Quarterly Inbound Update: Q1 2022

International Passenger Survey by the ONS

(Published 23rd September 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 **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 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 and market statistics Q1 2022 (January – March)

Total UK data

UK highlights: Q1 2022 (Jan-Mar)

Please see notes on slide 5 when interpreting the 2022 data

Total	Q1 2022
Visits	3.8 million
Spend	£3.1 billion
Nights	37.6 million

- There were 3.8 million inbound visits to the UK in Q1 2022, still well below pre-pandemic levels.
- Inbound visitors spent £3.1 billion in the first quarter.
- In total, 37.6 million nights were spent in the UK during this quarter.
- The average spend per visit was £810, but this excluded any spend by those departing the UK by Eurotunnel.

International Passenger Survey by the ONS 2022. Q1 sample: 8,456.

Journey Purpose: Q1 2022 (Jan-Mar)

Please see notes on slide 5 when interpreting the 2022 data

Journey Purpose	Visits Q1 2022	Spend Q1 2022
Holiday	928,000	£821m
VFR	1.7 million	£1.0bn
Business	787,000	£553m
Study	40,000	£166m
Miscellaneous (Excl. study)	392,000	£513m

- In the first quarter of 2022, all journey purposes were still a fraction of normal levels due to the ongoing impact of the COVID-19 pandemic.
- There were 1.7 million visits to friends and relatives, still making up the largest proportion of visits (44%) as they had been in 2021. These visitors spent £1.0bn, accounting for around one third of inbound spend.
- There were only 928,000 holiday visits from January to March, accounting for just under one quarter of all inbound visits. Holiday visitors spent £821m (27% of inbound spend).
- Following closely behind, there were 787,000 business visits in Q1 2022 who spent £553m.
- Study visits totalled at 40,000 with those visitors spending £166m in the UK.
- All other visits, under 'miscellaneous' accounted for 392,000 visits and £513m spend.

International Passenger Survey by the ONS 2022. Q1 sample: 8,456.

Global Regions: Q1 2022 (Jan-Mar)

Please see notes on slide 5 when interpreting the 2022 data

Global Regions	Visits Q1 2022	Spend Q1 2022
Total Europe	2.9 million	£1.5bn
→ EU Total	2.6 million	£1.4bn
→ EU 15	2.1 million	£1.2bn
→ Other EU	503,000	£174m
→ Rest of Europe	262,000	£173m
North America	427,000	£485m
Rest of World	509,000	£1.1bn

- By global region, the majority of visits were from Europe in Q1 2022 - totalling at 2.9 million visits (although this excludes visits by the Eurotunnel which is a popular route for those visiting from Europe). Visitors from Europe spent £1.5bn (50% of inbound spend).
- Within Europe, there were 2.6 million visits from EU markets vs 262,000 from the Rest of Europe – spending £1.4bn and £173m, respectively.
- There were 427,000 visits from North America who spent £485m in Q1 2022.
- Visits from the Rest of the World were still lagging behind with just 509,000 visits in Q1 with those visitors spending £1.1bn.

International Passenger Survey by the ONS 2022. Q1 sample: 8,456.

Selected market highlights: Q1 2022 (Jan-Mar)

Please see notes on slide 5 when interpreting the 2022 data

Country of residence	Visits (000) Q1 2022	Spend (£m) Q1 2022	Sample Q1 2022
Australia	43	£85	*163*
Belgium	110	£59	*138*
Brazil	45	£50	*106*
Canada	60	£43	*207*
China	2	£11	*5*
Denmark	54	£29	*125*
France	482	£290	*604*
Germany	212	£127	*516*
GCC*	135	£419	*360*
Hong Kong	3	£4	*11*
India	53	£65	*109*
Irish Republic	413	£181	*1,047*
Italy	162	£130	*291*
Japan	7	£8	*26*
Netherlands	183	£86	*399*
New Zealand	5	£9	*17*
Norway	46	£33	*136*
Poland	178	£38	*308*
Romania	116	£40	*194*
Russia	13	£11	*30*
Spain	281	£137	*595*
Sweden	61	£47	*163*
Switzerland	107	£68	*264*
USA	367	£442	*1,036*

- The top inbound markets for visits to the UK in Q1 2022 were France, the Irish Republic, the USA, Spain and Germany.
- For spend, the top markets were the USA, France, the Irish Republic, Saudi Arabia** and Spain.

Notes:

- An example of how to read this table is 'there were 43,000 visits from Australia to the UK in Q1 2022 with those visitors spending £85m.
- GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE).
- **The sample for Saudi Arabia is 68 so please use with caution.
- **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 2022. Q1 sample: 8,456.

3. Latest inbound UK and market statistics Q1 comparison: Q1 2022 vs Q1 2019

Excluding Eurotunnel

2019 vs 2022, excluding Eurotunnel

As mentioned on slide 5, the ONS were unable to interview travellers at Eurotunnel from January to March 2022, due to COVID-19 restrictions. In order to gain a better understanding of how 2022 inbound tourism is performing compared to previous years, we have carried out analysis to **exclude** the Eurotunnel data from 2019 so that we can directly compare the 2022 data to that dataset. Please find this analysis available on the next few slides.

UK highlights: Q1 2019 vs Q1 2022

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

Total	Q1 2019	Q1 2022	% change
Visits	7.9 million	3.8 million	-52%
Spend	£4.7bn	£3.1bn	-34%
Nights	48.2 million	37.6 million	-22%

- Excluding those travelling via Eurotunnel, visits in Q1 2022 were 52% below visits pre-pandemic in Q1 2019.
- Visitor spending was down by less at 34% below pre-pandemic levels.
- Spend per visit in Q1 2022 was much higher at £810 vs £593 in Q1 2019.
- Nights were down 22% in Q1 2022 vs Q1 2019.

Journey Purpose: Q1 2019 vs Q1 2022

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

Journey Purpose	Visits Q1 2019	Visits Q1 2022	% change
Holiday	2.8 million	928,000	-67%
VFR	2.6 million	1.7 million	-36%
Business	1.9 million	787,000	-59%
Study	75,000	40,000	-47%
Miscellaneous (Excl. study)	480,000	392,000	-18%

Journey Purpose	Spend Q1 2019	Spend Q1 2022	% change
Holiday	£2.0bn	£821m	-59%
VFR	£1.1bn	£1.0bn	-9%
Business	£1.2bn	£553m	-53%
Study	£113m	£166m	+46%
Miscellaneous (Excl. study)	£246m	£513m	+108%

- Holiday visits and spend were the most impacted across journey purpose when compared to Q1 2019 – down 67% and 59%, respectively.
- Visits to friends and relatives were down by 36% however spend was down by just 9% with those travelling for VFR staying for longer in the UK compared to Q1 2019.
- Business visits were down by more than half in Q1 2022 (compared to Q1 2019) with a similar picture for spend.
- Visits from those visiting the UK to study were down 47% but spend was up, driven by those staying for 15+ nights in Q1 2022.
- Miscellaneous visits were down 18% but spend was more than double driven again by a longer length of stay.

International Passenger Survey by the ONS 2019 & 2022 with VisitBritain analysis.

Selected market highlights: Q1 2019 vs Q1 2022 (Visits)

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

Country of residence	Q1 2019	Q1 2022	% change	Q1 2019 sample	Q1 2022 sample
Australia	139,000	43,000	-69%	*189*	*163*
Belgium	185,000	110,000	-41%	*119*	*138*
Brazil	74,000	45,000	-39%	*83*	*106*
Canada	132,000	60,000	-54%	*133*	*207*
China	119,000	2,000	-98%	*121*	*5*
Denmark	118,000	54,000	-54%	*86*	*125*
France	748,000	482,000	-36%	*555*	*604*
Germany	649,000	212,000	-67%	*444*	*516*
GCC*	1.2 million	135,000	-89%	*1,323*	*360*
Hong Kong	69,000	3,000	-95%	*85*	*11*
India	113,000	53,000	-53%	*113*	*109*
Irish Republic	645,000	413,000	-36%	*54*	*1,047*
Italy	463,000	162,000	-65%	*213*	*291*
Japan	76,000	7,000	-90%	*79*	*26*
Netherlands	353,000	183,000	-48%	*299*	*399*
New Zealand	22,000	5,000	-78%	*34*	*17*
Norway	138,000	46,000	-67%	*101*	*136*
Poland	360,000	178,000	-51%	*258*	*308*
Romania	201,000	116,000	-42%	*125*	*194*
Russia	27,000	13,000	-51%	*36*	*30*
Spain	514,000	281,000	-45%	*387*	*595*
Sweden	199,000	61,000	-70%	*108*	*163*
Switzerland	194,000	107,000	-45%	*124*	*264*
USA	758,000	367,000	-52%	*1,010*	*1,036*

International Passenger Survey by the ONS 2019 & 2022 with VisitBritain analysis.

- Comparing Q1 2019 to Q1 2022, France, The Irish Republic, Brazil, Belgium, Romania, Spain and Switzerland have recovered the most to pre-COVID levels in terms of inbound visits to the UK.
- **GCC*** includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE).
- **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.

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Selected market highlights: Q1 2019 vs Q1 2022 (Spend)

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

Country of residence	Q1 2019	Q1 2022	% change	Q1 2019 sample	Q1 2022 sample
Australia	£140m	£85m	-39%	189	163
Belgium	£54m	£59m	9%	119	138
Brazil	£64m	£50m	-23%	83	106
Canada	£135m	£43m	-68%	133	207
China	£220m	£11m	-95%	121	5
Denmark	£51m	£29m	-43%	86	125
France	£246m	£290m	18%	555	604
Germany	£234m	£127m	-46%	444	516
GCC*	£2,606m	£410m	-84%	1,323	360
Hong Kong	£106m	£4m	-96%	85	11
India	£101m	£65m	-36%	113	109
Irish Republic	£209m	£181m	-13%	54	1,047
Italy	£231m	£130m	-44%	213	291
Japan	£52m	£8m	-85%	79	26
Netherlands	£107m	£86m	-20%	299	399
New Zealand	£16m	£9m	-42%	34	17
Norway	£74m	£33m	-55%	101	136
Poland	£83m	£38m	-54%	258	308
Romania	£85m	£40m	-53%	125	194
Russia	£17m	£11m	-39%	36	30
Spain	£183m	£137m	-25%	387	595
Sweden	£78m	£47m	-40%	108	163
Switzerland	£107m	£68m	-37%	124	264
USA	£680m	£442m	-35%	1,010	1,036

International Passenger Survey by the ONS 2019 & 2022 with VisitBritain analysis.

- Comparing Q1 2019 to Q1 2022, France and Belgium generated more spend in Q1 2022 vs Q1 2019. Visitor spend had recovered most of its value from the Irish Republic, Netherlands, Brazil and Spain.
- **GCC*** includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE).
- **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.