VisitBritain

Inbound Tourism Trends Quarterly
Quarter 2 2018

Issue 25

November 2018

Contents

About this data

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

The next Quarterly Release (July – September 2018) is scheduled for January 2019. This will provide data on visits by markets and UK region visited up to Q3 2018.

The Annual Release for 2017, which contained some revisions to the quarterly data from 2017, was on the 20th July 2018.

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 month.

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, international overnight tourism arrivals were up by an estimated 7.0% in 2017. In the first half of 2018*, arrivals were up 6.1%.

In 2018, as in 2017, Europe has seen slightly stronger growth than the global average, with visits up 6.8%. Within this, Western Europe was up 7%, Southern Europe 9%, Northern Europe (which includes UK) 1% and Eastern Europe 7%.

Globally, the fastest growth in visits this year so far has been in Asia Pacific, where arrivals are up 7.4%. Visits to the Americas were up by the weakest rate, 3.3%.

Continents	International tourist arrivals to region 2017 (millions)	% growth in 2017	% growth in first half of 2018 (estimated)
World	**1,326**	**7.0%**	**6.1%**
Europe	**672**	**8.4%**	**6.8%**
Asia Pacific	**323**	**5.6%**	**7.4%**
Americas	**211**	**4.8%**	**3.3%**
Africa	**63**	**8.6%**	**4.0%**
Middle East	**58**	**4.6%**	**4.6%**

Source: UNWTO

*2018 figures are provisional and will be revised with subsequent data.

Economic outlook

- After growing at its fastest rate since the financial crisis in 2017, the Eurozone economy has softened slightly this year, indicating that the cyclical high point in the recovery has now passed. Nonetheless, consumer and business confidence remain high and unemployment continues to fall.
- However, in several Eurozone countries consumer spending growth prospects for 2019 are a little higher than in 2018, including France and Germany.
- US: the economy should remain healthy this year, despite stock market wobbles, aided by strong confidence and fiscal stimulus. Growth is forecast to tick downwards in 2019.
- China's economy continues to slow gradually, though consumer spending is still forecast to grow by well over 6%. Risks to this central outlook include the US-China trade war as well as high debt levels.
- The oil price has eased back from a four year high of $86/barrel* to around $71 at time of writing.

Consumer spending growth	2018	2019	2020
Australia	2.9%	2.3%	2.6%
Canada	2.2%	1.8%	1.7%
Denmark	2.8%	3.0%	2.7%
France	0.8%	1.2%	1.3%
Germany	1.5%	2.0%	1.9%
Ireland	2.0%	2.6%	2.8%
Italy	0.9%	0.9%	1.0%
Japan	0.7%	1.3%	-0.4%
Netherlands	2.4%	1.4%	1.4%
Norway	2.3%	2.2%	2.0%
Poland	4.4%	3.6%	3.2%
Spain	2.3%	1.9%	1.6%
Sweden	2.5%	2.0%	2.4%
Switzerland	1.6%	1.6%	1.6%
UK	1.1%	0.9%	1.7%
USA	2.5%	2.3%	1.8%
Brazil	1.5%	2.1%	3.3%
China	6.9%	6.6%	6.5%
India	7.5%	7.3%	7.4%
Russia	3.1%	2.7%	2.3%
Saudi Arabia	3.0%	2.5%	2.5%
South Africa	1.6%	1.7%	3.1%

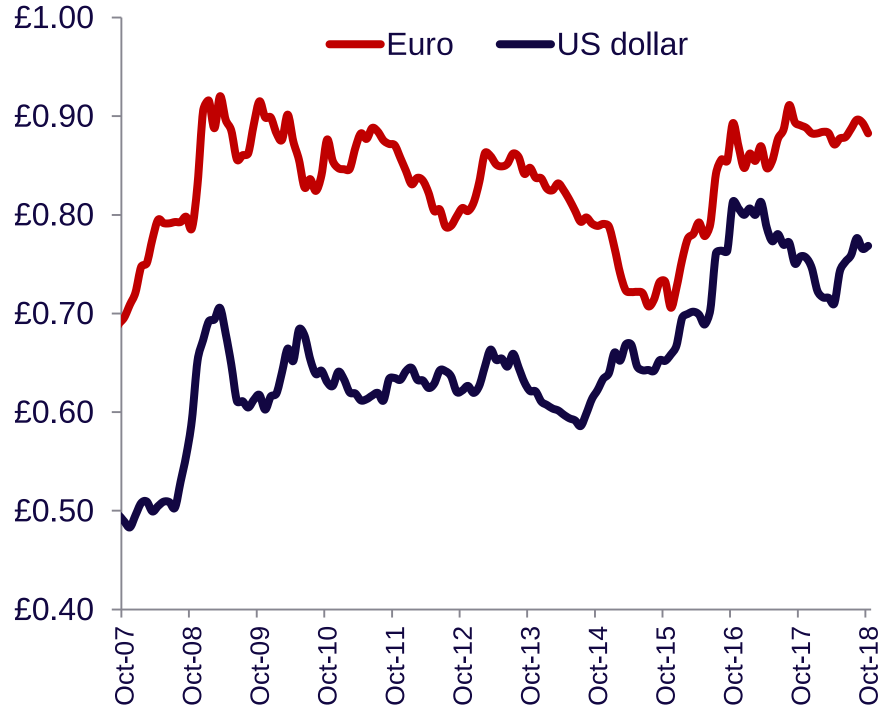
Source: Oxford Economics

*Price as of 12th November 2018

Exchange rate

- Post the EU referendum, the pound fell sharply. It has fluctuated since then but as of October 2018 was very similar to its value one year before overall. The pound remains historically low against the US dollar in particular although is up from its lowest point in 2017.
- As of October 2018, the pound was up by 1% against the euro and down 1% against the US dollar compared to a year before. It was 8% up against the Australian dollar, 2% up against the Canadian dollar and up 3% against the Chinese Yuan.
- It was up by much greater margins against several emerging market currencies – including those of Turkey, Brazil, and Argentina, making the pound more expensive for visitors from these markets.

Value of US dollar and euro against pound.
Monthly averages to December 2017



Source: Bank of England

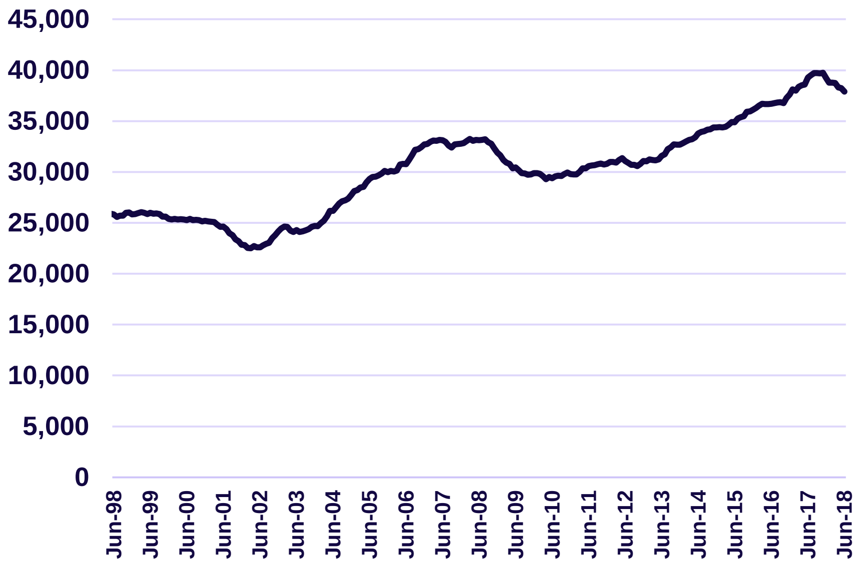
Visits and value trends by journey purpose, transport mode and area visited

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

- There were **10.0 million visits** to the UK in Q2 2018 – this was down 8% compared to Q2 2017 although still the second highest Q2 ever recorded (Q2 2017 is the highest).
- The figures for the year to date (January to June) are 7% down on the same period of 2017.
- In the rolling 12 months to June 2018, there were 37.9 million inbound visits, just 3% down on the previous 12 month period.
- The latest provisional data for June, our latest monthly results, show visits down 9% compared to June 2017.

Inbound visits (000s), rolling year ending



	Visits (000s)	Growth
Q2 2018*	10,038	-8%
Year to date* (January – June 2018)	17,874	-7%
Latest monthly* (June 2018)	3,234	-9%
Rolling 12 months* (Jul 2017 – Jun 2018)	37,904	-3%
Latest full year (2017)	39,214	4%

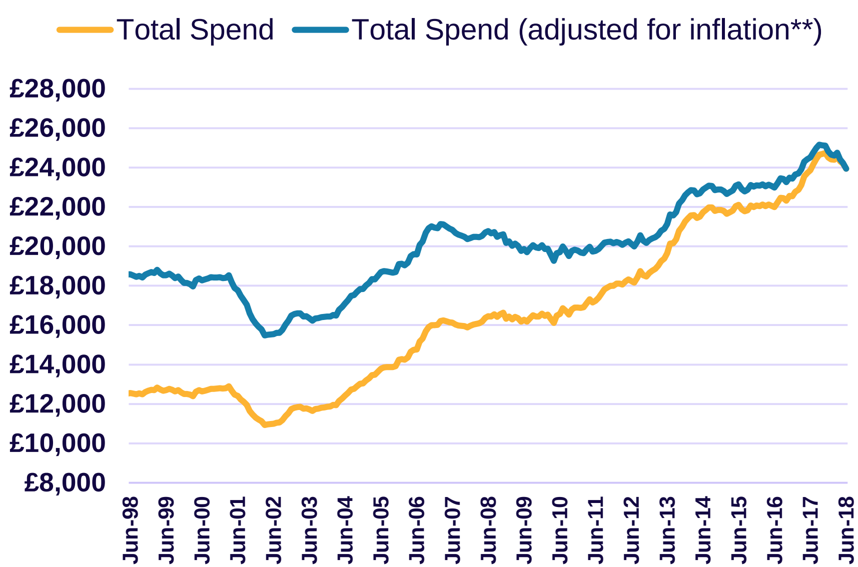
Source: International Passenger Survey

*2018 figures are provisional and will be revised with the next quarterly and annual releases

Inbound value

- Inbound visitor spending was also down in Q2 2018 compared to the record holding Q2 2017. Visitors **spent £5.8 billion** in the UK during Q2 2018, down 10%.
- So far in 2018 spend is tracking 5% lower, compared to the first half of 2017 at £10.3 billion.
- Inbound visitor spending in the 12 months to June 2018 has reached £23.9 billion, on par with the previous 12 month period.
- The latest provisional data for June, our latest monthly results, show spend down 11% compared to June 2017.

Inbound spend (£m), rolling year ending



	Spend (£m) Nominal terms	Growth
Q2 2018*	£5,839	-10%
Year to date* (January – June 2018)	£10,289	-5%
Latest monthly* (June 2018)	£2,008	-11%
Rolling 12 months* (Jul 2017 – Jun 2018)	£23,943	0%
Latest full year (2017)	£24,507	9%

Source: International Passenger Survey

*2018 figures are provisional and will be revised with the next quarterly and annual releases; **Adjusted for inflation based on June 2018 price level

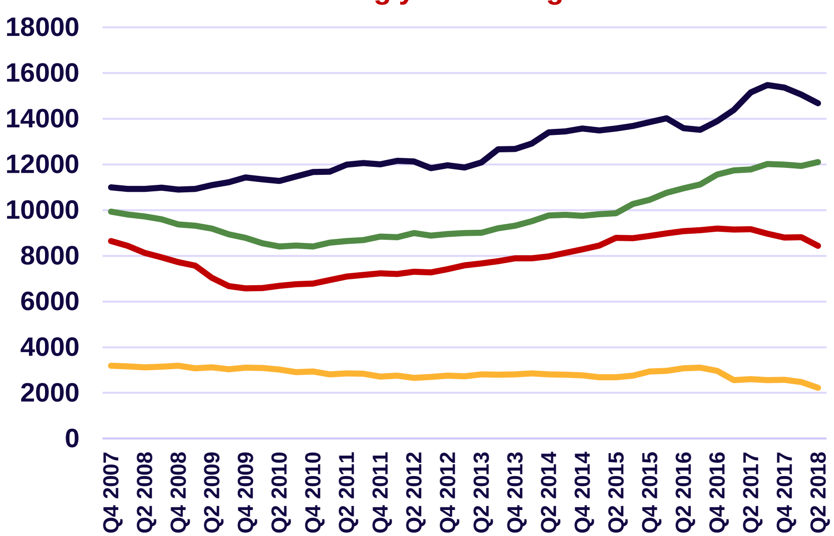
Journey purpose trends

Holiday visits and spend both fell from Q2 2017’s records in Q2 this year. Visits fell 8% to 4.3 million; spend fell by a milder 4% to £2.8 billion. Strong 2017 results put visits down 3%, but spend up 6% in the rolling 12 months to June 2018 – compared to the previous 12 months.

Journeys to **visit friends or relatives (VFR)** rose by 6% to 3.0 million - the first time the UK has welcomed 3 million VFR visits in any Q2 period. VFR spending fell 4% from Q2 2017’s record to £1.3 billion. VFR is the only journey purpose that reported a rise in both visits and spend in the 12 months to June 2018 – compared to the rolling 12 months to June 2017.

Compared to a record setting Q2 2017 **business** visits fell 15% to 2.1 million and spending was down 30% to £1.1 billion in Q2 2018.

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



% change in visits
Jul 17 – Jun 18 v Jul 16 – Jul 17

Holiday	Business	VFR	Misc.
-3%	-8%	3%	-15%

% change in spend
Jul 17 – Jun 18 v Jul 16 – Jul 17

Holiday	Business	VFR	Misc.
6%	-12%	11%	-14%

	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Holiday	6,828	£4,377	14,675	£10,448
Business	4,288	£2,286	8,442	£4,942
VFR	5,626	£2,569	12,102	£5,928
Misc.	1,132	£1,039	2,685	£2,586

Source: International Passenger Survey
*2018 figures are provisional and will be revised with the next quarterly and annual releases

Transport mode

Travel via **air** accounts for the majority of inbound visits to the UK. Visits by this main mode fell 6% in Q2 2018, compared to 2017. Spending by those travelling by air was down by a larger 12% in Q2 2018 to £4.9 billion. Over the longer term rolling 12 months to June 2018 visits fell 2%, but spending remained on par with the previous 12 month period.

Visits to the UK via the **tunnel** dipped 24% in Q2 2018 to 1 million. Spending also declined, by 8%, to £441 million. In the 12 months to June 2018, tunnel visits were down 11% but spend was up 1% on the previous 12 months.

Visits to the UK departing via the **sea** were down 3% in Q2 2018 compared to Q2 2017. However spending was up 12%. Similar patterns can been seen in the rolling 12 months to June 2018.

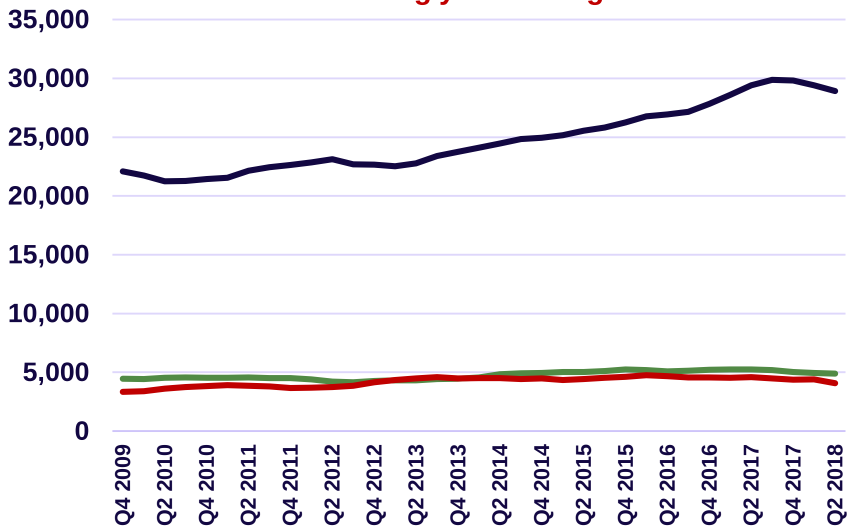
% change in visits
Jul 17 – Jun 18 v Jul 16 – Jul 17

	Air	Tunnel	Sea
% change in visits	-2%	-11%	-7%

% change in spend
Jul 17 – Jun 18 v Jul 16 – Jul 17

	Air	Tunnel	Sea
% change in spend	0%	1%	5%

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



	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Air	13,531	£8,878	28,933	£20,761
Tunnel	2,061	£770	4,077	£1,632
Sea	2,282	£641	4,894	£1,551

Source: International Passenger Survey
*2018 figures are provisional and will be revised with the next quarterly and annual releases

Area visited

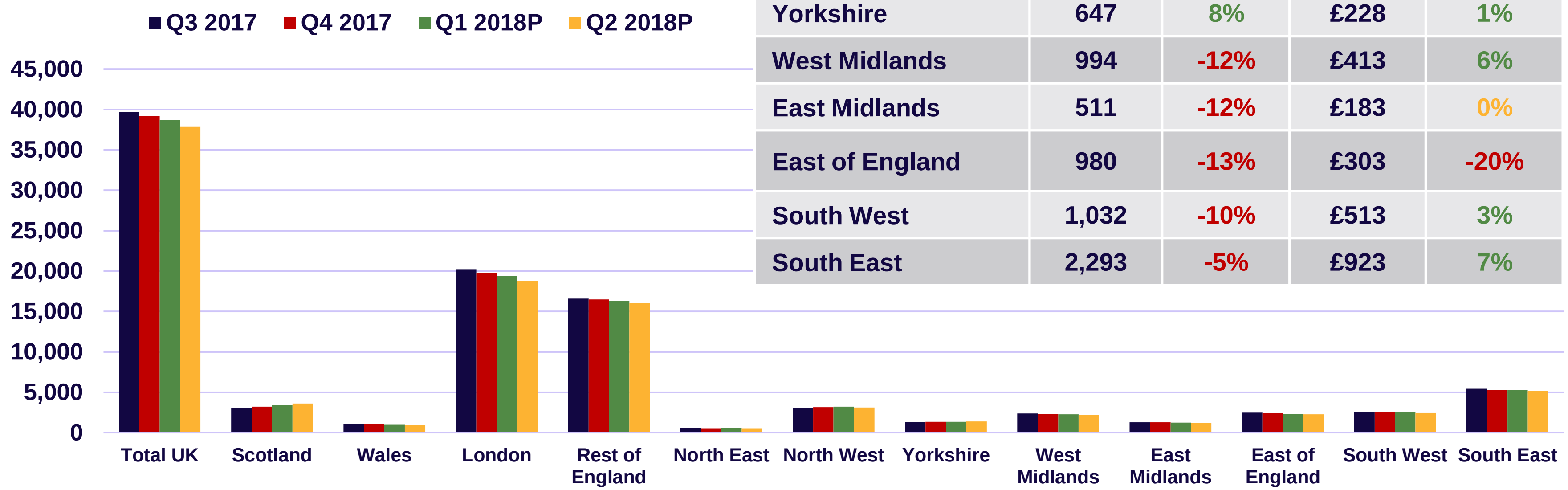
Overall there was stronger spending growth amongst the nations and regions, compared to visits – though there are a number of negative results.

There was growth to **Scotland** and **Yorkshire** – both setting new first six month visit records. All other regions have reported a decline in visits numbers, compared to the first half of 2017.

While six nations and regions reported growth in visitor spending in the first six months of 2018, compared to the start of 2017, there were four nations and regions that reported both a decline in spend and visits.

Year to date (Jan – Jun 18*)	Visits (000s)	Growth	Spend (£ mill)	Growth
Total UK	17,874	-7%	£10,289	-5%
Scotland	1,692	30%	£967	0%
Wales	430	-13%	£167	5%
London	8,968	-10%	£5,642	-8%
Rest of England	7,276	-6%	£3,289	-1%
North East	209	-9%	£126	16%
North West	1,468	-1%	£594	-13%
Yorkshire	647	8%	£228	1%
West Midlands	994	-12%	£413	6%
East Midlands	511	-12%	£183	0%
East of England	980	-13%	£303	-20%
South West	1,032	-10%	£513	3%
South East	2,293	-5%	£923	7%

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



Source: International Passenger Survey

*2018 figures are provisional and will be revised with the next quarterly and annual releases

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

Country of residence	Visits (000)				Spend (£m)			
	Q2 2017	Q2 2018*	Growth	New record	Q2 2017	Q2 2018*	Growth	New record
Australia	280	277	-1%		£317	£345	9%	yes
Belgium	290	308	6%		£116	£118	2%	yes
Brazil**	84	52	-37%		£98	£45	-55%	
Canada	244	237	-3%		£182	£187	3%	
China	60	69	14%	yes	£139	£112	-20%	
Denmark	163	236	45%	yes	£72	£102	41%	
Finland**	67	68	1%		£35	£31	-12%	
France	1,156	987	-15%		£387	£367	-5%	
Germany	1,019	1,011	-1%		£514	£422	-18%	
Hong Kong**	66	44	-33%		£93	£50	-47%	
India	211	152	-28%		£134	£106	-21%	
Irish Republic	770	666	-14%		£224	£216	-4%	
Italy	487	421	-14%		£200	£168	-16%	
Japan**	41	48	19%		£39	£101	156%	
Netherlands	644	542	-16%		£229	£199	-13%	
Norway	170	187	10%		£93	£118	26%	
Poland	444	495	12%	yes	£101	£100	-1%	
Portugal**	160	144	-10%		£65	£56	-14%	
Romania	263	221	-16%		£74	£98	34%	
Spain	599	579	-3%		£310	£255	-18%	
Sweden	249	222	-11%		£139	£135	-3%	
Switzerland	315	218	-31%		£186	£108	-42%	
United Arab Emirates	69	78	13%	yes	£108	£102	-6%	
USA	1,277	1,127	-12%		£1,176	£1,006	-14%	

*2018 figures are provisional and will be revised with the next quarterly and annual releases

**sample size below 100

North West Europe

North West Europe provides some of our highest levels of visits to the UK. Visits and spend to the UK from **Belgium** were up 6% and 2% respectively in Q2 2018 compared to Q2 2017.

There were 987,000 visits from **France** to the UK, 15% fewer than in Q2 2017. Spending was also down in Q2 this year (-5%) to £367 million. This is the second consecutive quarter of 2018 where year on year quarterly spend and visits have fallen.

Irish Republic visits decreased in Q2 2018, down 14% to 666,000 – the fourth consecutive quarter of year on year visit declines. Visitor spending from the Irish Republic fell in Q2 2018, down 4% compared to Q2 2017, at £216 million.

Visits were down 16% and spend was down 13% from the **Netherlands** in Q2 2018, but both measures were up in Q2 2017 compared to Q2 2016.

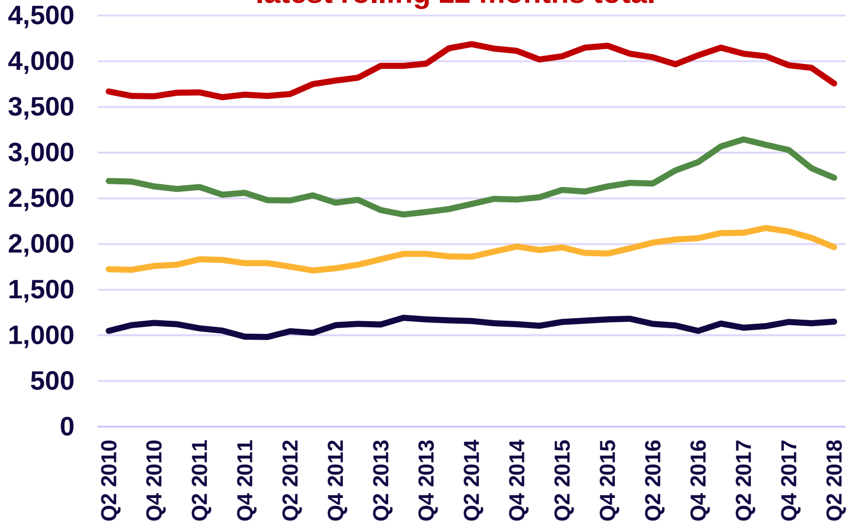
% change in visits
Jul 17-Jun 18 v Jul 16- Jun 17

Belgium	France	Irish Rep	Netherlands
6%	-8%	-13%	-7%

% change in spend
Jul 17-Jun 18 v Jul 16- Jun 17

Belgium	France	Irish Rep	Netherlands
20%	-2%	-14%	-4%

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



	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Belgium	573	£213	1,151	£412
France	1,947	£681	3,757	£1,399
Irish Republic	1,252	£434	2,726	£909
Netherlands	901	£323	1,966	£708

Source: International Passenger Survey
*2018 figures are provisional and will be revised with the next quarterly and annual releases

Central Europe

Visits from **Austria** were up 6% in Q2 2018 (compared to Q2 2017) – not quite enough to claim a new record. Spending fell 24% compared to Q2 2017. The start of 2018 has seen visits up 2% and send down 22% against the start of 2017.

Visits from **Germany** were down marginally by 1% to a little over 1 million in Q2. Spending decreased 18% to £422 million in Q2, but this is compared to the record set in Q2 2017. Inbound visitor spending has posted a new quarterly record in four out of the last five quarters – Q2 2017 to Q1 2018.

Visits and spend from **Switzerland** decreased in Q2 2018, down 31% and 42% respectively. Compared to the record first six months of 2017, visits are down 29% between January to June 2018.

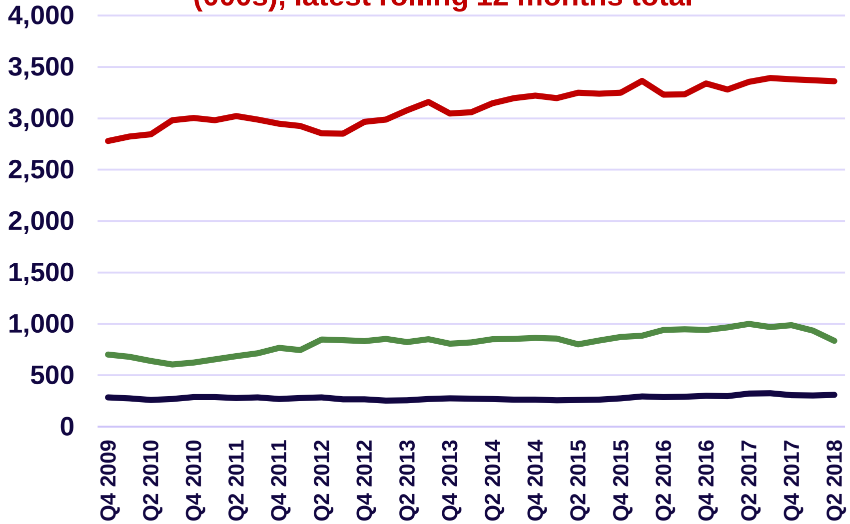
% change in visits
Jul 17-Jun 18 v Jul 16- Jun 17

Austria	Germany	Switzerland
-4%	0%	-17%

% change in spend
Jul 17-Jun 18 v Jul 16- Jun 17

Austria	Germany	Switzerland
-20%	2%	-39%

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



	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Austria	149	£70	310	£165
Germany	1,542	£682	3,362	£1,554
Switzerland	370	£199	837	£502

Source: International Passenger Survey

*2018 figures are provisional and will be revised with the next quarterly and annual releases

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Southern Europe

Visits from **Greece** rose in Q2 2018, but spend fell. However over the first six months and the longer term, rolling 12 months both visits and spend are lower than the previous periods.

Visits and spend from **Italy** were both down in Q2 2018, but with a strong Q1, first half year results are marginally higher than the first half of 2017.

Both visits and spend from **Portugal** and **Spain** were down in both Q1 and Q2 2018, compared to the start of 2017. In the rolling 12 months to June 2018 visits are down 11% and 8% respectively (both compared the record setting rolling 12 months to June 2017). The decline in spending has been milder, down 2% from Portugal and 7% in Spain in the rolling 12 months to June 2018.

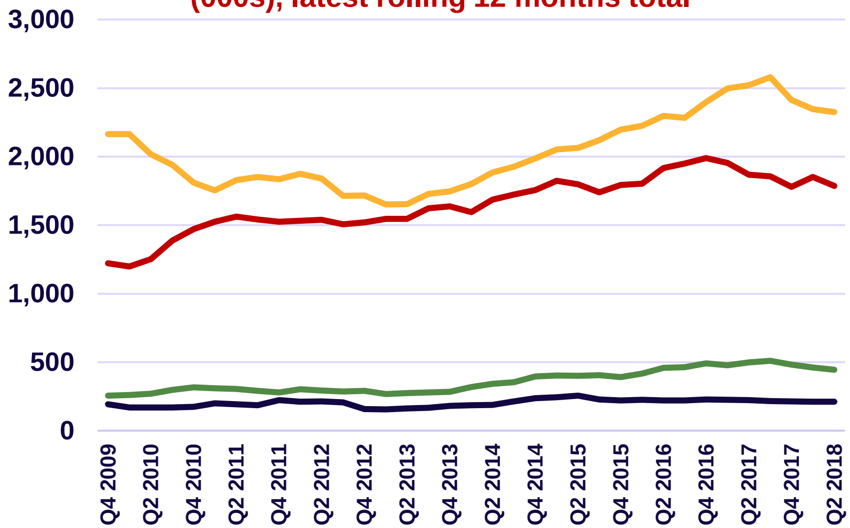
% change in visits
Jul 17-Jun 18 v Jul 16- Jun 17

Greece	Italy	Portugal	Spain
-5%	-4%	-11%	-8%

% change in spend
Jul 17-Jun 18 v Jul 16- Jun 17

Greece	Italy	Portugal	Spain
-10%	-4%	-2%	-7%

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



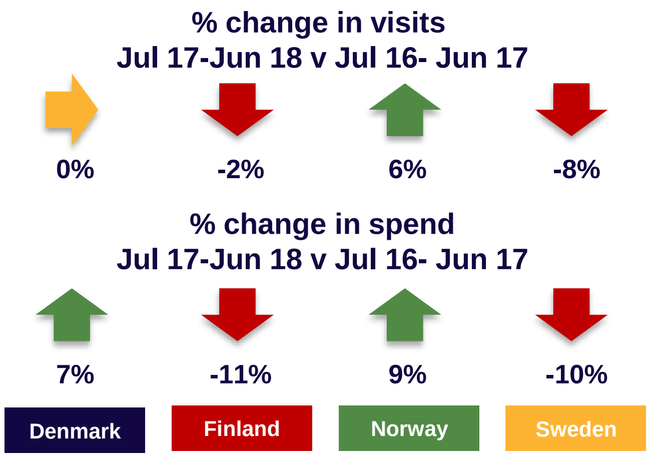
	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Greece	109	£48	212	£125
Italy	841	£339	1,787	£847
Portugal	227	£86	445	£191
Spain	1,169	£479	2,325	£999

Source: International Passenger Survey
*2018 figures are provisional and will be revised with the next quarterly and annual releases

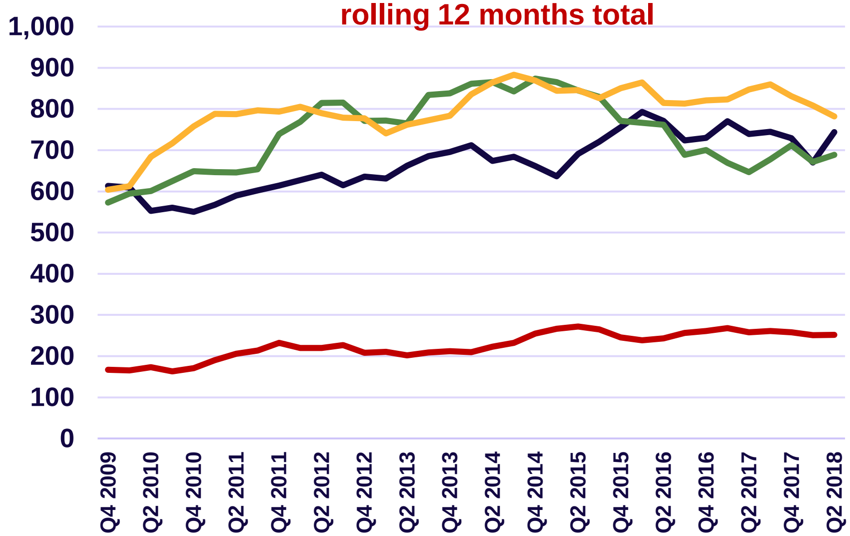
Nordics

It was a record Q2 for visits from **Denmark** and although up 41%, spend didn't quite set a new record. These results have helped visits from Denmark to the UK in set a new first six month record, with spend on par with the record start to 2013. **Finland** saw a 1% rise in visits during Q2, but spend was down 12%. Over the first six months and the longer term rolling 12 months to June 2018 visits and spend are both down. After weaker Q1 results, visits and spend from **Norway** in Q2 have both returned to positive territory. Norway is the only country in this Nordic group reporting positive results for both visits and spend over the latest 12 month period.

Strong headwinds were seen in Q2 visit results from **Sweden,** down 11%. This follows a Q1 decline of 13%. Q2 spend was down, but stronger Q1 results, means spend in the first half of 2108 is on par with the start of 2017.



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



	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Denmark	382	£182	744	£376
Finland	108	£53	252	£121
Norway	292	£175	689	£390
Sweden	370	£226	782	£451

Source: International Passenger Survey

*2018 figures are provisional and will be revised with the next quarterly and annual releases

Eastern Europe

Visits and spend from **Czech Republic** in Q2 2018 were both up – 22% and 29% respectively. The first half of the year saw visits rise 19%, with spend up 34%, though neither were a new record. Q2 was a tough quarter for visits from **Hungary** (down 16%), but spend rose 4%. Due to very strong Q3 2017 results, spending over the rolling year to June 2018 is up 64%.

Visits from **Poland** were up in Q2 2018 by 12% to a new Q2 record and helped set a new first half year record. Spend in Q2 was down by 1%, but with strong Q1 results was 14% up on the first half of 2017. Visits from **Romania** grew at pace in 2017, so results are down so far in 2018. Spend, however, was up 34% on the first half of 2017 to a record £202 million.

Visits from **Russia** fell 52% in Q2 2018 after rising 11% in Q1 – although this was in comparison to a very strong Q2 2017.

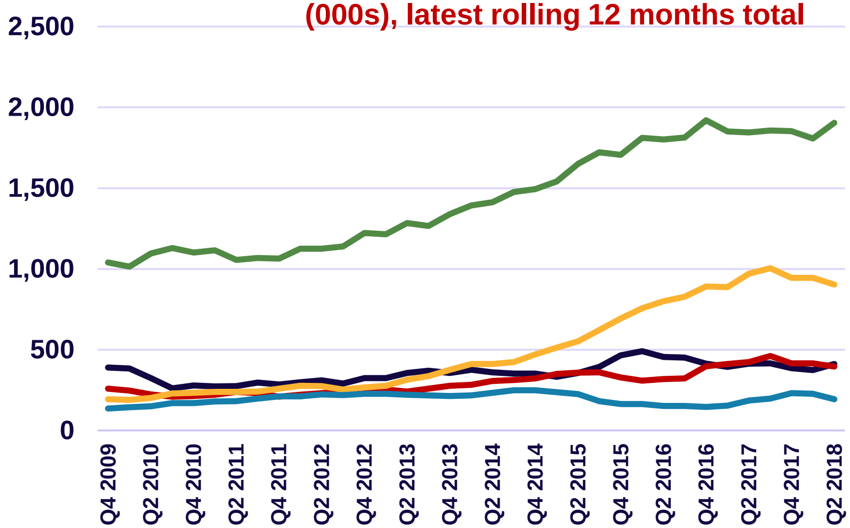
% change in visits
Jul 17-Jun 18 v Jul 16- Jun 17

Czech Rep	Hungary	Poland	Romania	Russia
-1%	-7%	3%	-7%	5%

% change in spend
Jul 17-Jun 18 v Jul 16- Jun 17

Czech Rep	Hungary	Poland	Romania	Russia
4%	64%	8%	24%	15%

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



	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Czech Rep	227	£65	411	£148
Hungary	187	£52	396	£144
Poland	967	£198	1,905	£418
Romania	441	£202	903	£350
Russia	85	£88	194	£178

Source: International Passenger Survey

*2018 figures are provisional and will be revised with the next quarterly and annual releases

English-speaking long-haul

Australia: overall in the first six months of 2018, visits were down slightly (3%), but spend was up 4% - setting a new first six month spending record. Due to strong second half of 2017 results, visits were 14% up on the 12 months to June 2017 and spending was up 8%.

Q2 2018 saw visits fall 3%, while spend rose 3% from **Canada**. Overall visits to the UK from Canada are down 3% in the first half of 2018 while spend is up 6%. While visits from **New Zealand** decreased in Q2, spend rose to a new Q2 record. Over the longer term, rolling 12 months to June 2018 visits are down 11%, while spend is up 2%.

Visits and spend in Q2 2017 from the **USA** were down, compared to the record setting Q2 2017. Both visits and spend are down over the first six months of 2018 and the longer term, rolling 12 months to June 2018.

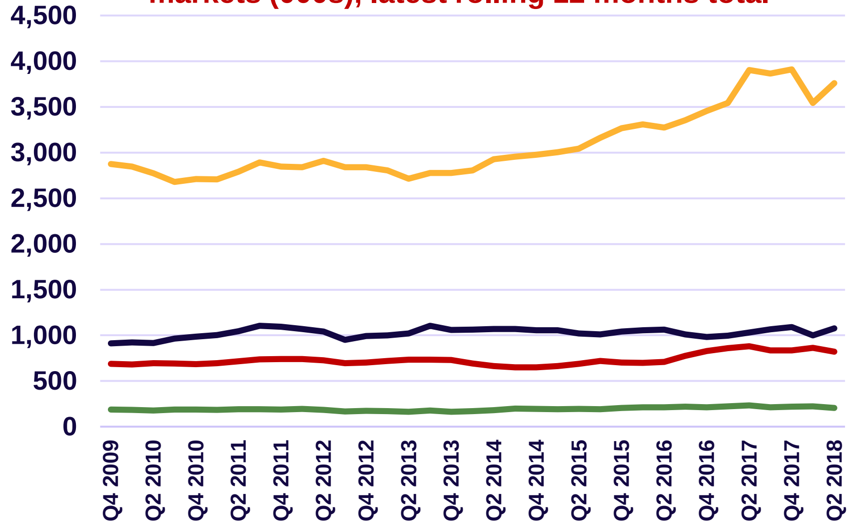
% change in visits
Jul 17-Jun 18 v Jul 16- Jun 17

Australia	Canada	New Zealand	USA
4%	-7%	-11%	-4%

% change in spend
Jul 17-Jun 18 v Jul 16- Jun 17

Australia	Canada	New Zealand	USA
8%	-2%	2%	-6%

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



	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Australia	442	£518	1,078	£1,212
Canada	367	£273	823	£620
New Zealand	82	£96	205	£216
USA	1,770	£1,640	3,762	£3,517

Source: International Passenger Survey

*2018 figures are provisional and will be revised with the next quarterly and annual releases

VisitBritain

Advanced Asia

2017 was a record year for visits and spend from **Hong Kong**. Following this, results for the first two quarters of 2018 have been down – in the first six months of 2017, visits were down 26%, while spend was 43% down. **Japan,** the largest market in this group both in terms of volume and value, saw visits up 10% in the first six months of this year and spend up 63% - though not reaching record levels. **Singapore** visits in the first half of 2018 were on par with the record setting start to 2017; spend was up 19%.

Visits from **South Korea** fell by 2% between January – June 2018. Visitor spending from South Korea rose 2% in the same period, posting strong Q2 2018 results. **Taiwan** results can be more volatile, due to sample sizes, but in the 12 months to June 2018 visits were up 75% while spend rose 20%.

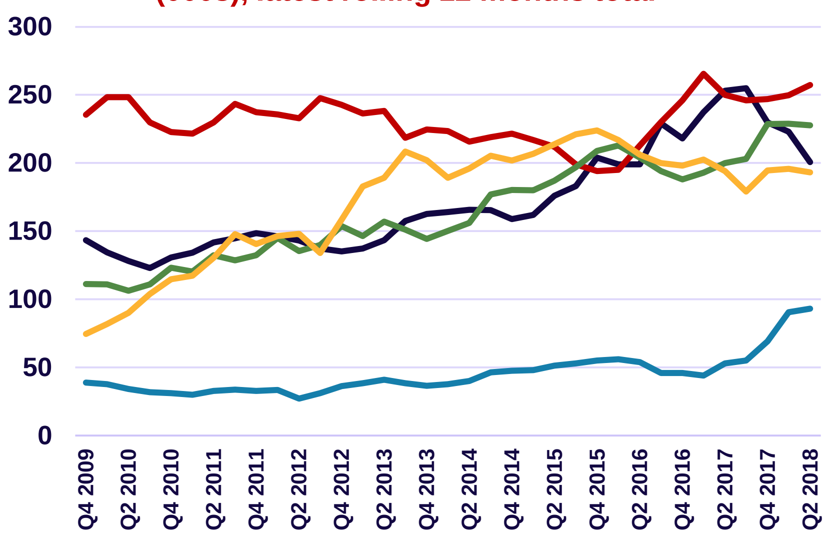
% change in visits
Jul 17-Jun 18 v Jul 16- Jun 17

Hong Kong	Japan	Singapore	S. Korea	Taiwan
-21%	3%	14%	-1%	75%

% change in spend
Jul 17-Jun 18 v Jul 16- Jun 17

Hong Kong	Japan	Singapore	S. Korea	Taiwan
-23%	33%	2%	-2%	20%

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



	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Hong Kong	84	£84	201	£237
Japan	119	£162	257	£312
Singapore**	95	£118	228	£285
South Korea**	82	£81	193	£186
Taiwan**	52	£55	93	£86

Source: International Passenger Survey

*2018 figures are provisional and will be revised with the next quarterly and annual releases

**Sample size less than n=100

Emerging Asia

Q1 and Q2 2018 **China** visits continue the record breaking trend set last year, up 19% to a record 137,000 in the first six months of 2018. While spend missed a Q2 record, a Q1 record means spend in the first six months of 2018 is 10% behind the start of 2017. **India** continues to generate high volumes of visits, although slightly down from record breaking results last year. Q2 2018 visits were down 28% against the Q2 2017 record, while Q2 2018 spend was down 21%. **Malaysia** results were down in the first six months of 2018, compared to the record start of 2017 – visits down 34% spend down 25%. **Thailand** is a smaller inbound market, and visit numbers are more volatile. In the 12 months from July 2017 to June 2018, visits were up 4% while spend rose 12%, compared to the previous 12 month period.

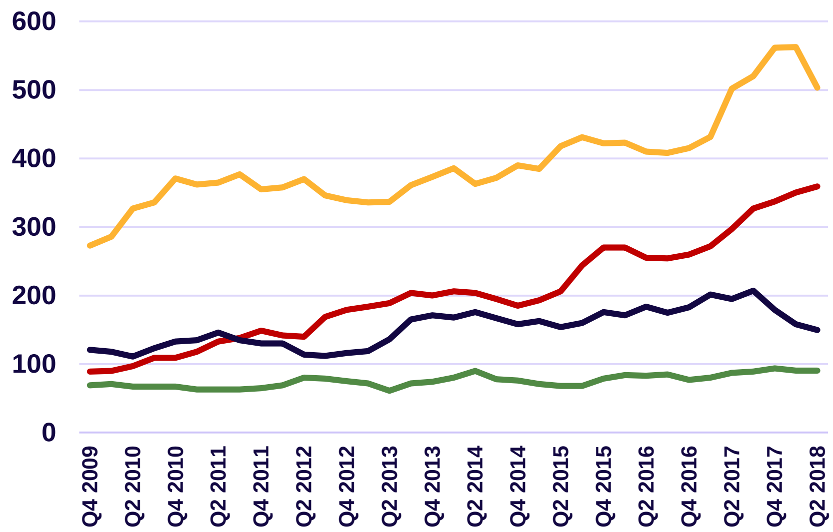
% change in visits Jul 17-Jun 18 v Jul 16- Jun 17

China	India	Malaysia	Thailand
21%	0%	-24%	4%

% change in spend Jul 17-Jun 18 v Jul 16- Jun 17

China	India	Malaysia	Thailand
13%	-14%	18%	12%

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



	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
China	137	£208	359	£671
India	222	£176	503	£403
Malaysia**	57	£66	150	£237
Thailand**	47	£64	91	£116

Source: International Passenger Survey

*2018 figures are provisional and will be revised with the next quarterly and annual releases

**Sample size less than n=100

The Gulf

Visits from the **UAE** rose 13% in Q2 2018 to a set a new record. Combined with results from Q1, visits from the UAE have set a new first half year record. Spend was down slightly in Q2 but is 4% ahead of the first six months of 2017. Compared to the record breaking Q2 2017, both visits and spend were down in the most recent quarter from **Saudi Arabia** and are down 3% and 10% respectively during the first half of 2018.

With smaller sample sizes, the rolling 12 month data (to June 2018) is more reliable for the remaining Gulf markets. **Bahrain** visits were down 7%, but spend was up 18%. **Kuwait** visits were on par with the previous period, with spend rising 24%. Neither market set new spending records.

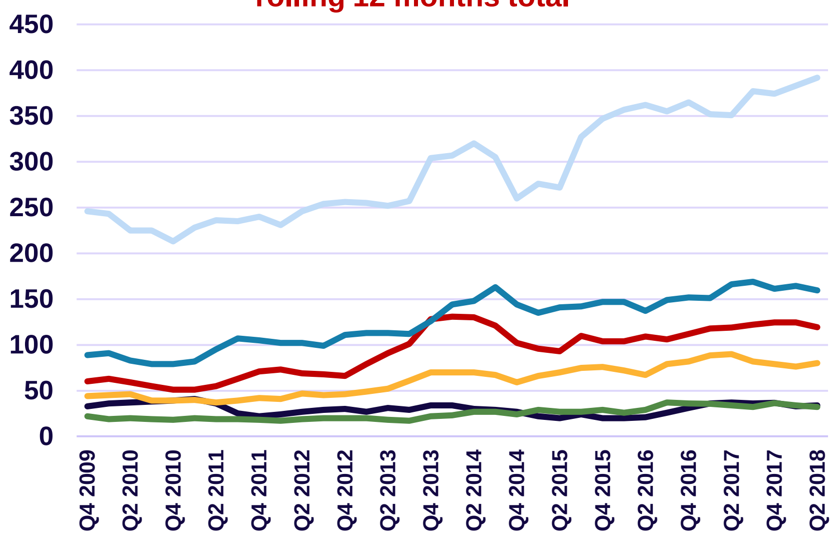
Oman and **Qatar** visits are down, but these are compared to previous record breaking periods.

% change in visits
Jul 17-Jun 18 v Jul 16- Jun 17

% change in spend
Jul 17-Jun 18 v Jul 16- Jun 17

	Bahrain	Kuwait	Oman	Qatar	Saudi Arabia	UAE
% change in visits	-7%	0%	-7%	-11%	-5%	11%
% change in spend	18%	24%	-3%	-13%	92%	10%

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



	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Bahrain**	12	£36	34	£97
Kuwait**	52	£130	119	£360
Oman**	9	£9	32	£54
Qatar**	37	£75	80	£172
Saudi Arabia**	62	£164	160	£845
UAE	153	£201	392	£626

Source: International Passenger Survey

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**Sample size less than n=100

Rest of Middle East & Africa

Nigeria visits were down 10% in the rolling 12 months to June 2018; spend was down 33% compared to the previous rolling 12 month period.

South Africa visits were up marginally by 1% in Q2 2018; spend rose 24%. In the first six months of 2018, visits were down 8% compared to the start of 2017, while spend was at record setting levels (up 13%).

The first half of 2018 was a record period for visits to the UK from **Israel** – thanks to strong Q1 results. Spending hasn't been as strong, down in both of the first two quarters of this year and down 28% compared to the start of 2017. Over the rolling 12 months to June 2018, **Turkey** saw visits and spend decline from the records set in the previous 12 month period. Visits from **Egypt** were up 27% in in the 12 months to June 2018 – though not enough to claim a record. Spend fell 44%.

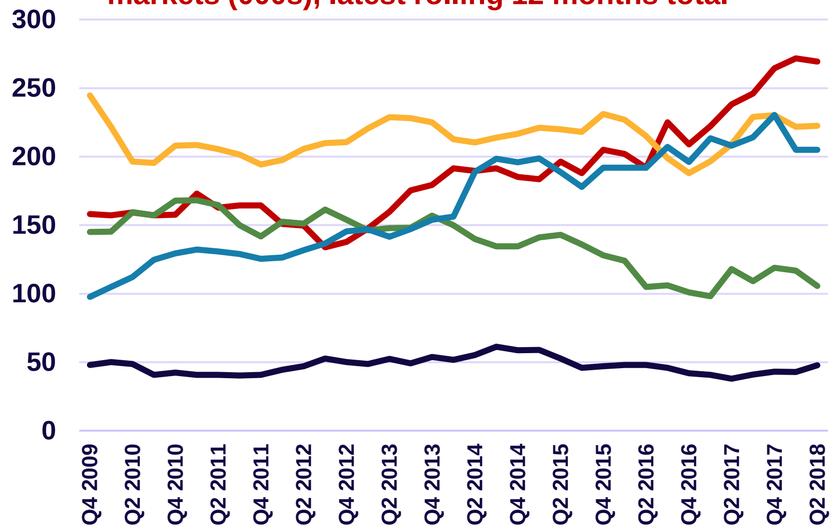
% change in visits
Jul 17-Jun 18 v Jul 16- Jun 17

Egypt	Israel	Nigeria	S. Africa	Turkey
27%	13%	-10%	6%	-2%

% change in spend
Jul 17-Jun 18 v Jul 16- Jun 17

Egypt	Israel	Nigeria	S. Africa	Turkey
-44%	18%	-33%	35%	-15%

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



	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Egypt**	22	£23	48	£57
Israel	122	£74	269	£224
Nigeria**	43	£62	106	£155
South Africa	93	£124	222	£275
Turkey**	78	£79	205	£159

Source: International Passenger Survey

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**Sample size less than n=100

Latin America

Visits from **Brazil** continued to recover throughout 2017, but has slipped in Q2 this year, against the record Q2 2017. These reduced results in Q2 mean the first half year results are down 7% for visits and 29% for spend.

Argentina is a smaller inbound market for the UK but has positive record setting results in each of the first two quarters of this year for both spend and visits. In the rolling 12 months to June 2018 visits are up 2% while spend rose 72% - not enough to claim the record from 2010.

Mexico visits set new records in each of the first two months of 2018 and are up 35% over the twelve months to June 2018. Spend has rocketed 59% in the 12 months to June 2018, compared to the previous 12 month period.

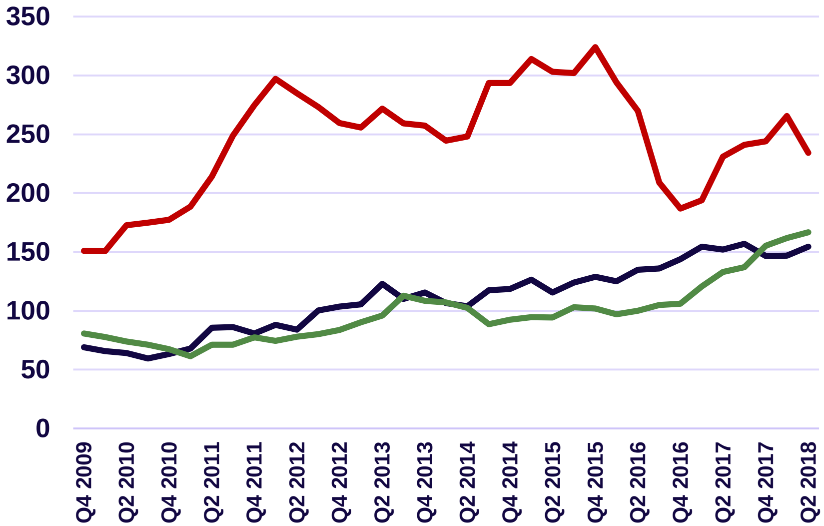
% change in visits
Jul 17-Jun 18 v Jul 16- Jun 17

Argentina	Brazil	Mexico
2%	1%	25%

% change in spend
Jul 17-Jun 18 v Jul 16- Jun 17

Argentina	Brazil	Mexico
72%	-16%	59%

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



	Year to date (Jan – Jun 18*)		Rolling 12 months (July 17 – June 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Argentina**	78	£56	154	£178
Brazil	126	£100	234	£222
Mexico**	78	£42	167	£110

Source: International Passenger Survey

*2018 figures are provisional and will be revised with the next quarterly and annual releases

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

November 2018