

Monthly Inbound Update

Provisional July 2023

International Passenger Survey by the ONS

(Published 27th October 2023)



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1. Summary

Provisional July 2023

Summary – July 2023 (provisional)

- **Visits: visits continued to increase month-on-month into July 2023**
 - Inbound visits to the UK into July 2023 continued to increase reaching **3.9m visits**, down 7% vs July 2019 (and up 13% vs July 2022).
 - Visits across the last 3 months and year-to-date have reached similar recovery levels vs 2019; May-July saw visits reach 10.6m, down 6% vs 2019 (and up 16% vs 2022) and visits across 2023 so far totalled at 21.5m visits, down 6% vs 2019 (and up 42% vs 2022).
- **Spend: spend in July 2023 was the second highest July on record, in nominal terms**
 - Spend also increased into July 2023 with inbound visitors spending **£3.4bn** in the UK, up 11% (in nominal terms) vs July 2019 (and up 5% vs 2022).
 - In real terms, July 2023 saw visitors spend £2.8bn in July 2019 prices, down 9% vs July 2019.
 - It was a record last 3 months (May-July) with visitors spending £9.0bn and record year-to-date (January-July) with visitors spending £17.0bn – both in nominal terms.
 - Inbound visitors **spent £881 per visit**, on average, in July 2023, up 19% (in nominal terms) vs 2019 (and down 7% vs 2022). In real terms, visitors spent £727 in July 2019 prices, down 2% vs 2019.

Summary – July 2023 (provisional)

- **Journey purpose: Holidays reach pre-pandemic levels, VFR continues to grow and Business lags behind**
 - **Holiday** visits continued to increase month-on-month, accounting for 48% of all inbound visits in July 2023. There were 1.9m holiday visits in July 2023, recovering to pre-pandemic levels (July 2019).
 - **Visits to friends and relatives** (VFR) surpassed 2019 levels in July to 1.2m visits, up 2% vs July 2019, just shy of the 1.25m record in July 2017. VFR visits accounted for 31% of total inbound visits in the latest month and reached new records for the last 3 months (May-July) at 3.3m visits and year-to-date at 7.2m visits.
 - **Business** visits saw a slight drop in July 2023 to 520,000 visits, down 28% vs 2019 and down 1% vs 2022.
 - All other visits under **'miscellaneous'**, which includes study, contributed 290,000 visits in July 2023, down 22% vs 2019 and up 7% vs 2022. However, year-to-date figures show misc visits have recovered to 1% above 2019 levels.
- **Global region: North America sees a slight dip in visits and Europe see's a strong month nearing 2019 levels**
 - The UK welcomed 2.4m visits from **Europe** in July 2023, down 4% vs July 2019 and up 15% vs 2022. Year-to-date visits have reached 14.1m, down 9% vs 2019. There were 1.7m visits from **EU15**, down 5% vs 2019 and up 16% vs 2022 whilst visits from **Other EU** markets reached a record 400,000 visits in July 2023.
 - After a few record setting months, visits from **North America** dipped slightly in July to 730,000 visits. Visits were up 5% vs 2019 but were down 8% vs 2022.
 - Those visiting from the **Rest of World** contributed 790,000 visits to UK inbound tourism down 21% vs 2019 but were up 32% vs 2022.

2. Latest monthly inbound UK

Provisional July 2023

Monthly Headlines – July 2023 (provisional)

Total Visits (000)	2023	Change vs. 2019	Change vs. 2022
July 2023	3,880	-7%	13%
Last 3 months (May-Jul 2023)	10,644	-6%	16%
Year to date (Jan-Jul 2023)	21,453	-6%	42%

Total Spend (£m)	2023	Change vs. 2019	Change vs. 2022
July 2023	3,420	11%	5%
Last 3 months (May-Jul 2023)	8,994	10%	9%
Year to date (Jan-Jul 2023)	16,944	15%	31%

- **Visits:** Inbound visits to the UK into July 2023 continued to increase reaching **3.9m visits**, down 7% vs July 2019 (and up 13% vs July 2022). Visits across the last 3 months and year-to-date have reached similar recovery levels vs 2019; May-July saw visits reach 10.6m, down 6% vs 2019 (and up 16% vs 2022) and visits across 2023 so far totalled at 21.5m visits, down 6% vs 2019 (and up 42% vs 2022).
- **Spend:** Spend also increased into July 2023 with inbound visitors spending **£3.4bn** in the UK (in nominal terms), up 11% vs July 2019 (and up 5% vs 2022). This was the second highest July on record, just shy of the £3.5bn record in July 2017. In real terms, July 2023 saw visitors spend £2.8bn in July 2019 prices, down 9% vs July 2019. It was a record last 3 months (May-July) with visitors spending £9.0bn and record year-to-date (January-July) with visitors spending £17.0bn – both in nominal terms.
- **Spend per visit:** Inbound visitors **spent £881 per visit** on average, in July 2023, up 19% (in nominal terms), vs 2019 (and down 7% vs 2022). In real terms, visitors spent £727 in July 2019 prices, down 2% vs 2019.

International Passenger Survey by the ONS 2019, 2022 and 2023P (P indicates provisional data). All values and percentage changes in spend are in nominal terms unless otherwise specified. Sample sizes at the monthly level for some analysis and comparisons can be low and results should be treated with caution, especially for spending.

Monthly Journey Purpose – July 2023 (provisional)

Total Visits (000)	July 2023	Change vs. 2019	Change vs. 2022	Last 3 months (May-Jul 2023)	Change vs. 2019	Change vs. 2022	Year to date (Jan-Jul 2023)	Change vs. 2019	Change vs. 2022
Holiday	1,860	0%	25%	4,899	-1%	25%	9,020	-3%	57%
VFR	1,210	2%	4%	3,317	3%	5%	7,176	5%	25%
Business	520	-28%	-1%	1,684	-27%	17%	3,628	-28%	39%
Miscellaneous	290	-22%	7%	743	-9%	20%	1,631	1%	55%

- **Holiday** visits continued to increase month-on-month, accounting for 48% of all inbound visits in July 2023. There were 1.9m holiday visits in July 2023, recovering to pre-pandemic levels (July 2019). Year-to-date (January to July) holiday visits reached 9.0m, down 3% vs 2019.
- **Visits to friends and relatives (VFR)** surpassed 2019 levels in July to 1.2m visits, up 2% vs July 2019, just shy of the 1.25m record in July 2017. VFR visits accounted for 31% of total inbound visits in the latest month and reached new records for the last 3 months (May-July) at 3.3m visits and year-to-date at 7.2m visits.
- **Business** visits saw a slight drop in July 2023 vs April-June to 520,000 visits, down 28% vs 2019 and down 1% vs 2022. Across the last 3 months and year-to-date, business visits were down -27% and -28% vs 2019, respectively.
- All other visits under '**miscellaneous**', which includes study, contributed 290,000 visits in July 2023, down 22% vs 2019 and up 7% vs 2022. However, year-to-date figures show misc visits have recovered to 1% above 2019 levels.

International Passenger Survey by the ONS 2019, 2022 and 2023P (P indicates provisional data). Sample sizes at the monthly level for some analysis and comparisons can be low and results should be treated with caution, especially for spending.

Monthly Global Region – July 2023 (provisional)

Total Visits (000)	July 2023	Change vs. 2019	Change vs. 2022	Last 3 months (May-Jul 2023)	Change vs. 2019	Change vs. 2022	Year to date (Jan-Jul 2023)	Change vs. 2019	Change vs. 2022
Total Europe	2,360	-4%	15%	6,401	-7%	14%	14,065	-9%	40%
→ EU	2,120	-3%	18%	5,784	-8%	15%	12,742	-9%	40%
→ EU15	1,720	-5%	16%	4,690	-9%	12%	10,357	-10%	38%
→ Other EU	400	4%	25%	1,094	-3%	28%	2,387	-7%	52%
→ Rest of Europe	240	-9%	-4%	617	-6%	8%	1,321	-4%	33%
North America	730	5%	-8%	2,184	14%	7%	3,677	17%	32%
Rest of World	790	-21%	32%	2,059	-17%	37%	3,712	-15%	62%

- The UK welcomed 2.4m visits from **Europe** in July 2023, down 4% vs July 2019 and up 15% vs 2022. Year-to-date visits have reached 14.1m, down 9% vs 2019. There were 1.7m visits from **EU15**, down 5% vs 2019 and up 16% vs 2022 whilst visits from **Other EU** markets reached a record 400,000 visits in July 2023.
- After a few record setting months, visits from **North America** dipped slightly in July to 730,000 visits. Visits were up 5% vs 2019 but were down 8% vs 2022.
- Those visiting from the **Rest of World** contributed 790,000 visits to UK inbound tourism down 21% vs 2019 but were up 32% vs 2022.

International Passenger Survey by the ONS 2019, 2022 and 2023P (P indicates provisional data). Sample sizes at the monthly level for some analysis and comparisons can be low and results should be treated with caution, especially for spending.

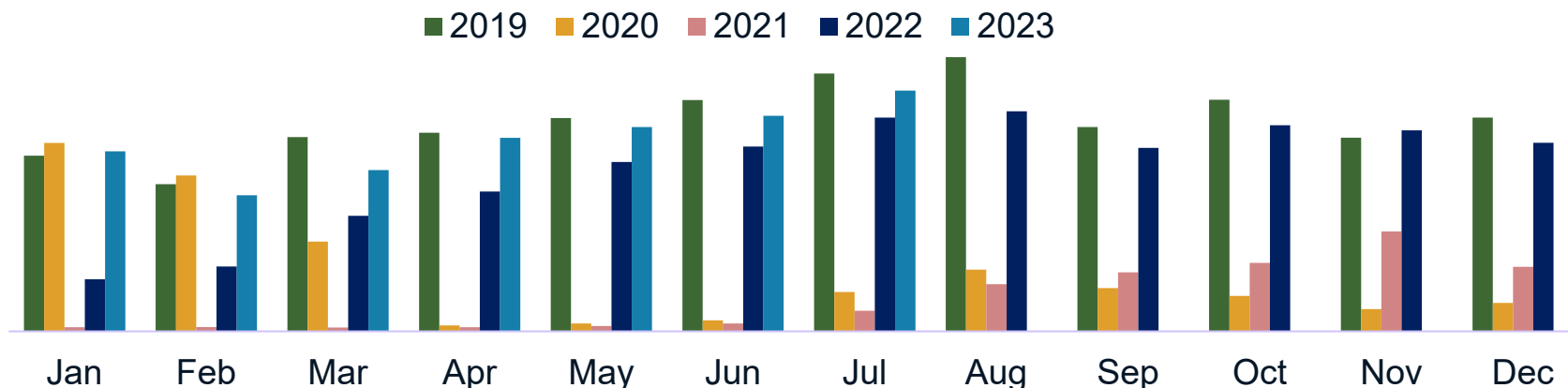
3. Detailed monthly trends

Provisional July 2023

Detailed monthly trends - visits

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - Total Visits (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	2,830	2,372	3,129	3,199	3,438	3,727	4,155	4,418	3,292	3,731	3,121	3,445
2020	3,036	2,512	1,446	95	127	176	633	993	696	570	358	458
2021	65	69	61	65	86	126	331	759	949	1,103	1,610	1,039
2022	839	1,045	1,860	2,252	2,728	2,977	3,445	3,545	2,956	3,322	3,238	3,038
2023	2,900	2,193	2,598	3,118	3,292	3,472	3,880					

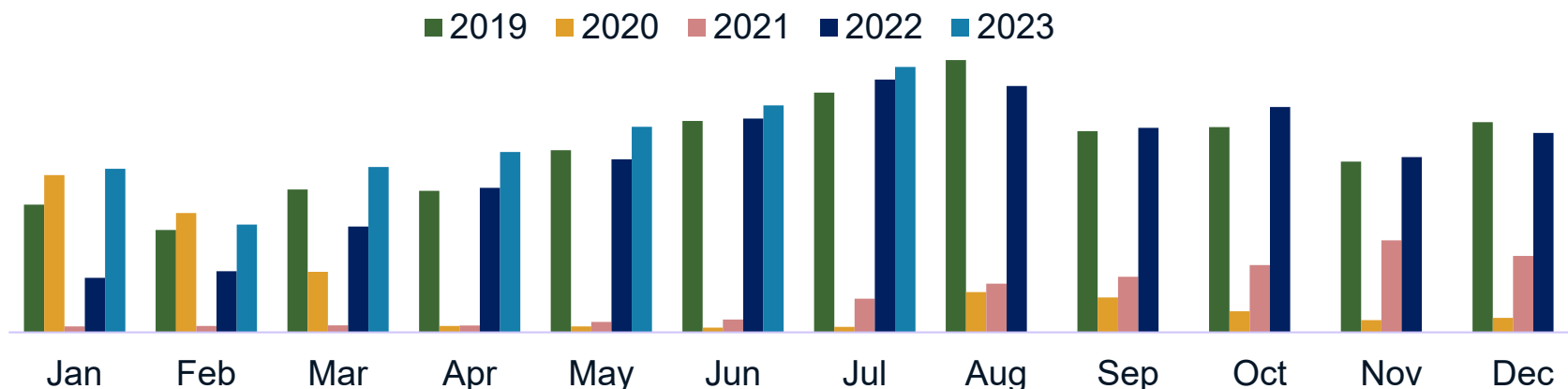
Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.

Long term trends showing percentage change year-on-year by quarter and more is available here.

Detailed monthly trends - spend

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - Total Spend (£m)
Source: Office for National Statistics, International Passenger Survey



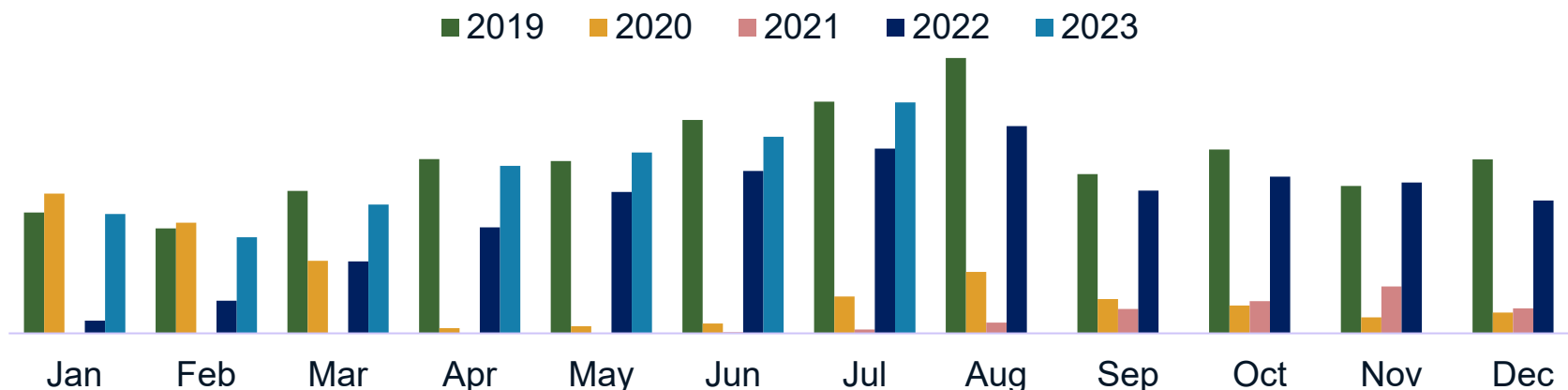
Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	1,646	1,318	1,840	1,824	2,347	2,725	3,090	3,510	2,593	2,645	2,201	2,708
2020	2,026	1,538	780	82	75	61	69	519	448	270	156	185
2021	76	82	89	87	134	165	433	626	716	867	1,186	985
2022	702	787	1,363	1,863	2,229	2,755	3,257	3,174	2,635	2,905	2,258	2,570
2023	2,107	1,388	2,130	2,325	2,649	2,925	3,420					

Note: Spending in million pounds. Monthly data is replaced by the more accurate Quarterly data.
Long term trends showing percentage change year-on-year by quarter and more is available [here](#).

Detailed monthly trends – journey purpose - holiday

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - Holiday Visits (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	973	844	1,147	1,403	1,388	1,718	1,866	2,217	1,282	1,480	1,187	1,401
2020	1,125	891	584	42	57	79	296	495	275	224	128	167
2021	1	3	3	2	3	8	30	86	196	259	377	201
2022	102	262	579	853	1,138	1,307	1,488	1,669	1,149	1,262	1,215	1,070
2023	961	774	1,037	1,349	1,456	1,583	1,860					

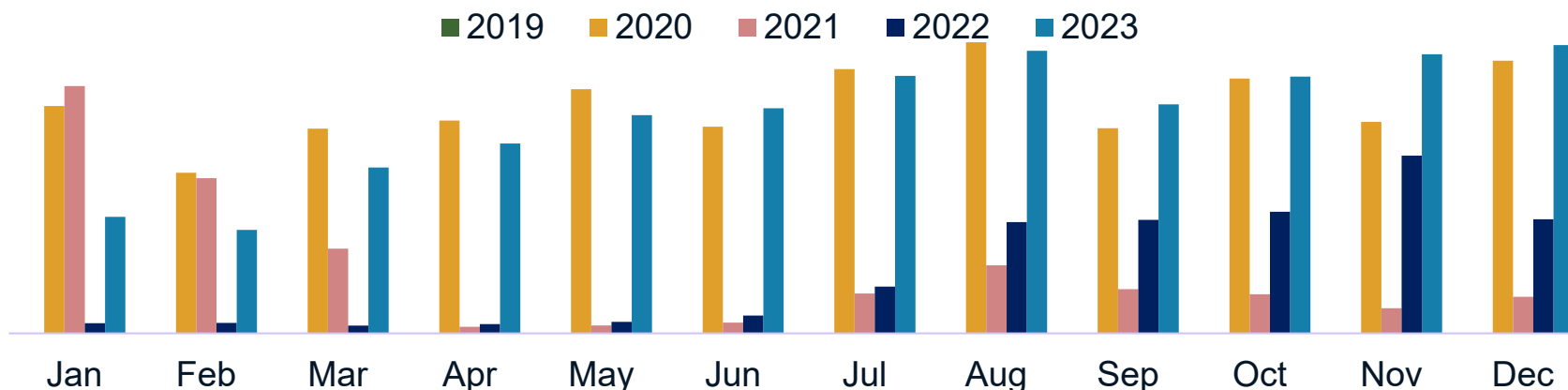
Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.

Long term trends showing percentage change year-on-year by quarter and more is available [here](#).

Detailed monthly trends – journey purpose - VFR

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - VFR Visits (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	1,025	724	923	960	1,101	932	1,192	1,313	925	1,149	954	1,230
2020	1,115	700	382	29	35	48	180	307	199	176	113	165
2021	46	47	35	41	52	80	211	501	512	548	802	515
2022	525	466	748	856	984	1,015	1,161	1,274	1,033	1,158	1,259	1,300
2023	1,254	760	843	1,002	1,027	1,080	1,210					

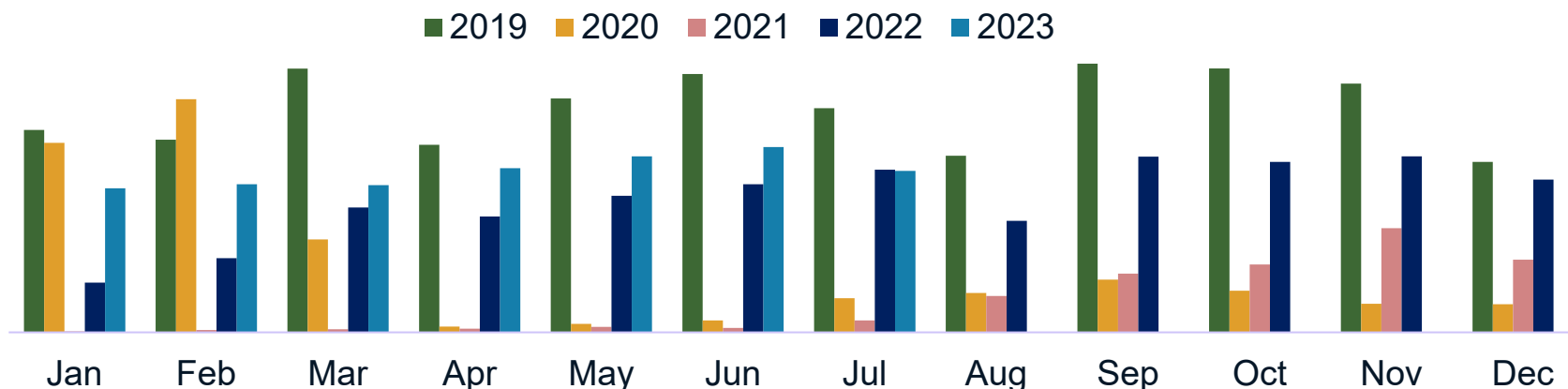
Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.

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Detailed monthly trends – journey purpose - business

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - Business Visits (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	652	621	850	604	754	832	722	569	866	850	801	549
2020	610	751	299	19	27	38	110	127	170	134	92	90
2021	3	7	10	12	18	14	38	117	189	218	335	234
2022	160	239	402	373	440	477	524	359	566	549	567	492
2023	464	477	474	529	567	597	520					

Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.

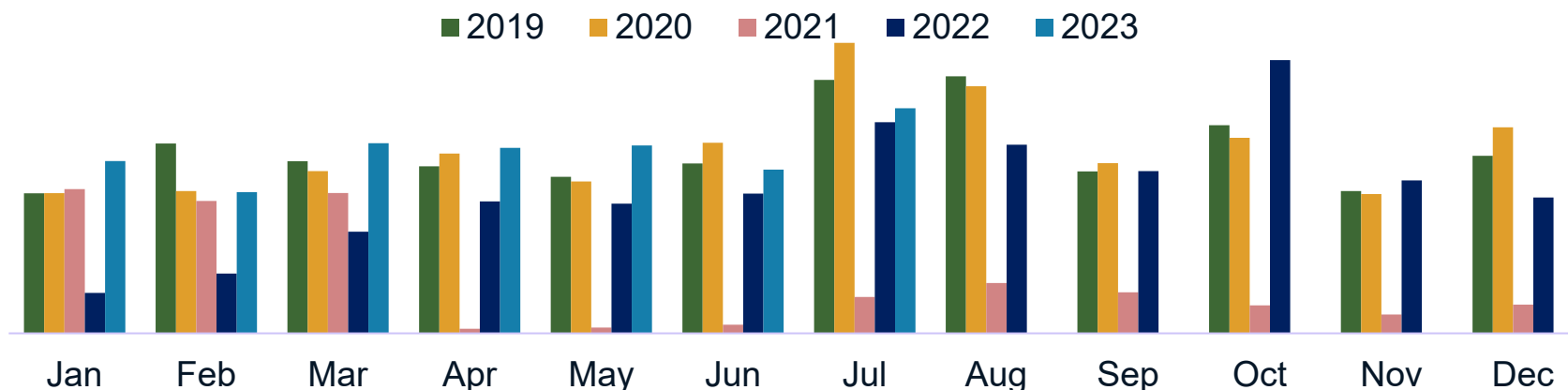
Long term trends showing percentage change year-on-year by quarter and more is available [here](#).

Detailed monthly trends – journey purpose - misc

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - Miscellaneous (includes short-term study, 000)

Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	180	245	222	215	202	219	327	331	209	268	183	229
2020	181	183	209	232	196	246	374	318	219	252	179	265
2021	186	170	181	6	7	11	47	65	53	36	24	37
2022	52	77	131	170	167	180	272	243	209	352	197	175
2023	222	182	245	239	242	211	290					

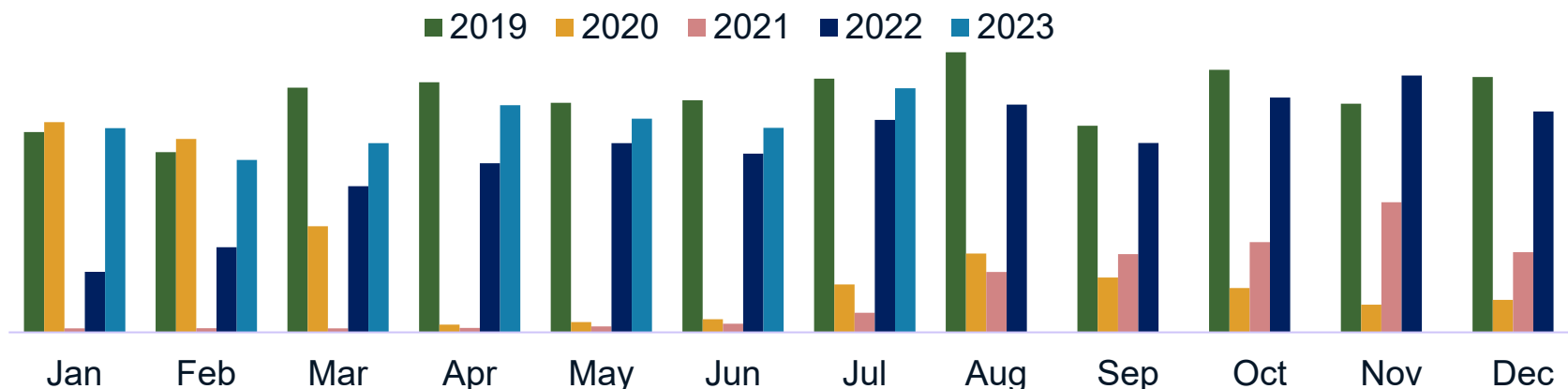
Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.

Long term trends showing percentage change year-on-year by quarter and more is available [here](#).

Detailed monthly trends – global regions - Europe

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from Europe (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	1,936	1,742	2,365	2,417	2,219	2,243	2,453	2,707	1,996	2,537	2,209	2,469
2020	2,032	1,869	1,025	74	98	126	463	761	529	429	267	313
2021	38	39	38	43	57	83	189	584	756	871	1,258	775
2022	584	823	1,413	1,634	1,828	1,727	2,053	2,202	1,830	2,269	2,483	2,135
2023	1,973	1,666	1,829	2,196	2,065	1,976	2,360					

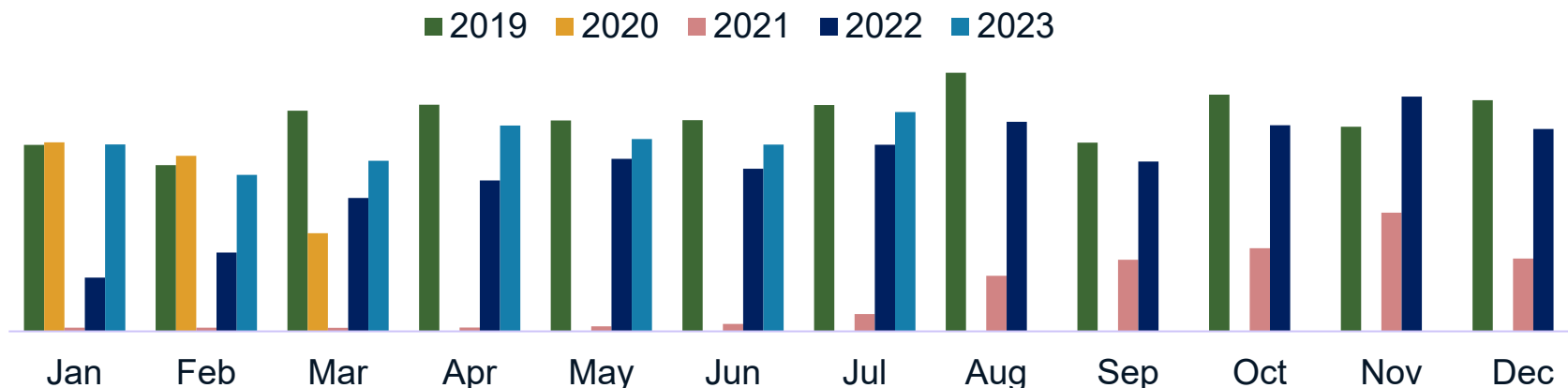
Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.

Long term trends showing percentage change year-on-year by quarter and more is available here.

Detailed monthly trends – global regions - EU

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from EU (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	1,803	1,607	2,133	2,192	2,039	2,041	2,188	2,499	1,825	2,289	1,978	2,235
2020	1,827	1,697	948									
2021	35	35	34	37	48	72	167	537	691	803	1,147	703
2022	520	761	1,289	1,459	1,668	1,572	1,804	2,026	1,642	1,993	2,270	1,956
2023	1,807	1,512	1,649	1,990	1,859	1,805	2,120					

Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.

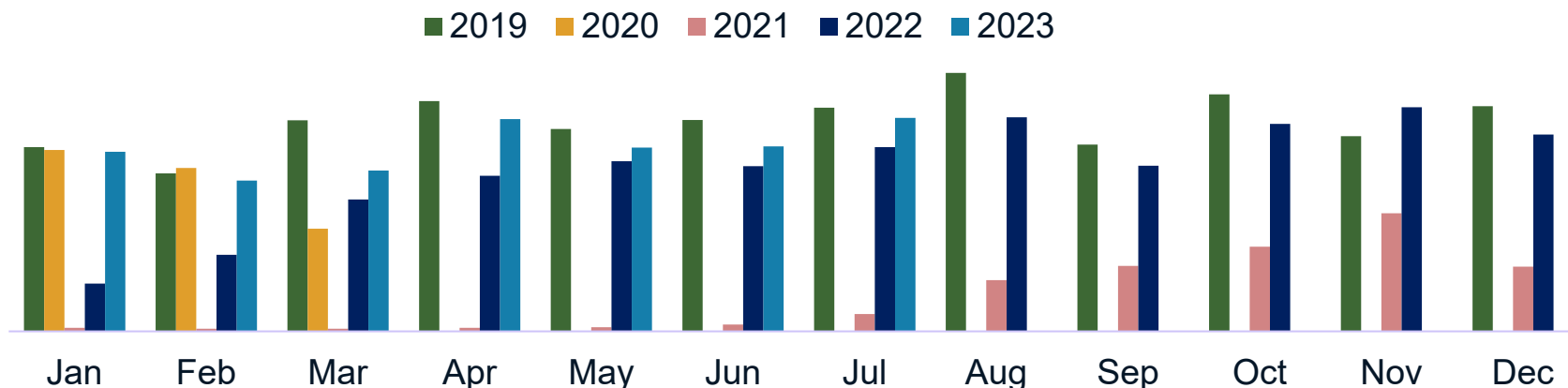
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International Passenger Survey by the ONS - 2023 data is provisional. No data monthly data is available April – December 2020, due to the impact of COVID. See slide 28.

Detailed monthly trends – global regions – EU15

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from EU15 (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	1,483	1,272	1,701	1,854	1,630	1,703	1,802	2,083	1,505	1,910	1,572	1,814
2020	1,461	1,316	826									
2021	28	21	21	28	33	55	139	412	527	682	951	521
2022	385	617	1,062	1,253	1,370	1,330	1,484	1,725	1,334	1,671	1,805	1,586
2023	1,446	1,215	1,296	1,710	1,480	1,490	1,720					

Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.

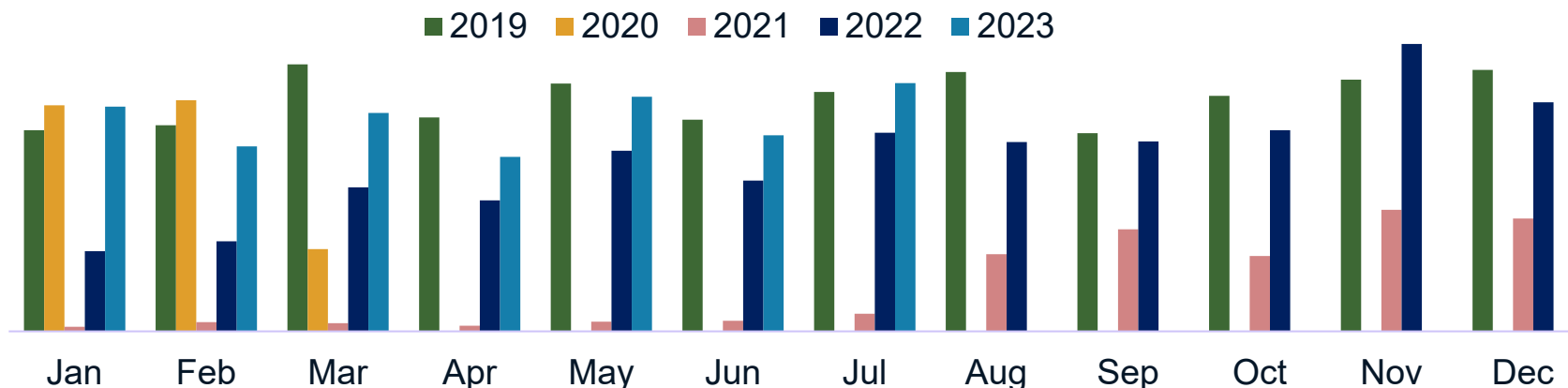
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Detailed monthly trends – global regions – EU Other

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from EU Other (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	324	332	430	345	399	341	386	418	319	380	405	421
2020	364	372	132									
2021	7	15	13	9	16	17	28	124	164	121	196	182
2022	129	145	232	211	291	243	320	305	306	324	463	369
2023	362	298	352	281	378	316	400					

Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.

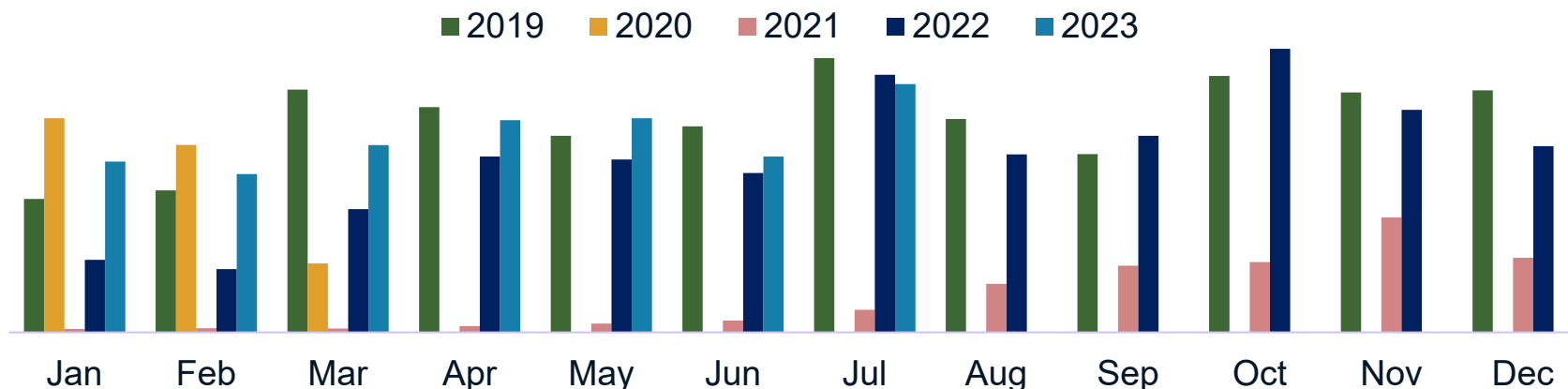
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Detailed monthly trends – global regions – Rest of Europe

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from Rest of Europe (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	129	137	235	218	190	199	265	206	172	248	232	234
2020	207	181	67									
2021	3	4	4	6	8	11	22	47	64	68	111	72
2022	70	61	119	170	167	154	249	172	190	274	215	180
2023	165	153	181	205	207	170	240					

Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.

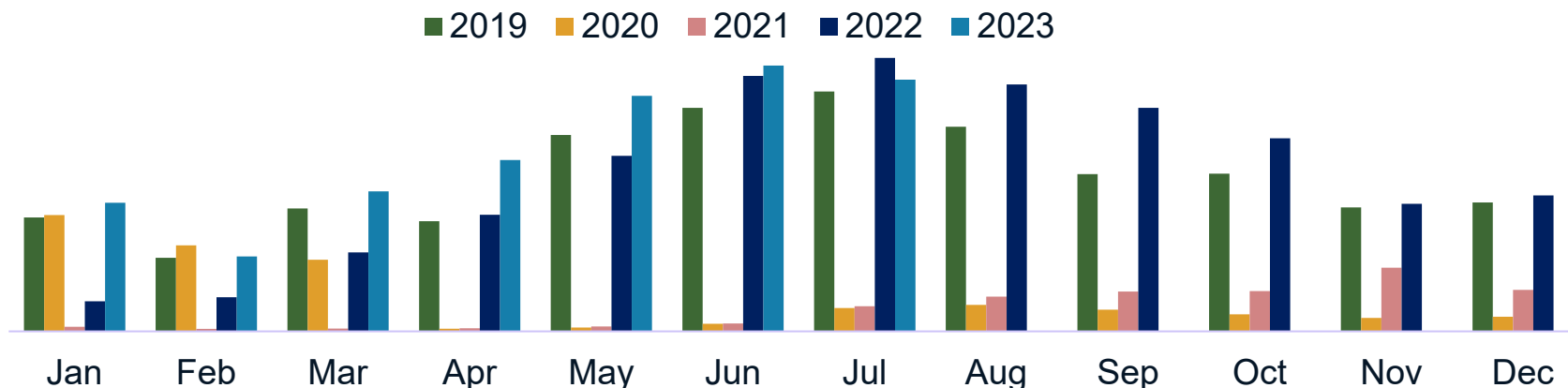
Long term trends showing percentage change year-on-year by quarter and more is available [here](#).

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Detailed monthly trends – global regions – North America

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from North America (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	330	213	356	319	570	648	696	593	456	457	360	374
2020	337	249	208	7	11	22	67	77	63	49	39	42
2021	13	7	8	9	14	23	73	101	115	116	185	120
2022	87	99	229	338	509	741	793	716	648	560	370	394
2023	373	217	406	497	683	771	730					

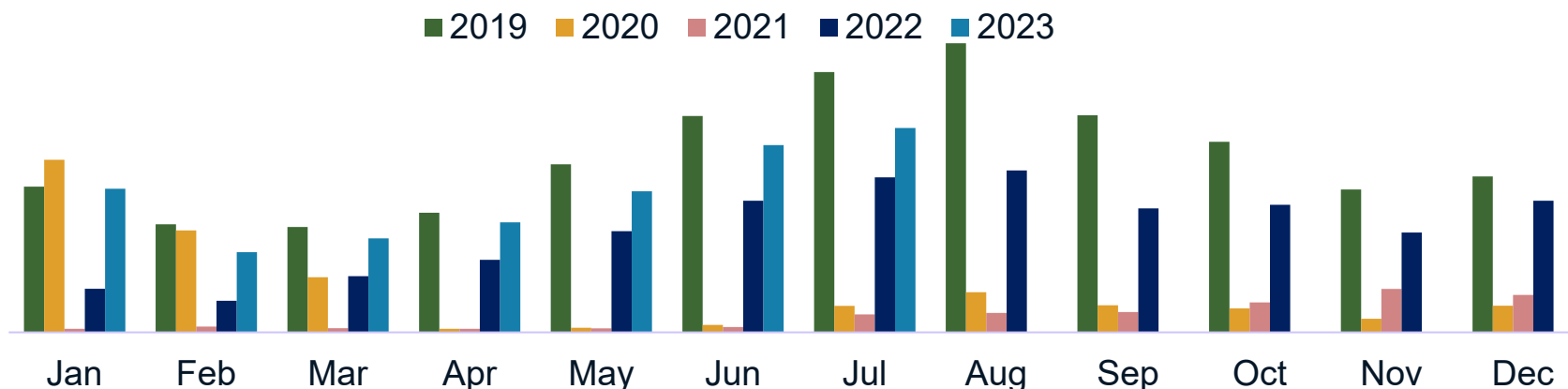
Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.

Long term trends showing percentage change year-on-year by quarter and more is available here.

Detailed monthly trends – global regions – Rest of World

please see notes on slide 26 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK - to the UK from Rest of World (000)
Source: Office for National Statistics, International Passenger Survey



Years	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	563	418	407	462	650	836	1,006	1,118	840	737	552	602
2020	667	394	213	13	17	29	102	155	105	92	52	103
2021	13	22	16	14	15	20	69	75	78	116	168	144
2022	168	122	217	280	391	509	599	626	479	493	386	509
2023	555	310	363	425	545	724	790					

Note: Visits in thousands. Monthly data is replaced by the more accurate Quarterly data.
Long term trends showing percentage change year-on-year by quarter and more is available here.

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 **27th October 2023**. The report covers provisional July 2023 data. 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 monthly level and 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.

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. 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.
- **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](#)

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

Monthly Inbound Update

Provisional July 2023

International Passenger Survey by the ONS

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