

# Quarterly Inbound Update GB's Nations & Regions

Provisional Q1 and Q2 2024 (January to June)  
International Passenger Survey by the ONS  
(Published 18<sup>th</sup> October 2024)

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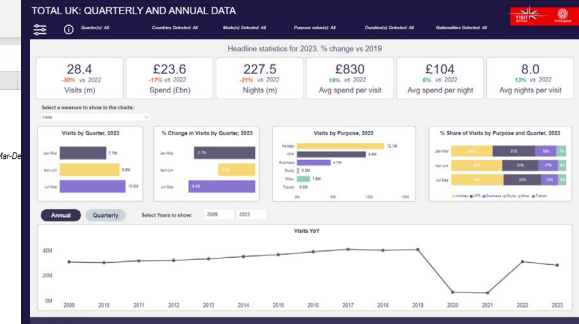
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Explore the IPS 2024 data in more detail on the [VisitBritain website](#) which includes pivot tables (Excel) and interactive dashboards.

|              | Year    | 2019   | 2020   | 2021   | 2022   | 2023P  |
|--------------|---------|--------|--------|--------|--------|--------|
| Visits (000) | Jan-Mar | 8,332  | 6,994  | 245    | 3,743  | 7,692  |
|              | Apr-Jun | 10,364 | 346    | 7,957  | 9,882  |        |
|              | Jul-Sep | 11,864 | 2,040  | 9,846  | 10,869 |        |
|              | Oct-Dec | 10,297 | 3,753  | 9,598  |        |        |
| Nights (000) | Jan-Mar | 50,657 | 48,012 | 11,069 | 36,558 | 55,219 |
|              | Apr-Jun | 69,214 | 14,775 | 63,065 | 72,805 |        |



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# 1. Summary

Q1 and Q2 2024 (Jan-Jun)

## **2. Latest quarter: Inbound Nations and Regions**

**Q1 and Q2 2024 (Jan-Jun)**

# Summary

**GB: Provisional data shows inbound visits remained just above 2019 levels from Jan-Jun 2024 but spend was still down vs 2019 and 2023 in real terms.**

**Nations and regions: Scotland continues to lead recovery in Q1 and Q2 2024, Wales shows y-o-y growth in Q2, although visits are still just below 2019 levels. For many England regions' growth seen in Q1 2024 slowed down in Q2 2024 (vs 2019 and 2023), with many regions reaching a record high spend in Q2 2024.**

## Visits:

- Year-to-date 2024 inbound visits to London and Rest of England increased when compared to 2019 and 2023, with record visits to the Rest of England.
- In Jan-Jun 2024, the majority of England regions showed an increase in visits vs 2019 levels, with the exception of West Midlands and South East, and vs 2023, apart from East of England. Generally, Q2 2024 was weaker than Q1 2024 in terms of recovery to 2019 levels.
- Inbound visits to Scotland from Jan-Jun 2024 reached a new record.
- Visits to Wales continued to grow and showed an increase vs 2023 but were still slightly behind 2019 levels.

## Spend (in nominal terms, when not adjusted for inflation):

- In Jan-Jun 2024, spend in London was up vs 2019 but down slightly vs 2023 (due to a weaker Q2) whilst spend to the Rest of England surpassed both comparison years with a new record.
- For spend across the same time period, all England regions showed growth vs 2019. When comparing to 2023, 4 regions (outside London) saw a decrease in spend: North East, Yorkshire, East Midlands, and East of England.
- Scotland also led inbound spend recovery with a record spend in Jan-Jun 2024.
- In Jan-Jun 2024, inbound spend in Wales was above 2019 and 2023 levels.

# Quarterly regional headlines – Visits (000)

| Visits (000)    | Q1 2024      | Record? | % change vs. Q1 2019 | % change vs. Q1 2023 | Q2 2024       | Record? | % change vs. Q2 2019 | % change vs. Q2 2023 | YTD 2024      | Record? | % change vs. YTD 2019 | % change vs. YTD 2023 |
|-----------------|--------------|---------|----------------------|----------------------|---------------|---------|----------------------|----------------------|---------------|---------|-----------------------|-----------------------|
| London          | 4,836        |         | 6%                   | 15%                  | 5,591         |         | 4%                   | 5%                   | 10,427        |         | 5%                    | 10%                   |
| Rest Of England | 3,498        | Yes     | 6%                   | 13%                  | 4,357         |         | 0%                   | 12%                  | 7,855         | Yes     | 3%                    | 13%                   |
| North East      | 107*         |         | 11%                  | 78%                  | 141*          |         | -3%                  | 21%                  | 248           |         | 3%                    | 40%                   |
| North West      | 823          | Yes     | 19%                  | 11%                  | 1,007         | Yes     | 10%                  | 19%                  | 1,831         | Yes     | 14%                   | 15%                   |
| Yorkshire       | 259          |         | 2%                   | 6%                   | 302           |         | -1%                  | -1%                  | 560           |         | 0%                    | 2%                    |
| West Midlands   | 575          | Yes     | 6%                   | 38%                  | 553           |         | -10%                 | 13%                  | 1,128         |         | -3%                   | 25%                   |
| East Midlands   | 237          |         | -7%                  | 4%                   | 334           | Yes     | 20%                  | 22%                  | 572           |         | 7%                    | 14%                   |
| East Of England | 498          |         | 17%                  | 4%                   | 519           |         | -5%                  | -11%                 | 1,017         |         | 5%                    | -4%                   |
| South West      | 452          | Yes     | 11%                  | 28%                  | 724           |         | 4%                   | 18%                  | 1,175         | Yes     | 7%                    | 22%                   |
| South East      | 879          |         | -4%                  | 13%                  | 1,292         |         | -10%                 | 18%                  | 2,171         |         | -8%                   | 16%                   |
| Scotland        | 617          |         | 39%                  | 8%                   | 1,358         | Yes     | 49%                  | 17%                  | 1,975         | Yes     | 46%                   | 14%                   |
| Wales           | 153          |         | -2%                  | 2%                   | 292           |         | -5%                  | 15%                  | 445           |         | -4%                   | 10%                   |
| <b>Total GB</b> | <b>8,731</b> |         | <b>5%</b>            | <b>14%</b>           | <b>10,778</b> |         | <b>4%</b>            | <b>9%</b>            | <b>19,509</b> |         | <b>4%</b>             | <b>11%</b>            |

- At the total GB level, inbound visits from Jan-Jun 2024 surpassed 2019 and 2023 levels.
- Across the first half of the year, visits to London and Rest of England recovered to similar levels vs 2019 (5% and 3%) and vs 2023 (10% vs and 3%). From Jan-June, record visits were seen to Rest of England (as a grouping) at 7.9m visits whilst London welcomed 10.4m visits.
- Most England regions saw growth in visits in Q1 vs 2019 but some saw a drop into Q2. Year-to-date (YTD) visits show growth across most regions vs 2019 apart from West Midlands (-3%) and South East (8%). When looking at growth vs 2023, East Midlands (-4%) was the only region to see a decrease. The most visited England regions (after London) in Q2 were South East, North West, South West and West Midlands.
- Scotland continued to see the strongest recovery into 2024 with record visits in Q2. YTD visits totalled at a record 2.0m visits, up 46% vs 2019 and up 14% vs 2023. Inbound visits to Wales reached 445,000 visits from Jan-Jun 2024, up 10% vs 2023 but still 4% below 2019 levels.

International Passenger Survey by the ONS 2024P. \*Caution: low sample size. TOTAL GB figures do not the sum of each region as visitors may visit more than one nation/region. Note 2024 data is at the GB level with comparisons made to 2019 and 2023 UK level data – see slide 10 for more info.

# Quarterly regional headlines – Spend (£m)

| Spend (£m)      | Q1 2024 | Record? | % change vs. Q1 2019 | % change vs. Q1 2023 | Q2 2024 | Record? | % change vs. Q2 2019 | % change vs. Q2 2023 | YTD 2024 | Record? | % change vs. YTD 2019 | % change vs. YTD 2023 |
|-----------------|---------|---------|----------------------|----------------------|---------|---------|----------------------|----------------------|----------|---------|-----------------------|-----------------------|
| London          | £ 3,352 |         | 8%                   | 0%                   | £ 4,078 |         | 10%                  | -4%                  | £ 7,430  |         | 9%                    | -2%                   |
| Rest Of England | £ 1,734 |         | 29%                  | -2%                  | £ 2,445 | Yes     | 12%                  | 5%                   | £ 4,179  | Yes     | 18%                   | 2%                    |
| North East      | £ 41*   |         | 5%                   | -37%                 | £82*    | Yes     | 2%                   | 12%                  | £ 123    |         | 3%                    | -11%                  |
| North West      | £ 393   | Yes     | 41%                  | 5%                   | £ 538   | Yes     | 19%                  | 1%                   | £ 931    | Yes     | 28%                   | 3%                    |
| Yorkshire       | £ 107   |         | 34%                  | -19%                 | £ 110   |         | 6%                   | -30%                 | £ 217    |         | 18%                   | -25%                  |
| West Midlands   | £ 239   |         | 40%                  | 25%                  | £ 243   |         | 30%                  | -10%                 | £ 482    | Yes     | 35%                   | 5%                    |
| East Midlands   | £ 88    |         | 17%                  | -34%                 | £ 140   | Yes     | 19%                  | 12%                  | £ 228    |         | 19%                   | -12%                  |
| East Of England | £ 177   |         | 23%                  | -29%                 | £ 236   |         | -12%                 | -4%                  | £ 413    |         | 0%                    | -17%                  |
| South West      | £ 257   |         | 47%                  | 26%                  | £ 422   | Yes     | 20%                  | 11%                  | £ 679    | Yes     | 29%                   | 16%                   |
| South East      | £ 432   | Yes     | 13%                  | 5%                   | £ 674   | Yes     | 7%                   | 23%                  | £ 1,106  | Yes     | 9%                    | 15%                   |
| Scotland        | £ 321   |         | 52%                  | -9%                  | £ 1,170 | Yes     | 65%                  | 7%                   | £ 1,491  | Yes     | 62%                   | 3%                    |
| Wales           | £ 68    |         | 24%                  | 2%                   | £ 134   |         | 1%                   | 10%                  | £ 203    |         | 8%                    | 7%                    |
| Total GB        | £ 5,530 |         | 15%                  | -1%                  | £ 7,902 |         | 15%                  | 0%                   | £ 13,433 |         | 15%                   | 0%                    |

- Total inbound spend from Jan-Jun 2024 surpassed 2019 levels and were level with 2023 (but saw a drop when adjusted for inflation).
- London received £7.4bn inbound spend from Jan-Jun 2024, up 9% vs 2019 but down 2% vs 2023. Spend to Rest of England from Jan-Jun 2024 totalled at a record £4.2bn, up 18% vs 2019 and up 2% vs 2023.
- From Jan-Jun 2024, all England regions showed year on year growth vs 2019. When comparing to 2023, 4 regions saw a decrease in spend; North East (-11%), Yorkshire (-25%), East Midlands (-12%) and East of England (-17%). Outside London, South East (£1.1bn), North West (£931m) and South West (£679m) recorded the highest spend.
- Scotland continued to lead recovery into 2024, with a record Q2 spend and total spend from Jan-Jun 2024 reaching a record £1.5bn, up 62% vs 2019 and up 3% vs 2023. Inbound spend to Wales reached £203m, up 8% vs 2019 and up 7% vs 2023.

International Passenger Survey by the ONS 2024P. \*Caution: low sample size. TOTAL GB figures do not the sum of each region as visitors may visit more than one nation/region. Note 2024 data is at the GB level with comparisons made to 2019 and 2023 UK level data – see slide 10 for more info. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated.

## 4. Survey background



# Sample size

| Visits (000)    | Q1 2024 | Q2 2024 |
|-----------------|---------|---------|
| London          | 3,508   | 3,516   |
| Rest Of England | 2,422   | 2,437   |
| North East      | 65      | 84      |
| North West      | 524     | 490     |
| Yorkshire       | 167     | 151     |
| West Midlands   | 441     | 355     |
| East Midlands   | 164     | 165     |
| East Of England | 293     | 287     |
| South West      | 316     | 416     |
| South East      | 675     | 807     |
| Scotland        | 387     | 622     |
| Wales           | 152     | 197     |
| Total GB        | 6,655   | 6,800   |

- **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.

# About this data (1)

This report is based on the provisional estimates from the International Passenger Survey (IPS) data released by the Office for National Statistics (ONS) on the morning of **18<sup>th</sup> October 2024**. This data includes detailed data for Q1 2024 and Q2 2024.

## Please note:

- The ONS are undertaking a QA review so historical data may be subject to marginal change - see [ONS website](#) for more information.
- 2024 data only covers inbound visits to Great Britain, as opposed to the United Kingdom which is usually reported, therefore inbound visits for Northern Ireland are not available in this publication. This is due to the [changes in the way Northern Ireland data is being collected in 2024](#). UK level data will be available in the annual 2024 publication in May 2025.
- There is only a marginal impact on the comparability of 2024 data vs previous years as the Northern Ireland data makes up a very small percentage of overall visits. Therefore, 2024 GB level data is still being compared to 2019 and 2023 UK level data.

## About this data (2)

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
- Read about the [impact of Covid-19](#) on data from 2020-2022
- 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

## Regions:

- **Rest of England** – all England regions, excluding London

## Other:

- **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
- **YoY** - Year on Year
- **YTD** – year-to-date

**For more information, please contact**

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