



Visit York Tourism Conference 2025 Latest Tourism Insights and Trends

Katerina Rysova, Senior Insights Manager, VisitBritain and VisitEngland

29 January 2025

Bristol Balloon Fiesta: Destination Bristol ©Gary Newman



What topics I am going to cover...

- ❖ Re-cap
- ❖ Tourism statistics
- ❖ Spotlight on York
- ❖ Outlook
- ❖ Travel trends

Re-cap

Looking back, following the pandemic, domestic tourism started to recover in 2021, while international travel recovery began in 2022.

2021

The start of the return of domestic tourism

Travel restrictions removed from April

Staycations prioritised over outbound due to ongoing concerns around COVID

2022

The start of the return of inbound tourism

(but also outbound) especially in summer

Cost of living crisis which started impacting consumers' choices

2023

The return towards 2019

Outbound travel impacted domestic tourism

Inbound still behind 2019 levels

Cost of living crisis and increased cost of holidays had an increasing impact on domestic tourism

2024

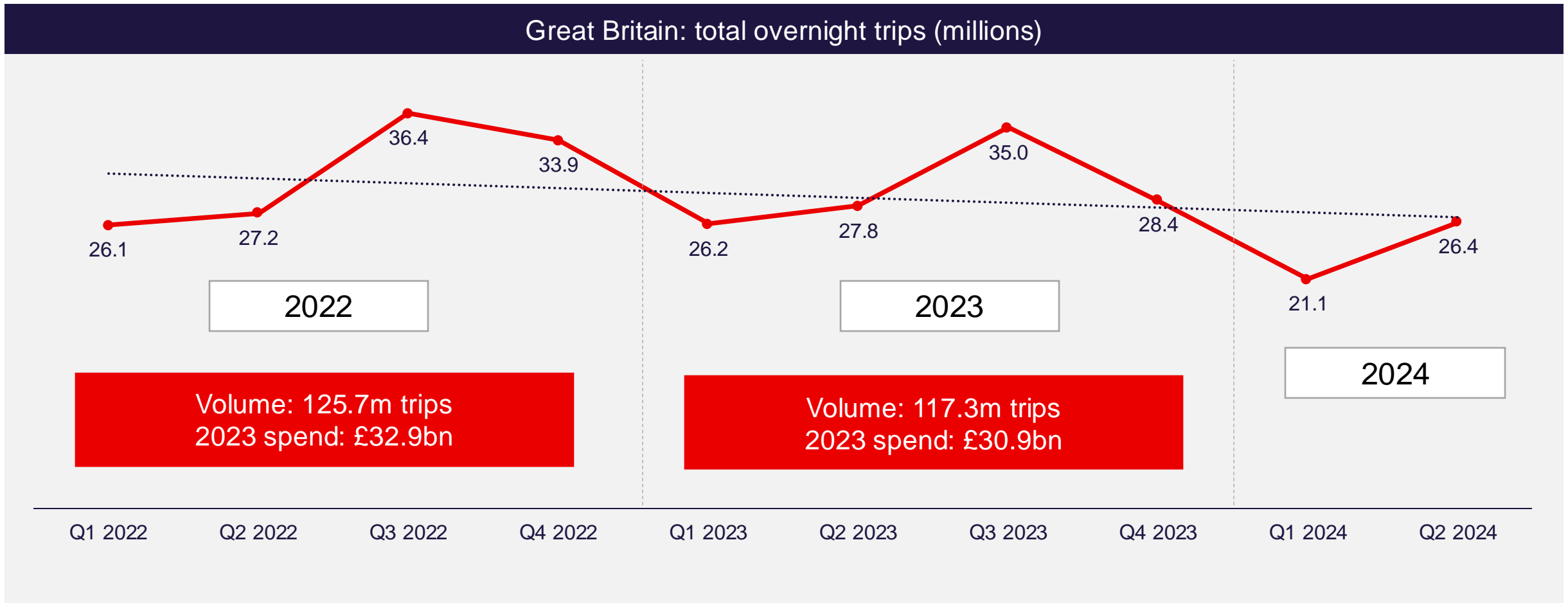
The return of 'normality'

Domestic overnight trips replaced by domestic day visits or cancelled in favour of outbound

International travel growing towards 2019 levels

Tourism statistics

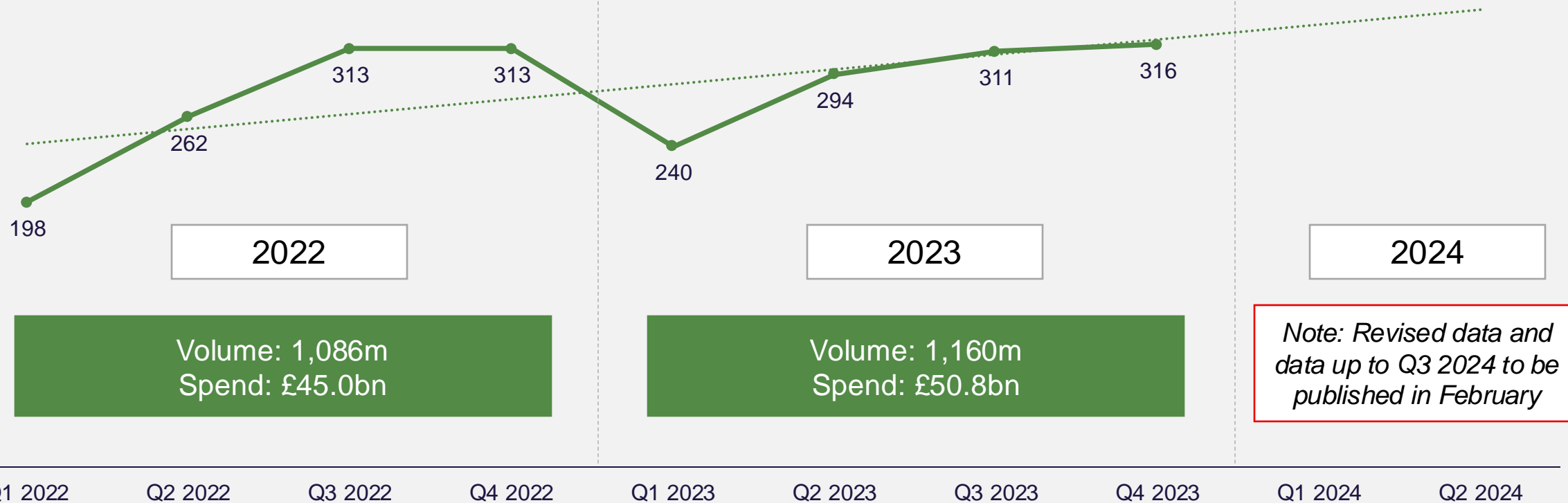
Domestic overnight trips have been declining.



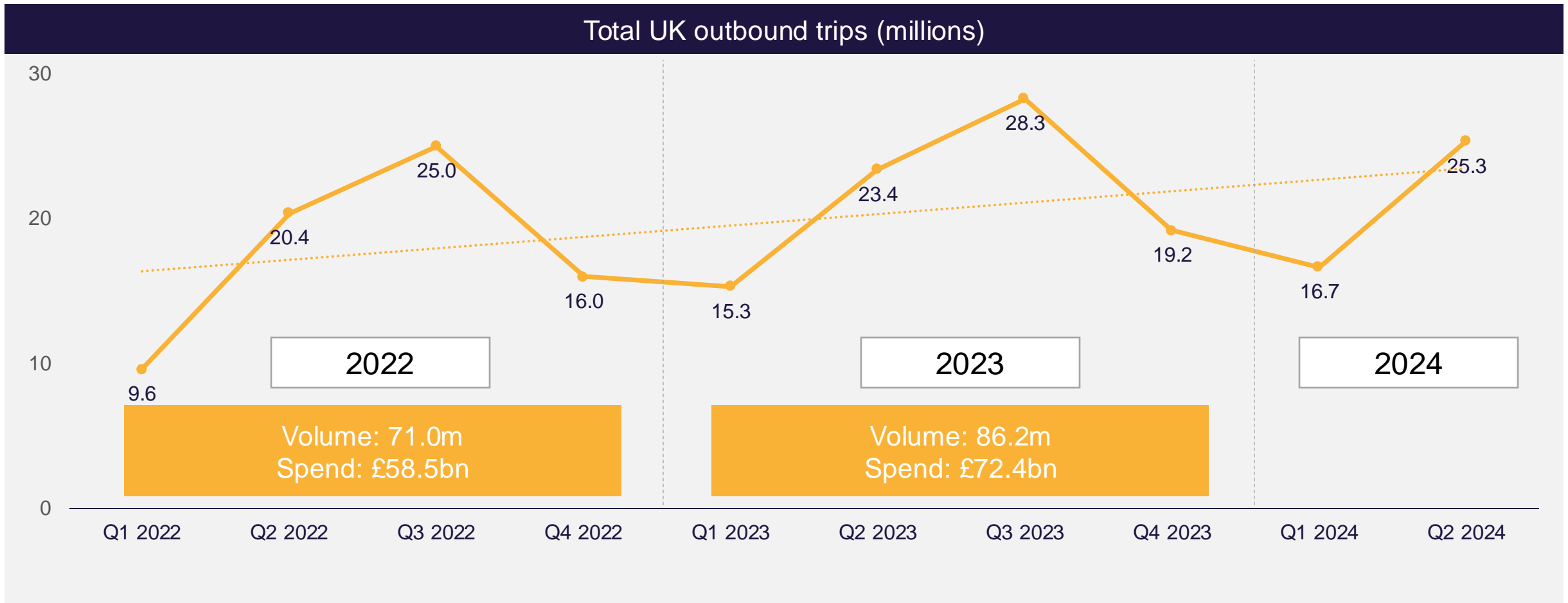
Source: Great Britain Domestic Overnight Tourism Statistics

While domestic tourism day visits have been increasing, replacing some of domestic overnight trips.

Great Britain: total tourism day visits (millions) **NOTE: PROVISIONAL DATA**

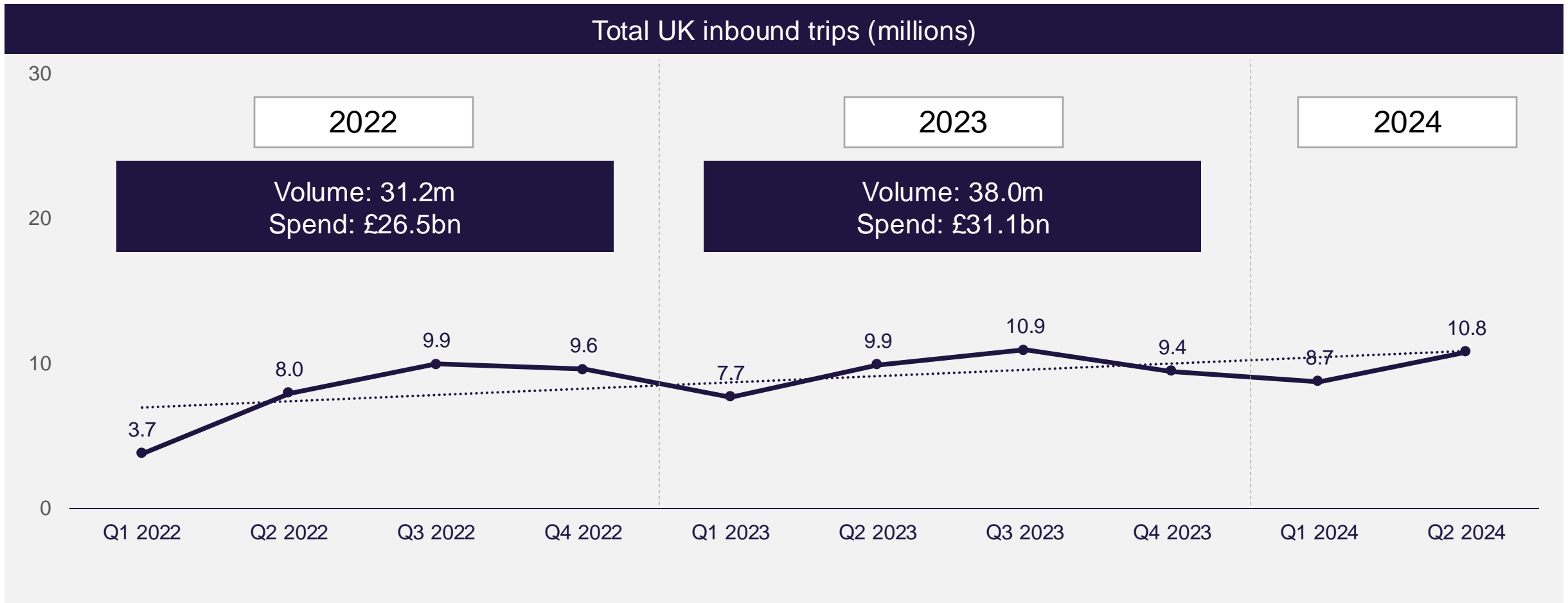


Outbound trips have been increasing, replacing some of domestic overnight trip.



Source: International Passenger Survey
Base: UK residents

Positively for the UK, inbound trips have been steadily increasing with Q1 and Q2 2024 above 2019 levels.



Source: International Passenger Survey
Base: overseas residents

In 2023, England attractions (visitors being both domestic and inbound) reported y-on-y increase in visits, however, had not yet recovered to 2019 levels.



+10%

The increase in **gross revenue** in 2023 compared with 2022 reflected the increase in visits and the admission price rise.

Admissions volume for participating attractions

	2019	2020	2021	2022	2023
Number of visits	273.75 million*	95.81 million*	124.56 million	176.87 million	196.14 million
Y-on-y % change in visits	/	-65%	+30%	+42%	+11%
% difference from 2019 visit volume	/	-65%	-55%	-35%	-28%

Inbound VFR and holiday visits were back and above 2019 levels for Q1 and Q2 2024, while study and business were still behind 2019 levels.

Visits (000)	Q1 2024	% change vs Q1 2019	% change vs Q1 2023	Q2 2024	% change vs Q2 2019	% change vs Q2 2023	YTD 2024	% change vs YTD 2019	% change vs YTD 2023
Holiday	3,307	12%	19%	4,502	0%	2%	7,810	5%	9%
VFR	2,999	12%	5%	3,291	10%	5%	6,290	11%	5%
Business	1,746	-18%	23%	2,055	-6%	21%	3,801	-12%	22%
Study	78	-2%	6%	132	-14%	48%	210	-9%	29%
Misc.	600	22%	5%	799	53%	32%	1,399	38%	19%

For domestic overnight trips in the first half of 2024, ‘domestic overnight stays as part of an overseas trip’ was the only trip purpose to increase in H1 2024 y-on-y (as international travel picks up).

Britain Trips (million)	H1 2023	H1 2024	Change vs H1 2023	Share of trips, H1 2024
Holiday	15.7	14.2	-10%	30%
Visiting friends / relatives	20.7	18.5	-11%	39%
Business	3.1	2.6	-16%	5%
UK stay, part of outbound	4.2	4.4	6%	9%
Miscellaneous	14.5	12.2	-16%	17%

Inbound visitors spend a similar budget per night as GB domestic visitors, however, as they go for longer trips, their average spend per trip is larger.

UK inbound	Q1 2024	Q2 2024
Average number of nights per trip	6.7	7.1
Average spend per trip	£633	£733
Average spend per night	£95	£103

GB domestic	Q1 2024	Q2 2024
Average number of nights per trip	2.8	2.8
Average spend per trip	£251	£294
Average spend per night	£90	£105



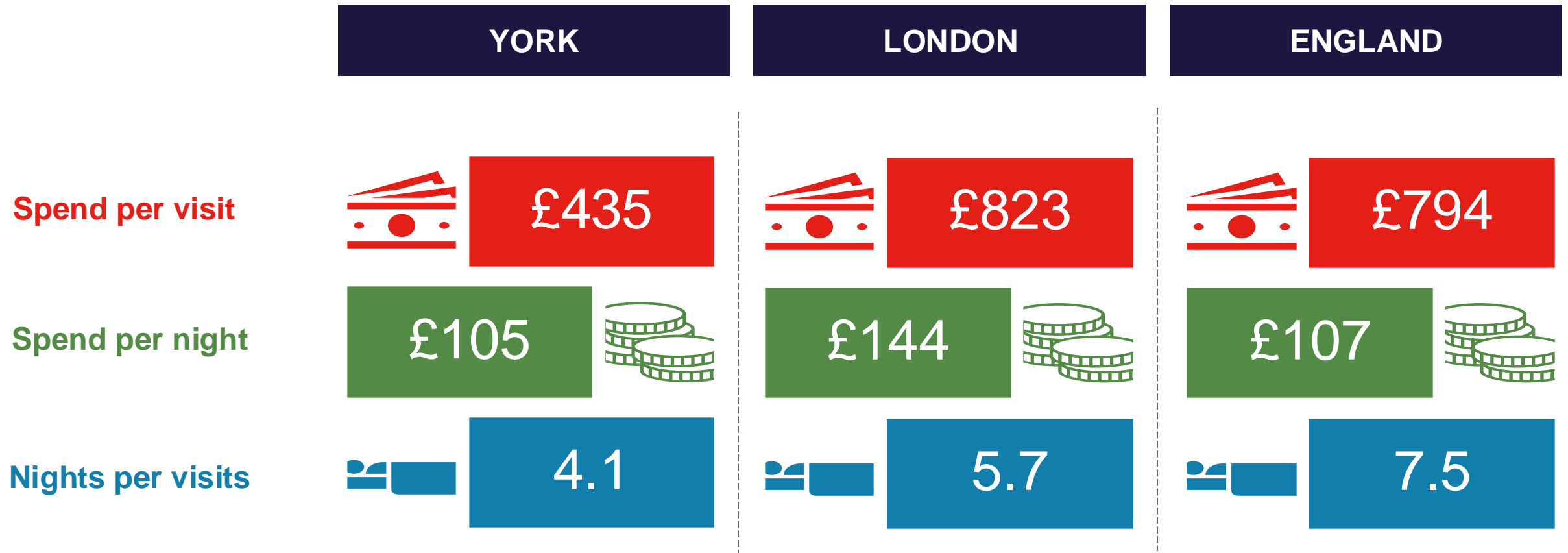
Left: International Passenger Survey by the ONS 2019, 2022 & 2023 (provisional).
 Right: Great Britain Tourism Survey by VisitEngland, VisitScotland and Visit Wales
 All values and percentage changes in spend are in nominal terms.

Spotlight on York

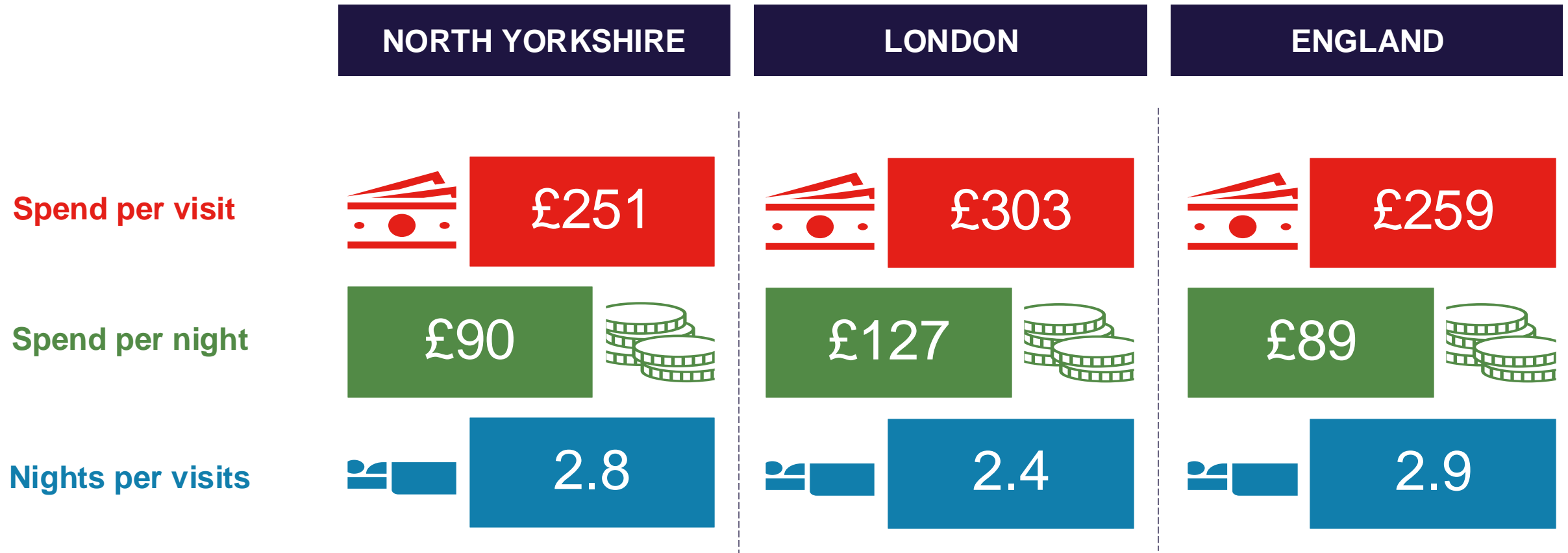
In 2023, volume of inbound visits to York still being behind 2019 levels, while increased vs 2022.

	2022	2023	
Number of inbound visits	193,000	276,000	(2019: 297,000)
Total visitor spend	£92m	£120m	
Average spend per visit	£473	£435	
Average spend per night	£79	£105	
Average nights per visits	6.0	4.1	

Inbound Tourism in 2023: trips of any purpose



Domestic overnight trips in 2022 – 2023 (annual average): trips of any purpose



For inbound holidays, York was 7th most visited England town in 2023.

Rank	All inbound visits	Trips [000]
1	London	20,277
2	Manchester	1,721
3	Birmingham	934
4	Liverpool	900
5	Bristol	569
6	Oxford	450
7	Cambridge	444
8	Brighton	441
9	Bath	313
10	Leeds	291
11	York	276

Rank	Inbound holiday visits	Trips [000]	% of all trips
1	London	10748	53%
2	Manchester	513	30%
3	Liverpool	353	39%
4	Brighton	228	52%
5	Bath	215	69%
6	Bristol	187	33%
7	York	181	66%
8	Oxford	167	37%
9	Birmingham	145	16%
10	Cambridge	113	25%
11	Newcastle upon Tyne	63	30%

RANKING AMONG ENGLAND TOWNS AND CITIES.

For domestic holidays, North Yorkshire was 4th most visited England county in 2022/2023.

Rank	All domestic overnight trips	Trips [m]
1	Greater London	15.8
2	Greater Manchester	5.3
3	West Midlands	4.5
4	Devon	4.3
5	Cornwall	4.2
6	North Yorkshire	3.7
7	West Yorkshire	3.7
8	Lancashire	3.5
9	Hampshire	3.2
10	Kent	3.1

Rank	Domestic holiday trips	Trips [m]	% of all trips
1	Greater London	4.1	26%
2	Cornwall	2.1	49%
3	Devon	2.1	48%
4	North Yorkshire	1.8	49%
5	Cumbria	1.7	61%
6	Lancashire	1.6	47%
7	Norfolk	1.4	48%
8	Dorset	1.3	48%
9	Greater Manchester	1.1	21%
10	Lincolnshire	1.0	29%

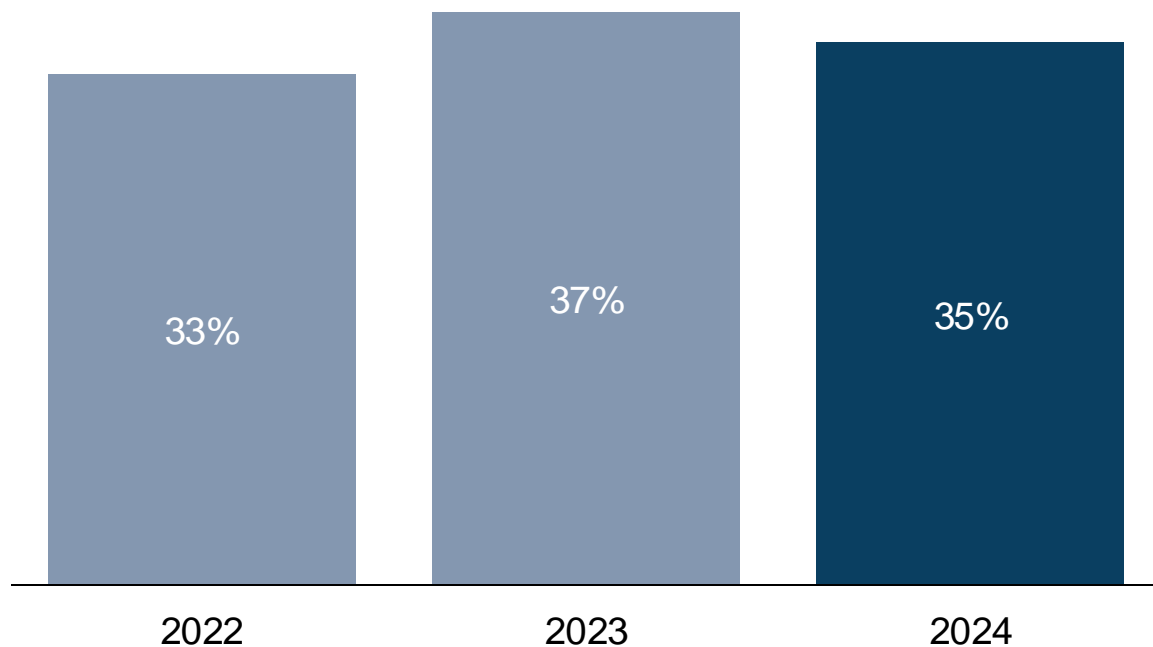
RANKING AMONG ENGLAND COUNTIES.

Source: GBTS: overnight trips 2022 to 2023 (2-year annual average)

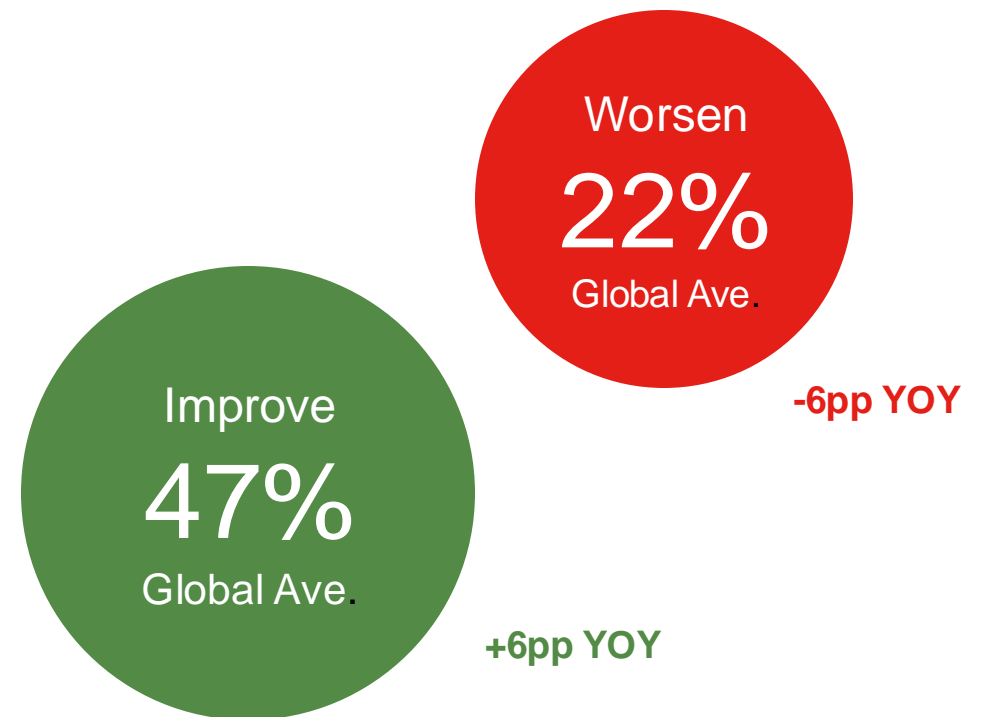
Outlook

Optimism amongst global consumers rises as a result of improved economic outlook

% of consumers globally who consider financial hardship a top-3 risk in the next 5 years

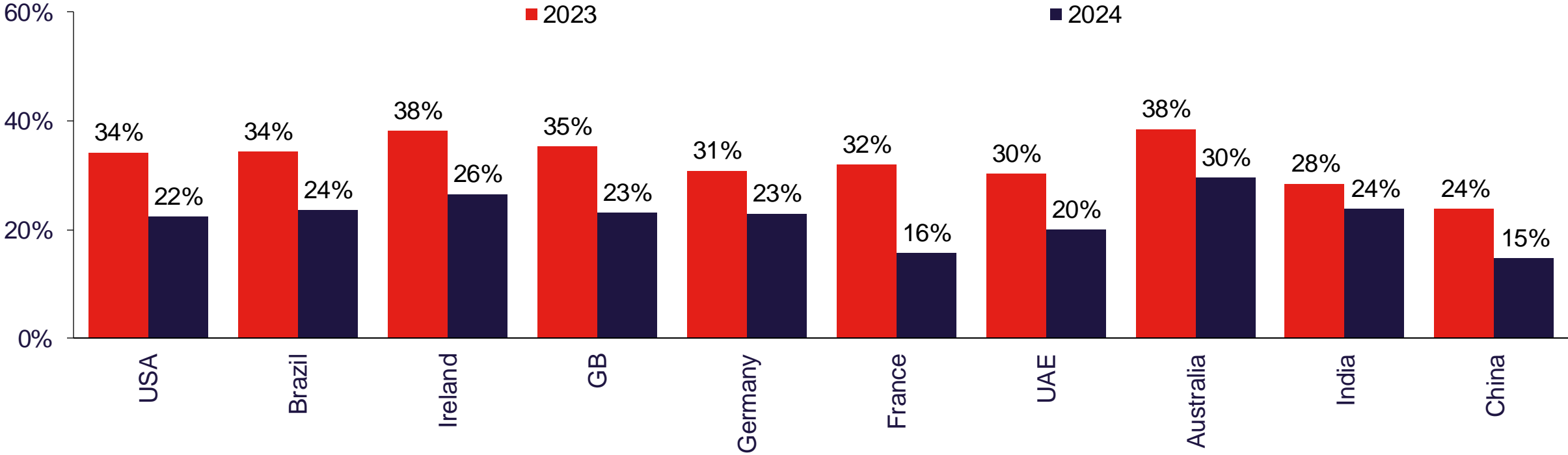


Expectations of the state of one's personal finances in 2024



Notable drop in global consumers putting off big purchases

"Which, if any, of the following are you planning to do in the next 12 months?"
Delay spending on big purchases

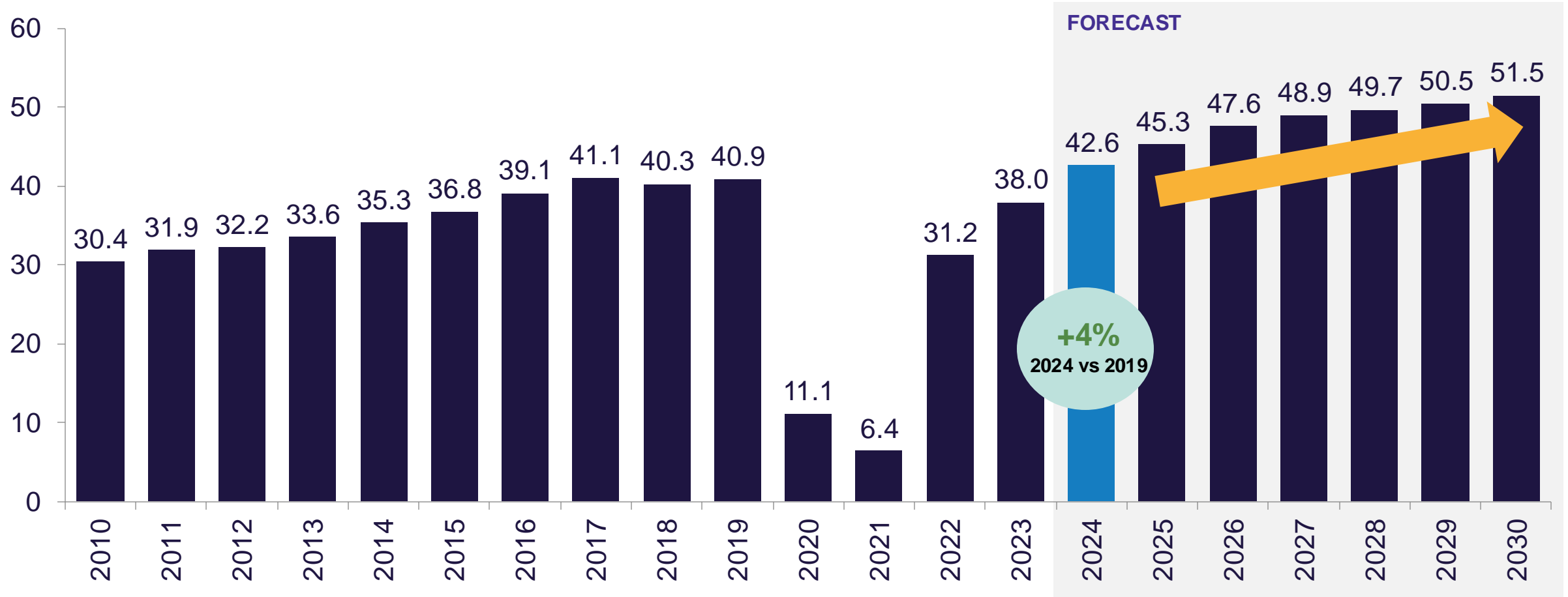


Source: Foresight Factory, 2024 March



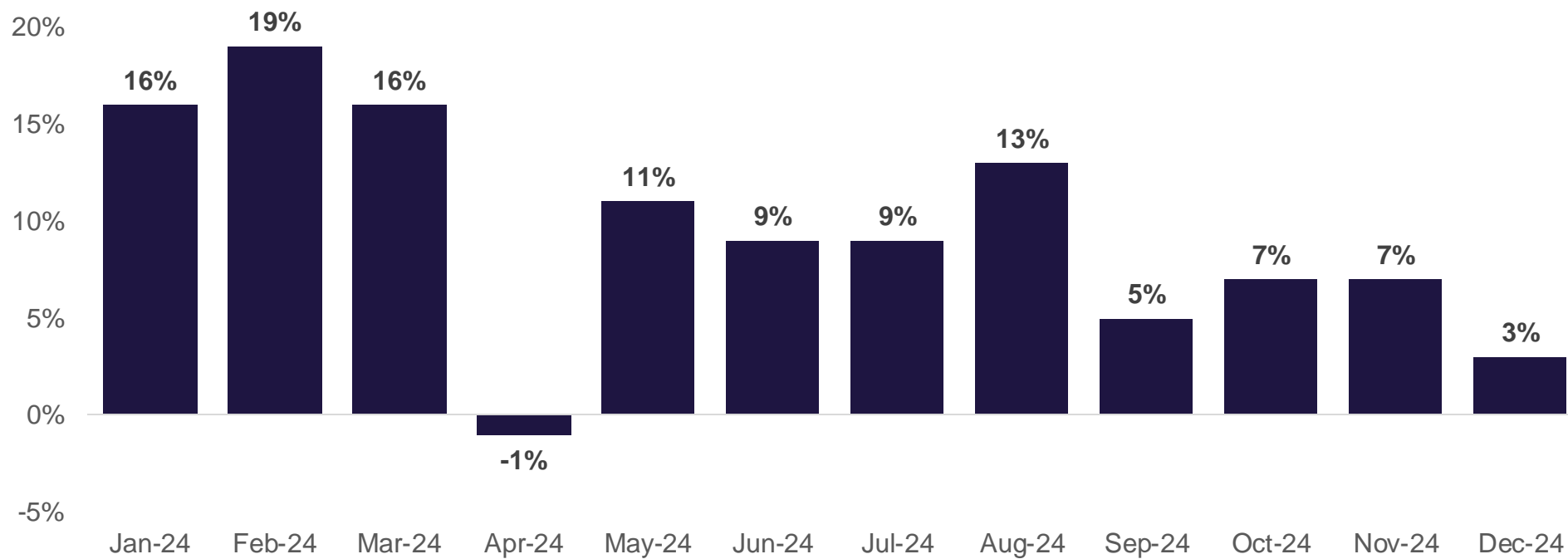
Recovery of inbound visits expected by end of 2024, followed by steady growth up to 2030

Inbound tourism to the UK – visits (millions), trend and forecast



2024 global air arrivals to the UK were above 2023 levels for almost all month.

Global flight arrivals to the United Kingdom in 2024 - year on year comparison



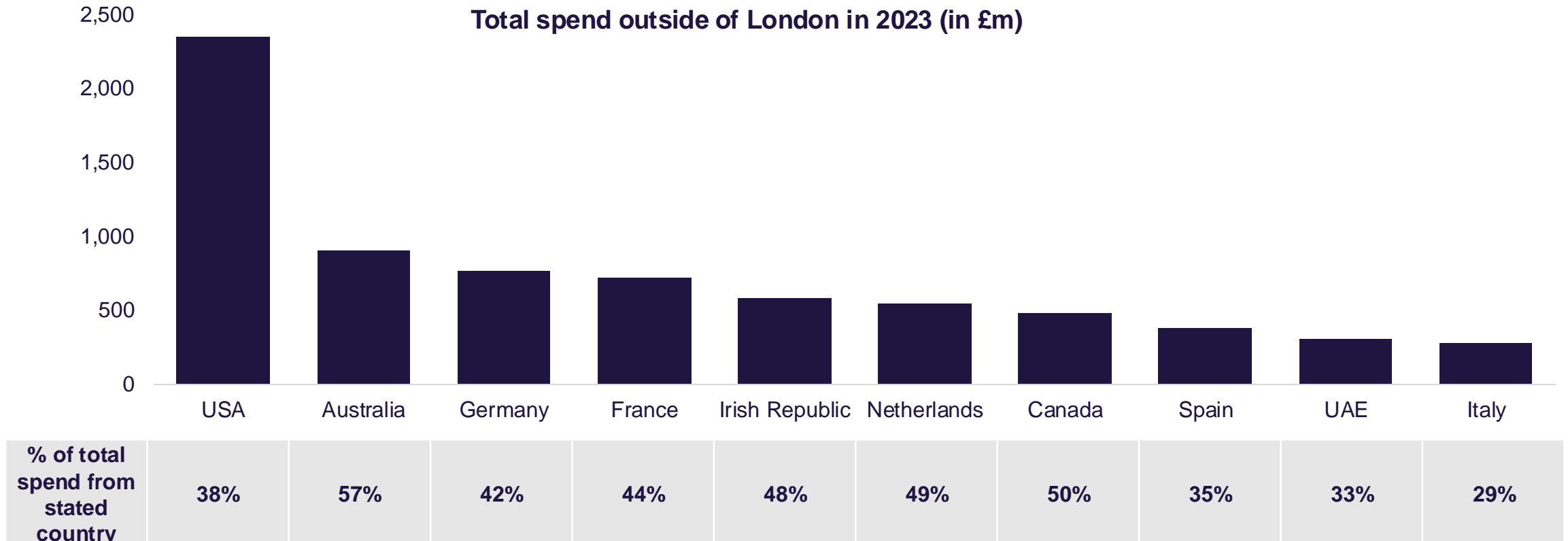
Americas and Oceania were first to return the 2019 volumes, led by with record breaking growths. Inbound tourism from East Asia more sluggish. Majority of short haul markets recovered in 2024.

Ranked by volume	Top Markets 2024	Indexed to 2019
1	USA	119%
2	France	109%
3	Germany	105%
4	Irish Republic	107%
5	Spain	107%
6	Netherlands	109%
7	Italy	89%
8	Poland	112%
9	GCC *	108%
10	Australia	114%
11	Canada	119%

Ranked by volume	Top Markets 2024	Indexed to 2019
12	Switzerland	105%
13	Belgium	79%
14	Romania	98%
15	India	103%
16	Sweden	89%
17	Denmark	99%
18	Norway	102%
19	China	67%
20	Portugal	92%
21	UAE	93%

While some markets bring more visitors, others are more likely to support regional spread.

The top markets for non-London spend



Middle East residents spend most on their holidays in the UK and visits from these markets are expected to rise as ETA replaced the need to apply for a visa.

Top 10 markets with highest spend per trip	Average spend per visit (data from 2018,2019 & 2023, 3-year annual average)
Saudi Arabia	£3,405
Kuwait	£2,859
Qatar	£2,729
Bahrain	£2,532
China	£2,013
Oman	£1,876
United Arab Emirates	£1,857
Nigeria	£1,622
Indonesia	£1,547
Egypt	£1,507

From [27 November 2024](#), eligible [non-Europeans](#) can apply for an [ETA](#) (electronic travel authorisation) and need an **ETA to travel from 8 January 2025**.

ETAs will then extend to eligible **Europeans** from 5 March 2025, who will need an **ETA to travel from 2 April 2025**.

Signals of China's return:

Air flight bookings show a significant post-pandemic rebound in Chinese outbound travel for the Chinese New Year vacation. Solo travellers is an increasing trend, while a group traveller is on decline. (ForwardKeys, January 2025)

Travel trends

Global travel trends impacting the future of travel and tourism

Rise of Smart Tourism:

The increasing use of new tech seeking to make travel more efficient, convenient, accessible and sustainable



Escape the Algorithm:

Demand for human influence driven by over-programmed living



Social Wellness:

Prioritizing positive relationships for holistic wellbeing



Local Allure:

Craving an authentic sense of place – at home and around the world



Back to Nature:

Connecting with the outdoors for healing, community and environmental protection



Leisure Upgrade:

Pursuing purposeful and fulfilling free-time activities



Set-jetting trend: unique for Britain, films, TV programmes and literature are inspirations to visit Britain

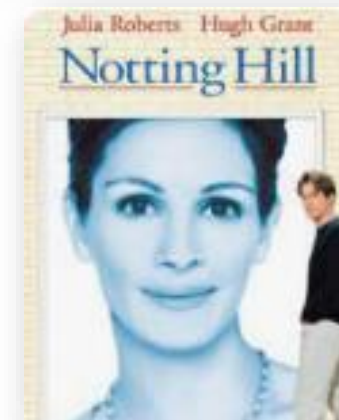
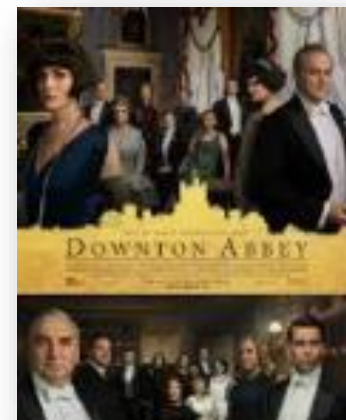
24% visitors to Britain got inspired by movies or tv series (vs 17% other countries destinations)

44% visitors to Britain plan to visit literary, music, film and TV locations (vs 41% of visitors of other countries)



Image: Sky / The Prince's Head

You can visit the Richmond pub featured in 'Ted Lasso'



VisitBritain launching a campaign 'Starring Great Britain' to boost tourism and local economies.

How you can maximise Starring GREAT Britain

- **Use official campaign hashtag #StarringGREATBritain on social media**

Join the conversation and be part of the set-jetting trend. Share your film and TV related experiences on social media, by tagging posts with our official campaign hashtag #StarringGREATBritain. Examples of product to share include filming locations, walking tours, film and TV themed activities or experiences. Using our campaign hashtag allows us to find your posts and potentially like, comment and amplify on the VisitBritain social media channels. Please keep in mind that using the hashtag does not guarantee promotion on our VisitBritain social media pages.

- **Explore our film and TV asset library lightbox**

Our [asset library](#) has a collection of images and video inspired by film and TV locations and genres, free to use for industry to promote film and TV related experiences.

- **Connect with your national tourist board, Local Visitor Economy Partnership Development Partnership to find out more about film and TV inspired you can take part.**

If you are a national supplier and would like to get in contact directly, please email partnerships@visitbritain.org.

- **Consider how and where you can include our campaign call to action "the real star of the show".** This might be on social content end cards, website, press releases etc.

- **Explore and be inspired by our travel trade resources, including itineraries, product and film and TV themed images available on our asset library.**

Later in the campaign a digital movie location map will be available, and assets. To be kept updated with all our opportunities and industry news, [visit our 'Working with us page'](#) for opportunities or subscribe to our fortnightly newsletter for all the details.

['Starring GREAT Britain' campaign | VisitBritain.org](#)

We are putting a spotlight on film and TV-inspired experiences encouraging more visitors to explore the locations for themselves.

Tips to help you maximise film tourism opportunities:

- What's been filmed in your destination or at your business?
- What's trending on Netflix, Prime, Disney Plus etc. or being recognized during Award season? Check the "top 10...", create a "watch list" or build itineraries.
- What stories, products & experiences can you talk about on the back of film and TV and integrate into your tour programmes?
- Think creatively about milestones & anniversaries – how do you lean into these on social or through PR?
- Are you working with your regional screen office?
- What's in production now? Keep an eye on series being commissioned for season 2 and beyond



VisitBritain's campaign 'Starring Great Britain' to boost inbound tourism and local economies.

link to the video

(to be inserted on Wednesday morning)

Thank you

Katerina.Rysova@visitbritain.org



Few links

VisitEngland and VisitBritain Research and Insights: [UK Tourism Industry Statistics & Research | VisitBritain.org](#)
(latest releases, database of reports, data visualisation, dates for upcoming releases)

Inbound research and data: <https://www.visitbritain.org/inbound-research-insights>

Domestic research and data: <https://www.visitbritain.org/england-research-insights>

Domestic Sentiment Tracker: <https://www.visitbritain.org/domestic-sentiment-tracker>

GBTS latest data: <https://www.visitbritain.org/gb-domestic-overnight-tourism-latest-results>

GBDVS latest data: <https://www.visitbritain.org/gb-day-visits-latest-results>

IPS latest data: <https://www.visitbritain.org/node/125646/>

Inbound tourism forecast: <https://www.visitbritain.org/2023-tourism-forecast>

Nation Brand Index (UK's image overseas): [UK Ipsos Nation Brand Index Score \(NBI\) | VisitBritain.org](#)

Annual attractions survey: <https://www.visitbritain.org/annual-survey-visits-visitor-attractions-latest-results>

VisitBritain newsletter for latest updates: https://www.visitbritain.org/newsletter_signup

Business Advice Hub: <https://www.visitbritain.org/business-advice>

Perceptions of the UK (Nation Brands Index 2024)

- The results paint a detailed picture of how the UK is perceived internationally.
- Conducted in **July and August 2024**.
- An annual study amongst **40,000 consumers in 20 panel countries around the world**
- Consumers **score 50 nations** on a range of attributes and statements grouped in 6 dimensions:
 - Tourism, Culture, People, Exports, Governance, Immigration/ investments

Hexagon dimension / attribute	UK rank in 2024	Change vs 2023
TOURISM	6	0
Rich in historic buildings & monuments	5	0
Vibrant city life & urban attractions	5	0
Would like to visit if money was no object	10	↓ 3
Rich in natural beauty	23	↑ 4
CULTURE	5	↓ 1
Interesting & exciting for contemporary culture	4	0
Excels at sport	5	0
Has a rich cultural heritage	6	0
PEOPLE	10	0
If visited, people would make me feel very welcome	18	↑ 1
Would like a person from country as a close friend	7	↓ 3
Would employ well-qualified person from country	7	↓ 2

UK ranking for key attributes by market

Dimension / Attributes UK ranks in 2024 by market	Total	Argentina	Australia	Brazil	Canada	China	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	Saudi Arabia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States
OVERALL NBI	5	10	5	8	3	8	10	15	3	4	4	11	10	30	16	1	4	6	9	1	6
TOURISM	6	13	7	13	4	8	9	14	3	5	8	11	14	32	14	3	6	6	8	1	9
Is rich in historic buildings and monuments	5	10	4	10	2	5	5	8	3	6	6	10	7	11	12	2	6	5	4	1	6
Has a vibrant city life and urban attractions	5	8	5	7	4	7	5	4	5	4	3	9	7	15	12	2	3	4	10	1	7
Would like to visit if money was no object	10	23	10	12	8	15	21	20	5	10	10	10	22	37	20	2	11	9	16	1	6
Is rich in natural beauty	23	31	16	27	21	9	26	29	12	31	21	25	38	46	26	12	21	25	15	6	24
CULTURE	5	8	2	9	5	4	4	3	5	2	5	9	5	11	11	4	4	4	6	1	7
Interesting & exciting contemporary culture	4	6	3	7	5	6	4	3	4	3	5	6	5	9	11	3	5	4	6	1	5
Excels at sport	5	9	3	10	6	7	5	4	3	3	5	10	7	14	11	9	2	6	9	2	8
Has a rich cultural heritage	6	10	5	11	4	4	6	9	12	7	6	12	8	13	16	16	6	10	5	1	10
PEOPLE	10	27	6	9	6	19	23	19	4	14	9	18	19	44	30	2	5	9	16	1	8
If visited, people would make me feel very welcome	18	33	11	11	8	32	23	22	9	18	11	24	28	45	40	3	11	10	32	8	9
RANK FOR FAVOURABILITY	7	14	7	13	13	13	21	20	4	15	9	11	19	37	10	2	8	9	13	1	4
RANK FOR FAMILIARITY	3	13	4	15	4	5	4	8	4	5	7	12	8	9	7	4	6	5	12	1	4

Source: Anholt Nation Brands Index 2024. Ranking is out of 50 nations and the Total rank is based on the 20 standard NBI markets.