

Monthly Inbound Update October 2018

22nd February 2019

Contents

- 1. About this data**
- 2. Headlines**
- 3. Journey Purpose:** October, last 3 months, and provisional 2018 figures by journey purpose
- 4. Global Regions:** October, 3 months ending October, and provisional 2018 figures by global region
- 5. Outbound and Competitors**
- 6. Exchange rates**
- 7. Individual Markets:** Percentage change in visits
- 8. Longer term trends:** Overall trends since 2000, Journey purpose, Global regions
- 9. Detailed monthly trends:** Overall visits and spend, Journey purpose, Global regions
- 10. Definitions and more information**

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 (Q4, October – December 2018), which may contain some revisions, is scheduled to be released with the annual data later in 2019. This will provide data on visits by markets and UK region visited in 2018.

The next Monthly Release, covering data for **November 2018** as well as **December 2018**, will be on **25th March 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 around 3,000 per month.

Headlines – October 2018 (provisional)

| | OCTOBER 2018 | | LAST 3 MONTHS (AUG - OCT) | | YEAR TO DATE (JAN - OCT 2018) | | ROLLING 12 MONTHS (NOV 2017 - OCT 2018) | |
|--------------------------|--------------|-----------------------------|------------------------------|--------------------------------------|----------------------------------|----------------------------------|--|--------------------------------------|
| | | % change vs. Oct 2017 | | % change vs. Aug '17 - Oct '17 | | % change vs. Jan - Oct '17 | | % change vs. Nov '16 - Oct '17 |
| ALL VISITS (000) | 3,330 | 4% | 10,230 | 0% | 32,010 | -4% | 37,730 | -5% |
| Spend (£ million) | 1,970 | 3% | 6,700 | -9% | 19,430 | -8% | 22,770 | -8% |

- Visits:** The UK welcomed 3.3 million overseas visits in October, up 4% compared to October 2017. It is the first time 2018 monthly results were up on the same month in 2017. There were 10.2 million inbound visits to the UK between August and October 2018, on par with the same period in 2017. However, overseas visits between January and October 2018, as well as between November 2017 and October 2018, were tracking behind January – October 2017 (-4%) and November 2016 – October 2017 (-5%) respectively.
- Spending:** In October 2018 visitor spending increased by 3% compared to October 2017 to reach £2.0 billion. Between August and October 2018 inbound visitors spent a total of £6.7 billion, down 9% on August – October 2017. Year-to-date results in 2018 compare to a record January – October in 2017, and so spend in the first ten months of 2018 was down 8% on those same months in 2017, as was spend in the twelve months to October 2018 compared to the twelve-month period to October 2017 (the second-best ever twelve-month period on record for overseas visitor spending).
- Spend per visit:** In the last twelve months to October 2018 visitor spending has decreased more rapidly than overseas visits; as a consequence spend per visit in November 2017 – October 2018 was down 3% on November 2016 – October 2017, to £604 spent per visit in the twelve months to October 2018.

Journey Purpose

| By journey purpose | OCTOBER 2018 | | LAST 3 MONTHS (AUG - OCT) | | YEAR TO DATE (JAN - OCT 2018) | | ROLLING 12 MONTHS (NOV 2017 - OCT 2018) | |
|--------------------|--------------|-----------------------|---------------------------|--------------------------------|-------------------------------|----------------------------|---|--------------------------------|
| | Visits (000) | % change vs. Oct 2017 | Visits (000) | % change vs. Aug '17 - Oct '17 | Visits (000) | % change vs. Jan - Oct '17 | Visits (000) | % change vs. Nov '16 - Oct '17 |
| Holiday | 1,240 | 8% | 4,280 | 3% | 12,920 | -4% | 14,810 | -5% |
| VFR | 1,070 | 6% | 3,090 | -6% | 9,820 | -2% | 11,770 | -2% |
| Business | 760 | -7% | 2,130 | 4% | 7,120 | -4% | 8,510 | -4% |
| Miscellaneous | 260 | 12% | 730 | -2% | 2,160 | -16% | 2,640 | -15% |

- **Holiday** visits were up 8% to 1.2 million visits in October 2018, compared to October 2017, a new record, and the second month in a row to show an increase on holiday visits in 2017. Holiday visits in August – October 2018 also set a new record for holiday visits in those months with 4.3 million such visits, up 3% on the same months a year ago. Despite that, holiday visits for the first ten months of 2018 were down: there were 12.9 million inbound holiday visits to the UK in January – October 2018, down 4% on the same period in 2017.
- **Visits to friends and relatives (VFR)** were up 6% year on year to 1.1 million visits in October 2018, also setting a new October record. However, with VFR visits in all previous months since July 2018 down compared to those months in 2017 and mixed results in the first six months of 2018, VFR visits in August – October 2018 were tracking down 6% and those in January – October 2018 down 2% compared to 2017.
- **Business** visits fell by 7% in October 2018 compared to October 2017. However, after two months of year-on-year growth, there were a total of 2.1 million business visits from overseas in August – October 2018, 4% up on 2017. Yet with half of the months in 2018 showing declines on 2017, so far business visits are down 4% on the first ten months of 2017.
- **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 October 2018 there were 12% more visits to the UK for those miscellaneous purposes than in October 2017. However, with growth in only three months of 2018 so far, compared to the same respective months in 2017, visits for miscellaneous purposes in the first ten months of 2018 were tracking 16% behind those visits in January – October 2017.

Global Regions

| By global region | OCTOBER 2018 | | LAST 3 MONTHS (AUG - OCT) | | YEAR TO DATE (JAN - OCT 2018) | | ROLLING 12 MONTHS (NOV 2017 - OCT 2018) | |
|------------------|--------------|-----------------------|---------------------------|--------------------------------|-------------------------------|----------------------------|---|--------------------------------|
| | Visits (000) | % change vs. Oct 2017 | Visits (000) | % change vs. Aug '17 - Oct '17 | Visits (000) | % change vs. Jan - Oct '17 | Visits (000) | % change vs. Nov '16 - Oct '17 |
| EU Total | 2,110 | 2% | 6,360 | -1% | 20,640 | -5% | 24,590 | -5% |
| EU15 | 1,700 | 2% | 5,170 | -1% | 16,610 | -5% | 19,760 | -6% |
| Other EU | 410 | 3% | 1,180 | -1% | 4,030 | -1% | 4,830 | -3% |
| Rest of Europe | 260 | -3% | 650 | -4% | 1,850 | -13% | 2,270 | -9% |
| North America | 470 | 33% | 1,410 | 16% | 4,240 | 2% | 4,830 | 2% |
| Rest of World | 490 | -5% | 1,820 | -6% | 5,270 | -5% | 6,040 | -5% |

- There were 2.1 million visits to the UK from all **EU markets** in October 2018, up 2% on October 2017: those are the first positive monthly results since May 2018, though not a record. However, this was not enough to counterweight the declines in the previous months and visits from all EU markets in August – October 2018 were tracking 1% down on those months a year ago. With 20.6 million visits from the EU, the first ten months in 2018 were down 5% on January – October 2017.
- Visits to the UK from the **EU15** markets only followed a very similar trend. There were 1.7 million visits to the UK in October 2018, up 2% on October 2017. August – October 2018 was 1% behind 2017 levels. Moreover, with 16.6 million visits from the EU15 markets to the UK, the January-October 2018 period was down 5% on the same months in 2017.
- Visits from all **Other EU** markets to the UK in the first ten months of 2018 were 3% up in October 2018, but down 1% in August – October 2018 and in January – October 2018, compared to those same months in 2017 respectively.
- Visits to the UK from the **Rest of Europe** decreased 3% year-on-year in October 2018 to 260,000 visits. Despite a 17% year-on-year increase in visits in September 2018, visits from the Rest of Europe in the first ten months of 2018 were 13% down on January – October 2017, with 6 out of 10 months in 2018 so far showing double-digit decreases compared to 2017.
- There were 470,000 visits from **North America** in October 2018, a third more than in October 2017, and a new record. Visits from North America were also up in the last few months, and a new record was also set for September. Thus, visits from those markets also set a new August – October record, with 1.4 million visits in those months in 2018, up 16% on August – October 2017, and a new January – October record with 4.2 million visits in the first ten months of 2018.
- Compared to very strong results in the second half of 2017, visits from the **'Rest of World' markets** in October 2018 were down 5% on October 2017, and also in the first ten months of 2018 compared to January – October 2017.

Outbound and Competitors

Travel abroad by UK residents

| LAST THREE MONTHS: August – October 2018 | | |
|---|---------|--------------------------------|
| | | % change vs. Aug – Oct 2017 |
| Visits (000) | 23,450 | 0% |
| Spend (£ million) | £15,780 | +4% |

- UK residents took over 23 million visits abroad in the three months to October 2018 – on par with the same period in 2017 – and spent close to £16 billion, up 4% (in nominal terms) on August – October 2017.
- Between August and October 2018, UK residents took 1% more holiday and 10% more business trips abroad than they did during the same time in 2017, but fewer visits to friends and relatives (-5%) and fewer miscellaneous visits (-26%) compared to the same period in 2017.
- Visits by UK residents to Europe overall were down 2% in August – October 2018, compared to the same period the year before. Comparing August – October 2018 to those months in 2017, visits to EU15 countries were on par, while visits to other EU destinations were down 11%. Visits during those months increased by 6% to North America, and by 8% 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, Netherlands, and the Republic of Ireland.
- Figures relate to different time periods so comparisons should be treated with caution.

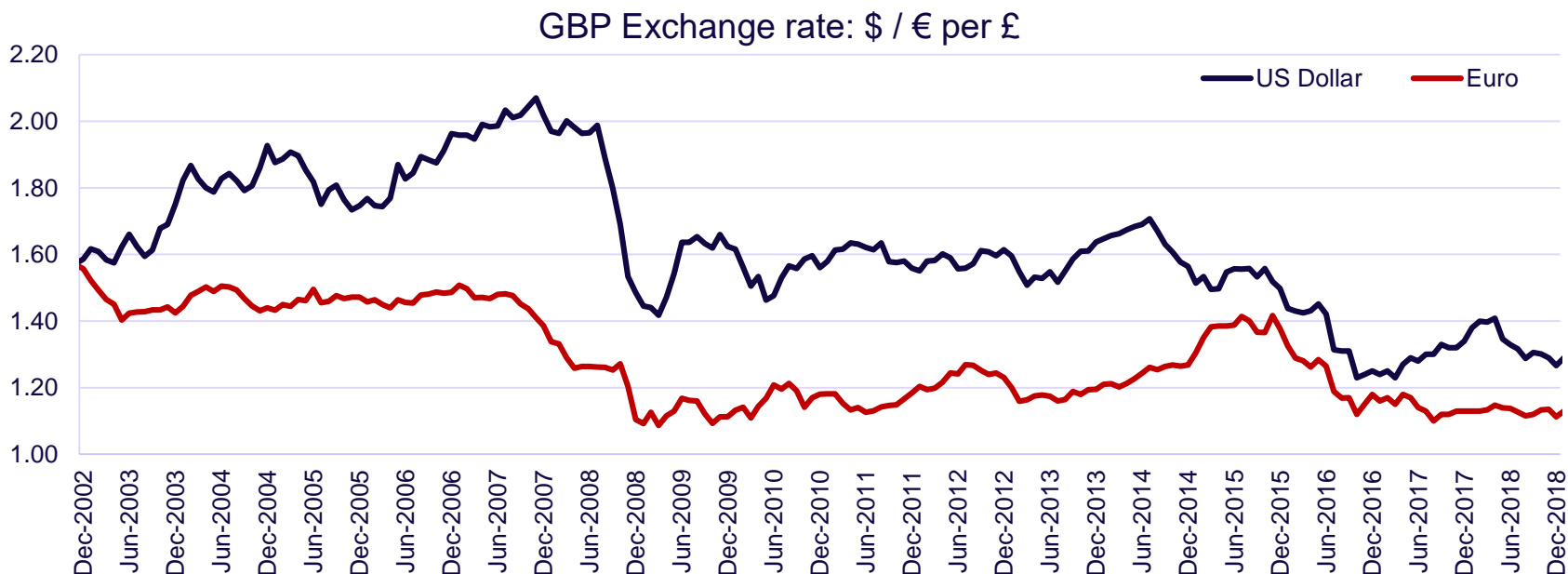
| Destination | Growth in overseas visits | Period (Jan 2018 to ...) |
|-----------------|---------------------------|--------------------------|
| Turkey | 23% | November |
| France | 8% | October |
| USA | 7% | March |
| Rep. of Ireland | 7% | November |
| Netherlands | 7% | October |
| Australia | 5% | October |
| Italy | 5% | September |
| Switzerland | 5% | November |
| Germany | 4% | October |
| Canada | 1% | October |
| Spain | 1% | December |
| UK | -4% | October |

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.

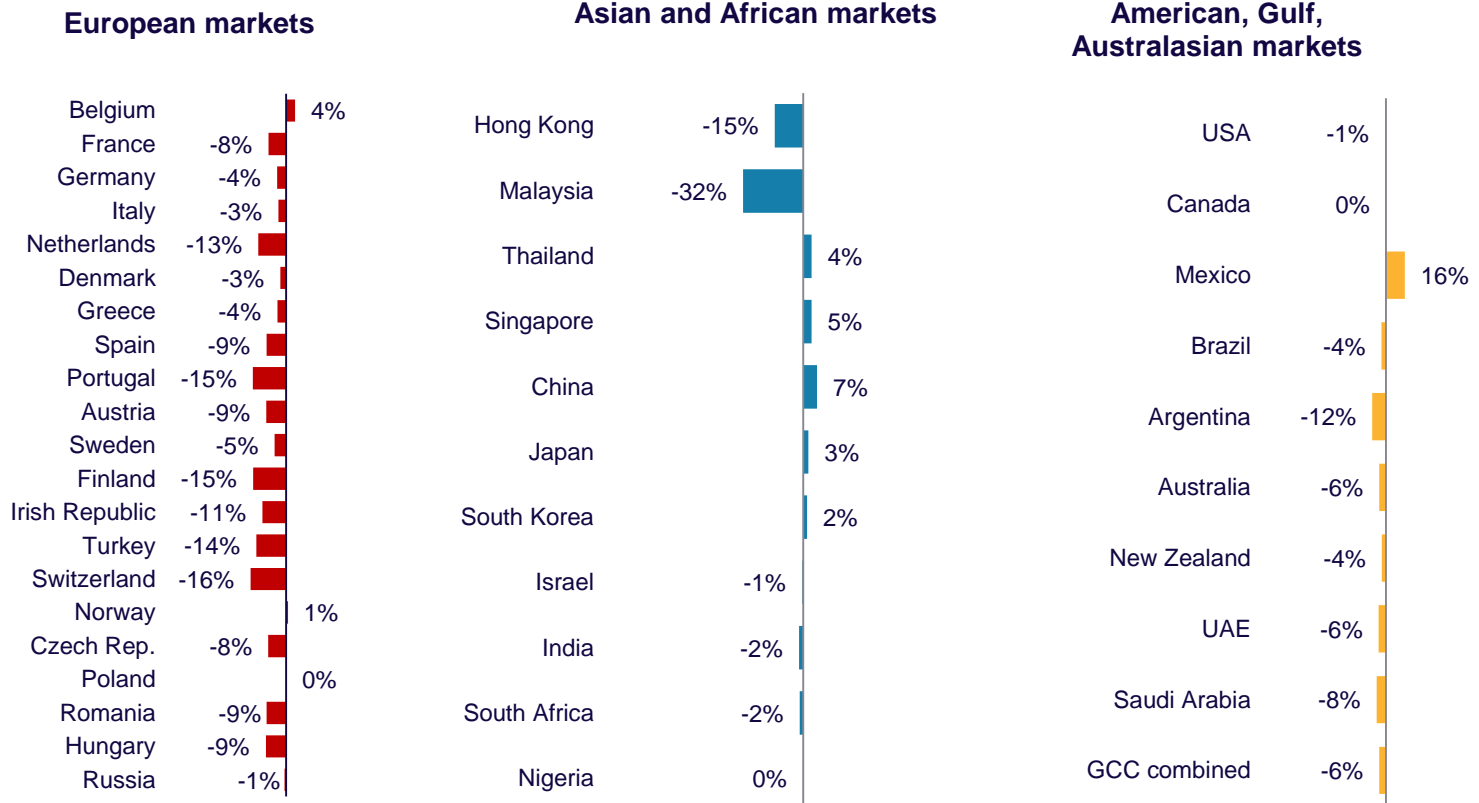
Exchange rates

- 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. 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 1% year on year at \$1.30 in October 2018, and 16% compared to October 2015. Against the euro, in October 2018, at €1.13, Sterling was 1% up compared to its value in October 2017, but 17% down compared to October 2015.
- In October 2018, Sterling was 8% up against the Australian dollar, 2% up against the Canadian dollar and 3% up the Chinese Yuan compared to October 2017; but down 14%, 16% and 8% compared to October 2015 respectively.



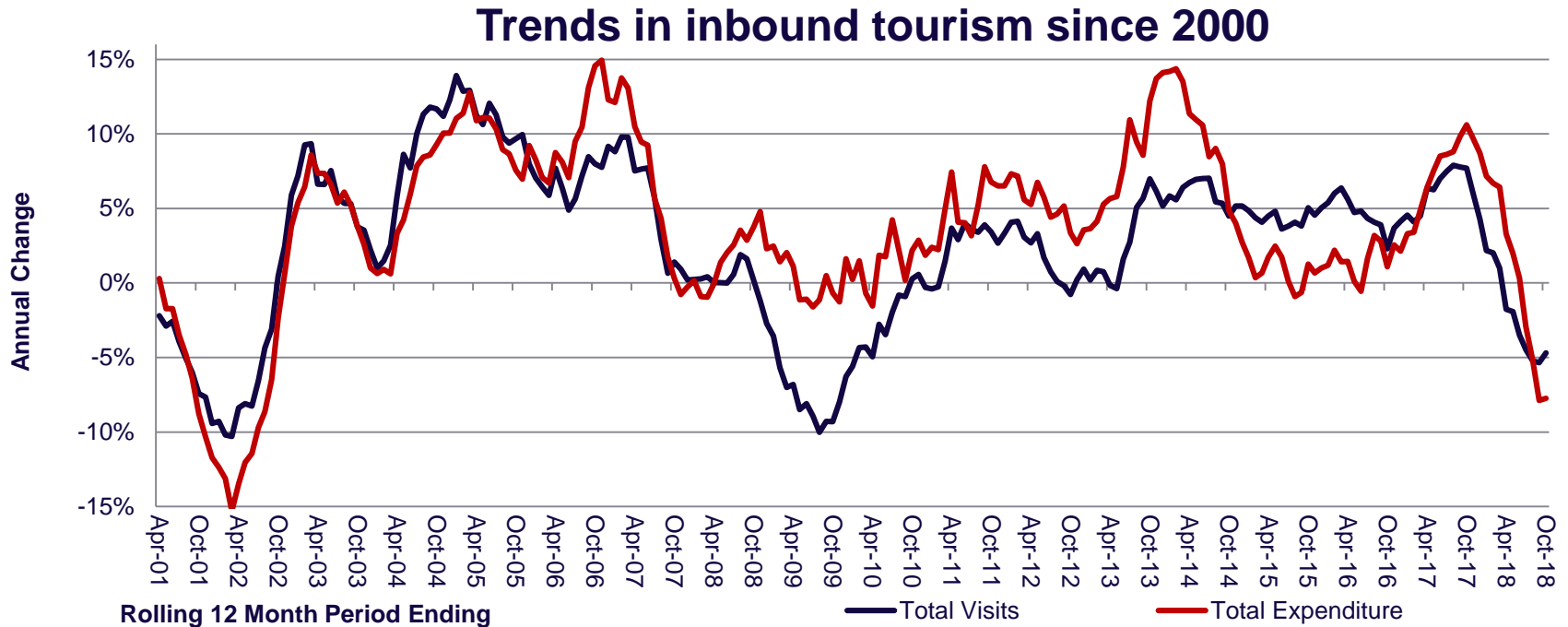
Individual markets – quarterly results

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 **October 2017 – September 2018 v October 2016 – September 2017**).



Longer term trends

Visits and spend since 2001



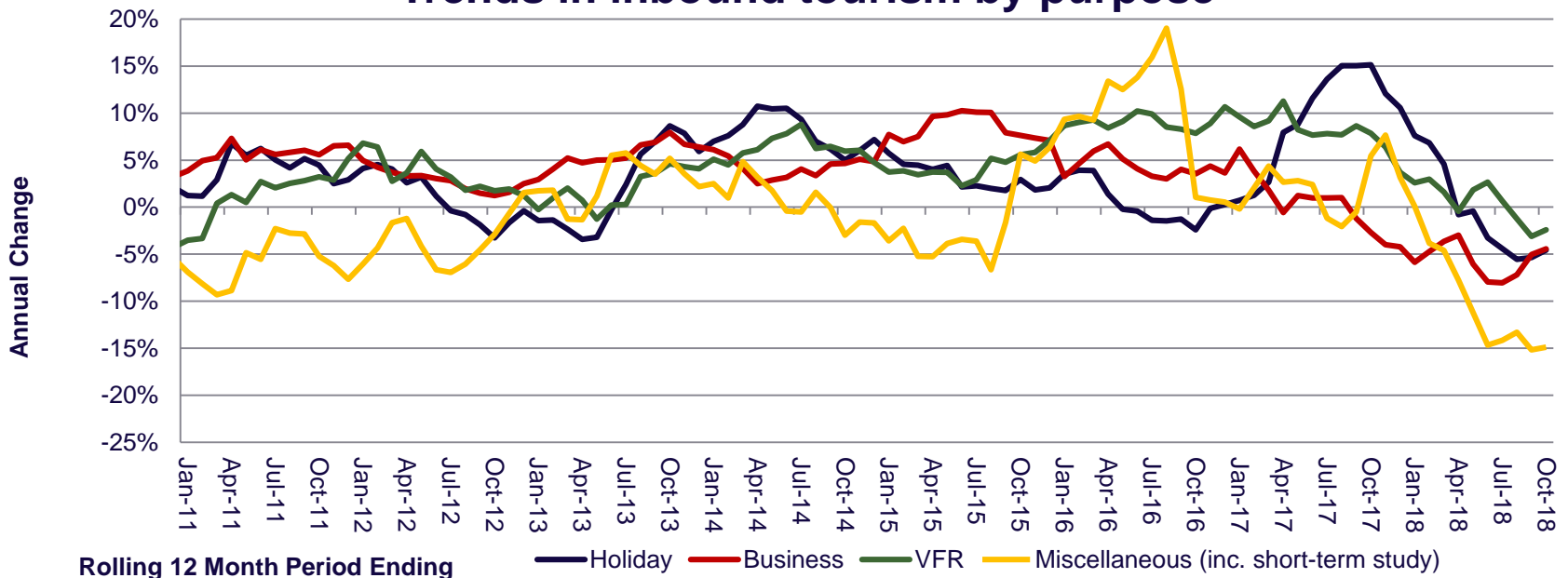
- This chart shows the year-on-year change in headline IPS results based on a 'rolling twelve-month' basis. Presenting the data in this way enables us to spot emerging trends and helps to 'smooth out' erratic results for any single month.
- This clearly illustrates the dip in inbound tourism seen post 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 until late 2017. In recent months, we have observed a more downwards trend settling in.
- Whilst visits growth has remained positive in recent years, spend has fluctuated more. As of October 2018, visits in the last twelve months were tracking 5% down and spend 8% down compared to 2017 despite both showing positive results in October 2018 alone.

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

Longer term trends

Journey Purpose

Trends in inbound tourism by purpose

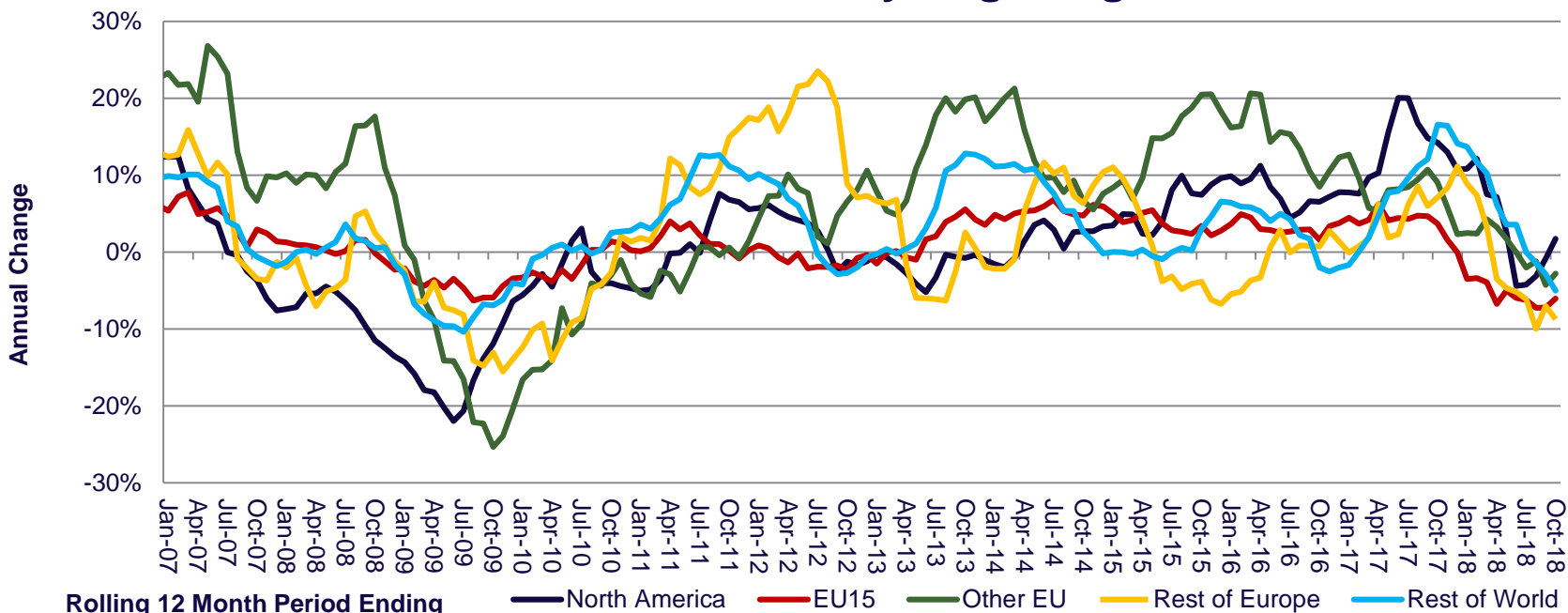


- By journey purpose holiday visits were far more resilient to the economic downturn in the late 2000s and most showed long term growth. There has been some variability in recent years; trends have been different for most journey purpose since 2014.
- After a significant downturn in 2009, business visits 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. 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.

Longer term trends

Global Region

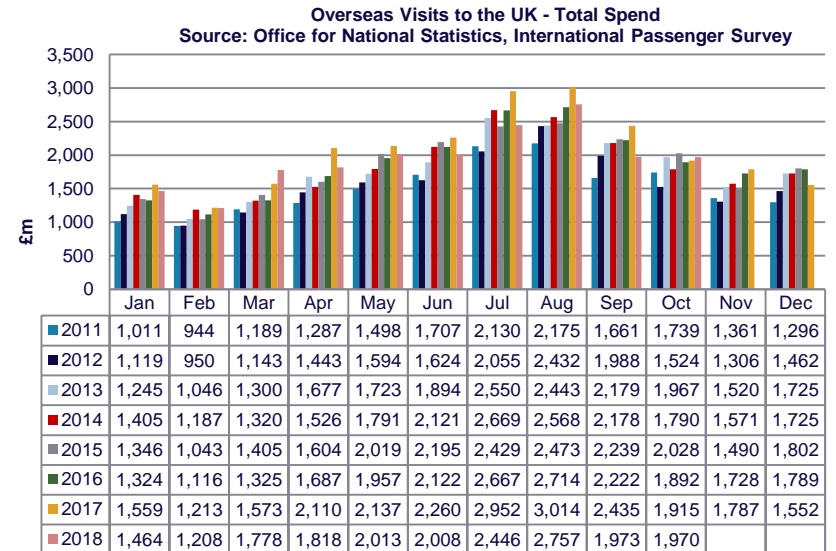
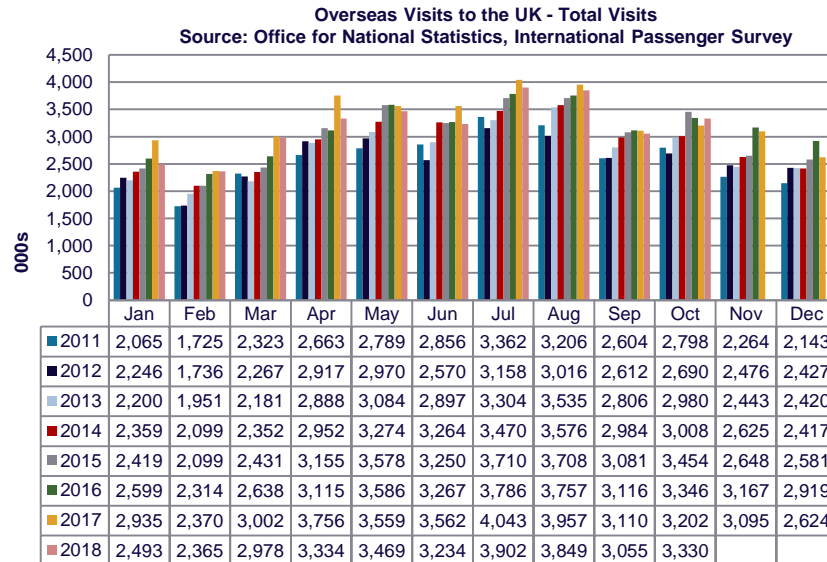
Trends in inbound tourism by origin region since 2007



- This chart shows the longer term picture and the varying rates of recovery in visit numbers after the global financial crisis.
- Until 2017, visits from EU markets were growing at a steady pace, but they have slowed down since and 2018 was down on 2017. Visits from 'Other EU' regions 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' had the strongest recovery growth between 2011/2012 although have shown to be more volatile over the past couple of years, maintaining a positive trend in 2018.
- Visits from North America grew strongly in 2017 and are up again in recent months after a decline earlier in 2018. Visits from the 'Rest of World' region were growing in 2017 and the first half of 2018, but have been slowing down in recent months.

Detailed monthly trends

Visits and spend

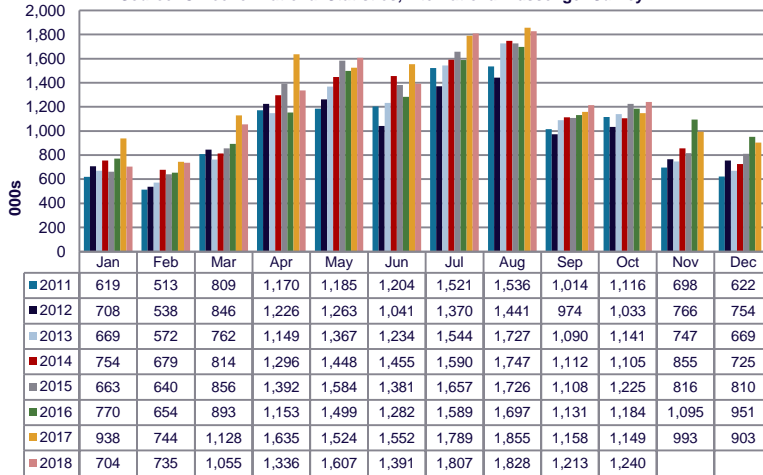


Detailed monthly trends

Journey Purpose

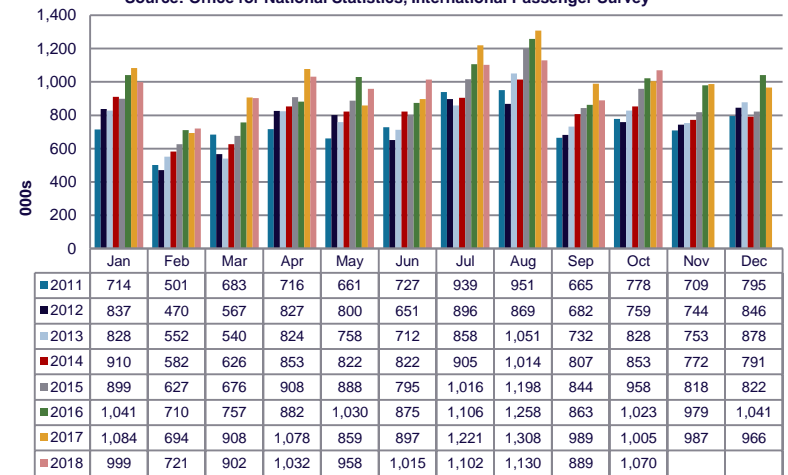
Overseas Visits to the UK - Holiday Visits

Source: Office for National Statistics, International Passenger Survey



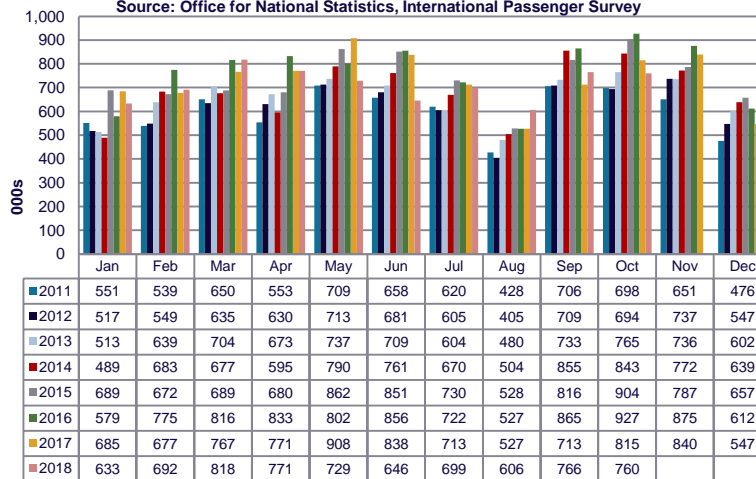
Overseas Visits to the UK - Visits to Friends and Relatives

Source: Office for National Statistics, International Passenger Survey



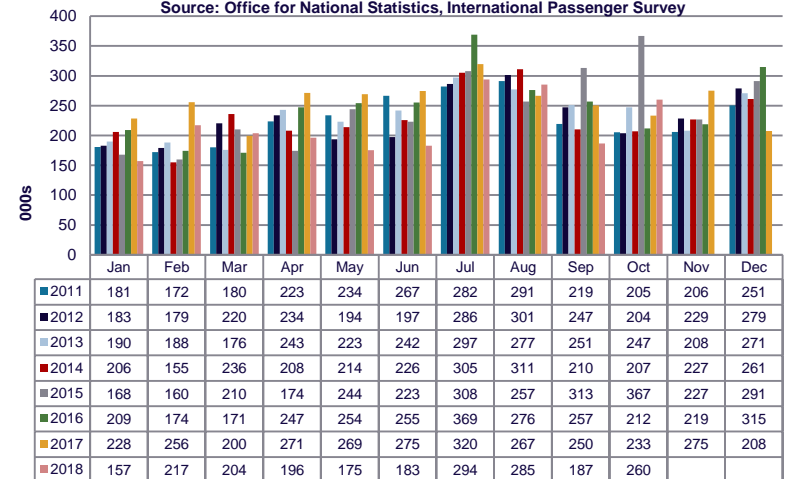
Overseas Visits to the UK - Business Visits

Source: Office for National Statistics, International Passenger Survey



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

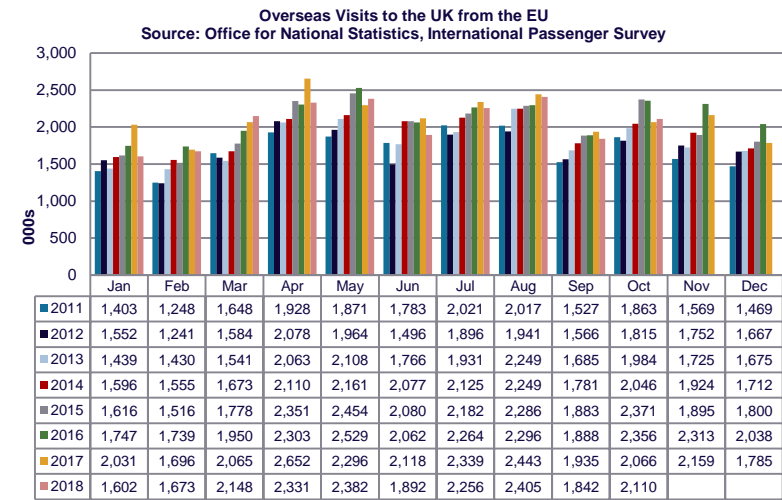
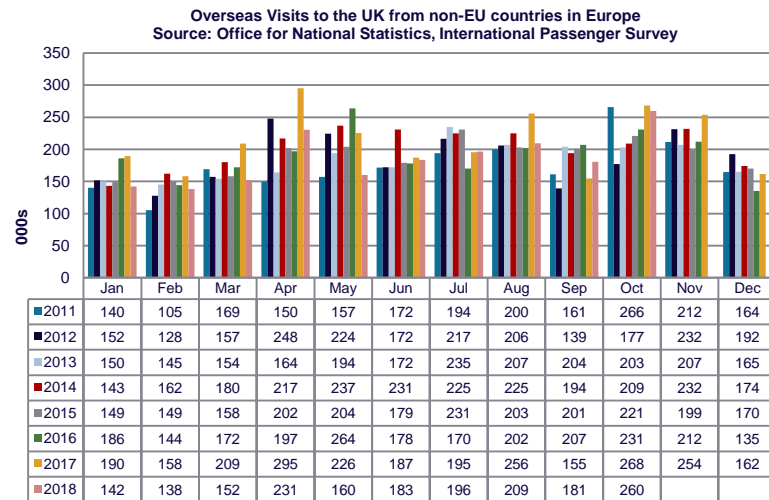
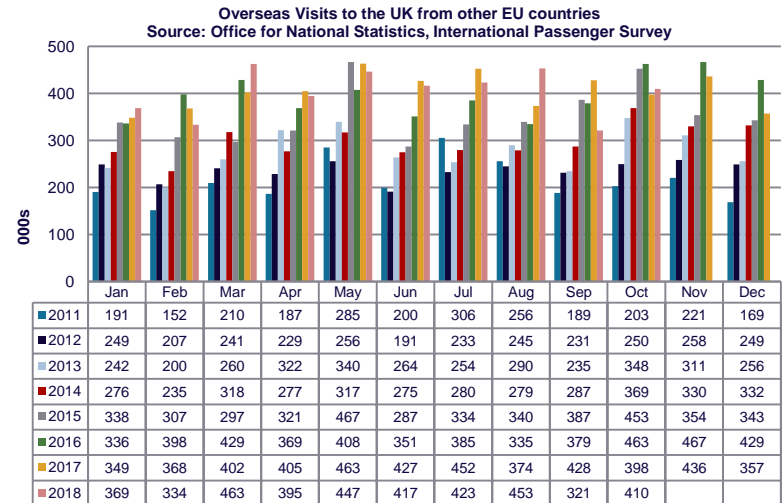
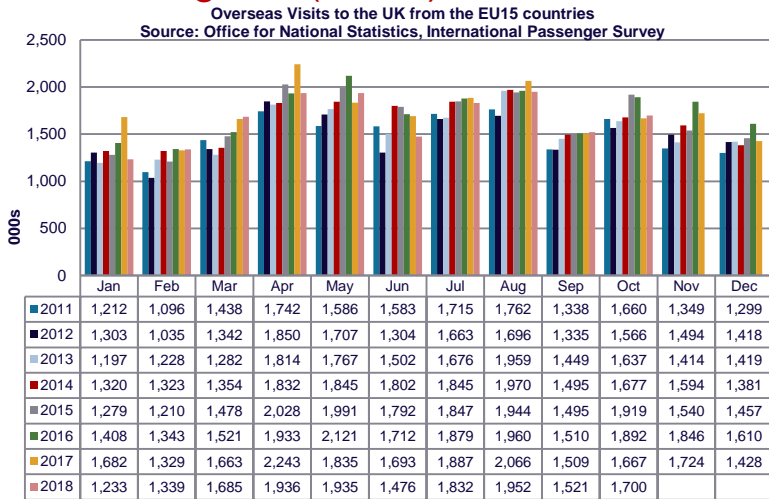
Source: Office for National Statistics, International Passenger Survey



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)

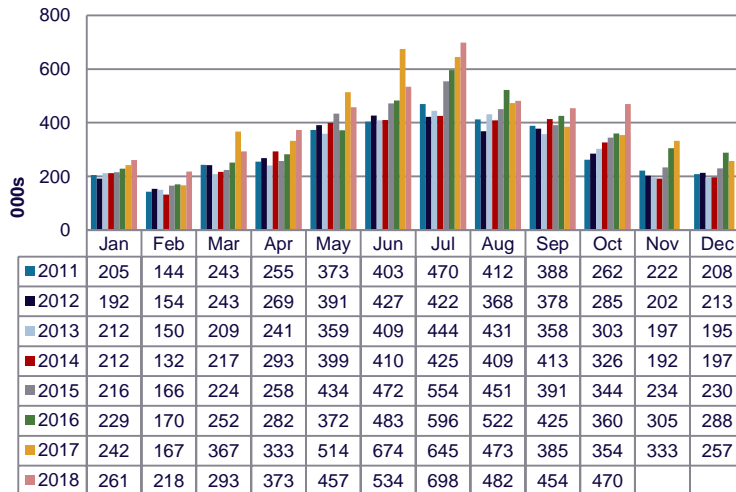


More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available [here](#). Please note that different scales are used on these charts to allow differences to be identified.

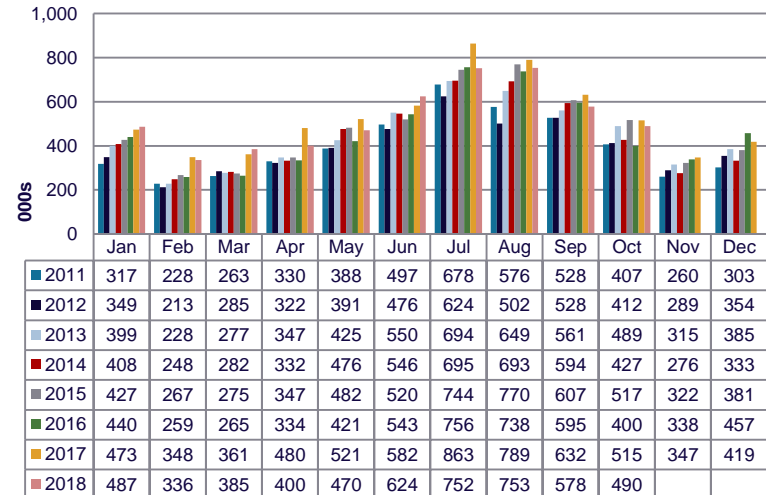
Detailed monthly trends

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

Make sure you get all the latest figures and reports by signing-up for VisitBritain's e-newsletter



Monthly Inbound Update October 2018