

Regional Quarterly Inbound Update: Q2 2022

International Passenger Survey by the ONS
(Published 7th November 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 **7th November 2022**. This data covers revised January - March 2022 (Q1 2022) and first release April - June 2022 (Q2 2022) data but may be revised again for the annual 2022 release.

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.

Due in part to an unusual pattern of travellers and traveller behaviour as we recover from the pandemic, we are seeing wide variations in region/nation results, especially for spending. We advise caution when interpreting these results.

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.
- From 2021 data excludes the Irish land boarder data.

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** – data published for 2021 should be interpreted with the 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. In addition, no estimates are included for any travel across the Irish border. Please see [our 2021 inbound data page](#) for more information.
- **Q1 and Q2 2022** – the ONS were unable to restart interviewing at Eurotunnel during this period due to COVID-19 restrictions so data for this timeframe excludes travel via this port. In addition, no estimates are included for any travel across the Irish border. In section 2, we have carried out some additional analysis to exclude Eurotunnel from the 2019 IPS data so that we can make direct comparison between 2019 and 2022.

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

2. Latest inbound UK Q2 2022 (Apr-Jun)

Regional UK data

Regional summary Q2 2022 – Visits (000)

Please see notes on slide 5 when interpreting the 2022 data

Region	Q1 2022 Visits (000)	Q2 2022 Visits (000)	YTD 2022 Visits (000)
London	1,935	4,280	6,215
Rest Of England	1,738	3,233	4,971
North East	46	138	185
North West	341	707	1,048
Yorkshire	137	238	376
West Midlands	232	403	635
East Midlands	139	210	350
East Of England	323	480	803
South West	221	542	763
South East	414	877	1,291
Scotland	276	834	1,110
Wales	74	186	260
Total UK	3,911	8,045	11,956

- Visits to Britain’s nations and regions were still heavily impacted by the ongoing COVID-19 pandemic, namely the Omicron variant, in Q1 2022.
- Visit levels increased into Q2 2022 with all nations and regions posting positive growth, compared to Q1 2022.
- There were 4.3 million visits to London in Q2 2022, representing 53% of inbound visits to the UK whilst the Rest of England received 3.2 million visits (40% of inbound visits).
- Behind London, the most visited English regions between April to June 2022 were the South East and North West.
- In the first half of 2022 Scotland welcomed over 1 million visits (1.1 million) whilst Wales received 260,000 inbound visits – accounting for 10% and 2% of total inbound visits in the first 6 months of 2022, respectively.

(Sample advice – sample at nation and region levels can vary. Please refer to slide 10 for more sample information.)

Regional summary Q2 2022 – Spend (£m)

Please see notes on slide 5 when interpreting the 2022 data

Region	Q1 2022 Spend (£m)	Q2 2022 Spend (£m)	YTD 2022 Spend (£m)
London	£1,753	£3,721	£5,474
Rest Of England	£947	£2,036	£2,983
North East	£42	£56	£97
North West	£169	£411	£607
Yorkshire	£67	£142	£209
West Midlands	£86	£211	£297
East Midlands	£60	£111	£171
East Of England	£116	£256	£373
South West	£133	£312	£445
South East	£247	£534	£781
Scotland	£202	£901	£1,103
Wales	£47	£99	£146
Total UK	£2,967	£6,832	£9,880

- As was seen with visit levels, inbound visitor spending in Q2 2022 in the nations and regions of the UK all posted much improved results compared to Q1 2022.
- In Q2 2022 (April-June 2022) inbound visitors spent a total of £6.8bn in the UK, up 130% on Q1 2022 and in line with the total spent in the pre pandemic times of Q2 2019.
- Many GB nations and English regions have reported spend at least doubling in Q2 2022, compared to Q1 2022.
- Visitors to Scotland spent £1.1bn in the first half of 2022 (13% of all UK spend), whilst visitors to Wales spent £146m during the same time period (1% of all UK spend).

(Sample advice – sample at nation and region levels can vary. Please refer to slide 10 for more sample information.)

Regional sample: 2022

Please see notes on slide 5 when interpreting the 2022 data

Region	Q1 2022 Sample	Q2 2022 Sample	YTD 2022 Sample
London	3,178	5,796	8,974
Rest Of England	3,202	4,328	7,530
North East	82	170	252
North West	661	994	1,655
Yorkshire	226	320	546
West Midlands	473	553	1,026
East Midlands	228	266	494
East Of England	450	520	970
South West	497	805	1,302
South East	804	1,191	1,995
Scotland	488	1,127	1,615
Wales	147	244	391
Total UK	6,776	10,748	17,524

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.

International Passenger Survey by the ONS 2022. The number of visits by region does not add up to the total as some visitors stayed in more than one region.

**3. Latest inbound UK:
Q1 & Q2 2022 vs 2019 - excluding Eurotunnel**

Regional UK data

Regional summary: Q1 & Q2 2022 vs 2019 - Visits (000)

Please note the data on this page excludes those travelling via Eurotunnel

Region	Q1 2019 Visits (000)	Q1 2022 Visits (000)	% change	Q2 2019 Visits (000)	Q2 2022 Visits (000)	% change	YTD Visits (000)	YTD Visits (000)	% change
London	4,441	1,935	-56%	5,233	4,280	-18%	9,674	6,215	-36%
Rest of England	3,031	1,738	-43%	4,173	3,233	-23%	7,204	4,971	-31%
North East	91	46	-49%	147	138	-6%	238	185	-22%
North West	664	341	-49%	910	707	-22%	1,574	1,048	-33%
Yorkshire	242	137	-43%	298	238	-20%	540	376	-30%
West Midlands	496	232	-53%	567	403	-29%	1,063	635	-40%
East Midlands	198	139	-30%	262	210	-20%	460	350	-24%
East Of England	399	323	-19%	531	480	-10%	930	803	-14%
South West	372	221	-40%	681	542	-20%	1,053	763	-28%
South East	834	414	-50%	1,345	877	-35%	2,179	1,291	-41%
Scotland	437	276	-37%	909	834	-8%	1,346	1,110	-18%
Wales	143	74	-48%	302	186	-38%	445	260	-42%
Total UK	7,932	3,911	-51%	9,936	8,045	-19%	17,868	11,956	-33%

- Despite results for Q2 visits by GB nation and English regions still being behind 2019 results, there were improvements in all nations and regions compared to results posted in Q1.
- In the first 6 months of 2022, compared to the start of 2019, visit levels (excluding Eurotunnel) have recovered to 2/3rds (67%) of the levels seen at the start of 2019. East of England is leading the way showing the strongest recovery of the English regions.
- Visits to Scotland were down by 8% in Q2, compared to Q2 2019, whilst visits to Wales were down 38%.

(Sample advice – sample at nation and region levels can vary. Please refer to slide 14 for more sample information.)

Regional summary: Q1 & Q2 2022 vs 2019 - Spend (£m)

Please note the data on this page excludes those travelling via Eurotunnel

Region	Q1 2019 Spend (£m)	Q1 2022 Spend (£m)	% change	Q2 2019 Spend (£m)	Q2 2022 Spend (£m)	% change	YTD Spend (£m)	YTD Spend (£m)	% change
London	3,076	1,753	-43%	3,670	3,721	1%	6,746	5,474	-19%
Rest of England	1,287	947	-26%	2,133	2,036	-5%	3,420	2,983	-13%
North East	39	42	7%	83	56	-33%	122	97	-20%
North West	276	196	-29%	453	411	-9%	729	607	-17%
Yorkshire	74	67	-10%	102	142	39%	176	209	19%
West Midlands	169	86	-49%	180	211	17%	349	297	-15%
East Midlands	67	60	-10%	116	111	-4%	183	171	-6%
East Of England	142	116	-18%	262	256	-2%	404	373	-8%
South West	156	133	-15%	340	312	-8%	496	445	-10%
South East	366	247	-33%	597	534	-11%	963	781	-19%
Scotland	206	202	-2%	709	901	27%	915	1,103	21%
Wales	54	47	-13%	131	99	-24%	185	146	-21%
Total UK	4,702	2,967	-37%	6,787	6,832	1%	11,490	9,800	-15%

- Total UK spend recovered in Q2 2022 to align with Q2 2019 spend.
- In Q2 2022, compared to Q2 2019 almost all English regions made ground compared to Q1 2019 vs. Q1 2022. The exception was the North East (but please note small sample).
- Spend in Scotland in Q2 made gains on Q2 2019 and over the first 6 months of 2022, spend improved on 2019 results. Inbound spending in Wales was down in Q1 and Q2 in 2022 compared to same quarters in 2019.

(Sample advice – sample at nation and region levels can vary. Please refer to slide 14 for more sample information.)

Regional sample: 2019 & 2022

Please note the data on this page excludes those travelling via Eurotunnel

Region	Q1 2019 Sample	Q1 2022 Sample	Q2 2019 Sample	Q2 2022 Sample
London	3,002	3,178	3,563	5,796
Rest Of England	2,282	3,202	3,037	4,328
North East	64	82	119	170
North West	475	661	716	994
Yorkshire	193	226	246	320
West Midlands	350	473	428	553
East Midlands	153	228	193	266
East Of England	211	450	310	520
South West	448	497	582	805
South East	617	804	910	1,191
Scotland	379	488	625	1,127
Wales	160	147	243	244
Total UK	5,577	6,776	6,896	10,748

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.

International Passenger Survey by the ONS 2019 & 2022 with VisitBritain analysis. The number of visits by region does not add up to the total as some visitors stayed in more than one region.