

Understanding Business Visits to the UK

January 2024

VisitBritain Research



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Background and methodology

VisitBritain sponsors a number of questions each year on the International Passenger Survey, to gain a greater understanding of the UK's international visitors. This study is conducted at dozens of ports of exit from the UK (air, sea, and rail). In 2016, 2018, 2019, and 2022 VisitBritain asked a question to provide more information about visitors who came to the UK for Business:

While in the UK for business can you please tell me what best describes the main reason for visiting this time?

1. Meeting (1-5 people)
2. Meeting (6-20 people)
3. Meeting (21+ people)
4. Incentive/Team Building
5. Conference/Convention/Congress
6. Exhibition/Event/Trade Show
7. Training Event/Development
8. Other

This report focusses primarily on trends in Business visitors from 2022, with some comparison with previous years, and commentary regarding post-COVID recovery. You can read more reports on Business tourism in the UK on the [VisitBritain/VisitEngland website](#).

Please note the details overleaf regarding data included in this report from 2020, 2021, and 2022.

Four key insights – Business visitors

- **Business visitors bring value to the UK economy.** In 2022, Business visitors were the source of £5.0 billion spent in the UK, which was 19% of all spend by inbound visitors in that year. Despite Business visitors generally having shorter stays (5 nights vs. 8 nights among all purposes), in 2022 they spent more than double per night compared to the average visitor (£209 vs. £101). The value of these travellers has grown over time, with new records achieved for both spend per visit and spend per night achieved in 2022.
- **Post-COVID recovery is underway for Business visitors.** In 2020, Business visits declined by 81%, with spend declining by 83%. In 2022, recovery can be seen, with visits reaching 59% of 2019 levels, and spend reaching 86% of 2019 levels (76% spend recovery in real terms). Despite this, Business visits are one of the slower recovering journey purposes, alongside Study visits, so more time may be needed to see a full recovery. For comparison, among all journey purposes 2022 saw total visits reach 76% of pre-COVID levels, with spend at 93% (83% spend recovery in real terms).
- **Different types of Business visitors have unique characteristics.** In 2022, the most common type of Business traveller in the UK were Lorry drivers, however this group was only responsible for 4% of Business spend. The most valuable category was meetings of 6-20 people, contributing £1.1 billion to the UK economy in 2022. Each of the 8 individual groups demonstrate unique seasonality patterns, source markets, and trip characteristics.
- **Business spend remains focussed in London.** In 2022, 63% of Business spend was focussed in London, and in fact, 22% of all inbound spend that the city received in that year stemmed from this journey purpose. The next most prominent regions receiving spend from Business visitors were the South East (£402 million), and North West (£271 million). The North East and West Midlands saw the greatest share of their inbound spend coming from Business visitors, at 28% each in 2022.

Four key insights – MICE* visitors

- **A significant proportion of Business visitors fall within the MICE category.** In 2022, 22% of inbound Business travellers were MICE (1.1 million), and they were the source of 29% of Business spend (£1.5 billion). Each MICE traveller is also even more valuable on average than Business travellers overall; spending an average of £1,310 per visit (vs. £968 spent on average by Business travellers), and £285 per night (vs. £209).
- **MICE visits appear to be recovering faster than Business visits overall.** MICE visits recovered to 63% of 2019 levels in 2022, with spend recovering to 87% of 2019 levels (77% spend recovery in real terms). This level of recovery is slightly stronger compared to what can be seen for Business travellers overall (59% recovery for visits and 86% recovery for spend in nominal terms, 76% spend recovery in real terms). In the years that VisitBritain has asked about types of Business travellers, 2019 saw the highest visits and spend from MICE travellers.
- **The MICE category includes varied types of travellers.** The largest category of visitors within MICE in 2022 was ‘conferences, conventions, and congresses’, contributing 414,000 visitors, and spending £504 million during their stays. However, despite a lower volume of visitors, the ‘meetings (21+ attendees)’ category contributed slightly more spend at £507 million. The four categories within MICE all demonstrate different trip characteristics and value per traveller.
- **The US is the top source market, followed by key European markets.** In 2022, the US was the source of 166,000 MICE visitors, who spent £377 million during their stays. The next top ranked markets across visits and spend were France, Germany, and the Netherlands. Within the top 5 markets, Germany and the Netherlands were higher ranked for MICE visitation compared to overall inbound visits, with India** ranked 7 places higher for MICE spend compared to spend across all journey purposes.

*‘MICE’ stands for ‘Meetings, Incentives, Conferences & Exhibitions’. This category includes Meetings (21+ attendees), Incentives/Team building, Conferences/Conventions/Congresses, Exhibitions/Events/Trade shows. **Please treat with caution due to low sample size.

All values and percentage changes in spend are in nominal terms unless otherwise specified

Important notice for interpreting data

The International Passenger Survey (IPS) was suspended on 16 March 2020 due to the coronavirus (COVID-19) pandemic. Interviewing initially began at UK airports at the start of 2021, though the IPS remained suspended at some sea ports and train stations during the year. To produce statistics for the periods impacted the Office for National Statistics (ONS) have applied the following processes to the data since March 2020:

- **March 2020** - With the data collected for most of March when the IPS was running the ONS had part of the data needed for the month. To produce estimates for the full month of March the ONS worked on the assumption that passenger characteristics in the second, unsampled, half of the month were represented by those sampled in the first half.
- **April – December 2020 (Q2, Q3, Q4 2020)** - The travel and tourism figures for this period are based entirely on administrative sources and modelling as no data was collected during this period. In producing these results the ONS have made assumptions that some previous trends have continued, for example, the proportions of passengers travelling for business or holidays.
- **2021** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) in Q4 2021 due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for this quarter. Data for those travelling via Dover was only collected from Q3 2021. In addition, no estimates are included for any travel across the Irish border. Please see [our 2021 inbound data page](#) for more information.
- **January to June 2022** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) during this period due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for Q1-Q2 2022. The ONS restarted IPS interviews at all ports from July 2022. Please see our [2022 inbound page](#) for more information.

Please [refer to the ONS website for the official release and more information on IPS methodology and UK outbound travel](#)

Overview of Business visits to the UK



How many business visitors did the UK receive in 2022?

Of the 31.2 million inbound visits that the UK received in 2022, 5.1 million or 16% were taken by those with a Business purpose.



5.1 million business visitors came to the UK in 2022, constituting **16%** of all visitors



23.8 million nights were spent by business visitors in the UK in 2022, constituting **9%** of all nights



Business visitors spent **£5.0 billion** in the UK in 2022, constituting **19%** of all spend

What was their trip length and spend?

Business:

5
nights
per visit

£968
spend per
visit

£209
spend per
night

All journey
purposes:

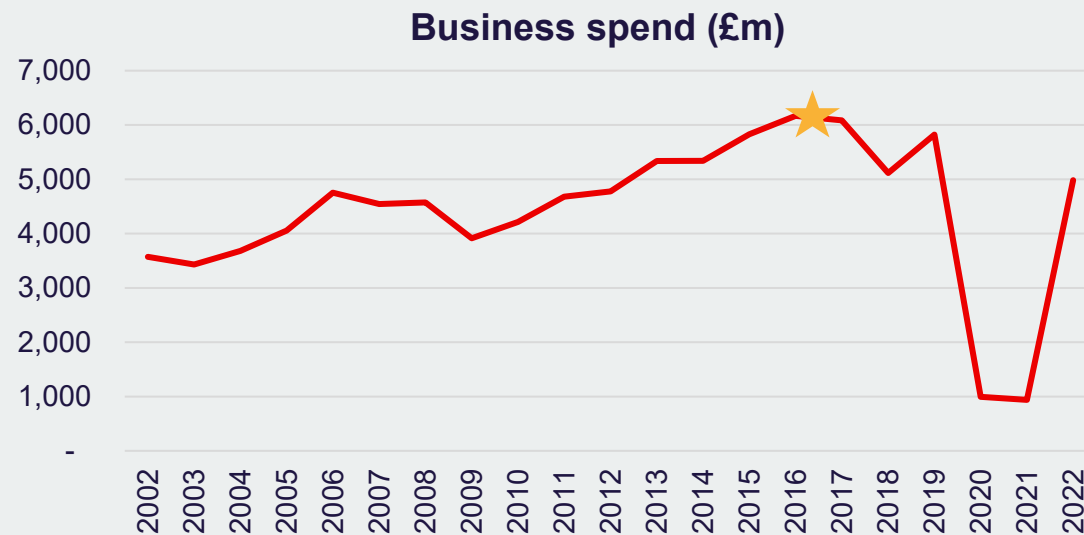
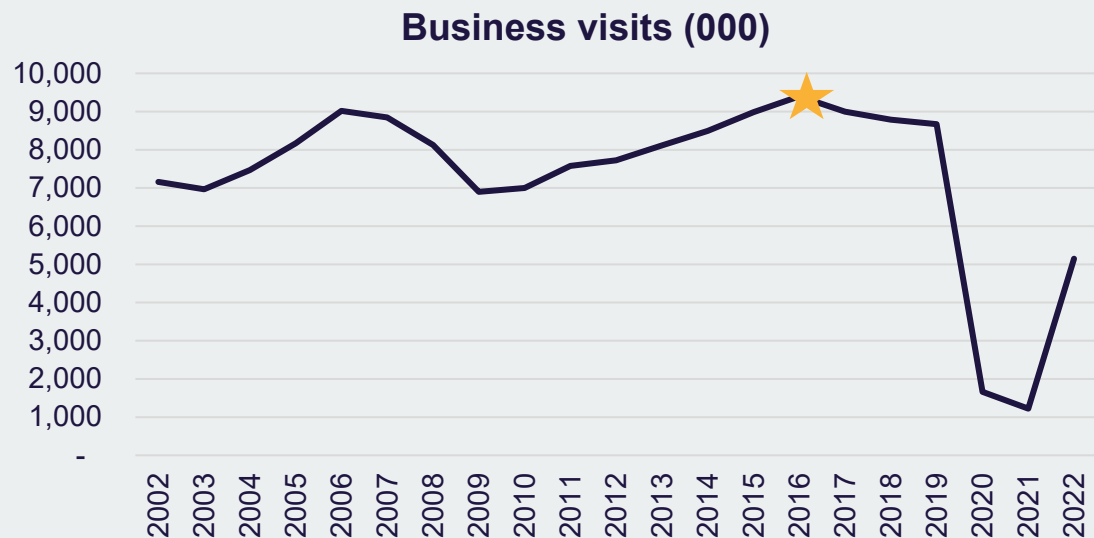
8 nights
per visit

£848
spend
per visit

£101
spend
per night

- Business visits tend to be shorter than an average visit; in 2022 Business visits lasted an average of 5 nights, compared to an average across all journey purposes of 8 nights.
- Despite comparatively shorter stays, the average Business visitor to the UK in 2022 spent £968 during their stay; 14% more compared to the £848 spent by visitors for all journey purposes. Additionally, Business visitors spend more than double than other travellers per night spent in the UK; £209 vs. £101.
- The value of these travellers has grown over time, with new records for both spend per visit and spend per night achieved in 2022. In fact, in that year average spend per visit was 44% higher than in 2019, and spend per night 30% higher.

What are the trends in Business visitation over time?



- The volume of Business visits and the spend associated with them has fluctuated since 2002, but both reached their peak in 2016, with 9.4m visits and £6.2bn spent. Post 2016, Business visits and spend generally reduced until 2019, after which a dramatic decline was seen due to the COVID-19 pandemic.
- In 2020, Business visits declined by 81%, and Business spend declined by 83%. However, a recovery can be seen, with visits recovering to 59% of 2019 levels in 2022 and spend recovering to 86% of the same (76% spend recovery in real terms). Despite this, Business visits are one of the slower recovering journey purposes, alongside Study visits. In comparison, Holiday visits recovered to 72% of 2019 levels in 2022, and Holiday spend recovered to 87% (77% spend recovery in real terms).

Source: International Passenger Survey ★ = record high. All values and percentage changes in spend are in nominal terms unless otherwise specified. Please see details on slide 4 regarding interpretation of 2020, 2021, and 2022 data.

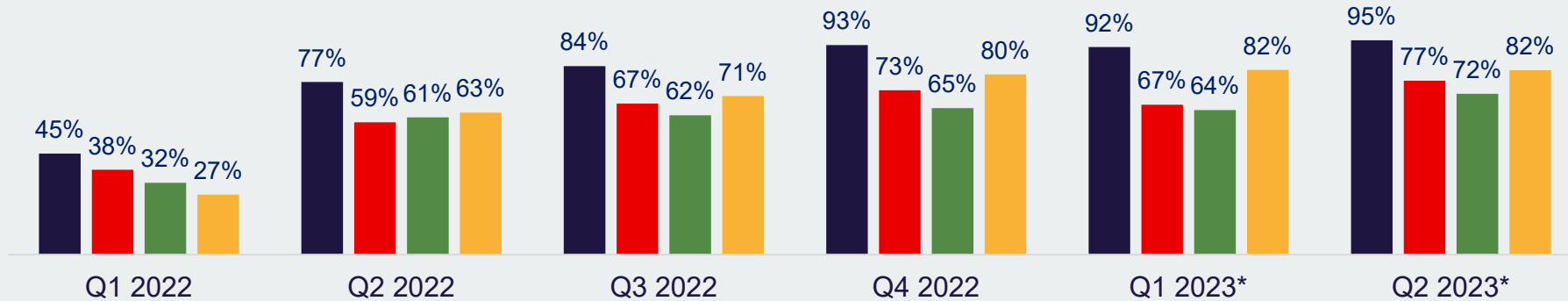
What type of Business visits is the UK receiving?

Business visit type	Visits (000)	Visits (% Share)	Nights (000)	Nights (% Share)	Spend (£m)	Spend (% Share)
Meeting 1-5 people	950	18%	3,183	13%	£934	19%
Meeting 6-20 people	895	17%	3,649	15%	£1,139	23%
TOTAL MICE*	1,112	22%	5,102	21%	£1,456	29%
• <i>Meeting 21+ people</i>	361	7%	1,628	7%	£507	10%
• <i>Incentive</i>	94	2%	490	2%	£139	3%
• <i>Conference</i>	414	8%	1,940	8%	£504	10%
• <i>Exhibition</i>	242	5%	1,043	4%	£305	6%
Training/Development	248	5%	2,620	11%	£423	8%
Lorry driving	1,352	26%	2,876	12%	£183	4%
Other	520	10%	5,660	24%	£745	15%
Don't know	73	1%	742	3%	£101	2%
All Business visits	5,149		23,832		£4,982	

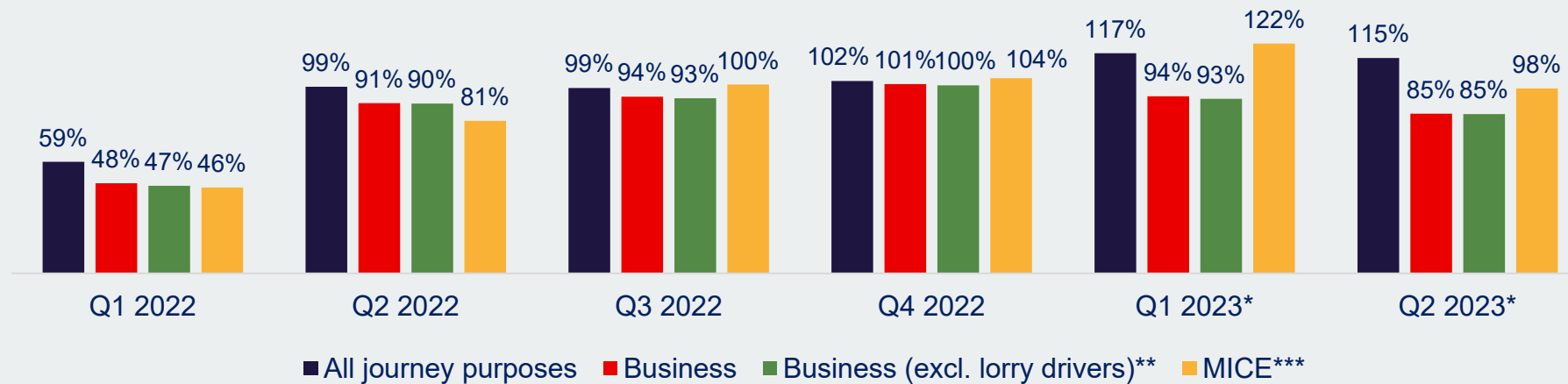
- In selected years since 2016, VisitBritain has included an added question on the IPS to identify types of Business travellers.
- The needs of different types of Business travellers can vary greatly, for example a small meeting could be held in an office meeting room, whereas a larger conference would require accommodation, catering, breakout space, transport, and out of hours entertainment.
- The most common individual Business visit type in 2022 was lorry driving, accounting for over a quarter of visits, but only 4% of spend.
- In contrast, meetings of 6-20 people accounted for the largest portion of inbound Business spend, at 23%.
- The combined MICE* category of Business visits (including meetings of 21+ people, incentive trips, conferences, and exhibitions) accounted for almost 30% of inbound Business spend in 2022.

How are different types of Business visits recovering?

Recovery of visits by quarter vs. 2019



Recovery of spend by quarter vs. 2019



- Post COVID, Business visits overall have been recovering at a slower pace vs. all journey purposes for both visits and spend.
- After a slower start to 2022, the recovery of MICE visits starts to overtake that of overall Business visits from Q2 2022. MICE spend recovery overtakes overall Business spend recovery a little later; from Q3 2022, also overtaking the recovery of spend from all journey purposes from Q3 2022 to Q1 2023.
- Recovery trends from Business visitors excluding lorry drivers tends to stay close to the pattern seen for Business visitors overall.

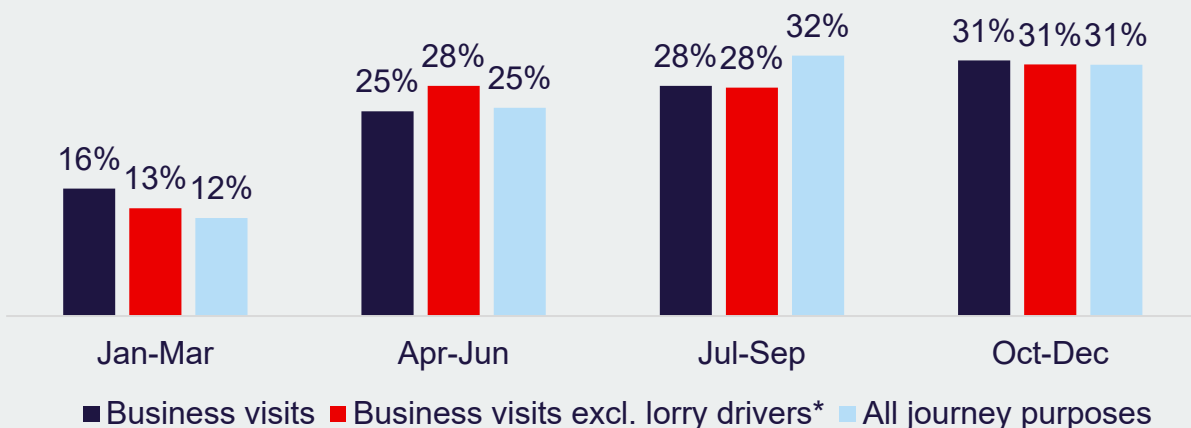
Source: International Passenger Survey 2022 *2023 data is provisional. **Data excluding lorry drivers has been included as this group often exhibits different behaviour vs. other types of business traveller. ***More detail on MICE visits available from slide 20. All values and percentage changes in spend are in nominal terms unless otherwise specified

Business visit characteristics

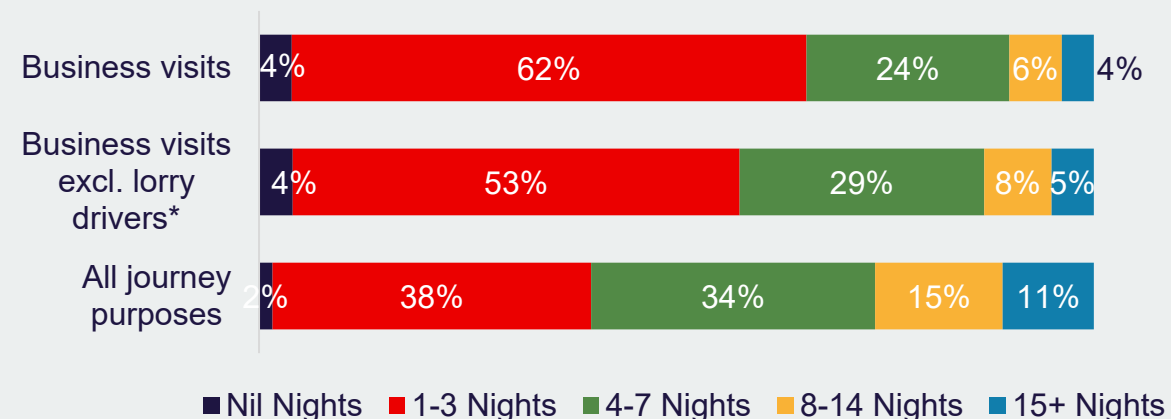


Seasonal spread and duration of stay

Seasonal spread of visits in 2022



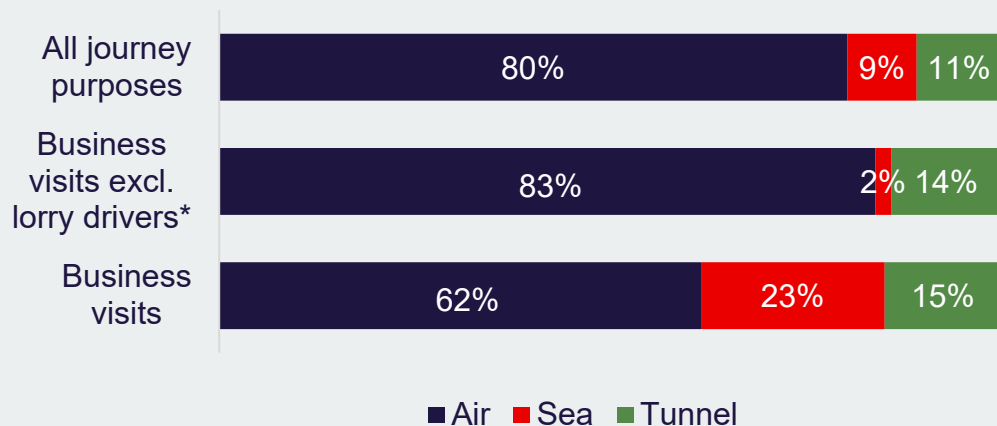
Duration of stay in 2022



- In 2022, Business visits demonstrated a slightly different pattern vs. the seasonality of overall inbound visits, with a larger share of visits being seen in the first quarter, and a smaller share during the summer months (a similar pattern can be seen when excluding lorry drivers). Worth noting is that 2022 was an unusual year, with the receding effects of COVID meaning that inbound visits were concentrated in later quarters. In 2019, Business travel was very evenly spread across quarters, providing a consistent opportunity for the UK tourism industry.
- As we have already seen, Business visits tend to be of a shorter duration compared to other purposes, and indeed in 2022, visits lasting for 3 nights or less accounted for two thirds of overall inbound Business travel. Business visitors were more likely than the average visitor to take a trip of 1-3 nights by a margin of 24 percentage points, and under-indexed in the longer stay brackets. Business visits tended to be longer in 2022 than pre-COVID in 2019.

How do Business visitors travel to the UK?

Mode of travel in 2022

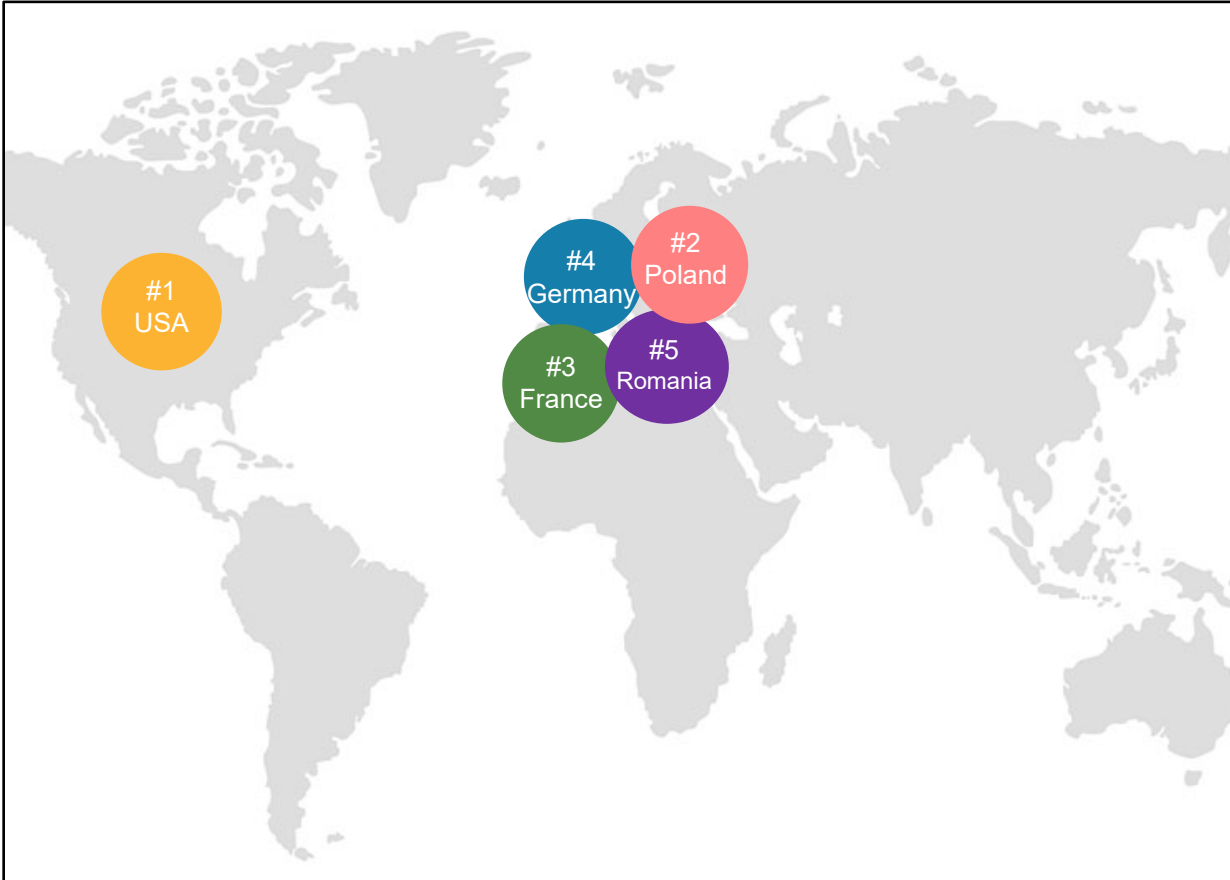


Modes of travel within 'tunnel' in 2022

Tunnel transport type	All visits (000s)	All visits (% share)	Business visits (000s)	Business visits (% share)	Business visits excl. lorry drivers (000s)	Business visits excl. lorry drivers (% share)
Eurostar	2,873	85%	516	67%	516	94%
Other vehicles incl. driving***	299	9%	33	4%	33	6%
Freight**	220	7%	221	29%	N/A	N/A

- 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 62% arriving in the UK via air in 2022. However, a higher proportion of Business visitors arrived through a sea-port than for other journey purposes; 23% vs 9% for all journey purposes in 2022. This was up from a proportionate share of 20% of business visits travelling via sea-ports in 2019.
- Arrivals through the tunnel in 2022 were a little higher for Business visits compared to all journey purposes (15% and 11% respectively). There was a slight increase in Business arrivals via the tunnel up from 13% in 2019. The majority of Business travellers via the tunnel travelled with Eurostar.
- When excluding lorry drivers, we see that the remaining types of Business travellers are more likely to use similar modes of transport to the average for all journey purposes, however ‘sea’ is a much less popular option for this group compared to the average inbound traveller.

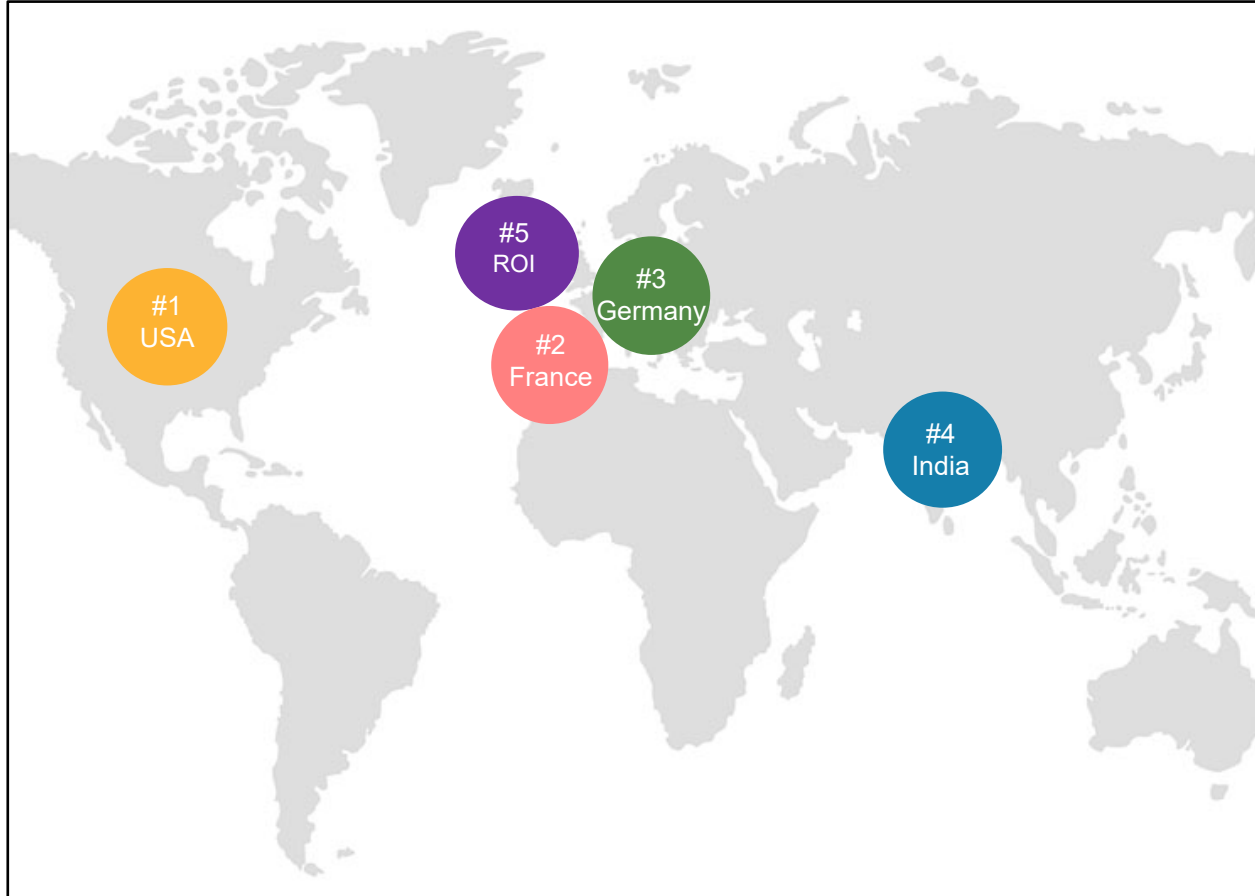
Top source markets for Business visits



Business Rank	All Purposes Rank*	Market	Visits in 2022 (000)	Ranking for Business excl. lorry drivers***
1	1	USA	581	USA
2	7	Poland	521	Germany
3	2	France	500	France
4	4	Germany	381	Irish Republic
5**	13	Romania	322	Netherlands
6	3	Irish Republic	302	Italy
7	6	Netherlands	281	Spain
8	5	Spain	242	Belgium
9	8	Italy	205	Switzerland
10**	12	Belgium	146	India

Top 10 ranked markets for Business visits in 2022 varied significantly compared to the rankings for overall inbound visits, with Romania and Poland gaining 8 and 5 ranks respectively. Worth noting is that Lorry driving visits made up the majority share of Business visits from those markets (92% for Romania and 85% for Poland).

Top source markets for Business spend



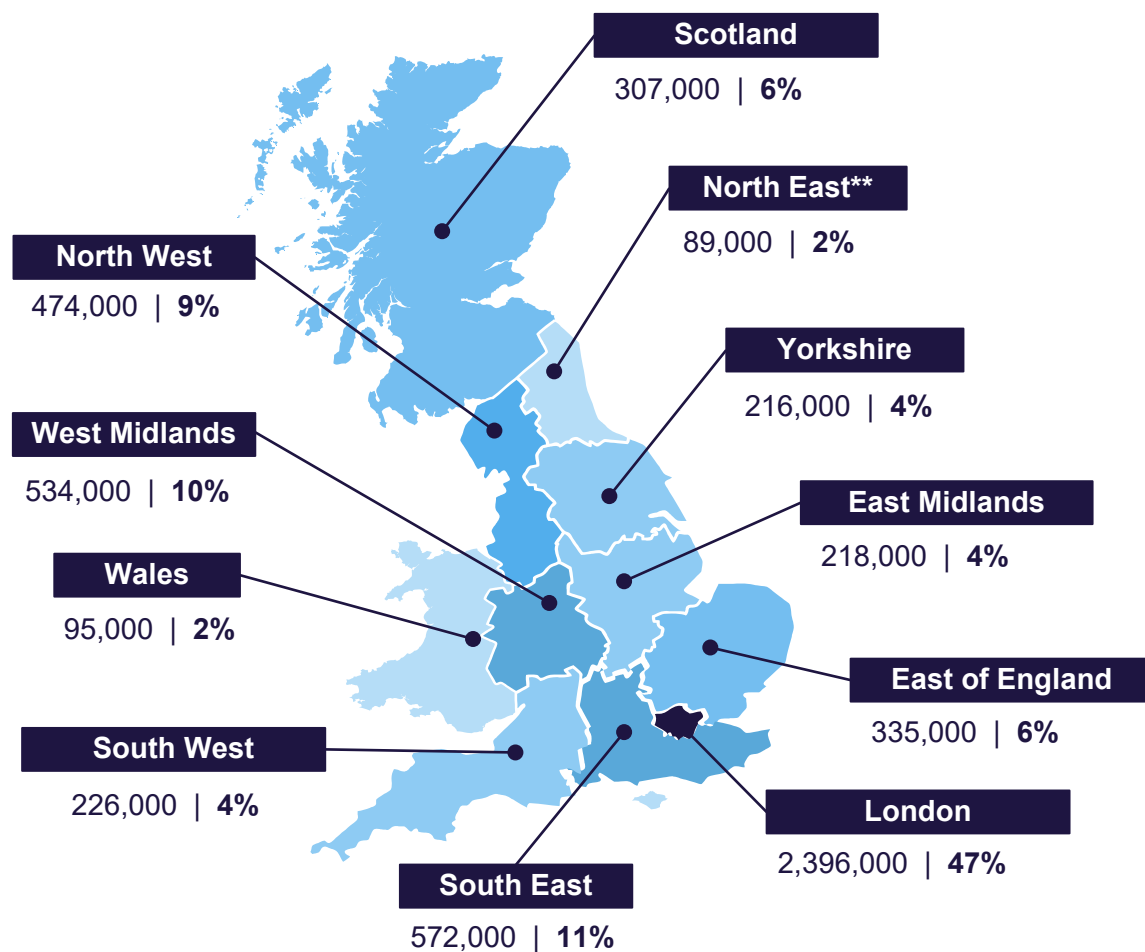
Business Rank	All Purposes Rank*	Market	Spend in 2022	Ranking for Business excl. lorry drivers**
1	1	USA	£1,205m	USA
2	2	France	£348m	Germany
3	3	Germany	£309m	France
4	11	India	£241m	Irish Republic
5	6	Irish Republic	£211m	India
6	8	Netherlands	£186m	Netherlands
7	9	Italy	£170m	Switzerland
8	4	Australia	£170m	Italy
9	5	Spain	£163m	China
10	7	Canada	£137m	Spain

Patterns in ranking differ once again when looking at inbound spend, with India gaining 7 ranks among Business visitors compared to overall inbound visitors in 2022. Australia and Spain both lose 4 ranks, and Canada 3 ranks when focussing on this audience.

Source: International Passenger Survey, ONS. *Market ranking among all inbound visitors in 2022. All values and percentage changes in spend are in nominal terms unless otherwise specified **Data excluding lorry drivers has been included as this group often exhibits different behaviour vs. other types of business traveller

Business visits across the UK

Business visits by nation and region (2022)*



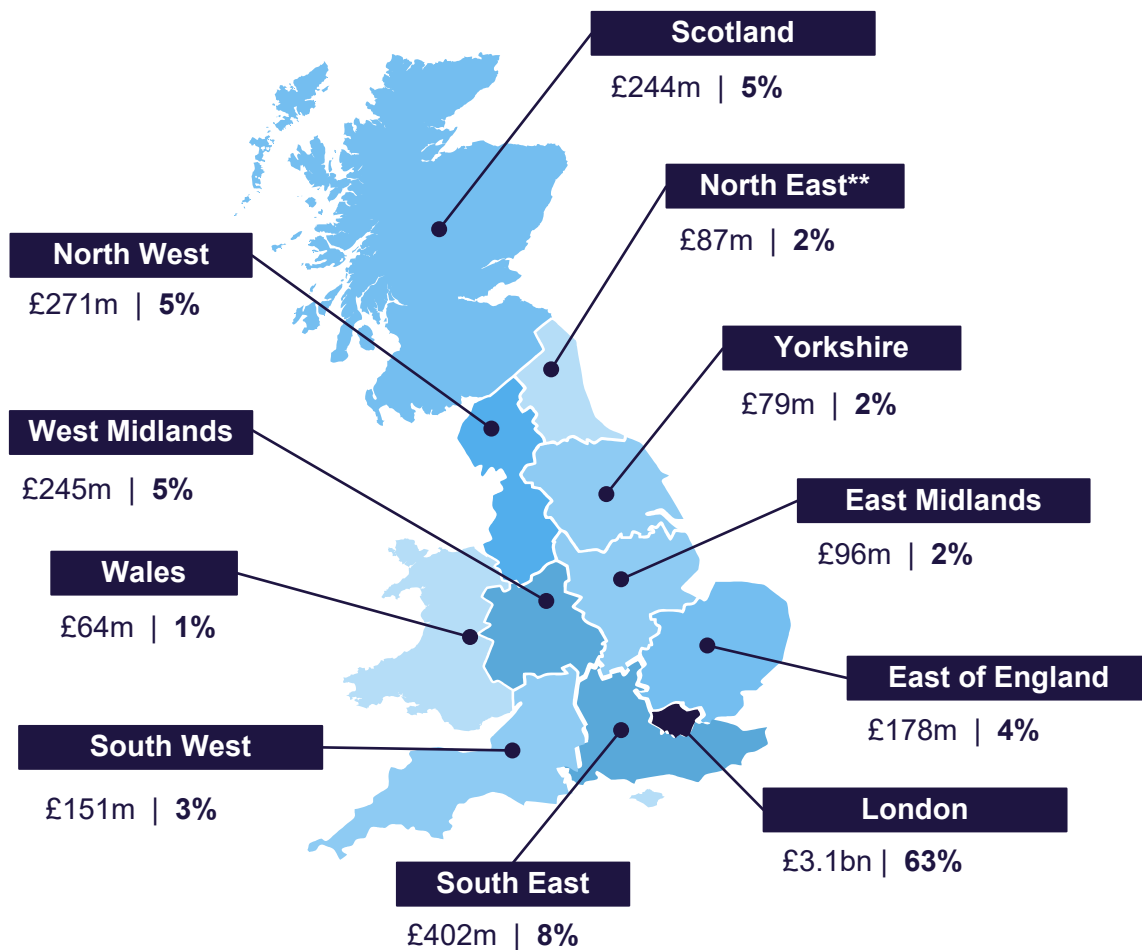
Region	Visits (000)	Business visits share in UK	Visits share in UK excl. lorry drivers***	Business visits as a % share of all visits
London	2,396	47%	60%	15%
South East	572	11%	8%	16%
West Midlands	534	10%	6%	32%
North West	474	9%	6%	18%
East of England	335	6%	4%	16%
Scotland	307	6%	6%	10%
South West	226	4%	3%	11%
East Midlands	218	4%	2%**	23%
Yorkshire	216	4%	2%**	20%
Wales	95	2%	1%**	14%
North East	89**	2%**	2%**	19%**

London received almost half of all UK Business visits in 2022; a total of 2.4 million. The next most popular regions for these travellers were the South East (11% of Business visits) and the West Midlands (10%). Looking at the overall spread of traveller types for each region, we see that the West Midlands was most reliant on Business visits, with this purpose accounting for 32% of their total visits in 2022.

Source: International Passenger Survey, ONS 2022. *Percentages show each destination's share of Business visitors within the UK **Sample size below 100, please treat with caution ***Data excluding lorry drivers has been included as this group often exhibits different behaviour vs. other types of business traveller

Business spend across the UK

Business spend by nation and region (2022)*



Region	Spend (£m)	Spend share in UK	Spend share in UK excl. lorry drivers***	Business spend as a % share of all spend
London	3,131	63%	68%	22%
South East	402	8%	7%	18%
North West	271	5%	5%	16%
West Midlands	245	5%	4%	28%
Scotland	244	5%	5%	8%
East of England	178	4%	3%	17%
South West	151	3%	2%	12%
East Midlands	96	2%	2%**	19%
North East	87**	2%**	2%**	28%**
Yorkshire	79	2%	1%**	15%
Wales	64	1%	1%**	16%

Looking at spend from Business travellers, this was even more focussed in London compared to visits in 2022 (63% of all Business spend vs. 47% of all Business visits). We also see different regions in the top three ranks: London, the South East, and North West. The West Midlands was one of the regions which was most reliant on Business spend compared to other journey purposes, alongside the North East (this purpose accounted for 28% of all inbound spend for both).

Source: International Passenger Survey, ONS 2022. *Percentages show each destination's share of Business visitors within the UK **Sample size below 100, please treat with caution. *** Data excluding lorry drivers has been included as this group often exhibits different behaviour vs. other types of business traveller. All values and percentage changes in spend are in nominal terms unless otherwise specified.

Spotlight on MICE



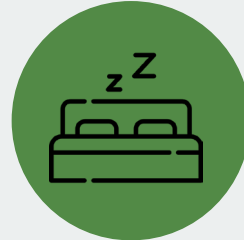
How many MICE visitors did the UK receive in 2022?

In selected years since 2016, VisitBritain has included an added question on the IPS to identify types of Business travellers. Within the categories included, the MICE category includes Business travellers for:

- Meetings (21+ attendees)
- Incentives/Team building
- Conferences/Conventions/Congresses
- Exhibitions/Events/Trade shows



1.1 million MICE visitors came to the UK in 2022, constituting **22%** of Business visitors, and **4%** of all visitors



5.1 million nights were spent by MICE visitors in the UK in 2022, constituting **21%** of Business nights, and **2%** of all nights



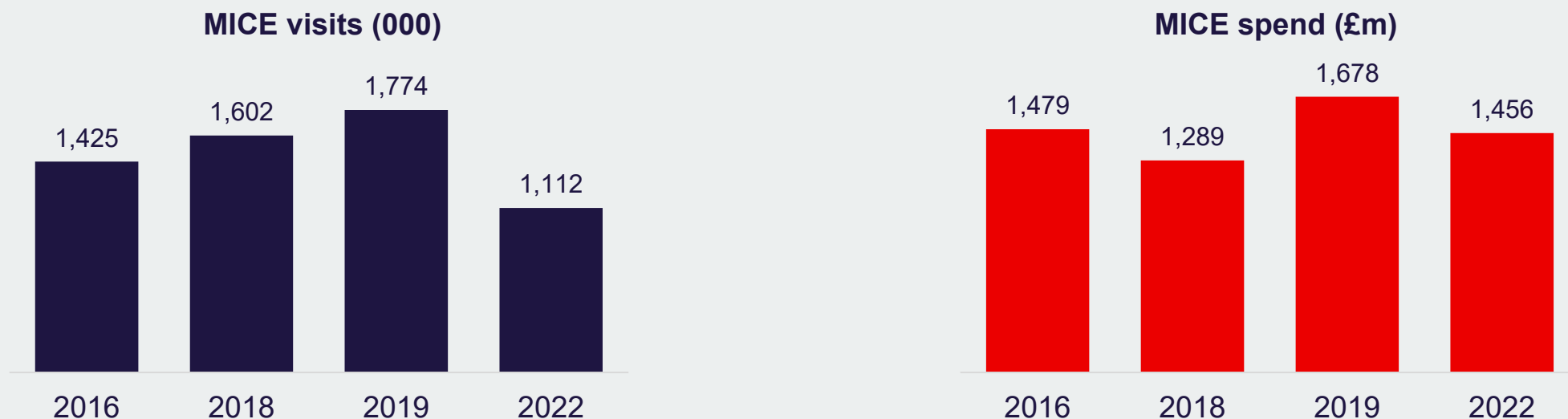
MICE visitors spent **£1.5 billion** in the UK in 2022, constituting **29%** of Business spend, and **5%** of all spend

What was their trip length and spend?



- MICE travellers are similar to Business travellers overall when it comes to length of stay; staying for an average duration of 5 nights in 2022, which is significantly shorter than the average across all trip purposes of 8 nights.
- Despite comparatively shorter stays, the average MICE visitor to the UK in 2022 spent £1,310 during their stay, which was 54% higher than the average for all journey purposes. It was also significantly higher than the Business average in that year of £968.
- Average spend per visit for MICE visitors was almost triple that of the average visitor, and also higher at £285 than Business travellers overall (£209).
- Compared to 2019, MICE visitors' average length of stay was slightly longer (5 nights vs. 4 nights), spend per visit was 39% higher (£1,310 vs. £946), and spend per night was 30% higher (£285 vs. £220).

What are the trends in MICE visitation over time?



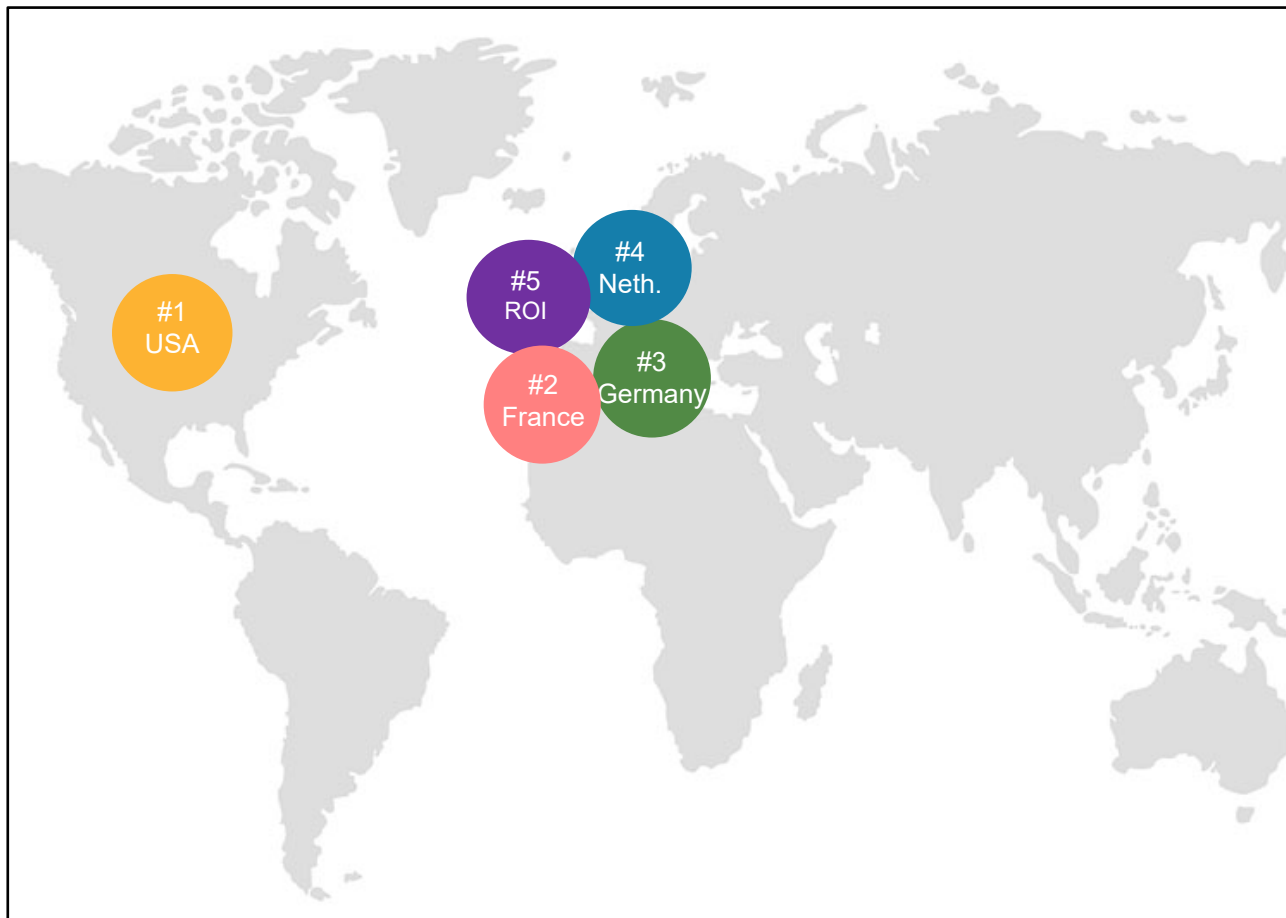
- In the years that VisitBritain has included an added question on the IPS to identify types of Business travellers, the volume of MICE visits and the spend associated with them has fluctuated. However, both reached their peak in 2019, with 1.8m visitors, and £1.7bn spent.
- Post 2019, and attributable to the COVID-19 pandemic, declines in MICE visitation and spend can be seen. In 2022, MICE visits recovered to 63% of 2019 levels, and MICE spend recovered to 87% of 2019 levels (77% spend recovery in real terms). This level of recovery was slightly stronger compared to what could be seen for Business travellers overall (59% recovery for visits and 86% recovery for spend in nominal terms, 76% spend recovery in real terms). For comparison, among all journey purposes 2022 saw total visits reach 76% of pre-COVID levels, with spend at 93% (83% spend recovery in real terms).

Share and characteristics of types of MICE visitors

Visit type	Visits (000s)	Visits (% within MICE)	Nights (000s)	Nights (% within MICE)	Spend (£m)	Spend (% within MICE)	Average nights per visit	Average spend per visit (£)	Average spend per night (£)
Meeting (21+ people)	361	33%	1,628	32%	507	35%	4.5	1,403	311
Incentive/Team Building	94	8%	490	10%	139	10%	5.2	1,483	284
Conference/ Convention/ Congress	414	37%	1,940	38%	504	35%	4.7	1,219	260
Exhibition/Event/Trade Show	242	22%	1,043	20%	305	21%	4.3	1,260	293

In 2022, the largest category of visitors within MICE was ‘conferences, conventions and congresses’, contributing 414,000 visitors, who spent £504 million during their stays. However, despite a lower volume of visitors, the ‘meetings (21+ attendees)’ category contributed slightly more spend at £507 million. With both types of traveller exhibiting a similar length of stay, meeting attendees spent on average more per night compared to conference attendees, at £311 compared to £260.

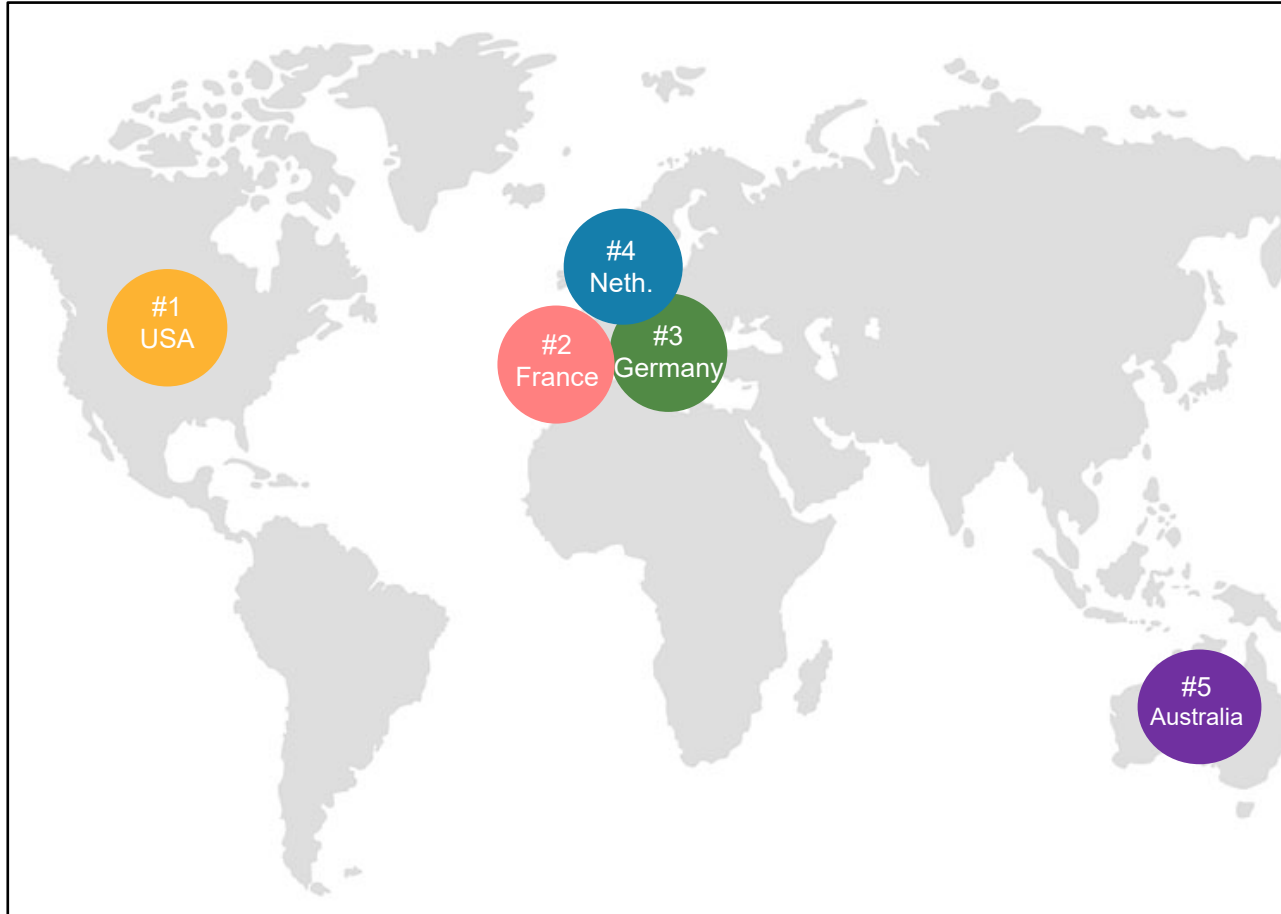
Top source markets for MICE visits



MICE Rank	All Purposes Rank***	Market	Visits in 2022 (000)
1	1	USA	166
2	2	France	117
3	4	Germany	104
4	6	Netherlands	77
5	3	Irish Republic	76
6	8	Italy*	57
7	5	Spain*	53
8	12	Belgium*	48
9	10	Switzerland*	39
10	16	Norway*	30

The top source markets for MICE visits in 2022 were the USA, France, and Germany. Within the top 5, Germany and the Netherlands were higher ranked for MICE visitation compared to overall inbound visits, however the Irish Republic dropped two ranks when focussing on MICE travellers.

Top source markets for MICE spend



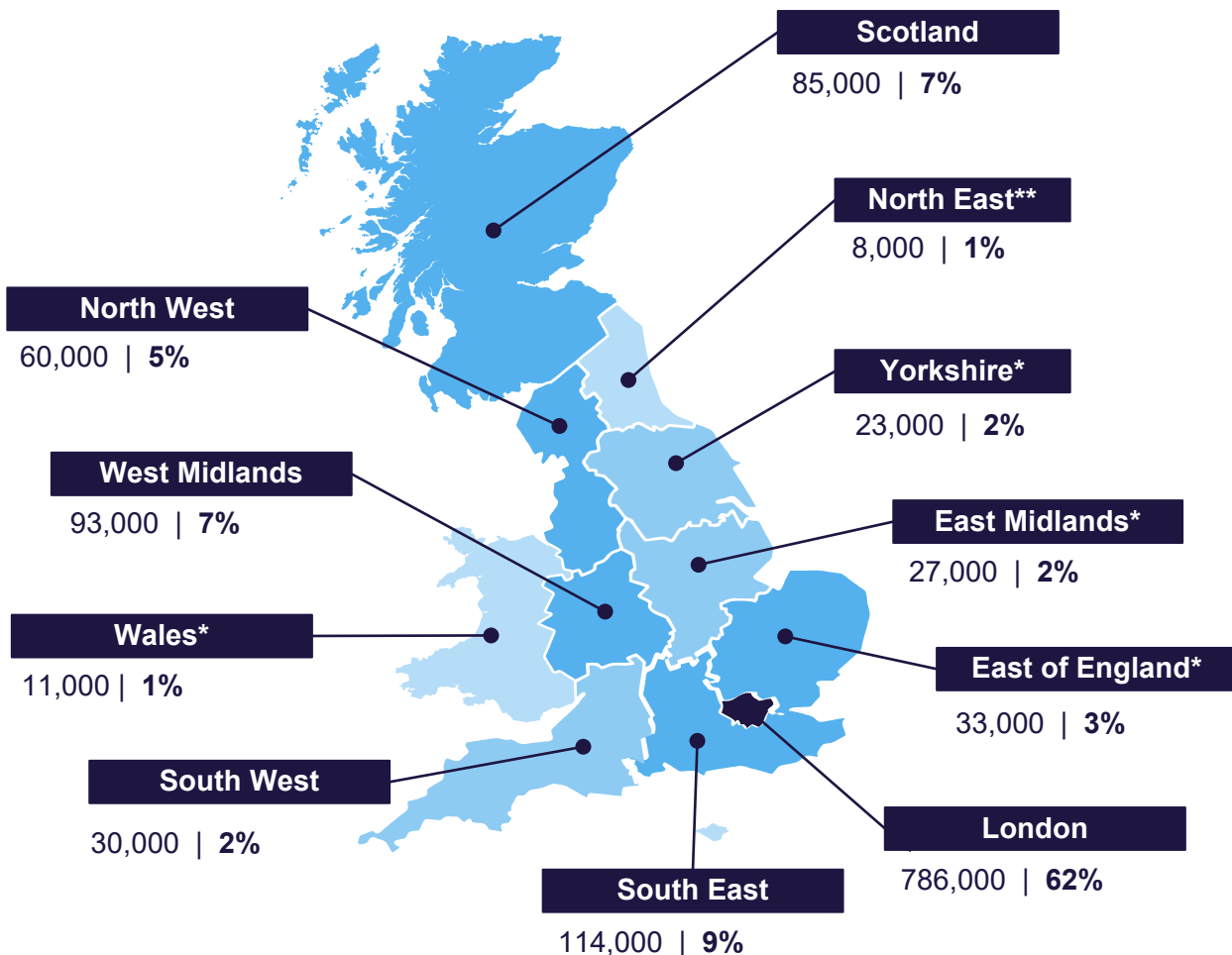
MICE Rank	All Purposes Rank***	Market	Spend in 2022
1	1	USA	£377m
2	2	France	£100m
3	3	Germany	£98m
4	8	Netherlands	£67m
5*	4	Australia	£62m
6	6	Irish Republic	£61m
7*	9	Italy	£49m
8*	13	Switzerland	£46m
9*	11	Indi	£45m
10**	19	Singapore	£45m

The top five source markets for MICE spend were similar in 2022 to those for visits, with the exception of Australia replacing the Irish Republic in 5th (please treat with caution due to sample size). Within the top 5, the Netherlands was ranked 4 places higher among MICE visitors compared to overall inbound visitation, whereas Australia was placed 1 rank lower when focussing on this audience.

Source: International Passenger Survey, ONS *Sample size below 100, please treat with caution. **Sample size below 30, may be misleading ***Market ranking among all inbound visitors in 2022. All values and percentage changes in spend are in nominal terms unless otherwise specified

MICE visits across the UK

Average MICE visits by nation and region (2018, 2019, 2022)***



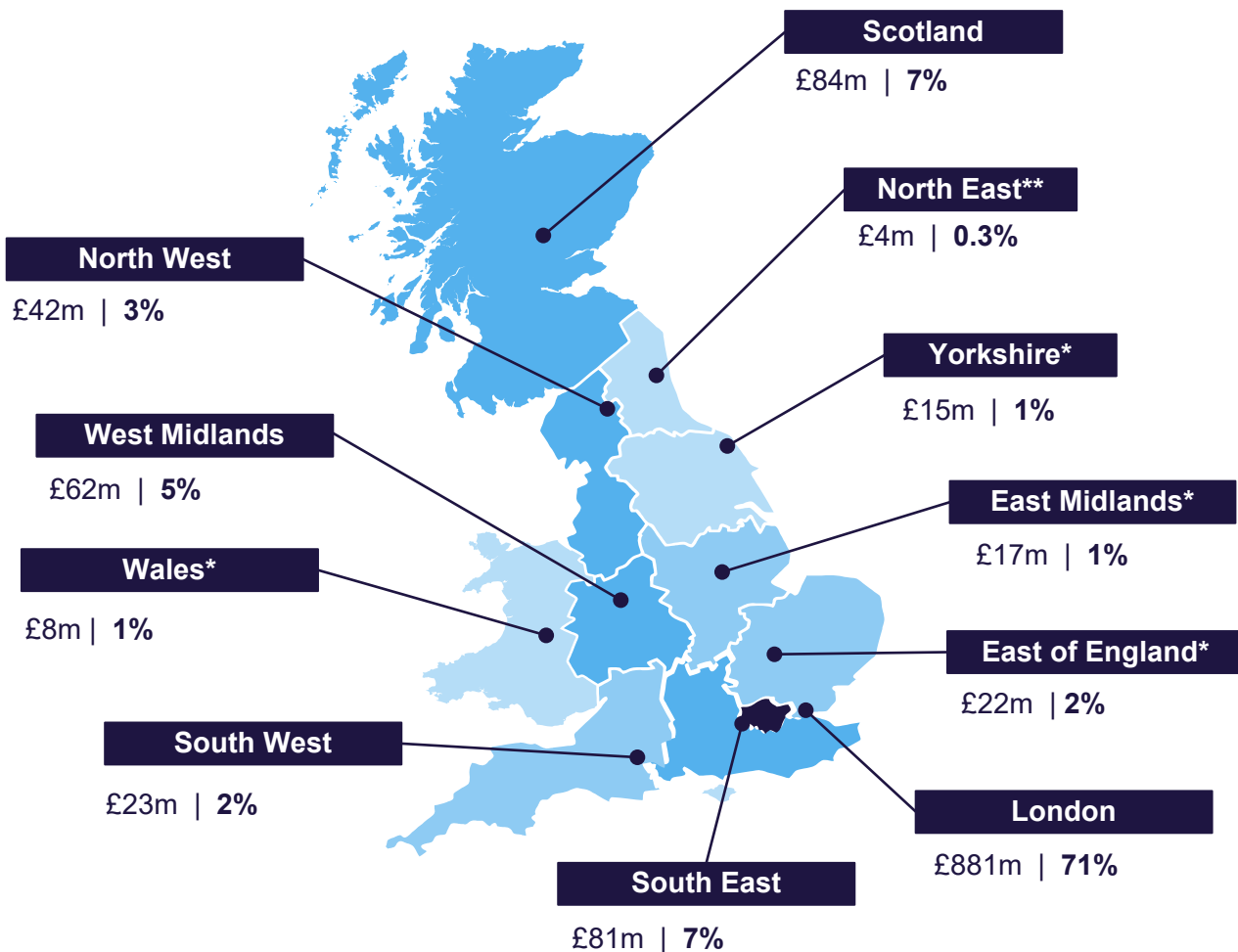
Region	Visits (000)	Visits share in UK	MICE visits as a % share of all visits
London	786	62%	4%
South East	114	9%	2%
West Midlands	93	7%	4%
North West	60	5%	2%
East of England*	33	3%	1%
Scotland	85	7%	2%
South West	30	2%	1%
East Midlands*	27	2%	2%
Yorkshire*	23	2%	2%
Wales*	11	1%	1%
North East**	8	1%	2%

London received 62% of all MICE visits across years; a total of 786,000. The next most popular regions for these travellers were the South East (9% of MICE visits), the West Midlands and Scotland (7% each). Looking at the overall spread of traveller types for each region, we see that London and the West Midlands were most reliant on Business visits, constituting 4% of their total visits respectively across 2018, 2019, and 2022.

Source: International Passenger Survey. *Sample size below 100, please treat with caution **Sample size below 30, may be misleading ***In order to maximise sample size, visits shown are an average per year across the three most recent years of data. Data shows those who stayed in one region while in the UK.

MICE spend across the UK

Average MICE spend by nation and region (2018, 2019, 2022)***



Region	Spend (£m)	Spend share in UK	MICE spend as a % share of all spend
London	881	71%	6%
South East	81	7%	3%
West Midlands	62	5%	6%
North West	42	3%	3%
East of England*	22	2%	2%
Scotland	84	7%	3%
South West	23	2%	2%
East Midlands*	17	1%	3%
Yorkshire*	15	1%	3%
Wales*	8	1%	2%
North East**	4	0.3%	1%

Looking at spend from MICE travellers, this was even more focussed in London compared to visits (71% of all MICE spend vs. 62% of all MICE visits). However, top ranked regions are slightly different, with the South East and Scotland following London. Looking at the overall spread of traveller types for each region, we see that London and the West Midlands was most reliant on MICE spend, constituting 6% of their total spend respectively in 2018, 2019, and 2022.

Source: International Passenger Survey. *Sample size below 100, please treat with caution **Sample size below 30, may be misleading ***In order to maximise sample size, visits shown are an average per year across the three most recent years of data. Data shows those who stayed in one region while in the UK. All values and percentage changes in spend are in nominal terms unless otherwise specified

Appendix

More detail on the characteristics of each type of Business visitor



Meetings of 1-5 people - 2022

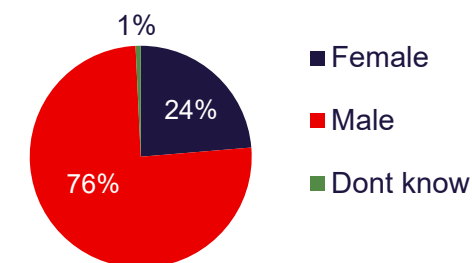
- Small meetings were the largest meeting category, accounting for 18% of Business visits (950,000 visits) in 2022.
- Visitors in the UK for a small meeting spent £934 million in 2022 – 19% of all inbound visitor spending under Business purposes.
- In terms of visits, the top 5 markets contributed to 53% of the visits; and the top 5 by value accounted for 52% of the spend in this category. Though the USA contributed 25% on its own.
- The seasonality in the spend from small meetings was weighted towards the second half of the year with October to December the most popular (Q4) in 2022.
- Just under a quarter of those in the UK on business to attend a small meeting in 2022 were female (24%).

Seasonality by Visits



Top 5 Markets by Volume	Visits (000)	Top 5 Markets by Value	Visits (£m)
USA	141	USA	238
France	138	France	79
Germany	89	India	57
Irish Republic	77	Irish Republic	56
Netherlands	61	Germany	53

Averages	2022
Average Spend per Visit	£983
Average Nights per Visit	3.3
Average Spend per Night	£294



Meetings of 6-20 people - 2022

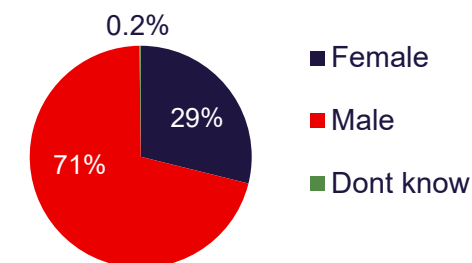
- Medium sized meetings represented 17% of Business visits in 2022, accounting for 895,000 visits.
- Visitors attending these meetings spent £1.1 billion in 2022, making medium business meetings the most valuable Business category with also the highest spend per night of all Business visit types at £312 per night.
- The top 5 markets by volume contributed over half of all these type of visits (55%), and over half (57%) of spend in this category. Similar to what was seen in the small meeting type, the USA contributed the lions share here – accounting for 33% of all spend.
- 31% of medium sized meetings were in the second quarter (April – June).
- The majority of those in the UK on business to attend a medium sized meeting in 2022 were male – though females did make up nearly 3 in 10 visits (29%).

Seasonality by Visits



Top 5 Markets by Volume	Visits (000)	Top 5 Markets by Value	Visits (£m)
USA	178	USA	380
France	97	India	109
Germany	87	France	57
Irish Republic	72	Germany	57
Netherlands	56	Irish Republic	44

Averages	2022
Average Spend per Visit	£1,273
Average Nights per Visit	4.1
Average Spend per Night	£312



Meetings of 21+ people - 2022

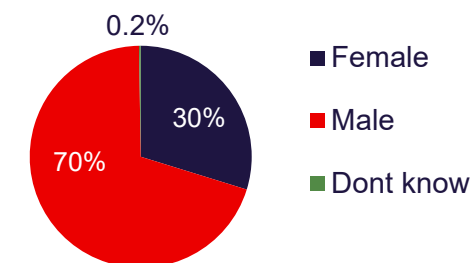
- Large meetings accounted for 7% of business visits in 2022 with 361,000 visits. Visitors attending these large meetings spent a total of £507 million in 2022.
- The top 5 markets by volume contributed over half of all these type of visits (54%), and over half (57%) of spend in this category. Of note is that visitors from the USA spend over three times more than second placed, Germany.
- 35% of large meetings were held during the last quarter of 2022 (October – December).
- 4 of the top 5 volume and value generating markets were visiting from Europe.
- 30% of large meeting attendees were female in 2022.

Seasonality by Visits



Top 5 Markets by Volume	Visits (000)	Top 5 Markets by Value	Visits (£m)
USA	69	USA	158
Germany	45	Germany	52
France	38	France	39
Irish Republic	23	Irish Republic	26
Netherlands	22	Switzerland	16

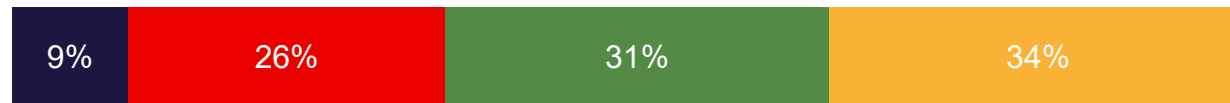
Averages	2022
Average Spend per Visit	£1,403
Average Nights per Visit	4.5
Average Spend per Night	£311



Incentive and team building - 2022

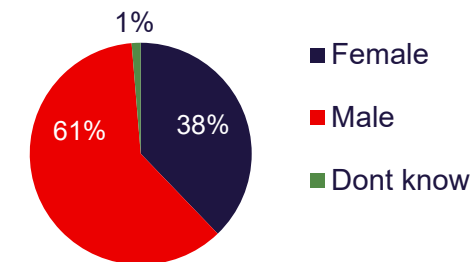
- Incentive and team building was the smallest business group in 2022 – in terms of visits and spend.
- 34% of the incentive visits in 2022 were during October to December. Q4 is traditionally considered a shoulder season to the main tourist season and although niche, these visits do help spread the UK tourism throughout the year.
- 38% of the team building and incentive visits were made by females and the majority (73%) of all visitors were between the ages of 25 and 44 years of age in 2022.
- With each visit averaging over £1,400, this group displayed one of the highest average spend per visits of the categories.
- Those on a team building or an incentive trip stayed an average of 5.2 nights.

Seasonality by Visits



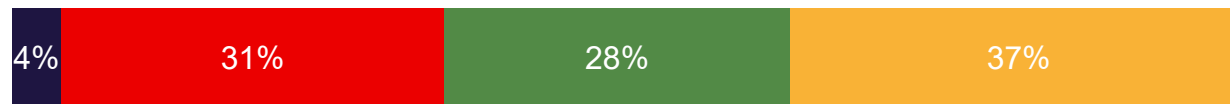
Top 5 Markets by Volume	Visits (000)	Top 5 Markets by Value	Visits (£m)
USA	16	USA	33
France	10	Canada	18
Irish Republic	7	Irish Republic	8
Spain	7	France	8
Belgium	6	Switzerland	7

Averages	2022
Average Spend per Visit	£1,483
Average Nights per Visit	5.2
Average Spend per Night	£284



Conferences, Conventions and Congresses - 2022

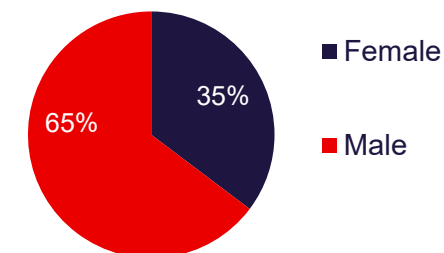
Seasonality by Visits



- There were 414,000 visits for conferences in 2022, with those visitors spending £504 million.
- The top 5 markets by volume contributed 43% of visits and 50% of spend for this Business category.
- As seen in the previous business categories, the value of the USA leads by some distance – at £119 million this is 24% of the total spend in this category.
- The first quarter (January – March) is the quietest quarter for attending conferences in the UK, whilst October-December was the most popular season for this type of visit (37% of visits).
- 35% of visitors in the UK in 2022 to attend a conference were female.

Top 5 Markets by Volume	Visits (000)	Top 5 Markets by Value	Visits (£m)
USA	54	USA	119
France	38	Australia	37
Germany	37	Netherlands	36
Netherlands	28	Germany	30
Irish Republic	24	France	28

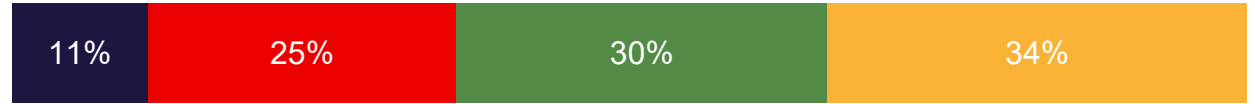
Averages	2022
Average Spend per Visit	£1,219
Average Nights per Visit	4.7
Average Spend per Night	£260



Exhibitions, events and trade shows - 2022

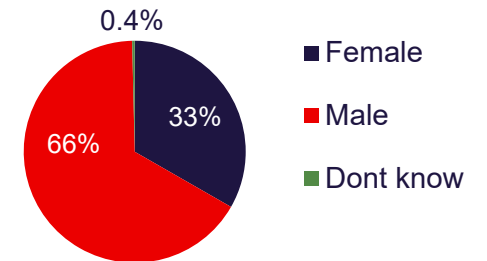
- Attendees to exhibitions, events or trade shows spent £305 million across 242,000 visits in 2022. In terms of the entire Business sector, this represented 5% of all visits and 6% of spend in 2022.
- The majority (64%) of exhibitions and trade shows were held in the second half of 2022, with about a third of such visits taking place between October and December. So, although a traditionally smaller category of business tourism these types of visitors can help extend the traditionally peak tourism 'summer' quarter.
- A third of the exhibitions, events and trade show visits were made by females and the majority (58%) of all visitors were between the ages of 35 and 54 years of age in 2022.

Seasonality by Visits



Top 5 Markets by Volume	Visits (000)	Top 5 Markets by Value	Visits (£m)
France	32	USA	67
USA	27	Singapore	25
Irish Republic	23	France	25
Netherlands	20	China	19
Germany	18	Italy	16

Averages	2022
Average Spend per Visit	£1,260
Average Nights per Visit	4.3
Average Spend per Night	£293



Training events and development - 2022

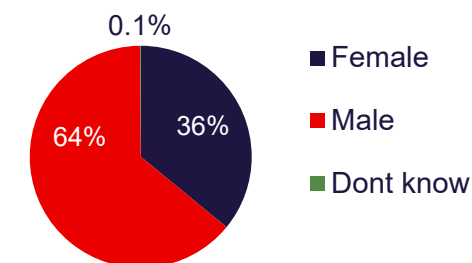
- Training and development includes visitors both receiving training and those who were in the UK to host a training session.
- This Business category contributed 248,000 visits and visitors attending these events spent £423 million in 2022.
- The majority (62%) of training and development events were held in the second half of 2022, with an equal proportion of visits across Q3 (July-September) and Q4 (October-December) in 2022.
- Over a third (36%) of training and development visits were made by females and the majority (69%) of all visitors were between the ages of 25 and 44 years of age in 2022.

Seasonality by Visits



Top 5 Markets by Volume	Visits (000)	Top 5 Markets by Value	Visits (£m)
France	34	USA	67
Irish Republic	27	France	50
USA	24	Saudi Arabia	26
Netherlands	22	Germany	23
Germany	21	South Africa	22

Averages	2022
Average Spend per Visit	£1,708
Average Nights per Visit	10.6
Average Spend per Night	£162



Lorry driving - 2022

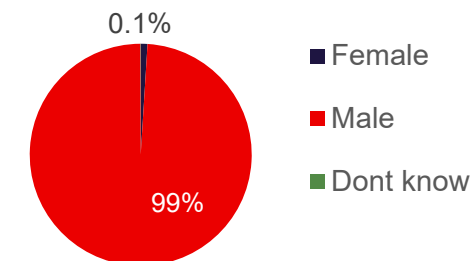
- Lorry drivers accounted for one in four (26%) of the Business visits made from overseas to the UK in 2022. However, they contributed only 4% of all Business spending with the lowest average length of stay and spend per night of all business visit types in 2022.
- This category contributed 1.4 million inbound visits and a combined spend of £183 million in 2022.
- The dominance of Poland and Romania amongst Lorry Drivers is stark here. Over half of all visits (54%) and close to half (45%) of the Lorry driver spending in 2019 were from these 2 markets.
- Due to the UK's proximity to Europe and ease of access, virtually all lorry drivers came from Europe in 2022, with only a few arriving from Africa.

Seasonality by Visits



Top 5 Markets by Volume	Visits (000)	Top 5 Markets by Value	Visits (£m)
Poland	441	Poland	52
Romania	295	Romania	30
Hungary	81	Spain	22
Spain	71	France	21
France	56	Hungary	12

Averages	2022
Average Spend per Visit	£136
Average Nights per Visit	2.1
Average Spend per Night	£64



Understanding Business Visits to the UK

