

Annual Inbound Update GB Nations & Regions

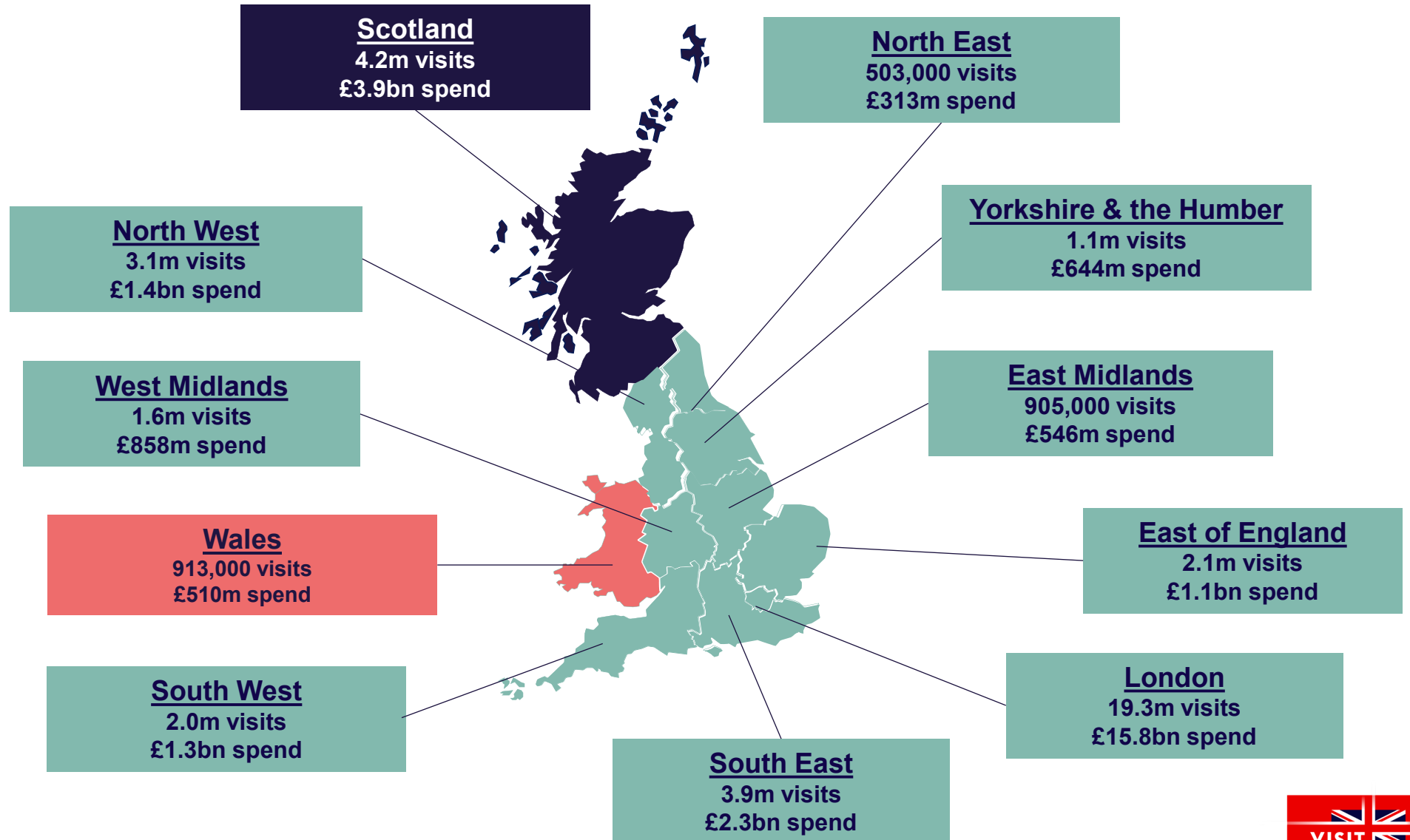
2025 estimates

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

Published 16th October 2026



Headline statistics for IPS 2025: Nations & Regions



Source: International Passenger Survey by the ONS. UK totals are ONS estimates.

Introduction (1)

This report is based on the **estimates** from the International Passenger Survey (IPS) data released by the Office for National Statistics (ONS) on the morning of **16th October 2026** covering **2025**. 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:

- 2025 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 between the old methodology (pre-July 2024) and new methodology (post July-2024), and therefore comparisons shown in this report are only for H2 2025 vs H2 2024 (both under the new methodology). The ONS are assessing options for measuring discontinuities from the old and new time series including options for adjusting the back series (please refer to the latest ONS article on improvements).
- The new methodology from July 2024 includes pseudo records for freight (lorry drivers) who are not captured via data collection at the ports, as they were in the old methodology. These pseudo records represent those who travel to the UK via sea (at Dover) and tunnel (at Eurotunnel). These records are included in the total inbound estimates at the UK, GB and total business visits level, and, for freight via Eurotunnel only, records are also included in the Europe total. Therefore, freight records are not available at any other breakdown including at the market or nations/regions level, so the sum of these will not tally up to the totals where the pseudo records are present.
- The ONS continue to explore the feasibility of incorporating Northern Ireland data from NISRA into the new methodology. These estimates are included in the UK total but any estimates below this level are at the GB level only (i.e. exclude Northern Ireland).
- As sample sizes for nations and regions are smaller than national estimates, results at this level may be subject to greater year-on-year variation.
- The ONS are also undertaking a review of the historical data, so previous years data may be subject to marginal change.

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Explore the quarterly* IPS data in more detail on the [VisitBritain website](#) via the pivot tables (Excel). One version contains data up to 2024 and the second includes 2025 data only.



In due course, we'll be updating our 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

London remained the UK's leading destination for inbound visitors in 2025. However, growth in the second half of the year was stronger outside the capital, with Scotland and Wales recording notable increases in both visits and spend while several England regions also saw growth. Spending growth was particularly strong across Scotland, Wales and parts of regional England.

Visits:

- In 2025, there were 19.3m inbound visits to London, with 52% of all inbound visits including a trip to London, vs 13.6m visits to the Rest of England (37% of all visits). For the second half of 2025, visits to both regions saw a slight uplift.
- Scotland received 4.2m inbound visits in 2025, with visits up 6% in H2 2025, whilst there were 913,000 visits to Wales in 2025, with visits up 23% in H2 2025.
- Across England regions (outside London), growth in visits for the second half of the year was seen from North East, Yorkshire, North West, West Midlands and East Midlands.

Spend (in nominal terms, not adjusted for inflation):

- Across 2025, London received £15.8bn spend vs £8.5bn for the Rest of England. For H2 2025, spend to London was down 1% whilst spend to the Rest of England grew 2%.
- Visitors spent £3.9bn in Scotland and £510m in Wales in 2025. Scotland saw 16% growth in the second half of the year whilst Wales spend grew 43%.
- For England regions outside London, growth in spend was seen from North East, Yorkshire, East Midlands, South West and South East.

International Passenger Survey by the ONS 2025. The ONS are not endorsing comparisons between the old and new methodology, therefore only H2 comparisons are being shown (see slide 3 for more information). As sample sizes for nations and regions are smaller than national estimates, results at this level may be subject to greater year-on-year variation.

2. Latest Inbound GB Nations and Regions statistics

Full year 2025 and H2 2025 comparisons

Regional volume headlines 2025

Visits (000)	2025	Visits (000)	H2 2024	H2 2025	% change vs 2024
London	19,292	London	10,330	10,397	1%
Rest Of England	13,589	Rest Of England	7,259	7,422	2%
North East	503	North East	175	291	67%
North West	3,076	North West	1,457	1,619	11%
Yorkshire	1,142	Yorkshire	542	698	29%
West Midlands	1,609	West Midlands	815	883	8%
East Midlands	905	East Midlands	488	515	5%
East Of England	2,123	East Of England	1,308	1,106	-15%
South West	2,014	South West	1,146	1,136	-1%
South East	3,911	South East	2,273	2,215	-3%
Scotland	4,175	Scotland	2,315	2,464	6%
Wales	913	Wales	436	538	23%
Total UK	40,787	Total UK	-	-	-

2025:

- London received 19.2m visits in 2025 vs 13.6m for the Rest of England.
- The most visited England regions (excluding London) in 2025 were the South East (3.9m visits), the North West (3.1m visits), East of England (2.1m visits) and the South West (2.0m visits).
- Scotland saw 4.2m inbound visits in 2025, while there was 913,000 visits to Wales.

Inbound visits to most nations and regions saw growth in H2 2025 vs H2 2024:

- Visits to both London and Rest of England saw a slight uplift compared to H2 2024. London received a little over half (52%) of visits to GB. This is in line with the proportions of visits received in H2 2024.
- Within England, the largest growth in inbound visits vs H2 2024 was North East* (+67%), followed by Yorkshire (+29%), North West (+11%), West Midlands (+8%) and East Midlands (+5%).
- Scotland saw visits up 6% vs H2 2024, whilst visits to Wales rose by 23%.

**Note: Growth in visits and spend to the North East in H2 2025 appear particularly high because estimates for H2 2024 were particularly low. As sample sizes for nations and regions are smaller than national estimates, results at this level may be subject to greater year-on-year variation.*

International Passenger Survey by the ONS 2025. Total UK figures do not match the sum of each region as visitors may visit more than one nation/region. *UK data is not available below the annual level. The ONS are not endorsing comparisons between the old and new methodology, therefore only H2 comparisons are being shown (see slide 3 for more information).

Regional value headlines 2025

Spend (£m)	2025	Spend (£m)	H2 2024	H2 2025	% change vs 2024
London	£15,824	London	£9,091	£8,997	-1%
Rest Of England	£8,489	Rest Of England	£4,876	£4,997	2%
North East	£313	North East	£121	£196	62%
North West	£1,446	North West	£843	£774	-8%
Yorkshire	£644	Yorkshire	£290	£414	43%
West Midlands	£858	West Midlands	£511	£483	-6%
East Midlands	£546	East Midlands	£291	£348	20%
East Of England	£1,073	East Of England	£727	£608	-16%
South West	£1,299	South West	£733	£784	7%
South East	£2,303	South East	£1,361	£1,382	2%
Scotland	£3,920	Scotland	£2,140	£2,477	16%
Wales	£510	Wales	£231	£330	43%
Total UK	£29,808	Total UK*	-	-	-

2025:

- London received £15.8bn spend from inbound visitors vs £8.5bn for the Rest of England.
- Of the English regions (outside London), the South East (£2.3bn), the North West (£1.4bn), the South West (£1.3bn) and the East of England (£1.1bn) reported the largest value in 2025.
- Scotland saw visitor spend of £3.9bn, with visitors spending £510m in Wales.

Most regions and nations saw spend by inbound visitors grow year-on-year in H2 2025:

- Five England regions reported spend growth vs H2 2024, these were North East* (62%), Yorkshire (43%), East Midlands (20%), South West (7%) and South East (2%). Spend to London (-1%), West Midlands (-6%), North West (-8%) and East of England (-16%) fell below previous year levels.
- Inbound visitors to Scotland spent 16% more in H2 2025 than H2 2024.
- Spend in Wales saw particularly strong growth of 43% vs H2 2024.

**Note: Growth in visits and spend to the North East in H2 2025 appear particularly high because estimates for H2 2024 were particularly low. As sample sizes for nations and regions are smaller than national estimates, results at this level may be subject to greater year-on-year variation.*

International Passenger Survey by the ONS 2025. *UK data is not available below the annual level. The ONS are not endorsing comparisons between the old and new methodology, therefore only H2 comparisons are being shown (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 2025

Quarterly 2025 - regional volume headlines

Visits (000)	Q1 2025	Q2 2025	Q3 2025	% change vs Q3 2024	Q4 2025	% change vs Q4 2024
London	4,008	4,888	5,424	4%	4,973	-3%
Rest Of England	2,676	3,491	4,235	2%	3,187	3%
North East*	107	105	169	87%	123	45%
North West	710	747	868	9%	752	13%
Yorkshire	181	263	395	29%	303	28%
West Midlands	324	403	520	16%	362	-2%
East Midlands	177	213	307	9%	208	1%
East Of England	455	561	651	-11%	456	-22%
South West	325	553	757	-1%	379	-1%
South East	644	1,052	1,338	-3%	877	-1%
Scotland	531	1,179	1,497	21%	968	-10%
Wales	121	254	366	36%	171	3%

**Note: Growth in visits and spend to the North East in H2 2025 appear particularly high because estimates for H2 2024 were particularly low. As sample sizes for nations and regions are smaller than national estimates, results at this level may be subject to greater year-on-year variation.*

International Passenger Survey by the ONS 2025. 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 between the old and new methodology, therefore only H2 comparisons are being shown (see slide 3 for more information).

Quarterly 2025 - regional value headlines

Spend (£m)	Q1 2025	Q2 2025	Q3 2025	% change vs Q3 2024	Q4 2025	% change vs Q4 2024
London	£2,809	£4,018	£4,865	0%	£4,132	-3%
Rest Of England	£1,424	£2,068	£3,159	8%	£1,837	-5%
North East	£57	£60	£119	132%	£78	11%
North West	£295	£377	£447	-1%	£327	-16%
Yorkshire	£100	£129	£267	69%	£147	12%
West Midlands	£157	£218	£286	12%	£196	-23%
East Midlands	£86	£112	£206	1%	£142	66%
East Of England	£228	£237	£376	-8%	£232	-27%
South West	£156	£359	£543	3%	£241	16%
South East	£345	£576	£913	4%	£469	-3%
Scotland	£306	£1,138	£1,488	9%	£989	28%
Wales	£53	£126	£236	50%	£94	29%

International Passenger Survey by the ONS 2025. UK data is not available below the annual level. The ONS are not endorsing comparisons between the old and new methodology, therefore only H2 comparisons are being shown (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 2025	Q2 2025	Q3 2025	Q4 2025	2025
London	6,084	6,190	6,486	7,199	25,959
Rest Of England	4,016	4,635	5,140	4,962	18,753
North East	200	189	233	282	904
North West	716	710	866	1,024	3,316
Yorkshire	301	426	513	444	1,684
West Midlands	680	719	816	660	2,875
East Midlands	283	365	380	340	1,368
East Of England	601	700	710	635	2,646
South West	609	789	977	703	3,078
South East	1,015	1,399	1,661	1,384	5,459
Scotland	914	1,446	1,661	1,535	5,556
Wales	288	450	666	450	1,854

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 4,000 per month under the new methodology which started in 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 states so
- Data for 2024 and 2025 is badged as '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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