

Quarterly Inbound Update GB's Nations & Regions*

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:

- Confidence intervals are not available for inbound estimates to GB nations and regions for Q3 and Q4 2024.
- 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

GB nations and regions

Summary

Scotland led the recovery and reported record visits and spend in 2024; Wales showed YoY growth vs 2023 in spend and visits but remained behind pre-COVID levels. London slightly outpaced Rest of England. The majority of English regions saw lower spending than 2023, whilst for visits, most saw growth or slight declines vs 2023, and remained below 2019. These numbers are provisional and badged as 'official statistics in development' and we urge caution with trend analysis, especially for the second half of the year.

Visits:

- Visits to **London** showed a stronger recovery vs visits to the **Rest of England** 2024. Inbound visits to both regions were up vs 2023 but still lagged behind 2019 levels.
- In 2024, visits to most **England regions** were still down vs 2019, apart from East of England. YoY growth vs 2023 was mixed, with visits up from the East of England, South East, West Midlands, and East Midlands, and moderate declines in remaining regions.
- Inbound visits to **Scotland** for 2024 reached a new record and showed the strongest growth vs 2019 and 2023 out of all nations.
- Visits to **Wales** continued to grow and showed an increase vs 2023, but were still behind 2019 levels.

Spend (in nominal terms, when not adjusted for inflation):

- In 2024, inbound spend to **London** was up vs 2019 and 2023 whilst spend to the **Rest of England** exceeded pre-pandemic levels but fell just below 2023 levels.
- For spend across 2024, most **England regions** showed growth vs 2019, but North East, Yorkshire, and West Midlands lagged behind. When comparing to 2023, 5 regions (outside London) saw a decrease in spend apart from South East, East of England and South West.
- **Scotland** also led inbound spend recovery with a record spend in 2024. Spend was up by over half vs pre-COVID levels.
- Inbound spend to **Wales** just surpassed 2023 levels but was still below 2019 levels.

International Passenger Survey by the ONS 2024P. TOTAL GB figures do not the sum of each region as visitors may visit more than one nation/region. Please note caveats to data on slide 14. 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.

2. Latest Inbound GB Nations and Regions statistics

Provisional full year 2024

Regional volume headlines 2024

Visits (000)	2019	2023	2024	% change vs 2019	% change vs 2023
London	21,714	20,277	21,066	-3%	4%
Rest Of England	16,930	15,231	15,586	-8%	2%
North East	536	459	429	-20%	-6%
North West	3,441	3,417	3,380	-2%	-1%
Yorkshire	1,328	1,147	1,120	-16%	-2%
West Midlands	2,428	1,889	2,001	-18%	6%
East Midlands	1,202	1,083	1,091	-9%	1%
East Of England	2,266	2,209	2,387	5%	8%
South West	2,599	2,431	2,395	-8%	-1%
South East	5,396	4,312	4,603	-15%	7%
Scotland	3,457	3,987	4,377	27%	10%
Wales	1,027	892	931	-9%	4%
Total GB	40,857	37,959	39,214	-4%	3%

- Inbound visits to most nations and regions had not recovered to 2019 levels in 2024; however, growth was seen across the majority vs 2023.
- Visits to London showed a better recovery vs visits to the Rest of England. London received a little over half (54%). This is in line with the proportions of visits received prior to pre-COVID and 2023.
- The most visited England regions (excluding London) in 2024 were the South East (4.6m visits), the North West (3.4m visits), the South West (2.4m visits) and East of England (2.4m visits).
- The only region to see growth in inbound visits in England vs 2019 was East of England (+5%) which also saw the highest growth vs 2023, followed by South East and West Midlands.
- Scotland continues to lead recovery with a record 4.4m visits, up 27% vs 2019 and up 10% vs 2023
- Wales remained behind 2019 levels at -9%, although saw growth of 4% compared to 2023.

International Passenger Survey by the ONS 2024P. TOTAL GB figures do not the sum of each region as visitors may visit more than one nation/region. Please note caveats to data on slide 14. 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.

Regional value headlines 2024

Spend (£m)	2019	2023	2024	% change vs 2019	% change vs 2023
London	£15,700	£16,697	£16,913	8%	1%
Rest Of England	£9,051	£9,893	£9,429	4%	-5%
North East	£367	£360	£248	-32%	-31%
North West	£1,611	£2,155	£1,857	15%	-14%
Yorkshire	£637	£644	£511	-20%	-21%
West Midlands	£1,043	£1,058	£1,026	-2%	-3%
East Midlands	£461	£600	£535	16%	-11%
East Of England	£1,019	£1,116	£1,152	13%	3%
South West	£1,327	£1,464	£1,460	10%	0%
South East	£2,581	£2,477	£2,640	2%	7%
Scotland	£2,547	£3,593	£3,851	51%	7%
Wales	£515	£458	£463	-10%	1%
Total GB	£28,303	£30,917	£30,982	9%	0%

- While overall visits levels were 96% of that reported in 2019, inbound spend to the GB has recovered at a faster pace. *Please note these figures do not account for inflation. Total inflation from 2019 to 2024 was 24%, and for 2023 to 2024, it was 2.5%.*
- Visitors to London spent a record £16.9bn in the capital in 2024, up 8% on 2019 and up 1% vs 2023.
- Of the English regions (outside London), the South East (£2.6bn), the North West (£1.9bn) and the South West (£1.5bn) reported the largest value. South East and East of England set spend records in 2024.
- 6 England regions reported spend growth vs 2019, with North East, Yorkshire, and West Midlands still below pre-COVID levels. London, East of England, South West, and South East regions reported growth vs 2023.
- Inbound visitors to Scotland in 2024 spent a record £3.9bn, up 51% vs 2019 and up 7% vs 2023.
- Visitors to Wales spent £463 million in 2024, still below pre-COVID levels (-10%) but higher than in 2023 (+1%).

International Passenger Survey by the ONS 2024P. TOTAL GB figures do not the sum of each region as visitors may visit more than one nation/region. Please note caveats to data on slide 14. 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.

3. Latest quarters: Inbound Nations and Regions

Provisional Q3 & Q4 2024 (July to December)

Regional volume headlines Q3 and Q4 2024

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
London	4,836	6%	15%	5,591	4%	5%	5,381	-12%	-1%	5,258	-7%	-1%
Rest Of England	3,498	6%	13%	4,357	0%	12%	4,461	-16%	-5%	3,270	-18%	-8%
North East	107*	11%	78%	141*	-3%	21%	96	-47%	-48%	85	-25%	-12%
North West	823	19%	11%	1,007	10%	19%	840	-7%	-11%	710	-24%	-19%
Yorkshire	259	2%	6%	302	-1%	-1%	320	-29%	-9%	240	-25%	-3%
West Midlands	575	6%	38%	553	-10%	13%	484	-34%	-14%	389	-27%	-8%
East Midlands	237	-7%	4%	334	20%	22%	301	-16%	-13%	218	-30%	-7%
East Of England	498	17%	4%	519	-5%	-11%	760	1%	26%	610	12%	12%
South West	452	11%	28%	724	4%	18%	811	-20%	-14%	409	-16%	-21%
South East	879	-4%	13%	1,292	-10%	18%	1,508	-19%	3%	924	-21%	-5%
Scotland	617	39%	8%	1,358	49%	17%	1,327	5%	-8%	1,075	28%	33%
Wales	153	-2%	2%	292	-5%	15%	309	-19%	-12%	178	-4%	28%
Total GB	8,731	5%	14%	10,778	4%	9%	10,408	-12%	-5%	9,297	-10%	-2%

- After a strong start to the year at the total GB level, growth in inbound visits slowed in Q3 and Q4 2024 as GB saw declines vs 2019 and 2023 for both quarters (although please see slide 2 for interpretation of the second half of 2024).
- The Rest of England saw larger declines compared to London in the last two quarters of 2024.
- In Q3 and Q4 2024 declines in visits were seen across all regions compared to 2019 and 2023 apart from East of England.
- Scotland continued to see the strongest recovery in 2024 and although visits were slightly down YoY in Q3, Q4 saw a record 1.1m visits.
- Inbound visits to Wales remained below 2019 levels in Q3 and Q4 2024 and saw a moderate decline in Q3 vs 2023 but growth in Q4.

International Passenger Survey by the ONS 2024P. *Caution: low sample size. TOTAL GB figures do not the sum of each region as visitors may visit more than one nation/region. Please note caveats to data on slide 14. 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.

Regional value headlines Q3 and Q4 2024

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
London	£ 3,352	8%	0%	£ 4,078	10%	-4%	£5,108	14%	9%	£4,374	0%	0%
Rest Of England	£ 1,734	29%	-2%	£ 2,445	12%	5%	£3,202	-1%	-10%	£2,048	-10%	-8%
North East	£ 41*	5%	-37%	£82*	2%	12%	£53	-51%	-60%	£72	-48%	-17%
North West	£ 393	41%	5%	£ 538	19%	1%	£488	6%	-26%	£437	4%	-26%
Yorkshire	£ 107	34%	-19%	£ 110	6%	-30%	£174	-38%	-29%	£120	-31%	9%
West Midlands	£ 239	40%	25%	£ 243	30%	-10%	£266	-40%	-29%	£277	14%	27%
East Midlands	£ 88	17%	-34%	£ 140	19%	12%	£218	42%	-2%	£90	-22%	-26%
East Of England	£ 177	23%	-29%	£ 236	-12%	-4%	£433	18%	13%	£306	26%	30%
South West	£ 257	47%	26%	£ 422	20%	11%	£563	5%	-2%	£218	-17%	-29%
South East	£ 432	13%	5%	£ 674	7%	23%	£1,005	14%	5%	£529	-23%	-5%
Scotland	£ 321	52%	-9%	£ 1,170	65%	7%	£1,548	47%	3%	£812	41%	25%
Wales	£ 68	24%	2%	£ 134	1%	10%	£181	-10%	-10%	£80	-37%	19%
Total GB	£ 5,530	15%	-1%	£ 7,902	15%	0%	£10,153	11%	1%	£7,397	-2%	0%

- In line with visits, spend to London recovered at a faster rate compared to the Rest of England in the last two quarters of 2024. London exceeded both 2019 and 2023 levels in Q3 and remained on par with both years in Q4, whilst the Rest of England saw declines vs both years.
- It was a mixed picture for English regions in the last two quarters. Please note that quarterly spend data at the regional level can be volatile, and please see slide 2 for interpretation of the second half of 2024.
- Scotland led recovery throughout 2024, with record spend in Q3 and Q4 of £1.5bn and £812m, respectively. Inbound spend to Wales in Q3 was down on 2019 and 2023 at £181m, while spend remained below 2019 levels in Q4 by 37% but above 2023 levels by 19%.

International Passenger Survey by the ONS 2024P. TOTAL GB figures do not the sum of each region as visitors may visit more than one nation/region. Please note caveats to data on slide 14. 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. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated.

4. 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. Confidence intervals for regional estimates are not given for Q3 and Q4 2024 - please refer to the [ONS website](#) for information on confidence levels.

GB area	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024
London	3,508	3,516	5,753	7,045	19,822
Rest Of England	2,422	2,437	4,201	4,208	13,268
North East	65	84	154	190	493
North West	524	490	729	733	2,476
Yorkshire	167	151	368	357	1,043
West Midlands	441	355	609	698	2,103
East Midlands	164	165	307	283	919
East Of England	293	287	676	684	1,940
South West	316	416	805	620	2,157
South East	675	807	1,181	1,087	3,750
Scotland	387	622	1,681	1,314	4,004
Wales	152	197	371	354	1,074
Total GB	6,655	6,800	11,903	12,994	38,352

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:

- **Rest of England** – all England regions, excluding London

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

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