

Monthly Inbound Update September 2017

20th December 2017

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About this data

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 (Q3, July – September 2017), which may contain some revisions, is scheduled to be released **in January 2018**. This will provide data on visits by markets and UK region visited in 2017.

The next Monthly Release covering data for **October 2017** will be in early **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.

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 3,000-4,000 per month.

Headlines – September 2017 (provisional)

	SEPTEMBER 2017		LAST 3 MONTHS (JUL - SEP)		YEAR TO DATE (JAN - SEP 2017)		ROLLING 12 MONTHS (OCT 2016 - SEP 2017)	
		% change vs. Sep 2016		% change vs. Jul '16 - Sep '16		% change vs. Jan - Sep '16		% change vs. Oct '15 - Sep '16
ALL VISITS (000)	3,090	-1%	11,040	4%	30,200	7%	39,630	8%
Spend (£ million)	2,270	2%	7,820	3%	18,650	9%	24,060	7%

- Visits:** The UK welcomed 3.1 million overseas visits in September, down marginally by 1% compared to the record holding September 2016. Between July and September 2017 there were a record 11.0 million inbound visits to the UK, 4% up on the same period last year. The record setting continues over the first nine months of 2017 and the rolling 12 months to September 2017. There were 30.2 million visits to the UK in the first nine months of the year and 39.6 million visits in the 12 months to September 2017.
- Spending:** September 2017 spending rose 2% compared to September 2016 to reach £2.3 billion (a new September record). With record setting results in all of the first nine months of the year, inbound visitors spent a record £18.7 billion, 9% more than the first nine months of 2016. Over the longer term rolling 12 months to September 2017 visitors to the UK spent a record £24.1 billion in the UK – the highest ever rolling 12 month period.
- Spend per visit:** for the last 12 months average spend per visit was £607, which is slightly higher than the average for 2016 (£599). Spending growth has outpaced visit growth in six of the first nine months of 2017.

Journey Purpose

By journey purpose	SEPTEMBER 2017		LAST 3 MONTHS (JUL - SEP)		YEAR TO DATE (JAN - SEP 2017)		ROLLING 12 MONTHS (OCT 2016 - SEP 2017)	
	Visits (000)	% change vs. Sep 2016	Visits (000)	% change vs. Jul '16 - Sep '16	Visits (000)	% change vs. Jan - Sep '16	Visits (000)	% change vs. Oct '15 - Sep '16
Holiday	1,150	2%	4,770	8%	12,280	15%	15,510	15%
VFR	980	14%	3,490	8%	9,000	6%	12,040	8%
Business	710	-18%	1,940	-8%	6,590	-3%	9,000	-1%
Miscellaneous	250	-3%	840	-7%	2,330	5%	3,070	-1%

- **Holiday** visits were up 2% to a September record of 1.2 million. The record breaking continues over longer time periods as well. Between July and September 2017 there were 4.8 million holiday visits to the UK (8% more than the same three month period last year). So far this year there have been a record 12.3 million holiday visits and the latest 12 month period (October 2016-September 2017) is the strongest ever 12 month period for inbound holiday visits.
- **Visits to friends and relatives (VFR)** were up 14% to a September record of 980,000. These positive results have contributed to VFR visits tracking 8% higher in the most recent three months compared to July to September 2016. Overall there have been 9 million VFR visits to the UK in the first nine months of 2017 – the first time the UK has welcomed 9 million VFR visits in the first nine months of any calendar year.
- **Business** visits continue to be weaker in 2017, compared to 2016. Business visits were down 18% in September this year, compared to September 2016. With only January and May registering growth this year, there were 3% fewer business visits to the UK in the first nine months of 2017, compared to 2016.
- **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. In September 2017 visits to the UK were 3% down on September 2016 results. Visits were down 7% in the last three months but with double digit February and March 2017 results, miscellaneous visits were 5% up in the first nine months of 2017, compared to the same period last year (but not a record).

Global Regions

By global region	SEPTEMBER 2017		LAST 3 MONTHS (JUL - SEP)		YEAR TO DATE (JAN - SEP 2017)		ROLLING 12 MONTHS (OCT 2016 - SEP 2017)	
	Visits (000)	% change vs. Sep 2016	Visits (000)	% change vs. Jul '16 - Sep '16	Visits (000)	% change vs. Jan - Sep '16	Visits (000)	% change vs. Oct '15 - Sep '16
EU Total	1,930	2%	6,690	4%	19,550	4%	26,260	6%
EU15	1,510	0%	5,470	2%	15,920	3%	21,270	5%
Other EU	420	11%	1,220	11%	3,630	7%	4,990	10%
Rest of Europe	160	-23%	620	7%	1,870	9%	2,450	6%
North America	390	-8%	1,520	-2%	3,810	14%	4,760	15%
Rest of World	620	4%	2,230	7%	4,980	15%	6,180	11%

- Visits to the UK from all **EU markets** rose 2% in September 2017 to a September record of 1.9 million. EU visits have been tracking at record breaking year to date levels, reaching 19.6 million in the first nine months of 2017, 4% more than the same period of 2016.
- Looking specifically at visits from **EU15** markets, these were on par with September 2016 with 1.5 million visits. While visit numbers from this high volume region have been variable in each month of this year, on balance, visits for the first nine months of 2017 are at a record 15.9 million and 3% higher than the first nine months of 2016.
- Visits from all **Other EU** markets were 11% higher than September 2016 and is the fifth month of double digit year on year increases. Between January and September 2017 there have been a record 3.6 million Other EU visits, 7% more than in the first nine months of 2017. Results over the longer term are also at record levels. There have been 5.0 million visits in the twelve months to September 2017, the highest ever rolling twelve month period.
- Visit growth from the **Rest of Europe** in September has reversed recent trends – down 23% compared to September 2016. Buoyed by strong year on year monthly results for most months of 2017, visits for the first nine months of 2017 are 9% higher than the same time last year to a record setting 1.9 million.
- There were 390,000 visits to the UK from **North America** in September, the second consecutive month of year on year declines. These weaker months follow three consecutive months of record breaking levels (May, June and July). Visits from this region to the UK have combined to show strong growth so far this year (up 14% in the first nine months of 2017, compared to the same period of 2016), edging closer to the record levels recorded at the start of 2000.
- **Rest of World** reported a 4% rise in visits to the UK during September 2017. In the first nine months of this year, Rest of World visits are 15% higher than in the first nine months of 2016 at a record 5.0 million.

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 Q3 2017 release scheduled for January 2018 will provide data on visits by market.

Outbound and Competitors

Travel abroad by UK residents

LAST THREE MONTHS: July – September 2017		
		% change vs. Jul – Sep 2016
Visits (000)	23,660	-2%
Spend (£ million)	£15,720	-1%

- UK residents took 23.7 million visits abroad in the last three months – 2% fewer than the same period last year – and spent £15.7 billion, down 1% (in nominal terms) on last year.
- Between July and September 2017, UK residents took fewer holiday visits than they did during the same time last year (-2%), fewer business trips (-7%), more visits to friends and relatives (+3%) and fewer miscellaneous visits (-14%) compared to the same period last year.
- Visits by UK residents to Europe were down 1% during July to September 2017, compared to the same period the year before. Visits to EU15 countries fell 2% while visits to other EU destinations rose 9%. Visits to North America increased 5% compared to last year whilst Rest of World visits fell 12% year-on-year.

The international picture*

- All of the UK's main competitors on the table below reported an increase in visits at the start of 2017.
- The UK has performed well when compared to other EU countries such as Italy and Germany and in the mix against France.
- With the exception of the USA all main competitors here are in positive territory, with three countries reporting double digit growth so far this year.
- Figures relate to various periods so comparisons should be treated with caution.

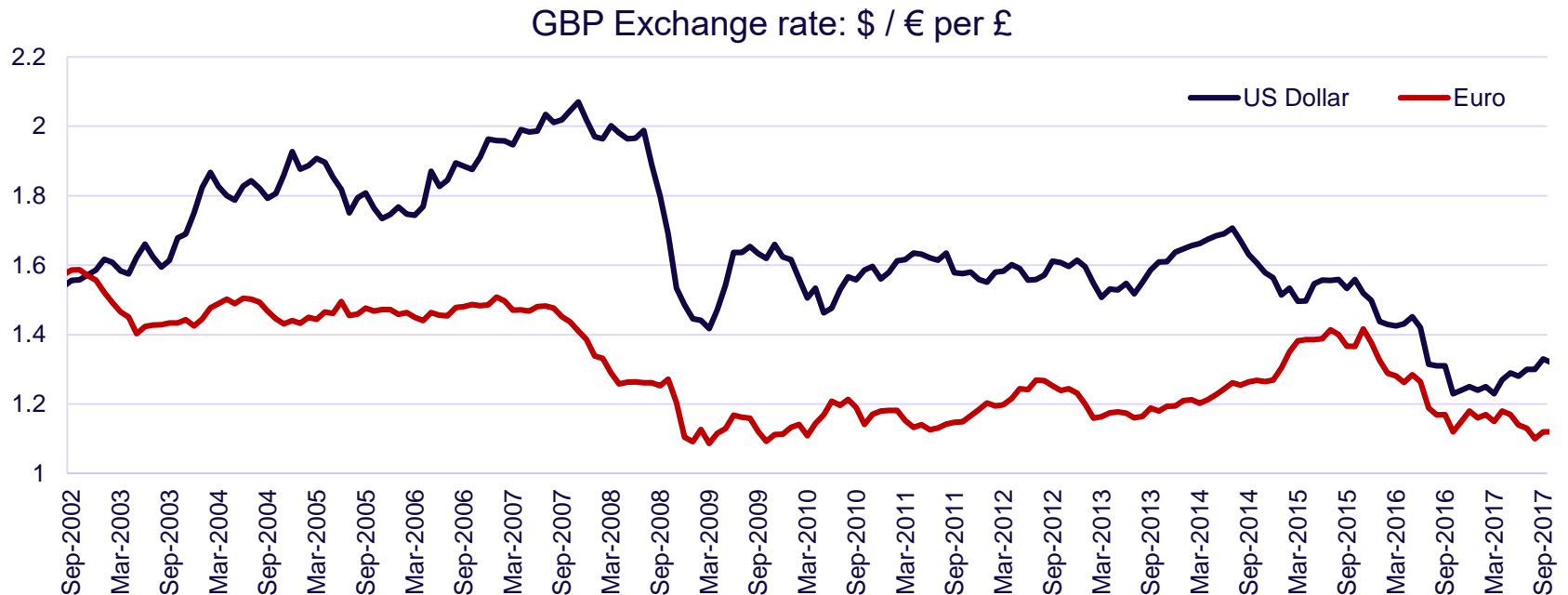
Destination	Growth in overseas visits	Period (Jan 2017 to ...)
Turkey	31%	September
Netherlands	13%	August
Spain	10%	September
France	8%	July
UK	7%	September
Australia	7%	August
Italy	7%	July
Switzerland	7%	September
Germany	6%	August
Canada	4%	August
Rep. of Ireland	3%	September
USA	-3%	May

More: VisitBritain attracts inbound visitors to Britain. For outbound travel from the UK visit [ONS website](#)

*Source: UNWTO Periods for which we have data available varies by country, so figures are indicative and not necessarily directly comparable.

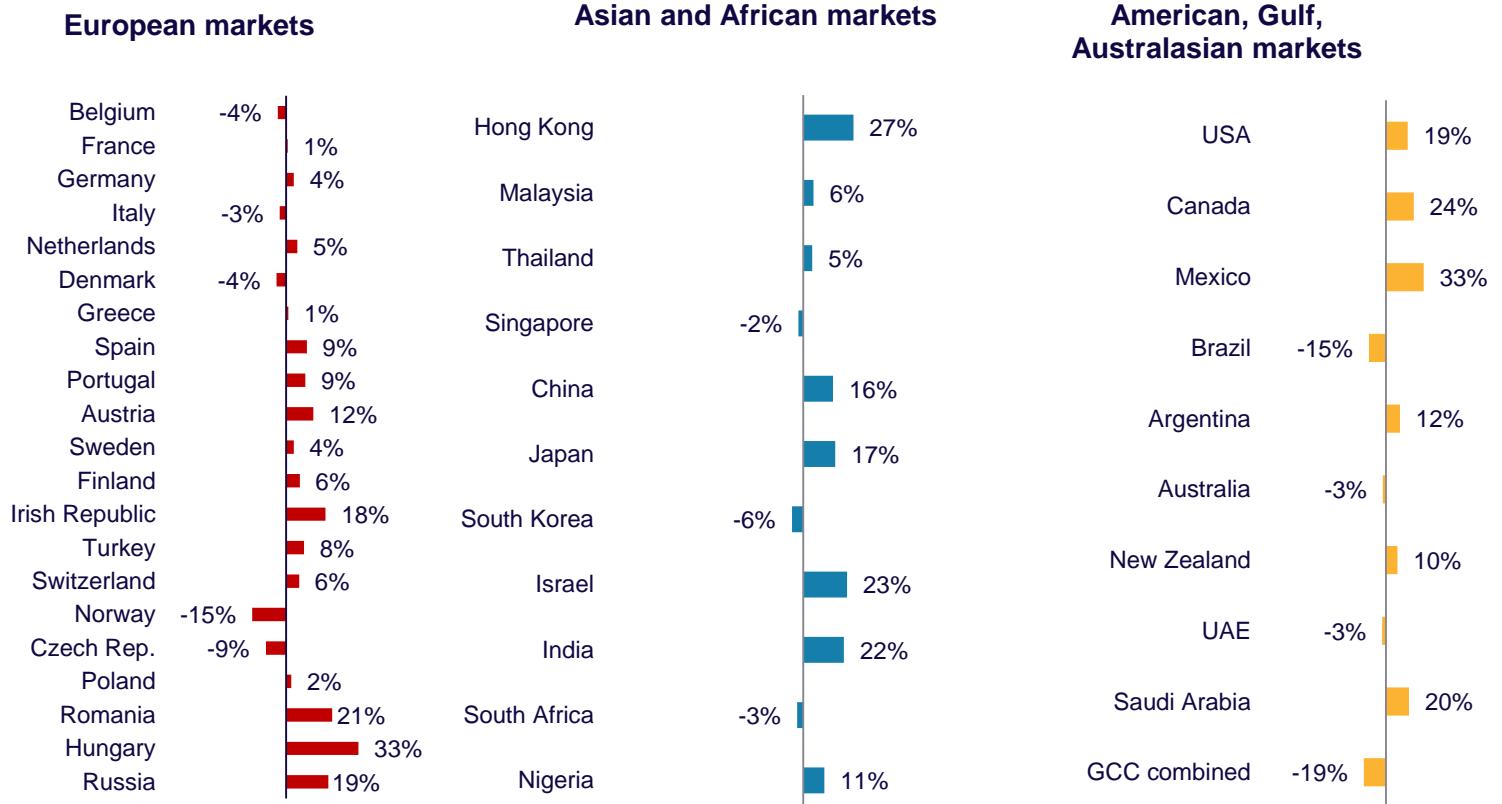
Exchange rates

- 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.
- The value of Sterling against both the dollar and the euro has remained low since its weakest point in September 2016, although has risen slightly against the US dollar recently. Sterling was down 5% against the Euro in September 2017 at €1.12. Against the US dollar Sterling was up 1% year on year at \$1.33, having gained from its most recent low point in March 2017; however, the pound is 13% cheaper than two years ago.
- In September, Sterling was 3% down against the Australian dollar, 5% down against the Canadian dollar and stable against the Chinese Yuan compared to September 2016.



Individual markets – quarterly results

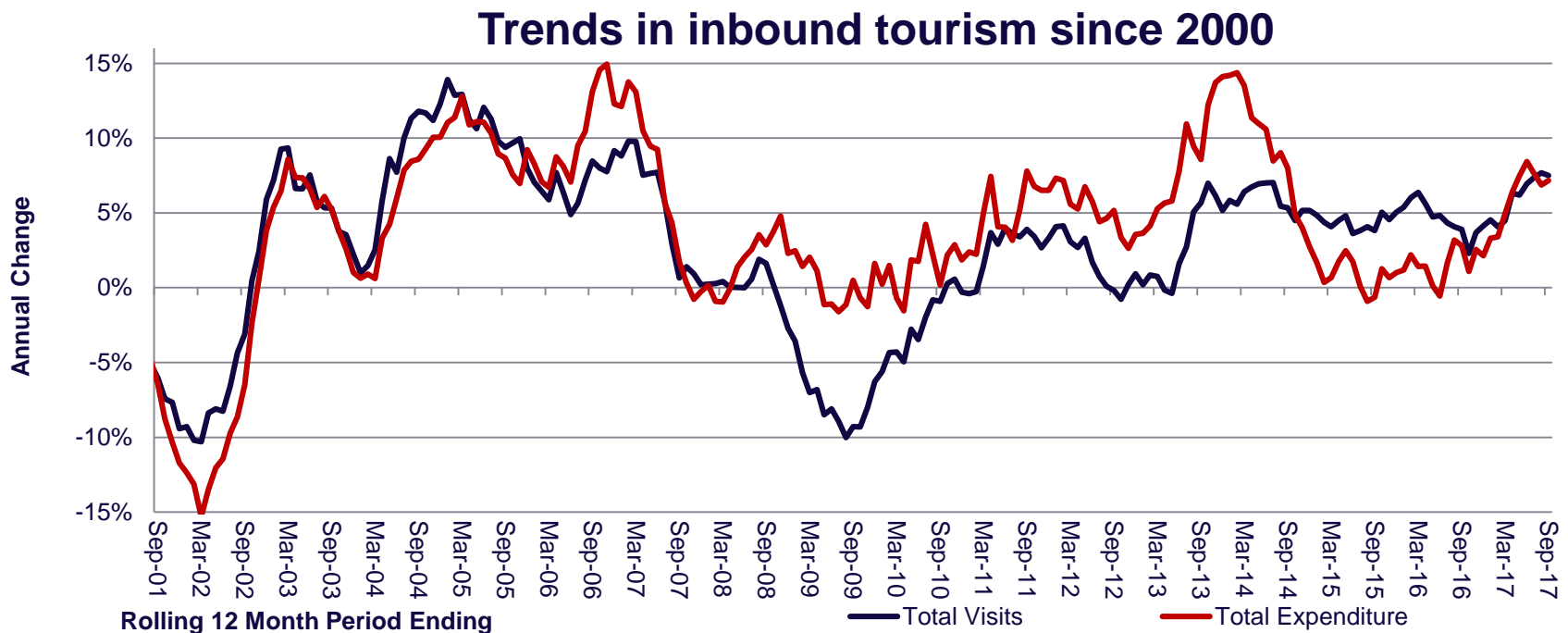
Using the latest available market level data, the following three charts show the percentage change in visits to the UK from a number of markets in the latest rolling year of data (the latest four quarters compared to the previous four quarters, in this case from **July 2016 – June 2017 v July 2015 – June 2016**).



More: Long term trends in visits from individual origin markets and world regions available [here](#).

Longer term trends

Visits and spend since 2001



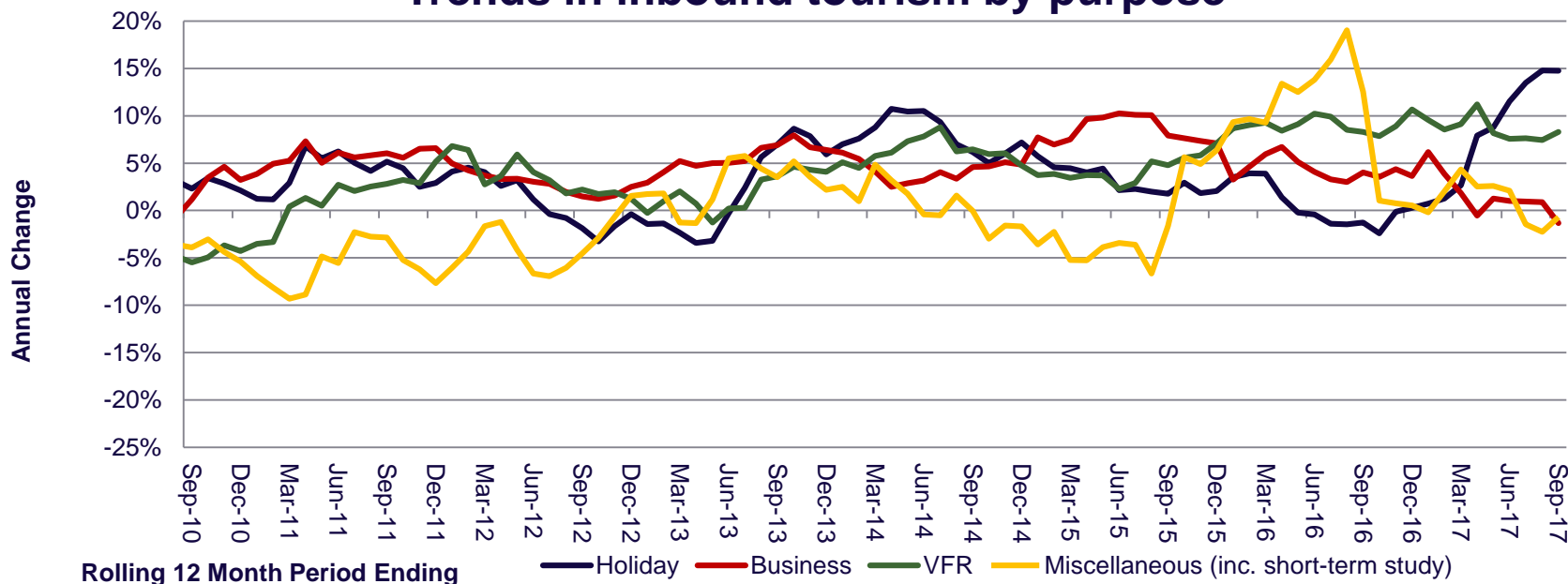
- This chart shows the year-on-year change in headline IPS results based on a 'rolling twelve month' basis. Presenting the data in this way enables us to spot emerging trends and helps to 'smooth out' erratic results for any single month.
- This clearly illustrates the dip in inbound tourism seen post 9/11 in 2002, 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 over the more recent years.
- Whilst visits growth has remained positive in recent years, spend has fluctuated more. Results for the last 12 month period to September 2017 show visits tracking 8% higher and spend up 7% compared to the previous 12 months.

More: Data on long term trends are available [here](#)

Longer term trends

Journey Purpose

Trends in inbound tourism by purpose

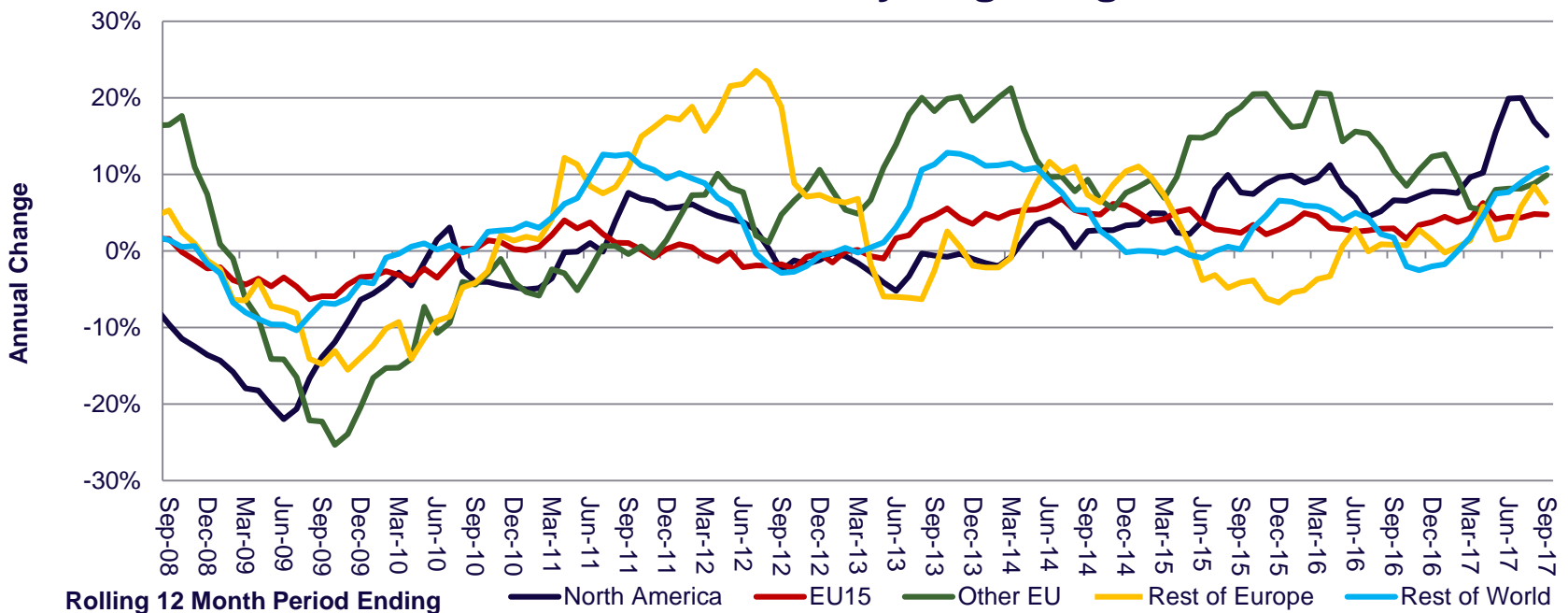


- By journey purpose holiday visits were far more resilient to the economic downturn in the late 2000s and have shown long term growth. There has been some variability in recent years; trends in 2014 and 2015 were positive but visit numbers for 2016 were flat; however, holiday visits are up 15% for the latest 12 month period, late 2016 having been a turning point.
- After suffering a significant downturn in 2009, business visits have seen steady growth since, which intensified in 2015 and through 2016. Results for 2017 so far have been more variable.
- Since 2011, trips to visit friends and relatives have largely shown growth in recent years, and have stayed in positive growth territory since mid-2013. Trips for other (miscellaneous) purposes account for a smaller number of visits and show the most variation.

Longer term trends

Global Region

Trends in inbound tourism by origin region since 2007

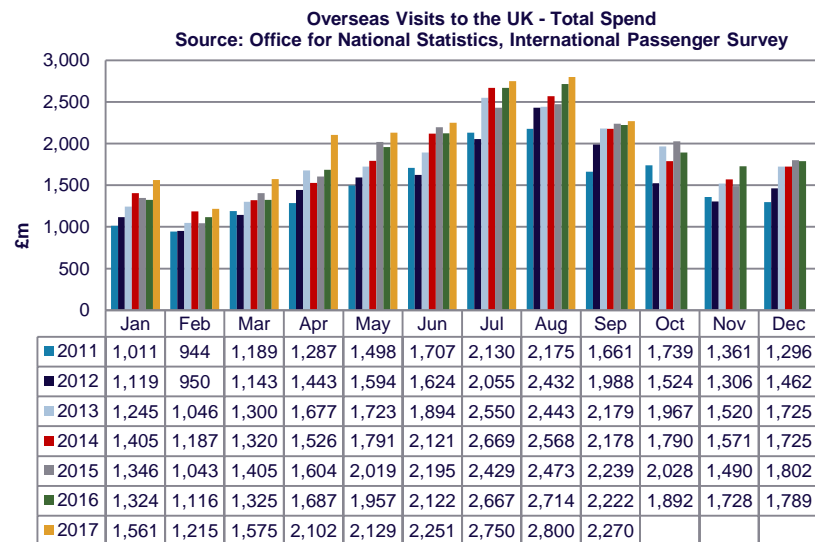
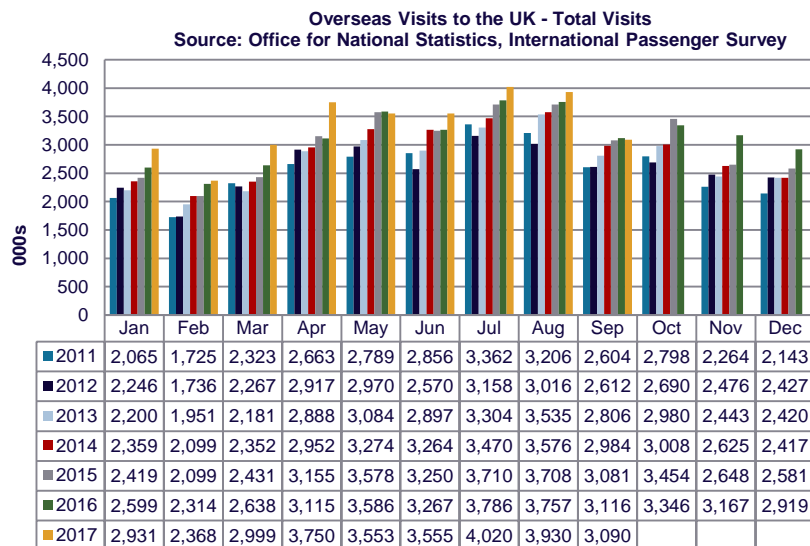


- This chart shows the longer term picture and the varying rates of recovery in visit numbers after the global financial crisis.
- Recently visits from EU15 markets have shown slow but steady growth. Visits from 'Other EU' regions had strong visit growth in recent years, although has been inconsistent in recent months. Visits from the 'Rest of Europe' had the strongest recovery growth between 2011/2012 although have shown to be more volatile over the past couple of years.
- After a period of gradual recovery post global financial crisis, visits from North America have grown strongly at the start of 2017 but slowing recently. Visits from the 'Rest of World' region had a couple of periods of strong growth, declined slightly in 2016 but have been growing in 2017.

More: Data on long term trends are available [here](#)

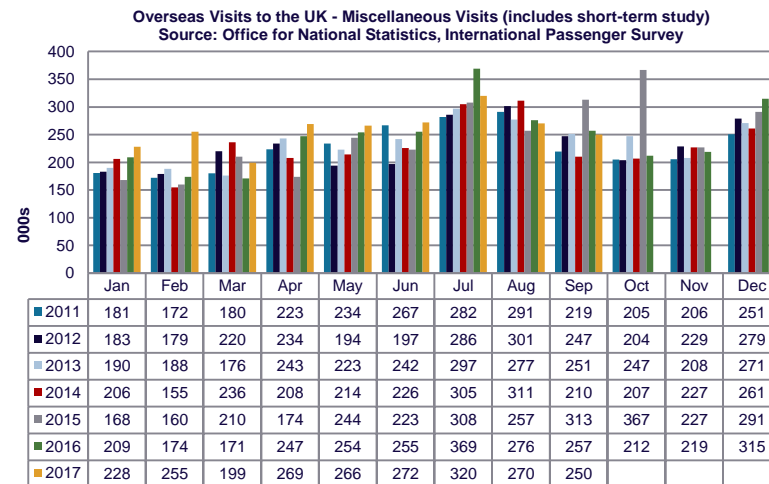
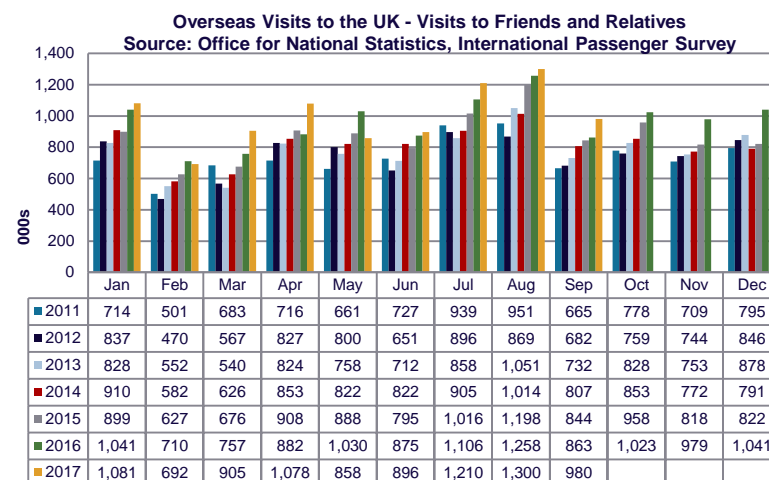
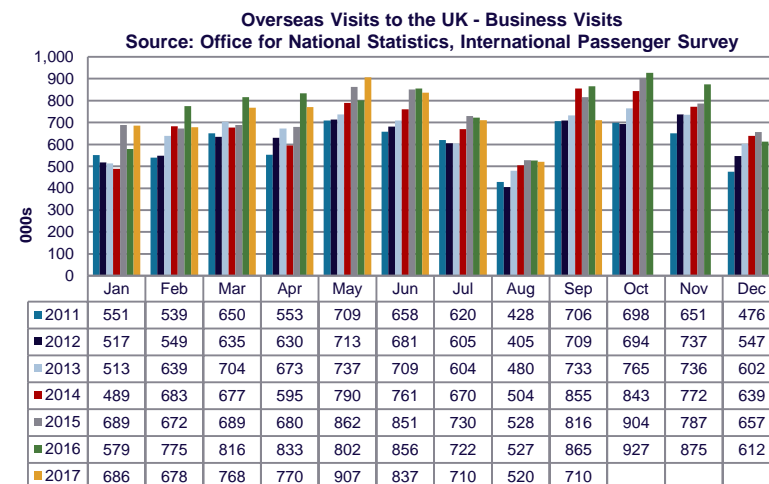
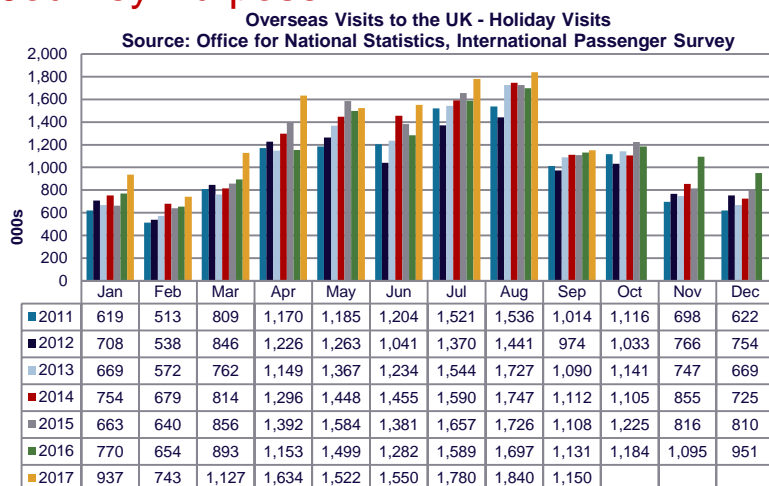
Detailed monthly trends

Visits and spend



Detailed monthly trends

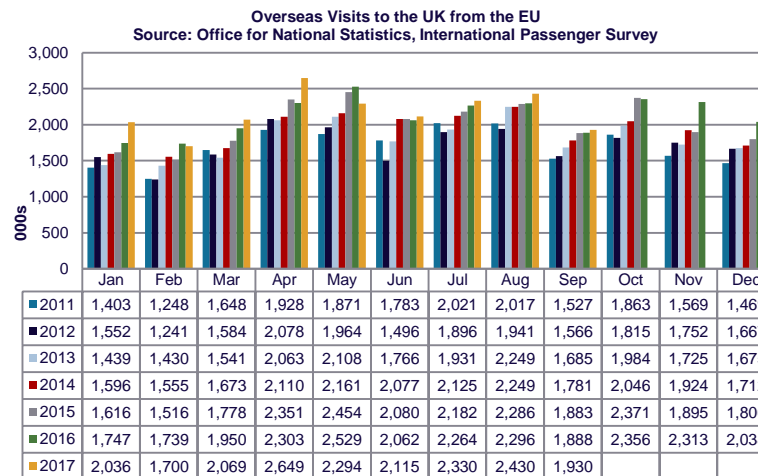
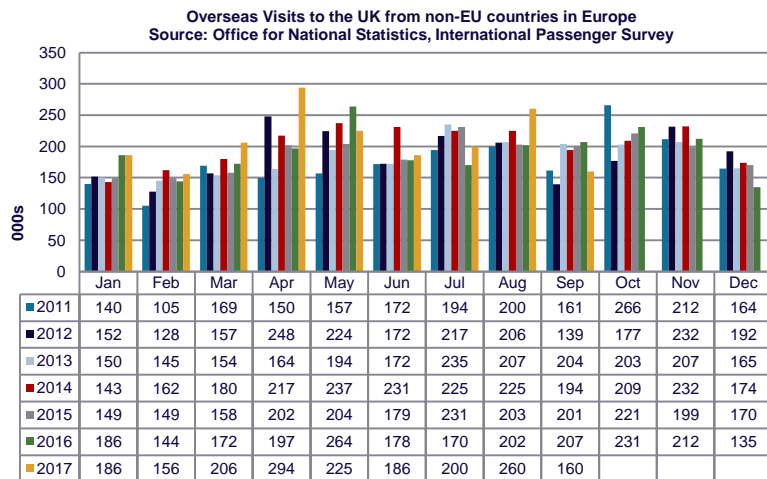
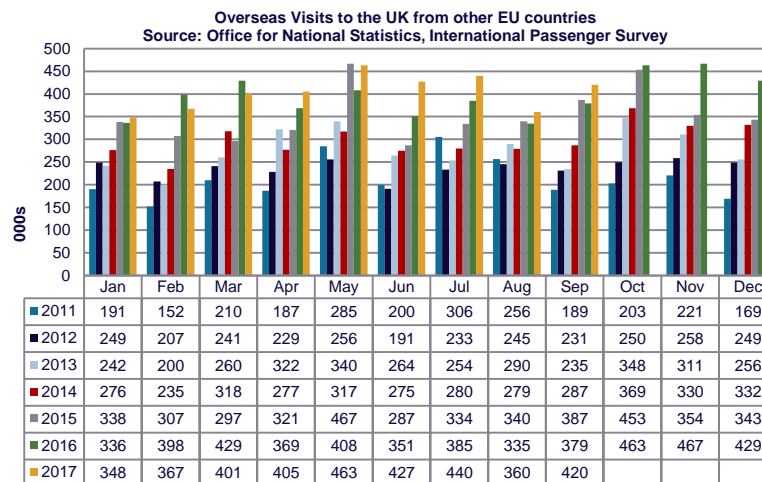
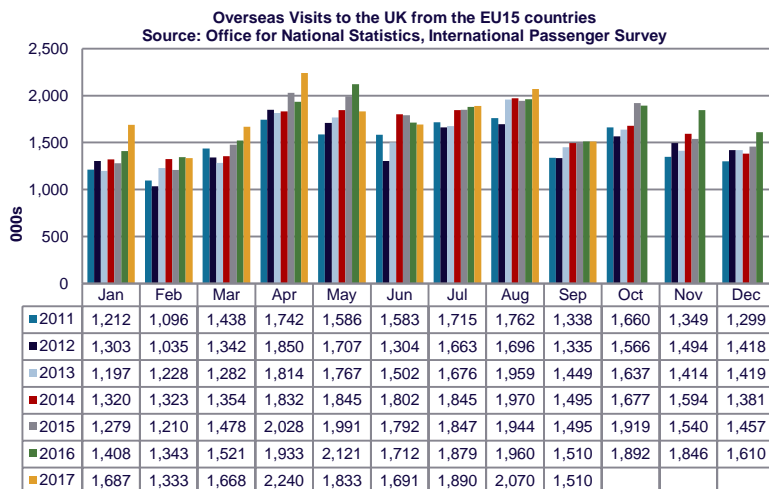
Journey Purpose



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

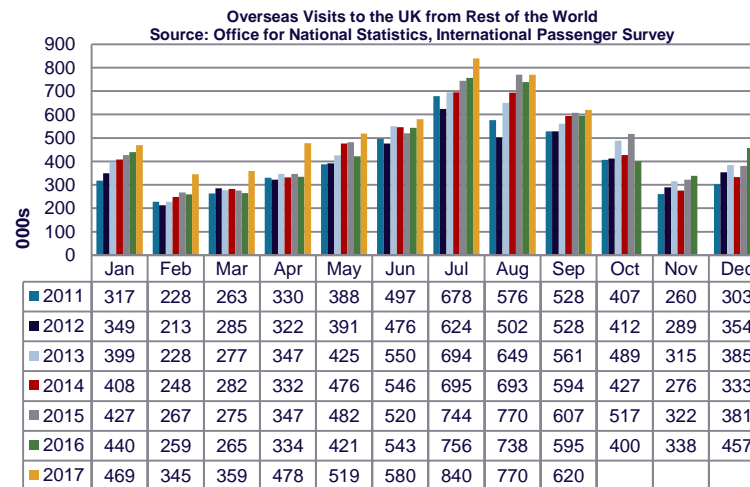
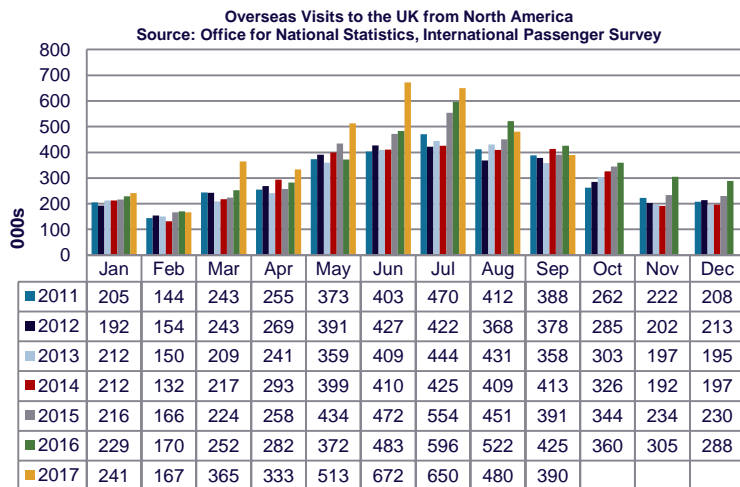
Global Regions (1 of 2)



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.

Detailed monthly trends

Global Regions (2 of 2)



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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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