

Quarterly Inbound Update

Total GB*

Provisional Q3 & Q4 2024 (July to December)

International Passenger Survey by the ONS (Official Statistics in Development)

Published 13th June 2025

* 2024 data is at the GB level, as opposed to UK level data which is usually published



Introduction

This report is based on the **provisional estimates** from the International Passenger Survey (IPS) data released by the Office for National Statistics (ONS) on the morning of **13th June 2025**, covering **Q3 and Q4 2024**. See the latest IPS [data publication](#) and [update on improvements to the travel and tourism statistics](#) on the ONS website.

Please note due to the ONS' ongoing planned improvements to the travel and tourism statistics:

- The Q3 and Q4 2024 data are badged as '*official statistics in development*' and estimates are subject to future change as further improvements to the methods are introduced.
- Northern Ireland data is not available in this publication due to the [changes in how data is being collected for Northern Ireland in 2024](#). Therefore, 2024 data only covers inbound visits to Great Britain, as opposed to the United Kingdom which is usually reported, and many data points are therefore slightly lower. UK level data will be available in the [Travel Trends 2024](#) publication. This itself only causes a minor impact on the comparability of 2024 data with previous years, as Northern Ireland makes up a small proportion of overall UK inbound visits and spend (c.1%).
- VisitBritain have made comparisons between 2024 GB totals and 2019/2023 UK totals, but the ONS is not doing so and comparisons between Q3/Q4 2024 data and prior data are not endorsed by the ONS.
- VisitBritain notes that the decline in visit numbers this data shows for the second half of 2024, compared to 2023, is in contrast to several other data sources that we have access to, which suggest moderate growth. In particular, there is a sharp decline in visits by ferry in the IPS data. We have included trended data for transparency and completeness, but we urge caution when interpreting these estimates and advise users to note the ONS' badging of the Q3 and Q4 data as '*official statistics in development*'. The ONS will conduct further investigation into the survey design and administrative data used for calibration to better understand this difference.
- Whilst the IPS data collection method has been harmonised with the Civil Aviation Authority, the data has not yet been incorporated alongside the IPS data, with plans to do so by the Q3 2025 publication.
- The ONS are also undertaking a review of the historical data, so previous years data may be subject to marginal change.

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Explore the quarterly IPS data in more detail on the [VisitBritain website](#) via the pivot tables (Excel) and interactive dashboards.



See additional analysis from the IPS survey covering [accommodation stayed in, states of residence, long term terms, subregional and towns](#) data.



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1. Summary

Total Great Britain

Summary

Provisional estimates suggest that inbound visits were just behind pre-COVID levels in 2024, with moderate growth vs 2023. Spend remained below 2019 and 2023 levels in real terms. These numbers are badged as 'official statistics in development' and we urge caution with trend analysis, especially for the second half of the year.

- Overall, there were 39.2m inbound **visits** to Great Britain in 2024, just below pre-COVID levels (-4%) but up 3% vs 2023.
- The **first half of the year** saw strong growth in visits (11%) although spend was slightly down on 2023's record. Visits in the **second half of the year** were 3% down on 2023 in these figures, with spend equalling 2023, although we caution that these are statistics in development and other sources, such as flight bookings data, credit/debit card data, and Home Office data, suggest that inbound arrivals were up on 2023 in the second half of the year.
- Visitors **spent** £31.0bn in 2024 which was below 2019 and 2023 when adjusted for inflation, and on par with 2023 in nominal terms.
- **Nights** totalled at 288.8m and were on par with 2019 but down by 1% vs 2023.
- The **average length of stay** in 2024 remained above 2019 levels but saw a slight decrease vs 2023, whilst **average spend per visit** and **average spend per night** tracked lower in real terms vs both comparison years.
- **VFR** visits saw record visits in 2024 whilst spend declined YoY, **holiday** visits and spend were similar to the previous year, whilst **business** visits and spend were down vs 2019 but saw moderate growth vs 2023.
- **European** visits were just short of pre-COVID levels but saw growth vs 2023 with record spend, **North America** led recovery seeing both record visits and spend in 2024, whilst **Rest of World** saw YoY declines although there is much variation by market.
- **Visits** from USA, France and Germany led for volume in 2024 with alongside growing demand from long haul markets, Australia, New Zealand and Saudi Arabia. For **spend**, the USA and GCC were the highest spending markets with European markets seeing the highest YoY growth and New Zealand, USA and Austria showing highest growth vs pre-COVID. China showed strong YoY growth in visits, although overall recovery from North East Asian markets remains sluggish vs pre-COVID levels for both visits and spend.

2. Latest Inbound GB statistics

Provisional full year 2024

Volume and Value headlines 2024

Total	2019	2023	2024	% change vs 2019	% change vs 2019 (in real terms)	% change vs 2023	% change vs 2023 (in real terms)
Visits (000)	40,857	37,959	39,214	-4%		3%	
Spend (£m)	£28,448	£31,075	£30,982	9%	-12%	0%	-3%
Nights (000)	289,628	292,870	288,805	0%		-1%	

- Provisional estimates from the ONS show that there were 39.2m inbound **visits** to Great Britain (GB) in 2024. Visits were just below 2019 (pre-COVID) by 4% but were up 3% vs 2023.
- Inbound visitors **spent** £31.0bn during 2024, up 9% vs 2019 and on par with 2023. When adjusted for inflation (real terms), spend in 2024 spend was down 12% vs 2019 and down 3% vs 2023.
- In total, 288.8m **nights** were spent in GB, on par with 2019 but down 1% vs 2023.

International Passenger Survey by the ONS 2024P. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated. Nominal terms = not adjusted for inflation. Real terms = adjusted for inflation. Real term spend calculated using the CPI from the [ONS](#). Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information.

Averages 2024

Total	2024	% change vs 2019	% change vs 2019 (in real terms)	% change vs 2023	% change vs 2023 (in real terms)
Average Spend per Visit (£)	£790	13%	-9%	-3%	-6%
Average Length of Stay (days)	7.4	4%		-5%	
Average Spend per Night (£)	£107	9%	-12%	1%	-1%

- The **average spend per visit** by inbound visitors to GB was £790 in 2024, up 13% vs 2019 but down 3% vs 2023. In real terms, average spend was down 9% vs 2019 and down 6% vs 2023.
- The **average length of stay** by an inbound visitor was 7.4 nights, just above than pre-COVID levels in 2019 but down 5% vs 2023.
- **Average spend per night** was £107 across the year, up 9% vs 2019 and up 1% vs 2023. However, in real terms, spend per night was down 12% vs 2019 and down 1% vs 2023.

International Passenger Survey by the ONS 2024P. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated. Nominal terms = not adjusted for inflation. Real terms = adjusted for inflation. Real term spend calculated using the CPI from the [ONS](#). Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information.

Journey Purpose 2024 (Visits)

Visits (000)	2019	2023	2024	% change vs 2019	% change vs 2023
Holiday	16,905	15,883	16,013	-5%	1%
VFR	12,427	12,848	13,336	7%	4%
Business	8,670	6,476	6,804	-22%	5%
Study	600	404	534	-11%	32%
Miscellaneous (Excl. study)	2,256	2,349	2,528	12%	8%

- There were 16.0m **holiday** visits in 2024, down 5% vs 2019 and up 1% vs 2023. They account for 41% of all visits.
- **Visit to friends and relatives** totalled at a record 13.3m visits, up 7% vs 2019 and up 4% vs 2023. They accounted for 34% of all visits, still higher than 2019 levels where they had 30% share.
- Accounting for 17% of all visits in 2024, **business visits** totalled at 6.8m visits, trailing 2019 levels but showing YoY growth, up 5% vs 2023.
- **Study** visits were still behind 2019 levels by 11% but up 32% vs 2023, totalling at 534,000 visits.
- Remaining visits under '**miscellaneous**' reached 2.5m in 2024, up 12% vs 2019 and up 8% vs 2023.

Journey Purpose 2024 (Spend)

Spend (£m)	2019	2023	2024	% change vs 2019	% change vs 2023
Holiday	£13,341	£14,879	£14,730	10%	-1%
VFR	£6,408	£8,143	£7,570	18%	-7%
Business	£5,823	£5,241	£5,661	-3%	8%
Study	£1,442	£1,158	£1,313	-9%	13%
Miscellaneous (Excl. study)	£1,394	£1,586	£1,625	17%	2%

- **Holiday** spend totalled at £14.7m, up 10% vs 2019 but down 1% vs 2023. Holiday spend made up 48% of total spend.
- Spend from those **visiting friends and relatives** also saw a decline vs 2023 at -7%, but remained above 2019 levels, reaching £7.6bn. VFR spend made up 24% of spend, lower than the previous year but still ahead of the 2019 share.
- **Business** visitors spent £5.7bn and saw YoY growth (8%), although spend still had not reached pre-COVID levels (-3%).
- **Study** spend saw YoY growth to £1.3bn, up 13% vs 2023 but down 9% vs 2019.
- Remaining spend came from '**miscellaneous**' visits which saw 17% growth vs 2019 and 2% growth vs 2023.

International Passenger Survey by the ONS 2024P. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information. Spend from transit visitors is excluded above.

Global Regions 2024 (Visits)

Visits (000)	2019	2023	2024	% change vs 2019	% change vs 2023
Total Europe	27,293	24,826	25,987	-5%	5%
→ EU Total	24,828	22,499	23,799	-4%	6%
→ EU 15	20,328	18,472	20,022	-2%	8%
→ Other EU	4,500	4,026	3,777	-16%	-6%
→ Rest of Europe	2,465	2,327	2,188	-11%	-6%
North America	5,373	6,125	6,557	22%	7%
Rest of World	8,191	7,009	6,670	-19%	-5%

- Inbound visits from **Europe** totalled at 26.0m in 2024, up 5% vs 2023 but still trailing 2019 levels by 5%. A similar pattern was seen for EU visits whilst visits from the Rest of Europe saw YoY declines.
- **North America** visits reached a record 6.6m, up 22% vs 2019 and up 7% vs 2023.
- Visits from the **Rest of World** reached 6.7m, although there is much variation by market which you can see on the next slides.

Global Regions 2024 (Spend)

Spend (£m)	2019	2023	2024	% change vs 2019	% change vs 2023
Total Europe	£12,407	£13,430	£13,893	12%	3%
→ EU Total	£10,661	£11,504	£12,116	14%	5%
→ EU 15	£8,733	£10,026	£10,731	23%	7%
→ Other EU	£1,928	£1,478	£1,385	-28%	-6%
→ Rest of Europe	£1,746	£1,926	£1,777	2%	-8%
North America	£4,918	£7,227	£7,981	62%	10%
Rest of World	£11,123	£10,417	£9,108	-18%	-13%

- Inbound spend from **Europe** totalled at a record £13.8bn in 2024, up 3% vs 2023 and up 12% vs 2019. As with spend, a similar pattern was seen for EU spend whilst visits from the Rest of Europe saw YoY declines.
- **North America** visits reached a record £8.0bn, up 62% vs 2019 and up 10% vs 2023.
- Visits from the **Rest of World** reached £9.1bn, down 18% vs 2019 and down 13% vs 2023. Please see market variation on the next slides.

International Passenger Survey by the ONS 2024P. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information.

Selected Market Highlights 2024 (Visits)

Visits (000)	2024	% change vs 2019	% change vs 2023
Australia	1,228	15%	5%
Austria	352	3%	5%
Belgium	883	-22%	2%
Brazil	314	8%	-9%
Canada	941	8%	-6%
China	466	-47%	27%
Denmark	658	-5%	5%
France	3,670	3%	16%
Germany	3,358	4%	14%
GCC*	1,044	-14%	-3%
Hong Kong (SAR)**	170	-58%	-34%
India	603	-13%	0%
Irish Republic	2,961	4%	3%
Italy	1,869	-15%	10%
Japan	228	-41%	1%
Netherlands	1,973	-1%	1%
New Zealand	291	55%	10%
Norway	622	-4%	4%
Poland	1,451	-12%	-11%
Romania	707	-22%	-12%
Saudi Arabia	348	58%	22%
South Korea	171	-43%	-6%
Spain	2,577	11%	17%
Sweden	611	-23%	-9%
Switzerland	851	-8%	-12%
United Arab Emirates	375	-32%	-21%
USA	5,616	25%	10%

In 2024, the volume of inbound tourism was driven by strong growth in visits from core markets such as the USA, France, Germany, and Spain, alongside growing demand from long-haul markets including Australia, New Zealand, and Saudi Arabia — with the latter two significantly exceeding 2019 levels. Whilst China showed strong YoY growth, overall recovery from North East Asian markets remains sluggish compared to pre-COVID levels.

- **Top inbound markets for spend in 2024:** USA, France, Germany, Irish Republic and Spain.
- **Record visits in 2024:** Australia, Austria, New Zealand, Saudi Arabia, Spain and the USA.
- **Strongest growth in 2024 vs 2023:** China (27%), Saudi Arabia (22%), Spain (17%), France (16%) and Germany (14%).
- **Largest declines in 2024 vs 2023:** Hong Kong SAR (-34%), UAE (-21%), Romania (-12%), Switzerland (-12%) and Poland (-11%).
- **Strongest growth in 2024 vs 2019:** Saudi Arabia (58%), New Zealand (55%), USA (25%), Australia (15%) and Spain (11%).
- **Largest declines in 2024 vs 2019:** Hong Kong SAR (-58%), China (-47%), South Korea (-43%), Japan (-41%) and UAE (-32%).

International Passenger Survey by the ONS 2024P. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates. **SAR refers to Special Administrative Region.

Selected Market Highlights 2024 (Spend)

Spend (£m)	2024	% change vs 2019	% change vs 2023
Australia	£1,648	40%	3%
Austria	£280	63%	15%
Belgium	£487	36%	1%
Brazil	£296	18%	-30%
Canada	£850	16%	-12%
China	£690	-60%	-14%
Denmark	£422	28%	17%
France	£1,906	36%	17%
Germany	£2,026	29%	11%
GCC*	£2,218	-15%	-9%
Hong Kong (SAR)**	£227	-59%	-40%
India	£778	3%	-3%
Irish Republic	£1,035	8%	-16%
Italy	£1,069	-4%	10%
Japan	£246	-33%	1%
Netherlands	£1,131	42%	1%
New Zealand	£363	112%	5%
Norway	£457	5%	2%
Poland	£386	-22%	-18%
Romania	£257	-42%	-13%
Saudi Arabia	£788	26%	12%
South Korea	£175	-39%	-20%
Spain	£1,302	33%	22%
Sweden	£359	-10%	-12%
Switzerland	£616	8%	-18%
United Arab Emirates	£618	-29%	-32%
USA	£7,131	70%	14%

Inbound spend was led by high spending markets in 2024 such as the USA, GCC*, Germany, France and Australia, with record spend also seen from a broad range of European and long haul markets (in nominal terms). Highest YoY growth was seen from European markets and, compared to 2019, growth was particularly strong from New Zealand, the USA and Austria. As with visits, spend from North East Asian markets remained well below 2019 levels and saw YoY declines as well (apart from Japan).

- **Top inbound markets for spend in 2024:** USA, GCC*, Germany, France and Australia.
- **Record spend in 2024:** Australia, Austria, Belgium, Denmark, France, Germany, Netherlands, New Zealand, Spain and the USA.
- **Strongest growth in 2024 vs 2023:** Spain (22%), Denmark (17%), France (17%), Austria (15%) and USA (14%).
- **Largest declines in 2024 vs 2023:** Hong Kong SAR (-40%), UAE (-32%), Brazil (-30%), South Korea (-20%), Switzerland (-18%) and Poland (-18%).
- **Strongest growth in 2024 vs 2019:** New Zealand (112%), USA (70%), Austria (63%), Netherlands (42%) and Australia (40%).
- **Largest declines in 2024 vs 2019:** China (-60%), Hong Kong SAR (-59%), Romania (-42%), South Korea (-39%) and Japan (-33%).

International Passenger Survey by the ONS 2024P. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates. **SAR refers to Special Administrative Region.

3. Latest inbound GB statistics

Provisional Q3 & Q4 2024 (July to December)

Volume and Value headlines Q3 and Q4 2024

Total	Q1 2024	% change vs Q1 2019	% change vs Q2 2023	Q2 2024	% change vs Q2 2019	% change vs Q2 2023	Q3 2024	% change vs Q3 2019	% change vs Q3 2023	Q4 2024	% change vs Q4 2019	% change vs Q4 2023
Visits (000)	8,731	5%	14%	10,778	4%	9%	10,408	-12%	-5%	9,297	-10%	-2%
Spend (£m)	£5,530	15%	-2%	£7,902	15%	0%	£10,153	10%	0%	£7,397	-2%	0%
Nights (000)	58,439	15%	6%	76,408	10%	5%	90,360	-12%	-9%	63,599	-5%	-2%

- Provisional estimates from the ONS show **visits** to Great Britain in Q3 and Q4 2024 saw a dip vs both 2019 and 2023 resulting in a weaker second half of the year. Visits were down 12% and 10% vs pre-COVID 2019 levels and saw a gentle YoY decline at -5% and -2% respectively.
- Visitor **spend** in the last two quarters was on par with the same quarters in 2023. Q3 was stronger vs 2019 with visitors spending a record £10.2bn but Q4 was slightly weaker with visitors spending £7.4bn, down 2% vs 2019.
- Similar to visits, **nights** saw declines vs 2023 and 2019.
- Please see slide 2 regarding comparisons of the second half of 2024 with previous years.*

International Passenger Survey by the ONS 2024P. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated. Nominal terms = not adjusted for inflation. Real terms = adjusted for inflation. Real term spend calculated using the CPI from the [ONS](#). Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information.

Value headlines in real terms Q3 and Q4 2024

Total change vs 2019	% change Q1 2024 vs Q1 2019	% change Q2 2024 vs Q2 2019	% change Q3 2024 vs Q3 2019	% change Q4 2024 vs Q4 2019
NOMINAL	15%	15%	10%	-2%
REAL	-7%	-8%	-11%	-21%

Total change vs 2023	% change Q1 2024 vs Q1 2023	% change Q2 2024 vs Q2 2023	% change Q3 2024 vs Q3 2023	% change Q4 2024 vs Q4 2023
NOMINAL	-2%	0%	0%	0%
REAL	-5%	-2%	-2%	-3%

- When adjusted for inflation (real terms), spend in Q3 was down 11% vs 2019, and for Q4 spend was down by around one fifth (-21%) vs 2019.
- Spend was down vs 2023 when adjusted for inflation, although to a lesser extent; visits down 2% in Q3 and down 3% in Q4.

International Passenger Survey by the ONS 2024P. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated. Nominal terms = not adjusted for inflation. Real terms = adjusted for inflation. Real term spend calculated using the CPI from the [ONS](#). Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information.

Averages Q3 and Q4 2024

Total	Q1 2024	% change vs Q1 2019	% change vs Q2 2023	Q2 2024	% change vs Q2 2019	% change vs Q2 2023	Q3 2024	% change vs Q3 2019	% change vs Q3 2023	Q4 2024	% change vs Q4 2019	% change vs Q4 2023
Average Spend per Visit (£)	£633	10%	-13%	£733	10%	-8%	£975	26%	5%	£796	8%	1%
Average Length of Stay (days)	6.7	10%	-7%	7.1	6%	-4%	8.7	0%	-5%	6.8	5%	0%
Average Spend per Night (£)	£95	0%	-7%	£103	4%	-5%	£112	26%	11%	£116	3%	2%

- On **average, visitors spent** £975 per visit in Q3 2024, up vs both 2019 and 2023 in nominal and real terms. In Q4, visitors spent £796 per visit, up in nominal terms but down in real terms vs both years.
- **Average length of stay** was 8.7 days in Q3 2024, on par with 2019 but lower than 2023, whilst in Q4 visitors stayed for an average on 6.8 days, higher than 2019 but on par with the previous year.
- **Average spend per night** was £112 in Q3 2024, up in nominal and real terms vs 2019 and 2023. In Q4 2024, visitors spent £116 per night on average, up in nominal terms but down in real terms vs both 2019 and 2023.

International Passenger Survey by the ONS 2024P. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated. Nominal terms = not adjusted for inflation. Real terms = adjusted for inflation. Real term spend calculated using the CPI from the [ONS](#). Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information.

Journey Purpose Q3 and Q4 2024 (Visits)

Visits (000)	Q1 2024	% change vs Q1 2019	% change vs Q2 2023	Q2 2024	% change vs Q2 2019	% change vs Q2 2023	Q3 2024	% change vs Q3 2019	% change vs Q3 2023	Q4 2024	% change vs Q4 2019	% change vs Q4 2023
Holiday	3,307	12%	19%	4,502	0%	2%	4,459	-17%	-10%	3,745	-8%	0%
VFR	2,999	12%	5%	3,291	10%	5%	3,738	9%	4%	3,307	-1%	1%
Business	1,746	-18%	23%	2,055	-6%	21%	1,447	-33%	-9%	1,556	-29%	-12%
Study	78	-2%	6%	132	-14%	48%	216	-4%	43%	107	-24%	20%
Misc.	600	22%	5%	799	53%	32%	547	-20%	-13%	582	5%	8%

- After seeing YoY growth in the first half of the year, **holiday** visits saw a dip from July to December 2024. Q3 saw 4.5m visits, down 10% vs 2023 and Q4 saw 3.7m visits, on par with 2023. Both quarters were down vs 2019.
- **Visits to friends and relatives** saw sustained growth in Q3 with a record 3.7m visits, up 4% vs 2023 and up 9% vs 2019, but a weaker Q4 with 3.3m visits, similar to both 2019 and 2023 levels.
- **Business** visits saw a weaker July-December vs the first half of the year with visits down by around one third in both quarters when comparing to 2019. Both quarters saw gentler declines vs 2023.
- **Study** visits tend to fluctuate but the second half of the year saw YoY growth, with visits still below 2019 levels.
- Remaining visits under '**miscellaneous**' saw a weaker Q3 but growth vs 2019 and 2023 in Q4.

Journey Purpose Q3 and Q4 2024 (Spend)

Spend (£m)	Q1 2024	% change vs Q1 2019	% change vs Q2 2023	Q2 2024	% change vs Q2 2019	% change vs Q2 2023	Q3 2024	% change vs Q3 2019	% change vs Q3 2023	Q4 2024	% change vs Q4 2019	% change vs Q4 2023
Holiday	£2,342	13%	11%	£3,671	12%	-11%	£5,306	12%	-1%	£3,411	4%	4%
VFR	£1,540	32%	-8%	£1,932	23%	1%	£2,521	24%	2%	£1,577	-5%	-25%
Business	£1,156	-3%	3%	£1,543	4%	22%	£1,371	-9%	-4%	£1,591	-3%	12%
Study	£174	51%	-38%	£242	-12%	7%	£513	-3%	22%	£384	-27%	66%
Misc.	£304	22%	-27%	£499	75%	32%	£403	2%	1%	£418	-10%	7%

- **Holiday** spend in Q3 was similar to the previous year at £5.3bn but visitors spent a record £3.4bn in Q4, up 4% vs the previous year. Spend also remained higher than pre-COVID levels.
- Those **visiting friends and relatives** spent £2.5bn in Q3, up 24% vs 2019 and up 2% vs 2023. Q4 was much weaker with visitors spending £1.6bn, down 5% vs 2019 and down by 25% vs 2023.
- **Business** spend remained below 2019 levels across both quarters. Spend saw YoY declines in Q3 but 12% growth in Q4.
- Spend from **study** visits can fluctuate but the second half of the year remained below 2019 levels and saw strong growth vs 2023.
- All other spend under '**miscellaneous**' saw moderate YoY growth across both quarters.

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Global Regions Q3 and Q4 2024 (Visits)

Visits (000)	Q1 2024	% change vs Q1 2019	% change vs Q2 2023	Q2 2024	% change vs Q2 2019	% change vs Q2 2023	Q3 2024	% change vs Q3 2019	% change vs Q3 2023	Q4 2024	% change vs Q4 2019	% change vs Q4 2023
Total Europe	6,220	3%	14%	7,077	3%	13%	6,288	-12%	-5%	6,402	-11%	-2%
→ EU Total	5,697	3%	15%	6,421	2%	13%	5,764	-11%	-4%	5,918	-9%	1%
→ EU 15	4,544	2%	15%	5,341	3%	14%	5,022	-7%	1%	5,116	-3%	6%
→ Other EU	1,153	6%	14%	1,080	0%	10%	742	-34%	-27%	802	-34%	-21%
→ Rest of Europe	524	5%	5%	656	8%	12%	525	-19%	-13%	484	-32%	-25%
North America	1,068	19%	7%	1,885	23%	-4%	2,130	22%	10%	1,474	24%	18%
Rest of World	1,443	4%	18%	1,816	-7%	7%	1,989	-33%	-17%	1,422	-25%	-16%

- Inbound visits from **Europe** dipped back below 2019 levels in the second half of the year, and also saw YoY declines.
- **North America** visits remained above 2019 levels and saw strong YoY growth with record visits in Q4 2024.
- Visits from the **Rest of World** saw large YoY declines across both quarters. There is much variation by market which you can see on the next slides.

Global Regions Q3 and Q4 2024 (Spend)

Spend (£m)	Q1 2024	% change vs Q1 2019	% change vs Q2 2023	Q2 2024	% change vs Q2 2019	% change vs Q2 2023	Q3 2024	% change vs Q3 2019	% change vs Q3 2023	Q4 2024	% change vs Q4 2019	% change vs Q4 2023
Total Europe	£2,662	19%	1%	£3,649	23%	13%	£4,189	13%	2%	£3,393	-3%	-2%
→ EU Total	£2,322	20%	4%	£3,182	24%	16%	£3,637	15%	3%	£2,975	0%	0%
→ EU 15	£1,987	24%	3%	£2,832	36%	16%	£3,263	24%	6%	£2,650	9%	4%
→ Other EU	£336	-2%	10%	£350	-27%	14%	£374	-32%	-16%	£325	-42%	-23%
→ Rest of Europe	£340	17%	-16%	£467	16%	-2%	£552	1%	0%	£418	-18%	-15%
North America	£970	19%	-11%	£2,077	42%	-9%	£2,942	84%	24%	£1,992	91%	35%
Rest of World	£1,898	8%	1%	£2,177	-12%	-9%	£3,022	-22%	-17%	£2,011	-33%	-19%

- Visitors spend from **Europe** reached a record £4.2bn in Q3 2024 but saw YoY declines in Q4.
- **North America** saw record spend in both Q3 and Q4 2024. Spend was up by around one quarter in Q3 and one third in Q4, when comparing to 2023.
- Remaining spend from the **Rest of World** declines across both quarters vs 2019 and 2023 – see market variation on the next slides.

International Passenger Survey by the ONS 2024P. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information.

Selected Market Highlights Q3 and Q4 2024 (Visits)

Visits (000)	Q1 2024	% change vs. Q1 2019	% change vs Q1 2023	Q2 2024	% change vs. Q2 2019	% change vs Q2 2023	Q3 2024	% change vs Q3 2019	% change vs Q3 2023	Q4 2024	% change vs Q4 2019	% change vs Q4 2023
Australia	182	31%	18%	306	13%	-1%	469	11%	3%	271	16%	8%
Austria	76	-6%	24%	81	-4%	-3%	86	1%	-8%	109	19%	12%
Belgium	191	-19%	-3%	212	-29%	-6%	261	-15%	10%	219	-25%	7%
Brazil	90	22%	-3%	85	40%	3%	80	-13%	-7%	59	-8%	-29%
Canada	154	17%	-7%	314	24%	17%	313	4%	-11%	160	-15%	-27%
China	99	-17%	488%	100	-51%	40%	152	-61%	-14%	115	-32%	11%
Denmark	113	-4%	-24%	189	2%	42%	178	-5%	-4%	178	-11%	11%
France	896	10%	33%	1,020	10%	25%	768	-14%	-8%	985	7%	16%
Germany	621	-8%	32%	961	20%	7%	989	5%	10%	787	-3%	14%
GCC*	254	18%	30%	258	4%	20%	332	-26%	-9%	200	-34%	-33%
Hong Kong (SAR)**	50	-29%	26%	58	-45%	-6%	44	-69%	-56%	18***	-80%	-67%
India	122	2%	36%	229	3%	23%	133	-43%	-28%	119	1%	-18%
Irish Republic	767	18%	4%	690	-4%	-5%	724	1%	-6%	780	2%	19%
Italy	428	-11%	2%	488	-12%	29%	534	-15%	34%	419	-21%	-16%
Japan	84	11%	48%	64	-32%	72%	28	-76%	-66%	52	-48%	4%
Netherlands	394	-1%	6%	604	31%	23%	514	-15%	-11%	460	-13%	-11%
New Zealand	32	49%	-13%	61	15%	-11%	131	72%	22%	67	81%	27%
Norway	137	-1%	-1%	152	2%	-5%	165	1%	11%	167	-15%	9%
Poland	482	26%	12%	461	12%	9%	209	-50%	-48%	299	-31%	-20%
Romania	252	-1%	18%	201	-7%	19%	134	-34%	-32%	120	-47%	-47%
Saudi Arabia	64	83%	20%	72	32%	35%	153	95%	50%	59	12%	-24%
South Korea	62***	-6%	82%	40	-53%	-19%	24	-70%	-63%	45	-37%	33%
Spain	645	23%	30%	657	4%	41%	604	11%	1%	671	9%	4%
Sweden	138	-31%	-9%	180	-7%	-12%	126	-35%	-10%	166	-18%	-5%
Switzerland	185	-6%	-5%	274	13%	11%	197	-4%	-24%	195	-30%	-27%
United Arab Emirates	89	-4%	11%	112	-14%	18%	100	-49%	-37%	74	-45%	-48%
USA	914	19%	10%	1,571	22%	-7%	1,818	26%	15%	1,313	31%	28%

International Passenger Survey by the ONS 2024P. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates. **SAR refers to Special Administrative Region. ***Caution: low sample size.



Selected Market Highlights Q3 and Q4 2024 (Spend)

Spend (£m)	Q1 2024	% change vs. Q1 2019	% change vs Q1 2023	Q2 2024	% change vs. Q2 2019	% change vs Q2 2023	Q3 2024	% change vs Q3 2019	% change vs Q3 2023	Q4 2024	% change vs Q4 2019	% change vs Q4 2023
Australia	£230	65%	25%	£362	8%	-13%	£685	65%	2%	£371	30%	13%
Austria	£35	-3%	6%	£52	33%	-24%	£82	52%	28%	£111	159%	42%
Belgium	£70	18%	-20%	£103	41%	-6%	£189	58%	15%	£124	17%	4%
Brazil	£76	19%	-31%	£74	57%	-18%	£87	-11%	-31%	£59	42%	-41%
Canada	£101	-25%	-42%	£313	43%	31%	£289	16%	-21%	£147	12%	-23%
China	£142	-35%	89%	£104	-73%	-39%	£261	-59%	-32%	£182	-61%	7%
Denmark	£55	9%	-31%	£105	10%	62%	£166	106%	27%	£96	-5%	11%
France	£381	45%	6%	£584	98%	48%	£445	5%	-6%	£497	18%	22%
Germany	£305	28%	32%	£584	38%	14%	£704	36%	8%	£434	12%	0%
GCC*	£569	15%	10%	£435	-4%	2%	£815	-8%	-2%	£399	-48%	-41%
Hong Kong (SAR)**	£86	-19%	27%	£46	-68%	-44%	£58	-71%	-54%	£37***	-67%	-65%
India	£148	40%	25%	£270	18%	17%	£228	-24%	-13%	£133	14%	-32%
Irish Republic	£253	21%	-24%	£242	12%	-20%	£260	25%	-17%	£280	-14%	-3%
Italy	£208	-12%	-5%	£246	8%	8%	£417	5%	43%	£198	-20%	-15%
Japan	£78	51%	36%	£72	-14%	32%	£28	-80%	-67%	£68	-26%	47%
Netherlands	£180	55%	5%	£327	70%	21%	£371	35%	-11%	£252	19%	-3%
New Zealand	£51	215%	25%	£97	194%	4%	£155	88%	0%	£59	49%	2%
Norway	£77	4%	-23%	£94	25%	-21%	£139	-5%	40%	£148	5%	15%
Poland	£94	12%	-7%	£119	11%	37%	£67	-54%	-50%	£106	-34%	-29%
Romania	£69	-36%	-3%	£57	-58%	3%	£85	-4%	-4%	£46	-57%	-43%
Saudi Arabia	£141	-6%	-11%	£150	19%	58%	£361	97%	41%	£136	-19%	-30%
South Korea	£49***	-6%	129%	£31	-66%	-65%	£29	-62%	-64%	£65	-1%	128%
Spain	£268	47%	41%	£346	33%	53%	£361	25%	11%	£327	33%	-1%
Sweden	£83	5%	10%	£106	5%	-19%	£77	-27%	-31%	£94	-20%	1%
Switzerland	£114	5%	-31%	£204	64%	23%	£151	-8%	-36%	£147	-15%	-21%
United Arab Emirates	£188	19%	31%	£146	-31%	-8%	£155	-44%	-51%	£129	-42%	-57%
USA	£869	27%	-6%	£1,763	42%	-14%	£2,653	97%	32%	£1,846	103%	44%

International Passenger Survey by the ONS 2024P. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated. Please note 2024 data is at the GB level whereas 2019 and 2023 is UK data. The ONS are not endorsing comparisons with previous years – see slide 2 for more information. GCC*: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and UAE. *SAR refers to Special Administrative Region. **Caution: low sample size.

3. Appendix & Survey Background

Sample size

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.

Time Period	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024
Overall Sample	7,438	7,698	12,451	13,639	41,266

Journey Purpose	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024
Holiday	2,503	3,008	5,305	5,184	16,000
VFR	2,448	2,121	3,915	4,557	13,041
Business	1,408	1,388	1,551	2,492	6,839
Study	69	76	196	186	527
Misc	536	553	576	726	2,391

Global Region	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024
Total Europe	4,858	4,259	7,537	9,439	26,093
→ EU Total	4,435	3,869	6,974	8,740	24,018
→ EU 15	3,687	3,270	6,283	7,884	21,124
→ Other EU	748	599	691	856	2,894
→ Rest of Europe	423	390	563	699	2,075
North America	1,252	1,939	2,848	2,330	8,369
Rest of World	1,328	1,500	2,066	1,870	6,764

Country of Residence	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024
Australia	210	303	501	384	1,398
Austria	63	52	89	142	346
Belgium	185	165	392	441	1,183
Brazil	80	64	104	100	348
Canada	187	249	364	283	1,083
China	82	84	98	91	355
Denmark	95	104	188	252	639
France	702	598	1,013	1,591	3,904
Germany	484	640	1,255	1,134	3,513
GCC*	211	160	290	260	921
Hong Kong (SAR)**	53	61	37	29	180
India	99	188	201	144	632
Irish Republic	681	450	1,049	1,409	3,589
Italy	313	234	456	546	1,549
Japan	59	40	43	85	227
Netherlands	350	388	816	857	2,411
New Zealand	50	55	108	57	270
Norway	126	80	181	223	610
Poland	294	248	217	268	1,027
Romania	159	117	63	136	475
Saudi Arabia	49	37	93	74	253
South Korea	26	35	47	59	167
Spain	446	336	628	842	2,252
Sweden	139	124	145	253	661
Switzerland	169	201	238	326	934
United Arab Emirates	89	80	115	89	373
USA	1,065	1,690	2,484	2,047	7,286

International Passenger Survey by the ONS 2024P. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates.

**SAR refers to Special Administrative Region.

About this data

The IPS data is based on interviews with a sample of departing visitors. The number interviewed varies but has typically been around 3,000 per month, but with the new methodology (harmonising with the CAA design), the sample size has increased from July 2024. 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

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.

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)

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
- **VFR** – visiting friends and/or relatives
- **YoY** - Year on Year
- **YTD** – year-to-date
- **2024P** – provisional 2024 data

For more information, please contact

Research@visitbritain.org