Market Insights Briefing

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VAC October 2026

A view of The Grand Pier at Weston-Super-Mare, Somerset, from the beach at sunset with the tide out. ©Visit Bristol/Frank Beaumier

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Inbound performance and prospects

Mother and son looking at a the Bayeux Tapestry at Reading Museum, in Berkshire
©REDA/Visit Reading

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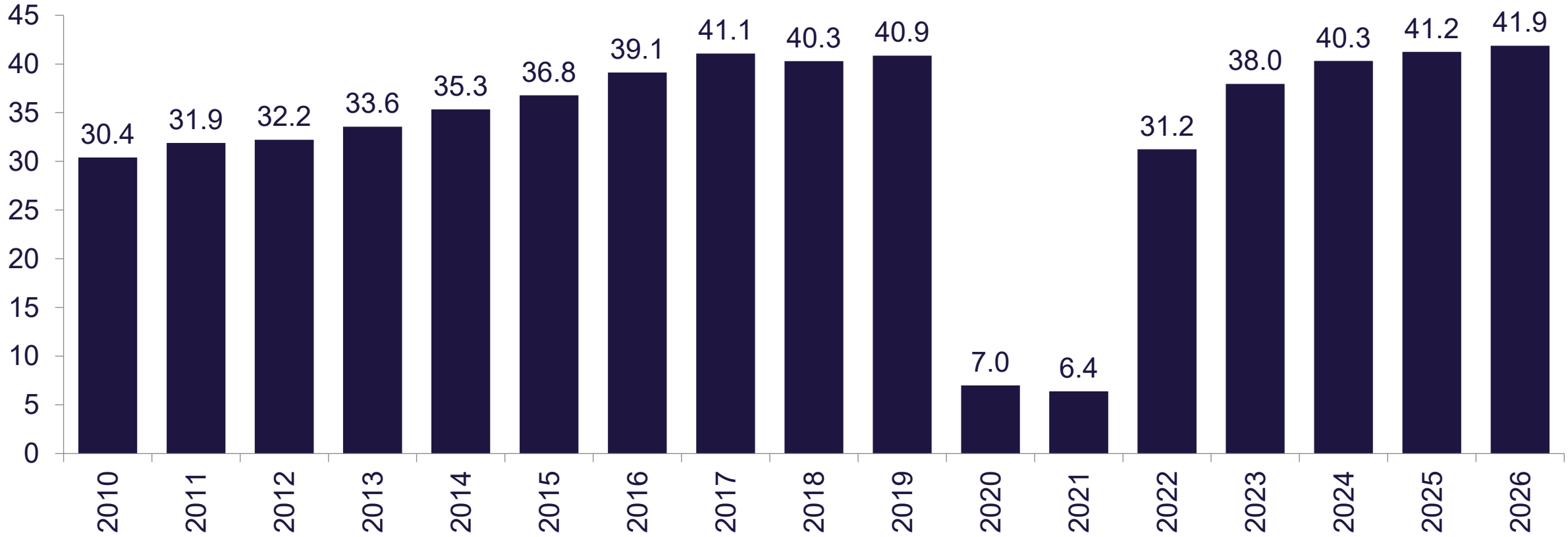
Inbound visits forecast to grow 2% in 2026

Inbound tourism to the UK – visits (millions)



Source: International Passenger Survey to 2023; VisitBritain model and forecasts for 2024-6. NB data for 2024 and onwards shown here does not align with published IPS figures as it is modelled to be consistent with previous years.

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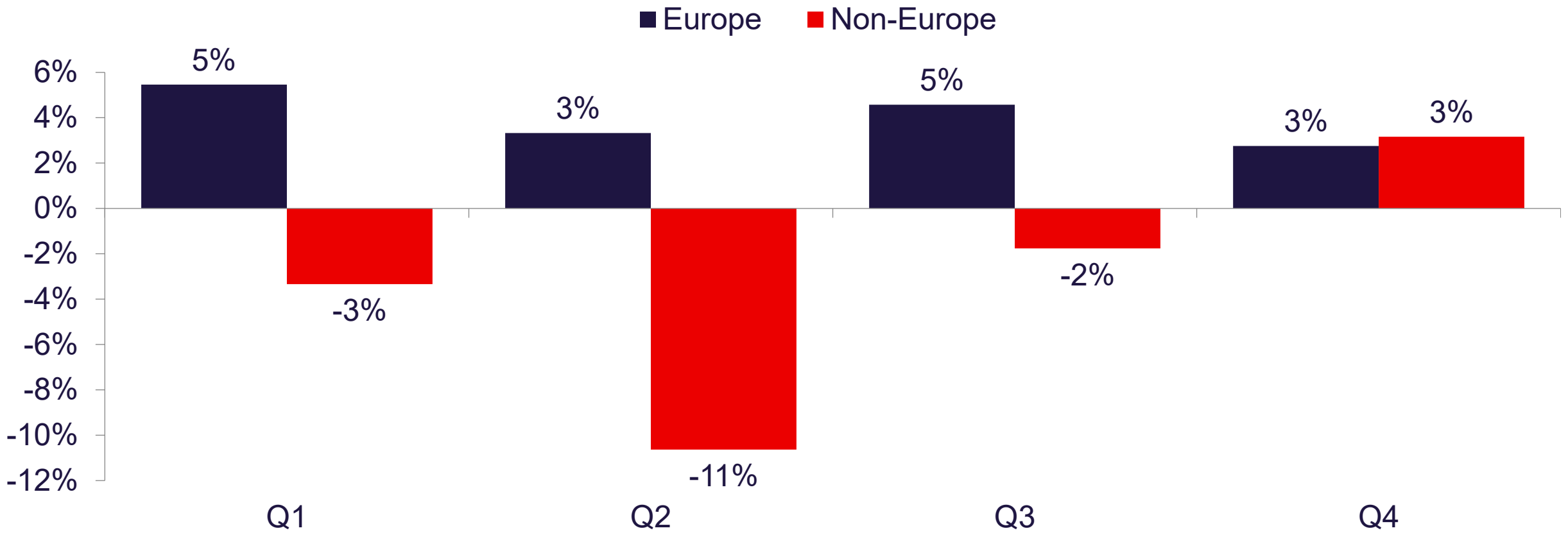
Inbound spend 19% up on 2019 in 2026 but still 10% below in real terms. 2% growth forecast for 2026.

Inbound visitor spending in the UK (billions) – long term trend and forecast

Source: International Passenger Survey to 2023; VisitBritain model and forecasts for 2024-6 (although 2024 is almost identical to published ONS data)

Steady growth from Europe this year, but not from long haul markets

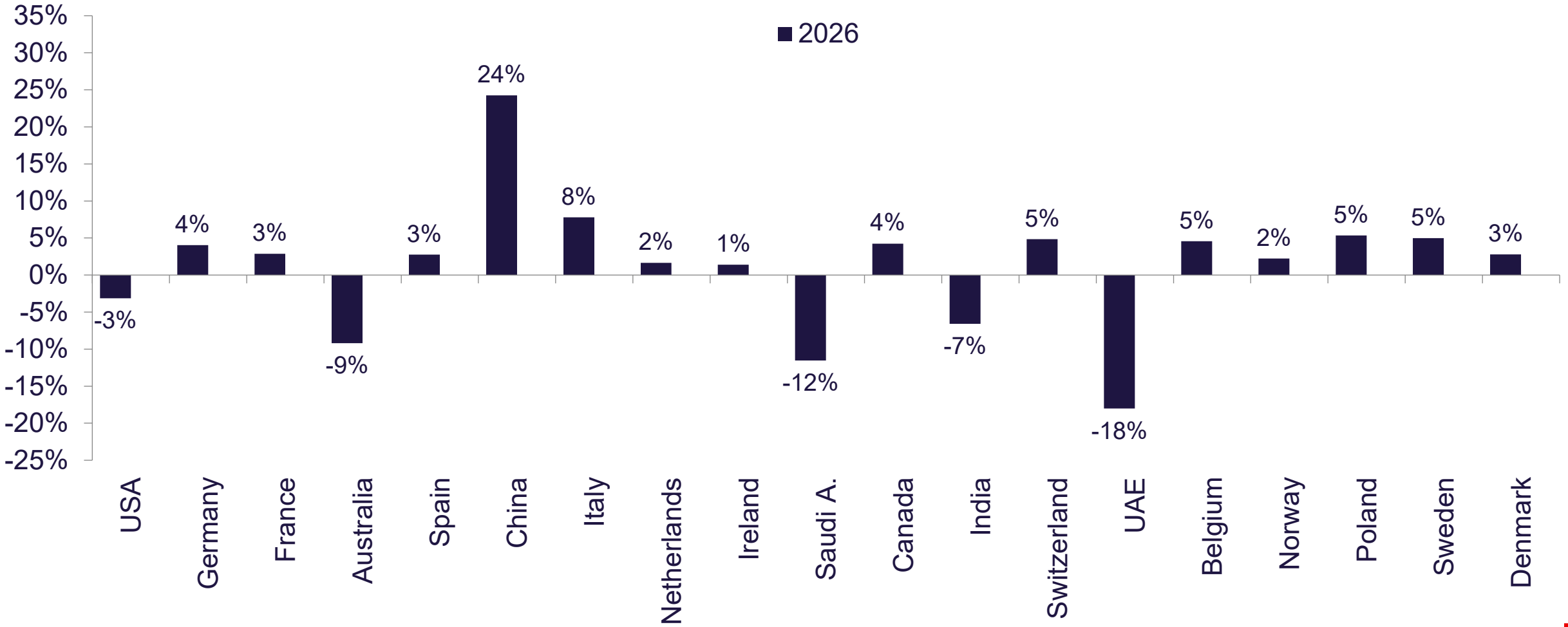
Estimated year-on-year growth in inbound visits in 2026, by quarter



Source: VisitBritain estimates based on several data sources

A challenging year from some (not all) Asian markets

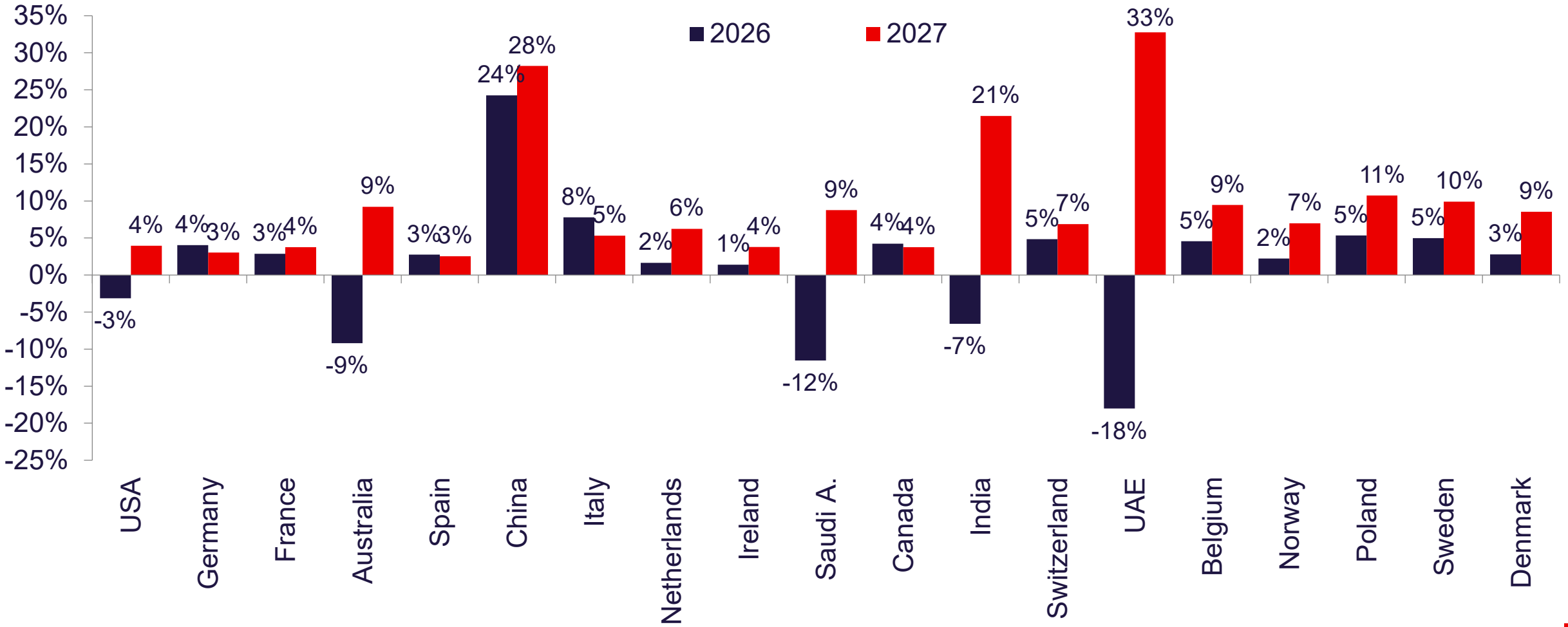
Year on year growth in inbound visits by market (ranked left to right by value of inbound spend)



Source: Oxford Economics, July 2026. Ranking is by inbound spend forecast for 2027.

But a bounceback could be on the cards for 2027

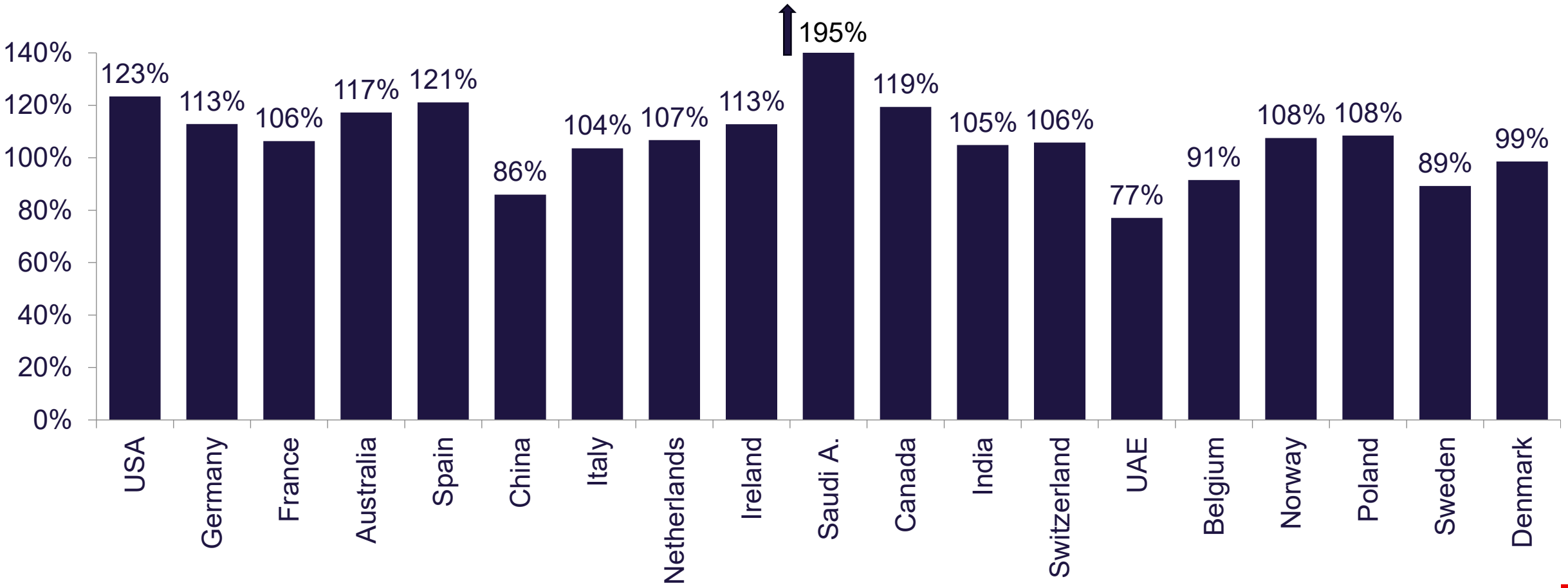
Year on year growth in inbound visits by market (ranked left to right by value of inbound spend)



Source: Oxford Economics, July 2026. Ranking is by inbound spend forecast for 2027.

Visits from US and Saudi are well up on pre-COVID

Inbound visits indexed to 2019, by market (ranked left to right by value of inbound spend)



Source: Oxford Economics, July 2026. Ranking is by inbound spend forecast for 2027.

Inbound performance and prospects

- Inbound from Gulf, India, Australia markets disrupted this year
- However, visits from Europe are growing (though they tend to spend less per visit on average)
- Recent flight bookings have been much more positive – hoping for a return to growth for long haul by the end of the year
- Scotland and Northern England outperforming other areas of Britain in growth terms this year
- Global economic conditions are challenging: inflation putting pressure on traveller budgets and jet fuel prices on travel costs
- UK has lost share this year, but we could see a bounceback next year, geopolitical conditions permitting
- For more on market performance, regional/seasonal spread please see our website (Visa card spending data)

Domestic performance and prospects

Three people looking at surrounding countryside view on a forest walking path in Sutton Bank, North Yorkshire © VisitBritain/NYMNPA/Ula Blocksage

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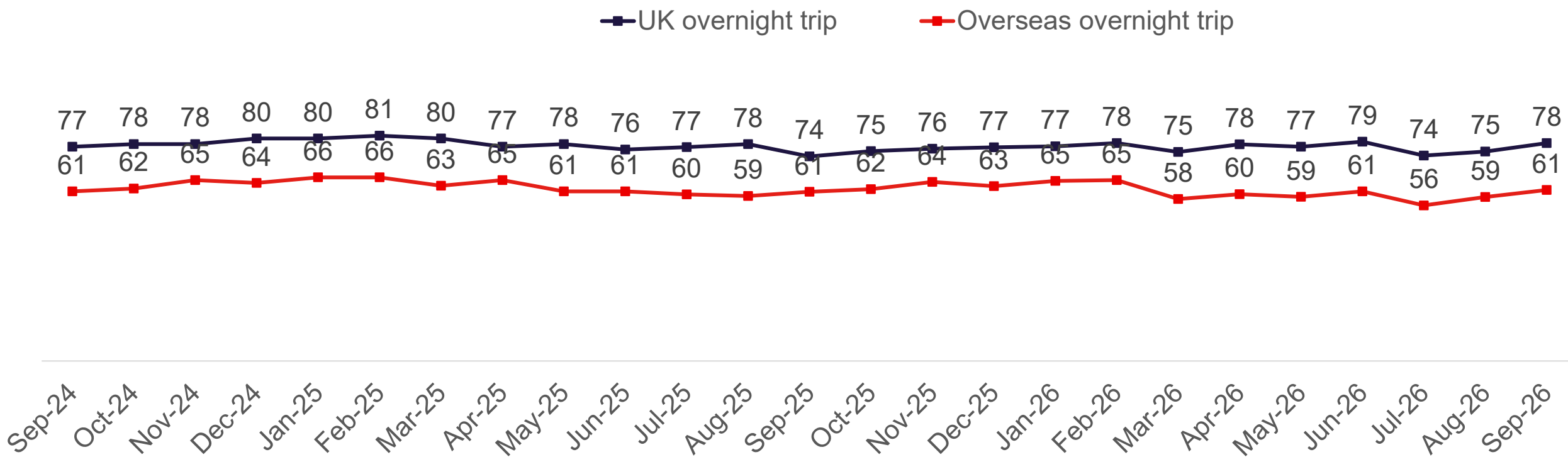
Domestic intentions have recovered after lower levels in July/August (and are up on last year too)

Proportion anticipating going on any overnight trips in the next 12 months



"Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? And when else do you anticipate going on an overseas holiday or short break?"

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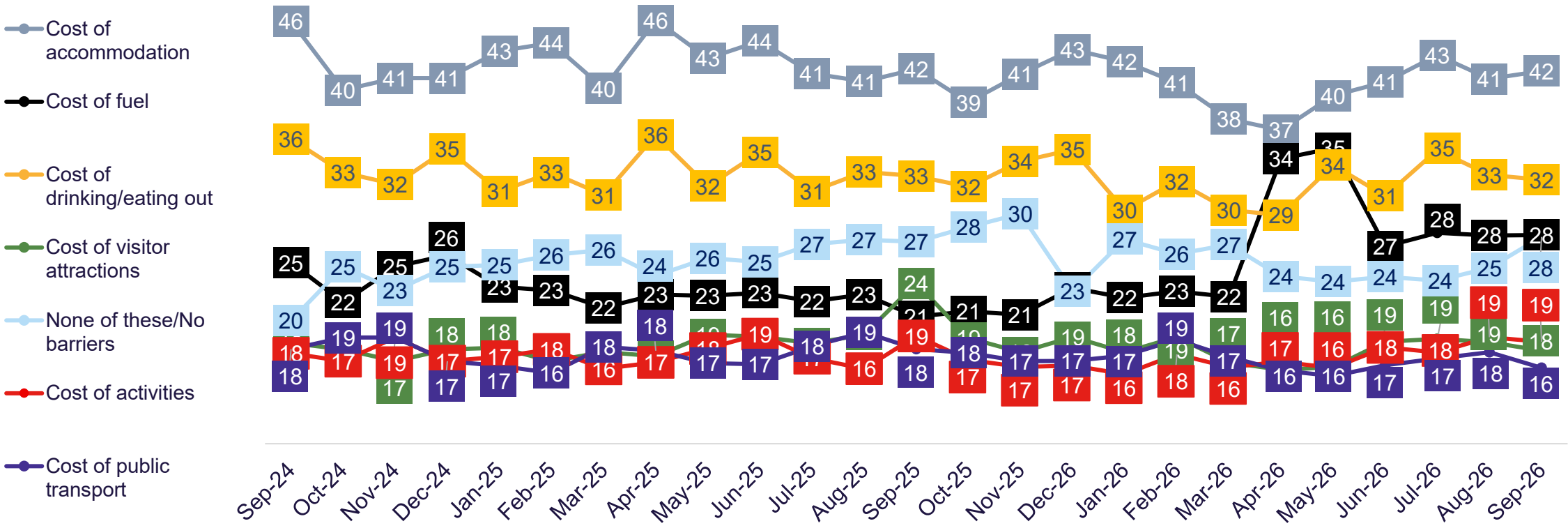
Cost of accommodation has been the main barrier, although we have seen some spikes from the cost of fuel too

Individual costs barrier to taking UK holidays and short breaks, Percentage



"Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?"
Base: September 2026

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Domestic performance and prospects

- Recent performance appears to be steady: similar to, or slightly up on, early 2025.
- The value of Visa card spending on overnight trips was 2% up year-on-year in the first half of the year. Spending has grown fastest in Northern England and the Midlands. Industry data suggests moderate growth in the leisure and hospitality sectors.
- Domestic holiday intentions picked up in September after a couple of slightly sluggish months. Outbound intentions are level with last year; also 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.
- Inflationary pressures are clouding prospects, although consumer confidence is still holding up for now. Petrol prices have continued to rise.

Further resources

A view of The Grand Pier at Weston-Super-Mare, Somerset, from the beach at sunset with the tide out. ©Visit Bristol/Frank Beaumier

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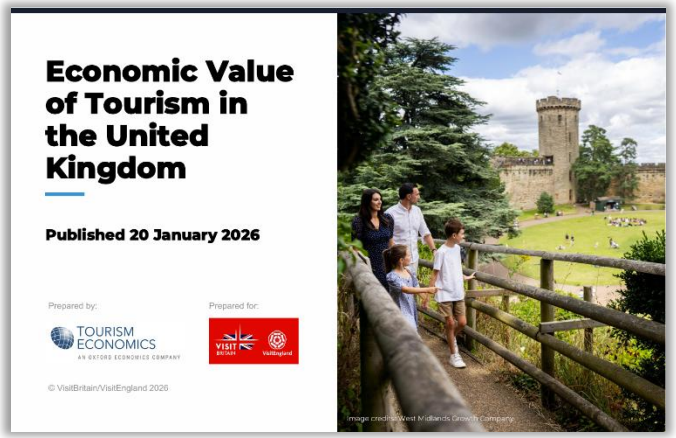
What's new & upcoming?

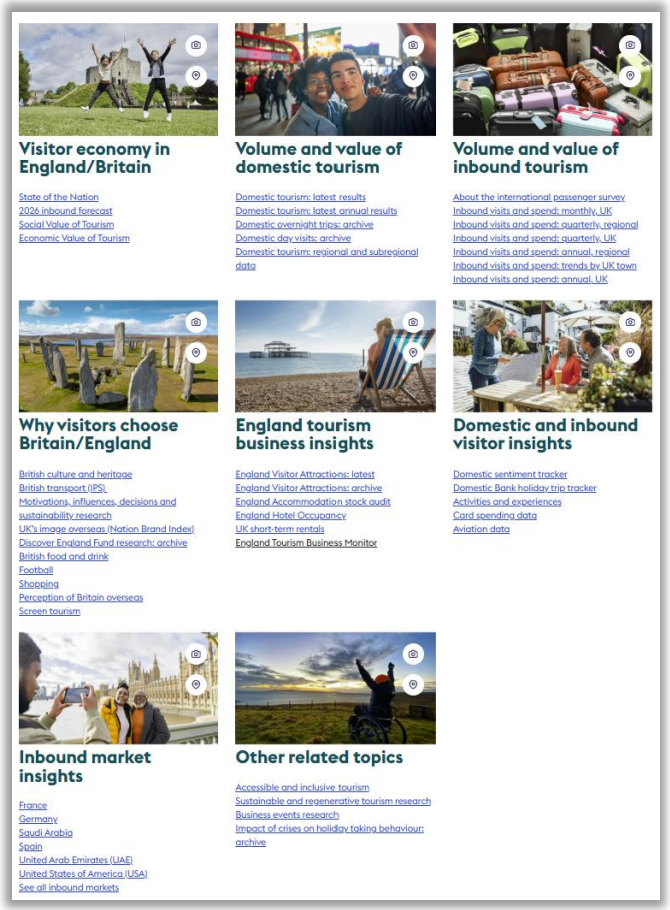
- **Released this year:**
  - Economic Value of Tourism
  - Domestic card spending data
  - Film and TV tourism as a driver of visiting the UK
  - Sustainable travel among international travellers
  - Accommodation Stock Audit
  - Domestic travel pre vs post pandemic
- **Coming up:**
  - Mosaic – how to drive growth in inbound spend across the nations and regions of Britain
  - Domestic segmentation insights
  - Nation Brands Index – perceptions of the UK internationally
  - Drivers and barriers to visiting Britain, and drivers of feeling welcome
  - "All In" research on disabled audience
  - Future consumer trends



UK Tourism Industry Statistics & Research | VisitBritain.org

Explore more on our website!

Explore more in the reports, datasheets and interactive data visualisations on our website



Visitor economy in England/Britain

State of the Nation
2026 inbound forecast
Social Value of Tourism
Economic Value of Tourism

Volume and value of domestic tourism

Domestic tourism: latest results
Domestic tourism: latest annual results
Domestic overnight trips: archive
Domestic day visits: archive
Domestic tourism: regional and subregional data

Volume and value of inbound tourism

About the international passenger survey
Inbound visits and spend: monthly, UK
Inbound visits and spend: quarterly, regional
Inbound visits and spend: quarterly, UK
Inbound visits and spend: annual, regional
Inbound visits and spend: trends by UK town
Inbound visits and spend: annual, UK

Why visitors choose Britain/England

British culture and heritage
British transport (IPS)
Motivations, influences, decisions and sustainability research
UK's image overseas (Nation Brand Index)
Discover England Fund research: archive
British food and drink
Football
Shopping
Perception of Britain overseas
Screen tourism

England tourism business insights

England Visitor Attractions: latest
England Visitor Attractions: archive
England Accommodation stock audit
England Hotel Occupancy
UK short-term rentals
England Tourism Business Monitor

Domestic and inbound visitor insights

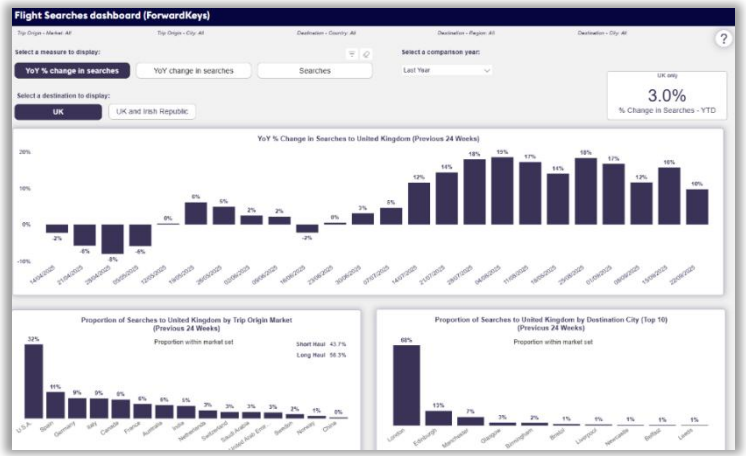
Domestic sentiment tracker
Domestic Bank holiday trip tracker
Activities and experiences
Card spending data
Aviation data

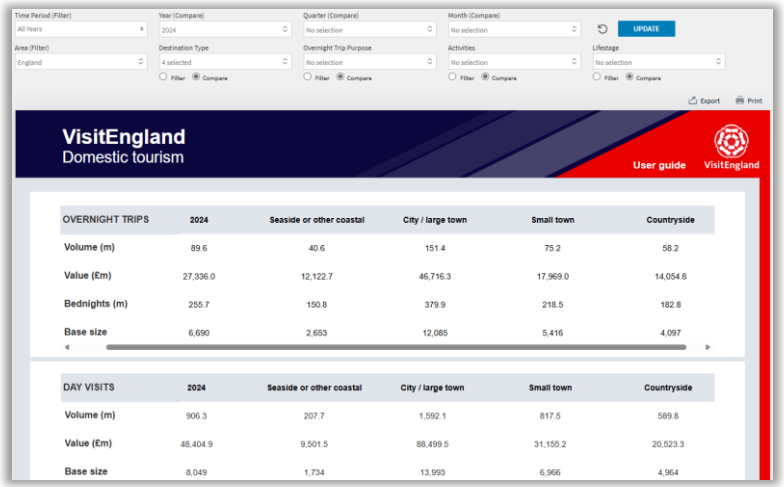
Inbound market insights

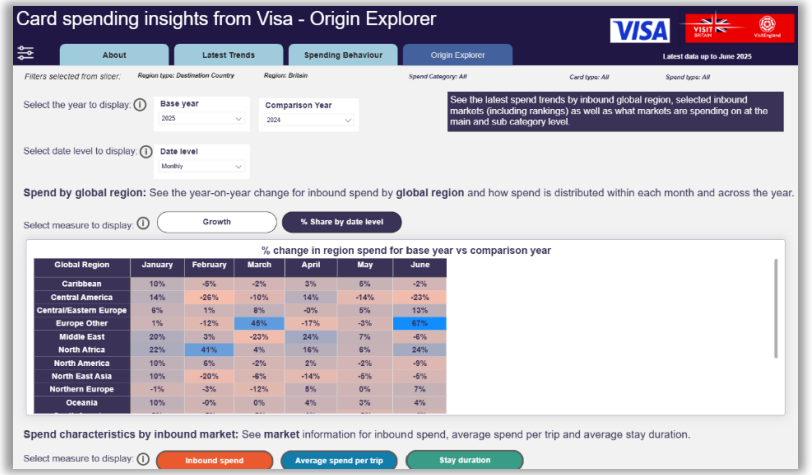
France
Germany
Saudi Arabia
Spain
United Arab Emirates (UAE)
United States of America (USA)
See all inbound markets

Other related topics

Accessible and inclusive tourism
Sustainable and regenerative tourism research
Business events research
Impact of crises on holiday taking behaviour: archive







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