

Nations & Regions: Quarterly Inbound Update

Q1 2023 (January to March)

International Passenger Survey by the ONS

(Published 20th July 2023)



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Explore the 2023 data in more detail on the [VisitBritain website](#).

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1. Summary

Q1 2023

Summary – UK nations

- **Total UK:** In Q1 2023, there were 7.7m inbound visits to the UK who spent a record setting £5.6bn, up 17% vs Q1 2019 (in nominal terms). In real terms, visitors spent £4.7bn in Q1 2019 prices (down 2% vs 2019).
- **London:** London received just over half of visits in Q1 2023 (55%) at 4.2m. These visitors spent a record £3.4bn in Q1, up 7% vs 2019, contributing to 60% of the total UK spend.
- **Rest of England:** Visits to the Rest of England totalled 3.1m visits (down 6% vs 2019). Spend from these visitors accounted for 32% of the total spend, totalling at £1.8bn, 32% higher than Q1 2019.
 - The **North West** and **East of England** saw visits surpass pre-pandemic levels in Q1 2023.
 - The most visited English regions in the Rest of England were the **South East** (779,000), **North West** (742,000; a new record) and **East of England** (482,000).
 - Spend set new records in the **North East, North West, Yorkshire** and **East Midlands**.
 - Of the English regions (outside London), the **South East** (£410m), **North West** (£368m; a new record) and **East of England** (£254m) received the highest amount of spend.
- **Scotland:** Visits continued to post strong recovery in Scotland in Q1 2023 at 572,000 visits, up 29% vs 2019. Spend reached £359m, just shy of the 2018 record (up 71% vs Q1 2019).
- **Wales:** Wales received 151,000 inbound visits, down 4% vs Q1 2019 whilst spend totalled at £67m, up 23% vs 2019.

2. Latest full year: Inbound Nations and Regions

Q1 2023

Q1 2023 Headlines – Visits (000)

Visits (000)	Q1 2023	% change vs Q1 2019	% change vs Q1 2022
Total England	6,956	-7%	104%
London	4,195	-8%	127%
Rest Of England	3,086	-6%	84%
North East*	62	-36%	35%
North West	742	8%	123%
Yorkshire	243	-3%	84%
West Midlands	415	-23%	86%
East Midlands	228	-10%	69%
East Of England	482	13%	57%
South West	354	-13%	63%
South East	779	-15%	98%
Scotland	572	29%	125%
Wales	151	-4%	107%
Total UK	7,692	-8%	105%

- Inbound visits to the **North West, East of England** and **Scotland** recovered to more than pre-pandemic levels (Q1 2019) in Q1 2023.
- Of the 7.7m inbound visits to the UK from January to March 2023, **London** received just over half (55%) which was in line with the proportion of visits received prior to the pandemic. The **Rest of England** received 3.1m visits, down 6% on 2019.
- The most visited English regions (after London) were the **South East** (779,000), **North West** (742,000; a new record) and **East of England** (482,000).
- **England** overall welcomed 7.0m visits in the first quarter, down 7% vs 2019.
- **Scotland** continued to post the strongest recovery into Q1 2023 (up 29% vs 2019) with 572,000 visits.
- **Wales** received 151,000 visits in Q1 2023, down 4% vs 2019.
- **London, Scotland** and the **North West** have made the strongest recovery vs the previous year, Q1 2022.
- [See the latest 2023 forecast on our website.](#)

International Passenger Survey by the ONS 2019, 2022 & 2023. See notes on 2022 data on slide 10. Total UK Sample Q1 2023: 9,190. *Low sample size (see slide 11). UK figures do not the sum of each region as visitors may visit more than one nation/region.

Q1 2023 Headlines – Spend (£m)

Spend (£m)	Q1 2023	% change vs Q1 2019	% change vs Q1 2022
Total England	£5,122	15%	98%
London	£3,356	7%	102%
Rest Of England	£1,766	32%	92%
North East*	£71	82%	71%
North West	£368	32%	94%
Yorkshire	£131	75%	103%
West Midlands	£190	11%	127%
East Midlands	£133	80%	125%
East Of England	£254	77%	127%
South West	£204	16%	56%
South East	£410	7%	73%
Scotland	£359	71%	95%
Wales	£67	23%	48%
Total UK	£5,625	17%	97%

- Spend continued to recover at a faster pace than visits into Q1 2023, exceeding pre-pandemic levels by 17% at a record £5.6bn. New records were set for England, London, Rest of England, North East, North West, Yorkshire and East Midlands. *Please note these figures do not account for inflation.*
- Inbound spend in **London** accounted for 60% of the total UK spend, reaching a record £3.4bn in Q1 2023, 7% above Q1 2019. Those visiting the **Rest of England** accounted for 32% of the total spend, totalling at a record £1.8bn, 32% higher than Q1 2019.
- Of the English regions (outside London), the **South East** (£410m), **North West** (£368m; a new record) and **East of England** (£254m) received the highest amount of spend.
- Visitors to **England** spent a record setting £5.1bn, up 15% vs Q1 2019.
- In **Scotland**, spend reached £359m (up 71% vs Q1 2019) just shy of the 2018 record of £365m.
- **Wales** received £67m from inbound visitors, up 23% vs Q1 2019.
- **West Midlands, East of England and East Midlands** made the strongest recovery for spend vs Q1 2022.

International Passenger Survey by the ONS 2019, 2022 & 2023. See notes on 2022 data on slide 10. Total UK Sample Q1 2023: 9,190. *Low sample size (see slide 11). All values and percentage changes in spend are in nominal terms unless otherwise specified.

3. 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 **20th July 2023**. The report covers quarter 1 in 2023. Comparisons have been made to 2019 to show the rate of recovery, and also 2022 to show growth coming out of the pandemic.

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 2023
London	3,882
Rest Of England	3,137
North East	68
North West	814
Yorkshire	218
West Midlands	527
East Midlands	241
East Of England	358
South West	407
South East	720
Scotland	605
Wales	253
Total UK	9,910

- **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.

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