

Quarterly Inbound Update & Full Year 2021

Q4 2021 and Full Year 2021

International Passenger Survey by the ONS

(published 15th June 2022)

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1. 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 **15th June 2022**.

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, but this has been severely impacted during 2021 due to COVID-19.

Please note that sample sizes at the quarterly level for some analysis and comparisons can be low and results should be treated with caution, especially for spending. For absolute clarity we have included sample sizes within this report where breakdowns have been provided.

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 percentage changes in spend are nominal.

Refer to the [ONS website](#) for more on IPS methodology and UK outbound travel.

Important notice – continued impact of COVID-19 on IPS

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. The data was not made available by Mode, therefore we are unable to compare current AIR data to this period in 2020 and have opted to compare AIR data to 2019 instead.
- **2021** – revised 2021 published today will contain all collected by the ONS throughout 2021 but with the following caveats that no data was collected for those travelling to the UK by Eurotunnel and data for those travelling via Dover was only collected from Q3. The first section of the report will show the total UK level data that the and the second section will cover the AIR market i.e. those departing the UK via an airport as the air data is the only mode (out of air, sea and tunnel) which has a complete dataset for 2021. To ensure accurate comparisons, this report compares any 2021 data to 2019 data. The sample for the first three quarters of 2021 was lower than usual, especially in Q1, so caution should be used when interpreting results.

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
- **AIR ONLY** – the second part of this publication contains data filtered to those who departed the UK on a flight. IPS interviewing was not able to take place at all sea and tunnel ports between January and December 2021 so air data is the most 'complete' set of data (out of sea, tunnel, air) for the mode data in 2021.

2. Latest inbound UK and market statistics Annual 2021 (January – December)

TOTAL UK data

Notes on Total UK level data

- This section covers the data that the [ONS have published](#) for the Total UK level.
- Please note the following when interpreting the IPS 2021 data:
 - There were no IPS interviews at Eurotunnel in 2021 so the dataset excludes all passengers travelling on this mode of transport
 - Interviews at Dover only started in Q3 2021
 - Data is not seasonally adjusted
 - Please note the low sample sizes for Q1-Q3 in the table below

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Annual
Sample size	1,346	3,994	6,167	9,425	20,932

Total UK 2021 – visits, nights and spend

Please see notes on slide 5 when interpreting the 2021 data

Total	Q1 2021	Q2 2021	Q3 2021	Q4 2021	2021
Visits	245,000	346,000	2.0 million	3.6 million	6.2 million
Spend	£287 million	£545 million	£1.9 billion	£3.0 billion	£5.8 billion
Nights	12.0 million	14.8 million	36.4 million	36.1 million	99.3 million

- There were 6.2 million inbound visits to the UK in 2021 with a gradual increase throughout the year as travel restrictions to the UK loosened and international travel resumed; 32% of visits were in Q3 and 59% were in Q4.
- Visitors spent £5.8bn in 2021 with Q4 generating the most spend at £3.0bn.
- In total, 99.3 million nights were spent in the UK in 2021.
- The average spend per visit in 2021 was £934, but this excluded any spend by those departing the UK by the Eurotunnel and those departing by Dover (for the first half of 2021).

Total UK 2021 - visits by journey purpose

Please see notes on slide 5 when interpreting the 2021 data

Journey Purpose	Q1 2021	Q2 2021	Q3 2021	Q4 2021	2021
Holiday	8,000	17,000	277,000	806,000	1.1 million
VFR	151,000	216,000	1.1. million	1.8 million	3.3 million
Business	34,000	56,000	373,000	748,000	1.2 million
Study	12,000	20,000	51,000	59,000	142,000
Miscellaneous (Excl. study)	39,000	38,000	125,000	203,000	405,000

- 2021 saw all journey purposes at a fraction of normal levels due to the COVID-19 pandemic.
- As might be expected due to travel restrictions for the majority of the year, visits to friends and relatives made up over half of visits in 2021 with 3.3 million visits throughout the year.
- Business visits accounted for 20% of total inbound visits (1.2 million) followed by holiday visits, accounting for 18% of visits (1.1 million).
- Study visits, traditionally a smaller inbound segment to the UK, totalled at 142,000.
- All other visits, under 'miscellaneous' accounted for 405,000 visits in 2021.

Total UK 2021 – spend by journey purpose

Please see notes on slide 5 when interpreting the 2021 data

Journey Purpose	Q1 2021	Q2 2021	Q3 2021	Q4 2021	2021
Holiday	£11 million	£31 million	£327 million	£841 million	£1.2 billion
VFR	£152 million	£188 million	£818 million	£1.2 billion	£2.3 billion
Business	£38 million	£88 million	£230 million	£550 million	£906 million
Study	£41 million	£120 million	£427 million	£253 million	£840 million
Miscellaneous (Excl. study)	£45 million	£118 million	£119 million	£218 million	£501 million

- Visits to friends and relatives brought in £2.3 billion to the UK in 2021, 40% of total inbound spend.
- £1.2 billion was spent by those visiting the UK for a holiday which equated to 21% of total spend
- Business visits brought in £906 million.
- Those visiting the UK to study spent £840 million in total with the majority of spend falling into Q3.
- Over £500 million was spent by those visiting the UK for miscellaneous purposes.

Total UK 2021 – visits by global region

Please see notes on slide 5 when interpreting the 2021 data

Global Region	Q1 2021	Q2 2021	Q3 2021	Q4 2021	2021
Total Europe	158,000	242,000	1.4 million	2.8 million	4.6 million
→ EU Total	147,000	216,000	1.3 million	2.5 million	4.2 million
→ EU 15	111,000	173,000	980,000	2.0 million	3.3 million
→ Other EU	36,000	42,000	287,000	482,000	847,000
→ Rest of Europe	11,000	27,000	126,000	244,000	409,000
North America	31,000	51,000	314,000	418,000	813,000
Rest of World	56,000	53,000	261,000	448,000	817,000

- By global region, the majority of visits were from Europe in 2021 at 4.6 million with over 60% falling in Q4, although this excludes visits by the Eurotunnel which is a popular route for those visiting from Europe.
- Within Europe, there were 4.2 million visits from EU markets vs 409,000 from the Rest of Europe in 2021.
- There were 813,000 visits from North America, with over 50% of visits in Q4.
- The remaining visits from the Rest of the World totalled at 817,000 in 2021.

Total UK 2021 – spend by global region

Please see notes on slide 5 when interpreting the 2021 data

Global Region	Q1 2021	Q2 2021	Q3 2021	Q4 2021	2021
Total Europe	£143 million	£240 million	£767 million	£1.5 billion	£2.7 billion
→ EU Total	£127 million	£205 million	£666 million	£1.3 billion	£2.3 billion
→ EU 15	£86 million	£162 million	£549 million	£1.1 billion	£1.9 billion
→ Other EU	£41 million	£44 million	£118 million	£203 million	£405 million
→ Rest of Europe	£16 million	£34 million	£100 million	£202 million	£353 million
North America	£31 million	£68 million	£320 million	£502 million	£921 million
Rest of World	£113 million	£231 million	£817 million	£993 million	£2.2 billion

- Visitors from Europe spent £2.7 billion in 2021, accounting for 46% of total inbound spend.
- Spend from North America totalled £921 million which was 16% of total spend.
- £2.2 billion spend came from the rest of the world, accounting for the remaining 38% of spend.

Total UK 2021 – visits by selected markets

Visits (000) - Please see notes on slide 5 when interpreting the 2021 data

Country of residence	Q1 2021	Q2 2021	Q3 2021	Q4 2021	2021	2021 sample
Australia	1	1	2	19	23	108
Belgium	2	6	31	101	139	369
Brazil	3	1	2	13	19	84
Canada	2	4	39	70	115	555
China	1	4	32	18	55	103
Denmark	2	4	19	64	90	353
France	13	24	138	435	610	1,620
Germany	10	19	159	200	388	1,299
GCC*	8	9	43	148	208	983
Hong Kong	1	1	3	6	12	75
India	6	3	19	40	68	252
Irish Republic	24	47	225	389	685	2,296
Italy	10	13	70	147	241	736
Japan	2	2	24	5	32	61
Netherlands	13	13	79	169	274	788
New Zealand	1	1	2	5	8	48
Norway	1	2	14	57	74	240
Poland	8	10	124	172	314	687
Romania	13	16	55	101	185	417
Russia	2	4	9	7	21	107
Spain	24	25	143	300	492	1,607
Sweden	2	5	36	59	101	420
Switzerland	2	11	49	82	145	592
USA	29	47	275	348	699	3,065

- The top inbound markets for visits to the UK in 2021 were the USA, Irish Republic, France, Spain and Germany.
- An example of how to read this table is ‘there were 23,000 visits from Australia to the UK in 2021’ or for the US it would be ‘there were 699,000 visits from the US to the UK in 2021’.
- **GCC*** includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE)
- **Sample advice** - If 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.

Total UK 2021 – spend by selected markets

Spend (£m) - Please see notes on slide 5 when interpreting the 2021 data

Country of residence	Q1 2021	Q2 2021	Q3 2021	Q4 2021	2021	2021 sample
Australia	£1	£5	£4	£24	£33	108
Belgium	£1	£7	£17	£77	£102	369
Brazil	£3	£2	£3	£17	£24	84
Canada	£2	£9	£41	£81	£134	555
China	£6	£43	£359	£86	£494	103
Denmark	£3	£4	£13	£35	£55	353
France	£12	£28	£68	£267	£374	1,620
Germany	£8	£21	£91	£115	£235	1,299
GCC*	£26	£52	£130	£412	£620	983
Hong Kong	£5	£7	£8	£22	£41	75
India	£8	£5	£36	£88	£137	252
Irish Republic	£13	£30	£103	£149	£295	2,296
Italy	£11	£15	£48	£88	£161	736
Japan	£5	£3	£32	£8	£48	61
Netherlands	£3	£12	£47	£86	£147	788
New Zealand	£6	£1	£4	£4	£15	48
Norway	£1	£4	£8	£49	£62	240
Poland	£8	£11	£36	£44	£98	687
Romania	£21	£17	£29	£41	£107	417
Russia	£2	£4	£5	£6	£17	107
Spain	£21	£25	£78	£153	£276	1,607
Sweden	£2	£4	£21	£41	£68	420
Switzerland	£3	£12	£50	£58	£124	592
USA	£29	£59	£279	£421	£788	3,065

- The top inbound markets to the UK for spend in 2021 were the USA, China, France, the Irish Republic and Spain.
- Whilst the overall visits from China were lower in 2021 due to the pandemic, there were still a significant number of study visitors who stayed for a considerable amount of time, which is why the spend figure for China is so high.
- An example of how to read this table is 'Australians spent £33m in the UK in 2021' or for the US it would be 'Americans spent £788m in 2021 in the UK'.
- **GCC*** includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE)
- **Sample advice** - If 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.

3. Latest inbound UK and market statistics Annual 2021 (January – December)

AIR ONLY UK data

Notes on AIR ONLY UK level data

- This section covers the data that the [ONS have published](#) for the UK for those who have departed by air only in 2021. This section has been included to allow us to make comparison to pre-COVID stats i.e. 2019
- Please note the following when interpreting the IPS 2021 air data:
 - Data includes those departing to the UK by air only and excludes data from sea and tunnel ports
 - Data is not seasonally adjusted
 - Please note the low sample sizes for Q1-Q3 in the table below

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Annual
Sample size	1,210	3,652	5,325	8,338	18,525

AIR only UK 2021 – visits, nights and spend

Please note the data on this slide is for AIR only

Total	Q1 2021	% change vs. Q1 2019	Q2 2021	% change vs. Q2 2019	Q3 2021	% change vs. Q3 2019	Q4 2021	% change vs. Q4 2019	2021	% change vs. 2019
Visits	207,000	-97%	289,000	-96%	1.5 million	-83%	2.7 million	-67%	4.8 million	-85%
Spend	£264 million	-94%	£495 million	-92%	£1.8 billion	-78%	£2.5 billion	-62%	£5.1 billion	-80%
Nights	11.0 million	-74%	13.5 million	-77%	33.3 million	-62%	30.5 million	-49%	88.3 million	-65%

- There were 4.8 million inbound visits by air to the UK in 2021 - down 85% compared to 2019.
- Spend was down 80% on 2019 with visitors spending £5.1 billion throughout the year, half of which fell in Q4.
- In total, 88.3 million nights were spend in the UK by inbound air visitors during 2021, down 65% on 2019.
- The average spend per visit in 2021, amongst those who departed the UK via an airport, was £1,065 (vs £776 in 2019).

AIR only UK 2021 – visits by journey purpose

Please note the data on this slide is for AIR only

Journey Purpose	Q1 2021	% change vs. Q1 2019	Q2 2021	% change vs. Q2 2019	Q3 2021	% change vs. Q3 2019	Q4 2021	% change vs. Q4 2019	2021	% change vs. 2019
Holiday	8,000	-99.7%	14,000	-99.6%	233,000	-94%	651,000	-80%	905,000	-93%
VFR	136,000	-94%	180,000	-93%	983,000	-67%	1.5 million	-48%	2.8 million	-74%
Business	21,000	-98%	45,000	-97%	166,000	-89%	357,000	-77%	589,000	-90%
Study	12,000	-84%	19,000	-87%	48,000	-76%	45,000	-67%	123,000	-78%
Miscellaneous (Excl. study)	31,000	-92%	31,000	-93%	114,000	-80%	182,000	-63%	358,000	-81%

- Holiday visits to the UK by air were most impacted in 2021 with only 905,000 visits in 2021.
- Business visits were also heavily impacted with just 589,000 visits by air in 2021.
- Visits to friends and relatives was the strongest journey purpose during 2021 accounting for 2.8 million visits.
- Study visits were down by less than the total, 78% lower than 2019.

AIR only UK 2021 – spend by journey purpose

Please note the data on this slide is for AIR only

Journey Purpose	Q1 2021	% change vs. Q1 2019	Q2 2021	% change vs. Q2 2019	Q3 2021	% change vs. Q3 2019	Q4 2021	% change vs. Q4 2019	2021	% change vs. 2019
Holiday	£10 million	-99%	£26 million	-99%	£286 million	-93%	£698 million	-75%	£1.0 billion	-91%
VFR	£140 million	-87%	£164 million	-89%	£743 million	-60%	£1.0 billion	-32%	£2.1 billion	-64%
Business	£33 million	-97%	£77 million	-94%	£194 million	-85%	£424 million	-71%	£729 million	-86%
Study	£40 million	-65%	£115 million	-57%	£423 million	-13%	£210 million	-59%	£788 million	-43%
Miscellaneous (Excl. study)	£41 million	-82%	£111 million	-56%	£113 million	-69%	£205 million	-54%	£470 million	-64%

- Those visiting friends and relatives spent £2.1 billion in 2021, down 64% on 2019.
- Holiday spend took a big hit, down 91% in 2021 at £1 billion.
- Business visits accounted for £729 million spend in 2021, down 86% on 2019.
- Spend from study visits recovered the most; down 43% on 2019 bringing in £788 million in 2021.

AIR only UK 2021 – visits by global region

Please note the data on this slide is for AIR only

Global Region	Q1 2021	% change vs. Q1 2019	Q2 2021	% change vs. Q2 2019	Q3 2021	% change vs. Q3 2019	Q4 2021	% change vs. Q4 2019	2021	% change vs. 2019
Total Europe	121,000	-97%	186,000	-96%	980,000	-80%	2.0 million	-65%	3.3 million	-84%
→ EU Total	110,000	-97%	160,000	-96%	886,000	-80%	1.8 million	-64%	2.9 million	-84%
→ EU 15	74,000	-98%	118,000	-97%	730,000	-80%	1.5 million	-64%	2.4 million	-84%
→ Other EU	36,000	-94%	41,000	-94%	156,000	-78%	290 million	-66%	523,000	-82%
→ Rest of Europe	11,000	-98%	27,000	-95%	94,000	-84%	207,000	-69%	339,000	-85%
North America	31,000	-96%	50,000	-96%	305,000	-80%	360,000	-66%	746,000	-84%
Rest of World	55,000	-96%	52,000	-97%	258,000	-90%	416,000	-76%	782,000	-89%

- Visits from all regions by air were down between 82% and 89% in 2021 when compared to 2019.
- There were 3.3 million visits from Europe with 2.9 million from the EU vs 339,000 from the Rest of Europe.
- Visits from North America totalled 746,000, down 84% on 2019.
- The Rest of the World saw the smallest recovery with 782,000 visits, down 89% on 2019.

AIR only UK 2021 – spend by global region

Please note the data on this slide is for AIR only

Global Region	Q1 2021	% change vs. Q1 2019	Q2 2021	% change vs. Q2 2019	Q3 2021	% change vs. Q3 2019	Q4 2021	% change vs. Q4 2019	2021	% change vs. 2019
Total Europe	£121 million	-93%	£193 million	-92%	£625 million	-78%	£1.2 billion	-60%	£2.1 billion	-79%
→ EU Total	£105 million	-93%	£159 million	-92%	£534 million	-77%	£957 million	-60%	£1.8 billion	-79%
→ EU 15	£65 million	-95%	£115 million	-93%	£430 million	-77%	£777 million	-59%	£1.4 billion	-79%
→ Other EU	£39 million	-85%	£43 million	-89%	£104 million	-78%	£180 million	-64%	£367 million	-78%
→ Rest of Europe	£16 million	-94%	£34 million	-91%	£91 million	-82%	£193 million	-61%	£335 million	-80%
North America	£31 million	-96%	£67 million	-95%	£310 million	-79%	£449 million	-52%	£858 million	-81%
Rest of World	£112 million	-93%	£230 million	-90%	£809 million	-78%	£949 million	-67%	£2.1 billion	-80%

- Spend from global regions fell between -78% and -81% in 2021 when compared to 2019.
- £2.1 billion was spent by those visiting from Europe with the EU accounting for £1.8 billion of that spend.
- Visitors from North America spent £858 million, down 81% on 2019 whilst the Rest of World contributed £2.1 billion to total UK air spend in 2021.

AIR only UK 2021 – visits (000) by selected markets

Visits (000) - Please note the data on this slide is for AIR only

Country of residence	2019	2021	% change vs 2019	2021 sample
Australia	918	20	-98%	103
Belgium	216	27	-87%	115
Brazil	223	16	-93%	80
Canada	794	108	-86%	542
China	809	55	-93%	102
Denmark	665	88	-87%	350
France	1,595	235	-85%	783
Germany	2,514	317	-87%	1,178
GCC*	1,179	199	-83%	971
Hong Kong	392	10	-97%	72
India	617	66	-89%	249
Irish Republic	2,238	530	-76%	2,158
Italy	2,116	232	-89%	723
Japan	339	30	-91%	60
Netherlands	1,173	153	-87%	534
New Zealand	158	7	-96%	45
Norway	634	74	-88%	238
Poland	983	146	-85%	484
Romania	458	100	-78%	320
Russia	176	16	-91%	101
Spain	2,202	454	-79%	1,504
Sweden	775	100	-87%	417
Switzerland	882	132	-85%	572
USA	3,916	638	-84%	2,961

- The top inbound markets for visits in 2021 for those departing the UK by air were the USA, Irish Republic, Spain, Germany and France.
- An example of how to read this table is ‘there were 20,000 visits from Australia to the UK in 2021’ or ‘for the US there were 638,000 visits’.
- **GCC*** includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE)
- **Sample advice** - If 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.

AIR only UK 2021 – spend (£m) by selected markets

Spend (£m) - Please note the data on this slide is for AIR only

Country of residence	2019	2021	% change vs 2019	2021 sample
Australia	£1,037	£28	-97%	103
Belgium	£76	£18	-77%	115
Brazil	£204	£20	-90%	80
Canada	£629	£120	-81%	542
China	£1,593	£494	-69%	102
Denmark	£318	£52	-84%	350
France	£676	£147	-78%	783
Germany	£1,192	£193	-84%	1,178
GCC*	£2,573	£602	-77%	971
Hong Kong	£541	£39	-93%	72
India	£738	£134	-82%	249
Irish Republic	£732	£238	-67%	2,158
Italy	£1,085	£159	-85%	723
Japan	£338	£48	-86%	60
Netherlands	£479	£78	-84%	534
New Zealand	£152	£14	-91%	45
Norway	£434	£61	-86%	238
Poland	£426	£79	-82%	484
Romania	£355	£97	-73%	320
Russia	£179	£17	-90%	101
Spain	£924	£260	-72%	1,504
Sweden	£389	£68	-83%	417
Switzerland	£544	£112	-79%	572
USA	£3,822	£737	-81%	2,961

- The top inbound markets for spend in 2021 for those departing the UK by air were the USA, China, Spain, Irish Republic and Germany.
- Whilst the overall visits from China were lower in 2021 due to the pandemic, there were still a significant number of study visitors who stayed for a considerable amount of time, which is why the spend figure for China is so high.
- An example of how to read this table is ‘there was £28 million spend from Australia to the UK in 2021 or US visitors spent £737 million in 2021.
- **GCC*** includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE)
- **Sample advice** - If 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.