

# Understanding Business Visits

Foresight – issue 172

VisitBritain Research



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# Introduction

This edition of Foresight looks at the characteristics of the business visitors to the UK during 2018 and the main event type they were in the UK to attend, compared to business visits in 2016.

This analysis comes from the International Passenger Survey (IPS) carried out by the Office for National Statistics (ONS) during 2016 and 2018.

Each year VisitBritain sponsors questions on this survey and during 2016 and 2018 we asked all those in the UK for business a little more about their main business meeting or event on the visit from which they were departing. We are sponsoring the same question again in 2019.

This report updates a previous Foresight report on this topic but further information and interactive visualisations can be found on [the Business visits dedicated page of our corporate website](#).

All spend figures are nominal and exclude the price of getting to the UK but might include expenses outside of the business activity.

All shares of business visit types are calculated excluding 'Don't Know'.

The icons are all designed by Freepik and distributed by Flaticon.

## Other resources

VisitBritain's Business events team focuses on the MICE sector, Meetings, Incentive, Conferences and Events. In this report, we provide an estimate of visits for this type of business visits.

As part of the Discover England Fund, additional research has been completed to further understand the decision making process when selecting a meeting or conference location as well as awareness and consideration of British cities. You can [read our research about motivations and barriers \(in PDF\) on our website.](#)

An [additional report is also available on delegate expenditure and business extenders](#) (delegates who extend their trip for leisure).

And [another report looks at the China MICE Market.](#) It provides key insights to understand the characteristics of the Chinese meetings and incentives market.



# Spotlight on MICE

## MICE – 2018 key metrics

Here, MICE or Meetings, Incentive, Conference and Events is represented by inbound business visits made in 2018 for attending a large meeting (21+ people), an Incentive/ Team building event (or leading on it), a Conference/ Convention/ Congress, or an Exhibition/ Event/ Trade show.

MICE visitors are valuable visitors to the UK, especially compared to leisure visits:

2018 inbound data	MICE	MICE vs Leisure	Leisure
Average Spend per Visit	£770	spending 30% more than...	£594
Average Nights per Visit	4.6	staying 2.5 nights fewer than...	7.1
Average Spend per Night	£167	spending double compared to...	£83

# MICE – summary

This category comprised 17% of all business visits in 2018 with 1.5 million visits. Compared to 2016, this category grew by 10% in volume. In 2018, it represented 18% of all inbound business visits (excluding don't knows).

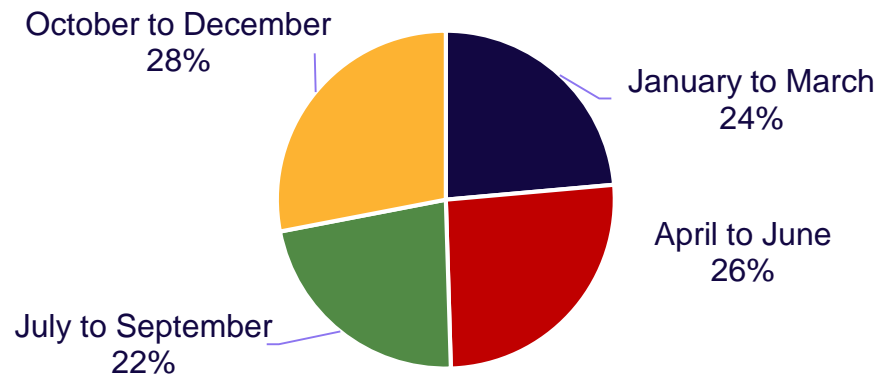
MICE accounted for one quarter of business visit spend, with visitors spending £1.1 billion.

The highest proportion of MICE visits were made during Quarter 4 (Oct-Dec)

The top 5 markets accounted for 47% of the visits and 44% of this category's spend.

The USA was the top market for visits and spend - 180,000 visits and £209 million spend

## Seasonality by visits



Top 5 markets by volume	Visits (000)
USA	180
France	156
Germany	154
Netherlands	106
Irish Republic	93

Top 5 markets by value	Spend (£m)
USA	£209
Germany	£98
France	£89
India	£52
Italy	£45

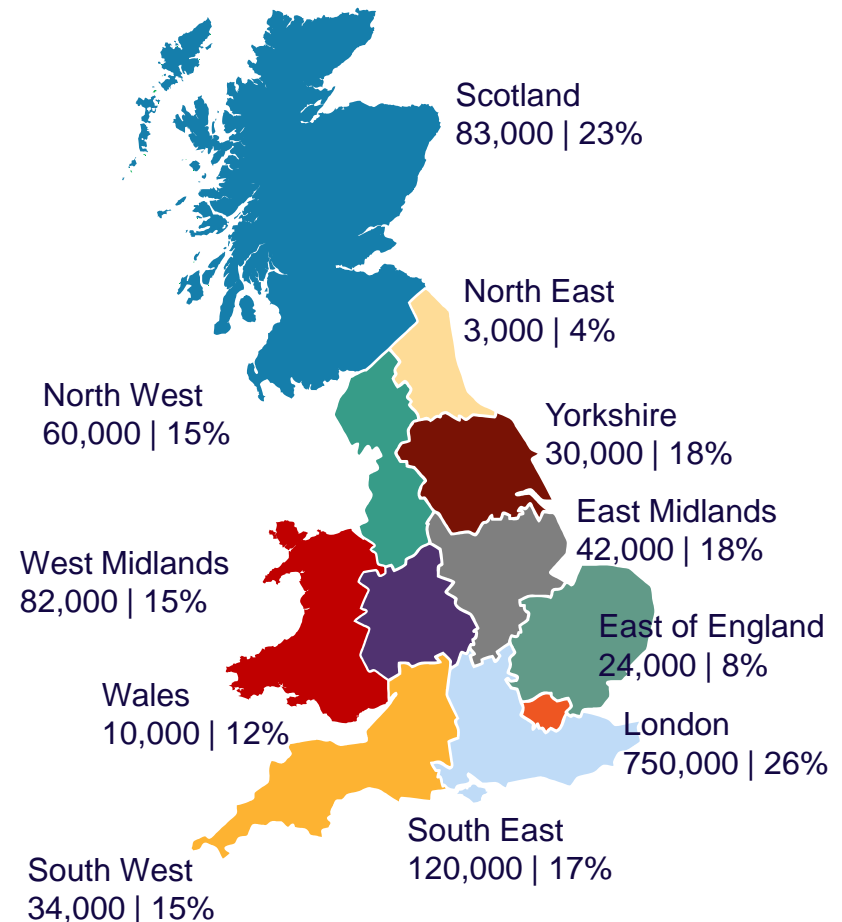
# MICE – regional spread

MICE visits represent just over a quarter of business visits to London, and close to that share of business visits to Scotland. (The %s here show what proportion of all business visits to each region are for MICE; see also note on regional data at the bottom of this page).

There were more MICE visitors in London than any other region with 750,000 such visits, followed by 120,000 MICE visits to the South East (17% of business visits to that area), 83,000 MICE visits to Scotland, and 82,000 MICE visits to the West Midlands (15% of all business visits to that region).

Proportionally, MICE visits were also quite prominent among inbound business visits to Yorkshire and the East Midlands (18%).

Across the UK, MICE visits represented 1 in 5 inbound business visits overall (20% of all business visits, including those to more than one area).



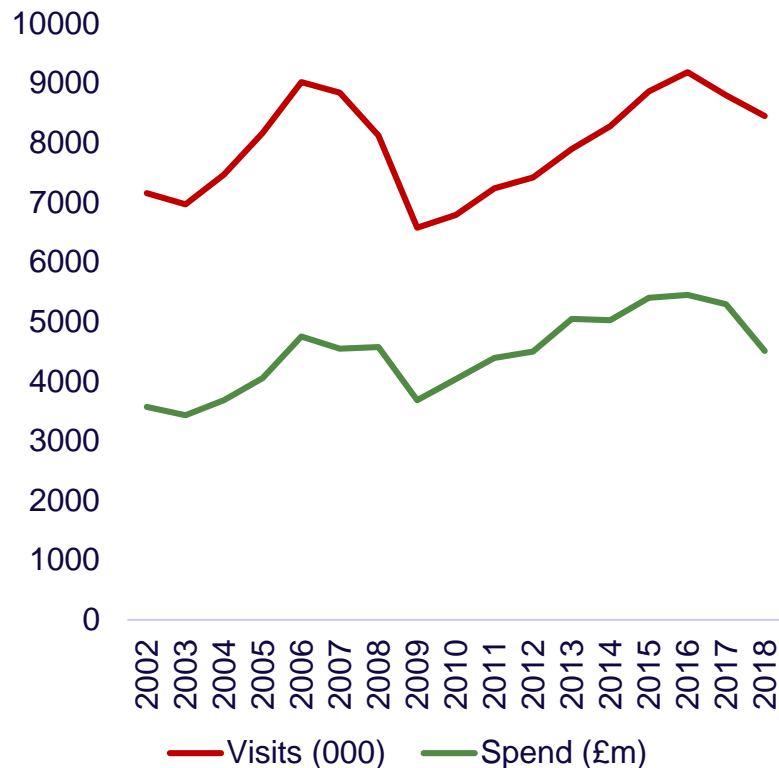




# Business visits in context

# UK business visits and spend

UK Business Visits and Spend 2002 - 2018



In 2018 the UK welcomed 8.4 million business visits – continuing to slip down after the 2016 record. In 2018 business visits accounted for over 1 in every 5 visits to the UK (22%), around the same as the year before.

Business visitors spent a combined £4.5 billion in the UK during 2018.

Despite the recent slowdown in the last couple of years, in 2018 visits and spend were still well above the low point in 2009: +28% in visits and +22% in spend.

Furthermore, business visits in the first six months of 2019 were up 1% on January-June 2018 and business spend up 9%.

## UK business visits – averages

2018	Business	All journey purposes
Total Visits (000)	8,448	37,905
Total Nights (000)	34,411	266,122
Total Spend (£m)	£4,512	£22,897
Average Spend per Visit	£534	£604
Average Nights per Visit	4.1	7.0
Average Spend per Night	£131	£86

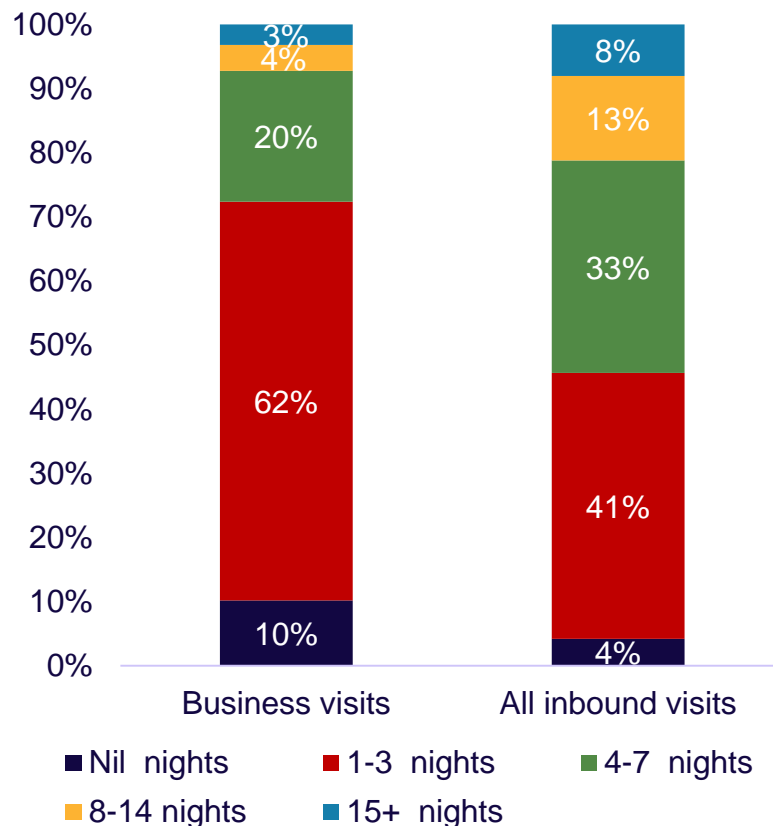
Business visits tend to be shorter than an average visit. However, the average spend per night from a business visitor is £131, over 50% higher than the UK all-purpose average.

Each business visitor to the UK spent on average £534 in 2018; this is 12% lower than the average spend from all purposes of visit.

While the average length of stay has remained fairly consistent over time, the average spend per visit and per night fell in the last two years (-10% and -11% in 2018 vs 2016 respectively).

# UK business visits – duration of stay

## Duration of Stay 2018



As seen on the previous slide, the average length of stay tends to be shorter for business visitors, compared to the all-purpose average.

Indeed, visits lasting 1-3 nights are the most common length of stay for a business visit, accounting for 62% of those in 2018, compared to 41% across all journey purposes.

Longer stays of more than 2 weeks comprised just 3% of business visits in 2018, vs 8% for all purposes.

During 2018, 1-in-10 business visits was classed as a day visit – with the visitor not staying any nights (vs. 4% for all inbound visits).

## Business visits – mode of travel

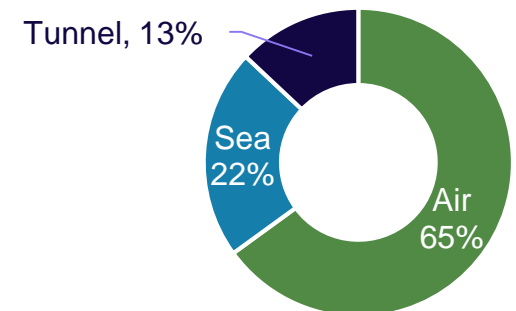
The vast majority of visitors to the UK arrive by air – that is through one of the UK’s many airports. Business visitors are no exception to this, with 65% arriving in the UK through an airport in 2018.

However, a higher proportion of business visitors arrive through a sea port than for other journey purposes – 22% vs 13% for all journey purposes in 2018.

Arrivals through the tunnel in 2018 are about on par for business visits and all journey purposes (13% vs 11% respectively). They were about evenly split between lorry drivers coming through the tunnel and visitors using the Eurostar, with only a handful coming with their car through the tunnel.

Business tourism is not just about activity in an office, conference centre or exhibition hall but includes all work related purposes and those who are coming to the UK in order to collect or deliver goods. Of the 8.4 million business visits in 2018, 25% were by those driving a lorry\*.

### Mode of travel Business visits



## Business visits – seasonality

2018 shares	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
<b>Visits</b>	25%	25%	24%	25%
<b>Nights</b>	22%	27%	27%	24%
<b>Spend</b>	27%	24%	25%	25%

Business visits do not show the seasonality generally seen in tourism flows, with visits almost evenly spread throughout 2018.

In comparison, 32% of holiday visits, 36% of holiday spend and 38% of holiday nights took place in July-September 2018.

For the UK tourism industry this helps to maintain a year round tourism offer.

Nights and spend do show some effect of seasonality – though the extent is very modest. 27% of nights took place in each Q2 and Q3 while only 22% of nights happened between January and March. However, spend was more evenly distributed amongst the quarters.

# Business visits

## Regional Distribution

London leads by some distance on share of visits, nights and spend. South East and West Midlands over index on visit shares, but only South East sees more than 10% of business spending outside London.



Region	Visits (000)	UK visits share (%)	Spend (£m)	UK spend share (%)	Nights (000)	UK night share (%)
Scotland	472	6%	£243	5%	2,208	7%
Wales	147	2%	£55	1%	684	2%
London	3,515	42%	£2,480	55%	13,443	40%
North East	106	1%	£87	2%	901	3%
North West	714	8%	£250	6%	2,566	8%
Yorkshire	318	4%	£134	3%	1,600	5%
West Midlands	893	11%	£308	7%	2,798	8%
East Midlands	371	4%	£131	3%	1,564	5%
East Of England	479	6%	£127	3%	1,638	5%
South West	376	4%	£140	3%	2,187	6%
South East	1,094	13%	£426	9%	3,812	11%

## Share of business vs. other purposes

42% of inbound visits to the West Midlands in 2018 were for business, 23% of visits to the North East, the North West and Yorkshire, and 22% of visits to the East of England and the South East. In comparison, only 18% of visits to Scotland were for business, 16% of visits to Wales, and 13% of visits to Scotland.

Region	Holiday	Business	VFR	Study	Other
Scotland	56%	13%	28%	1%	1%
Wales	43%	16%	36%	1%	4%
London	50%	18%	26%	1%	5%
North East	31%	23%	43%	1%	2%
North West	32%	23%	34%	2%	9%
Yorkshire	29%	23%	45%	1%	2%
West Midlands	20%	42%	34%	1%	2%
East Midlands	22%	30%	44%	2%	2%
East of England	28%	22%	44%	2%	5%
South West	42%	16%	38%	2%	2%
South East	31%	22%	39%	1%	7%
Total UK	40%	22%	31%	1%	5%



Base: Scotland (2,429), Wales (929), London (14,475), North East (400), North West (2,740), Yorkshire (1,241), West Midlands (1,468), East Midlands (754), East of England (1,263), South West (2,387), South East (3,758), Total UK (33,180). 2018 data.



# Activities undertaken by business visitors

Not surprisingly, business visitors undertook activities at a lower rate than the average while in the UK.

That said, the most popular activities during a business visit to the UK in terms of volume of business visits including such activities:

- Dining in restaurants (49%)
- Going to the pub (24%)
- Going shopping (21%)
- Socialising with the locals (15%)
- Sightseeing famous monuments or buildings (12%)

Those having participated in those activities also spent more in the UK on average during their business visit.

Business visitors from New Zealand, Canada and Australia were the most likely to participate in most of those top activities alongside their business visit when in the UK. For more data on the propensity of business visitors to participate in selected activities while in the UK, download the data available at the bottom of [this page](#).



# Business Visits by market

# Top 10 business markets in 2018

## Visits

The top 10 markets generated 68% of all business visits to the UK in 2018 and include just one long haul market.

The importance of our location and proximity to Europe is notable here, with 9 of the 10 top business markets in 2018 being European.

Inbound business tourism is not all about activity taking place in an office, conference centre or exhibition hall. The IPS collects information on any overseas resident who is making a trip to the UK for work related purposes including those who are coming to the UK in order to collect or deliver goods. Over 3 in 4 business visits from Poland and Romania were made by a lorry driver.

Market	Visits (000)	% share
Poland	831	10%
Germany	802	9%
USA	742	9%
France	740	9%
Netherlands	571	7%
Irish Republic	544	6%
Romania	494	6%
Spain	395	5%
Italy	346	4%
Belgium	241	3%

# Top 10 business markets

## Spend

When looking at the 2018 top 10 markets in terms of value, European markets still make up most of the list with 6 out of 10 inbound markets.

The top 10 markets accounted for 59% of all business spending in the UK in 2018.

The value of the USA is noticeable here – contributing more than 3 times the spend of business visitors as France did, despite similar visit volumes.

Market	Spend (£m)	% share
USA	£850	19%
Germany	£354	8%
France	£252	6%
Irish Republic	£190	4%
Netherlands	£182	4%
India	£182	4%
Italy	£181	4%
Spain	£164	4%
Romania	£150	3%
Poland	£136	3%

## Average spend per business visit\*

Market	Visits (000)	Spend (£m)	Average spend per visit
South Africa	34	£63	£1,846
Singapore	39	£60	£1,559
China	43	£64	£1,480
Hong Kong	37	£53	£1,454
Australia	47	£68	£1,443
UAE	63	£88	£1,385
India	132	£182	£1,380
Brazil	19	£26	£1,353
USA	742	£850	£1,146
Japan	74	£77	£1,052
Canada	74	£75	£1,011
Russia	66	£54	£823
Israel	40	£32	£799
Switzerland	179	£108	£606
Turkey	63	£35	£563
Norway	150	£83	£556
Denmark	131	£71	£540
Italy	346	£181	£523
Finland	37	£17	£466
Germany	802	£354	£442

11 markets had an average spend per business visit higher than £1,000 in 2018 – these were all long haul markets to the UK.

A business visitor from South Africa spent over 4 times as much as a business visitor from Germany in 2018, though there were over twenty inbound business visits from Germany for every one from South Africa.

The average spend per visit for business visits to the UK in 2018 was £534 (compared to an average spend for all journey purposes of £604).

## Average number of nights per business visit\*

Market	Visits (000)	Nights (000)	Average length of stay
India	132	2,088	15.8
South Africa	34	376	11.0
Brazil	19	163	8.4
Bulgaria	125	1,039	8.3
Romania	494	3,730	7.6
Australia	47	354	7.5
Japan	74	549	7.5
Hungary	184	1,170	6.4
China	43	259	6.0
Singapore	39	211	5.4
USA	742	3,937	5.3
United Arab Emirates	63	301	4.8
Canada	74	350	4.7
Israel	40	187	4.7
Hong Kong	37	171	4.7
Turkey	63	275	4.4
Russia	66	258	3.9
Poland	831	3,130	3.8
Norway	150	495	3.3
Spain	395	1,293	3.3

Generally, business visits have a shorter length of stay than other journey purposes – only 7 markets had an average business length of stay above 7 (which was the UK average for all journey purposes of in 2018).

The top 3 inbound business visit markets by length of stay are all long-haul markets to the UK\*, with India topping this ranking with the average business visit lasting over two weeks in 2018.

Bulgaria and Romania were the only European markets where business visitors stayed for a week or more on average in 2018.



# Business visits by type

# Business visits in more detail

While we have an understanding of the main purpose visitors are in the UK for each year, VisitBritain sought to understand more about the types of business meeting or event visitors were attending in 2016 and 2018.

Understanding business visits at this level is important as the needs of different visitors can vary greatly. A small meeting may be held in an office meeting room while a larger conference may require provisions of accommodation, catering, breakout space, transport and after hours entertainment.

Most inbound visitors coming to the UK for business in 2016 and 2018 were asked a follow up question to capture the main reason for their business trip. Lorry drivers were mostly dealt with separately; we asked the others about the following categories:

- Meeting 1-5 people
- Meeting 6-20 people
- Meeting 21+ people
- Incentive/Team building
- Conference/Convention/Congress
- Exhibition/Event/Trade show
- Training/Development
- Lorry Drivers
- Other/Don't Know

We would group Meeting 21+ people, Incentive/Team building, Conference/Convention/Congress, and Exhibition/Event/Trade show as Meetings, Incentive, Conferences and Events (MICE).



## Business visit types in 2018

Business visit type	Visits (000)	Nights (000)	Spend (£m)
Meeting 1-5 people	1,923	5,592	£977
Meeting 6-20 people	1,411	4,372	£942
MICE	1,461	6,753	£1,126
Meeting 21+ people	467	2,115	£349
Incentive/Team Building	70	678	£62
Conference/Convention/Congress	568	2,386	£415
Exhibition/Event/Trade Show	356	1,573	£299
Training/Development	490	3,225	£457
Lorry driving	2,048	4,490	£186
Other	894	8,939	£679
<i>Don't Know</i>	220	1,039	£144
<b>ALL BUSINESS VISITS</b>	<b>8,848</b>	<b>34,411</b>	<b>£4,512</b>

2.0 million visits were made by lorry drivers in 2018, the most common business sub-category.

There were 3.3 million business visits in the UK in 2018 for attending small and medium sized meetings (up to 20 people).

Larger meetings, visits for an Exhibition / Event / Trade Show, an Incentive / Team Building event, or a Conference / Convention / Congress all added up to just short of 1.5 million MICE\* visits to the UK in 2018.

Training/Development drew 490,000 visits to the UK in the same year.

Source: International Passenger Survey 2018 by the ONS; Base: Meeting 1-5 (1,829), Meeting 6-20 (1,463), Meeting 21+ (482), Conference (581), Training (459), Exhibition (290), Incentive (67), Lorry (1,100), Other (769) and Don't Know (163); all business visits (7,203), MICE (1,420); \*Meetings, Incentive, Conferences and Events

## Business visit types: 2018 key metrics

Business visit types	Length of stay	Spend per visit	Spend per night
Meeting 1-5 people	2.9	£508	£175
Meeting 6-20 people	3.1	£668	£215
Meeting 21+ people	4.5	£748	£165
Conference/ Convention	4.2	£731	£174
Exhibition/Trade Show	4.4	£841	£190
Incentive/Team Building	9.7	£889	£92
Training/Development	6.6	£933	£142
Lorry	2.2	£91	£42
Other	10.0	£759	£76
MICE	4.6	£770	£167
All inbound business visits	4.1	£534	£131

Lorry drivers stay fewer nights on average than all other categories of business visitor. As they also spent the least per night on average, they also have the smallest average spend per visit (£91 in 2018).

Those on a team building or an incentive trip stayed close to 10 nights, similar to the 'Other' category. Those spending the most per visit were coming for training or development, spending £933 on average during their trip to the UK.

Finally, those visiting for a medium-size meeting (6-20 people) spent the most per night (£215), followed by those whose visit was to attend an exhibition or trade show (£190).











## Business visit type in 2018: by age and gender

Men were more likely to attend a business visit across all of the categories captured. Women comprised 30-40% of those attending a conference or convention, a training or development trip, a large meeting, an exhibition or trade show, and an incentive or team building trip.

The differences in attendance by age group follows a similar pattern, with 35-54 year olds dominating all business categories, but for 'incentive/team building' for which the majority was 16-34 years old (52%). 55+ were the most represented in large meetings (gathering 21 people or more).

Business Visit Type	Male	Female	16-34 years	35-54 years	55+ years
Meeting 1-5 people	77%	23%	20%	67%	12%
Meeting 6-20 people	76%	24%	18%	67%	13%
Meeting 21+ people	66%	34%	19%	64%	15%
Conference/Convention	67%	32%	25%	61%	13%
Training/Development	67%	33%	35%	57%	7%
Exhibition/Trade Show	62%	38%	36%	54%	9%
Incentive/Team Building	60%	39%	52%	41%	6%
Lorry drivers	99%	1%	22%	64%	13%
Other	80%	20%	33%	54%	11%
<b>TOTAL UK</b>	<b>80%</b>	<b>20%</b>	<b>24%</b>	<b>63%</b>	<b>12%</b>

## Business visits by type: 2016 vs 2018 table

Business sub category	Visits (000) 2016	Visits (000) 2018	Growth 2016 vs 2018	% share of visits (2016)	% share of visits (2018)	Change in share
Lorry	2,341	2,048	-13%	27%	25%	 -2pp
Meeting (1-5 people)	1,795	1,923	7%	21%	23%	 +3pp
Meeting (6-20 people)	1,670	1,411	-15%	19%	17%	 -2pp
Other	1,165	894	-23%	13%	11%	 -3pp
Conference/Convention/Congress	563	568	1%	7%	7%	 0pp
Training Event/Development	351	490	39%	4%	6%	 +2pp
Meeting (21+ people)	491	467	-5%	6%	6%	 0pp
Exhibition/Event/Trade Show	203	356	75%	2%	4%	 +2pp
Incentive/Team Building	68	70	3%	1%	1%	 0pp
MICE	1,325	1,461	10%	15%	18%	 +2pp
Don't know	541	220				

Base: Meeting 1-5 (1,829), Meeting 6-20 (1,463), Meeting 21+ (482), Conference (581), Training (459), Exhibition (290), Incentive (67), Lorry (1,100), Other (769) and Don't Know (163) (shares excluding "Don't know", pp stands for 28 percentage point)

# Business visits by type: 2016 vs 2018 overview

Lorry drivers comprise the largest share of business visits to the UK in 2016 and 2018, with one-in-four business visits in 2018, despite a decline in share.

Small meetings (1-5 people) have grown 7%, increasing share within business visits by 3pp to 23%.

Visits for medium sized meetings (6-20) have fallen 15%, losing 2pp share to 17%.

The 'Other' category has fallen 23% in visits, losing 3pp share to 11%.

Visits for Training/Development purposes have grown 2pp in market share to 6%, with visits up 39% on 2016.

The MICE segment has grown 10% in visits, comprising 18% of business visits in 2018, +2pp on 2016. Within this, large meetings (21+ people) have fallen 5% but has maintained market share within business visits, Incentive/Team Building visits (+3% on 2016) remains at 1% market share, visits for Conferences, Conventions or Congress has remained stable, whilst visits for exhibitions has grown 7%, +2pp in market share.

# Business visit share by type and area in Britain

Nations/regions	Meeting 1-5	Meeting 6-20	Meeting 21+	Incentive	Conference	Exhibition	Training	Lorry	Other	MICE
Scotland	26%	27%	6%	<1%	10%	7%	12%	6%	6%	23%
Wales	13%	12%	5%	1%	5%	1%	10%	21%	32%	12%
London	30%	21%	8%	1%	11%	7%	7%	6%	10%	26%
North West	16%	15%	4%	<1%	8%	2%	5%	40%	10%	15%
North East	20%	10%	2%	0%	2%	0%	14%	32%	20%	4%
Yorkshire	16%	15%	14%	0%	4%	<1%	5%	31%	15%	18%
West Midlands	13%	14%	2%	<1%	5%	8%	6%	41%	10%	15%
East Midlands	8%	13%	9%	1%	4%	4%	7%	40%	14%	18%
East of England	15%	12%	1%	1%	6%	1%	7%	46%	12%	8%
South West	12%	16%	6%	1%	6%	2%	5%	41%	11%	15%
South East	19%	18%	7%	1%	6%	3%	8%	28%	10%	17%
<b>Total UK</b>	<b>23%</b>	<b>17%</b>	<b>6%</b>	<b>1%</b>	<b>7%</b>	<b>4%</b>	<b>6%</b>	<b>25%</b>	<b>11%</b>	<b>18%</b>

London and Scotland both over index for small and medium-size meetings, as well as conferences and exhibitions, compared to the UK average overall. However, both received the smallest share of visits by lorry drivers (6%). Wales receives a larger share of visits for training than the UK average, as do Scotland and the North East of England. Looking at the other English regions, large meetings were more popular in Yorkshire and the East Midlands than average. The share of business visitors going to exhibitions is higher in East Midlands than for the UK overall.

# Business spend share by type and area in Britain

Nations/regions	Meeting 1-5	Meeting 6-20	Meeting 21+	Incentive	Conference	Exhibition	Training	Lorry	Other	MICE
Scotland	22%	30%	4%	<1%	10%	16%	7%	1%	10%	30%
Wales	14%	13%	6%	2%	6%	1%	19%	1%	38%	15%
London	27%	25%	9%	1%	12%	9%	8%	1%	9%	31%
North West	16%	16%	18%	6%	<1%	13%	4%	13%	7%	24%
North East	15%	9%	<1%	0%	1%	0%	53%	1%	21%	1%
Yorkshire	11%	11%	12%	0%	3%	<1%	17%	1%	44%	15%
West Midlands	10%	22%	3%	0%	8%	13%	13%	4%	27%	25%
East Midlands	7%	11%	12%	2%	9%	1%	40%	4%	14%	24%
East of England	18%	25%	<1%	4%	11%	2%	25%	6%	9%	17%
South West	16%	28%	9%	3%	9%	4%	14%	3%	14%	25%
South East	23%	21%	9%	2%	8%	5%	13%	4%	15%	23%
<b>Total UK</b>	<b>22%</b>	<b>22%</b>	<b>8%</b>	<b>1%</b>	<b>10%</b>	<b>7%</b>	<b>10%</b>	<b>4%</b>	<b>16%</b>	<b>26%</b>

Meetings of up to 20 people comprised over half of inbound spend on business visits to London. Medium-size meetings (6-20 people) were 25-30% of inbound business spend in Scotland, the South West and the East of England. Spend on large meetings over-indexed in the North West, Yorkshire and the East Midlands. Spend share for Exhibitions was higher in Scotland, the North West and the West Midlands than in UK average.

# Business night share by type and area in Britain

Nations/regions	Meeting 1-5	Meeting 6-20	Meeting 21+	Incentive	Conference	Exhibition	Training	Lorry	Other	MICE
Scotland	14%	26%	3%	1%	9%	24%	8%	3%	11%	37%
Wales	8%	6%	5%	<1%	3%	1%	14%	8%	55%	9%
London	24%	19%	9%	2%	10%	7%	9%	3%	17%	28%
North West	9%	11%	4%	<1%	9%	1%	7%	23%	35%	14%
North East	9%	5%	<1%	0%	<1%	0%	19%	8%	59%	1%
Yorkshire	7%	8%	29%	0%	2%	<1%	10%	13%	31%	31%
West Midlands	11%	12%	3%	<1%	7%	7%	16%	24%	19%	17%
East Midlands	6%	6%	14%	2%	5%	3%	24%	17%	23%	24%
East of England	14%	9%	1%	1%	9%	1%	22%	24%	19%	12%
South West	12%	15%	5%	1%	8%	2%	6%	20%	31%	16%
South East	15%	17%	6%	1%	8%	4%	12%	13%	23%	20%
<b>Total UK</b>	<b>17%</b>	<b>13%</b>	<b>6%</b>	<b>2%</b>	<b>7%</b>	<b>5%</b>	<b>10%</b>	<b>13%</b>	<b>27%</b>	<b>20%</b>

Half of the nights spent in Scotland by inbound business visitors were for medium-size meetings or exhibitions. Over half of the nights in Wales were for 'Other' business purposes, with nights spent by those visiting for training also over indexed vs. the UK share (14% vs 10% respectively). The latter category also over indexed in the North East, the East and West Midlands, and the East of England. About 1 in 4 nights spent in London was for a small meeting, but night shares for conferences, medium and large meetings also over-indexed on the UK averages. Large meetings accounted for a larger night share in the East Midlands and Yorkshire.

Base (2018): Scotland 267; Wales 102; London 2,823; North East 54; North West 392; Yorkshire 142; West Midlands 380; East Midlands 156; East of England 175; South West 254; South East 655. Data here shows those who only stayed in one region while in the UK. NB sample size is small for some regions so results are indicative. 32





# Business visit type summaries

# Meetings 1-5 people

Small meetings was the largest meeting category, accounting for 23% of business visits (1.9 million visits).

Visitors in the UK for a small meeting spent £1 billion in 2018, making this the most valuable of the business categories.

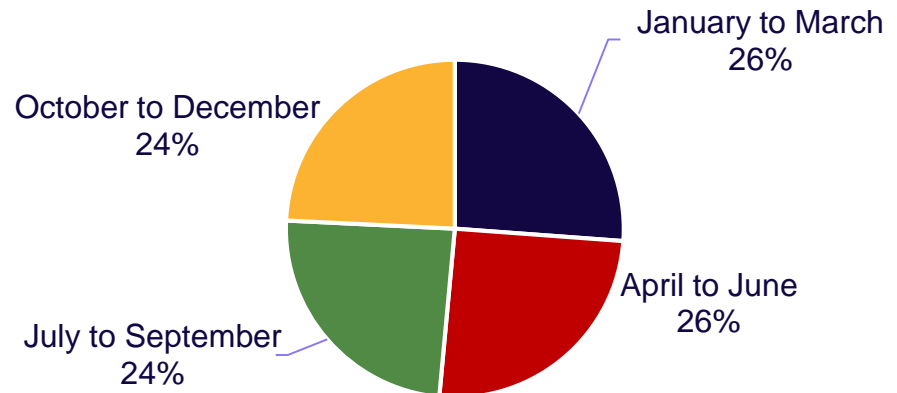
In terms of visits, the top 5 markets contributed 52% of the visits and 43% of the spend in this category.

The seasonality of small meetings was relatively even in 2018 with Q1 & Q2 each accounting for 26% of small meetings.

Over 1/5 of the spending by these visitors in 2018 was from business visitors from the USA.

Outside of the top 5 markets, India held a 2% share of visits but contributed 4% of total value of these small meetings.

## Seasonality by visits



Top 5 markets by volume	Visits (000)
Germany	247
France	216
USA	203
Netherlands	191
Irish Republic	149

Top 5 markets by value	Spend (£m)
USA	£197
Germany	£79
France	£57
Italy	£46
India	£43

# Meetings 6-20 people

Medium sized meetings represented 17% of business visits in 2018, accounting for 1.4 million visits.

Visitors attending these meetings spent £942 million in 2018, the second most valuable business category.

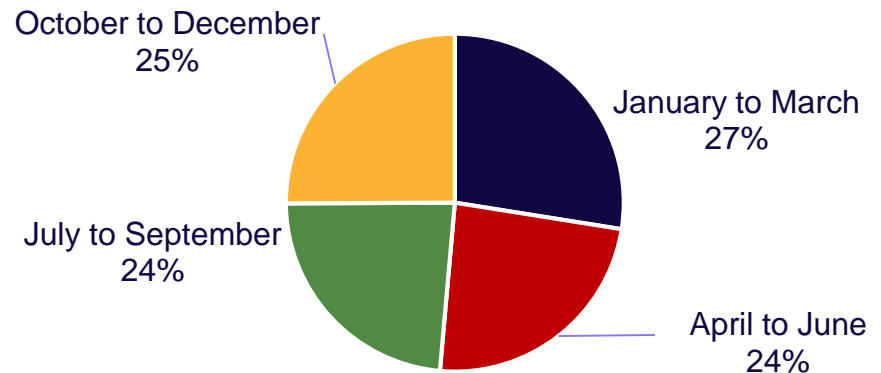
The top 5 markets contributed 53% of the visits and 49% of the spend in this category.

The USA accounted for 28% of spend in 2018.

27% of medium sized meetings were in Quarter 1 (January-March).

USA and India had an average visit spend in excess of £1,000 on average per visit last year.

Seasonality by visits



Top 5 markets by volume	Visits (000)
USA	222
Germany	180
France	145
Netherlands	105
Irish Republic	102

Top 5 markets by value	Spend (£m)
USA	£263
Germany	£74
France	£44
Netherlands	£41
India	£40

# Large meetings 21+ people

Large meetings accounted for 6% of business visits in 2018 – 467,000 visits.

Visitors attending these large meetings spent a total of £349 million in 2018.

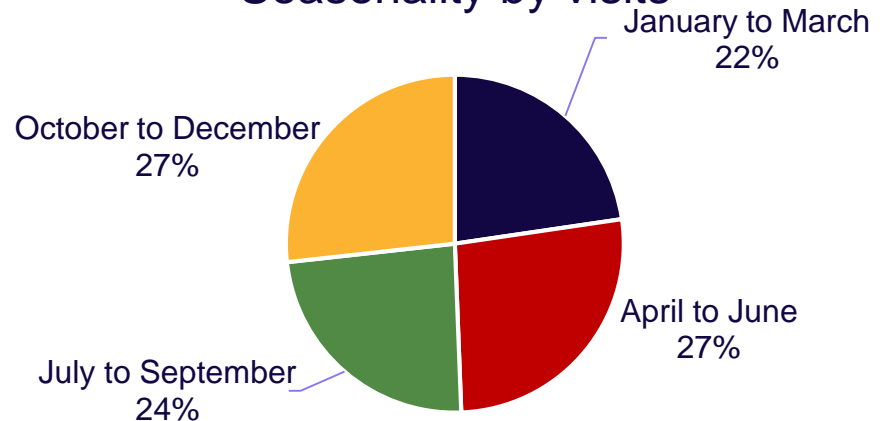
The top 5 markets represented 53% of visits and 50% of spend.

27% of the large meetings were held during Q2 and Q4.

4 of the top 5 volume generating markets are visiting from Europe, 3 out of the top 5 in value.

Visitors from the USA spend more than 3 times the amount of those from Germany when in the UK for a large meeting.

Seasonality by visits



Top 5 markets by volume	Visits (000)
USA	77
France	56
Germany	45
Poland	36
Netherlands	31

Top 5 markets by value	Spend (£m)
USA	£93
Germany	£27
France	£20
Poland	£17
India	£16

# Incentive and team building

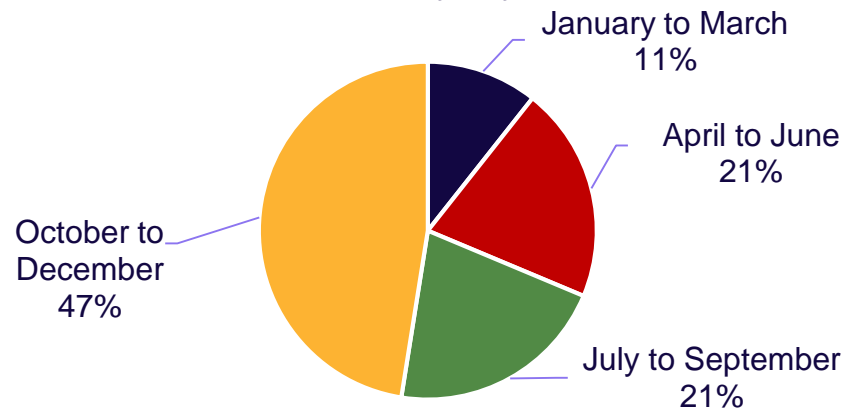
This was the smallest business group in 2018 – contributing 70,000 visits and £62 million in spend.

47% of incentive visits were during October to December in 2018.

The top 5 markets accounted for 45% of the visits and 64% of this category's spend.

France ranked 1<sup>st</sup> for visits and spend, with 13,000 visits bringing in £20 million in spend.

Seasonality by visits



Top 5 markets by volume	Visits (000)
France	13
USA	9
Germany	4
Spain	3
Canada	2

Top 5 markets by value	Spend (£m)
France	£20
USA	£9
Germany	£4
Spain	£4
Canada	£4

# Conferences, conventions and congresses

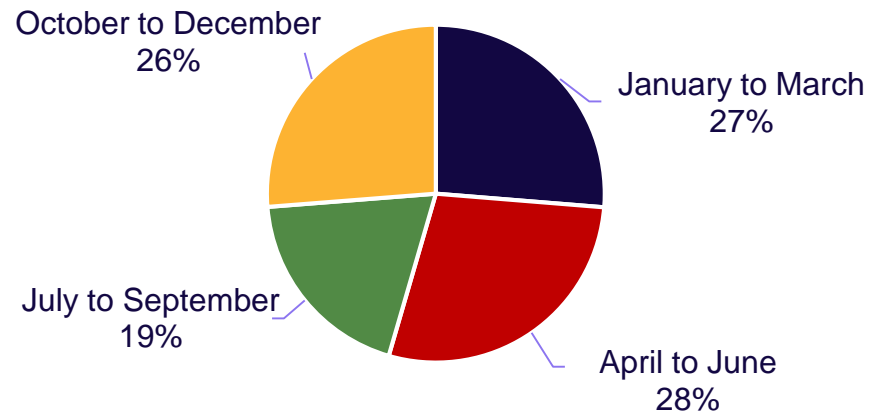
There were 568,000 visits for conferences in 2018, spending £415 million.

The top 5 markets contributed 44% of visits and 39% of spend.

The USA accounted for 17% of all expenditure and had a spend per visit over £1000.

The summer months (July-September) are the quietest quarter for attending conferences in the UK, whilst April-June was the most popular season for visits.

Seasonality by visits



Top 5 markets by volume	Visits (000)
Germany	71
USA	66
France	43
Netherlands	41
Irish Republic	29

Top 5 markets by value	Spend (£m)
USA	£69
Germany	£36
France	£25
Norway	£18
Netherlands	£15

# Exhibitions and trade shows

Attendees to exhibitions or trade shows spent £299 million across 356,000 visits in 2018.

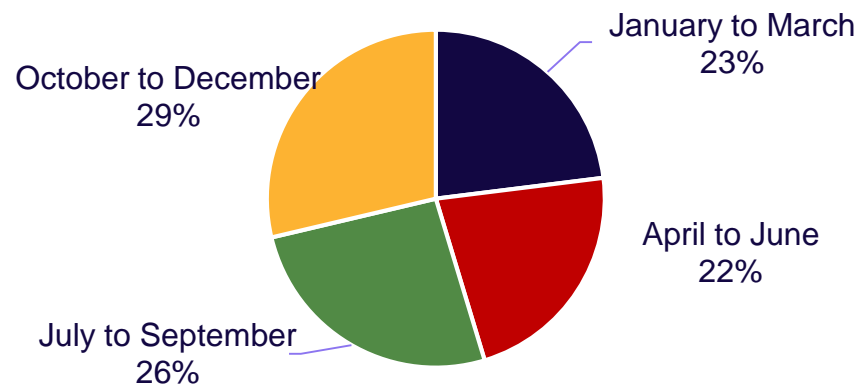
France ranks 1<sup>st</sup> for visits, accounting for 44,000 visits.

The USA takes top place for value, bringing in £38 million.

Whilst India ranks 9<sup>th</sup> for volume, it ranks 4<sup>th</sup> for value.

The majority (55%) of exhibitions and trade shows were held in the second half of 2018.

## Seasonality by visits



Top 5 markets by volume	Visits (000)
France	44
Irish Republic	41
Germany	35
Netherlands	28
USA	28

Top 5 markets by value	Spend (£m)
USA	£38
Germany	£32
France	£23
India	£21
Italy	£19

# Training events and development

Training and development includes visitors both receiving training and those who were in the UK to host a training session.

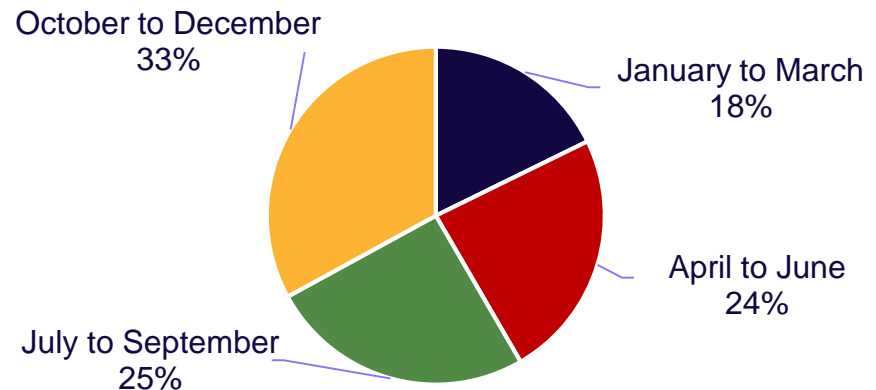
This business category contributed 490,000 visits and a combined spend of £457 million in 2018.

The top 5 markets contributed 40% of the visits and 38% of the spend

8 out the top 10 generating markets are visiting from Europe.

The last quarter of the year was the busier period for business visitors to be in the UK for training and development, with 33% of visits occurring from Oct-Dec, whilst only 18% took place in January-March.

Seasonality by visits



Top 5 markets by volume	Visits (000)
Netherlands	40
Italy	40
Germany	40
France	37
USA	37

Top 5 markets by value	Spend (£m)
USA	£64
Belgium	£32
Netherlands	£26
India	£25
Spain	£25



# Lorry drivers

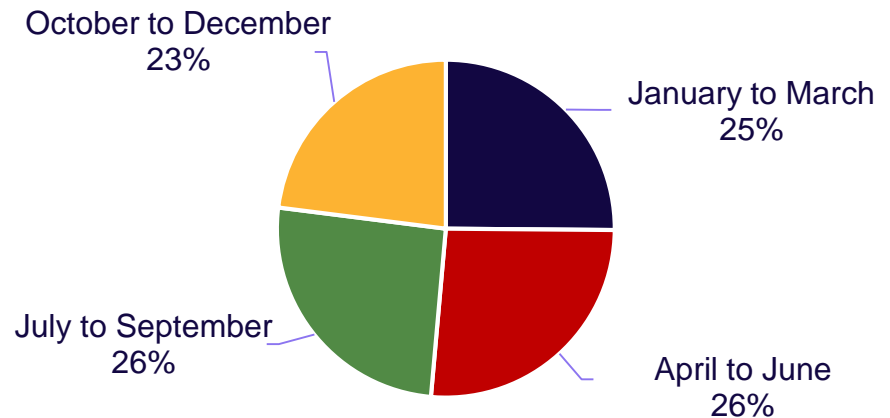
This business category is the most common with lorry drivers accounting for one in four business visits made from overseas to the UK. However, they comprised only 4% of all business spending with the lowest average length of stay and spend per night of all business visit types in 2018.

This category contributed 2.0 million inbound visits and a combined spend of £186 million in 2018.

The top 5 markets by volume contributed 67% of the visits and spend made by lorry drivers overall, but the top 2 markets made up half of visits and only 37% of spend.

In 2018, virtually all lorry drivers came from Europe, with only a few arriving from Africa.

Seasonality by visits



Top 5 markets by volume	Visits (000)
Poland	637
Romania	390
Hungary	134
Bulgaria	105
Spain	101

Top 5 markets by value	Spend (£m)
Poland	£47
Hungary	£26
Romania	£21
Bulgaria	£18
Spain	£12



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