

Q3 2017 UK IPS highlights (visits, spend and nights)

	Q3 2017 (July – September)	% change vs. Q3 2016
ALL VISITS (million)	10.9m	3%
Spend (£ billion)	£8.2bn	8%
Nights (million)	98.0m	1%

- **Q3 visits to the UK increased 3% to 10.9 million**, a new Q3 record and the highest ever quarter.
- Spending too reached best ever levels. **Q3 spending rose 8% to £8.2 billion**, a new Q3 spending record and the first quarter the UK has received more than £8 billion.
- In total **98.0 million nights** were spent in the UK by inbound visitors in Q3 2017, up 1% on July-September 2016 – not quite a record.

By journey purpose	Q3 2017 (July - September) Visits (million)	% change vs. Q3 2016	Q3 2017 (July - September) Spend (£bn)	% change vs. Q3 2016
Holiday	4.7m	7%	£4.1bn	19%
VFR	3.5m	7%	£2.0bn	20%
Business	1.9m	-9%	£1.2bn	-20%
Miscellaneous (& study)	0.8m	-8%	£0.9bn	-10%

Q3 2017 headlines (visits and spend by journey purpose)

- **Holiday** visits increased 7% to a Q3 record 4.7 million. Spending by visitors on holiday in the UK rose to £4.1 billion, up a solid 19% compared to Q3 2016. This is the first quarter on record where holiday spending has topped £4 billion. Holiday visits and spend growth have both eased in Q3 this year after a very strong Q1 and Q2.
- Visits to friends and relatives (**VFR**) were up 7% on the previous Q3 to a Q3 record of 3.5 million – the 4th consecutive quarter of record breaking visit levels. Spending for this group jumped 20% to £2 billion – not surprisingly the best ever VFR spending quarter.
- **Business** visits were down 9% on Q3 2016 to 1.9 million – the second year-on-year quarterly decline this year. Spending too has declined in the most recent quarter, down 20% compared to the record breaking Q3 2016 at £1.2 billion.
- Visits for **miscellaneous purposes** (including study) fell 8% on Q3 2016 to 830,000. Spend for this group fell 10% compared to Q3 last year.

2017 UK Year to date highlights - Q1, Q2 and Q3 2017

	YTD 2017 (Jan - Sep)	% change vs. 2016
ALL VISITS (million)	30.1m	7%
Spend (£ billion)	£19.0bn	11%
Nights (million)	223.6m	4%

- There were **30.1 million visits** to the UK in the first nine months of 2017 (up 7% compared to 2016 and setting a new record for this period).
- Visitors **spent £19.0 billion** during January to September, which is a new first nine month record of any year (up 11% on 2016).
- In total **223.6 million nights** were spent in the UK by inbound visitors during the last nine months, up 4% to set a new nights record for this period.

	YTD 2017 (Jan - Sep) Visits (million)	% change vs. 2016	YTD 2017 (Jan - Sep) Spend (£bn)	% change vs. 2016
Holiday	12.2m	15%	£8.6bn	25%
VFR	9.0m	5%	£4.4bn	16%
Business	6.6m	-3%	£3.8bn	-3%
Miscellaneous (& study)	2.3m	5%	£2.1bn	-14%

2017 UK Year to date headlines (visits and spend by journey purpose)

- **Holiday** visits rose 15% to a record 12.2 million, and spending rocketed 25% to set a record first nine months at £8.6 billion – posting double digit spend growth in each quarter of this year so far, compared to the start of 2016.
- Journeys to visit friends and relatives (**VFR**) increased by 5% in the first nine months of 2017, to 9.0 million. Spending also rose but by a stronger 16% to £4.4 billion. Both set new records for the time period.
- **Business** visits fell 3% between January and September this year to 6.6 million. Spending also decreased by 3%, to £3.8 billion. Prior to the decline seen so far this year, business visits had generally been in steady recovery since 2009.
- Visits for **miscellaneous purposes** (including study) grew by 5% to 2.3 million. However, spending fell 14% to £2.1 billion (compared to the first nine months of 2016).

MARKET LEVEL

Country of residence	Visits (000)			Spend (£m)		
	Q3 2016	Q3 2017P	Growth	Q3 2016	Q3 2017P	Growth
Australia	389	423	9%	410	459	12%
Belgium	279	296	6%	74	112	50%
Brazil	53	63	18%	87	67	-23%
Canada	321	274	-15%	246	198	-19%
China	123	153	24%	228	326	43%
Denmark	173	178	3%	74	96	30%
Finland	83	86	4%	45	42	-9%
France	895	868	-3%	411	332	-19%
Germany	1,001	1,037	4%	531	553	4%
Hong Kong	102	75	-27%	114	106	-7%
India	140	158	13%	144	131	-9%
Irish Republic	846	787	-7%	255	266	4%
Italy	508	498	-2%	331	256	-23%
Japan	81	77	-5%	95	94	-1%
Netherlands	532	585	10%	206	242	18%
Norway	139	171	22%	86	87	1%
Poland	473	485	3%	116	113	-3%
Portugal	94	105	12%	33	49	46%
Romania	192	226	18%	51	57	11%
Spain	584	640	10%	298	320	8%
Sweden	198	211	6%	119	118	-1%
Switzerland	263	229	-13%	407	171	-58%
United Arab Emirates	136	162	19%	249	298	20%
USA	1,222	1,186	-3%	1,113	1,124	1%
UK TOTAL	10,659	10,950	3%	7,603	8,189	8%

Q3 2017 visits and spending results for selected countries:

- **USA:** visits decreased 3% to 1.2 million in Q3 2017 (compared to Q3 2016). The USA is the most valuable inbound market to the UK so despite this fall in visit numbers it is encouraging to see Q3 2017 spending reaching a new record of £1.1 billion, up 1% on Q3 2016.
- **China:** visits to the UK from China grew 24% between July and September 2017 to a Q3 record 153,000. Spending also set a new Q3 record, up 43% to £326 million, more than twice as much as was spent in the UK by Chinese visitors in Q3 2012.
- **France:** In Q3 2017 there were 868,000 from France to the UK, 3% fewer than in Q3 2016. Spending was also down in Q3 this year (-19%) to £332 million. This is the first quarter of 2017 where year on year quarterly spend has fallen. (Q1 and Q2, spending rose 15% and 2% respectively).
- **Germany:** visits were up 4% to a little over 1 million in Q3, though not quite enough to set any new records. This is the second consecutive quarter of more than a million visits from Germany. Spending grew 4% to £553 million in Q3 (to be on par with the Q3 2014 record).
- **Australia:** visits were up 9% to 423,000 in Q3 this year, not quite enough to claim the record set in Q3 2011. Spending rose 12% to £459 million.
- **Canada:** Q3 saw visits from Canada decline 15%, compared to the record holding Q3 2016. There were 274,000 visits. Spending also declined compared to a record Q3 2016 to £198 million (down 19%).
- **Irish Republic:** visits decreased in Q3 2017, down 7% to 787,000, although visits have grown in the all other quarters so far this year. Spending from the Irish Republic has grown in Q3 2017, up 4% compared to Q3 2016, at £266 million.
- **Spain:** visits in Q3 reached new record heights of 640,000 (up 10%) – the 3rd consecutive record breaking quarter. Spending also rose, 8% to £320 million – though not a record.
- **India:** visitor levels grew 13% to a record 158,000. Although visitors spent £131 million in the UK during Q3 this year, it was 9% lower than the levels of spend in Q3 2016.
- **Brazil:** after reporting negative results for all quarters of 2016, visits from Brazil to the UK have been higher in each quarter this year. In Q3 2017 there were 63,000 visits to the UK (up 18%). Spending fell 23% compared to Q3 2016 to £67 million.
- **GCC combined:** visits from these combined countries were up 7% on Q3 2016 to a record 340,000. With an 84% rise on Q3 2016 spending (a total of £1.2 billion) spending has also set a new Q3 record. Q3 2017 is the best ever quarter for GCC spending. (GCC combined includes: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates)

Please note: All percentage changes in spend are nominal and data is provisional until the spring of 2018. All data is sourced from the International Passenger Survey by the Office for National Statistics.

Year to date (Q1, Q2 and Q3 2017) comparison – visits and spending results for selected countries:

Country of residence	Visits (000)			Spend (£m)		
	Q1, Q2 & Q3 2016	Q1, Q2 & Q3 2017P	Growth	Q1, Q2 & Q3 2016	Q1, Q2 & Q3 2017P	Growth
Argentina	115	128	11%	74	161	118%
Australia	792	876	11%	851	956	12%
Austria	221	246	11%	122	159	31%
Bahrain	23	28	25%	47	74	60%
Belgium	811	865	7%	231	305	32%
Brazil	145	199	37%	161	208	29%
Bulgaria	182	193	6%	49	63	28%
Canada	644	651	1%	506	454	-10%
China	201	268	33%	377	557	48%
Czech Republic	304	305	0%	122	105	-14%
Denmark	530	545	3%	256	261	2%
Finland	201	201	0%	106	98	-7%
France	3,025	3,014	0%	1,068	1,039	-3%
Germany	2,551	2,601	2%	1,204	1,261	5%
Greece	152	141	-7%	89	92	3%
Hong Kong	181	188	4%	208	253	22%
Hungary	263	328	25%	59	110	85%
India	332	436	32%	332	355	7%
Irish Republic	2,159	2,346	9%	725	732	1%
Israel	166	203	22%	105	202	92%
Italy	1,463	1,331	-9%	760	589	-22%
Japan	185	186	0%	174	193	10%
Kuwait	90	100	12%	182	324	79%
Malaysia	125	148	19%	153	228	49%
Mexico	86	117	35%	48	72	49%
Netherlands	1,542	1,655	7%	540	604	12%
New Zealand	181	183	1%	172	181	5%
Nigeria	80	88	10%	142	142	0%
Norway	505	483	-4%	303	248	-18%
Pakistan	47	52	9%	56	99	78%
Poland	1,419	1,356	-4%	291	288	-1%
Portugal	353	371	5%	150	150	0%
Qatar	66	66	1%	134	131	-2%
Romania	595	708	19%	222	208	-6%
Russia	116	166	44%	89	141	59%
Saudi Arabia	121	138	14%	287	794	177%
Singapore	136	151	11%	228	204	-11%
South Africa	143	184	29%	145	195	35%
South Cyprus	96	108	12%	104	86	-17%
South Korea	165	145	-12%	119	150	26%
Spain	1,713	1,895	11%	753	861	14%
Sweden	587	626	7%	302	342	13%
Switzerland	723	751	4%	661	452	-32%
Taiwan	38	46	23%	43	48	12%
Thailand	61	73	20%	65	89	38%
Turkey	152	170	12%	169	118	-30%
UAE	283	295	4%	437	484	11%
USA	2,688	3,099	15%	2,493	2,896	16%
UK TOTAL	28,177	30,105	7%	17,134	19,022	11%

- **USA:** visits were up 15% in the first nine months to a record of 3.1 million, driven by strong Q1 and Q2 results. The USA has overtaken France as the number 1 visit generating region in the first nine months of this year. USA visitor spending reached record levels for the first nine months of any year at £2.9 billion, and up 16% on the same period in 2016.
- **China:** has posted record breaking visit and spend results in each of the first three quarters of this year. Over the first nine months, visits were up 33% to a record level of 268,000 visits - almost twice as many as in the first nine months of 2012. Spending has also set new records. Chinese visitors spent a total of £557 million, 48% higher than in January to September 2016.
- **France:** visits to the UK in the first nine months of 2017 are on par with the first nine months of 2016 at 3 million. After growth in Q1, visit numbers from France have reported declines in both Q2 and Q3 of 2017. Visitor spending is down 3% to £1.0 billion in the first nine months of 2017, after particularly weak Q3 results (down 19%).
- **Germany:** visit numbers increased 2% to 2.6 million. Spending increased by 5%, compared to the same time last year to £1.3 billion, a new spend record for this period.
- **Australia:** there were record levels of visits to the UK from Australia in both Q1 and Q2 this year. Combined with a 9% rise in Q3, there have been 876,000 visits from Australia so far this year – 11% more than in 2016, but not quite enough to claim the record from 2011. Spending too has seen growth, up 12% to £956 million, although again not quite enough to claim a new record.
- **Canada:** visits are marginally higher in the last nine months compared to the same time last year (up 1%) to 651,000. Spending has fallen 10% compared to the record January –September 2016 to £454 million. £454 million is the second highest on record and 11% more than in 2015.
- **Irish Republic:** there were 2.3 million visits to the UK between January and September 2017 (up 9% on the same period of 2016). Spending was up marginally by 1% to £732 million.
- **Spain:** has broken visitor levels in all quarters so far this year. Over the first nine months of 2017 the UK has welcomed a record 1.9 million visits (11% more than in 2016). Spending too has reached record levels – up 14% to £861 million between January and September.
- **Poland:** despite setting a new Q3 visit record this year (485,000, up 3%), this has not been enough to offset the negative visitor levels in Q1 and Q2. Visit numbers in the first nine months of 2017 are 4% behind the record set in the same period of 2016. Spending levels were down marginally by 1% in the first nine months of 2017 (£288 million).
- **India:** has set both a new visit and spend record for the first nine months of a year. There were 436,000 visits (up 32% compared to the same time of 2016) who spent a combined £355 million (up 7% compared to the start of 2016).
- **Brazil:** after a tough 2016, both visit and spend levels from Brazil to the UK have rebounded. There were 199,000 visits in the first nine months of 2017 – 37% more than in the first nine months of 2016. Visitors spent £208 million between January and September 2017 – 29% more than the start of 2016. Neither have been quite enough to set a new record though.
- **South Korea:** there were 145,000 visits to the UK between January and September 2017 (down 12% on 2016). Spending was up by 26% to £150 million although short of a new record.
- **UAE:** have set a new January to September records for visits and spend. Visits were at a record 295,000 (up 4%), and spending a record £484 million (up 11% on the same time period in 2016).
- **Qatar:** visit levels reached 66,000 in the first nine months of 2017 – a record and on par with the first nine months of 2016. Visitor spending didn't quite reach record levels. Although spending £131 million this was 2% lower than the record holding first nine months of 2016.
- **Argentina:** there were a record 59,000 visits in Q3 from Argentina to the UK this year. With a new record also set in Q1 2017, visits for the first nine months have reached a record 128,000 (up 11%). Spending has also been a record breaker at £161 million, more than twice the amount spent in the first nine months of 2016 (+118%).
- **Mexico:** there were a record 117,000 visits in the first nine months of 2017 – up 35% on 2016. Spending was also up at £72 million (+49%), but not enough to claim a new record from 2010.
- **Italy:** with records set in the first nine months of 2016, it was always going to be difficult to set any new records this year. Indeed, both visits and spend are down. There were 1.3 million visits between January and September 2017, down 9%. Spending was down 22% to £589 million.
- **Netherlands:** both visits and spend set new records in the most recent nine months. Visits were up 7% to a record 1.7 million, while spending rose 12% to £604 million.

Please note: All percentage changes in spend are nominal and data is provisional until the spring of 2018. All data is sourced from the International Passenger Survey by the Office for National Statistics.