

Tourism State of the Nation

VisitBritain/VisitEngland

September 2025



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Recent trend:

- Encouraging signals for July from flight booking data, with August probably around level with last year, and strong numbers in the first half of September. Inbound to non-London airports growing faster than total.
- Domestic tourism down in June and mixed performance year to date.

Forward look:

- Flight bookings for the autumn period are slightly up on last year for European visitors but slightly down from long haul, though good recent pace of bookings has improved the short term outlook. Some concern about recent US economic indicators, presenting a risk to prospects.
- Domestic intentions have fallen, with a rise in worry about the cost of attractions.

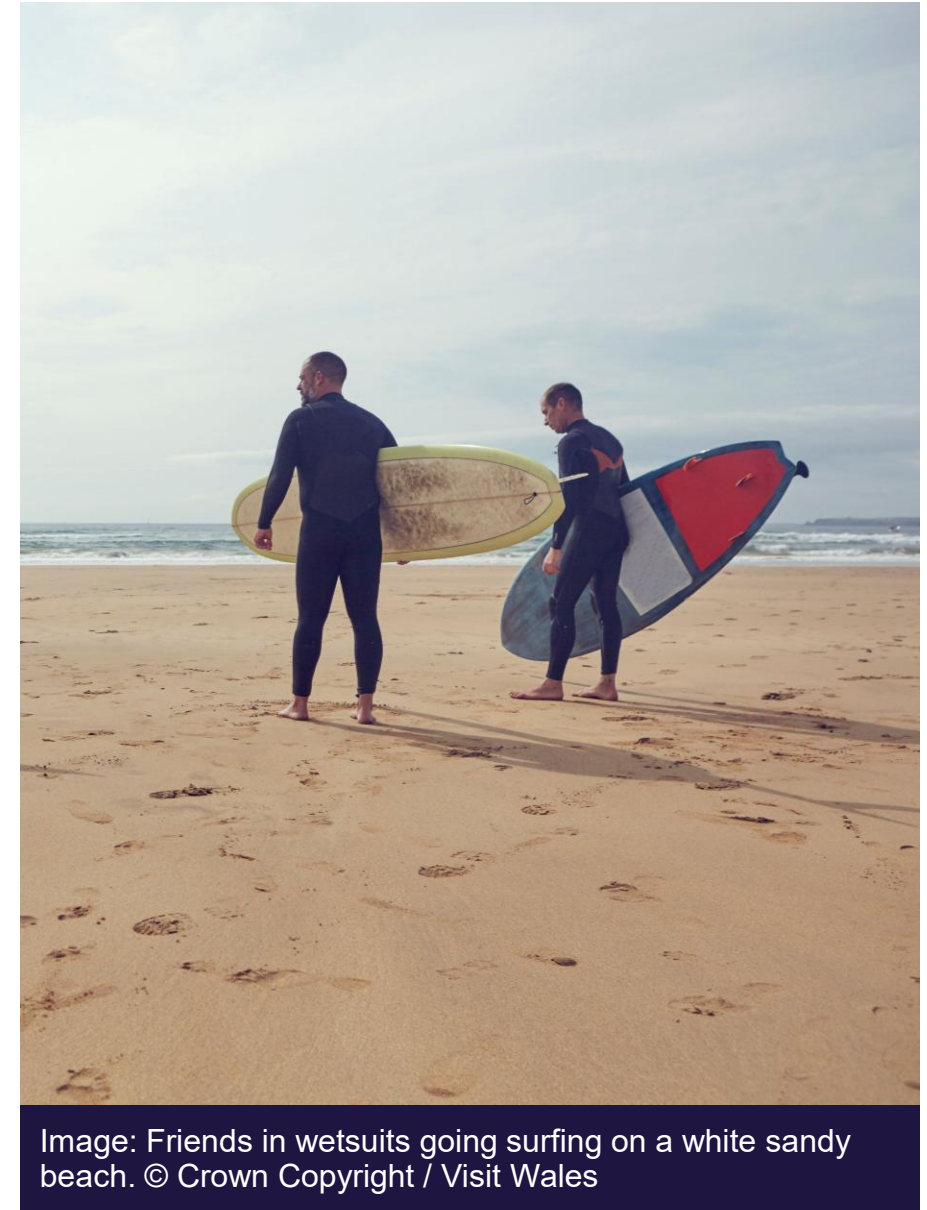


Image: Friends in wetsuits going surfing on a white sandy beach. © Crown Copyright / Visit Wales

Tourism State of the Nation September 2025: Inbound performance and prospects

- **Recent performance:** Steady recent performance. Inbound flight arrivals were up 3% in July and level with 2024 in August. Arrivals up vs 2024 in the first half of September. Arrivals from Europe showing strong year on year growth in recent weeks. This followed indications across various data sources suggesting overall inbound arrivals were approximately on par with 2024 in the first half of the year, with card spending data indicating a decline in spend per visit driven by short length of stay. Non-London airports have been outperforming London airports recently, with inbound arrivals to non-London up 9% over the last three months, and to London down 2%.
- **Prospects:** Outlook has warmed. Flight bookings for the September-November period are 2% up on last year for European visitors but down 3% from long haul. This is an improvement on the previous outlook, as the pace of inbound flight bookings has been good; bookings made in August were up 6% on 2024, and up 7% from North America, improving the previously sluggish numbers. Bookings from the Middle East are tracking 11% lower for Sep-Nov, although this is against a very strong 2024; however, bookings from China are tracking 8% up for the same period after a slow summer.
- **Traveller behaviour:** Operators reporting that many travellers, especially from North America, are adopting a wait-and-see approach. Feedback from the US is that the luxury segment is doing well and mid market is performing OK but air costs and pricing are perceived as expensive for the UK. Reports from operators of nervousness amongst some US travellers about potential border problems on their return.

Tourism State of the Nation September 2025:

Global context and drivers

- **Economic outlook:** The global growth outlook has been fractionally upgraded to 2.7% this year and 2.5% next year (rebounding to 2.8% in 2027). The EU is forecast to grow by 1.4% and 1.0%; the US 1.9% and 2.0%. There is some concern in the US about rising inflation at the same time as weak employment numbers, with the risk of a short bout of stagflation. The Federal Reserve chose to address the latter when cutting the interest rate in September, with another cut possible later in the year. Risks are weighted to the downside.
- **Economic drivers:** The euro has strengthened recently, aiding outbound travel from the Eurozone; the pound stands at €1.15, close to its lowest level since 2023. The pound has been stable against the dollar in recent weeks at \$1.35, with the dollar remaining relatively weak by the standards of the last few years.
- **Geopolitical:** Oil price has been steady recently. Iran airspace re-opened in July, aiding journey times on some routes from India and the Middle East. A resolution to the Ukraine war could bring down price pressures and re-open more airspace.
- **Competitive view:** The UK stands to lose market share this year, with visits to Western Europe forecast to grow by 5% and globally by 8%, and the UK forecast to see 3% growth, although this came on the back of the UK performing well and gaining share within Europe in 2024. Inbound tourism to the US is forecast to decline by 8% this year.

Tourism State of the Nation September 2025: Domestic and tourism industry

- **Recent performance:** A weak June, with volume and value down for both overnights and day trips. In the first half of 2025, the number of overnight trips is down on 2024 by 7% (and vs 2022/23) but the value of spending is up, by 12% on a weak 2024. Day trips are down vs 2024 for both volume and value.
- **Domestic and outbound outlook:** Domestic trip intentions fell to a two-year low in September, although the scale of the decline was moderate (74% intending to take a trip in the next 12 months, down from 77% a year ago). Outbound intentions are holding up, level with last year at 61%. Concern about the cost of visitor attractions has jumped to its highest level since tracking began in 2022.
- **Economic outlook:** The short term outlook remains modest. Forecasts are unchanged since last month, with GDP growth of 0.9% expected for next year (and consumer spending similar at 1.0%), a slowdown from the 1.3% forecast this year. Inflation remains well above target at 3.8%, constraining the possibility of further interest rate cuts this year. Consumer confidence fell in September, although remains within its recent range.
- **Industry data:** Slow signals for accommodation, better for arts/entertainment/recreation. Accommodation sector revenues were up 2% year-on-year in July, below inflation, although up 4% in the past three months. Food/drink services revenues are up 5% and arts/entertainment/recreation sector revenues are up 8% in the past three months, and both beat inflation in July itself. Business expectations of turnover in the hospitality sector are well down year-on-year, although more balanced in the arts/entertainment/recreation sector.