

Tourism State of the Nation

VisitBritain/VisitEngland

December 2025



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Recent trend:

- Flight data suggests a slow end to the year for inbound. Across the year, sources suggest that inbound volumes were probably up slightly on 2024. European source markets have been showing stronger growth than long haul in the aggregate, though in comparison to a strong 2024 for the latter.
- Year to date, domestic day trip performance has been similar to 2024 (and strong in Q3); overnight volumes have been weak but spend is up.

Forward look:

- Inbound flight bookings for the next few months are down year-on-year so far, approaching the key booking window.
- Perceived financial barriers to taking overnight domestic trip have increased, despite falling inflation.



Image: Exterior view to a heritage castle in the winter
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Tourism State of the Nation December 2025: Inbound performance and prospects

- **Recent performance:** Flight data suggest a slow end to the year with arrivals tracking 2% below 2024 in December, and flat in November, following 2% growth in October. Across the year, sources indicate that inbound volumes were probably slightly up on 2024; flight arrivals so far are on par with 2024, with those from Europe 2% up and long haul 1% down. Home Office admissions data showed arrivals from non-UK nationals in both the second and third quarters on par with 2024 (after 2% growth in Q1). Visa card data is available to August, and shows trip volumes up 3% vs 2024 and spend up 2%.
- **Prospects:** Flight bookings have been slow over the last few months and bookings for Dec-Feb are 1% down year-on-year. As per the recent trend, bookings for this period from Europe are up (4%) and those from long haul markets are down (-4%); they are down by double digits from Middle East, South Asia and Sub-Saharan Africa. The key booking window for many markets is the post-Christmas period.
- **Perceptions of the UK:** Nation Brands Index results for 2025 have been released; this is a long-running survey measuring global perceptions of 60 countries. The UK was ranked as the 6th strongest nation brand in the world. Culture and Tourism remain areas of strength for the UK; Culture was ranked 4th, with all attributes retaining high ranks; contemporary culture (3rd), cultural heritage (7th) and sport (8th). The UK is ranked as the 8th strongest tourism brand, supported by high appeal for historic buildings (4th) and vibrant city life (6th). Welcome (20th) remains the UK's relative weakness. For detailed analysis please read the [full report](#).

Tourism State of the Nation December 2025:

Global context and drivers

- **Economic outlook:** Overall forecasts have not changed significantly. The global economy is forecast to grow 2.6% in 2026, similar to 2025's 2.7%. The US is forecast to grow by 2.5% in 2026 (up from 2.0% in 2025) and the EU 1.1% (down from 1.5%). US unemployment has hit a four-year high although inflation has unexpectedly fallen. Stock markets have calmed after a wobble in November. Global growth is likely to be led in 2026, as it was in 2025, by India (6.3%), with China forecast to grow by 4.5%.
- **Exchange rate:** The pound has been relatively stable in recent weeks. A euro buys £0.88; the purchasing power of Eurozone visitors to the UK is up from 83p a year ago and close to an 18-month high. A US dollar buys £0.75, having weakened from £0.79 a year ago and weaker than its 2022-24 level.
- **Geopolitical:** The oil price has held its low level and fell below \$60/barrel in mid-December for the first time since 2021. The decline has been driven by potential oversupply and weakening demand, as well as the possibility of more Russian oil in world markets if there is a Ukraine peace deal. Jet fuel prices have also fallen in recent weeks, easing air travel costs.
- **Competitive view:** Western Europe arrivals are forecast to grow by 4% in 2025, so the UK is likely to lose market share with its neighbours. Global arrivals are forecast to grow 5% in 2025. In 2026, Western European arrivals are forecast to grow 5% and globally 8%.

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

- **Domestic outlook:** Although perceptions of the cost of living crisis have improved, perceived financial barriers to taking overnight domestic trip have seen an increase, as well concern about the cost of accommodation and of drinking/eating out. Domestic trip intentions for the next 12 months are down year on year (77% vs 80%), although up since the end of the summer.
- **Recent performance:** Some encouraging signs although overnight volumes are still slow. In Q3 (Jul-Sep), domestic overnight trips in England were slightly (2%) down year-on-year, and also below 2022/23, but spend performed better, up 5% and also well up on 2022-23. Day trip volumes and values were up on 2022-24. Year to date, day trip performance has been similar to 2024; overnight volumes have been weak but spend is up.
- **Economic outlook:** Growth forecasts have been revised up fractionally but the economy, as well as consumer spending, are still forecast to grow just 1.0% in 2026 in real terms. Inflation fell by more than expected, to 3.2% from a high of 3.8% a few months ago, and is forecast to ease further to 2.7% in 2026. This enabled the Bank of England to cut the base rate, easing conditions for consumers and businesses.
- **Holiday season prospects:** 21% of adults in Britain 'definitely' plan to take a domestic overnight 'holiday / short break' between Christmas and New Year (11.6m adults), according to VisitEngland's Trip Tracker. This corresponds to an estimated spend of £3.3 billion. Christmas / New Year intentions are up on 2023/24.
- **Industry data:** Hotel room demand has been consistently lower than 2024 throughout 2025 and in October.