Tourism State of the Nation

VisitBritain/VisitEngland

April 2026

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Recent trend:

- Inbound: Flight data suggests that Q1 2026 was below 2025.
- Domestic: Indications of recent overnight trip taking have been a little slow, although Easter intentions were up on last year.

Forward look:

- Inbound: Overall flight bookings remain below 2025 levels and those on the book for the next few months are tracking several percent below last year. Recent bookings from the Middle East have been around half last year's level and from India around a third below. Those from Europe and North America are slightly down. Key consumer concerns in most markets are around flight prices and the increase in the cost of living.
- Domestic and industry: Domestic trip intentions have picked back up, with outbound intentions down on last year. However, concerns about the cost of living and its impact on trips have jumped, with a particular worry about the cost of fuel.

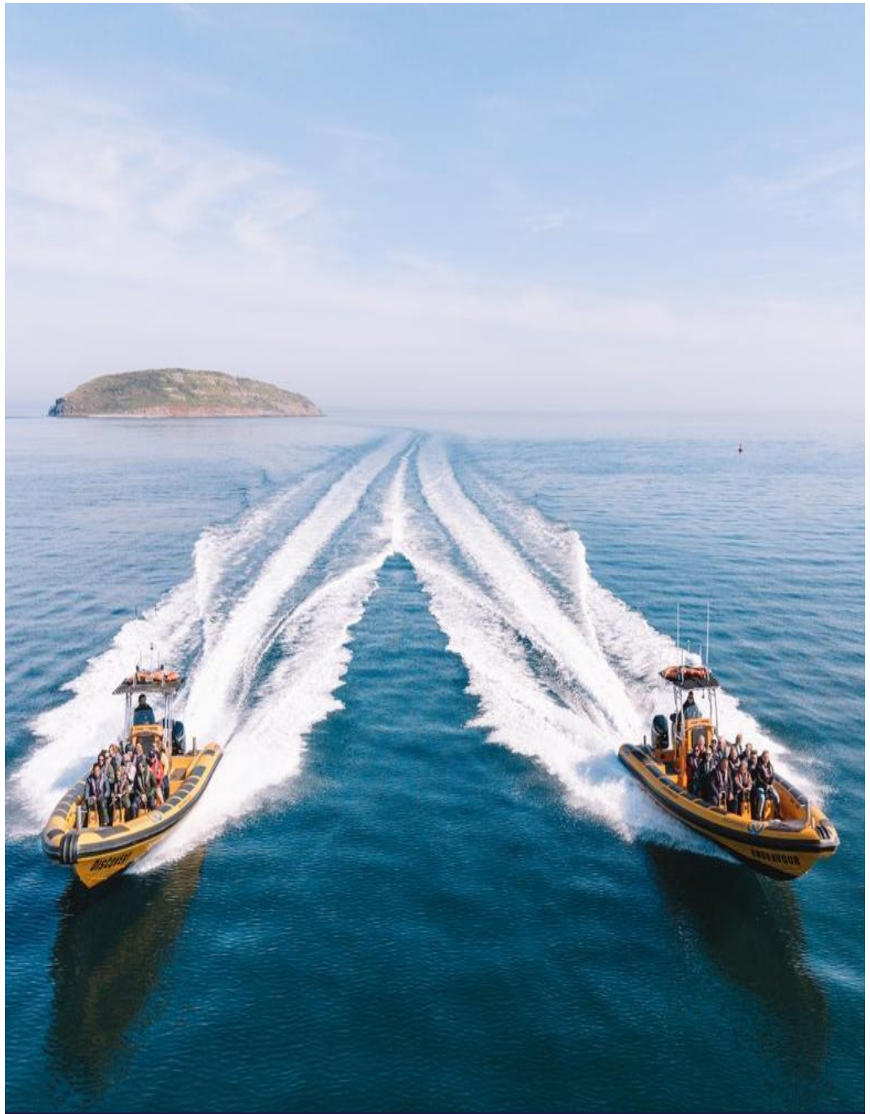

Image: People on a high speed Anglesey Boat Trips tour near Menai Bridge in the Isle of Anglesey © Anglesey Boat Trips / Kris Williams

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Tourism State of the Nation April 2026: Inbound performance and prospects

- **Recent performance:** Flight data suggests a slow start to 2026, with bookings in the Forward Keys database down 6% in January and 7% in February, with March down 8%.
- **Prospects:** Flights on the book for May are tracking 8% down on last year, with the outlook improving slightly on this, although still below last year's levels: 4% down in June, 5% down for July and 2% down for August. The pace of bookings made since the conflict began has been highly variable. Over the last nine weeks of data, the pace of flight bookings has been 8% below those made in the same weeks in 2025. (In the most recent week they have been up due to timing of Easter.) Bookings to non-London airports are down by 11% over the same timeframe, falling a little more than those to London (8%), although this comes on the back of stronger growth by non-London airports in 2025; those to Scottish airports are down by a milder 3%.
- **Global regions:** From Europe flight bookings have been 9% down and for long haul overall 9% down since the conflict began; within the latter, bookings from North East Asia have been up substantially (17%), and from Oceania by 9% with a surge in the early weeks of the conflict due to passengers securing flights transiting via non-Gulf hubs. Bookings from the Middle East have halved (48% down) and from South Asia down 30%; those from North America are 7% down on 2025.
- **Competitive view:** Oxford Economics have revised up their forecast for growth in inbound tourism to Western Europe this year but have revised down their forecast for UK. In part this reflects the Middle East and India comprising a greater share of tourism to the UK than to Europe, and strong growth expected this year for sunshine destinations in southern Europe.
- **2025 performance:** In 2025, VisitBritain estimates that inbound visits grew by 2% overall in 2025, and the value of spending by inbound visitors by 3%. Throughout most of 2025, European markets showed better year-on-year performance in aggregate than long haul.

Source: VisitBritain, Visa, Oxford Economics, Forward Keys/Amadeus

Tourism State of the Nation April 2026: Global context and drivers

- **Oil price:** Due to the Iran conflict and the near-closure of the Strait of Hormuz, the oil price, the biggest single driver of short-term inflation, has jumped. It has risen from around $70/barrel before the conflict began, and lows of below $60 around the turn of the year, to a range of $90-$110, the highest since 2022. This is already exacerbating cost of living pressures globally. More specifically, the jet fuel price has risen by an even greater degree, around double the average price seen in 2025 as of late April, although is down slightly from its high point.
- **Economic outlook:** Expectations for growth this year have been downgraded further. The forecast for US real economic growth in 2026 has been lowered from 2.8% to 1.9% and for the Eurozone from 1.1% to 0.8%. Forecasts for next year are 2.7% and 1.5% respectively. In the US, consumer spending is forecast to grow by a more sluggish 1.7% (in the Eurozone 0.9%), a sharp downgrade from the 2.5% expected as of February. These are central forecasts and there is a very wide range of plausible outturns either side. Different countries are being affected by varying degrees, for example related to their dependence on oil and gas imports.
- **Exchange rate:** The main exchange rates have not changed substantially. At time of writing the US dollar stands at 74p, in the middle of its recent range, and similar to its level a year ago. The euro is currently trading at 87p, having been quite stable against the pound over the last several months, and slightly down from a year ago.
- **Global consumer confidence & trends:** There is a cautious, wait-and-see attitude in many markets. The main concerns for most consumers and trade are around jet fuel prices, rising fares and increased cost of living. Britain, along with the rest of Europe is not being perceived negatively in relation to the conflict. The return of some Gulf connections is aiding long-haul connectivity.

Source: VisitBritain, Oxford Economics, Bank of England, IATA

Tourism State of the Nation April 2026: Domestic and tourism industry

- **Domestic outlook:** At the overall level, intentions for domestic overnight trips recovered in April after a dip in March. 78% intend to take a trip in the next 12 months, essentially unchanged from 77% a year ago. Outbound intentions are still down, however, with 60% intending to take a trip abroad, compared to 65% a year ago, although have recovered slightly from March's low point. "Global conflicts or warzones overseas" was cited by many as a reason for a preference for a domestic break, although still behind cost, ease of planning and shorter/quicker travel. However, concerns about the cost of living and its impact on trips have jumped. 26% say they are likely to reduce the number of overnight trips over the next six months as a result of the cost of living crisis, and 32% the number of day trips. There has been a sudden increase in worry about the cost of fuel as a barrier to domestic trip taking, to 34% in April from 22% in March.
- **Economic outlook:** The outlook has worsened sharply. Consumer confidence has fallen in each of the last three months, and in April slid to its lowest level since 2023. Perceptions of the general economy and of personal finances fell noticeably in April, although one optimistic outlier is that confidence about making major purchases has been steady and is level with a year ago. Inflation has ticked up to 3.3%, and is forecast to average 3.9% this year overall, up from expectations of 2.5% in February. Expectations of interest rate cuts have faded. Consumer spending growth forecast for 2026 has been cut from 0.9% to 0.4%. Fuel could start to be a barrier to trip taking; petrol prices are up 23% and diesel 50% year-on-year.
- **Recent performance:** Recent trip taking is around on par with this time last year, with 13% having taken a domestic overnight trip between January and March 2026, vs 14% in the same period in 2025.
- **Industry data:** Business confidence has dropped across the economy and also in the leisure sector. Confidence about business performance over the next year is still net positive in the arts, entertainment and recreation sector, whereas in the hospitality sector confidence about the next year is net negative.

Source: VisitEngland, ONS, Oxford Economics, DESNZ