

# Quarterly Inbound Update Q2 2018

11<sup>th</sup> October 2018

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# About this data

This report is based on the latest International Passenger Survey (IPS) data released by the Office for National Statistics (ONS) on the morning of 11<sup>th</sup> October 2018.

When available the [Inbound research & insights](#) section of the VisitBritain website will contain much more detail including on visits to UK regions.

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.

- All percentage changes in spend are nominal. All data is sourced from the International Passenger Survey by the Office for National Statistics.
- All figures quoted are not “seasonally adjusted”.
- Numbers in some tables / charts may not sum due to rounding.

Refer to the [ONS website](#) for more on IPS methodology and UK outbound travel

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Q2 2018

(April – June)

# Inbound market statistics



# UK Highlights

Q2 2018

Visits, spend and nights

	Q2 2018 (April – June)	% change vs. Q2 2017
<b>ALL VISITS (million)</b>	10.0m	-8%
<b>Spend (£ billion)</b>	£5.8bn	-10%
<b>Nights (million)</b>	65.4m	-9%

- 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).
- 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%.
- In total **65.4 million nights** were spent in the UK by inbound visitors during Q2 2018, down 9% year-on-year.

# UK Highlights

Q2 2018

Journey purpose

By journey purpose	Q2 2018 (April - June) Visits (million)	% change vs. Q2 2017	Q2 2018 (April - June) Spend (£bn)	% change vs. Q2 2017
Holiday	4.3	-8%	£2.8	-4%
VFR	3.0	6%	£1.3	-4%
Business	2.1	-15%	£1.1	-30%
Miscellaneous	0.5	-32%	£0.7	-6%

- **Holiday** visits and spend both fell from Q2 2017's records. Visits fell 8% to 4.3 million; spend fell by a milder 4% to £2.8 billion.
- 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.
- 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.
- Visits for **miscellaneous purposes** (including study) fell by 32% to 554,000 with spending down 6% to £670 million.

# UK Selected Market Highlights (1)

## Q2 2018

Country of residence	Visits (000)				Spend (£m)			
	Q2 2017	Q2 2018P	Growth	New record	Q2 2017	Q2 2018P	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%	

All quarterly data is provisional. Final 2018 data to be released in 2019.

\*sample size below 100

# UK Selected Market Summary (2)

## Q2 2018

- **USA:** visits decreased 12% to 1.1 million in Q2 2018 (compared to Q2 2017). The USA remains the most valuable inbound market to the UK, with more than £1 billion spent in the UK in Q2 but compared to the record spending set in Q2 last year, Q2 2018 saw inbound visitor spending decrease by 14%.
- **China:** visits to the UK from China grew 14% between April and June 2018 to a Q2 record 69,000 – this record follows a record Q1 2018. Spending was down 20% compared to Q2 last year, to £112 million.
- **France:** In Q2 2018 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.
- **Germany:** visits 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 posted a new quarterly record in 4 out of the 5 last quarters – Q2 2017, Q3 2017, Q4 2017 and Q1 2018.
- **Australia:** visits were down 1% to 277,000 in Q2 this year. Despite this small fall in visit numbers, visitors spent a record £345 million on our shores in Q2 2018, up 9%.
- **Canada:** Q2 saw visits from Canada decline 3%, compared to Q2 2017. There were 237,000 visits. Spending rose by 3% to £187 million – edging closer to the record set in Q2 2007.
- **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 has fallen in Q2 2018, down 4% compared to Q2 2017, at £216 million.
- **Denmark:** reported a 45% rise in visits to the UK in Q2 2018, to reach a record 236,000. Although also rising, by 41% to £102 million, spending in Q2 wasn't quite enough to beat the record set in Q2 2013.
- **GCC combined:** visits from these combined countries were up 1% on Q2 2017 to a record 163,000 – a new Q2 record. Spending, however fell 28% to £257 million in Q2 this year compared to the record Q2 2017. *(GCC combined includes: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates)*



Year to Date 2018  
(January – June)  
**Inbound market  
statistics**



# UK Highlights

Year to Date (Q1 and Q2 2018)

Visits, spend and nights

	YTD 2018 (Jan - Jun)	% change vs. 2017
<b>ALL VISITS (million)</b>	17.9	-7%
<b>Spend (£ billion)</b>	£10.3	-5%
<b>Nights (million)</b>	115.5	-8%

- There were **17.9 million visits** to the UK in the first six months of 2018 (down 7% compared to the record start of 2017).
- Visitors **spent £10.3 billion** during January to June 2018. As can be seen with visits, this is down 5% compared to the record spent by inbound visitors in the first half of 2017.
- In total **115.5 million nights** were spent in the UK by inbound visitors during the first six months of 2018, down 8% compared to the record set in the same period of 2017.

# UK Highlights

Year to Date (Q1 and Q2 2018)

Journey purpose

	YTD 2018 (Jan - Jun) Visits (million)	% change vs. 2017	YTD 2018 (Jan - Jun) Spend (£bn)	% change vs. 2017
<b>Holiday</b>	6.8	-9%	£4.4	-4%
<b>VFR</b>	5.6	2%	£2.6	4%
<b>Business</b>	4.3	-8%	£2.3	-13%
<b>Miscellaneous</b>	1.1	-24%	£1.0	-10%

- **Holiday** visits fell 9% in the first six months of 2018, compared to the record start of 2017, to 6.8 million. Inbound holiday visitor spending also fell during the first half of 2018 – down 4% compared to the record set at the start of 2017.
- Journeys to visit friends and relatives (**VFR**) increased by 2% in the first six months of 2018, to 5.6 million. Spending also rose but by a stronger 4% to £2.6 billion. Both set new records for the time period.
- **Business** visits fell 8% between January and June this year to 4.3 million. Spending also decreased, by 13%, to £2.3 billion.
- Visits for **miscellaneous purposes** (including study) decreased by 24% to 1.1 million. Spending also decreased but by a softer 10% to £1.0 billion (compared to the first six months of 2017).

# UK Selected Market Highlights (1)

## Year to Date (Q1 and Q2 2018)

Country of residence	Visits (000)			Spend (£m)		
	Q1 & Q2 2017	Q1 & Q2 2018P	Growth	Q1 & Q2 2017	Q1 & Q2 2018P	Growth
Argentina*	70	78	11%	£53	£56	5%
Australia	456	442	-3%	£500	£518	4%
Austria	146	149	2%	£90	£70	-22%
Belgium	571	573	0%	£194	£213	10%
Brazil	136	126	-7%	£142	£100	-29%
Bulgaria*	124	146	18%	£29	£43	45%
Canada	380	367	-3%	£257	£273	6%
China	115	137	19%	£231	£208	-10%
Czech Republic	190	227	19%	£48	£65	34%
Denmark	368	382	4%	£165	£182	10%
Finland	115	108	-6%	£57	£53	-6%
France	2,145	1,947	-9%	£707	£681	-4%
Germany	1,561	1,542	-1%	£709	£682	-4%
Greece*	110	109	-1%	£64	£48	-24%
Hong Kong	113	84	-26%	£146	£84	-43%
Hungary	206	187	-9%	£45	£52	16%
Iceland*	69	52	-25%	£46	£36	-22%

# UK Selected Market Highlights (2)

## Year to Date (Q1 and Q2 2018)

Country of residence	Visits (000)			Spend (£m)		
	Q1 & Q2 2017	Q1 & Q2 2018P	Growth	Q1 & Q2 2017	Q1 & Q2 2018P	Growth
India	280	222	-21%	£226	£176	-22%
Indonesia*	22	26	16%	£26	£32	24%
Irish Republic	1,555	1,252	-20%	£465	£434	-7%
Israel	117	122	4%	£104	£74	-28%
Italy	834	841	1%	£333	£339	2%
Japan	109	119	10%	£99	£162	63%
Kuwait*	57	52	-9%	£164	£130	-21%
Latvia*	75	64	-15%	£22	£19	-15%
Lithuania	178	174	-2%	£40	£67	67%
Luxembourg*	39	44	13%	£22	£26	18%
Malaysia*	86	57	-34%	£89	£66	-25%
Malta*	62	35	-44%	£34	£16	-53%
Mexico*	67	78	17%	£33	£42	26%
Netherlands	1,072	901	-16%	£362	£323	-11%
New Zealand	97	82	-16%	£94	£96	2%
Nigeria*	57	43	-23%	£97	£62	-36%
Norway	315	292	-8%	£163	£175	8%
Pakistan*	18	43	135%	£54	£42	-23%
Philippines*	27	24	-10%	£20	£17	-12%
Poland	869	967	11%	£174	£198	14%

# UK Selected Market Highlights (3)

## Year to Date (Q1 and Q2 2018)

Country of residence	Visits (000)			Spend (£m)		
	Q1 & Q2 2017	Q1 & Q2 2018P	Growth	Q1 & Q2 2017	Q1 & Q2 2018P	Growth
Portugal	264	227	-14%	£102	£86	-15%
Qatar*	36	37	3%	£94	£75	-20%
Romania	483	441	-9%	£151	£202	34%
Russia	118	85	-28%	£98	£88	-10%
Saudi Arabia*	64	62	-3%	£182	£164	-10%
Singapore*	95	95	-1%	£99	£118	19%
Slovakia*	99	79	-20%	£28	£22	-20%
South Africa	101	93	-8%	£110	£124	13%
South Cyprus*	73	43	-41%	£61	£26	-57%
South Korea*	83	82	-2%	£79	£81	2%
Spain	1,257	1,169	-7%	£541	£479	-11%
Sweden	419	370	-12%	£226	£226	0%
Switzerland	522	370	-29%	£281	£199	-29%
Taiwan*	28	52	85%	£34	£55	59%
Thailand*	50	47	-6%	£58	£64	12%
Turkey*	103	78	-25%	£75	£79	5%
United Arab Emirates	135	153	13%	£193	£201	4%
USA	1,918	1,770	-8%	£1,767	£1,640	-7%

# UK Selected Market Highlights (4)

## Year to Date (Q1 and Q2 2018)

- **USA:** visits were down 8% in the first six months to 1.8 million compared to the record start to 2017. USA visitor spending was also down, again against the record first six months of last year. Putting the record start of 2017 to one side, it is encouraging to see visits up 21% in the first half of 2017, compared to 2016, and inbound visitor spending up 19%.
- **China:** has posted record breaking visit results in both of the first two quarters of this year. Over the first six months, visits were up 19% to a record level of 137,000 visits – more than twice as many as in the first six months of 2013. While Q1 was a record spending quarter, a decline in Q2 means Chinese visitors spent a total of £208 million, 10% lower than in January to June 2017.
- **France:** visits to the UK in the first six months of 2018 were 9% down on first six months of 2017 at 1.9 million. This is the 5<sup>th</sup> consecutive quarter of year on year visit declines. Visitor spending was down 4% to £681 million in the first six months of 2017, after declines in both of the first two quarters of this year.
- **Australia:** the first half of 2017 posted record levels of visits so year on year comparisons are showing declines in both Q1 and Q2. The net result is 442,000 visits in the first half of 2018, 3% fewer than the start of 2017. Spending wasn't as strong in the first half of 2017 and therefore spending has risen 4% between January and June this year to a new first six month record of £518 million.
- **India:** set new first half year visits and spend records in 2017. In the first half of 2018, there were 222,000 visits (down 21% compared to the same time of 2017) who spent a combined £176 million (down 22% compared to the start of 2017). Encouragingly, visits between January and June were 16% higher than the start of 2016.

# UK Selected Market Highlights (5)

## Year to Date (Q1 and Q2 2018)

- **Japan:** in the first six months of 2018 inbound visits from Japan to the UK were up 10% on the start of 2017 at 119,000. This is the third consecutive first half year on year visit rises. Spending during the first six months of 2018, rocketed a massive 63%, compared to the start of 2017 - although this is not quite enough to claim a new record from 2009 – but close.
- **Spain:** has fallen short of 2017 visitor and spending levels in each quarter so far this year, though the start of 2017 was a record breaker. Over the first six months of 2018 the UK has welcomed a 1.2 million visits (7% fewer than in 2017). Spending too has declined – down 11% to £479 million between January and June 2018.
- **Italy:** set new visit and spend records in Q1 this year, but posted slightly weaker Q2 results. Overall visits to the UK from Italy were up 1% on the first six months of last year at 841,000. Spending was also up by 2% to £339 million – though neither were enough to claim a record spot from the strong first six months of 2016.
- **GCC combined:** visits from these combined countries were up 2% on the start of 2017 to a record 324,000 – posting new Q1 and Q2 visit records. Spending, however fell 10% to £615 million compared to the visitor spending in the first six months of 2017. (*GCC combined includes: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates*)
  - **UAE** – in the first six months of 2018, there were a record 153,000 visits to the UK from the UAE (up 13% on the start of 2017) who spent £201 million, 4% more than they did in the same period last year.



# 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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# Quarterly Inbound Update

## Q2 2018

11<sup>th</sup> October 2018