

# Total UK: Quarterly Inbound Update

Provisional Q2 2023 (April to June)

International Passenger Survey by the ONS

(Published 19<sup>th</sup> October 2023)



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

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# 1. Summary

Provisional Q2 2023

# Summary – visits, nights, spend

- **Visits:**

- Overall in Q2 2023, the UK welcomed 9.9m inbound **visits**, down 5% vs pre-pandemic levels in Q2 2019 but 24% higher than Q2 2022. There was a month-on-month increase in inbound visits across April, May and June.

- **Spend:**

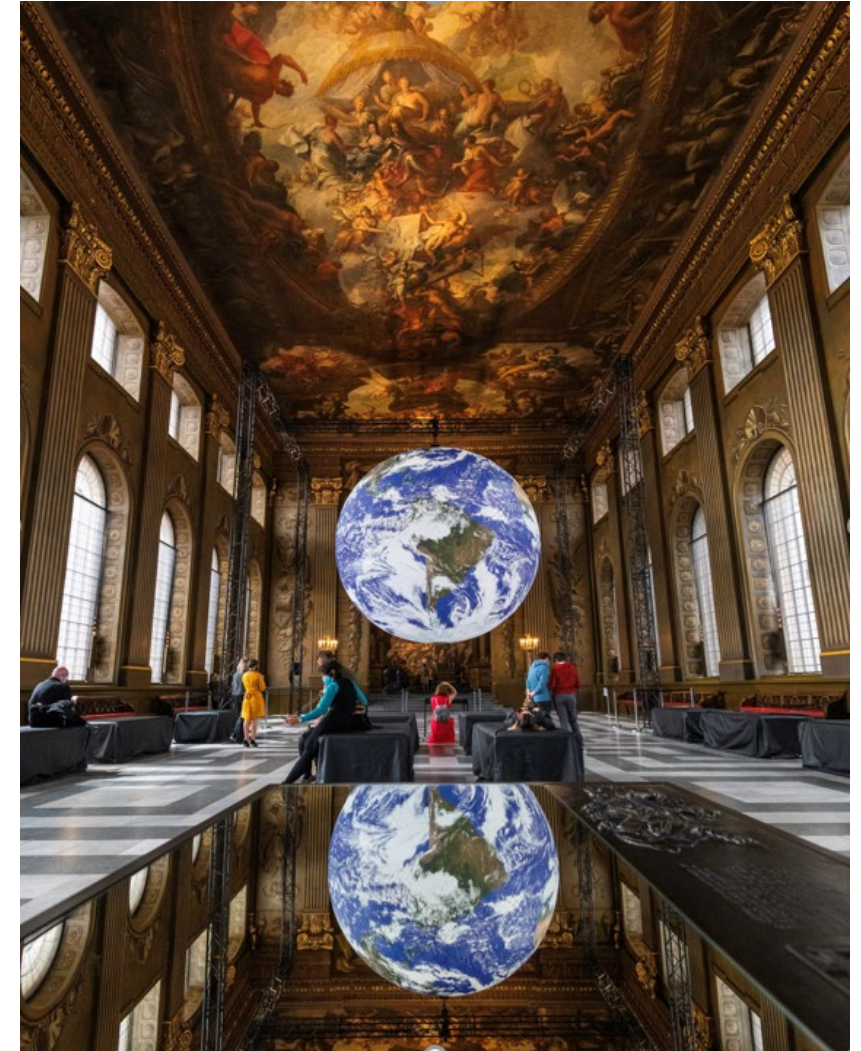
- With record **spend** in April, May and June 2023, visitors spent a record £7.9bn in Q2 2023 (in nominal terms), 15% higher vs Q2 2019 and Q2 2022. In real terms, visitor spend in Q2 2023 was down 6% vs 2019, equivalent to £6.5bn in 2019 prices.

- The **average spend per visit** was £799 from April to June 2023 (in nominal terms), up 20% vs Q2 2019 but down 7% vs Q2 2022. In real terms, spend per visit was £657 in Q2 2023 at Q2 2019 prices, down 1% vs Q2 2019.

- **Nights:**

- In total, 72.8m **nights** were spent in the UK by inbound visitors, up 5% vs Q2 2019 and up 15% vs Q2 2022.

- The **average spend per night** was £108 (in nominal terms); higher than in 2019 and on par with 2022. In real terms, visitors spent £89 in Q2 2019 prices per night on average, down 10% vs Q2 2019.



# Summary – journey purpose and inbound markets

- **Journey Purpose:**

- In Q2 2023, **Holiday** spend accounted for over half of inbound spend in Q2 2023 (52%) with these visitors spending a record £4.1bn, up 26% vs Q2 2019 (and up 31% vs Q2 2022). Holiday visits made up 44% of all visits at 4.4m visits, down 3% vs Q2 2019 (but up 33% vs Q2 2022).
- Inbound **visits to friends and relatives (VFR)** made up 31% of all visits in Q2 2023 with a record 3.1m visits, up 4% vs Q2 2019 (and up 9% vs Q2 2022). Spend also reached a new record of £1.9bn, up 22% vs Q2 2019 (and up 9% vs Q2 2022).
- **Business** visits were down -23% in the second quarter of 2023 vs Q2 2019, at 1.7m visits. Spend recovered to £1.3bn, down 15% vs Q2 2019 (and down 6% vs Q2 2022).
- **Study** visits recovered to 89,000 in Q2 2023, down 42% vs Q2 2019 but up 4% vs Q2 2022. Spend from study visitors can fluctuate quite a lot and reached £226m in Q2 2023, down 18% vs Q2 2019.
- All other visits under '**miscellaneous**' contributed 603,000 visits in Q2 2023, up 16% on Q2 2019. Spend from these visitors contributed a record £378m in the second quarter of 2023, up 33% vs Q2 2019.

- **Regions/Markets:**

- There were 6.2m visits from **Europe** from April to June 2023, down 9% vs Q2 2019, accounting for 63% of total inbound visits. Inbound spend from Europe reached a record £3.2bn in Q2 2023, up 9% vs Q2 2019
- Within Europe, **EU15** markets spent a record £2.4bn in the UK (up 17% vs 2019) with visits recovering to 90% of 2019 levels in Q2 2023.
- In Q2 2023, visits from **North America** continued to break records at 2.0m, up 27% vs Q2 2019. Spend from North America surpassed pre-pandemic levels by more than half (56%) to a record £2.3bn spend.
- The **Rest of World** contributed 1.7m visits in Q2 2023 with the slowest recovery out of the regions above (down 13% vs 2019). Visitors from this region spent £475m (up 18% vs Q2 2019).
- The top inbound markets for visits in Q2 2023 were the **USA, Germany, France, the Irish Republic, Netherlands and Spain.**
- The top inbound markets for spend in Q2 2023 were the **USA, Germany, Australia, France, the Irish Republic and Netherlands.** If including the GCC, it would rank 2<sup>nd</sup>.

## **2. Latest inbound UK and market statistics**

**Provisional Q2 2023**

# Q2 2023 Headlines

Total	Q1 2023P	% change vs Q1 2019	% change vs Q1 2022	Q2 2023P	% change vs Q2 2019	% change vs Q2 2022	Year-to-date 2023P	% change vs YTD 2019	% change vs YTD 2022
Visits (000)	7,692	-8%	105%	9,882	-5%	24%	17,574	-6%	50%
Spend (£m)	£5,625	17%	97%	7,898	15%	15%	13,523	16%	39%
Nights (000)	55,219	9%	51%	72,805	5%	15%	128,024	7%	29%

- From Apr-Jun 2023, the UK welcomed 9.9m inbound **visits**, down 5% vs pre-pandemic levels in Q2 2019 but 24% higher than Q2 2022.
- Visitors **spent** a record £7.9bn in the second quarter of 2023 (in nominal terms), 15% higher vs Q2 2019 and Q2 2023. In real terms, visitor spend in Q2 2023 was down 6% vs 2019, equivalent to £6.5bn in 2019 prices.
- In total, 72.8m **nights** were spent in the UK by inbound visitors, up 5% vs Q2 2019 and up 15% vs Q2 2022.
- Year-to-date figures show visits just behind 2019 whilst spend and nights have surpassed both 2019 and 2022 levels.
- VisitBritain's latest **forecast** for 2023 predicts 37.5m visits, 92% of 2019 levels (or -8%). Inbound visitors are forecast to spend £30.9bn, 109% of 2019 levels in nominal terms or 90% in real terms. For more information, see the [forecast page](#).

# Q2 2023 averages

Averages	Q2 2019	Q2 2022	Q2 2023P	% change vs Q2 2019	% change vs Q2 2022
Average spend per visit (£)	£665	£860	£799	20%	-7%
Average length of stay	6.7	7.9	7.4	10%	-7%
Average spend per night (£)	£100	£109	£108	9%	0%

- The **average spend per visit** was £799 from April to June 2023 (in nominal terms), up 20% vs Q2 2019 but down 7% vs Q2 2022. In real terms, spend per visit was £657 in Q2 2023 at Q2 2019 prices, down 1% vs Q2 2019.
- The **average length of stay** in Q2 2023 was 7.4 nights which was slightly longer than in Q2 2019 (6.7 nights) and slightly shorter than in Q2 2022 (7.9 nights).
- The **average spend per night** was £108 (in nominal terms); higher than in 2019 and on par with 2022. In real terms, visitors spent £89 in Q2 2019 prices per night on average, down 10% vs Q2 2019.

# Q2 2023 Journey Purpose – Visits (000)

Visits (000)	Q1 2023P	% change vs Q1 2019	% change vs Q1 2022	Q2 2023P	% change vs Q2 2019	% change vs Q2 2022	Year-to-date 2023P	% change vs YTD 2019	% change vs YTD 2022
<b>Holiday</b>	2,772	-7%	194%	4,387	-3%	33%	7,158	-4%	69%
<b>VFR</b>	2,856	7%	64%	3,110	4%	9%	5,966	5%	30%
<b>Business</b>	1,417	-33%	77%	1,693	-23%	31%	3,110	-28%	49%
<b>Study</b>	74	-7%	78%	89	-42%	4%	163	-30%	28%
<b>Miscellaneous (Excl. study)</b>	574	16%	164%	603	16%	40%	1,177	16%	81%

- From April to June 2023, those visiting the UK for a **holiday** made up 44% of all visits at 4.4m visits, down 3% vs Q2 2019 (but up 33% vs Q2 2022).
- Inbound **visits to friends and relatives (VFR)** made up 31% of all visits in Q2 2023 with a record 3.1m visits across the 3 months, up 4% vs Q2 2019 (and up 9% vs Q2 2022).
- **Study** visits recovered to 89,000 in Q2 2023, down 42% vs Q2 2019 but up 4% vs Q2 2022.
- **Business** visits were down -23% in the second quarter of 2023 vs Q2 2019, at 1.7m visits.
- All other visits under '**miscellaneous**' contributed 603,000 visits in Q2 2023, up 16% on Q2 2019.
- Year-to-date figures show VFR and Miscellaneous visits were above pre-pandemic levels, Holiday visits were slightly behind (-4%) and Business and Study visits were lagging further behind.

# Q2 2023 Journey Purpose – Spend (£m)

Spend (£m)	Q1 2023P	% change vs Q1 2019	% change vs Q1 2022	Q2 2023P	% change vs Q2 2019	% change vs Q2 2022	Year-to-date 2023P	% change vs YTD 2019	% change vs YTD 2022
<b>Holiday</b>	£2,116	2%	145%	£4,110	26%	31%	£6,226	16%	55%
<b>VFR</b>	£1,672	44%	54%	£1,908	22%	9%	£3,580	31%	26%
<b>Business</b>	£1,124	-6%	96%	£1,260	-15%	-6%	£2,384	-11%	24%
<b>Study</b>	£282	144%	68%	£226	-18%	-21%	£508	30%	12%
<b>Miscellaneous (Excl. study)</b>	£417	68%	168%	£378	33%	22%	£796	49%	71%

- **Holiday** spend accounted for over half of inbound spend in Q2 2023 (52%) with these visitors spending a record £4.1bn, up 26% vs Q2 2019 (and up 31% vs Q2 2022).
- Spend from those **visiting friends and relatives** reached a new record of £1.9bn, up 22% vs Q2 2019 (and up 9% vs Q2 2022). VFR spend made up 24% of the total spend.
- **Business** visit spend recovered to £1.3bn, down 15% vs Q2 2019 (and down 6% vs Q2 2022).
- Spend from **study** visitors can fluctuate quite a lot and reached £226m in Q2 2023, down 18% vs Q2 2019.
- All other spend under '**miscellaneous**' contributed a record £378m in the second quarter of 2023, up 33% vs Q2 2019.
- Year-to-date figures show all journey purpose spend surpassed 2019 levels, apart from Business spend.

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 35.

# Q2 2023 Global Regions – Visits (000)

Visits (000)	Q1 2023P	% change vs Q1 2019	% change vs Q1 2022	Q2 2023P	% change vs Q2 2019	% change vs Q2 2022	Year-to-date 2023P	% change vs YTD 2019	% change vs YTD 2022
<b>Total Europe</b>	5,468	-10%	94%	6,237	-9%	20%	11,705	-9%	46%
→ <b>EU Total</b>	4,968	-10%	93%	5,653	-10%	20%	10,622	-10%	46%
→ <b>EU 15</b>	3,957	-11%	92%	4,679	-10%	18%	8,636	-10%	44%
→ <b>Other EU</b>	1,011	-7%	100%	974	-10%	31%	1,985	-9%	59%
→ <b>Rest of Europe</b>	499	0%	99%	584	-4%	19%	1,083	-2%	46%
<b>North America</b>	997	11%	140%	1,952	27%	23%	2,948	21%	47%
<b>Rest of World</b>	1,228	-12%	142%	1,694	-13%	43%	2,921	-12%	73%

- There were 6.2m visits from **Europe** from April to June 2023, down 9% vs Q2 2019. European visits accounted for 63% of total inbound visits. Visits from **EU15** markets recovered to 90% of 2019 levels in Q2, whilst visits from the **Rest of Europe** recovered to 96% of 2019.
- In Q2 2023, visits from **North America** continued to break records at 2.0m, up 27% vs Q2 2019.
- The **Rest of World** contributed 1.7m visits in Q2 2023 with the slowest recovery out of the regions above (down 13% 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.

# Q2 2023 Global Regions – Spend (£m)

Spend (£m)	Q1 2023P	% change vs Q1 2019	% change vs Q1 2022	Q2 2023P	% change vs Q2 2019	% change vs Q2 2022	Year-to-date 2023P	% change vs YTD 2019	% change vs YTD 2022
<b>Total Europe</b>	£2,644	18%	87%	£3,218	9%	16%	£5,862	13%	40%
→ <b>EU Total</b>	£2,237	15%	80%	£2,743	7%	17%	£4,981	11%	38%
→ <b>EU 15</b>	£1,934	21%	78%	£2,438	17%	19%	£4,372	19%	39%
→ <b>Other EU</b>	£304	-11%	94%	£305	-36%	3%	£609	-26%	34%
→ <b>Rest of Europe</b>	£406	40%	141%	£475	18%	13%	£881	27%	49%
<b>North America</b>	£1,096	34%	145%	£2,284	56%	8%	£3,380	48%	32%
<b>Rest of World</b>	£1,885	7%	90%	£2,396	-3%	22%	£4,281	1%	45%

- Inbound spend from **Europe** reached a record £3.2bn in Q2 2023, up 9% vs Q2 2019. Within Europe, **EU15** markets spent a record £2.4bn in the UK (up 17% vs 2019) whilst visitors from the **Rest of Europe** spent a £475m (up 18% vs Q2 2019).
- Spend from **North America** surpassed pre-pandemic levels by more than half (56%) to a record £2.3bn spend.
- The **Rest of World** contributed £2.4bn spend in Q2 2023, down 3% vs Q2 2019.
- Year-to-date visits show that all regions apart from Other EU have surpassed 2019 levels for spend in 2023 so far (in nominal terms).

# Q2 2023 Market Highlights – Visits (000)

Visits (000)	Q1 2023	% change vs Q1 2019	Q2 2023	% change vs Q2 2019	Year-to-date 2023	% change vs YTD 2019
Australia	154	11%	308	14%	463	13%
Austria**	61	-24%	84	-1%	145	-12%
Belgium	198	-16%	224	-25%	422	-21%
Brazil**	93	26%	82	35%	174	30%
Canada	165	25%	267	6%	433	12%
China**	17	-86%	71	-65%	88	-73%
Denmark	150	27%	133	-28%	283	-7%
France	673	-17%	812	-13%	1,486	-15%
Germany	469	-31%	897	12%	1,365	-7%
GCC*	196	-9%	215	-13%	411	-11%
Hong Kong**	40	-43%	61	-42%	101	-42%
India	90	-24%	186	-17%	276	-19%
Irish Republic	741	14%	719	0%	1459	6%
Italy	419	-13%	376	-32%	796	-23%
Japan**	57	-25%	37	-61%	94	-45%
Netherlands	371	-7%	491	7%	862	1%
New Zealand**	37	71%	68	29%	105	41%
Norway	138	0%	159	7%	298	3%
Poland	432	13%	420	2%	852	7%
Romania	214	-16%	168	-22%	382	-19%
Saudi Arabia**	53	53%	53	-3%	107	19%
South Korea**	34	-48%	49	-42%	83	-45%
Spain	496	-5%	468	-26%	964	-17%
Sweden	153	-23%	204	5%	356	-9%
Switzerland	194	-1%	246	1%	440	0%
United Arab Emirates	80	-13%	95	-27%	175	-21%
USA	831	8%	1,684	31%	2,515	23%

- The top inbound markets for visits in Q2 2023 were the **USA, Germany, France, the Irish Republic, Netherlands and Spain.**
- Of the markets listed, Australia, New Zealand\*\* and the USA saw record visits in Q2 2023.
- Australia, Brazil\*\*, Canada, Germany, the Irish Republic (on par), Netherlands, New Zealand\*\*, Norway, Poland, Sweden, Switzerland and the USA saw visits surpass pre-pandemic levels.
- 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 36

# Q2 2023 Market Highlights – Spend (£m)

Spend (£m)	Q1 2023P	% change vs Q1 2019	Q2 2023P	% change vs Q2 2019	Year-to-date 2023P	% change vs YTD 2019
Australia	£154	11%	£415	24%	£599	26%
Austria**	£61	-24%	£69	74%	£101	35%
Belgium	£198	-16%	£109	49%	£197	48%
Brazil**	£93	26%	£90	90%	£201	80%
Canada	£165	25%	£239	9%	£413	17%
China**	£17	-86%	£171	-56%	£246	-60%
Denmark	£150	27%	£65	-33%	£145	-1%
France	£673	-17%	£392	33%	£752	35%
Germany	£469	-31%	£512	21%	£742	12%
GCC*	£518	5%	£427	-6%	£945	0%
Hong Kong**	£40	-43%	£83	-43%	£151	-40%
India	£90	-24%	£230	0%	£349	4%
Irish Republic	£741	14%	£299	38%	£633	49%
Italy	£419	-13%	£226	0%	£447	-3%
Japan**	£57	-25%	£54	-35%	£112	-17%
Netherlands	£371	-7%	£270	41%	£441	43%
New Zealand**	£37	71%	£93	182%	£135	172%
Norway	£138	0%	£119	58%	£218	46%
Poland	£432	13%	£87	-20%	£187	-2%
Romania	£214	-16%	£55	-59%	£126	-48%
Saudi Arabia**	£53	53%	£95	-25%	£254	-8%
South Korea**	£34	-48%	£88	-3%	£110	-24%
Spain	£496	-5%	£226	-13%	£411	-7%
Sweden	£153	-23%	£131	29%	£206	15%
Switzerland	£194	-1%	£166	33%	£332	42%
United Arab Emirates	£80	-13%	£158	-25%	£301	-18%
USA	£831	8%	£2,044	65%	£2,967	54%

- The top inbound markets for spend in Q2 2023 were the **USA, Germany, Australia, France, the Irish Republic and Netherlands**. If including the GCC, it would rank 2<sup>nd</sup>.
- Of the markets listed, Australia, Austria, Germany, India, the Irish Republic, Netherlands, New Zealand\*\* and the USA saw record spend in Q2 2023 (in nominal terms).

• You can explore more market level data on the [VisitBritain website](#).

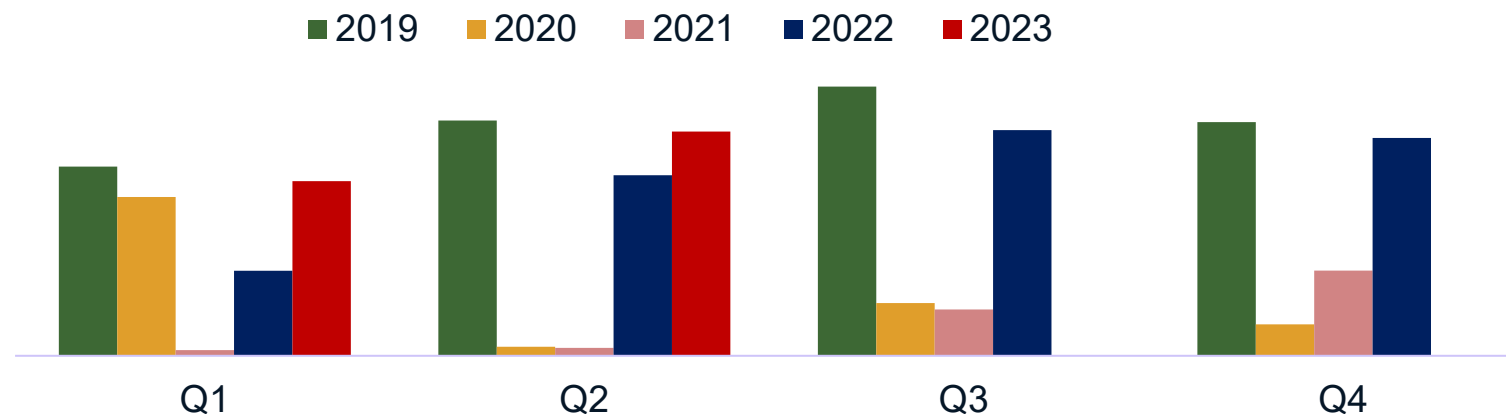
## • Sample advice

- \*\*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 36

### **3. Detailed quarterly trends**

# Detailed quarterly trend – Visits

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

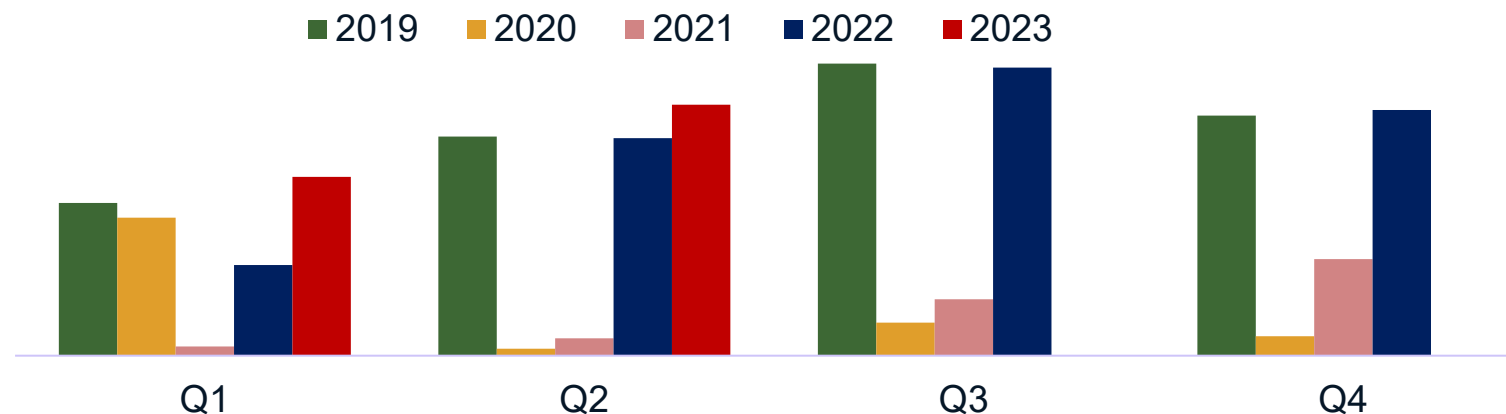


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	8,332	10,364	11,864	10,297
2020	6,994	398	2,322	1,386
2021	245	346	2,040	3,753
2022	3,743	7,957	9,946	9,598
2023P	7,692	9,882		

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trend – Spend

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



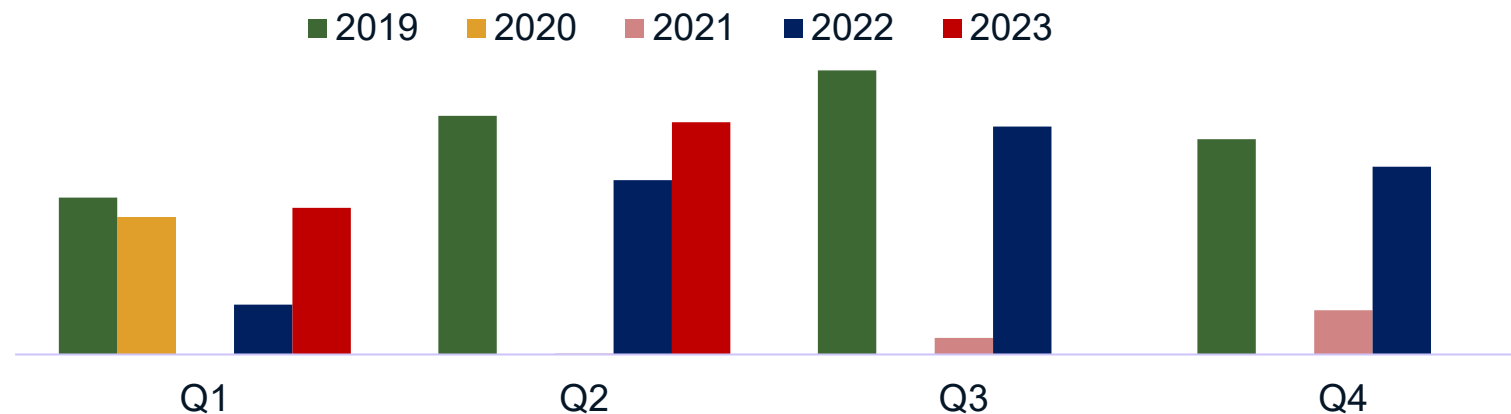
Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	4,805	6,896	9,193	7,555
2020	4,344	218	1,037	611
2021	287	545	1,775	3,039
2022	2,852	6,847	9,066	7,732
2023P	5,625	7,898		

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

International Passenger Survey by the ONS 2018-2023P. Please note impact of Covid-19 on 2020, 2021 and 2022 data on slide 35. All values and percentage changes in spend are in nominal terms unless otherwise specified.

# Detailed quarterly trend by journey purpose - holiday

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

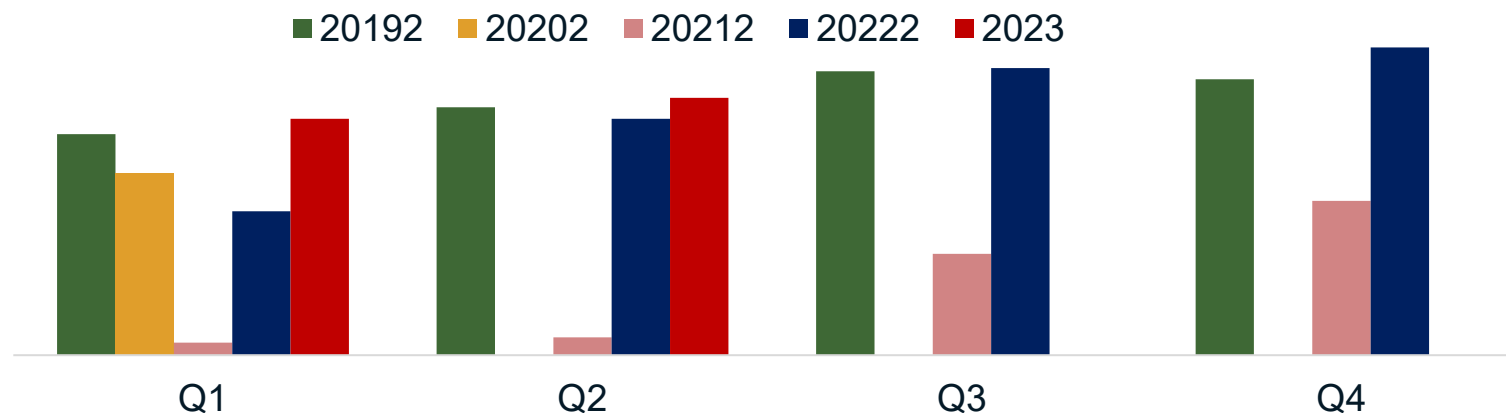


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	2,965	4,508	5,365	4,068
2020	2,600	-	-	-
2021	8	17	313	837
2022	944	3,295	4,306	3,547
2023P	2,772	4,387	-	-

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trend by journey purpose - VFR

Overseas Visits to the UK – Visits to Friends and Relatives (000)  
Source: Office for National Statistics, International Passenger Survey

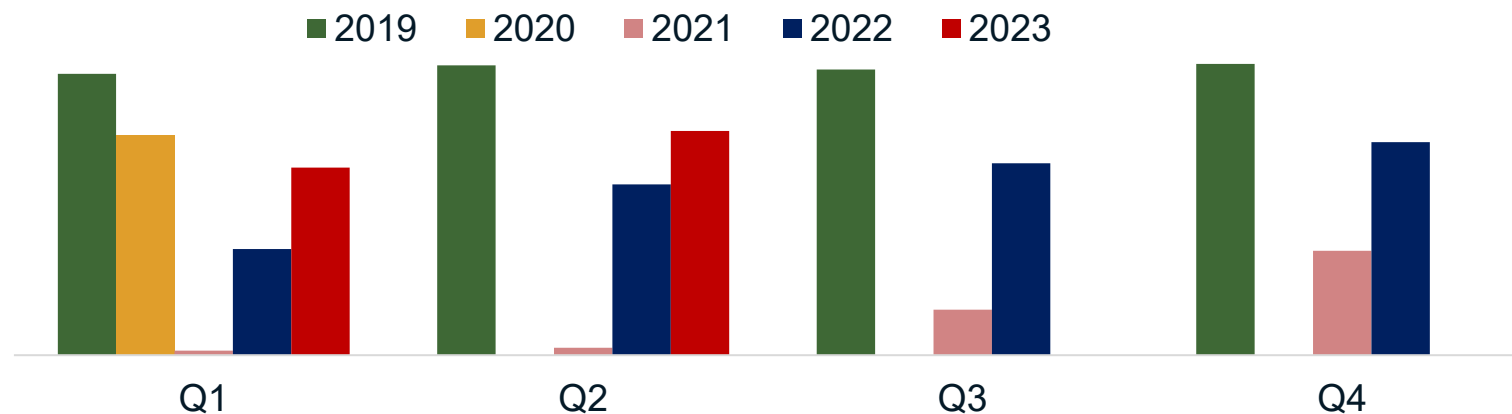


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	2,670	2,995	3,430	3,333
2020	2,195	-	-	-
2021	151	216	1,225	1,864
2022	1,738	2,856	3,468	3,718
2023P	2,856	3,110	-	-

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trend by journey purpose - business

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

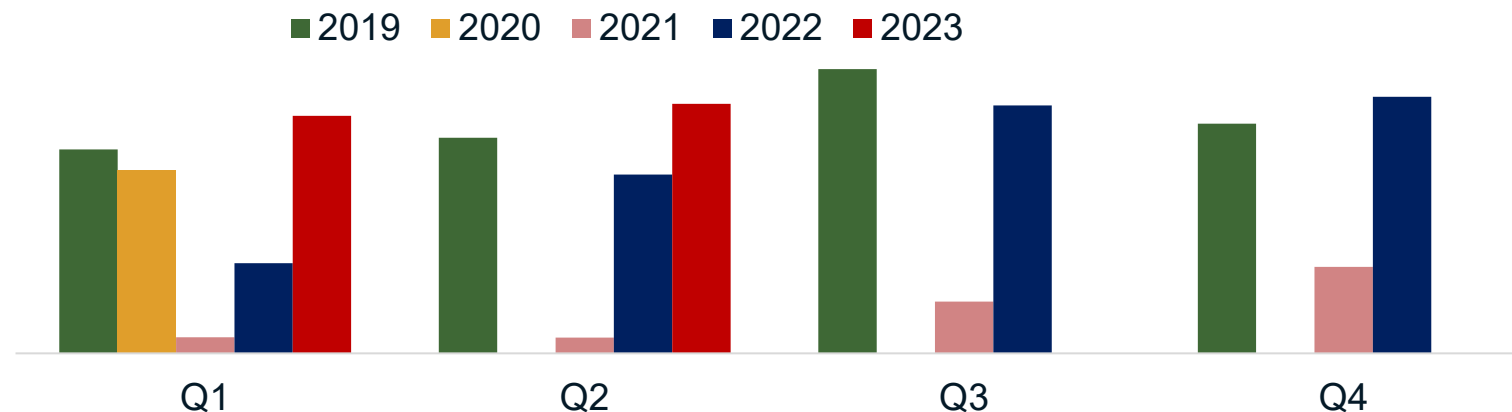


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	2,124	2,189	2,157	2,200
2020	1,662	-	-	-
2021	34	56	344	788
2022	802	1,289	1,449	1,609
2023P	1,417	1,693	-	-

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trend by journey purpose - misc

Overseas Visits to the UK – Misc visits (excludes short-term study, 000)  
Source: Office for National Statistics, International Passenger Survey

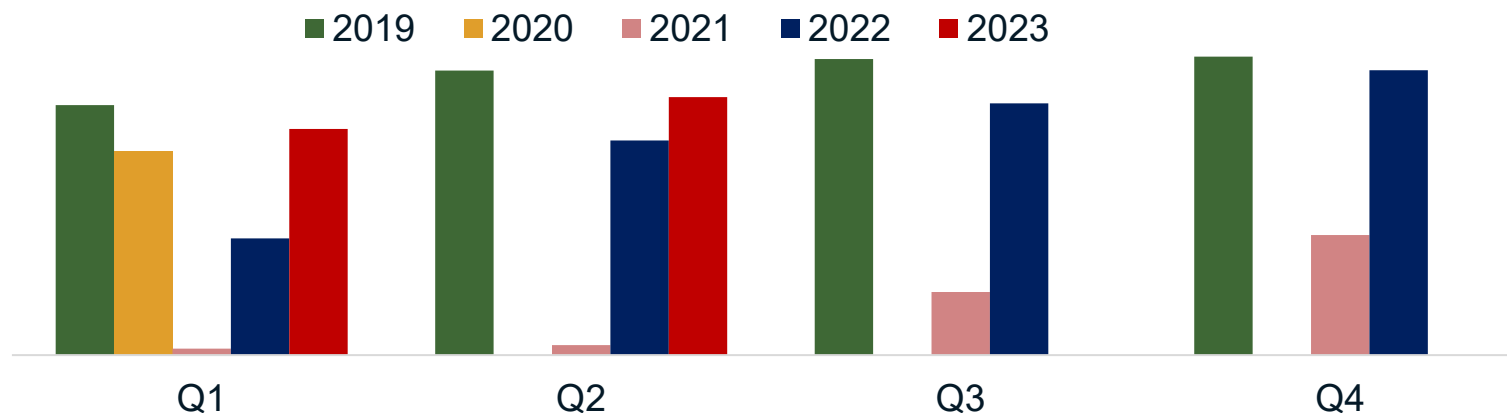


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	493	521	687	555
2020	444	-	-	-
2021	39	38	125	209
2022	218	432	599	620
2023P	574	603		

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trend by global region - Europe

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

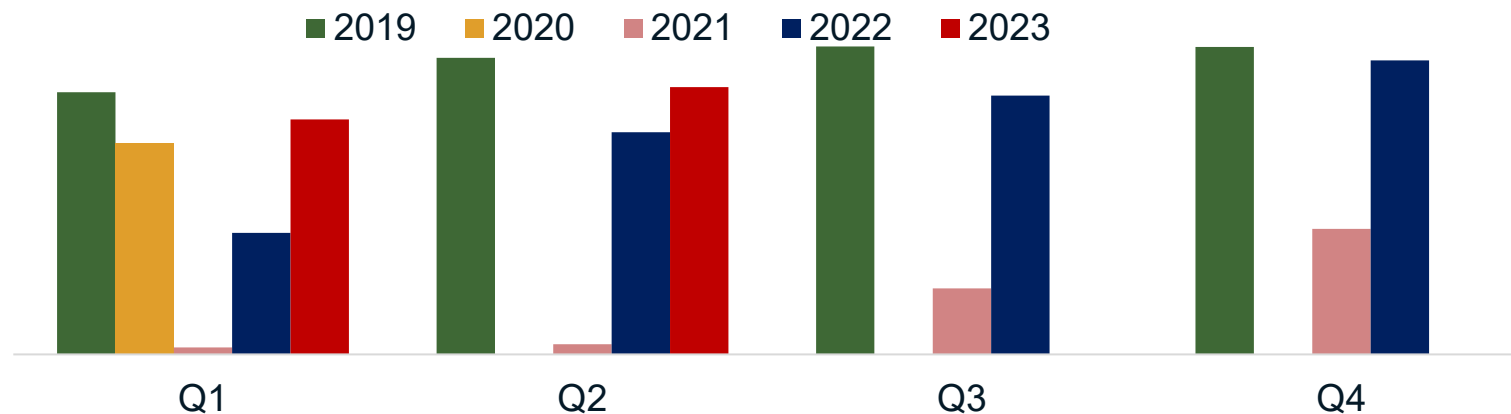


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	6,044	6,879	7,156	7,215
2020	4,926	-	-	-
2021	158	242	1,528	2,904
2022	2,821	5,189	6,085	6,886
2023P	5,468	6,237		

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trend by global region - EU

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

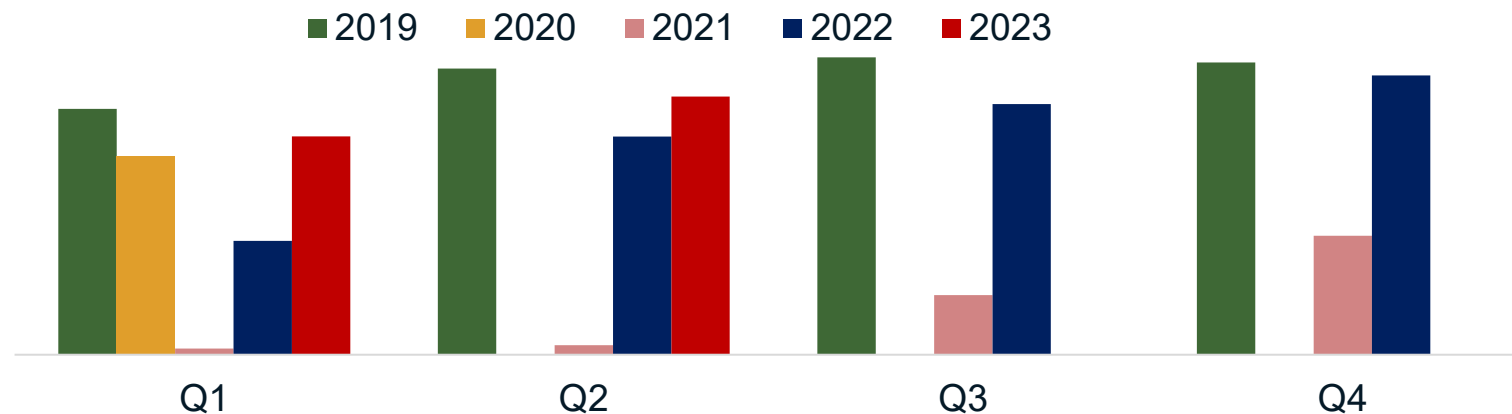


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	5,543	6,272	6,512	6,502
2020	4,472	-	-	-
2021	147	216	1,395	2,653
2022	2,570	4,699	5,473	6,218
2023P	4,968	5,653		

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trend by global region - EU15

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

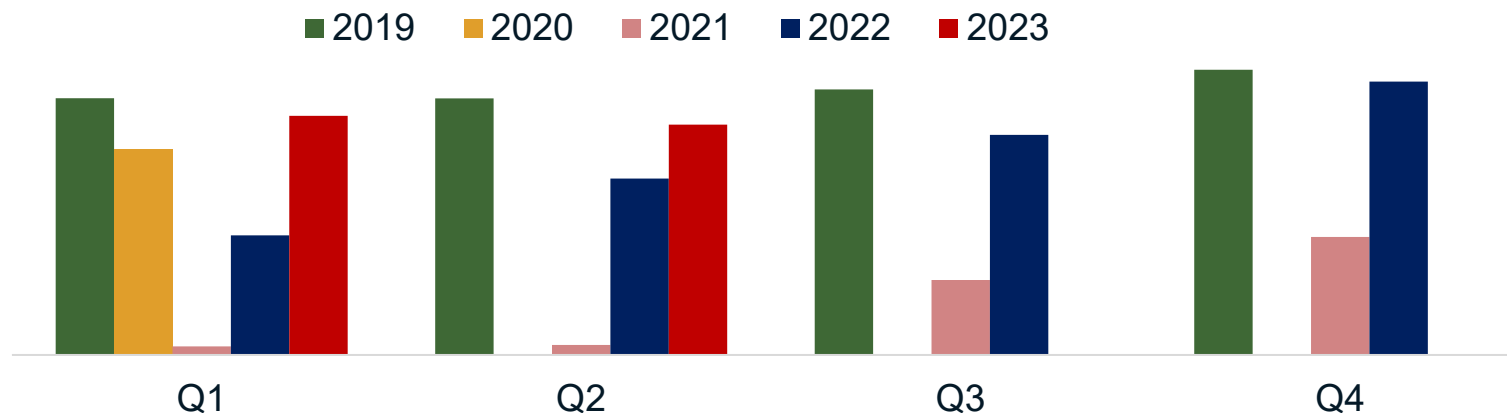


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	4,456	5,187	5,389	5,295
2020	3,603	-	-	-
2021	111	173	1,078	2,154
2022	2,063	3,954	4,542	5,062
2023P	3,957	4,679	-	-

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trend by global region - EU Other

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

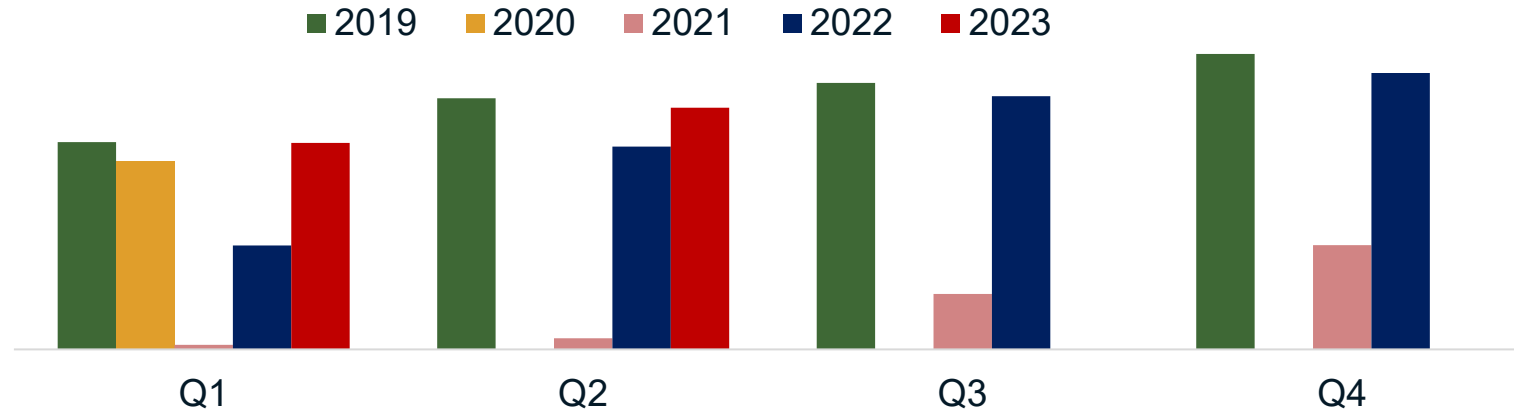


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	1,086	1,085	1,123	1,206
2020	869	-	-	-
2021	36	42	317	499
2022	506	746	931	1,156
2023P	1,011	974	-	-

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trend by global region – Rest of Europe

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

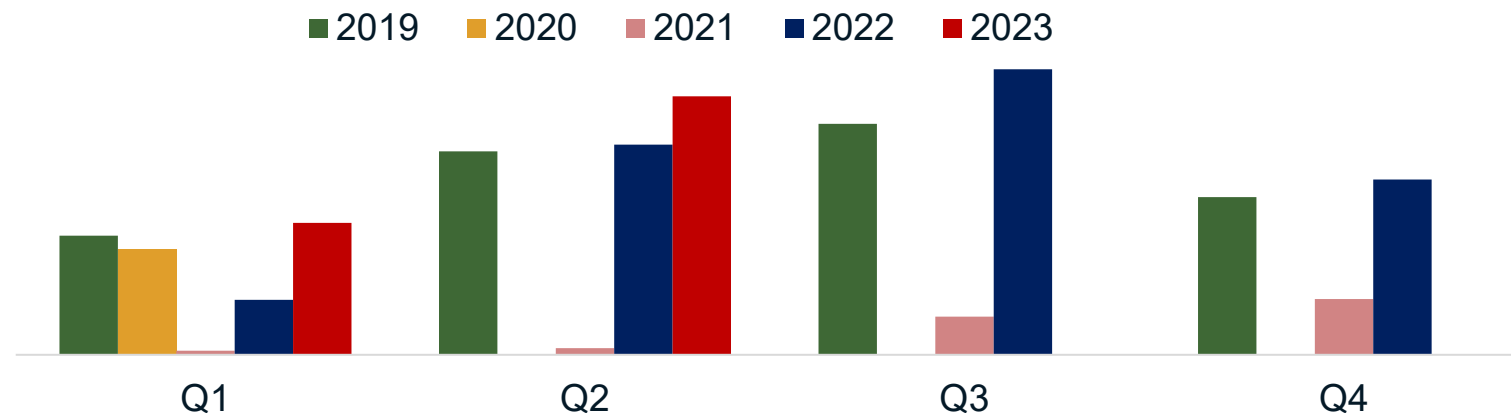


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	501	607	644	714
2020	455	-	-	-
2021	11	27	134	252
2022	251	490	612	668
2023P	499	584		

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# Detailed quarterly trend by global region - North America

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

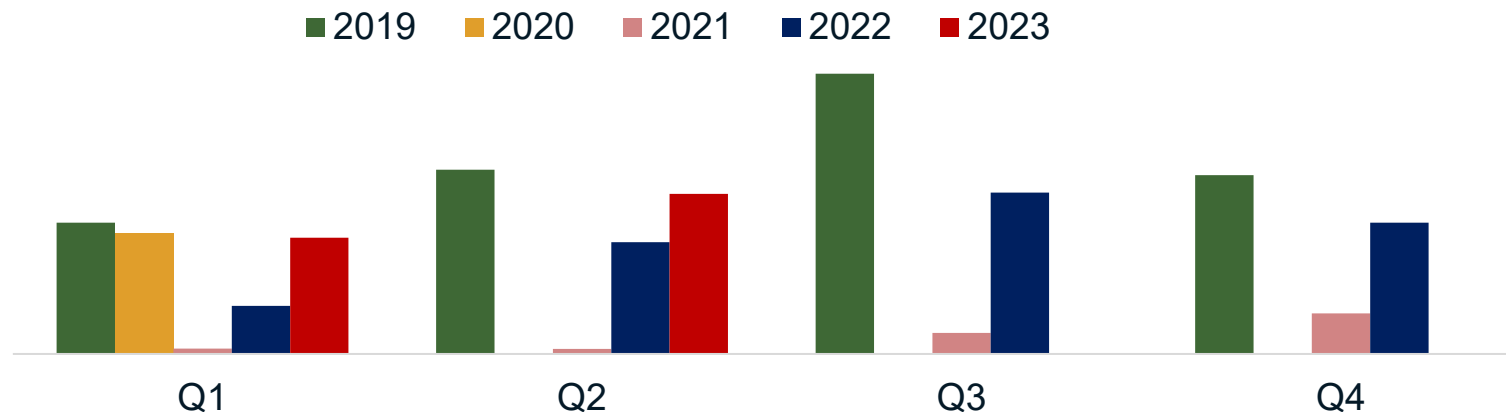


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2019	900	1,537	1,745	1,191
2020	794	-	-	-
2021	31	51	289	421
2022	415	1,587	2,157	1,324
2023P	997	1,952		

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# 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	-	-

**Note:** Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

# 4. Monthly data (Apr, May, Jun 2023)

Provisional Q2 2023

# Monthly 2022 Headlines

Total Visits (000)	2023P	Change vs. 2019	Change vs. 2022
April 2023	3,118	-3%	38%
May 2023	3,292	-4%	21%
June 2023	3,472	-7%	17%
Last 3 months (Apr-Jun 2023)	9,882	-5%	24%

Total Spend (£m)	2023P	Change vs. 2019	Change vs. 2022
April 2023	2,325	27%	25%
May 2023	2,649	13%	19%
June 2023	2,925	7%	6%
Last 3 months (Apr-Jun 2023)	7,899	15%	15%

- **Visits:** Visits increased month-on-month from April to June 2023. **April 2023** saw 3.1m inbound visits to the UK, down 3% vs April 2019. Visits in **May 2023** increased to 3.3m (down 4% vs 2019) and further to 3.5m in June 2023 (down 7% vs 2019). Visits totalled 9.9m in Q2 2023, down 5% vs Q2 2019.
- **Spend:** Visitor spend also increased each consecutive month in Q2 and reached new records. In nominal terms, visitors spent £2.3bn in **April**, up 27% vs April 2019 increasing to £2.6bn in **May** and £2.9bn in **June**. Overall, Q2 2023 saw inbound visitors spend a record £7.9bn in the UK, up 15% vs Q2 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 – Apr, May, Jun 2023

Total Visits (000)	April 2023P	Change vs. 2019	Change vs. 2022	May 2023P	Change vs. 2019	Change vs. 2022	June 2023P	Change vs. 2019	Change vs. 2022	Last 3 months (Apr-Jun 2023P)	Change vs. 2019	Change vs. 2022
<b>Holiday</b>	1,349	-4%	58%	1,456	+5%	28%	1,583	-8%	21%	4,388	-3%	33%
<b>VFR</b>	1,002	+4%	17%	1,027	-7%	4%	1,080	+16%	6%	3,109	+4%	9%
<b>Business</b>	529	-12%	42%	567	-25%	29%	597	-28%	25%	1,693	-23%	31%
<b>Miscellaneous</b>	239	+3%	41%	242	+23%	45%	211	-14%	17%	692	+3%	34%

- **Holiday** visits continued to grow into Q2 and reached 1.3m in April 2023 (down 4% vs April 2019). They reached 1.5m visits in May, up 5% vs May 2019 and 1.6m visits in June, down 8% vs June 2019.
- **Visits to friends and relatives (VFR)** surpassed 2019 levels in April at 1.0m visits (up 4% vs April 2019). In May, they fell back down below 2019 levels but bounced back in June to reach 1.1m visits (up 16% vs 2019 and just shy of the June 2018 record). Overall, VFR visits reached a new record of 3.1m visits in Q2 2023.
- Whilst **business** visits increased each month in Q2, they were still recovering at the slowest pace vs other journey purposes. Visits were just 12% below 2019 in April but showed slower recovery in May and June (when comparing to same months in 2019).
- All other visits under '**miscellaneous**', which includes study, contributed 692,000 visits in Q2 2023, up 3% vs Q2 2019. April and May saw misc visits above pre-pandemic levels but June showed visits down 14% vs 2019.

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 – Apr, May, Jun 2023

Total Visits (000)	April 2023P	Change vs. 2019	Change vs. 2022	May 2023P	Change vs. 2019	Change vs. 2022	June 2023P	Change vs. 2019	Change vs. 2022	Last 3 months (Apr-Jun 2023P)	Change vs. 2019	Change vs. 2022
<b>Total Europe</b>	2,196	-9%	34%	2,065	-7%	13%	1,976	-12%	14%	6,237	-9%	20%
→ EU	1,990	-9%	36%	1,859	-9%	11%	1,805	-12%	15%	5,654	-10%	20%
→ EU15	1,710	-8%	36%	1,480	-9%	8%	1,490	-13%	12%	4,680	-10%	18%
→ Other EU	281	-19%	33%	378	-5%	30%	316	-7%	30%	975	-10%	31%
→ Rest of Europe	205	-6%	21%	207	+9%	24%	170	-15%	10%	582	-4%	19%
<b>North America</b>	497	+56%	47%	683	+20%	34%	771	+19%	4%	1,951	+27%	23%
<b>Rest of World</b>	425	-8%	52%	545	-16%	39%	724	-13%	42%	1,694	-13%	43%

- The UK welcomed 2.2m visits from **Europe** in April 2023, down 9% vs April 2019. They dipped slightly in May and June to reach 2.1m and 2.0m visits respectively. Across Q2 2023 European visits were down 9% vs Q2 2019.
- Visits from **North America** continued to reach new records across all 3 months of Q2 2023. Visits grew in each month from 497,000 in April 2023 to 771,000 visits in June 2023.
- Those visiting from the **Rest of World** saw visits increase in each month, contributing 1.7m visits to UK inbound tourism in Q2 2023, down 13% vs 2019.

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.

## 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 **19<sup>th</sup> October 2023**. The report covers provisional Q2 2023 data including the individual months. Comparisons have been made to 2019 to show the rate of recovery, and also 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](#)

# Sample size

Sample by country of residence	Q2 2023
Australia	402
Austria	85
Belgium	175
Brazil	82
Canada	372
China	50
Denmark	156
France	697
Germany	817
GCC*	251
Hong Kong	86
India	216
Irish Republic	848
Italy	306
Japan	54
Netherlands	509
New Zealand	85
Norway	159
Poland	341
Romania	130
Saudi Arabia	46
South Korea	39
Spain	435
Sweden	201
Switzerland	238
United Arab Emirates	119
USA	2,148

Time period	Sample
Q2 2023	10,392

Sample	Q2 2023
Holiday	4,387
VFR	1,693
Business	3,110
Study	89
Miscellaneous (Excl. study)	603

Sample	Q2 2023
Total Europe	5,853
→ EU Total	5,286
→ EU 15	4,488
→ Other EU	798
→ Rest of Europe	567
North America	2,520
Rest of World	2,019

- **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.

# 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 Q2 2023 (April to June)

International Passenger Survey by the ONS

(Published 19<sup>th</sup> October 2023)

