

Inbound Tourism Trends Quarterly Quarter 3 2019

February 2020

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About this data

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

The last Quarterly Release (July – September 2019) was released on 24th January 2020. It provides data on visits by market and UK region visited up to Q3 2019. On the same day, provisional monthly data for October 2019 was released too. The next data release on 28th February 2020 will include provisional data for November and December 2019. The annual release for 2019, which will contain some revisions to the quarterly data, will be in May 2020.

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 3.8% on 2018.

Visits to Europe overall were up 3.7% and to the EU up 2.7%. Within Europe, there was variation with Northern Europe (which includes the UK) up 2.6%, Western Europe up 1.8%, Central/Eastern Europe up 3.9% and Southern Europe up 5.5%.

Globally, the highest growth in visits to 2019 has been in the Middle East, where arrivals were up 7.6%, followed by Asia Pacific with 4.6% and Africa with 4.2%. Visits to the Americas were up by the weakest rate of 2.0%.

International tourist arrivals between July and September 2019 overall increased 3.5% on those months in 2018. Results for inbound visits to Europe in 2019 are following a similar trend with inbound arrivals in Q3 2019 up 3.7% on Q3 2018.

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

Destination continents	2019 arrivals	Change on 2018	Change for Q3 2019 vs Q3 2018*
World	1,461	3.8%	3.5%
Europe	742	3.7%	3.7%
Asia Pacific	364	4.6%	3.2%
Americas	220	2.0%	2.3%
Africa	71	4.2%	4.0%
Middle East	64	7.6%	7.1%

Economic outlook

Looking forward, the coronavirus outbreak could put at risk the fragile global economic outlook, despite its full impact being unknown yet.

Eurozone: the Q3 2019 outcome exceeded expectations, but unexpected contractions in France and Italy brought Q4 down to the slowest GDP growth pace in 6 years: 0.1% growth vs. the previous quarter. Despite some improvement in the Economic Sentiment Indicator in January, the GDP growth forecast for 2020 was revised down to 0.8%.

USA: in late 2019, the USA experienced cooler growth and GDP growth is expected to slow down from 2.3% in 2019 to 1.6% in 2020. The Federal Reserve is expected to cut its rate at least once in 2020. Employment is showing quite a positive outlook though, and business investment stabilising.

China: GDP growth in Q3 and Q4 2019 stabilised at 6% after a slowdown in previous quarters. In 2020, GDP is expected to remain at 6%. However, the coronavirus poses a serious risk.

India: Q4 2019 growth is expected to be relatively modest (4.3%). New policies should create a favourable frame for recovery in 2020.

At time of writing, the **oil price** currently averages \$55 in February 2020, down on January (\$65).

GDP growth	2018	2019	2020	2021
Australia	2.7%	1.8%	1.9%	2.8%
Canada	2.0%	1.7%	1.4%	1.6%
France	1.7%	1.2%	0.9%	1.5%
Germany	1.5%	0.6%	0.7%	1.2%
Ireland	8.3%	5.4%	2.4%	2.1%
Italy	0.7%	0.2%	0.0%	0.5%
Netherlands	2.5%	1.7%	1.3%	1.2%
Poland	5.1%	4.2%	3.1%	2.5%
Spain	2.4%	2.0%	1.6%	1.5%
Sweden	2.3%	1.2%	1.2%	1.8%
Switzerland	2.8%	0.8%	1.5%	1.3%
UK	1.3%	1.3%	1.0%	1.9%
USA	2.9%	2.3%	1.6%	1.8%
Brazil	1.3%	1.2%	2.2%	2.3%
China	6.7%	6.1%	6.0%	5.8%
India	7.4%	4.9%	5.6%	6.2%
Russia	2.2%	1.3%	2.1%	1.6%
World	3.6%	2.9%	3.3%	3.4%

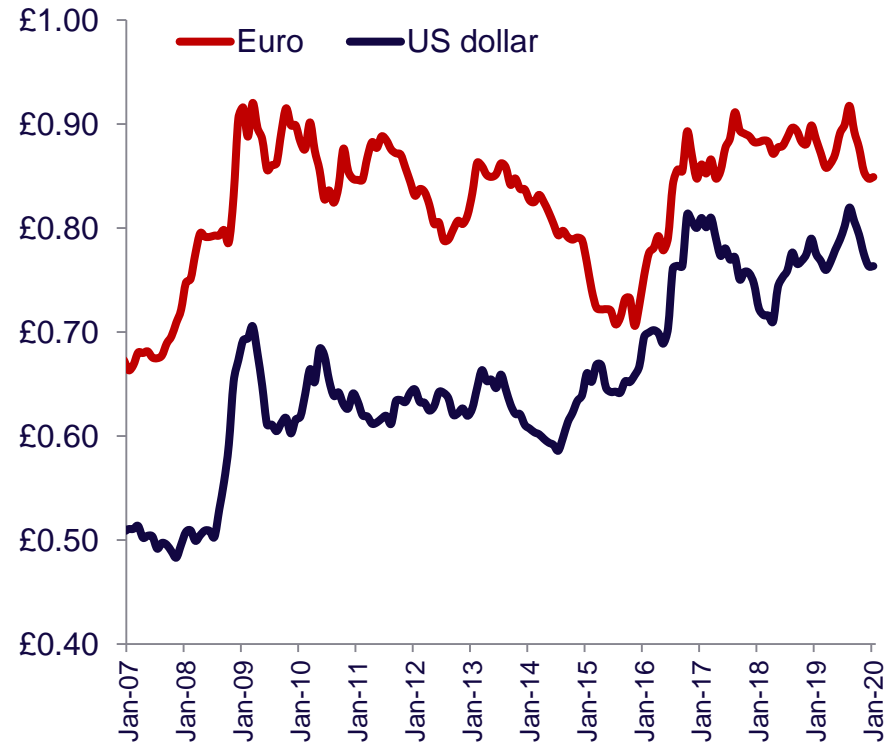
Exchange rate

The pound has recently started to appreciate again and reached €1.18 and \$1.31 on average in January 2020, up from €1.09 and down from \$1.22 last August.

Against the US dollar, the pound was up 1% year on year in January 2020, but still 6% down on January 2018. It was up 4% against the euro year on year, as well as compared to two years ago, as the exchange rate was also quite weak in January 2018.

Looking at Q3 2019, the pound averaged €1.11 and \$1.23, down 1% against the euro vs. Q3 2018, and down 5% against the dollar.

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

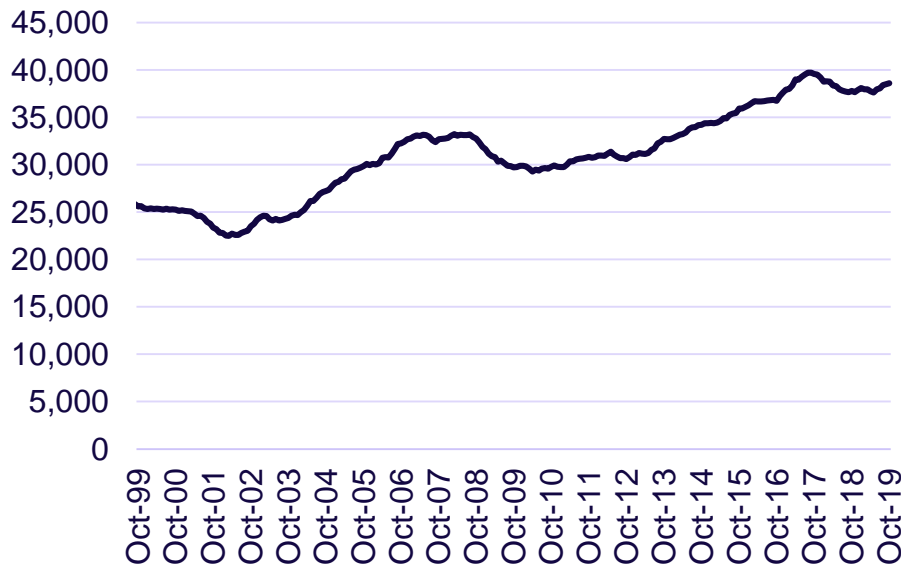
In Q3 2019 there were 11.4 million international visits to the UK, setting a new record. Those arrivals increased by 5% on Q3 2018.

Visits from January – September 2019 grew by 2% on the same period in 2018, with 29.4 million visits, achieving the second best first nine months of the year behind the 2017 record.

Visits in the 12-month period to September 2019 were up 2% compared to visits in October 2017 – September 2018.

In October 2019, the UK received 3.4 million overseas visits, up 3% year-on-year (YoY).

Inbound visits (000s), rolling year ending



	Visits (000s)	Growth
Latest full year (2018)	37,905	-3%
Q3 2019	11,358	+5%
January-September 2019	29,360	+2%
Rolling 12 months to September 2019	38,523	+2%
October 2019	3,430	+3%

Inbound value

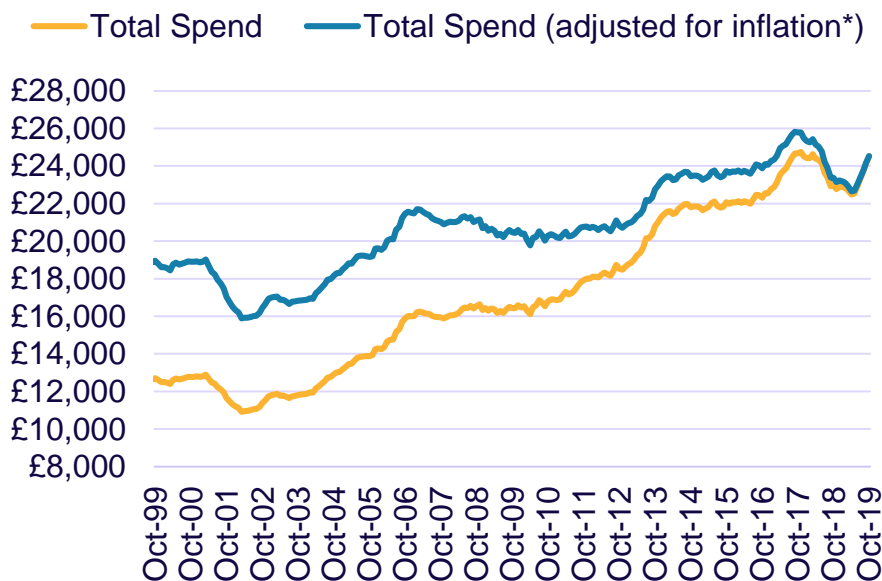
2018 finished with spending levels down 7% on the previous 2017 record.

Q3 2019 spending grew 18% vs Q3 2018, to a record £8.4 billion. Thanks to this, spend in the first nine months of 2019 was up 7% on January – September 2018 to £18.9 billion, the second best first nine months of the year behind the 2017 record.

Looking at the rolling 12 months to September 2019, spend is up 5% on October 2017 – September 2018 spending levels.

In October 2019, inbound visitors spent £2.3 billion, up 19% on October 2018.

Inbound spend (£m), rolling year ending



	Spend (£m, nominal terms)	Growth
Latest full year (2018)	£22,897	-7%
Q3 2019	£8,430	+18%
January-September 2019	£18,924	+7%
Rolling 12 months to September 2019	£24,157	+5%
October 2019	£2,320	+19%

Source: International Passenger Survey; 2019 figures are provisional and will be revised with the next quarterly and annual releases

*Adjusted for inflation based on October 2019 price level

Journey Purpose trends

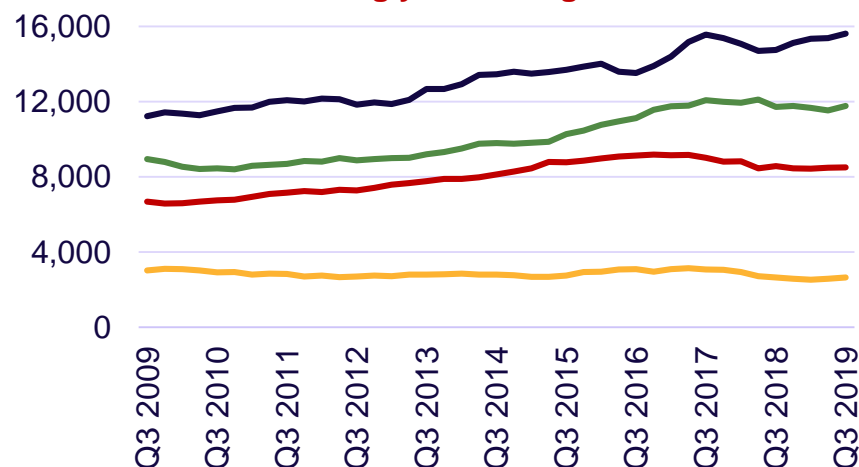
Holiday visits and spend in the first nine months of 2019 were both up on January – September 2018. Visits were up 4% to 12.2 million, the second best first nine months of the year behind the 2017 record. Spend rose 11% to £9.1 billion, a new record for holiday spend in those months.

Journeys to visit friends or relatives (**VFR**) increased in Q3, with January – September 2019 visits on par and spend up by 4% on January – September 2018, to 8.8 million visits and £4.4 billion of VFR spend.

Business visits were up 1% to 6.4 million, and spending up 14% on the nine months of 2018, with £3.9 billion spent.

Visits for **miscellaneous purposes** (including study) grew 4% to 2.0 million visits but spend fell by 15% year-on-year in January – September 2019.

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



	Jan – Sep'19 visits (000s)	Year to Date 2018	Jan – Sep'19 spend (£m)	Year to Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
Holiday	12,189	+4%	£9,054	+11%	15,618	+6%	£11,230	+11%
Business	6,409	+1%	£3,885	+14%	8,495	-1%	£4,996	+4%
VFR	8,761	0%	£4,397	+4%	11,764	0%	£5,841	+5%
Misc.	2,001	+4%	£1,560	-15%	2,646	0%	£2,051	-15%

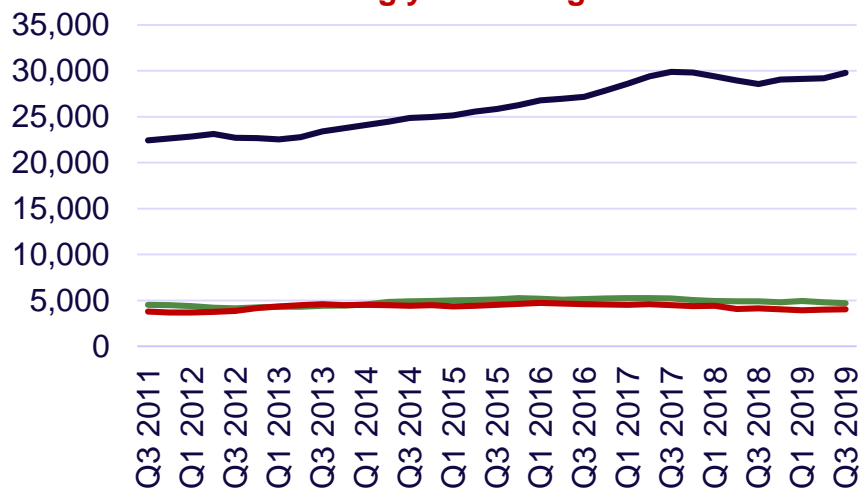
Transport mode

Travel via **air** increased 3% in the first nine months of 2019 compared to those months in 2018, with 22.4 million visits made to the UK by air. Those visitors also spent 9% more than the air visitors in January – September 2018, both visits and spend behind the 2017 record

Visits to the UK via **tunnel** were on par year-on-year in the first nine months of 2019, whilst spend dipped by 16%.

Visits to the UK departing via the **sea** in January – September 2019 were just behind those in the first nine months of 2018, down 3% with 3.8 million visits. However, there was record spending by those inbound visitors in the UK up 15% to £1.5 million.

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



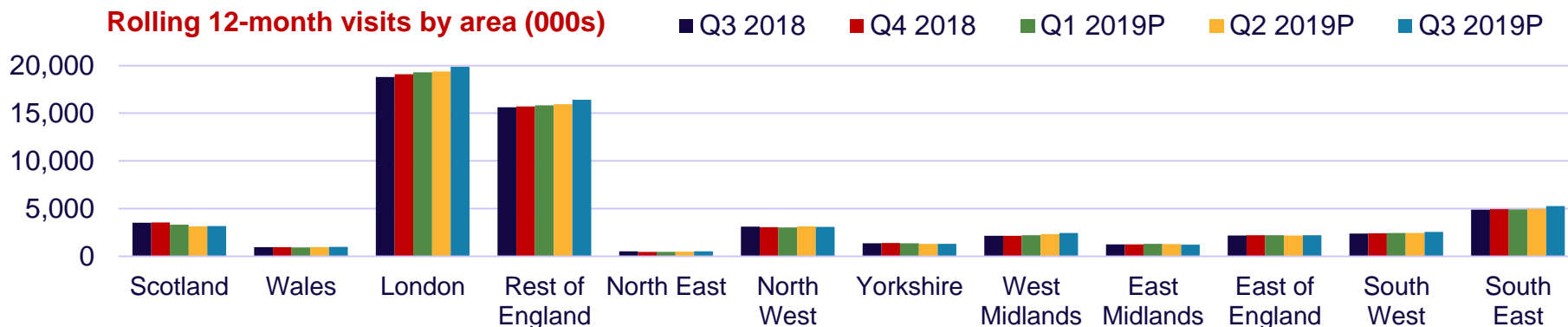
	Jan – Sep'19 visits (000s)	Year to Date 2018	Jan – Sep'19 spend (£m)	Year to Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
Air	22,434	+3%	£16,283	+9%	29,773	+4%	£20,976	+7%
Tunnel	3,124	0%	£1,182	-16%	4,043	-2%	£1,457	-18%
Sea	3,801	-3%	£1,459	+15%	4,708	-4%	£1,724	+15%

Area visited

In January to September 2019, many regions saw year-on-year (YoY) growth in visits, with double-digit growth in the **North East** (+10%) and the **West Midlands** (+18%) - reaching new records for the **West Midlands**. Although visits to the **North West** increased by 1%, the region matched the 2017 record of 2.4 million visits. However, visits to **Scotland** fell by 13%, to **Yorkshire** by 9% and to the **East Midlands** by 4%.

Spend results show that most nations and regions showed growth, except for 3 English regions. Inbound spending in **Rest of England**, **Scotland** and the **West Midlands** reached new records with £6.3 billion, £2.0 billion and £767 million respectively. The only declines were in **Yorkshire** (-8%), the **East Midlands** (-12%) and the **North East** (-15%).

January-Sep 2019	Visits (000s)	Growth	Spend (£m)	Growth
Total UK	29,360	+2%	£18,924	+7%
Scotland	2,525	-13%	£1,959	+5%
Wales	820	+4%	£358	+12%
London	15,037	+5%	9,976	+7%
Rest of England	12,647	+6%	6,252	+9%
North East	413	+10%	216	-15%
North West	2,400	+1%	1,070	+3%
Yorkshire	976	-9%	409	-8%
West Midlands	1,911	+18%	767	+21%
East Midlands	890	-4%	322	-12%
East of England	1,656	+1%	706	+38%
South West	2,055	+8%	1,007	+8%
South East	4,115	+9%	1,751	+13%



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 Q3 2019 vs Q3 2018:

- **Australia:** visits reached a new record for Q3 2019 up 24% to 458,000 visits and spend up 21% to £449 million.
- **Belgium:** visits grew 6% to 314,000 visits with spend up 38% to a record £117 million.
- **China:** reached 182,000 visits a new record, while spending grew 10% to £297 million.
- **France:** visits were up 10% to 931,000 and spend up 11% to £440 million.
- **Germany:** visits grew by 1% to 952,000 and spend increased by 15% to £516 million.
- **GCC**:** visits were up 19% to a record 385,000 visits, with spend growing by 3%.
- **India:** visits and spend set new records, visits were up 12% to 196,000 with spend up 47% to £251 million.
- **Italy:** visits were up 7% YoY to a record 548,000, spend also increased to £344 million, up 33% (but no record).
- **Netherlands:** visits were up 3% to 542,000, with spend setting a new record of £246 million, up 21%.
- **Poland:** visits were up 11% to a record 489,000 visits, with spend increasing 23% to £169 million.
- **USA:** visits and spend both created new records with visits up 16% to 1.5 million and spend up by 39% to £1.5 billion.

Q3 2019	Visits (000s)	Growth	Spend (£m)	Growth
Australia	458	+24%	£449	+21%
Belgium	314	+6%	£117	+38%
Canada	301	-1%	£245	-3%
China	182	+13%	£297	+10%
France	931	+10%	£440	+11%
Germany	952	+1%	£516	+15%
GCC*	385	+19%	£751	+3%
Hong Kong	103	+21%	£145	+27%
India	196	+12%	£251	+47%
Irish Republic	724	-11%	£211	-12%
Italy	548	+7%	£344	+33%
Netherlands	542	+3%	£246	+21%
Norway	161	-8%	£146	+37%
Poland	489	+11%	£169	+23%
Romania	208	-13%	£92	-29%
Spain	532	-20%	£280	-14%
Sweden	188	-26%	£106	-21%
Switzerland	211	+1%	£169	+61%
USA	1,545	+16%	£1,503	+39%

Source: International Passenger Survey; 2019 figures are provisional and will be revised with the next quarterly and annual releases

Please note that base sizes by market at the quarterly level can be small and spend data in particular should be treated with caution

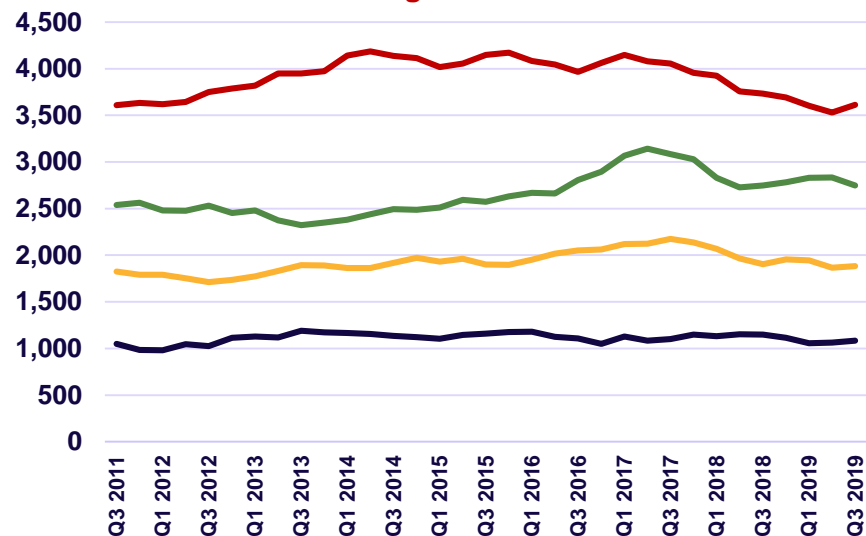
*GCC includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE

North West Europe

North West Europe provides some of our highest levels of visits to the UK. Visits from **France** declined 3% in the first 9 months of 2019 compared to those months in 2018, with spend down 5%. Visits in October 2018 to September 2019, were down 3% and spend down 9%. Visits from **Irish Republic** from January-September 2019 were down 2% and in the 12 months to September 2019 were on par with the same period in 2017-2018. Visitors spent less in both time periods: -8% and -5% respectively.

Belgium and **Netherlands** both show downward trends in visits, with Belgium also seeing decreases in spend. However, the Netherlands saw 3% growth in spending for the first 9 months of 2019, mainly due to a record Q3, and a 9% increase for the 12 months to September 2019.

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

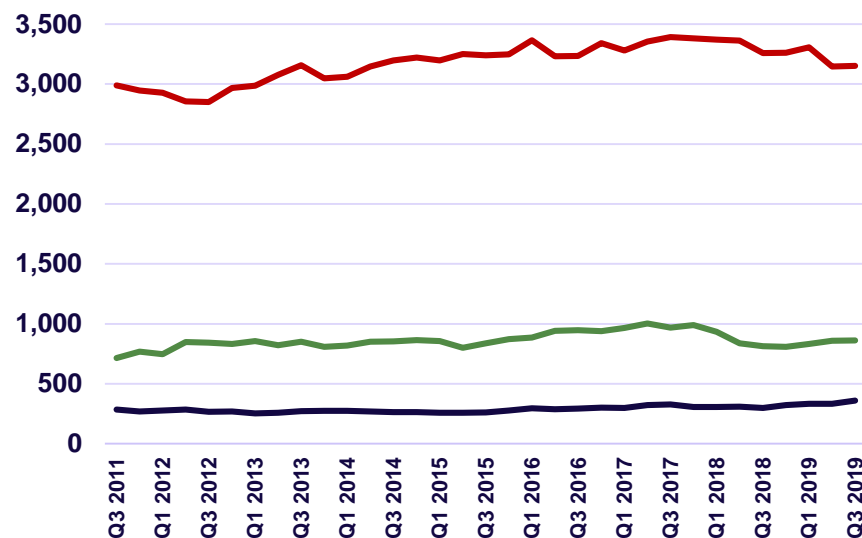


	Jan – Sep'19 visits (000s)	Year to Date 2018	Jan – Sep'19 spend (£m)	Year to Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
Belgium	830	-4%	£245	-17%	1,083	-5%	£349	-9%
France	2,714	-3%	£1,017	-5%	3,614	-3%	£1,328	-9%
Irish Republic	2,032	-2%	£618	-8%	2,749	0%	£840	-5%
Netherlands	1,376	-5%	£551	+3%	1,883	-2%	£734	+9%

Central Europe

Germany is in the UK's top three inbound markets for both volume and value. Visits in January-September 2019 and in the last 12 months to September 2019 were down 4% and 3% respectively, with spend growing in both periods, by +3% and +7% respectively. Visits from **Switzerland** were up 9% YoY in the first 9 months of 2019 and up 6% over the 12 months to September 2019 compared to the previous 12-month period. Spend levels also increased 15% and 8% respectively on the same periods the year before. January to September 2019, inbound results from Visits from **Austria** grew, creating a record with +16% on January-September 2019 and +21% for the 12-month period to September 2019. Spend also saw an increase of very robust growth in both periods.

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



	Jan – Sep'19 visits (000s)	Year to Date 2018	Jan – Sep'19 spend (£m)	Year to Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
Austria*	278	+16%	£151	+44%	361	+21%	£193	+45%
Germany	2,382	-4%	£1,173	+3%	3,153	-3%	£1,558	+7%
Switzerland	633	+9%	£395	+15%	862	+6%	£512	+8%

Southern Europe

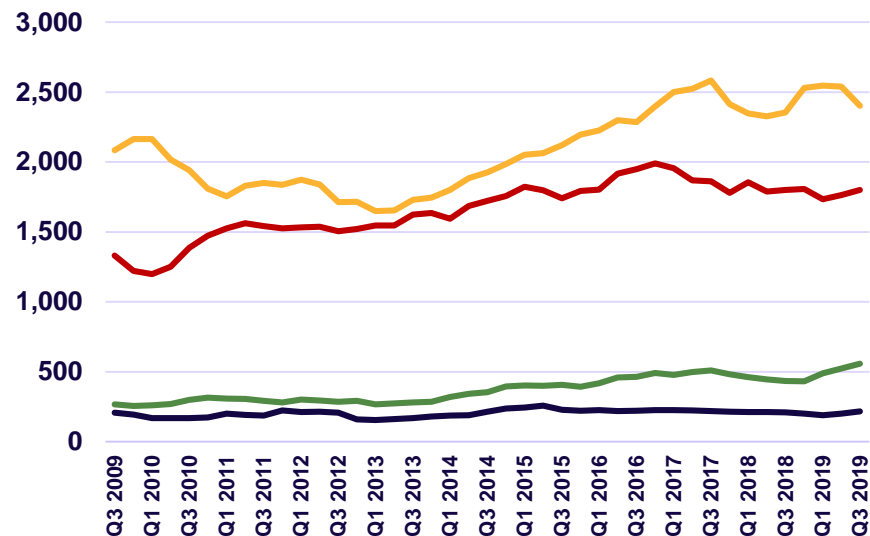
In the first 9 months of 2019, visits and spend from **Spain** dipped by 7% and 9% respectively. But, in the 12-month period to September 2019 there was 2% growth in visits and a 3% growth in spend.

Visits from **Italy** in the period January-September 2019 were on par with the same period in 2018, but spend was up 17%. Looking at the 12 months to September 2019, visits were on par YoY, and spend up 4%.

Portugal recovered from a sluggish 2018 with record spending and visits in the first 9 months of 2019. Growth over the 12 month period saw visits up 28% and spending up 34%.

Visits from **Greece** were up 12% in January-September 2019 and up 4% over the 12 months to September 2019 vs the previous 12 months, with spend up 32% and 15% respectively.

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



	Jan – Sep'19 visits (000s)	Year To Date 2018	Jan – Sep'19 spend (£m)	Year To Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
Greece	156	+12%	£94	+32%	217	+4%	£138	+15%
Italy	1,348	+0%	£701	+17%	1,801	+0%	£885	+4%
Portugal*	448	+39%	£203	+63%	557	+28%	£242	+34%
Spain	1,709	-7%	£727	-9%	2,401	+2%	£1,034	+3%

Source: International Passenger Survey; 2019 figures are provisional and will be revised with the next quarterly and annual releases. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending. *Sample size is under 100.

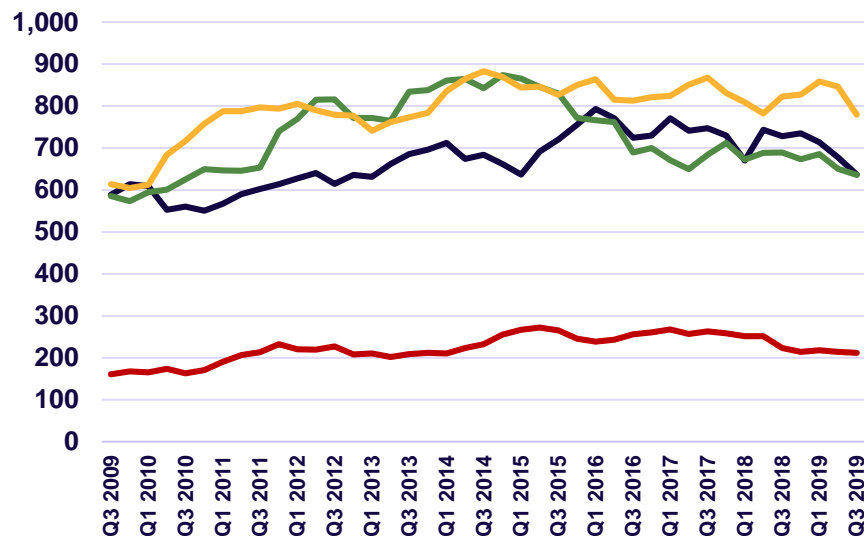
Nordics

Visits from **Sweden** in the first 9 months were down 8% and in the 12 months to September 2019 were down 5%. Meanwhile, spending suffered more during those same periods, showing double-digit declines. **Denmark** showed downward year-on-year trends in both visits and spend in January-September 2019 and the 12 months to September 2019.

Visits from **Norway** in the first 9 months of 2019 and the 12-month period to September 2019 were both down 8% YoY, with spend up 1% and down 3% respectively.

Visits from **Finland** dipped in both time periods with a 1% decline in January-September 2019 and a 5% YoY decrease in the 12 months to September 2019 YoY. However, spend was up 14% and 12% respectively.

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



	Jan – Sep'19 visits (000s)	Year To Date 2018	Jan – Sep'19 spend (£m)	Year To Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17–Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17–Sep18
Denmark	448	-18%	£214	-22%	637	-13%	320	-14%
Finland	166	-1%	£99	+14%	212	-5%	126	+12%
Norway	429	-8%	£284	+1%	636	-8%	397	-3%
Sweden	577	-8%	285	-21%	779	-5%	371	-20%

Eastern Europe

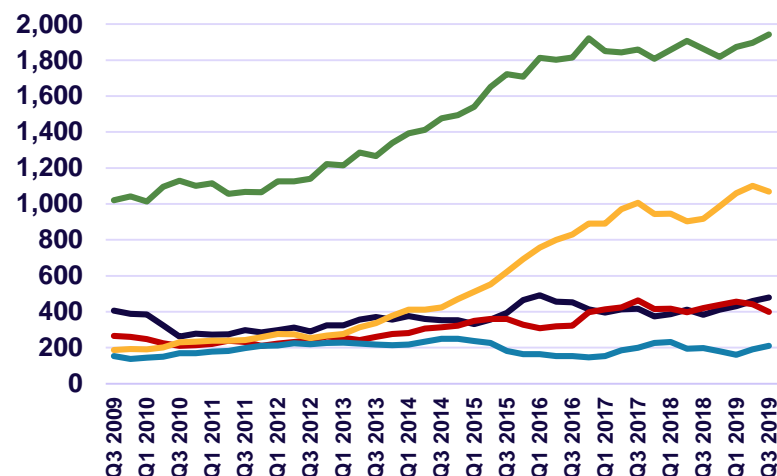
In the first 9 months of 2019, **Czech Republic** and **Romania** had record visits and spend with double-digit growth.

Visits from **Poland** set new records for January-September 2019 with a growth of 9%, and a 4% increase in the 12 months to September 2019 compared to the same period in 2018. Spend also set a record in the first 9 months of 2019 up 23%, with the 12-month period to September 2019 up 20%.

Russia had visit and spend growth across both time periods, January-September 2019 caught up with January-September 2017 levels after a sluggish January-September 2018, despite no new record being set for this market.

Hungary saw a decline in visits and spending for both time periods. However, this comes on the back of record visits and strong spending levels in January-September 2018.

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



	Jan – Sep'19 visits (000s)	Year To Date 2018	Jan – Sep'19 spend (£m)	Year To Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
Czech Rep	385	+22%	£129	+46%	480	+25%	£161	+42%
Hungary	295	-12%	£105	-3%	399	-5%	£135	0%
Poland	1,536	+9%	£414	+23%	1,943	+4%	£529	+20%
Romania	764	+12%	£377	+14%	1,069	+17%	£524	+24%
Russia	168	+22%	£146	+17%	210	+7%	£174	+3%

Source: International Passenger Survey; 2019 figures are provisional and will be revised with the next quarterly and annual releases. 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

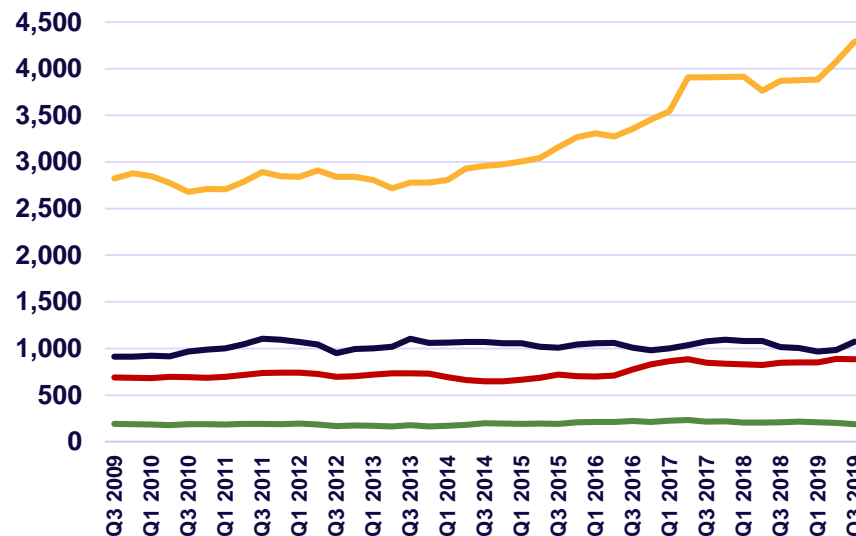
The **USA** is the UK's largest inbound market in visits and spend, and with double-digit YoY growth in the first 9 months of 2019 set new records compared to January-September 2018.

Canada reached spending records for January-September 2019 and an all time rolling 12-months record including records set in 3 out of 4 quarters. Visits also increased in the 12 months to September 2019, with new records set in 3 out of 4 quarters.

New Zealand showed downward trends in both visits and spend after record spending in 2018.

Visits from **Australia** increased YoY in the first 9 months of 2019 and the 12-month period to September 2019. Spend was also up in January - September 2019, but it struggled to maintained the October 2017 - September 2018 levels in the 12 months to September 2019.

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



	Jan – Sep'19 visits (000s)	Year To Date 2018	Jan – Sep'19 spend (£m)	Year To Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
Australia	882	+9%	£946	+6%	1,074	+6%	£1,102	-1%
Canada	707	+5%	£624	+19%	885	+5%	£776	+17%
New Zealand	144	-16%	£127	-38%	188	-9%	£178	-25%
USA	3,514	+13%	£3,352	+23%	4,291	+11%	£4,007	+16%

Source: International Passenger Survey; 2019 figures are provisional and will be revised with the next quarterly and annual releases. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending.

Advanced Asia

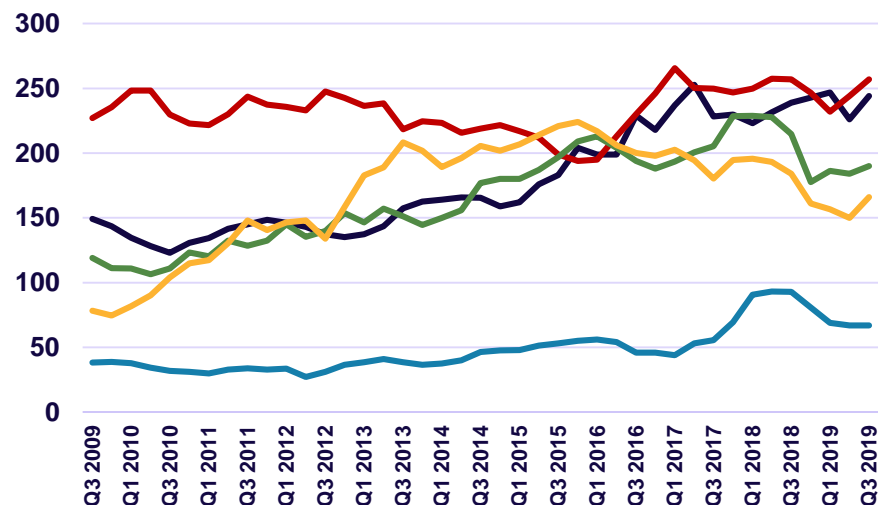
In the first 9 months of 2019 **Singapore** and **South Korea** both had increases in visits and spend with visits up 9% and 3% respectively, and spend up 19% and 24% respectively. The 12 months to September 2019 saw double-digit visit decreases and 7% and 14% increases in spend for those markets respectively.

Hong Kong saw record visits in the first 9 months of 2019 and strong growth in visits in the 12 months to September 2019, but had double-digit decreases for spend in January-September 2019.

Taiwan saw a decline in both visits and spend following record January-September 2018 figures; however, due to small sample size results are more volatile.

Visits from **Japan** were up 5% in January-September 2019 and remained on par for the 12 months to September 2019. Spend in both periods was down 14%.

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



	Jan – Sep'19 visits (000s)	Year To Date 2018	Jan – Sep'19 spend (£m)	Year To Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
Hong Kong	201	+1%	£285	-15%	244	+2%	£336	-11%
Japan	210	+5%	£204	-14%	257	+0%	£249	-14%
Singapore	152	+9%	£215	+19%	190	-11%	£254	+7%
South Korea	141	+3%	£135	+24%	166	-10%	£160	+14%
Taiwan*	56	-20%	£47	-35%	67	-28%	£59	-34%

Emerging Asia

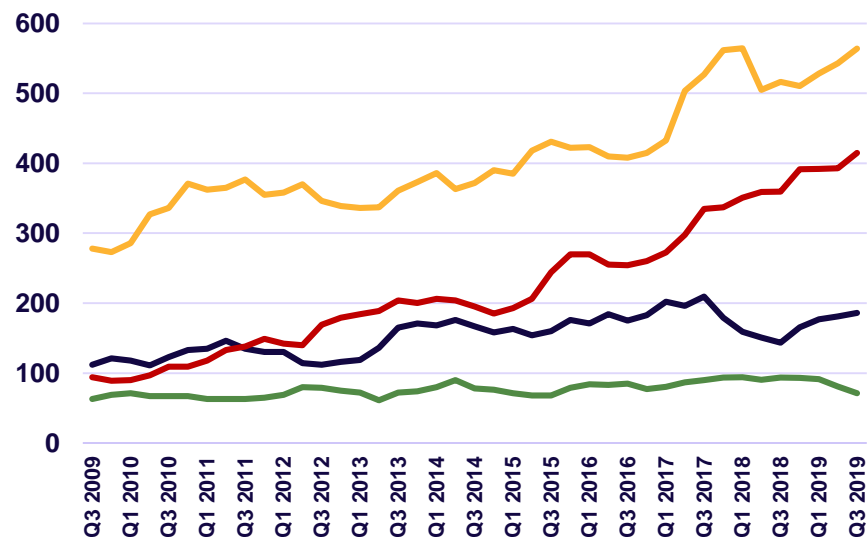
Visits from **China** reached a new record in the first 9 months of 2019, up 8%, whilst **India** reached record level of inbound visits and spending in those months, with visits up 13% and spend up 44%.

Malaysia had a 18% increase in visits and was down 2% for spend in the first 9 months of 2019.

Thailand* had double-digit declines in both spend and visits for the same time period due to record spend and visits in January-September 2018. It also saw double-digit declines in both visits and spend for the 12 month period to September 2019.

Looking at the 12-month rolling trends, visits and spend from **China, India** and **Malaysia** continued growing.

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



	Jan – Sep'19 visits (000s)	Year To Date 2018	Jan – Sep'19 spend (£m)	Year To Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
China	321	+8%	£553	+11%	415	+15%	£714	+15%
India	452	+13%	£499	+44%	564	+9%	£644	+47%
Malaysia	135	+18%	£126	-2%	186	+30%	£165	+5%
Thailand*	52	-30%	£62	-49%	71	-24%	£87	-39%

Source: International Passenger Survey; 2019 figures are provisional and will be revised with the next quarterly and annual releases. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending. *Sample size is under 100.

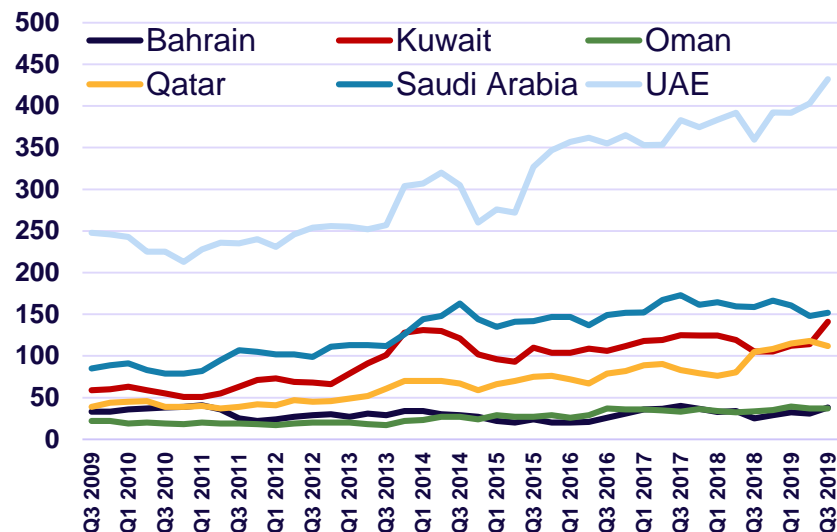
The Gulf

Both **Kuwait** and **Qatar** reported YoY growth in visits and spend in both January-September 2019 and the 12 months to September 2019. Kuwait had record visits for January-September 2019 with double-digit growth. Qatar also had records for visits in those months 2019, up 4% YoY, and spend up 25%, potentially a sign of recovery after the 2018 events in the Gulf that isolated Qatar.

Saudi Arabia fell in both the time periods of January-September 2019 with visits down 10% YoY and spend down 9%, as well as the rolling 12 months to September 2019 which was down 4% for visits and down 3% for spend on the previous 12 months.

Visits from **UAE** were up 14% in the first 9 months of 2019, setting a new record, and up 20% in the 12 months to September 2019. However, spend in January-September 2019 saw a 1% decline, whilst the 12 months to September 2019 saw 1% growth.

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



	Jan – Sep'19 visits (000s)	Year To Date 2018	Jan – Sep'19 spend (£m)	Year To Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
Kuwait	119	+42%	£254	+23%	141	+34%	£321	+21%
Qatar	96	+4%	£234	+25%	112	+7%	£274	+13%
Saudi Arabia	124	-10%	£332	-9%	152	-4%	£391	-3%
UAE	326	+14%	£482	-1%	432	+20%	£611	+1%

Source: International Passenger Survey; 2019 figures are provisional and will be revised with the next quarterly and annual releases. 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

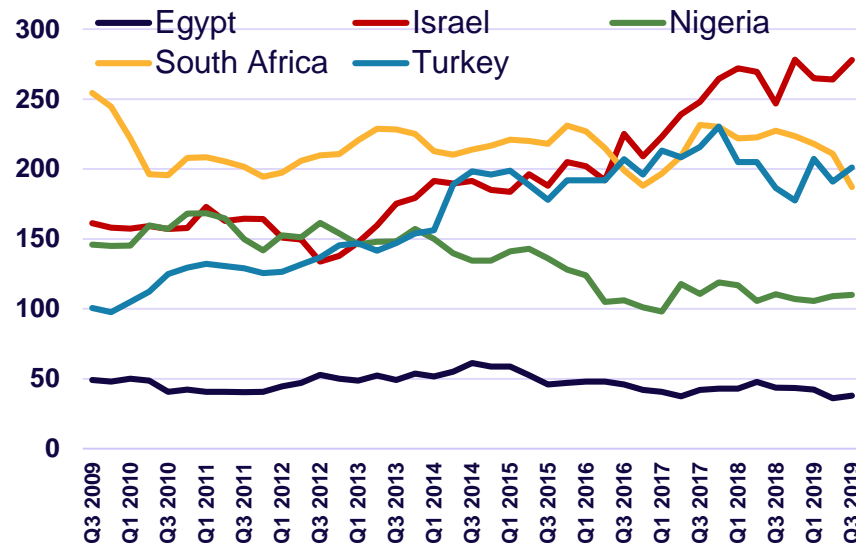
Israel: visits in the last 9 months were on par with visits in the same period in 2018. Visits in the 12 months to September 2019 were up 12%. Spend also increased on these periods with +19% and +34% respectively.

Visits from **Turkey** increased 18% and spend decreased by 2% in the first 9 months of 2019, whilst visits were up 8% and spend down 5% in the 12-month period to September 2019.

Visits from **South Africa** were down YoY over both periods for visits and spend, decreasing by double-digit rates.

However, **Nigeria** showed more positive results with YoY growth in visits and spend in the first 9 months of 2019 compared to a sluggish start of 2018, and 2% spend growth in the 12 months to September 2019.

Inbound visits from Middle East and Africa markets (000s), latest rolling 12 months total



	Jan – Sep'19 visits (000s)	Year To Date 2018	Jan – Sep'19 spend (£m)	Year To Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
Israel	187	+0%	£165	+19%	278	+12%	£255	+34%
Nigeria	84	+4%	£115	+5%	110	+0%	£158	+2%
South Africa	147	-20%	£140	-36%	187	-18%	£181	-36%
Turkey	151	+18%	£110	-2%	201	+8%	£141	-5%

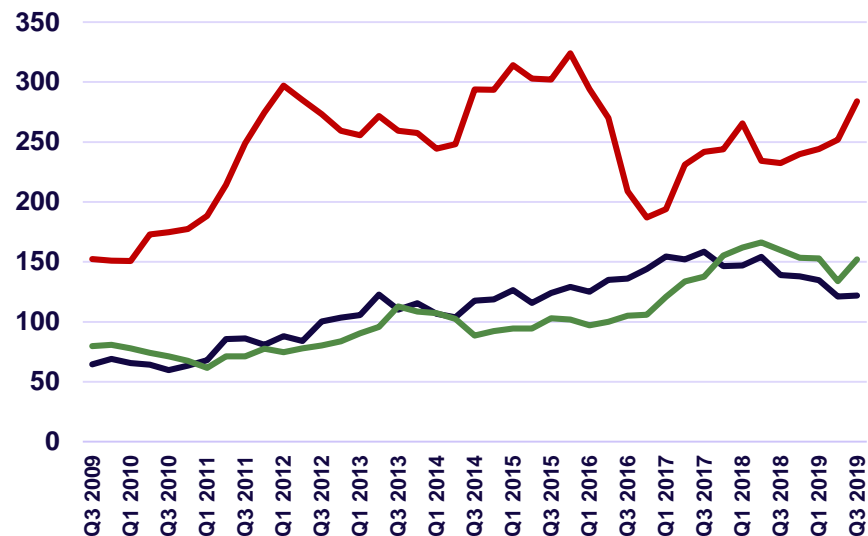
Source: International Passenger Survey; 2019 figures are provisional and will be revised with the next quarterly and annual releases. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending. Sample size for Egypt (in dark blue in the chart) is too small for short-term results to be individually shown in the table.

Latin America

Brazil showed double-digit growth in both visits in the first 9 months of 2019 and the 12 month period to September 2019 compared to those periods in 2018, up 23% and 22% respectively, as the market continues to recover. Spend also increased in both time periods by 16% and 3% respectively.

Argentina and **Mexico** are both smaller inbound markets for the UK. In the first 9 months of 2019 Argentina saw double-digit decreases in visits and spend, due to the ongoing recession. Mexico had a 1% decrease in visits but a 44% increase in spend. In the rolling 12 months to September 2019, visits and spend from Argentina also showed double-digit declines to September 2019, whilst Mexico also showed a 5% visit decrease but a 16% spending increase.

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



	Jan – Sep'19 visits (000s)	Year To Date 2018	Jan – Sep'19 spend (£m)	Year To Date 2018	Oct18–Sep19 visits (000s)	Growth on Oct17-Sep18	Oct18–Sep19 spend (£m)	Growth on Oct17-Sep18
Argentina*	106	-13%	£53	-61%	122	-13%	£61	-59%
Brazil	232	+23%	£214	+16%	284	+22%	£244	+3%
Mexico	121	-1%	£99	+44%	152	-5%	£111	+16%

Source: International Passenger Survey; 2019 figures are provisional and will be revised with the next quarterly and annual releases. Please note that sample sizes for some markets can be low and results should be treated with caution, especially for spending. *Sample size below 100 for January – September 2019.

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 Quarter 3 2019