

# Adjustments to IPS data from 2009 onwards



*VisitBritain user guide*

*May 2020*

*Please note that despite VisitBritain's expertise, the ONS will always be best placed to advise on the use and interpretation of the IPS data.*

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# How have estimates of UK inbound tourism changed? | *Contents*

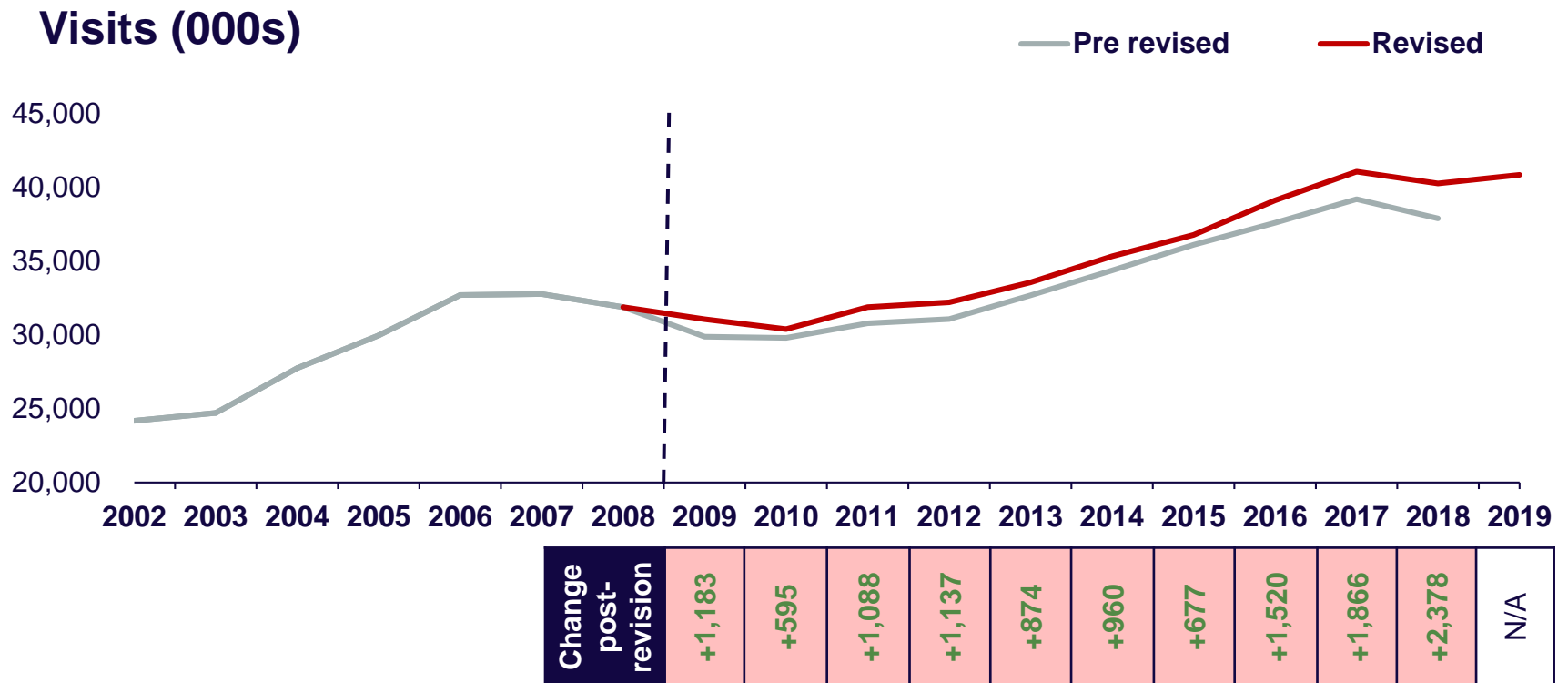
This section outlines the changes in estimates of UK inbound tourism, by directly comparing key metrics in the revised data with those pre-revision.

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# 1. Overall inbound tourism to the UK

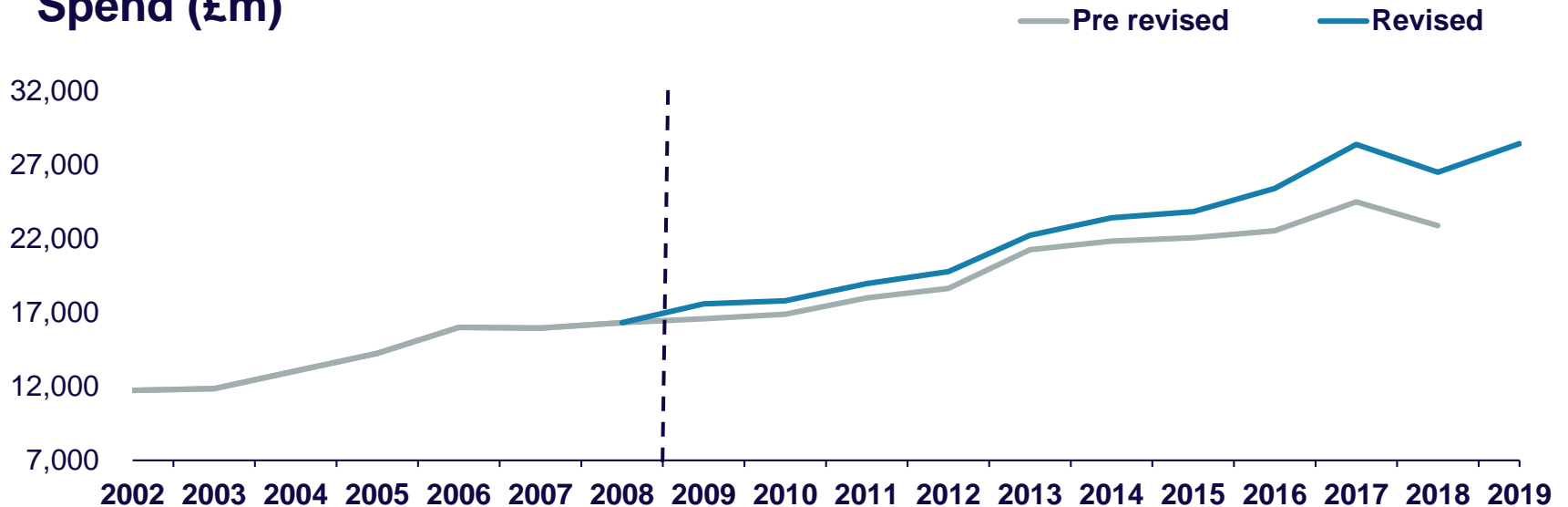
# Inbound volume trend



When it comes to inbound visits to the UK, the revised IPS data indicates a more positive trend from 2009-2018 than the pre-revised data. On average, the revised data reveals 1.2 million additional visits per year within that time period. The year demonstrating the highest gain is 2018, with an additional 2.4 million nights. Following 2018, the years with the most gain are 2017 and 2016. Additionally, the revised data shows the UK breaking 40 million inbound visits in 2017, and maintaining this achievement in the following two years.

# Inbound value trend

## Spend (£m)

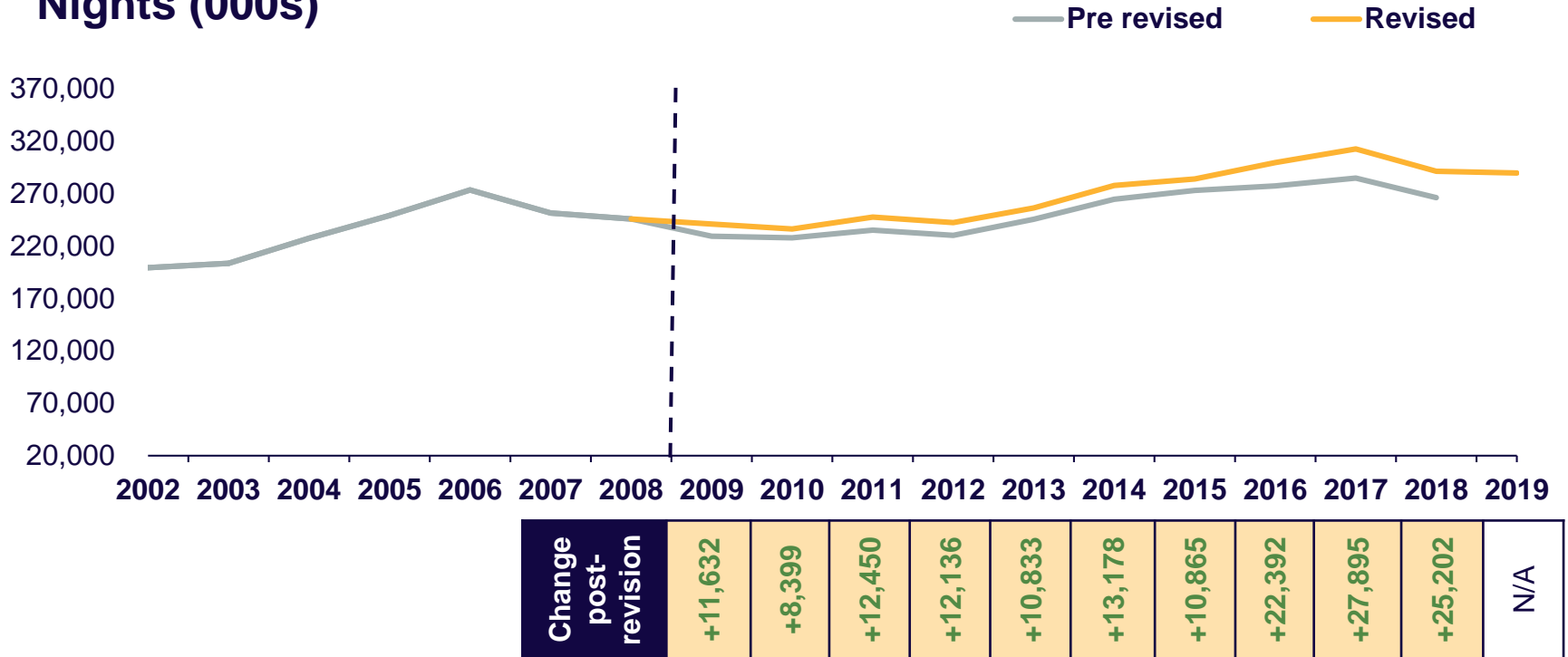


Change post-revision	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
	+1,003	+903	+975	+1,141	+981	+1,574	+1,767	+2,872	+3,890	+3,611	N/A

When comparing the revised inbound spend data with pre-revised data, a similar trend is seen as that for inbound visits. Overall, every year from 2009 to 2018 has seen a gain in visits in the revised data, with the highest gains being seen in later years. On average, the revised data reveals an additional £1.9 billion in visitor spend per year from 2009-2018. Within this period, the year which gains the most is 2017, with an additional £3.9 billion in visitor spend. Following 2017, the years with the next highest gains are 2018 and 2016.

# Inbound nights trend

## Nights (000s)



Revised IPS data reveals a consistent gain in inbound visitor nights from 2009 to 2019, when compared with pre-revised data. On average, the revised data reveals an additional 15.5 million nights spent by inbound visitors per year from 2009-2018. As we have seen for other measures of inbound tourism (visits and spend), the highest gains are seen in later years within this period. 2017 is the year which has seen the largest gain in nights, with an additional 27.9 million nights revealed. Following 2017, the years demonstrating the highest gain in nights are 2018 and 2016.



# Inbound volume, value & nights | *Summary*

Year	Pre-revised visits (000s)	Revised visits (000s)	Change in visits estimate (000s)	Pre-revised spend (£m)	Revised spend (£m)	Change in spend estimate (£m)	Pre-revised nights (000s)	Revised nights (000s)	Change in nights estimate (000s)
2009	29,889	31,072	+1,183	16,592	17,594	+1,003	229,387	241,019	+11,632
2010	29,803	30,398	+595	16,899	17,802	+903	227,846	236,245	+8,399
2011	30,798	31,886	+1,088	17,998	18,973	+975	235,197	247,646	+12,450
2012	31,084	32,221	+1,137	18,640	19,780	+1,141	230,191	242,326	+12,136
2013	32,692	33,567	+874	21,258	22,238	+981	245,477	256,310	+10,833
2014	34,377	35,337	+960	21,849	23,423	+1,574	264,577	277,756	+13,178
2015	36,115	36,792	+677	22,072	23,839	+1,767	273,054	283,919	+10,865
2016	37,609	39,129	+1,520	22,543	25,415	+2,872	277,295	299,687	+22,392
2017	39,214	41,080	+1,866	24,507	28,396	+3,890	284,781	312,676	+27,895
2018	37,905	40,283	+2,378	22,897	26,508	+3,611	266,122	291,324	+25,202
2019	NA	40,857	NA	NA	28,448	NA	NA	289,628	NA

# Spend per visit

Year	Pre-revised spend per visit (£)	Revised spend per visit (£)	Change in spend per visit estimate (£)
2009	£555	£566	+£11
2010	£567	£586	+£19
2011	£584	£595	+£11
2012	£600	£614	+£14
2013	£650	£663	+£12
2014	£636	£663	+£27
2015	£611	£648	+£37
2016	£599	£650	+£50
2017	£625	£691	+£66
2018	£604	£658	+£54
2019	NA	£696	NA

Looking at revised visit and spend data, we can see that average spend per visit estimates for inbound visitors to the UK have increased throughout the period from 2009 to 2019. In fact, the average gain per year is an additional £30 spent per visit. The highest gains in spend per visit are seen in later years, with the highest gain of +£66 seen in 2017.

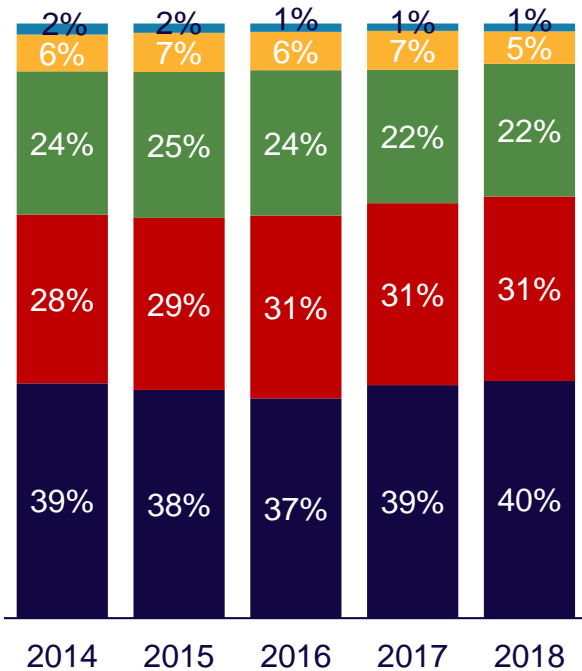
# Nights per visit

Year	Pre-revised nights per visit	Revised nights per visit	Change in nights per visit estimate
2009	7.7	7.8	+0.1
2010	7.6	7.8	+0.1
2011	7.6	7.8	+0.1
2012	7.4	7.5	+0.1
2013	7.5	7.6	+0.1
2014	7.7	7.9	+0.2
2015	7.6	7.7	+0.2
2016	7.4	7.7	+0.3
2017	7.3	7.6	+0.3
2018	7.0	7.2	+0.2
2019	NA	7.1	NA

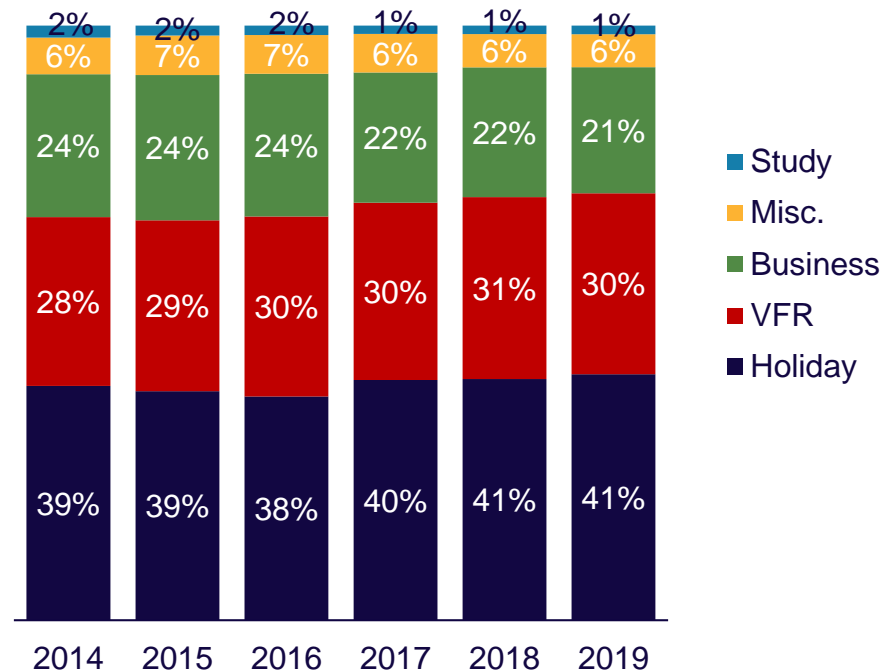
Nights per visit spend by inbound visitors to the UK are estimated to be marginally higher in the revised IPS data from 2009 to 2018. However, the gain is relatively small, with an average of 0.2 nights added to the nights per visit each year within that period. The highest gains of nights per visit are seen in 2016 and 2017.

# Journey purpose

Percentage of visits: pre-revision



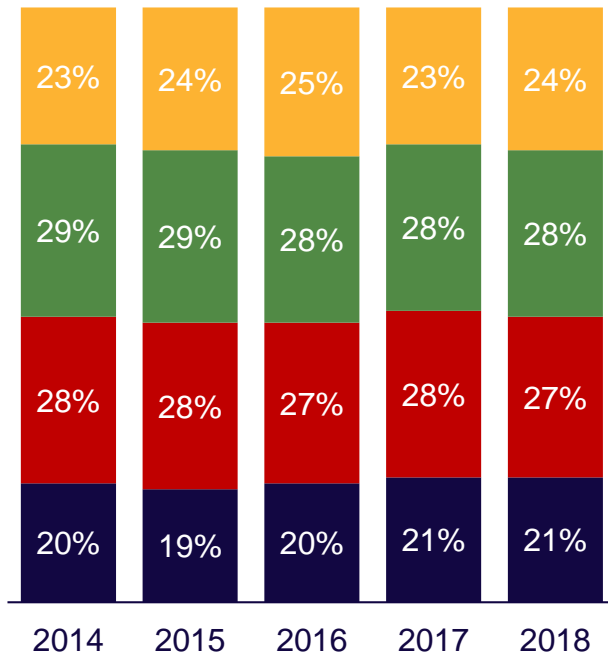
Percentage of visits: revised



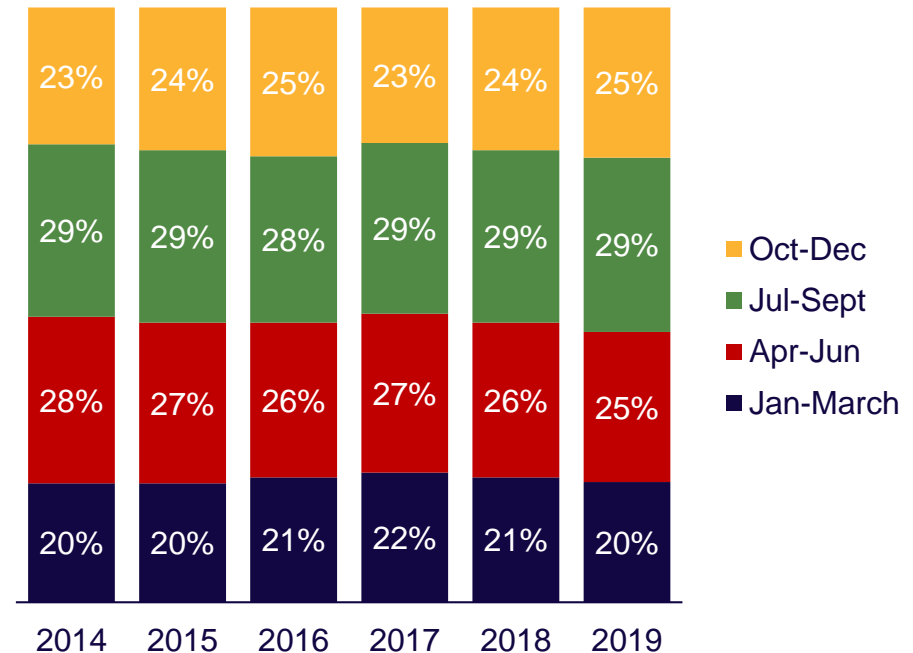
When examining shares of each journey purpose within visits for pre-revision and revised data, we can see a slight increase in share for Holiday visits from 2016 onwards. Linked to this, the VFR and Business purposes lose about one percentage point of share each in 2017. Beyond this, any shifts are smaller one percentage point.

# Seasonality

Percentage of visits: pre-revision



Percentage of visits: revised



Changes in seasonality of overall inbound visits are slight when comparing pre-revised and revised data.

Share of quarter one slightly increased in 2015 and 2016, whilst quarter three lost about 1 percentage point of share in those same years. However, quarter two lost 1 percentage point of share in 2017, whilst quarter three gained close to 1 percentage point of share that year.



## 2. Source markets for inbound tourism

# Top global source markets for visits

Top 10: pre-revision\*

Visits from residents of:	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
USA	3	3	3	3	3	3	2	2	2	1
France	1	1	1	1	1	1	1	1	1	2
Germany	4	2	2	2	2	2	3	3	3	3
Irish Republic	2	4	4	4	4	4	4	4	4	4
Spain	5	5	5	6	6	5	5	5	5	5
Netherlands	6	6	6	5	5	6	6	6	6	6
Poland	8	9	9	8	8	8	8	8	7	7
Italy	7	7	7	7	7	7	7	7	8	8
Belgium	10	8	10	9	9	9	9	9	9	9
Australia	9	10	8	10	10	10	10	10	10	10

Top 10: revised\*

Visits from residents of:	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
USA	4	3	3	3	3	3	2	2	1	1	1
France	1	1	1	1	1	1	1	1	2	2	2
Germany	2	2	2	2	2	2	3	3	3	3	3
Irish Republic	3	4	4	4	4	4	4	4	4	4	4
Spain	5	5	5	5	6	5	5	5	5	5	5
Italy	7	6	6	6	5	6	7	6	7	6	6
Netherlands	6	7	7	7	7	7	6	7	6	7	7
Poland	8	9	8	8	8	8	8	8	8	8	8
Belgium	9	8	9	9	9	9	9	9	9	9	9
Australia	10	10	10	10	10	10	10	10	10	10	10

When comparing pre-revision and revised data, the top 10 markets for visits in 2018 were the same, with some small shifts in order. In the revised data for 2018, Italy gained two ranks to be number 6, pushing the Netherlands and Poland down one rank each as a consequence. This same top ten is maintained from 2018 to 2019 in the revised data. In fact, Italy maintains a slightly higher ranking in the revised data in most years, when comparing to pre-revision data. Another notable difference is the USA achieving the top rank in 2017, rather than this occurring in 2018 as was the case before the revision.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' visit data.

# Top global source markets for spend

Top 10: pre-revision\*

Visits from residents of:	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
USA	1	1	1	1	1	1	1	1	1	1
Germany	2	2	2	3	3	2	3	2	2	2
France	3	3	3	2	2	3	2	3	3	3
Spain	5	6	6	6	5	5	5	6	5	4
Australia	6	4	4	4	4	4	4	4	4	5
Irish Republic	4	5	5	5	7	7	6	5	6	6
Italy	8	7	7	7	6	6	7	7	8	7
Netherlands	7	8	8	8	8	8	8	9	9	8
Canada	9	9	10	9	11	13	13	10	12	9
China	31	22	22	19	13	11	9	12	10	10

Top 10: revised\*

Visits from residents of:	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
USA	1	1	1	1	1	1	1	1	1	1	1
China	24	17	11	11	7	7	4	4	2	2	2
Germany	2	2	2	3	2	2	3	2	3	3	3
France	3	3	3	2	3	3	2	3	4	4	4
Australia	6	4	6	6	5	6	5	5	5	5	5
Italy	7	6	5	4	6	5	8	7	8	9	6
Spain	4	5	4	5	4	4	6	8	7	6	7
Irish Republic	5	7	7	7	8	8	7	6	9	7	8
UAE	14	18	21	12	10	15	11	12	10	8	9
Netherlands	8	8	8	8	9	9	9	10	11	10	10

Differences in top ten rankings for spend when comparing pre-revision and revised data are more significant than those seen in visit rankings. Most notably, China occupies a much higher ranking: specifically in 2018, China moves from 10<sup>th</sup> place to 2<sup>nd</sup> place. China's ranking is consistently higher in the revised data, and stays in the top 25 all the way back to 2009. Also, the United Arab Emirates is a new entrant in the top 10 in the revised data, first achieving this in 2013, and then in 2017 onwards. Due to these two new entrants, Canada no longer appears in the top 10 ranking for spend in 2017-2019.

Also, European markets tend to be ranked slightly lower in the top 10 in the revised data, particularly in later years

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' spending data.



## Source markets | Visits

Market	2018 pre-revised visits (000s)	2018 revised visits (000s)	2018 change in visits estimate (000s)	2019 visits (000s)
Australia	1,003	1,039	+36	1,063
Belgium	1,116	1,097	-20	1,135
Brazil	240	288	+48	291
Canada	850	852	+2	874
China	391	860	+468	883
Denmark	735	614	-121	691
France	3,693	3,599	-94	3,570
GCC*	836	1,097	+261	1,211
Germany	3,262	3,170	-92	3,233
Hong Kong	243	403	+160	409
India	511	680	+169	692
Irish Republic	2,782	2,983	+201	2,851
Italy	1,808	2,080	+273	2,197
Japan	247	429	+182	389
Netherlands	1,954	1,978	+24	1,987
Norway	673	648	-25	647
Romania	987	897	-90	902
Russia	181	229	+48	199
South Korea	161	305	+144	301
Spain	2,530	2,462	-68	2,326
Sweden	827	745	-82	789
Switzerland	808	825	+17	926
USA	3,877	4,571	+694	4,499

Notes: \*GCC includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE). GCC is not considered a single market for ranking purposes. NB the revisions to market level data vary from year to year.

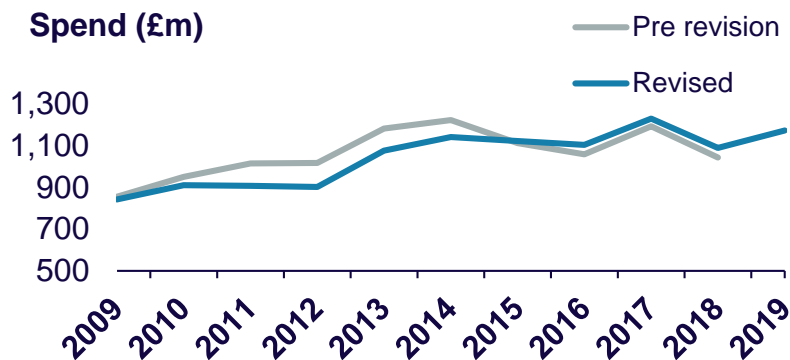
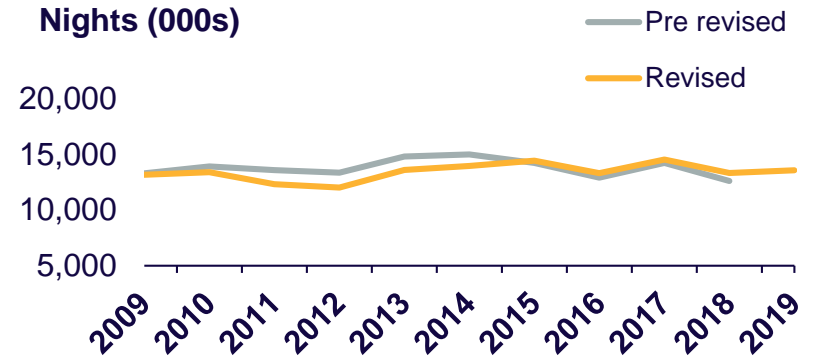
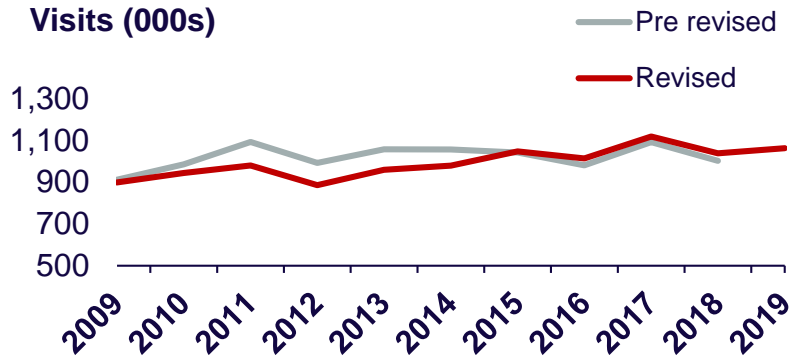
## Source markets | Spend

Market	2018 pre-revised spend (£m)	2018 revised spend (£m)	2018 change in spend estimate (£m)	2019 spend (£m)
Australia	1,044	1,090	+46	1,174
Belgium	399	389	-10	359
Brazil	215	252	+37	250
Canada	676	681	+5	734
China	657	1,501	+845	1,710
Denmark	379	321	-59	329
France	1,386	1,353	-33	1,413
GCC*	1,670	2,332	+662	2,606
Germany	1,520	1,483	-37	1,567
Hong Kong	385	486	+101	560
India	491	647	+156	753
Irish Republic	895	965	+70	958
Italy	784	902	+118	1,109
Japan	282	497	+215	369
Netherlands	716	722	+6	796
Norway	394	375	-19	437
Romania	479	436	-43	439
Russia	153	197	+44	182
South Korea	134	271	+137	285
Spain	1,110	1,079	-32	978
Sweden	447	399	-48	400
Switzerland	460	461	+2	570
USA	3,378	4,025	+647	4,184

Notes: \*GCC includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE). GCC is not considered a single market for ranking purposes. NB the revisions to market level data vary from year to year.



# Inbound volume, value & nights | *Trend*



When comparing pre-revised and revised data for Australia, gains in visits, nights and spend are seen from 2015 to 2018, with the most gains seen in 2018. In fact, 36,000 visits, £46 million and 725,000 nights are gained in this year. However, significant losses between 2011 and 2013 mean that on average, estimates have been lowered by 35,000 visits, £33 million and 388,000 nights per year from 2009 to 2018.



# Inbound volume, value & nights | *Summary*

Year	Pre-revised visits (000s)	Revised visits (000s)	Change in visits estimate (000s)	Pre-revised spend (£m)	Revised spend (£m)	Change in spend estimate (£m)	Pre-revised nights (000s)	Revised nights (000s)	Change in nights estimate (000s)
2009	912	899	-13	856	843	-13	13,310	13,179	-131
2010	986	944	-42	951	911	-40	13,929	13,401	-529
2011	1,093	981	-112	1,015	908	-108	13,601	12,323	-1,278
2012	993	886	-107	1,018	903	-115	13,366	12,027	-1,338
2013	1,058	960	-99	1,183	1,077	-106	14,818	13,609	-1,209
2014	1,057	980	-77	1,224	1,142	-81	15,000	13,965	-1,035
2015	1,043	1,048	+5	1,113	1,123	+10	14,245	14,443	+198
2016	982	1,015	+33	1,060	1,105	+45	12,912	13,317	+406
2017	1,092	1,120	+27	1,194	1,231	+37	14,241	14,548	+307
2018	1,003	1,039	+36	1,044	1,090	+46	12,618	13,343	+725
2019	NA	1,063	NA	NA	1,174	NA	NA	13,577	NA



## Spend per visit

Year	Pre-revised spend per visit (£)	Revised spend per visit (£)	Change in spend per visit estimate (£)
2009	£938	£937	<b>-£1</b>
2010	£964	£965	<b>+£1</b>
2011	£929	£926	<b>-£3</b>
2012	£1,025	£1,019	<b>-£6</b>
2013	£1,118	£1,122	<b>+£4</b>
2014	£1,157	£1,165	<b>+£8</b>
2015	£1,068	£1,072	<b>+£4</b>
2016	£1,079	£1,089	<b>+£9</b>
2017	£1,093	£1,099	<b>+£6</b>
2018	£1,041	£1,049	<b>+£8</b>
2019	NA	£1,104	NA

## Nights per visit

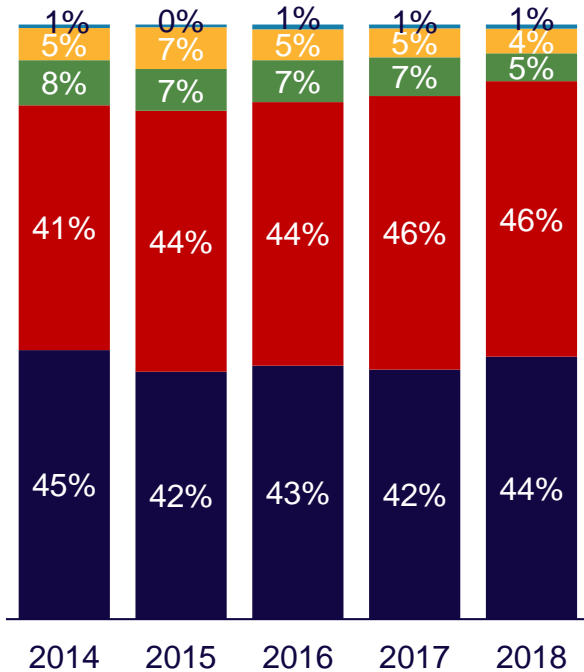
Year	Pre-revised nights per visit	Revised nights per visit	Change in nights per visit estimate
2009	14.6	14.7	<b>+0.1</b>
2010	14.1	14.2	<b>+0.1</b>
2011	12.4	12.6	<b>+0.1</b>
2012	13.5	13.6	<b>+0.1</b>
2013	14.0	14.2	<b>+0.2</b>
2014	14.2	14.2	<b>+0.1</b>
2015	13.7	13.8	<b>+0.1</b>
2016	13.2	13.1	<b>0.0</b>
2017	13.0	13.0	<b>0.0</b>
2018	12.6	12.8	<b>+0.3</b>
2019	NA	12.8	NA

Overall, estimates of Australian visitors' spend per night and nights per visit in the UK have increased when comparing pre-revision and revised data. The exceptions are lowered average spend per visit in 2009, 2011 and 2012. The most gain in spend per visit is seen in 2016 (a gain of £9 per visit) and the most gain in nights per visit is seen in 2018.

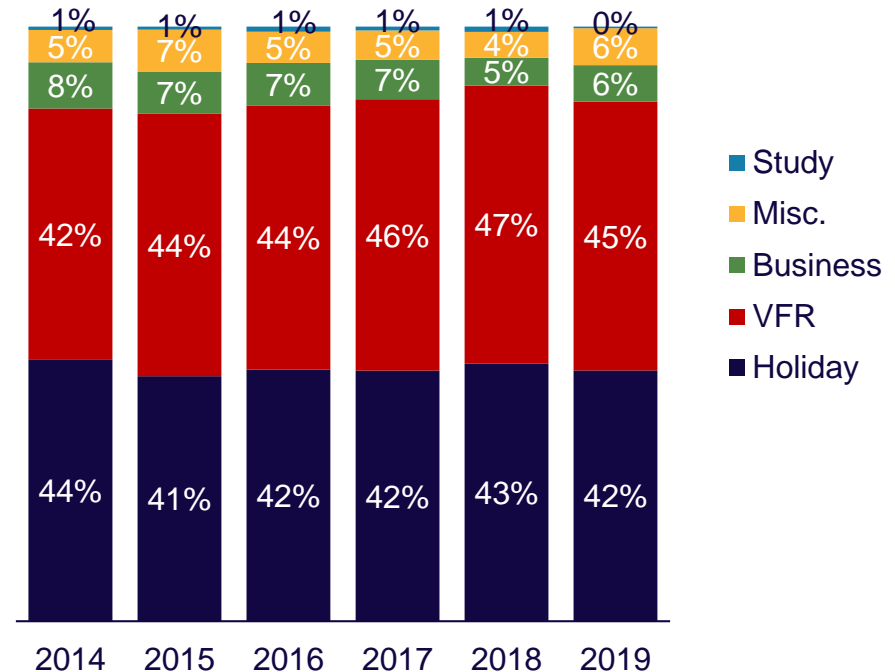


# Journey purpose

Percentage of visits: pre-revision



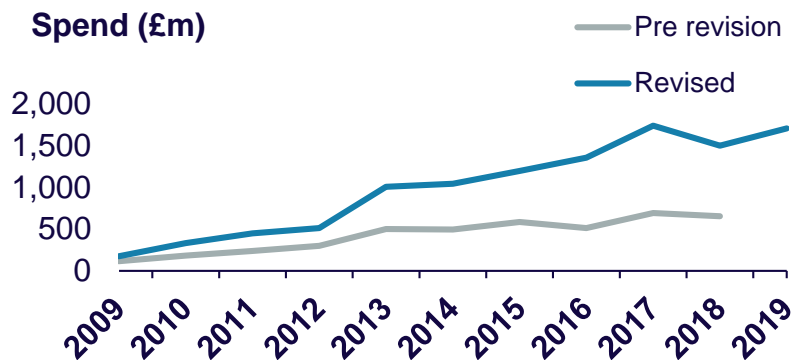
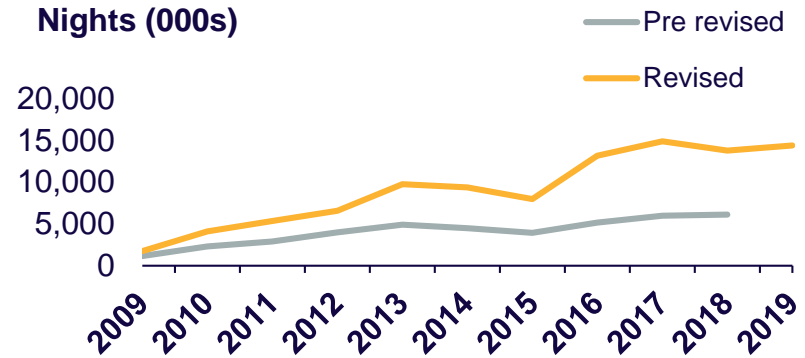
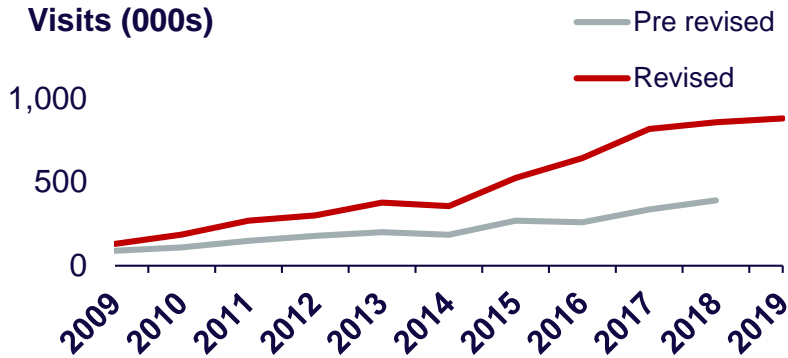
Percentage of visits: revised



Changes to shares of journey purpose for Australian visitors are slight when comparing pre-revision and revised data. The Holiday purpose loses 1 percentage point in 2018. This journey purpose also loses 1 percentage point in 2014, with the VFR purpose gaining 1 percentage point in kind.



# Inbound volume, value & nights | *Trend*



China has seen gains in visits, nights and spend each year from 2009 to 2018 when comparing pre-revised with revised data. These gains also increase significantly in later years.

The most visits, nights and spend are gained in 2017; with 482,000 visits, £1.0 billion spend and 8.9 million nights gained. The revised data more than doubled for all metrics in that year.



# Inbound volume, value & nights | *Summary*

Year	Pre-revised visits (000s)	Revised visits (000s)	Change in visits estimate (000s)	Pre-revised spend (£m)	Revised spend (£m)	Change in spend estimate (£m)	Pre-revised nights (000s)	Revised nights (000s)	Change in nights estimate (000s)
2009	89	131	+42	117	176	+59	1,166	1,751	+585
2010	109	186	+76	184	333	+149	2,303	4,106	+1,803
2011	149	270	+122	240	450	+210	2,906	5,367	+2,461
2012	179	301	+122	300	513	+213	4,000	6,583	+2,583
2013	200	378	+178	503	1,008	+506	4,918	9,767	+4,849
2014	185	357	+172	497	1,045	+547	4,486	9,386	+4,900
2015	270	526	+256	586	1,200	+614	3,929	7,983	+4,053
2016	260	645	+384	513	1,358	+844	5,166	13,192	+8,026
2017	337	819	+482	694	1,741	+1,047	5,988	14,916	+8,928
2018	391	860	+468	657	1,501	+845	6,124	13,802	+7,677
2019	NA	883	NA	NA	1,710	NA	NA	14,421	NA





## Spend per visit

Year	Pre-revised spend per visit (£)	Revised spend per visit (£)	Change in spend per visit estimate (£)
2009	£1,311	£1,341	<b>+£30</b>
2010	£1,677	£1,791	<b>+£114</b>
2011	£1,618	£1,664	<b>+£46</b>
2012	£1,680	£1,705	<b>+£25</b>
2013	£2,509	£2,667	<b>+£158</b>
2014	£2,688	£2,928	<b>+£240</b>
2015	£2,174	£2,281	<b>+£106</b>
2016	£1,972	£2,106	<b>+£135</b>
2017	£2,059	£2,125	<b>+£66</b>
2018	£1,678	£1,746	<b>+£69</b>
2019	NA	£1,937	NA

## Nights per visit

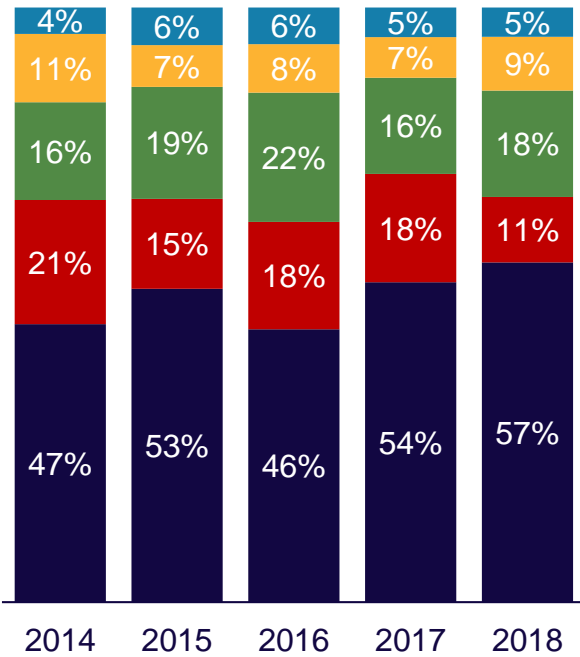
Year	Pre-revised nights per visit	Revised nights per visit	Change in nights per visit estimate
2009	13.1	13.4	<b>+0.3</b>
2010	21.0	22.1	<b>+1.1</b>
2011	19.6	19.9	<b>+0.3</b>
2012	22.4	21.9	<b>-0.5</b>
2013	24.6	25.8	<b>+1.3</b>
2014	24.2	26.3	<b>+2.1</b>
2015	14.6	15.2	<b>+0.6</b>
2016	19.8	20.5	<b>+0.6</b>
2017	17.8	18.2	<b>+0.4</b>
2018	15.6	16.1	<b>+0.4</b>
2019	NA	16.3	NA

In most cases, China has seen increases in estimates of spend per visit and spend per night of visitors in the UK every year from 2009 to 2018. The only exception is a lower estimated nights per visit in 2012. On average, estimates of spend have increased by £99 per visit, per year, and estimates of nights per visit have increased by 0.7 nights per visit, per year.

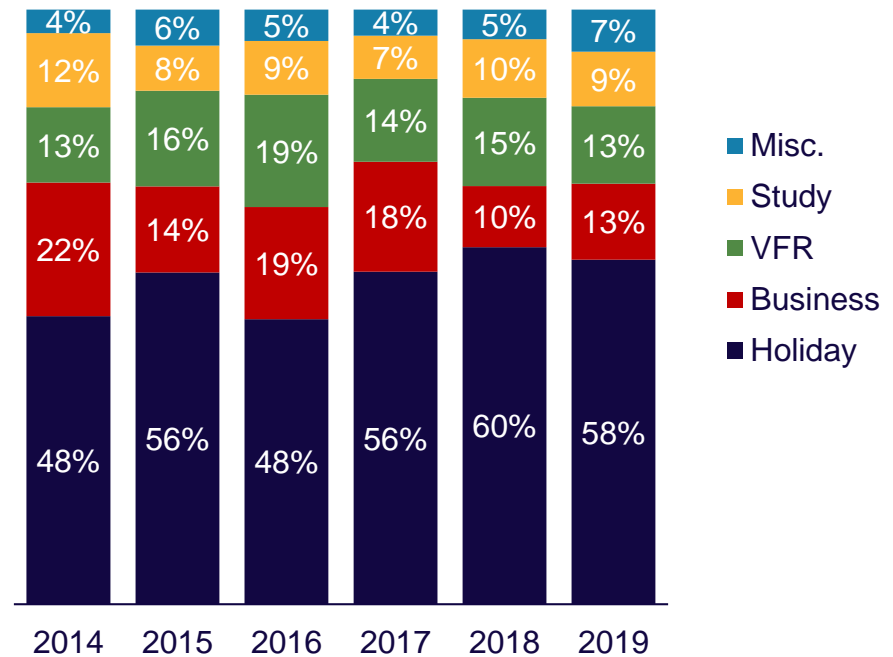


# Journey purpose

Percentage of visits: pre-revision\*



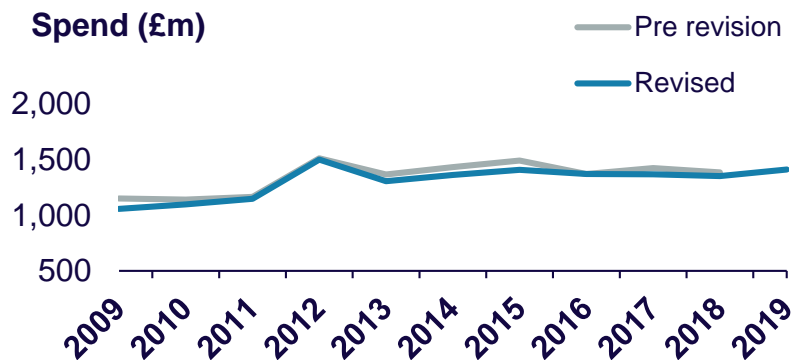
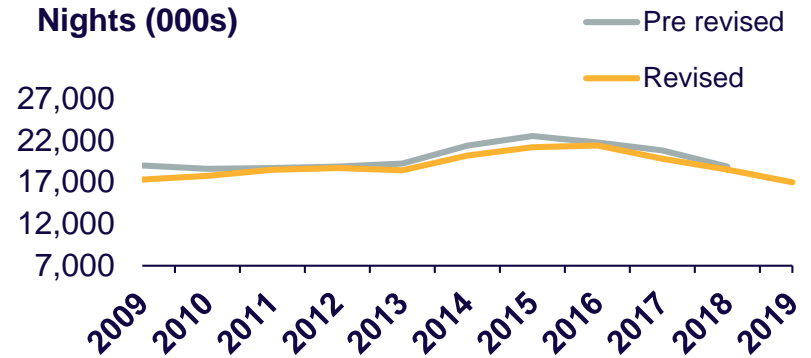
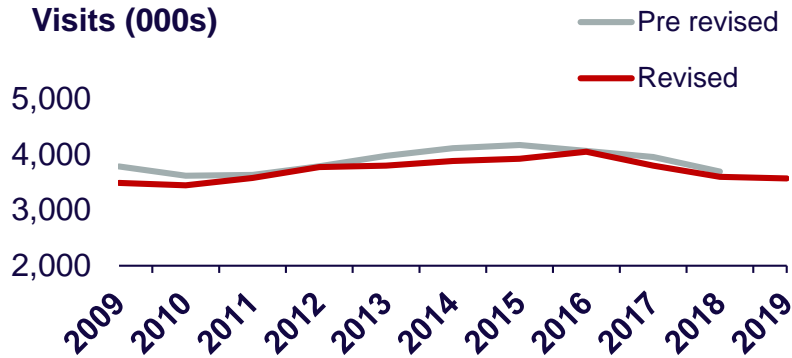
Percentage of visits: revised\*



There are noticeable changes to journey purpose of Chinese visitors when comparing pre-revision and revised data. The Holiday purpose consistently gains share throughout 2014 to 2018. The Study purpose also gains some share in all years apart from 2017, and Business gains share in 2014 and 2016. In contrast, the VFR purpose consistently loses share in all years.

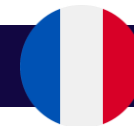


# Inbound volume, value & nights | *Trend*



In general, estimates for inbound visits, nights and spend for France have lowered throughout 2009-2018 when comparing pre-revision and revised data. However, in 2016, there was no change to spend.

On average, estimates of visits have been lowered by 146,000 visits, spend by £47 million per year, and nights by 793,000 nights per year.



# Inbound volume, value & nights | *Summary*

Year	Pre-revised visits (000s)	Revised visits (000s)	Change in visits estimate (000s)	Pre-revised spend (£m)	Revised spend (£m)	Change in spend estimate (£m)	Pre-revised nights (000s)	Revised nights (000s)	Change in nights estimate (000s)
2009	3,784	3,489	<b>-295</b>	1,151	1,057	<b>-94</b>	19,008	17,321	<b>-1,687</b>
2010	3,618	3,446	<b>-173</b>	1,142	1,099	<b>-43</b>	18,614	17,765	<b>-849</b>
2011	3,633	3,577	<b>-56</b>	1,166	1,149	<b>-17</b>	18,705	18,507	<b>-198</b>
2012	3,787	3,772	<b>-14</b>	1,513	1,501	<b>-12</b>	18,877	18,716	<b>-160</b>
2013	3,974	3,800	<b>-174</b>	1,368	1,307	<b>-60</b>	19,253	18,442	<b>-811</b>
2014	4,114	3,884	<b>-231</b>	1,434	1,363	<b>-71</b>	21,386	20,213	<b>-1,173</b>
2015	4,171	3,922	<b>-248</b>	1,493	1,410	<b>-83</b>	22,540	21,195	<b>-1,345</b>
2016	4,064	4,049	<b>-15</b>	1,372	1,372	<b>0</b>	21,778	21,415	<b>-363</b>
2017	3,956	3,799	<b>-157</b>	1,425	1,369	<b>-56</b>	20,823	19,829	<b>-994</b>
2018	3,693	3,599	<b>-94</b>	1,386	1,353	<b>-33</b>	18,873	18,520	<b>-353</b>
2019	NA	3,570	NA	NA	1,413	NA	NA	17,004	NA



## Spend per visit

Year	Pre-revised spend per visit (£)	Revised spend per visit (£)	Change in spend per visit estimate (£)
2009	£304	£303	-£1
2010	£316	£319	+£3
2011	£321	£321	£0
2012	£400	£398	-£2
2013	£344	£344	£0
2014	£348	£351	+£2
2015	£358	£359	+£1
2016	£338	£339	+£1
2017	£360	£360	£0
2018	£375	£376	+£1
2019	NA	£396	NA

## Nights per visit

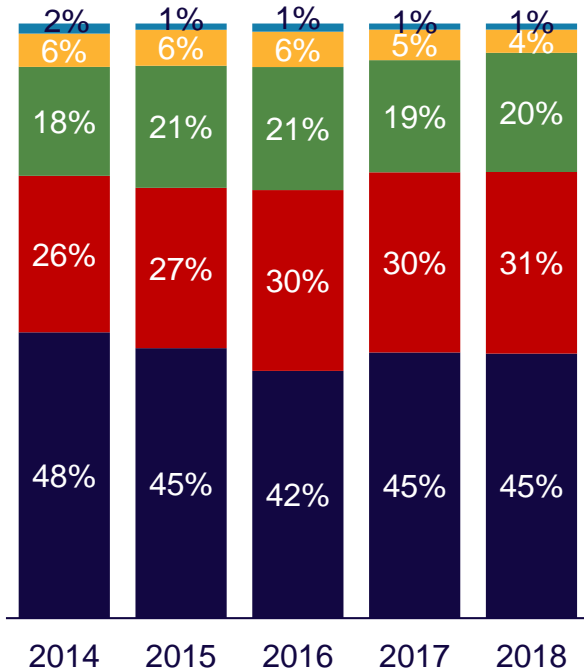
Year	Pre-revised nights per visit	Revised nights per visit	Change in nights per visit estimate
2009	5.0	5.0	-0.1
2010	5.1	5.2	0.0
2011	5.1	5.2	0.0
2012	5.0	5.0	0.0
2013	4.8	4.9	0.0
2014	5.2	5.2	0.0
2015	5.4	5.4	0.0
2016	5.4	5.3	-0.1
2017	5.3	5.2	0.0
2018	5.1	5.1	0.0
2019	NA	4.8	NA

Estimates of the spend per visit and nights per visit of French visitors in the UK have seen little change when comparing pre-revised with revised data. Most commonly, estimates of nights per visit have not changed, or only decreased marginally. In contrast, we can see increases in estimates of spend per visit in 2010, 2014, 2015, 2016 and 2018, all relatively low though.

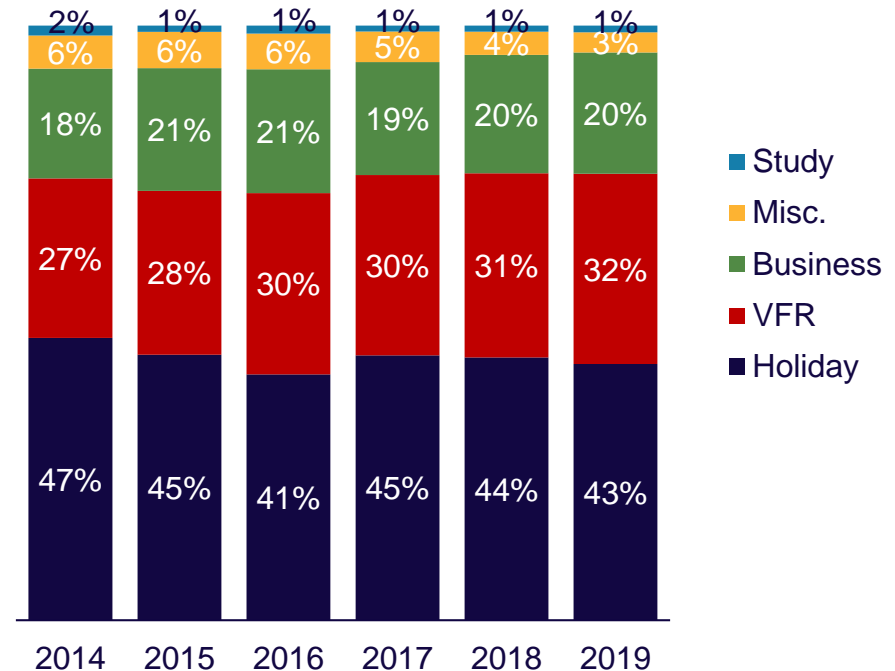


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised

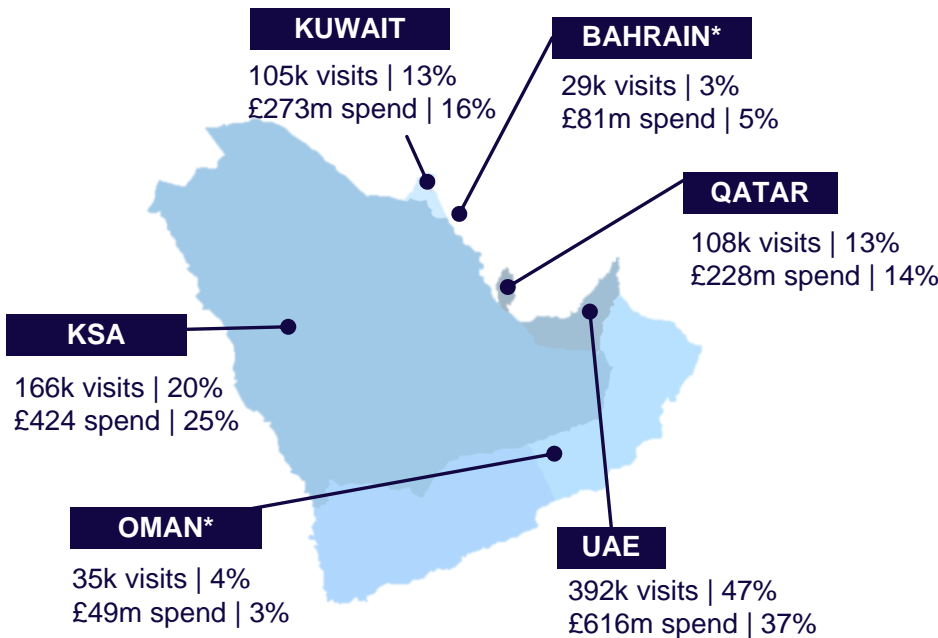


Changes to shares of journey purpose for French visitors are slight when comparing pre-revision and revised data. The VFR purpose gains 1 percentage point in 2014 and 2015, with the Holiday purpose losing 1 percentage point in kind in both those years.

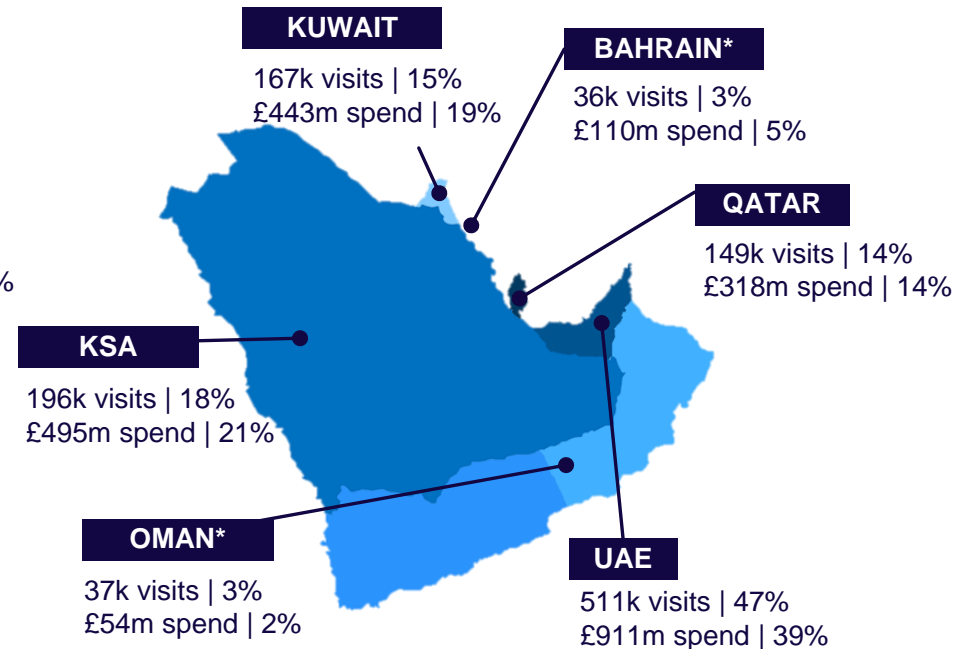


# What does tourism from the GCC look like now?

## Pre-revision (2018)



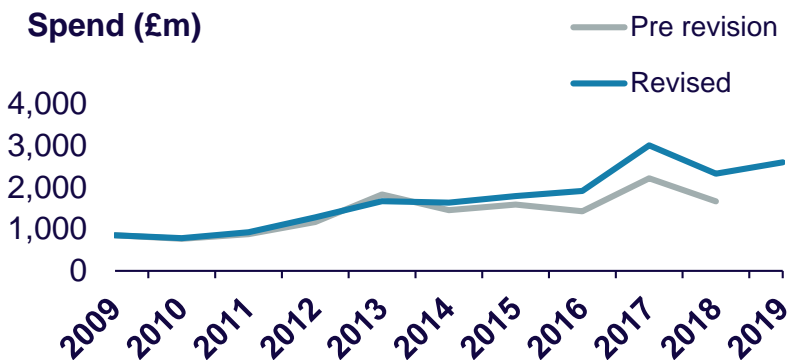
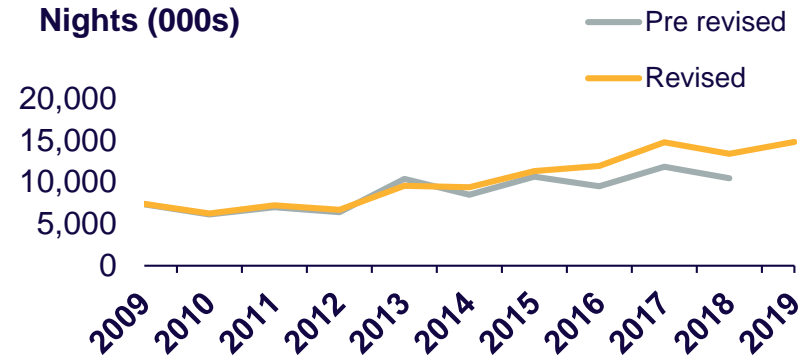
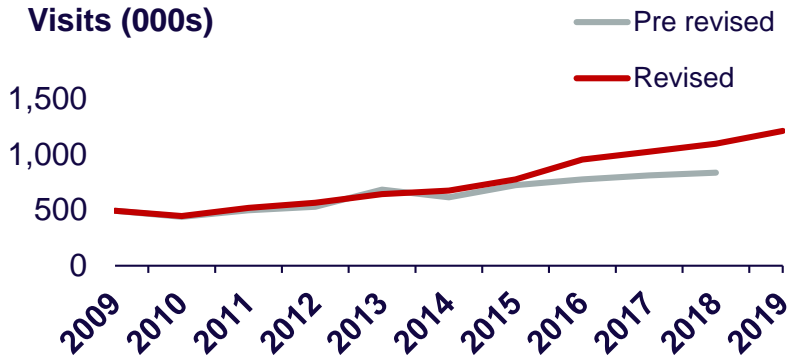
## Revised (2018)



Focusing on 2018, all GCC markets have gained in visits and spend when comparing pre-revision and revised data. However, the UAE has gained the most. Despite this, Kuwait is the GCC market which has gained the most share within the set – an increase of three percentage points for both visits and spend. Aside from Kuwait, Qatar has also gained one percentage point in share for visits.



# Inbound volume, value & nights | *Trend*



In general, estimates for inbound visits, nights and spend for the GCC have increased throughout 2009-2018 when comparing pre-revision and revised data. However, in 2013, estimates lowered slightly for all of these measures.

On average, estimates of visits have been increased by 79,000 visits, spend by £234 million, and nights by 974,000 nights per year.





# Inbound volume, value & nights | *Summary*

Year	Pre-revised visits (000s)	Revised visits (000s)	Change in visits estimate (000s)	Pre-revised spend (£m)	Revised spend (£m)	Change in spend estimate (£m)	Pre-revised nights (000s)	Revised nights (000s)	Change in nights estimate (000s)
2009	494	494	0	856	857	+1	7,353	7,405	+51
2010	440	446	+6	771	788	+17	6,136	6,256	+120
2011	499	519	+20	881	927	+46	7,013	7,238	+225
2012	530	566	+36	1,173	1,287	+114	6,419	6,697	+278
2013	684	644	-40	1,833	1,671	-161	10,398	9,572	-825
2014	615	675	+60	1,458	1,636	+178	8,510	9,414	+904
2015	724	777	+53	1,591	1,797	+206	10,672	11,340	+668
2016	777	954	+177	1,431	1,918	+487	9,521	11,960	+2,439
2017	812	1,024	+212	2,220	3,011	+791	11,867	14,807	+2,939
2018	836	1,097	+261	1,670	2,332	+662	10,479	13,424	+2,944
2019	NA	1,211	NA	NA	2,606	NA	NA	14,831	NA



## Spend per visit

Year	Pre-revised spend per visit (£)	Revised spend per visit (£)	Change in spend per visit estimate (£)
2009	£1,733	£1,736	<b>+£3</b>
2010	£1,754	£1,767	<b>+£14</b>
2011	£1,766	£1,786	<b>+£20</b>
2012	£2,214	£2,274	<b>+£59</b>
2013	£2,680	£2,595	<b>-£85</b>
2014	£2,372	£2,424	<b>+£52</b>
2015	£2,198	£2,314	<b>+£115</b>
2016	£1,842	£2,011	<b>+£168</b>
2017	£2,733	£2,939	<b>+£206</b>
2018	£1,997	£2,125	<b>+£128</b>
2019	NA	£2,151	NA

## Nights per visit

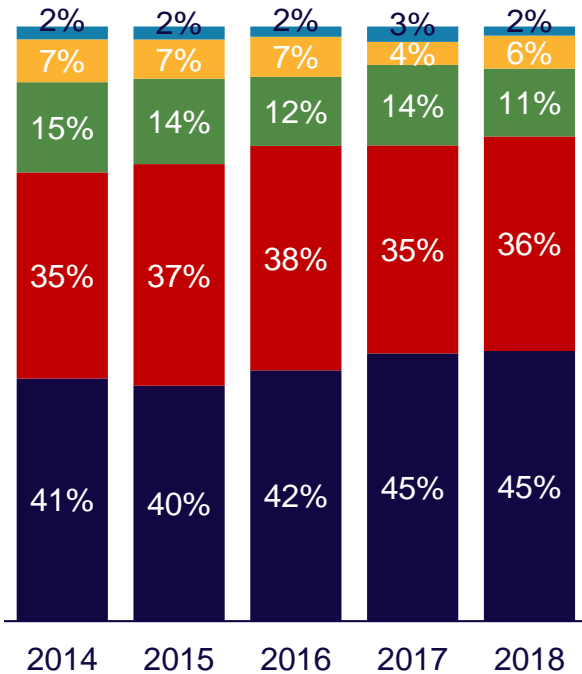
Year	Pre-revised nights per visit	Revised nights per visit	Change in nights per visit estimate
2009	14.9	15.0	<b>+0.1</b>
2010	14.0	14.0	<b>+0.1</b>
2011	14.1	13.9	<b>-0.1</b>
2012	12.1	11.8	<b>-0.3</b>
2013	15.2	14.9	<b>-0.3</b>
2014	13.8	13.9	<b>+0.1</b>
2015	14.7	14.6	<b>-0.1</b>
2016	12.3	12.5	<b>+0.3</b>
2017	14.6	14.5	<b>-0.2</b>
2018	12.5	12.2	<b>-0.3</b>
2019	NA	12.2	NA

In general, estimates of spend per visit for GCC visits to the UK have increased when comparing pre-revised with revised data. On average, these estimates have increased by £68 per visit, per year. However, estimates of nights per visit are slightly more likely to decrease than to increase within the period from 2009 to 2018. Therefore, on average, estimates of nights per visit have lowered by 0.1 night per year.

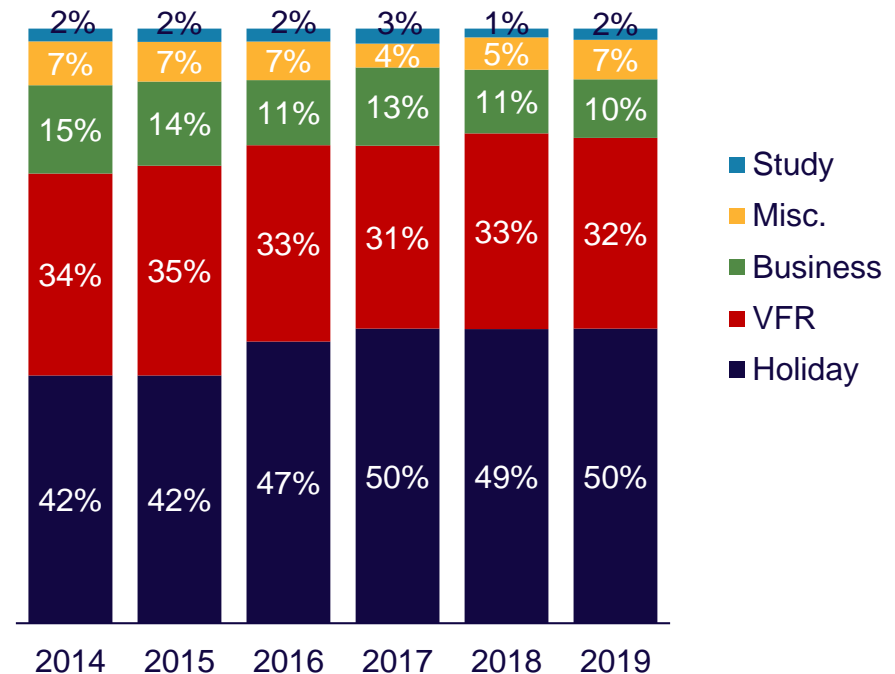


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised



There are noticeable changes to journey purpose of Gulf visitors when comparing pre-revision and revised data. The Holiday journey purpose consistently gains share throughout 2014 to 2018, with the most gains seen in 2016. In contrast, the VFR purpose consistently loses share, and Business loses some share in 2016 and 2018.



# Inbound volume, value & nights | Summary

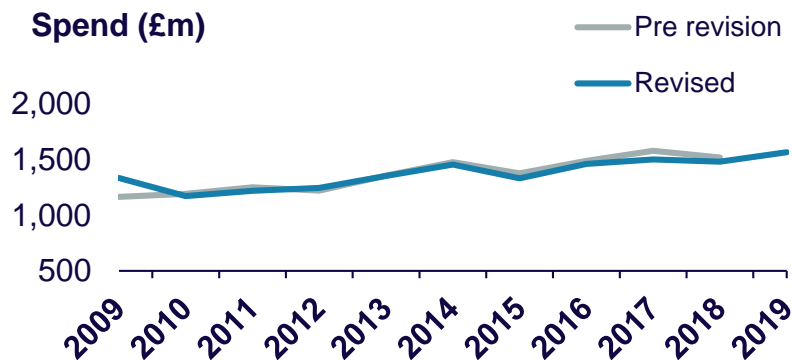
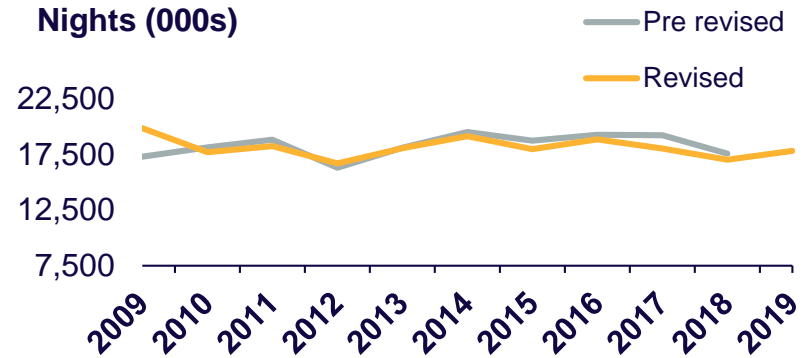
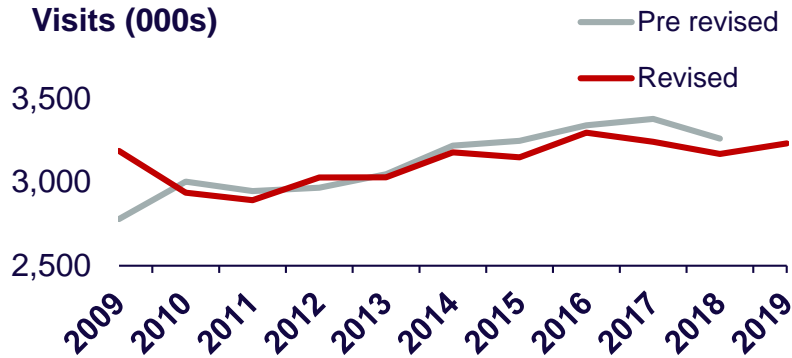
Year	Pre-revised visits (000s)	Revised visits (000s)	Change in visits estimate (000s)	Pre-revised spend (£m)	Revised spend (£m)	Change in spend estimate (£m)	Pre-revised nights (000s)	Revised nights (000s)	Change in nights estimate (000s)
2009	246	243	-3	312	314	+1	2,863	2,864	+1
2010	213	216	+3	312	323	+10	2,872	2,948	+76
2011	241	250	+9	254	272	+17	2,831	2,921	+91
2012	256	264	+8	467	468	+1	2,897	2,975	+78
2013	304	283	-21	610	566	-43	3,848	3,550	-299
2014	260	271	+12	437	452	+15	2,569	2,702	+134
2015	347	364	+16	487	535	+48	4,107	4,185	+78
2016	365	413	+47	566	661	+95	3,551	3,925	+374
2017	374	438	+64	618	820	+203	4,145	4,898	+753
2018	392	511	+119	616	911	+295	3,528	4,658	+1,129
2019	NA	553	NA	NA	869	NA	NA	5,126	NA

# Inbound volume, value & nights | Summary

Year	Pre-revised visits (000s)	Revised visits (000s)	Change in visits estimate (000s)	Pre-revised spend (£m)	Revised spend (£m)	Change in spend estimate (£m)	Pre-revised nights (000s)	Revised nights (000s)	Change in nights estimate (000s)
2009	89	96	+8	206	222	+17	1,550	1,732	+182
2010	79	84	+5	190	200	+10	923	1,012	+90
2011	105	114	+9	260	285	+25	1,890	2,010	+119
2012	111	124	+13	260	292	+32	1,463	1,536	+74
2013	126	136	+11	322	336	+14	2,348	2,388	+40
2014	144	164	+20	365	414	+49	2,279	2,482	+203
2015	147	166	+19	556	665	+110	2,699	3,061	+362
2016	152	222	+70	360	549	+189	2,464	3,600	+1,136
2017	161	207	+46	862	1,081	+219	3,158	3,765	+607
2018	166	196	+30	424	495	+71	2,709	3,104	+395
2019	NA	221	NA	NA	627	NA	NA	3,509	NA



# Inbound volume, value & nights | *Trend*



In general, estimates for inbound visits, nights and spend for Germany have lowered throughout 2010-2018 when comparing pre-revision and revised data. However, in 2009 and 2012, estimates for all measures increased. On average, estimates of visits have been lowered by 8,000 visits, spend by £7 million, and nights by 140,000 nights per year.



# Inbound volume, value & nights | *Summary*

Year	Pre-revised visits (000s)	Revised visits (000s)	Change in visits estimate (000s)	Pre-revised spend (£m)	Revised spend (£m)	Change in spend estimate (£m)	Pre-revised nights (000s)	Revised nights (000s)	Change in nights estimate (000s)
2009	2,780	3,188	+409	1,167	1,337	+170	17,300	19,865	+2,565
2010	3,004	2,938	-66	1,193	1,173	-20	18,143	17,707	-436
2011	2,947	2,892	-55	1,252	1,221	-31	18,822	18,258	-564
2012	2,967	3,029	+62	1,223	1,246	+23	16,306	16,701	+395
2013	3,048	3,030	-18	1,358	1,354	-4	18,113	18,062	-51
2014	3,220	3,180	-40	1,478	1,457	-21	19,523	19,138	-385
2015	3,249	3,150	-99	1,378	1,333	-45	18,742	17,982	-760
2016	3,341	3,297	-44	1,490	1,462	-28	19,273	18,857	-417
2017	3,380	3,243	-138	1,581	1,503	-78	19,233	18,031	-1,202
2018	3,262	3,170	-92	1,520	1,483	-37	17,577	17,028	-548
2019	NA	3,233	NA	NA	1,567	NA	NA	17,824	NA



## Spend per visit

Year	Pre-revised spend per visit (£)	Revised spend per visit (£)	Change in spend per visit estimate (£)
2009	£420	£419	<b>-£1</b>
2010	£397	£399	<b>+£2</b>
2011	£425	£422	<b>-£3</b>
2012	£412	£411	<b>-£1</b>
2013	£445	£447	<b>+£2</b>
2014	£459	£458	<b>-£1</b>
2015	£424	£423	<b>-£1</b>
2016	£446	£443	<b>-£3</b>
2017	£468	£464	<b>-£4</b>
2018	£466	£468	<b>+£2</b>
2019	NA	£485	NA

## Nights per visit

Year	Pre-revised nights per visit	Revised nights per visit	Change in nights per visit estimate
2009	6.2	6.2	<b>0.0</b>
2010	6.0	6.0	<b>0.0</b>
2011	6.4	6.3	<b>-0.1</b>
2012	5.5	5.5	<b>0.0</b>
2013	5.9	6.0	<b>0.0</b>
2014	6.1	6.0	<b>0.0</b>
2015	5.8	5.7	<b>-0.1</b>
2016	5.8	5.7	<b>0.0</b>
2017	5.7	5.6	<b>-0.1</b>
2018	5.4	5.4	<b>0.0</b>
2019	NA	5.5	NA

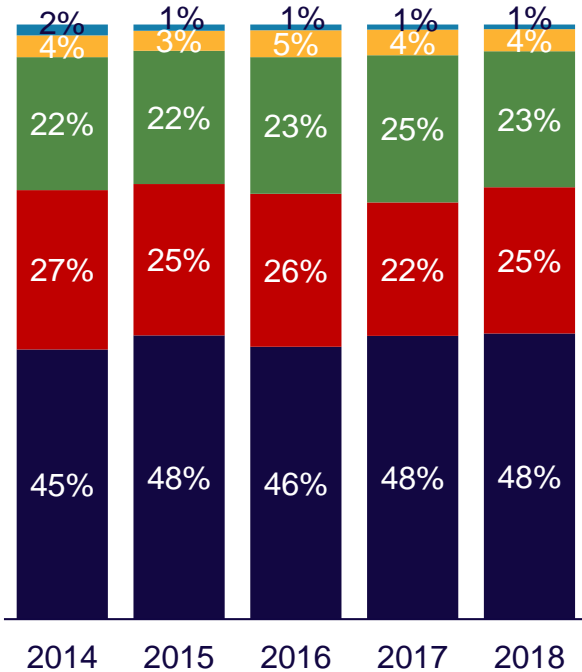
In general, estimates of nights per visit of German visitors in the UK have stayed the same when comparing pre-revised and revised data from 2009 to 2018. Similarly, increases and decreases of estimates of spend per visit flex from year to year, meaning that on average, estimates decrease by £1 per visit per year.



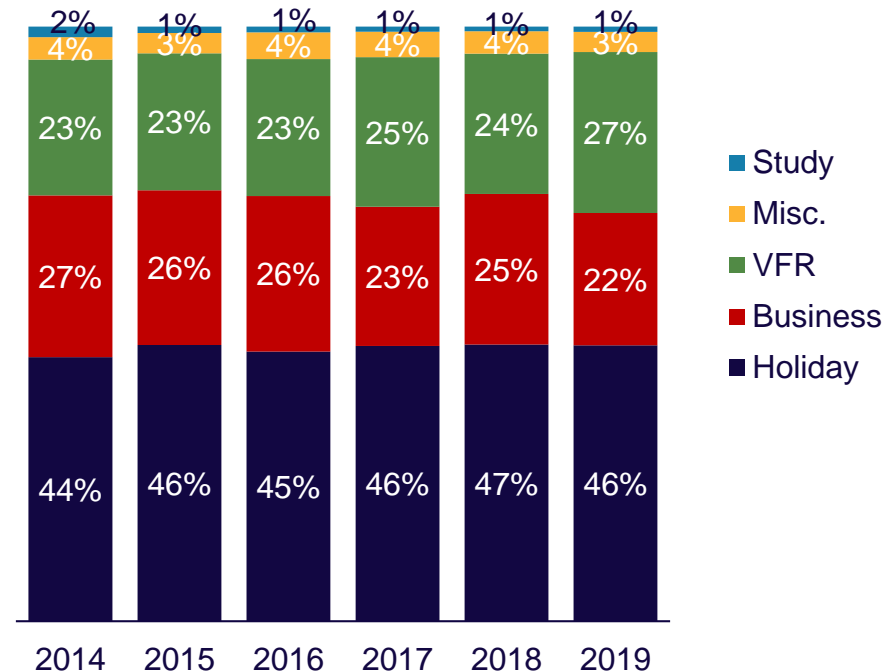


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised

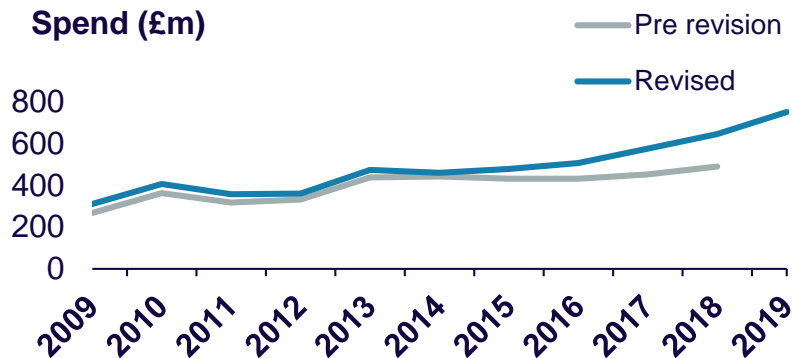
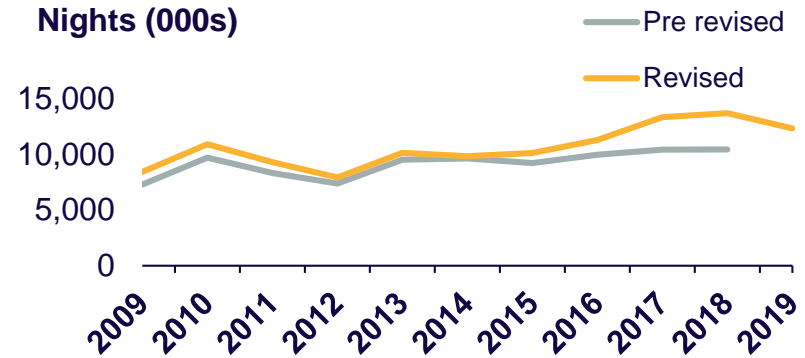
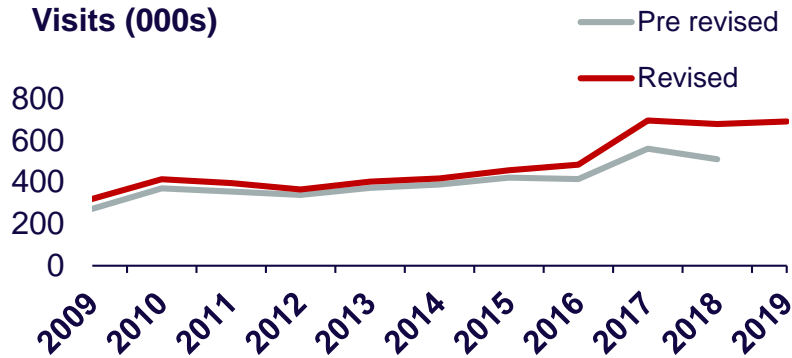


When comparing share of journey purposes of German visitors in pre-revised vs. revised data, we can see that Business and VFR purposes are most likely to gain share from 2014 to 2018, with the exception of 2016, where no changes are seen. In contrast, The Holiday purpose loses share in all years apart from 2016.

Notes: 'VFR' means 'visiting friends and relatives'.



# Inbound volume, value & nights | *Trend*



India has seen consistent gains in visits, nights and spend each year from 2009 to 2018 when comparing pre-revised with revised data. These gains also increase significantly in later years. The most visits, nights and spend are gained in 2018, with 169,000 visits, £156 million spend and 3.3 million nights gained.



# Inbound volume, value & nights | *Summary*

Year	Pre-revised visits (000s)	Revised visits (000s)	Change in visits estimate (000s)	Pre-revised spend (£m)	Revised spend (£m)	Change in spend estimate (£m)	Pre-revised nights (000s)	Revised nights (000s)	Change in nights estimate (000s)
2009	273	320	+47	269	311	+43	7,293	8,430	+1,137
2010	371	415	+44	363	407	+44	9,720	10,927	+1,207
2011	355	396	+41	318	358	+40	8,341	9,315	+974
2012	339	366	+26	333	362	+29	7,381	7,932	+551
2013	373	403	+30	439	475	+36	9,534	10,153	+619
2014	390	418	+29	444	461	+18	9,644	9,846	+202
2015	422	458	+35	433	480	+47	9,224	10,139	+915
2016	415	484	+69	433	508	+75	9,969	11,295	+1,326
2017	562	696	+135	454	577	+123	10,437	13,365	+2,928
2018	511	680	+169	491	647	+156	10,449	13,716	+3,267
2019	NA	692	NA	NA	753	NA	NA	12,356	NA



## Spend per visit

Year	Pre-revised spend per visit (£)	Revised spend per visit (£)	Change in spend per visit estimate (£)
2009	£986	£972	<b>-£13</b>
2010	£980	£982	<b>+£2</b>
2011	£896	£904	<b>+£8</b>
2012	£981	£989	<b>+£8</b>
2013	£1,176	£1,178	<b>+£2</b>
2014	£1,139	£1,103	<b>-£36</b>
2015	£1,025	£1,048	<b>+£23</b>
2016	£1,042	£1,049	<b>+£7</b>
2017	£808	£829	<b>+£21</b>
2018	£961	£952	<b>-£10</b>
2019	NA	£1,088	NA

## Nights per visit

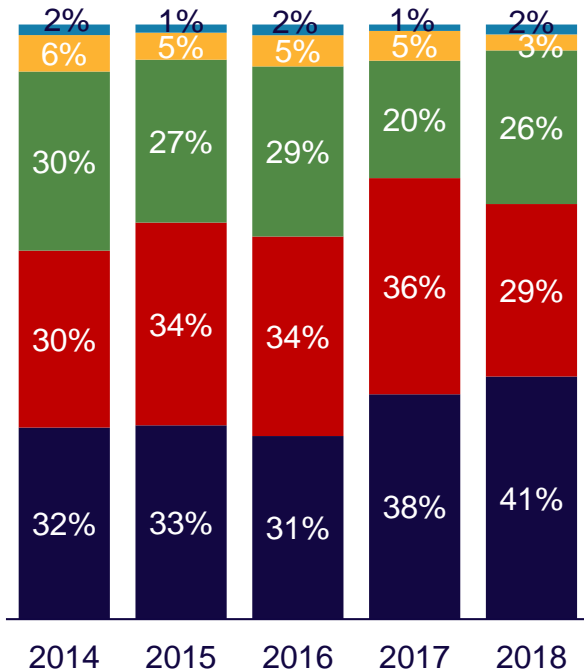
Year	Pre-revised nights per visit	Revised nights per visit	Change in nights per visit estimate
2009	26.7	26.3	<b>-0.4</b>
2010	26.2	26.3	<b>+0.1</b>
2011	23.5	23.5	<b>+0.0</b>
2012	21.7	21.7	<b>-0.1</b>
2013	25.6	25.2	<b>-0.4</b>
2014	24.8	23.5	<b>-1.2</b>
2015	21.8	22.1	<b>+0.3</b>
2016	24.0	23.3	<b>-0.7</b>
2017	18.6	19.2	<b>+0.6</b>
2018	20.5	20.2	<b>-0.3</b>
2019	NA	17.9	NA

Changes in estimates of spend per visit and nights per visit of Indian visitors in the UK vary per year from 2009 to 2018. However, on average, changes are not significant, with estimates of spend per visit increasing by £1 per year, and estimates of nights per visit decreasing by 0.2 nights per year.

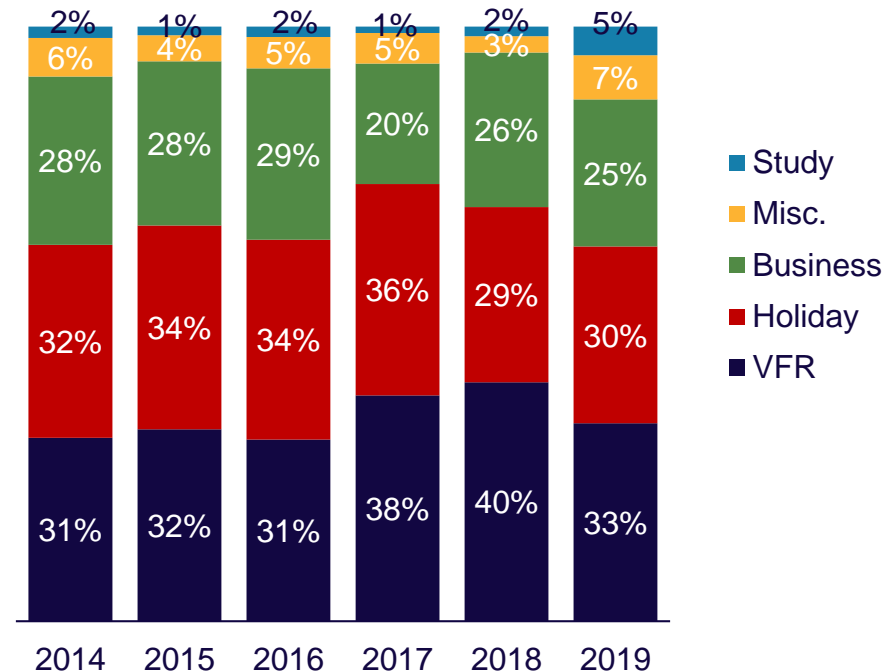


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised

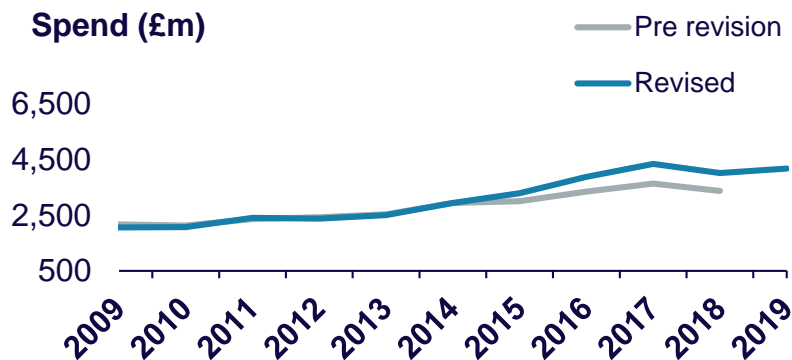
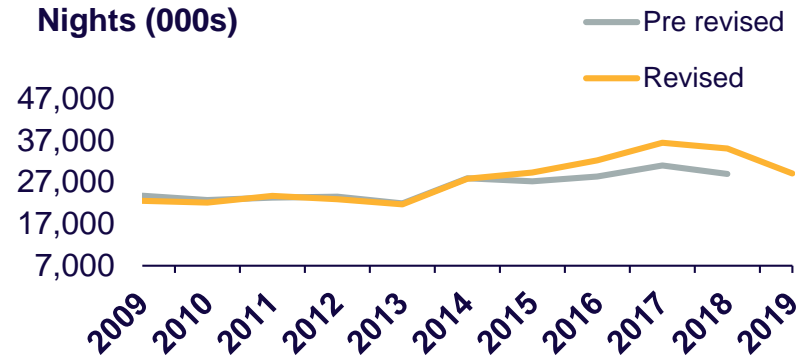
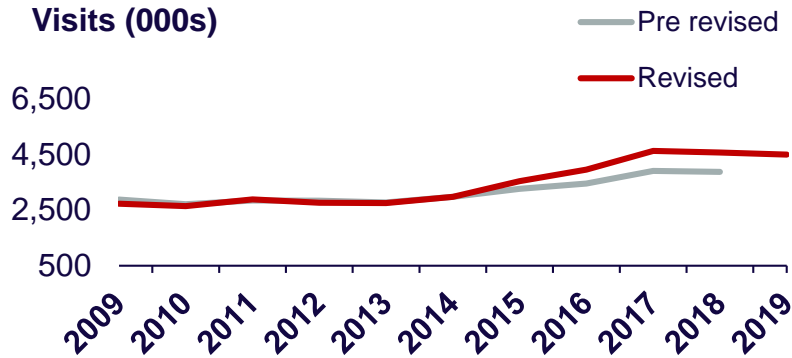


When comparing share of journey purposes of Indian visitors in pre-revised vs. revised data, we can see that 2014 demonstrates the most changes. In that year, the Holiday purpose gained three percentage points in share, with Business losing 2 points, and VFR 1 point, in turn. In 2017 and 2018 there are minor differences: Holiday losing some share but business gaining some in 2017, and VFR losing on percentage point in share in 2018.

Notes: 'VFR' means 'visiting friends and relatives'.



# Inbound volume, value & nights | *Trend*



When comparing pre-revised and revised data for the USA, gains in visits, nights and spend are seen in 2011, and 2015 onwards.

On average, the USA has gained 190,000 visits, £197 million in spend, and 1.5 million nights per year from 2009-2018.

The most visits and spend are gained in 2017, but the most nights are gained in 2018.



# Inbound volume, value & nights | *Summary*

Year	Pre-revised visits (000s)	Revised visits (000s)	Change in visits estimate (000s)	Pre-revised spend (£m)	Revised spend (£m)	Change in spend estimate (£m)	Pre-revised nights (000s)	Revised nights (000s)	Change in nights estimate (000s)
2009	2,877	2,727	-150	2,173	2,063	-110	23,771	22,558	-1,213
2010	2,711	2,640	-70	2,133	2,077	-56	22,739	22,142	-597
2011	2,846	2,884	+38	2,362	2,408	+46	23,333	23,755	+422
2012	2,840	2,763	-77	2,436	2,381	-55	23,568	22,941	-627
2013	2,778	2,750	-28	2,539	2,509	-29	21,927	21,724	-203
2014	2,976	2,977	+1	2,944	2,946	+2	27,975	27,840	-135
2015	3,266	3,538	+272	3,010	3,297	+287	27,239	29,330	+2,092
2016	3,455	3,954	+499	3,354	3,885	+531	28,394	32,262	+3,868
2017	3,910	4,631	+721	3,643	4,349	+706	31,024	36,497	+5,472
2018	3,877	4,571	+694	3,378	4,025	+647	28,981	35,097	+6,116
2019	NA	4,499	NA	NA	4,184	NA	NA	29,100	NA



## Spend per visit

Year	Pre-revised spend per visit (£)	Revised spend per visit (£)	Change in spend per visit estimate (£)
2009	£755	£756	+£1
2010	£787	£787	£0
2011	£830	£835	+£5
2012	£858	£862	+£4
2013	£914	£912	-£2
2014	£989	£989	£0
2015	£922	£932	+£10
2016	£971	£982	+£12
2017	£932	£939	+£7
2018	£871	£880	+£9
2019	NA	£930	NA

## Nights per visit

Year	Pre-revised nights per visit	Revised nights per visit	Change in nights per visit estimate
2009	8.3	8.3	0.0
2010	8.4	8.4	0.0
2011	8.2	8.2	0.0
2012	8.3	8.3	0.0
2013	7.9	7.9	0.0
2014	9.4	9.4	0.0
2015	8.3	8.3	0.0
2016	8.2	8.2	-0.1
2017	7.9	7.9	-0.1
2018	7.5	7.7	+0.2
2019	NA	6.5	NA

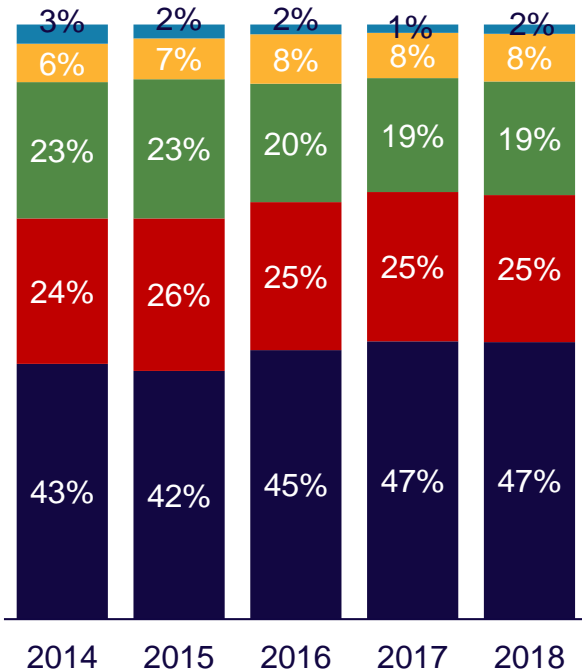
Changes in estimates of spend per visit and nights per visit of American visitors in the UK vary per year from 2009 to 2018. However, on average, changes are not significant, with estimates of spend per visit increasing by £5 per year, and estimates of nights per visit staying the same – these only showed changes in 2016-2018.



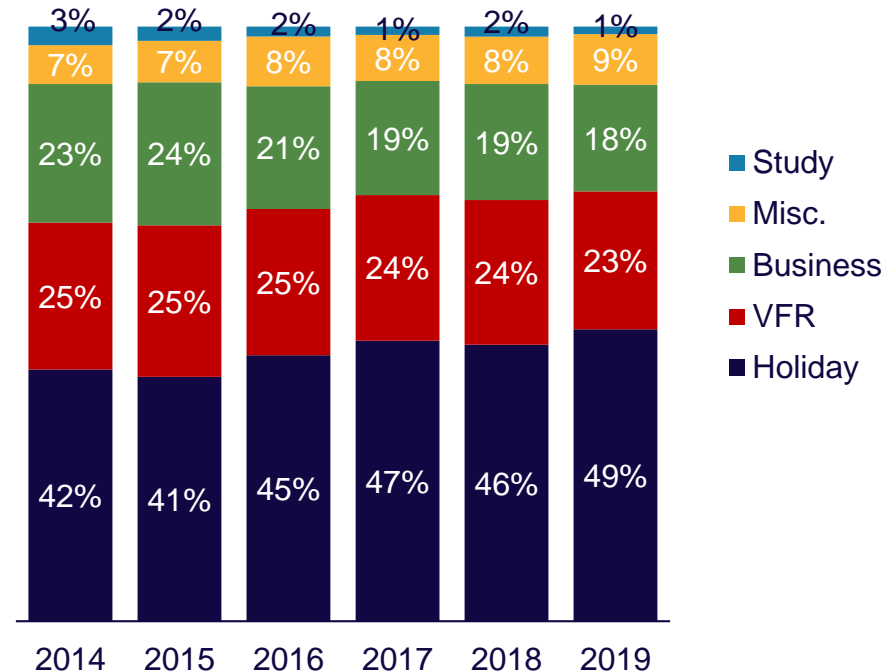


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised



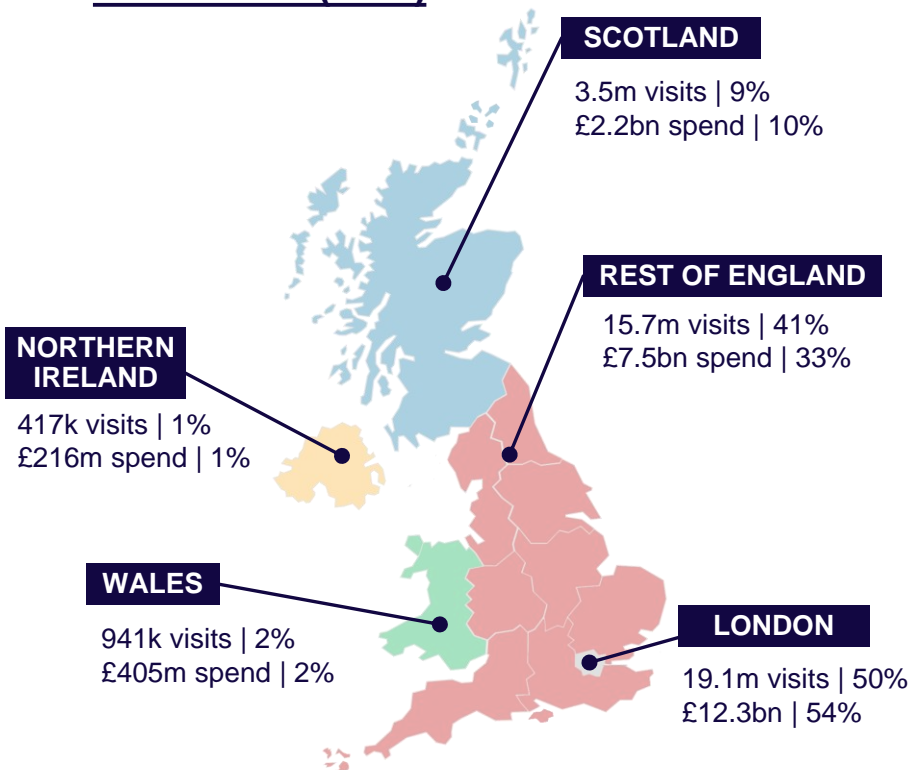
Changes to shares of journey purpose for American visitors are slight when comparing pre-revision and revised data. The Business journey purpose gains some share in 2015 and 2016, with Holiday losing 1 percentage point in 2014 and 2015. Additionally, the VFR purpose loses 1 percentage point in 2017.



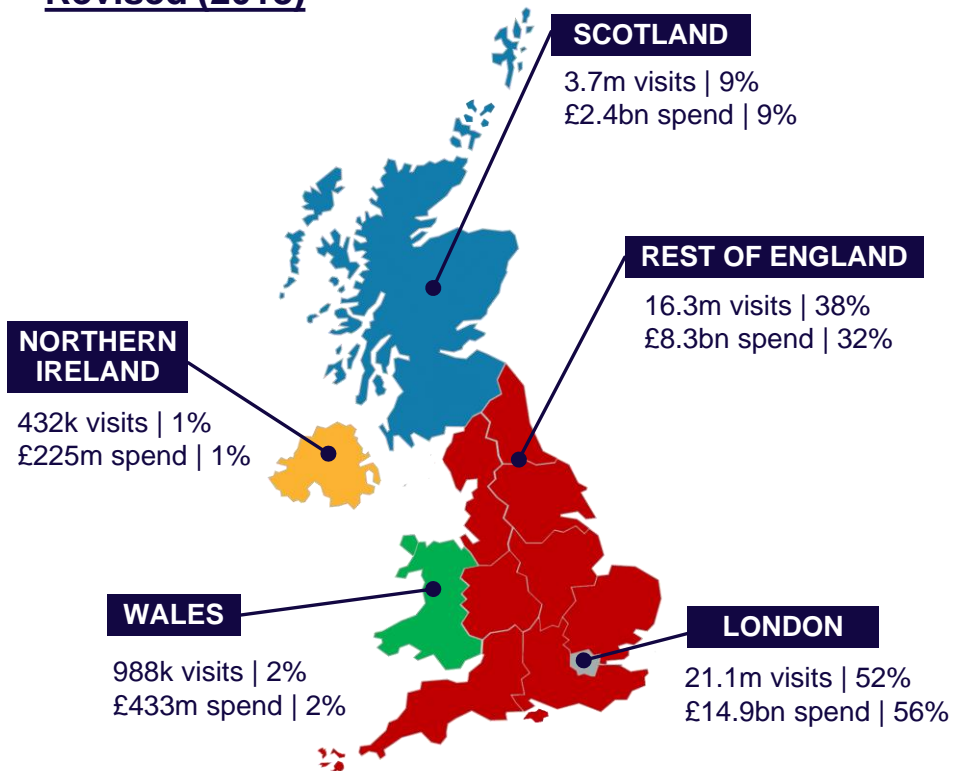
### 3. Inbound tourism across the UK's nations and regions

# What does UK inbound tourism look like now?

## Pre-revision (2018)



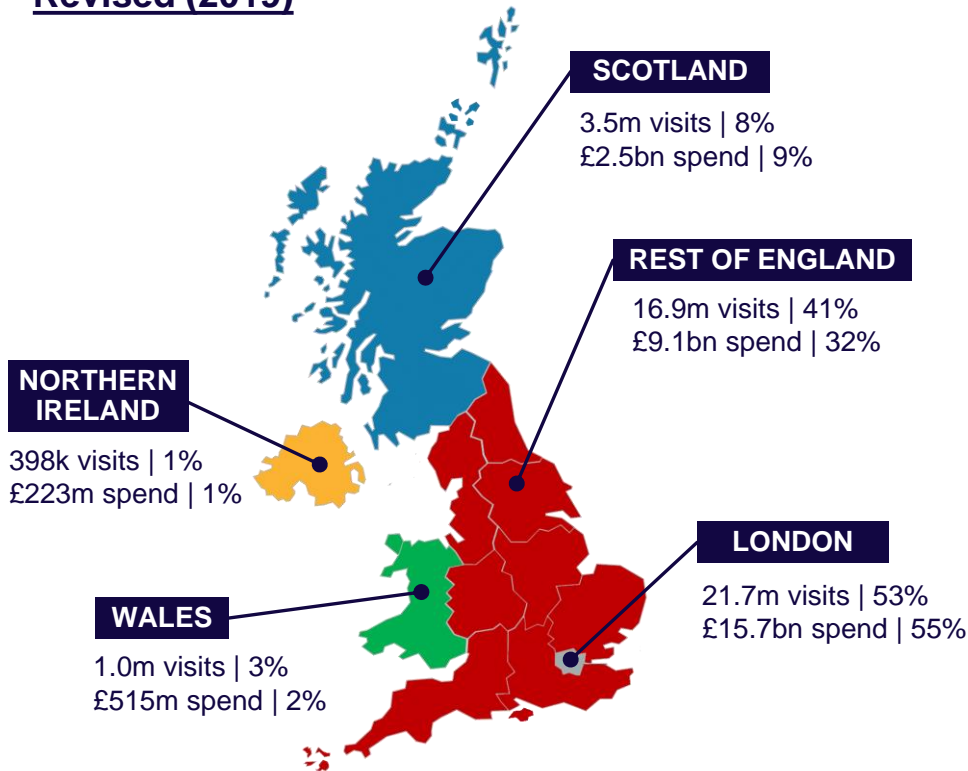
## Revised (2018)



Focussing on 2018, London is the region which has gained most in terms of visits, spend and share for both of these measures in the revised data. Following London is the Rest of England, which has gained in visits and spend, but marginally lost share for spend. Overall, relative share of inbound tourism across the UK is still comparable.

# What does UK inbound tourism look like now?

Revised (2019)



Focussing on 2019, a very similar regional spread in terms of share of visits and spend is seen across the UK as in the revised 2018 picture. The Rest of England has gained 3 percentage points in share for visits. London gains some share of visits, but loses 1 percentage point in share of spend. Finally, Scotland has lost 1 percentage point in share for visits.

## Regional spread | *Visits*

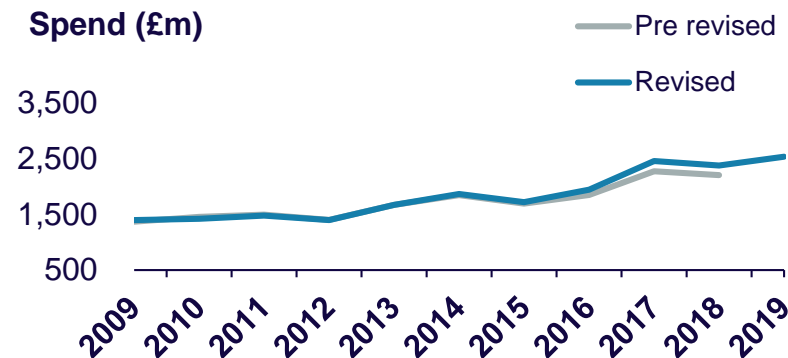
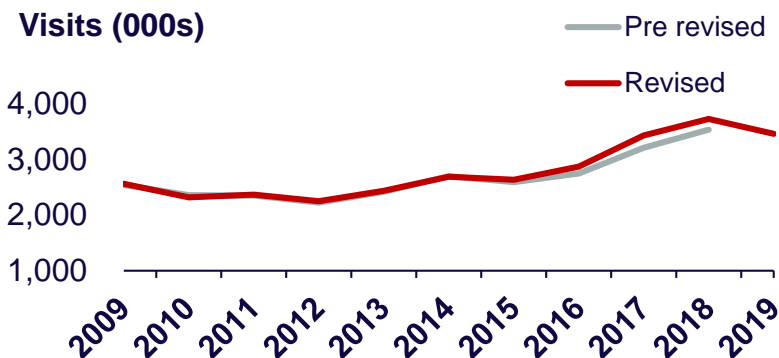
Region	2014	2015	2016	2017	2018	2019
<b>Scotland:</b> pre-revised visits (000s)	2,700	2,592	2,747	3,210	3,538	N/A
<b>Scotland:</b> revised visits (000s)	2,690	2,635	2,871	3,432	3,729	3,460
<b>Scotland:</b> change in estimate (000s)	-10	+43	+124	+222	+192	N/A
<b>Wales:</b> pre-revised visits (000s)	932	970	1,074	1,079	941	N/A
<b>Wales:</b> revised visits (000s)	935	958	1,080	1,112	988	1,023
<b>Wales:</b> change in estimate (000s)	+3	-11	+5	+33	+47	N/A
<b>London:</b> pre-revised visits (000s)	17,404	18,581	19,060	19,828	19,090	N/A
<b>London:</b> revised visits (000s)	18,189	19,385	20,533	21,708	21,072	21,713
<b>London:</b> change in estimate (000s)	+785	+804	+1,473	+1,880	+1,982	N/A
<b>Rest of England:</b> pre-revised visits (000s)	14,191	15,169	15,979	16,496	15,708	N/A
<b>Rest of England:</b> revised visits (000s)	14,503	15,254	16,306	16,784	16,336	16,937
<b>Rest of England:</b> change in estimate (000s)	+312	+85	+327	+288	+629	N/A

## Regional spread | Spend

Region	2014	2015	2016	2017	2018	2019
<b>Scotland: pre-revised spend (£m)</b>	1,846	1,695	1,850	2,276	2,206	N/A
<b>Scotland: revised spend (£m)</b>	1,868	1,720	1,944	2,459	2,379	2,538
<b>Scotland: change in estimate (£m)</b>	<b>+22</b>	<b>+24</b>	<b>+95</b>	<b>+183</b>	<b>+173</b>	N/A
<b>Wales: pre-revised spend (£m)</b>	368	410	444	369	405	N/A
<b>Wales: revised spend (£m)</b>	373	409	507	397	433	515
<b>Wales: change in estimate (£m)</b>	<b>+5</b>	<b>-1</b>	<b>+64</b>	<b>+29</b>	<b>+29</b>	N/A
<b>London: pre-revised spend (£m)</b>	11,825	11,919	11,869	13,547	12,329	N/A
<b>London: revised spend (£m)</b>	12,737	13,131	13,815	16,267	14,863	15,725
<b>London: change in estimate (£m)</b>	<b>+912</b>	<b>+1,212</b>	<b>+1,947</b>	<b>+2,721</b>	<b>+2,534</b>	N/A
<b>Rest of England: pre-revised spend (£m)</b>	7,252	7,508	7,818	7,814	7,463	N/A
<b>Rest of England: revised spend (£m)</b>	7,878	8,021	8,568	8,673	8,262	9,055
<b>Rest of England: change in estimate (£m)</b>	<b>+626</b>	<b>+513</b>	<b>+751</b>	<b>+859</b>	<b>+799</b>	N/A



# Inbound trend & top source markets



## Top source markets\*

Ranking	Visits	Spend
<b>Pre-revised (2009-2018)</b>	USA, Germany, France, Netherlands, Australia, Irish Republic, Spain, Italy, Canada, Norway	USA, Germany, France, Australia, Canada, Spain, Netherlands, Italy, Norway, Irish Republic
<b>Revised (2009-2018)</b>	USA, Germany, France, Netherlands, Spain, Italy, Australia, Irish Republic, Canada, Norway	USA, Germany, France, Australia, Canada, Spain, Italy, Netherlands, China, Norway

In general, a positive trend is seen when comparing revised and pre-revised data for Scotland, with an average gain of 61,000 visits per year from 2009-2018, and £47 million in the same period.

When examining the revised top source markets from 2009-2018, Spain has gained two ranks for visits, and Italy one for spend. Also, China makes a new appearance in the top 10 for spend, ahead of Norway and pushing out the Irish Republic.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' data.



## Inbound volume & value

Year	Pre-revised visits (000s)	Pre-revised visit share	Revised visits (000s)	Revised visit share	Pre-revised spend (£m)	Pre-revised spend share	Revised spend (£m)	Revised spend share
2009	2,544	9%	2,564	8%	1,369	8%	1,397	8%
2010	2,358	8%	2,319	8%	1,455	9%	1,422	8%
2011	2,350	8%	2,367	7%	1,494	8%	1,479	8%
2012	2,225	7%	2,249	7%	1,401	8%	1,398	7%
2013	2,421	7%	2,436	7%	1,671	8%	1,671	8%
2014	2,700	8%	2,690	8%	1,846	8%	1,868	8%
2015	2,592	7%	2,635	7%	1,695	8%	1,720	7%
2016	2,747	7%	2,871	7%	1,850	8%	1,944	8%
2017	3,210	8%	3,432	8%	2,276	9%	2,459	9%
2018	3,538	9%	3,729	9%	2,206	10%	2,379	9%
2019	N/A	N/A	3,460	8%	N/A	N/A	2,538	9%

The overall pattern when comparing pre-revised data and revised data for Scotland reveals a gain in estimates of visits and spend in later years within 2009-2018, but a lowering of estimates in general in earlier years, particularly for spend.

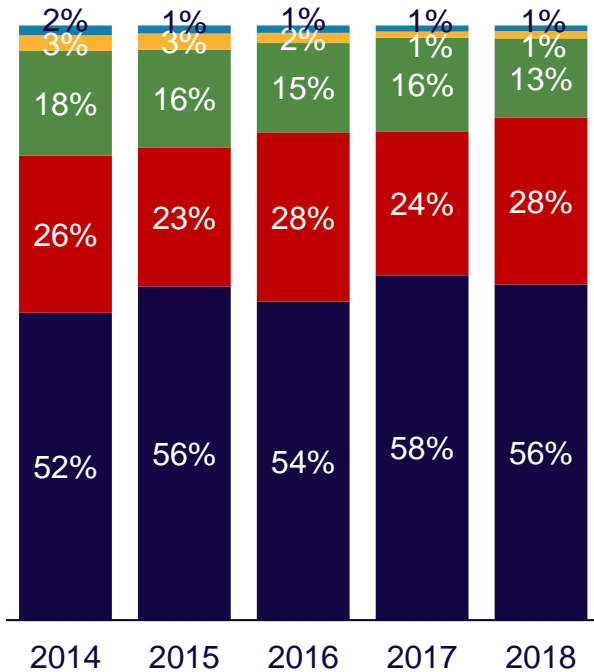
The year demonstrating the highest gains in both measures is 2017, and the year which shows the largest lowering in estimates is 2010. In general, share of the region within the UK for visits and spend has remained similar.



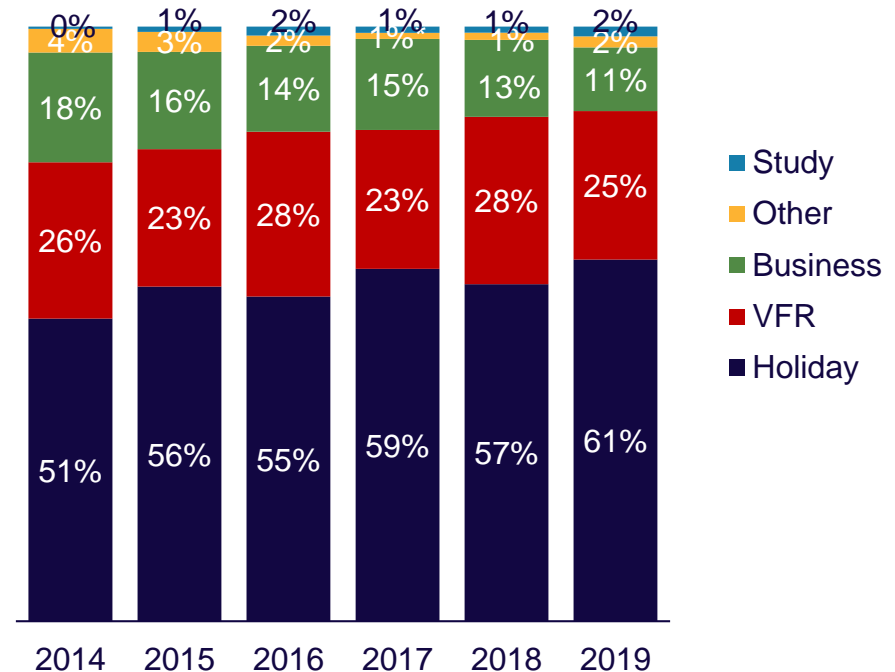


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised

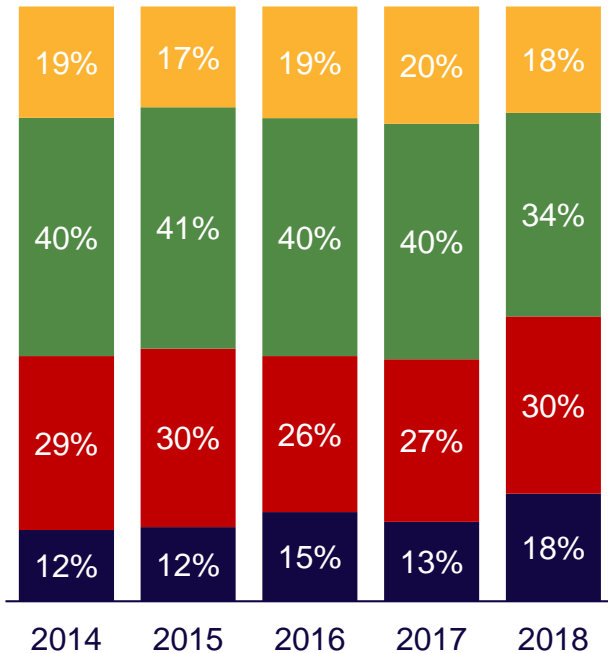


Share of visitors from different journey purposes has remained similar when comparing pre-revised and revised data for Scotland from 2014-2018. The Business and Other purposes gained 1 percentage point of share each in 2014, Other gained 1 percentage point in 2015, and Holiday gained 1 percentage point of share in 2016 and 2017.

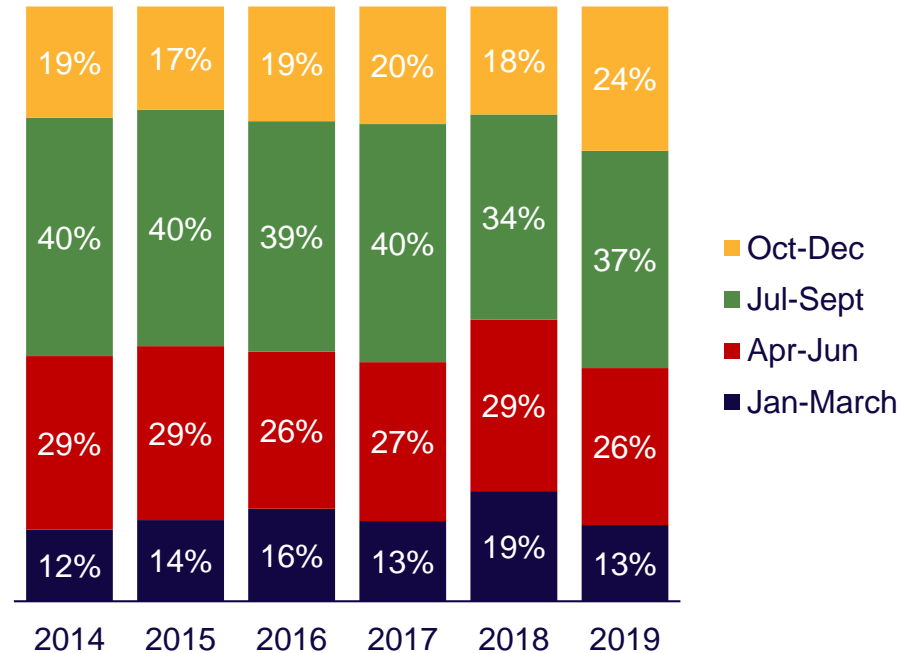


# Seasonality

Percentage of visits: pre-revision



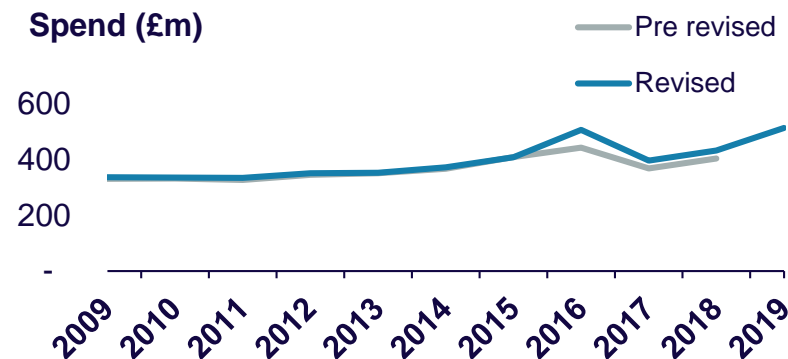
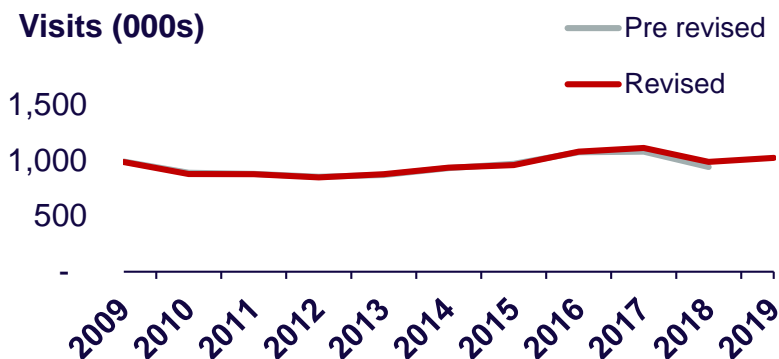
Percentage of visits: revised



Changes in seasonality of inbound visits are slight when comparing pre-revised and revised data for Scotland. Share of quarter one increased marginally in 2015 and 2016. Quarter four also slightly gained in 2016. In contrast, quarter two lost 1 percentage point of share in 2015, 2017 and 2018, and quarter three loses the same in 2015 and 2016.



# Inbound trend & top source markets



## Top source markets\*

Ranking	Visits	Spend
<b>Pre-revised (2009-2018)</b>	Irish Republic, France, Germany, USA, Australia, Netherlands, Spain, Poland, Italy, Canada	USA, Irish Republic, France, Germany, Australia, Netherlands, Spain, Italy, Canada, UAE
<b>Revised (2009-2018)</b>	Irish Republic, France, USA, Germany, Netherlands, Australia, Spain, Poland, Italy, Canada	USA, Irish Republic, Germany, France, Australia, Spain, Netherlands, China, Italy, Canada

Revisions have been small when comparing revised and pre-revised data for Wales, with an average gain of 6,000 visits per year from 2009-2018, and £15 million in the same period, with larger revisions in recent years. When examining the revised top source markets from 2009-2018, the USA and Netherlands have gained one place each for visits. Germany and Spain have gained one place each for spend, with China a new market in the top 10, and UAE dropping out.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' data.



## Inbound volume & value

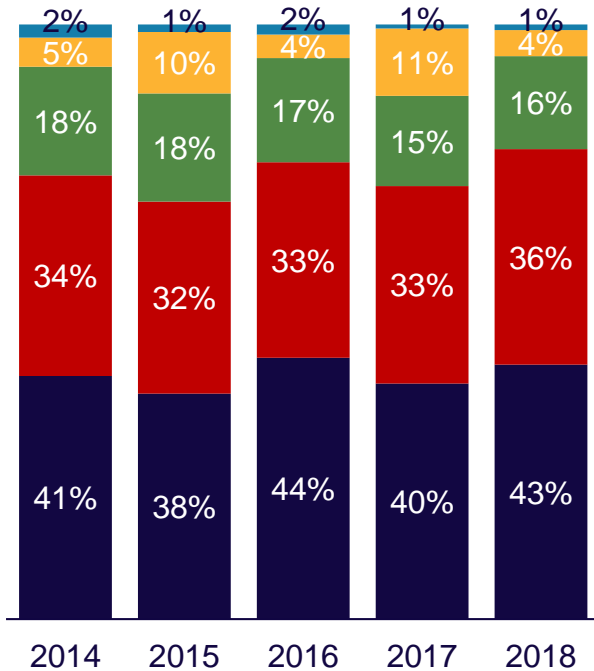
Year	Pre-revised visits (000s)	Pre-revised visit share	Revised visits (000s)	Revised visit share	Pre-revised spend (£m)	Pre-revised spend share	Revised spend (£m)	Revised spend share
2009	991	3%	986	3%	332	2%	337	2%
2010	890	3%	878	3%	333	2%	336	2%
2011	879	3%	877	3%	328	2%	335	2%
2012	854	3%	848	3%	346	2%	352	2%
2013	869	3%	877	3%	352	2%	353	2%
2014	932	3%	935	3%	368	2%	373	2%
2015	970	3%	958	3%	410	2%	409	2%
2016	1,074	3%	1,080	3%	444	2%	507	2%
2017	1,079	3%	1,112	3%	369	2%	397	1%
2018	941	2%	988	2%	405	2%	433	2%
2019	N/A	N/A	1,023	3%	N/A	N/A	515	2%

The overall pattern when comparing pre-revised data and revised data for Wales reveals a gain in estimates of visits and spend in later years within 2009-2018, but some lowering of estimates for visits in earlier years. The year demonstrating the highest gain in visits is 2018, with spend increasing the most in 2016. In general, share of the region within the UK for visits and spend has remained similar.

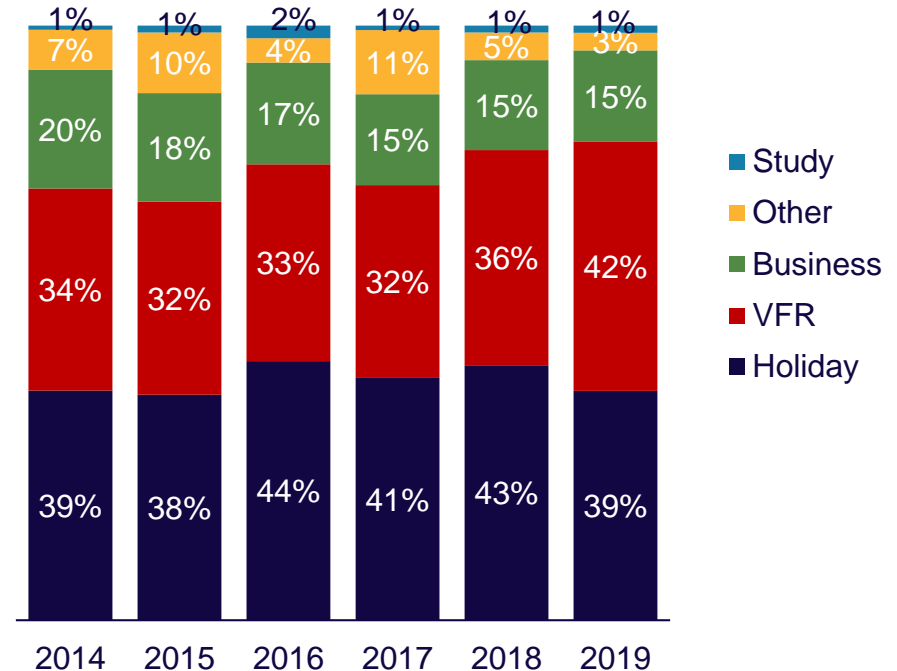


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised

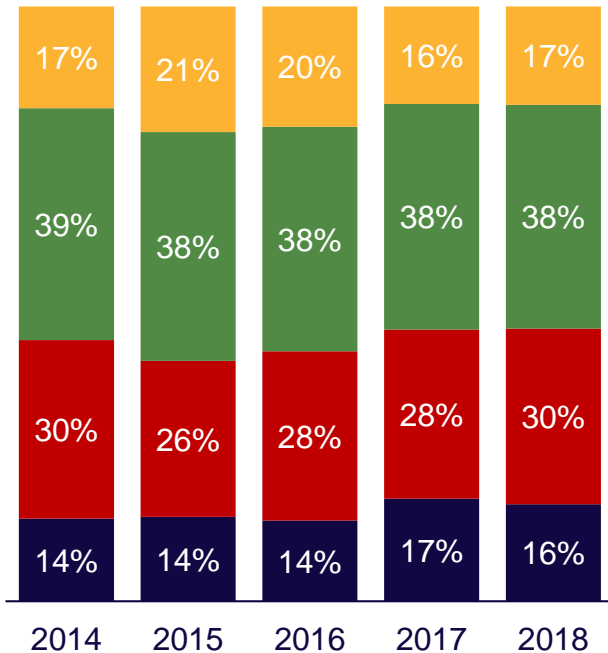


Share of visitors from different journey purposes has remained similar when comparing pre-revised and revised data for Wales from 2014-2018. However, the Business and 'Other' journey purposes gained 2 percentage points each in 2014, with Holiday and Study losing share in kind. Also, Holiday gained 1 percentage point on VFR and 'other' in 2017.

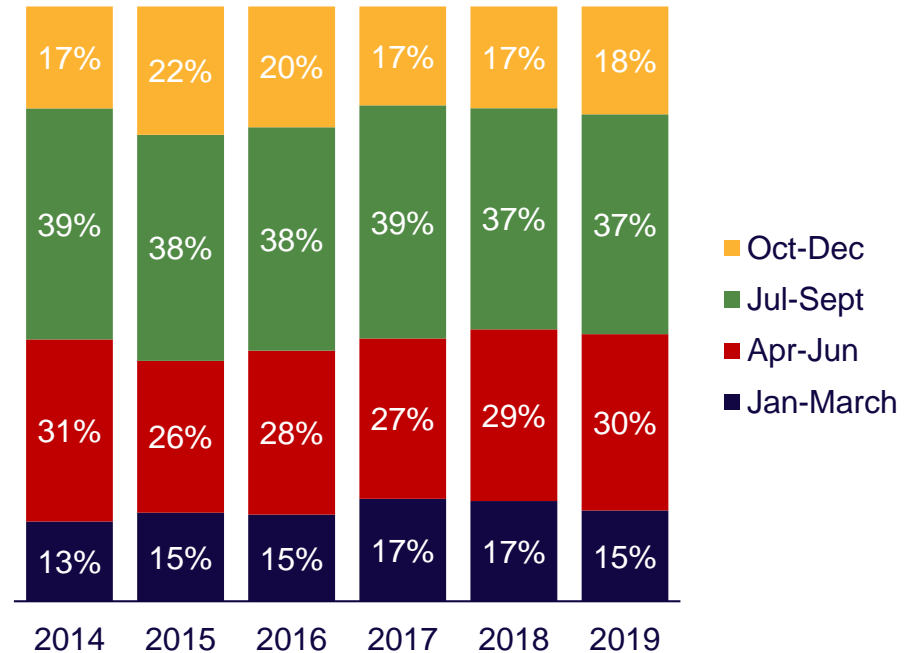


# Seasonality

Percentage of visits: pre-revision



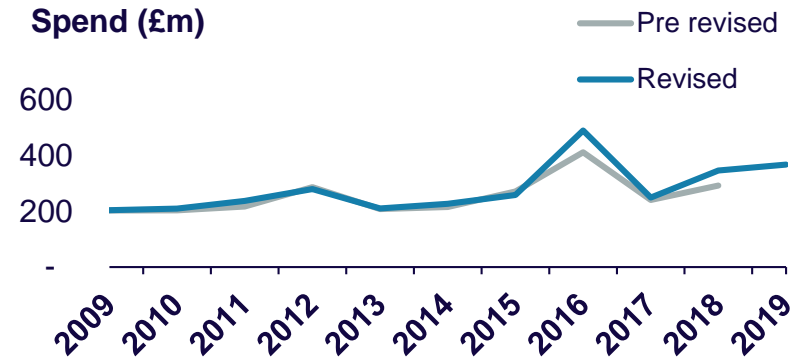
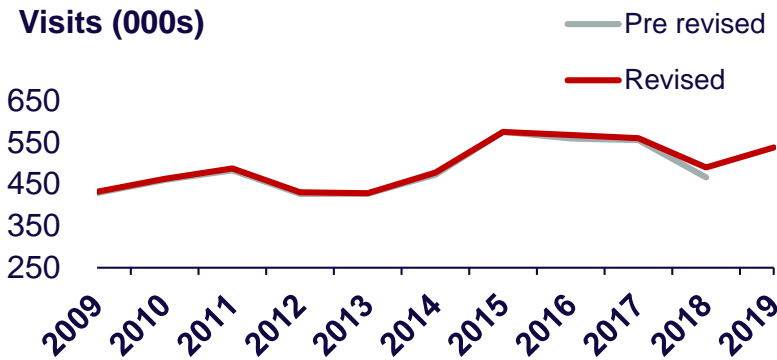
Percentage of visits: revised



Changes in seasonality of inbound visits are slight when comparing pre-revised and revised data for Wales. Share of quarter one has slightly increased in 2015, 2016 and 2018, quarter two gains in 2014, quarter 3 gains in 2017 and quarter four gains in 2018.



# Inbound trend & top source markets



## Top source markets\*

Ranking	Visits	Spend
<b>Pre-revised (2009-2018)</b>	Irish Republic, Germany, France, USA, Netherlands, Spain, Australia, Poland, Canada, Norway	Australia, USA, Irish Republic, UAE, Germany, Spain, China, Canada, France, Netherlands
<b>Revised (2009-2018)</b>	Irish Republic, Germany, USA, France, Netherlands, Spain, Australia, Poland, Canada, Italy	China, USA, Australia, Irish Republic, Germany, Spain, UAE, Canada, France, Netherlands

Revisions have been small when comparing revised and pre-revised data, with an average gain of 6,000 visits per year from 2009-2018, and £16 million in the same period, with some larger revisions recently. When examining the revised top source markets from 2009-2018, USA gained a place for visits, and Italy has supplanted Norway in 10<sup>th</sup> place. Some larger changes are seen in ranking for spend, including China gaining six places to be ranked first.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' data.



## Inbound volume & value

Year	Pre-revised visits (000s)	Pre-revised visit share	Revised visits (000s)	Revised visit share	Pre-revised spend (£m)	Pre-revised spend share	Revised spend (£m)	Revised spend share
2009	429	1%	432	1%	203	1%	204	1%
2010	460	2%	463	2%	204	1%	210	1%
2011	483	2%	488	2%	218	1%	237	1%
2012	427	1%	431	1%	287	2%	281	1%
2013	427	1%	428	1%	208	1%	211	1%
2014	473	1%	478	1%	216	1%	228	1%
2015	576	2%	575	2%	272	1%	259	1%
2016	560	1%	568	1%	413	2%	491	2%
2017	556	1%	561	1%	241	1%	250	1%
2018	466	1%	490	1%	293	1%	347	1%
2019	N/A	N/A	538	1%	N/A	N/A	369	1%

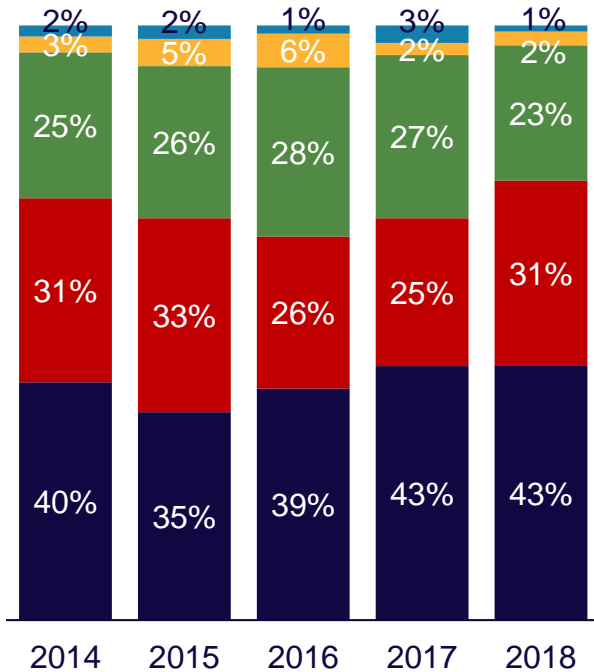
Across 2009-2018, there have mostly been gains in both visits and spend per year when comparing pre-revised and revised data for the North East. The exceptions are 2015, when estimates were lowered by 1,000 visits and £13 million spend, and 2012 with a lowering of £7 million spend. The most visits are gained in 2018, and the most spend is gained in 2016. Overall, percentage share in both measures remains similar when comparing the two sets of data.



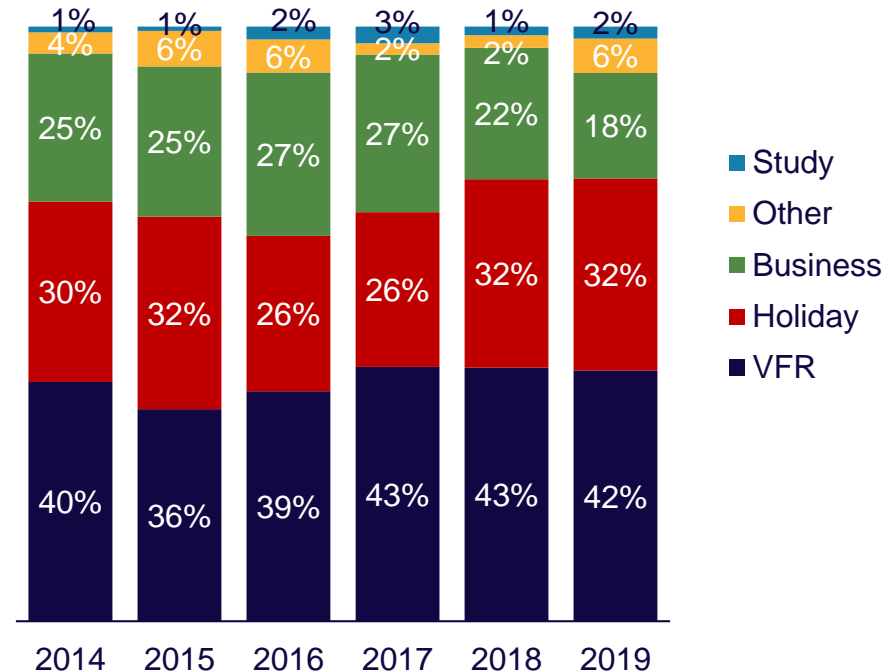


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised

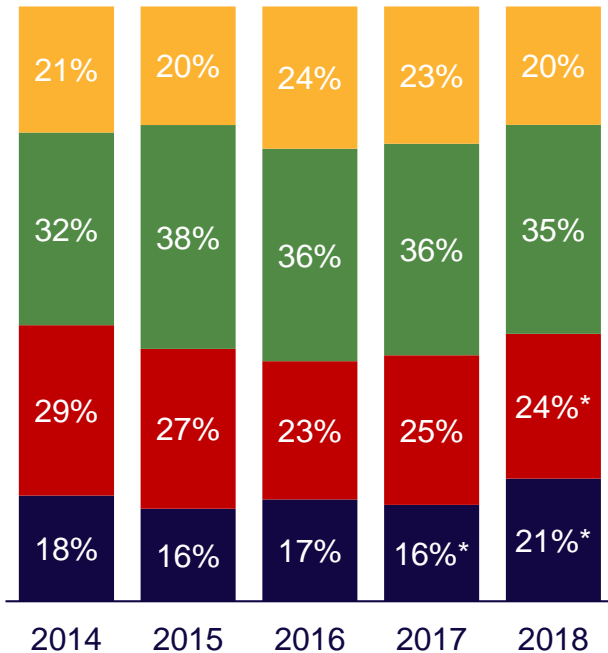


Share of visitors from different journey purposes has remained similar when comparing pre-revised and revised data for the North East from 2014-2018. However, the Study purpose lost 2 percentage points in 2015, to the benefit of the 'Other' and VFR groups. Study also marginally lost share in 2014. Also, in 2016, 2017 and 2018, the Holiday purpose gained 1 percentage point, to the detriment of the Business purpose.

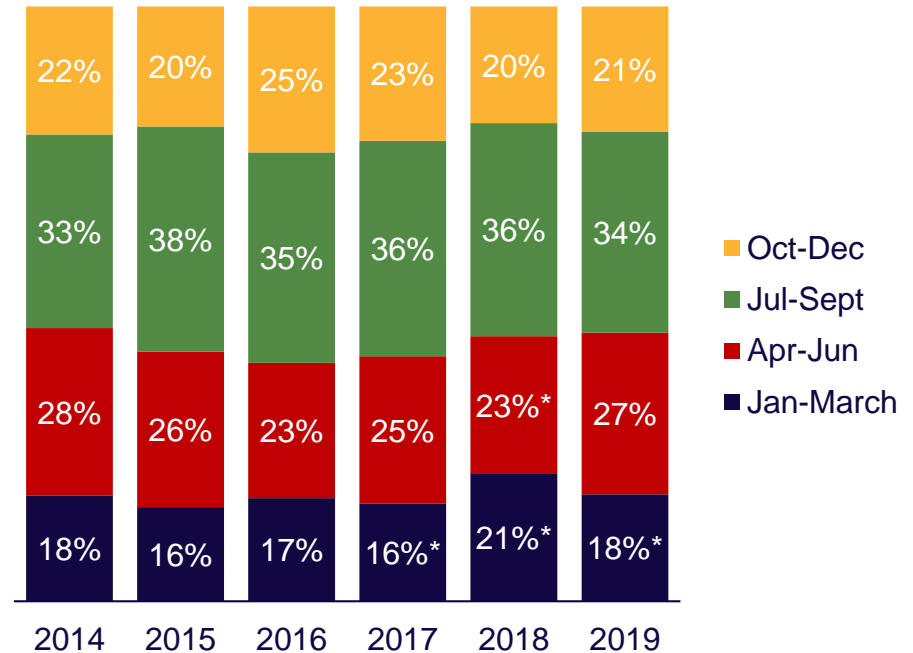


# Seasonality

Percentage of visits: pre-revision



Percentage of visits: revised

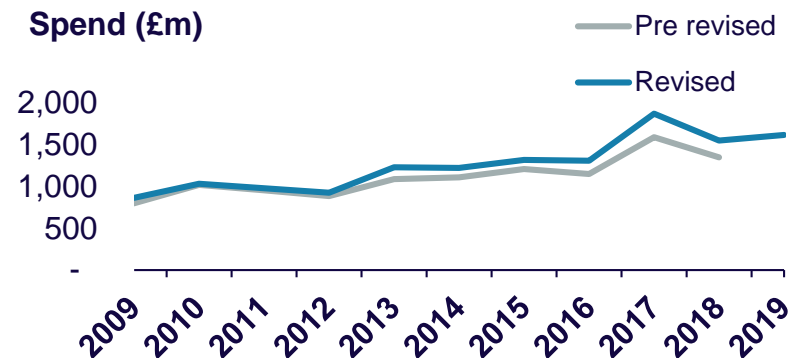
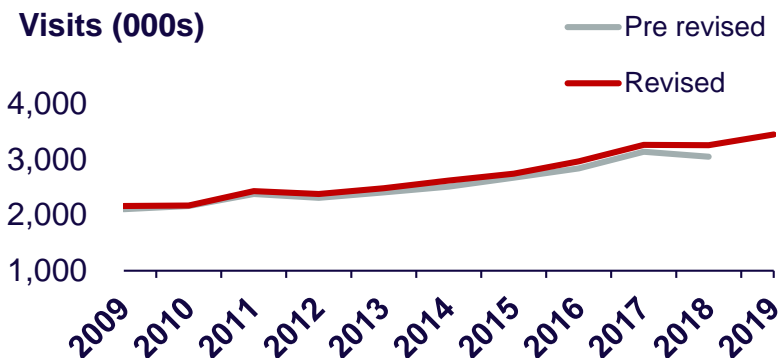


- Oct-Dec
- Jul-Sept
- Apr-Jun
- Jan-March

Changes in seasonality of inbound visits are slight when comparing pre-revised and revised data for the North East. Quarter three gained some share in 2017 and 2018. Quarter one also gained 1 percentage point in 2018, and quarter four gained 1 percentage point in 2016.



# Inbound trend & top source markets



## Top source markets\*

Ranking	Visits	Spend
<b>Pre-revised (2009-2018)</b>	Irish Republic, Germany, USA, Spain, France, Poland, Netherlands, Australia, Norway, Italy	USA, Irish Republic, Germany, Australia, Spain, France, China, Norway, Netherlands, Poland
<b>Revised (2009-2018)</b>	Irish Republic, Germany, USA, Spain, France, Poland, Netherlands, Australia, Norway, Italy	China, USA, Irish Republic, Germany, Spain, Australia, France, Norway, Netherlands, Saudi Arabia

Throughout 2009-2018, a positive trend is seen when comparing revised and pre-revised data for the North West, with an average gain of 90,000 visits, and £115 million per year.

When examining the revised top source markets from 2009-2018, there are no changes in ranking for visits, however China has gained six places to be ranked first for spend, and Saudi Arabia is a new entrant in this top ten.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' data.

## Inbound volume & value

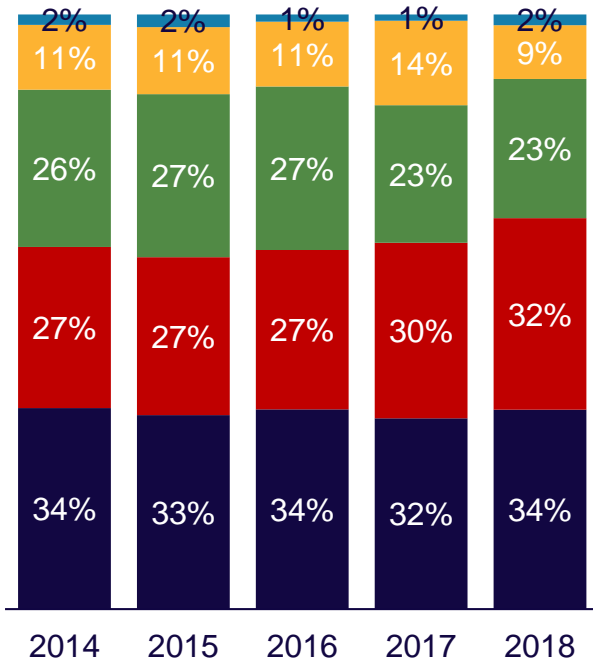
Year	Pre-revised visits (000s)	Pre-revised visit share	Revised visits (000s)	Revised visit share	Pre-revised spend (£m)	Pre-revised spend share	Revised spend (£m)	Revised spend share
2009	2,106	7%	2,165	7%	801	5%	865	5%
2010	2,165	7%	2,173	7%	1,021	6%	1,035	6%
2011	2,380	8%	2,431	8%	956	5%	980	5%
2012	2,311	7%	2,378	7%	887	5%	927	5%
2013	2,408	7%	2,482	7%	1,090	5%	1,233	6%
2014	2,512	7%	2,620	7%	1,112	5%	1,224	5%
2015	2,674	7%	2,746	7%	1,211	5%	1,320	6%
2016	2,839	8%	2,967	8%	1,151	5%	1,310	5%
2017	3,138	8%	3,264	8%	1,593	7%	1,875	7%
2018	3,051	8%	3,256	8%	1,351	6%	1,553	6%
2019	N/A	N/A	3,449	8%	N/A	N/A	1,620	6%

When comparing pre-revised and revised data for the North West, gains can be seen across both visits and spend for every year from 2009-2018. The most gains can be seen in later years, with 205,000 visits gained in 2018, and £281 million gained in 2017. Share in visits and spend within the UK has remained similar throughout 2009-2018.

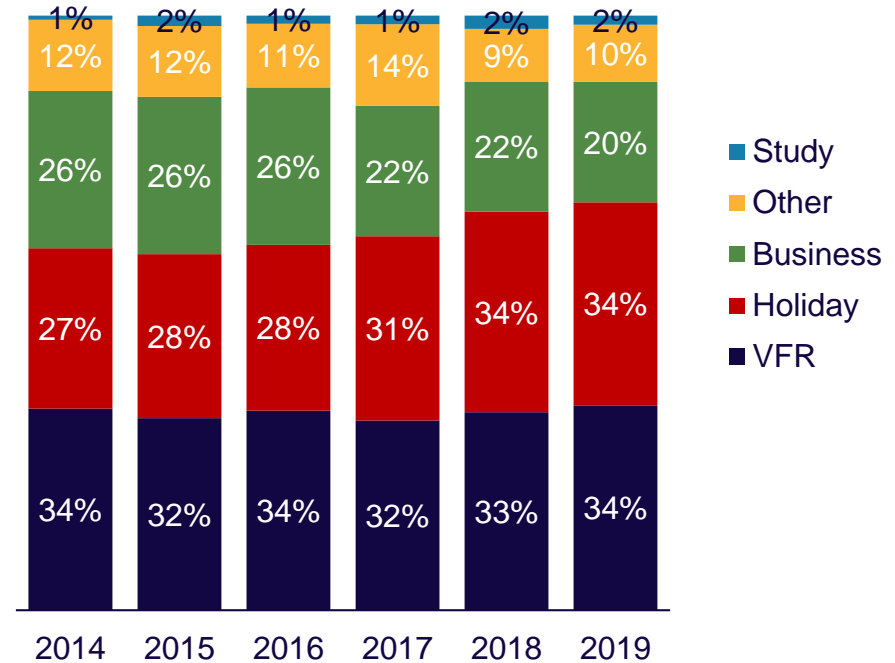


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised

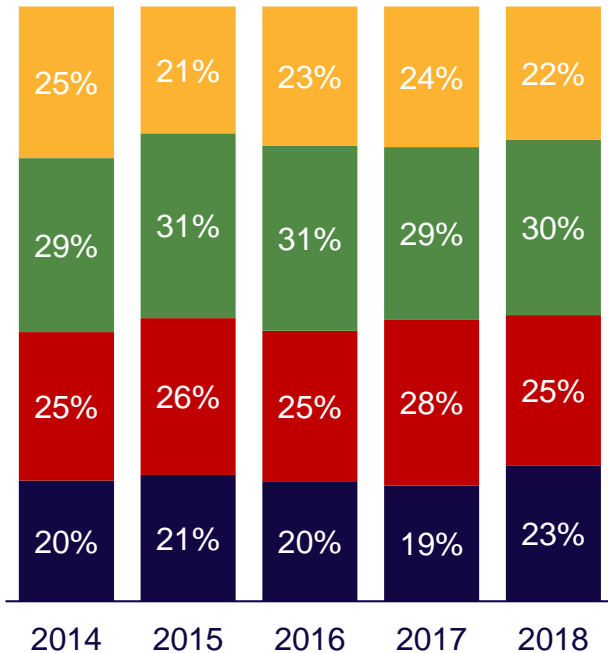


When comparing pre-revised and revised data for the North West, we can see that the Holiday purpose has gained some share in the years from 2015 to 2018.

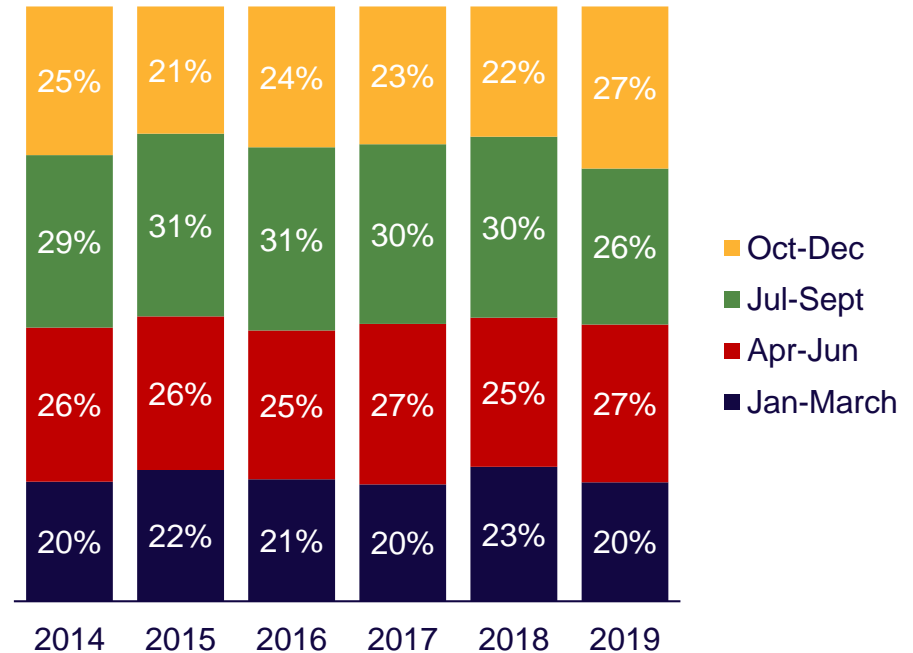


# Seasonality

Percentage of visits: pre-revision



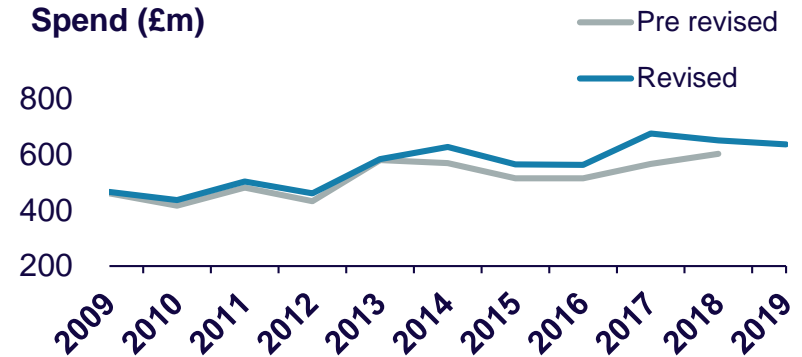
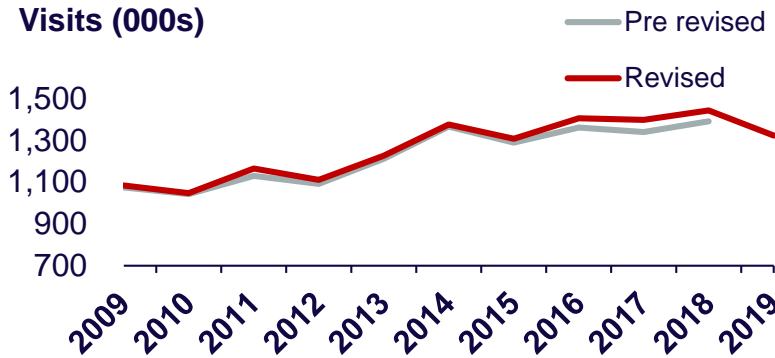
Percentage of visits: revised



Changes in seasonality of inbound visits are slight when comparing pre-revised and revised data for the North West. Quarter three gained 1 percentage point in both 2017 and 2018, quarter one gained 1 percentage point in 2015, and quarter two gained 1 percentage point in 2014.



# Inbound trend & top source markets



## Top source markets\*

Ranking	Visits	Spend
<b>Pre-revised (2009-2018)</b>	USA, Germany, Poland, France, Spain, Irish Republic, Australia, Netherlands, Romania, Canada	USA, Australia, Spain, Germany, France, Irish Republic, Poland, China, Netherlands, Canada
<b>Revised (2009-2018)</b>	USA, Germany, Poland, France, Irish Republic, Spain, Australia, Netherlands, Italy, Canada, China	USA, China, Australia, Spain, Germany, France, Irish Republic, Poland, Netherlands, Italy

Throughout 2009-2018, a positive trend is seen when comparing revised and pre-revised data for Yorkshire, with an average gain of 27,000 visits, and £39 million per year.

When examining the revised top source markets from 2009-2018, Romania has dropped out of the top ten to be replaced by Italy for visits. China has gained six places for spend, and Italy is a new entrant in the top ten.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' data.



## Inbound volume & value

Year	Pre-revised visits (000s)	Pre-revised visit share	Revised visits (000s)	Revised visit share	Pre-revised spend (£m)	Pre-revised spend share	Revised spend (£m)	Revised spend share
2009	1,076	4%	1,085	3%	461	3%	467	3%
2010	1,043	4%	1,048	3%	417	2%	437	2%
2011	1,131	4%	1,166	4%	482	3%	504	3%
2012	1,092	4%	1,112	3%	433	2%	461	2%
2013	1,213	4%	1,228	4%	581	3%	585	3%
2014	1,367	4%	1,377	4%	570	3%	628	3%
2015	1,290	4%	1,309	4%	516	2%	566	2%
2016	1,362	4%	1,407	4%	516	2%	564	2%
2017	1,341	3%	1,400	3%	567	2%	677	2%
2018	1,392	4%	1,445	4%	604	3%	652	2%
2019	N/A	N/A	1,324	3%	N/A	N/A	637	2%

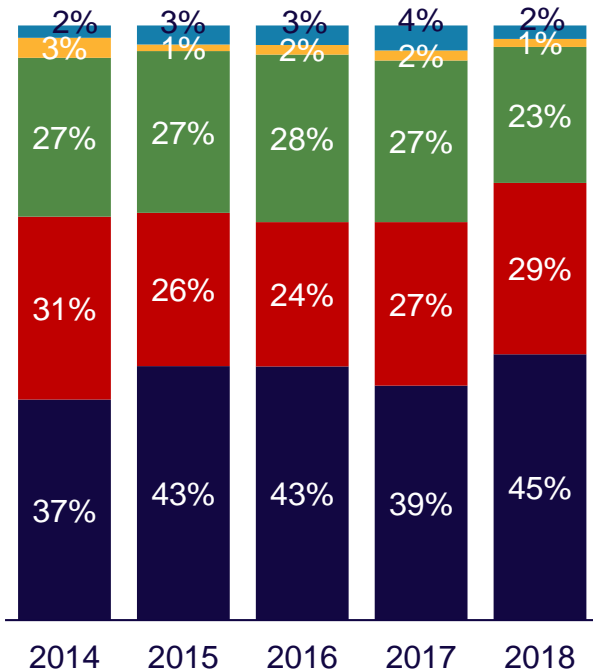
When comparing pre-revised and revised data for Yorkshire, gains can be seen across both visits and spend for every year from 2009-2018. The most gains can be seen in later years, with 59,000 visits gained in 2017, and £109 million gained in 2017. Share in visits and spend within the UK has remained similar throughout 2009-2018.



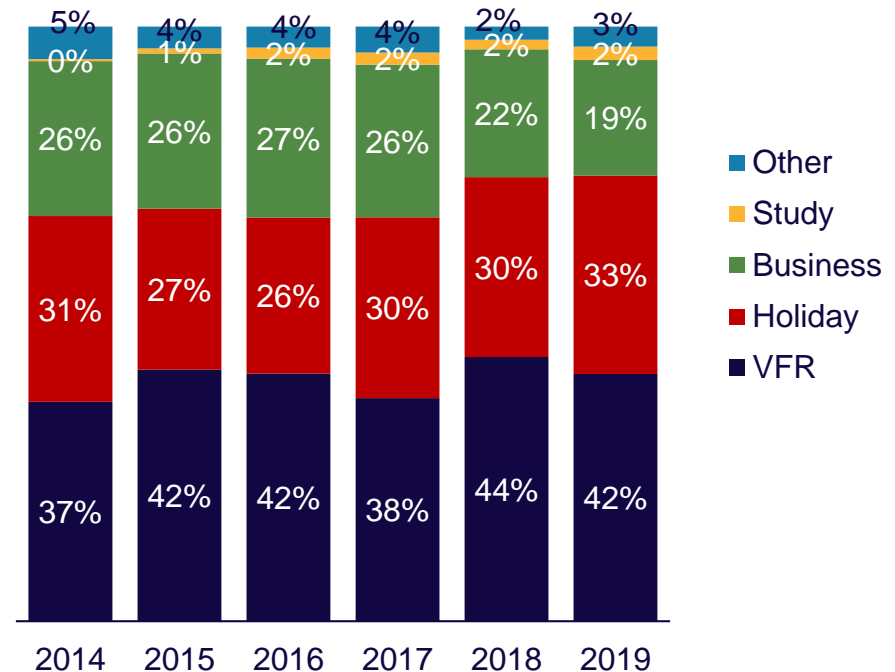


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised



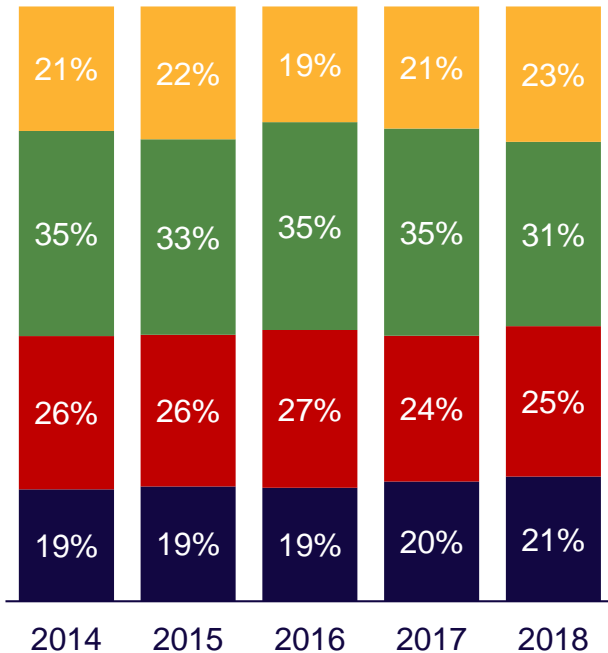
- Other
- Study
- Business
- Holiday
- VFR

There have been noticeable changes in share of journey purpose when comparing pre-revised and revised data for Yorkshire. The Study purpose lost significant share in 2014, and 'Other' gained in kind. The Holiday purpose also gained share in the years from 2015 onwards. 'Business' has lost some share from 2014 to 2018, and VFR also lost share in 2016 and 2017.

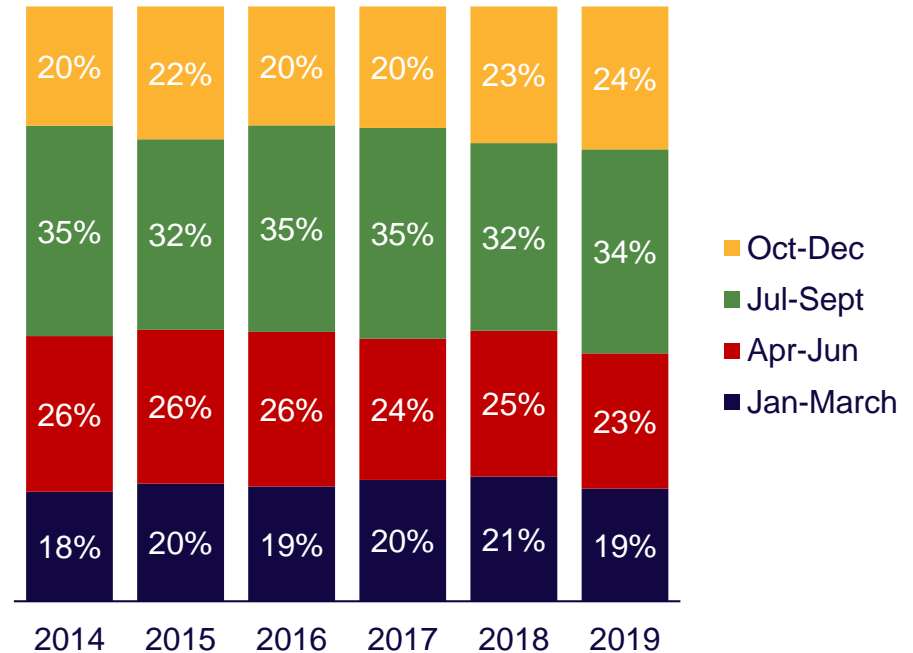


# Seasonality

Percentage of visits: pre-revision



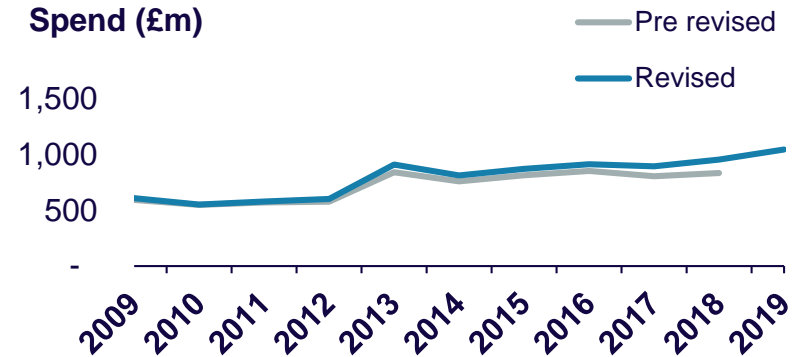
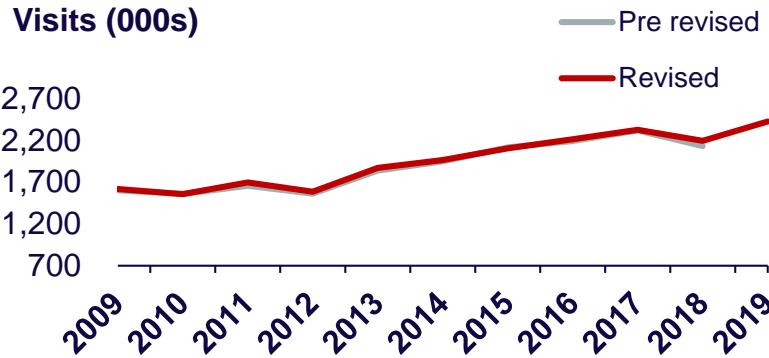
Percentage of visits: revised



Changes in seasonality of inbound visits are slight when comparing pre-revised and revised data for Yorkshire. Share of quarter three increased by 1 percentage point in 2014, 2017 and 2018. Quarter four gained 1 percentage point in 2016, and quarter one gained 1 percentage point in 2015.



# Inbound trend & top source markets



## Top source markets\*

Ranking	Visits	Spend
<b>Pre-revised (2009-2018)</b>	Irish Republic, Germany, Poland, France, USA, Spain, Netherlands, Romania, Australia, Italy	Irish Republic, USA, Germany, France, Australia, Spain, Netherlands, India, China, Italy
<b>Revised (2009-2018)</b>	Irish Republic, Germany, Poland, France, USA, Spain, Netherlands, Romania, Australia, Italy	Irish Republic, USA, Germany, China, France, Australia, Spain, India, Netherlands, Italy

In general, a positive trend is seen when comparing revised and pre-revised data for the West Midlands, with an average gain of 21,000 visits per year from 2009-2018, and £51 million in the same period.

When examining the revised top source markets from 2009-2018, there are no changes in the top rankings for visits, but China has gained five ranks for spend, and Spain has lost one rank by the same measure.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' data.



## Inbound volume & value

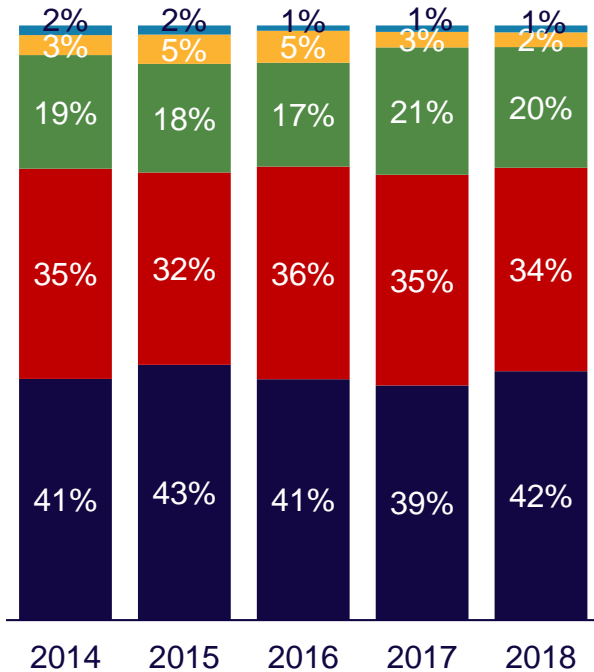
Year	Pre-revised visits (000s)	Pre-revised visit share	Revised visits (000s)	Revised visit share	Pre-revised spend (£m)	Pre-revised spend share	Revised spend (£m)	Revised spend share
2009	1,603	5%	1,620	5%	595	4%	610	3%
2010	1,561	5%	1,559	5%	549	3%	553	3%
2011	1,659	5%	1,699	5%	571	3%	581	3%
2012	1,563	5%	1,588	5%	578	3%	602	3%
2013	1,841	6%	1,874	6%	843	4%	913	4%
2014	1,952	6%	1,967	6%	761	3%	815	3%
2015	2,118	6%	2,107	6%	816	4%	874	4%
2016	2,196	6%	2,216	6%	855	4%	916	4%
2017	2,322	6%	2,330	6%	807	3%	897	3%
2018	2,134	6%	2,196	5%	836	4%	957	4%
2019	N/A	N/A	2,430	6%	N/A	N/A	1,048	4%

Across 2009-2018, there have mostly been gains in both visits and spend per year when comparing pre-revised and revised data for the West Midlands. The exceptions are 2015, when estimates were lowered by 11,000 visits, and 2010 with a lowering of 2,000 visits. The most visits and spend are gained in 2018: a gain of 62,000 and £121 million respectively. Overall, percentage share in both measures remains similar when comparing the two sets of data.

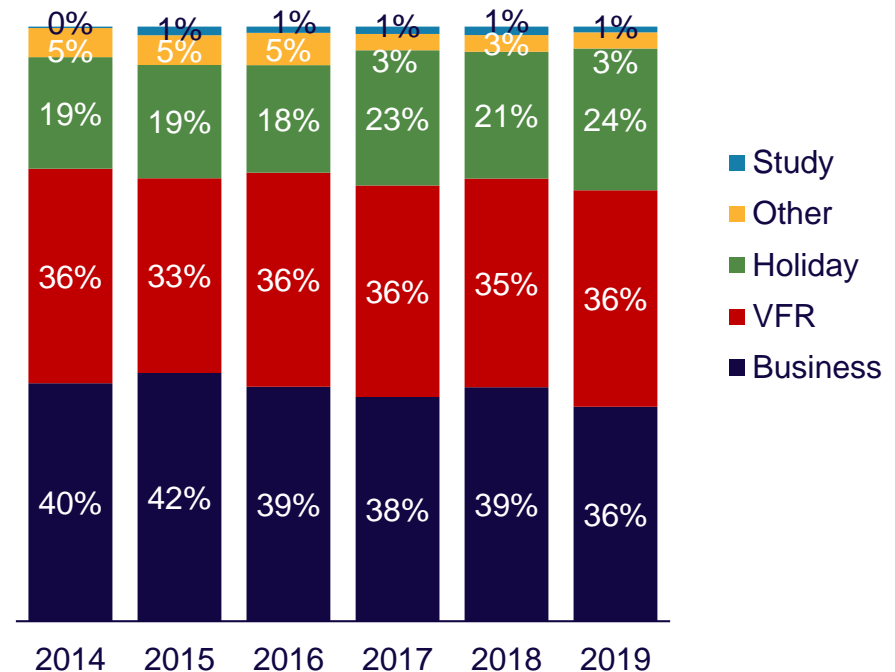


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised

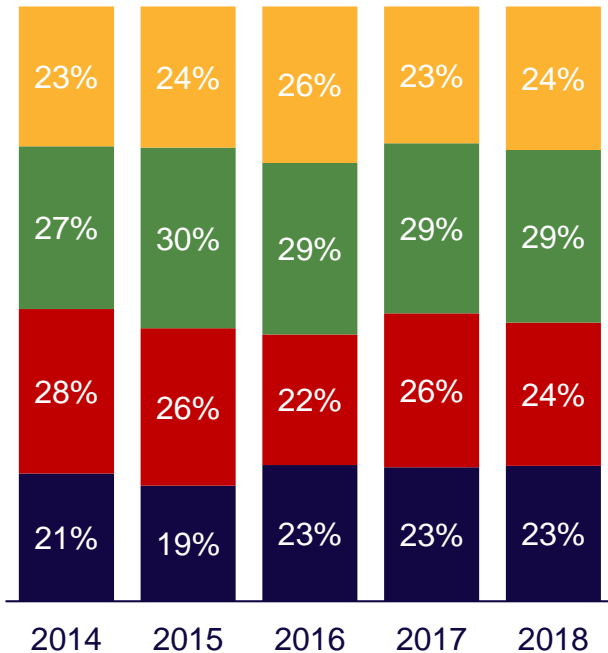


When comparing pre-revised and revised data for West Midlands, we can see that the Business purpose has consistently lost share each year from 2014 to 2018, and Study lost 1 percentage point of share in 2014. In contrast, 'Other' gained 2 percentage points in 2014, VFR gained 1 percentage point in 2014 and 2018, and Holiday gained 1 percentage point each year from 2015-2018.

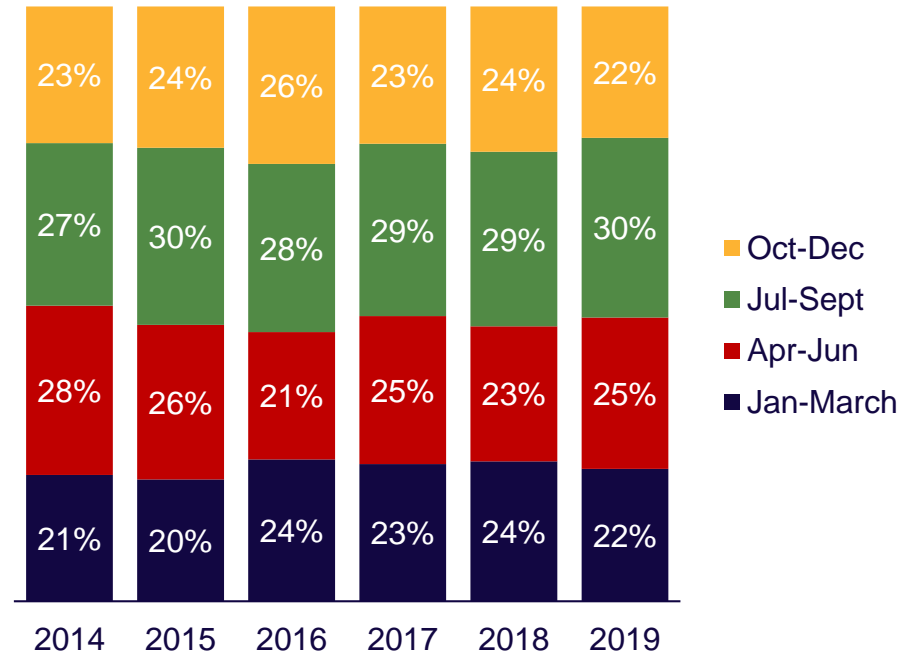


# Seasonality

Percentage of visits: pre-revision



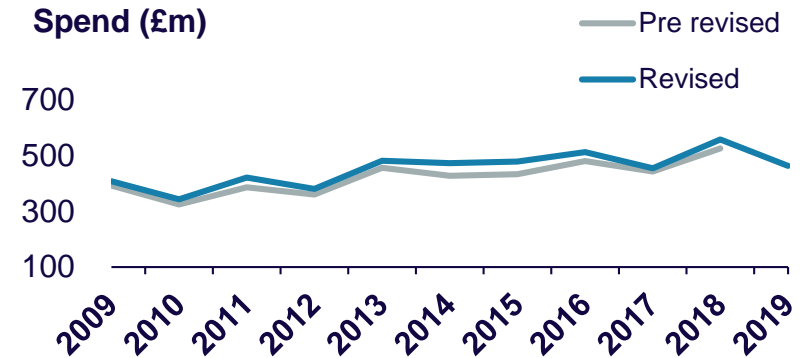
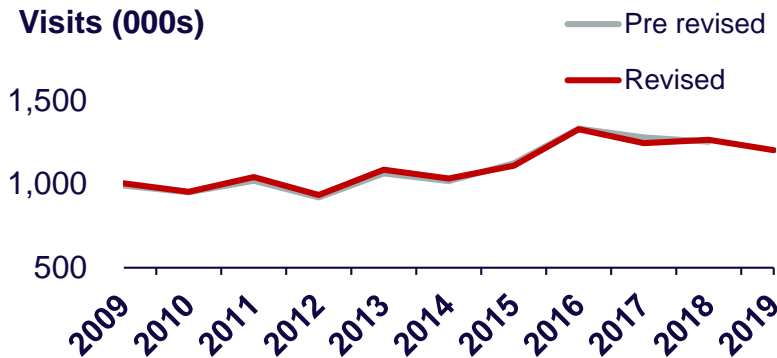
Percentage of visits: revised



Changes in seasonality of inbound visits are slight when comparing pre-revised and revised data for the West Midlands. Quarter one consistently gains some share from 2015 to 2018, whereas quarter two gains 1 percentage point in 2014.



# Inbound trend & top source markets



## Top source markets\*

Ranking	Visits	Spend
<b>Pre-revised (2009-2018)</b>	Poland, Irish Republic, Germany, France, Spain, USA, Netherlands, Australia, Romania, Italy	USA, Germany, France, Irish Republic, Australia, Spain, Poland, Netherlands, Italy, China
<b>Revised (2009-2018)</b>	Poland, Irish Republic, Germany, France, USA, Spain, Netherlands, Australia, Italy, Romania	USA, Germany, China, Irish Republic, France, Australia, Spain, Netherlands, Poland, Italy, India

For the East Midlands, revisions to visit numbers have generally been small with an average gain of 5,000 visits per year from 2009-2018, but with larger gains in spend averaging £28 million in the same period. When examining the revised top source markets from 2009-2018, the USA has gained one rank for visits, and Italy and Romania have switched places for ninth and tenth rank. For spend, the most significant change is a gain of seven ranks for China.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' data.



## Inbound volume & value

Year	Pre-revised visits (000s)	Pre-revised visit share	Revised visits (000s)	Revised visit share	Pre-revised spend (£m)	Pre-revised spend share	Revised spend (£m)	Revised spend share
2009	992	3%	1,006	3%	393	2%	409	2%
2010	952	3%	955	3%	325	2%	344	2%
2011	1,021	3%	1,043	3%	387	2%	422	2%
2012	922	3%	936	3%	361	2%	381	2%
2013	1,066	3%	1,087	3%	457	2%	482	2%
2014	1,019	3%	1,035	3%	428	2%	474	2%
2015	1,126	3%	1,112	3%	434	2%	479	2%
2016	1,334	4%	1,330	3%	481	2%	513	2%
2017	1,281	3%	1,247	3%	444	2%	455	2%
2018	1,255	3%	1,266	3%	527	2%	559	2%
2019	N/A	N/A	1,204	3%	N/A	N/A	464	2%

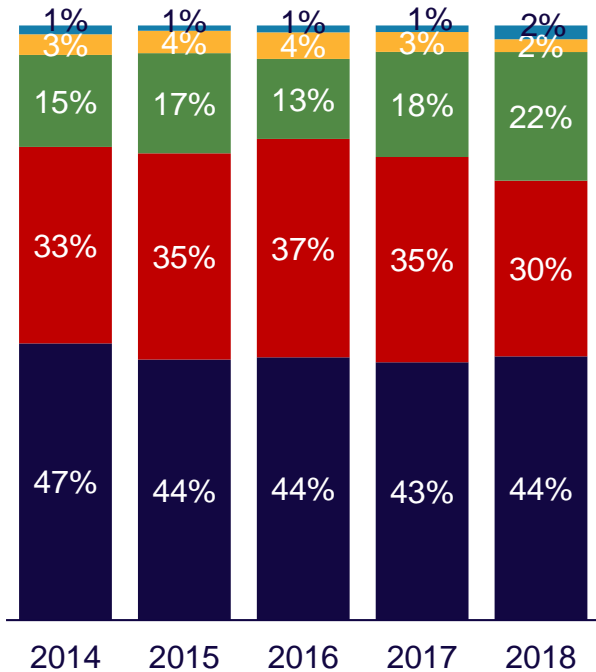
Across 2009-2018, there have mostly been gains in both visits and spend per year when comparing pre-revised and revised data for the East Midlands. The exceptions are 2017, when estimates were lowered by 34,000 visits, and 2015 with a lowering of 14,000 visits. The most visits are gained in 2011 and 2013, and the most spend is gained in 2014 and 2015. Overall, percentage share in visits and spend remains similar when comparing the two sets of data.



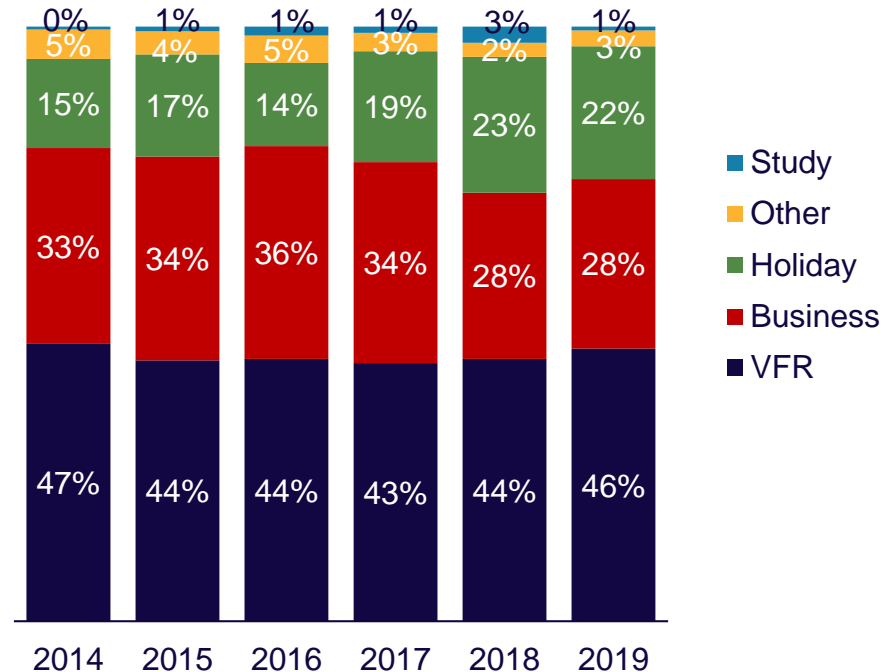


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised



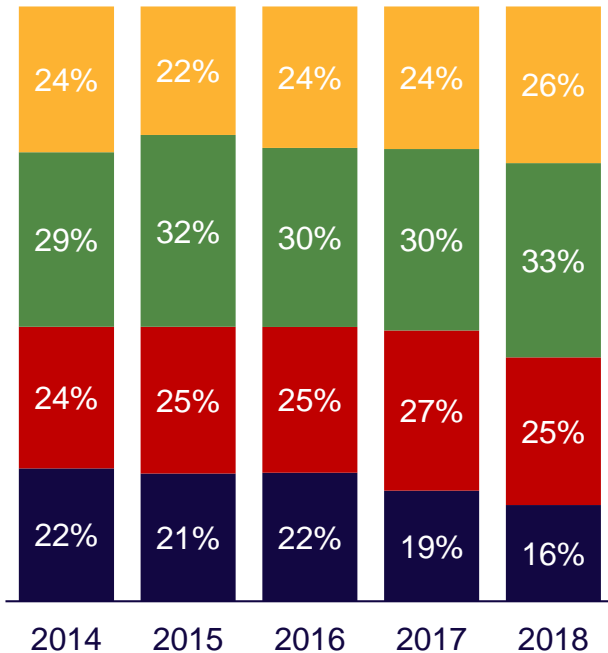
- Study
- Other
- Holiday
- Business
- VFR

When comparing pre-revised and revised data for the East Midlands, we can see that the Holiday purpose has gained some share from 2016 to 2018, and 'Other' gained 1 percentage point in 2014. In contrast, the Business purpose lost some share in 2016, 2017 and 2018, and Study lost in kind in 2014.

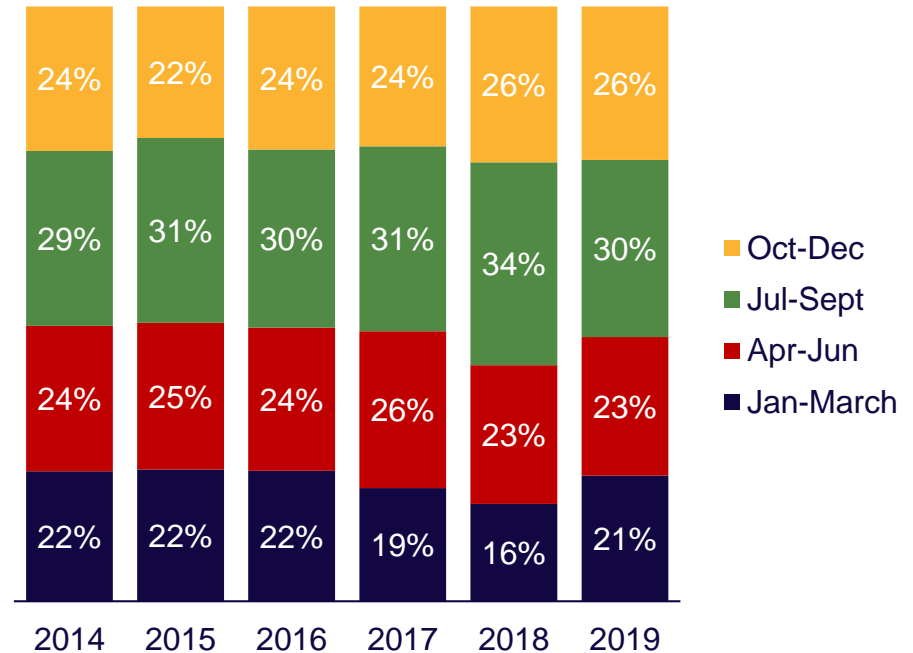


# Seasonality

Percentage of visits: pre-revision



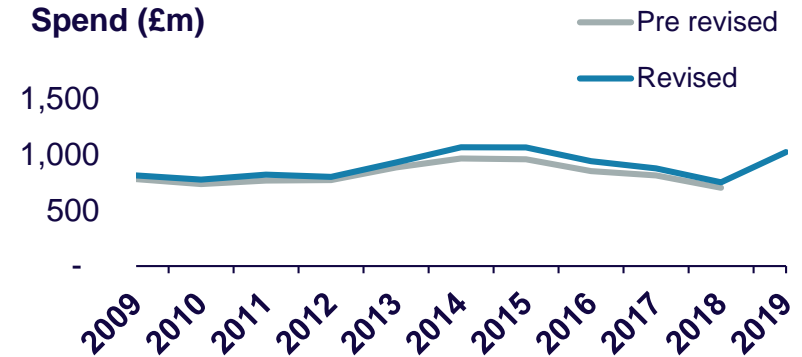
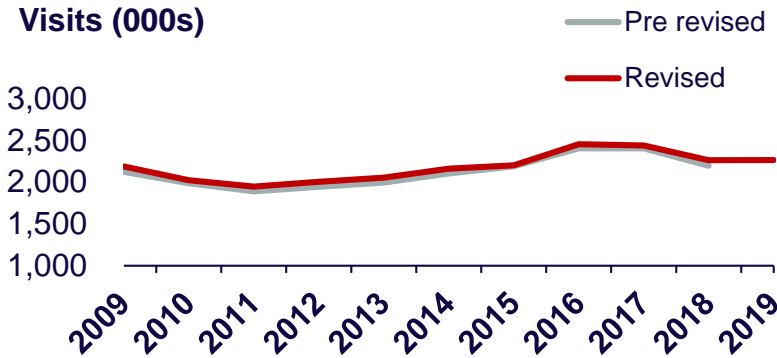
Percentage of visits: revised



Changes in seasonality of inbound visits are slight when comparing pre-revised and revised data for the East Midlands. Quarter three gains 1 percentage point in 2018 and 2017, quarters one and four gain 1 percentage point in 2015, and quarter two gains 1 percentage point in 2014.



# Inbound trend & top source markets



## Top source markets\*

Ranking	Visits	Spend
<b>Pre-revised (2009-2018)</b>	France, Germany, USA, Irish Republic, Netherlands, Poland, Spain, Italy, Australia, Romania	USA, France, Germany, Australia, Spain, Irish Republic, Netherlands, Italy, Poland, Canada
<b>Revised (2009-2018)</b>	France, Germany, USA, Irish Republic, Netherlands, Spain, Poland, Italy, Australia, Romania	USA, France, Germany, Australia, Spain, Irish Republic, Italy, Netherlands, China, Poland

Throughout 2009-2018, a positive trend is seen when comparing revised and pre-revised data for the East of England, with an average gain of 50,000 visits, and £61 million per year.

When examining the revised top source markets from 2009-2018, China is a new entry at rank nine, Italy has gained one rank, and Canada has dropped out of the top ten.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' data.



## Inbound volume & value

Year	Pre-revised visits (000s)	Pre-revised visit share	Revised visits (000s)	Revised visit share	Pre-revised spend (£m)	Pre-revised spend share	Revised spend (£m)	Revised spend share
2009	2,124	7%	2,191	7%	782	5%	814	5%
2010	1,989	7%	2,025	7%	737	4%	777	4%
2011	1,891	6%	1,948	6%	768	4%	822	4%
2012	1,946	6%	2,006	6%	773	4%	802	4%
2013	1,997	6%	2,055	6%	887	4%	931	4%
2014	2,106	6%	2,164	6%	967	4%	1,067	5%
2015	2,192	6%	2,204	6%	960	4%	1,066	4%
2016	2,406	6%	2,457	6%	854	4%	943	4%
2017	2,407	6%	2,441	6%	815	3%	877	3%
2018	2,199	6%	2,265	6%	704	3%	752	3%
2019	N/A	N/A	2,267	6%	N/A	N/A	1,025	4%

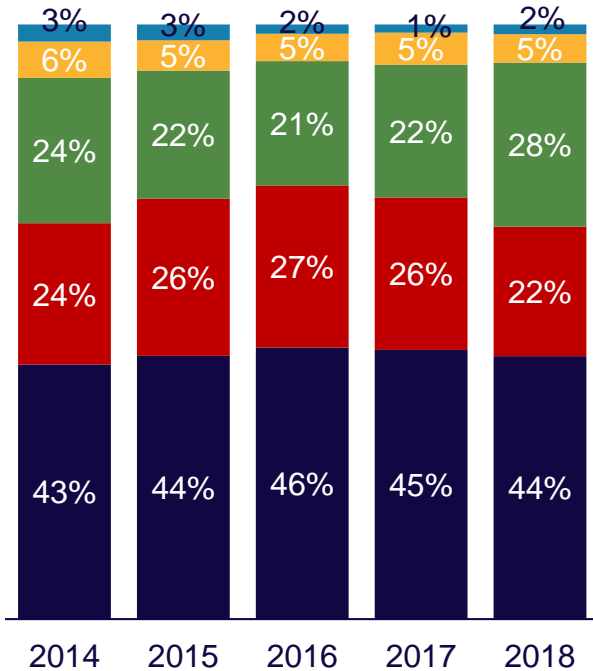
When comparing pre-revised and revised data for the East of England, gains can be seen across both visits and spend for every year from 2009-2018. The most gains in visits are seen in both 2009 and 2018, with 67,000 gained in each year.

In 2015, the most spend was gained, at £106 million. Share in visits and spend within the UK has remained similar throughout 2009-2018.

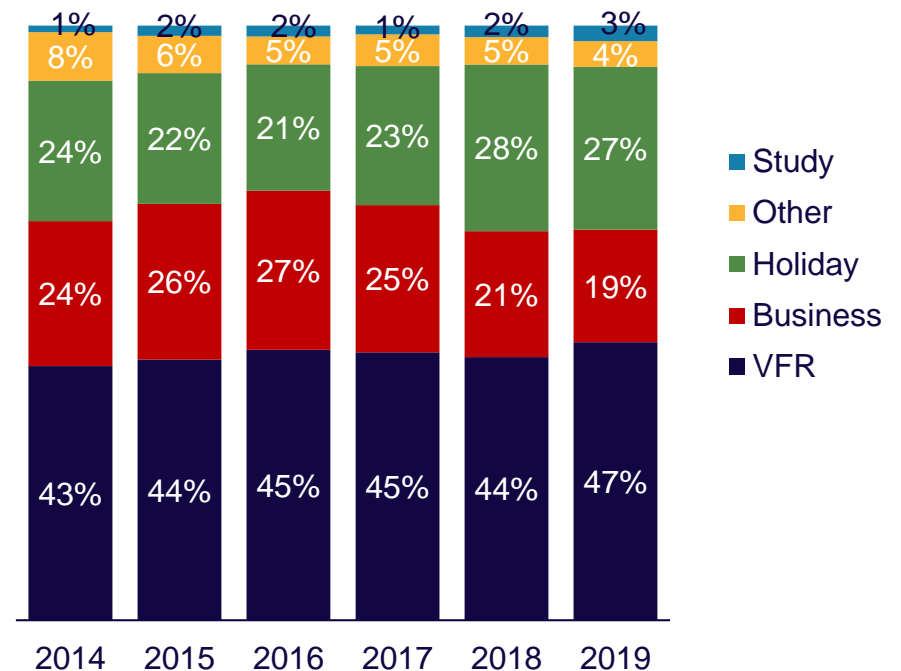


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised

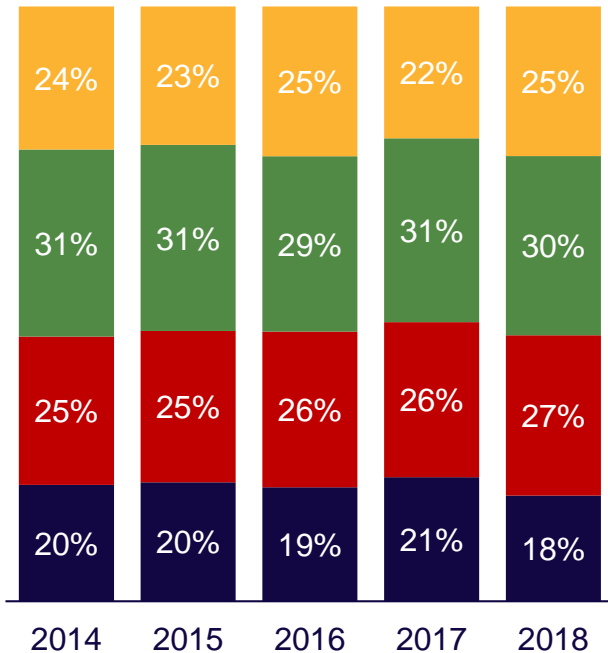


There have been some changes in share of journey purpose when comparing pre-revised and revised data for the East of England. In 2014, both Business and Other visits gained some share, while Study and Holiday lost some in kind. A similar pattern took place in 2015 between Other and Study, and in 2017 between Holiday and Business (respectively). Business also lost one percentage point in 2018.

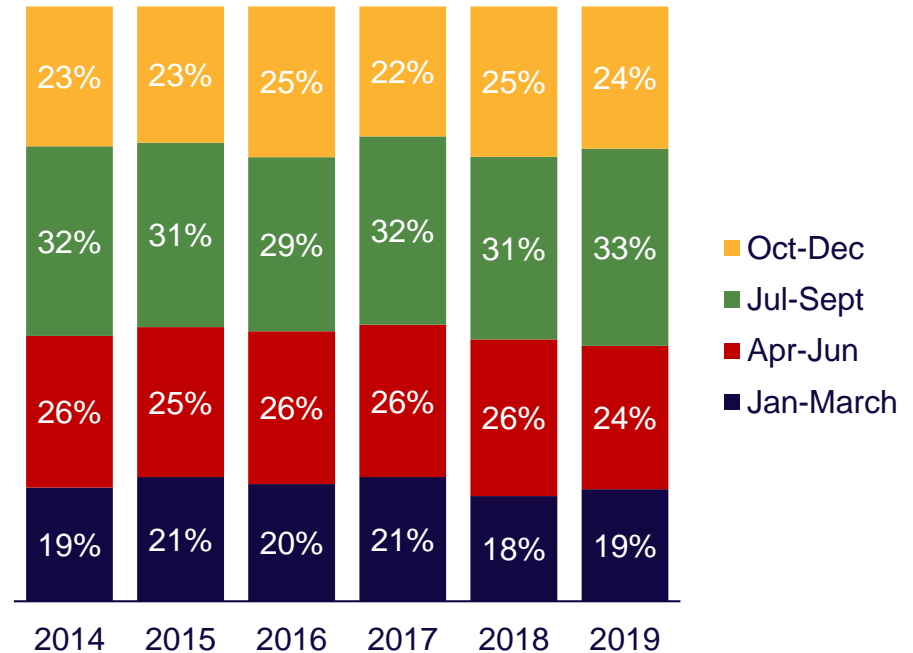


# Seasonality

Percentage of visits: pre-revision



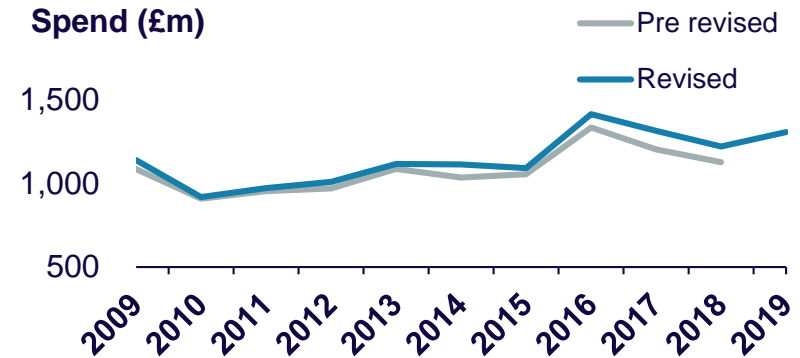
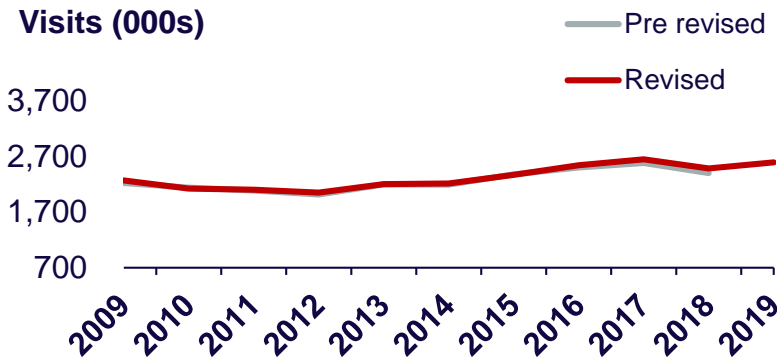
Percentage of visits: revised



Changes in seasonality of inbound visits are slight when comparing pre-revised and revised data for the East of England. Quarter three gained 1 percentage point in 2017 and 2018, whereas quarter one gained the same in 2015 and 2016, and quarter two gained the same in 2014.



# Inbound trend & top source markets



## Top source markets\*

Ranking	Visits	Spend
<b>Pre-revised (2009-2018)</b>	Germany, France, USA, Netherlands, Irish Republic, Spain, Australia, Poland, Italy, Switzerland	Germany, USA, France, Australia, Spain, Irish Republic, Netherlands, Switzerland, Italy, Canada
<b>Revised (2009-2018)</b>	Germany, France, USA, Spain, Irish Republic, Netherlands, Australia, Italy, Poland, Switzerland	Germany, USA, France, Australia, Spain, Irish Republic, Switzerland, Netherlands, Italy, China

In general, a positive trend is seen when comparing revised and pre-revised data for the South West, with an average gain of 29,000 visits per year from 2009-2018, and £55 million in the same period.

When examining the revised top source markets from 2009-2018, Spain has gained two ranks for visits, and Italy and Poland have switched places for eighth and ninth place. Switzerland has gained one place for spend, and China is a new entrant to be ranked tenth.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' data.



## Inbound volume & value

Year	Pre-revised visits (000s)	Pre-revised visit share	Revised visits (000s)	Revised visit share	Pre-revised spend (£m)	Pre-revised spend share	Revised spend (£m)	Revised spend share
2009	2,224	7%	2,270	7%	1,087	7%	1,141	6%
2010	2,138	7%	2,121	7%	910	5%	920	5%
2011	2,088	7%	2,103	7%	955	5%	973	5%
2012	2,017	6%	2,051	6%	971	5%	1,010	5%
2013	2,199	7%	2,202	7%	1,088	5%	1,118	5%
2014	2,194	6%	2,216	6%	1,036	5%	1,115	5%
2015	2,378	7%	2,369	6%	1,056	5%	1,092	5%
2016	2,501	7%	2,544	7%	1,337	6%	1,416	6%
2017	2,584	7%	2,649	6%	1,205	5%	1,316	5%
2018	2,401	6%	2,485	6%	1,129	5%	1,223	5%
2019	N/A	N/A	2,595	6%	N/A	N/A	1,308	5%

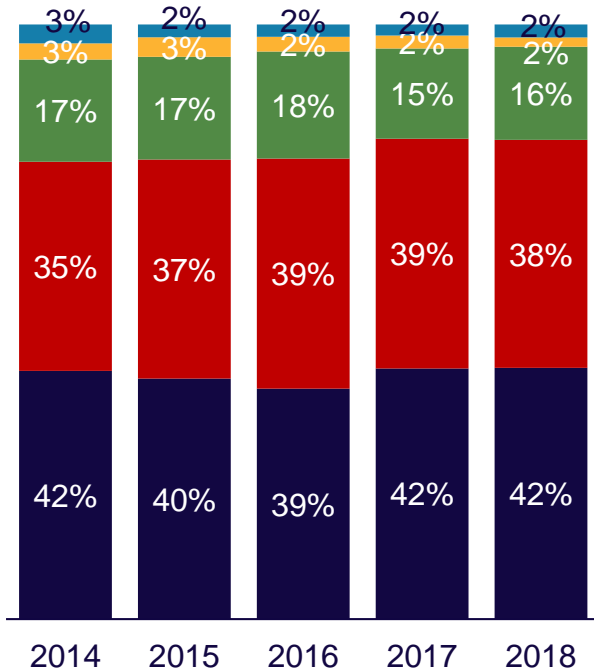
Across 2009-2018, there have mostly been gains in both visits and spend per year when comparing pre-revised and revised data for the South West. The exceptions are 2015, when estimates were lowered by 8,000 visits, and 2010 with a lowering of 17,000 visits. The most visits are gained in 2018, and the most spend is gained in 2017. Overall, percentage share in spend remains similar when comparing the two sets of data.



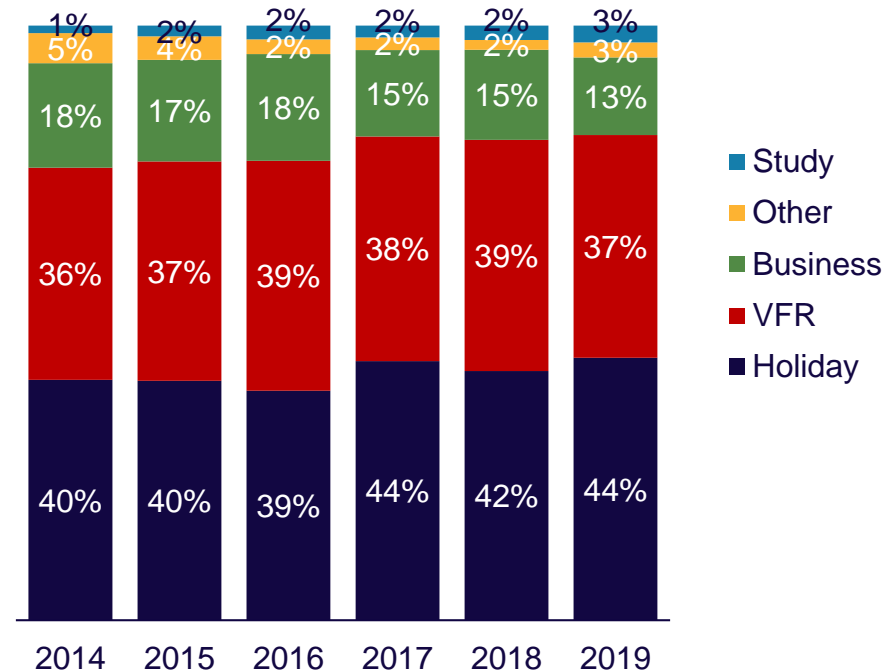


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised



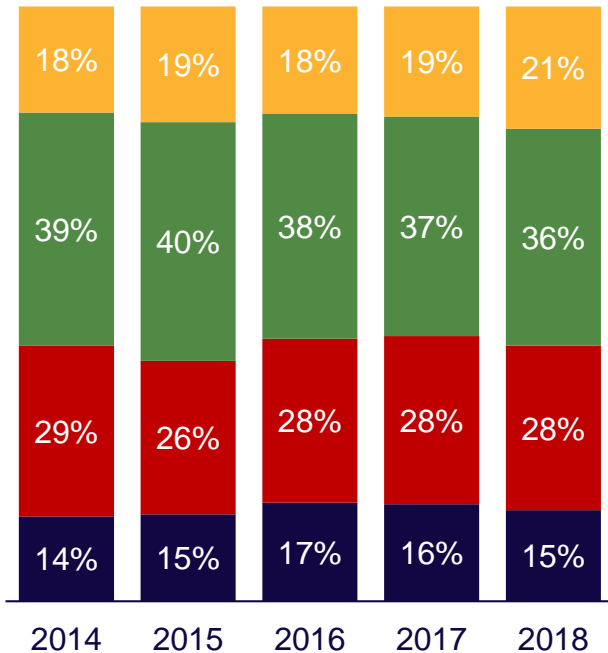
Changes in share of journey purpose in the South West have varied year by year when comparing pre-revised and revised data to some extent. 'Other' gained share in 2014 and 2015, but Study lost 2 percentage points in share in 2014. Holiday gained some share in 2017, and so did VFR in 2014 and 2018. Business consistently lost share in 2017 and 2018, and VFR lost share in 2017 and Holiday 2014.

Notes: 'VFR' means 'visiting friends and relatives'.

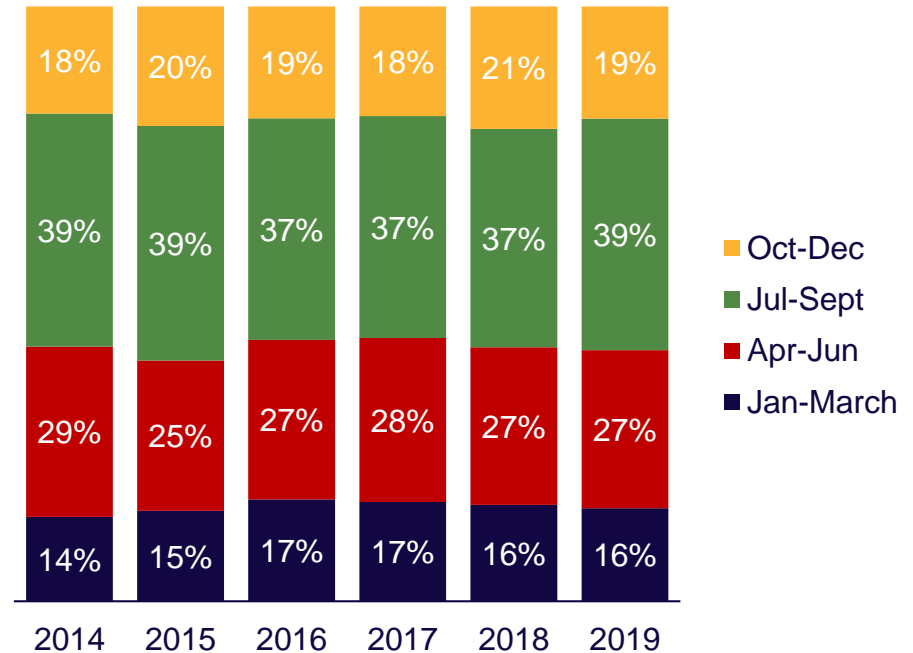


# Seasonality

Percentage of visits: pre-revision



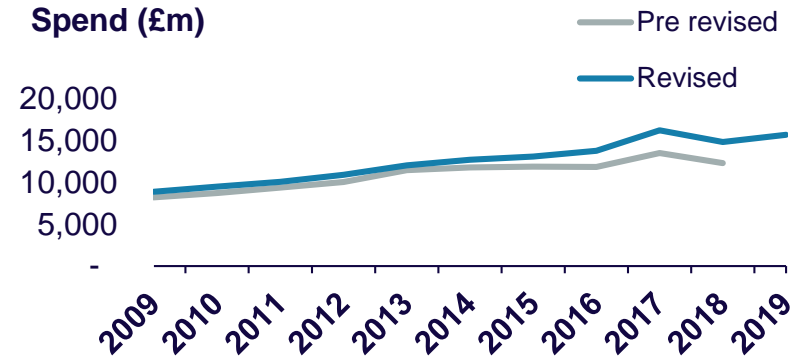
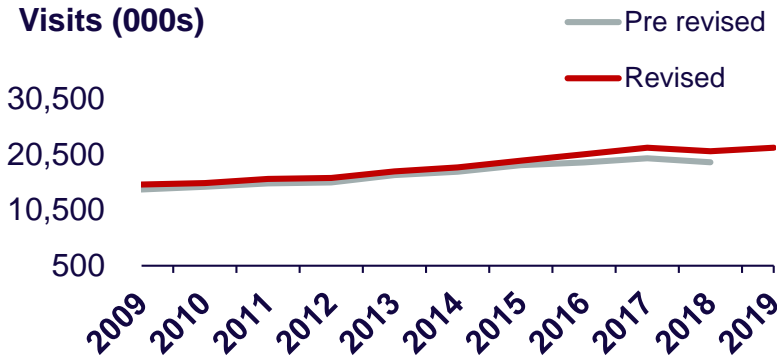
Percentage of visits: revised



Changes in seasonality of inbound visits are slight when comparing pre-revised and revised data for the South West. Quarter one gains 1 percentage point in 2018, 2016 and 2015. Quarter four also gains share in 2016 and 2015, to the detriment of the two middle quarters.



# Inbound trend & top source markets



## Top source markets\*

Ranking	Visits	Spend
<b>Pre-revised (2009-2018)</b>	USA, France, Germany, Italy, Spain, Netherlands, Irish Republic, Australia, Sweden, Belgium	USA, France, Germany, Italy, Australia, Spain, UAE, Switzerland, Netherlands, Saudi Arabia
<b>Revised (2009-2018)</b>	USA, France, Germany, Italy, Spain, Irish Republic, Netherlands, Australia, Belgium, Sweden	USA, France, Italy, Germany, Spain, Australia, China, UAE, Saudi Arabia, Kuwait

Throughout 2009-2018, a positive trend is seen when comparing revised and pre-revised data for London, with an average gain of 1.1 million visits, and £1.3 billion per year.

When examining the revised top source markets from 2009-2018, the Irish Republic and Belgium have gained one rank for visits. Italy and Spain have gained one rank for spend, and China, UAE, and Kuwait are new entrants in the top 10 for this measure.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' data.



## Inbound volume & value

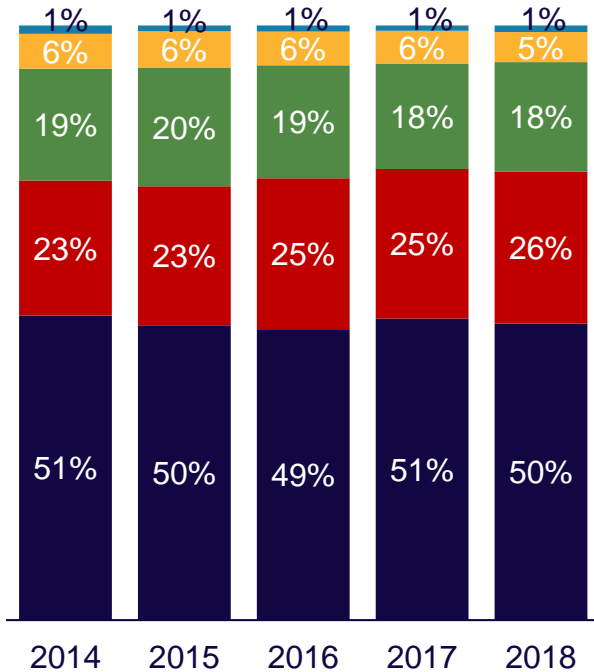
Year	Pre-revised visits (000s)	Pre-revised visit share	Revised visits (000s)	Revised visit share	Pre-revised spend (£m)	Pre-revised spend share	Revised spend (£m)	Revised spend share
2009	14,211	48%	15,092	49%	8,238	50%	8,909	51%
2010	14,706	49%	15,353	51%	8,741	52%	9,509	53%
2011	15,289	50%	16,103	51%	9,411	52%	10,089	53%
2012	15,461	50%	16,279	51%	10,075	54%	10,941	55%
2013	16,811	51%	17,474	52%	11,496	54%	12,074	54%
2014	17,404	51%	18,189	51%	11,825	54%	12,737	54%
2015	18,581	51%	19,385	53%	11,919	54%	13,131	54%
2016	19,060	51%	20,533	52%	11,869	53%	13,815	54%
2017	19,828	51%	21,708	53%	13,547	55%	16,267	57%
2018	19,090	50%	21,072	52%	12,329	54%	14,863	56%
2019	N/A	N/A	21,713	53%	N/A	N/A	15,725	55%

When comparing pre-revised and revised data for London, significant gains can be seen across both visits and spend for every year from 2009-2018, and particularly in later years. The most gains in visits are seen in 2018, with 2.0 million visits more, and the most gains in spend were seen in 2017, with gains of £2.7 billion. Gains in share of visits are seen in 2016, 2017, 2018. Gains in share of spend are seen in 2010, 2016, 2017 and 2018.

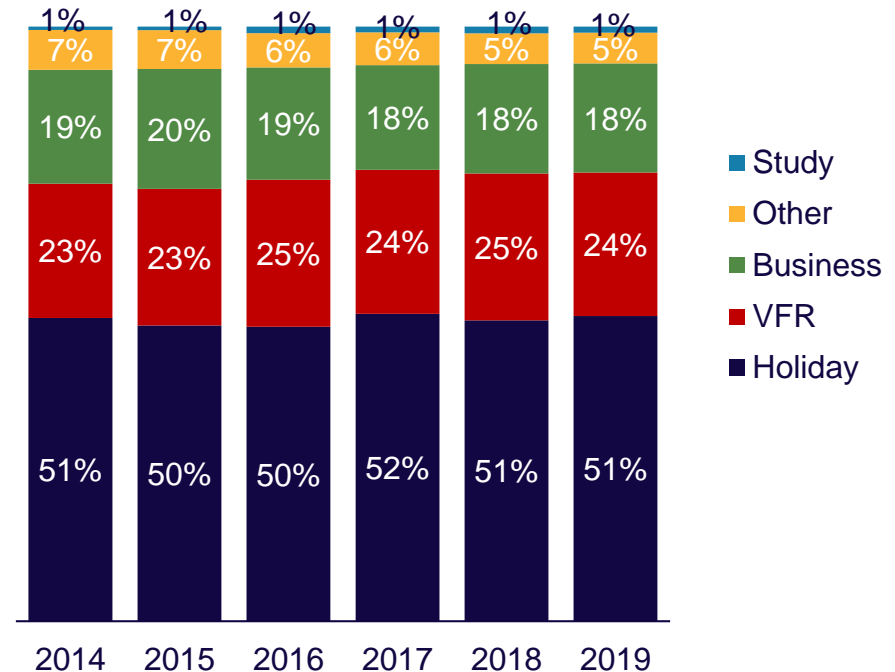


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised

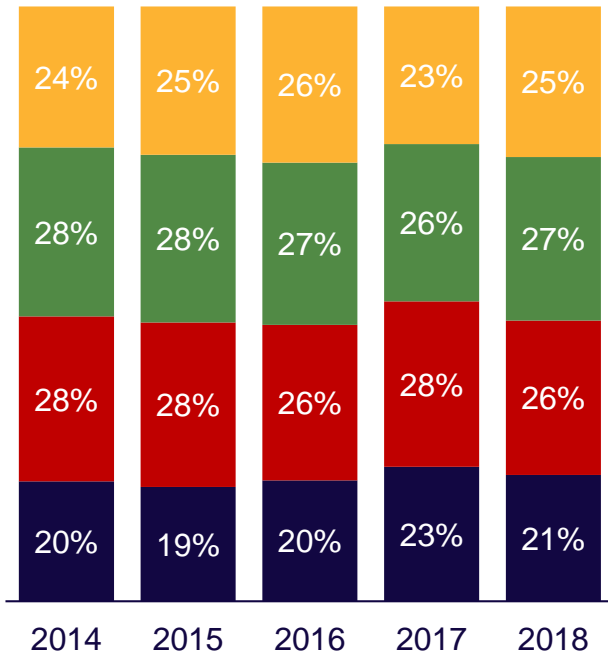


When comparing pre-revised and revised data for London, we can see that the Holiday purpose has gained share from 2016 to 2018, with VFR losing share in those years. Additionally, 'Other' gained 1 percentage point in 2014, and Study lost share in kind.

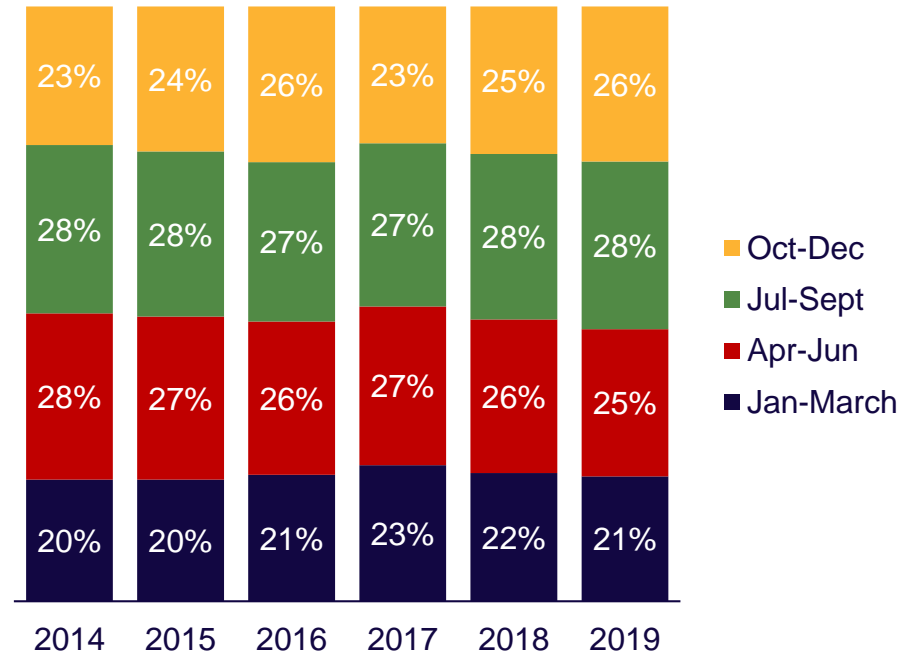


# Seasonality

Percentage of visits: pre-revision



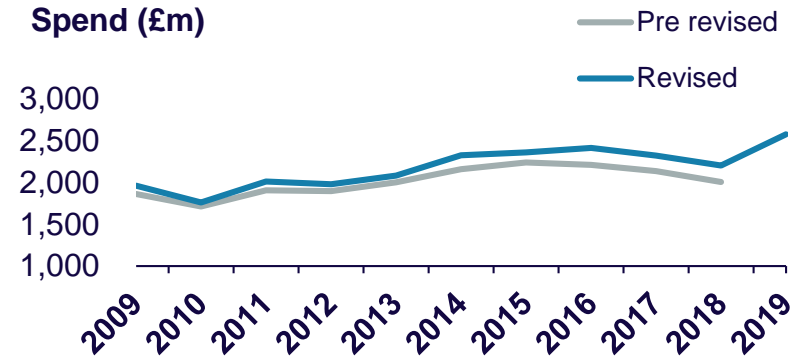
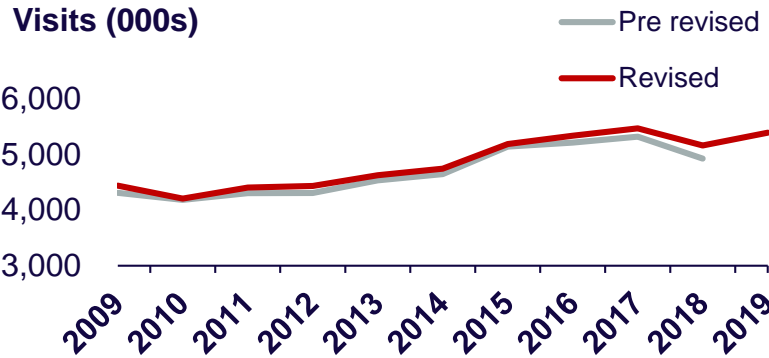
Percentage of visits: revised



Changes in seasonality of inbound visits are slight when comparing pre-revised and revised data for London. Quarter one gained 1 percentage point in both 2015 and 2016, whereas quarter three gained 1 percentage point in 2017.



# Inbound trend & top source markets



## Top source markets\*

Ranking	Visits	Spend
<b>Pre-revised (2009-2018)</b>	France, Germany, USA, Netherlands, Spain, Irish Republic, Poland, Australia, Belgium, Italy	USA, Germany, France, Australia, Spain, Netherlands, Irish Republic, Italy, Canada, Switzerland
<b>Revised (2009-2018)</b>	France, Germany, USA, Netherlands, Spain, Irish Republic, Italy, Poland, Australia, Belgium	USA, Germany, France, Australia, Spain, Italy, Netherlands, Irish Republic, China, India

Throughout 2009-2018, a positive trend is seen when comparing revised and pre-revised data for the South East, with an average gain of 112,000 visits, and £129 million per year.

When examining the revised top source markets from 2009-2018, Italy has gained three ranks for visits, and two ranks for spend. Also in spend, notably China and India are both new entrants in the top ten.

\*Ranking calculated on VisitBritain's standard 65 markets, excludes 'Other markets' data.



## Inbound volume & value

Year	Pre-revised visits (000s)	Pre-revised visit share	Revised visits (000s)	Revised visit share	Pre-revised spend (£m)	Pre-revised spend share	Revised spend (£m)	Revised spend share
2009	4,310	14%	4,441	14%	1,863	11%	1,963	11%
2010	4,185	14%	4,207	14%	1,714	10%	1,763	10%
2011	4,304	14%	4,405	14%	1,908	11%	2,014	11%
2012	4,308	14%	4,433	14%	1,898	10%	1,981	10%
2013	4,535	14%	4,627	14%	2,003	9%	2,085	9%
2014	4,647	14%	4,744	13%	2,162	10%	2,328	10%
2015	5,141	14%	5,188	14%	2,242	10%	2,363	10%
2016	5,214	14%	5,337	14%	2,212	10%	2,416	10%
2017	5,320	14%	5,471	13%	2,138	9%	2,324	8%
2018	4,927	13%	5,162	13%	2,007	9%	2,205	8%
2019	N/A	N/A	5,394	13%	N/A	N/A	2,580	9%

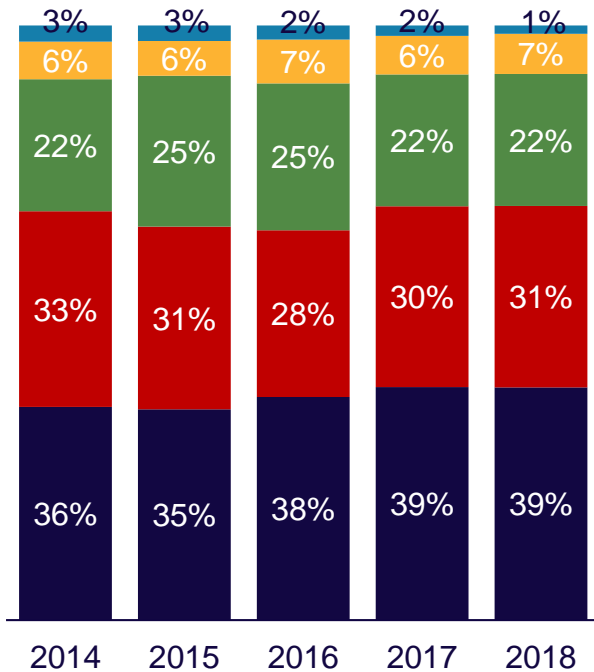
When comparing pre-revised and revised data for the South East, gains can be seen across both visits and spend for every year from 2009-2018, and particularly in later years. The most gains in visits are seen in 2018, with 236,000 visits more, and the most gains in spend were seen in 2016, with gains of £204 million. Overall, percentage share in spend remains similar when comparing the two sets of data.



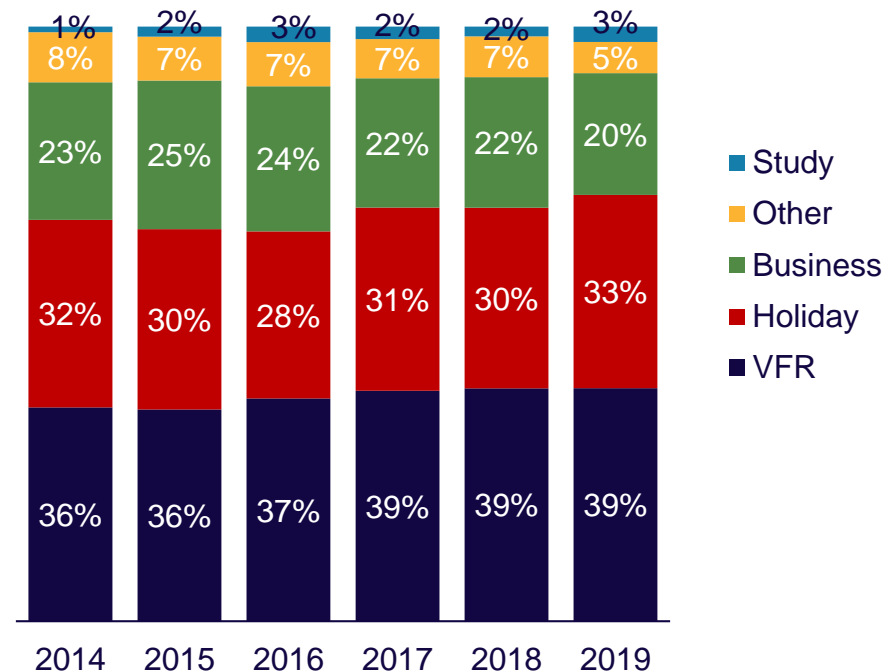


# Journey purpose

Percentage of visits: pre-revision



Percentage of visits: revised

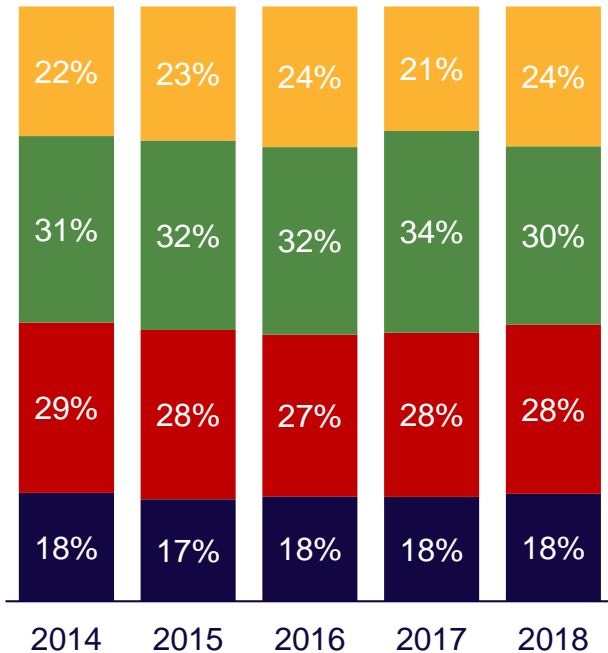


Share of visitors from different journey purposes has remained similar when comparing pre-revised and revised data for the South East from 2014-2018. However, 'Other' gained 2 percentage points in both 2015 and 2014. The Business purpose also gained 1 percentage point in 2014, with the Study and Holiday journey purposes losing share in this year. Study also lost share in 2015.

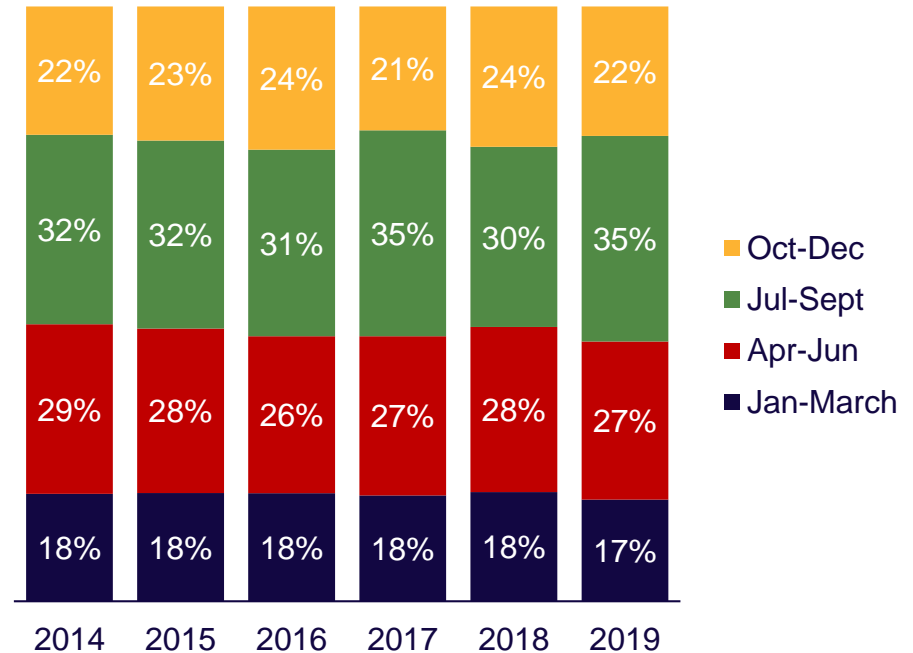


# Seasonality

Percentage of visits: pre-revision



Percentage of visits: revised



Changes in seasonality of inbound visits are slight when comparing pre-revised and revised data for the South East. Quarter two consistently loses 1 percentage point from 2015 to 2018, whereas quarter one gains 1 percentage point in 2015 and 2016, and quarter three gains 1 percentage point in 2017.

# Background to the data adjustments



# How is UK inbound tourism measured?

- The International Passenger Survey (IPS) is a continuous, face to face survey carried out by the Office for National Statistics (ONS). It began in 1961 and covers all major air, sea and tunnel ports, providing detailed information on the numbers and types of visits made by people travelling to and from the UK. Interviewees are selected randomly, at fixed intervals during interviewers' shifts.
  - NB since mid-March, surveying has been suspended due to COVID-19. The ONS are looking into alternative ways of modelling data.
- Data is published regularly by ONS on a monthly, quarterly and annual basis.
- When it comes to measuring inbound tourism to the UK, the most helpful data comes from departing overseas residents (which includes UK nationals or 'expats' who reside outside the UK). As they are interviewed at the end of their visit, this provides complete and reliable answers to questions such as visit duration and spending.

Read more detail about the IPS on the [ONS website](#) and guide to IPS methodology from [VisitBritain](#).

# Why are inbound travel estimates changing?

- Users of the IPS have reported concerns in recent years over an imbalance between the IPS estimates for the number of visitors between departures and arrivals for different nationalities. This has been particularly noted for Chinese visitors, where the IPS has been believed to be under-reporting departures.
- To address this potential issue, a new adjustment method has been developed, which involves updating the weightings applied during survey processing.
- The adjustment process has been developed with the Office for National Statistics (ONS) Methodology team and the Social Statistics department of the University of Southampton using Home Office landing card and other data to give more information about the nationality of foreign based visitors to the UK.
- IPS data from 2009 onwards has been adjusted using this method, and it will continue to apply to future data releases.

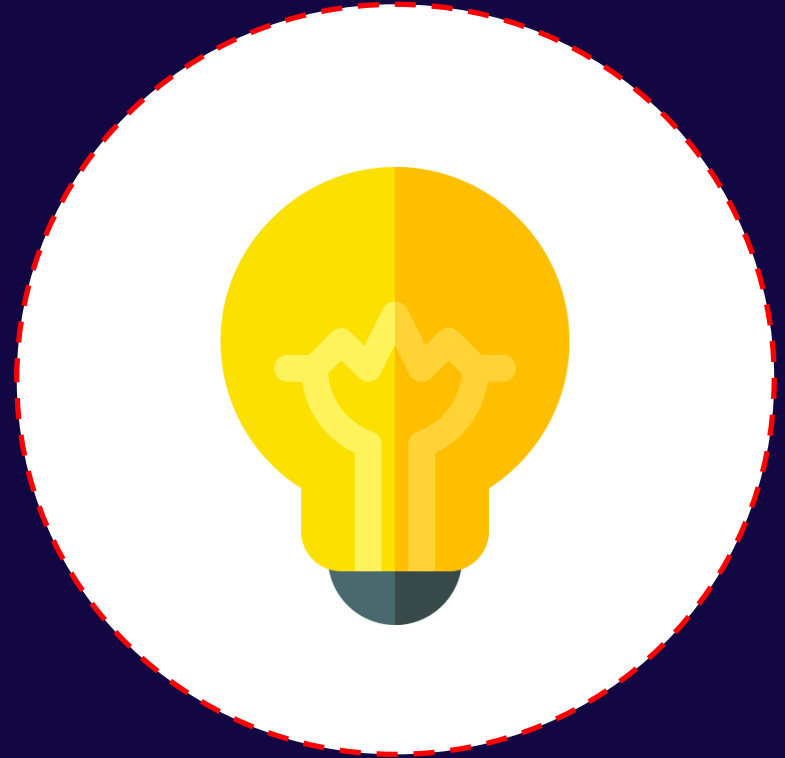
Read more in notes published by the ONS in [July 2018](#) and [March 2020](#).

# What changes have been made to the methodology?

- It isn't possible to interview every single person who visits the UK each year. Therefore, the ONS ensures that a robust sample of those people is interviewed, and a weighting is applied to the information gathered from these interviewees in order to calculate the key data points that can be analysed from the IPS (visits, nights and spend).
- The weighting calculations that the ONS uses are guided by comparisons from existing passenger traffic information from the CAA, Department for Transport, Eurotunnel, BAA and a number of airports themselves. This ensures that estimates of inbound tourism are as realistic as possible. This process is extremely thorough – there are actually eight weighting stages applied to the interview data.
- To address the potential under-reporting of departures from certain nationalities, the ONS analysed the numbers of individuals arriving in the UK, compared to those departing the UK in detail, and also used other data sources as further comparison.
- This comparison allowed the ONS to identify which nationalities required an adjustment in weighting in order to create improved estimates of visits, nights and spend for 2009 IPS data onwards. *Note:* data is presented in this document by country of residence rather than nationality, as this is how VisitBritain targets potential visitors to the UK.

Read more in notes published by the ONS in [July 2018](#) and [March 2020](#).

Next steps



# What do these changes mean for me?

- Adjustments to IPS data, which impact data points all the way back to 2009, may have far reaching implications across the travel and tourism industry.
- What this means will be different for each organisation, but below are some thought starters for next steps that you could take:
  - Look at the new data in more detail, to understand the degree of impact for your area of interest (whether this is a geographic region, international market, journey purpose etc.)
  - Review and amend any internal documents which reference IPS data
  - If you use IPS data as a source for your targets as an organisation, they may need to be updated
  - Communicate the change and what it means for your organisation to any relevant stakeholders or partners

Find more helpful links, and contact details for VisitBritain team members who can answer your questions, on the next slide.



# Explore more data

Over the coming weeks, the suite of data resources from VisitBritain Research will be updated with the revised IPS data.

In particular, look out for:

- Latest monthly and quarterly data from the International Passenger Survey by ONS
- Latest data by area of the UK
- Inbound Tourism Trends by Market

We are here to support you and look forward to working with you.

If you have a specific question or data request, please contact us directly.



# Adjustments to IPS data from 2009 onwards

VisitBritain user guide

May 2020