Inbound Tourism Trends Quarterly
Quarter 1 2019

August 2019

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 (April – June 2019) is scheduled for October 2019. This will provide data on visits by markets and UK region visited up to Q2 2019. The Annual Release for 2019, which will contain some revisions to the quarterly data, will be in the Spring of 2020.

When available the Inbound research & insights section of the VisitBritain website will contain much more detail including on visits to UK regions.

The data is based on interviews with a sample of departing visitors. The number interviewed varies but is typically around 3,000 per month. Please note that sample sizes at the quarterly level for some markets can be low and results should be treated with caution, especially for spending.

- All percentage changes in spend are nominal. All data is sourced from the International Passenger Survey by the Office for National Statistics.
- All figures quoted are not "seasonally adjusted".
- Numbers in some tables / charts may not sum due to rounding.

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

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, there were 1.4 billion international overnight tourism arrivals during 2018, up 5.6% on 2017.

Visits to Europe overall were up 6.1% and to the EU up 4.9%. Within Europe, there was variation with Northern Europe (which includes the UK) up 1%, Western Europe and Eastern Europe both up 6% and Southern Europe up 8%. Globally, the highest growth in visits to 2018 has been in Africa, where arrivals were up 7.0%, followed by Asia Pacific with 6.5%. Visits to the Americas were up by the weakest rate, 3.1%.

In 2019, UNWTO forecasts that international tourist arrivals will increase globally by 3-4% and also by 3-4% in Europe.

Continents	International tourist arrivals to region 2017 (millions)	International tourist arrivals to region 2018 (millions)	% Growth 2017 - 2018	% Growth Q1 2019
World	**1,329**	**1,403**	**5.6%**	**4.4%**
Europe	**674**	**713**	**6.1%**	**3.8%**
Asia Pacific	**323**	**345**	**6.5%**	**5.8%**
Americas	**211**	**217**	**3.1%**	**2.7%**
Africa	**63**	**67**	**7.0%**	**3.6%**
Middle East	**58**	**60**	**3.8%**	**8.2%**

Economic outlook

- **Eurozone:** there have been mixed signals recently. Growth in Q1 was up from the sluggish performance in the second half of 2018, although indications are that Q2 was slower. However, unemployment continues to ease down and wages are growing at their fastest pace in a decade.
- **USA:** The economy continued to perform well in Q1 and the labour market remains strong. The Federal Reserve cut interest rates in July in a bid to maintain growth. However, growth is forecast to ease throughout the year and into 2020. The trade war remains a risk.
- **China:** the GDP growth target continues to soften and the trade war is a source of downwards pressure, but the outlook is still for growth of around 6%.
- The **oil price** has been relatively stable recently, standing at around $65 at time of writing.

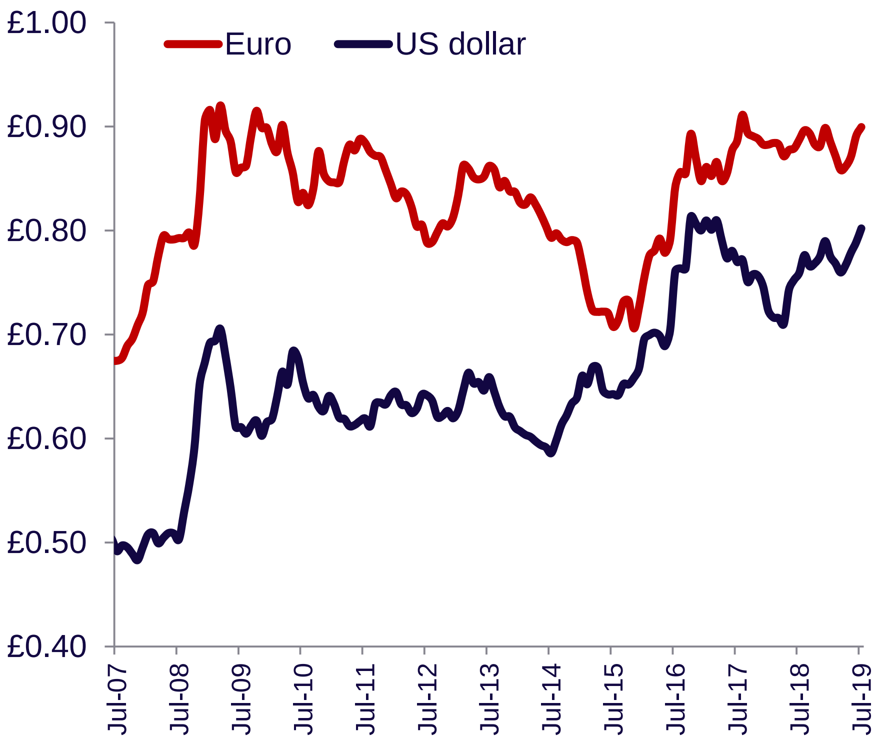
GDP growth	2018	2019	2020
Australia	2.8%	1.7%	2.6%
Canada	1.9%	1.2%	1.4%
France	1.7%	1.4%	1.5%
Germany	1.5%	0.9%	1.5%
Ireland	8.3%	4.0%	2.2%
Italy	0.7%	0.0%	0.4%
Netherlands	2.5%	1.5%	1.5%
Poland	5.2%	4.3%	3.2%
Spain	2.6%	2.3%	2.0%
Sweden	2.5%	1.8%	1.9%
Switzerland	2.6%	1.2%	1.7%
UK	1.4%	1.3%	1.5%
USA	2.9%	2.6%	1.8%
Brazil	1.1%	0.5%	1.9%
China	6.6%	6.2%	5.9%
India	7.4%	6.8%	7.1%
Russia	2.2%	1.0%	1.8%
World	**3.0%**	**2.7%**	**2.9%**

Source: Oxford Economics (IMF for World GDP growth)

Exchange rate

- The pound has fallen recently and reached €1.09 and $1.21 by early August, down from a high of €1.18 and $1.33 earlier in the year.
- Against the US dollar, the pound was down 5% year on year in July and is at its lowest level since early 2017. Against the euro, it was down 1% year on year and is at its lowest level since late 2017.
- Looking at Q1 2019, the pound averaged €1.15 and $1.30, up 1% year on year against the euro but down 6% against the dollar.

Value of US dollar and Euro against pound. Monthly averages to July 2019.



Source: Bank of England

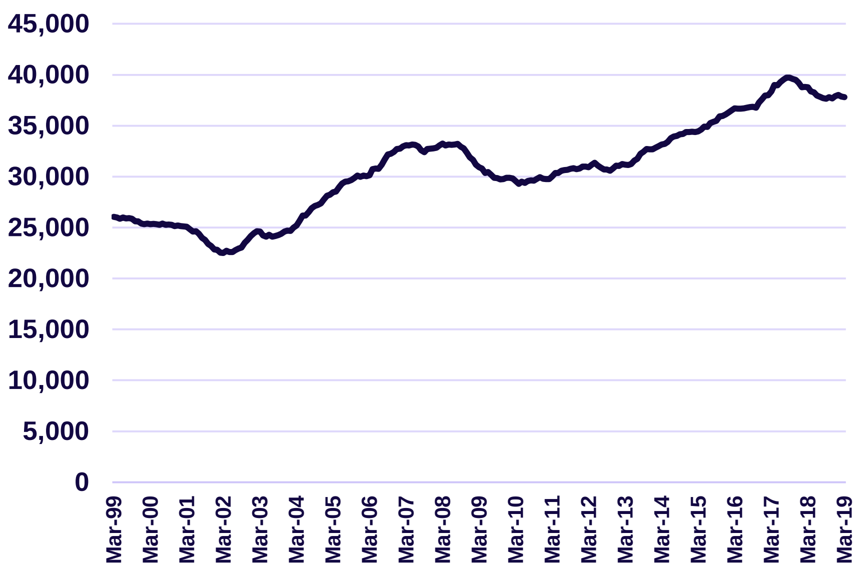
Visits and value trends by journey purpose, region visited and transport mode

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

- In Q1 2019, arrivals were up 1% compared to the same period in 2018. At 8.0 million visits, this is the second highest Q1 on record.
- The latest provisional data for March, our latest monthly results, show visits are down 2%.
- Looking at 12 month period to March 2019, visits are down 2%.

Inbound visits (000s), rolling year ending



	Visits (000s)	Growth
Q1 2019	7,957	1%
Latest full year (2018)	37,905	-3%
Latest monthly* (March 2019)	2,940	-2%
Rolling 12 months* (April 2018 – March 2019)	37,979	-2%

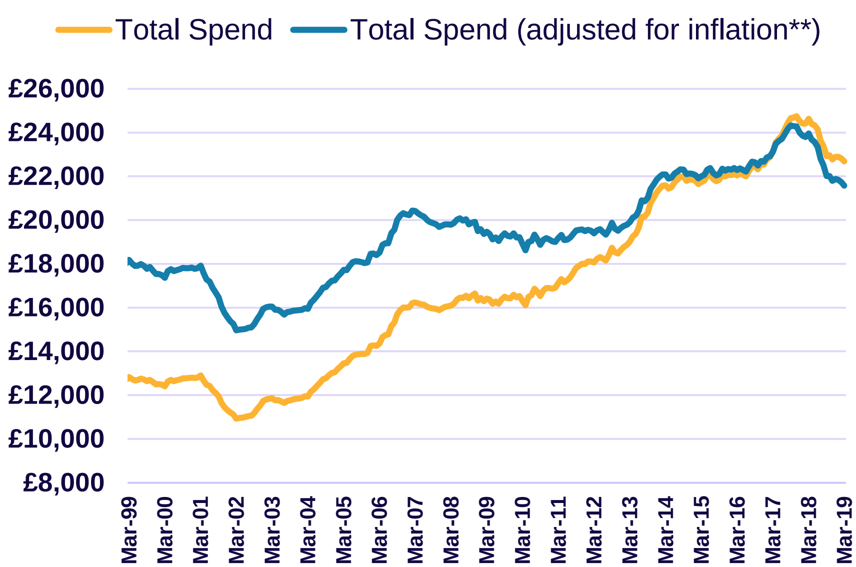
Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases

Inbound value

- 2018 finished with spending levels down 7% on the previous 2017 record.
- Q1 2019 spending decreased 5% in nominal terms to £4.3bn.
- Looking at the rolling 12 months, spend is down 8% on April 2017 – March 2018 spending levels.
- Since the EU referendum the value of GBP has fallen significantly meaning that the UK is now much more affordable for many visitors.

Inbound spend (£m), rolling year ending



	Spend (£m) Nominal terms	Growth
Q1 2019*	£4,262	-5%
Latest full year (2018)	£22,897	-7%
Latest monthly* (March 2019)	£1,650	-8%
Rolling 12 months* (April 2019 – March 2019)	£22,690	-8%

Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases; **Adjusted for inflation based on June 2019 price level

Journey Purpose trends

Holiday visits and spend in Q1 2019 were both up on Q1 2018. Visits were up 9% to 2.7 million, the second highest figure recorded for the first quarter of any year. Spend rose 12% to £1.8 billion, a new Q1 record for holiday spend.

Journeys to visit friends or relatives **(VFR)** fell by 3% to 2.5 million whilst spend fell by 18%, from the record Q1 2018, to £1.1 billion.

Business visits fell 1% to 2.1 million. Spending fell 11% from Q1 2019's record to £1.1 billion.

Visits for **miscellaneous purposes** (including study) fell by 6% to 543,000 with spending down 10% to £334 million.

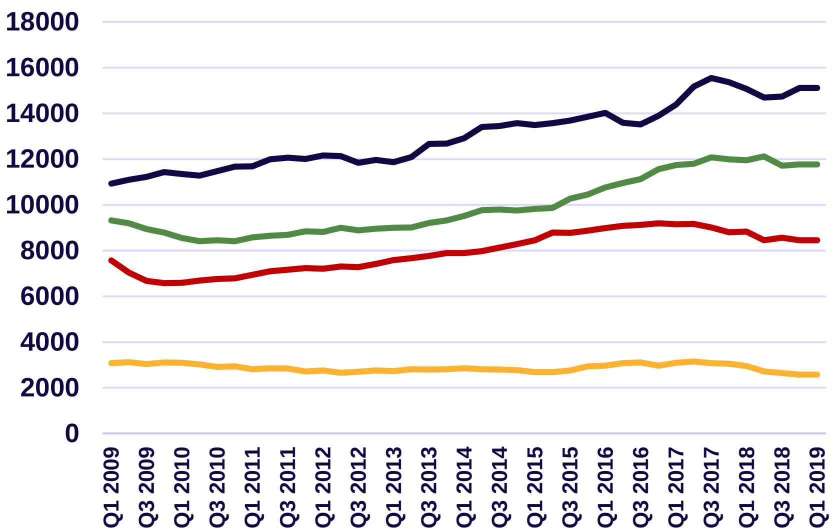
% change in visits 2018 v 2017

Holiday	Business	VFR	Misc.
-2%	-4%	-2%	-16%

% change in spend 2018 v 2017

Holiday	Business	VFR	Misc.
-3%	-15%	-3%	-14%

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



	Latest full year (2018)		Rolling 12 months (Apr 19 – Mar 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Holiday	15,119	£10,352	15,345	£10,548
Business	8,448	£4,512	8,426	£4,380
VFR	11,763	£5,665	11,671	£5,435
Misc.	2,576	£2,316	2,538	£1,183

Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases

Transport mode

Travel via **air** dipped 3% in 2018, with decreases across the first 3 quarters. Q1 2019 saw a 1% increase on those travelling by air whilst spend saw a 5% decrease.

Visits to the UK via **tunnel** fell 7% in 2018 whilst spend rose 1%. The decline in visits is linked to a decline in visits from France in 2018. Q1 2019 saw visits increase 1% and spend decrease 16% for those travelling by tunnel.

Visits to the UK departing via the **sea** fell 5% in 2018. Spending was up 2%, with a strong Q2 and Q4. Q1 2019 has been strong for both visits and spend for those travelling by sea.

% change in visits 2018 v 2017

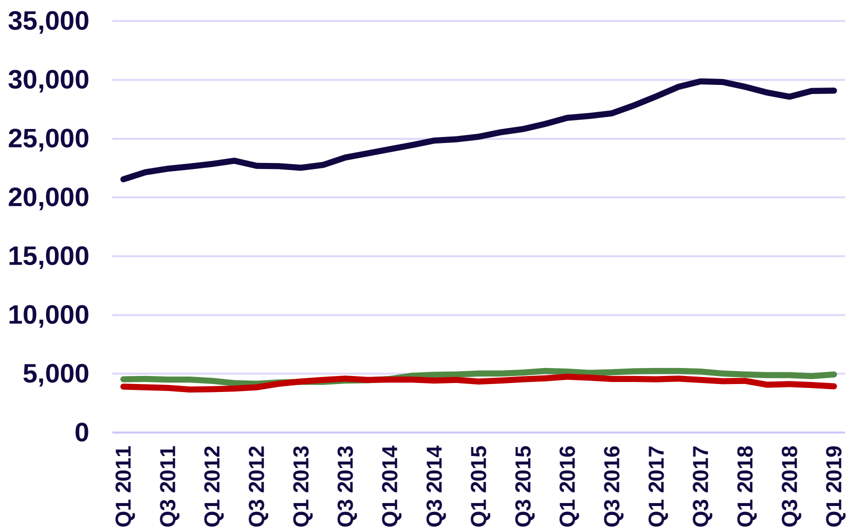
-3% -7% -5%

% change in spend 2018 v 2017

-8% 1% 2%

Air Tunnel Sea

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



	Latest full year (2018)		Rolling 12 months (Apr 19 – Mar 18*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Air	29,057	£19,686	29,097	£19,470
Tunnel	4,806	£1,530	4,937	£1,593
Sea	4,042	£1,680	3,944	£1,627

Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases

VisitBritain

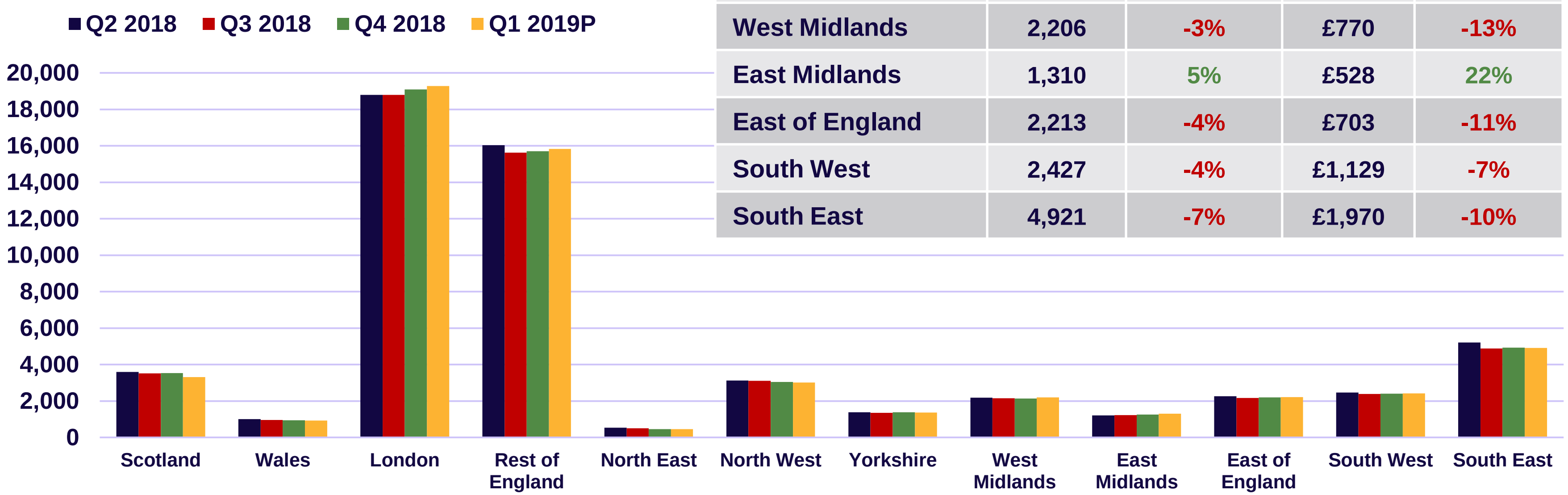
Area visited

Almost all regions of the UK experienced negative growth in visits in the 12 month period to March 2019, with growth only from **East Midlands** (up 5%). The biggest declines can be seen in the **North East** (-17%) and **Wales** (-11%).

There was positive growth for spend in **Wales** (2%), **North East** (5%), **Yorkshire** (2%) and **East Midlands** (22%) in the rolling 12 months to March 2019.

Rolling 12 months (Apr 18 – Mar 19)	Visits (000s)	Growth	Spend (£ mill)	Growth
Total UK	37,979	-2%	£22,690	-8%
Scotland	3,314	-3%	£2,063	-15%
Wales	934	-11%	£390	2%
London	19,280	-1%	£12,470	-7%
Rest of England	15,840	-3%	£7,301	-7%
North East	465	-17%	£270	5%
North West	3,016	-6%	£1,340	-14%
Yorkshire	1,366	0%	£581	2%
West Midlands	2,206	-3%	£770	-13%
East Midlands	1,310	5%	£528	22%
East of England	2,213	-4%	£703	-11%
South West	2,427	-4%	£1,129	-7%
South East	4,921	-7%	£1,970	-10%

Inbound visits by area visited, rolling 12 months (000s)



Source: International Passenger Survey

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.

Latest quarterly data: selected markets

- **Australia:** it was a weak Q1 for Australia with visits seeing a decline of 22%.
- **Brazil:** visits increased 6% in Q1 2019, setting a new Q1 record of 79,000.
- **China:** visits reached 69,000, a new record.
- **France:** visits were down 9%, the second consecutive year of decline in Q1 from France.
- **Germany:** visits were up 9% on Q1 2018, though not to a new record.
- **GCC:** visits were up 9% to a new record of 177,000.
- **India:** visits were up 25% reaching 90,000 visits, the second highest Q1 on record for India.
- **Italy:** visits were down 18% on the Q1 2018 record.
- **Romania:** a new record was set in Q1 2019 with visits up 33% to 294,000.
- **Spain:** visits were up 3% to 609,000 visits (second highest Q1 on record).
- **USA:** visits were up 1% to 653,000 whilst spend fell 9% on the Q1 2018 record.

Q1 2019	Visits (000s)	Growth	Spend (£m)	Growth
Australia	130	-22%	£124	-28%
Belgium	200	-23%	£51	-46%
Brazil*	79	6%	£69	23%
Canada	129	-1%	£139	62%
China	69	1%	£123	28%
Denmark*	125	-15%	£54	-32%
France	869	-9%	£285	-9%
Germany	581	9%	£204	-22%
GCC**	177	9%	£382	6%
India	90	25%	£79	13%
Irish Republic	638	8%	£205	-7%
Italy	348	-18%	£175	1%
Japan*	57	-21%	£38	-37%
Netherlands	374	-2%	£108	-17%
Norway	117	11%	£61	5%
Poland	530	12%	£116	16%
Portugal*	141	70%	£53	75%
Romania	294	33%	£123	19%
Spain	609	3%	£216	-4%
Sweden	179	21%	£70	-23%
Switzerland	175	15%	£97	6%
UAE	75	0%	£121	22%
USA	653	1%	£581	-9%

Source: International Passenger Survey

*Base size below 100

***GCC includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE*

2019 figures are provisional and will be revised with the next quarterly and annual releases. Please note that base sizes by market at the quarterly level can be small and spend data in particular should be treated with caution.

North West Europe

North West Europe provides some of our highest levels of visits to the UK. Visits from **France** declined throughout all of 2018 and have continued to decline 9% in Q1 2019. This has been the second consecutive Q1 we have seen a decline from France.

Visits from **Irish Republic** were down 8% whilst spend was down 5% in 2018. Q1 2019 has started off positively with visits up 8%.

Belgium: spend was up 1% in 2018 whilst visits were down 3%. Q1 2019 was a weak start for Belgium with visits down 23%.

In 2018, both visits and spend from **Netherlands** were down on the 2017 record year. Q1 2019 has been weak with visits down 2%.

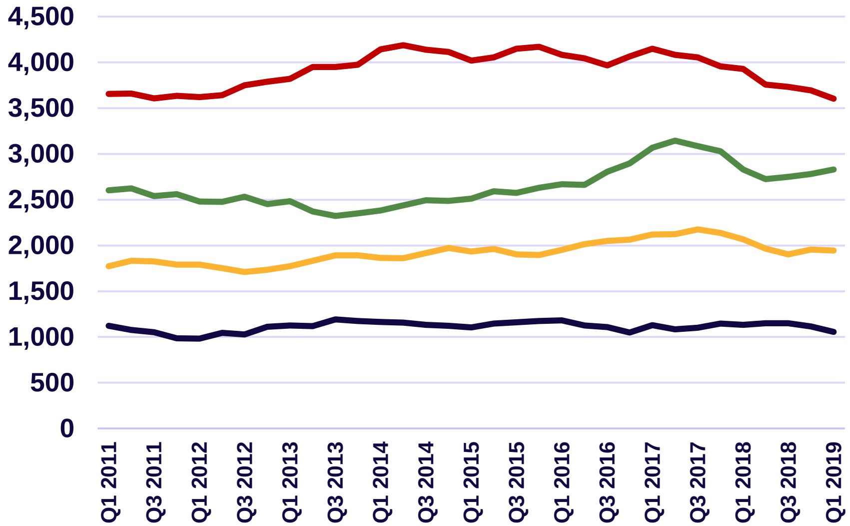
% change in visits 2018 v 2017

Belgium	France	Irish Rep	Netherlands
-3%	-7%	-8%	-9%

% change in spend 2018 v 2017

Belgium	France	Irish Rep	Netherlands
+1%	-3%	-5%	-4%

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



	Latest full year (2018)		Rolling 12 months (Apr 18 – Mar 19*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Belgium	1,116	£399	1,056	£357
France	3,693	£1,386	3,603	£1,358
Irish Republic	2,782	£895	2,830	£881
Netherlands	1,954	£716	1,946	£695

Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases

Central Europe

Visits from **Germany** fell 4% in 2018 on the 2017 record. Similarly, spending was down 4% in 2018 on the record 2017. Q1 2019 visits were up 5%.

Visits from **Switzerland** decreased 18% in 2018 whilst spend was down 21%. Q1 2019 has seen a positive start with visits up 15%.

Visits from **Austria** were up 5% in 2018, setting a new record at 322,000. Spend decreased 21% on the 2017 record. Q1 2019 has started off positively with visits setting a new record of 66,000.

% change in visits 2018 v 2017

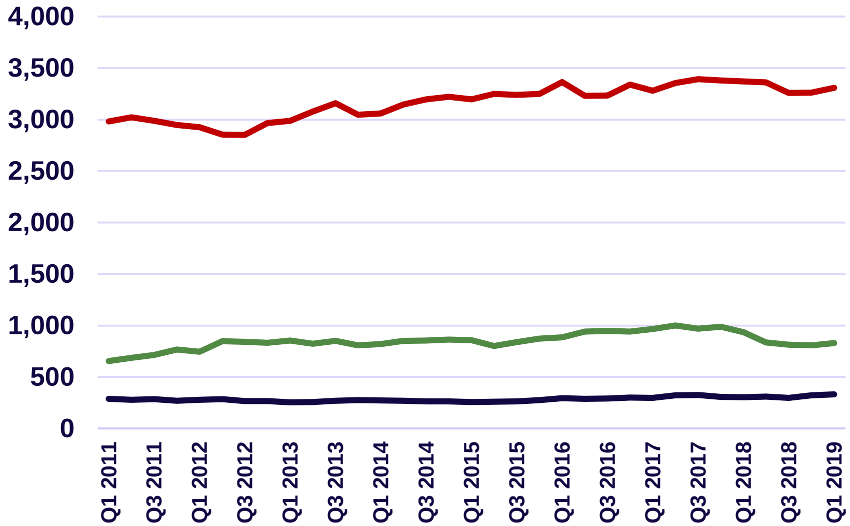
+5% -4% -18%

% change in spend 2018 v 2017

-21% -4% -21%

Austria Germany Switzerland

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



	Latest full year (2018)		Rolling 12 months (Apr 18 – Mar 19*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Austria	322	£147	333	£157
Germany	3,262	£1,520	3,307	£1,462
Switzerland	808	£147	831	£466

Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases

Southern Europe

Spain reached record levels for both spend and visits in 2018, even climbing one place up in the spend ranking to become the 4th most valuable inbound market. In Q1 2019, there were 3% more visits than in Q1 2018.

Visits from **Italy** in 2018 were up 2% YoY, but spend down 7%. Visits in Q1 2019 were down 18% on the record set in 2018.

In 2018, **Portugal** struggled with both visits and spend down YoY. However, the first months of 2019 showed signs of recovery with a new Q1 visits record.

Visits from **Greece** fell 6% in 2018 vs 2017. With negative results for each of the quarters in 2018, spend was also down YoY, -18% in 2018.

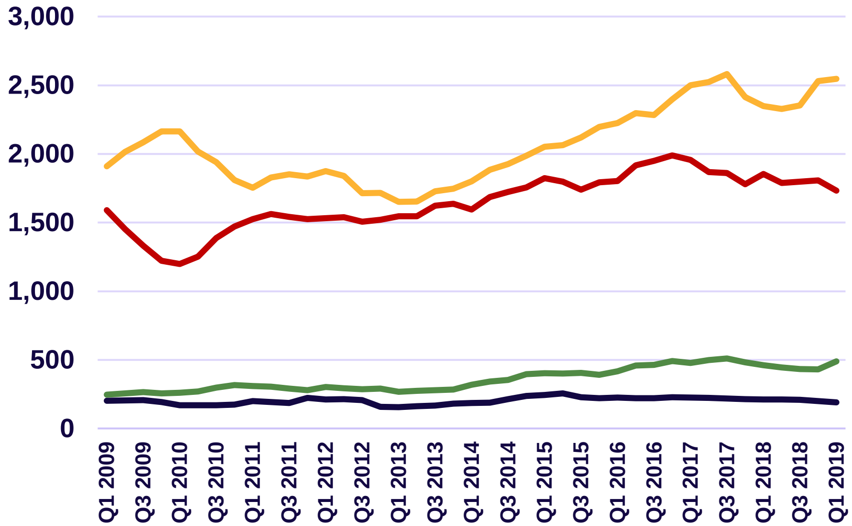
% change in visits 2018 v 2017

Greece	Italy	Portugal	Spain
-6%	+2%	-11%	+5%

% change in spend 2018 v 2017

Greece	Italy	Portugal	Spain
-18%	-7%	-21%	+5%

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



	Latest full year (2018)		Rolling 12 months (Apr 18 – Mar 19*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Greece	200	£115	190	£126
Italy	1,808	£784	1,733	£786
Portugal	431	£163	489	£186
Spain	2,530	£1,110	2,547	£1,102

Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases

Nordics

Denmark saw a 1% increase in visits in 2018 and a 6% increase in spend year-on-year (YoY). However, visits decreased in Q1 2019 (-15%).

Despite visits from **Norway** being 5% down on the year before in 2018, spend was 4% up. Q1 2019 saw YoY growth in visits (+11%).

Visits from **Sweden** was flat in 2018 and spend was slightly down compared to 2017. Visits were up 21% YoY in Q1 2019.

Finland, the smallest of these markets, recorded a dip in 2018 for visits (-17% YoY) and spend (-8% YoY). Visits were 9% up YoY in Q1 2019.

% change in visits 2018 v 2017

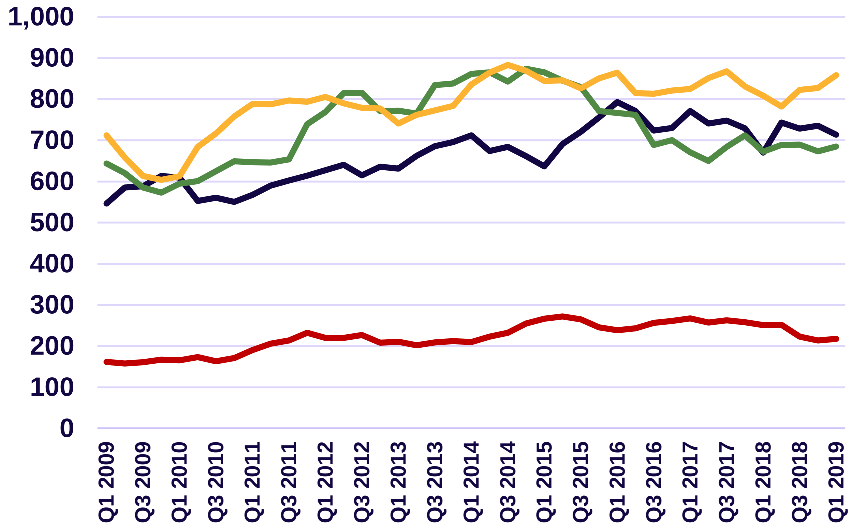
+1% **-17%** **-5%** **0%**

% change in spend 2018 v 2017

+6% **-8%** **+4%** **-1%**

Denmark **Finland** **Norway** **Sweden**

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



	Latest full year (2018)		Rolling 12 months (Apr 18 - Mar 19*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Denmark	735	£379	714	£354
Finland	214	£114	218	£111
Norway	673	£394	685	£397
Sweden	827	£447	859	£426

Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases

Eastern Europe

Visits from **Poland** grew by 1% in 2018 compared to 2017, and spend by 15%, not setting new records though. Q1 2019 saw a 12% in visits, compared to Q1 2018, to a new record of 530,000.

Both visits from **Romania** and spend set new records in 2018, and in Q1 2019 growth in visits continued with an increase on Q1 2018 of 33%.

Visits from **Czech Republic** grew year-on-year in both 2018 and Q1 2019, although spend fell 8% in 2018.

Hungary: visits were up 5% in 2018 and spend up 1%, both setting new records. Visits continued growing rapidly in Q1 2019.

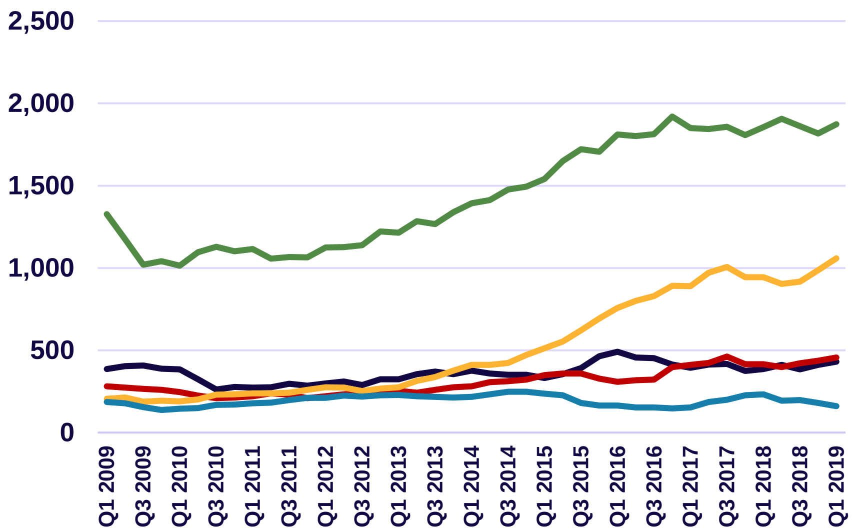
After strong 2017 results, visits from **Russia** showed large declines in both 2018 and Q1 2019.

% change in visits 2018 v 2017

% change in spend 2018 v 2017

	Czech Rep	Hungary	Poland	Romania	Russia
% change in visits 2018 v 2017	+10%	+5%	+1%	+5%	-20%
% change in spend 2018 v 2017	-8%	+1%	+15%	+60%	-18%

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



	Latest full year (2018)		Rolling 12 months (Apr 18 - Mar 19*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Czech Rep	412	£121	432	£119
Hungary	437	£138	456	£133
Poland	1,817	£453	1,873	£469
Romania	987	£479	1,060	£498
Russia	181	£153	161	£117

Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases

English-speaking long-haul

Despite both visits and spend falling in 2018 vs 2017, the **USA** overtook France to become the largest inbound market in visits terms, and remained first by value. Q1 2019 visits were up by a modest 1% year-on-year (YoY).

Visits from **Canada** in 2018 were up YoY, and spend reached a record £676 million. Q1 2019 visits were down 1% YoY.

Visits from **Australia** and inbound spend slowed down in 2018 compared to a strong 2018. The market remains the 10th largest by inbound visits though. Q1 2019 also saw a dip in visits (-22%) YoY.

There were 2% fewer visits from **New Zealand** in 2018 vs 2017, but spend reached a new record with £255 million spent in 2018.

% change in visits 2015 v 2016

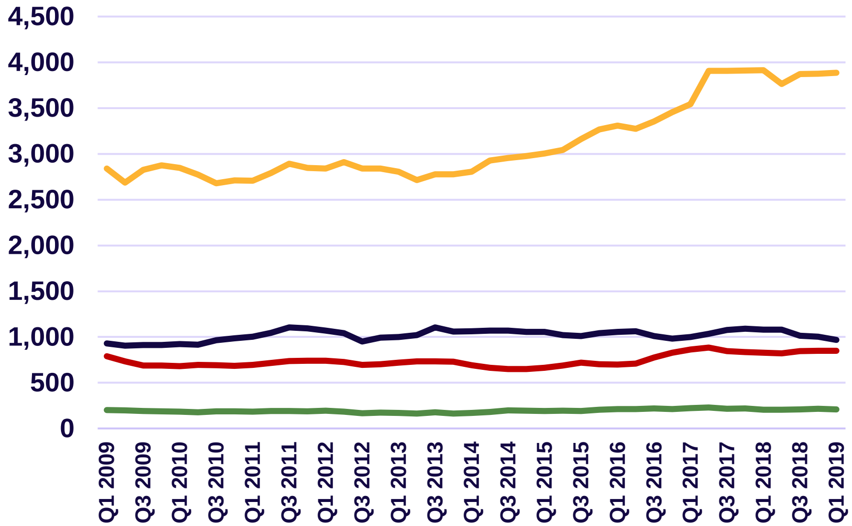
-8% | +2% | -2% | -1%

% change in spend 2015 v 2016

-13% | +12% | +19% | -7%

Australia | Canada | New Zealand | USA

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



	Latest full year (2018)		Rolling 12 months (Apr 18 - Mar 19*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Australia	1,003	£1,044	967	£996
Canada	850	£676	849	£729
New Zealand	216	£255	209	£241
USA	3,877	£3,378	3,885	£3,322

Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases

Advanced Asia

Hong Kong: visits and spend continue growing. 2018 reached new records for both with 243,000 visits and £385 million spent. Q1 2019 visits were also up 10% year-on-year (YoY).

Visits from **Japan** in 2018 were on par with 2017, whilst spend was up 13%. However, visits were down YoY in Q1 2019.

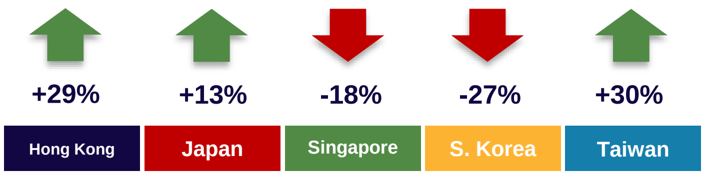
Singapore saw a dip in both visits and spend in 2018 (-22% and -18% on 2017 respectively). Visits were recovering in Q1 2019, up 22% YoY.

Similarly, visits from **South Korea** decreased 17% YoY in 2018 and spend by 27%. Visits were also down in Q1 2019 YoY.

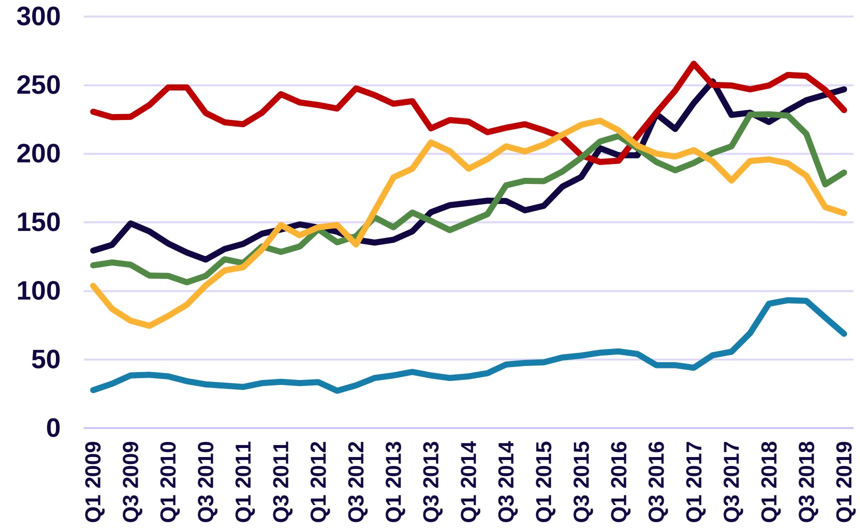
Despite figures being more volatile for Taiwan, both visits and spend in 2018 were up on the year before, with visits reaching a new record.

% change in visits 2018 v 2017

% change in spend 2018 v 2017



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



	Latest full year (2018)		Rolling 12 months (Apr 18 - Mar 19*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Hong Kong	243	£385	247	£417
Japan	247	£282	232	£260
Singapore	178	£219	186	£211
South Korea	161	£134	157	£139
Taiwan**	81	£85	69	£75

Source: International Passenger Survey

*2019 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** increased 3% in 2018 compared to 2017, reaching a new record of 391,000 visits. Those visitors spent less than in 2017 though. Visits increased to record setting levels in Q1 2019, up 1% year-on-year (YoY).

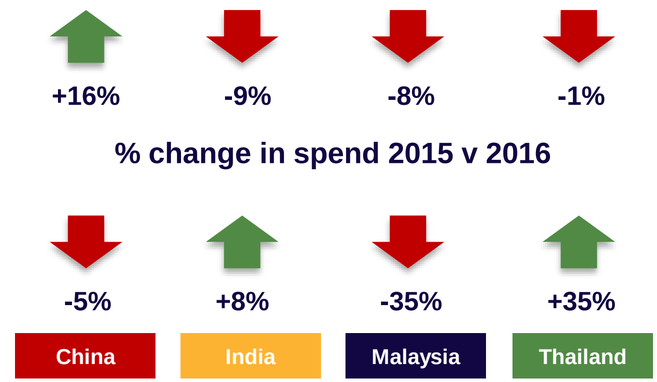
India reached record level of inbound spending in 2018 with £491 million spent in the UK, up 8% on 2017, whilst visits decreased by 9% on 2017. However, Q1 2019 tracked up 25% for visits YoY.

Both visits and spend from **Malaysia** were down in 2018 compared to 2017. Q1 2019 shows signs of recovery though with visits +60% YoY.

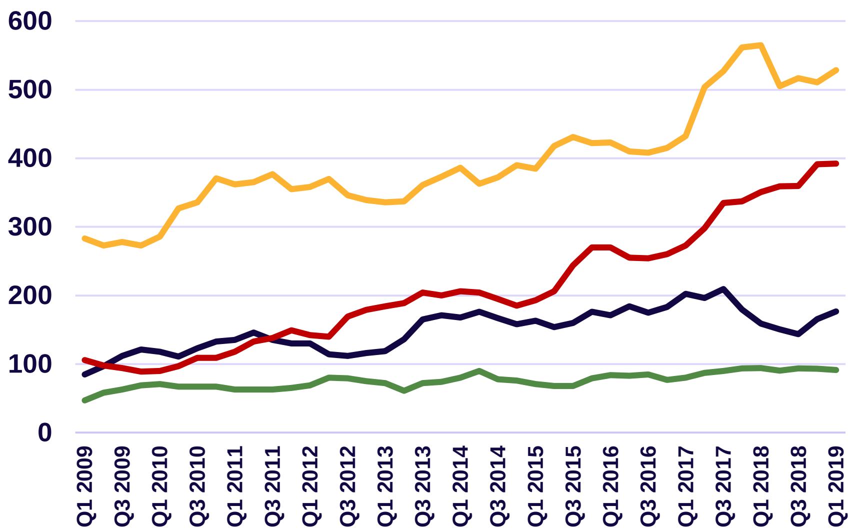
Thailand is a smaller inbound market, and visit numbers are more volatile. In 2018, visits were about on par with 2017 whilst spend reached a new record.

% change in visits 2015 v 2016

% change in spend 2015 v 2016



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



	Latest full year (2018)		Rolling 12 months (Apr 18 - Mar 19*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
China	391	£657	392	£684
India	511	£491	529	£500
Malaysia	165	£168	177	£173
Thailand	93	£147	91	£144

Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases

The Gulf

Despite a dip in visits in Q3 2018, visits from the **UAE** increased 5% in 2018 to a record 392,000 with spend about on par with the record 2017 spending levels. Q1 2019 visits were on par with Q1 2018.

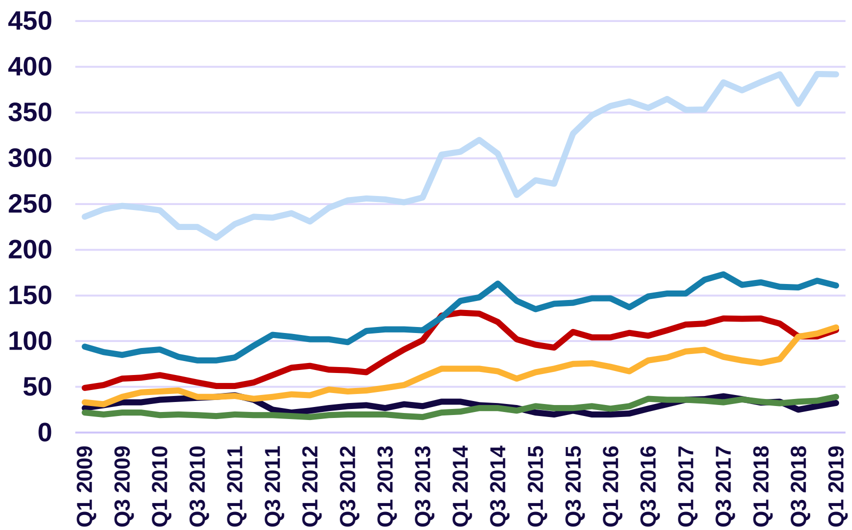
Saudi Arabia visits reached a new record in 2018, but spend halved compared to an exceptional 2017. Visits were down YoY in Q1 2019.

2018 saw both visits from **Kuwait** and spend dip. Q1 2019 shows some signs of recovery with visits up 22% YoY. Both visits and spend from **Qatar** reached new record in 2018, and so did visits in Q1 2019. Smaller markets **Bahrain** and **Oman** both saw visits and spend decrease in 2018.

% change in visits 2018 v 2017

	Bahrain	Kuwait	Oman	Qatar	Saudi Arabia	UAE
% change in visits 2018 v 2017	-21%	-15%	-3%	+37%	+3%	+5%
% change in spend 2018 v 2017	-13%	-31%	-21%	+19%	-51%	0%

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



	Latest full year (2018)		Rolling 12 months (Apr 18 - Mar 19*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Bahrain**	29	£81	32	£75
Kuwait	105	£273	112	£281
Oman**	35	£49	39	£53
Qatar	108	£228	115	£231
Saudi Arabia	166	£424	161	£415
UAE	392	£616	392	£638

Source: International Passenger Survey

*2019 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

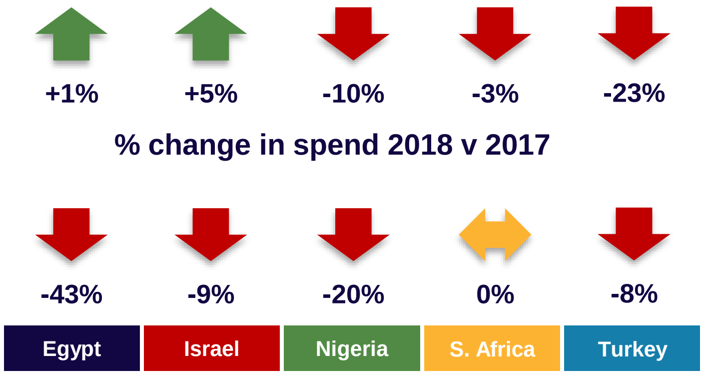
Nigeria: visits in 2018 were down 10% year-on-year (YoY); spend also decreased, by 20%. Visits in Q1 2019 continued to decrease YoY.

South Africa: visits struggled in 2018, down 3% YoY, while spending was on par with 2017. Q1 2019 saw visits decline again YoY.

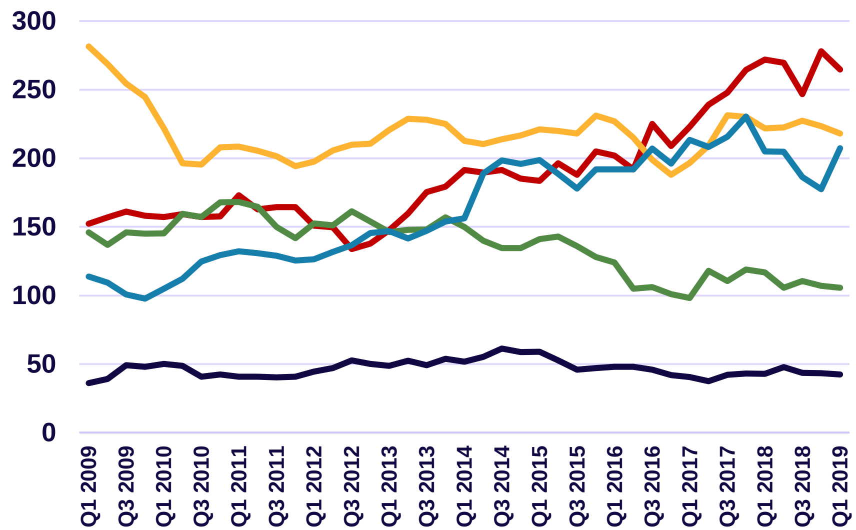
Visits from **Israel** reached a new record of 278,000 visits in 2018, though spend was 9% down. However, visits in Q1 2019 were down 19% YoY. Both visits from **Turkey** and spend were down YoY in 2018; Q1 2019 saw a new record for visits. Visits from **Egypt** were stable in 2018, but spend fell by almost half (-43% YoY).

% change in visits 2018 v 2017

% change in spend 2018 v 2017



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



	Latest full year (2018)		Rolling 12 months (Apr 18 - Mar 19*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Egypt**	43	£44	42	£54
Israel	278	£229	265	£249
Nigeria	107	£152	106	£150
South Africa	224	£260	218	£237
Turkey	177	£143	207	£150

Source: International Passenger Survey

*2019 figures are provisional and will be revised with the next quarterly and annual releases

**Sample size less than n=100

Latin America

Overall visits from **Brazil** were down 2% in 2018 compared to 2017, and spend also declined by 18%. Q1 2019 saw visits up 6% % on Q1 2018, on top of a strong Q1 2018, setting a new record.

Argentina, a smaller inbound market for the UK, has posted year-on-year (YoY) declines in each quarter since Q3 2018. As a consequence, visits in 2018 were down 6% and spend 17% in 2018 on record 2017 levels.

Mexico: visits and spend followed a similar trend: visits in 2018 were down 1%, and inbound spend -20%.

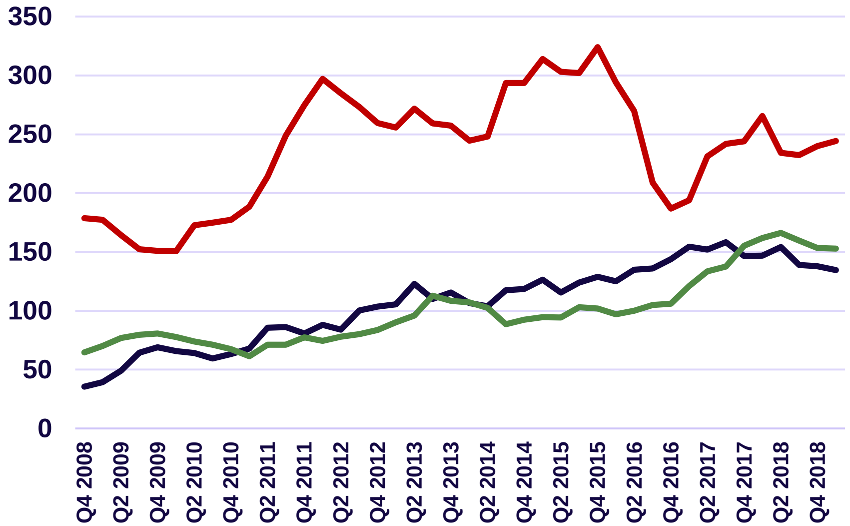
% change in visits 2018 v 2017

Argentina	Brazil	Mexico
-6%	-2%	-1%

% change in spend 2018 v 2017

Argentina	Brazil	Mexico
-17%	-18%	-20%

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



	Latest full year (2018)		Rolling 12 months (Apr 18 - Mar 19*)	
	Visits (000s)	Spend (£ mill)	Visits (000s)	Spend (£ mill)
Argentina	138	£146	135	£138
Brazil	240	£215	244	£227
Mexico	153	£81	153	£89

Source: International Passenger Survey

*2019 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

August 2019