spend of £546 million.
- **Lorry drivers**: there were 1.9 million visits from lorry drivers in 2019, which accounted for 21%, of all business visits. However, when it comes to spend. Lorry drivers spent a combine £163 million, just 3% of all inbound business spend in 2019.

Note: all shares of business visit types are calculated excluding 'Don't Know'

*Meetings, Incentives, Conferences and Events, **Low sample size, results are indicative

Spotlight on MICE

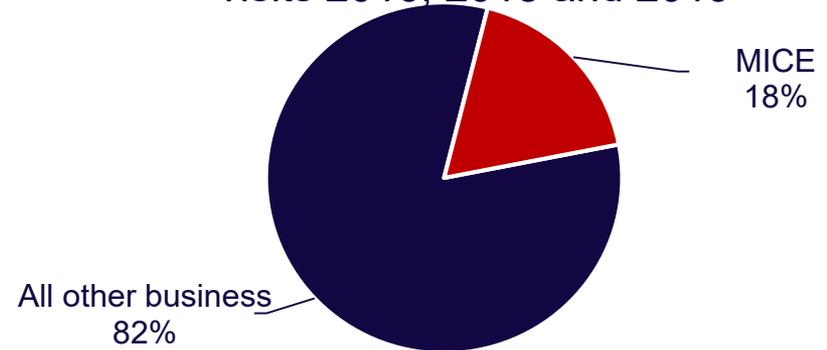
MICE – characteristics

There were 1.8 million inbound MICE business visits to the UK in 2019, who contributed a total of £1.7 billion to the UK economy. This is 20% of all inbound business visits and 29% of all UK business spend in 2019.

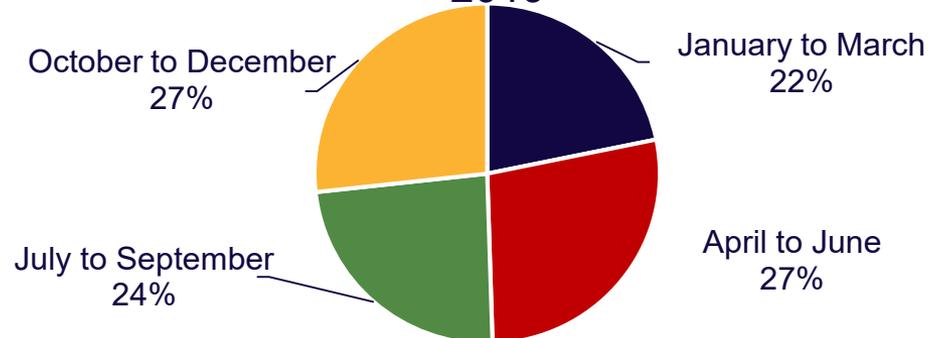
Across the 3 years for which we have data, MICE visits represented about 1 in 5 inbound business visits overall - 18% of all business visits (including those to more than one area). However the proportion has been increasing over time from 15% in 2016, to 18% in 2018 to 20% in 2019.

MICE visits are made throughout the year but peak in the typically shoulder tourist seasons of April-June and October to December.

MICE visits as a proportion of business visits 2016, 2018 and 2019



Seasonality by visits 2016, 2018 and 2019



MICE – key metrics

MICE (Meetings, Incentive, Conference and Events) is represented by inbound business visits attending a large meeting (21+ people), an Incentive/ Team building event (or leading on it), a Conference/ Convention/ Congress, or an Exhibition/ Event/ Trade show.

Inbound MICE data	2016	2018	2019
Visit (000)	1,425	1,602	1,774
Nights (000)	5,897	7,521	7,618
Spend (£m)	£1,479	£1,289	£1,678
Average Spend per Visit	£1,308	£805	£946
Average Nights per Visit	4.1	4.7	4.3
Average Spend per Night	£251	£171	£220
MICE % share of all business visits	15%	18%	20%

In 2019, the UK's inbound MICE market represented 1.8 million visits and was worth £1.7 billion to the economy. The MICE market increased across all measure compared to 2018 - though nights rose at a slower pace therefore the average length of stay fell slightly.

MICE visitors are valuable to the UK, especially compared to leisure visits. In 2019, the average spend per visit by a MICE visitor was 41% more than a leisure visitor (£671).

MICE – top 5 markets

Over the 3 years for which we have data, the top 5 markets have remained the same. The USA has continued to hold top spot, but the order of 2nd through to 5th has changed. Across 2016, 2018 and 2019 these 5 markets represent 44% of all MICE visits.

The top 5 spending MICE spending markets have changed over the 3 years for which we have data, but over the 3 year period the overall top 5 markets are similar to visits. These markets contributed 42% of the MICE spending in 2016, 2018 and 2019, though this figure somewhat hides the contribution of the USA – who individually contributed 22% across the 3 years.

Top 5 markets (Visits 000)	2016	2018	2019
USA	201	215	261
Germany	121	158	131
France	94	152	134
Irish Republic	118	100	131
Netherlands	72	109	125

Top 5 markets (Spend £m)	2016	2018	2019
USA	£347	£248	£389
Germany	£69	£102	£83
France	£58	£87	£85
Irish Republic	£131	£37	£53
India	£42	£71	£63

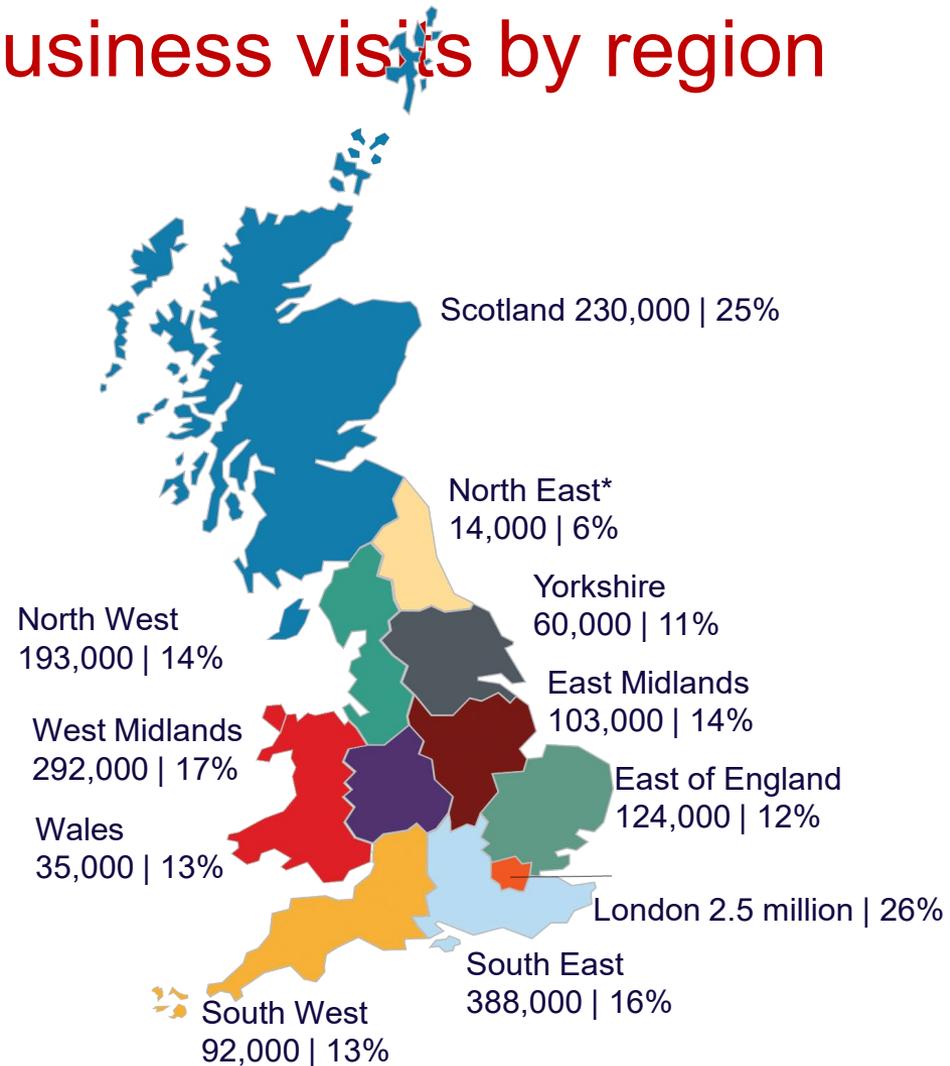
MICE – proportion of business visits by region

In the 3 years of 2016, 2018 and 2019 MICE visits represented just over a quarter of all business visits to London, and close to that share of business visits to Scotland.

Proportionally, MICE visits were also quite prominent among inbound business visits to the West Midlands (17%) and the South East (16%).

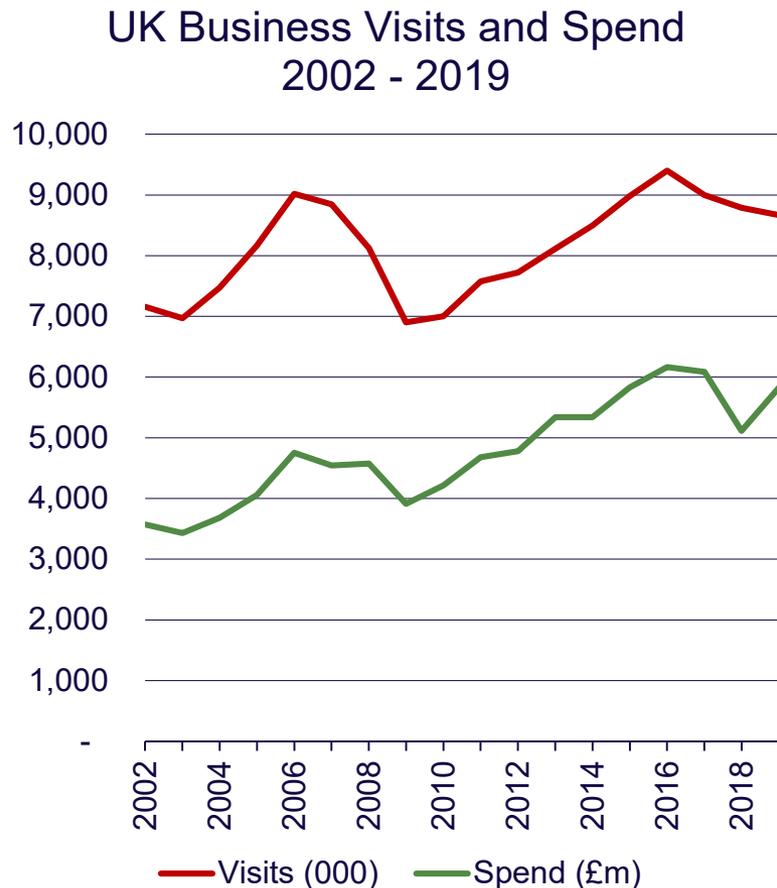
Of all the MICE visits to the UK, that only stayed in one region, London captured the lions share (60% of all UK MICE events over the three years). The South East (9%), West Midlands (7%) and Scotland (6%) also welcomed a share.

The numbers here show the number of MICE visits in the 3 years while the %s show what proportion of all business visits to the region were MICE.



Business visits characteristics

UK business visits and spend



In 2019 the UK welcomed 8.7 million business visits – continuing to slip down after the 2016 record. In 2019 business visits accounted for a little over 1 in every 5 visits to the UK (21%). This proportion has been decreasing over time from a high of 30% in 2002.

Business visitors spent a combined £5.8 billion in the UK during 2019, up 14% on relatively weak 2018 results. Business visit spending accounted for 20% of all inbound visitor spend to the UK in 2019.

Despite the recent slowdown in the last couple of years, in 2019 visits and spend were still well above the low point in 2009: +26% in visits and +49% in spend.

UK business visits – 2019 averages

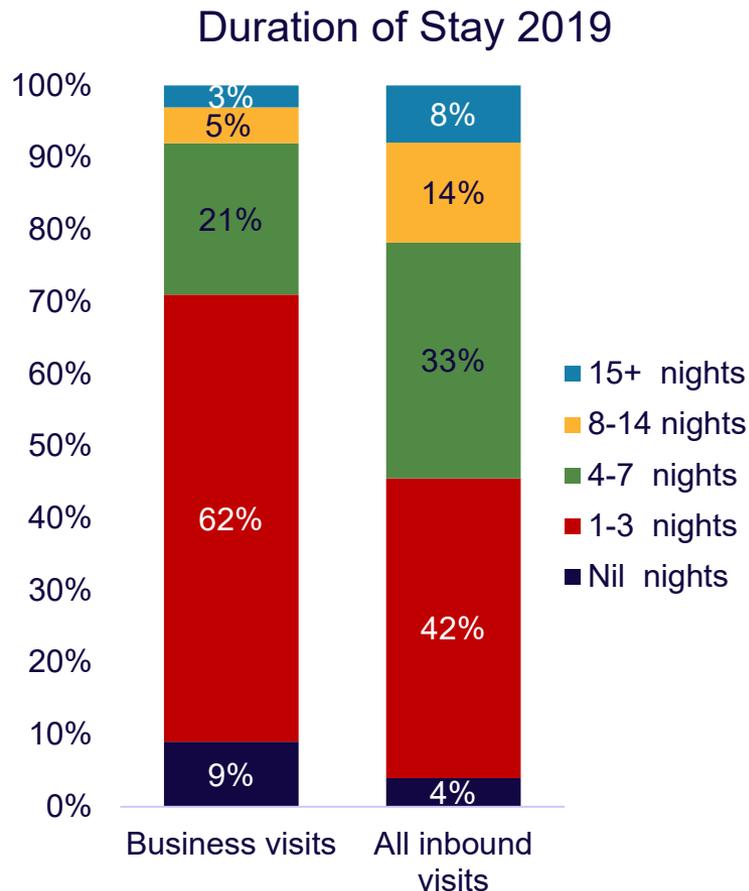
2019	Business	All journey purposes
Total Visits (000)	8,670	40,857
Total Nights (000)	36,267	289,628
Total Spend (£m)	£5,823	£28,448
Average Spend per Visit	£672	£696
Average Nights per Visit	4.2	7.1
Average Spend per Night	£161	£98

Business visits tend to be shorter than an average visit – in 2019 the average business visits was 4.2 nights, while the all journey purpose average was 7.1 nights. However, the average spend per night from a business visitor is £161; 63% more than the UK all purpose average.

Driven by the comparatively shorter stays, the average a business visitor to the UK in 2019 spent £672 during their stay, compared to £696 spent by visitors from all journey purposes.

While the average length of stay has remained fairly consistent over time, the average spend per visit in 2019 regained the ground lost in 2018, but not quite reaching the record of £676 set in 2017. It was the same for average spend per night with 2019 holding second – 2017 currently holds the record of £164.

UK business visits – duration of stay



As seen on the previous slide, the average length of stay tends to be shorter for business visitors, compared to the all-purpose average.

Indeed, visits lasting 1-3 nights are the most common length of stay for a business visit, accounting for 62% of those in 2019, compared to 42% across all journey purposes.

Longer stays of more than 2 weeks comprised just 3% of business visits in 2019, vs 8% for all purposes.

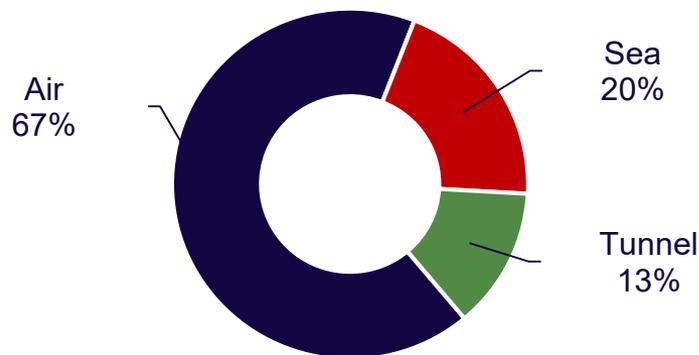
During 2019, almost 1 in 10 (9%) of business visits was classed as a day visit – with the visitor not staying any nights (vs. 4% for all inbound visits).

Business visits – port and mode

The vast majority of visitors to the UK arrive by air – that is through one of the UK’s many airports. Business visitors are no exception to this, with 67% arriving in the UK through an airport in 2019.

However, a higher proportion of business visitors arrive through a sea port than for other journey purposes – 20% vs 11% for all journey purposes in 2019. Arrivals through the tunnel in 2019 are about on par for business visits and all journey purposes (13% vs 10% respectively).

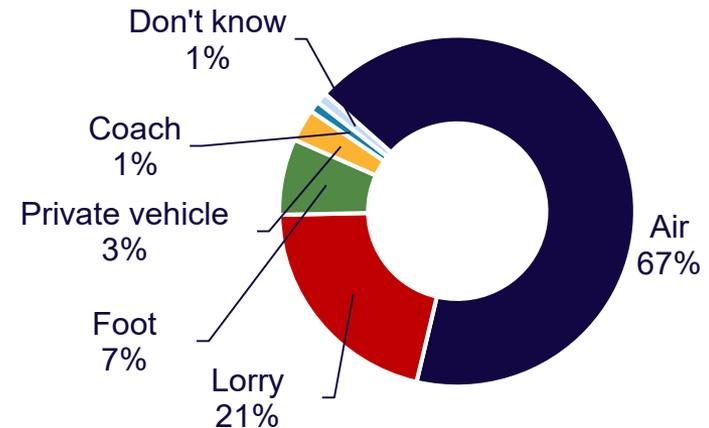
Port 2019



Base: Business visits: 7,140

Please note IPS data actually refers to departing port/mode rather than arrival

Mode of travel 2019

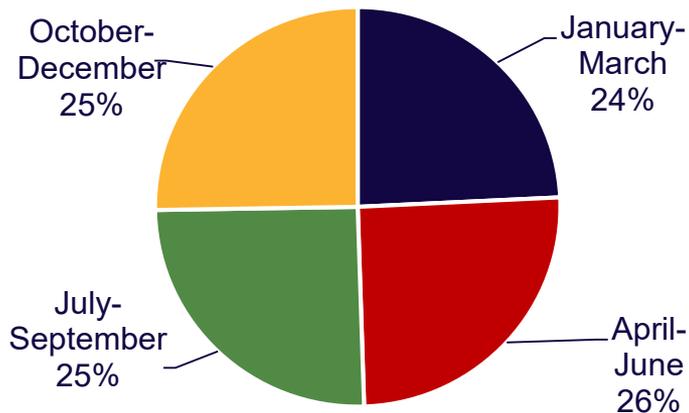


Business tourism is not just about activity in an office, conference centre or exhibition hall but includes all work related purposes and those who are coming to the UK in order to collect or deliver goods.

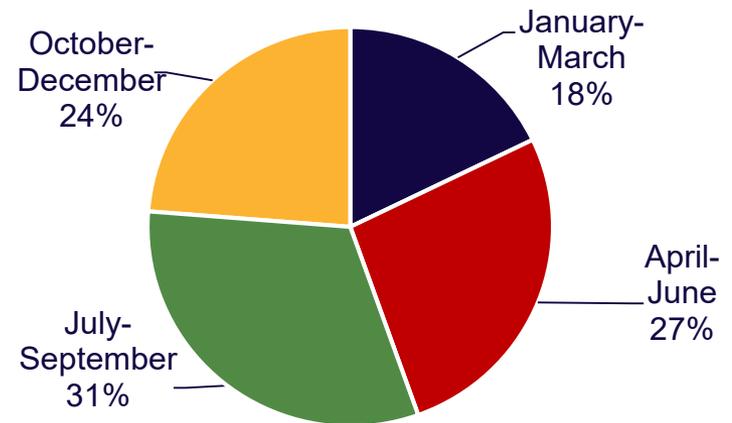
In fact, of all business visits in 2019, 21% were made by those driving a lorry. This percentage increases to 65% of the business visits that arrive by sea and tunnel.

Business visits – seasonality

Business visits 2019



Holiday visits 2019



Business visits do not show the seasonality generally seen in inbound tourism flows, with visits almost evenly spread throughout 2019.

In comparison, 31% of holiday visits, took place in July-September 2019. For the UK tourism industry business travel helps to maintain a year round tourism offer.

Base: Business visits: 7,140; Holiday visits: 12,513

Business visits - Regional Distribution

London leads by some distance on share of visits, nights and spend. Visits including an overnight stop in the South East and the West Midlands both received 13% and 10% (respectively) of all business visits to the UK in 2019. The South East saw the largest share of business spending outside of London, though with only 9%. Business trend data is available on the regional data section of our website: <https://www.visitbritain.org/nation-region-county-data>



Region	Visits (000)	UK visits share (%)	Spend (£m)	UK spend share (%)	Nights (000)	UK night share (%)
Scotland	371	4%	£308	5%	2,069	6%
Wales	156	2%	£72	1%	785	2%
London	3,984	46%	£3,631	64%	16,614	46%
North East*	95	1%	£36	1%	368	1%
North West	700	8%	£275	5%	2,683	7%
Yorkshire	258	3%	£94	2%	868	2%
West Midlands	877	10%	£361	6%	3,992	11%
East Midlands	343	4%	£81	1%	852	2%
East Of England	430	5%	£187	3%	2,054	6%
South West	339	4%	£139	2%	1,601	4%
South East	1,104	13%	£523	9%	4,335	12%

Base: Scotland (258), Wales (145), London (3,314), North East (72), North West (493), Yorkshire (180), West Midlands (561), East Midlands (189), East of England (262), South West (312), South East (850). *low sample

Share of business vs. other purposes

36% of inbound visits to the West Midlands in 2019 and 28% of visits to the East Midlands were for business. The North West and South East both reported 20% of their inbound visits were for business. By comparison, only 11% of visits to Scotland, 13% of visits to the South West and 15% of visits to Wales were for business in 2019.

Region	Holiday	Business	VFR	Study	Other
Scotland	61%	11%	25%	2%	2%
Wales	39%	15%	42%	1%	3%
London	51%	18%	24%	1%	5%
North East	32%	18%	42%	2%	6%
North West	34%	20%	34%	2%	10%
Yorkshire	33%	19%	42%	2%	3%
West Midlands	24%	36%	36%	1%	3%
East Midlands	22%	28%	46%	1%	3%
East of England	27%	19%	47%	3%	4%
South West	44%	13%	37%	3%	3%
South East	33%	20%	39%	3%	5%
Total UK	41%	21%	30%	1%	6%



Base: Scotland (2,544), Wales (926), London (15,079), North East (411), North West (2,595), Yorkshire (1,043), West Midlands (1,699), East Midlands (776), East of England (1,340), South West (2,406), South East (3,634), Total UK (28,519).

Activities undertaken by business visitors

Not surprisingly, business visitors undertook activities at a lower rate than the average while in the UK.

That said, business visitors still found time to do some activities while in the UK. The top 4 activities (in terms of participation rates) were all about 'Experiencing City Life', including:

- Dining in restaurants (49%)
- Going to the pub (24%)
- Going shopping (23%)
- Socialising with the locals (15%)

Fifth place was awarded to 'Sightseeing famous monuments or buildings' where 15% of the business visitors said they saw a famous monument of building.

Business visitors from New Zealand, Canada and Australia were more likely on average to participate in most of these top 5 activities alongside their business events when in the UK.

For more data on the propensity of business visitors to participate in selected activities while in the UK, download the data available at the bottom of our [business visits and events webpage](#).

Business Visits Top 10

Top 10 business markets in 2019

By business visits and share of all business visits

The top 10 markets generated 64% of all business visits to the UK in 2019 and include just one long haul market.

The importance of our location and proximity to Europe is notable here, with 9 of the 10 top business markets in 2019 being European. The 2018 results also showed this pattern.

Inbound business tourism is not all about activity taking place in an office, conference centre or exhibition hall. Business visits includes those in the UK to collect or deliver goods. Lorry Drivers are particularly prominent amongst business visitors from Romania (81%) and Poland (79%), were 8 out of 10 of the business visits in 2019 were made by a lorry driver.

The average length of stay for these top ten markets ranges from 6.3 to 1.7 compared to the overall UK business average of 4.2 nights in 2019 – across all journey purposes was 7.1 nights.

Market	Visits (000)	% share	Average length of stay
USA	808	9%	4.9
Poland	743	9%	3.0
France	726	8%	2.9
Germany	720	8%	3.8
Irish Republic	606	7%	2.0
Netherlands	546	6%	2.2
Romania	442	5%	6.3
Italy	379	4%	4.6
Spain	343	4%	3.6
Belgium	272	3%	1.7

Top 10 business markets in 2019

By business spend and share of all business spending

When looking at the 2019 top 10 markets in terms of value, European markets still make up most of the list with 7 out of 10 inbound markets. The long haul markets of the USA, India and China make up the top 10.

The top 10 markets accounted for 54% of all inbound business spending in the UK in 2019 – a similar proportion seen in 2018.

The total value of the USA business visitors is noticeable on this league table – contributing over £1 billion and 18% of all inbound business spend in 2019. However looking at spend per visit, USA slips from the top spot (on this table) into 3rd with China taking 1st place and India just claiming 2nd.

Poland ranks in 9th place on this value table, but holds 2nd spot in terms of volume – the results can be seen in the average spend per visits. On average a Polish business visitor spend £225 vs. the UK business average of £672.

Market	Spend (£m)	% share	Average spend per visit
USA	£1,060	18%	£1,312
Germany	£372	6%	£517
France	£299	5%	£412
India	£238	4%	£1,388
Irish Republic	£220	4%	£364
China	£212	4%	£1,879
Italy	£210	4%	£554
Netherlands	£204	4%	£374
Poland	£167	3%	£225
Romania	£161	3%	£365

Business visits by type summary

Business visits in more detail

While we have an understanding of the main purpose visitors are in the UK for each year, VisitBritain sought to understand more about the types of business meeting or event visitors were attending in 2016, 2018 and 2019.

Understanding business visits at this level is important as the needs of different visitors can vary greatly. A small meeting may be held in an office meeting room while a larger conference may require provisions of accommodation, catering, breakout space, transport and after hours entertainment.

Most inbound visitors coming to the UK for business in 2016, 2018 and 2019 were asked a follow up question to capture the main reason for their business trip. Lorry drivers were mostly dealt with separately; we asked the others about the following categories:

- Meeting 1-5 people
- Meeting 6-20 people
- Meeting 21+ people
- Incentive/Team building
- Conference/Convention/Congress
- Exhibition/Event/Trade show
- Training/Development
- Lorry Drivers
- Other/Don't Know

We would group Meeting 21+ people, Incentive/Team building, Conference/Convention/Congress, and Exhibition/Event/Trade show as Meetings, Incentive, Conferences and Events (MICE).

Business visit types in 2016

Business visit type	Visits (000)	Visits (% Share)	Nights (000)	Nights (% Share)	Spend (£m)	Spend (% Share)
Meeting 1-5 people	1,895	20%	5,250	13%	£1,143	19%
Meeting 6-20 people	1,769	19%	5,752	14%	£1,502	24%
TOTAL MICE	1,425	15%	5,897	15%	£1,479	24%
<i>Meeting 21+ people</i>	<i>531</i>	<i>6%</i>	<i>2,096</i>	<i>5%</i>	<i>£575</i>	<i>9%</i>
<i>Incentive*</i>	<i>72</i>	<i>1%</i>	<i>349</i>	<i>1%</i>	<i>£84</i>	<i>1%</i>
<i>Conference</i>	<i>609</i>	<i>6%</i>	<i>2,608</i>	<i>7%</i>	<i>£607</i>	<i>10%</i>
<i>Exhibition</i>	<i>213</i>	<i>2%</i>	<i>845</i>	<i>2%</i>	<i>£213</i>	<i>3%</i>
Training/Development	376	4%	3,165	8%	£419	7%
Lorry driving	2,169	23%	4,574	11%	£67	1%
Other	1,189	13%	10,688	27%	£1,076	17%
Don't Know	575	6%	4,616	12%	£480	8%
ALL BUSINESS VISITS	9,399		39,942		£6,166	

The most common business visit type in 2016 was Lorry driver accounting for nearly 1 in every 4 visits. Despite holding this title lorry drivers contributed just 1% of all business spend in 2016. This is contrast to most other business visit types that have roughly the same share across the 3 measures – visits, night and spend.

Small to medium side meetings (up to 20 people) accounted for 39% of all visits in 2016, and 43% of all inbound visitor spend. 13% of all business visits were for 'other reasons' this year, but these tend to have a relatively long length of stay of 9.0 nights (nights/visits).

Base: Meeting 1-5 (2,141), Meeting 6-20 (2,180), MICE (1,767), Meeting 21+ (665), Incentive (84), Conference (770), Exhibition (248), Training (438), Lorry (1,414), Other (1,351), Don't Know (608). *low sample

Business visit types in 2018

Business visit type	Visits (000)	Visits (% Share)	Nights (000)	Nights (% Share)	Spend (£m)	Spend (% Share)
Meeting 1-5 people	2,090	24%	6,223	17%	£1,138	22%
Meeting 6-20 people	1,544	18%	5,110	14%	£1,114	22%
TOTAL MICE	1,602	18%	7,521	21%	£1,289	25%
<i>Meeting 21+ people</i>	<i>511</i>	<i>6%</i>	<i>2,354</i>	<i>6%</i>	<i>£406</i>	<i>8%</i>
<i>Incentive*</i>	<i>78</i>	<i>1%</i>	<i>698</i>	<i>2%</i>	<i>£68</i>	<i>1%</i>
<i>Conference</i>	<i>632</i>	<i>7%</i>	<i>2,741</i>	<i>7%</i>	<i>£483</i>	<i>9%</i>
<i>Exhibition</i>	<i>381</i>	<i>4%</i>	<i>1,728</i>	<i>5%</i>	<i>£332</i>	<i>6%</i>
Training/Development	538	6%	3,688	10%	£516	10%
Lorry driving	1,854	21%	4,055	11%	£169	3%
Other	933	11%	9,030	25%	£730	14%
Don't Know	228	3%	1,040	3%	£158	3%
ALL BUSINESS VISITS	8,789		36,666		£5,115	

The most common business visit type in 2018 was for a small meeting attended by no more than 5 people – 1 in 4 visits were for a small meeting. There were 1.9 million visits made by lorry drivers in 2018, the second most common business sub-category.

There were 1.5 million business visits in the UK in 2018 for attending a medium sized meetings (6-20 people) – a similar proportion to those in the UK for a MICE event (1.6 million visits).

Training/Development drew 538,000 visits to the UK in 2018 (6%) but contributed 10% of all business spend.

Base: Meeting 1-5 (1,829), Meeting 6-20 (1,463), MICE (1,420), Meeting 21+ (482), Incentive (67), Conference (581), Exhibition (290), Training (459), Lorry (1,100), Other (769), Don't Know (163). *low sample

Business visit types in 2019

Business visit type	Visits (000)	Visits (% Share)	Nights (000)	Nights (% Share)	Spend (£m)	Spend (% Share)
Meeting 1-5 people	1,881	22%	5,121	14%	£1,126	19%
Meeting 6-20 people	1,550	18%	5,149	14%	£1,201	21%
TOTAL MICE	1,774	20%	7,618	21%	£1,678	29%
<i>Meeting 21+ people</i>	646	7%	2,378	7%	£573	10%
<i>Incentive*</i>	67	1%	685	2%	£69	1%
<i>Conference</i>	742	9%	3,193	9%	£716	12%
<i>Exhibition</i>	319	4%	1,363	4%	£319	5%
Training/Development	528	6%	3,613	10%	£546	9%
Lorry driving	1,851	21%	3,629	10%	£163	3%
Other	888	10%	10,331	28%	£960	16%
Don't Know	198	2%	806	2%	£151	3%
ALL BUSINESS VISITS	8,670		36,267		£5,823	

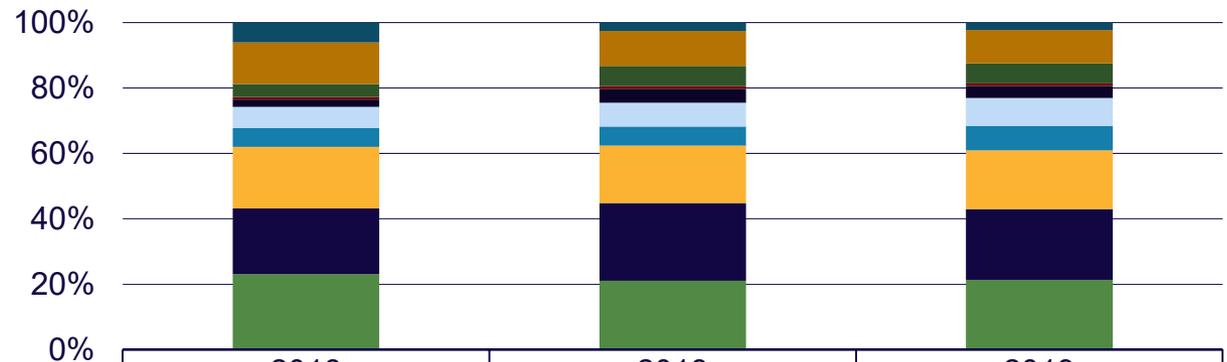
The most common business visit type in 2018 was for a small meeting attended by no more than 5 people, followed closely by lorry drivers and medium sized meetings (6-20 people). Together these 3 business visit types accounted for 61% of all business visits but only 43% of spend (due to the relatively low spend by lorry drivers).

20% of the business visits in 2019 were MICE. There were 1.8 million MICE visits in the UK in 2019 – the highest across the 3 years we have data for. MICE spending also reached record levels in 2019 (compared to 2016 and 2018) with £1.7 billion.

Base: Meeting 1-5 (1,675), Meeting 6-20 (1,467), MICE (1,628), Meeting 21+ (604), Incentive (70), Conference (668), Exhibition (286), Training (464), Lorry (1,046), Other (747), Don't Know (113). *low sample

UK business visits share by type

UK Business Visits share by type 2016, 2018 and 2019



	2016	2018	2019
■ Don't Know	6%	3%	2%
■ Other	13%	11%	10%
■ Training/Development	4%	6%	6%
■ Incentive/Team Building	1%	1%	1%
■ Exhibition/Event/Trade Show	2%	4%	4%
■ Conference/Convention/Congress	6%	7%	9%
■ Meeting 21+ people	6%	6%	7%
■ Meeting 6-20 people	19%	18%	18%
■ Meeting 1-5 people	20%	24%	22%
■ Lorry driving	23%	21%	21%

Business visits by type

Lorry drivers contributed one-in-five business visits in 2019 – the same proportion in 2018, but slightly lower than in 2016.

Small meetings of less than 5 people peaked at 24% in 2018, reducing to 22% of all inbound UK business visits in 2019.

Visits for medium sized meetings (6-20 people) maintained the 18% share from 2018 in 2019 – a small decrease from 2016 results (19%).

The 4th biggest category 'Other' has seen a share decline across the 3 years we have data, holding a 10% share in 2019 (down from 13% in 2016).

Visits for Training/Development purposes grew 2pp in market share to 6% in 2018 compared to 2016, which remained at 6% in 2019.

The MICE segment share has increased in the last 4 years, from 15% in 2016 to 21% in 2019 (18% in 2018). Within this, all individual business types have held or grown their share. Large meetings (21+ people) increased from 6% to 7%, Incentive/Team Building held at 1% share, visits for Conferences, Conventions or Congress improved each year from 6% in 2016 to 7% in 2018 and finally 9% in 2019. Whilst exhibitions, events or trade share doubled from 2% in 2016 to 4% in 2018 and 2019.

Business visit type in detail

Meetings of 1-5 people - 2019

Small meetings was the largest meeting category, accounting for 22% of business visits (1.9 million visits) in 2019.

Visitors in the UK for a small meetings spent £1.1 billion in 2019 – 19% of all inbound visitor spending.

In terms of visits, the top 5 markets contributed 50% of the visits; and the top 5 by value accounted for 42% of the spend in this category. Though the USA contributed 18% on its own.

The seasonality of small meetings is weighted towards the second half of the year with October to December the most popular (Q4) in 2019.

Just over a fifth of those in the UK on business to attend a small meeting in 2019 were female (22%).

Seasonality by visits

Q1 23%	Q2 24%	Q3 26%	Q4 27%
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Top 5 markets by volume	Visits (000)	Top 5 markets by value	Spend (£m)
France	233	USA	£206
Germany	204	Germany	£98
USA	201	France	£76
Irish Republic	166	China	£47
Netherlands	135	Irish Republic	£44

Averages	2019
£ per visit	£599
£ per night	£220
Length of stay (nights)	2.7

Meetings of 6-20 people - 2019

Medium sized meetings represented 18% of business visits in 2019, accounting for 1.6 million visits.

Visitors attending these meetings spent £1.2 billion in 2019 – making medium business meetings the most valuable business category.

The top 5 markets by volume contributed half of all the visits, and almost half (49%) of spend in this category. Similar to what was seen in the small meeting type, the USA contributed the lions share here – accounting for 25% of all spend.

27% of medium sized meetings were in the first quarter (January – March).

The majority of those in the UK on business to attend a medium sized meeting in 2019 were male – though females did make up nearly a quarter (24%).

Seasonality by visits

Q1 27%	Q2 23%	Q3 25%	Q4 25%
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Top 5 markets by volume	Visits (000)	Top 5 markets by value	Spend (£m)
USA	206	USA	£295
Germany	189	India	£105
France	169	Germany	£76
Irish Republic	115	France	£71
Netherlands	102	Australia	£47

Averages	2019
£ per visit	£775
£ per night	£233
Length of stay (nights)	3.3

Large meetings of 21+ people - 2019

Large meetings accounted for 7% of business visits in 2019 with 646,000 visits. Visitors attending these large meetings spent a total of £573 million in 2019 – the highest spend per night of all the business types.

The top 5 markets by both volume and value contributed 46% of the visits and spend of this business visit type. Of note is the USA delegates who spent more than 4x than second placed, France.

28% of the large meetings were held during each of the second and last quarter of 2019.

4 of the top 5 volume generating markets are visiting from Europe, 3 out of the top 5 in value.

29% of large meeting attendees were female in 2019.

Seasonality by visits

Q1 21%	Q2 28%	Q3 23%	Q4 28%
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Top 5 markets by volume	Visits (000)	Top 5 markets by value	Spend (£m)
USA	96	USA	£149
Germany	56	France	£33
Irish Republic	55	China	£30
France	44	Germany	£28
Netherlands	43	Irish Republic	£24

Averages	2019
£ per visit	£887
£ per night	£241
Length of stay (nights)	3.7

Incentive and team building - 2019

Incentive and team building was the smallest business group in 2019 – in terms of visits and spend. In total business visits for these purposes accounted for approximately 67,000 visits and £69 million in spend.

38% of the incentive visits in 2019 were during October to December. Q4 is traditionally considered a shoulder season to the main tourist season and although niche, these visits do help spread the UK tourism season throughout the year.

35% of the team building and incentive visits were made by females and the majority (75%) of all visitors were between the ages of 25 and 44 years of age in 2019.

With each visit averaging at little over £1,000, this is the highest average spend per visit of the categories (excluding other) we are looking at in this report.

Those on a team building or an incentive trip stayed close to 10 nights, similar to the 'Other' category.

Seasonality by visits



Averages	2019
£ per visit	£1,039
£ per night	£101
Length of stay (nights)	10.3

Conferences, conventions and congresses - 2019

There were 742,000 visits for conferences in 2019, spending £716 million.

The top 5 markets by volume contributed 42% of visits and the same proportion of spend for this business category

As seen in the previous business categories, the value of the USA leads by some distance – at £164 million this is 23% of the total spend in this category.

The winter months (January – March) are the quietest quarter for attending conferences in the UK, whilst April – June was the most popular season for this type of visits.

35% of visitors in the UK in 2019 to attend a conference were female.

Seasonality by visits

Q1 17%	Q2 31%	Q3 26%	Q4 26%
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Top 5 markets by volume	Visits (000)	Top 5 markets by value	Spend (£m)
USA	106	USA	£164
Irish Republic	57	Netherlands	£45
Netherlands	53	France	£37
France	53	Germany	£28
Germany	47	India	£28

Averages	2019
£ per visit	£964
£ per night	£224
Length of stay (nights)	4.3

Exhibitions, events and trade shows - 2019

Attendees to exhibitions, events or trade shows spent £319 million across 319,000 visits in 2019. In terms of the entire business sector, this represents 4% of all visits and 5% of spend in 2019.

The majority (55%) of exhibitions and trade shows were held in the second half of 2019, with about 3-in-10 such visits taking place between October and December. So although a traditionally smaller category of business tourism these types of visitors can help extend the traditionally peak tourism 'summer' quarter.

Around a quarter (23%) the exhibitions, events and trade show visits were made by females and the majority (59%) of all visitors were between the ages of 35 and 54 years of age in 2019.

With each visit averaging £1,000, this is the third highest average spend of the categories (excluding other) we are looking at in this report.

Visitors in the UK for an exhibition stayed an average of 4.3 nights, which is in line with the UK average across all business categories (4.2 nights).

Seasonality by visits

Q1	Q2	Q3	Q4
20%	26%	27%	28%

Averages	2019
£ per visit	£1,000
£ per night	£234
Length of stay (nights)	4.3

Training events and development - 2019

Training and development includes visitors both receiving training and those who were in the UK to host a training session.

This business category contributed 528,000 visits and a combined spend of £546 million in 2019.

The top 5 markets by volume contributed 39% of the visits and the same proportion of spend. Of note here is that the USA doesn't hold pole position on the value table.

By quarter, training events take place throughout the year, in roughly equal proportions across each of the 4 quarters in 2019.

The gender split for these events is the most equal of the business categories – 41% were female in 2019.

Base: Training Event and Development (464), sample size at market level vary and may be low, results are thus indicative

Seasonality by visits

Q1 25%	Q2 25%	Q3 26%	Q4 24%
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Top 5 markets by volume	Visits (000)	Top 5 markets by value	Spend (£m)
Germany	52	China	£50
France	43	Poland	£49
Irish Republic	40	USA	£42
USA	38	Norway	£40
Belgium	35	Germany	£31

Averages	2019
£ per visit	£1,035
£ per night	£151
Length of stay (nights)	6.8

Lorry drivers - 2019

Lorry drivers accounted for one in five (21%) of the business visits made from overseas to the UK in 2019. However, they contributed only 3% of all business spending with the lowest average length of stay and spend per night of all business visit types in 2019.

This category contributed 1.9 million inbound visits and a combined spend of £163 million in 2019.

The dominance of Poland and Romania amongst Lorry Drivers is stark here. Half of all visits (51%) and almost half (47%) of the Lorry driver spending in 2019 were from these 2 markets.

Due to the UK's proximity to Europe and ease of access, virtually all lorry drivers came from Europe in 2019, with only a few arriving from Africa.

Seasonality by visits

Q1	Q2	Q3	Q4
30%	24%	24%	22%

Top 5 markets by volume	Visits (000)	Top 5 markets by value	Spend (£m)
Poland	588	Poland	£51
Romania	357	Romania	£26
Bulgaria	92	Spain	£14
Czech Republic	83	Lithuania	£11
Lithuania	83	Bulgaria	£10

Averages	2019
£ per visit	£88
£ per night	£45
Length of stay (nights)	2.0

Business visit type by region

Business visit share by type and area in Britain

Nation/region	Meeting 1-5	Meeting 6-20	Meeting 21+	Incentive	Conference	Exhibition	Training	Lorry	Other	MICE
Scotland	25%	23%	6%	1%	14%	5%	10%	7%	9%	26%
Wales	13%	15%	4%	1%	7%	1%	9%	25%	25%	13%
London	28%	23%	9%	1%	11%	5%	6%	5%	11%	26%
North West	19%	15%	5%	1%	7%	2%	5%	35%	11%	15%
North East	19%	20%	1%	1%	4%	<1%	6%	35%	13%	6%
Yorkshire	16%	14%	7%	<1%	3%	1%	6%	34%	17%	12%
West Midlands	11%	13%	4%	<1%	6%	6%	5%	43%	11%	17%
East Midlands	8%	14%	6%	1%	5%	3%	5%	50%	9%	14%
East of England	15%	14%	3%	1%	8%	1%	6%	39%	13%	12%
South West	14%	17%	5%	<1%	5%	2%	7%	34%	14%	13%
South East	18%	18%	7%	1%	6%	2%	8%	27%	12%	16%
Total UK	22%	20%	7%	1%	9%	4%	7%	19%	12%	21%

London and Scotland both over index for small and medium-size meetings, as well as conferences and exhibitions, compared to the UK average overall. However, both received the smallest share of visits by lorry drivers. Wales receives a larger share of visits for training than the UK average, as does Scotland. The East Midlands was popular for Lorry Drivers than the average. The share of business visitors going to exhibitions is higher in West Midlands than for the UK overall.

Base in 2016/2018/2019: Scotland (657), Wales (317), London (9,438), North West (1,245), North East (169), Yorkshire (454), West Midlands (1,344), East Midlands (511), East of England (744), South West (800), South East (2,218), Total UK (18,493). Data here shows those who only stayed in one region while in the UK. Shares excluding "Don't know". NB sample size is small for some regions so results are indicative.

Business spend share by type and area in Britain

Nation/region	Meeting 1-5	Meeting 6-20	Meeting 21+	Incentive	Conference	Exhibition	Training	Lorry	Other	MICE
Scotland	18%	26%	8%	1%	17%	7%	11%	1%	10%	34%
Wales	12%	14%	5%	1%	9%	1%	25%	2%	33%	15%
London	23%	24%	12%	1%	13%	6%	7%	<1%	14%	32%
North West	21%	22%	6%	1%	11%	4%	11%	5%	19%	22%
North East	13%	22%	1%	1%	3%	<1%	32%	2%	28%	4%
Yorkshire	16%	13%	11%	<1%	5%	4%	17%	4%	30%	20%
West Midlands	11%	16%	7%	<1%	10%	11%	10%	4%	30%	28%
East Midlands	11%	18%	12%	1%	9%	6%	24%	4%	15%	28%
East of England	17%	22%	5%	1%	11%	1%	20%	5%	17%	18%
South West	19%	26%	8%	1%	8%	3%	10%	3%	20%	21%
South East	21%	22%	11%	1%	7%	4%	16%	3%	15%	24%
Total UK	21%	23%	10%	1%	12%	6%	10%	1%	16%	29%

Meetings of up to 20 people comprised almost half (47%) of inbound spend on business visits to London. Medium-size meetings (6-20 people) were 26% of inbound business spend in Scotland and the South West. Spend on large meetings over-indexed in London and the East Midlands. Spend share for Exhibitions was higher in Scotland and the West Midlands than in UK average. Spend share for MICE was higher than the Total UK average in Scotland and London.

Base in 2016/2018/2019: Scotland (657), Wales (317), London (9,438), North West (1,245), North East (169), Yorkshire (454), West Midlands (1,344), East Midlands (511), East of England (744), South West (800), South East (2,218), Total UK (18,493). Data here shows those who only stayed in one region while in the UK. Shares excluding "Don't know". NB sample size is small for some regions so results are indicative.

Business night share by type and area in Britain

Nation/region	Meeting 1-5	Meeting 6-20	Meeting 21+	Incentive	Conference	Exhibition	Training	Lorry	Other	MICE
Scotland	15%	22%	5%	5%	15%	12%	7%	4%	17%	36%
Wales	12%	7%	3%	<1%	5%	1%	19%	9%	44%	9%
London	21%	21%	9%	1%	11%	5%	10%	2%	20%	26%
North West	12%	13%	4%	1%	7%	2%	13%	19%	31%	13%
North East	8%	14%	1%	<1%	1%	<1%	10%	11%	55%	2%
Yorkshire	10%	10%	13%	<1%	2%	1%	14%	16%	34%	17%
West Midlands	7%	10%	3%	<1%	6%	7%	8%	19%	39%	17%
East Midlands	7%	10%	8%	1%	5%	4%	16%	25%	24%	19%
East of England	11%	12%	3%	<1%	7%	1%	14%	16%	36%	10%
South West	10%	15%	5%	<1%	5%	1%	9%	14%	41%	11%
South East	14%	20%	7%	1%	7%	3%	13%	13%	22%	18%
Total UK	16%	17%	7%	1%	9%	4%	11%	9%	26%	21%

Over a third of the nights spent in Scotland by inbound business visitors were for a MICE business event. In Wales, nights spent by those visiting for training over indexed vs. the UK share (19% vs 11%). The Other category also over indexed in the North East, the South West, Wales and the West Midlands. About 1 in 5 nights spent in London was for a small meeting, and night shares for conferences, medium and large meetings all over-indexed on the UK averages. Large meetings (21+ people) accounted for a larger night share in the East Midlands and Yorkshire.

Base in 2016/2018/2019: Scotland (657), Wales (317), London (9,438), North West (1,245), North East (169), Yorkshire (454), West Midlands (1,344), East Midlands (511), East of England (744), South West (800), South East (2,218), Total UK (18,493). Data here shows those who only stayed in one region while in the UK. Shares excluding "Don't know". NB sample size is small for some regions so results are indicative.

Other resources

Other resources

VisitBritain's Business events team focuses on the MICE sector, Meetings, Incentive, Conferences and Events. In this report, we provide an estimate of visits for this type of business visits.

As part of the Discover England Fund, additional research have been completed to further understand the decision making process of event organisers and decision makers when selecting a meeting or conference location as well as awareness and consideration of British cities. You can [read our research about motivations and barriers \(in PDF\) on our website.](#)

An [additional report is also available on delegate expenditure and business extenders](#) (delegates who extend their trip for leisure).

And [another report looks at the China MICE Market.](#) It provides key insights to understand the characteristics of the Chinese meetings and incentives market.

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