

Inbound Tourism Trends Quarterly Quarter 1 2020

August 2020

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About this data

This quarterly update presents the latest quarterly from the International Passenger Survey (IPS) released by the Office for National Statistics (ONS).

This data (January – March 2020) was released on 24th July 2020. It provides data on visits by market and UK region visited up to Q1 2020. IPS interviewing was suspended in on 16th March due to COVID-19; the results for the second half of March were modelled by the ONS using assumptions about passenger characteristics. National Statistics status has therefore been suspended for the March and Q1 results, and the numbers should be treated with caution. No dates have yet been set for future releases of the IPS.

When available the Inbound research & insights section of the VisitBritain website will contain much more detail including on visits to UK regions.

The data is based on interviews with a sample of departing visitors. The number interviewed varies but is typically around 3,000 per month. Please note that sample sizes at the quarterly level for some markets and UK regions can be low and results should be treated with caution, especially for spending.

Please 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 percentage changes in spend are nominal

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

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Global context

These slides put the UK's performance in the context of global tourism trends, the economic outlook and the exchange rate.

Global view

According to UNWTO estimates, there were 1.5 billion international overnight tourism arrivals during 2019, up 3.6% on 2018. However, 2020 arrivals are forecast to fall by 56%.

Visits to Europe overall in 2020 Jan-May are down 58% and visits to the EU also by 58%. Within Europe, there is variation with Northern Europe (including the UK) down 54%, Western Europe down 52%, Central/Eastern Europe down 54% and Southern Europe down 66%.

Globally, the lowest decline in visits during 2020 is in Africa, where arrivals are down 47%, followed by the Americas with -48% and the Middle East with -52%. Visits to Asia Pacific are down by the highest rate of 60%.

International tourist arrivals in Q1 (Jan-Mar) 2020 overall decreased 23% on 2019 with inbound visits to Europe down 18%.



International tourist arrivals by destination (in millions) and year-on-year changes (%)

Destination continents	2019 arrivals	2020 arrivals growth (Jan-May)*	Change for Q1 2020 vs Q1 2019*
World	1,460	-56%	-23%
Europe	745	-58%	-18%
Asia Pacific	361	-60%	-35%
Americas	220	-48%	-16%
Africa	73	-47%	-14%
Middle East	61	-52%	-20%

Source: UNWTO, July 2020. *Estimates

Economic outlook

Summary: the coronavirus has triggered an unprecedented short-term contraction across the global economy. Recovery prospects are highly uncertain. Forecasts suggest a return to pre-COVID GDP levels in 1-2 years, but this depends on the progress of the virus and on the extent of long-term economic damage caused by lockdowns and ongoing social distancing.

Eurozone: severe economic damage was caused by lockdowns in April, but data shows that activity started to recover in May as quarantines were lifted, and looking forward indicators continue to improve. Recovery will be uneven across the region but the EZ is expected to contract 7.9% this year before 6.1% growth in 2021.

USA: following a dramatic near 20% plunge in activity in March and April, consumer spending and business investment have experienced a faster-than-expected rebound. A strong first phase of recovery shows only a contraction of 4.2% for 2020 but a slower second phase of recovery means that 2021 forecasts show only 3.9% growth.

Chia: in 2020, GDP is expected to grow by 2.5%; although better than other major economies, it is still much lower than the recent norm. Industrial value added and investment grew in April 2020 and continued to June 2020, suggesting recovery is underway.

India: 2020 growth is expected to fall to -5.7% with the reopening of the economy to stimulate recovery in June and growth of 10.8% in 2021.

GDP growth	2019	2020	2021
Australia	1.8%	-4.3%	3.2%
Canada	1.7%	-7.2%	7.3%
France	1.5%	-9.8%	7.9%
Germany	0.6%	-6.1%	5.2%
Ireland	5.6%	-4.8%	7.9%
Italy	0.3%	-9.3%	5.7%
Netherlands	1.6%	-4.7%	3.8%
Poland	4.2%	-3.5%	5.8%
Spain	2.0%	-10.6%	7.6%
Sweden	1.2%	-3.6%	2.7%
Switzerland	1.0%	-5.8%	6.0%
UK	1.4%	-10.8%	10.2%
USA	2.3%	-4.2%	3.9%
Brazil	1.1%	-6.2%	4.6%
China	6.1%	2.5%	7.9%
India	4.9%	-5.7%	10.8%
Russia	1.3%	-6.0%	3.3%
World	2.9%	-4.9%	5.4%

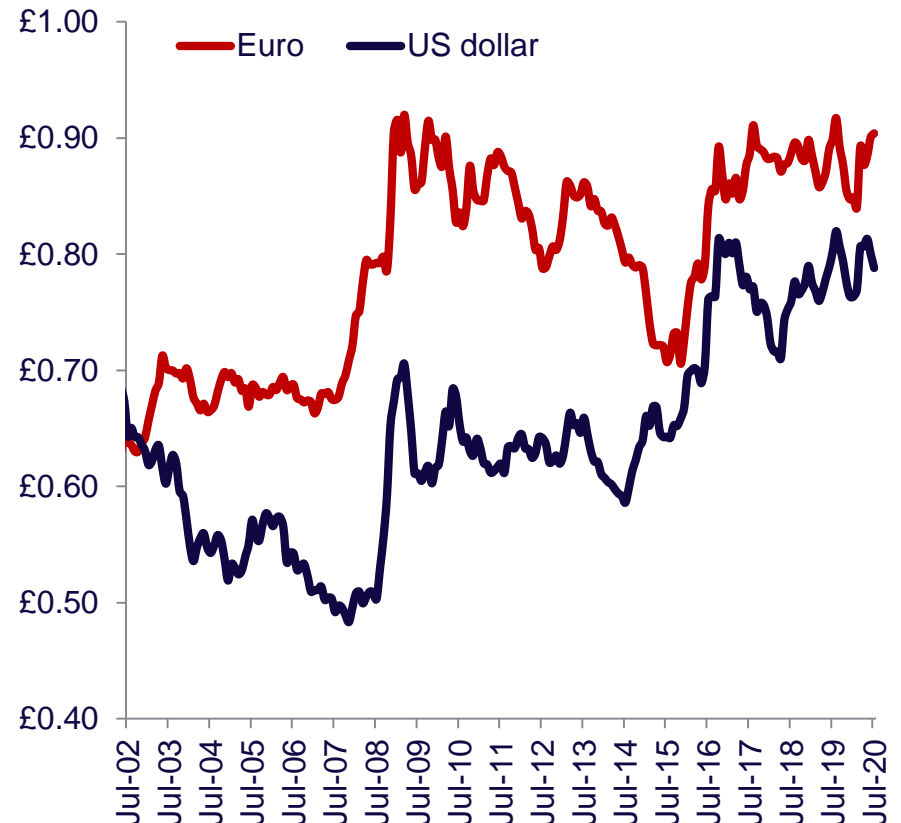
Exchange rate

The pound stood at €1.11 and \$1.27 on average in July 2020 (and €1.11 and \$1.30 at time of writing in early August), compared to €1.18 and \$1.31 last December. The Euro has gradually fallen since the start of the year; however, the US Dollar is up from its low point in May.

Against the US dollar, the pound was up 2% year on year in July 2020, and 4% down on July 2018. It was down 1% against the euro year on year, and down 2% to two years ago.

Looking at Q1 2020, the pound averaged €1.16 and \$1.28, up 1% against the euro vs. Q1 2019, and down 2% against the dollar.

Value of the Euro and US dollar against the pound
Monthly averages to July 2020





Visits and value trends by journey purpose, region visited and transport mode

The next series of charts track progress in visits to the UK for different journey purposes, to different regions of the UK and using different modes of transport to get to the UK.

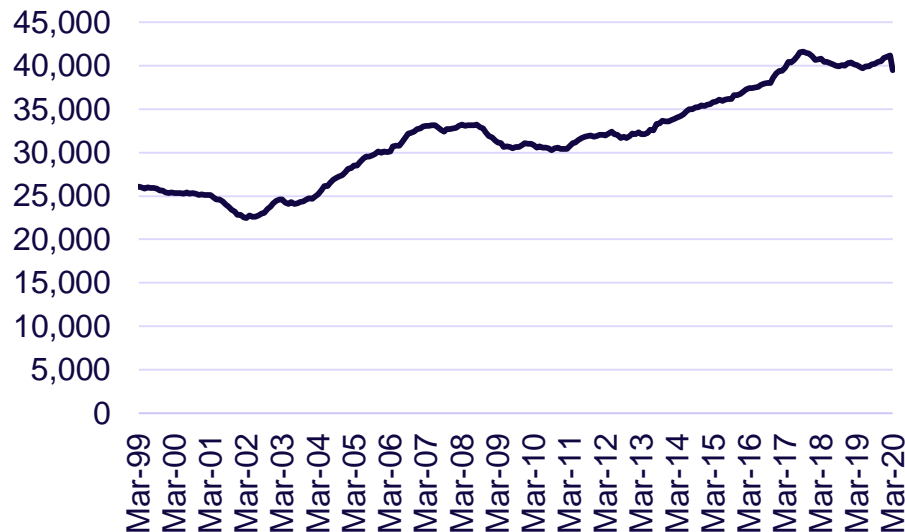
Inbound volume

In Q1 2020 there were 7.0 million international visits to the UK. Arrivals decreased by 16% on Q1 2019.

Visits in 2019 grew by 1% compared to 2018, with 40.9 million visits, achieving the second best annual period behind the 2017 record.

Visits in the rolling 12 month period to March 2020 were down 1% year-on-year to 39.5 million visits.

Inbound visits (000s), rolling year ending



	Visits (000s)	Growth
Q1 2020	6,994	-16%
Latest full year (2019)	40,857	+1%
Rolling 12 months to March 2020	39,520	-1%
March 2020	1,446	-54%

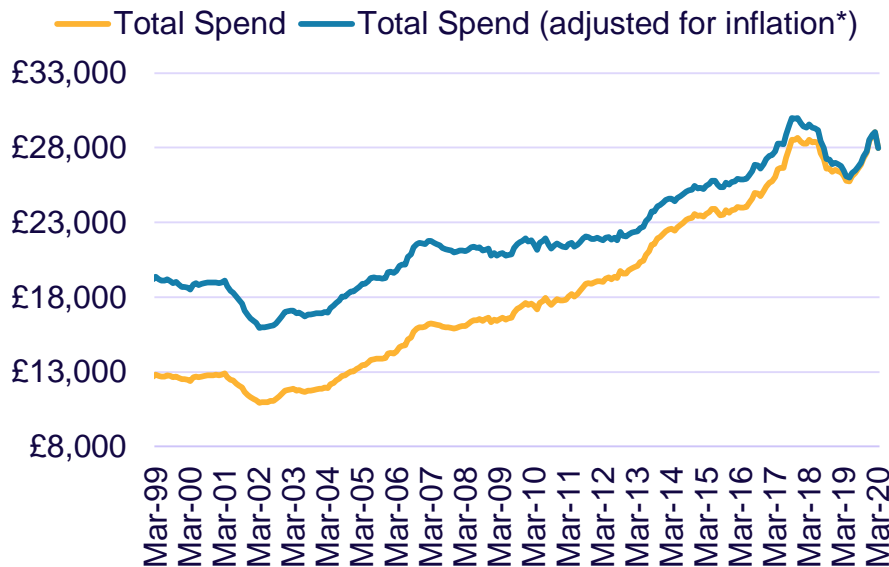
Inbound value

Q1 2020 international visitor spend declined 10% vs Q1 2019 to £4.3 billion.

In 2019, spending levels was up 7% on 2018 with £28.4 billion, creating a new annual spending record.

Looking at the rolling 12 months to March 2020, spend increased 7% year-on-year to £28.0 billion, just short of the 2017 record for the same time period.

Inbound spend (£m), rolling year ending



	Spend (£m, nominal terms)	Growth
Q1 2020	4,344	-10%
Latest full year (2019)	28,448	+7%
Rolling 12 months to March 2020	27,988	+7%
March 2020	780	-58%

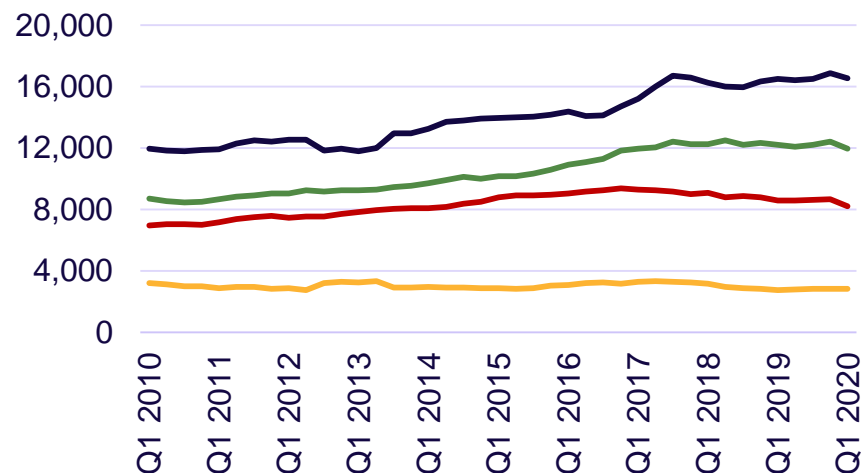
Journey Purpose trends

Holiday visits in 2019 were up 3% on 2018 to 16.9 million, beating the 2017 record. Spending levels rose 9% YoY in 2019 to £13.3 billion, creating another record. In Q1 2020 holiday visits were down 12% YoY to 2.6 million. Journeys to visit friends or relatives (**VFR**) increased in 2019, with a record 12.4 million visits, up 1% YoY. Spend was also up 3% on 2018 to £6.4 billion – although no new record. Looking at Q1 2020, visits were down 18% on Q1 2019 to 2.2 million visits.

Business visits were down 1% in 2019 to 8.7 million, and spending up 14% on 2018 results to £5.8 billion. Visits in Q1 2020 fell 22% YoY to 1.7 million.

Visits for **miscellaneous purposes** (including study) grew 1% in 2019 to 2.9 million visits but spend fell by 2% year-on-year in 2019. Q1 visits declined 6% YoY to 538,000.

Inbound visits by journey purpose (000s), rolling year ending



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar20) visits (000s)	Rolling 12 months (Apr'19-Mar20) spend (£m)
Holiday	16,905	+3%	£13,341	+9%	16,541	£13,003
Business	8,670	-1%	£5,823	+14%	8,207	£5,625
VFR	12,427	+1%	£6,408	+3%	11,952	£6,475
Misc.	2,855	+1%	£2,836	-2%	2,820	£2,845

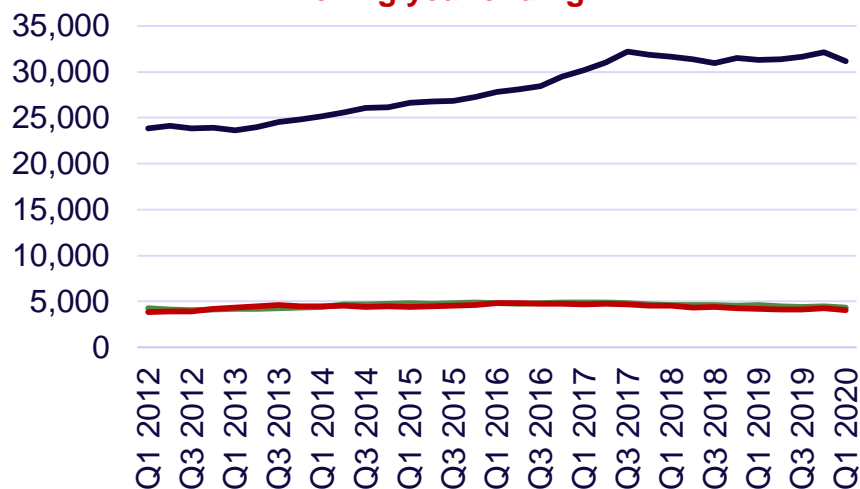
Transport mode

Travel via **air** increased 2% in 2019 compared to 2018, with a record 32.1 million visits, beating the 2017 record. Those visitors also spent 7% more than the air visitors in 2018. Looking at Q1 2020 results, visits were down 16% on Q1 2019 to 5.5 million visits.

Visits to the UK via **tunnel** were on par year-on-year in 2019, whilst spend dipped by 4%. Visits in Q1 2020 fell 22% YoY to 760,000 visits.

Visits in 2019 to the UK departing via the **sea** were just behind 2018, down 1% with 4.5 million visits. Between January – March 2020, visits declined 12% on January – March 2019, to 765,000 visits.

Inbound visits by mode of transport (000s), rolling year ending



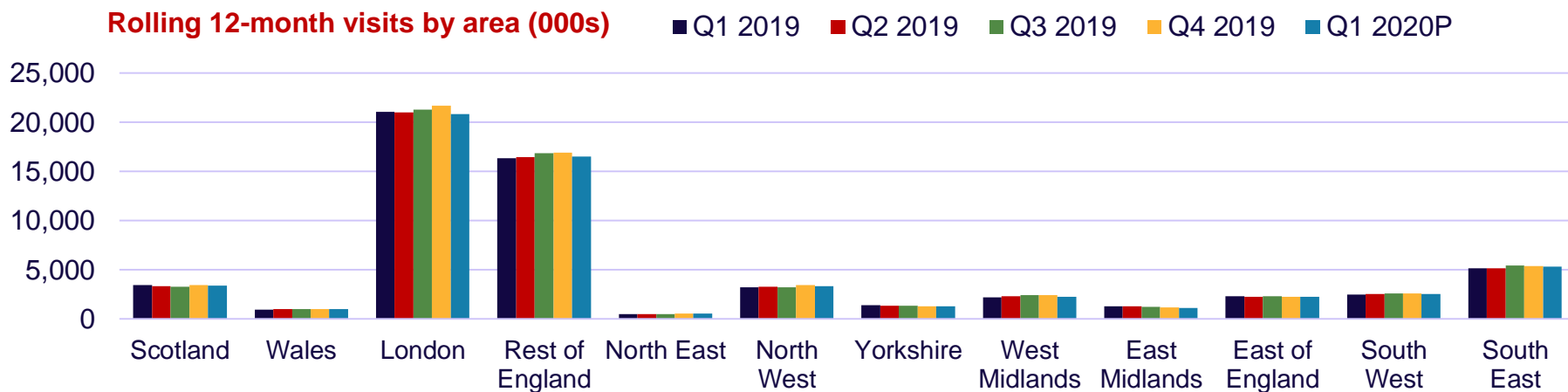
	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar20) visits (000s)	Rolling 12 months (Apr'19-Mar20) spend (£m)
Air	32,137	+2%	£24,933	+7%	31,120	£24,514
Tunnel	4,260	0%	£1,797	+4%	4,048	£1,815
Sea	4,460	-1%	£1,718	+14%	4,352	£1,658

Area visited

In January to March 2020, many regions saw year-on-year (YoY) declines in visits due to the coronavirus pandemic, with double-digit declines in all regions except the **North East** (+10%).

Spend results show that some nations and regions showed growth, but 6 English regions. Inbound spending in **Wales** reached a new record with £81 million.

January-March 2020	Visits (000s)	Growth	Spend (£m)	Growth
Total UK	6,994	-16%	£4,344	-10%
Scotland	367	-17%	£204	-3%
Wales	148	-5%	£81	+50%
London	3,696	-19%	£2,556	-18%
Rest of England	2,886	-12%	£1,381	+3%
North East	111	+15%	£57	+47%
North West	585	-15%	£236	-16%
Yorkshire	245	-2%	£102	+36%
West Midlands	382	-29%	£131	-23%
East Midlands	203	-20%	£70	-5%
East of England	413	-3%	£192	+34%
South West	345	-15%	£201	+14%
South East	842	-9%	£391	+2%



Source: International Passenger Survey. Please note that sample sizes at the quarterly level for some regions can be low and results should be treated with caution, especially for spending.



Visits and value trends by source market

The next series of charts track progress in visits to the UK from different countries around the world.

Latest quarterly data: selected markets

Quick overview of results from selected markets in Q1 2020 vs Q1 2019:

- **Australia:** visits grew 19% to 166,000 visits with spend up 38% to a record £193 million.
- **Belgium:** visits fell 4% to 226,000 visits with spend up 12% to £67 million.
- **China:** reported 93,000 visits, while spending decreased 17% to £181 million.
- **France:** visits were down 9% to 743,000 with spend up 1% to £264 million.
- **Germany:** reported 453,000 visits and spend fell by 28% to £172 million.
- **GCC*:** visits were down 10% to 194,000 visits, with spend down 20% to £392 million.
- **Irish Republic:** visits were down 5% to 616,000 while spending increased by 39% to £289 million.
- **Italy:** visits were down to 279,000 visits, and spend decreased 50% to £118 million.
- **Norway:** visits were down 8% to 127,000 but spend increased by 17% to £86 million.
- **Poland:** visits were down 20% to 307,000 visits, with spend down 7% to £79 million.
- **Switzerland:** visits were down to 138,000 visits and spend down by 4% to £104 million.
- **USA:** visits fell by 10% to 693,000 with spend decreasing by 19% to £551 million.

Q1 2020	Visits (000s)	Growth	Spend (£m)	Growth
Australia	166	+19%	£193	+38%
Belgium	226	-4%	£67	+12%
Canada	101	-23%	£67	-51%
China*	93	-22%	£181	-17%
France	743	-9%	£264	+1%
Germany	453	-33%	£172	-28%
GCC**	194	-10%	£392	-20%
Hong Kong*	40	-43%	£47	-56%
India*	69	-42%	£78	-26%
Irish Republic	616	-5%	£289	+39%
Italy	279	-42%	£118	-50%
Netherlands	391	-2%	£114	-2%
Norway	127	-8%	£86	+17%
Poland	307	-20%	£79	-7%
Romania	185	-28%	£80	-26%
Spain	411	-22%	£174	-5%
Sweden*	105	-47%	£62	-21%
Switzerland	138	-30%	£104	-4%
USA	693	-10%	£551	-19%

*Sample size is below 100 but above 50, treat with caution

**GCC = Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE

North West Europe

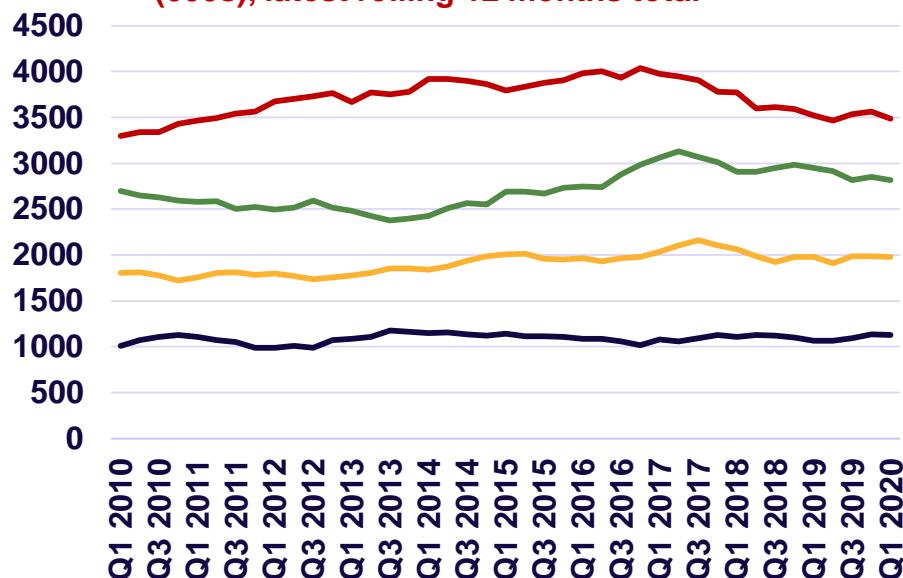
North West Europe provides some of our highest levels of visits to the UK. Visits from **France** declined 1% in 2019 YoY, with spend up 4%. Looking at Q1 2020, visits fell 9% on Q1 2019, to 743,000 visits.

Visits in 2019 from **Irish Republic** were down 4% on the same period in 2018. Visitors spent £958 million, -1% YoY. Visits in Q1 2020 were down 5% YoY to 616,000.

In 2019, visits to **Belgium** were up 3% with spend down 8% YoY. Between January – March 2020 visits were down 4% on January – March 2019, to 226,000 visits.

Netherlands showed on par trends year-on-year in visits in 2019. However, spend increased by 10%, creating a record with £796 million. In Q1 2020, visits dipped 2% YoY to 391,000 visits.

Inbound visits from NW Europe markets (000s), latest rolling 12 months total



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar'20) visits (000s)	Rolling 12 months (Apr'19-Mar'20) spend (£m)
Belgium	1,135	+3%	£359	-8%	1,124	£366
France	3,561	-1%	£1,398	+4%	3,490	£1,400
Irish Republic	2,851	-4%	£958	-1%	2,816	£1,039
Netherlands	1,987	0%	£796	+10%	1,981	£794

Source: International Passenger Survey. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending.

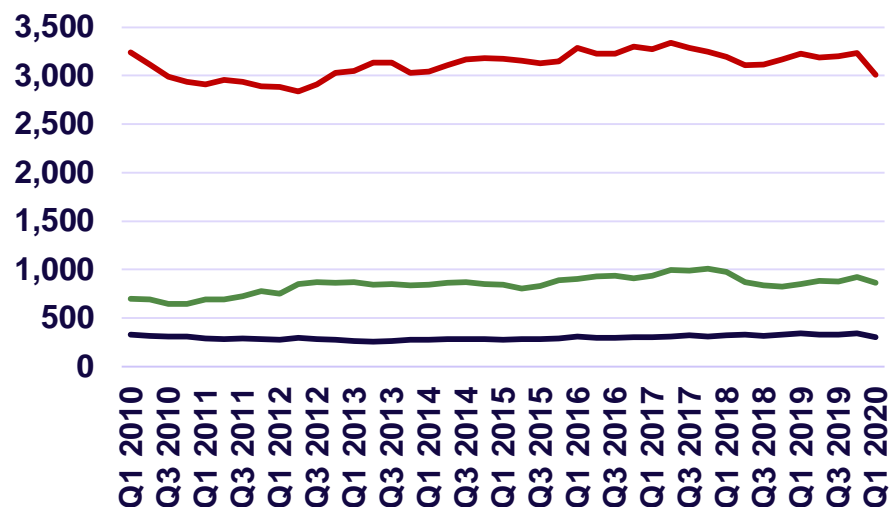
Central Europe

Germany: in 2019 visits were up 2% YoY to 3.2 million. Spending also showed growth with +6% YoY to a record £1.6 billion. Q1 2020 results show a 33% decline on Q1 2019, to 453,000 visits.

Visits and spend from **Switzerland** were up 12% and 23% YoY in 2019. During the first 3 months of 2020, visits were down 30% YoY to 138,000 visits.

2019 inbound visits from **Austria** grew 5% to a record 342,000 visits. Spending levels also saw growth with +15% in 2019. Visits during January – March 2020 fell 46% on January – March 2019, to 44,000 visits.

Inbound visits from Central Europe markets (000s), latest rolling 12 months total



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar'20) visits (000s)	Rolling 12 months (Apr'19-Mar'20) spend (£m)
Austria	342	+5%	£172	+15%	305	£166
Germany	3,233	+2%	£1,567	+6%	3,011	£1,501
Switzerland	926	+12%	£570	+23%	867	£565

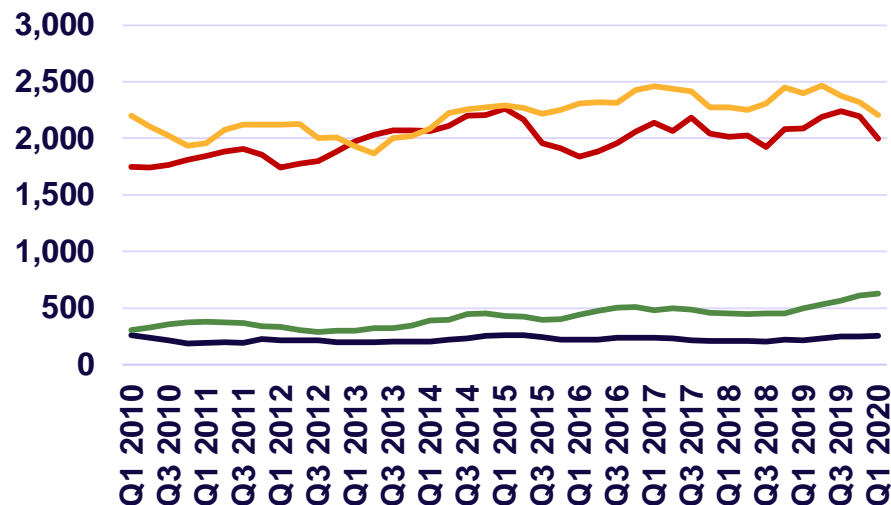
Southern Europe

In 2019, visits and spend from **Spain** dipped by 6% and 9% respectively YoY. This trend continued in Q1 2020 with visits falling 22% on Q1 2019 to 411,000. Visits from **Italy** in 2019 were up 6% and spend up 23% YoY. Looking at Q1 2020, visits declined 42% YoY to 279,000.

Growth in 2019 saw record visits from **Portugal**, up 35% and record spending up 68% YoY. Visits during the first 3 months of 2020, increased 12% YoY to a record 157,000 visits.

Visits from **Greece** were up 12% in 2019, with spend up 30%. Q1 2020 visits were also up by 6% on Q1 2019 to 52,000 visits.

Inbound visits from Southern Europe markets (000s), latest rolling 12 months total



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar20) visits (000s)	Rolling 12 months (Apr'19-Mar20) spend (£m)
Greece	250	+12%	£170	+30%	253	£157
Italy	2,197	+6%	£1,109	+23%	1,994	£991
Portugal	613	+35%	£292	+68%	629	£294
Spain	2,319	-5%	£977	-9%	2,204	£969

Source: International Passenger Survey. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending.

Nordics

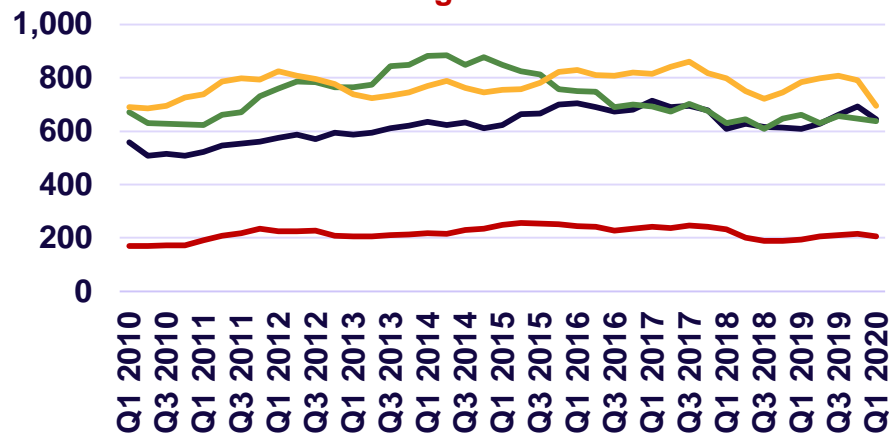
Visits from **Sweden** in 2019 were up 6% on the year before to 798,000. Meanwhile, spending in 2019 was on par with 2018 results. Visits between January – March 2020 fell 47% to 105,000 compared to January – March 2019.

Denmark showed upward year-on-year trends in both visits and spend in 2019, with visits up 13% and spend up 3%. Looking at Q1 2020, visits were down 40% compared to the year before with 71,000 visits.

Visits from **Norway** in 2019 were on par year-on-year, with spend levels increasing by 16% YoY. Visits in the first 3 months of 2020 dipped 8% YoY to 127,000 visits.

Visits and spend from **Finland** in 2019 increased on 2018 by 14% and 19% respectively. Q1 2020 visits declined 18% on Q1 2019, to 44,000 visits.

Inbound visits from Nordic markets (000s), latest rolling 12 months total



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar20) visits (000s)	Rolling 12 months (Apr'19-Mar20) spend (£m)
Denmark	691	+13%	£329	+3%	645	£316
Finland	215	+14%	£122	+19%	205	£119
Norway	647	0%	£437	+16%	637	£449
Sweden	798	+6%	£400	0%	695	£384

Source: International Passenger Survey. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending.

Eastern Europe

Czech Republic had double-digit growth in visits for 2019 with +15%. Meanwhile, spend achieved a new record with £165 million. Looking at Q1 2020, visits declined 31% on Q1 2019, to 65,000.

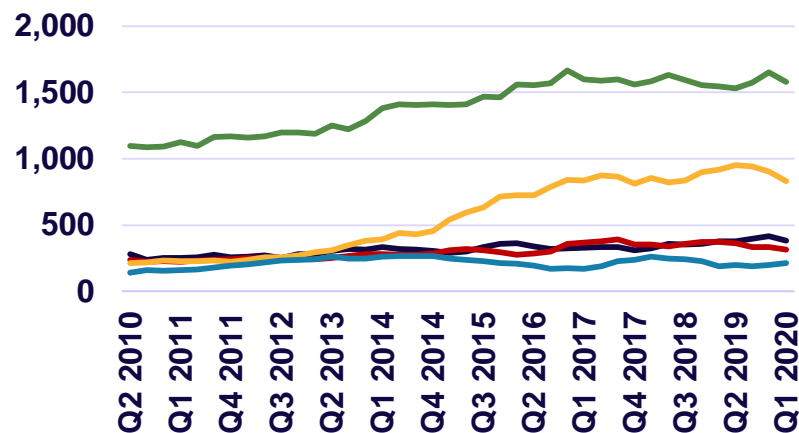
In 2019, **Romania** set records for visits and spend with 902,000 visits and £439 million spend. Q1 2020 visits were down 28% year-on-year to 185,000.

Visits from **Poland** in 2019 saw growth of 6%, whilst spend was up with double-digit growth. Between January – March 2020 visits from Poland were down 20% YoY to 307,000.

In 2019 **Russia** visits and spend were down 13% and 8% YoY, respectively. Q1 2020 visits increased by 51% on Q1 2019 to 41,000.

Hungary saw a decline in visits but increases in spend with a new record. Q1 2020 visits were down 27% YoY to 58,000.

Inbound visits from Eastern Europe markets (000s), latest rolling 12 months total



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar20) visits (000s)	Rolling 12 months (Apr'19-Mar20) spend (£m)
Czech Rep	414	+15%	£165	+55%	384	£180
Hungary	334	-10%	£145	+22%	312	£139
Poland	1,651	+6%	£498	+27%	1,576	£493
Romania	902	+1%	£439	+1%	831	£412
Russia	199	-13%	£182	-8%	213	£198

Source: International Passenger Survey. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending.

English-speaking long-haul

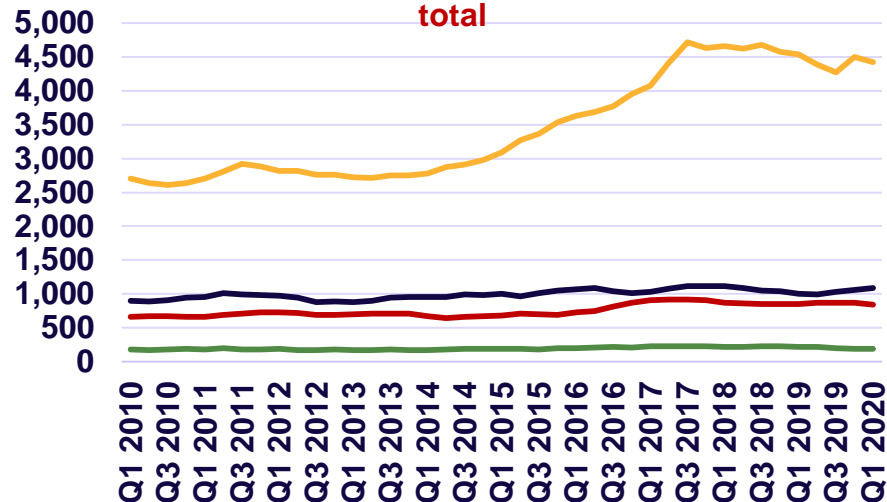
In 2019, visits from the **USA** fell by 2% whilst spend grew by 4% YoY. In the first 3 months of 2020, visits dipped by 10% on the same period in 2019, to 693,000.

Canada 2019 visits increased by 3% YoY and spending levels achieved a record for 2019 with £734 million. Between January – March 2020 visits declined 23% on January – March 2019 to 101,000.

New Zealand showed downward trends in both visits and spend in 2019 after record visits and spending in 2018. Q1 2020 visits from New Zealand saw growth of 22% on Q1 2019 with 27,000 visits.

Visits and spending from **Australia** increased in 2019 by 2% and 8% YoY respectively. Looking at Q1 2020, visits were up 19% YoY to 166,000.

Inbound visits from English-speaking long-haul markets (000s), latest rolling 12 months total



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar20) visits (000s)	Rolling 12 months (Apr'19-Mar20) spend (£m)
Australia	1,063	+2%	£1,174	+8%	1,090	£1,226
Canada	874	+3%	£734	+8%	843	£666
New Zealand	188	-19%	£171	-38%	192	£193
USA	4,499	-2%	£4,184	+4%	4,424	£4,052

Source: International Passenger Survey. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending.

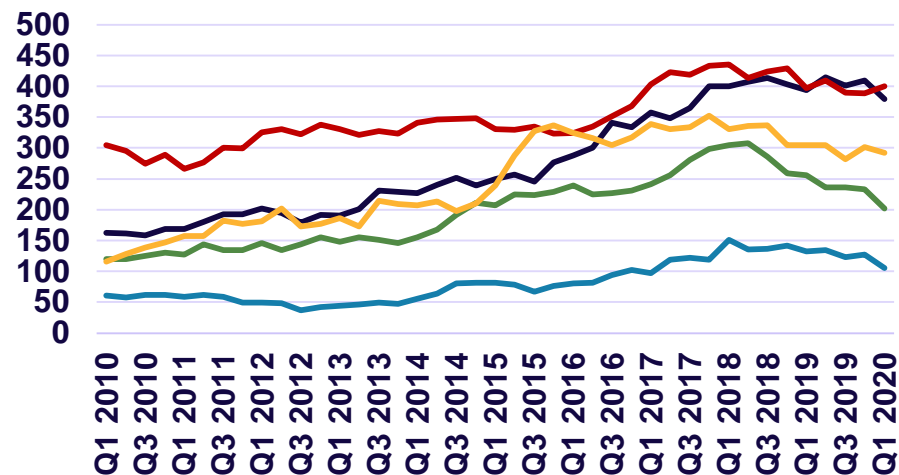
Advanced Asia

Singapore and **Japan** both had downward trends year-on-year in visits and spend in 2019. Japan saw an increase of 15% YoY in Q1.

Hong Kong: visits and spend achieved records for 2019. Visits grew by 2% to 409,000 and spend grew by 15% to £560 million. In Q1 2020, visits were down 43% YoY to 40,000.

South Korea: visits in 2019 fell by 1% to 301,000 but spend increased by 5% to £285 million. Looking at Q1 2020, visits fell 14% on Q1 2019 to 56,000 visits. Visits from **Taiwan** fell by 10% in 2019 to 127,000. Spending set a record with £188 million in 2019.

Inbound visits from Advanced Asia markets (000s), latest rolling 12 months total



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar20) visits (000s)	Rolling 12 months (Apr'19-Mar20) spend (£m)
Hong Kong	409	+2%	£560	+15%	379	£500
Japan	389	-9%	£369	-26%	400	£383
Singapore	233	-10%	£299	-10%	202	£271
South Korea	301	-1%	£285	+5%	292	£265

Source: International Passenger Survey. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending. Sample size for Taiwan (in light blue in the chart) is too small for short-term results to be individually shown in the table.

Emerging Asia

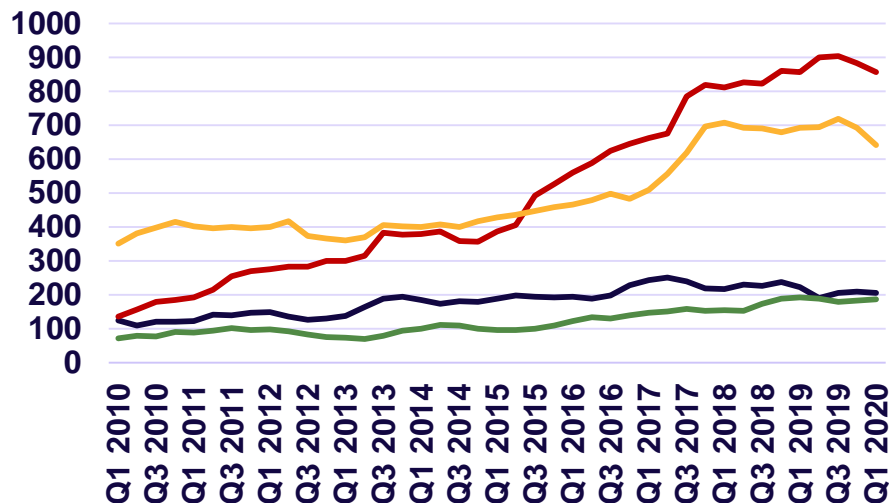
Visits from **China** reached a new record in 2019 with 883,000 visits, whilst spend grew by 14% to £1.7 billion. Visits during the first 3 months of 2020 fell by 22% on the same period in 2019 to 93,000 visits.

Malaysia had decreases in 2019 for visits and spend with -12% and -2% respectively. Q1 2020 saw a similar trend with visits dipping 9% on Q1 2019 to 26,000.

In 2019, **India** visits and spend grew 2% and 16% respectively YoY with spend creating a new record of £753 million. Looking at Q1 2020, visits saw a double digit decline to 69,000 visits.

Thailand: visits and spend fell by 2% and 12% in 2019 overall.

Inbound visits from Emerging Asia markets (000s), latest rolling 12 months total



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar20) visits (000s)	Rolling 12 months (Apr'19-Mar20) spend (£m)
China	883	+3%	£1,710	+14%	857	£1,672
India	692	+2%	£753	+16%	642	£725
Malaysia	210	-12%	£238	-2%	207	£247

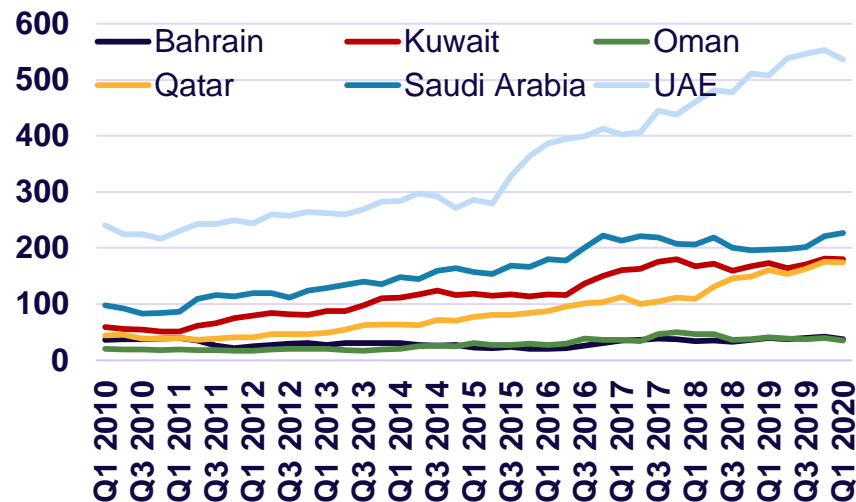
Source: International Passenger Survey. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending. Sample size for Thailand (in green in the chart) is too small for short-term results to be individually shown in the table. 23

The Gulf

Both **Saudi Arabia** and **Qatar** reported double-digit YoY growth in visits and spend in 2019, with Qatar setting records in both visits and spend. Visits from Saudi Arabia in Q1 2020 increased 18% on Q1 2019.

Kuwait and the **UAE** reported growth in visits for 2019 but saw a decrease in spend for 2019. Kuwait set a record for visits in 2019 with 181,000. Although spend decreased by 8% in 2019. Similarly, the UAE achieved a record for visits in 2019 with 553,000. Between January – March 2020, both Kuwait and the UAE saw declines in visits year-on-year with -2% and -19% respectively.

Inbound visits from Gulf markets (000s), latest rolling 12 months total



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar20) visits (000s)	Rolling 12 months (Apr'19-Mar20) spend (£m)
Kuwait	181	+8%	£406	-8%	180	£383
Qatar	175	+18%	£548	+72%	174	£555
Saudi Arabia	221	+12%	£627	+27%	227	£576
UAE	553	+8%	£869	-5%	536	£846

Source: International Passenger Survey. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending. Sample size for Bahrain and Oman (in dark blue and green respectively in the chart) is too small for short-term results to be individually shown in the table.

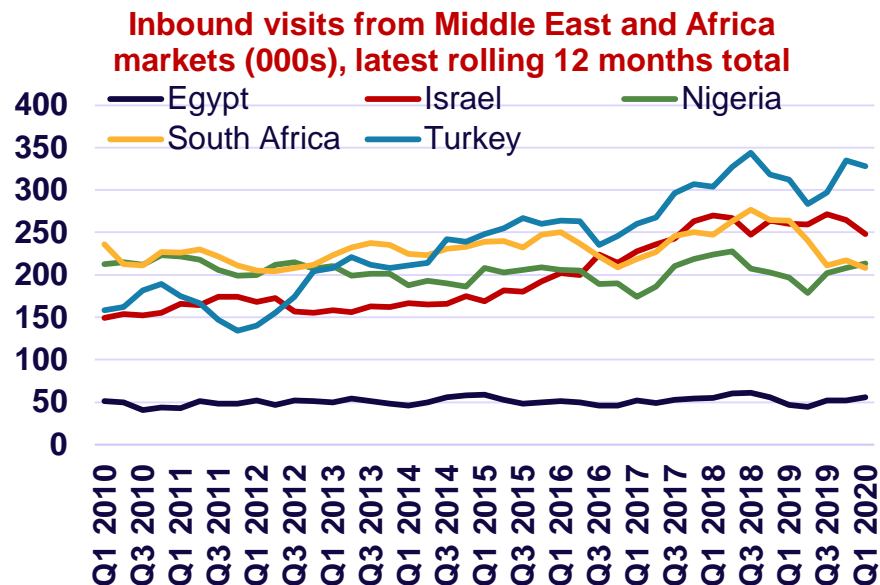
Rest of Middle East & Africa

Israel: visits in 2019 were on par with 2018, setting a new record with 265,000 visits whilst spend increased by 12% to £243 million. Looking at Q1 2020, visits were down 28% YoY to 43,000.

Visits from **Turkey** set a new record with 334,000 visits in 2019. Spend in 2019 fell by 2% to £264 million.

Visits in 2019 from **South Africa** decreased 18% and spend decreased by 28% YoY. Q1 2020 visits followed the same trend with a decrease of 20% on Q1 2019.

Nigeria showed more positive results with YoY growth in visits and spend in 2019. Q1 2020 also showed positive results with a growth of 16% YoY to 35,000.



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar20) visits (000s)	Rolling 12 months (Apr'19-Mar20) spend (£m)
Israel	265	0%	£243	+12%	248	£236
Nigeria	208	+3%	£332	+12%	213	£338
South Africa	217	-18%	£222	-28%	208	£210
Turkey	334	+5%	£264	-2%	328	£283

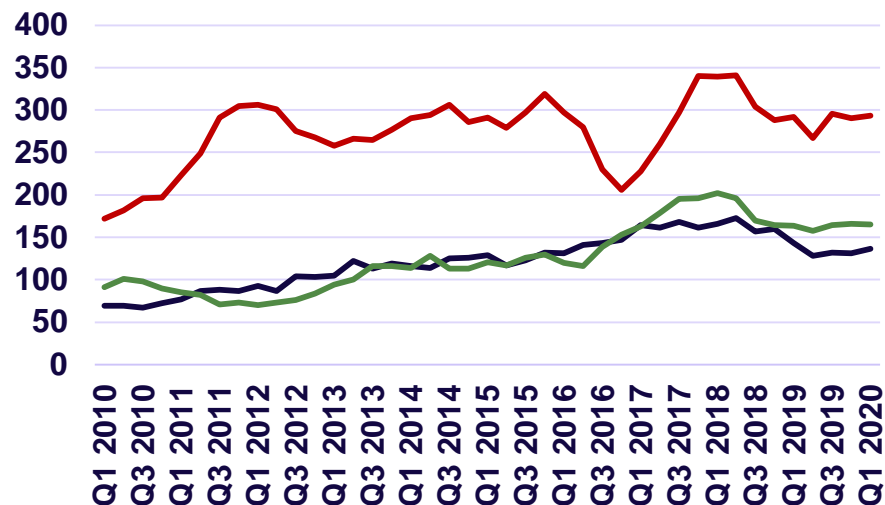
Source: International Passenger Survey. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending. Sample size for Egypt (in dark blue in the chart) is too small for short-term results to be individually shown in the table.

Latin America

Visits and spend from **Brazil** in 2019 grew by 1% and fell by 1% respectively. Between January – March 2020 visits were up 3% on January – March 2019 to a record 76,000 visits.

Argentina and **Mexico** are both smaller inbound markets for the UK. In 2019 Argentina saw double-digit decreases in visits and spend with -18% and -53% respectively YoY. Mexico reported upward trends for visits and spend in 2019 with visits up 1% and spend up 39% YoY.

Inbound visits from Latin American markets (000s), latest rolling 12 months total



	2019 visits (000s)	Change v 2018	2019 spend (£m)	Change v 2018	Rolling 12 months (Apr'19-Mar20) visits (000s)	Rolling 12 months (Apr'19-Mar20) spend (£m)
Argentina	131	-18%	£74	-53%	136	£112
Brazil	291	+1%	£250	-1%	293	£255
Mexico	166	+1%	£122	+39%	165	£129

Definitions & Learn more

It is possible to find much more detail about all of VisitBritain's priority markets, including the latest quarterly data from the International Passenger Survey, by exploring the Insights & Statistics pages of our website.

In addition to being able to manipulate data through a series of visualisations our Market and Trade Profiles provide a comprehensive summary of each market including trends, attitudes and characteristics.

The data source for all charts and tables is the **International Passenger Survey**, conducted by the **Office for National Statistics**.

Definitions

YoY – Year on Year

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



Inbound Tourism Trends Quarterly Q1 2020