

Regional Quarterly Inbound Update: Q1 2022

International Passenger Survey by the ONS
(Published 23rd September 2022)



Contents

1. About this data

- About this data
- Impact of COVID-19 on IPS
- Definitions

2. Latest inbound UK Regional data – Q1 2022

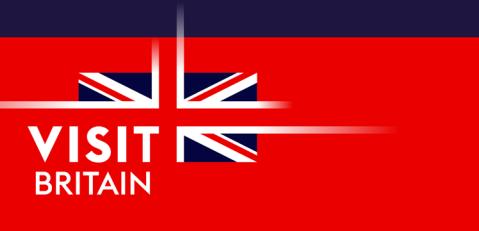
- Visits
- Spend

3. Latest inbound UK Regional data – Q1 2022 vs Q1 2019, excluding Eurotunnel

- Visits
- Spend

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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 **23rd September 2022**. This data covers revised Jan-Mar 2022 data but may be revised again for the annual 2022 release.

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** – data published for 2021 should be interpreted with the caveats that no data was collected for those travelling to the UK by Eurotunnel and data for those travelling via Dover was only collected from Q3. In addition, no estimates are included for any travel across the Irish border. Please see [our 2021 inbound data page](#) for more information.
- **Q1 2022** – the ONS were unable to restart interviewing at Eurotunnel during this period due to COVID-19 restrictions so data for this timeframe excludes travel via this port. In addition, no estimates are included for any travel across the Irish border. In section 2, we have carried out some additional analysis to exclude Eurotunnel from the 2019 IPS data so that we can make direct comparison between Q1 2019 and Q1 2022.

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

2. Latest inbound UK Q1 2022 (January – March)

Regional UK data



Regional summary Q1 2022 – Visits (000)

Please see notes on slide 5 when interpreting the Q1 2022 data

Region	Q1 2022 Visits (000)	Sample
London	1,878	3,178
Rest Of England	1,702	3,202
North East	45	82
North West	360	661
Yorkshire	132	226
West Midlands	221	473
East Midlands	132	228
East Of England	306	450
South West	217	497
South East	400	804
Scotland	277	488
Wales	73	147
Total UK	3,823	6,776

- Visits to Britain's nations and regions were still heavily impacted by the ongoing COVID-19 pandemic, namely the Omicron variant, in Q1 2022.
- There were 1.9 million visits to London in Q1 2022, representing 49% of inbound visits to the UK whilst the Rest of England received 1.7 million visits (45% of inbound visits).
- Behind London, the most visited English regions were the South East and North West.
- Scotland received 277,000 visits whilst Wales received 73,000 visits – accounting for 7% and 2% of total inbound visits, respectively.

(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.)

Regional summary Q1 2022 – Spend (£m)

Please see notes on slide 5 when interpreting the Q1 2022 data

Region	Q1 2022 Spend (£m)	Sample
London	£1,811	3,178
Rest Of England	£1,003	3,202
North East	£43	82
North West	£235	661
Yorkshire	£73	226
West Midlands	£85	473
East Midlands	£60	228
East Of England	£114	450
South West	£144	497
South East	£249	804
Scotland	£211	488
Wales	£54	147
Total UK	£3,097	6,776

- Inbound visitors spent £1.8bn in London in the first quarter of 2022 (58% of total inbound spend). Those visiting the Rest of England spent £1bn (32% total inbound spend).
- Behind London, the South East received £249m followed by the North West which received £235m.
- Visitors to Scotland spent £211m whilst visitors to Wales spent £54m.

(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 Q1 comparison: Q1 2022 vs
Q1 2019 - excluding Eurotunnel**

Regional UK data



Regional summary: Q1 2022 vs Q1 2019 - Visits (000)

Please note the data on this page excludes those travelling via Eurotunnel for Q1 2022 and Q1 2019

Region	Q1 2019 Visits (000)	Q1 2022 Visits (000)	% change	Q1 2019 Sample	Q1 2022 Sample
London	4,441	1,878	-58%	2,150	3,178
Rest Of England	3,031	1,702	-44%	1,839	3,202
North East	91	45	-51%	64	82
North West	664	360	-46%	415	661
Yorkshire	242	132	-45%	186	226
West Midlands	496	221	-55%	291	473
East Midlands	198	132	-33%	146	228
East Of England	399	306	-23%	203	450
South West	372	217	-42%	380	497
South East	834	400	-52%	560	804
Scotland	437	277	-37%	332	488
Wales	143	73	-49%	157	147
Total UK	7,905	3,823	-52%	3,797	6,776

- Comparing Q1 2022 to Q1 2019, visits to the Rest of England are recovering at a stronger pace than visits to London.
- The regions in England which seem to have recovered the most for visits are the East of England and the East Midlands.
- Visits to London, the West Midlands, the South East and the North East are down by more than a half in Q1 2022 (vs Q1 2019).
- Visits to Scotland were down by 37% whilst visits were down by half in Wales (-49%).

(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.)

International Passenger Survey by the ONS 2019 & 2022 with VisitBritain analysis. The number of visits by region does not add up to the total as some visitors stayed in more than one region.



Regional summary: Q1 2022 vs Q1 2019 - Spend (£m)

Please note the data on this page excludes those travelling via Eurotunnel for Q1 2022 and Q1 2019

Region	Q1 2019 Spend (£m)	Q1 2022 Spend (£m)	% change	Q1 2019 Sample	Q1 2022 Sample
London	£3,076	£1,811	-41%	2,150	3,178
Rest Of England	£1,287	£1,003	-22%	1,839	3,202
North East	£39	£43	10%	64	82
North West	£276	£235	-15%	415	661
Yorkshire	£74	£73	-1%	186	226
West Midlands	£169	£85	-50%	291	473
East Midlands	£67	£60	-10%	146	228
East Of England	£142	£114	-20%	203	450
South West	£156	£144	-8%	380	497
South East	£366	£249	-32%	560	804
Scotland	£206	£211	2%	332	488
Wales	£54	£54	0%	157	147
Total UK	£4,678	£3,097	-34%	3,797	6,776

- In Q1 2022, spend in London reached 59% of Q1 2019 levels vs 78% of Q1 2019 levels for the Rest of England.
- For spend in England, the North East was fairing better in 2022 vs 2019 but please note the low sample size. Elsewhere, spend in Yorkshire, South West, East Midlands and North West were seeing the strongest recovery.
- East of England, West Midlands, London and the South East were down by at least 20%.
- Spend in Scotland and Wales was similar in Q1 2019 and Q1 2022.

(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.)