



Llywodraeth Cymru
Welsh Government

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

Anonymous face-to-face interviews are undertaken with a random sample of passengers as they leave the UK, in 2022 this led to 44,395 departure interviews being used for the IPS. The IPS reports on visits and spend over time. Please note that spend comparisons between years are not adjusted for inflation.

In 2022 the sample for Wales was 831. 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 International Passenger Survey (IPS) conducted by the Office for National Statistics (ONS). [Please refer to the ONS website for more on IPS methodology.](#)

Summary of 2022 data

- There was a total of 686,000 inbound visits to Wales (33% down on 2019) and £391 million in spend (24% lower than in 2019). This represents the largest drop among UK regions compared with 2019, with visitor numbers now lagging significantly behind other regions.
- In contrast to this, there were 3.2 million visits to Scotland (down 7% on 2019) and a record spend of £3.2bil (up 24% on 2019).
- For London there were 16.1 million visits in 2022 (down 26% on 2019) and an overall spend of £14.1bil (10% down on 2019).
- For the Rest of England there were 13.2 million visits in 2022, 22% down on

the 2019 number, and overall spend was also down (6% below 2019) at £8.5bil.

Totals

IPS data revealed that in 2022 there were 686,000 visits to Wales from overseas visitors, compared to 1,023,000 visits over the same period in 2019.

Despite no restrictions on international travel last year, overall visits to Wales were 33% lower than pre-pandemic. Spend was also lower (-24%); Visitors to Wales spent £391 million in 2022, down from £515 million in 2019.

Table 1a: Visits and spend from international visitors to Wales in quarters 1 and 2 of 2022

Totals	Quarter 1	Change since 2019 [%]	Quarter 2	Change since 2019 [%]
Visits	73,000	-53%	184,000	-39%
Spend [£m]	45	-17%	101	-23%

Table 1b: Visits and spend from international visitors to Wales in quarters 3 and 4 of 2022

Totals	Quarter 3	Change since 2019 [%]	Quarter 4	Change since 2019 [%]
Visits	259,000	-31%	171,000	-8%

Totals	Quarter 3	Change since 2019 [%]	Quarter 4	Change since 2019 [%]
Spend [£m]	150	-25%	95	-26%

calcSource: International Passenger Survey 2022

Seasonality

Table 2a: Total visits and spend for international visitors to Wales in quarters 1 and 2 of 2022

Totals	Quarter 1	Change since 2019 [%]	Quarter 2	Change since 2019 [%]
Visits	73,000	-53%	184,000	-40%
Spend [£m]	45	-17%	101	-23%

Table 2b: Total visits and spend for international visitors to Wales in quarters 3 and 4 of 2022

Totals	Quarter 3	Change since 2019 [%]	Quarter 4	Change since 2019 [%]
Visits	259,000	-32%	171,000	-8%
Spend [£m]	150	-25%	95	-26%

Source: International Passenger Survey 2022

For seasonality, there is a clear trend with both spend and visits peaking in Q3 (July to September), with 259,000 visits (-32% on 2019) and £150mil spend (-25% on 2019). Q1 shows the lowest figures, as well as the most significant drop in visitor numbers from 2019 (-53%).

Purpose of visit

Visiting friends and relatives (VFR) and holidays remain the most popular reasons for visiting Wales in 2022. There has been a large drop in these numbers since 2019, most notably in holiday visits (-43%) but across the board as well. Spend, other than study, is significantly down on 2019 figures as well.

Table 3: Total visits and spend for international visitors to Wales in 2022 by reason for visiting

Reason for visiting	Total visits	Change since 2019 [%]	Total spend [£m]	Change since 2019 [%]
Holiday	227,000	-43%	146	-18%
Business	95,000	-39%	64	-12%
VFR	338,000	-21%	145	-26%
Study	8,000	-39%	25	-56%
Other		-38%	11	-16%

Reason for visiting	Total visits	Change since 2019 [%]	Total spend [£m]	Change since 2019 [%]
	19,000			

Source: International Passenger Survey 2022

Market

Breaking this down by country of origin shows Europe overall remains the most popular market, with North America closely following. Remaining visits are spread across other countries around the world. These other countries also represent the most significant negative change since 2019. The same holds true for spend as well, with the overall largest decline from “Other Countries”. The highest spending market, is also Europe. North America has slightly increased spend on 2019, representing the only increase since 2019.

Table 4: Total visits and spend for international visitors to Wales in 2022 by largest markets

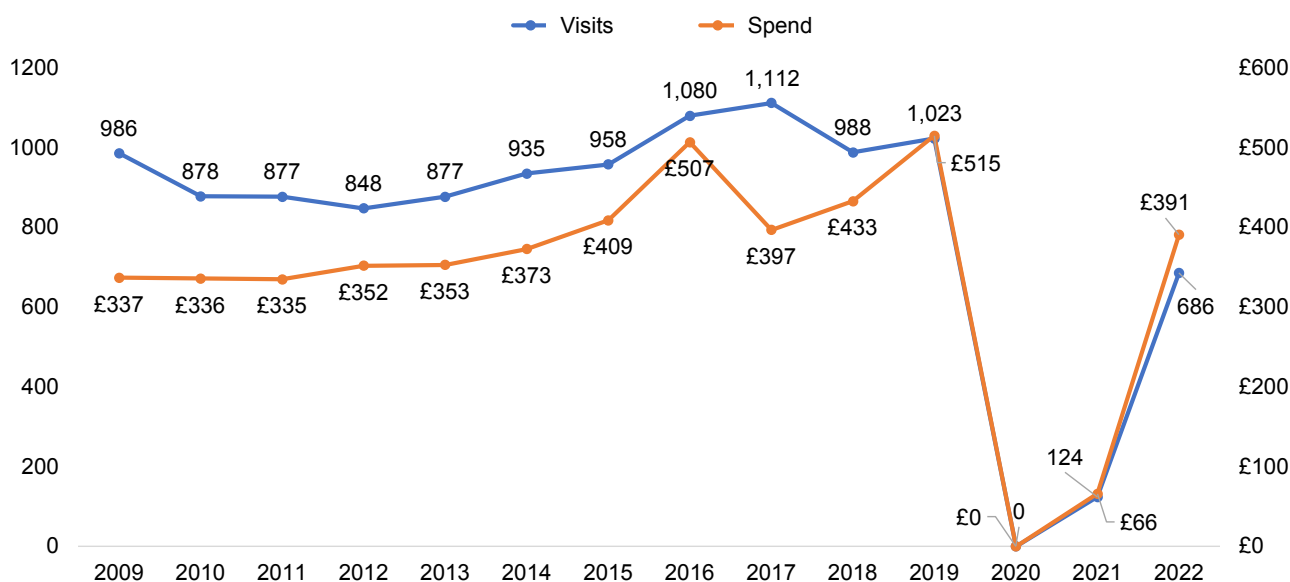
Market	Total visits	Change since 2019 [%]	Total spend [£m]	Change since 2019 [%]
North America	111,000	-24%	70	+3%
Europe	460,000	-29%	181	-13%
of which EU	424,000	-30%	162	-17%

Market	Total visits	Change since 2019 [%]	Total spend [£m]	Change since 2019 [%]
of which EU 15	352,000	-30%	139	-17%
of which EU other	72,000	-30%	23	-18%
Other countries	115,000	-51%	141	-41%
Total world	686,000	-33%	391	-24%

Source: International Passenger Survey 2022

Historical trend

Figure 1: Visits and spend to Wales from 2009 to 2022



Description of Figure 1: This graph shows Visits (in Thousands) on the left axis and spend (in £millions) on the right axis from 2009 to 2022. 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.

Source: International Passenger Survey 2022

2023 data

Quarter 1, 2, and 3 data for 2023 has been published by the ONS. Please note that these data are marked provisional and subject to revision by the ONS before the full annual data are published. Any changes made by the ONS will be noted in future publications and the data will be updated to reflect these changes.

Summary of 2023 year to date (January to September 2023)

- There have been 750,000 inbound visits to Wales up to September 2023 (10% down on the same point in 2019) and £390 million in (non-adjusted for inflation) spend (up 1% year to date 2019).
- There were 3.17 million visits to Scotland up to September 2023 (up 21% on 2019) and a spend of £2.94bil (up 50% on 2019).
- For London there were 14.9 million visits in 2023 up to September (down 7% on 2019) and an overall spend of £12.3bil (up 9% on 2019).
- For the Rest of England there have been 11.6 million visits in 2023 up until September (down 10% on 2019) and a spend of £7.6bil (13% up on 2019).

Table 5: Total visits and spend from international visitors to Wales in quarters 1, 2 and 3 of 2023

Totals	Qtr 1	Change since Qtr 1 2019 [%]	Qtr 2	Change since Qtr 2 2019 [%]	Qtr 3	Change since Qtr 3 2019 (Jan to Jun) [%]	Jan to Sept 2023	Change since 2019 (Jan to Sept) [%]
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Visits	151,000	-4%	252,000	-17%	348,000	-8%	750,000	-10%
Spend [£m]	67	23%	121	-8%	201	0%	390	1%

Source: International Passenger Survey 2023

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