Nations & Regions: Quarterly Inbound Update

Provisional Q3 2023 (July to September)

International Passenger Survey by the ONS

(Published 24th January 2023)

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1. Summary

Provisional Q3 2023

Summary – UK nations and regions

- **Recovery of visits plateaued at the total UK level whilst spend was up in nominal terms but down in real terms:**
  - → **Total UK:** During Jul-Sep 2023, the UK welcomed 10.9m inbound visits, down 8% vs Q3 2019. Visitors spent £10.1bn in Q3 2023, 10% higher vs Q3 2019 (in nominal terms). This was the second highest Q3 on record (behind Q3 2017).

- **England and Wales recovered at a similar rate, still behind 2019, whilst Scotland continued to surpass 2019:**
  - → **England**: Overall, England welcomed 9.4m visits in Q3, down 10% vs Q3 2019 with visitors spending £8.2bn in **England,** up 7% vs Q3 2019.
  - → **London:** London received 5.4m visits (-12% vs Q3 2019). Visitors spent £4.7bn in Q3 2023 (up 7% vs 2019).
  - → The **Rest of England** received 4.7m visits (-13% vs Q3 2019) and spent a record £3.5bn (up 10% vs 2019).
  - → **North West** led the recovery rate vs 2019 for visits in both Q3 and year to date, with **West Midlands** lagging.
  - → In both year to date and Q3, **London** and **Rest of England** are displaying similar recovery rates vs 2019 for visits and spend.
  - → **Scotland:** Scotland continued to post the strongest recovery into Q3 2023 (up 14% vs Q3 2019) with 1.4m visits. Spend reached a record £1.5bn (up 43% vs Q3 2019).
  - → **Wales:** Wales received 348,000 visits in Q3 2023, down 8% vs Q3 2019 whilst spend reached a record £201m in Q3 2023, just above 2019.

International Passenger Survey by the ONS 2019 and 2023. All values and percentage changes in spend are in nominal terms unless otherwise specified. Image: ©VisitBritain.

2. Latest inbound Nations and Regions

Provisional Q3 2023

Q3 2023 Headlines – Visits (000)

Visits (000)	Q1 2023P	% change vs Q1 2019	Q2 2023P	% change vs Q2 2019	Q3 2023P	% change vs Q3 2019	Year-to-date 2023P	% change vs YTD 2019
Total England	6,956	-7%	8,619	-5%	9,379	-10%	24,954	-8%
London	4,195	-8%	5,315	-1%	5,415	-12%	14,926	-7%
Rest Of England	3,086	-6%	3,877	-11%	4,652	-13%	11,614	-10%
North East	62**	-36%	117	-20%	184	1%	363	-15%
North West	742	8%	840	-8%	940	4%	2,521	0%
Yorkshire	243	-3%	302	0%	351	-23%	896	-11%
West Midlands	415	-23%	489	-21%	553	-25%	1,457	-23%
East Midlands	228	-10%	273	-3%	344	-4%	844	-6%
East Of England	482	13%	581	6%	599	-20%	1,662	-4%
South West	354	-13%	609	-12%	942	-7%	1,905	-10%
South East	779	-15%	1,095	-24%	1,463	-22%	3,337	-21%
Scotland	572	29%	1,163	27%	1,438	14%	3,173	21%
Wales	151	-4%	252	-17%	348	-8%	750	-10%
Total UK	7,692	-8%	9,882	-5%	10,869	-8%	28,443	-7%

- Of the 10.9m inbound visits to the UK from July to September 2023, **London** received half (50%) at 5.4m visits (-12% vs Q3 2019). The **Rest of England** received 43% of inbound visits at 4.7m (-13% vs Q3 2019). **England** overall welcomed 9.4m visits in Q3, down 10% vs Q3 2019.
- The most visited English regions (after London) were the **South East** (1.5m), **South West** (942,000), **North West** (940,000) and **East of England** (599,000).
- **Scotland** continued to post the strongest recovery into Q3 2023 (up 14% vs Q3 2019) with 1.4m visits.
- **Wales** received 348,000 visits in Q3 2023, down 8% vs Q3 2019.
- Year-to-date figures show visits to the North West are on par with 2019 whilst Scotland is above 2019 levels. Other nations and regions are behind to varying degrees.
- See the latest forecast on our website.

International Passenger Survey by the ONS 2019, 2022 & 2023. See notes on 2022 data on slide 10. See sample on slide 11. UK figures do not the sum of each region as visitors may visit more than one nation/region. **Caution, low base sizes.

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Q3 2023 Headlines – Spend (£m)

Spend (£m)	Q1 2023P	% change vs Q1 2019	Q2 2023P	% change vs Q2 2019	Q3 2023P	% change vs Q3 2019	Year-to-date 2023P	% change vs YTD 2019
Total England	£5,122	15%	£6,591	12%	£8,235	7%	£19,948	10%
London	£3,356	7%	£4,264	15%	£4,688	5%	£12,308	9%
Rest Of England	£1,766	32%	£2,328	6%	£3,547	10%	£7,640	13%
North East	£71**	82%	£74	-10%	£134	21%	£278	20%
North West	£368	32%	£529	17%	£651	41%	£1,548	29%
Yorkshire	£131	75%	£155	52%	£245	-13%	£531	16%
West Midlands	£190	11%	£270	39%	£375	-14%	£835	4%
East Midlands	£133	80%	£124	4%	£220	43%	£477	37%
East Of England	£254	77%	£245	-8%	£379	4%	£877	13%
South West	£204	16%	£381	12%	£567	7%	£1,152	10%
South East	£410	7%	£545	-14%	£972	10%	£1,927	2%
Scotland	£359	71%	£1,087	53%	£1,497	43%	£2,943	50%
Wales	£67	23%	£121	-8%	£201	0%	£390	1%
Total UK	£5,625	17%	£7,898	15%	£10,077	10%	£23,600	13%

- Inbound spend in **London** accounted for 47% of the total UK inbound spend, reaching £4.7bn in Q3 2023 (up 7% vs 2019). Those visiting the **Rest of England** accounted for 35% of the total spend, totalling at a record £3.5bn (up 10% vs 2019). Overall, inbound visitors spend £8.2bn in **England** during Q3 2023, up 7% vs Q3 2019.
- Of the England regions (outside London), the **South East** (£972m; a new record), **North West** (£651m) and **South West** (£567m) received the highest amount of spend.
- In **Scotland**, spend reached a record £1.5bn (up 43% vs Q3 2019).
- **Wales** received a record £201m spend from inbound visitors, just above 2019.
- Year-to-date spend to each nation and region surpassed pre-pandemic levels in nominal terms.
- New records were set for Rest of England, South East, East Midlands, Scotland and Wales. *Please note these figures do not account for inflation.*

International Passenger Survey by the ONS 2019, 2022 & 2023. See notes on 2022 data on slide 10. See sample on slide 11. All values and percentage changes in spend are in nominal terms unless otherwise specified. **Caution, low base sizes.

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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 **24th January 2024.** The report covers quarter 3 (July to September) of 2023. Comparisons have been made to 2019 to show the rate of recovery.

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.

- **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 IPS annual 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	Q2 2023	Q3 2023
Total England	6,703	7,461	7,719
London	3,882	4,615	4,692
Rest Of England	3,137	3,394	3,638
North East	68	105	148
North West	814	823	699
Yorkshire	218	276	300
West Midlands	527	444	475
East Midlands	241	235	262
East Of England	358	444	465
South West	407	525	670
South East	720	953	1,168
Scotland	605	998	1,076
Wales	253	230	340
Total UK	6,167	11,670	10,864

- ***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 2023. TOTAL UK figures do not the sum of each region as visitors may visit more than one nation/region.

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