

# **Regions and Nations Quarterly Inbound Update: Q3 2022**

International Passenger Survey by the ONS  
(Published 31<sup>st</sup> January 2023)

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# 1. Latest inbound UK Q3 2022 (Jul-Sep)

## Regions and Nations data

# Important note for interpreting reported data

- COVID-19 restrictions in 2022 meant that the ONS could not conduct IPS interviews at Eurotunnel (via Le Shuttle) from Jan-Jun 2022 (interviewing at **Eurostar was not affected** and continued as normal). Therefore, the data in this report for Jan-Jun 2022 excludes those travelling via Eurotunnel. The ONS restarted IPS interviews at all ports from July 2022 and therefore data for Q3 includes those travelling via all ports, including Eurotunnel.
- So that direct comparisons can be made we have *excluded* Eurotunnel data from the Jan-Jun 2019 data, in this report. The tables and analysis in this report follow the following format and so for clarity, we have indicated what data is represented for each time period and comparison period.
- *Please note:* Previous releases of Jan-Jun 2022 IPS data included estimated Eurotunnel data, so figures in this report may differ. Further 2022 revisions are possible in the annual release in the summer of 2023.

Data note	Q1 2022	% change vs Q1 2019	Q2 2022	% change vs Q2 2019	Q3 2022	% change vs Q3 2019	YTD 2022	% change vs YTD 2019
<b>What the data includes:</b>	All ports, <i>excluding</i> Eurotunnel	All ports, <i>excluding</i> Eurotunnel	All ports, <i>excluding</i> Eurotunnel	All ports, <i>excluding</i> Eurotunnel	All ports	All ports	All ports <i>excluding</i> Eurotunnel for Q1 & Q2 and all ports for Q3	All ports <i>excluding</i> Eurotunnel for Q1 & Q2 and all ports for Q3

# Summary of key points

- **London:** there were 4.9 million inbound visits to London in Q3 2022 (49% of inbound visits) down 20% on Q3 2019. Spending in London reached £4.2bn during this quarter, down 6% on Q3 2019 (46% of inbound spend).
- **Rest of England:**
  - The Rest of England received 4.4 million visits (45% of inbound visits) in Q3 2022, down 17% on Q3 2019. Visitors to the Rest of England spent £3.2bn (35% of inbound spend) in Q3 2022, down 1% on Q3 2019. Both visits and spend recovered at a slightly faster pace compared to London.
  - Behind London, the most visited English regions in Q3 were the **South East, North West** and **South West**. Inbound visitors spent the most in **South East, North West** and **South West**.
- **Scotland:** 14% of inbound visitors visited **Scotland** in Q3 equating to 1.4 million visits (just shy of the record in Q3 2017) which was 7% above Q3 2019 visits. Spend in **Scotland** grew to £1.4bn, up 34% on Q3 2019 (a new Q3 record).
- **Wales:** There were 259,000 visits to **Wales** in Q3 2022, 31% below Q3 2019 (around 3% of all inbound visits). Visitors spent £150m in Wales in Q3 2019, down 26% on Q3 2019.

# Quarterly Regions & Nations Headlines – Visits (000)

Visits (000)	Q1 2022	% change vs Q1 2019	Q2 2022	% change vs Q2 2019	Q3 2022	% change vs Q3 2019	YTD 2022	% change vs YTD 2019
London	1,685	-62%	3,952	-24%	4,869	-20%	10,506	-33%
Rest of England	1,653	-45%	3,175	-24%	4,426	-17%	9,253	-26%
North East	44	-52%	138	-6%	177	-3%	358	-15%
North West	334	-50%	704	-23%	856	-5%	1,894	-24%
Yorkshire	133	-45%	232	-22%	347	-24%	712	-28%
West Midlands	225	-55%	399	-30%	490	-33%	1,113	-38%
East Midlands	132	-33%	204	-22%	345	-4%	681	-17%
East Of England	301	-25%	464	-13%	678	-10%	1,443	-14%
South West	212	-43%	532	-22%	795	-21%	1,540	-25%
South East	386	-54%	860	-36%	1,341	-28%	2,587	-36%
Scotland	267	-39%	834	-8%	1,354	7%	2,455	-6%
Wales	72	-50%	184	-39%	259	-32%	515	-37%
Total UK	3,569	-55%	7,646	-23%	9,944	-16%	21,159	-29%

- Visits to Britain’s nations and regions grew between Q2 and Q3 2022.
- There were 4.9 million inbound visits to **London** in Q3 2022 (49% of inbound visits) down 20% on Q3 2019. Year-to-date (YTD) figures show visits to London were down by around one third compared to YTD 2019.
- Behind London, the most visited English regions in Q3 were the **South East, North West** and **South West**.
- The **Rest of England** received 4.4 million visits (45% of inbound visits), down 17% on Q3 2019. YTD figures show visits to the Rest of England were down 26% on 2019, recovering slightly faster than London.
- 14% of inbound visitors visited **Scotland** in Q3 equating to 1.4 million visits (just shy of the record in Q3 2017) which was 7% above Q3 2019 visits.
- There were 259,000 visits to **Wales** in Q3, 31% below Q3 2019 (around 3% of all inbound visits).

International Passenger Survey by the ONS 2019 & 2022. The number of visits by region does not add up to the total as some visitors stayed in more than one region. Please note caveats to data on slide 4.

# Quarterly Regions & Nations Headlines – Spend (£m)

Spend (£m)	Q1 2022	% change vs Q1 2019	Q2 2022	% change vs Q2 2019	Q3 2022	% change vs Q3 2019	YTD 2022	% change vs YTD 2019
London	1,564	-49%	3,539	-4%	4,199	-6%	9,302	-17%
Rest of England	904	-30%	1,999	-6%	3,211	-1%	6,114	-8%
North East	35	-11%	56	-33%	135	22%	225	-3%
North West	191	-31%	412	-9%	544	18%	1,147	-4%
Yorkshire	66	-11%	140	37%	175	-38%	380	-17%
West Midlands	82	-52%	210	17%	306	-30%	598	-24%
East Midlands	58	-13%	111	-5%	210	36%	379	12%
East Of England	109	-23%	244	-7%	386	5%	739	-4%
South West	127	-18%	305	-10%	515	-3%	947	-8%
South East	235	-36%	520	-13%	937	6%	1,692	-8%
Scotland	197	-4%	952	34%	1,407	34%	2,556	30%
Wales	47	-14%	102	-22%	150	-26%	299	-23%
<b>Total UK</b>	<b>2,731</b>	<b>-42%</b>	<b>6,661</b>	<b>-1%</b>	<b>9,052</b>	<b>-1%</b>	<b>18,444</b>	<b>-11%</b>

- Inbound spending from Q2 to Q3 2022 also grew in all nations and regions of the UK.
- Spending in **London** reached £4.2bn, in Q3 2022, down 6% on Q3 2019 (46% of inbound spend), bringing year-to-date (YTD) spend to £9.3bn, 17% below 2019 levels.
- By English region, the **South East**, **North West** and **South West** received the highest amount of spend in Q3 2022.
- Visitors to the **Rest of England** spent £3.2bn in Q3 2022 (35% of inbound spend), down 1% on Q3 2019, recovering at a slightly faster pace than London. YTD spend reached £6.1bn, 8% below YTD 2019.
- In Q3 2022, spend in Scotland grew to £1.4bn, up 34% on Q3 2019 (a new Q3 record).
- Visitors spent £150m in **Wales** in Q3 2022, down 26% on Q3 2019.

International Passenger Survey by the ONS 2019 & 2022. The spend by region does not add up to the total as we have not included Northern Ireland or nil night visitors. Please note caveats to data on slide 4. All values and percentage changes in spend are in nominal terms.

# Regions & Nations sample: 2022

Sample by Nation/Region	Q1 2022	Q2 2022	Q3 2022	YTD 2022
London	3,178	5,799	5,150	14,127
Rest Of England	3,202	4,333	4,357	11,892
North East	82	170	155	407
North West	661	994	972	2,627
Yorkshire	226	320	348	894
West Midlands	473	554	462	1,489
East Midlands	228	266	285	779
East Of England	450	520	585	1,555
South West	497	805	821	2,123
South East	804	1,195	1,325	3,324
Scotland	488	1,127	1,082	2,697
Wales	147	244	265	656
<b>Total UK</b>	<b>6,772</b>	<b>10,745</b>	<b>9,841</b>	<b>27,358</b>

- **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.



## 2. 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 **31<sup>st</sup> January 2023**. This data covers provisional Jan-Sept 2022 data but may be revised again for the annual 2022 release in summer 2023. Due to the impact of COVID-19 restrictions, there are some caveats to the data noted on slide 29.

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. Due in part to an unusual pattern of travellers and traveller behaviour as we recover from the pandemic, we are seeing wide variations in region/nation results, especially for spending. We advise caution when interpreting these results.

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).
- From 2021, data excludes the Irish land border data

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

# 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.
- **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 so data for this timeframe excludes those travelling via Eurotunnel. Eurotunnel data has been excluded from 2019 for Q1 and Q2 in order to make comparisons. The ONS restarted IPS interviews at all ports from July 2022. Please see our [2022 inbound page](#) for more information.

# 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