

# Monthly Inbound Update June 2019

24<sup>th</sup> September 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).

June data were released on 24<sup>th</sup> September. The next monthly release will cover July data and is planned for 24<sup>th</sup> October.

The Quarterly Release for this period (Q2, April – June 2019), which may contain some revisions, is scheduled to be released on 25<sup>th</sup> 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 – June 2019 (provisional)

	June 2019 visits (000)	% change vs. Jun 2018	Last 3 months (Apr – Jun 19) visits (000)	% change vs. Apr - Jun '18	Year to date (Jan – Jun 19) visits (000)	% change vs. Jan - Jun '18	Rolling 12 months (Jul – Jun 19) visits (000)	% change vs. Jul '17 - Jun '18
All visits (000)	3,530	9%	9,880	-2%	17,840	-1%	37,800	0%
Spend (£ million)	2,340	13%	6,000	0%	10,260	-2%	22,670	-6%

- Visits:** The UK received 3.5 million overseas visits in June 2019, up 9% year-on-year (YoY) and just 1% behind the June 2017 record. As April and May were down YoY, inbound visits in the last three months were down 2% to 9.9 million, and visits from January to June 2019 were down 1% on the first six months of 2018. Overseas visits to the UK in the twelve months to June 2019 were on par with July 2017 – June 2018 with 37.8 million visits.
- Spending:** In June 2019, inbound visitors spent a record £2.3 billion, up 13% on June 2018. Thanks to those strong results, inbound spending in April – June 2019 was on par with April – June 2018 with £6.0 billion spent. With all the previous months in 2019 down YoY, spend in the year to date (£10.3 billion) was 2% below January – June 2018 though. Overall, overseas visitors spent £22.7 billion in the UK in the twelve months to June 2019, down 6% compared to the previous twelve-month period.

# Journey Purpose

By journey purpose	June 2019 visits (000)	% change vs. Jun 2018	Last 3 months (Apr – Jun 19) visits (000)	% change vs. Apr - Jun '18	Year to date (Jan – Jun 19) visits (000)	% change vs. Jan - Jun '18	Rolling 12 months (Jul – Jun 19) visits (000)	% change vs. Jul '17 - Jun '18
Holiday	1,640	18%	4,340	0%	7,080	3%	15,360	5%
VFR	880	-13%	2,810	-6%	5,350	-5%	11,480	-5%
Business	800	24%	2,140	0%	4,270	-1%	8,420	0%
Miscellaneous	210	9%	580	0%	1,120	-3%	2,530	-7%

- **Holiday** visits reached a new record in June 2019 with 1.6 million inbound holiday visits, up 18% YoY. With a decline in May though, holiday visits in April – June 2019 were on par with Q2 2018. This could have been partly influenced by the timing of Whit Monday, a public holiday in many European countries that fell in June 2019 but May 2018. With only May being down YoY, there were still 3% more overseas holiday visits in the first six months of 2019 than in those months in 2018. There were 5% more such visits in the twelve months to June 2019, compared to July 2018 – June 2019.
- **Visits to friends and relatives (VFR)** in June 2019 were down 13% on the June 2018 record, to 880,000. With VFR visits posting YoY declines in five of the six first months of 2019, inbound VFR visits reached 5.4 million visits in the first half of 2019, down 5% on January – June 2018. Those visits are also down 5% YoY over the latest rolling twelve months, to 11.5 million visits.
- **Business** visits were up 24% in June 2019 to 800,000, though not enough to catch up with the June 2016 record. The latest three months and twelve months were on par with those months a year ago respectively, but, with 4.3 million visits, inbound business visits in the first half of 2019 are still 1% down on January – June 2018.
- **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 other journey purpose categories, miscellaneous visits represent a smaller proportion of inbound UK visits and results do tend to fluctuate. Visits in April – June were on par with 2018, but down 7% YoY over the rolling twelve months to June 2019.

# Global Regions

By global region	June 2019 visits (000)	% change vs. Jun 2018	Last 3 months (Apr – Jun 19) visits (000)	% change vs. Apr - Jun '18	Year to date (Jan – Jun 19) visits (000)	% change vs. Jan - Jun '18	Rolling 12 months (Jul – Jun 19) visits (000)	% change vs. Jul '17 - Jun '18
EU Total	2,040	8%	6,230	-6%	11,820	-2%	24,560	-1%
EU15	1,660	13%	5,020	-6%	9,270	-4%	19,570	-2%
Other EU	380	-9%	1,210	-4%	2,540	5%	4,980	2%
Rest of Europe	210	15%	600	5%	1,060	6%	2,290	0%
North America	680	27%	1,610	18%	2,390	12%	4,980	8%
Rest of World	600	-6%	1,440	-5%	2,560	-6%	5,970	-5%

- Visits from **the EU** were up 8% YoY in June 2019 to 2.0 million, after a decline in May 2019. The timing of Whit Monday, a public holiday in many European countries that fell in June 2019 but May 2018, could have partially contributed to those results. However, the latest three months were down 6%, year to date down 2%, and the latest rolling year down 1% YoY.
  - Within this, visits from the **EU15 markets** followed this trend with June 2019 up 13% YoY to 1.7 million visits from the EU15, but April – June 2019 visits were down 6% YoY, and July 2018 – June 2019 down 2% to 19.6 million.
  - Visits from **Other EU** were down 9% YoY in June 2019 though. With growth in visits between January and March and mild declines in April and May, the first 6 months of 2019 were still up 5% YoY, to a record 2.5 million visits.
- Visits to the UK from the **Rest of Europe** were up 15% YoY in June 2019, and up 5% in April-June, with the latest rolling year on par with July 2017 – June 2018 with 2.3 million visits overall.
- Visits from **North America** were up 27% YoY in June 2019 to 680,000 – a new record. They also set new records for the April – June period with 1.6 million visits, and January – June with 2.4 million visits. Finally, there were 5.0 million visits in the twelve months to June 2019, a new record for any 12-month results, overtaking the previous record set in 2000.
- **'Rest of World' markets** saw a 6% decrease in visits in June 2019 vs June 2018 to 600,000, confirming the downward trend observed in all 2019 months so far but in May. Visits in the year to date were 6% down on January – June 2018, and the latest rolling year is down 5% on July 2017 – June 2018 visits.

# Outbound and Competitors

## Travel abroad by UK residents in last three months:

	April – June 2019	% change vs. Apr – Jun 2018
Visits (000)	19,090	-4%
Spend (£ million)	£11,890	2%

- UK residents took 19.1 million visits abroad between April and June 2019, down 4% on the levels seen in the same period in 2018. These visitors spent £11.9 billion, up 2% on 2018.
- Between April and June 2019, UK residents took 3% fewer holiday outbound trips than in the same period in 2018, 5% fewer business visits and 6% fewer trips for visiting friends and relatives and 6% fewer for miscellaneous purposes too.
- Visits by UK residents to Europe overall were down 4% in April – June 2019, compared to the same months in 2018. Visits to the EU were down 5%; within these, there 6% fewer visits to the EU15 but 4% more to destinations in Other EU countries in the three months to June 2019. Visits to North America were down 5% and to the Rest of the World down 1%.

## The international picture\*

- Most of the UK's main competitors shown on the table below have reported an increase in inbound arrivals in the first months of 2019.
- Strong growth in visits was seen in Turkey and Italy, whilst France was just on par with the same months the year before and visits to the UK and the USA dropped slightly.
- Figures relate to different time periods so comparisons should be treated with caution.

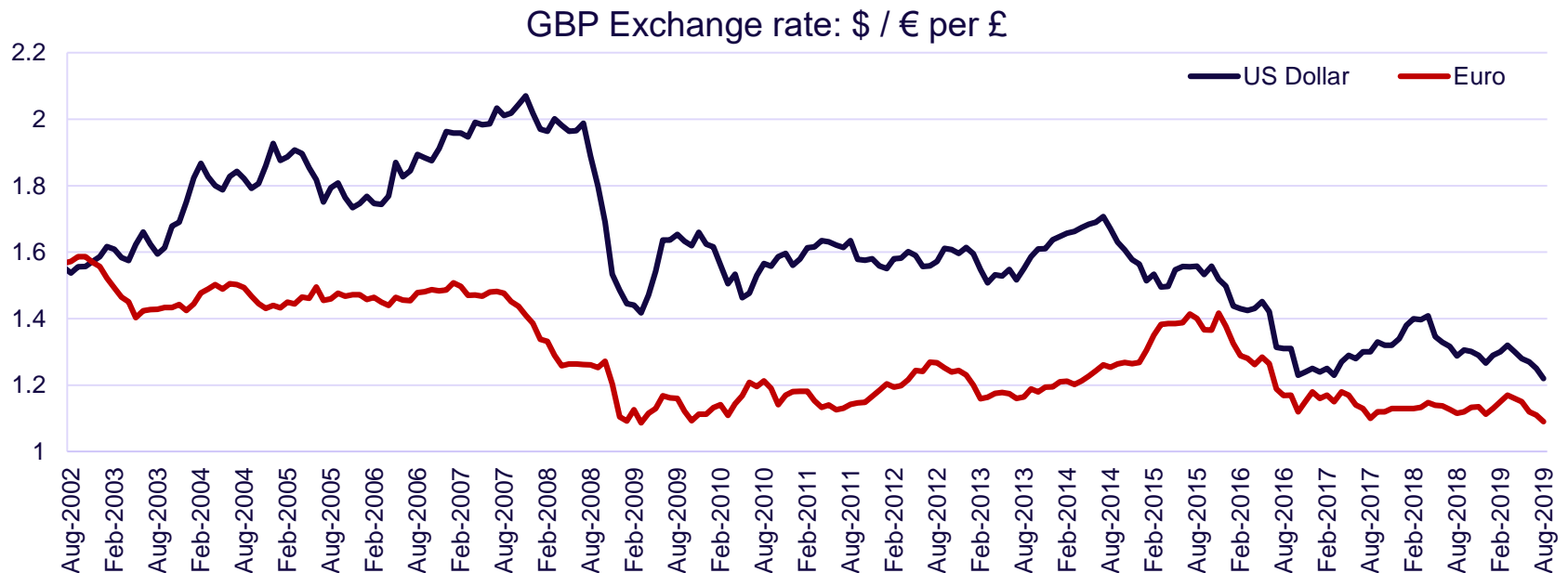
Destination	Growth in overseas visits	Period (Jan 2019 to ...)
Turkey	14%	July
Italy	7%	May
Canada	4%	June
Netherlands	4%	May
Rep. of Ireland	3%	July
Australia	2%	June
Switzerland	2%	June
Germany	2%	June
Spain	2%	April
France	0%	April
UK	-1%	June
USA	-2%	June

**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

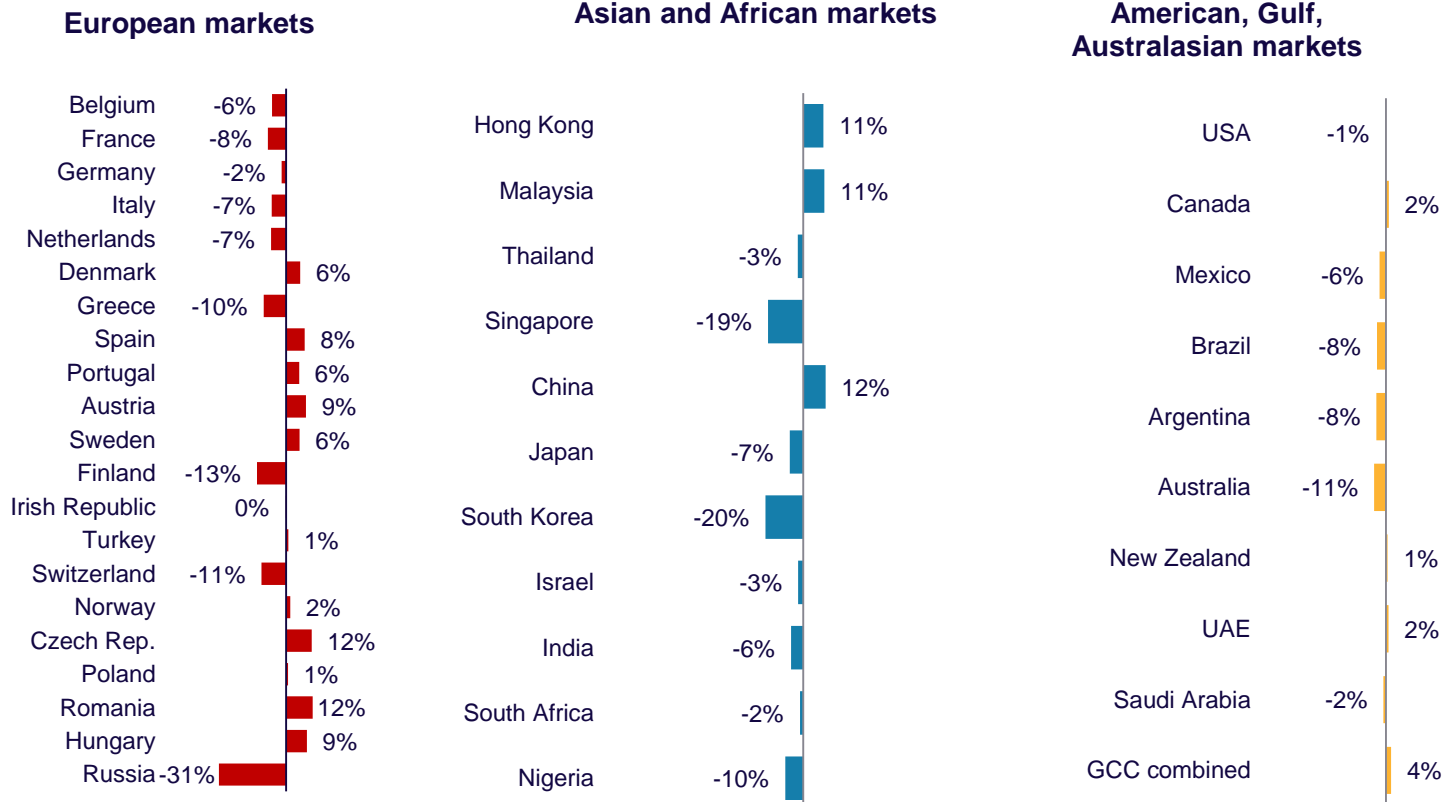
- The cost of Sterling for those visiting the UK was high in 2015 but in 2016 it began to fluctuate due to political uncertainty. From late June 2016, the sharp depreciation of the pound following the referendum result made the UK a more affordable destination for many markets.
- The value of Sterling 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 \$1.27 in June 2019. Against the euro, in June 2019, at €1.12, Sterling was 1% down compared to its value in June 2018, and 11% down compared to June 2016 (the referendum month).
- In June 2019, Sterling was 3% up against the Australian dollar, 2% up against the Chinese Yuan, but 3% down against the Canadian dollar compared to June 2018; but down 5%, down 7% and down 8% on June 2016 against those currencies respectively.





# Individual markets – latest 12 month results

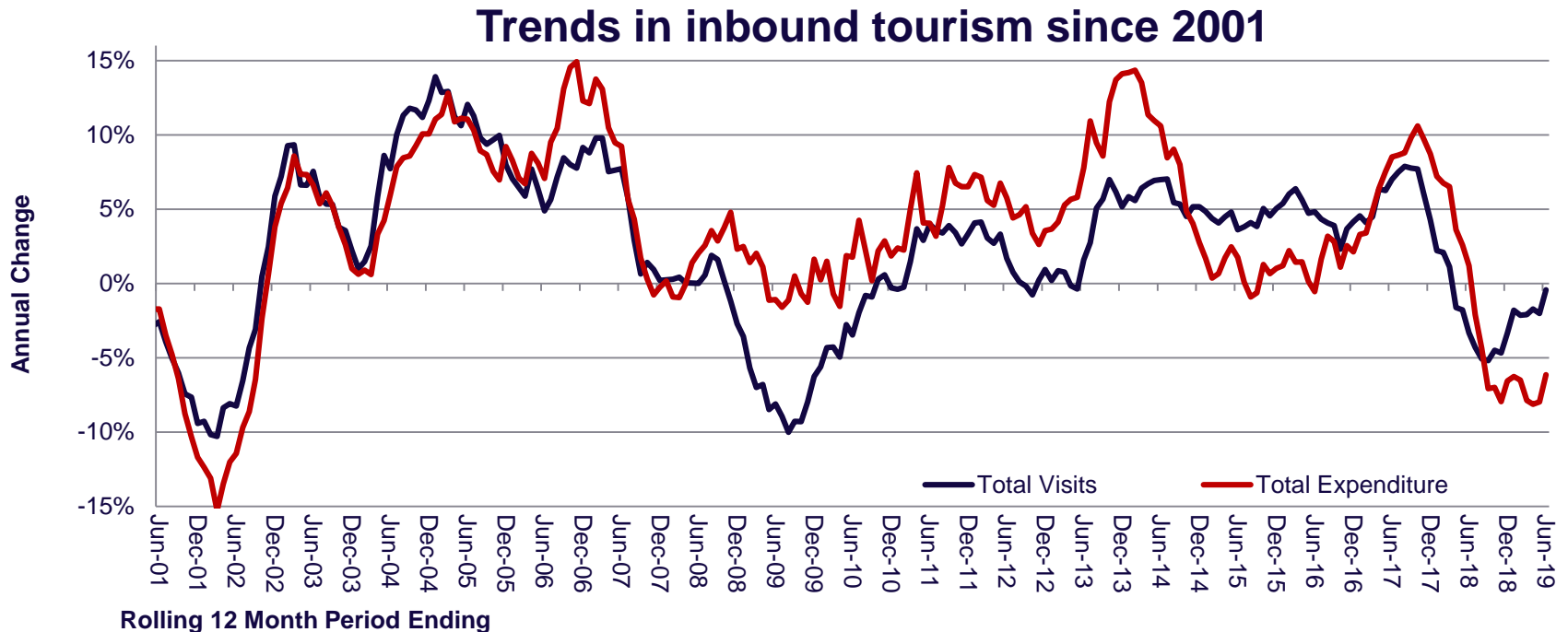
Using the latest available market level data, the following three charts show the percentage change in visits to the UK from a number of markets in the latest rolling year of data (the latest four quarters compared to the previous four quarters, in this case from **April 2018 – March 2019 v April 2017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

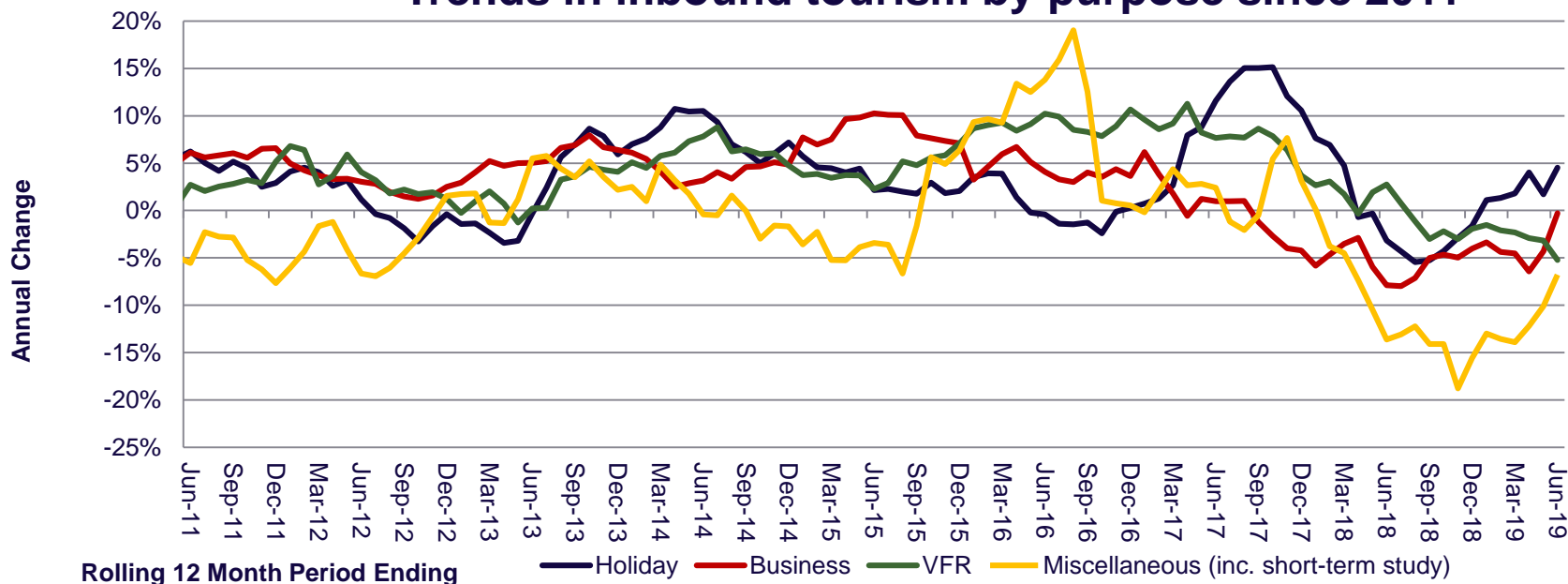


- This chart shows the year-on-year change in headline IPS results based on a 'rolling twelve-month' basis. Presenting the data in this way enables us to spot emerging trends and helps to 'smooth out' erratic results for any single month.
- This clearly illustrates the dip in inbound tourism seen post 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 continued into the first months of 2019.
- Whilst visits growth has remained positive in most recent years, spend has fluctuated more. As of June 2019, visits in the last twelve months were stable and inbound spend was tracking down 6% compared to the twelve months to June 2018.

# Longer term trends

## Journey Purpose

### Trends in inbound tourism by purpose since 2011

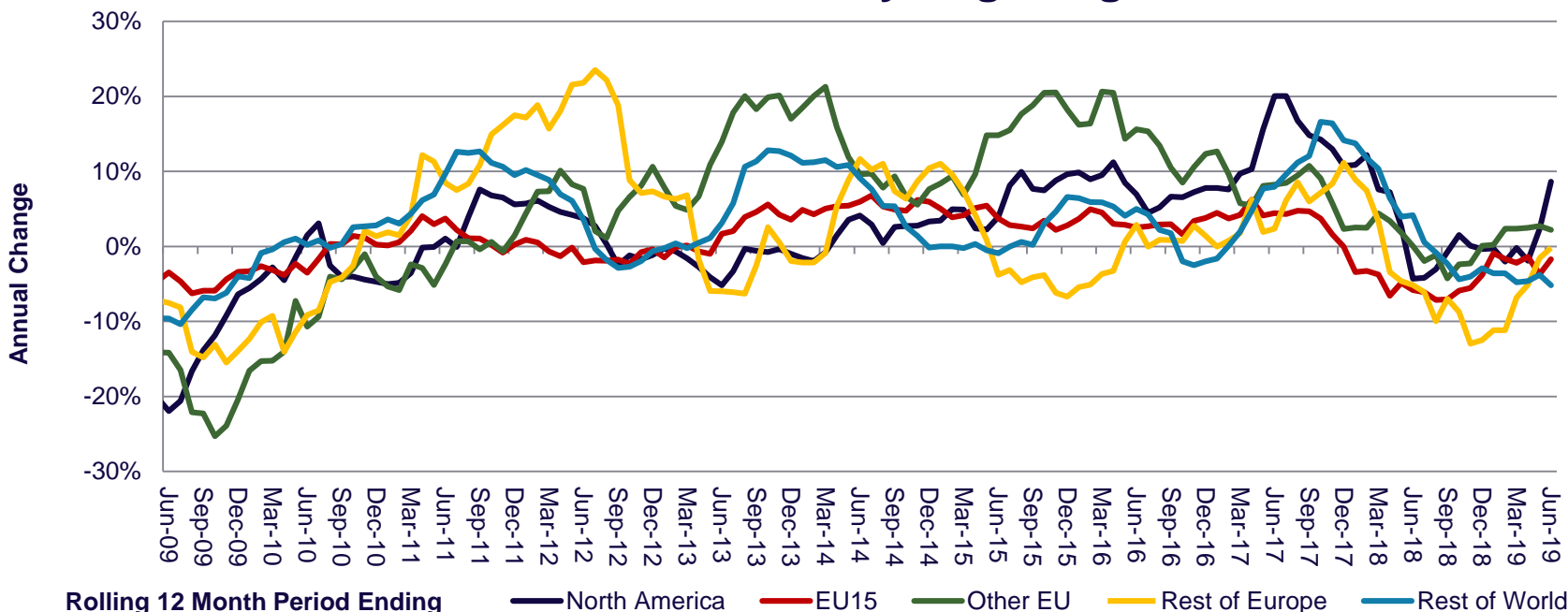


- By journey purpose holiday visits were far more resilient to the recession in the late 2000s and mostly have shown long term growth. There has been some variability in recent years. In the most recent 12 months, holiday visits were up 5%.
- After a significant downturn in 2009, business visits have generally seen steady growth since, which intensified in 2015. However, they have been decreasing for most of the past two years, but the more recent 12 months were stable.
- 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 2009

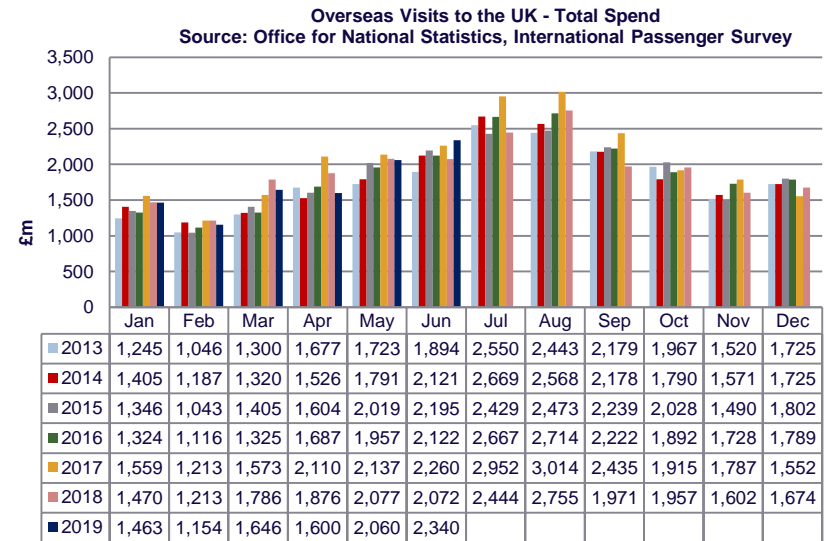
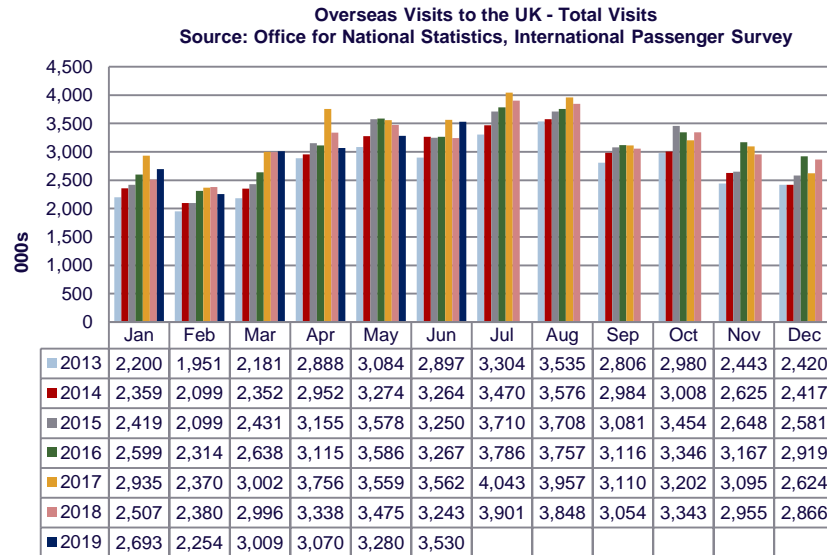


- This chart shows the longer term picture and the varying rates of recovery in visit numbers after the global financial crisis.
- Until 2017, visits from EU markets were growing at a steady pace, but they have slowed down since. Numbers in 2018 were down on 2017, with 2019 also seeing a decline for EU15 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, were stable in 2018 and have grown again in the first half of 2019. Visits from the 'Rest of World' region were growing in 2017 but have been decreasing since mid-2018.

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

# Detailed monthly trends

## Visits and spend



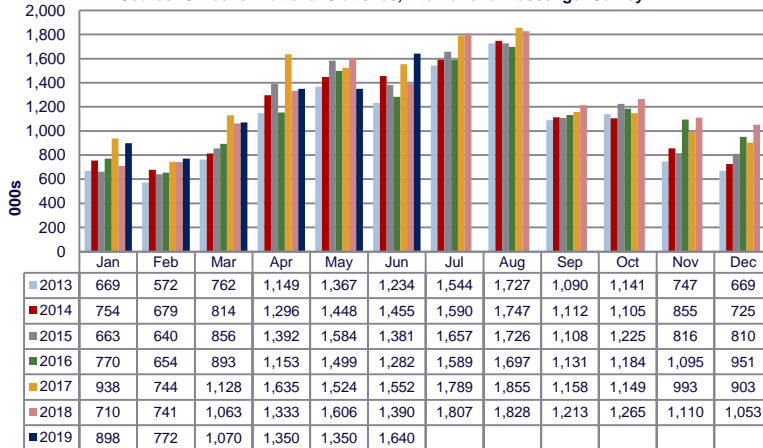
**More:** Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available [here](#)

# Detailed monthly trends

## Journey Purpose

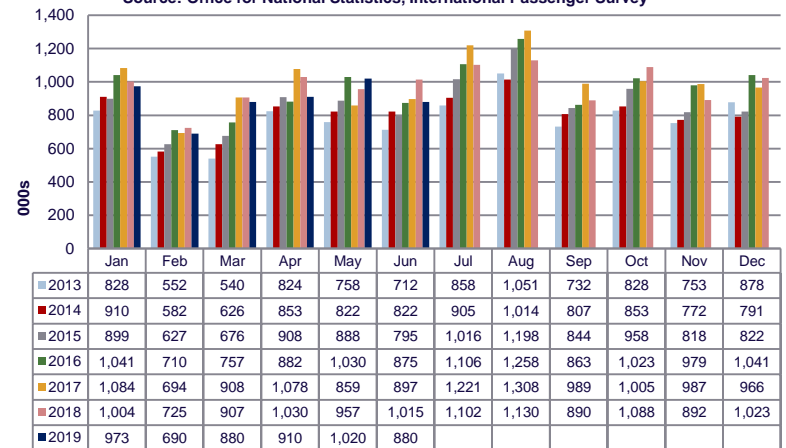
Overseas Visits to the UK - Holiday Visits

Source: Office for National Statistics, International Passenger Survey



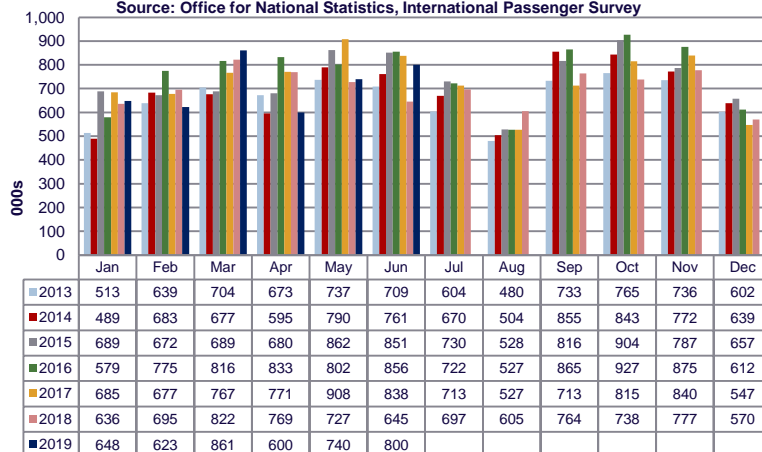
Overseas Visits to the UK - Visits to Friends and Relatives

Source: Office for National Statistics, International Passenger Survey



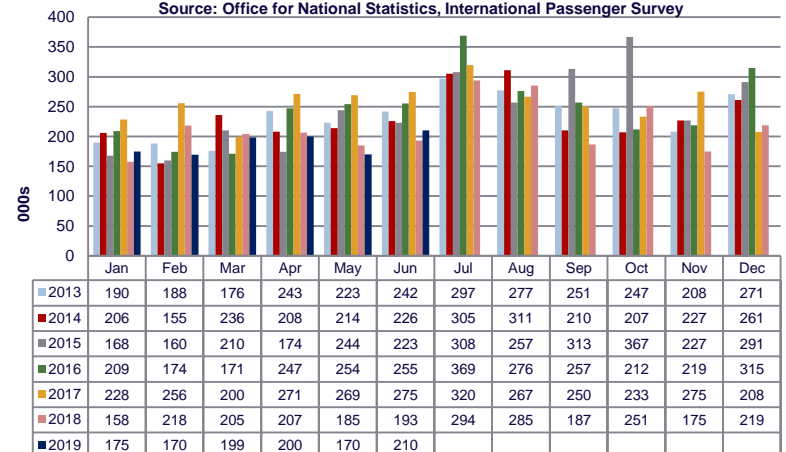
Overseas Visits to the UK - Business Visits

Source: Office for National Statistics, International Passenger Survey



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

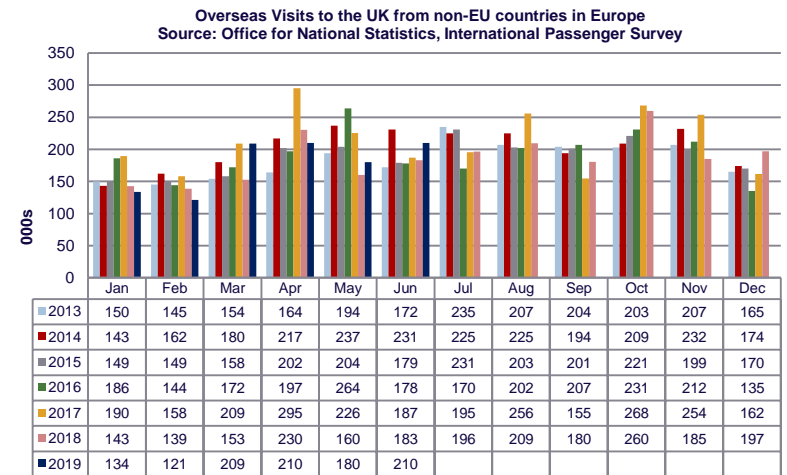
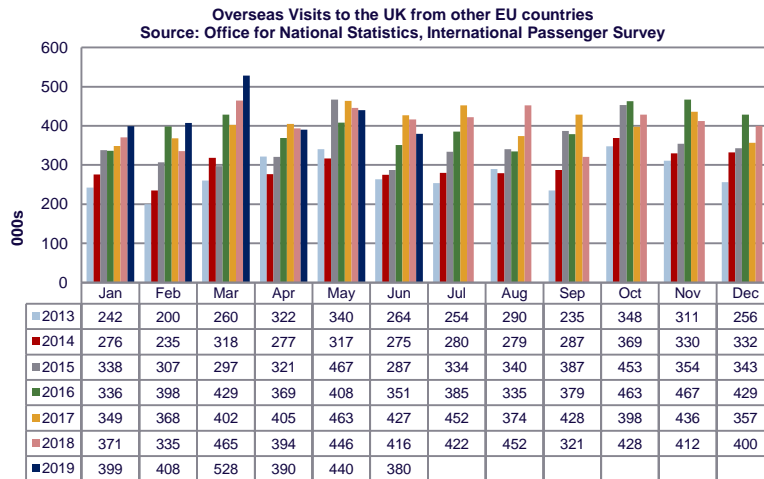
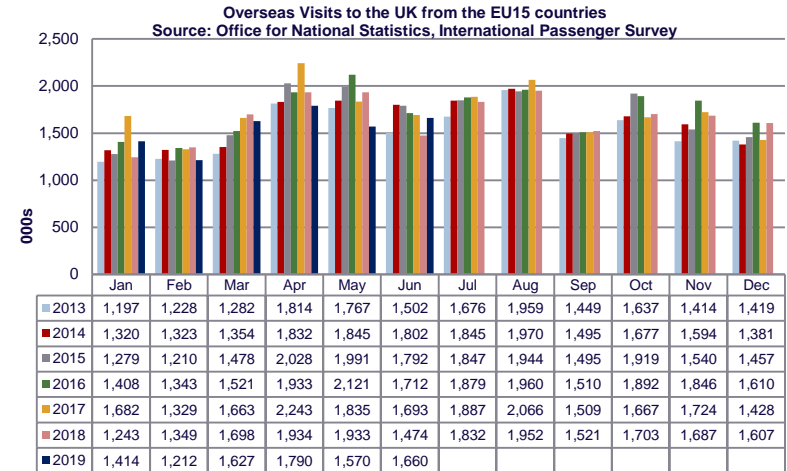
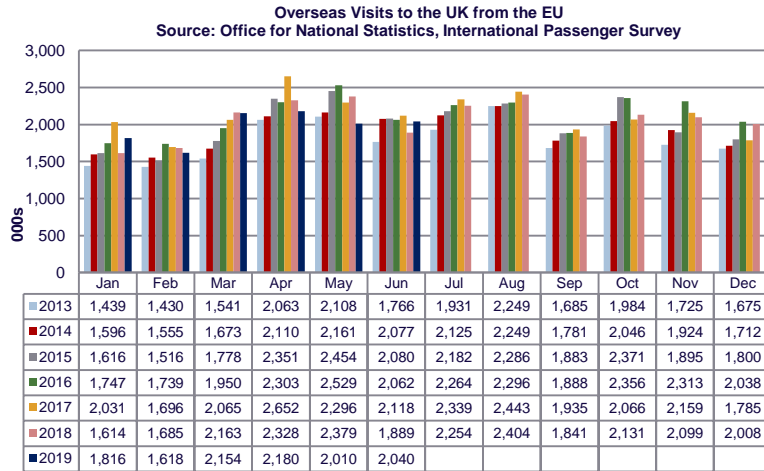
Source: Office for National Statistics, International Passenger Survey



**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)

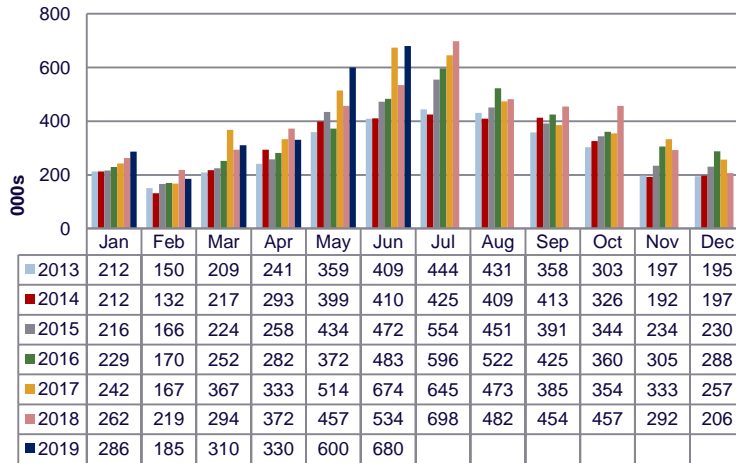


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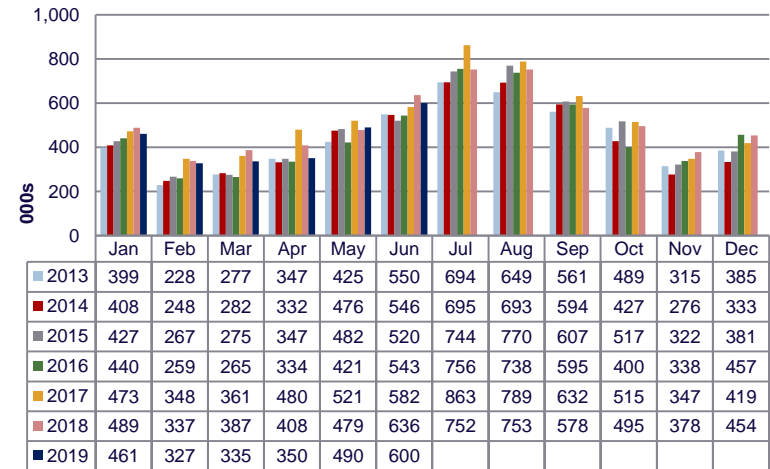
# Detailed monthly trends

## 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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