

Monthly Inbound Update May 2019

29th August 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).

Both April and May data were released on 29th August (the previous monthly update covered data to March 2019).

The Quarterly Release for this period (Q2, April – May 2019), which may contain some revisions, is scheduled to be released on 25th October 2019. This will provide data on visits by markets and UK region visited up to Q2 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 – May 2019 (provisional)

	MAY 2019		LAST 3 MONTHS (MAR - MAY)		YEAR TO DATE (JAN - MAY 2019)		ROLLING 12 MONTHS (JUN 2018 - MAY 2019)	
		% change vs. May 2018		% change vs. Mar '18 - May '18		% change vs. Jan - May '18		% change vs. Jun '17 - May '18
ALL VISITS (000)	3,280	-6%	9,360	-5%	14,310	-3%	37,520	-2%
Spend (£ million)	2,060	-1%	5,310	-7%	7,920	-6%	22,400	-8%

- Visits:** The UK received 3.3 million overseas visits in May 2019, down 6% year-on-year, following an 8% decline in April; visits in the last three months were down 5% to 9.4 million. There were 14.3 million inbound visits to the UK between January and May 2019, 3% below the inbound visits in the same period in 2018. Overseas visits to the UK in the twelve months to May 2019 were 2% behind June 2017 – May 2018 with 37.5 million visits.
- Spending:** In May 2019 inbound visitors spent £2.1 billion, down 1% on May 2018. Spending in April was down 15% on 2018. With inbound spending down year-on-year in each of the last four months, spend in the year to date was 6% below January – May 2018, and down 7% in the last three months. Overall, overseas visitors to the UK spent £22.4 billion in the twelve months to May 2019, down 8% compared to the previous twelve-month period.

Journey Purpose

By journey purpose	MAY 2019		LAST 3 MONTHS (MAR - MAY)		YEAR TO DATE (JAN - MAY 2019)		ROLLING 12 MONTHS (JUN 2018 - MAY 2019)	
	Visits (000)	% change vs. May 2018	Visits (000)	% change vs. Mar '18 - May '18	Visits (000)	% change vs. Jan - May '18	Visits (000)	% change vs. Jun '17 - May '18
Holiday	1,350	-16%	3,770	-6%	5,440	0%	15,110	2%
VFR	1,020	7%	2,810	-3%	4,470	-3%	11,610	-3%
Business	740	2%	2,200	-5%	3,470	-5%	8,270	-4%
Miscellaneous	170	-8%	570	-3%	910	-5%	2,520	-10%

- **Holiday** visits decreased year-on-year for the first time in 2019 in May, down 16% on 2018. This sharp decline is likely to have been partly influenced by the timing of Whit Monday, a public holiday in many European countries that fell in June 2018 but May 2019; however, it was also the weakest May for holiday visits since 2012. With growth earlier in 2019, holiday visits are down a milder 6% in the past three months and for the year to date period numbers matched 2018 at 5.4 million. In the last twelve months to May 2019, holiday visits were up 2% on the previous twelve-month period to a record 15.1 million.
- **Visits to friends and relatives (VFR)** were up 7% in May to 1.0 million, just short of the 2017 record. However, after declining in each previous month this year, they are down 3% in both the past three months and year to date figures compared to the records set in 2018. They are also down 3% in the latest rolling 12 months.
- **Business** visits were up 2% in May to 740,000, though well below the record set in 2017. They are down 5% on 2018 in both the last 3 months and year to date figures; in each case the 2018 results were also down on 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 and results do tend to fluctuate. Visits were down 8% year-on-year in May, down 5% year to date to 910,000 and down 10% over the latest rolling 12 months.

Global Regions

By global region	MAY 2019		LAST 3 MONTHS (MAR - MAY)		YEAR TO DATE (JAN - MAY 2019)		ROLLING 12 MONTHS (JUN 2018 - MAY 2019)	
	Visits (000)	% change vs. May 2018	Visits (000)	% change vs. Mar '18 - May '18	Visits (000)	% change vs. Jan - May '18	Visits (000)	% change vs. Jun '17 - May '18
EU Total	2,010	-16%	6,340	-8%	9,780	-4%	24,400	-2%
EU15	1,570	-19%	4,990	-10%	7,610	-7%	19,390	-4%
Other EU	440	-1%	1,360	4%	2,160	8%	5,020	3%
Rest of Europe	180	13%	600	10%	850	4%	2,270	-2%
North America	600	31%	1,240	10%	1,710	7%	4,830	2%
Rest of World	490	2%	1,180	-7%	1,960	-6%	6,010	-4%

- Visits from **the EU** were down 16% in May to 2.0 million. The timing of Whit Monday, a public holiday in many European countries that fell in June 2018 but May 2019, will have contributed to this decline; however, it was also the weakest May for visits from the EU since 2012. The last three months are down 8% and the year to date down 4%, with the latest rolling year down a milder 2%. Once the June figures are out we should get a better sense of the trend.
 - Within this, visits from the **EU15 markets** were down 19% in May. They were down 10% in the past 3 months to 5.0 million and down 7% year to date to 7.6 million.
 - Visits from **Other EU** were, however, down a milder 1% in May; they were up 4% in the past 3 months to 1.4 million and up 8% for the year to date to 2.2 million – both records.
- Visits to the UK from the **Rest of Europe** were up 10% in the past 3 months and 4% year to date.
- Visits from **North America** were up 31% year-on-year in May to 600,000 – a new record. They were up 10% in the March-May period and 7% year to date to 1.7 million – both the second highest ever after the records set in 2000. Visits in the latest rolling 12 months are up 2% to 4.8 million – just short of the record of 4.9 million, again set in 2000.
- **'Rest of World' markets** saw a 2% increase in visits in May 2019 vs May 2018 to 490,000, though short of a new record. However, visits were down 7% in the March-May period and year to date, compared to 2018, and are 4% down in the latest rolling 12 months.

Outbound and Competitors

Travel abroad by UK residents

LAST THREE MONTHS: March – May 2019		
		% change vs. Mar – May 2018
Visits (000)	17,080	0%
Spend (£ million)	£10,420	1%

- UK residents took 17.1 million visits abroad between March and May 2019, on par with the levels seen in the same period in 2018. These visitors spent £10.4 billion, up 1% on 2018.
- Between March and May 2019, UK residents took 2% more holiday visits than in the same period in 2018, and the same number of visits to friends or relatives, but 11% fewer business visits and 9% fewer trips for miscellaneous purposes.
- Visits by UK residents to Europe overall were up 2% in March – May 2019, compared to the same period in 2018. Visits to the EU were also up 2%; within this, visits to the EU15 were flat on March – May 2018 and those to EU Other up 11%. Visits to North America were down 21% and to the Rest of the World down 4%.

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, the Republic of Ireland, The Netherlands, and Italy.
- Figures relate to different time periods so comparisons should be treated with caution.

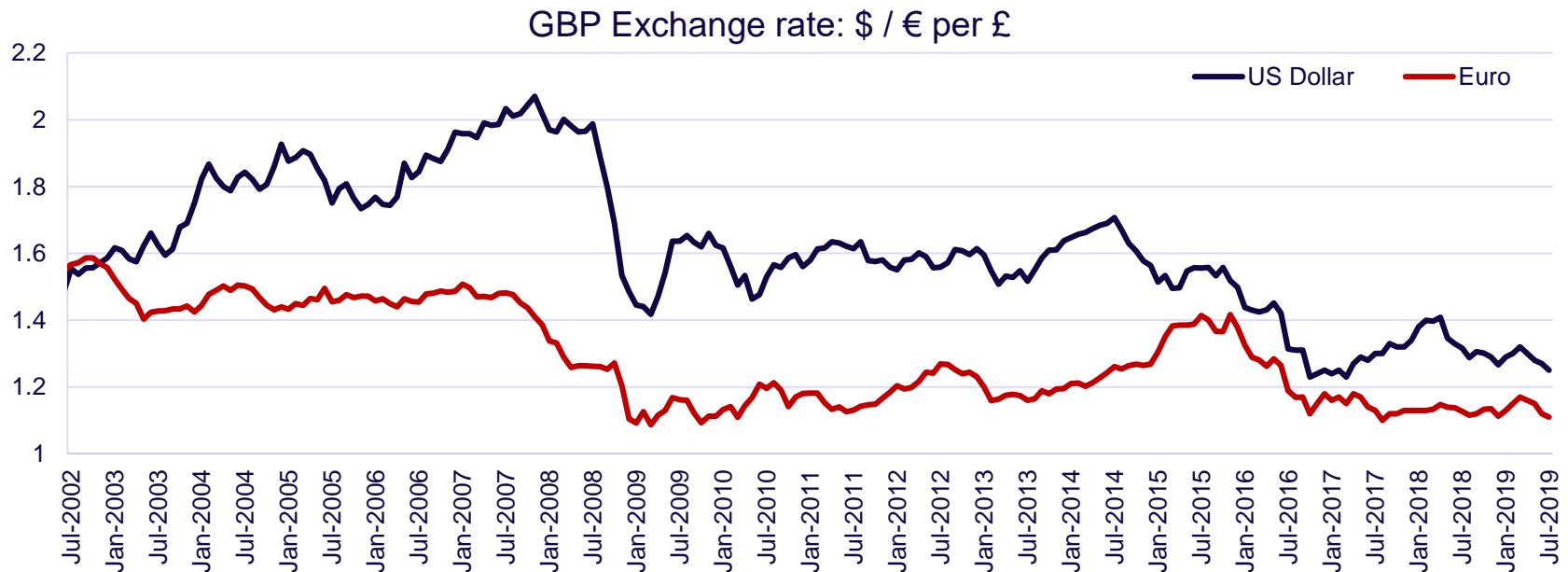
Destination	Growth in overseas visits	Period (Jan 2018 to ...)
Turkey	22%	December
France	7%	December
Rep. of Ireland	7%	December
Netherlands	6%	December
Italy	6%	December
Australia	5%	December
Switzerland	4%	December
USA	4%	October
Germany	4%	December
Canada	1%	December
Spain	1%	December
UK	-4%	December

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. Data for early 2019 will be released by UNWTO in early September.

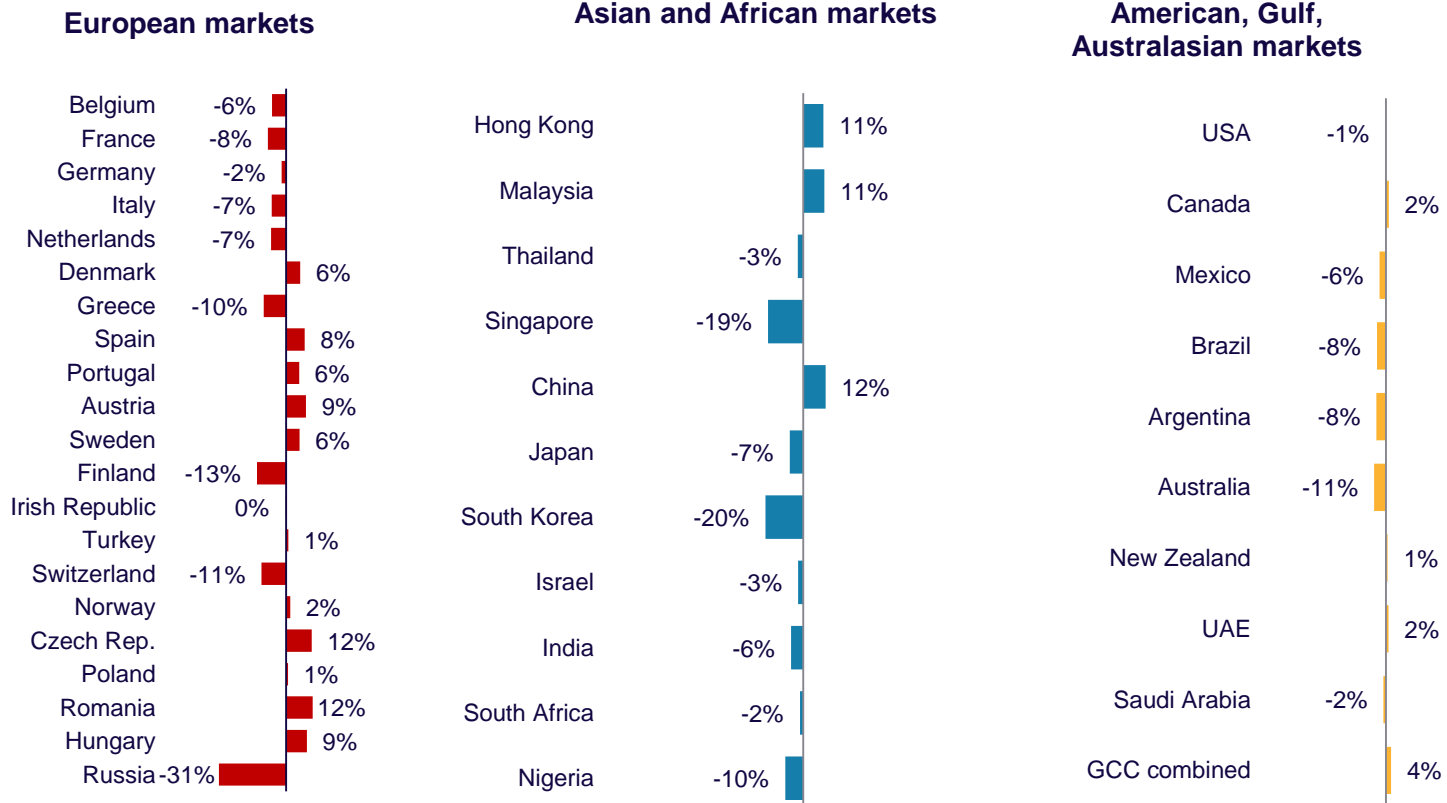
Exchange rates

- 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.
- 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 5% year on year at \$1.28 in May 2019. Against the euro, in May 2019, at €1.15, Sterling was 1% up compared to its value in May 2018, but 11% down compared to May 2016 (pre-referendum).
- In May 2019, Sterling was 3% up against the Australian dollar and against the Chinese Yuan, and on par with its value against the Canadian dollar compared to May 2018; but down 7% against the former two currencies and down 8% against the latter one, all compared to May 2016 respectively.



Individual markets – latest 12 month results

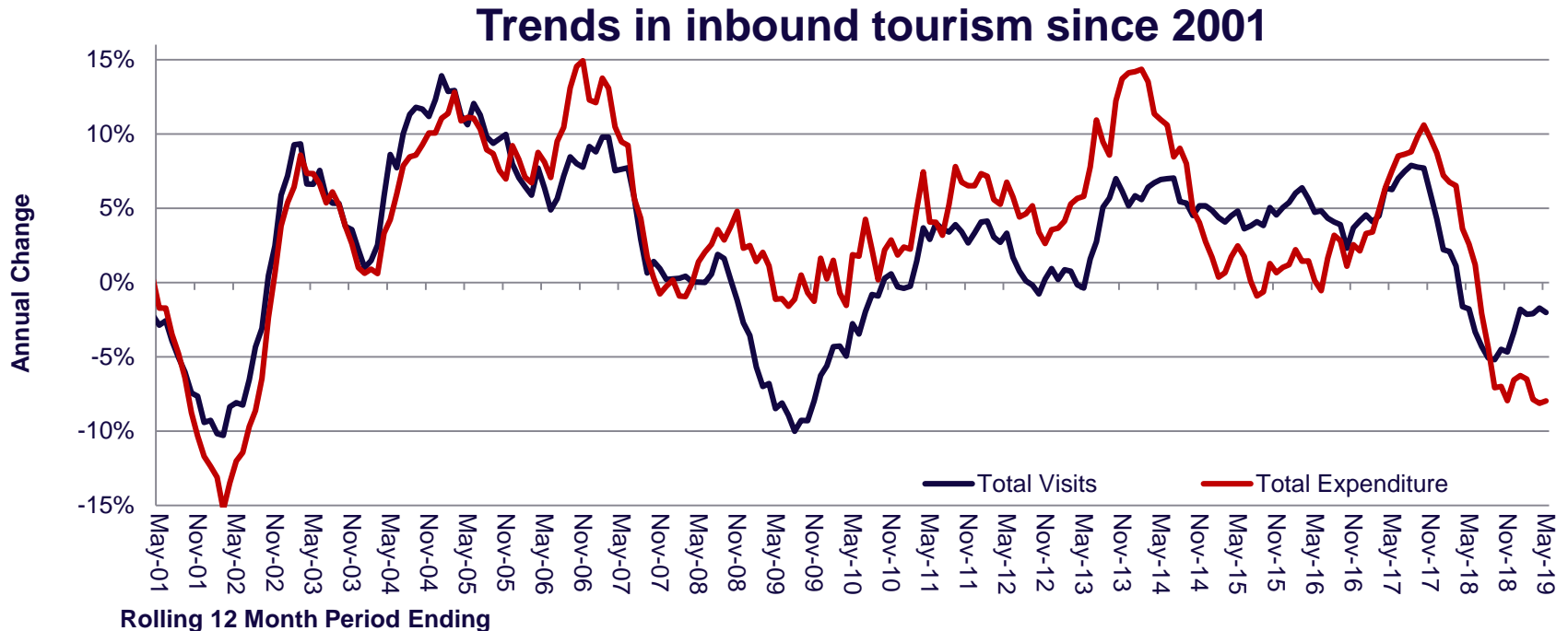
Using the latest available market level data, the following three charts show the percentage change in visits to the UK from a number of markets in the latest rolling year of data (the latest four quarters compared to the previous four quarters, in this case from **April 2018 – March 2019 v April 2017 – March 2018**).



More: Long term trends in visits from individual origin markets and world regions available [here](#).

Longer term trends

Visits and spend since 2001



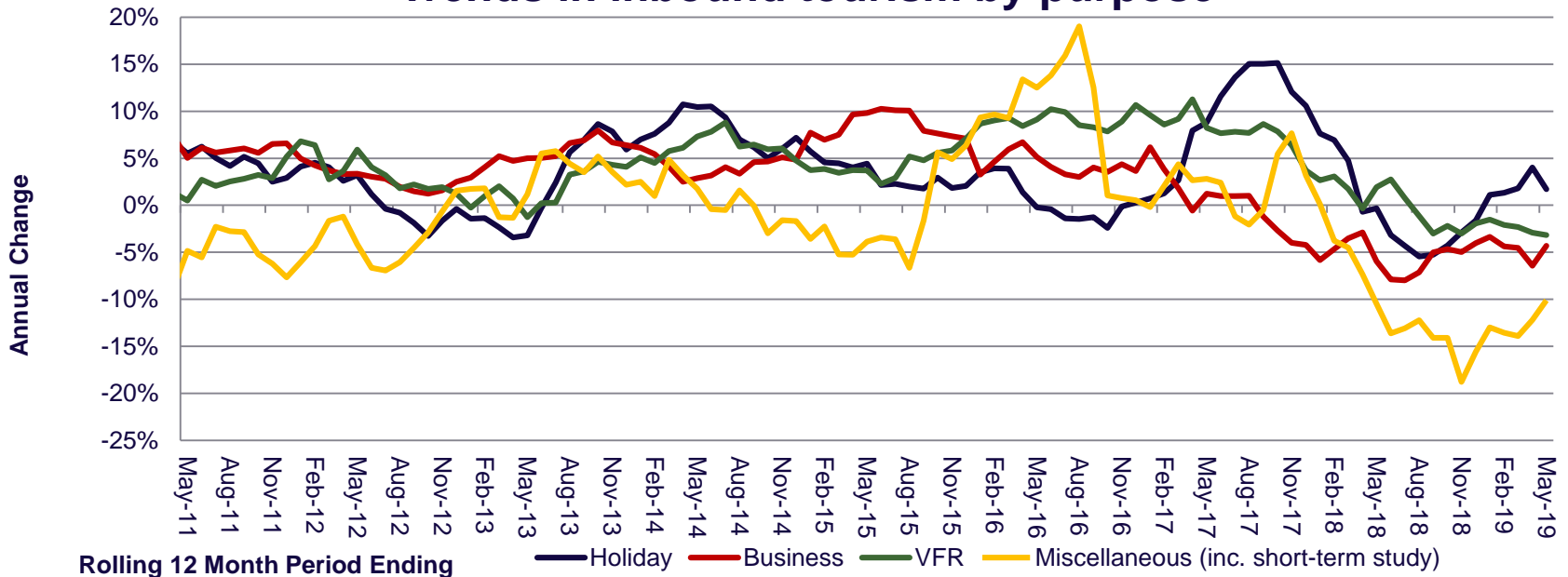
- This chart shows the year-on-year change in headline IPS results based on a 'rolling twelve-month' basis. Presenting the data in this way enables us to spot emerging trends and helps to 'smooth out' erratic results for any single month.
- This clearly illustrates the dip in inbound tourism seen post 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 that has continued into the first months of 2019.
- Whilst visits growth has remained positive in recent years, spend has fluctuated more. As of March 2019, visits in the last twelve months were tracking 2% down and spend 8% down with mostly sluggish month-on-month results across the most recent rolling twelve months.

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

Longer term trends

Journey Purpose

Trends in inbound tourism by purpose

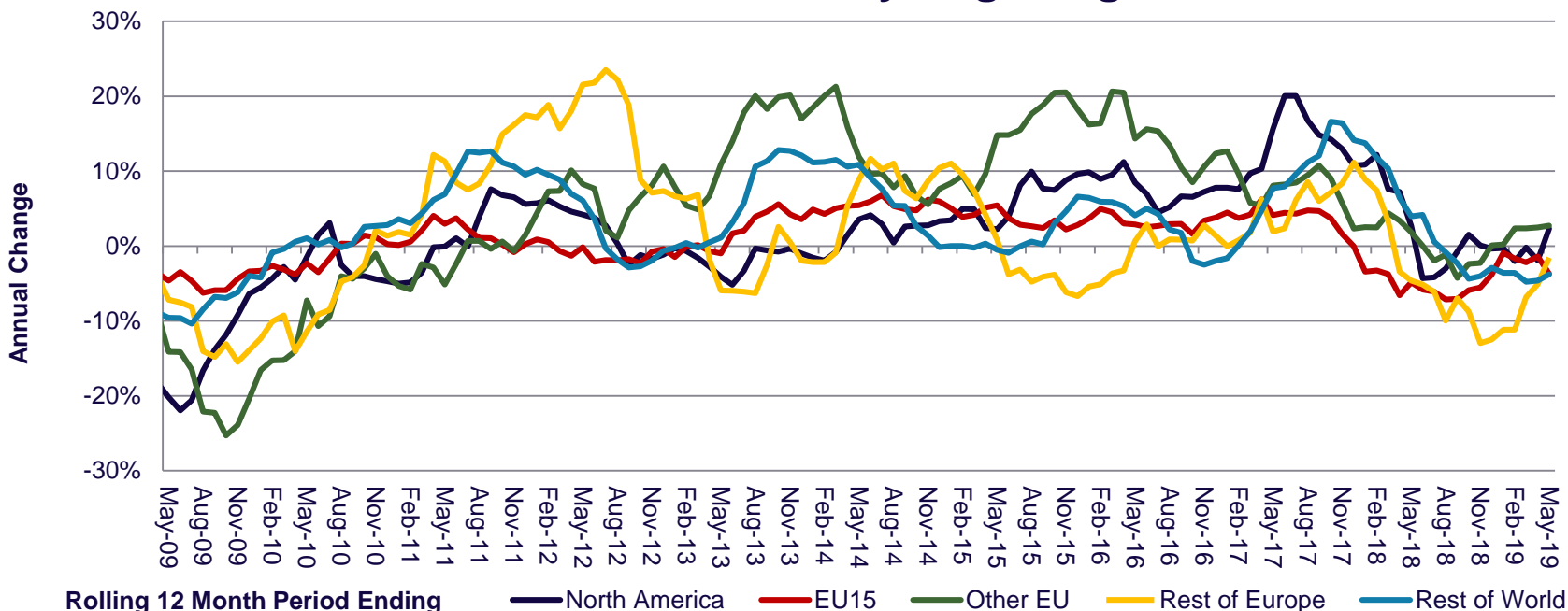


- By journey purpose holiday visits were far more resilient to the recession in the late 2000s and mostly have shown long term growth. There has been some variability in recent years. In the most recent 12 months, holiday visits were up 2%.
- After a significant downturn in 2009, business visits have 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 two years
- 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 and in the first months of 2019.
- Trips for other (miscellaneous) purposes account for a smaller number of visits and show the most variation with a downward trend since early 2018

Longer term trends

Global Region

Trends in inbound tourism by origin region since 2007

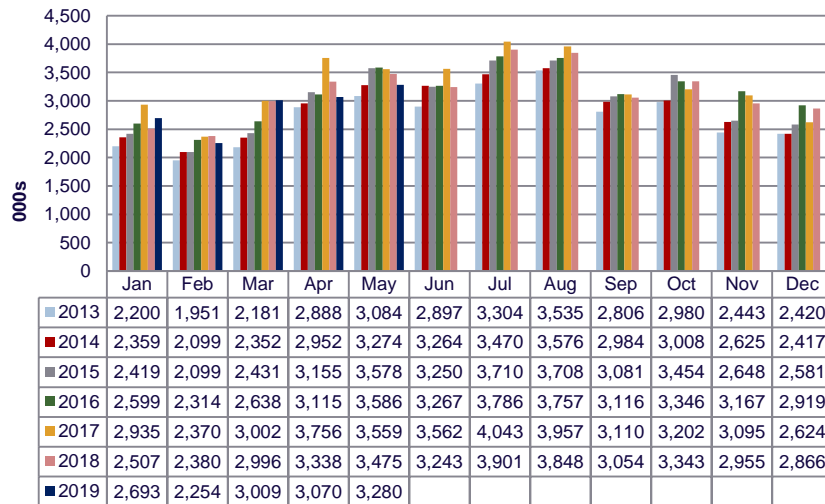


- This chart shows the longer term picture and the varying rates of recovery in visit numbers after the global financial crisis.
- Until 2017, visits from EU markets were growing at a steady pace, but they have slowed down since. Numbers in 2018 were down on 2017, with 2019 also seeing a decline so far. 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 and into 2019.
- Visits from North America grew strongly in 2017 and matched this level in 2018, with an increase seen in early 2019. Visits from the 'Rest of World' region were growing in 2017 but have been decreasing since mid-2018.

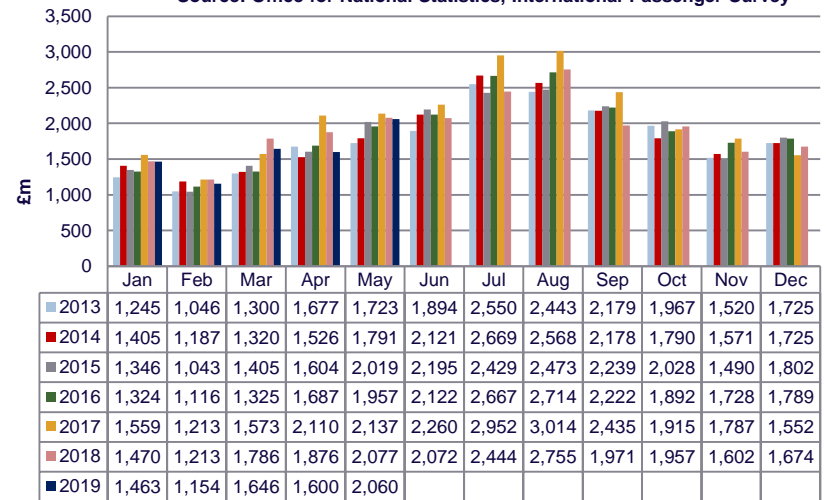
Detailed monthly trends

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



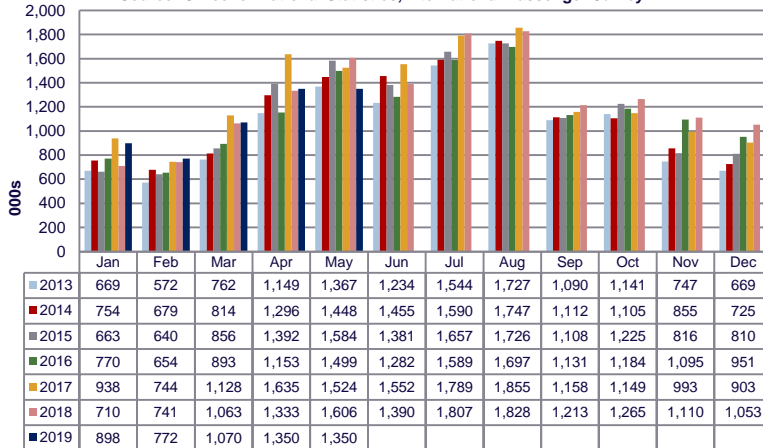
More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available [here](#)

Detailed monthly trends

Journey Purpose

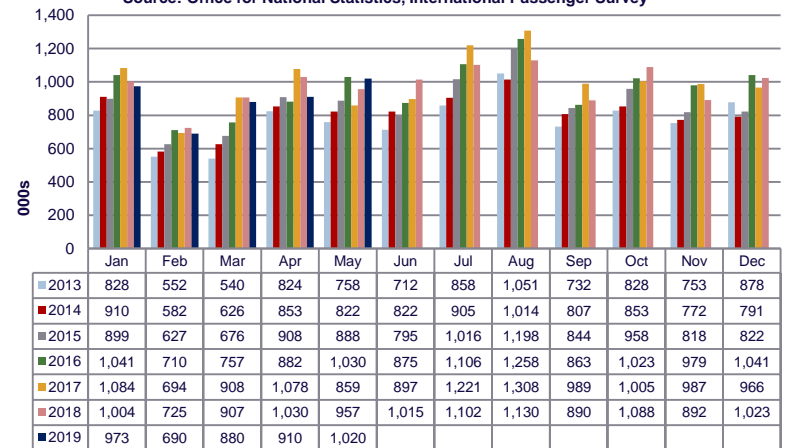
Overseas Visits to the UK - Holiday Visits

Source: Office for National Statistics, International Passenger Survey



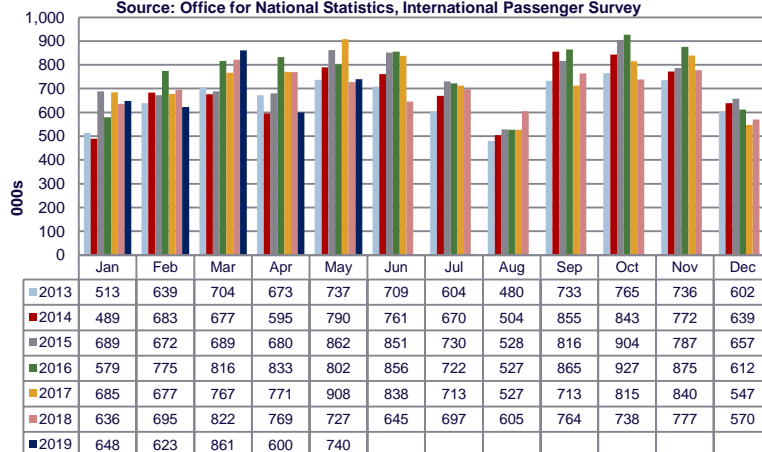
Overseas Visits to the UK - Visits to Friends and Relatives

Source: Office for National Statistics, International Passenger Survey



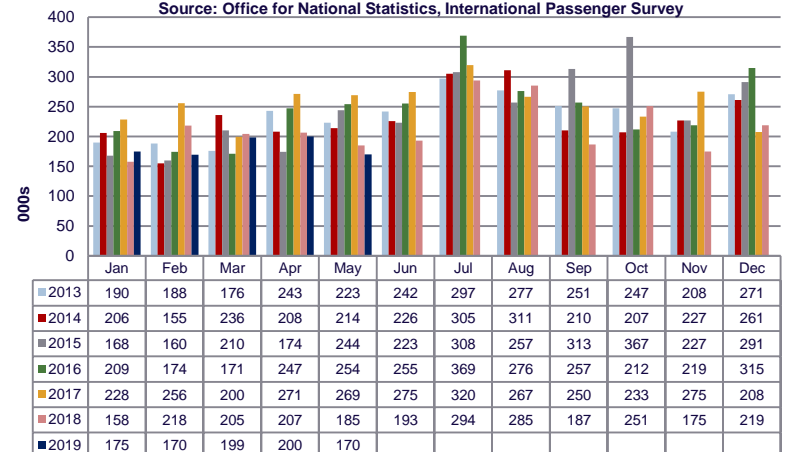
Overseas Visits to the UK - Business Visits

Source: Office for National Statistics, International Passenger Survey



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

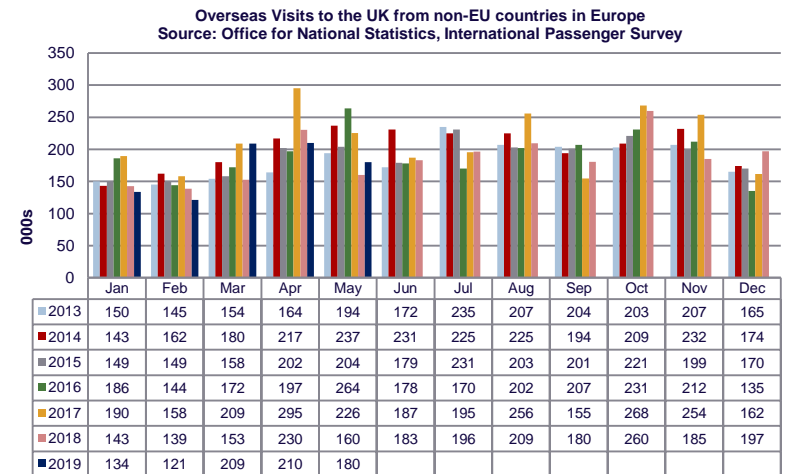
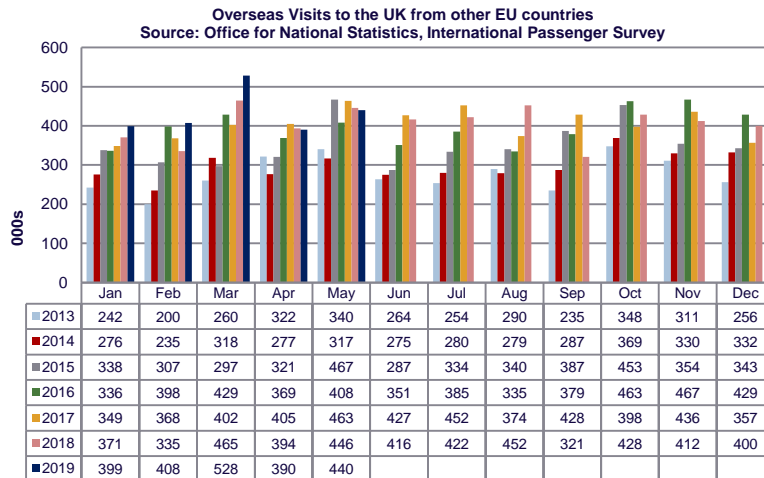
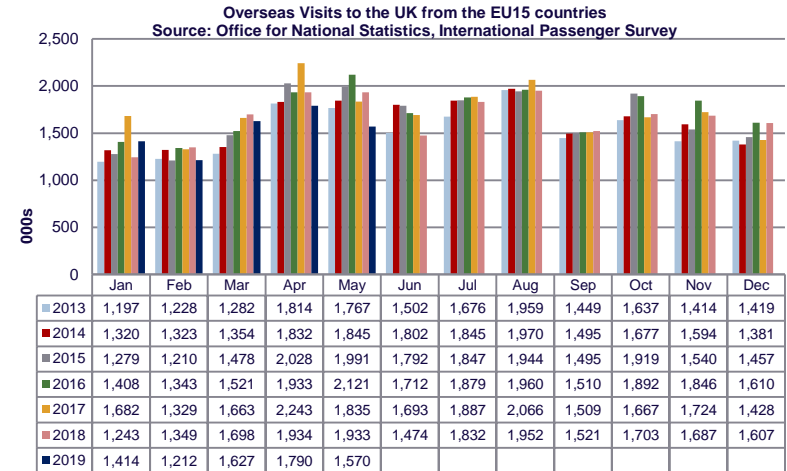
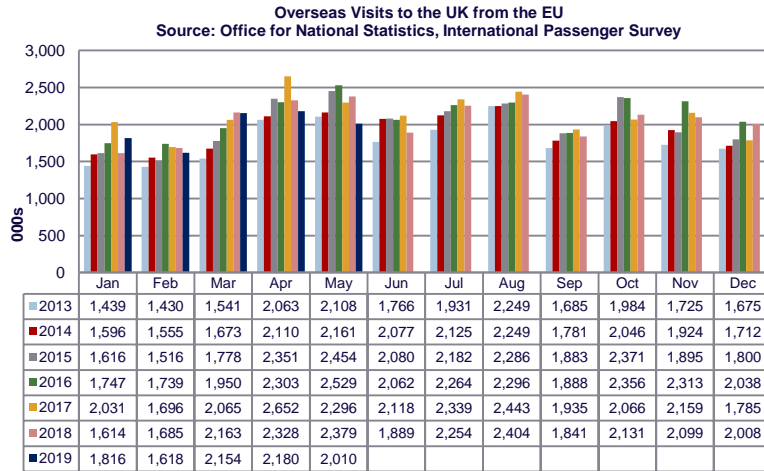
Source: Office for National Statistics, International Passenger Survey



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)

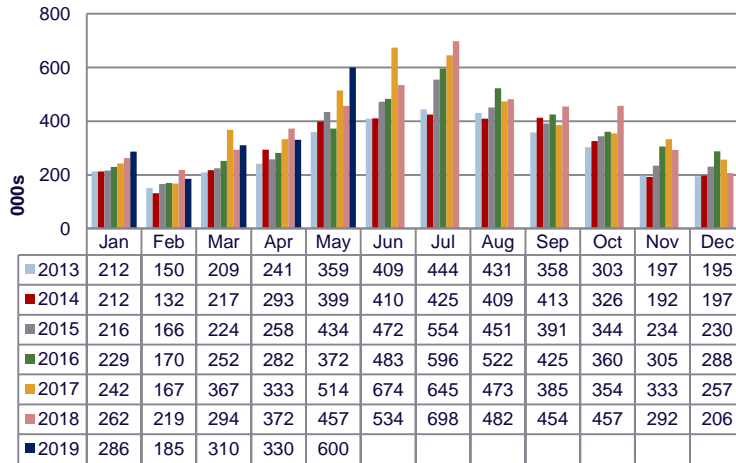


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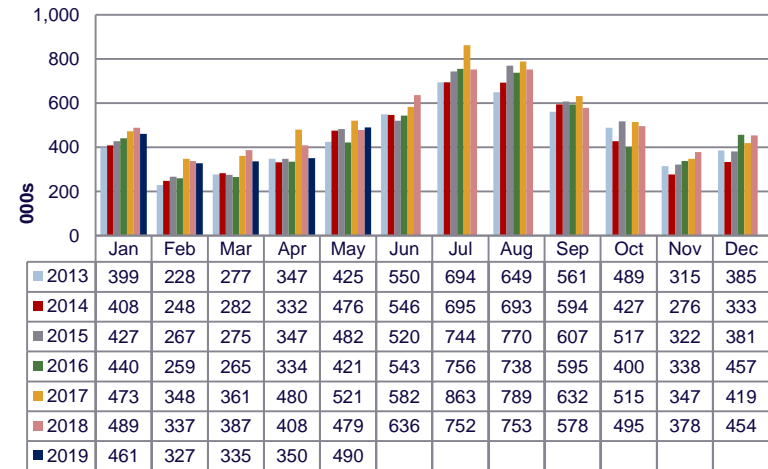
Detailed monthly trends

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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Monthly Inbound Update

May 2019 data