

Tourism State of the Nation

VisitBritain/VisitEngland

September 2026



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Recent trend:

- Inbound: VisitBritain estimates visits were up by around 1% in the first half of the year, with growth from Europe and a decline from long haul. The summer looks like a continuation of this trend.
- Domestic: Recent performance appears to be steady: similar to, or slightly up on, early 2025.

Forward look:

- Inbound: There has been an increase in the pace of flight bookings from long haul markets in recent weeks, pointing to a recovery from the slow levels seen in the middle of the year. Our inbound forecast for the year overall is growth in both visits and spending of 2%.
- Domestic: Holiday intentions picked up in September after a couple of slightly sluggish months. Consumer confidence is holding up for now, but there are growing pressures on inflation, especially from fuel and gas prices, which will squeeze consumers for late 2026 and into next year.



Image: Durham Cathedral in autumn in County Durham, England. © Visit County Durham

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

- **Recent performance:** Looking across several available data sources, VisitBritain estimates that the first half of the year saw visits up by an estimated 1% (3% in the first quarter and a decline of 1% in the second quarter). Sources suggest that July and August were also probably slow, but a pickup from September.
- **Prospects:** Flight bookings were stronger over the summer, and into September, than their slow pace earlier in the year, with a marked improvement from long haul markets. Flight arrivals for September-November are still running 6% below 2025 in the Forward keys database, although this source has been more pessimistic than other sources lately so this could yet translate into numbers on par or slightly up on last year for late 2026.
- **Overall 2026 forecast:** VisitBritain forecasts 44.2 million visits to the UK in 2026, with these visitors spending £33.9 billion. This would be growth of 2% in both visits and nominal spending (1% decline in spending in real terms) vs 2025. We estimate this to be 103% and 119% of 2019 levels respectively. Please see the [VisitBritain website](#) for more details on the forecast, as well as information on data sources, methodology and comparability with official statistics from the ONS.
- **Global regions:** Some long haul regions that saw sharp declines earlier in the year have seen flights bookings growth in recent weeks (India, Australia, Middle East), with North American bookings also picking up. Overall this year, European markets are forecast to grow 4% by volume and 7% value; long haul markets to decline 3% by volume and 2% by value.
- **Nations/Regions:** VisitBritain estimates that in the first half of the year inbound spending in England was up 2% year-on-year, to Scotland up 9% and to Wales down 11%. Within England, spending in London was up 1%; North West (11%) and North East (10%) led growth. (These estimates are primarily based on Visa card data). More recently, flight arrivals to London and Rest of England have been tracking lower than 2025 by similar degrees in June-August, but Scotland's trend has been several percentage points higher.

Tourism State of the Nation September 2026:

Global context and drivers

- **Economic outlook:** Steady prospects recently; the US economy is forecast to grow by 2.1% this year, and the EU by 1.1%, a slight upgrade for the latter and downgrade for the former. Inflation is a risk, necessitating recent interest rate rises in both the US and the Eurozone; these will weigh on consumer spending. Natural gas prices are a specific concern for the winter. Growth next year is forecast to be a little higher at 2.4% (US) and 1.3% (EU). Within Europe, Spain, Poland and the Nordics are seeing stronger economic growth, with France, Germany and Italy all growing by 1% or less. Globally, growth will be led by India and China this year; Gulf markets are expected to contract this year, before a likely rebound next year.
- **Oil price:** The oil price has risen again in September, and at time of writing stands at \$97/barrel, up 45% year on year, not far off its spring highs. The jet fuel price has also climbed and is more than double its 2025 level, putting upwards pressure back onto air costs, though again still below spring highs.
- **Exchange rate:** The pound has been stable recently against the euro with €1 buying 86p, almost the same as a year ago. The pound has weakened in recent weeks against the dollar, with \$1 buying 76p, up from 74p a year ago.
- **Travel trends:** Many markets continue to report price sensitivity in light of cost pressures, fuel costs and economic uncertainty, although these are generally not dampening the desire to travel itself. Some opportunities for cooler destinations in light of the hot summer. For European source markets, recent sentiment in market and trade feedback has been positive, particularly for city breaks. Luxury, experience-led and shoulder-season trips are strong from the US, although many are value-conscious. Demand for Britain remains strong from China, especially for education-related travel, VFR, and affluent older travellers.

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

- **Domestic outlook:** Domestic holiday intentions picked up in September after a couple of slightly sluggish months. 78% intend to take a trip in the next 12 months, up from 74% a year ago. Outbound intentions are level with last year, with 61% intending a trip in the next 12 months; this is a little up from levels seen in July and August, but still below the levels seen before the Iran conflict. In recent months, spending less on eating/drinking out has been the most commonly cited response to cost of living pressures on domestic trips.
- **Recent performance:** The value of Visa card spending on overnight trips was 1% up year on year in the second quarter of the year, and 2% up in the first half of the year overall. Adjusting for inflation, these numbers are slightly below last year. Spending has grown fastest in Northern England and the Midlands.
- **Economic outlook:** Inflationary pressures are clouding prospects, although consumer confidence is still holding up for now. Consumer spending growth of just 1.0% is expected this year, falling to 0.2% next year, partly a result of higher oil and natural gas prices putting upwards pressure on inflation, which is now forecast to surpass 4% early next year. Petrol prices have continued to rise to their highest this year (up 29% year on year) and are at their highest level since 2022; diesel prices are up 39% and reached their highest level ever. However, consumer confidence ticked up again in September to a two-year high.
- **Industry data:** Hotel room demand was around on par with last year in August, although was slightly down in June and July. Average daily rates were up by 7% in August (following more moderate increases in June and July); accommodation sector business performance is up 5% year to date, eating/drinking out 7%, and arts/recreation/culture 4%. Business confidence about the next 12 months is balanced (similar proportions are positive vs negative) for hospitality and slightly positive for arts/recreation/culture.