

Annual Inbound Update GB Nations & Regions

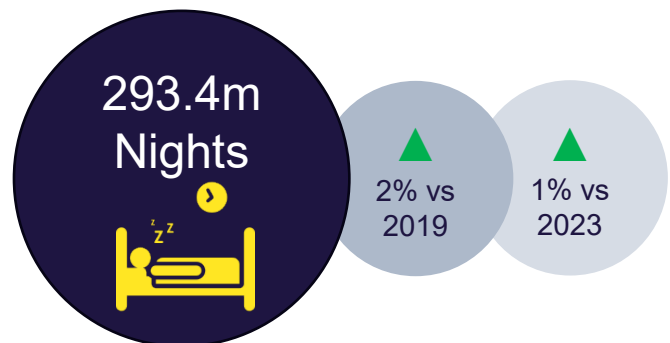
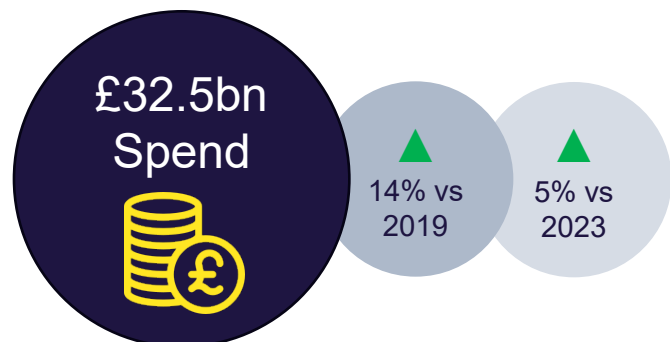
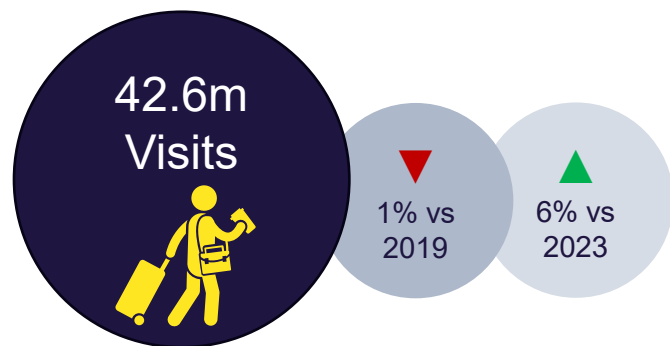
Final 2024 estimates

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

Published 26th August 2025



Headline statistics for IPS 2024: Nations & Regions



Scotland
4.4m visits (▲ 9% vs 2023)
£4.0bn spend (▲ 11% vs 2023)

North West
3.4m visits (▼ 1% vs 2023)
£2.0bn spend (▼ 6% vs 2023)

West Midlands
2.0m visits (▲ 5% vs 2023)
£1.1bn spend (▼ 0% vs 2023)

Wales
929,000 visits (▲ 4% vs 2023)
£488m spend (▲ 7% vs 2023)

South West
2.4m visits (▼ 2% vs 2023)
£1.5bn spend (▲ 4% vs 2023)

South East
4.6m visits (▲ 6% vs 2023)
£2.7bn spend (▲ 10% vs 2023)

High: 2024 visits above 2023 levels
Low: 2024 visits below 2023 levels

North East
429,000 visits (▼ 6% vs 2023)
£252m spend (▼ 30% vs 2023)

Yorkshire & the Humber
1.1m visits (▼ 3% vs 2023)
£533m (▼ 17% vs 2023)

East Midlands
1.1m visits (▲ 1% vs 2023)
£547m spend (▼ 9% vs 2023)

East of England
2.4m visits (▲ 8% vs 2023)
£1.2bn (▲ 6% vs 2023)

London
20.9m visits (▲ 3% vs 2023)
£17.3bn spend (▲ 4% vs 2023)

Source: International Passenger Survey by the ONS. UK totals are ONS estimates.
UK growth figures are VB estimates and are not endorsed by ONS.

Introduction (1)

This report is based on the **final estimates** from the International Passenger Survey (IPS) data released by the Office for National Statistics (ONS) on the morning of **26th 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 from **VisitBritain modelling** include data from the new methodology introduced from Q3 2024 but instead include Dover to Calais data for Q3 and Q4 from 2023 (instead of 2024) and the Northern Ireland data from 2023 with an applied NISRA growth rate for non-UK visitor overnights between 2023 and 2024 (which saw a slight decline). Whilst these estimates use assumptions and are not endorsed by the ONS, it tries to address how inbound tourism performed in 2024 vs 2023. UK data from VisitBritain modelling is available at the annual and quarterly level.
- **GB** estimates by the **ONS** have been published by year, quarter, journey purpose, global regions and markets, as well as nations/regions estimates. 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. Please note that the nations/regions data therefore does not adjust for the Dover-Calais and lorry driver issues outlined on slide 3 and therefore reflect a lower UK total number than implied by the VisitBritain UK-level estimate.

VisitBritain modelled
estimates for 2024

ONS estimates with
VisitBritain
comparisons

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3. Latest inbound nations and regions: quarterly 2024 - volume and value headlines
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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.



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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 slightly 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, 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 just fell short of 2023 levels.
- For spend across 2024, most regions had recovered to 2019 levels, apart from the North East and Yorkshire. London, East of England, South West and South East all reported growth vs 2023, West Midlands saw spend on par with the previous year and the remaining 4 regions saw YoY declines.
- **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 2024. TOTAL GB figures do not the sum of each region as visitors may visit more than one nation/region. 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.

2. Latest Inbound GB Nations and Regions statistics

Full year 2024

Regional volume headlines 2024

VisitBritain modelled
UK estimates for
2024

ONS estimates with
VisitBritain
comparisons

Visits (000)	2019	2023	2024	% change vs 2019	% change vs 2023
London	21,714	20,277	20,945	-4%	3%
Rest Of England	16,930	15,231	15,537	-8%	2%
North East	536	459	429	-20%	-6%
North West	3,441	3,417	3,367	-2%	-1%
Yorkshire	1,328	1,147	1,116	-16%	-3%
West Midlands	2,428	1,889	1,990	-18%	5%
East Midlands	1,202	1,083	1,089	-9%	1%
East Of England	2,266	2,209	2,381	5%	8%
South West	2,599	2,431	2,388	-8%	-2%
South East	5,396	4,312	4,590	-15%	6%
Scotland	3,457	3,987	4,366	26%	9%
Wales	1,027	892	929	-10%	4%
Total UK	40,857	37,959	40,036	-1%	6%

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 slightly better recovery vs visits to the Rest of England although both saw YoY growth in visits. London received a little over half (54%). This is in line with the proportions of visits received in 2019 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 England region to see growth in inbound vs 2019 was East of England (+5%) which also saw the highest growth vs 2023 (8%), followed by South East (+6%). West Midlands (+5%) and East Midlands (+1%).
- Scotland continues to lead recovery with a record 4.4m visits, up 26% vs 2019 and up 9% vs 2023.
- Wales remained behind 2019 levels at -10%, although saw growth of 4% compared to 2023.

International Passenger Survey by the ONS 2024 (nation/region figures) / *VisitBritain modelled estimates for 2024 (Total UK). Total UK figures do not match the sum of each region as visitors may visit more than one nation/region. The ONS are not endorsing comparisons with previous years – see slide 3 for more information.

Regional value headlines 2024

VisitBritain modelled
UK estimates for
2024

ONS estimates with
VisitBritain
comparisons

Spend (£m)	2019	2023	2024	% change vs 2019	% change vs 2023
London	£15,700	£16,697	£17,287	10%	4%
Rest Of England	£9,051	£9,893	£9,827	9%	-1%
North East	£367	£360	£252	-31%	-30%
North West	£1,611	£2,155	£2,032	26%	-6%
Yorkshire	£637	£644	£533	-16%	-17%
West Midlands	£1,043	£1,058	£1,053	1%	0%
East Midlands	£461	£600	£547	19%	-9%
East Of England	£1,019	£1,116	£1,179	16%	6%
South West	£1,327	£1,464	£1,517	14%	4%
South East	£2,581	£2,477	£2,713	5%	10%
Scotland	£2,547	£3,593	£3,981	56%	11%
Wales	£515	£458	£488	-5%	7%
Total UK	£28,448	£31,075	£32,478	14%	5%

While overall visits levels were 96% of that reported in 2019, inbound spend to 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 £17.3bn in the capital in 2024, up 10% on 2019 and up 4% vs 2023.
- Of the English regions (outside London), the South East (£2.7bn), the North West (£2.0bn) and the South West (£1.5bn) reported the largest value. Both the South East and East of England set spend records in 2024.
- Seven England regions reported spend growth vs 2019, while spend to the North East and Yorkshire were still below pre-COVID levels. London, East of England, South West, and South East all reported growth vs 2023.
- Inbound visitors to Scotland in 2024 spent a record £4.0bn, up 56% vs 2019 and up 11% vs 2023.
- Visitors to Wales spent £488 million in 2024, still below pre-COVID levels (-5%) but higher than in 2023 (+7%).

International Passenger Survey by the ONS 2024 (nation/region figures) / *VisitBritain modelled estimates for 2024 (Total UK). The ONS are not endorsing comparisons with previous years – see slide 3 for more information. Figures shown as nominal spend (not adjusted for inflation) unless otherwise stated.

3. Latest quarters: Inbound Nations and Regions

Quarterly 2024

Quarterly 2024 - regional volume headlines

VisitBritain modelled
UK estimates for
2024

ONS estimates with
VisitBritain
comparisons

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	4,732	4%	13%	5,634	5%	6%	5,366	-12%	-1%	5,213	-8%	-2%
Rest Of England	3,448	5%	12%	4,370	0%	12%	4,456	-16%	-5%	3,263	-18%	-9%
North East	107	11%	77%	142	-2%	21%	96	-47%	-48%	85	-25%	-12%
North West	810	17%	9%	1,009	10%	19%	839	-7%	-11%	709	-24%	-19%
Yorkshire	255	1%	5%	301	-1%	-1%	320	-29%	-9%	240	-25%	-3%
West Midlands	564	4%	36%	554	-10%	13%	484	-34%	-14%	388	-27%	-8%
East Midlands	236	-8%	4%	335	20%	22%	301	-16%	-13%	218	-30%	-7%
East Of England	492	15%	3%	521	-4%	-11%	759	1%	25%	609	12%	12%
South West	446	10%	26%	725	4%	19%	809	-20%	-15%	408	-17%	-21%
South East	864	-6%	11%	1,298	-9%	18%	1,506	-19%	3%	921	-22%	-5%
Scotland	602	36%	6%	1,364	49%	17%	1,326	5%	-8%	1,073	28%	33%
Wales	151	-3%	0%	293	-4%	16%	308	-19%	-12%	177	-4%	28%
Total UK*	8,588	3%	12%	10,888	5%	10%	11,135	-6%	2%	9,695	-6%	3%

International Passenger Survey by the ONS 2024 (nation/region figures) / *VisitBritain modelled estimates for 2024 (Total UK). TOTAL UK figures do not the sum of each region as visitors may visit more than one nation/region. The ONS are not endorsing comparisons with previous years – see slide 3 for more information.

Quarterly 2024 - regional value headlines

VisitBritain modelled
UK estimates for
2024

ONS estimates with
VisitBritain
comparisons

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	£3,406	9%	2%	£4,458	20%	5%	£5,082	13%	8%	£4,340	-1%	-1%
Rest Of England	£1,815	35%	3%	£2,769	26%	18%	£3,200	-1%	-10%	£2,043	-11%	-8%
North East	£41	6%	-37%	£86	6%	16%	£53	-51%	-60%	£72	-49%	-17%
North West	£444	59%	19%	£663	47%	24%	£488	6%	-26%	£436	3%	-26%
Yorkshire	£124	55%	-6%	£117	13%	-25%	£174	-38%	-29%	£118	-32%	8%
West Midlands	£240	40%	26%	£271	45%	0%	£266	-40%	-30%	£276	13%	27%
East Midlands	£90	19%	-33%	£149	28%	20%	£219	42%	-1%	£89	-22%	-26%
East Of England	£177	23%	-29%	£262	-2%	6%	£434	18%	13%	£306	26%	30%
South West	£261	49%	28%	£478	36%	25%	£561	4%	-2%	£217	-17%	-29%
South East	£439	15%	6%	£743	18%	36%	£1,005	14%	5%	£527	-23%	-5%
Scotland	£322	53%	-9%	£1,308	84%	20%	£1,546	47%	3%	£805	40%	24%
Wales	£71	29%	6%	£157	18%	28%	£181	-10%	-10%	£79	-37%	18%
Total UK*	£5,686	18%	1%	£8,809	28%	11%	£10,497	14%	4%	£7,486	-1%	1%

International Passenger Survey by the ONS 2024 (nation/region figures) / *VisitBritain modelled estimates for 2024 (Total UK). The ONS are not endorsing comparisons with previous years – see slide 3 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.

Nation/Region	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024
London	3,507	3,516	5,753	7,045	19,821
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

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 stated 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:

- **Rest of England / RoE**– 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

For more information, please contact

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