

Regional Quarterly Inbound Update & Full Year 2022

Q4 2022 and Full Year 2022

International Passenger Survey by the ONS

(Published 26th May 2023)



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1. Summary

Q4 2022 and Full Year 2022

Q4 and 2022 full year summary – UK Total

- **2022 Quarter 4:**
 - The UK welcomed **9.6 million** inbound visits in **Q4 (October-December) 2022**, down **7%** on the same period in 2019.
 - In **Q4 2022**, visitors spent **£7.7 billion** in the UK, **up 2%** compared to Q4 2019. Taking inflation into account, visitor spend was equivalent to £6.6bn in Q4 2019 prices, down 12% on Q4 2019.
- **2022 Full year:**
 - There were **31.2 million visits** to the UK during **2022**. This is an increase on results posted in the previous 2 years, but **24% behind** levels seen in 2019.
 - For 2022, spend was down 7% vs 2019 in real terms at £26.5 billion. Taking inflation into account, visitor spend would have been 17% below 2019 levels, equivalent to £23.5 billion in 2019 prices.



Q4 and 2022 full year summary – UK nations

London

- Inbound visits to London showed signs of recovery throughout 2022, peaking with 5.1 million visits in Q4 2022 (October to December), down 9% on Q4 2019. Visitor spending reached a new Q4 high in 2022 of £4.5 billion (3% up on Q4 2019).
- There were 16.1 million inbound visits to London in 2022 (down 26% in 2019 results). These visitors spent £14.1 billion in the capital city – 10% down on 2019 results.

Rest Of England

- Visits in Q4 2022 were just 2% behind October-December 2019 results (3.9 million visits). Inbound spending in Q4 2022 was up 3% on 2019 results, setting a new Q4 spend record of £2.4 billion.
- There were a total of 13.2 million visits to the Rest of England in 2022, 22% down compared to 2019. Visitors spent £8.5 billion in 2022, 6% below 2019 levels.

Scotland

- Scotland set new Q4 records for both visits and spend in Q4 2022. There were 850,000 visits between October – December 2022 spending a total of £680 million (up 1% and 19% respectively on the same period of 2019).
- In 2022, 3.2 million inbound visits were made to Scotland – 7% fewer than in 2019. Though visit numbers were down in 2022 (compared to 2019), visitor spending set a new January – December record of £3.2 billion (up 24% on 2019).

Wales

- Wales hosted 171,000 inbound visits in Q4 2022, 8% lower than the same period in 2019. Inbound visitors spent £95 million in Wales in Q4 2022, 74% of the total spent in the same period of 2019.
- Final 2022 figures reported a total of 686,000 inbound visits to Wales (33% down on 2019) and £391 million in spend (24% lower than in 2019).

Q4 and 2022 full year summary – English regions (1)

North East

- The North East welcomed 4% more visits in Q4 2022 (118,000) than they did in Q4 2019. These visitors spent £79 million during October-December 2022. This is the third highest Q4 spend, but down 42% compared to the record holding Q4 2019.
- In 2022 there were 478,000 inbound visits to the North East, 11% down on visit levels seen in 2019. A total of £311 million was spent in the region in 2022, down 16% compared to 2019.

North West

- There were 763,000 inbound visits to the North West in Q4 2022 - though down 19% on the record set in Q4 2019. Q4 2022 spending in the North West reached a new Q4 spend record of £532 million (up 26% compared to Q4 2019).
- International visitors made 2.7 million visits to the region in 2022, down 23% on the record set in 2019. There was a total of £1.7 billion spent in the region in 2022 – up 3% on 2019.

Yorkshire

- Inbound visits to Yorkshire set a new Q4 visit record in 2022 with 345,000 visits (up 8% on Q4 2019). Compared to the spending record set in Q4 2019, inbound visitor spend was down 14% at £153 million.
- Despite a record end to 2022, total visit numbers to Yorkshire in 2022 were 20% below 2019 levels at 1.1 million. Similarly, 2022 spend was also down (compared to 2019) at £533 million (down 16%).

West Midlands

- Visits to the West Midlands by overseas residents in 2022 were on par (down 1%) compared to Q4 2019 at 532,000. These visitors spent a total of £269 million in the region during October to December 2022, up 10% on the same period in 2019.
- Compared to a record 2019, West Midlands visits were down 32% with 1.6 million visits in 2022. While visitors spent £867 million in the region in 2022, this is 17% down compared to the record holding 2019.

Q4 and 2022 full year summary – English regions (2)

East Midlands

- The East Midlands hosted 272,000 inbound visits in Q4 2022, 12% fewer than they did in the same period of 2019. In the final quarter of 2022 visitors to the East Midlands spent a total of £135 million – 16% more than they did in the same quarter of 2019.
- There were 960,000 visits to the West Midlands in 2022, down 20% on 2019 results. Compared to 2019, total spending was higher in 2022 at £515 million (up 11% on 2019).

East of England

- East of England posted positive Q4 2022 results for both visits and spend, compared to 2019 - there were 586,000 visits (up 8%), spending £266 million (up 7%).
- The East of England hosted a little over 2 million international visits in 2022, 10% fewer than in 2019. Visitors spent a touch over £1 billion in the region, on par with 2019 results (just 1% below).

South West

- The South West finished 2022 on a high – setting new Q4 records for both visits and spend. There were 551,000 visits to the South West between October – December 2022 (up 13% on Q4 2019) who spent a new Q4 record of £332 million (up 28% on Q4 2019).
- Inbound visits to the South West were down 19% on 2019 results – though 2.1 million visits were made in 2022. Overall spending in the South West in 2022 was marginally down (2% below) 2019 results at £1.3 billion.

South East

- Just over 1 million visits were made to the South East in Q4 2022, though down 12% compared to Q4 2019. Compared to the record set in Q4 2019 inbound visitors spent 15% less than they did in the same period of 2019 (£584 million).
- Visits to the South East made by international visitors in 2022 were down 32% on 2019 results at 3.6 million. Visitors spent £2.3 billion in the region in 2022, 11% below the record spend set in 2019.

2. Latest full year: Inbound Nations and Regions

Full year 2022

2022 Headlines – Visits (000)

Visits (000)	2018	2019	2020	2021	2022	% change vs 2019
London	21,072	21,713	-	2,723	16,118	-26%
Rest Of England	16,336	16,937	-	3,244	13,197	-22%
North East	490	538	-	105	478	-11%
North West	3,256	3,449	-	709	2,656	-23%
Yorkshire	1,445	1,324	-	227	1,058	-20%
West Midlands	2,196	2,430	-	418	1,644	-32%
East Midlands	1,266	1,204	-	248	960	-20%
East Of England	2,265	2,267	-	549	2,049	-10%
South West	2,485	2,595	-	394	2,104	-19%
South East	5,162	5,394	-	845	3,641	-32%
Scotland	3,729	3,460	-	479	3,234	-7%
Wales	988	1,023	-	124	686	-33%
Total UK	40,283	40,857	11,101	6,384	31,244	-24%

- Inbound visits to all UK nations and regions didn't quite recover to 2019 levels in 2022.
- Of the 31.2 million inbound visit to the UK in 2022, London received a little over half (52%). This is in line with the proportions of visits received prior to COVID-19.
- The most visited England regions (excluding London) in 2022 were the South East (3.6 million visits), the North West (2.7 million visits) and the South West (2.1 million visits).
- Scotland posted the strongest recovery in 2022, compared to 2019 (though down 7%) at 3.2 million visits.
- Wales received 686,000 visits in 2022 – 33% below 2019 levels.

2022 Headlines – Spend (£m)

Spend (£m)	2018	2019	2020	2021	2022	% change vs 2019
London	£14,863	£15,725	-	£2,691	£14,133	-10%
Rest Of England	£8,262	£9,055	-	£2,329	£8,504	-6%
North East	£347	£369	-	£85	£311	-16%
North West	£1,553	£1,620	-	£492	£1,675	3%
Yorkshire	£652	£637	-	£178	£533	-16%
West Midlands	£957	£1,048	-	£278	£867	-17%
East Midlands	£559	£464	-	£149	£515	11%
East Of England	£752	£1,025	-	£321	£1,016	-1%
South West	£1,223	£1,308	-	£245	£1,287	-2%
South East	£2,205	£2,580	-	£581	£2,289	-11%
Scotland	£2,379	£2,538	-	£459	£3,151	24%
Wales	£433	£515	-	£66	£391	-24%
Total UK	£26,508	£28,448	£6,210	£5,646	£26,497	-7%

- While overall visits levels were 76% of that reported in 2019, spend has recovered at a faster pace. *Please note these figures do not account for inflation.*
- Inbound visitors spent 26.5 billion in the UK in 2022, 7% lower than the record set in 2019.
- Visitors to London spent £14 billion in the capital in 2022, 10% below the levels seen in 2019.
- Of the English regions (outside London) the East Midlands reported the highest visitor spend growth (11%) with a further 3 regions (North West, East Of England and South West) reporting visitor spend in line or just above 2019 levels (3%, -1% and -2%).
- Inbound visitors to Scotland in 2022 spent a record setting £3.2 billion. Visitors to Wales spent £391 million in 2022.

3. Latest quarter: Inbound Nations and Regions

Q4 2022 (October to December)

Regional Quarterly 2022 – Visits (000)

Visits (000)	Q1 2022	% change vs. Q1 2019	Q2 2022	% change vs. Q2 2019	Q3 2022	% change vs. Q3 2019	Q4 2022	% change vs. Q4 2019
London	1,849	-59%	4,254	-21%	4,870	-20%	5,145	-9%
Rest Of England	1,673	-49%	3,218	-26%	4,425	-17%	3,880	-2%
North East	46	-53%	138	-6%	176	-3%	118	4%
North West	333	-52%	703	-23%	856	-5%	763	-19%
Yorkshire	132	-47%	235	-22%	347	-24%	345	8%
West Midlands	223	-59%	400	-35%	490	-33%	532	-1%
East Midlands	135	-47%	207	-26%	345	-4%	272	-12%
East Of England	306	-28%	479	-12%	678	-10%	586	8%
South West	216	-47%	541	-22%	796	-21%	551	13%
South East	394	-57%	878	-39%	1,341	-28%	1,027	-12%
Scotland	255	-43%	775	-15%	1,355	7%	850	1%
Wales	73	-53%	184	-40%	259	-32%	171	-8%
Total UK	3,743	-55%	7,957	-23%	9,946	-16%	9,598	-7%

- Inbound tourism visits continued to recover throughout each quarter of 2022 (compared to the same time in 2019) – though some English regions had a few bumps along the way.
- In Q4 the UK welcomed 9.6 million inbound visitors, 7% fewer compared to Q4 2019.
- All UK nations and regions saw a peak in visitor numbers during the traditional summer quarter (Q3 – July to September) except London and the West Midlands where visit numbers peaked in Q4 (October-December) in 2022.
- Visits to Scotland in Q4 were on par (up 1%) compared to Q4 2019 at 850,000, whilst there were 171,000 visits to Wales in Q4, 8% fewer than in Q4 2019.

International Passenger Survey by the ONS. 2022 sample: Q1: 8,097; Q2: 12,934; Q3: 11,670 and Q4: 11,694. All values and percentage changes in spend are in nominal terms.

Regional Quarterly 2022 – Spend (£m)

Spend (£m)	Q1 2022	% change vs. Q1 2019	Q2 2022	% change vs. Q2 2019	Q3 2022	% change vs. Q3 2019	Q4 2022	% change vs. Q4 2019
London	£1,664	-47%	£3,750	1%	£4,197	-6%	£4,521	3%
Rest Of England	£918	-31%	£2,022	-8%	£3,210	-1%	£2,353	3%
North East	£41	7%	£56	-32%	£135	21%	£79	-42%
North West	£190	-32%	£410	-10%	£544	18%	£532	26%
Yorkshire	£65	-14%	£140	37%	£175	-38%	£153	-14%
West Midlands	£83	-51%	£209	7%	£306	-30%	£269	10%
East Midlands	£59	-20%	£111	-7%	£210	36%	£135	16%
East Of England	£112	-22%	£253	-5%	£386	5%	£266	7%
South West	£130	-26%	£309	-10%	£515	-3%	£332	28%
South East	£237	-38%	£532	-16%	£936	6%	£584	-15%
Scotland	£184	-12%	£881	24%	£1,407	34%	£680	19%
Wales	£45	-17%	£101	-23%	£150	-25%	£95	-26%
Total UK	£2,852	-41%	£6,847	-1%	£9,066	-1%	£7,732	2%

- Spend recovery in 2022 (compared to pre COVID-19 – 2019) gained momentum towards the later half of the year. *Please note these figures do not account for inflation.*
- Spending more than doubled in the North East and East Midlands in the second half of the year (July-December) compared to the first 6 months of the 2022.
- As was seen with visits, London’s inbound spend peaked in Q4 2022 (October – December) at £4.5 billion. All other nations and regions recorded their 2022 highs in Q3 (July-September).
- Scotland reported growth in inbound visitor spend in each of the final 3 quarters of 2022 (compared to 2019).
- Inbound visitor spending in Wales peaked in Q3 (July-September) at £150 million.

4. 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 **26th May 2023**. This data refers to 2022, and due to the impact of COVID-19 restrictions, there are some caveats to the data noted on slide 38. Please note the ONS will be pausing monthly publications for Jan-Mar 2023 so the next data release will be Q1 2023.

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).
- 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:

- **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

Important notice for interpreting data

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.
- **2021** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) in Q4 2021 due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for this quarter. Data for those travelling via Dover was only collected from Q3 2021. 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. The ONS has used passenger numbers to model the Eurotunnel data for Q1-Q2 2022. The ONS restarted IPS interviews at all ports from July 2022. Please see our [2022 inbound page](#) for more information.

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

Sample size

Visits (000)	Q1 2022	Q2 2022	Q3 2022	Q4 2022	2022
London	3,176	5,799	5,150	5,674	19,799
Rest Of England	3,199	4,333	4,357	3,623	15,512
North East	82	170	155	119	526
North West	661	994	972	813	3,440
Yorkshire	226	320	348	292	1,186
West Midlands	473	554	462	479	1,968
East Midlands	228	266	285	234	1,013
East Of England	450	520	585	469	2,024
South West	497	805	821	585	2,708
South East	801	1,195	1,325	976	4,297
Scotland	488	1,127	1,082	940	3,637
Wales	147	244	265	175	831
Total UK	8,097	12,934	11,670	11,694	44,395

- 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.

International Passenger Survey by the ONS 2022. TOTAL UK figures do not the sum of each region as visitors may visit more than one nation/region.

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Q4 2022 and Full Year 2022

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