Quarterly and Annual Inbound Update
Total UK

Q4 2023 and Full Year 2023

International Passenger Survey by the ONS

(Published 17th May 2024)

Headline statistics for IPS 2023: Total UK

38.0m Visits
7% vs 2019
21% vs 2022

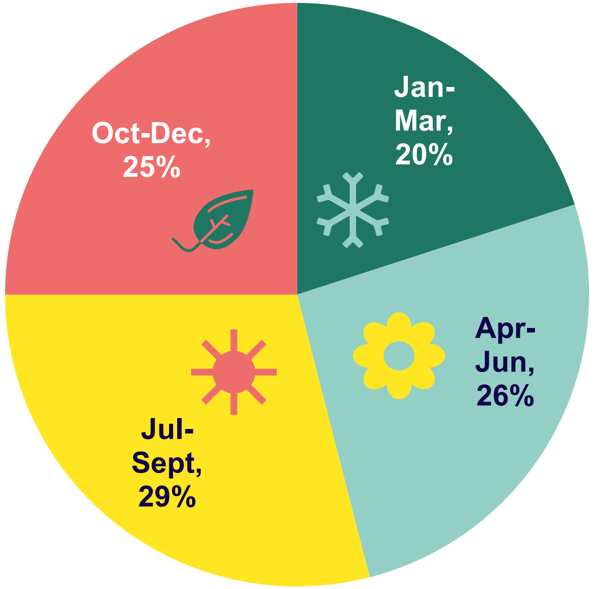
£31.1bn Spend
9% vs 2019
17% vs 2022

292.9m Nights
1% vs 2019
11% vs 2022

Average nights per visit: 7.7

Average spend per visit: £819

Average spend per night: £106



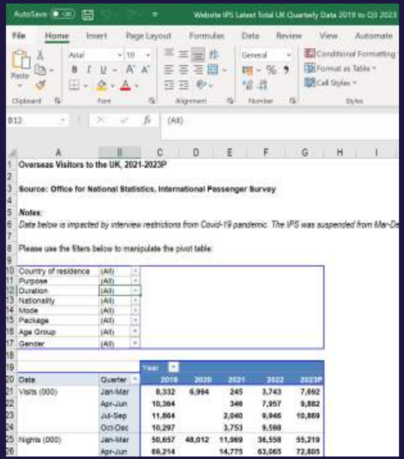
Holiday	Visit friends/ relatives	Business	Misc	Study
42%	34%	17%	6%	1%
15.9m	12.8m	6.5m	2.3m	404,000
£14.9bn	£8.1bn	£5.2bn	£1.6bn	£1.2bn

1st	USA	USA
2nd	France	Germany
3rd	Germany	France
4th	Irish Republic	Australia
5th	Spain	Irish Republic

Source: International Passenger Survey by the ONS.

Contents

Explore the IPS 2023 data in more detail on the VisitBritain website which includes pivot tables (Excel) and interactive dashboards.



Make sure you get all the latest figures and reports by signing-up for VisitBritain's e-newsletter.

About this data

This report is based on the latest final estimates from the International Passenger Survey (IPS) data released by the Office for National Statistics (ONS) on the morning of **17th May 2024.** This data refers to Q4 2023 and 2023 overall. Please note the ONS will be pausing monthly publications for Jan-Jun 2024 data so the next data release will be Q1 2024 due out in July 2024.

The IPS data is based on interviews with a sample of departing visitors. The number interviewed varies but is typically around 3,000 per month. Sample sizes at the quarterly level for some analysis and comparisons can be low and results should be treated with caution, especially for spending. Please refer to the ONS website for information on confidence levels.

Please also note:

- All data is sourced from the International Passenger Survey by the Office for National Statistics.
- All figures quoted are not “seasonally adjusted”.
- Numbers in some tables / charts may not sum due to rounding.
- All values and percentage changes in spend are in nominal terms (i.e. not taking inflation into account), unless stated
- 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.

1. Summary

Q4 2023 and 2023

Summary (1)

Inbound visits and real spend remained below 2019 levels throughout the year

Recovery of inbound visits in 2023 remained below 2019 levels but were up vs 2022, except for a decline in Q4

- In 2023, the UK welcomed **38.0m inbound visits**. Visits were below pre-pandemic levels (2019) by 7% but were up 21% vs 2022.
- Visits in Q4 were down 8% vs Q4 2019 (similar to previous quarters in 2023) and were also down 2% vs 2022.

Visitor spending set a new record in 2023 and was up in nominal terms but tracked down in real terms vs 2019 and 2022

- Inbound visitors **spent a record £31.1bn** during 2023, up 9% vs 2019 and up 17% vs 2022. Taking inflation into account, visitor spend was down 10% vs 2019 and up 9% vs 2022.
- Q4 spend totalled at £7.4bn down 2% vs 2019 and down 4% vs 2022. In real terms, Q4 spend was down 19% vs Q4 2019 and down 8% vs Q4 2022

Nights recovered to 2019 and 2022 levels in 2023 despite not recovering in Q4

- Overall, **292.9m nights** were spent in the UK in 2023, up 1% vs 2019 and up 11% vs 2022.
- Q4 nights reached 64.8m, down 3% vs Q4 2019 and down 10% vs Q4 2022.

Whilst trip duration was slightly above 2019 levels, the average spend per visit and per night are lower in real terms vs comparison years

- The **average spend per visit (SPV)** by inbound visitors was **£819** per visit in 2023, up 18% vs 2019 but down 3% vs 2022. In real terms, SPV was down 3% vs 2019 and down 10% vs 2022.
- Visitors stayed an **average of 7.7 nights** in 2023, which has been decreasing since 2021 but remains above 2019 (7.1 nights).
- Average **spend per night** was **£106** in 2023, up 8% vs 2019 and up 5% vs 2022. In real terms, SPN was down 11% vs 2019 and down 2% vs 2022.

International Passenger Survey by the ONS 2019-2023. Please note caveats to data on slide 29. All values and percentage changes in spend are in nominal terms unless otherwise stated.

Summary (2)

VFR visits recovered to 2019 levels, whilst holiday visits and business visits were still below 2019 levels but made positive recovery vs 2022

- **Holiday** visits made up the largest share of all inbound visits at 42% and reached 15.9m in 2023, up 31% vs 2022 (but still down 6% vs 2019). Spend totalled at a record £14.9bn, up 12% vs 2019 and up 29% vs 2022.
- **Visits to friends and relatives** set a record at 12.8m visits, up 3% vs 2019 and up 9% vs 2022. Spend also set a record at £8.1bn, up 27% vs 2019 and up 8% vs 2022.
- **Business** visits reached 6.5m visits, up 25% vs 2022 (although still 25% below 2019 levels). **Spend** recovered to £5.2bn lagging slightly behind at -10% vs 2019 (and up 5% vs 2022).

North America sets visits record, Europe remained just behind 2019 levels and Rest of World lagged behind but did see strong growth vs 2022

- **North America** saw the strongest recovery across global regions in 2023 with a record 6.1m visits, up 14% vs 2019 and up 12% vs 2022. Spend reached a record £7.2bn, nearly one and a half times the spend in 2019. However, spend was up by a smaller proportion of 5% vs 2022.
- There were 24.8m visits from **Europe** to the UK in 2023, down 9% vs 2019 (and up 18% vs 2022). Spend reached a record £13.4bn, up 8% vs 2019 and up 15% vs 2022.
- Visits from the **Rest of the World** totalled at 7.0m, down 14% vs 2019 but up 47% vs 2022. Spend contributed £10.4bn to total inbound spend in 2023, down 6% vs 2019 but up 32% vs 2022.

Market takeouts:

- The **USA, France and Germany** ranked top for both visits and spend in 2023, in line with 2019 patterns.
- Australia, Brazil, Canada, New Zealand, Saudi Arabia and the USA saw **record visits** in 2023.
- International travel saw a **significant return from North East Asian** markets in 2023; China, Hong Kong SAR of China* and South Korea.

International Passenger Survey by the ONS 2019-2023. Please note caveats to data on slide 29. All values and percentage changes in spend are in nominal terms unless otherwise stated. *SAR refers to Special Administrative Region.

2. Latest inbound UK and market statistics

Full year 2023

Volume and Value headlines 2023

Total	2019	2020	2021	2022	2023	% change vs 2019	% change vs 2022
Visits (000)	40,857	11,101	6,384	31,244	37,959	-7%	21%
Spend (£m)	£ 28,448	£ 6,210	£ 5,646	£ 26,497	£ 31,075	9%	17%
Nights (000)	289,628	-	93,522	262,864	292,870	1%	11%

- In 2023, the UK welcomed 38.0m inbound **visits**. Visits were below pre-pandemic levels (2019) by 7% but were up 21% vs 2022.
- Inbound visitors **spent** a record £31.1bn during 2023, up 9% vs 2019 and up 17% vs 2022. Taking inflation into account, visitor spend was down 10% vs 2019 and up 9% vs 2022.
- In total, 292.9m **nights** were spent in the UK, up 1% vs 2019 and up 11% vs 2022.

International Passenger Survey by the ONS 2019-2023. All values and percentage changes in spend are in nominal terms unless otherwise stated. Please note caveats to data on slide 29. Real term spend calculated using the CPI from the ONS.

Averages 2023

Total	2019	2021	2022	2023	% change vs 2019	% change vs 2022
Avg. Spend per Visit (£)	£ 696	£ 884	£ 848	£ 819	18%	-3%
Avg. Length of Stay	7.1	14.6	8.4	7.7	9%	-8%
Avg. Spend per Night (£)	£ 98	£ 60	£ 101	£ 106	8%	5%

- The **average spend per visit (SPV)** by inbound visitors was £819 per visit in 2023, up 18% vs 2019 but down 3% vs 2022. In real terms, SPV was down 3% vs 2019 and down 10% vs 2022. The overall year-on-year (YoY) trend shows a decrease in SPV since 2021.
- Average **spend per night (SPN)** has increased YoY since 2021 and reached £106 in 2023, up 8% vs 2019 (but down 11% in real terms vs 2019). SPN was up 5% vs 2022 (but down 2% in real terms vs 2022).
- Visitors **stayed an average** of 7.7 nights in 2023. Length of stay has been decreasing YoY since 2021 towards 2019 levels.

International Passenger Survey by the ONS 2019-2023. All values and percentage changes in spend are in nominal terms unless otherwise stated. Please note caveats to data on slide 29. Real term spend calculated using the CPI from the ONS.

Journey Purpose 2023: Visits (000)

Visits (000)	2019	2020	2021	2022	2023	% change vs 2019	% change vs 2022
Holiday	16,905	4,362	1,175	12,092	15,883	-6%	31%
VFR	12,427	3,447	3,456	11,781	12,848	3%	9%
Business	8,670	2,469	1,222	5,149	6,476	-25%	26%
Study	600	-	119	354	404	-33%	14%
Misc.	2,256	-	411	1,869	2,349	4%	26%

- **Holiday** visits made up the largest share of all inbound visits at 42% and reached 15.9m in 2023. This was down 6% vs 2019 and up 31% vs 2022.
- **Visits to friends and relatives** set a record at 12.8m visits, up 3% vs 2019 and up 9% vs 2022.
- **Business** visits reached 6.5m visits, one quarter below 2019 levels but up 26% vs 2022.
- **Study** visits totalled at 404,000 visits, down 33% vs 2019 but up 14% vs 2022.
- All other visits under '**miscellaneous'** contributed 2.3m visits in 2023, above both 2019 and 2022 levels.

International Passenger Survey by the ONS 2019-2023. Please note caveats to data on slide 29.

VISIT BRITAIN

Journey Purpose 2023: Spend (£m)

Spend (£m)	2019	2020	2021	2022	2023	% change vs 2019	% change vs 2022
Holiday	£ 13,341	-	£ 1,284	£ 11,567	£ 14,879	12%	29%
VFR	£ 6,408	-	£ 2,395	£ 7,558	£ 8,143	27%	8%
Business	£ 5,823	-	£ 939	£ 4,982	£ 5,241	-10%	5%
Study	£ 1,442	-	£ 529	£ 1,039	£ 1,158	-20%	11%
Misc.	£ 1,394	-	£ 492	£ 1,312	£ 1,586	14%	21%

- **Holiday** spend totalled at a record £14.9bn and accounted for 48% of inbound spend in 2023. Spend was up 12% vs 2019 and up 29% vs 2022.
- Spend from those **visiting friends and relatives** also set a record of £8.1bn, up 27% vs 2019 and up 8% vs 2022.
- **Business** recovered to £5.2bn spend, lagging slightly behind at -10% vs 2019 (and up 5% vs 2022).
- Spend from **study** visitors reached £1.2bn, down 20% vs 2019 (and up 11% vs 2022)
- All other spend under '**miscellaneous**' contributed £1.6bn in 2023, above both 2019 and 2022 levels.

International Passenger Survey by the ONS 2019-2023. All values and percentage changes in spend are in nominal terms unless otherwise stated. Please note caveats to data on slide 29.

Global Regions 2023: Visits (000)

Visits (000)	2019	2020	2021	2022	2023	% change vs 2019	% change vs 2022
Total Europe	27,293	7,988	4,834	20,979	24,826	-9%	18%
EU Total	24,828	-	4,410	18,959	22,499	-9%	19%
EU 15	20,328	-	3,516	15,621	18,472	-9%	18%
Other EU	4,500	-	895	3,338	4,026	-11%	21%
Rest of Europe	2,465	-	423	2,020	2,327	-6%	15%
North America	5,373	1,171	792	5,483	6,125	14%	12%
Rest of World	8,191	1,942	758	4,781	7,009	-14%	47%

- There were 24.8m visits from **Europe** to the UK in 2023, down 9% vs 2019 (and up 18% vs 2022). Visits from all European groupings remained below 2019 levels.
- **North America** saw the strongest recovery across global regions in 2023 with a record 6.1m visits, up 14% vs 2019 and up 12% vs 2022.
- Visits from the **Rest of the World** totalled at 7.0m, down 14% vs 2019 but up 47% vs 2022. However, there is much variation between markets in this region– please see next few slides.

International Passenger Survey by the ONS 2019-2023. Please note caveats to data on slide 29.

Global Regions 2023: Spend (£m)

Spend (£m)	2019	2020	2021	2022	2023	% change vs 2019	% change vs 2022
Total Europe	£ 12,407	-	£ 2,897	£ 11,678	£ 13,430	8%	15%
EU Total	£ 10,661	-	£ 2,464	£ 9,962	£ 11,504	8%	15%
EU 15	£ 8,733	-	£ 2,029	£ 8,573	£ 10,026	15%	17%
Other EU	£ 1,928	-	£ 435	£ 1,389	£ 1,478	-23%	6%
Rest of Europe	£ 1,746	-	£ 433	£ 1,717	£ 1,926	10%	12%
North America	£ 4,918	-	£ 932	£ 6,896	£ 7,227	47%	5%
Rest of World	£ 11,123	-	£ 1,816	£ 7,918	£ 10,417	-6%	32%

- Spend from **Europe** reached a record £13.4bn, up 8% vs 2019 and up 15% vs 2022. Other EU was the only European grouping which saw spend lagging behind pre-pandemic levels.
- **North America** spend reached a record £7.2bn, nearly one and a half times the spend in 2019. However, spend was up by a smaller proportion of 5% vs 2022.
- The **Rest of the World** contributed £10.4bn in 2023, down 6% vs 2019 but up 32% vs 2022.

International Passenger Survey by the ONS 2019-2023. All values and percentage changes in spend are in nominal terms unless otherwise stated. Please note caveats to data on slide 29.

Market Highlights 2023: Visits (000)

Visits (000)	2019	2022	2023	% change vs 2019	% change vs 2022
Australia	1,063	723	1,169	*10%*	*62%*
Austria	342	288	337	*-1%*	*17%*
Belgium	1,135	679	867	*-24%*	*28%*
Brazil	291	267	344	*18%*	*29%*
Canada	874	897	1,003	*15%*	*12%*
China	883	47**	368	*-58%*	*684%*
Denmark	691	566	629	*-9%*	*11%*
France	3,561	2,830	3,172	*-11%*	*12%*
Germany	3,233	2,233	2,957	*-9%*	*32%*
*GCC**	1,211	791	1,077	*-11%*	*36%*
Hong Kong, SAR of China	409	112	256	*-37%*	*128%*
India	692	516	604	*-13%*	*17%*
Irish Republic	2,851	2,509	2,889	*1%*	*15%*
Italy	2,197	1,313	1,696	*-23%*	*29%*
Japan	389	115	225	*-42%*	*96%*
Netherlands	1,987	1,632	1,960	*-1%*	*20%*
New Zealand	188	126	265	*41%*	*112%*
*Nordics**	2,128	1,743	1,903	*-11%*	*9%*
Norway	647	547	600	*-7%*	*10%*
Poland	1,651	1,345	1,628	*-1%*	*21%*
Romania	902	634	805	*-11%*	*27%*
Saudi Arabia	221	204	286	*29%*	*40%*
South Korea	301	89**	182	*-40%*	*104%*
Spain	2,319	2,012	2,210	*-5%*	*10%*
Sweden	789	630	674	*-15%*	*7%*
Switzerland	926	862	968	*5%*	*12%*
United Arab Emirates	553	380	477	*-14%*	*26%*
USA	4,499	4,587	5,122	*14%*	*12%*

- **Top inbound markets for visits in 2023**: the USA, France, Germany, the Irish Republic and Spain.
- **Markets that saw record visits:** Australia, Brazil, Canada, New Zealand, Saudi Arabia and the USA.
- **Markets that surpassed pre-pandemic (2019) levels:** Australia, Brazil, Canada, the Irish Republic, New Zealand, Saudi Arabia, Switzerland and the USA.
- **Many markets are marginally behind 2019 levels:** visits from Austria, Denmark, France, Germany, Netherlands, Nordics*, Norway, Poland, Romania and Spain are around 10% or less behind.
- **International travel returns from North East Asian markets:** A significant boost in visits was seen from China, Hong Kong (SAR of China) and South Korea in 2023 vs 2022 though still well behind 2019.

International Passenger Survey by the ONS 2019, 2022 and 2023. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates. Nordics* includes Denmark, Norway and Sweden. *SAR refers to Special Administrative Region. **Caution: low sample size. Please note caveats to data on slide 29.

VISIT BRITAIN

Market Highlights 2023: Spend (£m)

Spend (£m)	2019	2022	2023	% change vs 2019	% change vs 2022
Australia	£1,174	£1,118	£1,598	36%	43%
Austria	£172	£184	£244	42%	32%
Belgium	£359	£402	£481	34%	20%
Brazil	£250	£311	£425	70%	37%
Canada	£734	£934	£970	32%	4%
China	£1,710	£183**	£798	-53%	336%
Denmark	£329	£309	£362	10%	17%
France	£1,398	£1,575	£1,635	17%	4%
Germany	£1,567	£1,392	£1,829	17%	31%
*GCC**	£2,606	£2,041	£2,450	-6%	20%
Hong Kong, SAR of China	£560	£235	£382	-32%	62%
India	£753	£764	£804	7%	5%
Irish Republic	£958	£1,027	£1,236	29%	20%
Italy	£1,109	£798	£973	-12%	22%
Japan	£369	£164	£243	-34%	49%
Netherlands	£796	£894	£1,118	41%	25%
New Zealand	£171	£198	£347	103%	76%
*Nordics**	£1,166	£1,120	£1,219	5%	9%
Norway	£437	£418	£447	2%	7%
Poland	£498	£415	£472	-5%	14%
Romania	£439	£277	£295	-33%	6%
Saudi Arabia	£627	£713	£704	12%	-1%
South Korea	£285	£121**	£219	-23%	81%
Spain	£977	£1,055	£1,069	9%	1%
Sweden	£400	£393	£410	2%	5%
Switzerland	£570	£647	£755	33%	17%
United Arab Emirates	£869	£793	£914	5%	15%
USA	£4,184	£5,962	£6,258	50%	5%

- **Top inbound markets for spend in 2023**: the USA, Germany, France, Australia and the Irish Republic. The GCC* would rank second if counted as one market.
- **Markets that saw record spend:** Australia, Austria, Belgium, Brazil, Canada, France, Germany, India, the Irish Republic, Netherlands, New Zealand, the UAE and the USA.
- **Most markets surpassed pre-pandemic (2019) spend:** the majority of markets saw spend up on 2019 but leading recovery was New Zealand, Brazil and the USA.
- **In line with visits, international spend returns from North East Asian markets:** a boost in spend was seen from China, South Korea and Hong Kong (SAR of China) in 2023 vs 2022, though still well behind 2019.

International Passenger Survey by the ONS 2019, 2022 and 2023. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates. Nordics* includes Denmark, Norway and Sweden. *SAR refers to Special Administrative Region. **Caution: low sample size. Please note caveats to data on slide 29. Spend is in nominal terms unless otherwise stated.

VISIT BRITAIN

3. Latest inbound UK and market statistics

Q4 2023 (October to December)

Volume and Value headlines Q4 2023

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	Q4 2023	% change vs Q4 2019	% change vs Q4 2022
Visits (000)	7,686	-8%	105%	9,906	-4%	24%	10,928	-8%	10%	9,441	-8%	-2%
Spend (£m)	£ 5,621	17%	97%	£ 7,913	15%	16%	£ 10,113	10%	12%	£ 7,428	-2%	-4%
Nights (000)	55,215	9%	51%	72,968	5%	16%	99,845	-3%	9%	64,842	-3%	-10%

- Recovery of inbound **visits** to the UK slowed down in Q4 2023 to 9.4m. Visits were down 8% vs Q4 2019 (similar to previous quarters in 2023) and were also down 2% vs 2022.
- A similar pattern for **spend** was seen, which totalled at £7.4bn down 2% vs 2019 and down 4% vs 2022. Q4 was the only quarter in 2023 not recording an increase vs the same quarter in 2019 and 2022. In real terms, Q4 spend was down 19% vs Q4 2019 and down 8% vs Q4 2022.
- **Nights** reached 64.8m, down 3% vs Q4 2019 and down 10% vs Q4 2022.

International Passenger Survey by the ONS 2023. All values and percentage changes in spend are in nominal terms unless otherwise stated. Please note caveats to data on slide 29. Real term spend calculated using the CPI from the ONS.

VISIT BRITAIN

Averages Q4 2023

Averages	Q4 2019	Q4 2022	Q4 2023	% change vs Q4 2019	% change vs Q4 2022
Avg. Spend per Visit (£)	£ 734	£ 806	£ 787	7%	-2%
Avg. Length of Stay	6.5	7.5	6.9	6%	-8%
Avg. Spend per Night (£)	£ 113	£ 107	£ 115	2%	7%

- The **average spend per visit** by inbound visitors was £787 per visit in Q4 2023, up 7% vs 2019 (and down 12% vs 2019). SPV was down 2% vs 2022 (and down 6% in real terms).
- Average **spend per night** was £115 in Q4 2023 (up 2% vs 2019 but down 17% in real terms). SPN was up 7% vs Q4 2022 and up 2% in real terms).
- Visitors **stayed an average** of 6.9 nights in Q4 2023, longer than in Q4 2019 but shorter than in Q4 2022.

International Passenger Survey by the ONS 2023. All values and percentage changes in spend are in nominal terms unless otherwise stated. Please note caveats to data on slide 29. Real term spend calculated using the CPI from the ONS.

Journey Purpose Q4 2023: 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	Q4 2023	% change vs Q4 2019	% change vs Q4 2022
Holiday	2,769	-7%	193%	4,396	-2%	33%	4,961	-8%	15%	3,758	-8%	6%
VFR	2,852	7%	64%	3,120	4%	9%	3,597	5%	4%	3,279	-2%	-12%
Business	1,417	-33%	77%	1,696	-22%	32%	1,587	-26%	10%	1,775	-19%	10%
Study	74	-7%	78%	89	-42%	4%	151	-33%	22%	89	-37%	-13%
Misc.	573	16%	163%	605	16%	40%	631	-8%	5%	540	-3%	-13%

- **Holiday** visits reached 3.8m in Q4 2023, down 8% vs 2019. There was a slowdown in growth in Q4 vs 2019 although holiday visits were still up 6% vs Q4 2022.
- **Visits to friends and relatives** totalled at 3.3m visits in Q4, down 2% vs Q4 2019 and down 12% vs Q4 2022, also seeing a slowdown from earlier in the year.
- **Business** visits saw continued growth into Q4 2023 at 1.8m visits, down 19% vs Q4 2019 but showed improvements vs Q4 2022 (up 10%).
- **Study** visits in Q4 continued to lag further behind and were still down 37% vs Q4 2019. They also saw a 13% decline in visits vs Q4 2022.
- Remaining visits under '**miscellaneous**' reached 540,000 in Q4 2023, just behind pre-pandemic levels at -3% but also down 13% vs Q4 2022.

International Passenger Survey by the ONS 2023. Please note caveats to data on slide 29.

Journey Purpose Q4 2023: 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	Q4 2023	% change vs Q4 2019	% change vs Q4 2022
Holiday	£ 2,113	2%	144%	£ 4,117	26%	31%	£ 5,366	14%	21%	£ 3,283	0%	5%
VFR	£ 1,670	44%	53%	£ 1,911	22%	9%	£ 2,467	22%	-3%	£ 2,094	27%	-4%
Business	£ 1,127	-6%	97%	£ 1,263	-15%	-6%	£ 1,435	-5%	1%	£ 1,417	-13%	-14%
Study	£ 282	144%	68%	£ 227	-18%	-21%	£ 419	-21%	53%	£ 231	-56%	-26%
Misc.	£ 417	68%	168%	£ 379	33%	22%	£ 399	1%	6%	£ 392	-16%	-17%

- Spend from **holiday** visits saw a slowdown in growth in Q4 2023 and were on par with 2019 levels after continuous growth through the first three quarters of the year. They remained above Q4 2022 levels by 5%.
- **VFR** spend continued to surpass pre-pandemic levels in Q4 2023 but also saw a slowdown in recovery vs Q4 2022 (-4%). **Business** spend saw a decline in recovery in Q4 with spend down 13% vs Q4 2019 and down 14% vs Q4 2022.
- Spend from **study** visitors has fluctuated quite a lot in 2023 and saw a weak Q4 with spend down 56% vs 2019 and down 26% vs Q4 2022.
- All other spend under '**miscellaneous**' saw a dip in recovery in Q4. Spend was down 16% vs Q4 2019 and down 17% vs Q4 2022.

International Passenger Survey by the ONS 2023. All values and percentage changes in spend are in nominal terms unless otherwise stated. Please note caveats to data on slide 29.

Global Regions Q4 2023: 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	Q4 2023	% change vs Q4 2019	% change vs Q4 2022
Total Europe	5,467	-10%	94%	6,256	-9%	21%	6,596	-8%	8%	6,506	-10%	-6%
EU Total	4,968	-10%	93%	5,671	-10%	21%	5,995	-8%	10%	5,864	-10%	-6%
EU 15	3,956	-11%	92%	4,693	-10%	19%	4,980	-8%	10%	4,843	-9%	-4%
Other EU	1,012	-7%	100%	978	-10%	31%	1,015	-10%	9%	1,021	-15%	-12%
Rest of Europe	499	0%	99%	585	-4%	19%	601	-7%	-2%	642	-10%	-4%
North America	994	10%	139%	1,955	27%	23%	1,930	11%	-11%	1,247	5%	-6%
Rest of World	1,225	-12%	141%	1,694	-13%	44%	2,401	-19%	41%	1,688	-11%	22%

- Recovery of visits from **Europe** plateaued across 2023 when comparing to 2019 and were at -10% in Q4 2023. Looking at growth vs 2022, European visits showed a downwards trend in recovery with visits down to -6% in Q4.
- **North American** visits in Q4 2023 also eased off with visits 5% above 2019 levels but down 6% vs 2022.
- However, visits from the **Rest of World** continued to show growth in recovery in Q4 2023 with visits down 11% vs Q4 2019 and up 22% vs Q4 2022.

International Passenger Survey by the ONS 2023. Please note caveats to data on slide 29.

Global Regions Q4 2023: 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	Q4 2023	% change vs Q4 2019	% change vs Q4 2022
Total Europe	£ 2,647	19%	87%	£ 3,228	9%	16%	£ 4,087	10%	13%	£ 3,469	-1%	-11%
EU Total	£ 2,241	15%	80%	£ 2,751	7%	17%	£ 3,537	12%	15%	£ 2,975	0%	-10%
EU 15	£ 1,937	21%	78%	£ 2,445	17%	19%	£ 3,091	18%	16%	£ 2,553	5%	-8%
Other EU	£ 304	-11%	94%	£ 307	-36%	3%	£ 446	-19%	10%	£ 422	-25%	-20%
Rest of Europe	£ 406	40%	141%	£ 476	18%	13%	£ 550	1%	4%	£ 494	-3%	-17%
North America	£ 1,093	34%	144%	£ 2,288	57%	8%	£ 2,376	49%	-13%	£ 1,471	41%	-8%
Rest of World	£ 1,881	7%	90%	£ 2,398	-3%	22%	£ 3,650	-6%	34%	£ 2,489	-18%	11%

- Spend recovery from **Europe** slowed down in Q4 2023 with spend down 1% vs 2019 and down 11% vs 2022.
- **North America** spend was still up vs 2019 by 41% but was down 8% vs 2022.
- Spend from the **Rest of World** also showed a slowdown in recovery with spend down 18% vs 2019 and up 11% vs 2022.

International Passenger Survey by the ONS 2023. All values and percentage changes in spend are in nominal terms unless otherwise stated. Please note caveats to data on slide 29.

Market Highlights Q4 2023

Visits (000)	Q4 2023	% change vs. Q4 2019	% change vs Q4 2022
Australia	251	*7%*	*40%*
Austria	98	*7%*	*1%*
Belgium	206	*-29%*	*11%*
Brazil	83	*29%*	*22%*
Canada	219	*16%*	*9%*
China	104	*-39%*	*592%*
Denmark	161	*-20%*	*-27%*
France	850	*-8%*	*1%*
Germany	688	*-15%*	*2%*
*GCC**	300	*-1%*	*39%*
Hong Kong, SAR of China	55**	*-39%*	*19%*
India	144	*23%*	*2%*
Irish Republic	658	*-14%*	*-10%*
Italy	501	*-6%*	*6%*
Japan	50**	*-50%*	*16%*
Netherlands	518	*-2%*	*3%*
New Zealand	53**	*43%*	*47%*
*Nordics**	490	*-18%*	*-24%*
Norway	153	*-22%*	*-19%*
Poland	375	*-14%*	*-25%*
Romania	226	*0%*	*-1%*
Saudi Arabia	77**	*47%*	*21%*
South Korea	34**	*-53%*	*-7%*
Spain	648	*5%*	*-15%*
Sweden	175	*-14%*	*-25%*
Switzerland	269	*-4%*	*0%*
United Arab Emirates	142	*5%*	*21%*
USA	1,028	*3%*	*-8%*

Spend (£m)	Q4 2023	% change vs. Q4 2019	% change vs Q4 2022
Australia	£329	*16%*	*25%*
Austria**	£78	*83%*	*15%*
Belgium	£120	*13%*	*-9%*
Brazil	£99	*139%*	*20%*
Canada	£191	*46%*	*-15%*
China	£170	*-63%*	*200%*
Denmark	£86	*-15%*	*-27%*
France	£407	*-3%*	*-16%*
Germany	£432	*12%*	*10%*
*GCC**	£672	*-13%*	*16%*
Hong Kong, SAR of China	£106**	*-4%*	*12%*
India	£195	*66%*	*-19%*
Irish Republic	£288	*-12%*	*-5%*
Italy	£234	*-6%*	*-13%*
Japan	£46**	*-50%*	*-11%*
Netherlands	£260	*23%*	*-7%*
New Zealand	£58**	*47%*	*-25%*
Nordics	£308	*-14%*	*-20%*
Norway	£129	*-9%*	*0%*
Poland	£149	*-7%*	*-11%*
Romania	£80	*-25%*	*-24%*
Saudi Arabia	£195**	*15%*	*-16%*
South Korea	£28**	*-57%*	*-2%*
Spain	£329	*34%*	*-18%*
Sweden	£93	*-20%*	*-32%*
Switzerland	£186	*8%*	*4%*
United Arab Emirates	£297	*33%*	*11%*
USA	£1,280	*41%*	*-7%*

- **Top inbound markets in Q4 2023**:
  - **Visits:** USA, France, Germany, Irish Republic and Spain.
  - **Spend:** USA, Germany, France, Australia and Spain.
- **Strongest growth vs Q4 2019:**
  - **Visits:** Saudi Arabia**, New Zealand**, Brazil and India (all <20%).
  - **Spend:** Brazil, Austria**, India, New Zealand**, Canada, USA, Spain and the UAE (all >30%).
- **Records for Q4:**
  - **Visits:** Australia, Austria**, Canada, New Zealand**, Saudi Arabia** and the UAE.
  - **Spend:** Australia, Austria**, Germany, Switzerland and the UAE.

International Passenger Survey by the ONS 2019, 2022 and 2023. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates. Nordics* includes Denmark, Norway and Sweden. *SAR refers to Special Administrative Region. **Caution: low sample size. Please note caveats to data on slide 29. Spend is in nominal terms unless stated otherwise.

VISIT BRITAIN

4. Appendix

Sample size

Inbound market	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023
Australia	246	402	608	311	1,567
Austria	71	85	91	82	329
Belgium	168	175	192	164	699
Brazil	94	82	103	114	393
Canada	252	372	427	273	1,324
China	19	50	160	100	329
Denmark	170	156	157	154	637
France	738	697	661	717	2,813
Germany	540	817	787	584	2,728
*GCC**	261	251	362	302	1,176
Hong Kong	63	86	92	57	298
India	119	217	205	134	675
Irish Republic	1,097	848	835	644	3,424
Italy	341	306	360	369	1,376
Japan	46	54	80	50	230
Netherlands	453	509	523	441	1,926
New Zealand	44	85	112	60	301
Nordics	546	516	469	487	2,018
Norway	181	159	158	158	656
Poland	400	341	300	258	1,299
Romania	186	130	123	169	608
Saudi Arabia	62	46	75	99	282
South Korea	44	39	50	24	157
Spain	573	435	458	487	1,953
Sweden	195	201	154	175	725
Switzerland	224	238	211	214	887
United Arab Emirates	116	119	176	123	534
USA	1,222	2,148	2,104	1,342	6,816

Global Region	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023
Total Europe	6,131	5,853	5,642	5,365	22,991
→ EU Total	5,557	5,286	5,145	4,815	20,803
→ EU 15	4,602	4,488	4,421	4,085	17,596
→ Other EU	955	798	724	730	3,207
→ Rest of Europe	574	567	497	550	2,188
North America	1,474	2,520	2,531	1,615	8,140
Rest of World	1,588	2,020	2,704	1,737	8,049

Journey purpose	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023
Holiday	2,885	4,205	4,568	3,230	14,888
VFR	3,252	3,037	3,319	2,837	12,445
Business	1,599	1,576	1,336	1,476	5,987
Study	597	765	813	541	2,716
Miscellaneous (Excl. study)	77	75	149	76	377

Time period	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023
Overall sample	9,193	10,393	10,877	8,717	39,180

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.*

Please refer to the ONS website for information on confidence levels.

International Passenger Survey by the ONS 2023. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE). Nordics* includes Denmark, Norway and Sweden.

VISIT BRITAIN

Market Highlights 2023 – Spend in real terms (£m)

Spend (£m)	NOMINAL % change Q4 2023 vs Q4 2019	REAL % change Q4 2023 vs Q4 2019
Australia	16%	-5%
Austria	83%	50%
Belgium	13%	-7%
Brazil	139%	96%
Canada	46%	20%
China	-63%	-70%
Denmark	-15%	-30%
France	-3%	-20%
Germany	12%	-8%
*GCC**	-13%	83%
Hong Kong, SAR of China	-4%	-21%
India	66%	37%
Irish Republic	-12%	-27%
Italy	-6%	-23%
Japan	-50%	-59%
Netherlands	23%	1%
New Zealand	47%	20%
Nordics	-14%	-18%
Norway	-9%	-25%
Poland	-7%	-24%
Romania	-25%	-39%
Saudi Arabia	15%	-5%
South Korea	-57%	-65%
Spain	34%	10%
Sweden	-20%	-34%
Switzerland	8%	-11%
United Arab Emirates	33%	9%
USA	41%	16%

Spend (£m)	NOMINAL % change 2023 vs 2019	REAL % change 2023 vs 2019
Australia	36%	12%
Austria	42%	17%
Belgium	34%	11%
Brazil	70%	40%
Canada	32%	9%
China	-53%	-61%
Denmark	10%	-9%
France	17%	-3%
Germany	17%	-4%
*GCC**	-6%	-22%
Hong Kong, SAR of China	-32%	-44%
India	7%	-12%
Irish Republic	29%	7%
Italy	-12%	-28%
Japan	-34%	-46%
Netherlands	41%	16%
New Zealand	103%	68%
Nordics	-11%	-14%
Norway	2%	-16%
Poland	-5%	-22%
Romania	-33%	-44%
Saudi Arabia	12%	-7%
South Korea	-23%	-37%
Spain	9%	-10%
Sweden	2%	-15%
Switzerland	33%	9%
United Arab Emirates	5%	-13%
USA	50%	24%

The first table shows the % change in visitor spend in Q4 2023 vs Q4 2019, in nominal terms (without inflation) and real terms (taking inflation into account. The table to the right shows the same as the above but for 2023 vs 2019 overall. Real term change is calculated using the CPI from the ONS.

International Passenger Survey by the ONS 2023. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE).
Nordics* includes Denmark, Norway and Sweden. Real term spend calculated using the CPI from the ONS.

VISIT BRITAIN

4. Survey Background

Impact of COVID-19 on IPS data from 2020-2022

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.

- **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.

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
- **Misc/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

Quarterly Inbound Update & Full Year 2023

Q4 2023 and Full Year 2023

International Passenger Survey by the ONS

(Published 17th May 2024)

VISIT BRITAIN