Monthly Inbound Update
March 2019

26th June 2019
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Our monthly update presents the latest International Passenger Survey (IPS) data released by the Office for National Statistics (ONS).

The Quarterly Release for this period (Q1, January – March 2019), which may contain some revisions, is scheduled to be released on 25th July 2019. This will provide data on visits by markets and UK region visited up to Q1 2019.

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.

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”. 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.
Headlines – March 2019 (provisional)

<table>
<thead>
<tr>
<th>ALL VISITS (000)</th>
<th>MARCH 2019</th>
<th>% change vs. Mar 2018</th>
<th>YEAR TO DATE (JAN - MAR 2019)</th>
<th>% change vs. Jan - Mar ‘18</th>
<th>ROLLING 12 MONTHS (APR 2018 - MAR 2019)</th>
<th>% change vs. Apr ’17 - Mar ’18</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL VISITS (000)</td>
<td>2,940</td>
<td>-2%</td>
<td>7,780</td>
<td>-1%</td>
<td>37,800</td>
<td>-3%</td>
</tr>
<tr>
<td>Spend (£ million)</td>
<td>1,650</td>
<td>-8%</td>
<td>4,260</td>
<td>-5%</td>
<td>22,690</td>
<td>-8%</td>
</tr>
</tbody>
</table>

- **Visits**: The UK received 2.9 million overseas visits in March 2019, down 2% year-on-year. There were 7.8 million inbound visits to the UK between January and March 2019, just 1% below the inbound visits in the same period in 2018 (although that was itself down on 2017’s record). Overseas visits to the UK in the twelve months to March 2019 were 3% behind April 2017 – March 2018 with 37.8 million visits.

- **Spending**: In March 2019 inbound visitors spent £1.65 billion, 8% behind the record breaking March in 2018. With inbound spending down year-on-year in the first three months of 2019, visitors spent 5% less in January-March 2019 than the record set in Q1 2018. Overall, overseas visitors to the UK spent £22.7 billion in the twelve months to March 2019, down 8% compared to the previous twelve-month period.

- **Spend per visit**: In the twelve months to March 2019 visitor spending decreased more rapidly than overseas visits; as a consequence spend per visit in this period was down 5% on the previous twelve-month period (April 2017 – March 2018), to £600 on average per visit.

All monthly data is provisional. Final 2019 data to be released later in 2020.
Journey Purpose

<table>
<thead>
<tr>
<th>By journey purpose</th>
<th>MARCH 2019</th>
<th>YEAR TO DATE (JAN - MAR 2019)</th>
<th>ROLLING 12 MONTHS (APR 2018 - MAR 2019)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Visits (000)</td>
<td>% change vs. Mar 2018</td>
<td>Visits (000)</td>
</tr>
<tr>
<td>Holiday</td>
<td>1,050</td>
<td>-1%</td>
<td>2,690</td>
</tr>
<tr>
<td>VFR</td>
<td>860</td>
<td>-5%</td>
<td>2,500</td>
</tr>
<tr>
<td>Business</td>
<td>840</td>
<td>2%</td>
<td>2,080</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>190</td>
<td>-7%</td>
<td>520</td>
</tr>
</tbody>
</table>

- **Holiday** visits decreased for the first time in 2019, with March 2019 inbound visits down 1% on March 2018, to 1.1 million. With more positive results in January and February 2019, overseas holiday visits to the UK in the first three months of 2019 were up 7% on January-March 2018, hitting 2.7 million visits. Overall, there were 15.3 million holiday visits in the last twelve months to March 2019, up 2% on the previous twelve-month period.

- **Visits to friends and relatives** (VFR) were down 5% year-on-year to 860,000 visits in March 2019. With sluggish results reported in 8 out of the last 12 months to March 2019, VFR visits to the UK in the those last twelve months were 3% below the previous rolling twelve months in 2017-2018 with 11.6 million visits.

- **Business** visits reached a new record for March, with 840,000 in March 2019 from inbound markets, up 2% year-on-year. However, with fewer inbound business visits in 9 out of the last 12 months, numbers in the latest rolling 12 months were 5% down on those seen between April 2017 and March 2018.

- **Miscellaneous** journey purpose visits are a combination of a wide range of different journey purposes, including (but not limited to) short term study, looking for work, shopping, attending a sports event and many more. Compared to the other journey purpose categories, miscellaneous visits represent a smaller proportion of inbound UK visits and results do tend to fluctuate. In March 2019 there were 7% fewer visits to the UK for miscellaneous purposes than in March 2018. With mostly negative year-on-year results reported in 2018 and in February and March 2019, miscellaneous visits in the rolling twelve months to March 2019 are down 15%, compared to the previous twelve-month period.

*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.*
In March 2019, there were 2.1 million visits to the UK from all EU markets, down 3% on the record-holding March 2018, and so still the second-highest March on record. With 5.4 million visits, visits in January-March 2019 were just behind 2018 (-1%). However, there were sluggish results in 8 of the last 12 months to March 2019, so the rolling twelve months to date were 2% behind the previous twelve-month period.

Visits to the UK from the EU15 markets followed a similar trend. There were 1.6 million visits to the UK in March 2019, down 5% on March 2018. Those visits were down 2% in both the first quarter of 2019 vs Q1 2018, and the last twelve months to March 2019 vs April 2017–March 2018.

Visits from Other EU markets to the UK reached a new record in March, up 3% on March 2018 to 480,000 visits. Following on a strong February 2019 as well, visits in Jan-March were the strongest first quarter to date, up 4% year-on-year to 1.2 million. The last twelve months to March 2019 were on par with the previous year, with 4.9 million visits.

Visits to the UK from the Rest of Europe were up 31% year-on-year in March 2019, with 200,000 visits, the second-best March on record. Looking at the last twelve months to March 2019, despite 3 of them showing positive results, visits over the longer term (rolling twelve months) declined 7% compared to the same time frame the year before.

There were 320,000 visits from North America in March 2019, 9% more than in March 2018. Visits in January-March 2019 were up 5% on Q1 2018 and the highest seen since 2006. However, with five out of the twelve months to March 2019 down year-on-year, visits in this period on this period were just on par with April 2017 – March 2018 visits.

‘Rest of World’ markets saw a 15% decline in visits in March 2019 vs March 2018. At a rolling twelve-month view, 6.0 million visits were received from ‘Rest of World’ markets, a 5% drop on April 2017 – March 2018.

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. The Q1 2019 release will provide data on visits by market.
Outbound and Competitors

Travel abroad by UK residents

<table>
<thead>
<tr>
<th>LAST THREE MONTHS: January – March 2019</th>
<th>% change vs. Jan – Mar 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (000)</td>
<td>+1%</td>
</tr>
<tr>
<td>Spend (£ million)</td>
<td>-3%</td>
</tr>
</tbody>
</table>

- UK residents took 13.4 million visits abroad in the first three months of 2019 – just 1% over the same period in 2018 – and spent £8.3 billion, down 3% (in nominal terms) on January – March 2018.
- Between January and March 2019, UK residents took 2% fewer both holiday and business trips abroad, and 3% fewer miscellaneous trips than they did during the same time in 2018, but more visits to friends and relatives (+9%) compared to the same period in 2018.
- Visits by UK residents to Europe overall were up 3% in January – March 2019, compared to the same period in 2018. Comparing January – March 2019 to those months in 2018, visits to EU15 countries were up 2%, while visits to other EU destinations were up 9%. Visits during those months fell by 14% to North America, and 2% to the Rest of World.

The international picture*

- All of the UK’s main competitors shown on the table below have reported an increase in 2018, to varying degrees.
- Strong growth in visits was seen by some of the UK’s main European competitors, such as France, the Republic of Ireland, The Netherlands, and Italy.
- Figures relate to different time periods so comparisons should be treated with caution.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Growth in overseas visits</th>
<th>Period (Jan 2018 to …)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turkey</td>
<td>22%</td>
<td>December</td>
</tr>
<tr>
<td>France</td>
<td>7%</td>
<td>December</td>
</tr>
<tr>
<td>Rep. of Ireland</td>
<td>7%</td>
<td>December</td>
</tr>
<tr>
<td>Netherlands</td>
<td>6%</td>
<td>December</td>
</tr>
<tr>
<td>Italy</td>
<td>6%</td>
<td>December</td>
</tr>
<tr>
<td>Australia</td>
<td>5%</td>
<td>December</td>
</tr>
<tr>
<td>Switzerland</td>
<td>4%</td>
<td>December</td>
</tr>
<tr>
<td>USA</td>
<td>4%</td>
<td>December</td>
</tr>
<tr>
<td>Germany</td>
<td>4%</td>
<td>December</td>
</tr>
<tr>
<td>Canada</td>
<td>1%</td>
<td>December</td>
</tr>
<tr>
<td>Spain</td>
<td>1%</td>
<td>December</td>
</tr>
<tr>
<td>UK</td>
<td>-4%</td>
<td>December</td>
</tr>
</tbody>
</table>

*Source: UNWTO Periods for which we have data available varies by country, so figures are indicative and not necessarily directly comparable.
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. However, the value of Sterling has been changing since.
- The value of Sterling against both the dollar and the euro has remained low since its weakest point in October 2016, although the pound rose against the dollar in 2017 before starting depreciating again in 2018. Sterling was down 6% year on year at $1.32 in March 2019. Against the euro, in March 2019, at €1.11, Sterling was 3% up compared to its value in March 2018, but 9% down compared to March 2016 (pre-referendum).
- In March 2019, Sterling was 3% up against the Australian dollar, 3% down against the Canadian dollar and stable against the Chinese Yuan compared to March 2018; but down 2%, 7% and 5% compared to March 2016 respectively.

Source: Bank of England
Individual markets – latest 12 month results

Using the latest available market level data, the following three charts show the percentage change in visits to the UK from a number of markets in the latest rolling year of data (the latest four quarters compared to the previous four quarters, in this case from *January 2018 – December 2018 v January 2017 – December 2017*).

**European markets**
- Belgium: -3%
- France: -7%
- Germany: -4%
- Italy: 2%
- Netherlands: -9%
- Denmark: 1%
- Greece: -6%
- Spain: 5%
- Portugal: -11%
- Austria: 5%
- Sweden: 0%
- Finland: -17%
- Irish Republic: -8%
- Turkey: -23%
- Switzerland: -18%
- Norway: -5%
- Czech Rep.: 10%
- Poland: 1%
- Romania: 5%
- Hungary: 5%
- Russia: -20%

**Asian and African markets**
- Hong Kong: 6%
- Malaysia: -8%
- Thailand: -1%
- Singapore: -22%
- China: 16%
- Japan: 0%
- South Korea: -17%
- Israel: 5%
- India: -9%
- South Africa: -3%
- Nigeria: -10%

**American, Gulf, Australasian markets**
- USA: -1%
- Canada: 2%
- Mexico: -1%
- Brazil: -2%
- Argentina: -6%
- Australia: -8%
- New Zealand: -2%
- UAE: 5%
- Saudi Arabia: 3%
- GCC combined: 3%

*More: Long term trends in visits from individual origin markets and world regions available [here.]*
Longer term trends
Visits and spend since 2001

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.

This clearly illustrates the dip in inbound tourism seen post 9/11 in 2001-02, and subsequent recovery in the mid-2000s. 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 continues into the first months of 2019.

Whilst visits growth has remained positive in recent years, spend has fluctuated more. As of March 2019, visits in the last twelve months were tracking 3% down and spend 8% down with mostly sluggish month-on-month results across the most recent rolling twelve months.

More: Data on long term trends are available here
Longer term trends

Journey Purpose

By journey purpose holiday visits were far more resilient to the economic downturn in the late 2000s and mostly have shown long term growth. There has been some variability in recent years. Trends have been different for most journey purposes since 2014.

- After a significant downturn in 2009, business visits have generally seen steady growth since, which intensified in 2015. However, they started slowing down again in 2017 and have been decreasing for most of the past 12 months.
- 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 and in the first months of 2019. Trips for other (miscellaneous) purposes account for a smaller number of visits and show the most variation with a downward trend in the last several months.

More: Data on long term trends are available here
Longer term trends
Global Region

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

- Until 2017, visits from EU markets were growing at a steady pace, but they have slowed down since and 2018 was down on 2017, still struggling to maintain at the beginning of 2019. Visits from ‘Other EU’ markets outside EU15 had stronger visit growth in 2013/2014 and between 2015 and 2017, although they have been inconsistent in recent months. Visits from the ‘Rest of Europe’ have been more volatile over the past few years, with a decline seen in 2018 and into 2019.
- Visits from North America grew strongly in 2017 and matched this level in 2018 and the first months of 2019 despite a decline early in 2018. Visits from the ‘Rest of World’ region were growing in 2017 but have been decreasing since mid-2018.

More: Data on long term trends are available here
Detailed monthly trends
Visits and spend

More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available [here](#).
Detailed monthly trends

Journey Purpose

Overseas Visits to the UK - Holiday Visits

Source: Office for National Statistics, International Passenger Survey

Overseas Visits to the UK - Visits to Friends and Relatives

Source: Office for National Statistics, International Passenger Survey

Overseas Visits to the UK - Business Visits

Source: Office for National Statistics, International Passenger Survey

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

Source: Office for National Statistics, International Passenger Survey

More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available here. Please note that different scales are used on these charts to allow differences to be identified.
Detailed monthly trends

Global Regions (1 of 2)

More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available here. Please note that different scales are used on these charts to allow differences to be identified.

Overseas Visits to the UK from the EU15 countries
Source: Office for National Statistics, International Passenger Survey

Overseas Visits to the UK from other EU countries
Source: Office for National Statistics, International Passenger Survey

Overseas Visits to the UK from non-EU countries in Europe
Source: Office for National Statistics, International Passenger Survey

Overseas Visits to the UK from the EU
Source: Office for National Statistics, International Passenger Survey
Detailed monthly trends
Global Regions (2 of 2)

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

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

More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available here. Please note that different scales are used on these charts to allow differences to be identified.
Definitions

EU15 - Austria, Belgium, Denmark, France, Finland, Germany, Greece, Irish Republic, Italy, Luxembourg, Netherlands, Portugal, Spain and Sweden. Note that the UK is among the 15 countries that formed the European Union prior to January 2004, but due to the inbound nature of the data displayed in the IPS reference tables data for the UK is excluded.

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.

EU – Total EU, therefore combined EU15 and Other EU (as defined above).

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
More information

The Inbound research & insights section of the VisitBritain website has 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.

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