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RESEARCH, DOCUMENT

# International inbound visits and spend to Wales

The International Passenger Survey (IPS) collects information about passengers entering and leaving the UK, and has been running continuously since 1961.

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# Introduction

The Office for National Statistics (ONS) have released the latest provisional International Passenger Survey (IPS) results covering 2023 data. This report now includes full year 2023 data with comparisons to previous years. Trend data has also been updated to account for revised figures in previous years. All data can be found at **Travel trends: 2023 (ONS)** (<https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/2023>).

The IPS collects information about passengers entering and leaving the UK and has been running continuously since 1961. Anonymous face-to-face interviews are undertaken with a random sample of passengers as they leave the UK, for 2023 Wales this was 981 interviews. Sample was drawn from all major ports of entry in the UK, for Wales this includes Cardiff airport, Holyhead, Pembroke and Fishguard.

## About the data

The data presented in this publication is derived from the IPS conducted by the ONS. **Please refer to the ONS website for more on IPS methodology** (<https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/2022>).

## Notes

### Note on spend figures

The ONS do not adjust spend figures to account for inflation therefore caution

should be taken when comparing spend for 2023 against 2019 or earlier as the high inflation rates between then and now mean many nominal gains in spend figures actually represent real term drops in spending.

## Note on methodological changes

The ONS have made improvements to the estimates for the UK's nations and regions from 2023. This was also applied on previous data from 2019-2022. These improvements have led to small changes (<4%) across visits, spend and nights when comparing the old and revised datasets at the UK nations and regions level across 2019-2022.

## Summary of findings for Wales

Wales received 892,000 visits in 2023, down 13% on 2019 but up 30% on 2022, whilst spend reached £458m in 2023, down 11% on 2019, but up 16% on 2022. Wales remains the only UK nation to not recover spend figures from 2019.

Wales has received the lowest visitor and spend figures across the UK except for the North East of England since 2019, except for spend figures in 2019 when the East Midlands region reported slightly lower figures putting Wales into third lowest.

## Summary tables

**Table 1: Visits to the UK by region, across 2019, 2022, and 2023**

Visits (000)	2019	2022	2023	% change vs 2019	% change vs 2022
London	21,714	16,126	20,277	-7%	26%
Rest Of England	16,930	13,181	15,231	-10%	16%
Scotland	3,457	3,242	3,987	15%	23%
Wales	1,027	687	892	-13%	30%
Total UK	40,857	31,244	37,959	-7%	21%

**Table 2: Spend to the UK by region, across 2019, 2022, and 2023**

Spend (£m)	2019	2022	2023	% change vs 2019	% change vs 2022
London	£15,700	£14,149	£16,697	6%	18%
Rest Of England	£9,051	£8,444	£9,893	9%	17%
Scotland	£2,547	£3,192	£3,593	41%	13%

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Spend (£m)	2019	2022	2023	% change vs 2019	% change vs 2022
Wales	£515	£394	£458	-11%	16%
Total UK	£28,448	£26,497	£31,075	9%	17%

## Purpose of visit

Analysis of purpose of visit for 2022 and 2023 shows an increase in visits across all categories (“Other” showing the largest at 111%, followed by holidays at a 53% increase). There was a decline in spending within the business (-5%) and study (-36%) categories. London and Scotland both show decline in Study spending (-2% and -19% respectively, but the Rest of England shows an increase of 30%), Business spending is up across all regions other than Wales as well (London with 1%, Rest of England with 9%, and Scotland with 19%). It is also worth noting that these figures do not account for the increase in inflation which reduces the growth in spending even further.

Visiting friends and relatives and Holidays remain the two most popular reasons for visiting, curiously both study and business categories have shown an increase in visits but a decline in spending.

**Table 3: Purpose of visit to the UK by region for 2022 and 2023**

Purpose	Total visits, 2022 (000)	Total spend, 2022 (£m)	Total visits, 2023 (000)	% Change from 2023	Total spend, 2023 (£m)	% Change from 2022
Holiday	227	146	347	53%	179	23%
Business	96	66	120	25%	63	-5%
VFR	339	145	375	11%	181	25%
Study	8	25	11	38%	16	-36%
Other [ <a href="https://www.gov.wales#note-1">Note 1</a> ] ( <a href="https://www.gov.wales#note-1">https://www.gov.wales#note-1</a> )]	19	11	40	111%	20	82%

(<https://www.gov.walesnull>)[Note 1] For the purposes of the IPS Visits classed as “other” include those attending sporting events, for shopping, health, religious or other purposes, together with visits for more than one purpose when none predominates (for example, visits both on business and on holiday). Overseas visitors staying overnight in the UK on their way to other destinations are also included in “other”.

## Country of origin

The top 5 countries of origin for Visitors remains similar in 2023 to 2022 though notably visitors from Germany have overtaken those from France. The USA

continues to be the country recording the highest total spend, but in terms of number of visitors the Irish Republic remains on top.

**Table 4: Top 5 countries for Visit and Spend to Wales for 2023**

Country	Total visits (000)	Total spend (£m)
Irish Republic	142	47
USA	109	68
Germany	102	43
France	67	25
Australia	54	37

**Table 5: Top 5 countries for Visit and Spend to Wales for 2022**

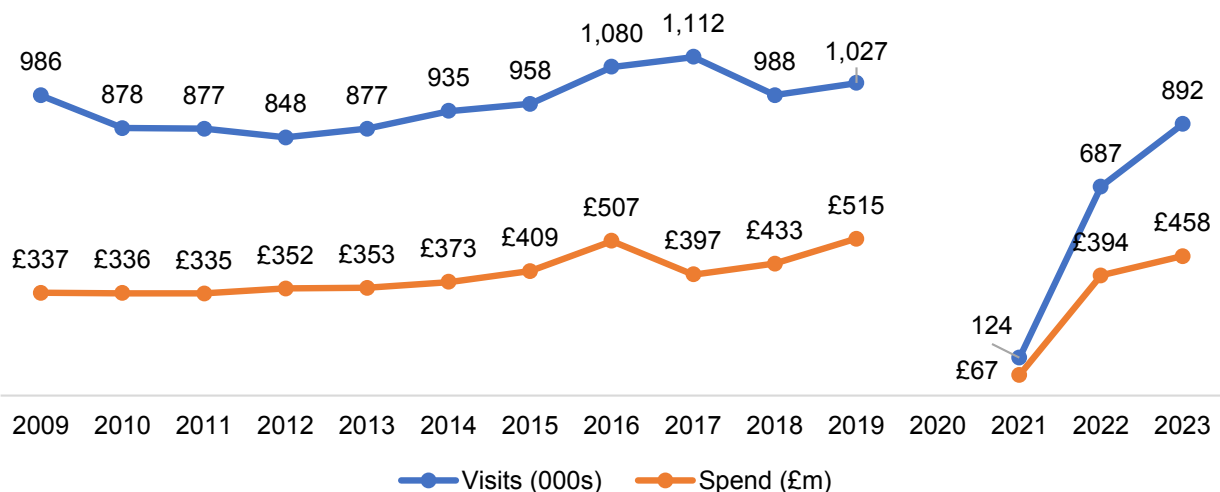
Country	Total Visits (000)	Total Spend (£m)
Irish Republic	91	29
USA	81	56
France	56	24



Country	Total Visits (000)	Total Spend (£m)
Germany	49	22
Australia	29	33

## Historical trend

**Figure 1: Visits and spend to Wales, 2009 to 2023**



Description of Figure 2: This graph shows Visits (in Thousands) spend (in £millions) for 2009 to 2023. The graph shows how spend and visits had slightly increased since 2009 on a broadly upward trend, however post-COVID recovery has not reached post-2009 levels of visitors. Spend has recovered well though this graph does not account for inflation Calculations for real term spend comparisons do not currently exist.

# Quarter 1 and Quarter 2 2024

The ONS has now released Q1 and Q2 of the International Passenger Survey for 2024. Visit Britain has produced a full summary of the data which can be found at [Inbound visits and spend: quarterly, regional | VisitBritain.org](https://www.visitbritain.org/research-insights/inbound-visits-and-spend-quarterly-regional) (<https://www.visitbritain.org/research-insights/inbound-visits-and-spend-quarterly-regional>).

## Wales

- Inbound visits to Wales reached 445,000 visits from Jan-Jun 2024, up 10% vs 2023 but still 4% below 2019 levels.
- Inbound spend to Wales reached £203m, up 8% vs 2019 and up 7% vs 2023.

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