# Total UK: Quarterly Inbound Update

Provisional Q3 2023 (July to September)

International Passenger Survey by the ONS

(Published 24th January 2024)

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# 1. Summary

Provisional Q3 2023

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# Summary – visits, nights, spend

- **Recovery of visits plateaued and remained below pre-pandemic levels in Q3 2023:**
  - → During Jul-Sep 2023, the UK welcomed 10.9m inbound **visits**, down 8% vs Q3 2019 but up 9% vs Q3 2022.
  - → Year-to-date figures showed visits just behind 2019 at -7% but above 2022 by 31%

- **Spend was up in nominal terms but tracked down in real terms vs Q3 2019:**
  - → Visitors **spent** £10.1bn in Q3 2023, 10% higher vs Q3 2019 and 11% higher than Q3 2022 (in nominal terms). This was the second highest Q3 on record, just behind inbound spend in Q3 2017. In real terms, visitor spend in Q3 2023 was down 10% vs Q3 2019 and down 7% year to date.
  - → The **average spend per visit** was £927 from July to September 2023, up 20% vs Q3 2019 and up 2% vs Q3 2022 (in nominal terms). In real terms, spend per visit was down 1% vs Q3 2019.

- **Nights spent in the UK were just behind pre-pandemic levels:**
  - → In total, 99.5 **nights** were spent in the UK by inbound visitors in Q3 2023, just 3% behind pre-pandemic levels (and up 9% vs Q3 2022).
  - → **Average length of stay** in Q3 2023 was 9.2 nights, slightly longer than in Q3 2019 (8.7 nights) but the same as Q3 2022.
  - → **Average spend per night** was £101; higher in nominal terms than in 2019 and 2022 but in real terms, down 7% vs Q3 2019.

International Passenger Survey by the ONS 2019, 2022 & 2023P. All values and percentage changes in spend are in nominal terms unless otherwise specified. See notes on 2022 data on slide 31. Image: London ©VisitBritain/Sarah Smith

# Summary – journey purpose and inbound markets

- **VFR visits remained above 2019 whilst holiday visits were just behind and business visits were lagging further behind:**
  - → From July to September 2023 there were 5.0m **holiday** visits to the UK, down 8% vs Q3 2019 and up 15% vs Q3 2022. These visitors spent a record £5.4bn during Q3.
  - → Inbound **visits to friends and relatives (VFR)** totalled at 3.6m visits across the 3 months, surpassing both 2019 and 2022 levels. Spend from those visiting friends and relatives totalled at £2.5bn.
  - → **Business** visits were down -27% in the third quarter vs Q3 2019, at 1.6m visits. Spend recovered to £1.4bn, down 6% vs Q3 2019, and on par with Q3 2022.
- **North American visits continued to surpass 2019 visits whilst Europe was just below 2019 and Rest of World tracked further behind:**
  - → There were 6.6m visits from **Europe** from July to September 2023, down 8% vs Q3 2019 (and up 8% vs Q3 2022). Inbound spend from Europe reached a record £4.1bn in Q3 2023.
  - → Visits from **North America** reached 1.9m, up 11% vs Q3 2019 but down 11% vs Q3 2022. Spend surpassed pre-pandemic levels by around half (49%) totalling at £2.4bn spend.
  - → The **Rest of World** contributed 2.4m visits in Q3 2023 with the slowest recovery out of the regions above (down 19% vs 2019). **The Rest of World** contributed £3.6bn in Q3 2023, down 6% vs Q3 2019 but up by one third vs Q3 2022.

International Passenger Survey by the ONS 2019, 2022 & 2023P. All values and percentage changes in spend are in nominal terms unless otherwise specified. See notes on 2022 data on slide 31. Image: ©VisitBritain/Ben Selway

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# 2. Latest inbound UK and market statistics

Provisional Q3 2023

# Q3 2023 Headlines

| Total | Q1 2023 | % change vs Q1 2019 | % change vs Q1 2022 | Q2 2023 | % change vs Q2 2019 | % change vs Q2 2022 | Q3 2023 | % change vs Q3 2019 | % change vs Q3 2022 | YTD 2023 | % change vs YTD 2019 | % change vs YTD 2022 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Visits (000) | 7,692 | -8% | 105% | 9,882 | -5% | 24% | 10,869 | -8% | 9% | 28,443 | -7% | 31% |
| Spend (£m) | £ 5,625 | 17% | 97% | £ 7,898 | 15% | 15% | £ 10,077 | 10% | 11% | £ 23,600 | 13% | 26% |
| Nights (000) | 55,219 | 9% | 51% | 72,805 | 5% | 15% | 99,493 | -3% | 9% | 227,517 | 2% | 19% |

- During Jul-Sep 2023, the UK welcomed 10.9m inbound **visits**, down 8% vs Q3 2019 but up 9% vs Q3 2022.
- Visitors **spent** £10.1bn in Q3 2023, 10% higher vs Q3 2019 and 11% higher than Q3 2022 (in nominal terms). This was the second highest Q3 on record, just behind inbound spend in Q3 2017. In real terms, visitor spend in Q3 2023 was down 10% vs Q3 2019.
- In total, 99.5 **nights** were spent in the UK by inbound visitors in Q3 2023, just 3% behind pre-pandemic levels (and up 9% vs Q3 2022).
- Year-to-date figures show visits behind 2019 (but around one third above 2022); spend and nights have surpassed both 2019 and 2022 levels, although spend is 7% below 2019 in real terms.
- VisitBritain's **forecast** for 2023 predicts 37.8m inbound visits, 92% of 2019 levels (or -8%). Inbound visitors are forecast to spend £31.7bn, 112% of 2019 levels in nominal terms or 92% in real terms. For more information, see the forecast page.

International Passenger Survey by the ONS 2019, 2022 & 2023P (P indicates provisional data). All values and percentage changes in spend are in nominal terms unless otherwise specified. See notes on 2022 data on slide 31.

# Q3 2023 averages

| Averages | Q3 2019 | Q3 2022 | Q3 2023P | % change vs Q3 2019 | % change vs Q3 2022 |
|---|---|---|---|---|---|
| Average spend per visit (£) | £775 | £912 | £927 | 20% | 2% |
| Average length of stay | 8.7 | 9.2 | 9.2 | 6% | 0% |
| Average spend per night (£) | £89 | £99 | £101 | 13% | 2% |

- The **average spend per visit** was £927 from July to September 2023, up 20% vs Q3 2019 and up 2% vs Q3 2022 (in nominal terms). In real terms, spend per visit was down 1% vs Q3 2019.
- The **average length of stay** in Q3 2023 was 9.2 nights which was slightly longer than in Q3 2019 (8.7 nights) but the same as Q3 2022.
- The **average spend per night** was £101 higher than in 2019 and 2022 (in nominal terms). In real terms, spend per night was down 7% vs Q3 2019.

International Passenger Survey by the ONS 2019, 2022 & 2023P. All values and percentage changes in spend are in nominal terms unless otherwise specified. See notes on 2022 data on slide 31.

# Q3 2023 Journey Purpose – Visits (000)

| Visits (000) | Q1 2023 | % change vs Q1 2019 | % change vs Q1 2022 | Q2 2023 | % change vs Q2 2019 | % change vs Q2 2022 | Q3 2023 | % change vs Q3 2019 | % change vs Q3 2022 | YTD 2023 | % change vs YTD 2019 | % change vs YTD 2022 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Holiday | 2,772 | -7% | 194% | 4,387 | -3% | 33% | 4,946 | -8% | 15% | 12,104 | -6% | 42% |
| VFR | 2,856 | 7% | 64% | 3,110 | 4% | 9% | 3,581 | 4% | 3% | 9,547 | 5% | 18% |
| Business | 1,417 | -33% | 77% | 1,693 | -23% | 31% | 1,566 | -27% | 8% | 4,676 | -28% | 32% |
| Study | 74 | -7% | 78% | 89 | -42% | 4% | 151 | -33% | 21% | 314 | -32% | 25% |
| Misc. | 574 | 16% | 164% | 604 | 16% | 40% | 626 | -9% | 4% | 1,803 | 6% | 44% |

- From July to September 2023, there were 5.0m **holiday** visits to the UK (46% of all inbound visits) down 8% vs Q3 2019 and up 15% vs Q3 2022.
- Inbound **visits to friends and relatives (VFR)** made up 33% of all visits in Q3 2023 with 3.6m visits across the 3 months, surpassing both 2019 and 2022 levels. This was the second highest Q3 on record, just behind VFR visits in Q3 2017.
- **Study** visits recovered to 151,000, down 33% vs Q3 2019 but up 21% vs Q3 2022.
- **Business** visits totalled at 1.6m visits in Q3 2023, down 27% vs Q3 2019 and up 8% vs Q3 2022.
- All other visits under '**miscellaneous'** contributed 626,000 visits in Q3 2023, down 9% on Q3 2019 and up 4% vs Q3 2022.
- Year-to-date figures show VFR and Miscellaneous visits were above pre-pandemic levels, Holiday visits were slightly behind (-6%) and Business and Study visits were lagging further behind at -28% and -32% respectively.

International Passenger Survey by the ONS 2019, 2022 & 2023P. See notes on 2022 data on slide 31.

# Q3 2023 Journey Purpose – Spend (£m)

| Spend (£m) | Q1 2023 | % change vs Q1 2019 | % change vs Q1 2022 | Q2 2023 | % change vs Q2 2019 | % change vs Q2 2022 | Q3 2023 | % change vs Q3 2019 | % change vs Q3 2022 | YTD 2023 | % change vs YTD 2019 | % change vs YTD 2022 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Holiday | £ 2,116 | 2% | 145% | £ 4,110 | 26% | 31% | £ 5,354 | 13% | 21% | £ 11,579 | 15% | 37% |
| VFR | £ 1,672 | 44% | 54% | £ 1,908 | 22% | 9% | £ 2,461 | 21% | -3% | £ 6,041 | 27% | 12% |
| Business | £ 1,124 | -6% | 96% | £ 1,260 | -15% | -6% | £ 1,426 | -6% | 0% | £ 3,810 | -9% | 14% |
| Study | £ 282 | 144% | 68% | £ 226 | -18% | -21% | £ 417 | -21% | 52% | £ 925 | 1% | 27% |
| Misc. | £ 417 | 68% | 168% | £ 378 | 33% | 22% | £ 394 | 0% | 5% | £ 1,189 | 28% | 41% |

- **Holiday** spend accounted for over half of inbound spend in Q3 2023 (53%) with these visitors spending a record £5.4bn, up 13% vs Q3 2019 (and up 21% vs Q3 2022).
- Spend from those **visiting friends and relatives** totalled at £2.5bn, up 21% vs Q3 2019 (but down 3% vs the record held in Q3 2022). VFR spend made up 24% of the total spend.
- **Business** visit spend recovered to £1.4bn, nearing closer to pre-pandemic levels at -6% vs Q3 2019 (and on par with Q3 2022).
- Spend from **study** visitors reached £417m in Q3 2023, down 21% vs Q3 2019.
- All other spend under **'miscellaneous'** contributed £394m in the third quarter, on par with pre-pandemic levels and above Q3 2022.
- Year-to-date figures show all journey purpose spend surpassed 2019 levels, apart from Business spend which is 9% behind.

International Passenger Survey by the ONS 2019, 2022 & 2023P. All values and percentage changes in spend are in nominal terms unless otherwise specified. See notes on 2022 data on slide 31.

# Q3 2023 Global Regions – Visits (000)

| Visits (000) | Q1 2023 | % change vs Q1 2019 | % change vs Q1 2022 | Q2 2023 | % change vs Q2 2019 | % change vs Q2 2022 | Q3 2023 | % change vs Q3 2019 | % change vs Q3 2022 | YTD 2023 | % change vs YTD 2019 | % change vs YTD 2022 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Europe | 5,468 | -10% | 94% | 6,237 | -9% | 20% | 6,548 | -8% | 8% | 18,253 | -9% | 30% |
| EU Total | 4,968 | -10% | 93% | 5,653 | -10% | 20% | 5,954 | -9% | 9% | 16,576 | -10% | 30% |
| EU 15 | 3,957 | -11% | 92% | 4,679 | -10% | 18% | 4,950 | -8% | 9% | 13,586 | -10% | 29% |
| Other EU | 1,011 | -7% | 100% | 974 | -10% | 31% | 1,004 | -11% | 8% | 2,989 | -9% | 37% |
| Rest of Europe | 499 | 0% | 99% | 584 | -4% | 19% | 594 | -8% | -3% | 1,677 | -4% | 24% |
| North America | 997 | 11% | 140% | 1,952 | 27% | 23% | 1,928 | 11% | -11% | 4,877 | 17% | 17% |
| Rest of World | 1,228 | -12% | 142% | 1,694 | -13% | 43% | 2,393 | -19% | 40% | 5,314 | -16% | 57% |

- There were 6.6m visits from **Europe** from July to September 2023, down 8% vs Q3 2019 (and up 8% vs Q3 2022). During Q3, European visits accounted for 60% of total inbound visits. Visits from **EU15** markets recovered to 5.0m in Q3, down 8% vs Q3 2019 and up 9% vs Q3 2022. Visits across European groupings had recovered at similar rates in Q3.
- Visits from **North America** reached 1.9m, up 11% vs Q3 2019 but down 11% vs Q3 2022. It was the second highest Q3 on record for North America, with Q3 2022 holding the record at 2.2m visits.
- The **Rest of World** contributed 2.4m visits in Q3 2023 with the slowest recovery out of the regions above (down 19% vs 2019). However, there is much variation between markets in this group – please see next slide and explore our market level data on the VisitBritain website.
- Year-to-date visits show North America as the only region to surpass pre-pandemic levels.

International Passenger Survey by the ONS 2019, 2022 & 2023P. See notes on 2022 data on slide 31.

# Q3 2023 Global Regions – Spend (£m)

| Spend (£m) | Q1 2023 | % change vs Q1 2019 | % change vs Q1 2022 | Q2 2023 | % change vs Q2 2019 | % change vs Q2 2022 | Q3 2023 | % change vs Q3 2019 | % change vs Q3 2022 | YTD 2023 | % change vs YTD 2019 | % change vs YTD 2022 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Europe | £ 2,644 | 18% | 87% | £ 3,218 | 9% | 16% | £ 4,069 | 10% | 13% | £ 9,930 | 11% | 27% |
| EU Total | £ 2,237 | 15% | 80% | £ 2,743 | 7% | 17% | £ 3,518 | 11% | 14% | £ 8,499 | 11% | 27% |
| EU 15 | £ 1,934 | 21% | 78% | £ 2,438 | 17% | 19% | £ 3,077 | 17% | 15% | £ 7,448 | 18% | 28% |
| Other EU | £ 304 | -11% | 94% | £ 305 | -36% | 3% | £ 442 | -19% | 9% | £ 1,051 | -23% | 22% |
| Rest of Europe | £ 406 | 40% | 141% | £ 475 | 18% | 13% | £ 550 | 1% | 4% | £ 1,431 | 16% | 28% |
| North America | £ 1,096 | 34% | 145% | £ 2,284 | 56% | 8% | £ 2,374 | 49% | -13% | £ 5,754 | 48% | 9% |
| Rest of World | £ 1,885 | 7% | 90% | £ 2,396 | -3% | 22% | £ 3,635 | -6% | 33% | £ 7,916 | -2% | 39% |

- Inbound spend from **Europe** reached a record £4.1bn in Q3 2023, up 10% vs Q3 2019 and up 13% vs Q3 2022. Within Europe, **EU15** markets spent a record £3.1bn during Q3, up on both Q3 of 2019 and 2022 levels.
- Spend from **North America** surpassed pre-pandemic levels by around half in Q3 2023 (49%) totalling at £2.4bn spend, behind the record Q3 2022 spend of £2.7bn.
- The **Rest of World** contributed £3.6bn in Q3 2023, down 6% vs Q3 2019 but up by one third vs Q3 2022.
- Year-to-date visits show that all regions apart from Other EU and Rest of World have surpassed 2019 levels for spend in 2023 so far (in nominal terms).

International Passenger Survey by the ONS 2019, 2022 & 2023P. All values and percentage changes in spend are in nominal terms unless otherwise specified. See notes on 2022 data on slide 31.

# Q3 2023 Market Highlights – Visits (000)

| Visits (000) | Q3 2023 | % change vs Q3 2019 | % change vs Q3 2022 | Year-to-date 2023 | % change vs YTD 2019 | % change vs YTD 2022 |
|---|---|---|---|---|---|---|
| Australia | 455 | 8% | 41% | 917 | 11% | 69% |
| Austria | 94** | 10% | 9% | 239 | -5% | 25% |
| Belgium | 237 | -23% | 6% | 659 | -22% | 33% |
| Brazil | 86 | -7% | -6% | 260 | 15% | 31% |
| Canada | 352 | 17% | -4% | 785 | 14% | 13% |
| China | 173 | -55% | 882% | 261 | -63% | 717% |
| Denmark | 185 | -1% | 0% | 467 | -5% | 35% |
| France | 829 | -8% | 19% | 2,315 | -12% | 16% |
| Germany | 898 | -5% | 20% | 2,263 | -6% | 45% |
| GCC* | 365* | -18% | 45% | 776 | -15% | 35% |
| Hong Kong | 99** | -30% | 128% | 200 | -37% | 205% |
| India | 184 | -21% | 4% | 460 | -20% | 22% |
| Irish Republic | 762 | 7% | 7% | 2,221 | 6% | 25% |
| Italy | 397 | -37% | 2% | 1,193 | -28% | 42% |
| Japan | 81** | -31% | 69% | 175 | -39% | 144% |
| Netherlands | 579 | -4% | 19% | 1,441 | -1% | 28% |
| New Zealand | 107 | 41% | 106% | 212 | 41% | 137% |
| Norway | 148 | -9% | -25% | 446 | -1% | 25% |
| Poland | 398 | -6% | 5% | 1,250 | 3% | 47% |
| Romania | 195 | -4% | 20% | 577 | -15% | 42% |
| Saudi Arabia | 102** | 29% | 71% | 208 | 24% | 49% |
| South Korea | 64** | -18% | 130% | 147 | -36% | 182% |
| Spain | 599 | 10% | 11% | 1,563 | -8% | 25% |
| Sweden | 140 | -28% | -31% | 497 | -15% | 26% |
| Switzerland | 257 | 25% | 4% | 698 | 8% | 17% |
| United Arab Emirates | 160 | -18% | 31% | 334 | -20% | 28% |
| USA | 1,577 | 9% | -12% | 4,092 | 17% | 18% |

- The top inbound markets for visits in Q3 2023 were the **USA, Germany, France, the Irish Republic, Spain, Netherlands and Australia.**
- Of the markets listed, Australia, New Zealand, Saudi Arabia** and Switzerland saw **record visits** in Q3 2023.
- Australia, Austria**, Canada, Irish Republic, New Zealand, Saudi Arabia**, Spain, Switzerland and the USA saw **visits surpass pre-pandemic levels** in Q3 2023.
- You can explore more market level data on the VisitBritain website.

- **Sample advice**

- **These markets have very low sample and have been shown only to give a sense of the decline
- Please see sample sizes by market and sample advice on slide 32

International Passenger Survey by the ONS 2019, 2022 & 2023P. See notes on 2022 data on slide 31. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE). **Caution, low base sizes

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# Q3 2023 Market Highlights – Spend (£m)

| Spend (£m) | Q3 2023 | % change vs Q3 2019 | % change vs Q3 2022 | Year-to-date 2023 | % change vs YTD 2019 | % change vs YTD 2022 |
|---|---|---|---|---|---|---|
| Australia | £668 | 61% | 43% | £1,267 | 43% | 48% |
| Austria** | £64** | 19% | 17% | £165 | 28% | 42% |
| Belgium | £164 | 37% | 50% | £361 | 43% | 33% |
| Brazil | £125 | 29% | 8% | £326 | 56% | 42% |
| Canada | £366 | 47% | -2% | £779 | 29% | 10% |
| China | £375 | -41% | 410% | £621 | -50% | 392% |
| Denmark | £130 | 61% | 19% | £275 | 21% | 44% |
| France | £469 | 11% | 9% | £1,221 | 25% | 12% |
| Germany | £652 | 26% | 30% | £1,394 | 18% | 40% |
| GCC* | £831 | -6% | 38% | £1,777 | -3% | 22% |
| Hong Kong | £124** | -37% | 20% | £275 | -39% | 96% |
| India | £259 | -14% | -4% | £608 | -4% | 16% |
| Irish Republic | £312 | 50% | 12% | £945 | 49% | 31% |
| Italy | £290 | -27% | 7% | £737 | -14% | 40% |
| Japan | £86** | -40% | 18% | £197 | -29% | 76% |
| Netherlands | £417 | 51% | 45% | £858 | 47% | 40% |
| New Zealand | £154 | 87% | 118% | £289 | 119% | 140% |
| Norway | £99 | -33% | -41% | £317 | 7% | 10% |
| Poland | £134 | -8% | 6% | £321 | -5% | 30% |
| Romania | £88 | -1% | 25% | £213 | -36% | 25% |
| Saudi Arabia | £256** | 39% | 36% | £510 | 11% | 6% |
| South Korea | £80** | 5% | 72% | £190 | -14% | 107% |
| Spain | £325 | 12% | 4% | £736 | 1% | 12% |
| Sweden | £111 | 6% | -19% | £317 | 12% | 23% |
| Switzerland | £237 | 44% | 12% | £568 | 43% | 21% |
| United Arab Emirates | £316 | 14% | 27% | £617 | -5% | 18% |
| USA | £2,008 | 49% | -15% | £4,975 | 52% | 8% |

- The top inbound markets for spend in Q3 2023 were the **USA, Australia, Germany, France, Netherlands, China and Canada.** The GCC would rank 2nd if included as one market.
- Of the markets listed, Australia, Belgium, Brazil, Germany, the Irish Republic, Netherlands and New Zealand saw **record Q3 spend** (in nominal terms).
- Many markets had recovered to or surpassed pre-pandemic levels.
- Whilst many North East Asian markets were still lagging behind in recovery, markets like China and Hong Kong showed continued growth from Q2 with China now the 6th largest inbound market for spend in Q3. Other markets not yet recovered to 2019 levels include GCC, India, Italy, Norway, Poland and Romania.
- You can explore more market level data on the VisitBritain website.

- **Sample advice**
- **These markets have very low sample and have been shown only to give a sense of the decline
- Please see sample sizes by market and sample advice on slide 32

International Passenger Survey by the ONS 2019, 2022 & 2023P. All values and percentage changes in spend are in nominal terms unless otherwise specified. See notes on 2022 data on slide 31. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE). **Caution, low base sizes

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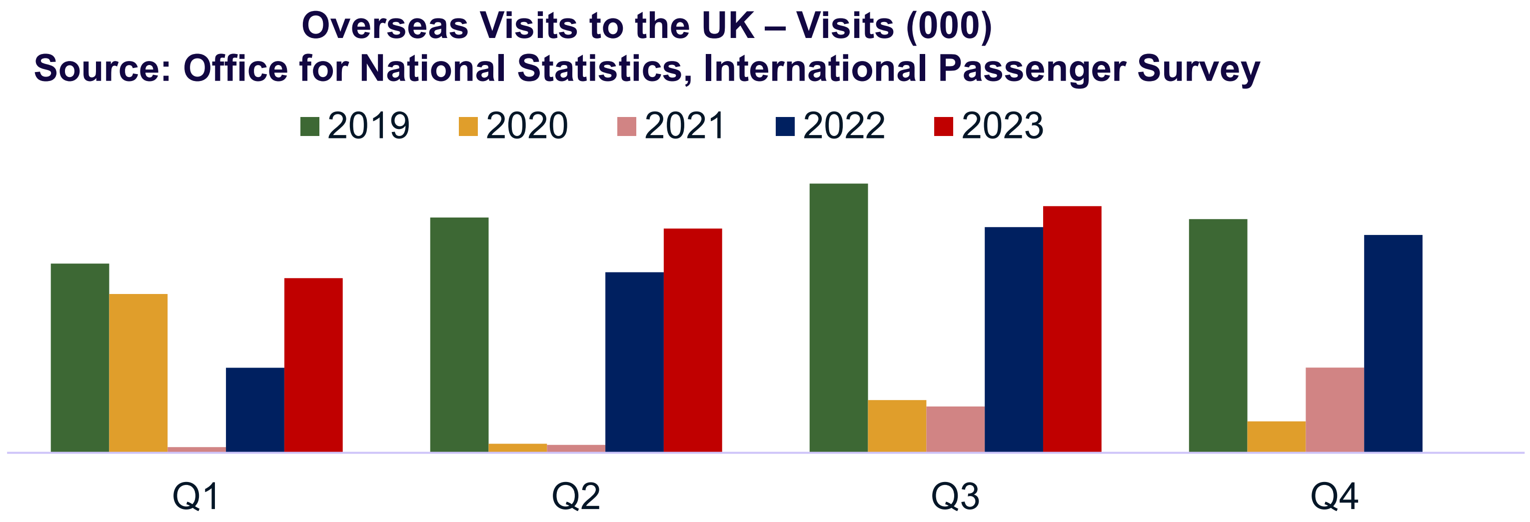
# 3. Detailed quarterly trends

# Detailed quarterly trend – Visits




| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 8,332 | 10,364 | 11,864 | 10,297 |
| 2020 | 6,994 | 398 | 2,322 | 1,386 |
| 2021 | 245 | 346 | 2,040 | 3,753 |
| 2022 | 3,743 | 7,957 | 9,946 | 9,598 |
| 2023P | 7,692 | 9,882 | 10,869 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31.

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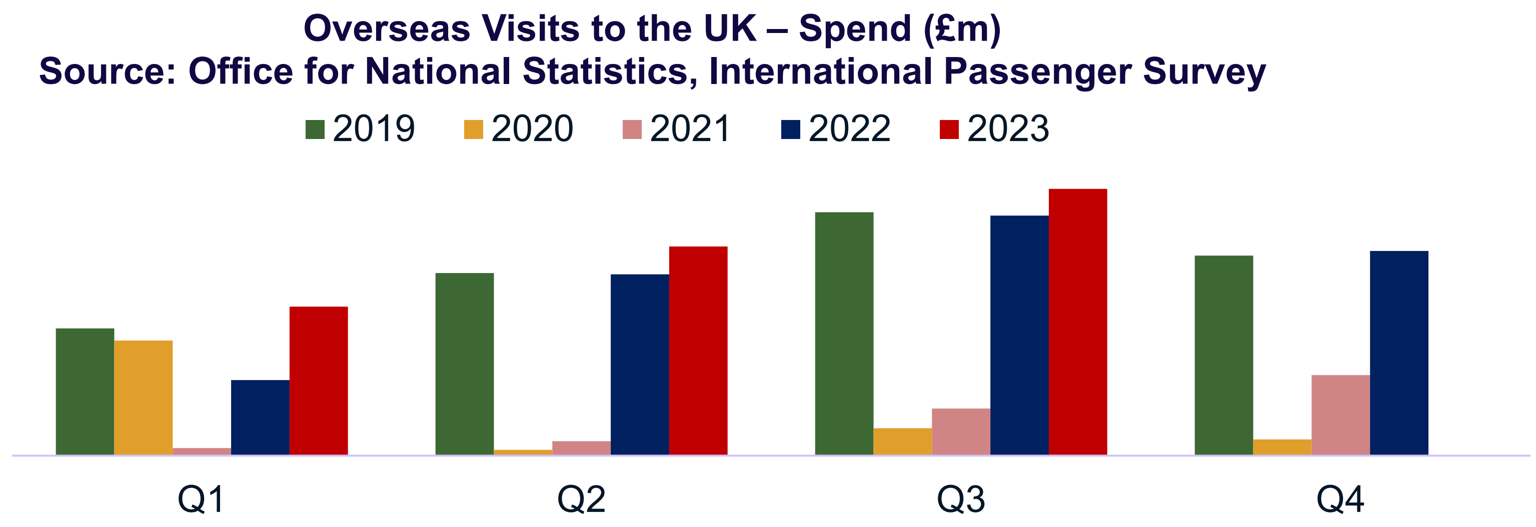
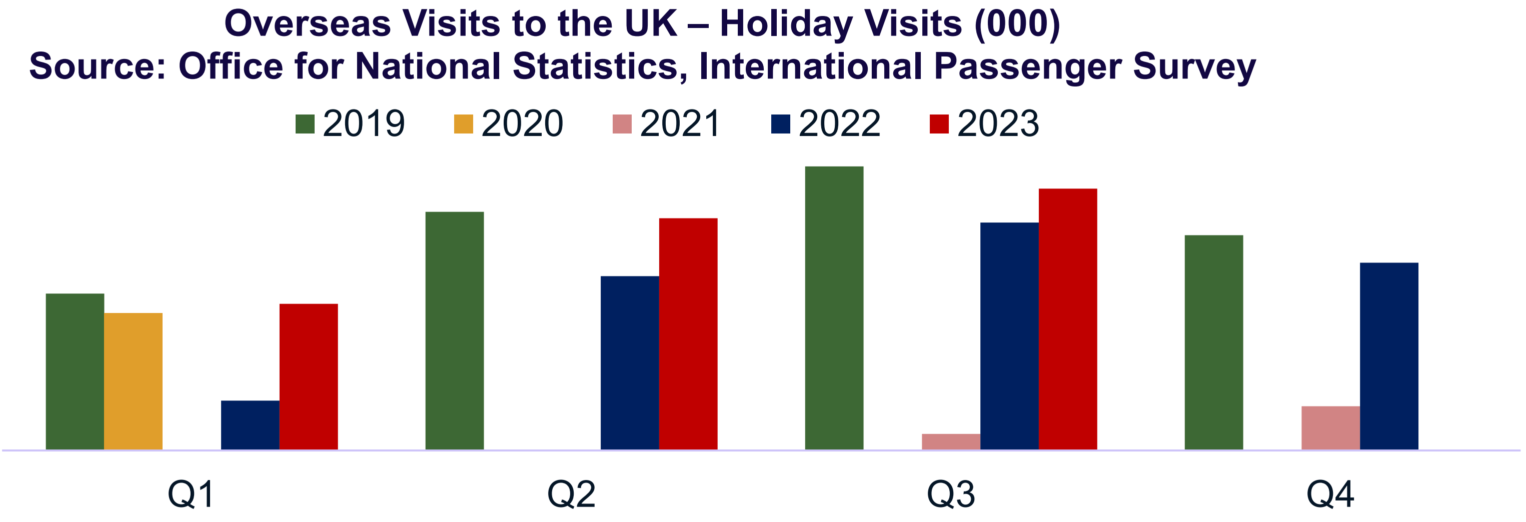
# Detailed quarterly trend – Spend




| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | £4,805 | £6,896 | £9,193 | £7,555 |
| 2020 | £4,344 | £218 | £1,037 | £611 |
| 2021 | £287 | £545 | £1,775 | £3,039 |
| 2022 | £2,852 | £6,847 | £9,066 | £7,732 |
| 2023P | £5,625 | £7,898 | £10,077 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31. All values and percentage changes in spend are in nominal terms unless otherwise specified.

# Detailed quarterly trend by journey purpose - holiday




| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 2,965 | 4,508 | 5,365 | 4,068 |
| 2020 | 2,600 | - | - | - |
| 2021 | 8 | 17 | 313 | 837 |
| 2022 | 944 | 3,295 | 4,306 | 3,547 |
| 2023P | 2,772 | 4,387 | 4,946 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31.

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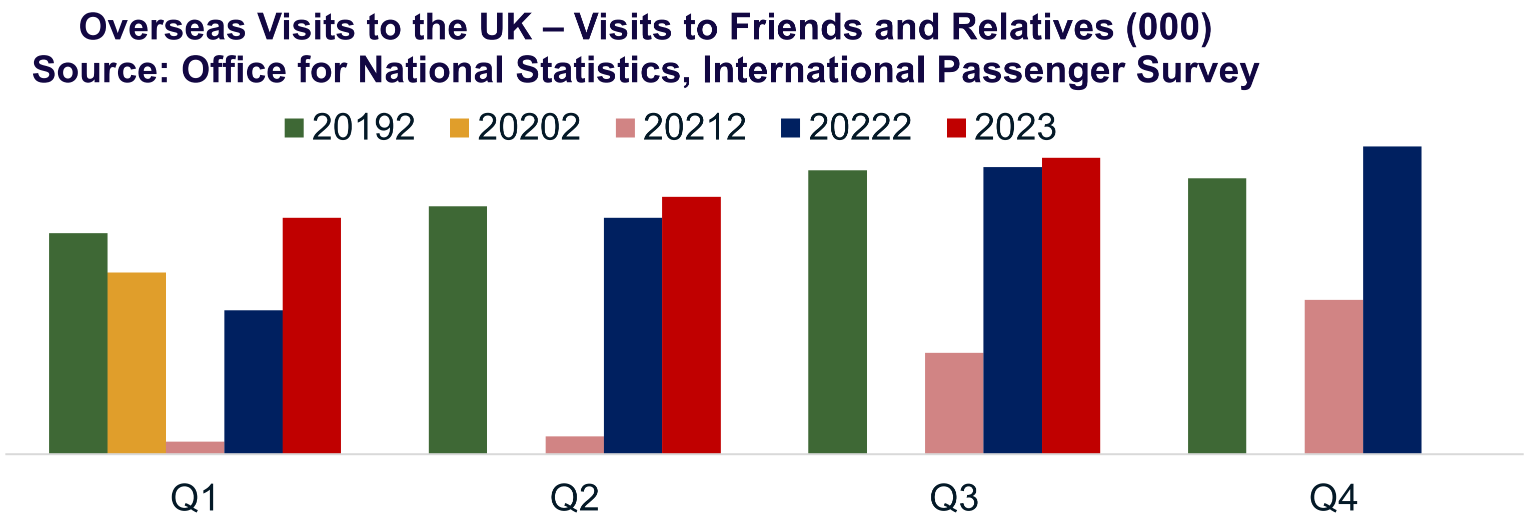
# Detailed quarterly trend by journey purpose - VFR



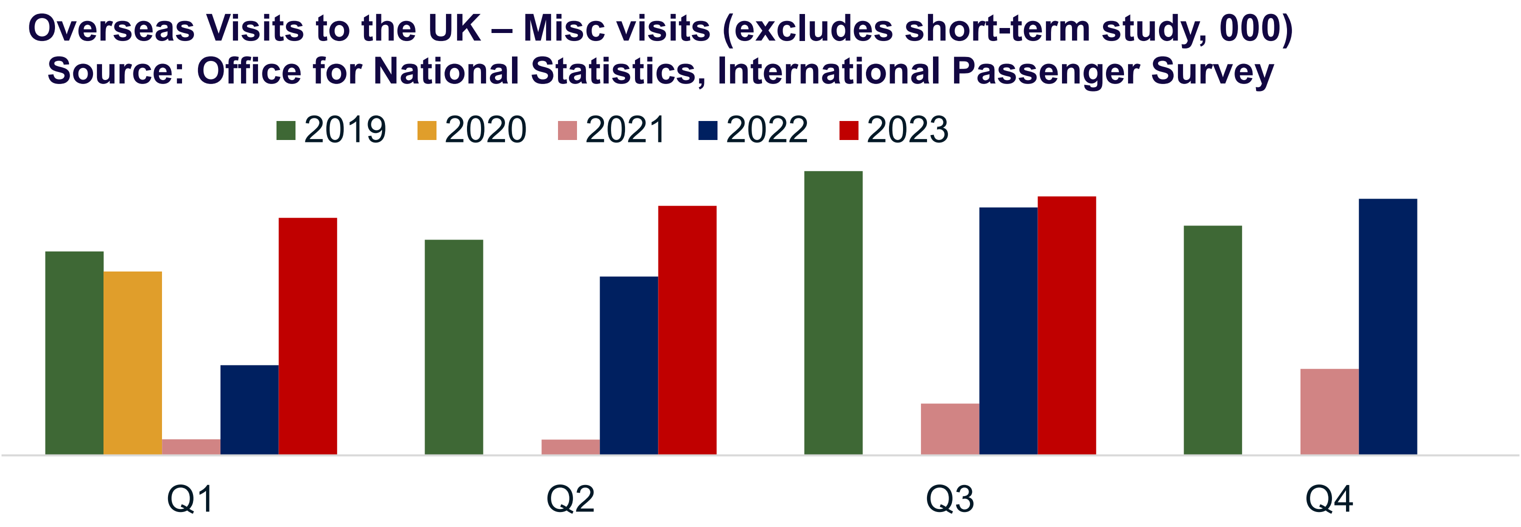

| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 2,670 | 2,995 | 3,430 | 3,333 |
| 2020 | 2,195 | - | - | - |
| 2021 | 151 | 216 | 1,225 | 1,864 |
| 2022 | 1,738 | 2,856 | 3,468 | 3,718 |
| 2023P | 2,856 | 3,110 | 3,581 | |

# Detailed quarterly trend by journey purpose - business


| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 2,124 | 2,189 | 2,157 | 2,200 |
| 2020 | 1,662 | - | - | - |
| 2021 | 34 | 56 | 344 | 788 |
| 2022 | 802 | 1,289 | 1,449 | 1,609 |
| 2023P | 1,417 | 1,693 | 1,566 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31.

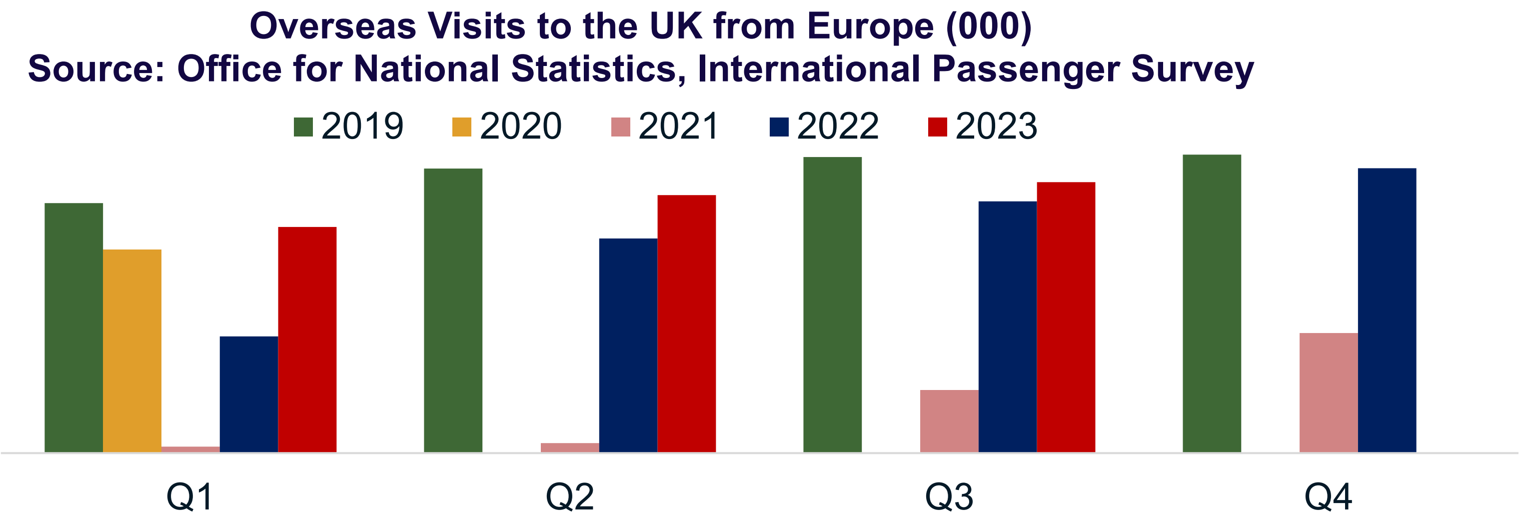
# Detailed quarterly trend by journey purpose - misc




| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 493 | 521 | 687 | 555 |
| 2020 | 444 | - | - | - |
| 2021 | 39 | 38 | 125 | 209 |
| 2022 | 218 | 432 | 599 | 620 |
| 2023P | 574 | 604 | 626 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31.

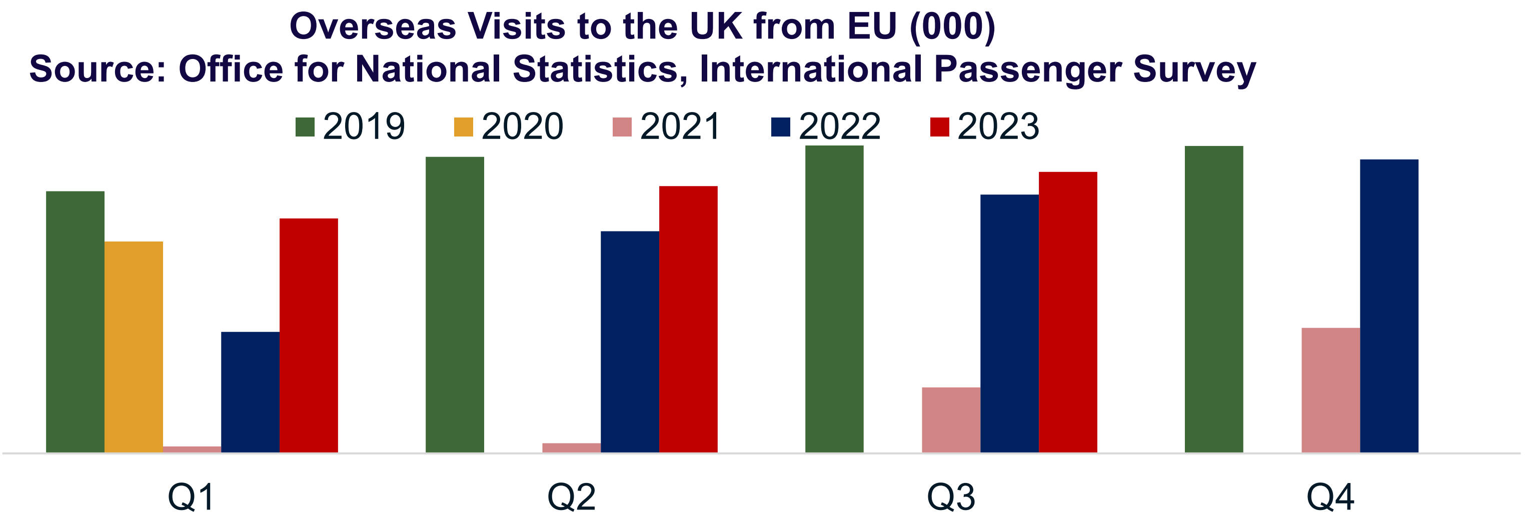
# Detailed quarterly trend by global region - Europe




| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 6,044 | 6,879 | 7,156 | 7,215 |
| 2020 | 4,926 | - | - | - |
| 2021 | 158 | 242 | 1,528 | 2,904 |
| 2022 | 2,821 | 5,189 | 6,085 | 6,886 |
| 2023P | 5,468 | 6,237 | 6,548 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31.

# Detailed quarterly trend by global region - EU




| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 5,543 | 6,272 | 6,512 | 6,502 |
| 2020 | 4,472 | - | - | - |
| 2021 | 147 | 216 | 1,395 | 2,653 |
| 2022 | 2,570 | 4,699 | 5,473 | 6,218 |
| 2023P | 4,968 | 5,653 | 5,954 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31.

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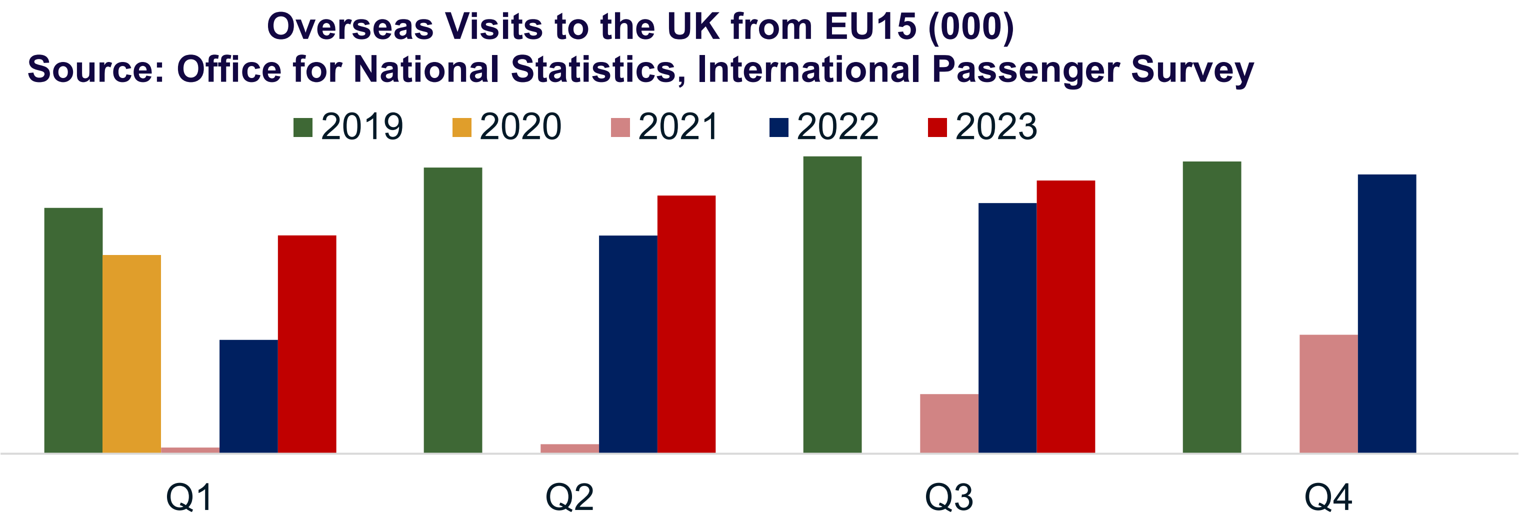
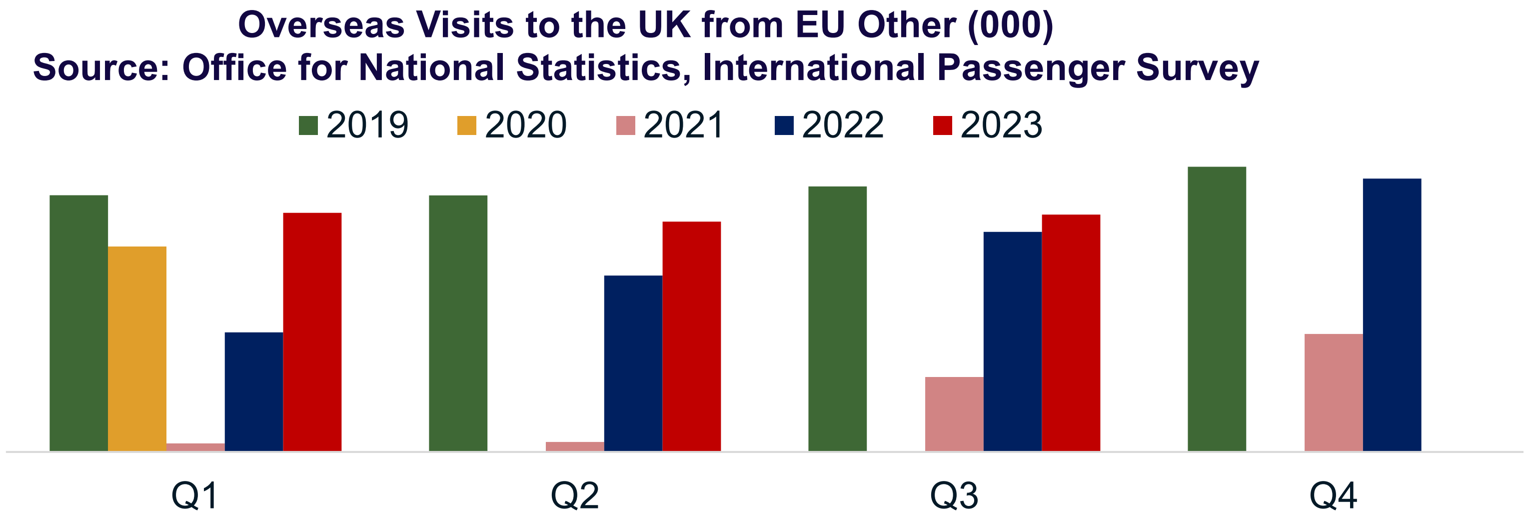
# Detailed quarterly trend by global region - EU15




| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 4,456 | 5,187 | 5,389 | 5,295 |
| 2020 | 3,603 | - | - | - |
| 2021 | 111 | 173 | 1,078 | 2,154 |
| 2022 | 2,063 | 3,954 | 4,542 | 5,062 |
| 2023P | 3,957 | 4,679 | 4,950 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31.

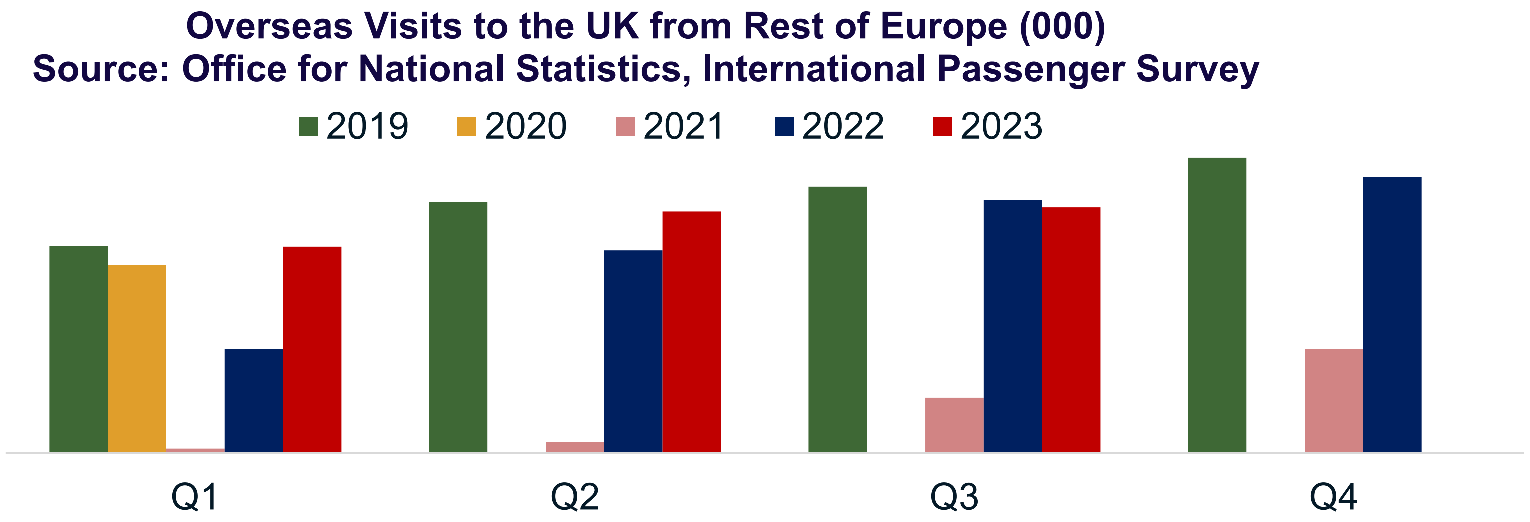
# Detailed quarterly trend by global region - EU Other




| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 1,086 | 1,085 | 1,123 | 1,206 |
| 2020 | 869 | - | - | - |
| 2021 | 36 | 42 | 317 | 499 |
| 2022 | 506 | 746 | 931 | 1,156 |
| 2023P | 1,011 | 974 | 1,004 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31.

# Detailed quarterly trend by global region – Rest of Europe




| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 501 | 607 | 644 | 714 |
| 2020 | 455 | - | - | - |
| 2021 | 11 | 27 | 134 | 252 |
| 2022 | 251 | 490 | 612 | 668 |
| 2023P | 499 | 584 | 594 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31.

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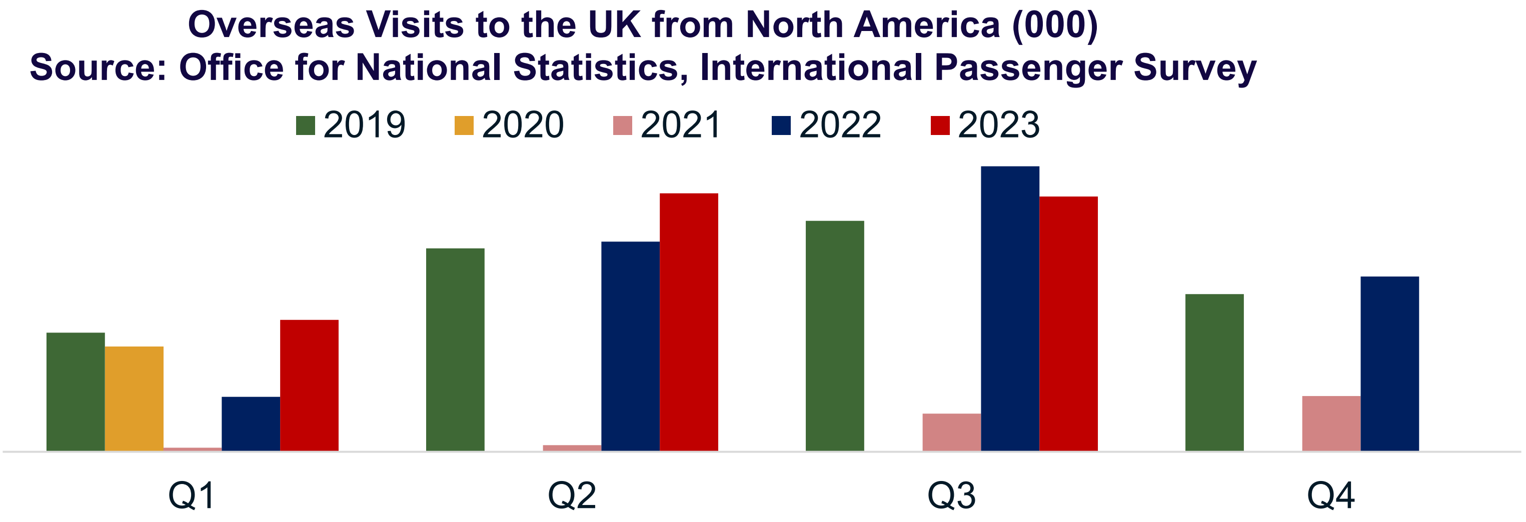
# Detailed quarterly trend by global region - North America

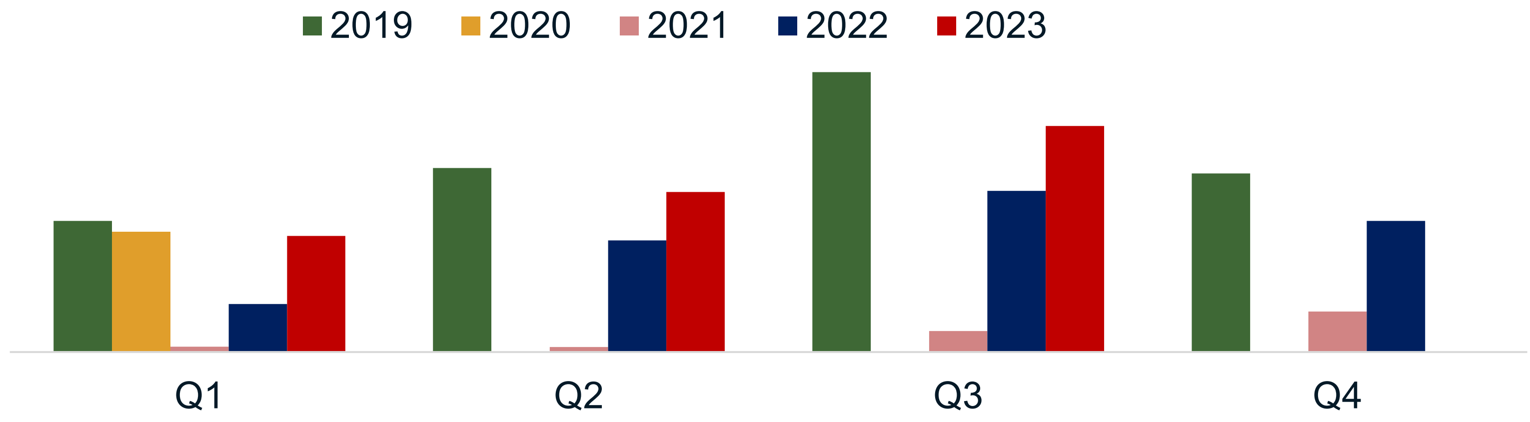



| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 900 | 1,537 | 1,745 | 1,191 |
| 2020 | 794 | - | - | - |
| 2021 | 31 | 51 | 289 | 421 |
| 2022 | 415 | 1,587 | 2,157 | 1,324 |
| 2023P | 997 | 1,952 | 1,928 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31.

# Detailed quarterly trend by global region - Rest of the World

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




| Years | Q1 (Jan-Mar) | Q2 (Apr-Jun) | Q3 (Jul-Sep) | Q4 (Oct-Dec) |
|---|---|---|---|---|
| 2019 | 1,388 | 1,948 | 2,963 | 1,891 |
| 2020 | 1,274 | - | - | - |
| 2021 | 56 | 53 | 222 | 428 |
| 2022 | 508 | 1,181 | 1,705 | 1,388 |
| 2023P | 1,228 | 1,694 | 2,393 | |

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 31.

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# 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 **24th January 2024.** The report covers provisional Q3 2023 data. Comparisons have been made to 2019 to show the rate of recovery, and to 2022 to show growth coming out of the pandemic. 'P' next to 2023 indicates that it is provisional data.

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

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# Sample size

| Sample by country of residence | Q3 2023 |
|---|---|
| Australia | 608 |
| Austria | 91 |
| Belgium | 192 |
| Brazil | 103 |
| Canada | 427 |
| China | 160 |
| Denmark | 157 |
| France | 660 |
| Germany | 786 |
| GCC* | 362 |
| Hong Kong | 92 |
| India | 205 |
| Irish Republic | 835 |
| Italy | 360 |
| Japan | 80 |
| Netherlands | 523 |
| New Zealand | 112 |
| Norway | 158 |
| Poland | 299 |
| Romania | 123 |
| Saudi Arabia | 75 |
| South Korea | 50 |
| Spain | 458 |
| Sweden | 154 |
| Switzerland | 211 |
| United Arab Emirates | 176 |
| USA | 2,103 |

| Time period | Sample |
|---|---|
| Q3 2023 | 10,864 |

| Sample | Q3 2023 |
|---|---|
| Holiday | 4,567 |
| VFR | 3,319 |
| Business | 1,326 |
| Study | 148 |
| Miscellaneous (Excl. study) | 690 |

| Sample | Q3 2023 |
|---|---|
| Total Europe | 5,629 |
| → EU Total | 5,138 |
| → EU 15 | 4,418 |
| → Other EU | 720 |
| → Rest of Europe | 492 |
| North America | 2,530 |
| Rest of World | 2,704 |

- ***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 2023P. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE).

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# 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

# Total UK: Quarterly Inbound Update

Provisional Q3 2023 (July to September)

International Passenger Survey by the ONS

(Published 24th January 2024)

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