

# **Regional Quarterly Inbound Update & Full Year 2021**

Q4 2021 and Full Year 2021 by region

International Passenger Survey by the ONS

(published 16<sup>th</sup> August 2022)

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# 1. About this data

# 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 **16<sup>th</sup> August 2022**. This data is republished 2021 data as the ONS identified an issue with the data collected in 2021, linked to challenges collecting and publishing consistent data during the pandemic. More details can be found on the [ONS website](#).

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, but this has been severely impacted during 2021 due to COVID-19.

Please note that sample sizes at the quarterly level for some analysis and comparisons can be low and results should be treated with caution, especially for spending. For absolute clarity we have included sample sizes within this report where breakdowns have been provided.

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 percentage changes in spend are nominal.

Refer to the [ONS website](#) for more on IPS methodology and UK outbound travel.

# Important notice – continued impact of Covid-19 on IPS

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. The data was not made available by Mode, therefore we are unable to compare current AIR data to this period in 2020 and have opted to compare AIR data to 2019 instead.
- **2021** – revised 2021 published today will contain all collected by the ONS throughout 2021 but with the following caveats that no data was collected for those travelling to the UK by Eurotunnel and data for those arriving from Dover was only collected from Q3. The first section of the report will show the regional level data and the second section will cover the AIR market i.e. those departing the UK via an airport as the air data is the only mode (out of air, sea and tunnel) which has a complete dataset for 2021, enabling us to make comparisons to 2019 data. You can access regional data for previous years on the [regional page on vb.org](#). The sample for this period is very low so caution should be used when interpreting results.

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

# Definitions

## Regions:

- **Total Europe** includes **EU15** (Austria, Belgium, Denmark, France, Finland, Germany, Greece, Irish Republic, Italy, Luxembourg, Netherlands, Portugal, Spain and Sweden); **Other EU** (Bulgaria, Cyprus (South), Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia (note that Croatia has been included in the 'Other EU' category since it joined in July 2013; before July 2013 this group was labelled as A12) and **Rest of Europe** (European countries outside the EU (including Russia, Norway and Switzerland). Before July 2013 Croatia was also included here, but from July 2013 appears in Other EU)
- **North America** - Canada (including Greenland and St Pierre et Miquelon), USA (including Puerto Rico and US Virgin Islands)
- **Rest of World** – Countries outside Europe and North America (Africa, Asia, Central America, Middle East, Oceania, South America)

## Journey purpose:

- **VFR** - Visiting Friends and Relatives
- **Miscellaneous visits** - includes those for short term study, to attend sports events, for personal shopping, health or religious purposes, accompanying others and many more

## 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
- **AIR ONLY** – the second part of this publication contains data filtered to those who departed the UK on a flight. IPS interviewing was not able to take place at all sea and tunnel ports between January and December 2021 so air data is the most 'complete' set of data (out of sea, tunnel, air) for the mode data in 2021.

## **2. Latest inbound UK and market statistics Annual 2021 (January – December)**

### **Regional UK data**

# Notes on Regional level data

- This section covers the data that the [ONS have published](#) for the Regional level.
- Please note the following when interpreting the IPS 2021 data:
  - There were no IPS interviews at Eurotunnel in 2021 so the dataset excludes all passengers travelling on this mode of transport
  - Interviews at Dover only started in Q3 2021
  - Data is not seasonally adjusted
  - Please take in account the sample sizes and guidance on [slide 11](#)



# Regional summary 2021 – visits (000)

Visits (000) - Please see notes on slide 5 when interpreting the 2021 data

Region	Q1	Q2	Q3	Q4	2021
London	94	122	780	1728	2,723
Rest Of England	142	192	1,135	1,775	3,244
North East	4	6	38	58	105
North West	22	38	225	424	709
Yorkshire	8	15	86	118	227
West Midlands	21	23	143	231	418
East Midlands	20	17	89	122	248
East Of England	37	30	196	287	549
South West	19	22	150	203	394
South East	37	47	318	443	845
Scotland	8	25	166	279	479
Wales	4	11	42	67	124
<b>Total UK</b>	<b>245</b>	<b>346</b>	<b>2,040</b>	<b>3,753</b>	<b>6,384</b>

- There were more inbound visits to the Rest of England than to London in 2021, reflecting the impact COVID-19 had on tourism to cities. 3.2 million visits were taken to the Rest of England vs 2.7 million visits to London.
- Behind London, the most visited England regions were the South East (845,000 visits), the North West (709,000) and the East of England (549,000).
- Scotland received 479,000 visits whilst Wales received 124,000 visits.

*Notes:*

- *Please see sample sizes on slide 11 when interpreting the data*

# Regional summary 2021 – spend (£m)

## Spend (£m) - Please see notes on slide 5 when interpreting the 2021 data

Region	Q1	Q2	Q3	Q4	2021
London	£131	£192	£754	£1,613	£2,691
Rest Of England	£138	£290	£809	£1,092	£2,329
North East	£4	£9	£29	£43	£85
North West	£28	£64	£150	£250	£492
Yorkshire	£6	£21	£73	£79	£178
West Midlands	£21	£33	£112	£112	£278
East Midlands	£13	£22	£42	£71	£149
East Of England	£23	£46	£99	£152	£321
South West	£10	£31	£85	£118	£245
South East	£33	£64	£217	£267	£581
Scotland	£12	£42	£149	£255	£459
Wales	£3	£9	£29	£26	£66
<b>Total UK</b>	<b>£287</b>	<b>£538</b>	<b>£1,750</b>	<b>£3,011</b>	<b>£5,646</b>

- Inbound visitors spent £2.7bn in London vs. £2.3bn in the Rest of England in 2021.
- Behind London, inbound visitors spent £581m in the South East, followed by £492m in the North West.
- Visitors to Scotland spent £459m whilst visitors to Wales spent £66m.

### Notes:

- *Please see sample sizes on slide 11 when interpreting the data*

# Regional summary 2021 – sample sizes

**Sample size - Please see notes on slide 5 when interpreting the 2021 data**

Region	Q1	Q2	Q3	Q4	2021
London	410	1,346	2,127	3,602	7,485
Rest Of England	619	1,664	2,638	3,550	8,471
North East	20	53	118	131	322
North West	112	317	469	752	1,650
Yorkshire	42	141	200	201	584
West Midlands	97	181	359	515	1,152
East Midlands	46	149	177	244	616
East Of England	96	240	331	410	1,077
South West	59	205	413	579	1,256
South East	160	429	801	940	2,330
Scotland	88	206	514	818	1,626
Wales	19	101	124	169	413
<b>Total UK</b>	<b>1,123</b>	<b>3,260</b>	<b>5,175</b>	<b>7,892</b>	<b>17,450</b>

- **Sample advice** - If 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.

### **3. Latest inbound UK and market statistics Annual 2021 (January – December)**

#### **Regional UK data - AIR ONLY**

# AIR only: regional summary 2021 – visits (000)

**Visits (000) - Please note the data on this slide is for AIR only**

Total	Q1 2021	% change vs. Q1 2019	Q2 2021	% change vs. Q2 2019	Q3 2021	% change vs. Q3 2019	Q4 2021	% change vs. Q4 2019	2019	2021	% change vs. 2019
London	86	-98%	107	-98%	691	-86%	1,257	-73%	17,951	2,141	-88%
Rest Of England	114	-95%	154	-95%	834	-79%	1,332	-58%	12,834	2,434	-81%
North East	2	-98%	4	-96%	29	-81%	48	-47%	436	83	-81%
North West	19	-96%	32	-96%	170	-78%	343	-57%	2,876	564	-80%
Yorkshire	7	-96%	11	-95%	61	-83%	86	-64%	1,015	165	-84%
West Midlands	20	-95%	18	-96%	91	-82%	143	-65%	1,717	271	-84%
East Midlands	9	-93%	14	-93%	45	-83%	76	-67%	845	146	-83%
East Of England	25	-92%	24	-94%	154	-72%	220	-49%	1,707	423	-75%
South West	9	-97%	18	-97%	105	-85%	164	-58%	1,942	295	-85%
South East	25	-96%	38	-96%	231	-81%	320	-64%	3,799	614	-84%
Scotland	8	-98%	24	-97%	144	-86%	250	-68%	3,076	425	-86%
Wales	3	-98%	8	-96%	33	-86%	47	-68%	701	91	-87%
<b>Total UK</b>	<b>207</b>	<b>-97%</b>	<b>289</b>	<b>-96%</b>	<b>1,634</b>	<b>-82%</b>	<b>2,793</b>	<b>-67%</b>	<b>32,137</b>	<b>4,923</b>	<b>-85%</b>

Notes:

- Please see sample sizes on slide 15 when interpreting the data.
- An example of how to read this data is 'there were 86,000 visits to London in Q1 2021 by those departing the UK by air'.

International Passenger Survey by the ONS 2021. The number of visits by region does not add up to the total as some visitors stayed in more than one region.

# AIR only: regional summary 2021 – spend (£m)

**Spend (£m) - Please note the data on this slide is for AIR only**

Total	Q1 2021	% change vs. Q1 2019	Q2 2021	% change vs. Q2 2019	Q3 2021	% change vs. Q3 2019	Q4 2021	% change vs. Q4 2019	2019	2021	% change vs. 2019
London	£124	-96%	£178	-95%	£708	-82%	£1,279	-67%	14,010	£2,288	-84%
Rest Of England	£124	-90%	£259	-86%	£718	-74%	£941	-54%	7,832	£2,042	-74%
North East	£4	-88%	£7	-91%	£28	-73%	£42	-67%	337	£80	-76%
North West	£25	-90%	£62	-85%	£137	-68%	£232	-42%	1,499	£455	-70%
Yorkshire	£5	-92%	£17	-80%	£68	-73%	£66	-60%	563	£157	-72%
West Midlands	£18	-89%	£29	-82%	£106	-73%	£96	-58%	948	£249	-74%
East Midlands	£12	-80%	£21	-81%	£33	-76%	£57	-48%	417	£122	-71%
East Of England	£21	-84%	£42	-81%	£87	-69%	£124	-44%	856	£274	-68%
South West	£9	-94%	£26	-91%	£66	-84%	£106	-49%	1,060	£207	-80%
South East	£30	-91%	£56	-89%	£193	-73%	£218	-64%	2,146	£497	-77%
Scotland	£12	-94%	£41	-94%	£140	-84%	£244	-56%	2,313	£438	-81%
Wales	£3	-94%	£7	-93%	£23	-86%	£24	-80%	438	£56	-87%
<b>Total UK</b>	<b>£264</b>	<b>-94%</b>	<b>£489</b>	<b>-92%</b>	<b>£1,598</b>	<b>-80%</b>	<b>£2,510</b>	<b>-63%</b>	<b>24,843</b>	<b>£4,861</b>	<b>-80%</b>

Notes:

- Please see sample sizes on slide 15 when interpreting the data.
- An example of how to read this data is 'visitors who departed the UK by air spent £124m in London in Q1 2021'.

International Passenger Survey by the ONS 2021. The number of visits by region does not add up to the total as some visitors stayed in more than one region.

# AIR only: regional summary 2021 – sample sizes

**Sample size - Please note the data on this slide is for AIR only**

Total	Q1 2021	Q2 2021	Q3 2021	Q4 2021	2019	2021
London	318	860	1,283	2,158	9,384	4,619
Rest Of England	444	1,126	1,646	2,311	8,175	5,527
North East	16	49	101	112	301	278
North West	96	254	344	551	2,000	1,245
Yorkshire	38	108	151	158	754	455
West Midlands	82	147	267	343	1,189	839
East Midlands	39	134	121	191	587	485
East Of England	76	188	245	315	994	824
South West	44	168	307	431	1,748	950
South East	121	327	549	692	2,570	1,689
Scotland	82	173	410	619	1,834	1,284
Wales	16	82	98	144	725	340
Total UK	770	1,903	2,815	4,387	16,186	9,875

- **Sample advice** - If 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.