Inbound Tourism Trends Quarterly Quarter 3 2018

Issue 26

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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 (October – December 2018) is scheduled for later 2019. This will provide data on visits by markets and UK region visited for all of 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 are up by an estimated 5.6% in 2018 so far*.

Europe has seen similar growth to the global average, with visits up 5.7%. Within this, Western Europe was up 6%, Southern Europe 7%, Eastern Europe 6% and Northern Europe (which includes UK – there is significant variation in growth within this region) 0%.

Globally, the fastest growth in visits in 2018 data so far has been in Middle East, where arrivals are up 10.3%. Visits to the Americas were up by the weakest rate, 2.9%.

Continents	International tourist arrivals to region 2017 (millions)	% growth in 2018 to date (estimated)
World	**1,326**	**5.6%**
Europe	**672**	**5.7%**
Asia Pacific	**323**	**6.1%**
Americas	**211**	**2.9%**
Africa	**63**	**7.3%**
Middle East	**58**	**10.3%**

Source: UNWTO

*2018 figures are provisional and will be revised with subsequent data. Most markets have reported inbound statistics for the first three quarters of the year.

Economic outlook

- Eurozone: a weak second half of the year, especially in Germany and Italy, drove a more modest outturn in 2018 than in 2017. 2019 is expected to see slightly higher growth in consumer spending, aided by a easing of inflation. There are market variations in prospects, with France and Germany forecast to see higher spending growth in 2019 than in 2018 but the opposite for Netherlands, Ireland and Spain.
- USA: despite Wall Street volatility and the partial government shutdown, economic fundamentals continue to drive a good rate of growth with the labour market strong. However, growth for 2020 and beyond is forecast to be significantly slower.
- China: although the trade war is a source of downwards pressure, the outlook is still for spending growth over 6%.
- The oil price plunged from a high of $86 in October to around $50 at year end, before partially recovering to $61 by late January. The lower oil price should ease inflationary pressures although, along with falls in equities, also reflects fears about demand.

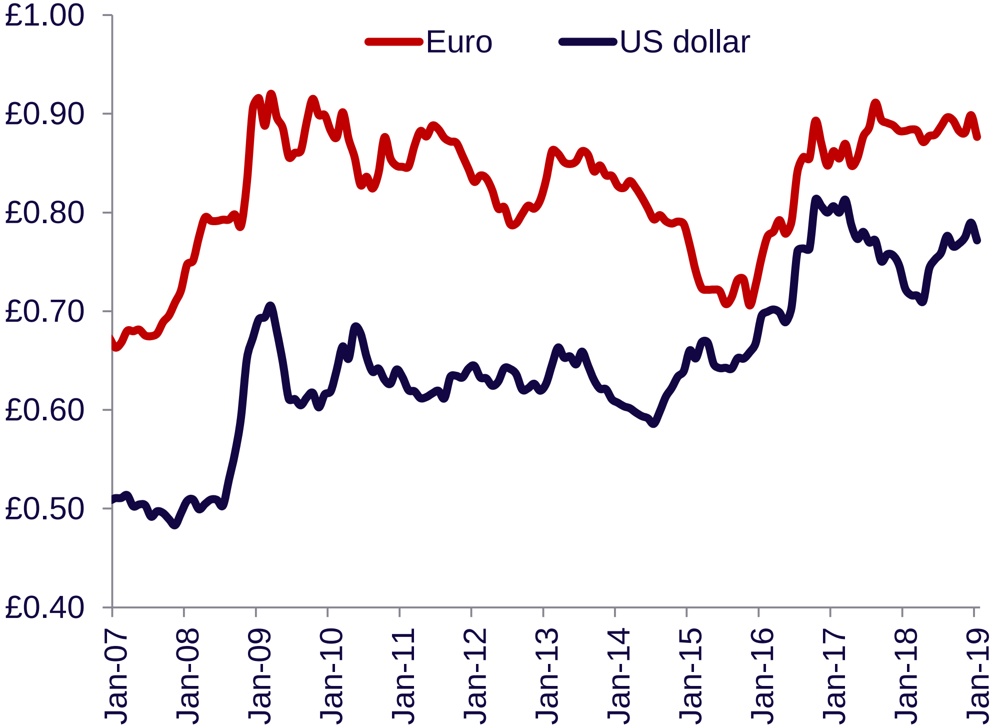
Consumer spending growth	2018	2019	2020
Australia	2.6%	2.4%	2.7%
Canada	2.2%	1.6%	1.6%
Denmark	2.5%	2.7%	2.9%
France	0.8%	1.4%	1.3%
Germany	1.2%	2.0%	1.9%
Ireland	2.6%	2.0%	2.8%
Italy	0.6%	0.4%	0.7%
Japan	0.5%	1.2%	-0.2%
Netherlands	2.7%	1.5%	1.5%
Norway	2.1%	2.6%	2.2%
Poland	4.5%	4.2%	3.5%
Spain	2.4%	2.0%	1.8%
Sweden	1.6%	2.3%	2.1%
Switzerland	1.0%	1.6%	1.5%
UK	1.7%	1.5%	1.8%
USA	2.7%	2.8%	2.0%
Brazil	1.9%	2.2%	2.9%
China	6.9%	6.8%	6.5%
India	7.4%	7.7%	7.0%
Russia	2.2%	1.0%	1.9%
Saudi Arabia	3.0%	2.5%	2.5%
South Africa	1.6%	2.2%	2.3%

Source: Oxford Economics

Exchange rate

- Post the EU referendum, the pound fell sharply; it has fluctuated since then but remains well below its pre-referendum level.
- After falling to a low of €1.10 and $1.25 in December, the pound stands at €1.14 and $1.30 as of late January 2019 – very similar to its level one year before against the Euro, although 7% weaker against the US dollar.

Value of US dollar and euro against pound. Monthly averages to January 22nd



Source: Bank of England

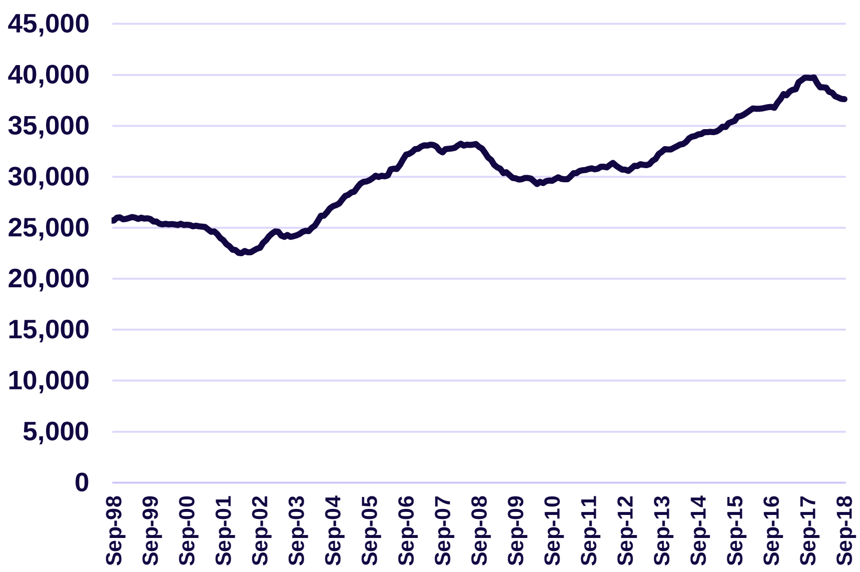
Visits and value trends by journey purpose, transport mode and area visited

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 **10.8 million visits** to the UK in Q3 2018 – this was down 3% compared to Q3 2017 although still the second highest Q3 ever recorded (Q3 2017 is the highest).
- The figures for the year to date (January to September) are 5% down on the same period of 2017.
- In the rolling 12 months to September 2018, there were 37.6 million inbound visits, 5% down on the previous 12 month period.
- The latest provisional data for September, our latest monthly results, show visits down 2% compared to September 2017.

Inbound visits (000s), rolling year ending



	Visits (000s)	Growth
Q3 2018*	10,806	-3%
Year to date* (Jan – Sept 2018)	28,680	-5%
Latest monthly* (September 2018)	3,055	-2%
Rolling 12 months* (Oct 2017 – Sep 2018)	37,600	-5%

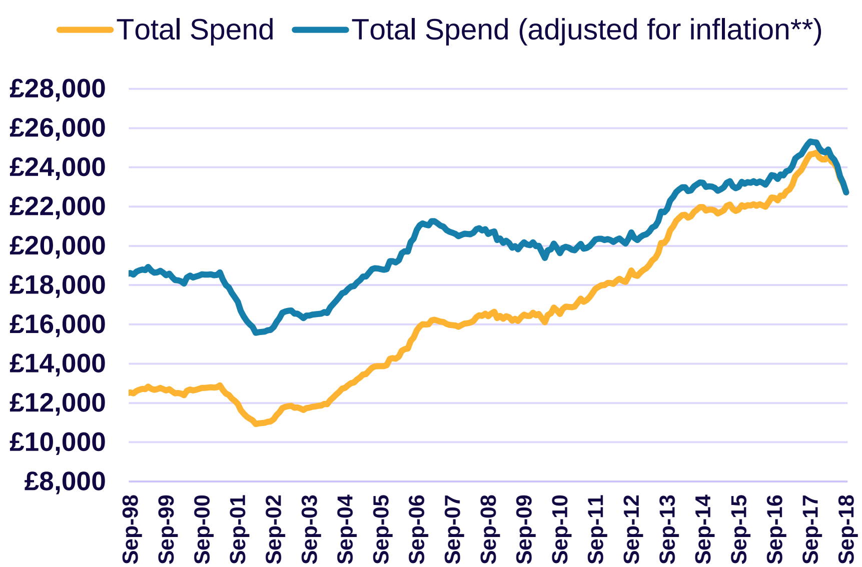
Source: International Passenger Survey

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

Inbound value

- Inbound visitor spending was also down in Q3 2018 compared to the record holding Q3 2017. Visitors **spent £7.2 billion** in the UK during Q3 2018, down 15%.
- So far 2018 spend is tracking 9% lower, compared to the first nine months of 2017 at £17.5 billion.
- Inbound visitor spending in the 12 months to September 2018 has reached £22.7 billion, down 8% compared to the previous 12 month period.
- The latest provisional data for September, our latest monthly results, show spend down 19% compared to September 2017.

Inbound spend (£m), rolling year ending



	Spend (£m) Nominal terms	Growth
Q3 2018*	£7,175	-15%
Year to date* (Jan – Sep 2018)	£17,464	-9%
Latest monthly* (September 2018)	£1,973	-19%
Rolling 12 months* (Oct 2017 – Sep 2018)	£22,717	-8%

Source: International Passenger Survey

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

Journey purpose trends

There were a new Q3 record of 4.8 million **holiday** visits in Q3 2018 although spend fell 9% to £3.8 billion compared to the record set in Q3 2017. Strong 2017 results put both visits and spend down 5%, in the rolling 12 months to September 2018 – compared to the previous 12 months.

Journeys to **visit friends or relatives (VFR)** fell by 11% to 3.1 million. VFR spending fell 19% from Q3 2017 to £1.6 billion. Both of these declines are compared to the record holding Q3 2017. In the 12 months to September 2018 VFR visits and spend are down 3% and 4% respectively, compared to the previous rolling twelve month period.

Business visits were up 6% compared to Q3 2017 at 2.0 million. Business visit spend of £1.1 billion was 10% lower than Q3 2017.

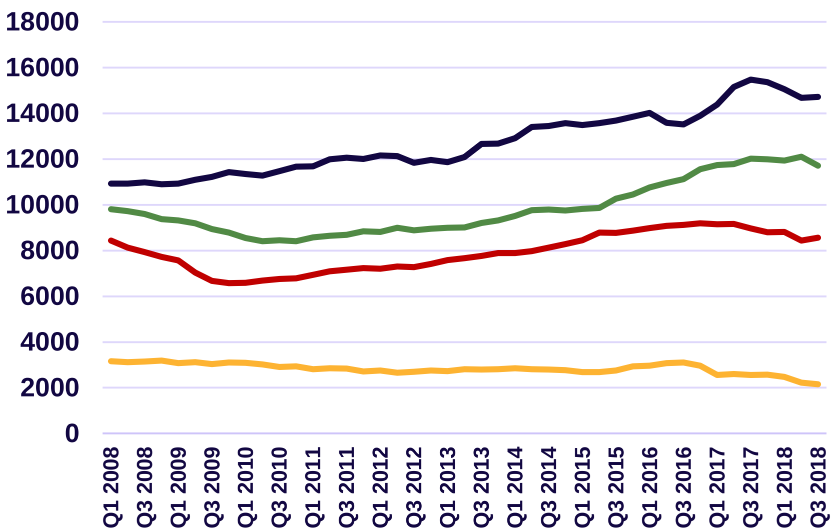
% change in visits
Oct 17 – Sept 18 v Oct 16 – Sept 17

-5%	-5%	-3%	-15%

% change in spend
Oct 17 – Sept 18 v Oct 15 – Sept 16

-5%	-11%	-4%	-23%
Holiday	Business	VFR	Misc.

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



	Year to date (Jan – Sept 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Holiday	11,675	£8,135	14,720	£10,055
Business	6,359	£3,402	8,560	£4,814
VFR	8,747	£4,215	11,705	£5,534
Misc.	1,898	£1,671	2,614	£2,261

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

Transport mode

Travel via **air** accounts for the majority of inbound visits to the UK. Visits by this main mode fell 4% in Q3 2018, compared to Q3 2017. Spending by those travelling by air was down by a larger 16% in Q3 2018 to £6.1 billion. Over the longer term rolling 12 months to September 2018 visits fell 5%, but spending was up 2% compared to the previous 12 month period.

Visits to the UK via the **tunnel** rose 5% in Q3 2018 to 1 million. Spending was also up, by 5%, to £505 million. In the 12 months to June 2018, tunnel visits were down 8% but spend was up 2% on the previous 12 months.

Visits to the UK departing via the **sea** were on par with Q3 2017. However spending was down 8%. Both visits and spend are down in the rolling 12 months to September 2018.

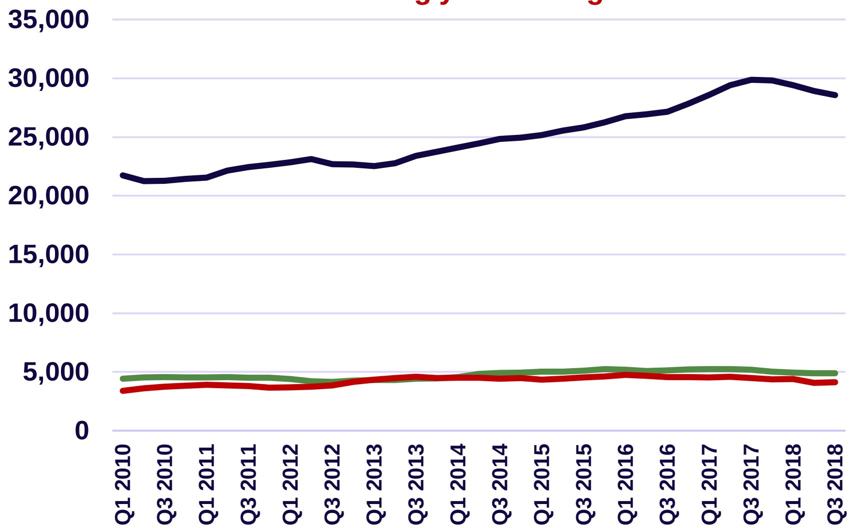
% change in visits
Oct 17 – Sept 18 v Oct 16 – Sept 17

Air	Tunnel	Sea
-5%	-8%	-6%

% change in spend
Oct 17 – Sept 18 v Oct 16 – Sept 17

Air	Tunnel	Sea
-9%	2%	-4%

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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Air	21,693	£14,928	28,571	£19,567
Tunnel	3,109	£1,276	4,131	£1,656
Sea	3,878	£1,260	4,898	£1,495

Source: International Passenger Survey

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

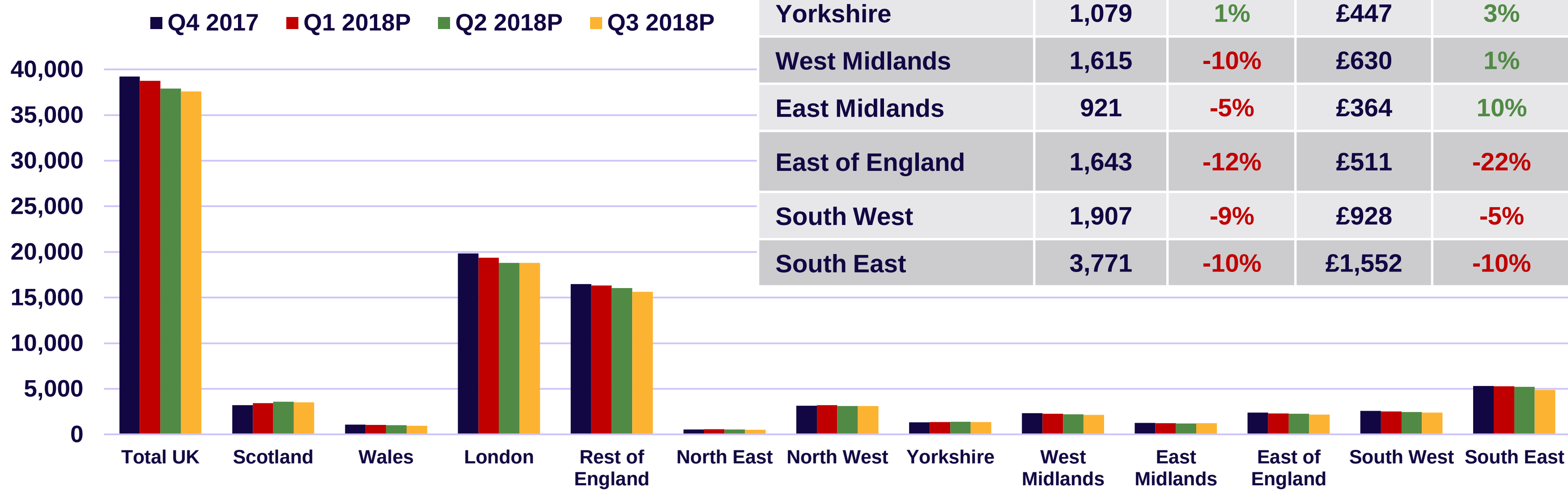
Area visited

The overall declines at the UK level, in both visits and spend, can be seen throughout the UK's nations and regions. The only region to report growth in both visits and spend, compared to the first nine months of 2017 is **Yorkshire**.

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

Year to date (Jan – Sep 18*)	Visits (000s)	Growth	Spend (£ mill)	Growth
Total UK	28,680	-5%	£17,464	-9%
Scotland	2,904	13%	£1,857	-2%
Wales	784	-13%	£320	-1%
London	14,215	-7%	£9,182	-13%
Rest of England	11,945	-7%	£5,732	-7%
North East	373	-13%	£253	33%
North West	2,368	-1%	£1,035	-14%
Yorkshire	1,079	1%	£447	3%
West Midlands	1,615	-10%	£630	1%
East Midlands	921	-5%	£364	10%
East of England	1,643	-12%	£511	-22%
South West	1,907	-9%	£928	-5%
South East	3,771	-10%	£1,552	-10%

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.

VisitBritain

Latest quarterly data: selected markets

Country of residence	Visits (000)				Spend (£m)			
	Q3 2017	Q3 2018P	Growth	New record	Q3 2017	Q3 2018P	Growth	New record
Australia	432	369	*-15%*		£469	£371	*-21%*	
Belgium	296	296	*0%*		£112	£85	*-24%*	
Brazil*	64	62	*-3%*		£69	£83	*21%*	
Canada	282	305	*8%*		£206	£252	*22%*	yes
China	160	160	*0%*	=	£340	£270	*-20%*	
Denmark	179	164	*-9%*		£96	£93	*-4%*	
Finland*	88	60	*-32%*		£42	£33	*-21%*	
France	873	849	*-3%*		£338	£395	*17%*	
Germany	1,047	945	*-10%*		£557	£451	*-19%*	
Hong Kong	78	71	*-9%*		£111	£90	*-19%*	
India	163	175	*7%*	yes	£135	£171	*26%*	
Irish Republic	786	808	*3%*		£264	£238	*-10%*	
Italy	500	510	*2%*		£256	£259	*1%*	
Japan	80	80	*-1%*		£99	£77	*-23%*	
Netherlands	587	525	*-11%*		£246	£204	*-17%*	
Norway	173	174	*1%*		£88	£107	*22%*	
Poland	487	442	*-9%*		£116	£138	*19%*	
Portugal*	106	95	*-11%*		£49	£39	*-21%*	
Romania	227	241	*6%*	yes	£58	£130	*124%*	yes
Spain	641	668	*4%*	yes	£319	£323	*1%*	
Sweden	215	255	*19%*	yes	£120	£135	*12%*	yes
Switzerland	232	209	*-10%*		£173	£105	*-39%*	
United Arab Emirates	166	133	*-20%*		£309	£286	*-8%*	
USA	1,221	1,329	*9%*	yes	£1,158	£1,081	*-7%*	

*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 to the UK from **Belgium** were in line with Q3 2017, while spending dropped 24% compared to record Q3 of 2017.

There were 849,000 visits from **France** to the UK, 3% fewer than in Q3 2017. Spending was actually up in Q3 2018 (17%), compared to Q3 2017, to £395 million. These positive spend results offset the declines seen in Q1 and Q2, with French visitot spending up 3% on the first nine months of 2017.

Irish Republic visits grew in Q3 2018, up 3% to 808,000. Visitor spending from the Irish Republic fell in Q3 2018, down 10% compared to Q3 2017, at £238 million – the fourth consecutive quarter of spending decline.

During Q3 2018 visits from the **Netherlands** were down 11% while spending was down 17% compared to the records set in Q3 2017.

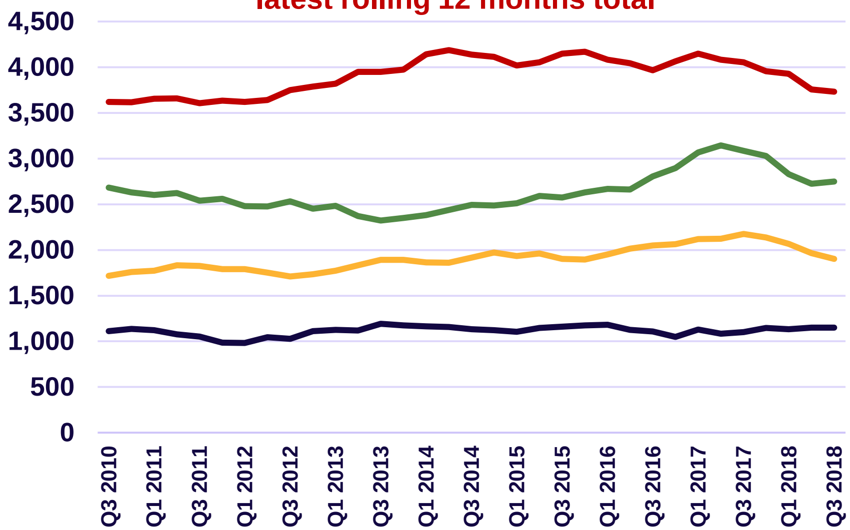
% change in visits
Oct 17-Sept 18 v Oct 16-Sept 17

Belgium	France	Irish Rep	Netherlands
4%	-8%	-11%	-13%

% change in spend
Oct 17-Sept 18 v Oct 16-Sept 17

Belgium	France	Irish Rep	Netherlands
1%	8%	-17%	-15%

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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Belgium	869	£298	1,150	£385
France	2,796	£1,076	3,733	£1,456
Irish Republic	2,060	£672	2,748	£883
Netherlands	1,427	£528	1,904	£667

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 down 12% in Q3 2018. Spending nearly halved in Q3 2018 compared to Q3 2017 (-48%). The first nine months of 2018 has seen visits from Austria to the UK dip 4%, whilst spend was down 33%.

After a record twelve months to September 2017, visits from **Germany** were down 4% and spend was down 7% in the twelve months rolling to September 2018.

Visits and spend from **Switzerland** decreased in Q3, down 10% and 39% respectively. Similarly, over the longer term period of the rolling twelve months to September 2018, visits and spend were both down.

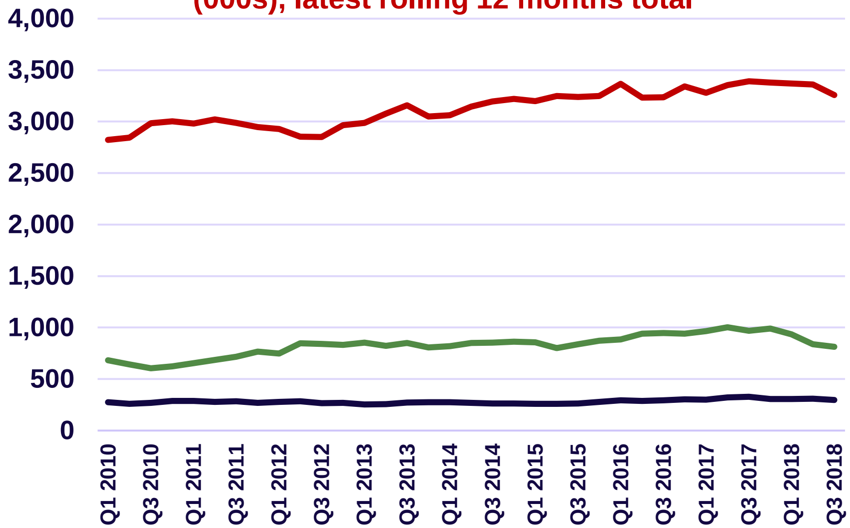
% change in visits
Oct 17-Sept 18 v Oct 16-Sept 17

Austria	Germany	Switzerland
-9%	-4%	-16%

% change in spend
Oct 17-Sept 18 v Oct 16-Sept 17

Austria	Germany	Switzerland
-37%	-7%	-26%

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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Austria	238	£105	298	£134
Germany	2,487	£1,133	3,259	£1,448
Switzerland	580	£304	814	£435

Source: International Passenger Survey

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

Southern Europe

Spend and visits from **Greece** both fell in Q3 2018. In the first nine months of 2018 visits were down (3%) on the start of 2017 and spend was down by 23%.

Visits and spend from **Italy** rose marginally in Q3 2018. Over the longer term 12 months to September, spend increased by 5% but visits are trailing behind the levels measured in the previous twelve month period.

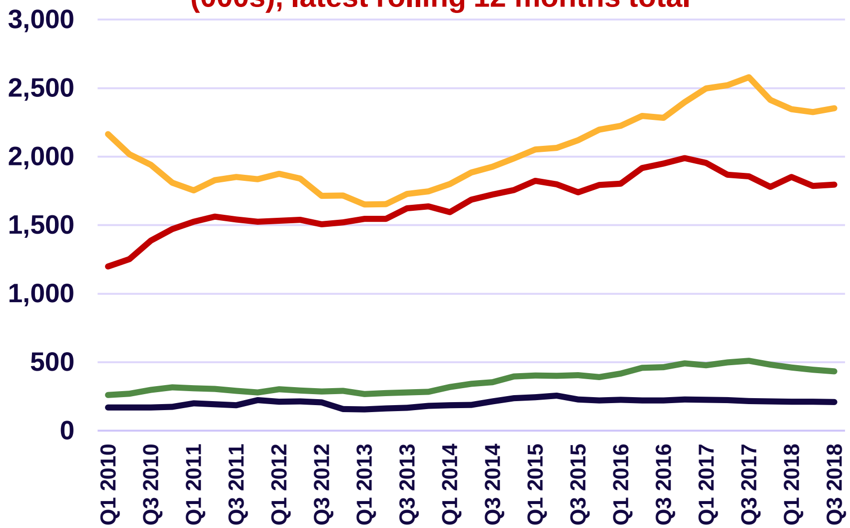
It was a weak Q3 for **Portugal** that saw both visits and spend fall. **Spain** saw a record Q3, as the UK welcomed 668,000 visits whilst spend rose by a marginal 1%. For both countries, over the first nine months and the longer term rolling twelve months to September 2018 both visits and spend are lower than the previous years.

% change in visits
Oct 17-Sept 18 v Oct 16-Sept 17

% change in spend
Oct 17-Sept 18 v Oct 16-Sept 17

	Greece	Italy	Portugal	Spain
% change in visits	-4%	-3%	-15%	-9%
% change in spend	-14%	5%	-14%	-9%

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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Greece	139	£71	209	£120
Italy	1,351	£598	1,796	£849
Portugal	322	£125	433	£181
Spain	1,837	£802	2,352	£1,003

Source: International Passenger Survey

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

Nordics

Visits and spend from **Denmark** both declined in Q3 2018 compared to Q3 2017. Visits for **Finland** declined in Q3 2018, as did spend. In the longer term twelve months rolling to September 2018, visits and spend were both down by 15%.

Q3 saw visits and spend from **Norway** rise. It is the only Nordic market to report longer term (rolling twelve months to September 2018) increases in visits and spend.

Sweden set a record Q3 for visits and spend, as the UK welcomed 255,000 visits and spend of £135 million. For the first nine months of 2018, visits are down by 1% and spend is up by 4%, compared to the previous year.

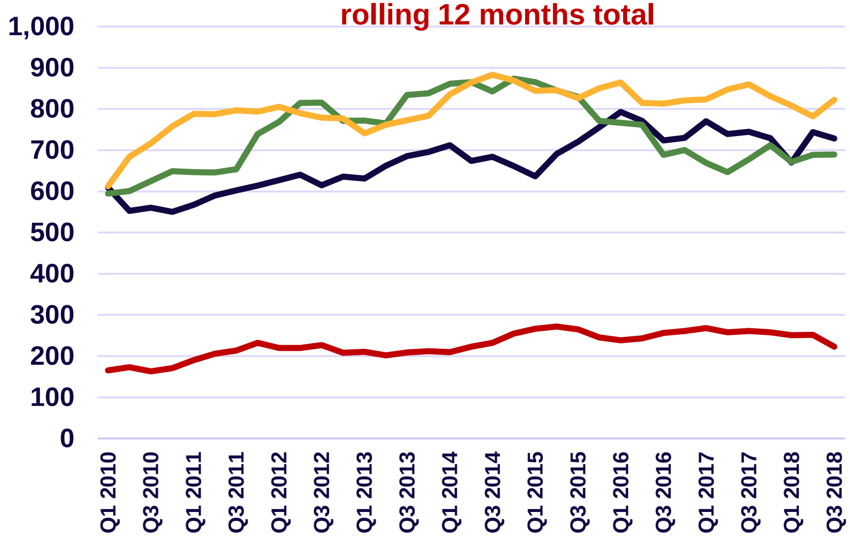
% change in visits
Oct 17-Sept 18 v Oct 16-Sept 17

Denmark	Finland	Norway	Sweden
-3%	-15%	1%	-5%

% change in spend
Oct 17-Sept 18 v Oct 16-Sept 17

Denmark	Finland	Norway	Sweden
-1%	-15%	14%	-7%

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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Denmark	546	£274	728	£372
Finland	168	£87	223	£113
Norway	466	£283	690	£410
Sweden	625	£361	822	£465

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 the **Czech Republic** declined in Q3 2018. Both visits and spend are down over the longer term rolling twelve months to September 2018.

It was a record Q3 for **Hungary** as the UK welcomed 146,000 visits from July to September 2018. In the first nine months of 2018, visits were up 1% and spend was down 2% compared to 2017. Visits from **Poland** fell in Q3 2018, whilst visits rose 19%. Both were up on the first nine months of 2017.

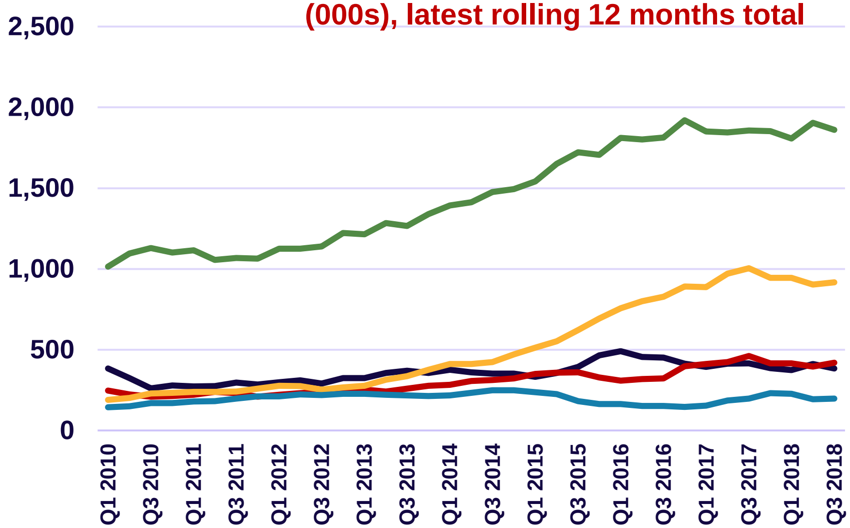
Visits from **Romania** rose 6% in Q3, whilst spend increased by 124% (a new record for Q3) generating £130m. Visits from **Russia** increased by 7% Q3 whilst spend decreased by 19%. Over the longer term rolling twelve months to September 2018, Russians spent £169m in the UK, up 2%.

% change in visits
Oct 17-Sept 18 v Oct 16-Sept 17

% change in spend
Oct 17-Sept 18 v Oct 16-Sept 17

	Czech Rep	Hungary	Poland	Romania	Russia
% change in visits	-8%	-9%	0%	-9%	-1%
% change in spend	-16%	-1%	13%	46%	2%

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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Czech Rep	317	£88	384	£114
Hungary	333	£108	420	£135
Poland	1,409	£336	1,861	£440
Romania	683	£331	917	£422
Russia	138	£125	197	£169

Source: International Passenger Survey

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

English-speaking long-haul

Australian visits and spend were down in Q3 (15% and 21% respectively). Over the longer term twelve months to September, both visits and spend were also down on the previous year.

Both visits and spend were up in Q3 for **Canada**. A new record was set for the first nine months of 2018, as the UK welcomed 672,000 visits generating £525m (compared to the first nine months of the previous year).

In Q3, visits were up 3% and spend was up 23% (a new Q3 record) from **New Zealand.** Over the twelve months to September 2018, spend increased by 14% whilst visits decreased by 4%.

Visits from **USA** rose 9% to a record 1,329,000 in Q3, but spend fell by 7%. Over the long term rolling 12 months both visits and spend were slightly down.

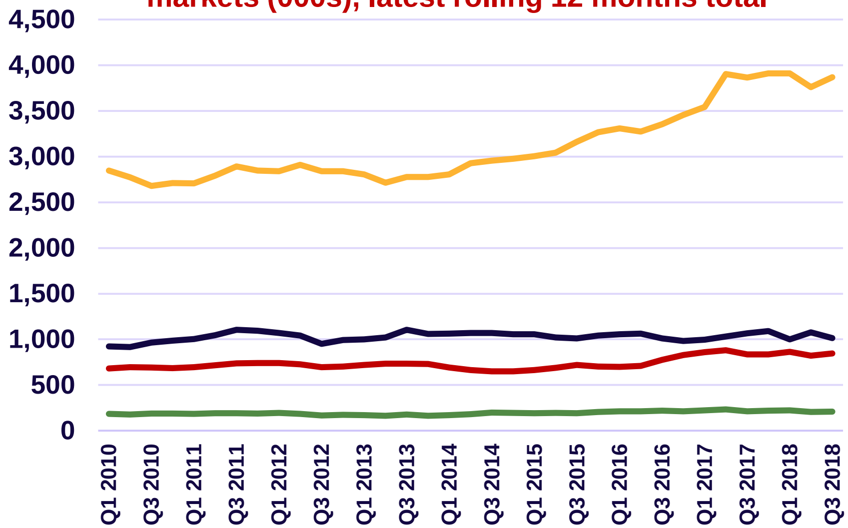
% change in visits
Oct 17-Sept 18 v Oct 16-Sept 17

Australia	Canada	New Zealand	USA
-6%	0%	-4%	-1%

% change in spend
Oct 17-Sept 18 v Oct 16-Sept 17

Australia	Canada	New Zealand	USA
-5%	13%	14%	-9%

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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Australia	811	£889	1,015	£1,114
Canada	672	£525	846	£666
New Zealand	172	£204	208	£236
USA	3,098	£2,721	3,870	£3,440

Source: International Passenger Survey

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

Advanced Asia

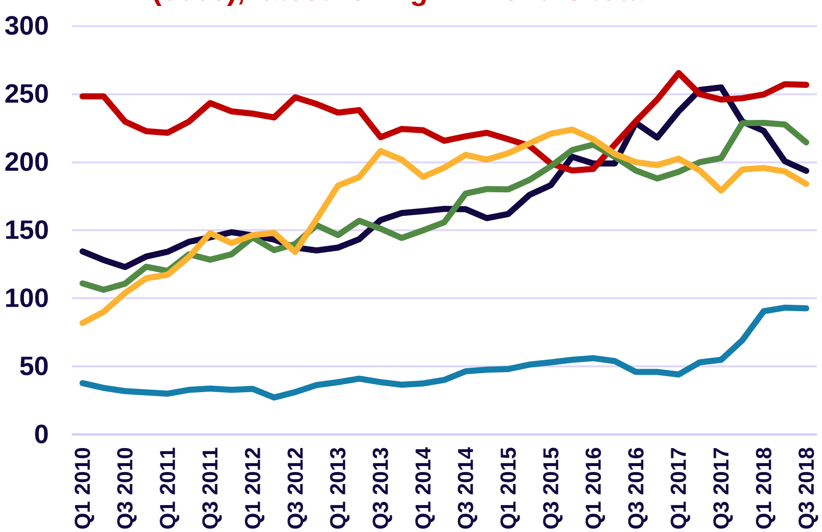
A weak Q3 for **Hong Kong**, with both visits and spend down compared to Q3 2017. In the first nine months of 2018, visits were down 19% and spend was down 32% compared to the previous year. Visits from **Japan** were down 1% in Q3 whilst spend was down 23%. However, visits and spend were up on over the longer term rolling twelve months to September. Q3 saw a significant drop in visits (-23%) and spend from **Singapore** (-44%). Visits from **South Korea** fell by 2% in the rolling twelve months to September 2018 and spend fell by 25%. **Taiwan** results can be more volatile due to sample sizes. In the first nine months of 2018, visits are up 67% and spend is up 59%, fuelled by a strong first half of the year.

% change in visits
Oct 17-Sept 18 v Oct 16-Sept 17

% change in spend
Oct 17-Sept 18 v Oct 16-Sept 17

	Hong Kong	Japan	Singapore	S. Korea	Taiwan
% change in visits	-15%	3%	5%	2%	67%
% change in spend	-29%	21%	-9%	-25%	59%

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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Hong Kong	155	£174	194	£216
Japan	199	£238	257	£290
Singapore	139	£180	215	£236
South Korea	136	£109	184	£139
Taiwan**	70	£73	93	£89

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

Visits from **China** were at a record high in Q3 as the UK welcomed 160,000 visits, whilst spend was down 20%. Over the 12 rolling months to September 2018 and first nine months of 2018, visits were at record levels.

India saw a record Q3 as the UK welcomed 175,000 visits. However, in the past twelve months to September 2018, visits and spend were down by 2% and 5% respectively.

Visits and spend from **Malaysia** were both down in Q3 2018. It was a weak first nine months of 2018 with visits down 24% and spend down 56% compared to 2017. **Thailand** is a smaller inbound market and visits numbers are volatile. It had a record first nine months of 2018 welcoming 74,000 visits and £122m spend.

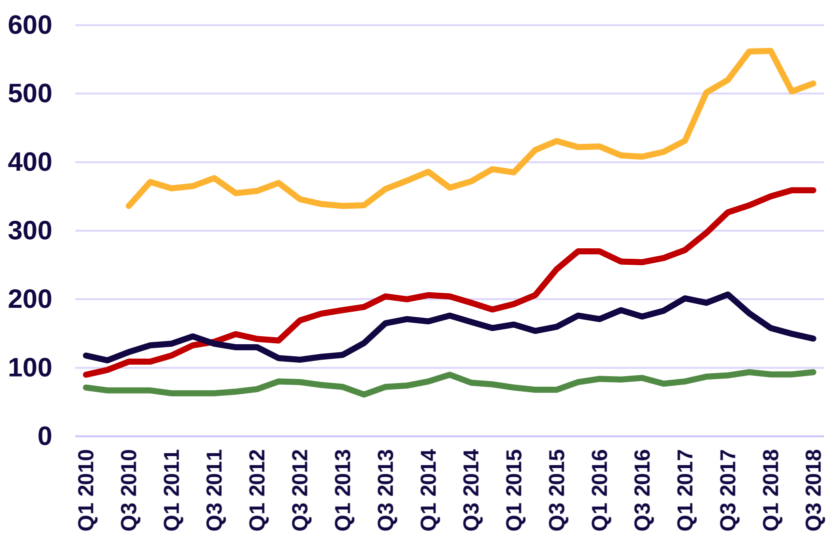
% change in visits
Oct 17-Sept 18 v Oct 16-Sept 17

China	India	Malaysia	Thailand
7%	-2%	-32%	4%

% change in spend
Oct 17-Sept 18 v Oct 16-Sept 17

China	India	Malaysia	Thailand
-15%	-5%	-43%	28%

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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
China	297	£478	359	£602
India	397	£347	515	£439
Malaysia	114	£128	143	£157
Thailand**	74	£122	94	£143

Source: International Passenger Survey

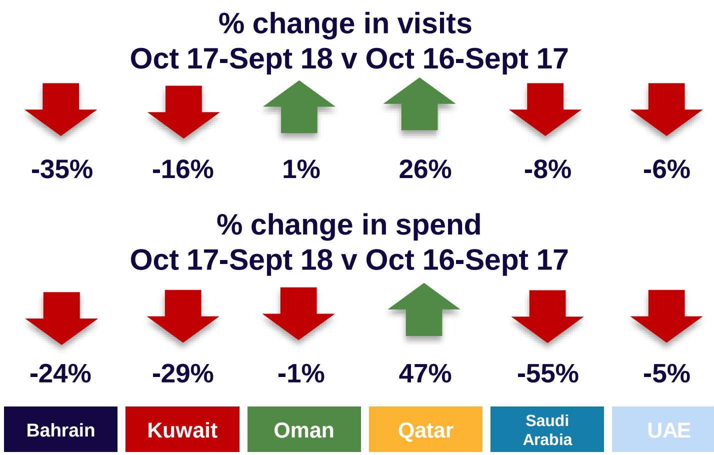
*2018 figures are provisional and will be revised with the next quarterly and annual releases

**Sample size less than n=100

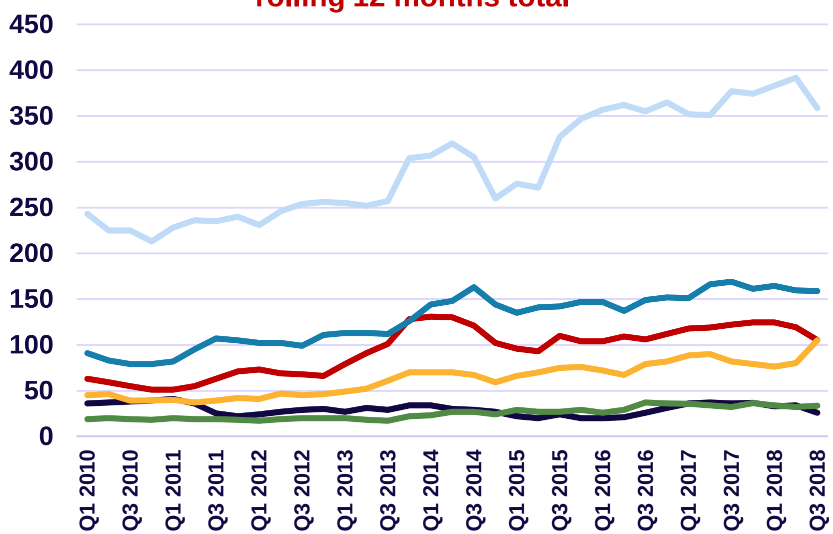
The Gulf

Visits and spend from the **UAE** and **Saudi Arabia** were down in Q3 and in the rolling twelve months to September 2018 – for both, spending was strong in the previous year.

Kuwait saw visits to the UK decrease by 30% in Q3 2018, whilst spend was down by more than 50%. In the twelve rolling months to September 2018 both visits and spend decreased. **Qatar** was the only Gulf state to show an increase in spend and visits to the UK in the past twelve months. **Oman** and **Bahrain** visitor numbers remain lower. Over the longer term rolling twelve rolling months, **Oman** has seen marginal change with visits up 1% and spend down 1% whilst Bahrain has seen more significant decreases in visits and spend (35% and 24% respectively).



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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Bahrain**	21	£68	26	£81
Kuwait	84	£206	105	£266
Oman**	56	£34	34	£56
Qatar	92	£187	105	£242
Saudi Arabia	139	£365	159	£402
UAE	285	£487	359	£603

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

Rest of Middle East & Africa

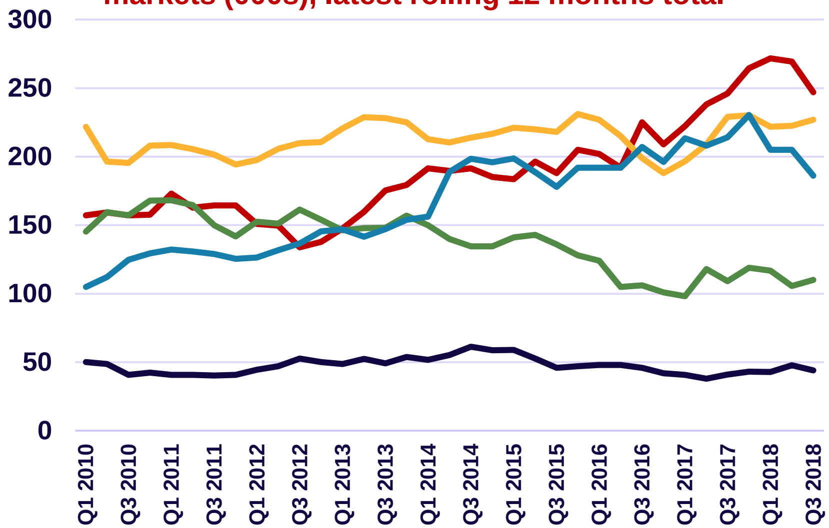
Nigeria visits remained stable in the 12 rolling months to September 2018; spend was down 22% compared to the previous rolling 12 month period.

South Africa had a record Q3 for both visits and spend as the UK welcomed 90,000 visits, generating £95m. Over the longer term rolling twelve months to September 2018, spend was up 17%, and visits were marginally down by 2%.

In the first nine months of 2018, visits and spend from **Israel** were down 9% and 31% respectively. **Turkey** visits for the same period were also down 26%, whilst spend was down 6%. **Egypt** saw a weak Q3 with visits down by 27% and spend down by 52% compared to Q3 2017. Over the past twelve months, visits were up by 4% whilst spend was down by 59%.

	Egypt	Israel	Nigeria	S. Africa	Turkey
% change in visits Oct 17-Sept 18 v Oct 16-Sept 17	4%	-1%	0%	-2%	-14%
% change in spend Oct 17-Sept 18 v Oct 16-Sept 17	-59%	-19%	-22%	17%	-3%

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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Egypt**	33	£34	44	£45
Israel	187	£139	247	£190
Nigeria**	81	£109	110	£155
South Africa	184	£219	227	£282
Turkey**	128	£112	186	£148

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

Latin America

Visits from **Brazil** declined by 3% in Q3, whilst spend increased by 21%. Over the 12 months to September 2018, spend and visits were both down by 4%.

Following a strong first half of 2018, Q3 saw decreases in visits and spend from **Argentina.** Over the past twelve months to September 2018, visits were down 12% whilst spend was down 16%.

Whilst visits and spend in Q3 2018 were down on Q3 2017, **Mexico** was the only Latin American country to show increases in both visits and spend over the longer term rolling twelve months to September. The UK welcomed 160,000 visits, generating £96m spend.

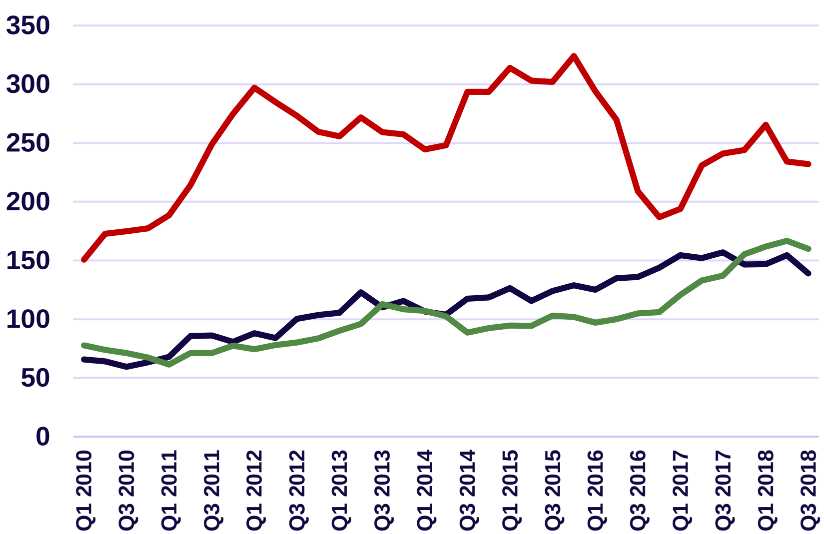
% change in visits
Oct 17-Sept 18 v Oct 16-Sept 17

Argentina	Brazil	Mexico
-12%	-4%	16%

% change in spend
Oct 17-Sept 18 v Oct 16-Sept 17

Argentina	Brazil	Mexico
-16%	-4%	7%

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



	Year to date (Jan – Sep 18*)		Rolling 12 months (Oct 17 – Sept 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Argentina**	122	£138	139	£151
Brazil	188	£184	232	£236
Mexico**	123	£69	160	£96

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

January 2019