



Llywodraeth Cymru
Welsh Government

RESEARCH

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 £515m in 2019.

Table 1a: Visits and spend from international visitors to Wales in 2022 (Quarter 1 and Quarter 2)

All passengers	Quarter 1	% Change since 2019	Quarter 2	% Change since 2019
Total visits	73	-53%	184	-39%
Total spend	£45	-17%	£101	-23%

Table 1b: Visits and spend from international visitors to Wales in 2022 (Quarter 3 and Quarter 4)

All passengers	Quarter 3	% Change since 2019	Quarter 4	% Change since 2019
Total visits	259	-31%	171	-8%
Total spend	£150	-25%	£95	-26%

Seasonality

Table 2a: Visits and spend for international visitors to Wales in 2022 broken down by quarter (Quarter 1 and Quarter 2)

	Quarter 1		Quarter 2	
	2022	% Change from 2019	2022	% Change from 2019
Visits (000s)	73	-53%	184	-40%
Spend (£Mil)	£45	-17%	£101	-23%

Table 2b: Visits and spend for international visitors to Wales in 2022 broken down by quarter (Quarter 3 and Quarter 4)

	Quarter 3		Quarter 4	
	2022	% Change from 2019	2022	% Change from 2019
Visits (000s)	259	-32%	171	-8%
Spend (£Mil)	£150	-25%	£95	-26%

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: Visits and spend for international visitors to Wales in 2022 broken down by reason for visit

	Total visits		Total spend (£m)	
	2022	% Change from 2019	2022	% Change from 2019
Holiday	227	-43%	£146	-18%
Business	95	-39%	£64	-12%
VFR	338	-21%	£145	-26%
Study	8	-39%	£25	-56%
Other	19	-38%	£11	-16%

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: Visits and spend from international visitors to Wales for 2022 broken down by largest markets

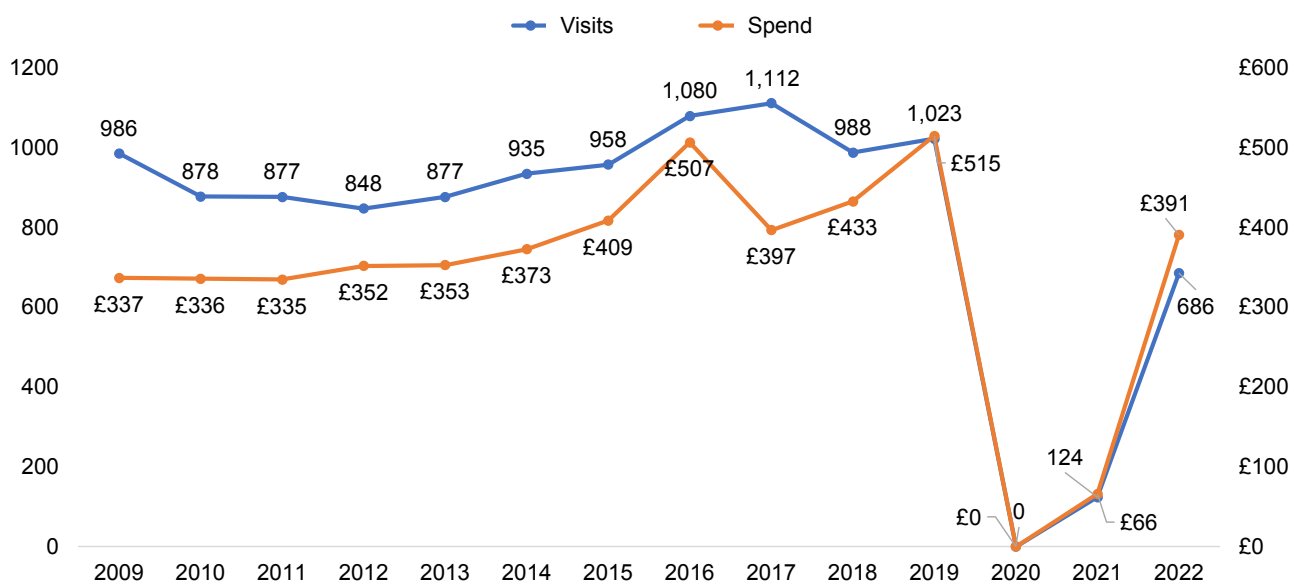
	Total visits (000s)		Total spend (£m)	
	2022	% Change from 2019	2022	% Change from 2019
North America	111	-24%	70	3%
Europe	460	-29%	181	-13%
<i>- of which EU</i>	424	-30%	162	-17%
<i>- of which EU15</i>	352	-30%	139	-17%
<i>- of which EU other</i>	72	-30%	23	-18%
Other countries	115	-51%	141	-41%

	Total visits (000s)		Total spend (£m)	
Total world	686	-33%	391	-24%

Source: International Passenger Survey 2022

Historical trend

Figure 1: A graph to show 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

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