

# **Quarterly and Annual Inbound Update UK's Nations & Regions**

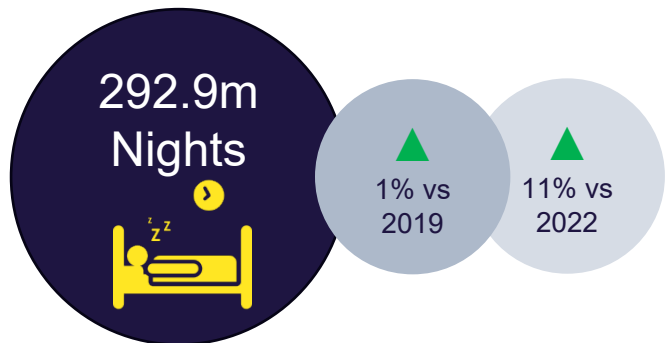
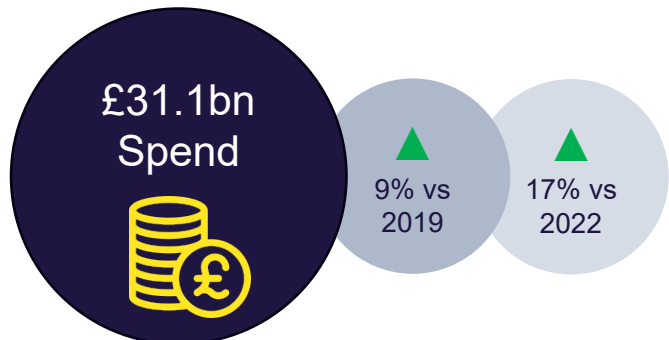
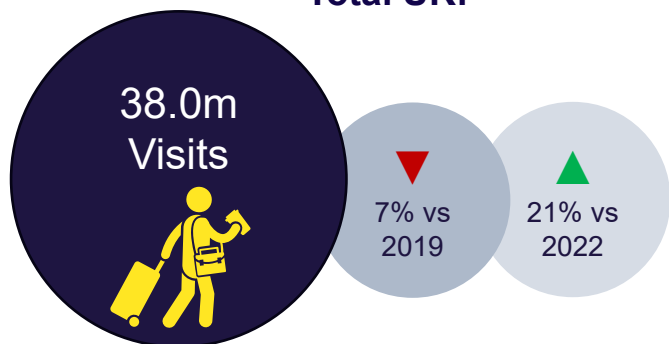
Q4 2023 and Full Year 2023

International Passenger Survey by the ONS

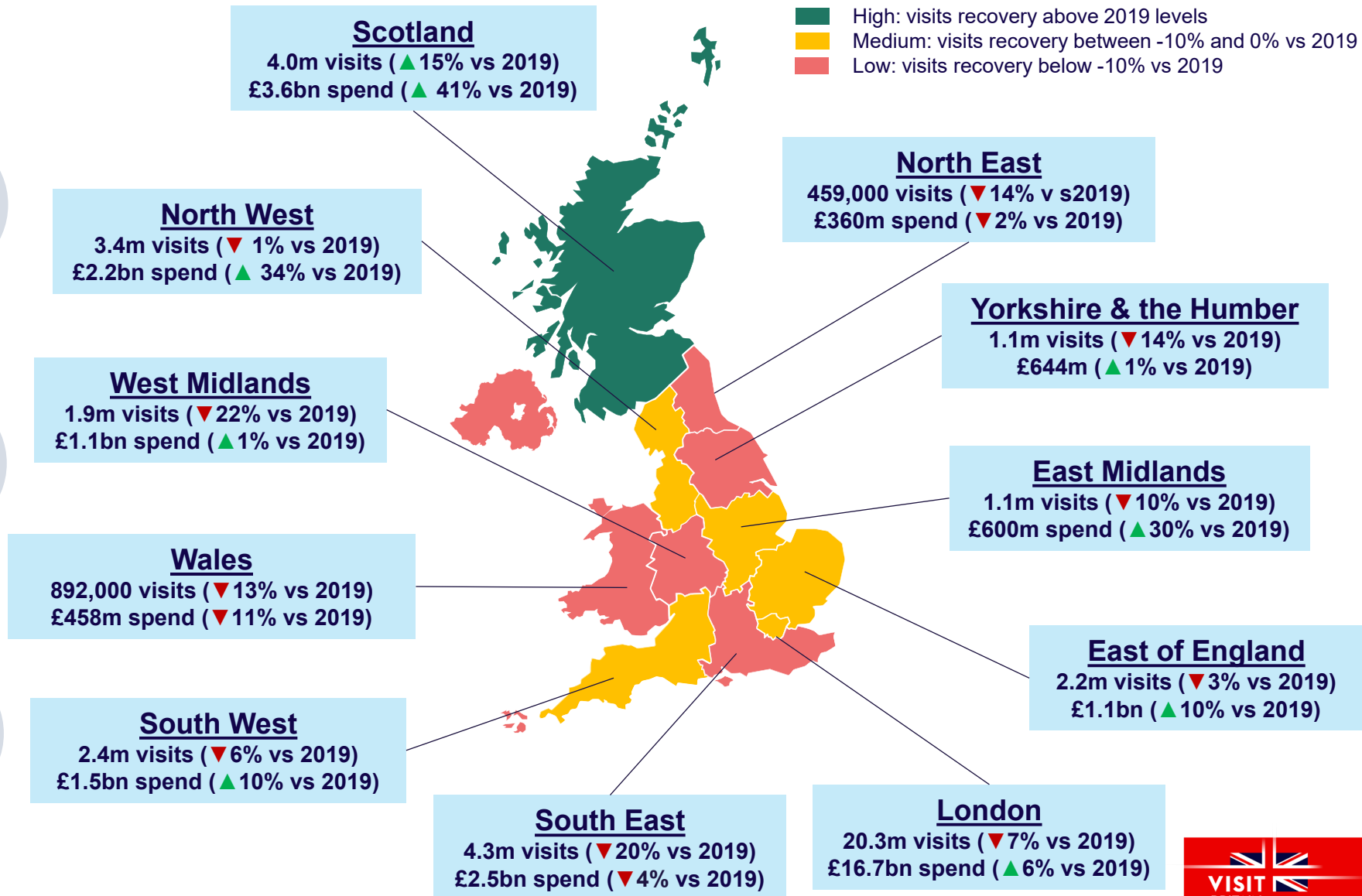
(Published 17<sup>th</sup> May 2024)



# Headline statistics for IPS 2023: Nations & Regions



■ High: visits recovery above 2019 levels  
■ Medium: visits recovery between -10% and 0% vs 2019  
■ Low: visits recovery below -10% vs 2019



International Passenger Survey by the ONS.



# Contents

- Headline Statistics for IPS nations and regions 2023 (infographic)
- Revisions to the 2019-2022 dataset
- About this data

## 1. Summary

## 2. Latest full year: Inbound nations and regions – full year 2023

- Visits
- Spend

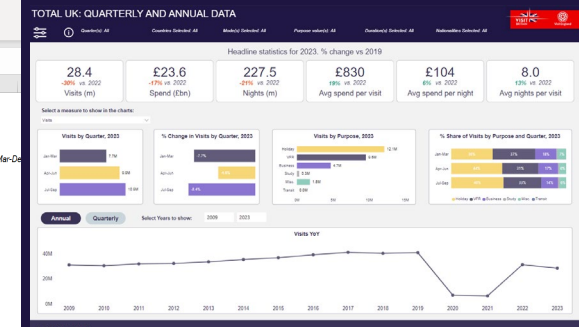
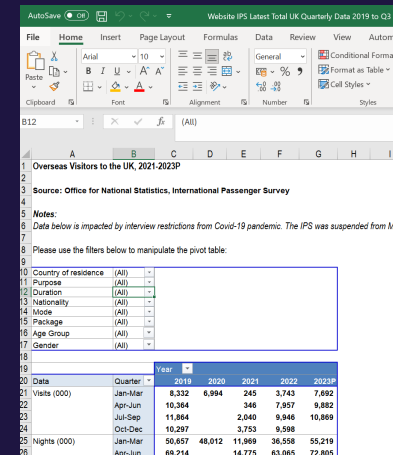
## 3. Latest quarter: Inbound nations and regions: Q4 2023

- Visits
- Spend

## 4. Survey background

- Sample size
- Impact of COVID-19 on IPS data from 2020-2022

Explore the IPS 2023 data in more detail on the [VisitBritain website](#) which includes pivot tables (Excel) and interactive dashboards.



Make sure you get all the latest figures and reports by [signing-up for VisitBritain's e-newsletter](#).

# Revisions to the 2019-2022 datasets

- The Office for National Statistics have made improvements to the estimates for the UK's nations and regions from 2019-2022. This includes London, Rest of England, England, England Regions, Scotland and Wales.
- These improvements have led to small changes (<4%) across visits, spend and nights when comparing the old and revised datasets at the UK nations and regions level across 2019-2022. Larger changes may be seen when cross tabulating the data by other characteristics.
- VisitBritain will be working to add revised data to existing nation/region outputs across the VisitBritain website over the next few months. We have highlighted this on the relevant pages of our website. The IPS visualisations on our website will be updated with the new data shortly after the release.
- Please visit the [ONS website](#) for more information.

# About this data

This report is based on the latest International Passenger Survey (IPS) data released by the Office for National Statistics (ONS) on the morning of **17<sup>th</sup> May 2024**. This data refers to Q4 2023 and 2023 overall. Please note the ONS will be pausing monthly publications for Jan-Jun 2024 data so the next data release will be Q1 2024 due out in July 2024. The ONS have made revisions to the 2019-2022 dataset across nations and regions with more information on the [ONS website](#). Will be releasing subregional data in the next few months.

The IPS data is based on interviews with a sample of departing visitors. The number interviewed varies but is typically around 3,000 per month. Sample sizes at the quarterly level for some analysis and comparisons can be low and results should be treated with caution, especially for spending. Please refer to the [ONS website](#) for information on confidence levels.

Please also note:

- All data is sourced from the International Passenger Survey by the Office for National Statistics.
- All figures quoted are not “seasonally adjusted”.
- Numbers in some tables / charts may not sum due to rounding.
- All values and percentage changes in spend are in nominal terms (i.e. not taking inflation into account), unless stated
- From 2021, data excludes the Irish land border data

Refer to the [ONS website](#) for more on IPS methodology and UK outbound travel. Please visit the [VisitBritain research webpage](#) for more detail on inbound tourism to the UK.

## Definitions:

- **Visit** - all departing visits from overseas residents (including those who may be UK nationals but live elsewhere, excluding other nationals who have been in the UK for 12 months or longer)
- **Spend** - the amount visitors report spending in the UK during their stay

# 1. Summary

Q4 2023 and Full Year 2023

# Summary

**Overall UK summary: total inbound visits in 2023 remained below 2019 levels but showed positive growth vs 2022 until a decline in Q4. Inbound visitors set a new spend record but tracked down in real terms vs 2019 and 2022.**

## **The majority of nations and regions saw growth in inbound visits vs 2022 but remained below 2019 levels**

- Of the 38.0m inbound visits to the UK in 2023, London received a little over half (53%). This is in line with the proportions of visits received prior to COVID-19 and in 2022. Visits to London were 7% below 2019, the same as for the UK overall.
- Visits to England outside London in total were 10% below 2019. The most visited England regions (excluding London) in 2023 were the South East (4.3m visits), the North West (3.4m visits) and the South West (2.4m visits).
- Scotland posted the strongest recovery and was the only nation/region to surpass 2019 levels at a record 4.0m visits in 2023, up 15% on 2019, helped by strong growth in visits from North America.
- Although visits to Wales were 13% below 2019 levels, it did show the strongest recovery vs 2022 (up 30% vs with 892,000 visits).

## **Most nations and regions saw record spend in nominal terms**

- Visitors to London spent a record £16.7bn in the capital in 2023, up 6% on 2019 and up 18% vs 2022.
- Of the English regions (outside London), the South East (£2.5bn spend), the North West (£2.2bn spend) and the South West (£1.5bn spend) reported the largest value. North West, West Midlands, East Midlands, East of England and South West all set spend records in 2023.
- Inbound visitors to Scotland in 2023 spent a record setting £3.6bn, up 41% vs 2019 and up 13% vs 2022.
- Visitors to Wales spent £458 million in 2023, still below pre-pandemic levels (-11%) but higher than in 2022 (16%).

## **2. Latest full year: Inbound Nations and Regions**

**Full year 2023**



# 2023 regional headlines – Visits (000)

Visits (000)	2019	2021	2022	2023	% change vs 2019	% change vs 2022
London	21,714	2,719	16,126	20,277	-7%	26%
<i>Rest Of England</i>	16,930	3,246	13,181	15,231	-10%	16%
North East	536	105	477	459	-14%	-4%
North West	3,441	708	2,655	3,417	-1%	29%
Yorkshire	1,328	228	1,058	1,147	-14%	8%
West Midlands	2,428	417	1,642	1,889	-22%	15%
East Midlands	1,202	246	962	1,083	-10%	13%
East Of England	2,266	551	2,035	2,209	-3%	9%
South West	2,599	393	2,104	2,431	-6%	16%
South East	5,396	846	3,641	4,312	-20%	18%
Scotland	3,457	479	3,242	3,987	15%	23%
Wales	1,027	124	687	892	-13%	30%
<b>Total UK</b>	<b>40,857</b>	<b>6,384</b>	<b>31,244</b>	<b>37,959</b>	<b>-7%</b>	<b>21%</b>

- The majority of inbound visits to all UK nations and regions didn't quite recover to 2019 levels in 2023, although most did show growth vs 2022.
- Of the 38.0m inbound visits to the UK in 2023, London received a little over half (53%). This is in line with the proportions of visits received prior to COVID-19 and 2022.
- The most visited England regions (excluding London) in 2023 were the South East (4.3m visits), the North West (3.4m visits) and the South West (2.4m visits).
- Scotland showed the strongest recovery and was the only nation to surpass 2019 levels at a record 4.0m visits in 2023.
- Although visits to Wales were 13% below 2019 levels, it did show the strongest recovery vs 2022 (up 30% vs 2022 with 892,000 visits).

# 2023 regional headlines – Spend (£m)

Spend (£m)	2019	2021	2022	2023	% change vs 2019	% change vs 2022
London	£15,700	£2,689	£14,149	£16,697	6%	18%
Rest Of England	£9,051	£2,326	£8,444	£9,893	9%	17%
North East	£367	£88	£311	£360	-2%	16%
North West	£1,611	£490	£1,632	£2,155	34%	32%
Yorkshire	£637	£178	£533	£644	1%	21%
West Midlands	£1,043	£277	£864	£1,058	1%	22%
East Midlands	£461	£149	£514	£600	30%	17%
East Of England	£1,019	£318	£1,004	£1,116	10%	11%
South West	£1,327	£245	£1,291	£1,464	10%	13%
South East	£2,581	£580	£2,286	£2,477	-4%	8%
Scotland	£2,547	£462	£3,192	£3,593	41%	13%
Wales	£515	£67	£394	£458	-11%	16%
Total UK	£28,448	£5,646	£26,497	£31,075	9%	17%

- While overall visits levels were 93% of that reported in 2019, inbound spend to the UK has recovered at a faster pace. *Please note these figures do not account for inflation. Total inflation from 2019 to 2023 was 21%, and for 2022 to 2023, it was 7%.*
- Visitors to London spent a record £16.7bn in the capital in 2023, up 6% on 2019 and up 18% vs 2022.
- Of the English regions (outside London), the South East (£2.5bn spend), the North West (£2.2bn spend) and the South West (£1.5bn spend) reported the largest value. North West, West Midlands, East Midlands, East of England and South West all set spend records in 2023.
- Most England regions reported spend growth vs 2019, apart from the North East and South East which were just below pre-pandemic levels, and all regions reported growth vs 2022.
- Inbound visitors to Scotland in 2023 spent a record setting £3.6bn, up 41% vs 2019 and up 13% vs 2022.
- Visitors to Wales spent £458 million in 2023, still below pre-pandemic levels (-11%) but higher than in 2022 (16%).

# 3. Latest quarter: Inbound Nations and Regions

Q4 2023 (October to December)



# Quarterly regional headlines – Visits (000)

Visits (000)	Q1 2023	% change vs. Q1 2019	% change vs. Q1 2022	Q2 2023	% change vs. Q2 2019	% change vs. Q2 2022	Q3 2023	% change vs. Q3 2019	% change vs. Q3 2022	Q4 2023	% change vs. Q4 2019	% change vs. Q4 2022
London	4,190	-8%	127%	5,319	-1%	25%	5,438	-11%	12%	5,330	-6%	3%
Rest Of England	3,087	-6%	84%	3,895	-11%	21%	4,679	-12%	6%	3,571	-10%	-8%
North East	60*	-37%	31%	117	-19%	-15%	185	2%	5%	96*	-15%	-18%
North West	745	8%	124%	849	-7%	21%	947	5%	10%	877	-7%	15%
Yorkshire	243	-4%	85%	305	0%	30%	351	-22%	1%	247	-22%	-28%
West Midlands	415	-23%	86%	490	-21%	23%	561	-24%	15%	423	-21%	-20%
East Midlands	227	-11%	69%	274	-2%	32%	347	-3%	0%	235	-24%	-14%
East Of England	479	12%	56%	583	7%	22%	605	-20%	-11%	543	0%	-6%
South West	354	-13%	63%	611	-12%	13%	947	-6%	19%	519	6%	-6%
South East	781	-15%	98%	1,096	-24%	25%	1,460	-22%	9%	974	-17%	-5%
Scotland	569	29%	124%	1,166	28%	50%	1,443	14%	6%	810	-3%	-6%
Wales	150	-4%	106%	254	-17%	38%	350	-8%	34%	138	-25%	-19%
<b>Total UK</b>	<b>7,686</b>	<b>-8%</b>	<b>105%</b>	<b>9,906</b>	<b>-4%</b>	<b>24%</b>	<b>10,928</b>	<b>-8%</b>	<b>10%</b>	<b>9,441</b>	<b>-8%</b>	<b>-2%</b>

- At the total UK level, visits in Q4 2023 were still behind 2019 levels.
- All UK nations and regions saw a peak in inbound visitor numbers during the traditional summer quarter (Q3 – July to September).
- Most England regions saw a dip in Q4 2023 vs Q4 2019. Many also saw a dip in visits vs Q4 2022 as well, apart from London which showed the strongest recovery with visits up 3%.
- Scotland saw 810,000 visits in Q4 2023, down 3% vs 2019 and down 6% vs 2022.
- Wales received 138,000 inbound visits in Q4 2023, down by 25% vs 2019 and down 19% vs 2022.

International Passenger Survey by the ONS. \*Caution: low sample size. TOTAL UK figures do not the sum of each region as visitors may visit more than one nation/region. Please note caveats to data on slide 16.

# Quarterly regional headlines – Spend (£m)

Spend (£m)	Q1 2023	% change vs. Q1 2019	% change vs. Q1 2022	Q2 2023	% change vs. Q2 2019	% change vs. Q2 2022	Q3 2023	% change vs. Q3 2019	% change vs. Q3 2022	Q4 2023	% change vs. Q4 2019	% change vs. Q4 2022
London	£3,355	8%	102%	£4,265	15%	14%	£4,704	5%	12%	£4,372	0%	-4%
Rest Of England	£1,767	32%	92%	£2,338	7%	16%	£3,558	10%	11%	£2,230	-2%	-3%
North East	£65*	68%	58%	£74	-9%	33%	£134	25%	0%	£87*	-38%	9%
North West	£373	34%	97%	£534	18%	30%	£657	43%	21%	£590	40%	21%
Yorkshire	£132	66%	106%	£156	51%	11%	£246	-12%	40%	£110	-37%	-28%
West Midlands	£191	11%	130%	£271	45%	29%	£378	-14%	25%	£218	-10%	-19%
East Midlands	£133	78%	126%	£124	6%	12%	£222	44%	6%	£121	5%	-10%
East Of England	£250	74%	124%	£246	-8%	-2%	£384	5%	0%	£236	-3%	-8%
South West	£204	16%	54%	£382	9%	24%	£572	6%	11%	£306	17%	-8%
South East	£413	8%	74%	£546	-14%	3%	£961	9%	3%	£558	-18%	-5%
Scotland	£355	68%	93%	£1,088	53%	23%	£1,502	43%	7%	£648	12%	-10%
Wales	£67	22%	48%	£122	-8%	21%	£202	0%	31%	£67	-47%	-29%
<b>Total UK</b>	<b>£5,621</b>	<b>17%</b>	<b>97%</b>	<b>£7,913</b>	<b>15%</b>	<b>16%</b>	<b>£10,113</b>	<b>10%</b>	<b>12%</b>	<b>£7,428</b>	<b>-2%</b>	<b>-4%</b>

- Total inbound spend in 2023 had been growing each quarter and surpassed both 2019 and 2022 levels up to Q3. However, in Q4 inbound spend dipped back below pre-pandemic levels.
- In Q4 2023, the majority of the UK's nations and regions saw spend below 2019 levels, apart from London (on par with 2019), North West (+40%), East Midlands (+5%), South West (+17%) and Scotland (+12%).
- North East and North West were the only regions to report growth vs Q4 2022.
- In Q4, inbound visitors spent £648m in Scotland, 12% up vs 2019 but 10% down vs 2022.
- Spend in Wales reached £67m, down by 47% vs Q4 2019 and down 29% vs Q4 2022.

International Passenger Survey by the ONS. All values and percentage changes in spend are in nominal terms unless otherwise stated. \*Caution: low sample size. Please note caveats to data on slide 16.

## 4. Survey background

# Sample size

Visits (000)	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023
London	3,882	4,615	4,693	4,111	17,301
Rest Of England	3,137	3,394	3,638	2,708	12,877
North East	68	105	148	72	393
North West	814	823	699	637	2,973
Yorkshire	218	276	300	205	999
West Midlands	527	444	475	368	1,814
East Midlands	241	235	262	179	917
East Of England	358	444	465	356	1,623
South West	407	525	670	357	1,959
South East	720	953	1,168	811	3,652
Scotland	605	998	1,076	584	3,263
Wales	253	230	340	158	981
Total UK	9,193	10,393	10,877	8,717	39,180

- **Sample advice** – If the sample is less than 30 we do not recommend use of this data. For sample sizes between 30 and 100 we recommend the data be treated as indicative. Sample sizes over 100 are more reliable.

International Passenger Survey by the ONS 2023. TOTAL UK figures do not the sum of each region as visitors may visit more than one nation/region.

# Impact of COVID-19 on IPS data from 2020-2022

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.
- **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](#)



# Regional Quarterly Inbound Update & Full Year 2023

Q4 2023 and Full Year 2023

International Passenger Survey by the ONS

(Published 17<sup>th</sup> May 2024)

