

News Release



Olivier Ponti, VP Insights, ForwardKeys

USA, Australia and India remain the UK's top tourism markets

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A study for World Travel Market, undertaken by ForwardKeys, the travel analytics firm, has produced rankings of the top long-haul inbound tourism markets for the UK and how they have evolved over the past year and the past five years. The first ranking identifies the top 30 countries and the second, the top 50 cities. The rankings are based on flight bookings to the UK for the moving year, 1st October 2018 – 30th September 2019, benchmarked against the same dates one year before and five years before. This time period has been chosen in order to be as up to date as possible.

The top three positions in both lists have remained unchanged over the past five years; for countries, the order is USA, Australia, India and for cities, it is New York, Hong Kong, Sydney. However, as one looks down both lists, there have been some very significant risers and fallers. During the past year, Nigeria has made it back in to the top 10 countries, kicking out the UAE, and Bangladesh has made it into the top 30, replacing Chile. Impressive growth has been recorded from several markets, most notably Bangladesh, up 32.5%, China, up 19.8% and Taiwan, up 16.0%.


Behind these changes are some strong trends, including the continued growth of China and other Asian economies, the strength of the US dollar, improvements in connectivity, recovery of commodity prices, particularly, oil, the Argentine debt crisis and the attractiveness of cricket world cup! The country ranking is shown in the table below.


**Top 30 long-haul origin countries for the United Kingdom,
based on air arrivals, 2014-2019**

Ranking 2019	Growth vs 2018	Country	Ranking Change vs 2018	Ranking Change vs 2014	Ranking 2018	Ranking 2014
1	+9.5%	U.S.A/US	0	0	U.S.A/US	U.S.A/US
2	-2.1%	Australia/AU	0	0	Australia/AU	Australia/AU
3	+14.5%	India/IN	0	0	India/IN	India/IN
4	+19.8%	China/CN	0	+1	China/CN	Canada/CA
5	+1.9%	Canada/CA	0	-1	Canada/CA	China/CN
6	+7.4%	Hong Kong/HK	0	0	Hong Kong/HK	Hong Kong/HK
7	+13.8%	Japan/JP	+1	0	South Korea/KR	Japan/JP
8	-0.1%	South Korea/KR	-1	+4	Japan/JP	Nigeria/NG
9	+11.3%	South Africa/ZA	+1	+2	United Arab Emirates/AE	Brazil/BR
10	+13.7%	Nigeria/NG	+2	-2	South Africa/ZA	United Arab Emirates/AE
11	+2.5%	United Arab Emirates/AE	-2	-1	Brazil/BR	South Africa/ZA
12	+3.5%	Brazil/BR	-1	-3	Nigeria/NG	South Korea/KR
13	+0.4%	New Zealand/NZ	0	0	New Zealand/NZ	New Zealand/NZ
14	+5.7%	Saudi Arabia/SA	0	0	Saudi Arabia/SA	Saudi Arabia/SA
15	+12.7%	Kuwait/KW	+1	+3	Pakistan/PK	Pakistan/PK
16	+4.9%	Singapore/SG	+1	0	Kuwait/KW	Singapore/SG
17	-7.0%	Pakistan/PK	-2	-2	Singapore/SG	Malaysia/MY
18	+0.6%	Malaysia/MY	0	-1	Malaysia/MY	Kuwait/KW
19	+3.9%	Thailand/TH	+1	0	Argentina/AR	Thailand/TH
20	-11.6%	Argentina/AR	-1	0	Thailand/TH	Argentina/AR
21	+16.0%	Taiwan/TW	+2	+2	Mexico/MX	Mexico/MX
22	+7.9%	Qatar/QA	0	0	Qatar/QA	Qatar/QA
23	-8.9%	Mexico/MX	-2	-2	Taiwan/TW	Taiwan/TW
24	+11.7%	Indonesia/ID	0	+1	Indonesia/ID	Bahrain/BH
25	+6.4%	Kenya/KE	0	+1	Kenya/KE	Indonesia/ID
26	+6.7%	Bahrain/BH	0	-2	Bahrain/BH	Kenya/KE
27	+2.0%	Oman/OM	0	0	Oman/OM	Oman/OM
28	+13.7%	Philippines/PH	0	0	Philippines/PH	Philippines/PH
29	+6.3%	Ghana/GH	0	0	Ghana/GH	Ghana/GH
30	+32.5%	Bangladesh/BD	+4	+1	Chile/CL	Jordan/JO

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 Arrivals in the UK from outside Europe and Mediterranean countries.

When it comes to cities, the most notable risers during the past year are Abuja, Delhi, Miami, and Seattle, all of which have climbed four, or more, places up the ranking. The notable fallers are Dubai, Buenos Aires and Mexico City, which have all fallen three or more places. It is also notable that all the major Australian cities, except Melbourne, have suffered a decline in bookings.

Olivier Ponti, VP Insights, ForwardKeys, said: "There are some general principles that explain why origin markets become stronger or weaker, including performance of the local economy, currency fluctuations, airline competition and major events. However, if there is one trend in the data that I find particularly interesting; it is the rise of second tier cities and it is most marked in the two leading outbound travel markets, the USA, where sixteen cities feature in the top 50 list and China, where growth for the country exceeds the growth of its two biggest cities."


The city ranking is shown in the table below.

**Top 50 long-haul origin cities for the United Kingdom,
based on air arrivals, 2014-2019**

Ranking 2019	Growth vs 2018	City	Ranking Change vs 2018	Ranking Change vs 2014	Ranking 2018	Ranking 2014
1	+3.6%	New York City (US)/NYC	0	0	New York City (US)/NYC	New York City (US)/NYC
2	+7.4%	Hong Kong (HK)/HKG	0	0	Hong Kong (HK)/HKG	Hong Kong (HK)/HKG
3	-2.1%	Sydney (AU)/SYD	0	0	Sydney (AU)/SYD	Sydney (AU)/SYD
4	-0.4%	Seoul (KR)/SEL	0	+12	Seoul (KR)/SEL	Toronto (CA)/YTO
5	+4.3%	Los Angeles (US)/LAX	0	+3	Los Angeles (US)/LAX	Lagos (NG)/LOS
6	+1.3%	Melbourne (AU)/MEL	0	0	Melbourne (AU)/MEL	Melbourne (AU)/MEL
7	+21.1%	Delhi (IN)/DEL	+4	+8	Toronto (CA)/YTO	Tokyo (JP)/TYO
8	+2.5%	Toronto (CA)/YTO	-1	-4	Shanghai (CN)/SHA	Los Angeles (US)/LAX
9	+12.8%	Shanghai (CN)/SHA	-1	+9	Tokyo (JP)/TYO	Dubai (AE)/DXB
10	+11.9%	Tokyo (JP)/TYO	-1	-3	Washington (US)/WAS	Boston (US)/BOS
11	+7.3%	Washington (US)/WAS	-1	+1	Delhi (IN)/DEL	Beijing (CN)/BJS
12	+6.9%	Mumbai (IN)/BOM	0	+2	Mumbai (IN)/BOM	Washington (US)/WAS
13	+10.6%	San Francisco (US)/SFO	0	0	San Francisco (US)/SFO	San Francisco (US)/SFO
14	+18.1%	Chicago (US)/CHI	+2	+3	Dubai (AE)/DXB	Mumbai (IN)/BOM
15	+10.1%	Boston (US)/BOS	0	-5	Boston (US)/BOS	Delhi (IN)/DEL
16	+17.2%	Beijing (CN)/BJS	+2	-5	Chicago (US)/CHI	Seoul (KR)/SEL
17	+2.5%	Dubai (AE)/DXB	-3	-8	Brisbane (AU)/BNE	Chicago (US)/CHI
18	+11.4%	Lagos (NG)/LOS	+1	-13	Beijing (CN)/BJS	Shanghai (CN)/SHA
19	-4.1%	Brisbane (AU)/BNE	-2	+1	Lagos (NG)/LOS	Singapore (SG)/SIN
20	+12.7%	Kuwait (KW)/KWI	0	+3	Kuwait (KW)/KWI	Brisbane (AU)/BNE
21	+12.0%	Johannesburg (ZA)/JNB	+2	0	Perth (AU)/PER	Johannesburg (ZA)/JNB
22	+4.9%	Singapore (SG)/SIN	0	-3	Singapore (SG)/SIN	Sao Paulo (BR)/SAO
23	-4.5%	Perth (AU)/PER	-2	+1	Johannesburg (ZA)/JNB	Kuwait (KW)/KWI
24	+7.0%	Sao Paulo (BR)/SAO	+2	-2	Kuala Lumpur (MY)/KUL	Perth (AU)/PER
25	+0.5%	Kuala Lumpur (MY)/KUL	-1	0	Auckland (NZ)/AKL	Kuala Lumpur (MY)/KUL
26	-2.3%	Auckland (NZ)/AKL	-1	+4	Sao Paulo (BR)/SAO	Bangkok (TH)/BKK
27	+3.7%	Bangkok (TH)/BKK	0	-1	Bangkok (TH)/BKK	Houston (US)/HOU
28	+17.1%	Seattle (US)/SEA	+4	+10	Buenos Aires (AR)/BUE	Buenos Aires (AR)/BUE
29	+8.7%	Atlanta (US)/ATL	0	+6	Atlanta (US)/ATL	Vancouver (CA)/YVR
30	+9.7%	Houston (US)/HOU	0	-3	Houston (US)/HOU	Auckland (NZ)/AKL
31	-7.5%	Buenos Aires (AR)/BUE	-3	-3	Riyadh (SA)/RUH	Doha (QA)/DOH
32	+8.9%	Riyadh (SA)/RUH	-1	0	Seattle (US)/SEA	Riyadh (SA)/RUH
33	+7.9%	Doha (QA)/DOH	0	-2	Doha (QA)/DOH	Philadelphia (US)/PHL
34	+5.7%	Vancouver (CA)/YVR	0	-5	Vancouver (CA)/YVR	Mexico City (MX)/MEX
35	+22.8%	Dallas (US)/DFW	+1	+1	Taipei (TW)/TPE	Atlanta (US)/ATL
36	+15.3%	Taipei (TW)/TPE	-1	+1	Dallas (US)/DFW	Dallas (US)/DFW
37	+26.1%	Philadelphia (US)/PHL	+1	-4	Bangalore (IN)/BLR	Taipei (TW)/TPE
38	+18.1%	Bangalore (IN)/BLR	-1	+5	Philadelphia (US)/PHL	Seattle (US)/SEA
39	+20.9%	Miami (US)/MIA	+4	+8	Mexico City (MX)/MEX	Abuja (NG)/ABV
40	+8.7%	Cape Town (ZA)/CPT	0	0	Cape Town (ZA)/CPT	Cape Town (ZA)/CPT
41	+10.7%	Denver (US)/DEN	+1	+15	Adelaide (AU)/ADL	Osaka (JP)/OSA
42	+15.7%	Jakarta (ID)/JKT	+2	+8	Denver (US)/DEN	Montreal (CA)/YMQ
43	-10.7%	Mexico City (MX)/MEX	-4	-9	Miami (US)/MIA	Bangalore (IN)/BLR
44	-6.1%	Adelaide (AU)/ADL	-3	0	Jakarta (ID)/JKT	Adelaide (AU)/ADL
45	+9.2%	Montreal (CA)/YMQ	+2	-3	Orlando (US)/ORL	Lahore (PK)/LHE
46	+2.7%	Orlando (US)/ORL	-1	+18	Minneapolis (US)/MSP	Bahrain (BH)/BAH
47	+2.2%	Minneapolis (US)/MSP	-1	+8	Montreal (CA)/YMQ	Miami (US)/MIA
48	+21.2%	Abuja (NG)/ABV	+5	-9	Lahore (PK)/LHE	Rio De Janeiro (BR)/RIO
49	+6.7%	Nairobi (KE)/NBO	0	+3	Nairobi (KE)/NBO	Islamabad (PK)/ISB
50	+11.2%	Detroit (US)/DTT	+2	+7	Bahrain (BH)/BAH	Jakarta (ID)/JKT

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Claude Blanc, WTM Portfolio Director, said: "This is a fascinating study from ForwardKeys, revealing who is travelling long-haul to visit the UK and how the inbound market is changing over time. Whilst I am struck by the degree of growth from so many different parts of the world, I'm also intrigued to see it quantified by origin market as that kind of intelligence will help us focus our own business development efforts. These rankings will be useful to everyone who is in business promoting the UK."

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About ForwardKeys

ForwardKeys helps its clients measure and improve the effectiveness of their marketing & operations; anticipate the impact of events; and capitalise on future trends. Its data scientists do so by analysing an unparalleled amount of air travel information to produce valuable insights into the profile, behaviour and impact of past, present and future travellers. Sources include airline capacity plus over over 17m booking transactions and 7m flight searches per day. Customers are brands, retailers, duty-free specialists, financial institutions, media agencies and travel marketers worldwide.

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