

Monthly Inbound Update December 2018

25th March 2019

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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 (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 **January 2019**, is scheduled for **9th May 2019**.

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 – December 2018 (provisional)

	DECEMBER 2018		LAST 3 MONTHS (OCT - DEC)		PROVISIONAL 2018 (JAN - DEC 2018)	
		% change vs. Dec 2017		% change vs. Oct '17 - Dec '17		% change vs. Jan - Dec '17
ALL VISITS (000)	2,850	9%	9,120	2%	37,800	-4%
Spend (£ million)	1,680	8%	5,260	0%	22,720	-7%

- Visits:** The UK welcomed 2.9 million overseas visits in December 2018, up 9% compared to December 2017. This was only the second month of 2018 where monthly results were up on the same month in 2017. There were 9.1 million inbound visits to the UK between October and December 2018, up 2% on the same period in 2017. Despite this positive Q4 result, overseas visits to the UK in 2018 were 4% behind 2017 results with 37.8 million visits.
- Spending:** In December 2018 inbound visitors spent £1.7 billion - 8% more than they did in December 2017. Between October and December 2018 visitors spent a total of £5.3 billion, on par with last 3 months of 2017. As with visits, these positive Q4 results were not quite enough to offset the year on year monthly declines posted earlier in the year. In 2018, visitors to the UK spent a total £22.7 billion, 7% lower compared to the record set in 2017.
- Spend per visit:** In the twelve months to December 2018 visitor spending decreased more rapidly than overseas visits; as a consequence spend per visit in 2018 was down 4% on 2017, to £601 per visit.

Journey Purpose

By journey purpose	DECEMBER 2018		LAST 3 MONTHS (OCT - DEC)		PROVISIONAL 2018 (JAN - DEC 2018)	
	Visits (000)	% change vs. Dec 2017	Visits (000)	% change vs. Oct '17 - Dec '17	Visits (000)	% change vs. Jan - Dec '17
Holiday	1,030	14%	3,360	10%	15,040	-2%
VFR	1,000	4%	2,940	0%	11,690	-3%
Business	580	6%	2,140	-3%	8,500	-3%
Miscellaneous	230	11%	670	-5%	2,570	-16%

- Holiday** visits were up 14% to a little over 1.0 million in December 2018, compared to December 2017. This was the fourth consecutive month of month on month record breaking or equalling holiday visits. Not surprisingly, holiday visits in the final quarter of 2018 were up 10% (a record 3.4 million). Despite this strong finish to 2018, holiday visits for the year were down: there were 15.0 million inbound holiday visits to the UK in 2018, down 2% on the 2017 record.
- Visits to friends and relatives (VFR)** were up 4% year on year to 1.0 million visits in December 2018, not quite a new December record, but only the second December to record 1 million visits. However, with a decline reported in November 2018, VFR visits in the last 3 months of 2018 were just on par with the same period of 2017. Overall, VFR visits to the UK in 2018 were 3% below the record set in 2017 at 11.7 million visits.
- Business** visits rose by 6% in December 2018 compared to December 2017. However, after two months of year-on-year falls (October and November), there were a total of 2.1 million business visits from overseas in October – December 2018, 3% down on the final quarter of 2017. Half of the months in 2018 showed increases on 2017, but this was not enough to offset the scale of declines and as a result business visits were down 3% in 2018, compared to 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. Compared to the other journey purpose categories, miscellaneous visits represent a smaller proportion of inbound UK visits. In December 2018 there were 11% more visits to the UK for miscellaneous purposes than in December 2017. However, with growth in only four months of 2018, compared to the same respective months in 2017, visits for miscellaneous purposes in 2018 were 16% behind visits in 2017.

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.

Global Regions

By global region	DECEMBER 2018		LAST 3 MONTHS (OCT - DEC)		PROVISIONAL 2018 (JAN - DEC 2018)	
	Visits (000)	% change vs. Dec 2017	Visits (000)	% change vs. Oct '17 - Dec '17	Visits (000)	% change vs. Jan - Dec '17
EU Total	1,990	11%	6,180	3%	24,710	-3%
EU15	1,600	12%	4,980	4%	19,890	-4%
Other EU	380	6%	1,180	-1%	4,800	-1%
Rest of Europe	200	24%	650	-5%	2,240	-12%
North America	210	-18%	980	5%	4,750	0%
Rest of World	450	7%	1,320	3%	6,100	-4%

- There were almost 2 million visits to the UK from all **EU markets** in December 2018, up 11% on December 2017. This late surge in visits was enough to offset the decline reported in November and we saw visits in the last quarter of 2017 up 3% compared to the final quarter of 2017. With 24.7 million visits from the EU, in 2018 visits are provisionally down 3% on the record set in 2017.
- Visits to the UK from the **EU15** markets followed a very similar trend. There were 1.6 million visits to the UK in December 2018, up 12% on December 2017. Between October – December 2018 visits were 4% up on the final quarter of 2017 – thanks to the strong December results. The combined EU15 markets are an important inbound market for the UK but with 19.9 million visits from these markets in 2018, this is below (4%) the levels seen in 2017.
- Visits from all **Other EU** markets to the UK in 2018 fluctuated on a month by month basis, compared to 2017. While December posted a positive 6% rise in visits on December 2017; visits in the final quarter of 2018 and over the whole of 2018 are provisionally down 1%.
- Visits to the UK from the **Rest of Europe** jumped 24% year-on-year in December 2018 to a record 200,000 visits. However with depressed or flat results in every other month of 2018, visits for all of 2018 are reporting a 12% decline, compared to 2017.
- There were 210,000 visits from **North America** in December 2018, 18% lower than December 2017. With strong October results, visits for the final quarter of 2018 (October-December) finished 5% up on Q4 2017. For all of 2018, visits from North America to the UK were on par with the levels seen in 2017, though these are not quite enough to set a new record – set in 2000.
- **'Rest of World' markets** saw a 7% rise in visits in December 2018, compared to the same month of 2018. Combined with strong November 2018 results, visits in the final quarter of 2018 were at a record 1.3 million. However, the rise in visits towards the end of 2018, was not enough to compensate for the declines seen earlier in 2018 - provisional results for 2018 show a 4% decline, compared to the record set in 2017.

Outbound and Competitors

Travel abroad by UK residents

LAST THREE MONTHS: October – December 2018		
		% change vs. Oct – Dec 2017
Visits (000)	14,550	-1%
Spend (£ million)	£9,190	+7%

- UK residents took 14.6 million visits abroad in the three months to December 2018 – down slightly on the same period in 2017 – and spent £9.2 billion, up 7% (in nominal terms) on October – December 2017.
- Between October and December 2018, UK residents took 2% more holiday and 7% more business trips abroad than they did during the same time in 2017, but fewer visits to friends and relatives (-10%) and fewer miscellaneous visits (-18%) compared to the same period in 2017.
- Visits by UK residents to Europe overall were down 3% in October – December 2018, compared to the same period the year before. Comparing October – December 2018 to those months in 2017, visits to EU15 countries were down 1%, while visits to other EU destinations were down 16%. Visits during those months increased by 21% to North America, and fell by 2% 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.

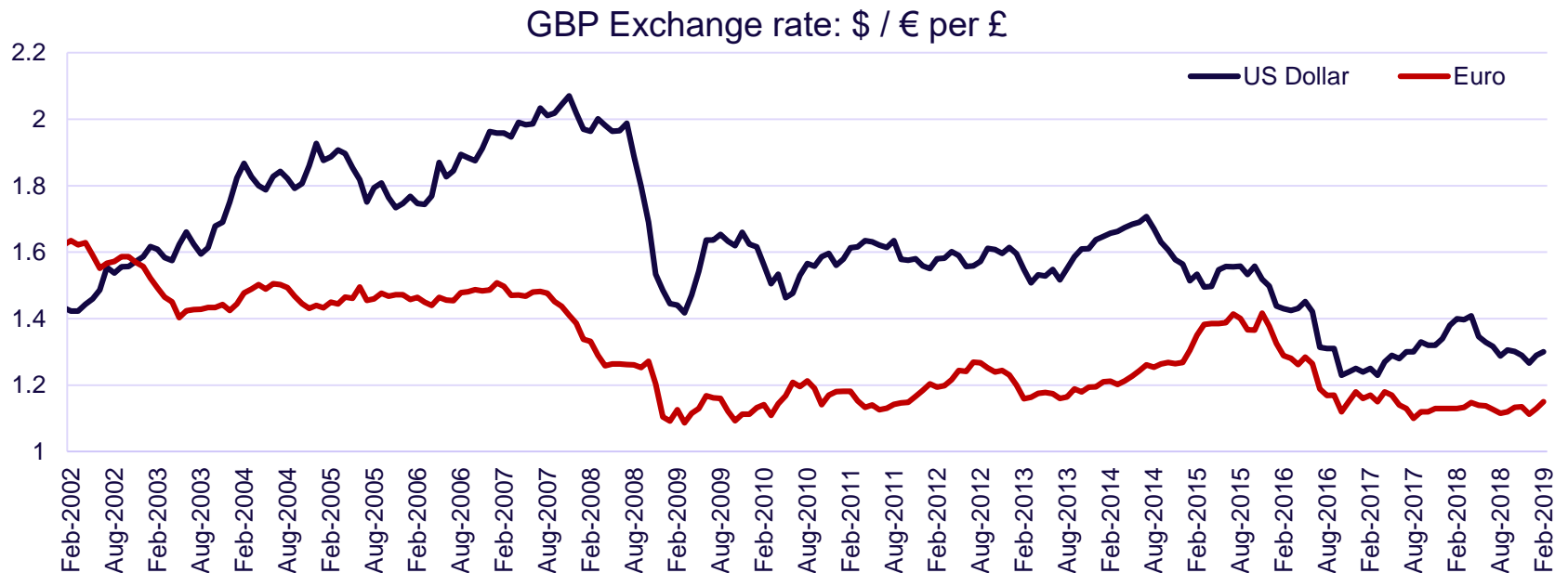
Destination	Growth in overseas visits	Period (Jan 2018 to ...)
Turkey	23%	November
France	8%	October
USA	7%	March
Rep. of Ireland	7%	November
Netherlands	7%	October
Australia	5%	October
Italy	5%	October
Switzerland	5%	November
Germany	4%	October
Canada	1%	October
Spain	1%	December
UK	-4%	December

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.

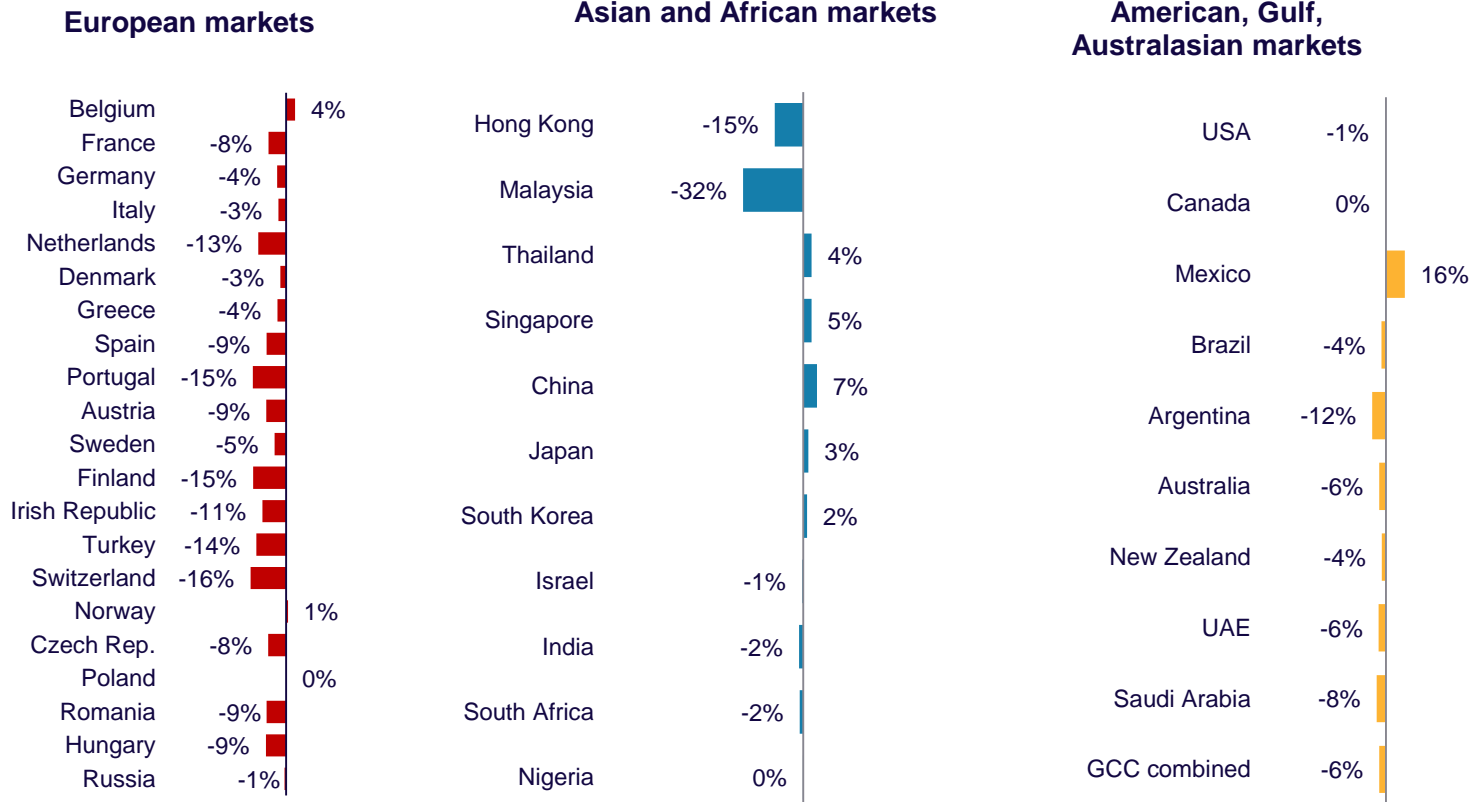
Exchange rates

- 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 6% year on year at \$1.27 in December 2018, and 15% compared to December 2016. Against the euro, in December 2018, at €1.11, Sterling was 2% down compared to its value in December 2017, but 19% down compared to December 2015.
- In December 2018, Sterling was 1% up against the Australian dollar, 1% down against the Canadian dollar and 1% down the Chinese Yuan compared to December 2017; but down 15%, 17% and 10% compared to December 2015 respectively.



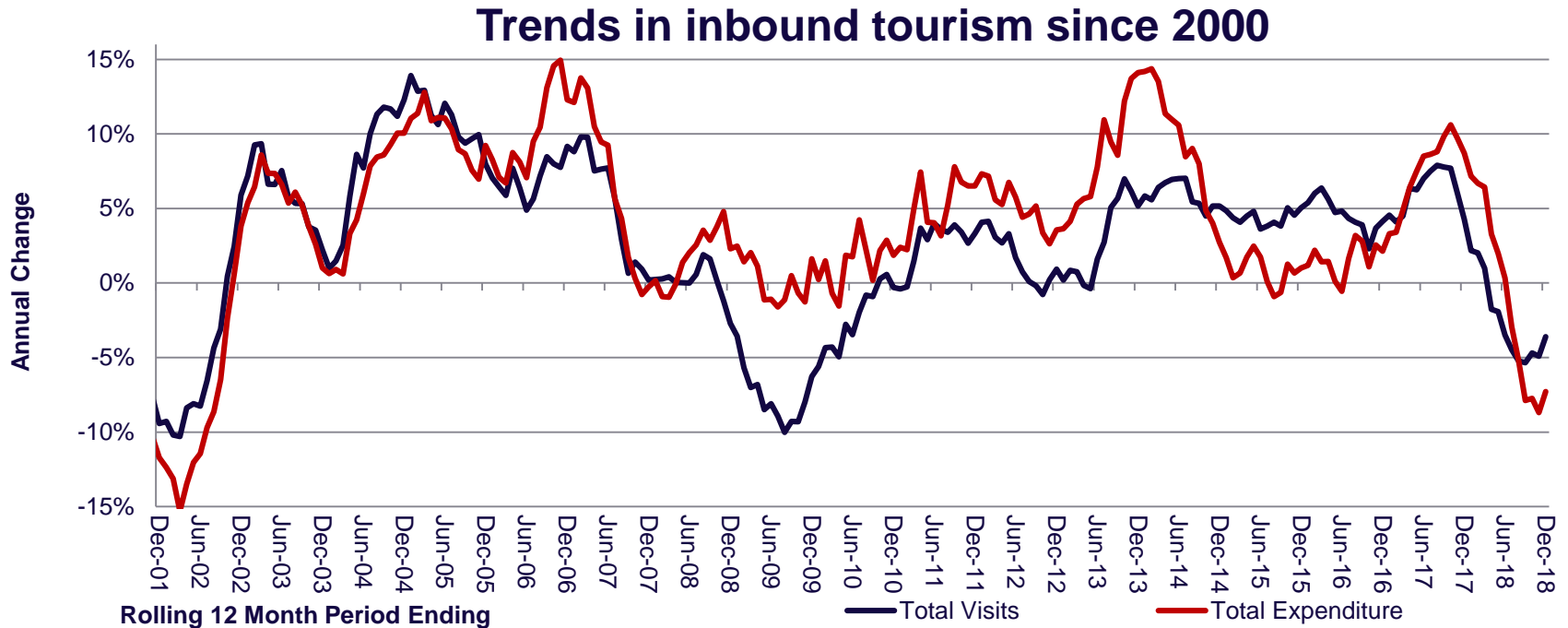
Individual markets – quarterly results

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



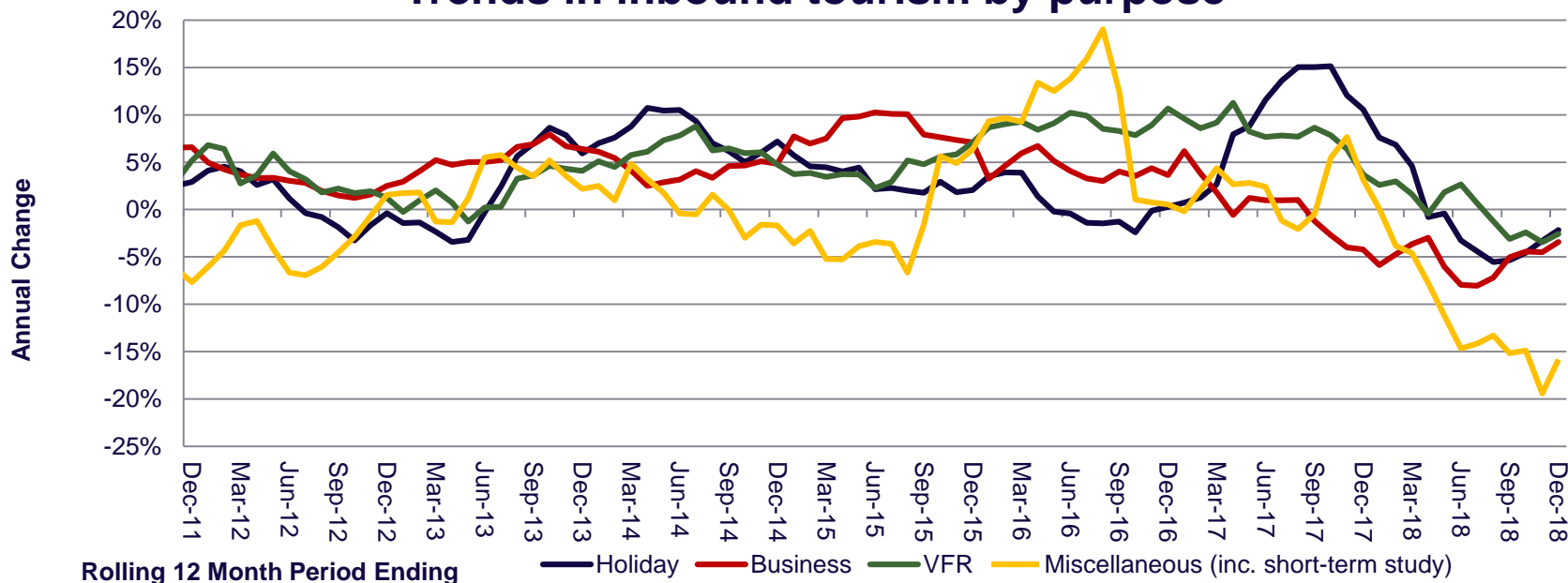
- This chart shows the year-on-year change in headline IPS results based on a 'rolling twelve-month' basis. Presenting the data in this way enables us to spot emerging trends and helps to 'smooth out' erratic results for any single month.
- This clearly illustrates the dip in inbound tourism seen post 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 2018, however, there was a decline in visits and spend.
- Whilst visits growth has remained positive in recent years, spend has fluctuated more. As of December 2018, visits in the last twelve months were tracking 4% down and spend 7% 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

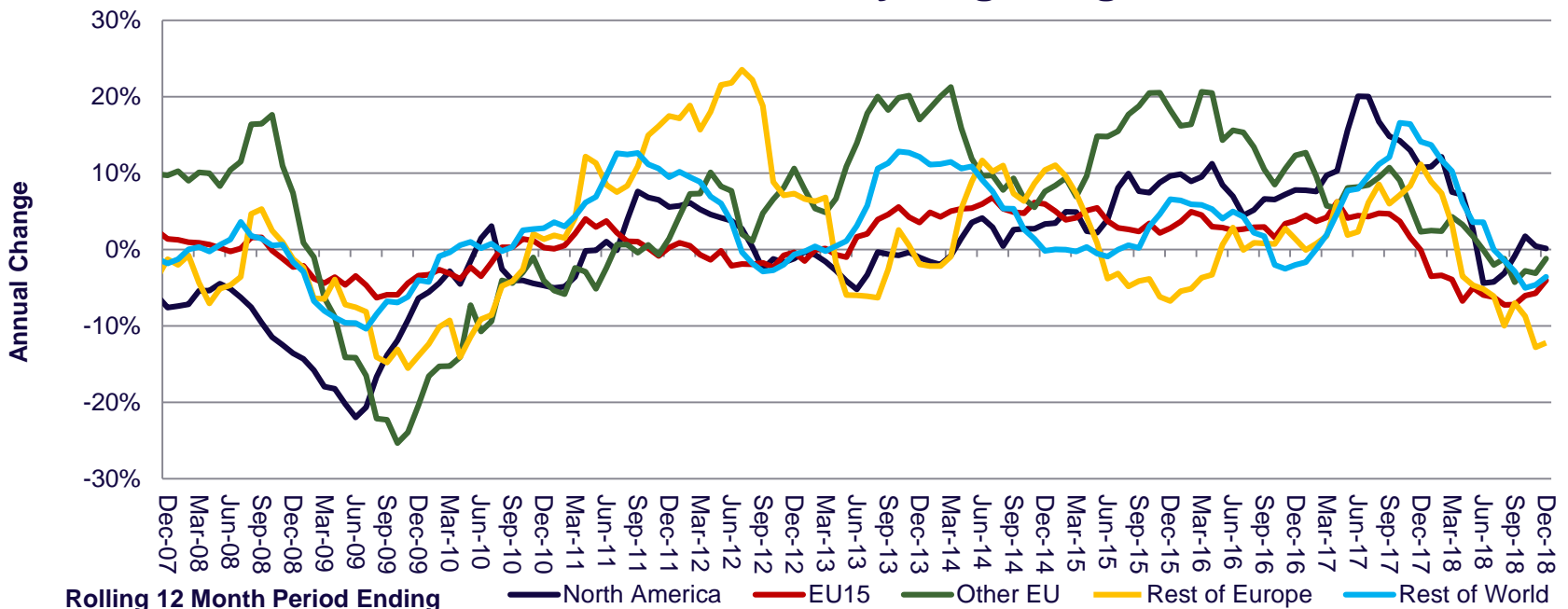


- By journey purpose holiday visits were far more resilient to the economic downturn in the late 2000s and most showed long term growth. There has been some variability in recent years; trends have been different for most journey purposes since 2014.
- After a significant downturn in 2009, business visits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

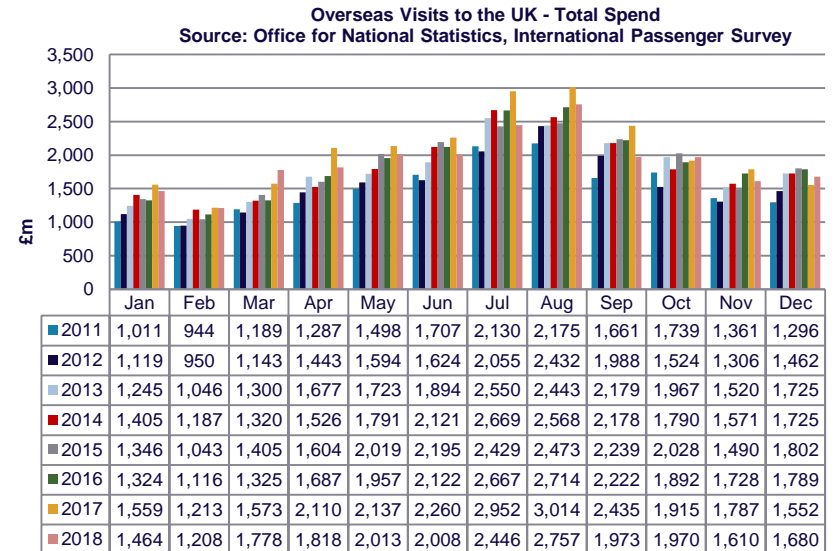
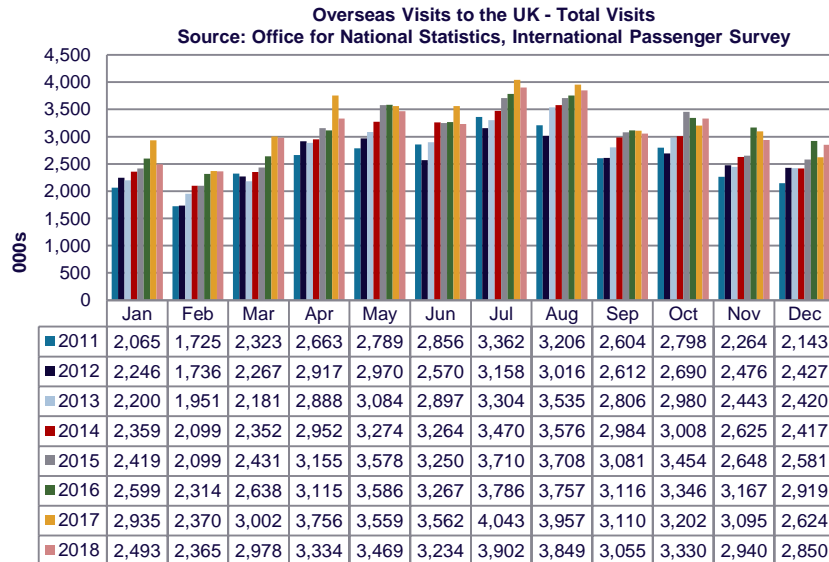
Trends in inbound tourism by origin region since 2007



- 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 matched this level in 2018 despite a decline early in the year. Visits from the 'Rest of World' region were growing in 2017 but declined in 2018.

Detailed monthly trends

Visits and spend

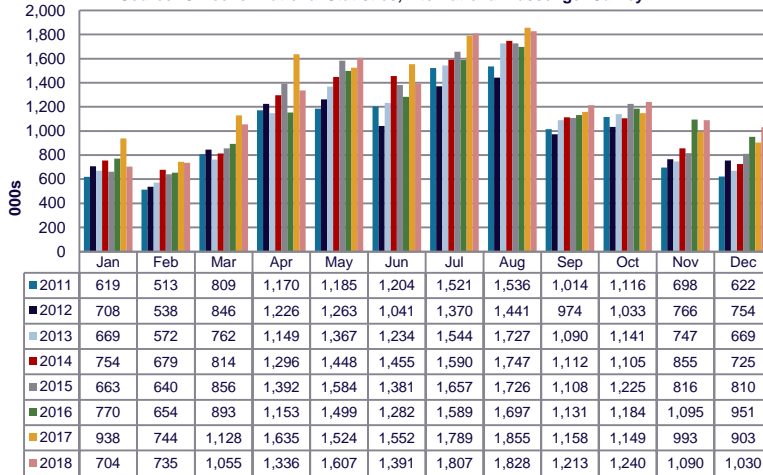


More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available [here](#)

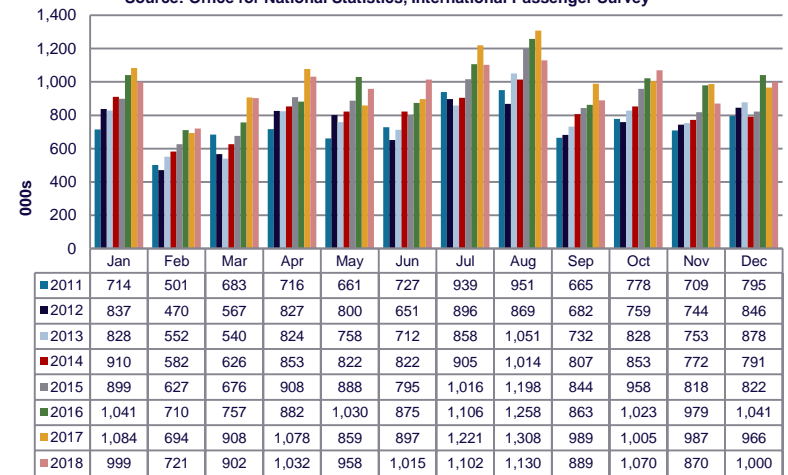
Detailed monthly trends

Journey Purpose

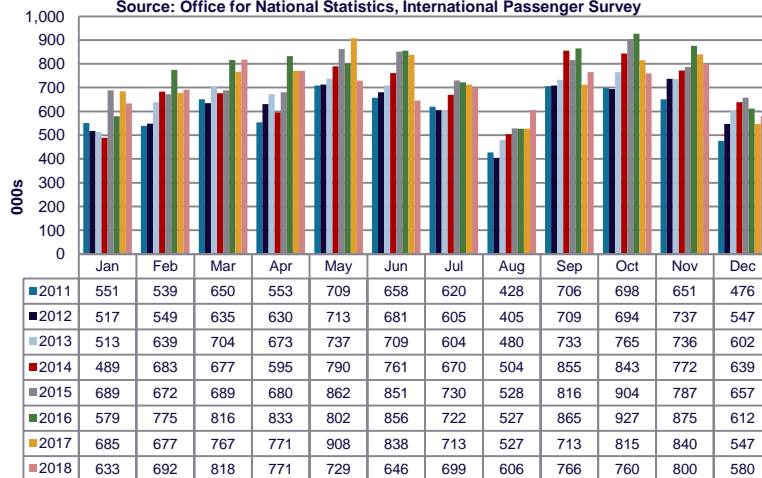
Overseas Visits to the UK - Holiday Visits
Source: Office for National Statistics, International Passenger Survey



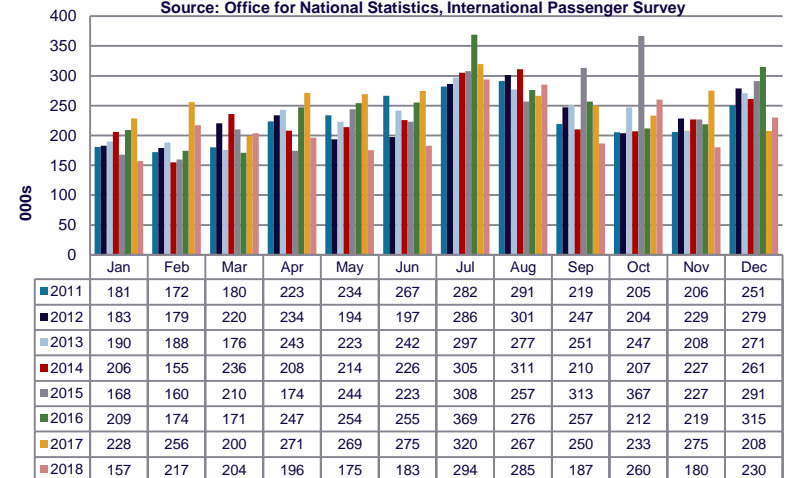
Overseas Visits to the UK - Visits to Friends and Relatives
Source: Office for National Statistics, International Passenger Survey



Overseas Visits to the UK - Business Visits
Source: Office for National Statistics, International Passenger Survey



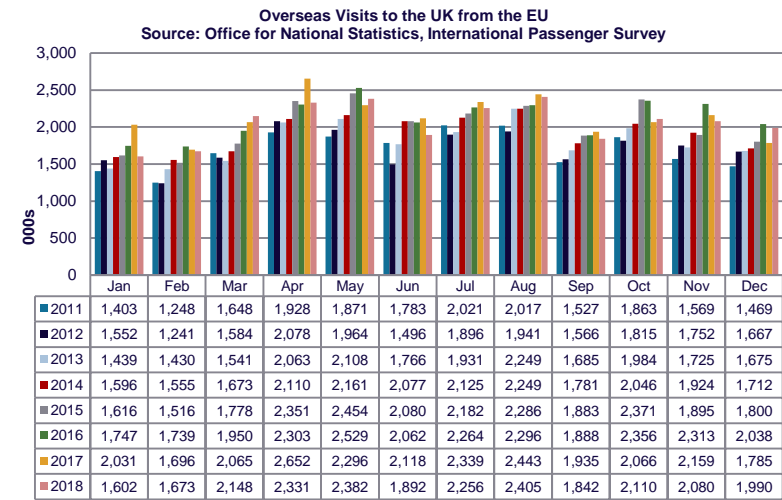
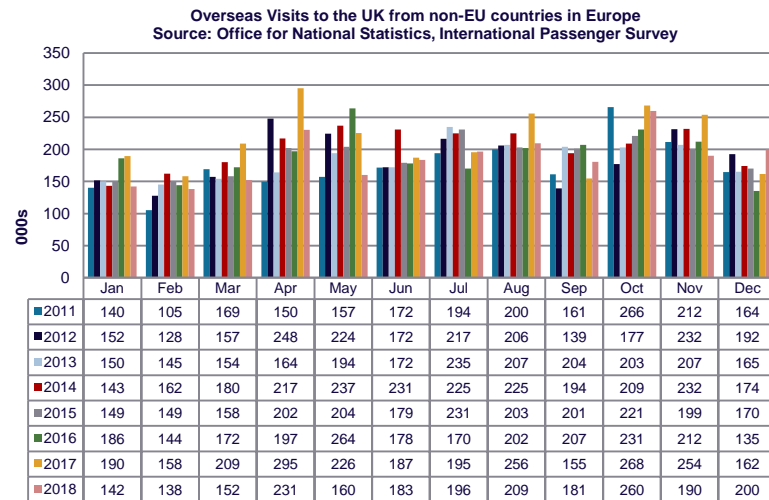
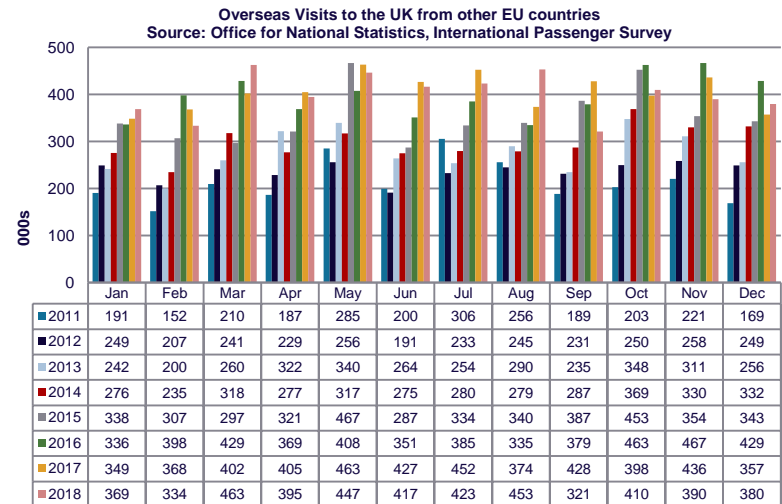
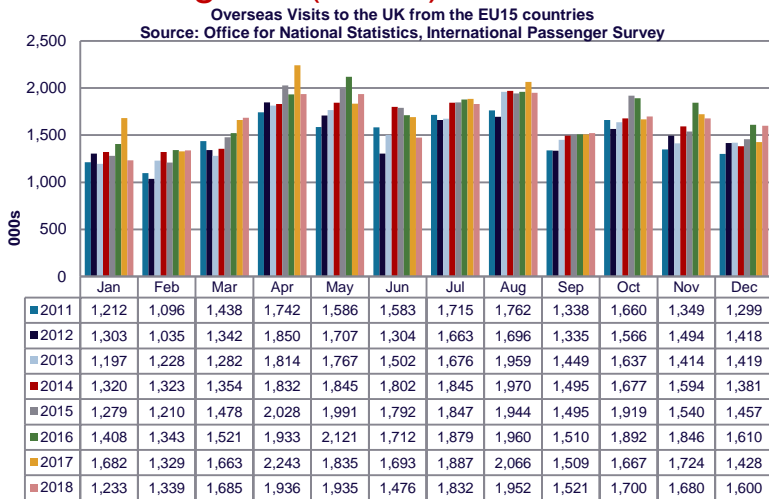
Overseas Visits to the UK - Miscellaneous Visits (includes short-term study)
Source: Office for National Statistics, International Passenger Survey



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)

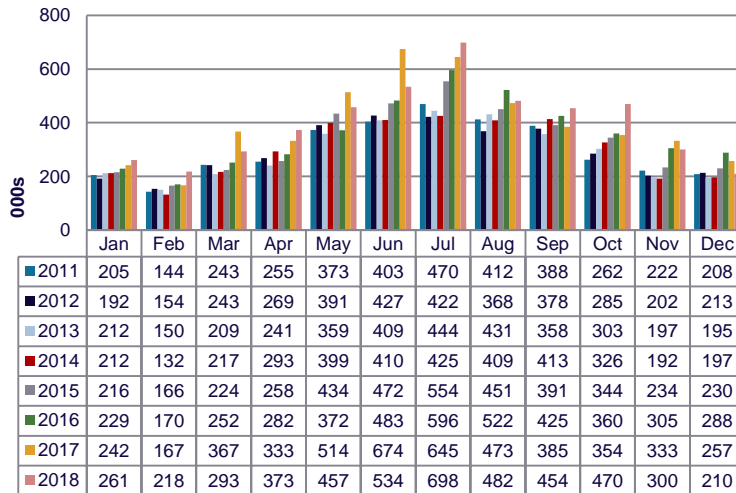


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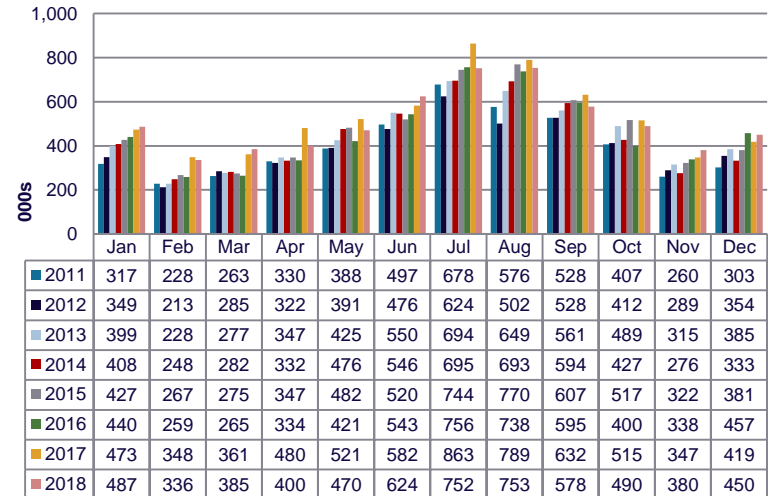
Detailed monthly trends

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

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