

# **Annual Inbound Update**

## **Total GB / UK**

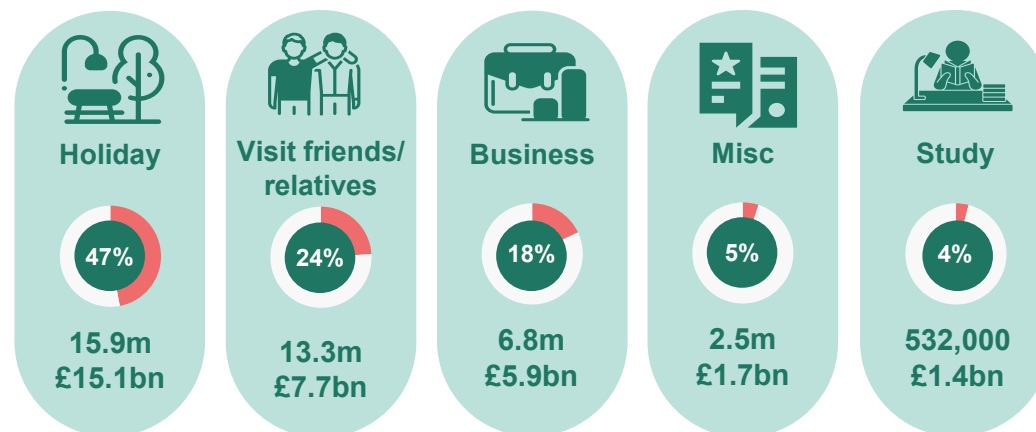
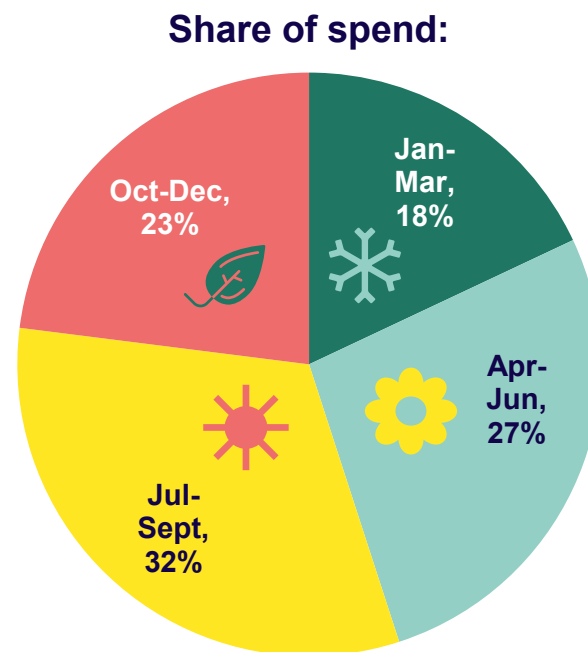
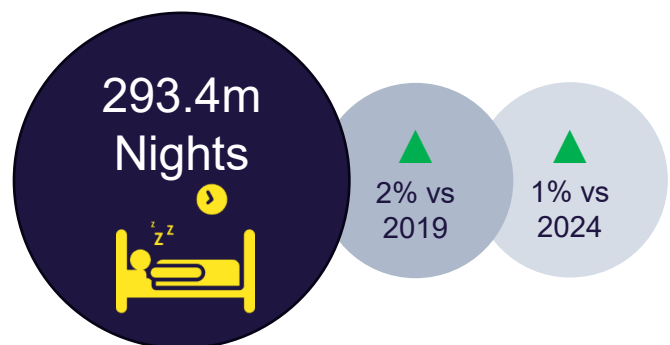
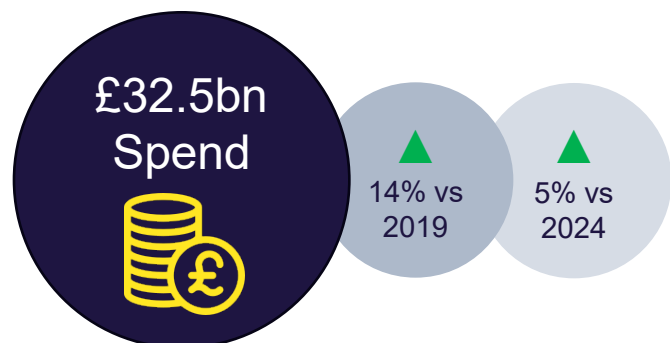
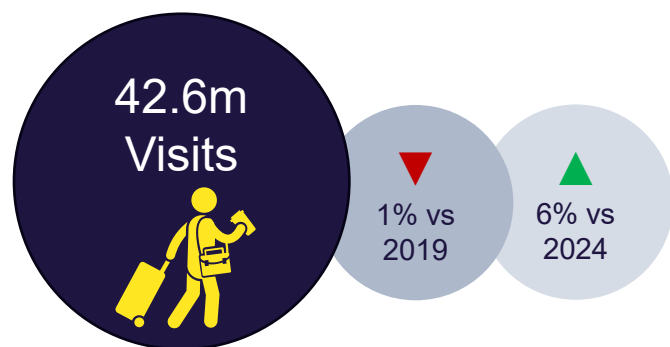
Final 2024 estimates

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

Published 26<sup>th</sup> August 2025



# Headline statistics for IPS 2024



Source: International Passenger Survey by the ONS. Total figures are ONS estimates for UK, quarter/purpose/market figures refer to GB. Growth figures are VB estimates and are not endorsed by ONS.

# Introduction (1)

This report is based on the **revised estimates** from the International Passenger Survey (IPS) data released by the Office for National Statistics (ONS) on the morning of **26<sup>th</sup> August 2025** covering **2024**. The report also contains VisitBritain modelled estimates for 2024 to allow comparability to previous years. See the latest IPS [data publication](#) and [update on improvements to the travel and tourism statistics](#) on the ONS website.

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

- 2024 final estimates are badged as '*official statistics in development*' and estimates are subject to future change as further improvements to the methods are introduced. The ONS are not endorsing comparisons with previous years.
- 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 from Dover to Calais in the IPS data as well as a notable decline in lorry drivers surveyed. This is more likely to impact business visitors, those visiting from Eastern Europe and some Western European markets, and those visiting Southern and Central England. 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 2024 data as '*official statistics in development*'. The ONS have noted this and are investigating the survey design and admin data used for calibration to better to understand this (point 5 in the [ONS update](#)).
- VisitBritain also notes the new incorporation of NISRA data into the UK estimates which is inconsistent with previous years (point 4 in the [ONS update](#)).
- To allow for UK comparability to previous years, VisitBritain have included modelled estimates for the 2024 UK data at the annual and quarterly level. See the next slide for more information.
- The ONS are also undertaking a review of the historical data, so previous years data may be subject to marginal change.

# Introduction (2)

Before reading the report, please note the following:

- **UK** estimates by the **ONS** include data from the new methodology introduced in Q3 2024 as published on the ONS website. UK data from the ONS is only available at the total annual level, not for any detail below this e.g. quarters, journey purpose, or markets.
- **UK** estimates from **VisitBritain modelling** have been provided to enable users to compare 2024 vs previous years. The estimates include data from the new IPS methodology introduced from Q3 2024, but for Dover and Calais, the data is inputted from Q3 and Q4 2023 data from the IPS (instead of the 2024 estimates) and for Northern Ireland, the IPS 2023 figure is used with the growth rate taken from NISRA for non-UK visitor overnight stays between 2023 and 2024 (which saw a slight decline). While these estimates include several assumptions, they address how inbound tourism performed in 2024 compared with previous years. However, please note they are not endorsed by the ONS, and they do not adjust for other methodological changes. UK data from the VisitBritain modelling is shown at the total inbound level for annual and quarterly data.
- **GB** estimates by the **ONS** have been published by quarter, journey purpose, global regions and markets. VisitBritain have included comparisons for 2024 GB level data vs 2019/2023 UK level data by quarter, journey purpose, global region and market, to allow for trend analysis. These comparisons are not endorsed by the ONS.



ONS estimates



VisitBritain modelled  
estimates for 2024



ONS estimates with  
VisitBritain  
comparisons

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4. [Appendix & survey background](#) - sample, about this data and definitions



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

\*data for 2024 is at the GB level



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



Make sure you get all the latest research and insights by [signing-up for VisitBritain's e-newsletter.](#)

# 1. Summary

Total UK and GB

# Summary

VisitBritain's modelled estimates suggest that inbound visits to the UK in 2024 were slightly below pre-COVID (2019) levels but higher than in 2023. Visitor spending was up compared to 2023 and 2019 in nominal terms, while real-terms spend remained below 2019 but above 2023.

## UK:

- Final IPS estimates for 2024 from the **ONS** indicate that there were 42.6m inbound visits to the UK in 2024 with those visitors spending a total of £32.5bn and staying for a total of 293m nights in the UK. We caution that these are statistics in development.
- **VisitBritain modelled estimates** (see slide 3 for more information) suggest that **visits** were just (1%) below pre-COVID levels and were up 6% vs 2023. Inbound visitor **spending** was up 14% vs 2019 and up 5% vs 2023. When adjusted for inflation (real terms), spend in 2024 was down 8% vs 2019 but up 2% vs 2023. **Nights** spent in the UK were just above 2019 and 2023 levels.

## GB:

- **VFR** visits saw record visits in 2024 whilst spend declined YoY, **holiday** visits grew YoY whilst spend was up 2% and **business** visits were still quite down vs 2019 but saw moderate growth vs 2023 (with spend above both above 2019 and 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 in visits and spend although there is much variation by market.
- **Visits** from USA, France and Germany led for volume in 2024 with alongside growing demand from 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 UK and GB statistics**

**Full year 2024**



# UK Volume and Value headlines and trip characteristics 2024

ONS estimates

| Total        | 2019 (UK) | 2023 (UK) | 2024 (UK) |
|--------------|-----------|-----------|-----------|
| Visits (000) | 40,857    | 37,959    | 42,562    |
| Spend (£m)   | £28,448   | £31,075   | £32,476   |
| Nights (000) | 289,628   | 292,870   | 293,368   |

| Trip characteristics (UK)     | 2024 (UK) |
|-------------------------------|-----------|
| Average Spend per Visit (£)   | £763      |
| Average Length of Stay (days) | 6.9       |
| Average Spend per Night (£)   | £111      |

- The ONS has published final estimates for the **UK** which are ‘*official statistics in development*’ and subject to further change as new methods are introduced. The ONS are not endorsing any comparisons to previous years.
- Final IPS estimates for 2024 from the ONS indicate that there were 42.6m inbound visits to the UK in 2024 with those visitors spending a total of £32.5bn and staying for a total of 293.4m nights in the UK. On average, an inbound visitor spent £763 per visit and £111 per night. The average duration of a visit was 6.9 nights in 2024.

*One of the main differences between the IPS UK estimates for 2024 and for previous years is that Northern Ireland data is now sourced from NISRA rather than the previous ONS operation in Northern Ireland. The numbers are higher in 2024. In 2023 the IPS reported 241,000 visits and £153m spend in Northern Ireland. The 2024 estimates are 3.5 million and £564m (see point 4 in the [ONS update](#) for more).*

International Passenger Survey by the ONS 2024. 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](#). The ONS are not endorsing comparisons with previous years – see slide 3 for more information.

# UK Volume and Value headlines 2024

VisitBritain modelled estimates for 2024

| Total VB modelled estimates | 2019 (UK) | 2023 (UK) | 2024 (UK) | % change vs 2019 | % change vs 2019 (in real terms) | % change vs 2023 | % change vs 2023 (in real terms) |
|-----------------------------|-----------|-----------|-----------|------------------|----------------------------------|------------------|----------------------------------|
| Visits (000)                | 40,857    | 37,959    | 40,036    | -1%              |                                  | 6%               |                                  |
| Spend (£m)                  | £28,448   | £31,075   | £32,478   | 14%              | -8%                              | 5%               | 2%                               |
| Nights (000)                | 289,628   | 292,870   | 296,226   | 2%               |                                  | 1%               |                                  |

- VisitBritain has modelled total UK 2024 estimates to enable comparability to previous years that impute 2023 ferry data and align Northern Ireland figures with historical methodology (see next slide). These estimates and comparisons are not official statistics and are not endorsed by the ONS.
- VisitBritain modelling estimates that under a comparable methodology there would have been 40.0m inbound **visits** to the UK in 2024. Visits were just below pre-COVID levels and were up 6% vs 2023.
- Under these estimates, inbound visitors **spent** £32.5bn in the UK during 2024, up 14% vs 2019 and up 5% vs 2023. When adjusted for inflation (real terms), spend in 2024 spend was down 8% vs 2019 but up 2% vs 2023.
- In total, 296.2m **nights** were spent in UK under these estimates, just above 2019 and 2023 nights.

International Passenger Survey by the ONS 2024 / VisitBritain modelled estimates for 2024. 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](#). The ONS are not endorsing comparisons with previous years – see slide 3 for more information.

# UK Trip characteristics 2024

VisitBritain modelled  
estimates for 2024

| Trip characteristics<br>VB modelled estimates | 2024 (UK) | % change vs 2019 | % change vs 2019<br>(in real terms) | % change vs 2023 | % change vs 2023<br>(in real terms) |
|-----------------------------------------------|-----------|------------------|-------------------------------------|------------------|-------------------------------------|
| Average Spend per Visit (£)                   | £806      | 16%              | -7%                                 | -2%              | -4%                                 |
| Average Length of Stay (days)                 | 7.3       | 4%               |                                     | -5%              |                                     |
| Average Spend per Night (£)                   | £110      | 12%              | -10%                                | 3%               | 1%                                  |

- VisitBritain has calculated trip characteristics based off modelled total UK estimates for 2024. These estimates and comparisons are not endorsed by the ONS. Under these estimates:
- The **average spend per visit** by inbound visitors to the UK was £806 in 2024, up 16% vs 2019 and but just below 2023. In real terms, average spend was down 7% vs 2019 and down 4% vs 2023.
- The **average length of stay** by an inbound visitor was 7.3 nights, 4% higher than 2019 but 5% down vs 2023.
- **Average spend per night** was £110 across the year, up 12% vs 2019 and up 3% vs 2023. In real terms, spend per night was down 10% vs 2019 and up 1% vs 2023.

International Passenger Survey by the ONS 2024 / VisitBritain modelled estimates for 2024. 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](#). The ONS are not endorsing comparisons with previous years – see slide 3 for more information.

# GB Volume and Value headlines 2024

ONS estimates

| Total        | 2024 (GB) |
|--------------|-----------|
| Visits (000) | 39,031    |
| Spend (£m)   | £31,912   |
| Nights (000) | 287,842   |

| Trip characteristics (GB)     | 2024 (GB) |
|-------------------------------|-----------|
| Average Spend per Visit (£)   | £818      |
| Average Length of Stay (days) | 7.4       |
| Average Spend per Night (£)   | £111      |

- The ONS has published final estimates for **GB** which are '*official statistics in development*' and subject to further change as new methods are introduced. The ONS are not endorsing any comparisons to previous years. GB data is not available for previous years.
- Final IPS estimates for 2024 from the ONS indicate that there were 39.0m inbound **visits** to the UK in 2024 with those visitors **spending** a total of £31.9bn and 287.8m **nights** in the UK. On average, an inbound visitor **spent** £818 **per visit** and £111 **per night**. The **average duration** of a visit was 7.4 nights in 2024.

International Passenger Survey by the ONS 2024. 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 3 for more information.

# Journey Purpose 2024 (Visits)

| Visits (000)                   | 2019 (UK) | 2023 (UK) | 2024 (GB) | % change vs 2019 | % change vs 2023 |
|--------------------------------|-----------|-----------|-----------|------------------|------------------|
| Holiday                        | 16,905    | 15,883    | 15,925    | -6%              | 0%               |
| VFR                            | 12,427    | 12,848    | 13,286    | 7%               | 3%               |
| *Business                      | 8,670     | 6,476     | 6,771     | -22%             | 5%               |
| Study                          | 600       | 404       | 532       | -11%             | 32%              |
| Miscellaneous<br>(Excl. study) | 2,256     | 2,349     | 2,518     | 12%              | 10%              |

- There were 15.9m **holiday** visits in GB in 2024, down 6% vs 2019 and on par with 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 3% vs 2023. They accounted for 34% of all visits, still higher than 2019 levels when they had 30% share.
- Accounting for 17% of all visits in 2024, **\*business** visits totalled at 6.8m visits, trailing 2019 levels by 22% but showing YoY growth, up 5% vs 2023.
- **Study** visits were still behind 2019 levels by 11% but up 32% vs 2023, totalling at 532,000 visits.
- Remaining visits under '**miscellaneous**' reached 2.5m in 2024, up vs both comparison years.

International Passenger Survey by the ONS 2024. 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 3 for more information. Visits from same-day transit visitors is excluded above. \*The change in methodology at Dover-Calais from Q3 2024 is more likely to negatively impact estimates for inbound business visits in 2024.

# Journey Purpose 2024 (Spend)

| Spend (£m)                     | 2019 (UK) | 2023 (UK) | 2024 (GB) | % change vs 2019 | % change vs 2023 |
|--------------------------------|-----------|-----------|-----------|------------------|------------------|
| Holiday                        | £13,341   | £14,879   | £15,143   | 14%              | 2%               |
| VFR                            | £6,408    | £8,143    | £7,696    | 20%              | -5%              |
| *Business                      | £5,823    | £5,241    | £5,871    | 1%               | 12%              |
| Study                          | £1,442    | £1,158    | £1,370    | -5%              | 18%              |
| Miscellaneous<br>(Excl. study) | £1,394    | £1,586    | £1,747    | 25%              | 10%              |

- **Holiday** spend in GB totalled at a record £15.1bn, up 14% vs 2019 and up 2% vs 2023. Holiday spend made up 47% of total spend.
- Spend from those **visiting friends and relatives** declined slightly vs 2023 at -5%, but remained well above 2019 levels, reaching £7.7bn. VFR spend made up 24% of spend, lower than the previous year but still ahead of the 2019 share.
- **\*Business** visitor spend was similar to 2019 levels and saw 12% YoY growth at £5.9bn.
- **Study** spend saw YoY growth to £1.4bn, up 18% vs 2023, but remained below 2019 levels (-5%).
- Remaining spend came from '**miscellaneous**' visits which were up vs 2019 and 2023 levels.

International Passenger Survey by the ONS 2024. 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 3 for more information. Spend from transit visitors is excluded above. \*The change in methodology at Dover-Calais from Q3 2024 is more likely to negatively impact estimates for inbound business visits in 2024.

# Global Regions 2024 (Visits)

| Visits (000)     | 2019 (UK) | 2023 (UK) | 2024 (GB) | % change vs 2019 | % change vs 2023 |
|------------------|-----------|-----------|-----------|------------------|------------------|
| Total Europe     | 27,293    | 24,826    | 25,852    | -5%              | 4%               |
| → EU Total       | 24,828    | 22,499    | 23,671    | -5%              | 5%               |
| → EU 15          | 20,328    | 18,472    | 19,894    | -2%              | 8%               |
| → Other EU       | 4,500     | 4,026     | 3,777     | -16%             | -6%              |
| → Rest of Europe | 2,465     | 2,327     | 2,181     | -12%             | -6%              |
| North America    | 5,373     | 6,125     | 6,529     | 22%              | 7%               |
| Rest of World    | 8,191     | 7,009     | 6,649     | -19%             | -5%              |

- Inbound visits from **\*Europe** totalled 25.9m in 2024, up 4% 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 vs both 2019 and 2023.
- **North America** visits reached a record 6.5m, up 22% vs 2019 and up 7% vs 2023.
- Remaining visits from the **Rest of World** reached 6.6m, although there is much variation by market which you can see on the next slides.

# Global Regions 2024 (Spend)

| Spend (£m)       | 2019 (UK) | 2023 (UK) | 2024 (GB) | % change vs 2019 | % change vs 2023 |
|------------------|-----------|-----------|-----------|------------------|------------------|
| Total Europe     | £12,407   | £13,430   | £14,396   | 16%              | 7%               |
| → EU Total       | £10,661   | £11,504   | £12,523   | 17%              | 9%               |
| → EU 15          | £8,733    | £10,026   | £11,109   | 27%              | 11%              |
| → Other EU       | £1,928    | £1,478    | £1,414    | -27%             | -4%              |
| → Rest of Europe | £1,746    | £1,926    | £1,873    | 7%               | -3%              |
| North America    | £4,918    | £7,227    | £8,154    | 66%              | 13%              |
| Rest of World    | £11,123   | £10,417   | £9,362    | -16%             | -10%             |

- Inbound spend from **\*Europe** totalled a record £14.4bn in 2024, up 7% vs 2023 and up 16% vs 2019. As with visits, a similar pattern was seen for spend from the EU. The Rest of Europe saw spend above 2019 levels but just below 2023 levels.
- **North America** spend reached a record £8.2bn, up 66% vs 2019 and up 13% vs 2023.
- Visits from the **Rest of World** reached £9.4bn, down 16% vs 2019 and down 10% vs 2023. Please see market variation on the next slides.

International Passenger Survey by the ONS 2024. 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 3 for more information. \*The change in methodology at Dover-Calais from Q3 2024 is more likely to negatively impact inbound European estimates in 2024.



# Selected Market 2024 (Visits)

| Visits (000)         | 2024 (GB) | % change vs 2019 | % change vs 2023 |
|----------------------|-----------|------------------|------------------|
| Australia            | 1,227     | 15%              | 5%               |
| Austria              | 352       | 3%               | 5%               |
| Belgium              | 873       | -23%             | 1%               |
| Brazil               | 310       | 7%               | -10%             |
| Canada               | 944       | 8%               | -6%              |
| China                | 463       | -48%             | 26%              |
| Denmark              | 659       | -5%              | 5%               |
| France               | 3,611     | 1%               | 14%              |
| Germany              | 3,342     | 3%               | 13%              |
| GCC*                 | 1,036     | -14%             | -4%              |
| Hong Kong (SAR)**    | 170       | -58%             | -34%             |
| India                | 603       | -13%             | 0%               |
| Irish Republic       | 2,938     | 3%               | 2%               |
| Italy                | 1,871     | -15%             | 10%              |
| Japan                | 226       | -42%             | 0%               |
| Netherlands          | 1,968     | -1%              | 0%               |
| New Zealand          | 293       | 56%              | 10%              |
| Norway               | 623       | -4%              | 4%               |
| Poland               | 1,452     | -12%             | -11%             |
| Romania              | 706       | -22%             | -12%             |
| Saudi Arabia         | 344       | 56%              | 20%              |
| South Korea          | 169       | -44%             | -7%              |
| Spain                | 2,559     | 10%              | 16%              |
| Sweden               | 614       | -22%             | -9%              |
| Switzerland          | 850       | -8%              | -12%             |
| United Arab Emirates | 374       | -32%             | -22%             |
| USA                  | 5,585     | 24%              | 9%               |

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 visits 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 (26%), Saudi Arabia (20%), Spain (16%), France (14%) and Germany (13%).
- **Largest declines in 2024 vs 2023:** Hong Kong SAR (-34%), UAE (-22%), Romania (-12%), Switzerland (-12%) and Poland (-11%).
- **Strongest growth in 2024 vs 2019:** Saudi Arabia (56%), New Zealand (56%), USA (24%), Australia (15%) and Spain (10%).
- **Largest declines in 2024 vs 2019:** Hong Kong SAR (-58%), China (-48%), South Korea (-44%), Japan (-42%) and UAE (-32%).

International Passenger Survey by the ONS 2024. 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 3 for more information. GCC\* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates. \*\*SAR refers to Special Administrative Region. The change in methodology at Dover-Calais from Q3 2024 is more likely to negatively impact inbound estimates from Eastern Europe and some Western European markets in 2024.

# Selected Market 2024 (Spend)

| Spend (£m)           | 2024 (GB) | % change vs 2019 | % change vs 2023 |
|----------------------|-----------|------------------|------------------|
| Australia            | £1,665    | 42%              | 4%               |
| Austria              | £287      | 67%              | 18%              |
| Belgium              | £505      | 41%              | 5%               |
| Brazil               | £309      | 24%              | -27%             |
| Canada               | £891      | 21%              | -8%              |
| China                | £724      | -58%             | -9%              |
| Denmark              | £431      | 31%              | 19%              |
| France               | £1,971    | 41%              | 21%              |
| Germany              | £2,092    | 33%              | 14%              |
| GCC*                 | £2,221    | -15%             | -9%              |
| Hong Kong (SAR)**    | £255      | -54%             | -33%             |
| India                | £806      | 7%               | 0%               |
| Irish Republic       | £1,046    | 9%               | -15%             |
| Italy                | £1,100    | -1%              | 13%              |
| Japan                | £247      | -33%             | 2%               |
| Netherlands          | £1,170    | 47%              | 5%               |
| New Zealand          | £375      | 119%             | 8%               |
| Norway               | £471      | 8%               | 6%               |
| Poland               | £390      | -22%             | -17%             |
| Romania              | £259      | -41%             | -12%             |
| Saudi Arabia         | £771      | 23%              | 9%               |
| South Korea          | £178      | -37%             | -18%             |
| Spain                | 1,365     | 40%              | 28%              |
| Sweden               | £400      | 0%               | -2%              |
| Switzerland          | £643      | 13%              | -15%             |
| United Arab Emirates | £613      | -29%             | -33%             |
| USA                  | £7,264    | 74%              | 16%              |

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, India, Netherlands, New Zealand, Spain and the USA.
- **Strongest growth in 2024 vs 2023:** Spain (28%), France (21%), Denmark (19%), Austria (18%) and USA (16%).
- **Largest declines in 2024 vs 2023:** UAE (-33%), Hong Kong SAR (-33%), Brazil (-27%), South Korea (-18%), Poland (-17%), Switzerland (-15%) and Irish Republic (-15%).
- **Strongest growth in 2024 vs 2019:** New Zealand (119%), USA (74%), Austria (67%), Netherlands (47%) and Australia (42%).
- **Largest declines in 2024 vs 2019:** China (-58%), Hong Kong SAR (-54%), Romania (-41%), South Korea (-37%) and Japan (-33%).

International Passenger Survey by the ONS 2024. 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 3 for more information. GCC\* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates. \*\*SAR refers to Special Administrative Region. The change in methodology at Dover-Calais from Q3 2024 is more likely to negatively impact inbound estimates from Eastern Europe and some Western European markets in 2024.

# **3. Latest inbound GB statistics**

**Quarterly 2024**

# UK Quarterly 2024 volume and value headlines

VisitBritain modelled estimates for 2024

| Total VB modelled estimates | Q1 2024 (UK) | % change vs Q1 2019 | % change vs Q1 2023 | Q2 2024 (UK) | % change vs Q2 2019 | % change vs Q2 2023 | Q3 2024 (UK) | % change vs Q3 2019 | % change vs Q3 2023 | Q4 2024 (UK) | % change vs Q4 2019 | % change vs Q4 2023 |
|-----------------------------|--------------|---------------------|---------------------|--------------|---------------------|---------------------|--------------|---------------------|---------------------|--------------|---------------------|---------------------|
| Visits (000)                | 8,588        | 3%                  | 12%                 | 10,888       | 5%                  | 10%                 | 11,135       | -6%                 | 2%                  | 9,695        | -6%                 | 3%                  |
| Spend (£m)                  | 5,686        | 18%                 | 1%                  | 8,809        | 28%                 | 11%                 | 10,497       | 14%                 | 4%                  | 7,486        | -1%                 | 1%                  |
| Nights (000)                | 57,629       | 14%                 | 4%                  | 77,149       | 11%                 | 6%                  | 95,604       | -7%                 | -4%                 | 65,844       | -2%                 | 2%                  |

- VisitBritain have modelled estimates to enable comparability to previous years for each quarter. See slide 3 for more information.
- VisitBritain estimates suggest **visits** to the UK grew YoY across all quarters. The first half of the year was higher than pre-COVID levels but the second half year was still slightly behind.
- Visitor spend to the UK surpassed 2019 levels in nominal terms, apart from Q1 which was slightly behind, whilst all quarters saw YoY growth.
- Nights were higher than 2019 and 2023 in the first half of the year but dropped in the third quarter. Q4 saw moderate YoY growth.

International Passenger Survey by the ONS 2024 / VisitBritain modelled estimates for 2024. 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 3 for more information.

# UK Trip characteristics – Quarterly 2024

VisitBritain modelled estimates for 2024

| Trip characteristics<br>VB modelled estimates | Q1<br>2024<br>(UK) | %<br>change<br>vs Q1<br>2019 | %<br>change<br>vs Q1<br>2023 | Q2<br>2024<br>(UK) | %<br>change<br>vs Q2<br>2019 | %<br>change<br>vs Q2<br>2023 | Q3<br>2024<br>(UK) | %<br>change<br>vs Q3<br>2019 | %<br>change<br>vs Q3<br>2023 | Q4<br>2024<br>(UK) | %<br>change<br>vs Q4<br>2019 | %<br>change<br>vs Q4<br>2023 |
|-----------------------------------------------|--------------------|------------------------------|------------------------------|--------------------|------------------------------|------------------------------|--------------------|------------------------------|------------------------------|--------------------|------------------------------|------------------------------|
| Average Spend per Visit (£)                   | £662               | 15%                          | -9%                          | £809               | 22%                          | 1%                           | £943               | 22%                          | 2%                           | £772               | 5%                           | -2%                          |
| Average Length of Stay (days)                 | 6.7                | 10%                          | -7%                          | 7.1                | 6%                           | -4%                          | 8.6                | -1%                          | -6%                          | 6.8                | 4%                           | -1%                          |
| Average Spend per Night (£)                   | £99                | 4%                           | -3%                          | £114               | 15%                          | 5%                           | £110               | 23%                          | 8%                           | £114               | 1%                           | -1%                          |

- VisitBritain has estimated trip characteristics based off modelled total **UK** estimates. These estimates are not endorsed by the ONS.
- On **average, visitors spent** the most in Q3 summer at £943 per visit. Average spend was higher than 2023 in Q2 and Q3 but down in Q1 and Q4.
- **Average length of stay** continued to slightly decrease YoY across all quarters. Length of stay also remained higher than pre-COVID levels across all quarters apart from Q3 when it was slightly lower.
- **Average spend per night** saw a peak in Q2 and Q4 at £114. Year-on-year, average spend per night saw moderate increases in Q2 and Q3 but decreases in Q1 and Q4.

International Passenger Survey by the ONS 2024 / VisitBritain modelled estimates for 2024. 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 3 for more information.

# Quarterly 2024 volume and value headlines

ONS estimates

| Total        | Q1 2024<br>(GB) | Q2 2024<br>(GB) | Q3 2024<br>(GB) | Q4 2024<br>(GB) |
|--------------|-----------------|-----------------|-----------------|-----------------|
| Visits (000) | 8,563           | 10,833          | 10,390          | 9,245           |
| Spend (£m)   | £5,669          | £8,772          | £10,123         | £7,349          |
| Nights (000) | 57,481          | 76,765          | 90,250          | 63,345          |

| Total                         | Q1 2024<br>(GB) | Q2 2024<br>(GB) | Q3 2024<br>(GB) | Q4 2024<br>(GB) |
|-------------------------------|-----------------|-----------------|-----------------|-----------------|
| Average Spend per Visit (£)   | £662            | £810            | £974            | £795            |
| Average Length of Stay (days) | 6.7             | 7.1             | 8.7             | 6.9             |
| Average Spend per Night (£)   | £99             | £114            | £112            | £116            |

- The ONS has published final estimates for **GB** which are '*official statistics in development*' and subject to further change as new methods are introduced. The ONS are not endorsing any comparisons to previous years.
- Final IPS estimates for 2024 from the ONS indicate that Q3 2024 saw the largest volume of inbound **visits** to GB at 10.8m visits. However, the highest **spend** was in the summer peak, Q3, at £10.1bn and where visitor also spent the largest number of **nights** at 90.3m. On average, inbound visitors to GB **spent the most on average** in Q3 at £974 per visit, which was also the quarter which saw the longest **length of stay** (8.7 nights). However, the highest **spend per night** was seen in Q4 at £116.

International Passenger Survey by the ONS 2024. 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 3 for more information.

# Journey Purpose - Quarterly 2024 visits

| Visits (000) | Q1 2024<br>(GB) | %<br>change<br>vs Q1<br>2019 | %<br>change<br>vs Q1<br>2023 | Q2 2024<br>(GB) | %<br>change<br>vs Q2<br>2019 | %<br>change<br>vs Q2<br>2023 | Q3 2024<br>(GB) | %<br>change<br>vs Q3<br>2019 | %<br>change<br>vs Q3<br>2023 | Q4 2024<br>(GB) | %<br>change<br>vs Q4<br>2019 | %<br>change<br>vs Q4<br>2023 |
|--------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|
| Holiday      | 3,237           | 9%                           | 17%                          | 4,527           | 0%                           | 3%                           | 4,447           | -17%                         | -10%                         | 3,714           | -9%                          | -1%                          |
| VFR          | 2,953           | 11%                          | 4%                           | 3,305           | 10%                          | 6%                           | 3,734           | 9%                           | 4%                           | 3,294           | -1%                          | 0%                           |
| *Business    | 1,709           | -20%                         | 21%                          | 2,067           | -6%                          | 22%                          | 1,445           | -33%                         | -9%                          | 1,549           | -30%                         | -13%                         |
| Study        | 77              | -4%                          | 4%                           | 132             | -13%                         | 49%                          | 216             | -4%                          | 43%                          | 106             | -25%                         | 19%                          |
| Misc.        | 587             | 19%                          | 2%                           | 802             | 54%                          | 33%                          | 547             | -20%                         | -13%                         | 581             | 5%                           | 8%                           |

- After seeing YoY growth in the first half of the year (with record Q1 visits), **holiday** visits dipped in the second half of the year when compared to both 2019 and 2023 levels. Overall, holiday visits were just behind 2019 and on par with 2023.
- **Visits to friends and relatives** show record visits across the first three quarters of the year. Q4 visits were on par with 2023 and just below 2019 levels.
- **\*Business** visits grew YoY for the first half of the year but saw a weaker Q3 and Q4. They were still behind pre-COVID levels overall by around one fifth but saw moderate YoY growth.
- **Study** visits tend to fluctuate but saw YoY growth in each quarter with a strong Q3 and Q4. Overall, visits were still behind pre-COVID levels.
- Remaining visits under '**miscellaneous**' saw YoY increases across Q1, Q2 and Q4.

International Passenger Survey by the ONS 2024. 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 3 for more information. Visits from transit visitors is excluded above. \*The change in methodology at Dover-Calais from Q3 2024 is more likely to negatively impact estimates for inbound business visits in 2024.



# Journey Purpose - Quarterly 2024 spend

| Spend (£m) | Q1 2024<br>(GB) | %<br>change<br>vs Q1<br>2019 | %<br>change<br>vs Q1<br>2023 | Q2 2024<br>(GB) | %<br>change<br>vs Q2<br>2019 | %<br>change<br>vs Q2<br>2023 | Q3 2024<br>(GB) | %<br>change<br>vs Q3<br>2019 | %<br>change<br>vs Q3<br>2023 | Q4 2024<br>(GB) | %<br>change<br>vs Q4<br>2019 | %<br>change<br>vs Q4<br>2023 |
|------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|
| Holiday    | £2,411          | 16%                          | 14%                          | £4,077          | 25%                          | -1%                          | £5,275          | 12%                          | -2%                          | £3,380          | 3%                           | 3%                           |
| VFR        | £1,564          | 34%                          | -6%                          | £2,038          | 30%                          | 7%                           | £2,522          | 25%                          | 2%                           | £1,572          | -5%                          | -25%                         |
| *Business  | £1,169          | -2%                          | 4%                           | £1,748          | 18%                          | 38%                          | £1,369          | -9%                          | -5%                          | £1,584          | -3%                          | 12%                          |
| Study      | £184            | 59%                          | -35%                         | £295            | 7%                           | 30%                          | £513            | -3%                          | 22%                          | £379            | -28%                         | 64%                          |
| Misc.      | £238            | 32%                          | -21%                         | £597            | 109%                         | 57%                          | £406            | 3%                           | 2%                           | £417            | -10%                         | 6%                           |

- **Holiday** spend saw strong YoY growth in Q1 and similar levels of spend to 2023 in the remaining quarters. Spend surpassed 2019 levels in nominal terms. Record spend was seen in Q1 and Q4.
- Spend from **visiting friends and relatives** saw a slight YoY dip in Q1 and moderate growth in Q2 (a record) and Q3. However, spend in Q4 saw a large decrease, down 25%. Spend remained above 2019 levels from Q1 to Q3 but saw a slight dip in Q4.
- **\*Business** spend saw varying levels of growth across quarters with Q2 (a record) seeing the largest YoY growth, moderate growth in Q1 and Q4 and a slight decline in Q3. Overall spend surpassed 2019 and 2023 levels in nominal terms.
- Spend from **study** visits can fluctuate – spend saw large YoY growth from Q2 to Q4 but overall spend was still down on 2019 levels.
- All other spend under '**miscellaneous**' saw YoY growth from Q2 to Q4.

International Passenger Survey by the ONS 2024. 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 3 for more information. Spend from transit visitors is excluded above. \*The change in methodology at Dover-Calais from Q3 2024 is more likely to negatively impact estimates for inbound business visits in 2024.



# Global Regions - Quarterly 2024 visits

| Visits (000)     | Q1 2024<br>(GB) | %<br>change<br>vs Q1<br>2019 | %<br>change<br>vs Q1<br>2023 | Q2 2024<br>(GB) | %<br>change<br>vs Q2<br>2019 | %<br>change<br>vs Q2<br>2023 | Q3 2024<br>(GB) | %<br>change<br>vs Q3<br>2019 | %<br>change<br>vs Q3<br>2023 | Q4 2024<br>(GB) | %<br>change<br>vs Q4<br>2019 | %<br>change<br>vs Q4<br>2023 |
|------------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|
| Total Europe     | 6,109           | 1%                           | 12%                          | 7,100           | 3%                           | 13%                          | 6,279           | -12%                         | -5%                          | 6,365           | -12%                         | -2%                          |
| → EU Total       | 5,593           | 1%                           | 13%                          | 6,442           | 3%                           | 14%                          | 5,755           | -12%                         | -4%                          | 5,881           | -10%                         | 0%                           |
| → EU 15          | 4,442           | 0%                           | 12%                          | 5,361           | 3%                           | 14%                          | 5,012           | -7%                          | 1%                           | 5,080           | -4%                          | 5%                           |
| → Other EU       | 1,151           | 6%                           | 14%                          | 1,081           | 0%                           | 11%                          | 742             | -34%                         | -27%                         | 802             | -34%                         | -21%                         |
| → Rest of Europe | 516             | 3%                           | 3%                           | 658             | 8%                           | 12%                          | 524             | -19%                         | -13%                         | 484             | -32%                         | -25%                         |
| North America    | 1,036           | 15%                          | 4%                           | 1,902           | 24%                          | -3%                          | 2,125           | 22%                          | 10%                          | 1,466           | 23%                          | 18%                          |
| Rest of World    | 1,419           | 2%                           | 16%                          | 1,831           | -6%                          | 8%                           | 1,986           | -33%                         | -17%                         | 1,414           | -25%                         | -16%                         |

- Inbound visits from **\*Europe** just surpassed pre-pandemic levels in the first half of the year and saw strong YoY growth. However, visits from the region dipped back below 2019 and 2023 levels in the second half of the year.
- **North America** visits remained above 2019 levels across all quarters. YoY growth was seen across all quarters apart from a slight decline in Q2. Record visits were seen in Q1 and Q4.
- There is much variation within the **Rest of World** so please see market breakdowns on the next slides.

International Passenger Survey by the ONS 2024. 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 3 for more information. \*The change in methodology at Dover-Calais from Q3 2024 is more likely to negatively impact inbound estimates from Eastern Europe and some Western European markets in 2024.

# Global Regions - Quarterly 2024 spend

| Spend (£m)              | Q1 2024<br>(GB) | %<br>change<br>vs Q1<br>2019 | %<br>change<br>vs Q1<br>2023 | Q2 2024<br>(GB) | %<br>change<br>vs Q2<br>2019 | %<br>change<br>vs Q2<br>2023 | Q3 2024<br>(GB) | %<br>change<br>vs Q3<br>2019 | %<br>change<br>vs Q3<br>2023 | Q4 2024<br>(GB) | %<br>change<br>vs Q4<br>2019 | %<br>change<br>vs Q4<br>2023 |
|-------------------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|-----------------|------------------------------|------------------------------|
| <b>Total Europe</b>     | £2,727          | 22%                          | 3%                           | £4,115          | 39%                          | 27%                          | £4,185          | 13%                          | 2%                           | £3,369          | -4%                          | -3%                          |
| → <b>EU Total</b>       | £2,386          | 23%                          | 6%                           | £3,553          | 39%                          | 29%                          | £3,634          | 15%                          | 3%                           | £2,950          | -1%                          | -1%                          |
| → <b>EU 15</b>          | £2,039          | 27%                          | 5%                           | £3,185          | 53%                          | 30%                          | £3,260          | 24%                          | 5%                           | £2,626          | 8%                           | 3%                           |
| → <b>Other EU</b>       | £347            | 2%                           | 14%                          | £368            | -23%                         | 20%                          | £374            | -32%                         | -16%                         | £325            | -42%                         | -23%                         |
| → <b>Rest of Europe</b> | £341            | 18%                          | -16%                         | £562            | 40%                          | 18%                          | £552            | 1%                           | 0%                           | £419            | -18%                         | -15%                         |
| <b>North America</b>    | £984            | 20%                          | -10%                         | £2,268          | 55%                          | -1%                          | £2,918          | 83%                          | 23%                          | £1,984          | 91%                          | 35%                          |
| <b>Rest of World</b>    | £1,958          | 12%                          | 4%                           | £2,389          | -3%                          | 0%                           | £3,020          | -22%                         | -17%                         | £1,995          | -34%                         | -20%                         |

- Visitor spend from \***Europe** saw record spend across the first three quarters of the year. Q4 was below both 2019 and 2023 spend.
- **North America** spend was way above 2019 levels and saw large YoY growth in Q3 and Q4. Record spend was seen for both Q3 and Q4 2024.
- Remaining spend came from the **Rest of World** where there is much variation by market – please see next slides.

International Passenger Survey by the ONS 2024. 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 3 for more information. \*The change in methodology at Dover-Calais from Q3 2024 is more likely to negatively impact inbound estimates from Eastern Europe and some Western European markets in 2024.

# Selected markets - Quarterly 2024 visits

| Visits (000)         | Q1 2024<br>(GB) | % change<br>vs. Q1 2019 | % change<br>vs Q1 2023 | Q2 2024<br>(GB) | % change<br>vs. Q2 2019 | % change<br>vs Q2 2023 | Q3 2024<br>(GB) | % change<br>vs Q3 2019 | % change<br>vs Q3 2023 | Q4 2024<br>(GB) | % change<br>vs Q4 2019 | % change<br>vs Q4 2023 |
|----------------------|-----------------|-------------------------|------------------------|-----------------|-------------------------|------------------------|-----------------|------------------------|------------------------|-----------------|------------------------|------------------------|
| Australia            | 184             | 32%                     | 19%                    | 307             | 14%                     | -1%                    | 467             | 11%                    | 3%                     | 269             | 15%                    | 7%                     |
| Austria              | 76              | -6%                     | 24%                    | 81              | -4%                     | -3%                    | 86              | 1%                     | -9%                    | 109             | 19%                    | 12%                    |
| Belgium              | 191             | -19%                    | -4%                    | 212             | -29%                    | -6%                    | 258             | -16%                   | 9%                     | 212             | -27%                   | 3%                     |
| Brazil               | 86              | 17%                     | -7%                    | 86              | 41%                     | 4%                     | 80              | -13%                   | -7%                    | 58              | -10%                   | -30%                   |
| Canada               | 155             | 18%                     | -6%                    | 318             | 26%                     | 19%                    | 312             | 4%                     | -11%                   | 159             | -15%                   | -27%                   |
| China                | 96              | -19%                    | 471%                   | 100             | -51%                    | 40%                    | 152             | -61%                   | -14%                   | 114             | -33%                   | 10%                    |
| Denmark              | 113             | -4%                     | -24%                   | 190             | 2%                      | 43%                    | 178             | -5%                    | -4%                    | 178             | -11%                   | 11%                    |
| France               | 866             | 6%                      | 29%                    | 1,020           | 10%                     | 25%                    | 764             | -15%                   | -8%                    | 961             | 4%                     | 13%                    |
| GCC*                 | 246             | 14%                     | 26%                    | 260             | 5%                      | 21%                    | 332             | -26%                   | -9%                    | 199             | -34%                   | -34%                   |
| Germany              | 602             | -11%                    | 28%                    | 966             | 21%                     | 7%                     | 988             | 4%                     | 10%                    | 786             | -3%                    | 14%                    |
| Hong Kong (SAR)**    | 49              | -31%                    | 23%                    | 59              | -44%                    | -4%                    | 44              | -69%                   | -56%                   | 18***           | -80%                   | -67%                   |
| India                | 119             | 0%                      | 32%                    | 232             | 4%                      | 25%                    | 133             | -43%                   | -28%                   | 119             | 1%                     | -18%                   |
| Irish Republic       | 744             | 14%                     | 1%                     | 690             | -4%                     | -5%                    | 724             | 1%                     | -6%                    | 780             | 2%                     | 19%                    |
| Italy                | 427             | -11%                    | 2%                     | 491             | -12%                    | 30%                    | 534             | -15%                   | 34%                    | 419             | -21%                   | -16%                   |
| Japan                | 82              | 8%                      | 44%                    | 64              | -32%                    | 74%                    | 28              | -77%                   | -66%                   | 52              | -48%                   | 4%                     |
| Netherlands          | 393             | -1%                     | 6%                     | 604             | 31%                     | 23%                    | 513             | -15%                   | -11%                   | 457             | -13%                   | -12%                   |
| New Zealand          | 34              | 55%                     | -9%                    | 61              | 16%                     | -10%                   | 131             | 72%                    | 22%                    | 67              | 81%                    | 27%                    |
| Norway               | 137             | -1%                     | -1%                    | 154             | 3%                      | -4%                    | 165             | 1%                     | 11%                    | 167             | -15%                   | 9%                     |
| Poland               | 482             | 26%                     | 12%                    | 461             | 12%                     | 9%                     | 210             | -50%                   | -48%                   | 299             | -31%                   | -20%                   |
| Romania              | 251             | -2%                     | 17%                    | 201             | -7%                     | 19%                    | 135             | -34%                   | -32%                   | 120             | -47%                   | -47%                   |
| Saudi Arabia         | 59              | 70%                     | 11%                    | 73              | 33%                     | 37%                    | 153             | 95%                    | 50%                    | 59              | 11%                    | -24%                   |
| South Korea          | 60***           | -7%                     | 78%                    | 40              | -53%                    | -18%                   | 24              | -70%                   | -63%                   | 45              | -38%                   | 31%                    |
| Spain                | 621             | 18%                     | 25%                    | 663             | 5%                      | 42%                    | 604             | 11%                    | 1%                     | 671             | 9%                     | 4%                     |
| Sweden               | 138             | -30%                    | -9%                    | 183             | -6%                     | -11%                   | 126             | -35%                   | -10%                   | 166             | -18%                   | -5%                    |
| Switzerland          | 184             | -7%                     | -5%                    | 274             | 13%                     | 11%                    | 197             | -4%                    | -24%                   | 195             | -30%                   | -27%                   |
| United Arab Emirates | 87              | -5%                     | 10%                    | 112             | -14%                    | 18%                    | 100             | -49%                   | -37%                   | 74              | -46%                   | -48%                   |
| USA                  | 881             | 15%                     | 6%                     | 1,584           | 23%                     | -6%                    | 1,813           | 26%                    | 15%                    | 1,307           | 30%                    | 27%                    |

International Passenger Survey by the ONS 2024. 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 3 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. The change in methodology at Dover-Calais from Q3 2024 is more likely to negatively impact inbound estimates from Eastern Europe and some Western European markets in 2024.

# Selected markets - Quarterly 2024 spend

| Spend (£m)           | Q1 2024<br>(GB) | % change<br>vs. Q1 2019 | % change<br>vs Q1 2023 | Q2 2024<br>(GB) | % change<br>vs. Q2 2019 | % change<br>vs Q2 2023 | Q3 2024<br>(GB) | % change<br>vs Q3 2019 | % change<br>vs Q3 2023 | Q4 2024<br>(GB) | % change<br>vs Q4 2019 | % change<br>vs Q4 2023 |
|----------------------|-----------------|-------------------------|------------------------|-----------------|-------------------------|------------------------|-----------------|------------------------|------------------------|-----------------|------------------------|------------------------|
| Australia            | £232            | 66%                     | 26%                    | £383            | 15%                     | -8%                    | £684            | 65%                    | 2%                     | £366            | 28%                    | 11%                    |
| Austria              | £38             | 7%                      | 16%                    | £55             | 40%                     | -20%                   | £82             | 54%                    | 29%                    | £111            | 159%                   | 42%                    |
| Belgium              | £72             | 20%                     | -18%                   | £126            | 71%                     | 15%                    | £187            | 56%                    | 14%                    | £120            | 13%                    | 0%                     |
| Brazil               | £85             | 34%                     | -23%                   | £80             | 68%                     | -12%                   | £86             | -11%                   | -31%                   | £57             | 39%                    | -42%                   |
| Canada               | £110            | -19%                    | -37%                   | £344            | 57%                     | 43%                    | £292            | 17%                    | -20%                   | £146            | 12%                    | -24%                   |
| China                | £152            | -31%                    | 102%                   | £129            | -67%                    | -24%                   | £261            | -59%                   | -32%                   | £182            | -61%                   | 7%                     |
| Denmark              | £56             | 11%                     | -30%                   | £112            | 16%                     | 72%                    | £167            | 107%                   | 28%                    | £96             | -5%                    | 12%                    |
| France               | £385            | 47%                     | 7%                     | £661            | 125%                    | 68%                    | £442            | 5%                     | -7%                    | £484            | 15%                    | 19%                    |
| GCC*                 | £572            | 16%                     | 11%                    | £439            | -3%                     | 3%                     | £814            | -8%                    | -2%                    | £396            | -49%                   | -41%                   |
| Germany              | £312            | 31%                     | 35%                    | £641            | 51%                     | 25%                    | £707            | 36%                    | 8%                     | £432            | 12%                    | 0%                     |
| Hong Kong (SAR)**    | £83             | -22%                    | 23%                    | £78             | -46%                    | -5%                    | £57             | -71%                   | -54%                   | £37***          | -67%                   | -66%                   |
| India                | £154            | 46%                     | 30%                    | £292            | 27%                     | 27%                    | £227            | -24%                   | -13%                   | £133            | 14%                    | -32%                   |
| Irish Republic       | £254            | 22%                     | -24%                   | £253            | 17%                     | -16%                   | £260            | 25%                    | -17%                   | £280            | -14%                   | -3%                    |
| Italy                | £213            | -10%                    | -3%                    | £274            | 21%                     | 21%                    | £417            | 5%                     | 43%                    | £197            | -21%                   | -16%                   |
| Japan                | £79             | 53%                     | 38%                    | £72             | -13%                    | 32%                    | £28             | -80%                   | -67%                   | £68             | -26%                   | 48%                    |
| Netherlands          | £191            | 64%                     | 11%                    | £361            | 88%                     | 34%                    | £368            | 33%                    | -12%                   | £250            | 18%                    | -4%                    |
| New Zealand          | £57             | 248%                    | 38%                    | £99             | 198%                    | 6%                     | £160            | 95%                    | 4%                     | £59             | 49%                    | 2%                     |
| Norway               | £79             | 7%                      | -21%                   | £103            | 36%                     | -14%                   | £142            | -3%                    | 43%                    | £148            | 5%                     | 15%                    |
| Poland               | £95             | 13%                     | -5%                    | £121            | 13%                     | 39%                    | £67             | -54%                   | -51%                   | £106            | -34%                   | -29%                   |
| Romania              | £69             | -36%                    | -3%                    | £58             | -57%                    | 5%                     | £86             | -3%                    | -3%                    | £46             | -57%                   | -43%                   |
| Saudi Arabia         | £123            | -17%                    | -23%                   | £151            | 20%                     | 60%                    | £361            | 97%                    | 41%                    | £136            | -20%                   | -30%                   |
| South Korea          | £50***          | -5%                     | 131%                   | £36             | -60%                    | -59%                   | £29             | -62%                   | -64%                   | £63             | -3%                    | 123%                   |
| Spain                | £272            | 49%                     | 43%                    | £406            | 56%                     | 80%                    | £362            | 25%                    | 12%                    | £326            | 33%                    | -1%                    |
| Sweden               | £87             | 11%                     | 15%                    | £143            | 42%                     | 9%                     | £77             | -26%                   | -31%                   | £94             | -20%                   | 1%                     |
| Switzerland          | £116            | 7%                      | -30%                   | £230            | 85%                     | 38%                    | £150            | -8%                    | -37%                   | £147            | -15%                   | -21%                   |
| United Arab Emirates | £185            | 17%                     | 29%                    | £146            | -31%                    | -7%                    | £154            | -44%                   | -51%                   | £129            | -43%                   | -57%                   |
| USA                  | £875            | 28%                     | -5%                    | £1,924          | 55%                     | -6%                    | £2,626          | 95%                    | 31%                    | £1,839          | 102%                   | 44%                    |

International Passenger Survey by the ONS 2024. 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 3 for more information. GCC\*: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and UAE. \*SAR refers to Special Administrative Region. \*\*Caution: low sample size. The change in methodology at Dover-Calais from Q3 2024 is more likely to negatively impact inbound estimates from Eastern Europe and some Western European markets in 2024.

### **3. Appendix & Survey Background**

# Sample size – GB level

**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 | 7,436   | 7,698   | 12,451  | 13,639  | 41,244 |

| Journey Purpose | Q1 2024 | Q2 2024 | Q3 2024 | Q4 2024 | 2024   |
|-----------------|---------|---------|---------|---------|--------|
| Holiday         | 2,502   | 3,008   | 5,305   | 5,184   | 15,999 |
| 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     | 4,857   | 4,259   | 7,537   | 9,439   | 26,092 |
| → EU Total       | 4,434   | 3,869   | 6,974   | 8,740   | 24,017 |
| → EU 15          | 3,686   | 3,270   | 6,283   | 7,884   | 21,123 |
| → Other EU       | 748     | 599     | 691     | 856     | 2,894  |
| → Rest of Europe | 423     | 390     | 563     | 699     | 2,075  |
| North America    | 1,251   | 1,939   | 2,848   | 2,330   | 8,368  |
| Rest of World    | 1,328   | 1,500   | 2,065   | 1,870   | 6,763  |

| 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 |
| GCC*                 | 211     | 160     | 290     | 260     | 3,513 |
| Germany              | 484     | 640     | 1,255   | 1,134   | 921   |
| Hong Kong (SAR)**    | 53      | 61      | 37      | 29      | 180   |
| India                | 99      | 188     | 201     | 144     | 632   |
| Irish Republic       | 680     | 450     | 1,049   | 1,409   | 3,588 |
| 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                  | 1,064   | 1,690   | 2,484   | 2,047   | 7,285 |

# 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, unless states so
- Data from 2024 is 'Official Statistics in Development'
- 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



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