

# Monthly Inbound Update April-June 2020

09<sup>th</sup> November 2020

# Important notice – impact of COVID-19 on IPS

The International Passenger Survey (IPS) was suspended on 16 March 2020 due to the coronavirus (COVID-19) pandemic. As of 09 November 2020 interviewing has not yet resumed. To produce statistics for the periods when IPS data is not being collected the Office for National Statistics (ONS) have applied the following processes to the data presented in this report.

## **March 2020**

As data collection was suspended part way through March, therefore the ONS had part of the data needed for the month. To produce estimates for the full month of March the ONS worked on the assumption that passenger characteristics in the second, unsampled, half of the month were represented by those sampled in the first half.

## **Q2 2020 (April, May, June)**

The travel and tourism figures for Q2 2020 are based entirely on administrative sources and modelling as no data was collected during this period. In producing these results the ONS have made assumptions that some previous trends have continued, for example, the proportions of passengers travelling for business or holidays.

The ONS have made every effort to produce high-quality estimates and have therefore not been able to produce a full set of results due to the risks associated with the results being misleading. The results do not have National Statistics status, which has been suspended from March.

# Contents

- 1. About this data**
- 2. Headlines**
- 3. Journey Purpose and Global Regions:** Q2, year to date and rolling twelve months by journey purpose
- 4. Outbound and Competitors**
- 5. Exchange rates**
- 6. Longer term trends:** Overall trends since 2003, Journey purpose since 2009, Global regions since 2008
- 7. Detailed monthly trends:** Overall visits and spend
- 8. Detailed quarterly trends:** Journey purpose (4 pages), Global regions (3 pages)
- 9. Definitions and more information**

# About this data

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

April, May, June and Q2 2020 (April – June 2020) data were released on 09<sup>th</sup> November 2020. This data may be revised when final 2020 data is released in 2021.

[Read the 'Inbound research & insights' section of the VisitBritain website](#) for much more detail on long term trends, data for individual markets and UK regions.

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

The data is based on interviews with a sample of departing visitors. The number interviewed varies but is typically around 3,000 per month, but have been impacted by the suspension of IPS data collection from 16 March 2020.

## Headlines – April, May, June 2020

|                                     | Visits (000) | Growth |
|-------------------------------------|--------------|--------|
| April 2020                          | 95           | -97%   |
| May 2020                            | 127          | -96%   |
| June 2020                           | 176          | -95%   |
| Last 3 months (Apr – Jun'20)        | 398          | -96%   |
| Year to date (Jan - Jun'20)         | 7,390        | -60%   |
| Rolling 12 months (Jul'19 - Jun'20) | 29,550       | -26%   |

**Visits:** The effects of COVID-19 on international travel really started to take hold in Q2 2020 - with lockdowns and travel restrictions prevalent around the globe. Both generating and destination countries began restricting all but essential travel. The UK saw just 4% of the inbound visits recorded in Q2 2020.

|                                     | Spend (£ million) | Growth |
|-------------------------------------|-------------------|--------|
| April 2020                          | 79                | -96%   |
| May 2020                            | 79                | -97%   |
| June 2020                           | 60                | -98%   |
| Last 3 months (Apr – Jun'20)        | 218               | -97%   |
| Year to date (Jan - Jun'20)         | 4,560             | -61%   |
| Rolling 12 months (Jul'19 - Jun'20) | 21,310            | -18%   |

**Spending:** Visitor spending was down in a similar proportion as visits in Q2 2020 – reflecting the global impact of COVID-19. Widespread restrictions and lockdowns within the UK not only affected international visitor spending, but also that of the domestic population. Inbound visitor spending in Q2 2020 totalled just £218 million.

# Journey Purpose and Global Region

Visits (000s) and growth on same period a year ago

| Journey purpose | Q2 2020 | Growth | Year to date (Jan-Jun'20) | Growth | Rolling 12 months (Jul'19-Jun'20) | Growth |
|-----------------|---------|--------|---------------------------|--------|-----------------------------------|--------|
| Holiday         | 177     | -96%   | 2,777                     | -63%   | 12,210                            | -26%   |
| VFR             | 112     | -96%   | 2,309                     | -59%   | 9,071                             | -25%   |
| Business        | 85      | -96%   | 1,746                     | -60%   | 6,103                             | -29%   |
| Miscellaneous   | 24      | -96%   | 561                       | -55%   | 2,170                             | -22%   |

| Global region | Q2 2020 | Growth | Year to date (Jan-Jun'20) | Growth | Rolling 12 months (Jul'19-Jun'20) | Growth |
|---------------|---------|--------|---------------------------|--------|-----------------------------------|--------|
| Europe        | 298     | -96%   | 5,225                     | -60%   | 19,596                            | -27%   |
| North America | 40      | -97%   | 834                       | -66%   | 3,769                             | -28%   |
| Rest of World | 60      | -97%   | 1,334                     | -60%   | 6,188                             | -22%   |

With overall inbound visit levels at just 4% of those visiting in Q2 2019, there is a similar estimated impact on all journey purposes and all global regions where data is available.

Tourism (as with many sectors around the globe) is facing a fast-moving situation and the unique circumstances, that are the source of constant change. In light of this, we acknowledge the industry is in need of some inbound tourism statistics and we have been revising our 2020 tourism forecast on a regular basis.

Our latest central scenario forecast, as at 12th October is for a 2020 decline of 74% in visits to 10.6 million and a decline of 79% in spending to £6.1 billion.

Please visit our website at <https://www.visitbritain.org/2020-tourism-forecast> for more information on this forecast and the latest update.

All data is provisional. Final 2020 data to be released in 2021.

# Outbound and Competitors

## Travel abroad by UK residents in the last three months

|                          | Apr - Jun 2020 | Change vs. Apr - Jun 2019 |
|--------------------------|----------------|---------------------------|
| <b>Visits (000)</b>      | 939            | -96%                      |
| <b>Spend (£ million)</b> | £402           | -98%                      |

UK residents took 939,000 visits abroad between April and June 2020, down 96% on the same months in 2019. These visitors spent £402 million, down 98% on April to June 2019.

Between April and June 2020 all trip purposes were down between 96% and 97%.

- Holiday 617,000 (-96%)
- Business 87,000 (-97%)
- Visit friends and family 219,000 (-96%)
- Miscellaneous 16,000 (-97%)

COVID-19 impacted all global regions by similar proportions

- North America 43,000 (-97%)
- Europe 745,000 (-96%)
- Other Countries 152,000 (-97%)

## The international picture\*

Most of the UK's main competitors shown on the table below have reported a decline in inbound arrivals in 2020 so far due to COVID-19. We will see how this situation changes throughout 2020.

Figures relate to different time periods so comparisons should be treated with caution.

| Destination     | Growth in overseas visits   | Period (Jan 2020 to ...) |
|-----------------|---|--------------------------|
| Italy           | -59%  | July                     |
| Netherlands     | -59%  | July                     |
| <b>UK</b>       | <b>-60%</b>   | <b>June</b>              |
| Germany         | -64%  | July                     |
| USA             | -66%  | July                     |
| Switzerland     | -67%  | August                   |
| Australia       | -71%  | August                   |
| Spain           | -73%  | August                   |
| Turkey          | -77%  | August                   |
| Canada          | -79%  | July                     |
| France          | no 2020 data available for France; no 2020 data beyond February available for Rep. of Ireland |                          |
| Rep. of Ireland |   |                          |

For more on outbound travel from the UK [visit the ONS website](#). \*Source: IPS for the UK, UNWTO for all other markets, periods for which we have data available vary by country, so figures are indicative and not necessarily directly comparable. 7

# Exchange rates

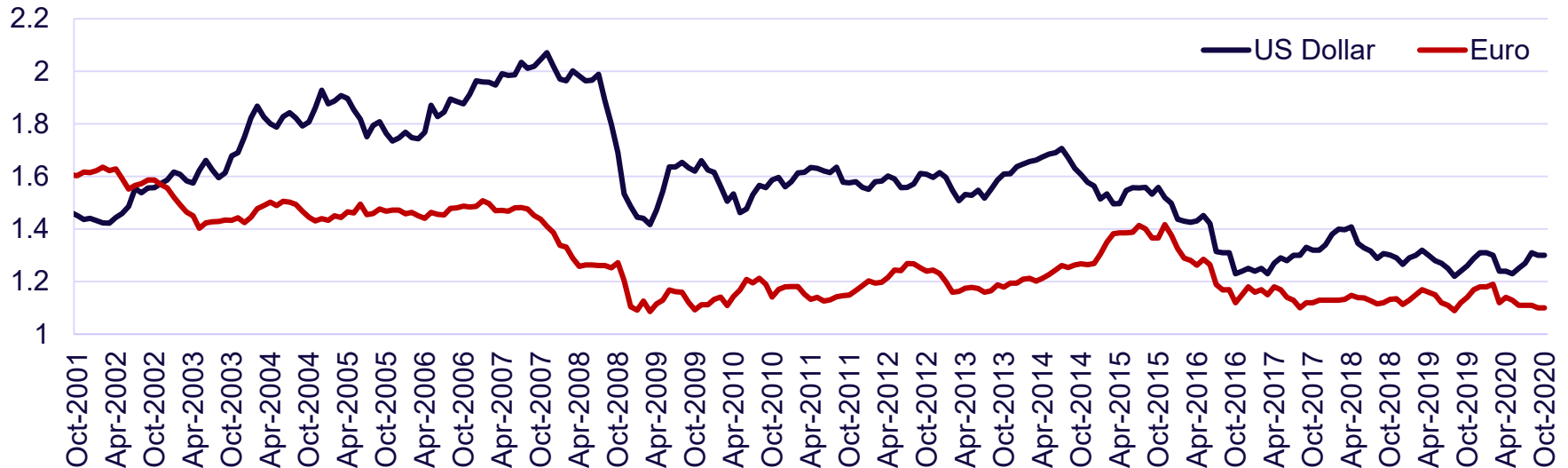
The cost of Sterling for those visiting the UK was high in 2015 but in 2016 it began to fluctuate due to political uncertainty. From late June 2016, the sharp depreciation of the pound following the referendum result made the UK a more affordable destination for many markets.

The value of Sterling against both the dollar and the euro has remained low since, although it has been fluctuating since then: it rose against the dollar in 2017 before starting depreciating again in 2018 and reaching its weakest point in August 2019, after which it started appreciating again but has lost ground again in recent months.

Sterling was down 3% year-on-year (YoY) at \$US1.30 in October 2020. Against the euro, at €1.10 in October 2020, Sterling was 4% down on its value in October 2019.

In October 2020, Sterling was down 2% against the Australian dollar, down 3% against the Chinese Yuan, and down 3% against the Canadian dollar compared to October 2019.

GBP Exchange rate: \$ / € per £

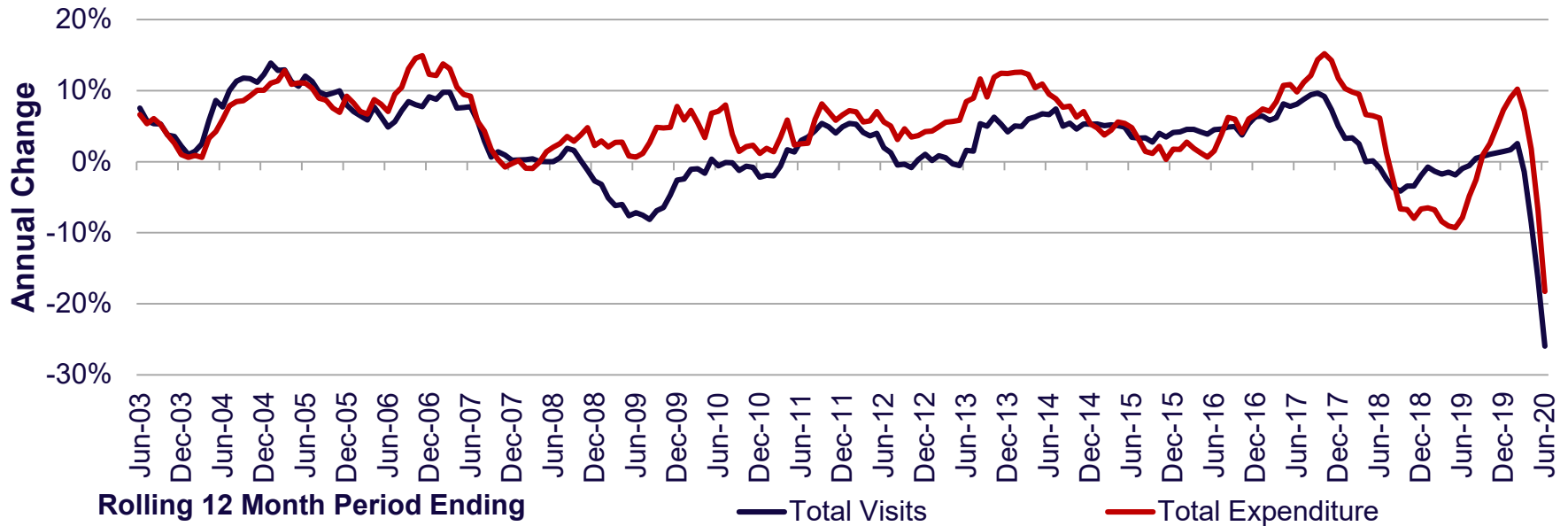


Source: Bank of England



# Longer term trends

Visits and spend since 2003

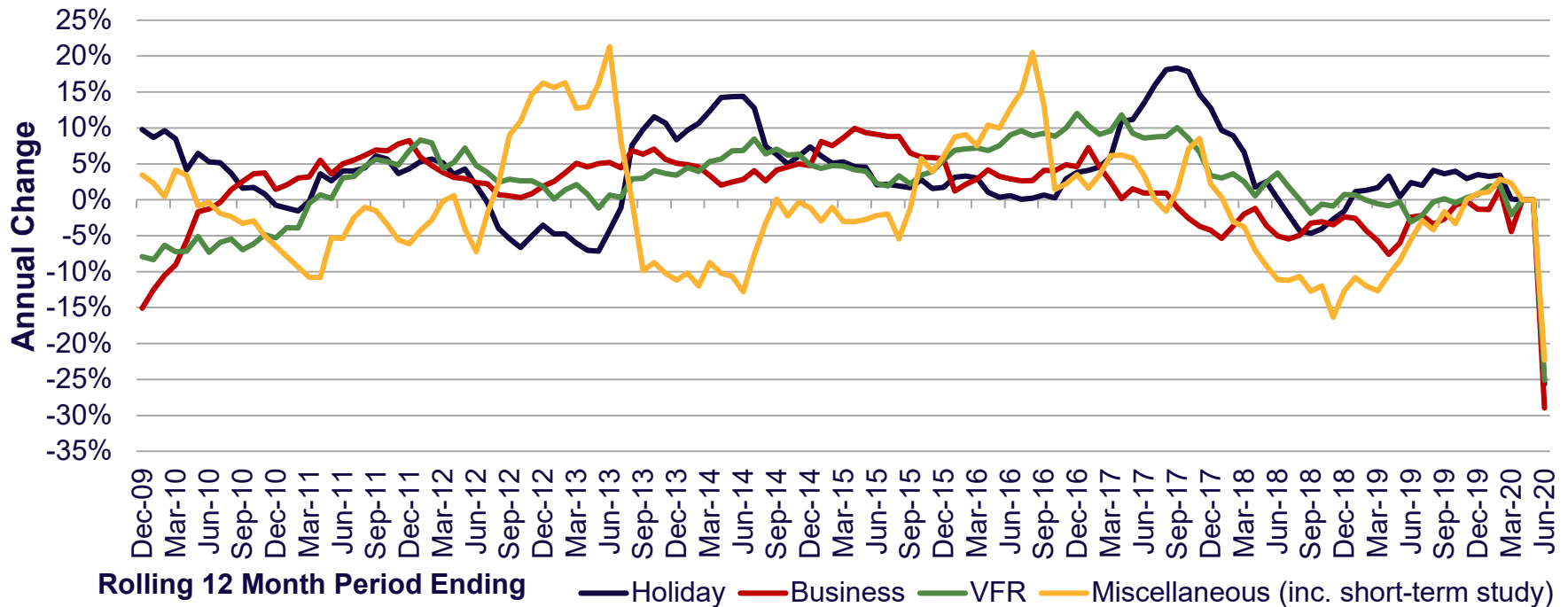


This chart shows the year-on-year change in headline IPS results based on a 'rolling twelve-month' basis. Presenting the data in this way enables us to spot emerging trends and helps to 'smooth out' erratic results for any single month.

The impact of the global economic crisis can be seen in 2009 followed by slow but reasonably steady recovery until late 2017. In 2018, however, there was a decline in visits and spend that continued into the first months of 2019. We started observing a more positive trend in the last months of 2019, but from March 2020 we can see a rapid and unparalleled decline due to the outbreak of COVID-19.

# Longer term trends

Trends in inbound tourism by purpose since 2009



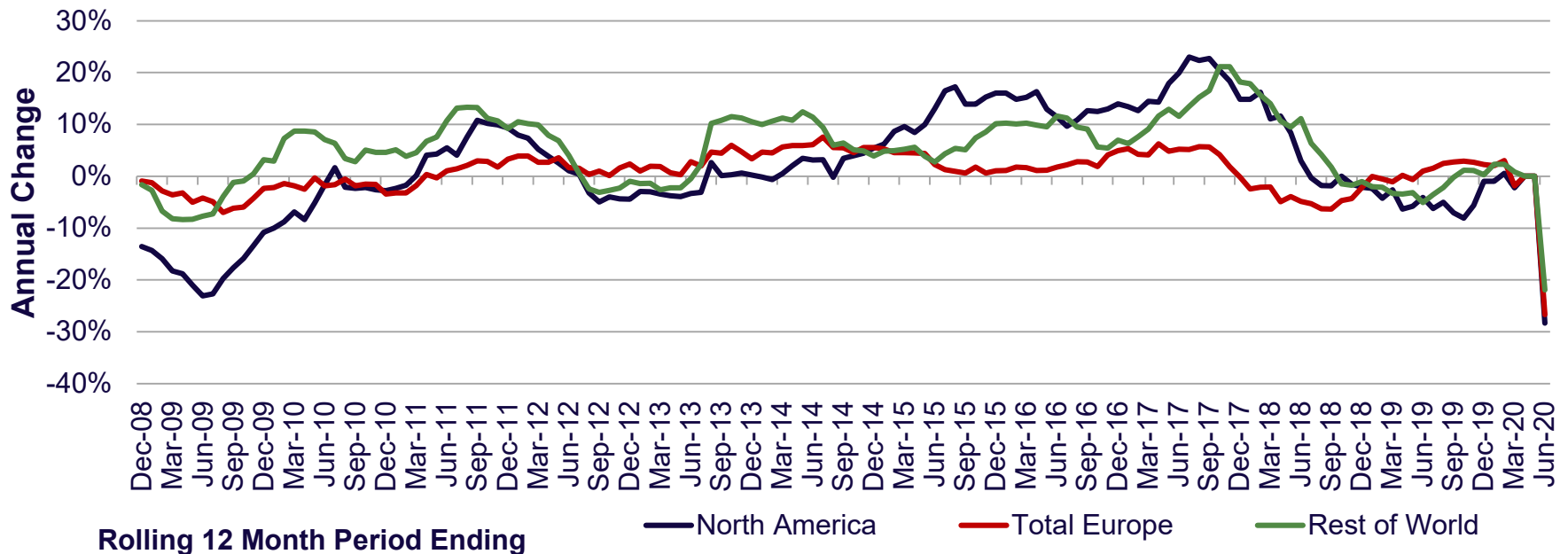
All journey purposes have been impacted to relatively the same amounts due to COVID and the recovery by journey purpose will be of interest in the coming few years.

Prior to March 2020, holiday visits were far more resilient to the recession in the late 2000s and mostly have shown long term growth with some variability in recent years. After a significant downturn in 2009, business visits had generally seen steady growth since, which intensified in 2015 and gradual recovery in 2019. Trips to visit friends and relatives have largely shown growth in recent years, and stayed in positive territory since mid-2013 until a decline in 2018. Trips for other (miscellaneous) purposes account for a smaller number of visits and show the most variation with a downward trend since early 2018, but gradual recovery until the recent crises.

[More data on long term trend are available here](#)

# Longer term trends

Trends in inbound tourism by origin region since 2008



This chart shows the longer term picture and the varying rates of recovery in visit numbers after the global financial crisis and immediate impact of COVID-19.

Until 2017, visits from Total Europe grew at a steady pace; they fell in 2018 but had been stabilising prior to March 2020. Visits from North America initially struggled to recover since 2009 but showed steady growth between 2014 and 2017. There had been some signs weakness since 2019 before the fall this year.

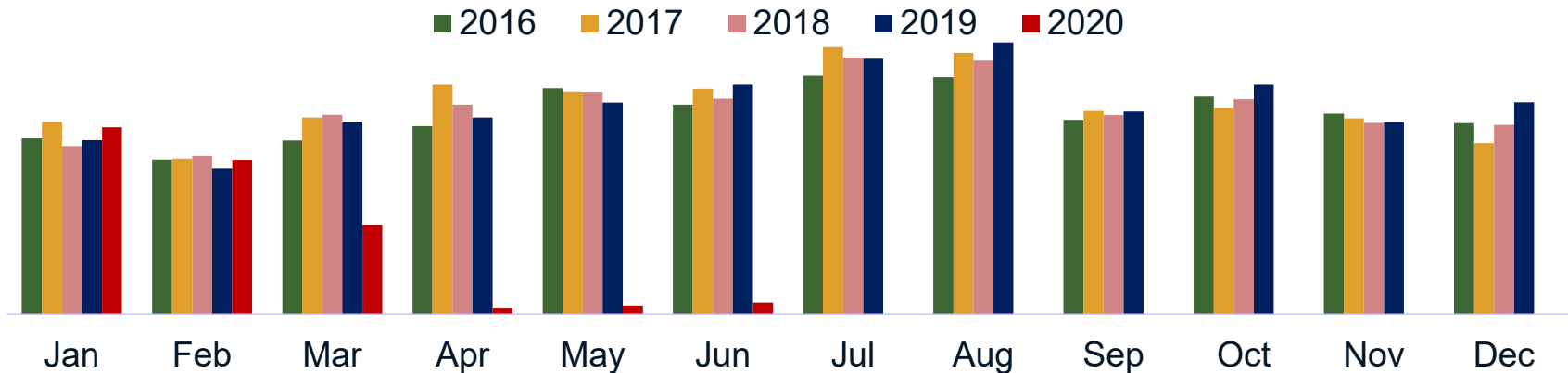
Visits from the 'Rest of World' region remained broadly in positive territory until late 2016, when they started fluctuating more. Late 2017 showed strong growth, with a decline in 2018 and early 2019 before returning to growth prior to March 2020.

# Detailed monthly trends

## Visits

### Overseas Visits to the UK - Total Visits (000)

Source: Office for National Statistics, International Passenger Survey



| Years | Jan   | Feb   | Mar   | Apr   | May   | Jun   | Jul   | Aug   | Sep   | Oct   | Nov   | Dec   |
|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 2016  | 2,857 | 2,514 | 2,827 | 3,059 | 3,672 | 3,406 | 3,877 | 3,854 | 3,161 | 3,535 | 3,258 | 3,107 |
| 2017  | 3,123 | 2,528 | 3,196 | 3,731 | 3,619 | 3,662 | 4,344 | 4,253 | 3,302 | 3,359 | 3,183 | 2,780 |
| 2018  | 2,734 | 2,573 | 3,240 | 3,404 | 3,614 | 3,503 | 4,172 | 4,126 | 3,237 | 3,491 | 3,112 | 3,075 |
| 2019  | 2,830 | 2,372 | 3,129 | 3,199 | 3,438 | 3,727 | 4,155 | 4,418 | 3,292 | 3,731 | 3,121 | 3,445 |
| 2020  | 3,036 | 2,512 | 1,446 | 95    | 127   | 176   |       |       |       |       |       |       |

**Note:** Visits in thousands. Monthly data is replaced by the more accurate Quarterly data. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

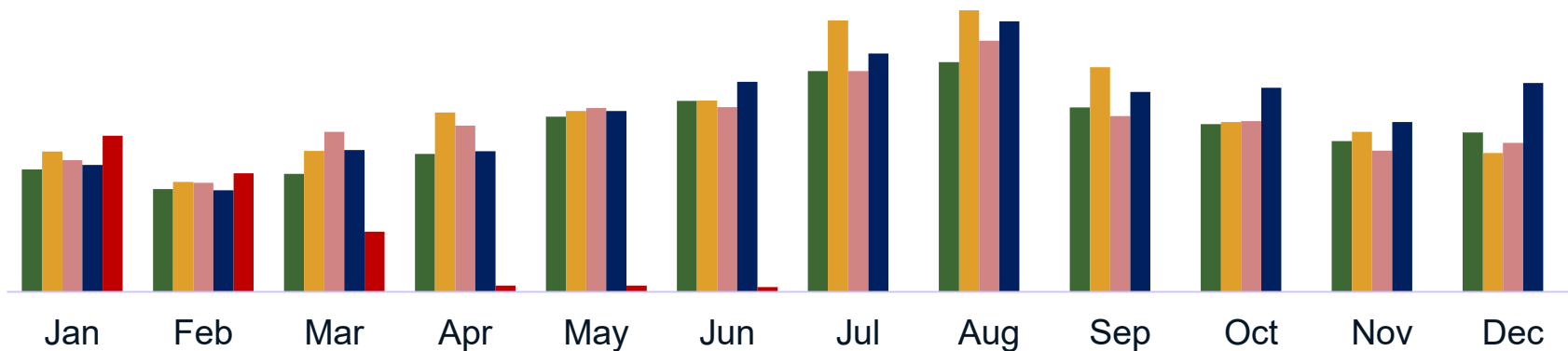
# Detailed monthly trends

## Spend

### Overseas Visits to the UK - Total Spend (£m)

Source: Office for National Statistics, International Passenger Survey

■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020



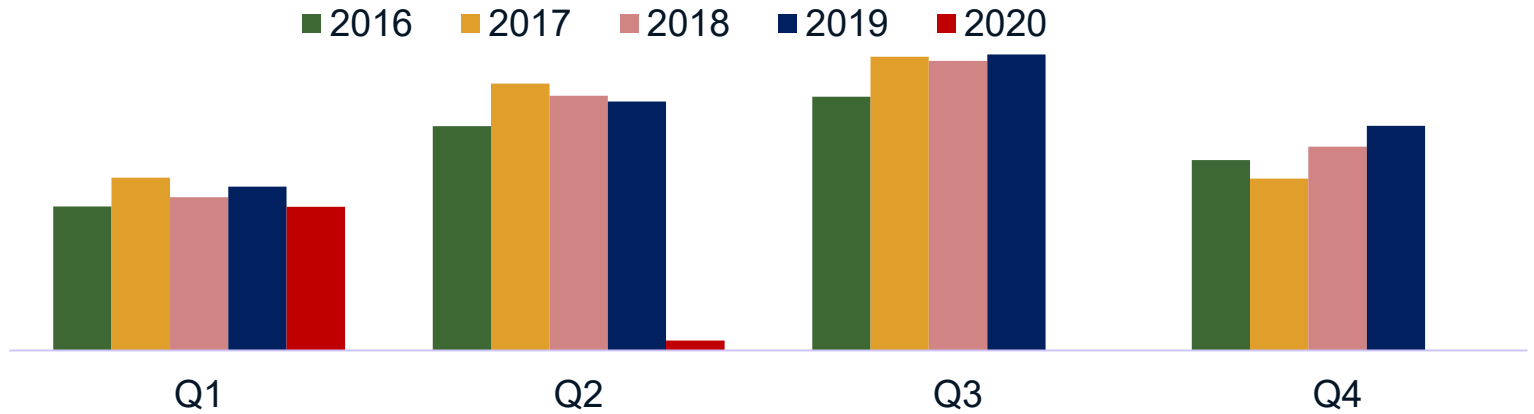
| Years | Jan   | Feb   | Mar   | Apr   | May   | Jun   | Jul   | Aug   | Sep   | Oct   | Nov   | Dec   |
|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 2016  | 1,586 | 1,332 | 1,529 | 1,787 | 2,270 | 2,476 | 2,864 | 2,981 | 2,390 | 2,176 | 1,956 | 2,067 |
| 2017  | 1,820 | 1,426 | 1,829 | 2,325 | 2,346 | 2,482 | 3,521 | 3,654 | 2,913 | 2,204 | 2,076 | 1,800 |
| 2018  | 1,708 | 1,412 | 2,074 | 2,157 | 2,385 | 2,396 | 2,864 | 3,259 | 2,278 | 2,212 | 1,830 | 1,931 |
| 2019  | 1,646 | 1,318 | 1,840 | 1,824 | 2,347 | 2,725 | 3,090 | 3,510 | 2,593 | 2,645 | 2,201 | 2,708 |
| 2020  | 2,026 | 1,538 | 780   | 79    | 79    | 60    |       |       |       |       |       |       |

**Note:** Spending in million pounds. Monthly data is replaced by the more accurate Quarterly data. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trends

Journey Purpose (1 of 4) – Holiday

**Overseas Visits to the UK – Holiday Visits (000)**  
**Source: Office for National Statistics, International Passenger Survey**



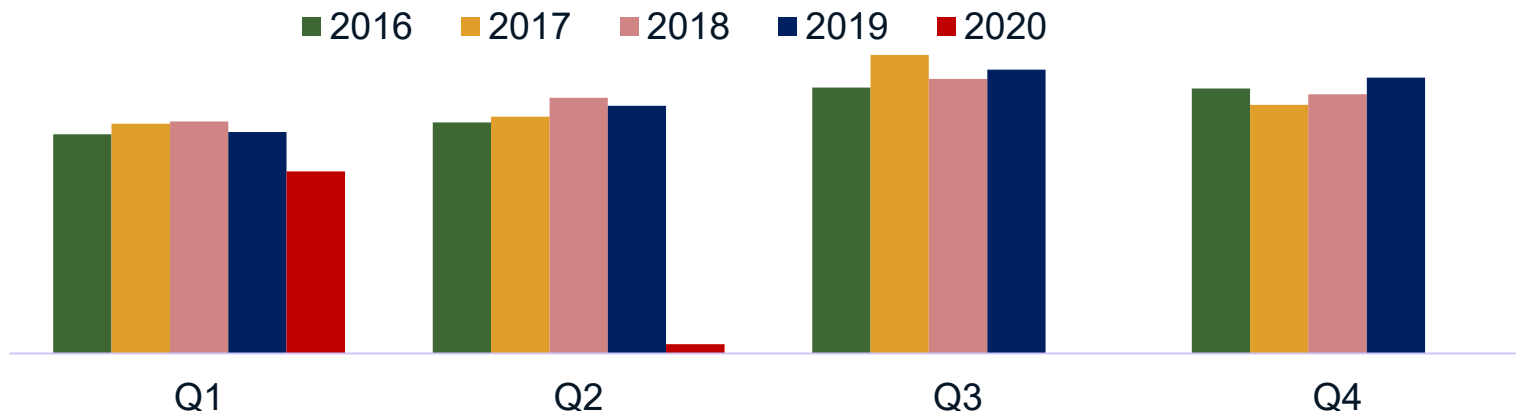
| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|-------|--------------|--------------|--------------|--------------|
| 2016  | 2,610        | 4,061        | 4,598        | 3,448        |
| 2017  | 3,128        | 4,832        | 5,324        | 3,113        |
| 2018  | 2,778        | 4,614        | 5,249        | 3,694        |
| 2019  | 2,964        | 4,508        | 5,365        | 4,068        |
| 2020  | 2,600        | 177          |              |              |

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trends

## Journey Purpose (2 of 4) – VFR

**Overseas Visits to the UK – Visits to Friends and Relatives (000)**  
**Source: Office for National Statistics, International Passenger Survey**



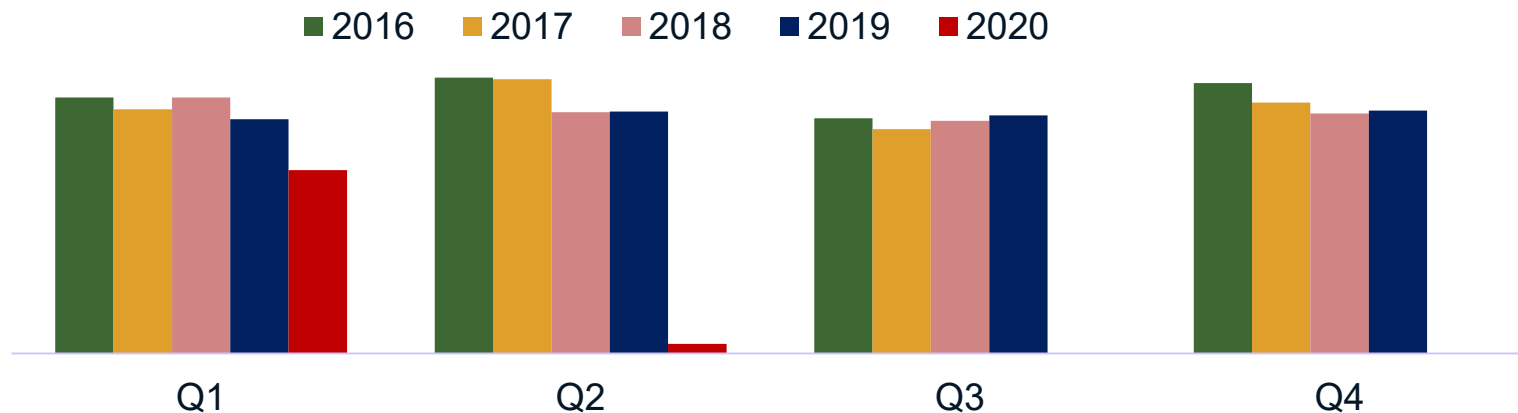
| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|-------|--------------|--------------|--------------|--------------|
| 2016  | 2,647        | 2,789        | 3,210        | 3,199        |
| 2017  | 2,776        | 2,861        | 3,607        | 3,002        |
| 2018  | 2,803        | 3,086        | 3,315        | 3,130        |
| 2019  | 2,672        | 2,993        | 3,430        | 3,332        |
| 2020  | 2,197        | 112          |              |              |

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trends

Journey Purpose (3 of 4) – Business

**Overseas Visits to the UK – Business Visits (000)**  
**Source: Office for National Statistics, International Passenger Survey**



| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|-------|--------------|--------------|--------------|--------------|
| 2016  | 2,319        | 2,499        | 2,130        | 2,449        |
| 2017  | 2,211        | 2,484        | 2,033        | 2,271        |
| 2018  | 2,319        | 2,185        | 2,106        | 2,175        |
| 2019  | 2,123        | 2,190        | 2,157        | 2,201        |
| 2020  | 1,661        | 85           |              |              |

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)



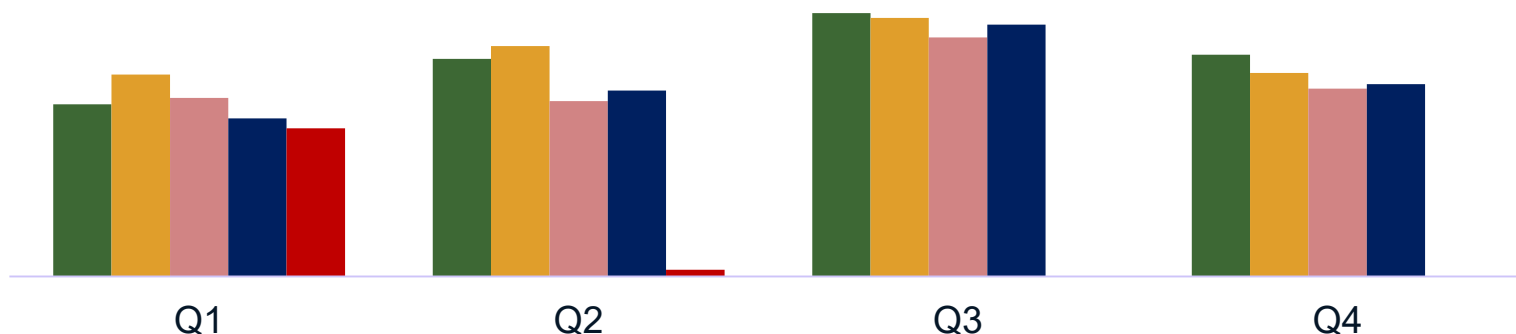
# Detailed quarterly trends

## Journey Purpose (4 of 4) – Miscellaneous

Overseas Visits to the UK – Miscellaneous (includes short-term study, 000)

Source: Office for National Statistics, International Passenger Survey

■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020

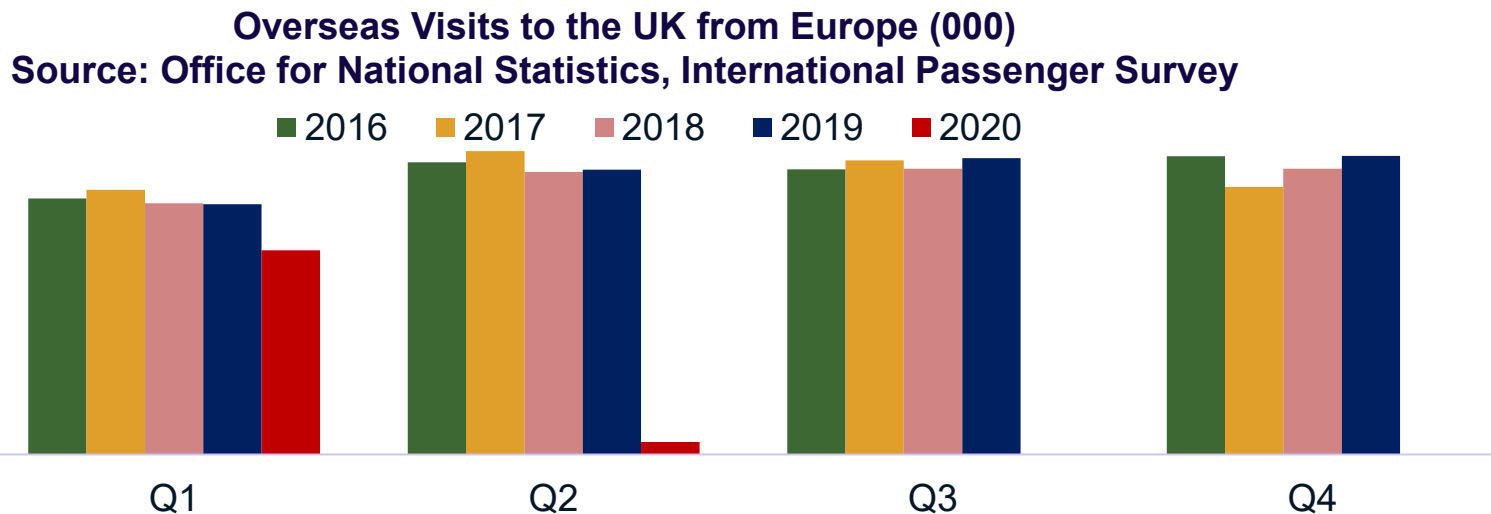


| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|-------|--------------|--------------|--------------|--------------|
| 2016  | 624          | 789          | 954          | 804          |
| 2017  | 732          | 835          | 936          | 737          |
| 2018  | 647          | 636          | 866          | 680          |
| 2019  | 573          | 673          | 912          | 697          |
| 2020  | 537          | 24           |              |              |

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trends

Global Regions (1 of 3) – Europe



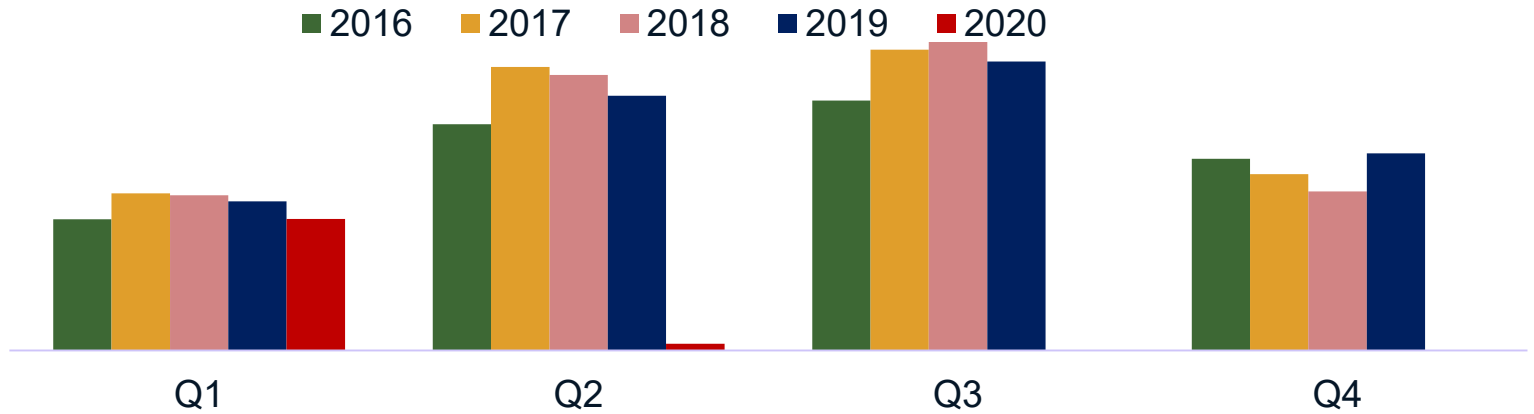
| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|-------|--------------|--------------|--------------|--------------|
| 2016  | 6,184        | 7,053        | 6,884        | 7,202        |
| 2017  | 6,391        | 7,331        | 7,102        | 6,464        |
| 2018  | 6,065        | 6,824        | 6,904        | 6,899        |
| 2019  | 6,044        | 6,879        | 7,156        | 7,215        |
| 2020  | 4,926        | 298          |              |              |

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trends

Global Regions (2 of 3) – North America

**Overseas Visits to the UK from North America (000)**  
**Source: Office for National Statistics, International Passenger Survey**



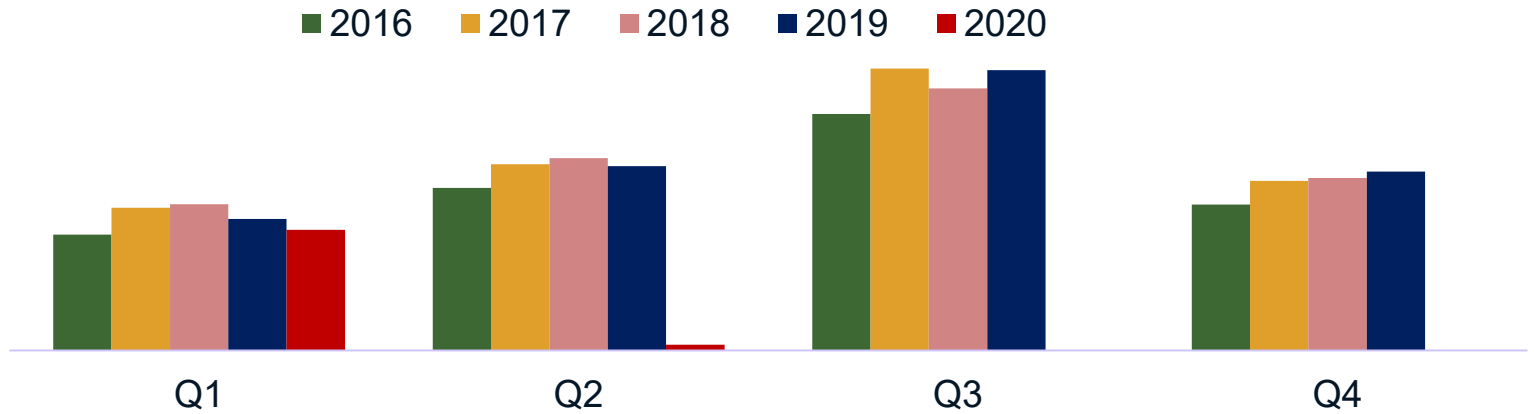
| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|-------|--------------|--------------|--------------|--------------|
| 2016  | 792          | 1,366        | 1,509        | 1,157        |
| 2017  | 948          | 1,712        | 1,817        | 1,065        |
| 2018  | 938          | 1,663        | 1,864        | 959          |
| 2019  | 900          | 1,537        | 1,745        | 1,191        |
| 2020  | 794          | 40           |              |              |

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed monthly trends

Global Regions (3 of 3) – Rest of the World

**Overseas Visits to the UK from Rest of the World (000)**  
**Source: Office for National Statistics, International Passenger Survey**



| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|-------|--------------|--------------|--------------|--------------|
| 2016  | 1,223        | 1,718        | 2,499        | 1,540        |
| 2017  | 1,508        | 1,969        | 2,980        | 1,793        |
| 2018  | 1,544        | 2,033        | 2,769        | 1,821        |
| 2019  | 1,388        | 1,948        | 2,963        | 1,891        |
| 2020  | 1,274        | 60           |              |              |

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Definitions

**Total Europe** includes **EU15** (Austria, Belgium, Denmark, France, Finland, Germany, Greece, Irish Republic, Italy, Luxembourg, Netherlands, Portugal, Spain and Sweden); **Other EU** (Bulgaria, Cyprus (South), Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia. Note that Croatia has been included in the 'Other EU' category since it joined in July 2013; before July 2013 this group was labelled as A12) and **Rest of Europe** (European countries outside the EU (including Russia, Norway and Switzerland). Before July 2013 Croatia was also included here, but from July 2013 appears in Other EU)

**North America** - Canada (including Greenland and St Pierre et Miquelon), USA (including Puerto Rico and US Virgin Islands)

**Rest of World** – Countries outside Europe and North America (Africa, Asia, Central America, Middle East, Oceania, South America)

**VFR** - Visiting Friends and Relatives

**Miscellaneous visits** - includes those for short term study, to attend sports events, for personal shopping, health or religious purposes, accompanying others and many more

**Visit** - all departing visits from overseas residents (including those who may be UK nationals but live elsewhere, excluding other nationals who have been in the UK for 12 months or longer)

**Spend** - the amount visitors report spending in the UK during their stay

**YoY** - Year on Year

## More information

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

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

Make sure you get all the latest figures and reports by signing-up for VisitBritain's e-newsletter