

Monthly Inbound Update January 2019

9th May 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 (Q1, January – March 2019), which may contain some revisions, is scheduled to be released in July 2019. This will provide data on visits by markets and UK region visited up to Q1 2019.

The next Monthly Release, covering data for **February 2019**, is scheduled for **30th 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 – January 2019 (provisional)

	JANUARY 2019		LAST 3 MONTHS (NOV 2018 – JAN 2019)		ROLLING 12 MONTHS (FEB 2018 - JAN 2019)	
		% change vs. Jan 2018		% change vs. Nov '17 - Jan '18		% change vs. Feb '17 - Jan '18
ALL VISITS (000)	2,640	6%	8,430	3%	37,950	-2%
Spend (£ million)	1,460	0%	4,750	-1%	22,720	-7%

- Visits:** The UK welcomed 2.6 million overseas visits in January 2019, up 6% compared to January 2018. This was the second highest level of January visits (the record holder is January 2017). There were 8.4 million inbound visits to the UK between November 2018 and January 2019, up 3% on the same period in 2017/2018. Despite these more positive results, overseas visits to the UK in the twelve months to January 2019 were 2% behind the record previous twelve months with 38.0 million visits.
- Spending:** In January 2019 inbound visitors spent £1.5 billion – on par with the first month of 2018. In the 3 months from November 2018 to January 2019 visitors spent a total of £4.8 billion, just 1% below the 3 months to January 2018. As with visits, more recent results have not been enough to offset the year on year monthly declines posted earlier in 2018. In the twelve months to January 2019, visitors to the UK spent a total £22.7 billion, 7% lower compared to the previous (record holding) 12 month period.
- Spend per visit:** In the twelve months to January 2019 visitor spending decreased more rapidly than overseas visits; as a consequence spend per visit in this period was down 5% on the previous 12 month period (February 2017 – January 2018), to £599 per visit.

Journey Purpose

By journey purpose	JANUARY 2019		LAST 3 MONTHS (NOV 2018 – JAN 2019)		ROLLING 12 MONTHS (FEB 2018 - JAN 2019)	
	Visits (000)	% change vs. Jan 2018	Visits (000)	% change vs. Nov '17 - Jan '18	Visits (000)	% change vs. Feb '17 - Jan '18
Holiday	880	25%	3,000	15%	15,210	1%
VFR	960	-4%	2,830	-4%	11,650	-2%
Business	630	0%	2,010	0%	8,500	-3%
Miscellaneous	170	8%	580	-9%	2,580	-13%

- **Holiday** visits were up 25% to 880,000 in January 2019, compared to January 2018 – though this wasn't quite enough to claim any new January record (set in January 2017). There were a record 3 million holiday visits (the first time holiday visits have exceeded 3 million for the Nov-Jan period) to the UK in the 3 months to January 2019 as the strong finish to 2018 carried on into the start of 2019. Holiday visits for the twelve months from February 2018 were up 1% on the previous twelve month period to a new rolling twelve month to January record of 15.2 million.
- **Visits to friends and relatives (VFR)** were down 4% year on year to 960,000 visits in January 2019. However, with sluggish results reported in 7 out of the last 12 months, VFR visits to the UK in the twelve months to January 2019 were 2% below the record set in the previous rolling twelve months at 11.6 million visits.
- **Business** visits were on par with January 2018 at 630,000. With just over 2 million business visits to the UK in the 3 months to January 2019, this too is on par with November 2017 to January 2018. With mixed month on month results during 2018 any positives were not enough to offset the scale of declines and as a result business visits were down 3% in the twelve months to January 2019 (compared to the previous 12 month period).
- **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 and results do tend to fluctuate. In January 2019 there were 8% more visits to the UK for miscellaneous purposes than in January 2018. With mostly negative results reported in 2018, miscellaneous visits in the rolling twelve months to January 2019 are down 13%, compared to the previous twelve month period.

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.

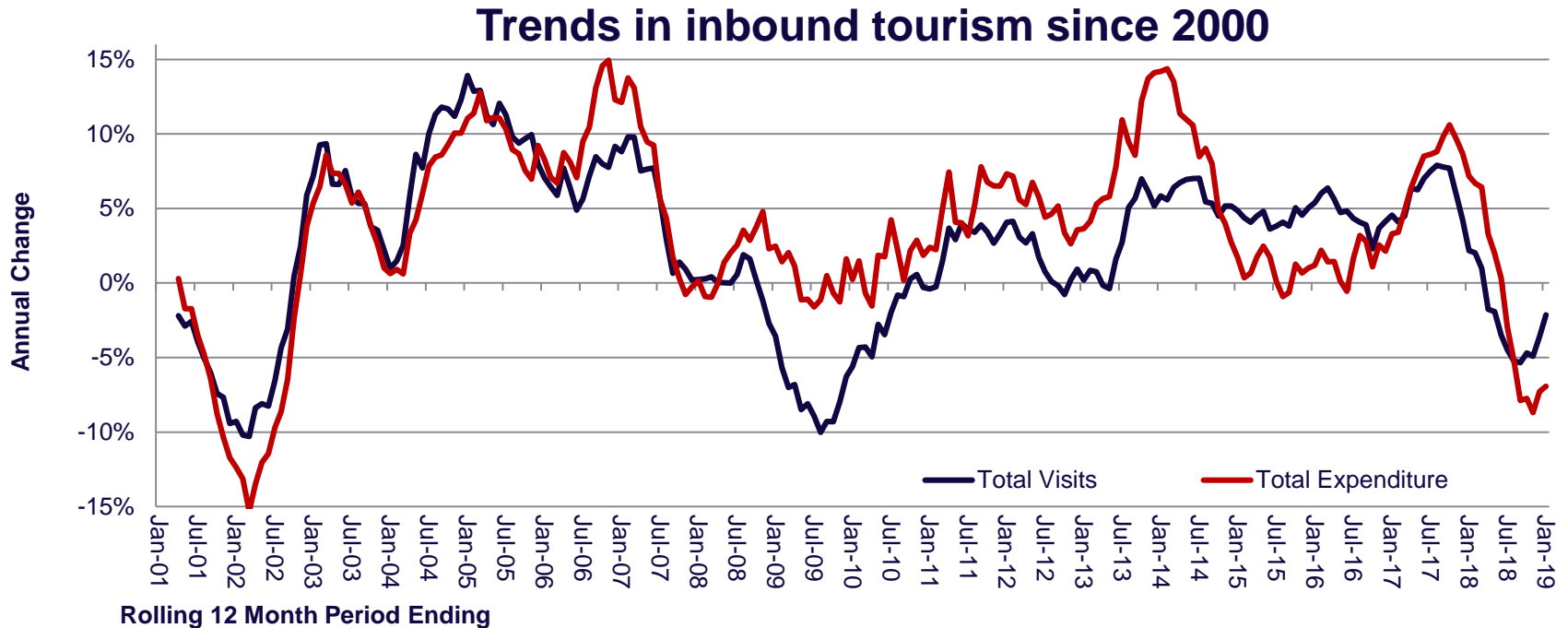
Global Regions

By global region	JANUARY 2019		LAST 3 MONTHS (NOV 2018 – JAN 2019)		ROLLING 12 MONTHS (FEB 2018 - JAN 2019)	
	Visits (000)	% change vs. Jan 2018	Visits (000)	% change vs. Nov '17 - Jan '18	Visits (000)	% change vs. Feb '17 - Jan '18
EU Total	1,760	10%	5,830	5%	24,870	-1%
EU15	1,400	14%	4,680	7%	20,060	-1%
Other EU	360	-3%	1,130	-2%	4,790	-2%
Rest of Europe	130	-8%	520	-7%	2,230	-11%
North America	300	15%	810	-4%	4,790	1%
Rest of World	450	-8%	1,280	2%	6,070	-4%

- There were 1.8 million visits to the UK from all **EU markets** in January 2019, up 10% on January 2018. There was a late surge in visits towards the end of 2018, which means visits in the 3 months to January 2019 were up 5% compared to November 2017 and January 2018. With 24.9 million visits from the EU in the 12 months to January 2019, visits are down just 1% compared to the previous twelve months.
- Visits to the UK from the **EU15** markets followed a very similar trend. There were 1.4 million visits to the UK in January 2019, up 14% on January 2018. Between November 2018 and January 2019 visits were 7% up on the same 3 months of 2017/2018. The combined EU15 markets are an important inbound market for the UK and with 20.1 million visits from these markets in the twelve months to January 2019, this is just below (1%) the levels seen in the previous twelve month period.
- Visits from all **Other EU** markets to the UK fluctuated on a month by month basis in 2018, compared to 2017, and were down a further 3% in January 2019. While December 2018 posted a 6% rise, visits in the 3 months to January 2019 were down 2%.
- Visits to the UK from the **Rest of Europe** fell 8% year-on-year in January 2019. With depressed or flat results in every month of 2018 (except December), visits in the 3 months to January 2019 and longer term rolling twelve months are both down.
- There were 300,000 visits from **North America** in January 2019, 15% more than in January 2018. With relatively weaker results towards the end of 2018, visits in the 3 months to January 2019 are 4% below the same period a year ago, but in line (up 1%) over the longer term rolling the twelve months to January 2019 (compared to the twelve months to January 2018).
- **'Rest of World' markets** saw an 8% decline in visits in January 2019, compared to January 2018. Combined with strong November 2018 results, visits in the 3 months to January 2019 were at a record 1.3 million. However, with declines seen earlier in 2018, provisional results for the twelve months to January 2019 show a 4% decline, compared to the record set in the twelve months to January 2018.

Longer term trends

Visits and spend since 2001

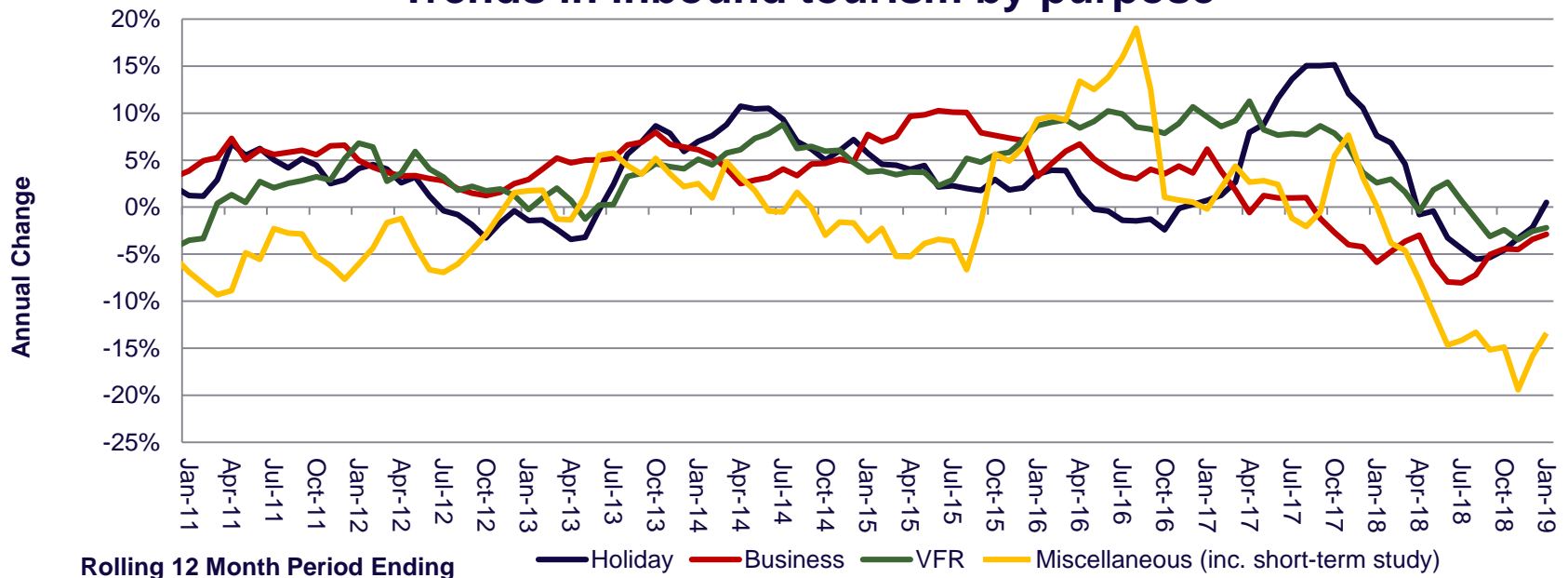


- This chart shows the year-on-year change in headline IPS results based on a 'rolling twelve-month' basis. Presenting the data in this way enables us to spot emerging trends and helps to 'smooth out' erratic results for any single month.
- This clearly illustrates the dip in inbound tourism seen post 9/11 in 2001-02, 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 January 2019, visits in the last twelve months were tracking 2% down and spend 7% down despite both showing positive results in the last two months.

Longer term trends

Journey Purpose

Trends in inbound tourism by purpose

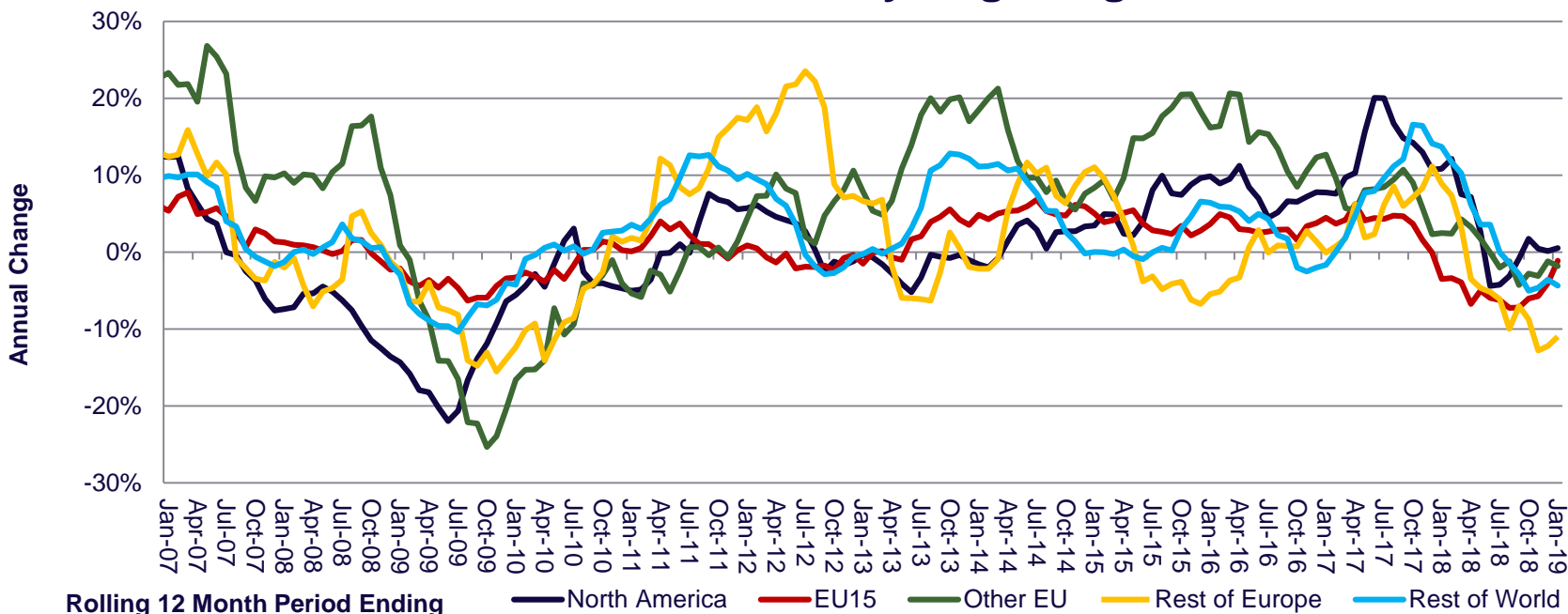


- By journey purpose holiday visits were far more resilient to the economic downturn in the late 2000s and mostly have shown long term growth. There has been some variability in recent years. Trends have been different for most journey purposes since 2014.
- After a significant downturn in 2009, business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

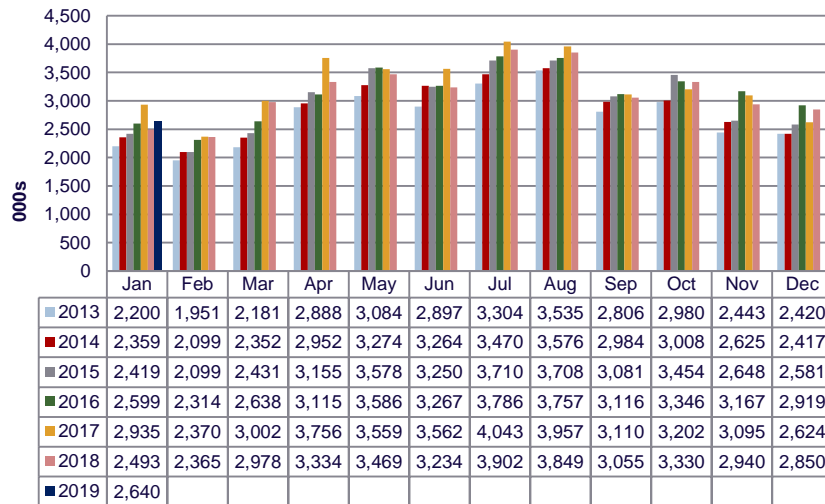


- This chart shows the longer term picture and the varying rates of recovery in visit numbers after the global financial crisis.
- Until 2017, visits from EU markets were growing at a steady pace, but they have slowed down since and 2018 was down on 2017. Visits from 'Other EU' markets outside EU15 had 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' have been more volatile over the past few years, with a decline seen 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.

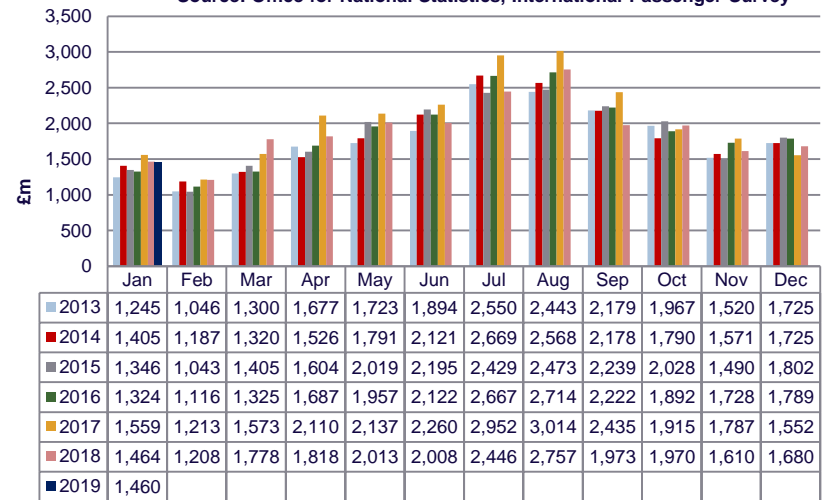
Detailed monthly trends

Visits and spend

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



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

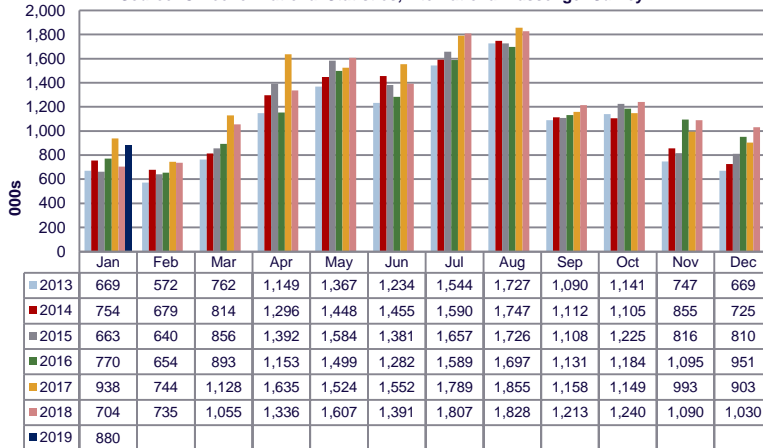


More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available [here](#)

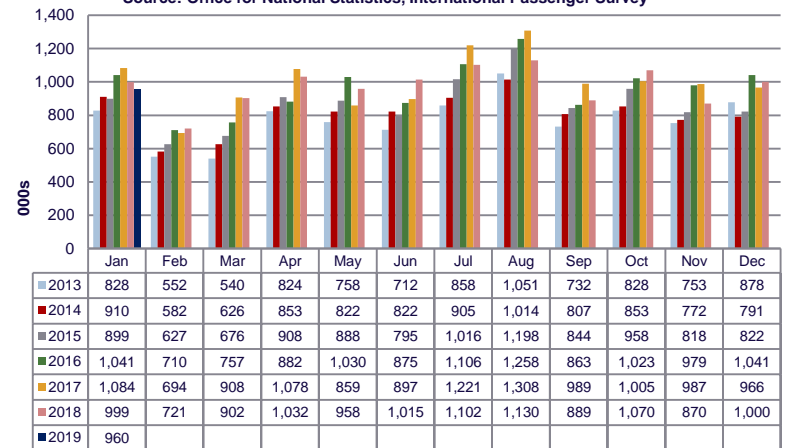
Detailed monthly trends

Journey Purpose

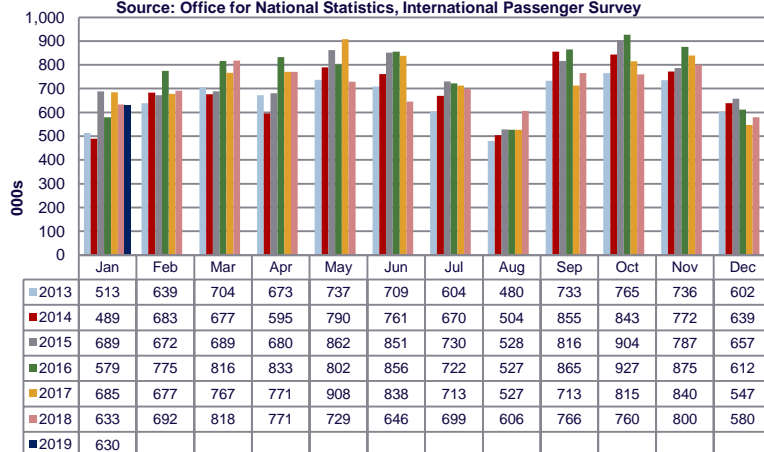
Overseas Visits to the UK - Holiday Visits
Source: Office for National Statistics, International Passenger Survey



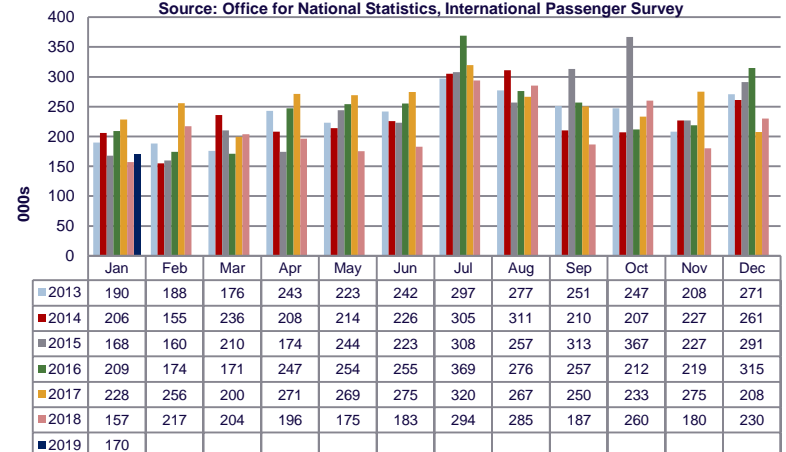
Overseas Visits to the UK - Visits to Friends and Relatives
Source: Office for National Statistics, International Passenger Survey



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



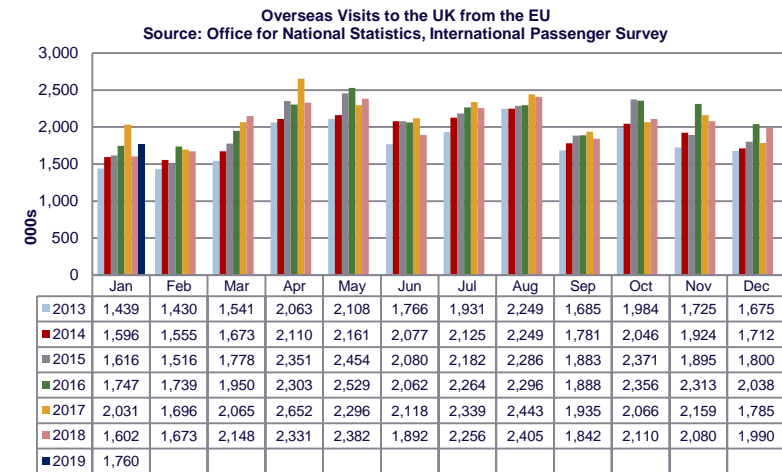
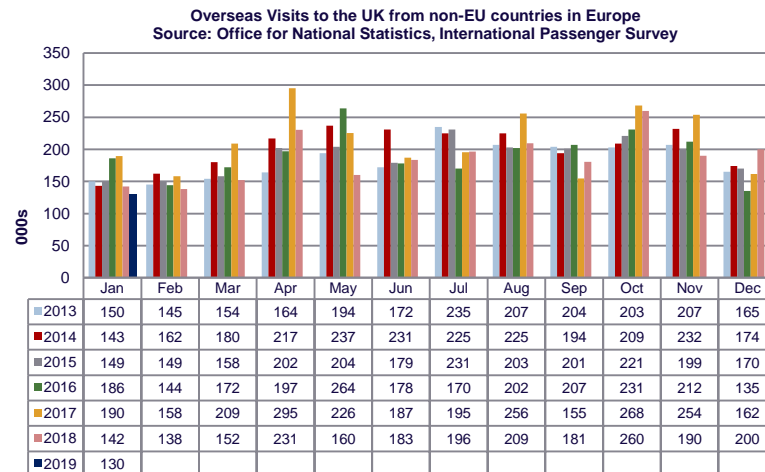
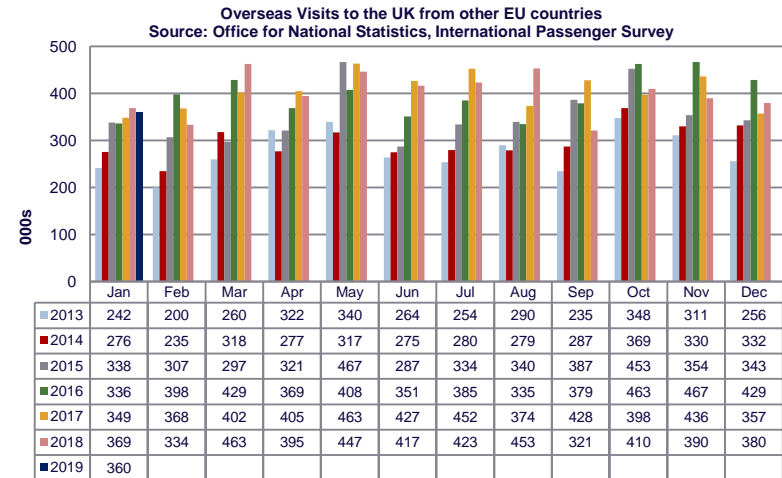
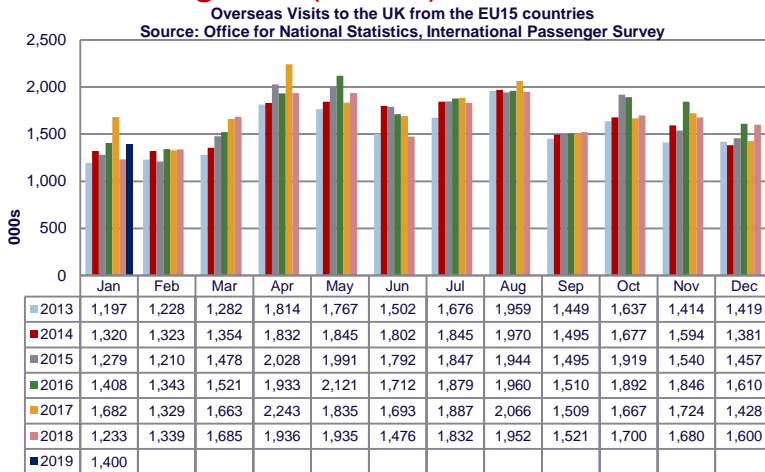
Overseas Visits to the UK - Miscellaneous Visits (includes short-term study)
Source: Office for National Statistics, International Passenger Survey



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)

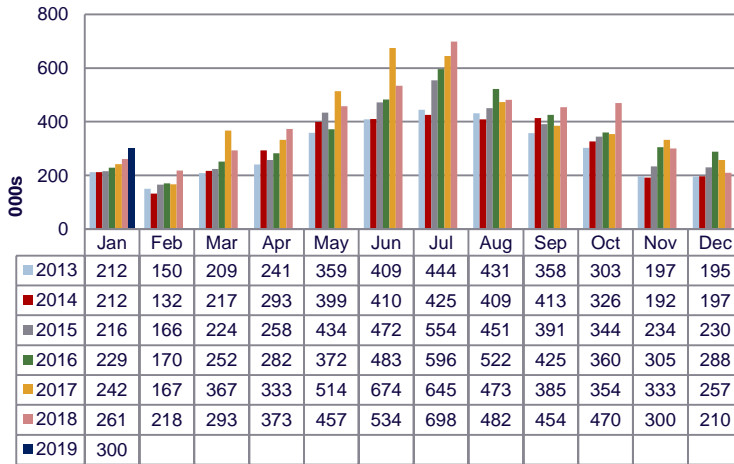


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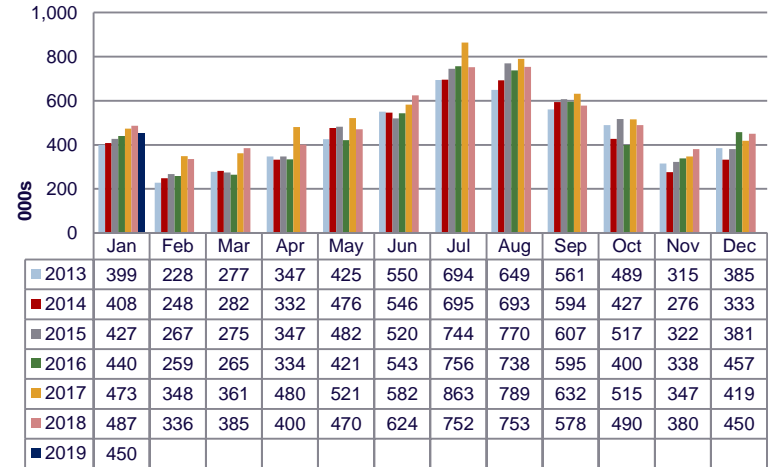
Detailed monthly trends

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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