

# Inbound Tourism Trends Quarterly Q3 2016

Issue 20

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# About this data

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

The next Quarterly Release (Q4, October – December 2016) is scheduled for May 2016. This will provide data on visits by markets and UK region visited up to Q4 2016.

The Annual Release for 2016, which will contain some revisions to the quarterly data, is also scheduled for May 2017.

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.

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 3,000-4,000 per quarter.



# 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

For January to September 2016, international tourism arrivals are up 3.7% year on year. Visits to Europe overall are up 1.6% and to the EU up 4.1%.

UNWTO forecasts that international tourist arrivals will increase globally by 3.5%-4.5% in 2016.

According to the UNWTO there were **1.186 billion** international tourism trips during 2015, 4.6% up on the year before. In 2016 so far, Asia Pacific has seen the strongest growth, up 9.3%, followed by Africa with 8.4%. Visits to the Americas are up by 4.4% and Europe by 1.6%. Middle East is the only region to see a decline.



Continents	International tourist arrivals to region 2015 (millions)	% Growth 2014 - 2015	% Growth (Jan – Sept 16 v Jan – Sept 15)
World	1,186	4.6%	3.7%
Europe	608	4.7%	1.6%
Asia Pacific	279	5.6%	9.3%
Americas	193	5.9%	4.4%
Africa	54	-3.3%	8.4%
Middle East	53	1.7%	-6.4%

# Economic outlook

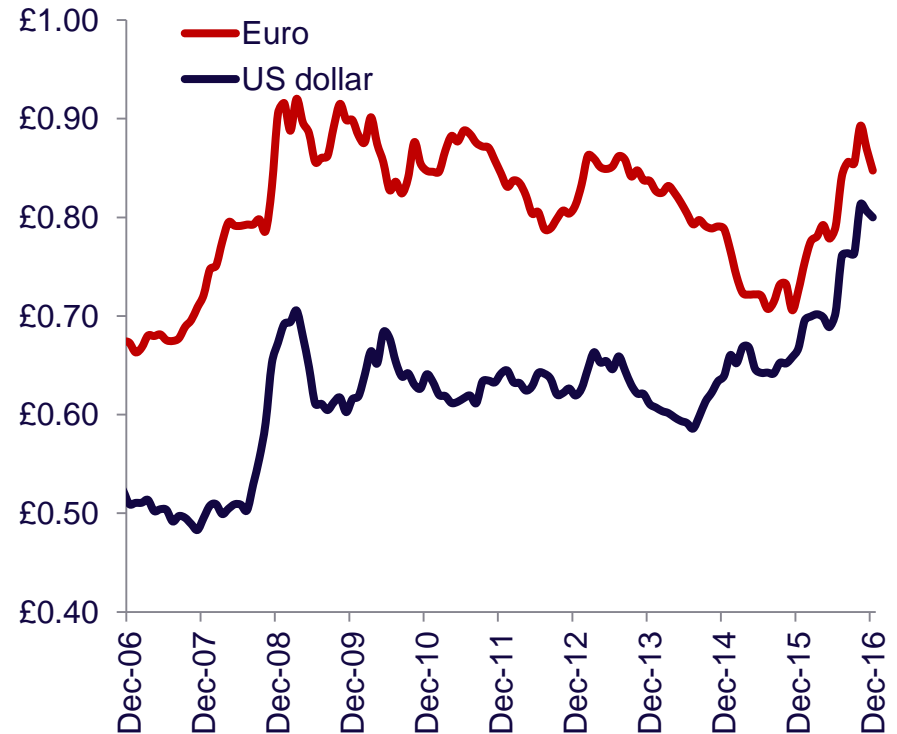
- The Bank of England have downgraded their forecasts for the UK economy since the referendum although the domestic outlook is still highly uncertain.
- European markets are generally growing at a moderate pace similar to that seen in 2016. Some of the strongest performers last year are seeing slightly lower growth this year.
- The United States economy is forecast to grow at a faster rate of 2.3% during 2017.
- China and India are still growing at a rapid pace, albeit slightly slower than in 2016; the Brazilian and Russian economies contracted in 2016 although are set to grow slowly in 2017.
- At time of writing\* the price of oil stands at \$55/barrel, a recovery from around \$40 at the start of August 2016 but still far lower than the \$110 price seen in summer 2013. The last 2 years have seen the price of oil fall by more than half. Passengers are seeing the benefit of reduced fuel costs and, in most markets, are also enjoying the wider boost to disposable incomes that comes from low inflation.

GDP growth	2016	2017	2018
Australia	2.2%	1.8%	2.9%
Canada	1.3%	1.7%	1.8%
France	1.1%	1.5%	1.5%
Germany	1.8%	1.5%	2.3%
Ireland	4.1%	2.6%	2.5%
Italy	0.9%	0.6%	1.1%
Netherlands	2.1%	1.8%	1.4%
Poland	2.4%	2.4%	3.0%
Spain	3.3%	2.5%	2.0%
Sweden	3.1%	2.1%	1.8%
Switzerland	1.4%	1.8%	1.8%
UK	2.1%	1.5%	1.5%
USA	1.6%	2.3%	2.5%
Brazil	-3.4%	0.4%	2.4%
China	6.7%	6.3%	5.9%
India	7.1%	6.7%	7.2%
Russia	-0.6%	1.2%	1.4%
<b>World</b>	<b>3.1%</b>	<b>3.4%</b>	<b>3.6%</b>

# Exchange rate

- Post the EU referendum, the Pound has fallen sharply and as of end of December was 17% down year-on-year against the US dollar at \$1.25, a slight recovery from the record low in October. The Pound was also down 14% against the Euro, at €1.18.
- In December 2016, the Pound was 18% down against the Australian dollar, 19% down against the Canadian dollar and 21% against the Japanese Yen compared to December 2015. Purchasing power in the UK from visitors in these markets has therefore increased. Spending by inbound tourists to the UK was down in Q2 2016, pre-referendum, but spending increased by 3% in Q3 after the referendum vote and the decrease in the value of GBP.

Value of US dollar and Euro against pound.  
Monthly averages to 31<sup>st</sup> December.





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

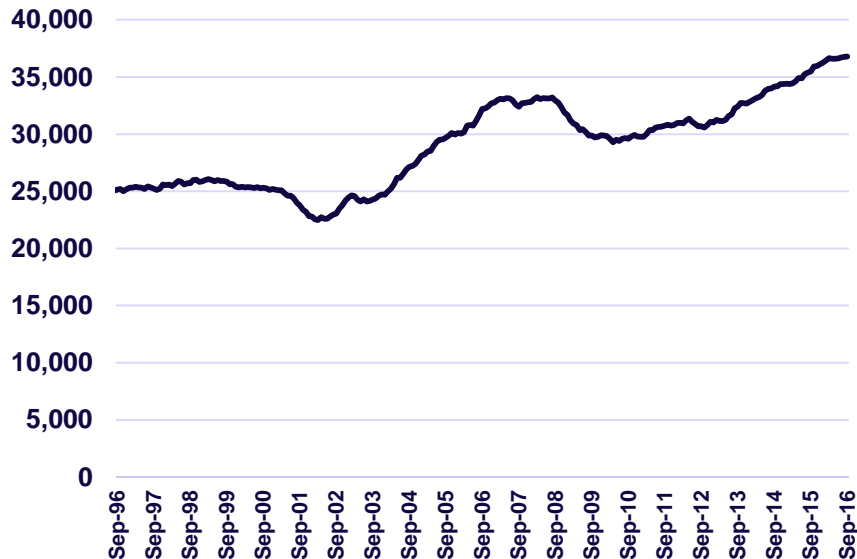
The next series of charts track progress in visits to the UK for different journey purposes, to different regions of the UK and using different modes of transport to get to the UK.



# Inbound volume

- In Q3 2016, arrivals were estimated to be up 1% compared to the same period in 2015.
- Due to the positive Q3 figures, and Q1 (+8%), the figures for the year to date (January to Sept) are 2% up on the same period in 2015.
- October, our latest monthly results, show a decline in visits, down 5% on October 2015 which was a record breaking month due to the Rugby World Cup.

**Inbound visits (000s), rolling year ending**



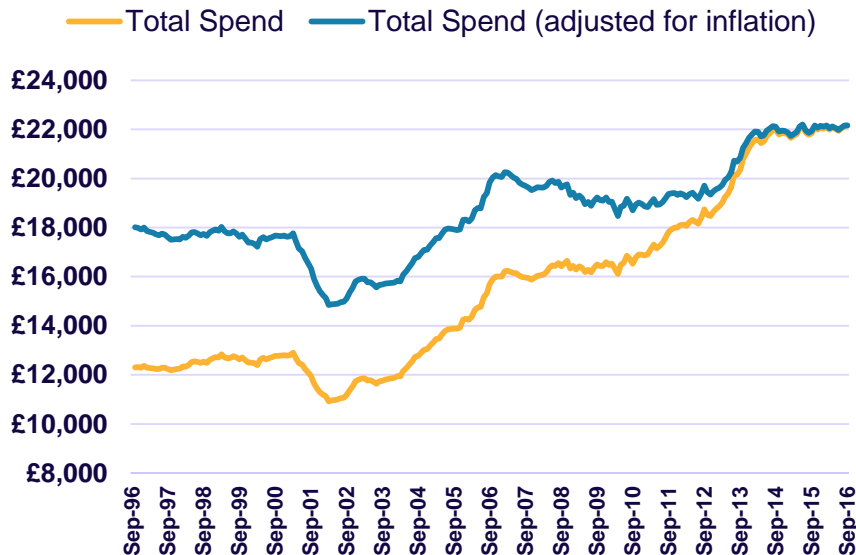
	Visits (000s)	Growth
Q3 2016	10,655	↑ 1%
Year to date (Jan – Sept)	28,098	↑ 2%
Rolling year (Oct 15 – Sept 16)	36,782	↑ 4%
October 2016	3,280	↓ -5%

# Inbound value

(Adjusted for inflation based on September 2016 price level)

- Q3 2016 spending increased 3% in nominal terms, after a slower start to the year.
- The year to date spending is level with last year, and the rolling year is up 1%, boosted by Q3 2016, as well as Q4 2015 which was a strong quarter.
- Since the EU referendum the value of GBP has fallen significantly meaning that the UK is now much more affordable for many visitors, however October's low spending is likely to be caused by fewer high spending visitors for the Rugby World Cup.

## Inbound spend (£m), rolling year ending



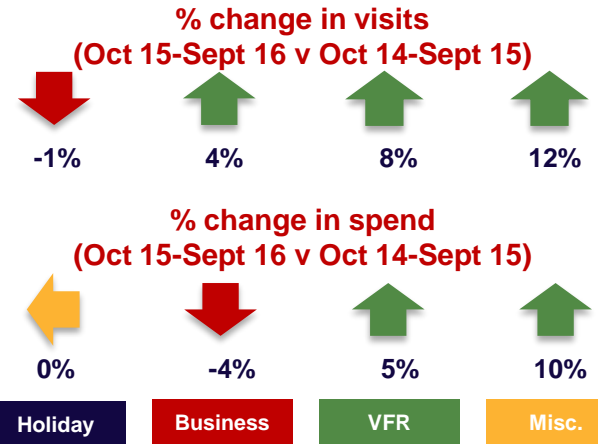
	Spend (£m) Nominal terms	Growth
Q3 2016	£7,355	↑ 3%
Year to date (Jan – Sept)	£16,835	← 0%
Rolling year (Oct 15 – Sept 16)	£22,154	↑ 1%
October 2016	£1,860	↓ -8%

# Journey Purpose trends

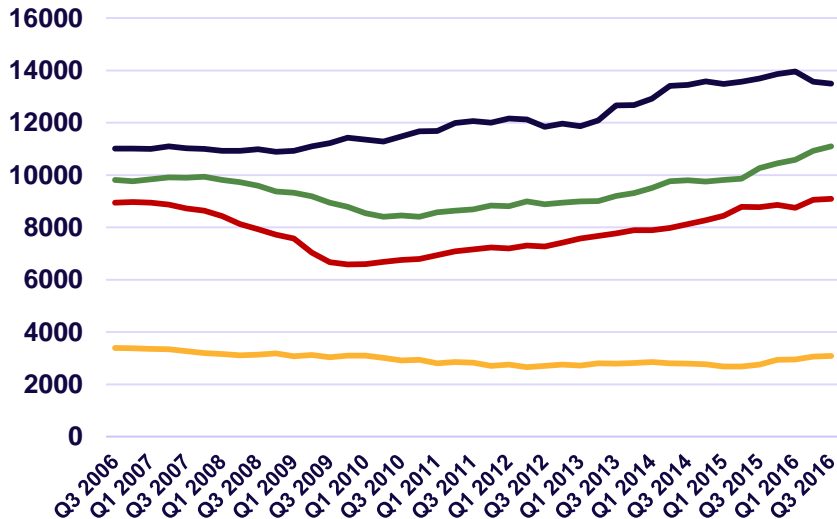
**Holiday** visits saw a steady increase over the last few years, although growth has plateaued in recent months. The latest 12 month period was down 1% for visits and spend was flat.

**Visits to friends and family (VFR)** have seen large growth in the last 4 quarters, up 8% and a new 12 month record. The latest quarter also set a new Q3 record for VFR visits.

**Business** visits were up 4% and set a new 12 month record, however spend has decreased by 4%.



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



Source: International Passenger Survey

	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
<b>Holiday</b>	10,647	£6,872	13,497	£8,538
<b>Business</b>	6,746	£3,695	9,095	£5,112
<b>VFR</b>	8,501	£3,808	11,099	£4,938
<b>Misc.</b>	2,205	£2,461	3,090	£3,567

# Transport mode

Travel via **air** continues to increase, and the most recent 12 month period set a new record at 27.07 million visits using this method. Spend is also up 3% for air travel.

Visits via the **tunnel** or **sea** remain more stable, with tunnel visits growth at 1% in the past 12 months, and sea visits flat.

**% change in visits  
(Oct 15-Sept 16 v Oct 14-Sept 15)**

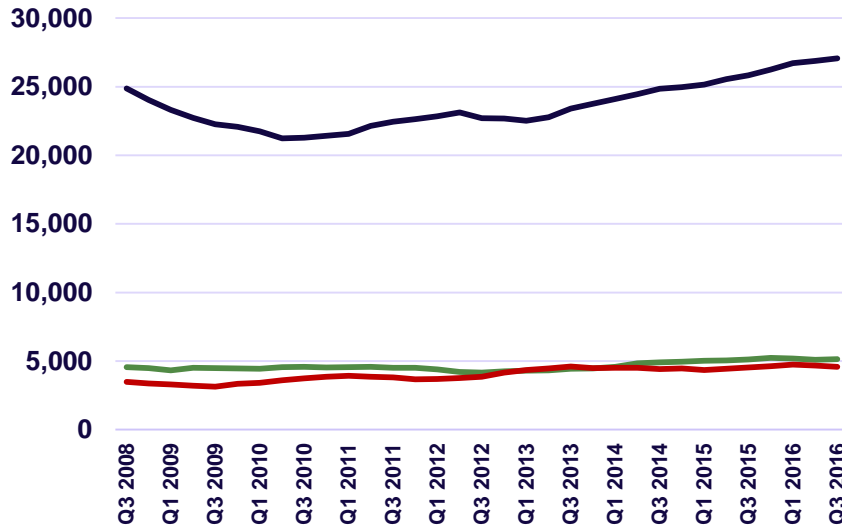


**% change in spend  
(Oct 15-Sept 16 v Oct 14-Sept 15)**



Air	Tunnel	Sea
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**Inbound visits by mode of transport (000s),  
rolling year ending**



	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
<b>Air</b>	20,647	£14,358	27,066	£18,953
<b>Tunnel</b>	3,422	£1,177	4,573	£1,563
<b>Sea</b>	4,030	£1,299	5,143	£1,638

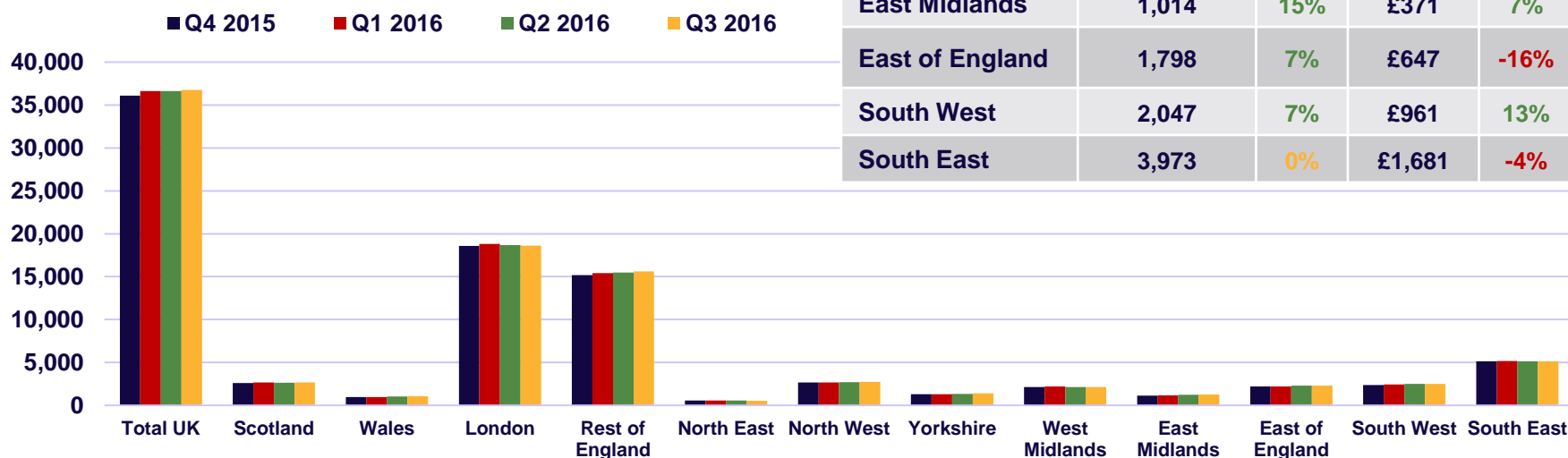
# Area visited

Most regions of the UK experienced a positive growth in visits in the first nine months of 2016, with spending not matching this growth for most regions.

Growth in visits for the **Rest of England** is currently outpacing growth in **London**.

Visits to **Wales** grew 9% in Q3 and set a new record for the year to date also. Visits to Scotland grew 4% in Q4 and year to date.

**Inbound visits by area visited, rolling 12 months (000s)**



Year to date (Jan – Sept 16)	Visits (000s)	%	Spend (£ mill)	%
Total UK	28,098	2%	£16,835	0%
Scotland	2,229	4%	£1,560	12%
Wales	856	12%	£367	9%
London	14,002	0%	£8,529	-3%
Rest of England	12,171	4%	£5,927	2%
North East	426	-8%	£352	71%
North West	2,170	3%	£871	-8%
Yorkshire	1,096	9%	£415	8%
West Midlands	1,615	0%	£630	14%
East Midlands	1,014	15%	£371	7%
East of England	1,798	7%	£647	-16%
South West	2,047	7%	£961	13%
South East	3,973	0%	£1,681	-4%



# 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 data: selected markets

Many markets experienced a decline in visits in Q3 2016, although there was strong growth from North American markets and some European markets too.

**USA:** visits increased 7% to 1.2 million and spending for Q3 2016 increased 15% to £1.1 billion, the strongest Q3 on record for spending, following on from a record breaking Q2 also.

**China:** after a record breaking 2015, Q3 visits are down 1% at 123,000, and spending decreased by 12% to £227 million.

**France:** Q3 visits are down by 8% to 895,000 and spending also decreased 8% to £411 million.

**Germany:** visits remained stable at 1.0 million in Q3. Spending increased by 13% to £527 million.

**Australia:** visits were down 12% to 389,000 and spending fell by 13% to £409 million.

**Canada:** Q3 visits are up 26% to 321,000, and spending increased 30% to £245 million, the strongest Q3 on record for both measures.

**Irish Republic:** visits increased in Q3, up 20% to 846,000 setting a new quarterly visit record - an increase driven by holiday and VFR visits. Spending increased more modestly, by 2% to £255 million.

**Spain:** after a record breaking Q2, visits from Spain were down 2% to 584,000 and spending was down 10% to £298 million in Q3 2016.

**India:** visitor levels were down 2% at 139,000, whilst spending has increased by 14% to £143 million.

**UAE:** visit numbers were down 5% to 136,000, however visitor spend was up 32% to £249 million, a new quarterly spending record.

Q3 2016	Visits (000s)	Growth
Australia	389	-12%
Belgium	279	-6%
Canada	321	26%
China	123	-1%
Denmark	173	-21%
France	895	-8%
Germany	1,001	0%
India	139	-2%
Irish Republic	846	20%
Italy	508	7%
Netherlands	532	7%
Norway	139	-34%
Poland	473	3%
Spain	584	-2%
Sweden	198	-1%
Switzerland	263	2%
United Arab Emirates	136	-5%
USA	1,222	7%

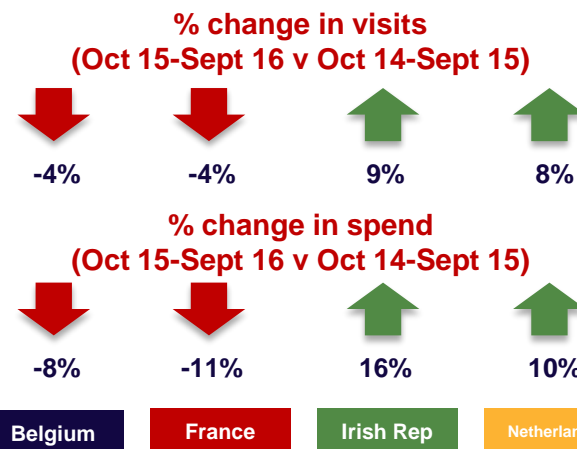
# North West Europe

Our closest neighbours in North West Europe provide some of our highest levels of visits to the UK. Visits from **France** peaked in early 2014, and have since plateaued slightly following this and dipped throughout 2016.

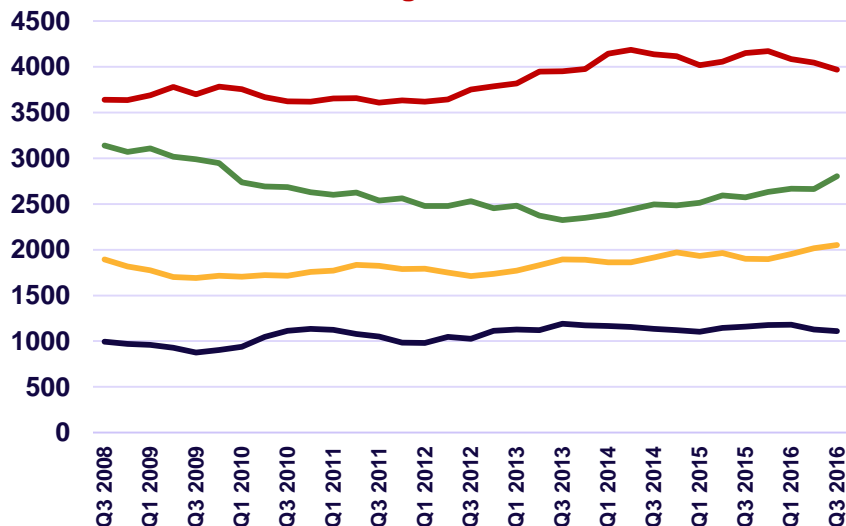
Visits from **Irish Republic** have continued to gradually recover since 2013, following economic difficulties, but are still short of the highs seen in 2008.

Visit numbers and spend are both up for **Netherlands**, with the most recent 12 month period setting a new record at 2.1 million visits.

**Belgium** experienced a weaker Q2 and Q3 in 2016 which has decreased the rolling 12 month figures.



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



	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Belgium	811	£231	1,109	£323
France	3,018	£1,068	3,967	£1,375
Irish Republic	2,159	£725	2,805	£1,009
Netherlands	1,539	£540	2,050	£720



# Central Europe

Visits from **Germany** are stable, after peaking in Q1 2016.

Visits from **Switzerland** continue to grow in 2016, with the latest 12 month period setting a new record at 947,000 visits.

Visits from **Austria** were up 12% in the last 12 months, and visits are close to breaking the 300,000 mark, which has not happened since mid 2009. Spend has fallen 3% in contrast to visits.

**% change in visits  
(Oct 15-Sept 16 v Oct 14-Sept 15)**

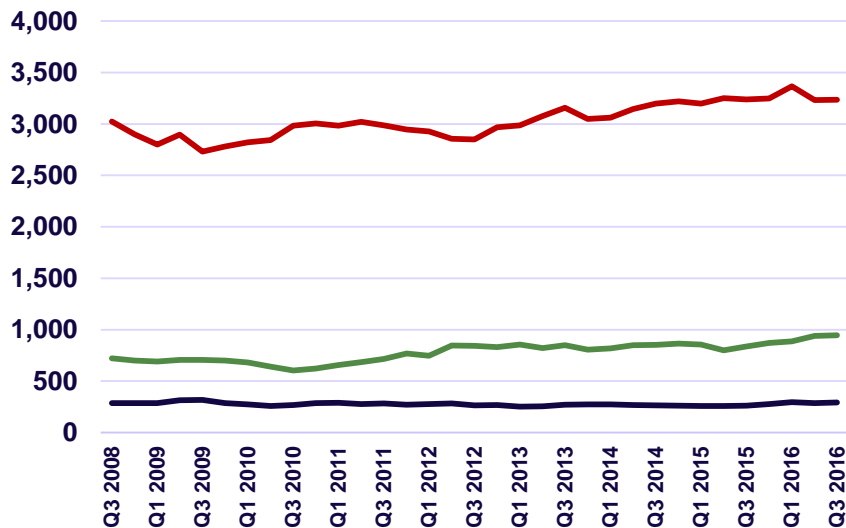


**% change in spend  
(Oct 15-Sept 16 v Oct 14-Sept 15)**



**Austria**      **Germany**      **Switzerland**

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



	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Austria	221	£122	293	£160
Germany	2,545	£1,196	3,235	£1,475
Switzerland	719	£423	947	£556

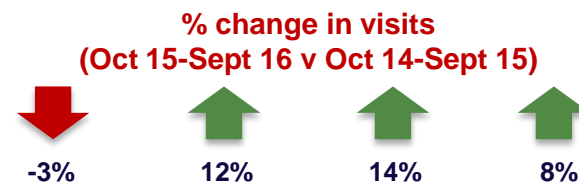
# Southern Europe

Visit numbers from **Spain** have increased sharply over the last two years, and continue to grow, as their economy continues to recover. Visits are up 8% in the last 12 months.

Visits from **Italy** are also noticeably higher than a few years ago and have set a new 12 month record at 1.95 million visits, up 12%.

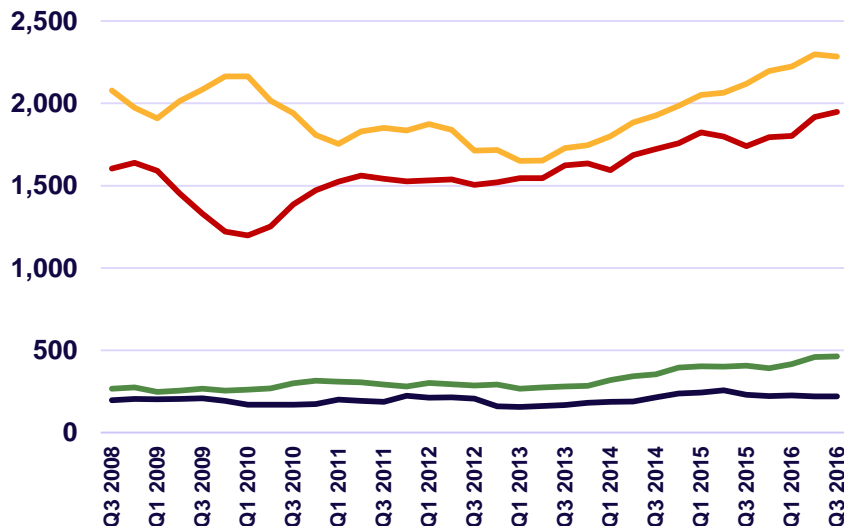
**Portugal** also set a record for the highest number of visits in 12 months, in the rolling year to Q3 2016, at 464,000 visits.

Visits from **Greece** have dropped 3% in the last 12 months, with spend plummeting by 33%.



Greece	Italy	Portugal	Spain
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**Inbound visits from Southern Europe markets  
(000s), latest rolling 12 months total**



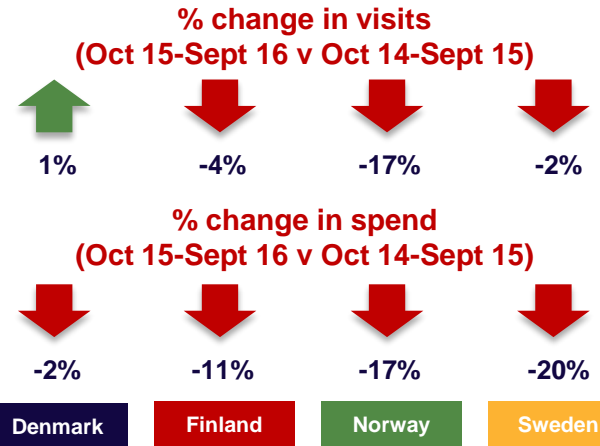
	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Greece	151	£88	221	£123
Italy	1,459	£758	1,949	£1,004
Portugal	353	£150	464	£205
Spain	1,708	£752	2,284	£1,010

# Nordics

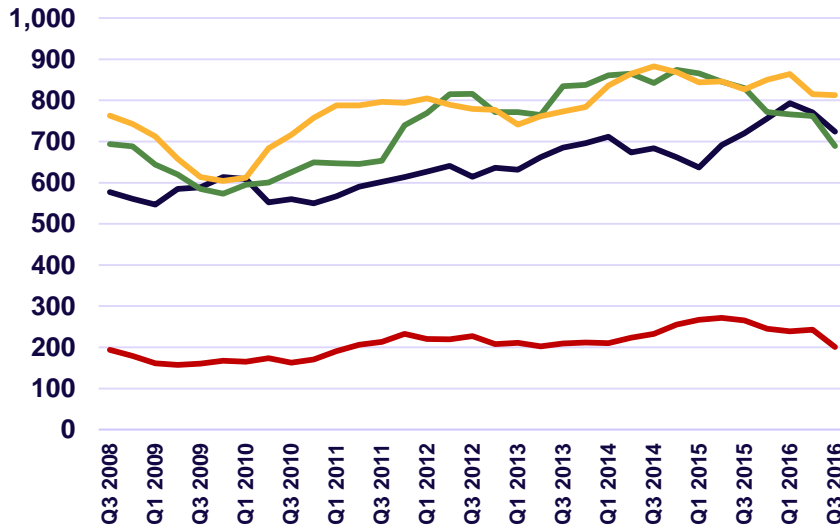
Visits from the Nordics have been more mixed compared to other parts of Europe. **Denmark** visits have increased 1% although the last 3 quarters have been weak. **Finland**, the smallest of the Nordic countries in terms of UK visits, saw growth in Q2 and Q3, although the 12 month period is down overall.

**Norway's** visits and spend both decreased in the latest 12 months, with steady decline across each quarter.

After a slight decline during 2015, **Sweden** recovered during the first quarter, back close to the highs seen in 2014, however dropped off again in Q2 and Q3.



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



	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Denmark	529	£255	724	£340
Finland	201	£106	256	£130
Norway	502	£301	689	£401
Sweden	584	£300	813	£420

Source: International Passenger Survey

# Eastern Europe

Amongst the Eastern European markets, visits from **Poland** saw strong growth from 2011, and the latest 12 month period sets a record at 1.8 million visits. Visits from **Romania** also continue to grow rapidly, and the latest 12 month period set a new record at 829,000 visits.

**Czech Republic** experienced growth throughout 2015, and the latest 12 months are up 15%. Following a weaker Q4 2015 and Q1 2016, **Hungary** saw growth in Q2 and Q3, although visits across the latest rolling year are still down 11%.

Meanwhile **Russia** continues the downward trend due to weaker visit numbers each quarter, although Q3 is stable.

**% change in visits  
(Oct 15-Sept 16 v Oct 14-Sept 15)**

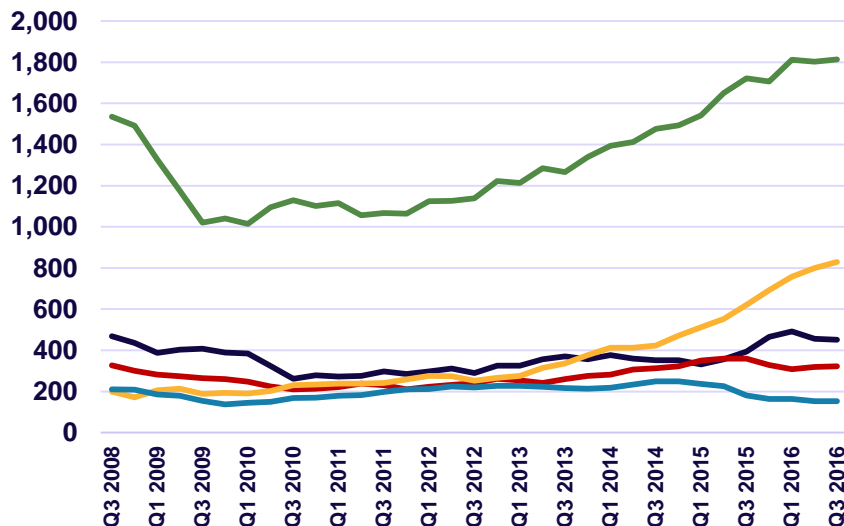


**% change in spend  
(Oct 15-Sept 16 v Oct 14-Sept 15)**



Czech Rep	Hungary	Poland	Romania	Russia
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**Inbound visits from Eastern Europe markets  
(000s), latest rolling 12 months total**



	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Czech Rep	305	£122	452	£158
Hungary	263	£59	322	£69
Poland	1,419	£292	1,814	£414
Romania	594	£221	829	£284
Russia	113	£87	153	£113

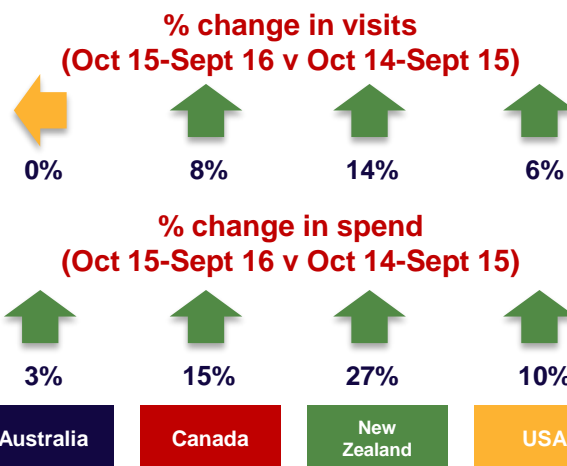
# English-speaking long-haul

The **USA**, one of the UK's biggest inbound markets, saw strong growth in Q3, boosting the 12 month period by 6% to 3.4 million visits.

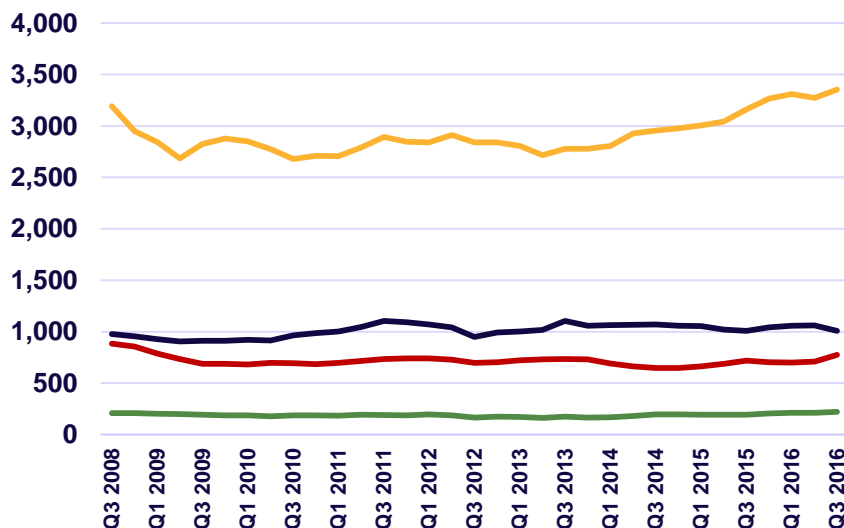
Visits from **New Zealand** were up in Q3, and the last year has seen growth of 14%.

**Australia** visits were down for the latest quarter, and stable over the last 12 months.

**Canada** visits were low throughout 2014, but have since started to make a gradual recovery and the current 12 months are tracking 8% higher than previous, although still short of the 2008 highs.



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

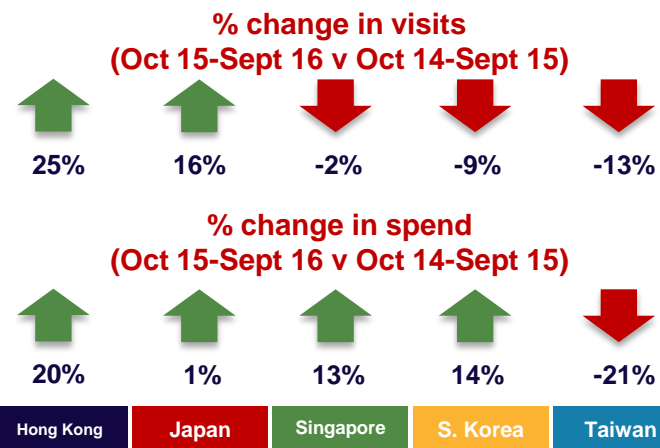


	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
<b>Australia</b>	790	£849	1,009	£1,102
<b>Canada</b>	643	£505	775	£604
<b>New Zealand</b>	181	£172	221	£234
<b>USA</b>	2,678	£2,487	3,354	£3,219

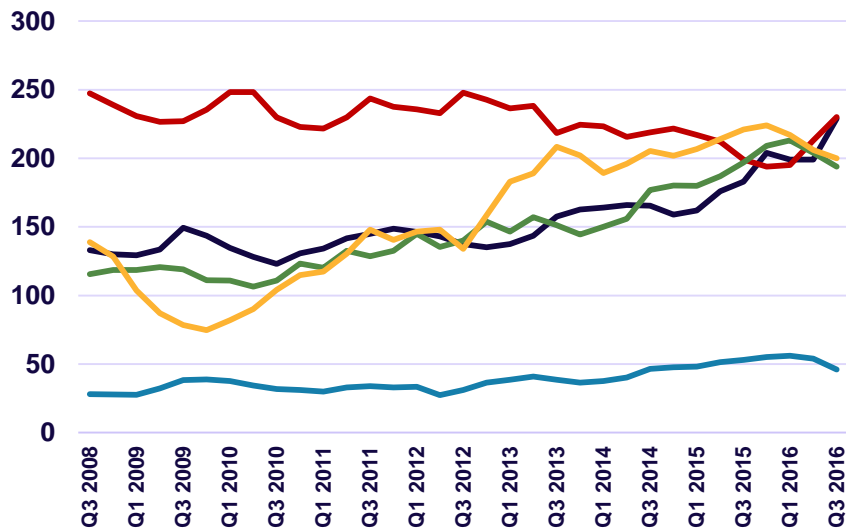
# Advanced Asia

**Hong Kong** visits are up due to strong Q2 and Q3, to record breaking visit numbers for the last 12 months. **Japan** visits have grown consistently this year, and are up 16% after a dip in recent years.

**Singapore** visits are down slightly after peaking towards the end of 2015. Visits from **South Korea** have decreased each quarter of 2016, after a strong performance in 2015, meaning that visits are down 9%. As a smaller market for inbound tourism, **Taiwan** numbers can be more volatile and both visits and spend are down compared to the previous 12 months.



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



	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
<b>Hong Kong</b>	180	£207	229	£275
<b>Japan</b>	185	£174	230	£218
<b>Singapore</b>	136	£227	194	£335
<b>South Korea</b>	164	£119	200	£151
<b>Taiwan*</b>	38	£43	46	£58

Source: International Passenger Survey

\*Sample size less than n=100

# Emerging Asia

Visits from **China** decreased in 2016 after a record breaking 2015. Due to a strong Q4 2015, the 12 month period is still up 4% for visits.

**India** continues to generate high volumes of visits, however Q2 and Q3 decreased meaning that visits are currently tracking 5% lower for the last 12 months.

Visits from **Malaysia** continue to grow, driven by a strong Q2, although the latest 12 month period falls just short of the record set last quarter.

**Thailand** is a smaller inbound market, and visit numbers are higher in the 12 months to Q3 2016; however, spend has not matched the visits growth.

**% change in visits  
(Oct 15-Sept 16 v Oct 14-Sept 15)**

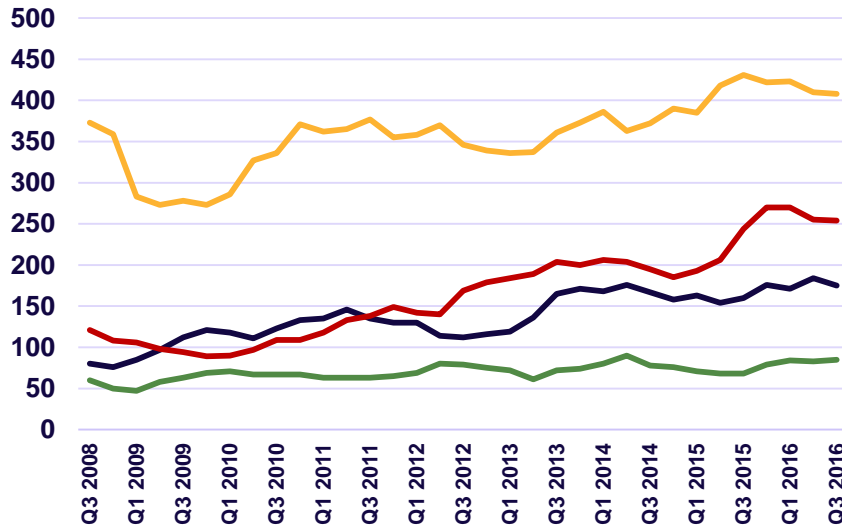


**% change in spend  
(Oct 15-Sept 16 v Oct 14-Sept 15)**



China Malaysia Thailand India

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



	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
China	200	£375	254	£523
Malaysia	124	£152	175	£220
Thailand*	61	£65	85	£86
India	328	£328	408	£431

# The Gulf

After strong growth in the first half of 2016, Q3 visits dipped slightly for the **UAE**. **Saudi Arabia** visits continue to grow although are still short of the highs achieved mid 2014. **Qatar** had a strong Q3 for visits, and the most recent 12 month period set a new record at 79,000 visits.

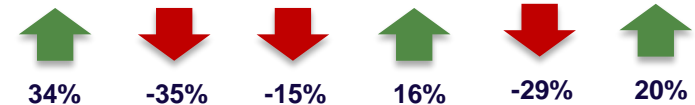
**Bahrain** and **Oman** show an increase in visits, but spend remains down for Oman.

**Kuwait** visits are down 4% in the latest year, with spend down across all quarters.

**% change in visits  
(Oct 15-Sept 16 v Oct 14-Sept 15)**

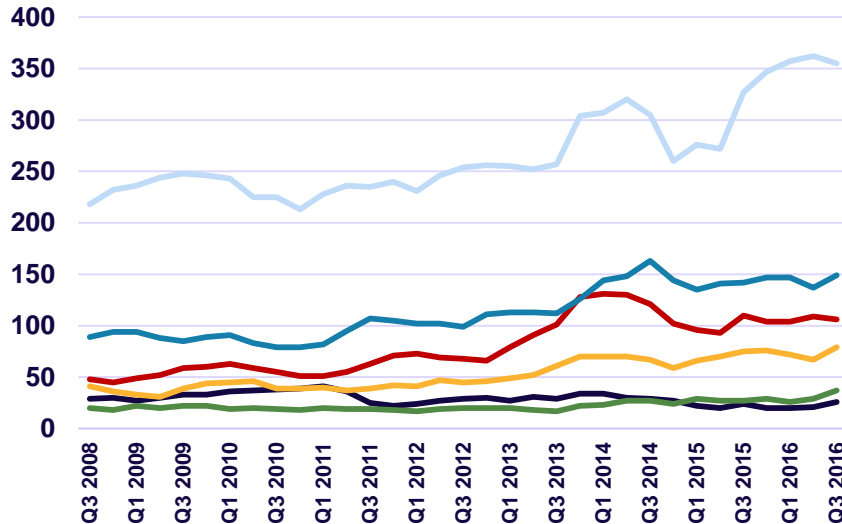


**% change in spend  
(Oct 15-Sept 16 v Oct 14-Sept 15)**



Bahrain    Kuwait    Oman    Qatar    Saudi Arabia    UAE

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



	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Bahrain**	22	£46	26	£51
Kuwait	88	£176	106	£226
Oman*	31	£31	37	£41
Qatar	65	£134	79	£174
Saudi Arabia	119	£283	149	£367
UAE	282	£436	355	£542

Source: International Passenger Survey

\*Sample size less than n=100

\*\*Sample size less than n=50



# Rest of Middle East & Africa

**Nigeria** Q3 visits are up slightly, but visits have declined for the rest of the past 12 months, meaning visits have fallen overall 22% to 106,000. **South Africa** experienced a decrease in visits throughout 2016, meaning that visits for the last 12 months are down 9%. **Israel** experienced a strong Q3, pushing visit numbers up to a new record at 225,000 visits in the 12 months to September 2016. After peaking in 2014, visits from **Egypt** have plateaued over the past 12 months at 46,000.

Visit numbers from **Turkey** are up in Q3, contributing to a strong year to date and record breaking figures for the 12 month period at 207,000 and spend up 45%.

**% change in visits  
(Oct 15-Sept 16 v Oct 14-Sept 15)**

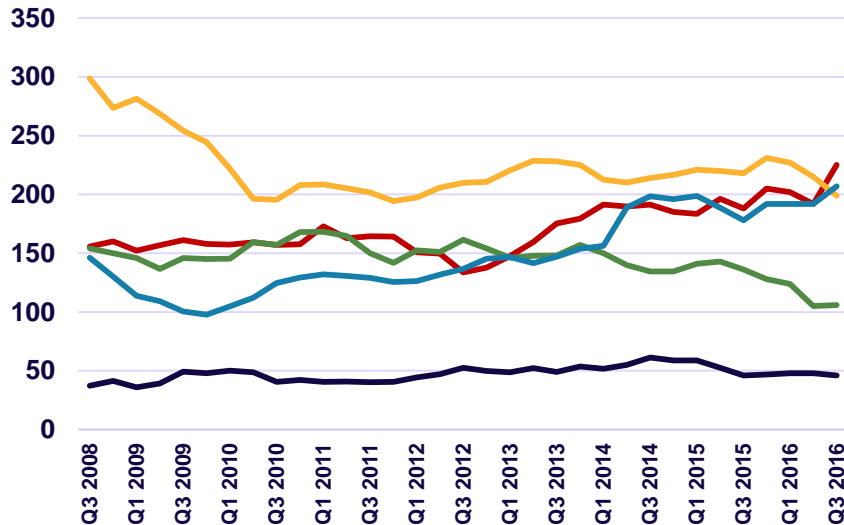


**% change in spend  
(Oct 15-Sept 16 v Oct 14-Sept 15)**



Egypt	Israel	Nigeria	S. Africa	Turkey
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**Inbound visits from Middle East and Africa markets (000s), latest rolling 12 months total**



	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Egypt*	32	£46	46	£72
Israel	164	£104	225	£190
Nigeria	79	£140	106	£181
South Africa	142	£144	199	£220
Turkey	151	£169	207	£205

# Latin America

**Brazil's** decline in visits continues, with visits at a low throughout 2016 although spend for the last 12 months is up, boosted by a stronger Q4 2015 and Q3 2016.

**Argentina**, though a smaller inbound market for the UK, experienced growth in visits throughout Q2 and Q3, and the 12 months to September 2016 set a visit record of 136,000.

**Mexico** visits have grown when looking at the long term trend, however have plateaued during 2016, up just 2% on the previous 12 months.

**% change in visits  
(Oct 15-Sept 16 v Oct 14-Sept 15)**

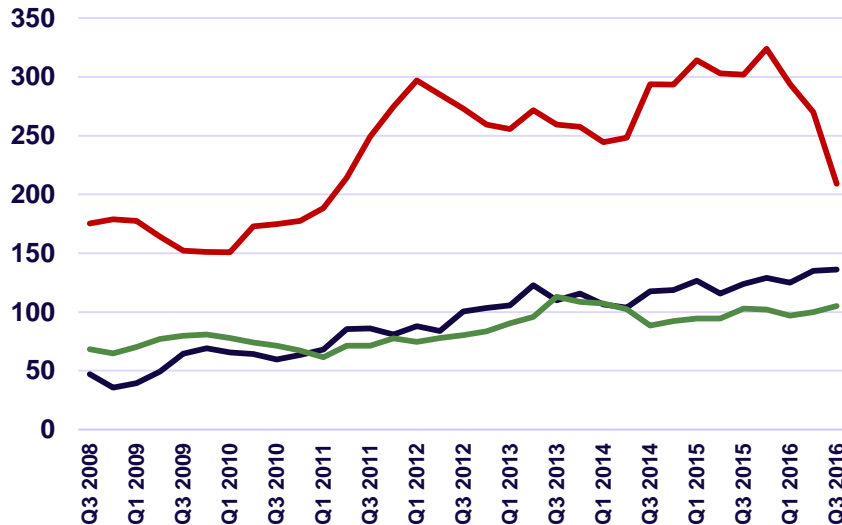


**% change in spend  
(Oct 15-Sept 16 v Oct 14-Sept 15)**



Argentina Brazil Mexico

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



	Year to date (Jan – Sept 16)		Rolling 12 months (Oct 15 – Sept 16)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Argentina	115	£74	136	£92
Brazil	143	£160	209	£236
Mexico	86	£48	105	£59

# 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

**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 January 2017