Inbound and Domestic Tourism Prospects

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Scattered Clouds

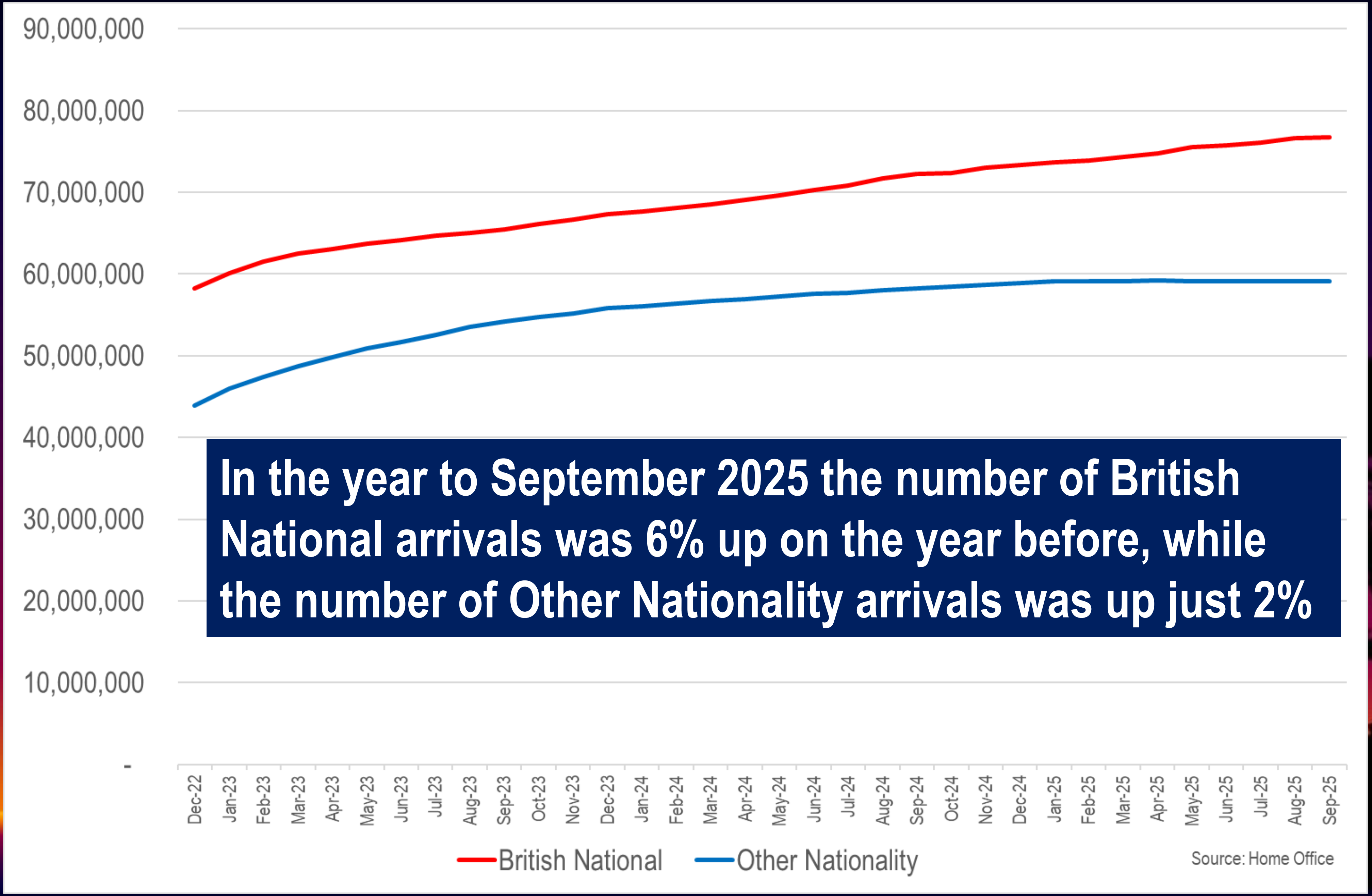
January 2026

Coming up…

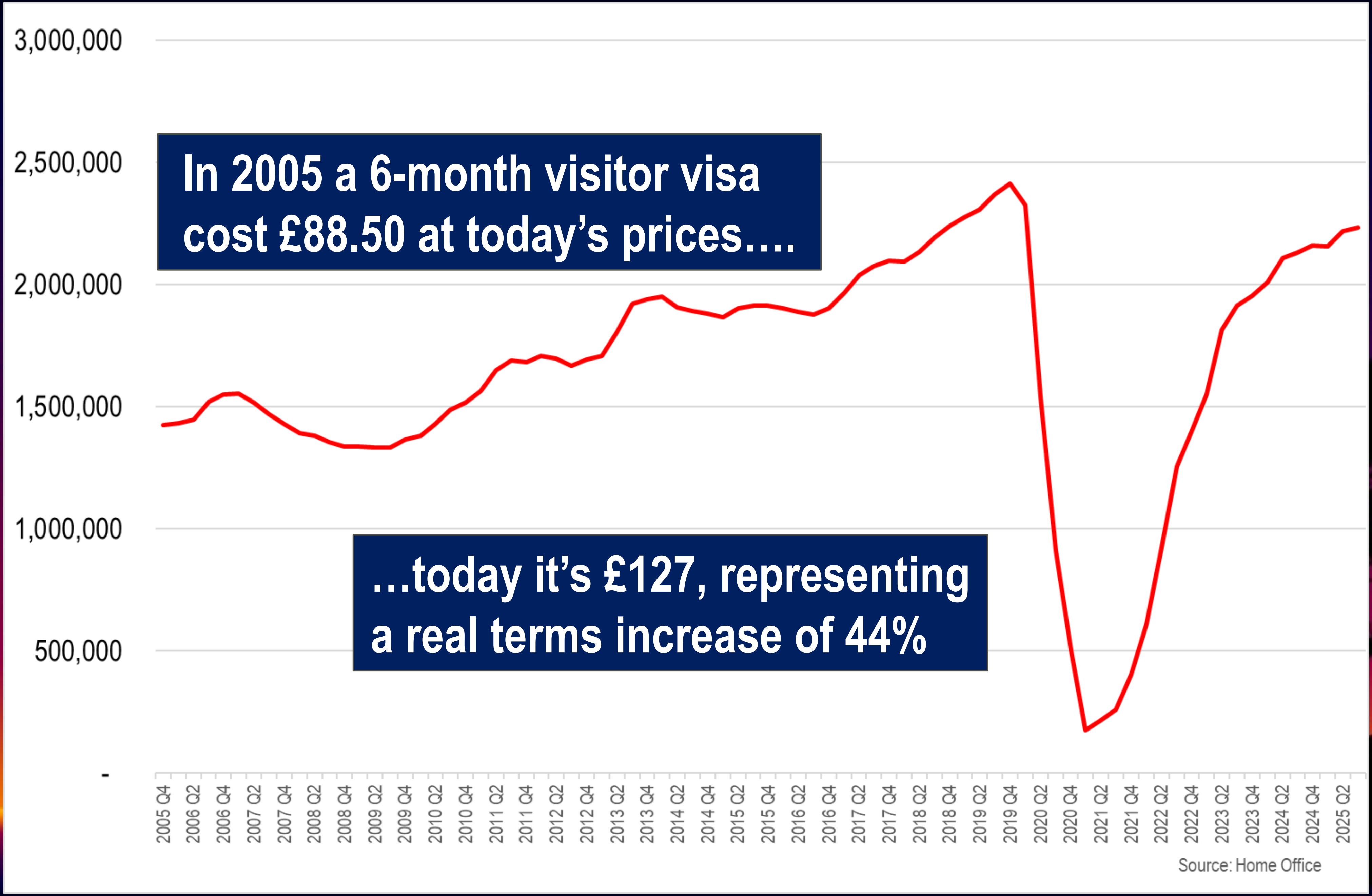
- Past volume and value trends
- The 3 (intertwined) M's underpinning prospects…
- Motivation to travel
- Money to spend
- Means of transport
- Outlook

Past volume and value trends

Arrivals at the UK border (rolling 12-month total)

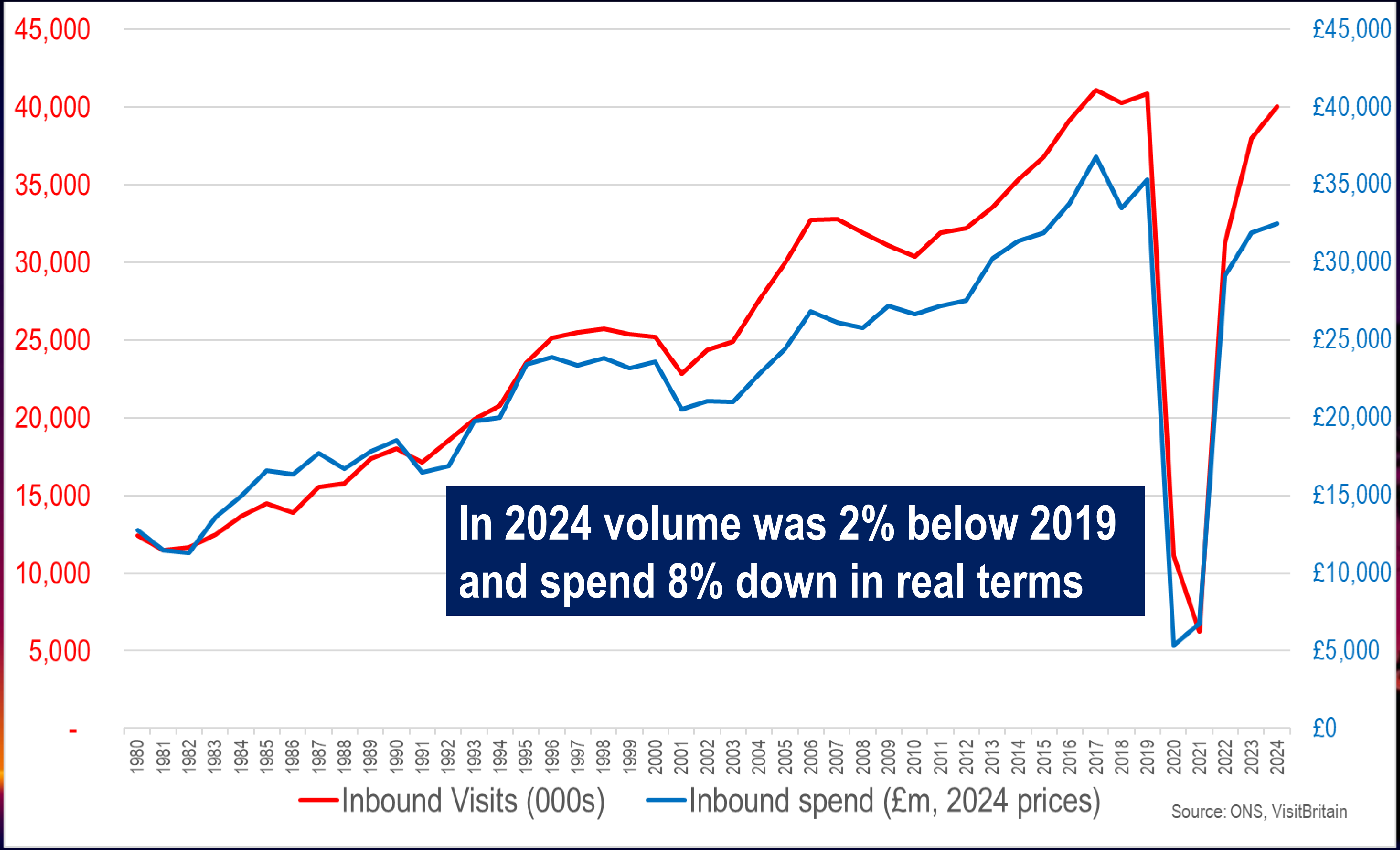


Trends in the number of Visitor visas issued (rolling 12-month tally)

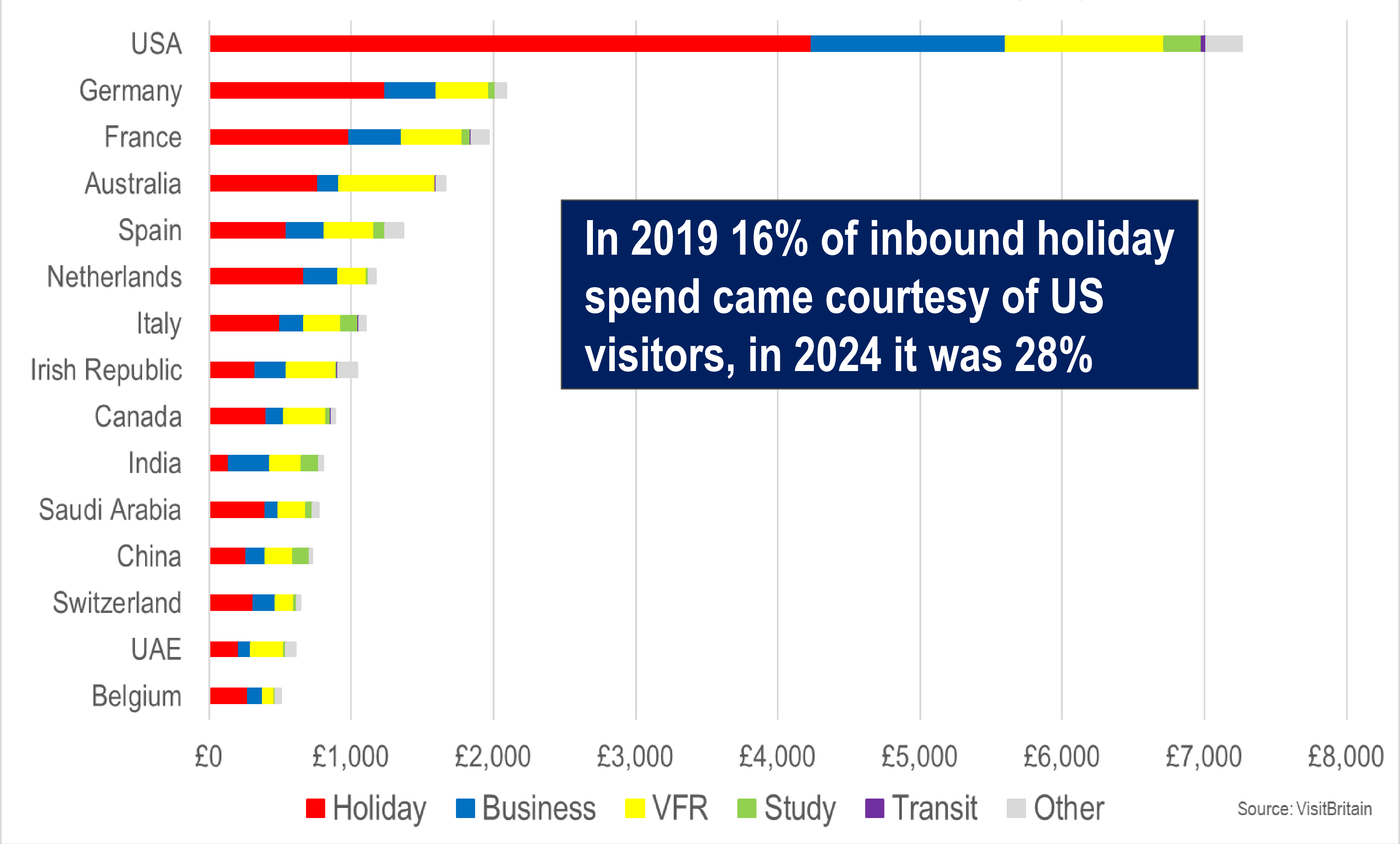


Latest 12 months vs 2019 -8%

Inbound volume and value trends 1980-2024

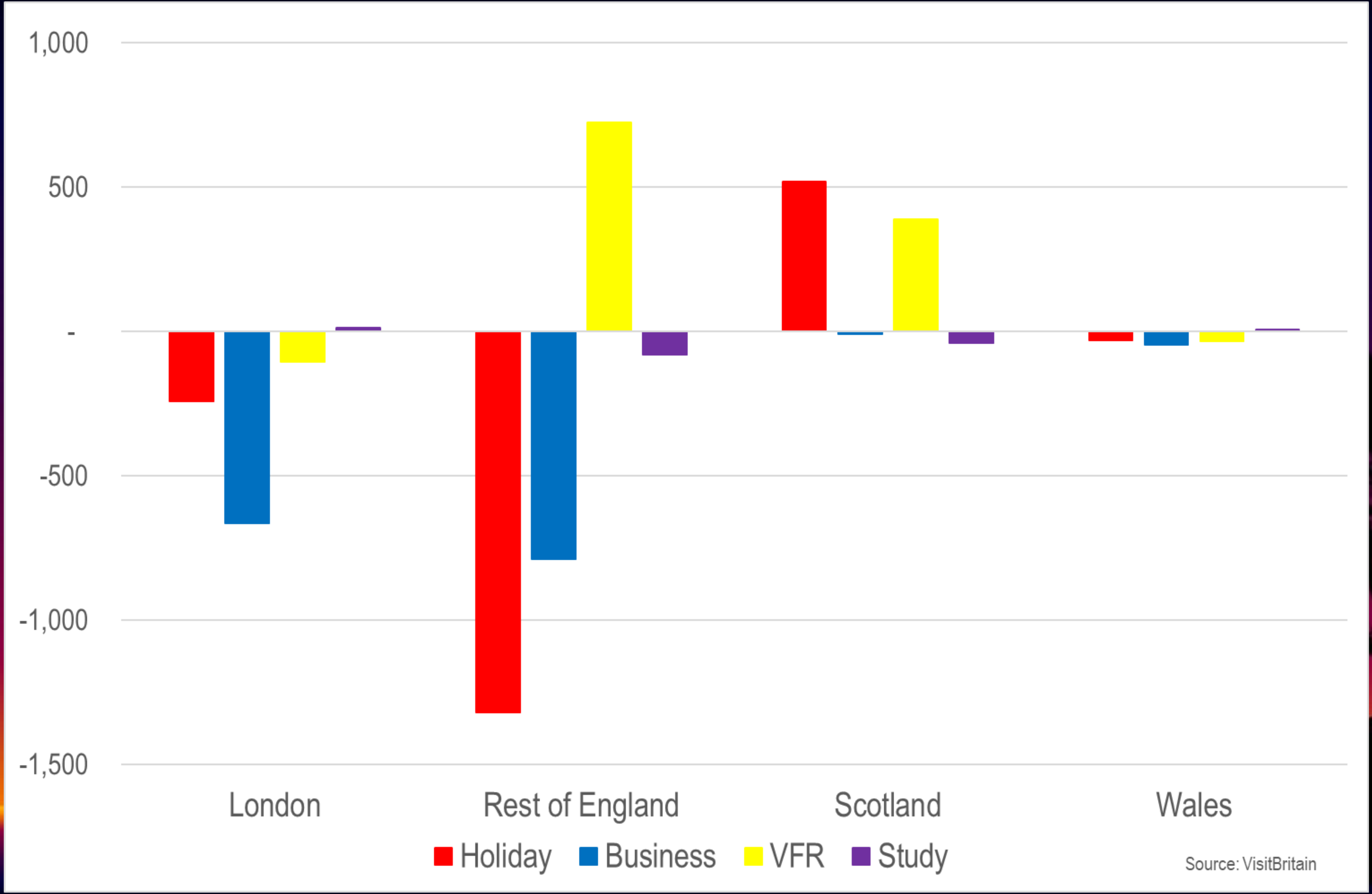


Top inbound markets in 2024 by visitor spend and trip purpose (£m)

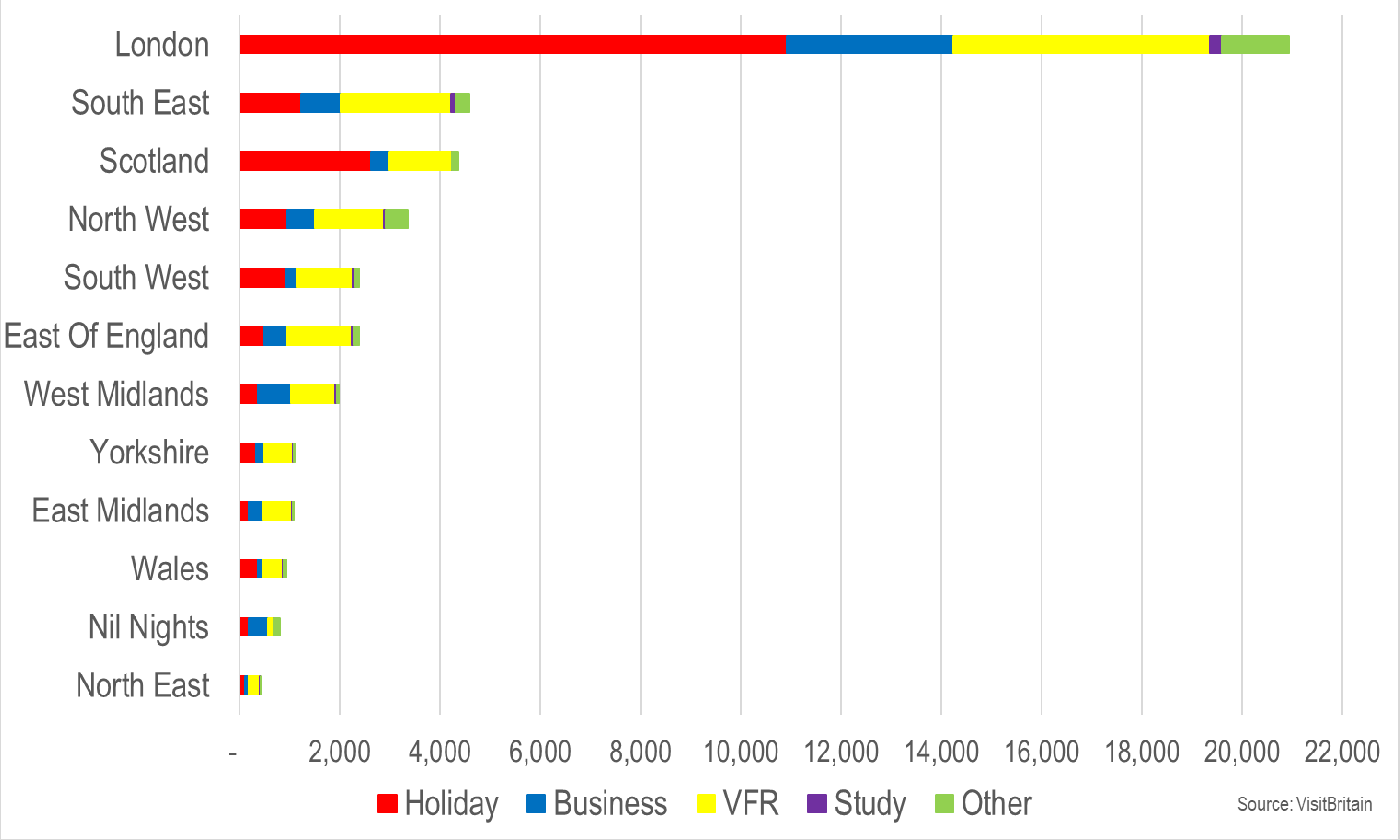


In 2019 16% of inbound holiday spend came courtesy of US visitors, in 2024 it was 28%

Change in inbound visits 2019-24 (000s)



Purpose mix of inbound visits (000s) by area in 2024



Top 20 towns for overnight inbound visits

(2024 data. Source: ONS)

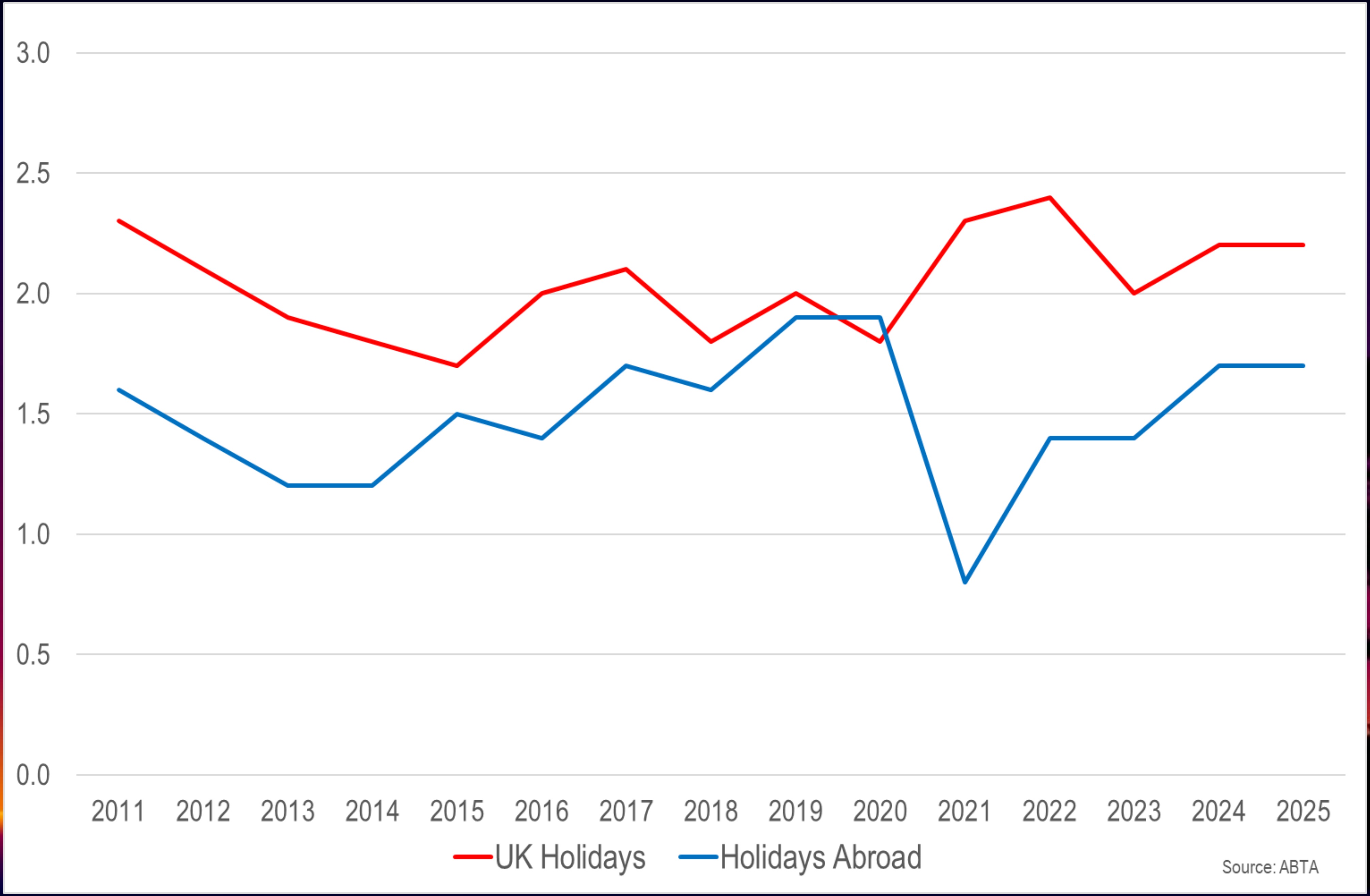
All visitors (000s)		Holiday visitors (000s)	
London	20,949	London	10,918
Edinburgh	2,559	Edinburgh	1,769
Manchester	1,521	Manchester	462
Birmingham	927	Liverpool	347
Liverpool	918	Glasgow	307
Glasgow	736	Inverness	258
Oxford	547	**Bath**	**206**
Cambridge	479	Oxford	197
Bristol	**450**	Brighton	174
Brighton	414	York	167
Bath	**353**	Cardiff	147
Leeds	327	**Bristol**	**141**
Cardiff	325	Birmingham	138
Inverness	314	Cambridge	131
Crawley	282	Canterbury	121
York	273	Leeds	82
Canterbury	244	Stirling	81
Nottingham	236	Stratford-upon-Avon	77
Luton	219	Southampton	63
Chester	201	Chester	62

Top 20 towns for inbound visitor day trips

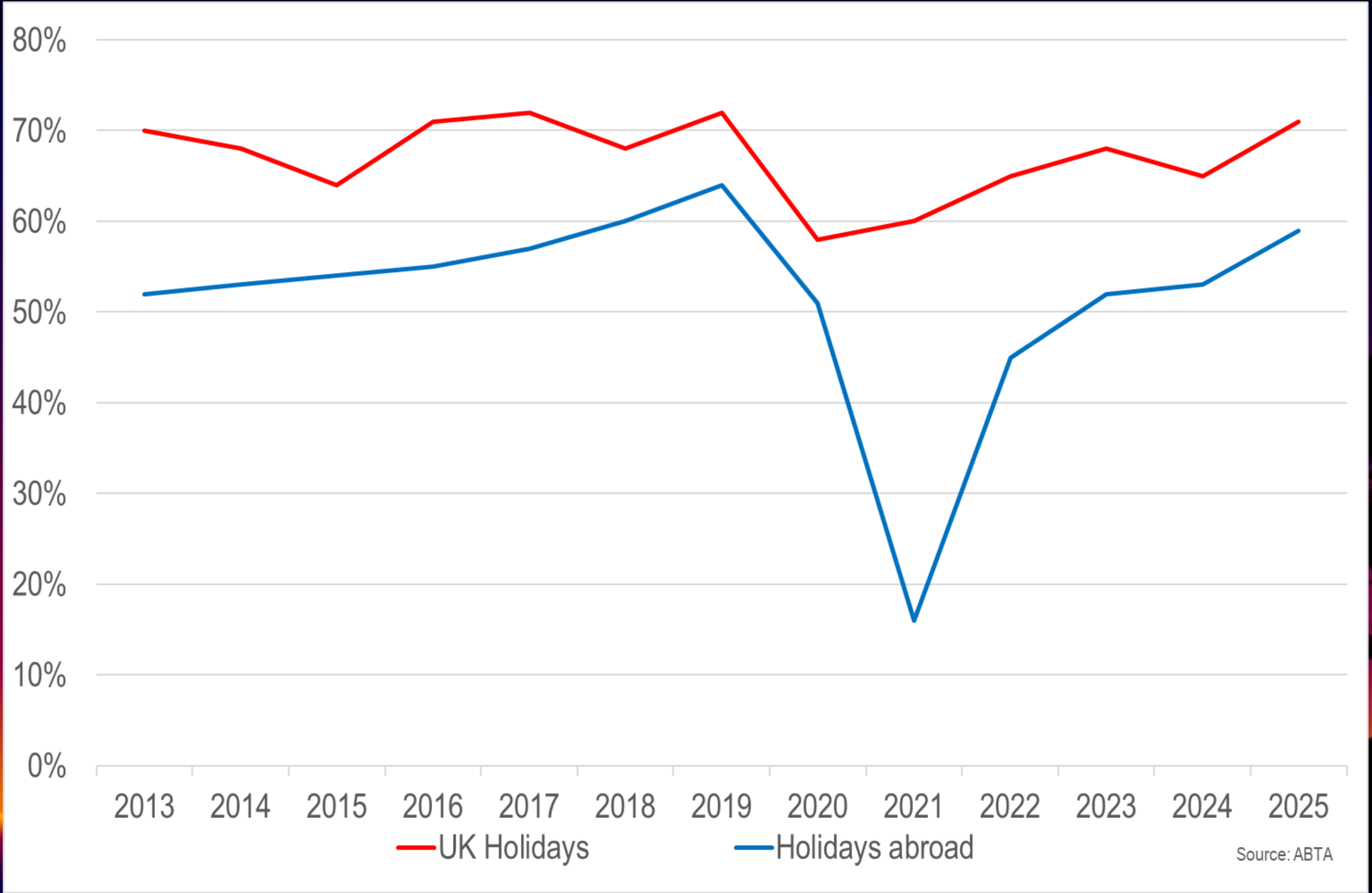
(2016 data. Source: VisitBritain)

All visitors (000s)		Holiday visitors (000s)	
London	1,183	London	452
Windsor	484	Windsor	360
Brighton/Hove	438	Oxford	285
Oxford	423	**Bath**	**253**
Bath	**419**	Brighton/Hove	221
Cambridge	267	Cambridge	160
Edinburgh	202	Canterbury	146
Canterbury	201	Salisbury	140
Salisbury	201	Watford	105
Birmingham	153	Edinburgh	95
Liverpool	148	Glasgow	92
Glasgow	146	St Andrews	69
Watford	145	Liverpool	69
Manchester	144	Stratford-upon-Avon	68
York	129	Stirling	68
Stratford-upon-Avon	125	**Bristol**	**58**
Bristol	**120**	Amesbury	57
St Andrews	110	Hastings	56
Cardiff	108	York	54
Portsmouth / Southsea	95	Cardiff	53

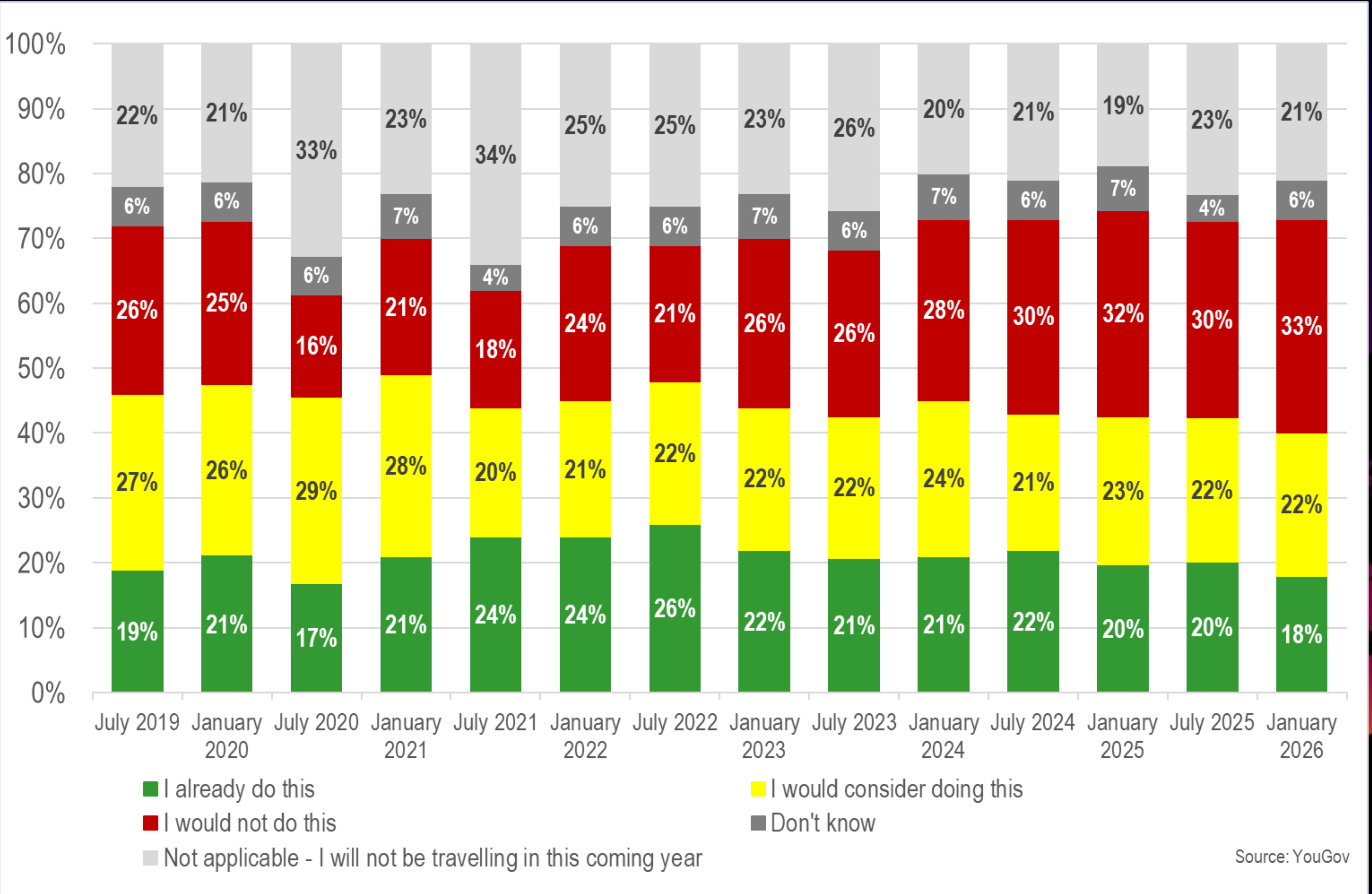
Trends in the average number of holidays per annum that Brits take (year ending August)



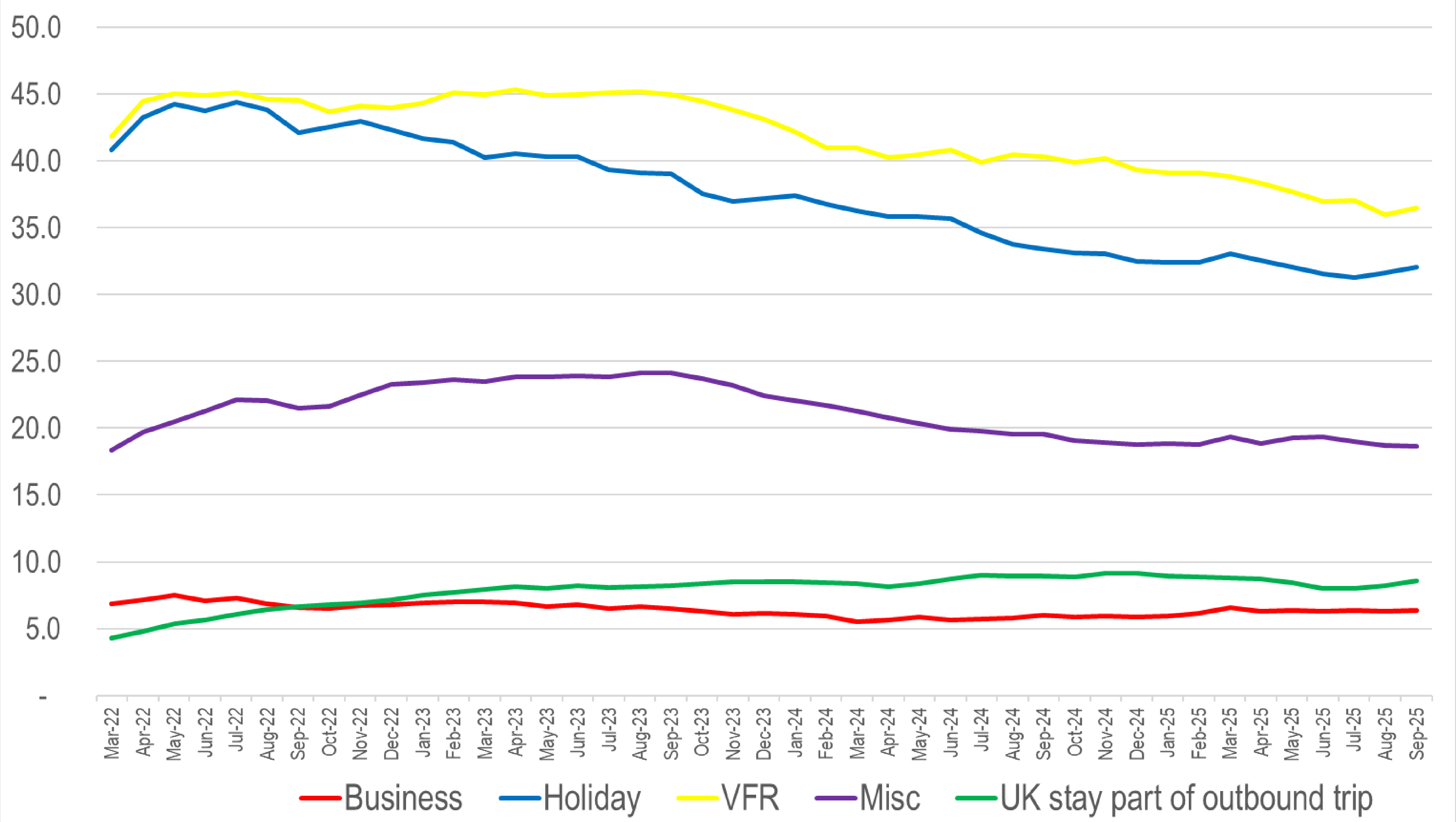
Proportion of Brits taking a holiday (year ending August)



Willingness of Brits to swap a foreign holiday for a UK holiday to avoid flying

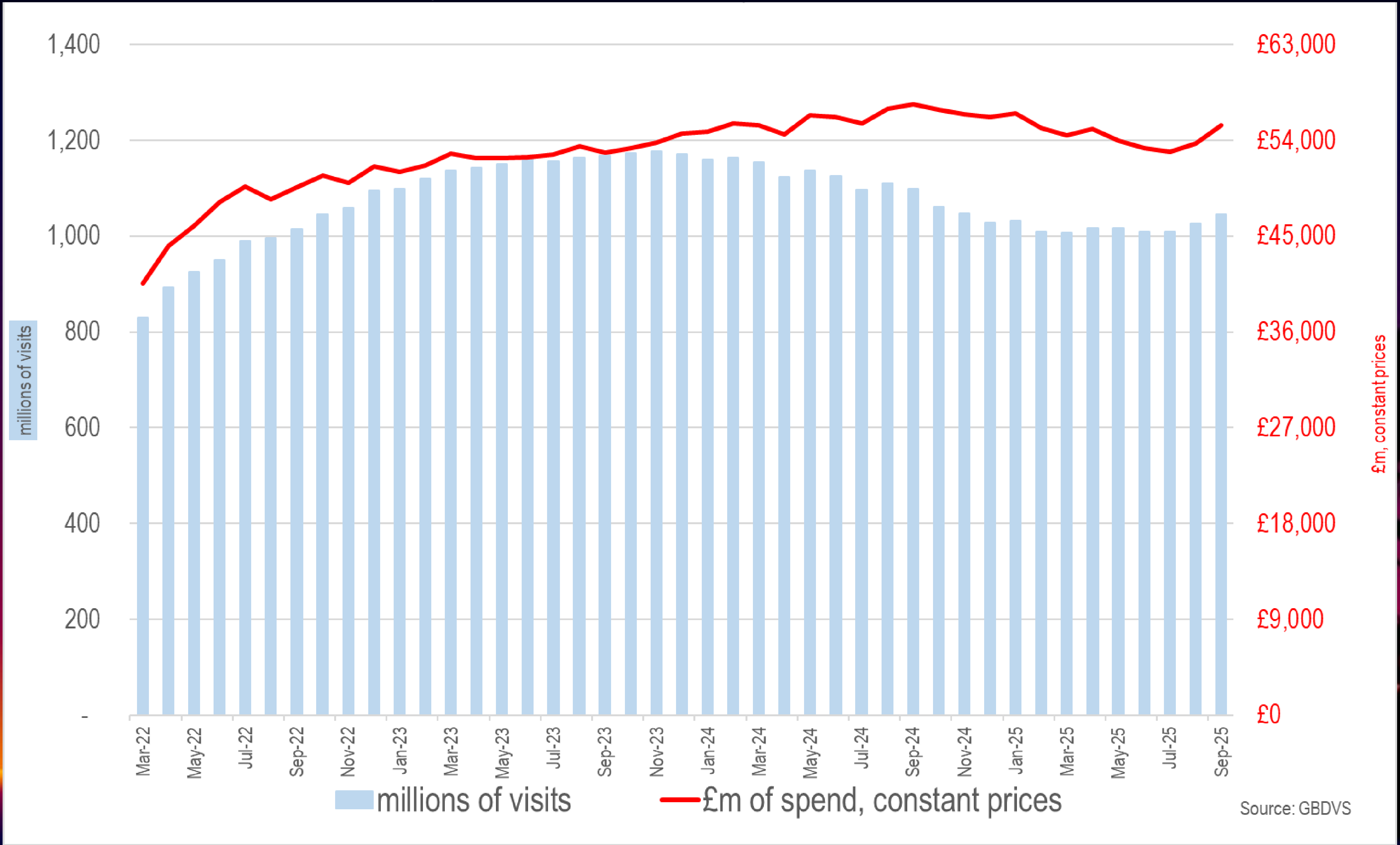


Domestic overnight trips by journey purpose (millions, rolling 12-months)



Source: GBTS

Domestic Tourism Day Visits in Great Britain (rolling 12-month volume and value)



Motivation to travel

The most important drivers of destination choice for potential inbound visitors

Offers good value for money	66%
Is a welcoming place to visit	64%
Is good for relaxing, resting, recharging	61%
There is beautiful coast and countryside to explore	61%
I can roam around visiting many types of places	60%
It's easy to get around once there	60%
There is a good variety of food and drink to try	57%
It's easy to get to	55%
Is a place where I can explore history and heritage	54%
Offers lots of different experiences in one destination	54%
It has experiences I can't have anywhere else	53%
There are vibrant towns and cities to explore	53%
Is good for seeing famous sites, places, ticking off the 'must do' list	52%

Is inclusive and accessible for visitors like me	51%
Is good to visit at any time of year	50%
It has surprising and unexpected experiences	48%
Is a mixture of old and new	47%
Has an interesting mix of cultures from around the world	46%
There are interesting local people to meet	45%
It offers the opportunity to travel sustainably/responsibly	44%
Has a thriving arts and contemporary culture scene	41%
A good place for treating myself, eg premium brands, gourmet food, etc.	40%
A place recommended by friends or family	40%
If I don't visit soon, I'd miss out	35%
Offers experiences I want to share on social media	34%

Source: VisitBritain

Findings based on research undertaken by VisitBritain, with percentages being the proportion who scored each aspect as 5, 6 or 7 on a 7-point scale from “not at all important” to “extremely important”

How Britain is ranked out of fifty nations in the Anholt Nations Brand Index

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	**2025**
OVERALL Nations Brand Index	4	4	3	3	3	3	3	3	3	3	4	2	5	6	4	5	6
Tourism	5	5	4	4	4	3	4	5	3	4	4	4	6	6	6	6	8
Is rich in historic buildings and monuments	4	4	4	5	5	5	5	5	5	5	5	5	5	5	5	5	4
Has a vibrant city life and urban attractions	4	4	4	4	4	4	4	4	4	4	4	4	6	5	5	5	6
Would like to visit if money was no object	8	8	6	6	6	5	6	5	6	5	6	5	7	7	7	10	11
Is rich in natural beauty	24	22	22	22	20	20	18	24	24	24	26	23	31	31	27	23	24
Culture	4	6	4	4	4	5	5	5	5	4	5	3	4	3	4	5	4
Interesting & exciting contemporary culture	4	4	4	3	3	3	3	4	3	4	3	4	4	4	4	4	3
Excels at sport	8	8	5	6	5	4	4	5	4	5	5	3	4	5	5	5	8
Has a rich cultural heritage	7	7	7	7	7	7	6	7	7	7	7	6	8	8	6	6	7
People	6	6	4	4	4	4	5	7	6	6	7	4	10	8	10	10	9
If visited, people would make me feel very welcome	13	13	12	13	10	13	11	12	13	15	16	11	18	16	19	18	20

Source: VisitBritain

Words / phrases Brits believe best describe an “ideal destination”

	All	Under 35	35-54	55+
Relaxing	1	1	1	1
Value for money	2	2	2	2
Rich in culture and heritage	3	5	6	3
Beautiful	4	4	3	9
Fun	5	3	4	15
Plenty to do	6	6	5	8
Uncrowded	7	11	7	4
Friendly	8	6	9	6
Easy to get to	9	15	11	5
Accommodation choices suitable for all budgets	10	8	12	11
Local produce and cuisine often found on menus	11	16	10	7
Welcoming	12	14	14	10
Breath-taking	13	11	13	13
Suitable for all ages	14	9	8	20
Authentic	15	13	15	12
Romantic	16	10	17	21
For all seasons	17	17	20	14
Distinct culture	18	19	16	18
Out of the ordinary	19	18	19	19
Traditional	20	21	18	17
Upmarket	21	20	21	16

An “ideal” destination should offer emotional benefits, tick the right functional boxes, and have varied product features

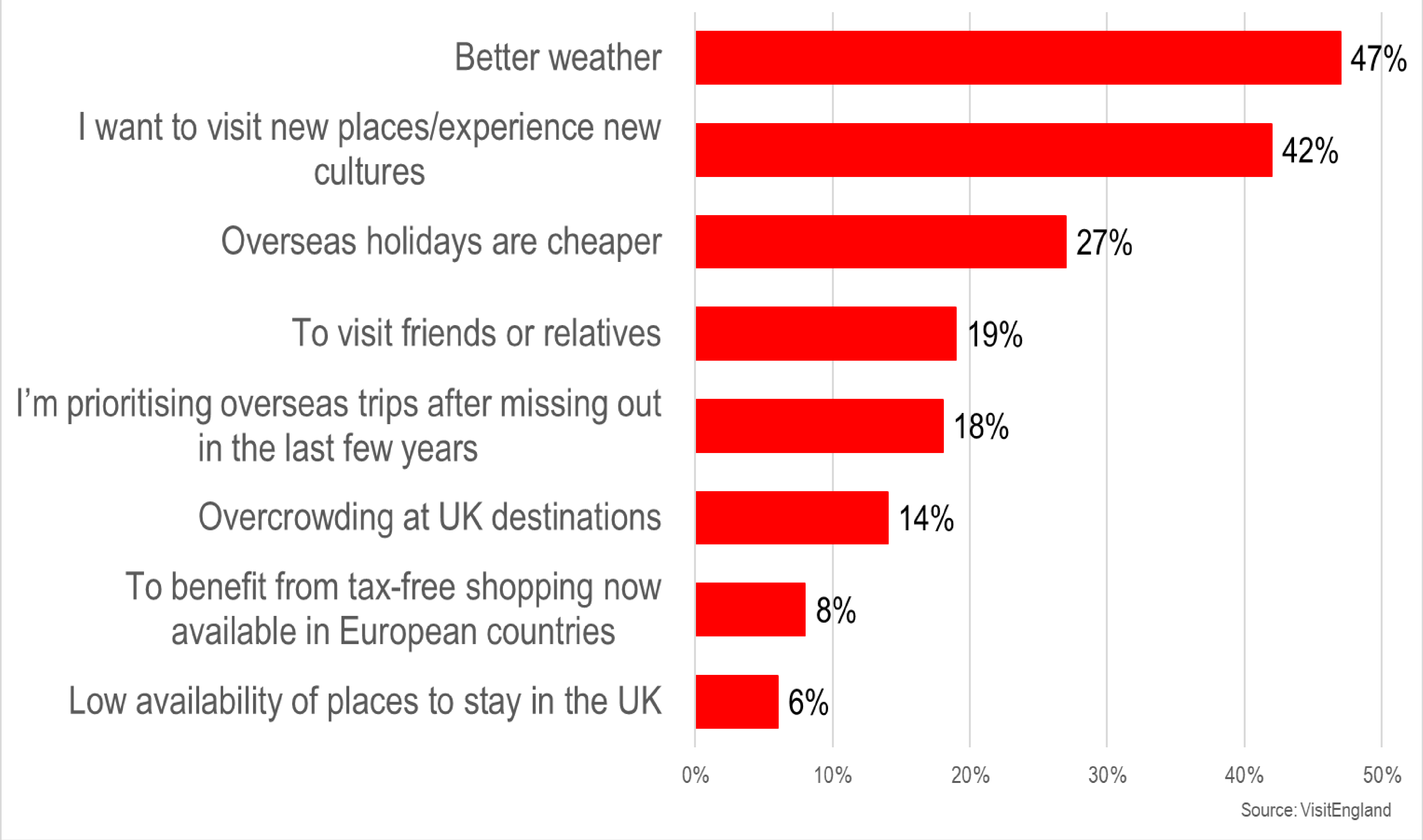
Findings based on research undertaken by VisitAberdeenshire in late 2025 in which GB residents open to taking a domestic holiday were asked to pick three words from a pre-defined list

Why Brits from different generations say holidays are important

	Gen Z 1997-2006	Millennials 1981-96	Gen X 1965-80	Baby boomers 1946-64	Silent generation 1928-45
To relax	64%	70%	77%	76%	77%
To spend quality time with family and/or friends	65%	69%	62%	57%	54%
For my mental health and wellbeing	54%	56%	51%	43%	26%
To escape the pressures of day-to-day life	50%	53%	52%	33%	30%
For cultural experiences	38%	37%	39%	41%	48%
To enjoy better weather	35%	38%	39%	38%	33%
For adventure and exploration	42%	40%	28%	23%	24%
To meet new people	20%	15%	9%	18%	18%
To pursue a personal interest or hobby	14%	14%	12%	12%	14%
For educational experiences	17%	17%	9%	6%	3%

Source: ABTA

Reasons Brits say they are more likely to choose an overseas rather than UK trip



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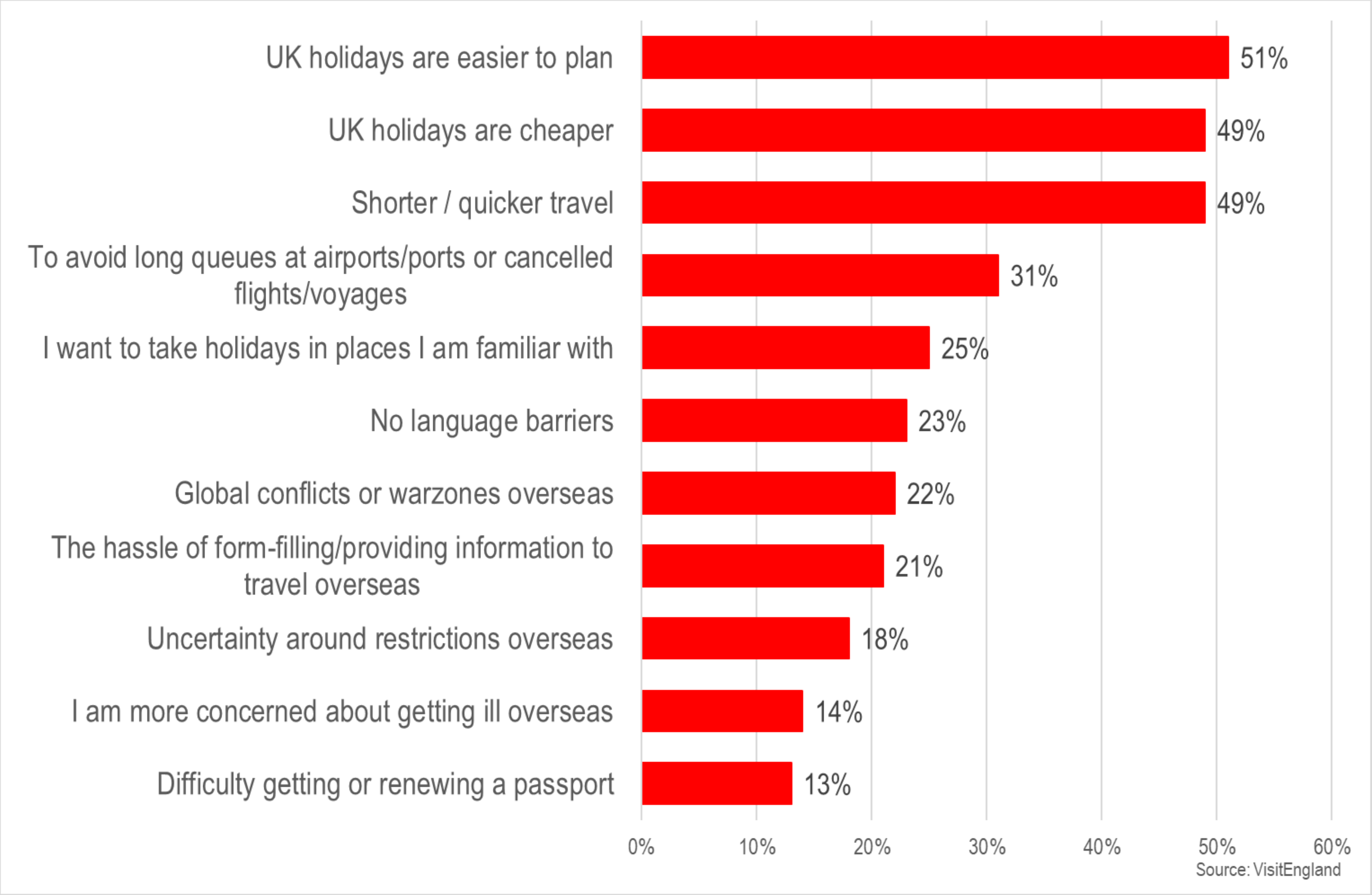


Money to spend

Price indices relevant to tourism in 2025, where 2015=100

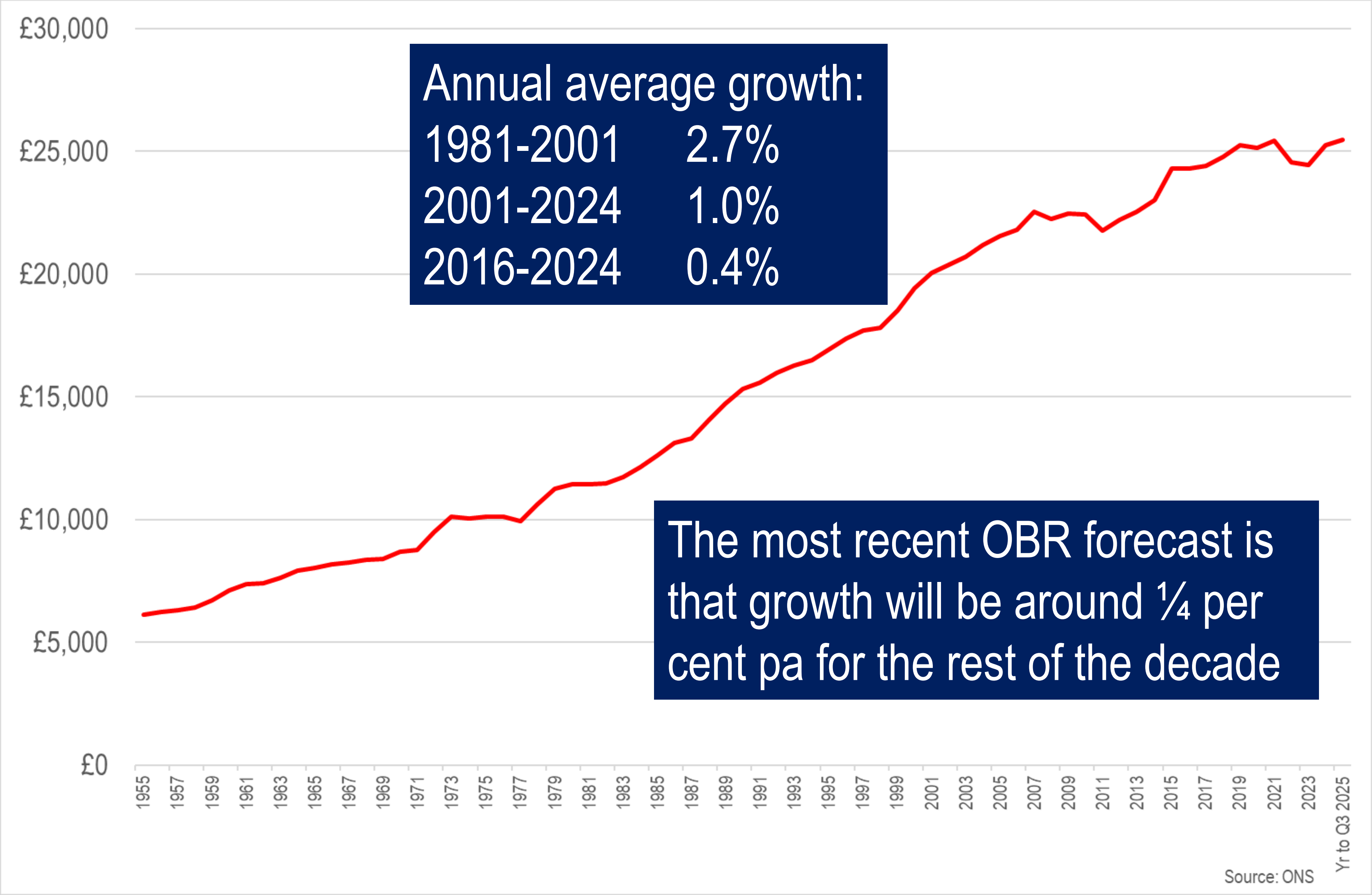
Holiday centres, camping sites, youth hostels and similar	194
Passenger transport by air	168
Travel insurance	167
Passenger transport by sea and inland waterway	164
Museums, libraries, zoological gardens	158
Package holidays	157
Hotels, motels and similar accomodation services	154
Restaurants and cafes	150
Toll facilities and parking meters	149
Passengar transport by taxi and hired car with driver	146
Recreational and sporting services: Attendance	143
Passenger transport by railway	143
Cinemas, theatres, concerts	139
Consumer Price Index	**138**
Petrol	122
Travel goods	93

Source; ONS

Cost pressures confronting visitor economy businesses underpin higher prices faced by tourists:

Employment costs
Energy costs
Other input costs, eg foodstuffs
Business rates

Trends in UK real disposable income per head since 1956

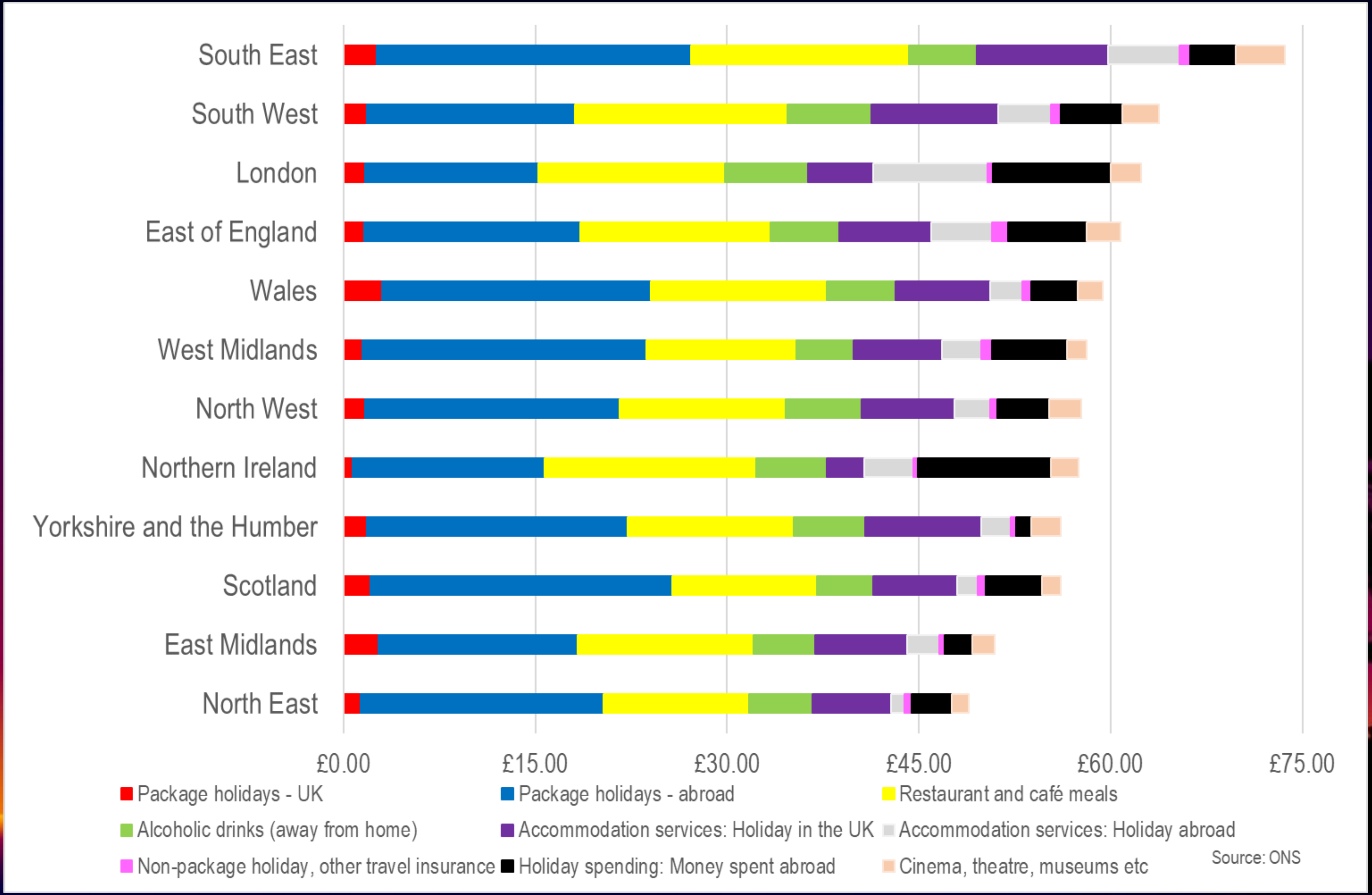


Gross disposable household income per head indexed to UK = 100 (Source: ONS)

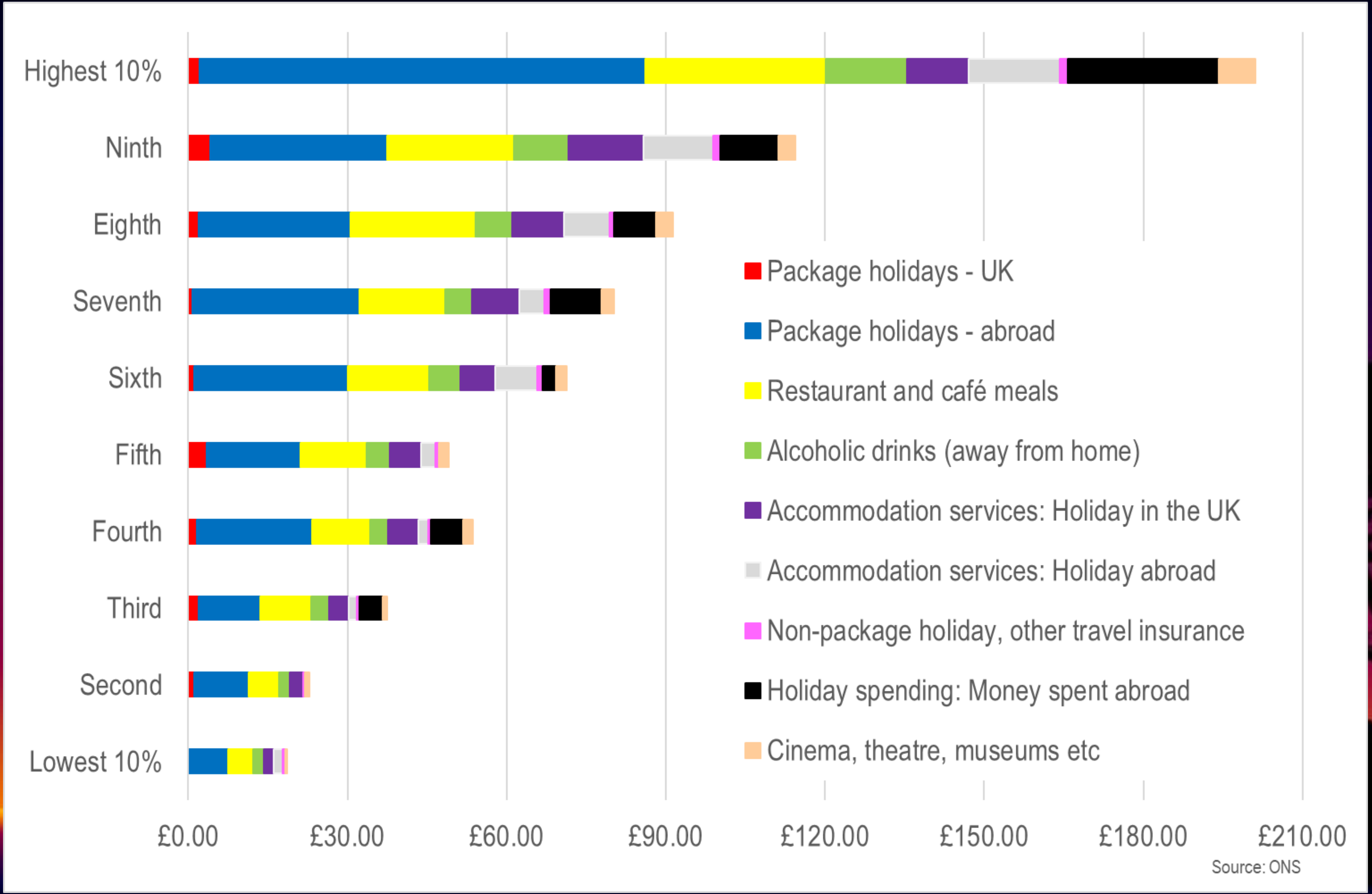
London	142
South East	114
East	104
South West	**100**
Scotland	92
East Midlands	87
North West	87
West Midlands	85
Yorkshire and The Humber	85
Northern Ireland	82
Wales	81
North East	80

North Somerset	109
Bath & North East Somerset and South Gloucestershire	105
Bristol, City of	99

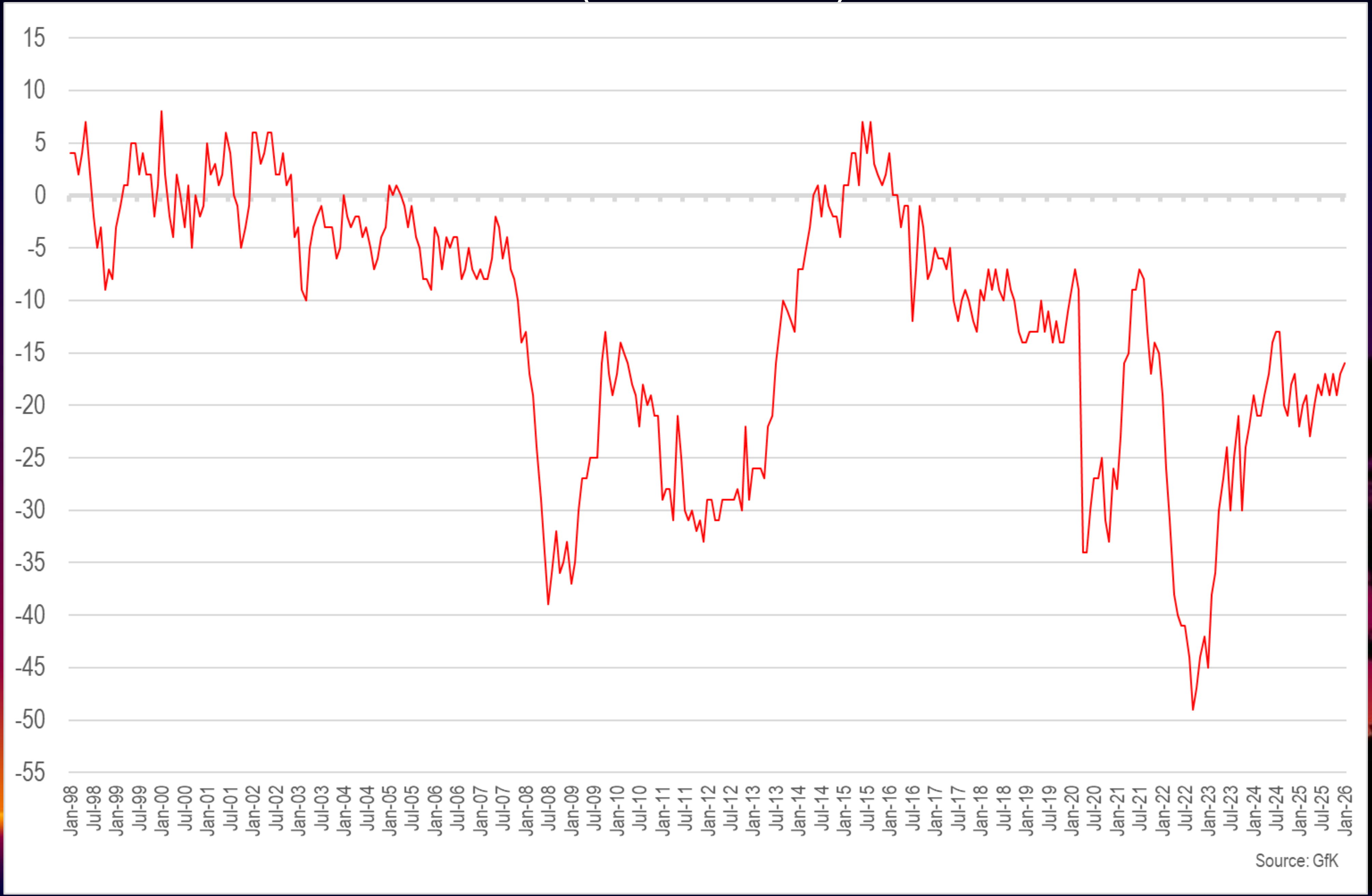
Average weekly household expenditure on tourism / hospitality goods / services



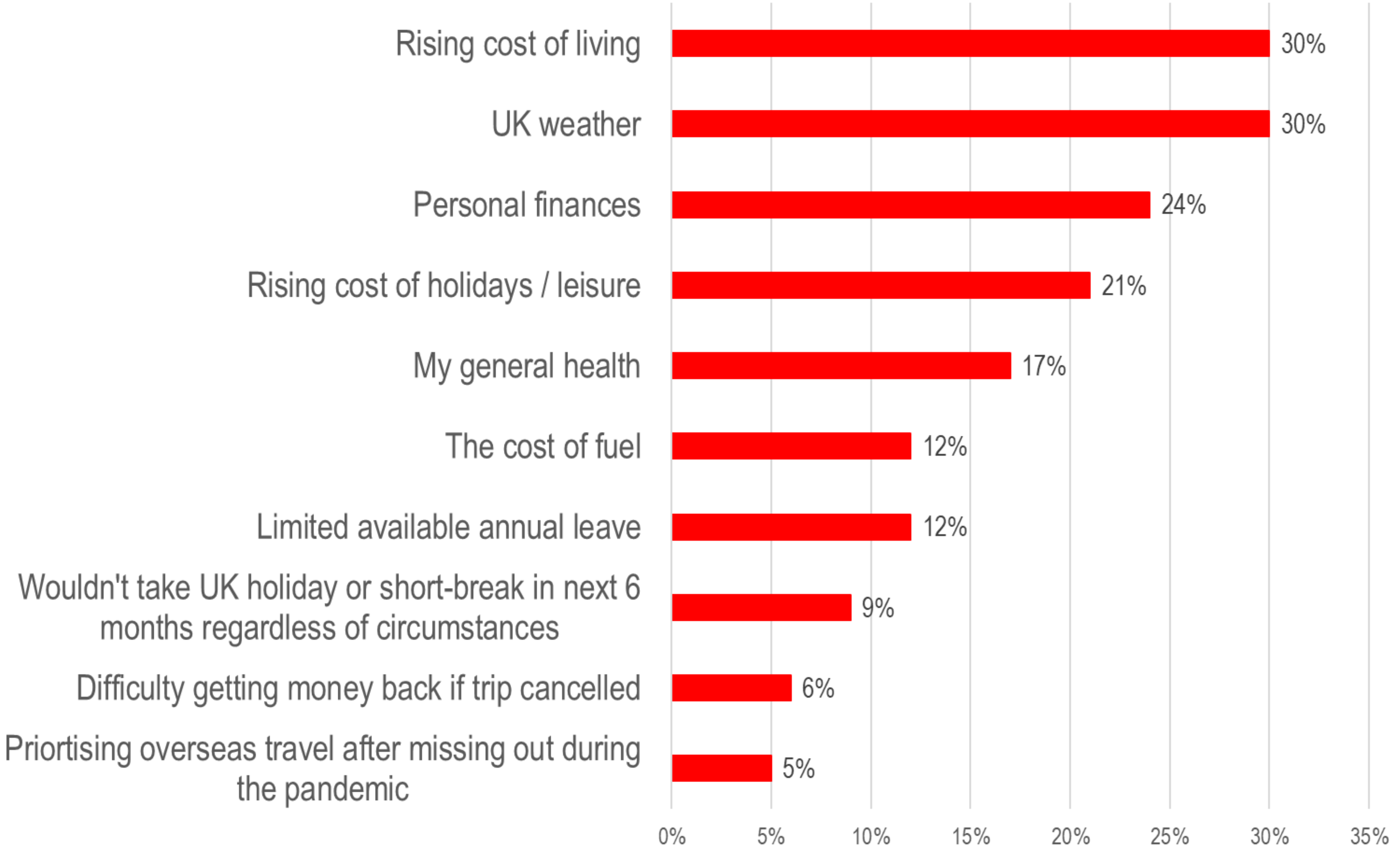
Household income decile drives expenditure on tourism / hospitality



UK Consumer Confidence (index score)

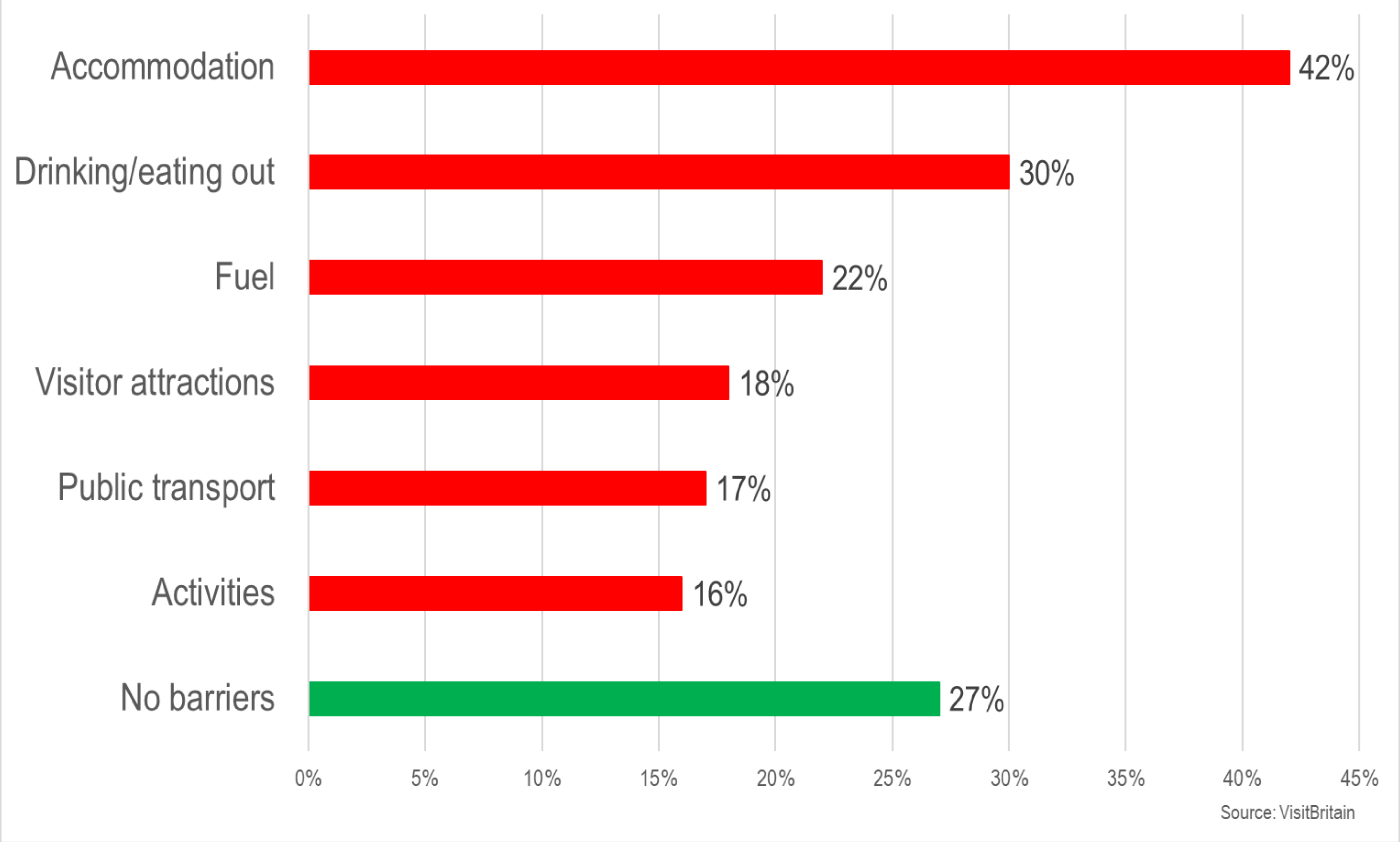


Barriers to taking a domestic overnight trip in next 6 months



Source: VisitBritain

Financial barriers to taking a domestic overnight trip in next 6 months



Financial barriers Britain chooses to levy on inbound visitors

APD from 1st April 2026	Reduced rate	Standard rate
Domestic	£8	£16
Band A	£15	£32
Band B	£102	£244
Band C	£106	£253

APD from 1st April 2027	Reduced rate	Standard rate
Domestic	£8.26	£16.52
Band A	£15.49	£33.04
Band B	£105.33	£251.95
Band C	£109.46	£261.25

Unlike most of our competitors, Britain does not offer a tax-free shopping scheme

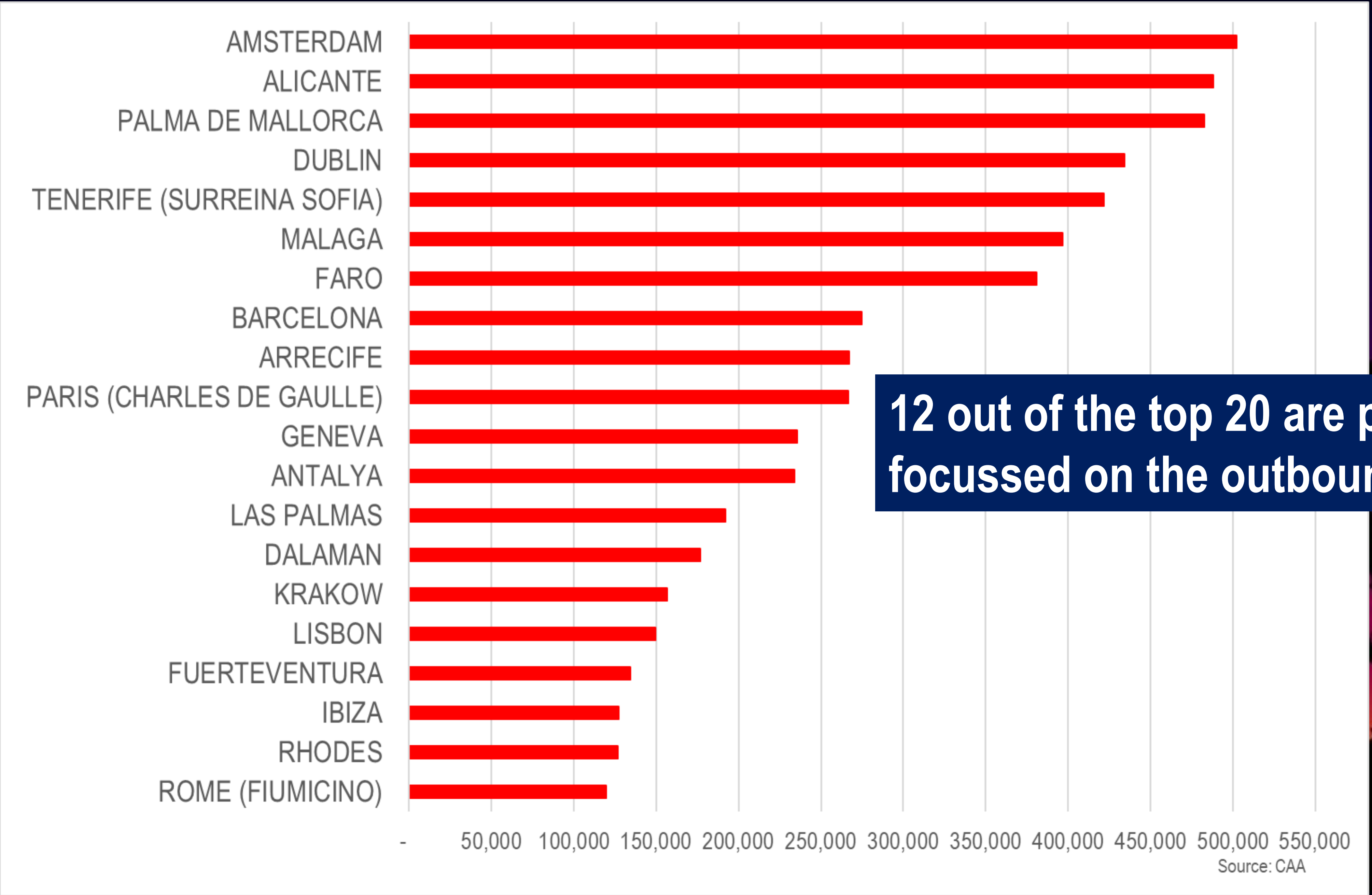
Current visa fees, likely to increase by 3% above inflation in April

Visit visa - short up to 6 months	£127
Visit visa - long up to 2 years	£475
Visit visa - long up to 5 years	£848
Visit visa - long up to 10 years	£1,059
Student	£524
Child student	£524
Short-term student studying English language for 6-11 months	£214
Youth Mobility Scheme	£319

Apart from Irish citizens, visitors who don't need a visa require an ETA at a cost of £16, set to rise to £20 from April

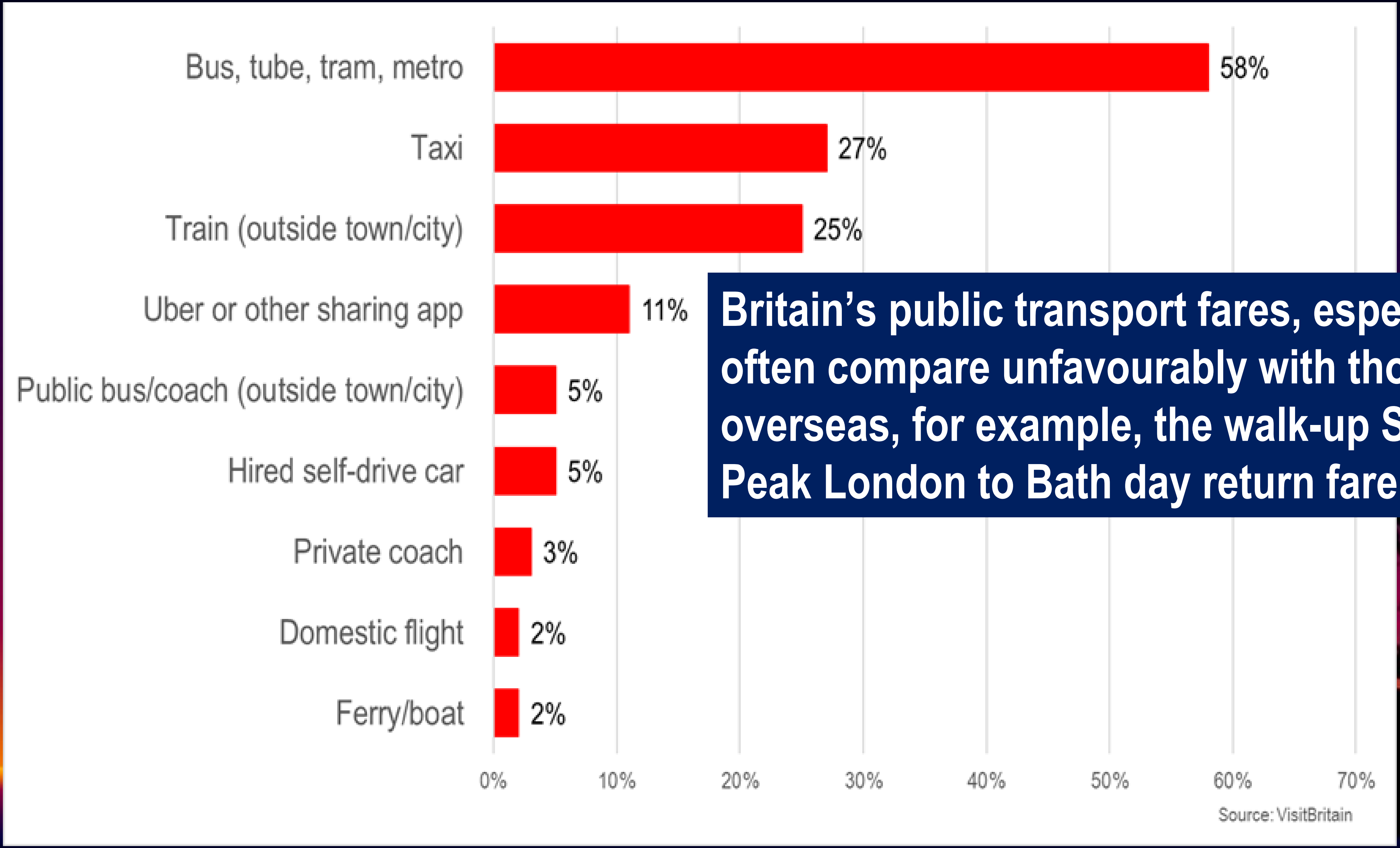
Means of transport

Busiest international air routes for Bristol Airport in 2024



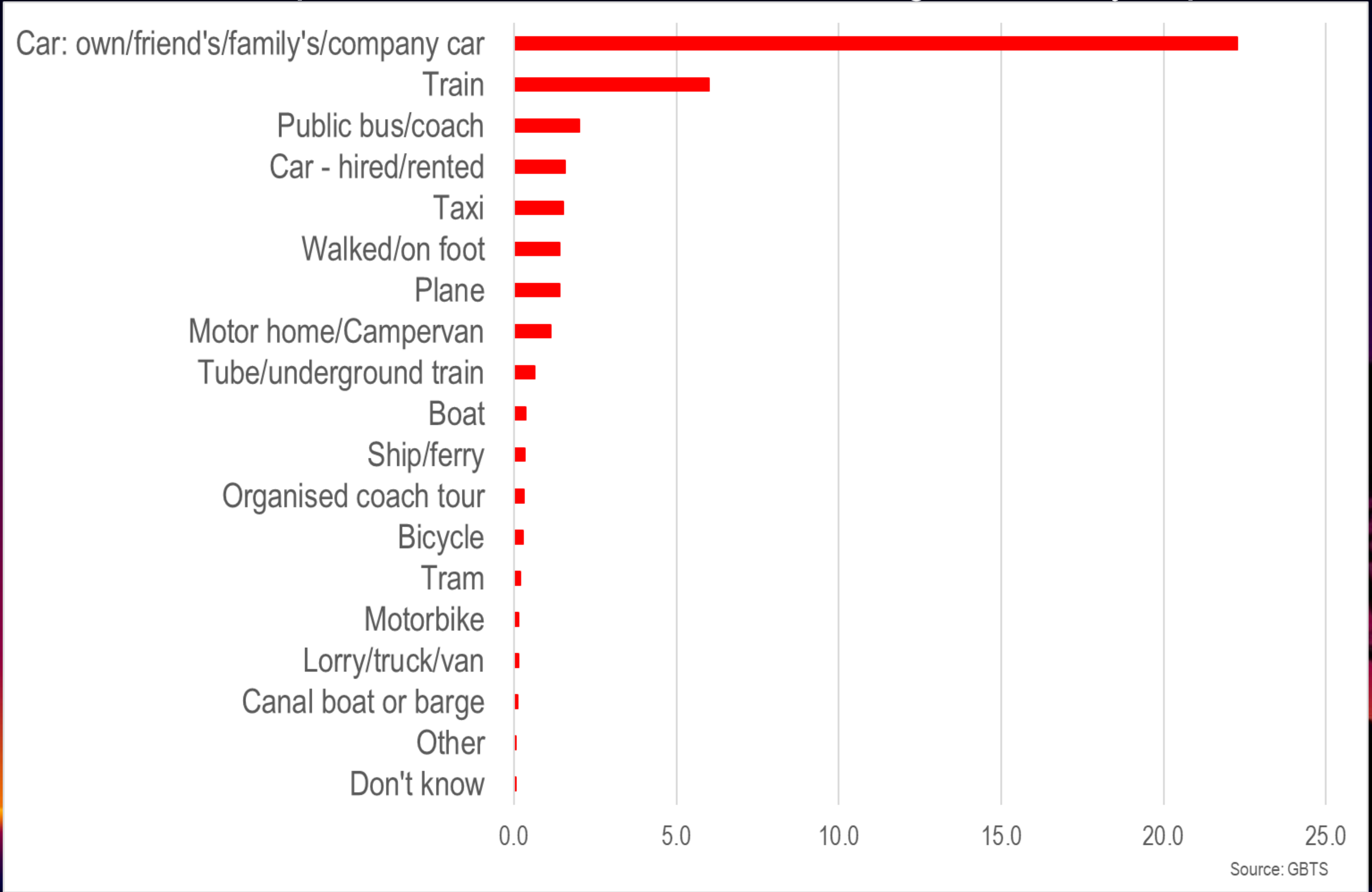
12 out of the top 20 are primarily focussed on the outbound market

Proportion of inbound holiday visitors using each mode to explore Britain

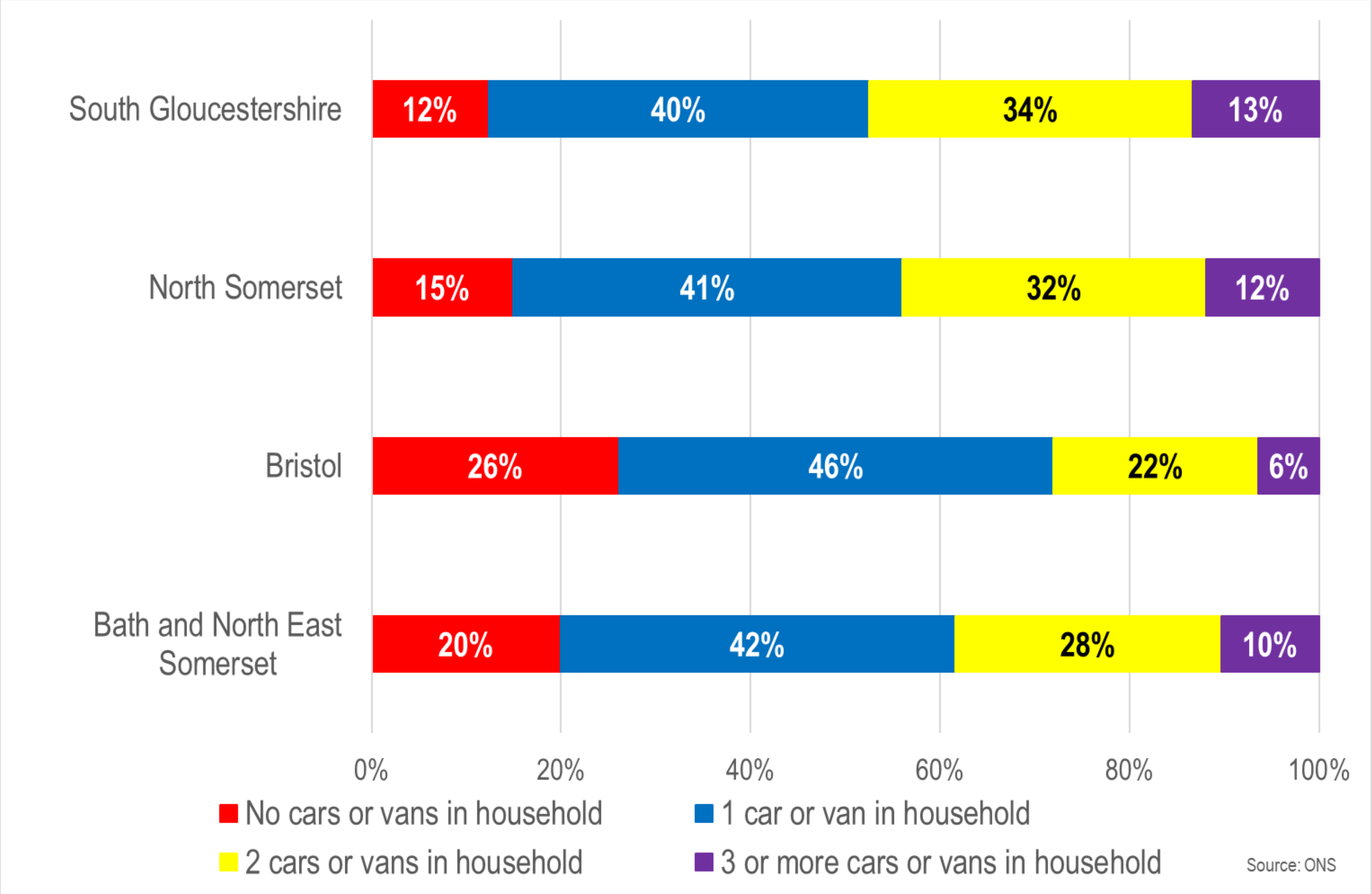


Britain's public transport fares, especially rail, often compare unfavourably with those overseas, for example, the walk-up Super Off-Peak London to Bath day return fare is £75.90

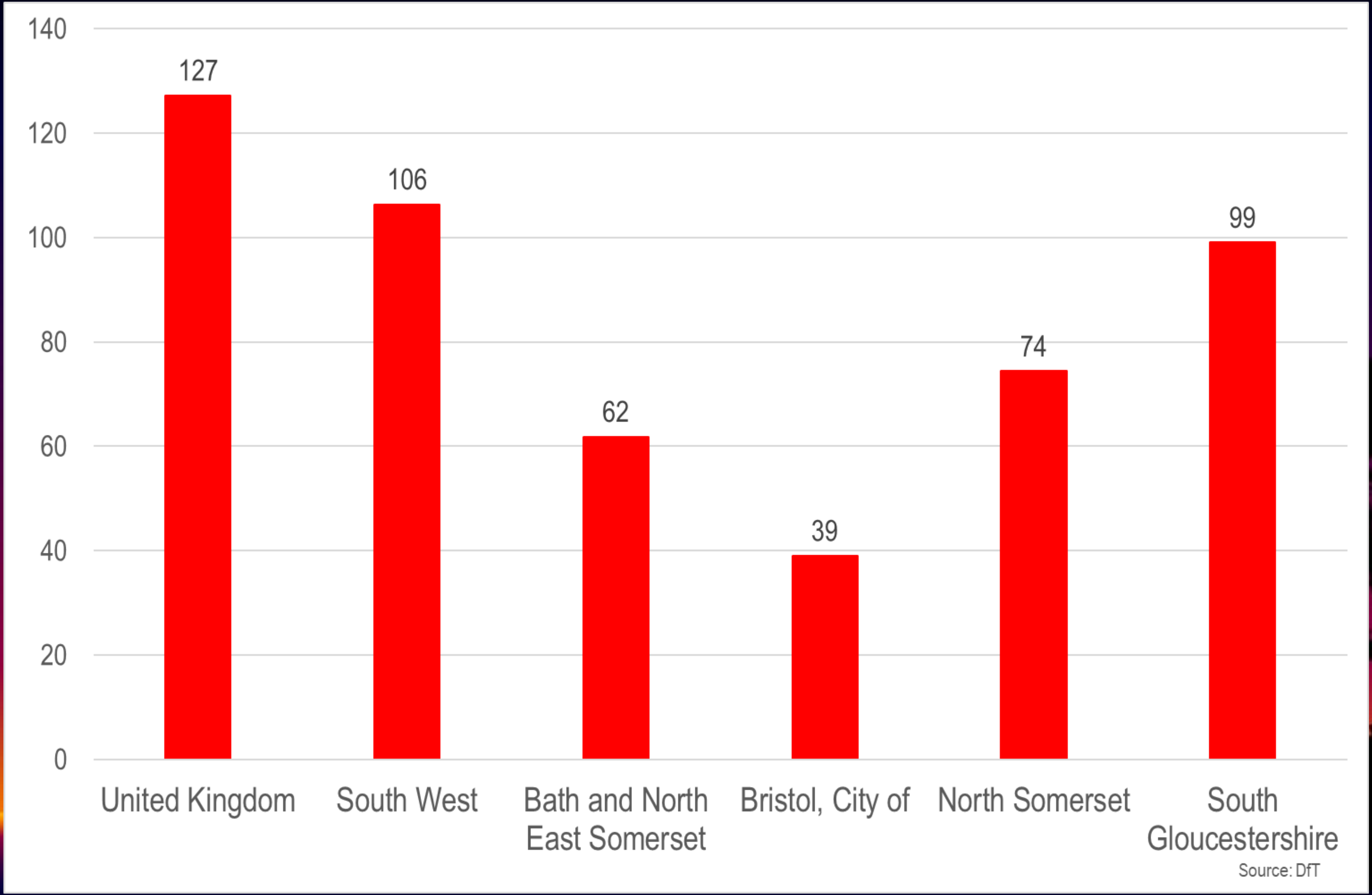
Mode of transport used for domestic overnight holiday trips in 2024 (millions)



Household car availability among the local population

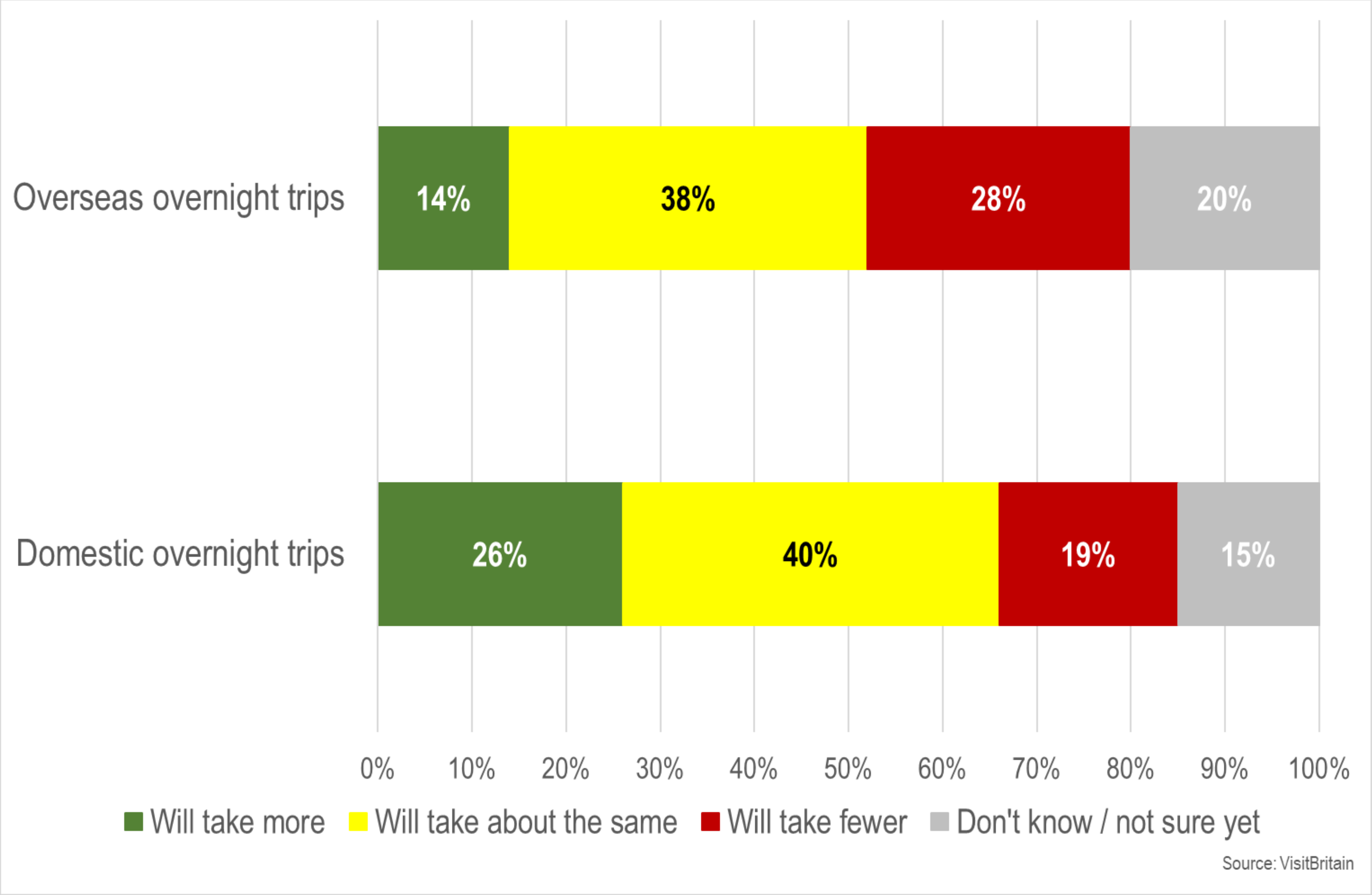


Publicly available EV charging devices per 100,000 of population (October 2025)



Outlook

Trip intentions for next 12 months compared with past twelve months



Domestic Tourism Outlook

- Consumer sentiment remains downbeat with negligible growth in disposable income, while the cost of travel and tourism continues to increase
- Expected reductions in interest rates will ease financial pressures for some in the coming months, with those in receipt of the minimum wage set to see this increase by 4.1% in April
- Bargains still exist, but airfares are on an upward trajectory, and APD will increase in April, potentially slowing growth in outbound travel demand
- Tourism businesses are competing for consumers’ time as well as their cash; according to Ofcom adults now spend four and a half hours per day online
- The FIFA World Cup may impact leisure behaviour during June and July

Inbound Tourism Outlook

- IMF forecast weak economic growth in most of our European source markets
- The US economy is more buoyant, but geopolitics may impact transatlantic demand, plus the FIFA World Cup may distort transatlantic airfares
- A plausible hypothesis is that European destinations may benefit if travellers shun the US, with this argument extending to the inbound study sector
- Progress on a Youth Mobility Scheme with the EU has the potential to unlock demand, and help visitor economy businesses meet their workforce needs
- Achieving the government target of 50 million inbound visits by 2030 will be exceptionally challenging…
- …our connectivity, well-regarded heritage and cultural offer will help, but actions that improve rather than harm our competitiveness are just as vital

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