

# Card spending insights from Visa

Inbound visitors to Britain

August 2024

VisitBritain/VisitEngland Research



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# Card spending trends in 2023 | Key insights

- Total spend and card count **grew year on year** in 2023 above rates of inflation. Britain was ranked 2<sup>nd</sup> in the competitor set for total spend and has maintained its share.
- Spending **behaviour appears to be shifting** as the effects of the COVID-19 pandemic recede. In 2023, inbound visitors made more frequent, smaller purchases, and displayed lower spend per visit and length of stay compared to 2022.
- Almost a third of in-person inbound card spend in 2023 was in **retail**, and over a quarter in **restaurants/nightlife**. There was a lot of variation in spending patterns by market and region. What inbound travellers spent their money on **also evolved in the post-COVID period**, with eating out, nightlife and hotels taking greater share of spend, but retail spend becoming less prominent, as more typical tourism behaviour has resumed.
- The **top sources** of inbound spend in 2023 were the USA, Irish Republic, France, Saudi Arabia, and Australia. Inbound spend in 2023 was most likely to go to Southern England, with **Greater London taking the lion's share**, followed by Scotland, Northern England, the Midlands, and then Wales.

# Card spending trends in 2023 | Comparison with the International Passenger Survey

As the official measure of inbound tourism to the UK, it is extremely valuable to be able to compare new insights from card spending data with the IPS. This process allows us to validate trends in the card spending data, strengthen our holistic understanding of inbound travellers by drawing from both sources, and tease out methodological differences that we should remain aware of.

- Looking at the topline figures, card spending data **saw more growth** in inbound spend between 2022 and 2023 compared with the IPS (19% in real terms vs. 9% in real terms). This was similar **when looking at card count** (which can be compared to visits), which grew by 28% year on year compared to the IPS's 21%. However, a very similar seasonal trend was seen, with growth concentrated in January and February due to a slow start to 2022 at the tail end of the COVID-19 pandemic.
- When it comes to spend characteristics, year on year change in the **average spend per trip** in 2023 was very similar across both sources; decreasing by 2% (card spending data) and 3% (IPS) year on year. Average spend per trip from Visa cards is significantly lower vs. IPS, likely indicating that the IPS can **track additional spending** which takes place either using other cards, with cash withdrawn before arriving in Britain, or online purchases.
- **Top spending origin markets** in 2023 were similar across both sources, with GCC markets performing particularly well, although Irish Republic comes higher in Visa data, and Germany lower. NB market ranking will be affected by differences in Visa card penetration vs other payment methods. Long haul markets stay the longest on average across both sources. **Average length of stay is longer** from Visa card data compared to what is seen in IPS, as the two measures are defined differently (in the card spending data, this is defined based on the dates and times of the first and last transaction in Britain, whereas IPS is restricted to the number of nights included in the trip).
- The spread of spend from inbound visitors **across the destinations of Britain** in 2023 has some differences when comparing both sources, with London taking the majority of inbound spend (60% in card spending data vs. 54% in IPS), followed by Southern England, Scotland, Northern England, the Midlands, and Wales. Share of spend from card spending data is more concentrated in London and Southern England, perhaps reflecting **differing traveller behaviour** among Visa card users vs. inbound visitors as a whole.

# About this data (1)

Analysis in this article is based on aggregated and anonymised data on UK card payments provided by Visa Europe Limited. Visa operate a card scheme that is used by a variety of card issuers, including debit and credit card providers. Visa operates one of the world's largest payment networks, and respecting privacy is crucial. Visa has a Global Privacy Program to ensure proper safeguards are applied to personal information that they collect, use and share. Visa aggregate and anonymise data before sharing to remove information that would allow VisitBritain/VisitEngland to identify the activity of an individual or business within the data set.

Card spending covers part of UK spending habits and is not exhaustive. It will not cover cash paid transactions or direct debit payments. In 2022, 59% of payment transactions in the UK were made using cards, 14% using cash and 10% using direct debit according to UK Finance's [Payment markets summary \(PDF, 826KB\)](#). These figures reflect the number of transactions made and would differ if looking at the value of payments. The value spent on cards is lower as a proportion of these types of transaction due to large value payments such as salaries, mortgages and bills usually being paid via direct debit and faster payments. Overall, UK credit and debit card holders made 2.5 billion purchase transactions in June 2023 totalling £84 billion, as explained in UK Finance's [Card spending update for June 2023 \(PDF, 226KB\)](#).

# About this data (2)

## *Definition of key metrics:*

- **Spend amount** refers to the total spend taking place in an area for a selected period of time.
- **Card count** refers to the total unique Visa cards used in transactions within an area for a selected period of time
- **Transaction count** refers to the total transactions taken place in an area for a selected period of time.
- **Average spend per transaction** is calculated by dividing total spend by transaction count.
- **Average stay duration** and **average spend per trip** are calculated based on identifying 'trips' where travellers made purchases outside their residence for a period of two days or more. Stay duration is based on the dates of first and last transactions in Britain.

This report focuses on the card spending of inbound visitors to Britain from 2021 to 2023. An 'inbound visitor' is defined as a cardholder of an international Visa card, who has made purchases within Britain. International cardholders who make purchases in Britain for a period of 3 months or more are excluded as 'international residents'.

## *Additional notes on this data:*

- Trends are reflective of Visa cardholders, not the total spend which takes place in the UK. Visa's global market share was reported as 39% by Nilson in 2022, with European and UK coverage said to be generally higher, however we can expect this to vary by market.
- Data is based on in-person spend only, i.e. card transactions taking place within businesses in person, as well as cash withdrawn from cash machines. Online spend is not included.
- More details on the strengths and limitations of this type of data have been [outlined by the ONS](#) who first published analysis of card spending data in [November 2023](#).

*Please do not re-publish data from this report on any public platform, including combining the data with that from other sources, before contacting VisitBritain/VisitEngland for approval.*

# Upcoming planned data releases

This report, an in depth look at the card spending of inbound visitors to Britain from 2021 to 2023, is the first in a series of releases we plan to make sharing insights from this data. Data has been processed by Visa in batches before being released to us, with inbound data from 2021 to 2023 being available first, and domestic data, as well as data for the years of 2019 and 2024, taking longer to be released.

## Current plans include:

- An interactive dashboard, currently in development, to ultimately include both domestic and inbound data across 2019, 2021, 2022, 2023 and up to the most recent month in 2024. The dashboard will give users the option to view the latest trends in detail based on which data points they are most interested in (including detailed trends for each UK destination).
- A domestic deep dive report, focussing on trends in domestic spending in 2019, 2021, 2022, 2023 and up to the most recent month in 2024.
- A shorter report to be released monthly, covering trends for the latest month in both domestic and inbound spending, including comparisons to the same month in previous years.

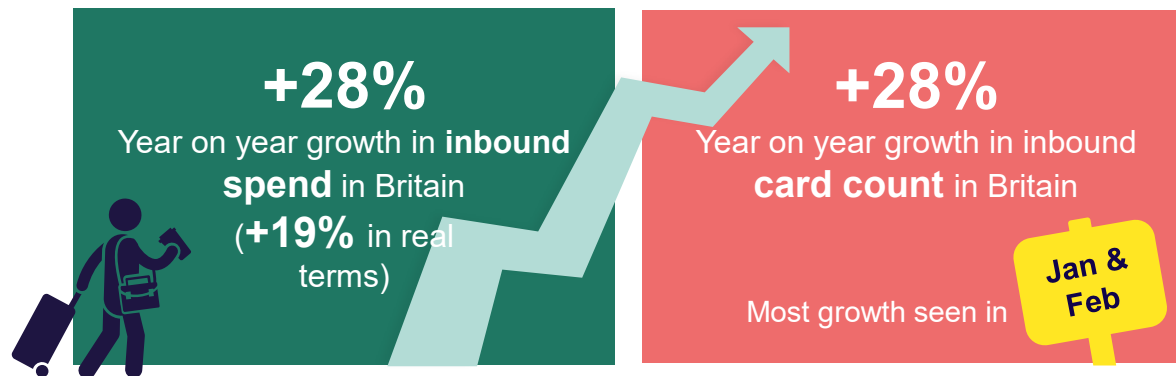
# Latest trends



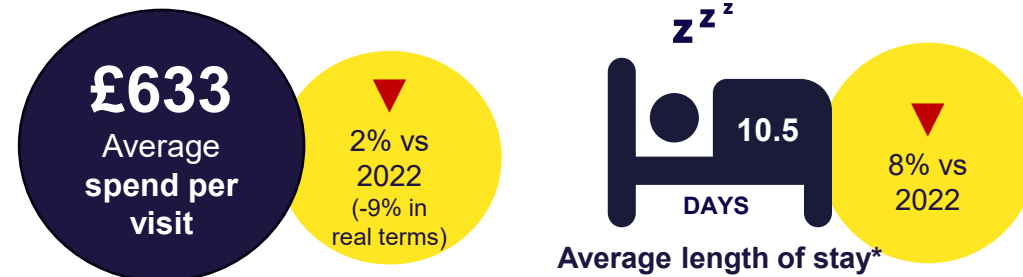


# Latest trends | 2023 insight summary

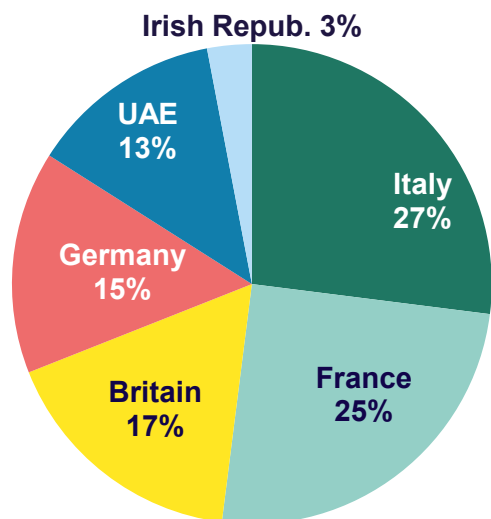
## Key metrics



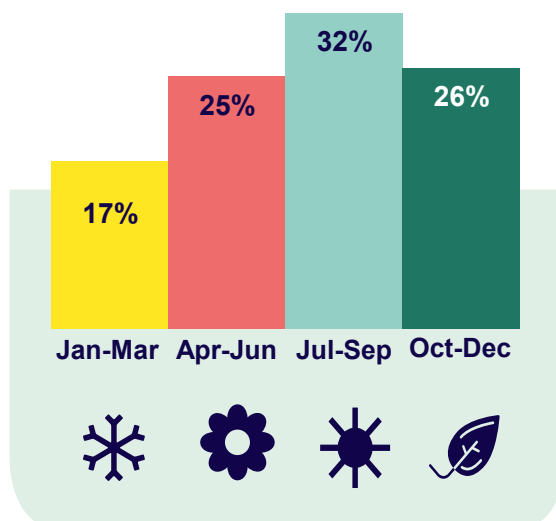
## Spend characteristics



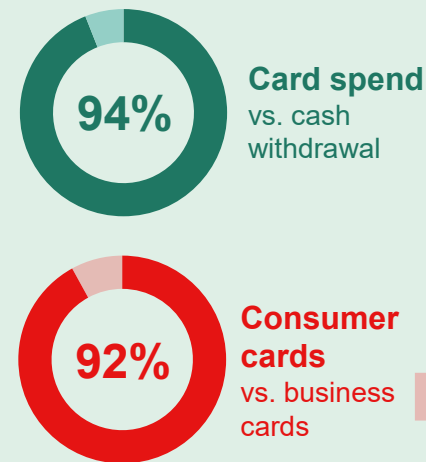
## Spend share vs. selected competitors



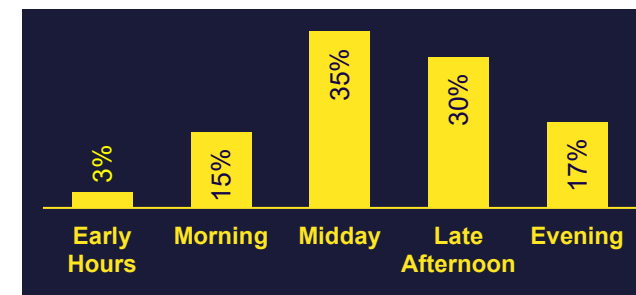
## Seasonal spread of spend



## Spend types



## Spend by time of day\*\*



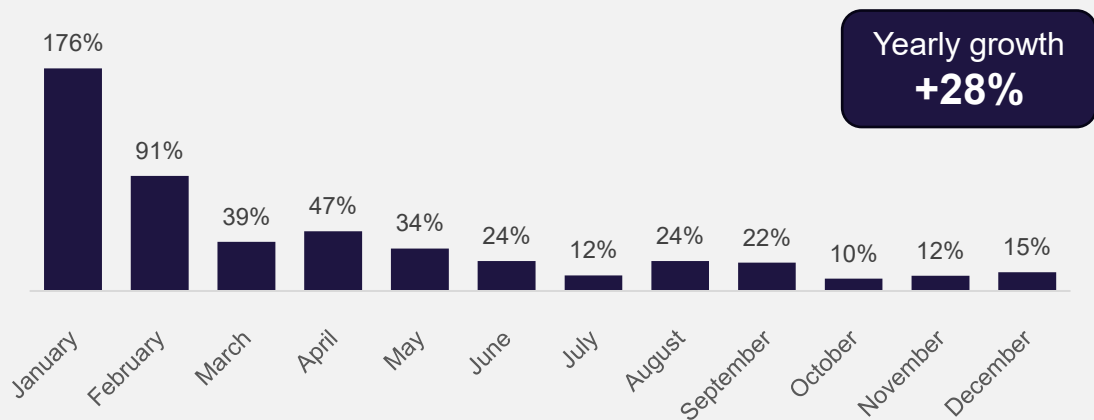
## Business card users

- Spend more per transaction and per trip
- Make fewer transactions per card
- Make shorter trips in Britain

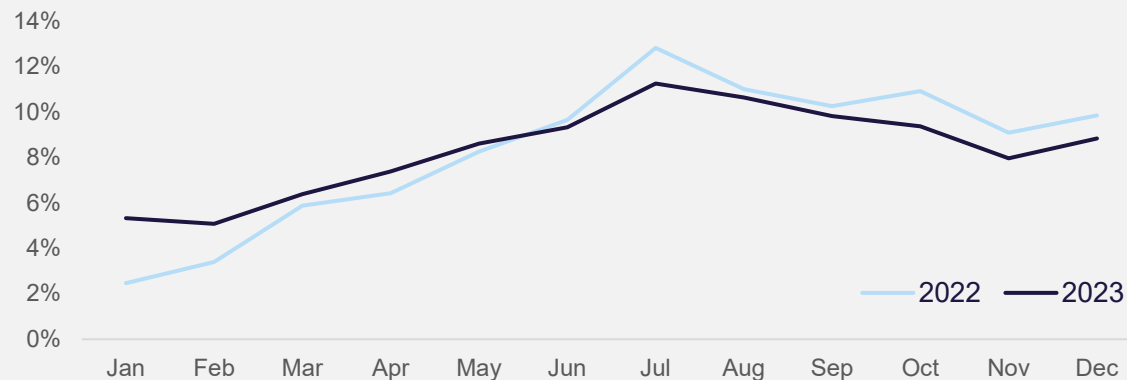
Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included. \*This is defined based on the dates and times of first and last transaction in Britain, so may differ from full length of stay. All values and percentage changes in spend are in nominal terms unless otherwise specified. \*\*Early hours = midnight to 4.59am, morning = 5am to 10.59am, midday = 11am to 2.59pm, late afternoon = 3pm to 6.59pm, evening = 7pm to 11.59pm

# Total spend | Strong year on year growth, with seasonal trends affected by a slow start to 2022 at the tail end of the pandemic

Percentage change in inbound spend (2023 vs. 2022)



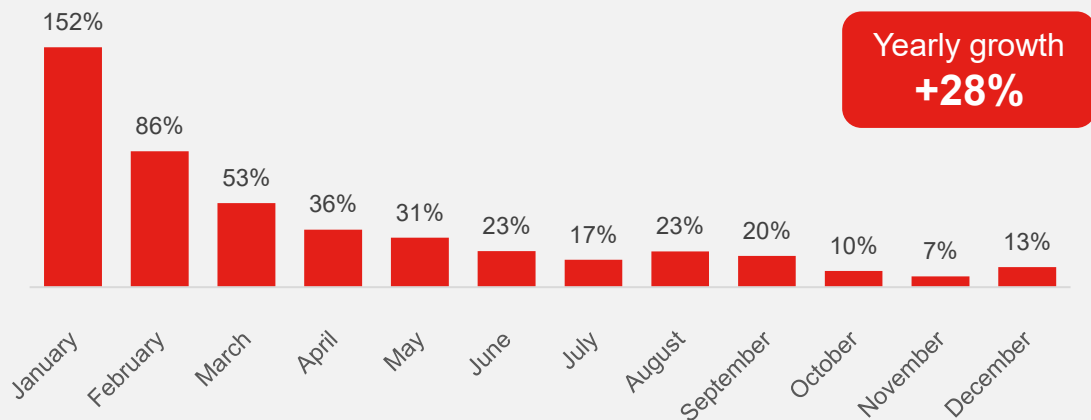
Annual spend distribution across months



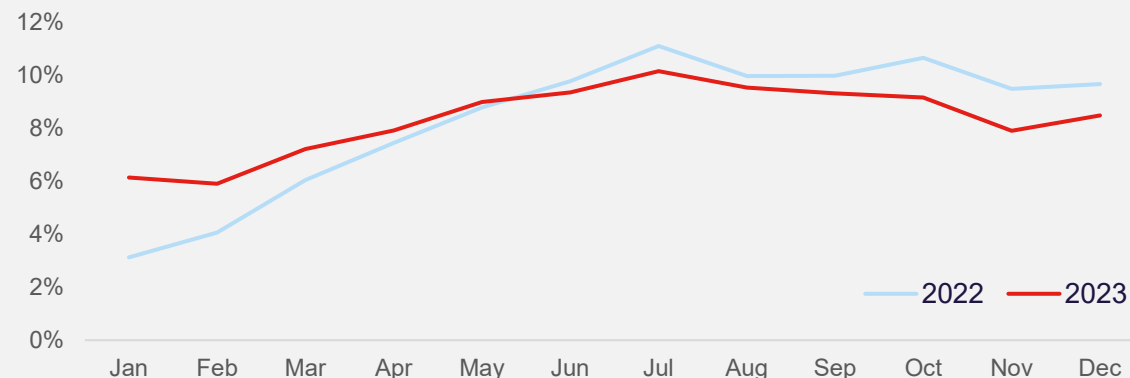
- In 2023, Britain saw a 28% year on year increase in spend from inbound visitors (19% in real terms). In the same time period, the International Passenger Survey saw spend grow by a lower rate of 17% year on year (9% in real terms). Monthly year on year growth (i.e. vs. the same month in the previous year) was uneven throughout the year; most concentrated in January and February, due to particularly low spend seen in early 2022 at the tail end of the COVID-19 pandemic. A similar trend can be seen from monthly International Passenger Survey data. Inbound spend from IPS grew by 200% year on year in January 2023, and by 76% in February.
- Inbound spend follows a familiar seasonal pattern; peaking in the third quarter, before declining into Q4 with a boost in the pre-Christmas period. Comparing 2023 and 2022 seasonal patterns, January's share of spend within the year is 3 percentage points higher in 2023 compared with 2022, however 2022 saw spend more concentrated in July and October (a boost of 2 percentage points of share each).

# Card count | Similar trends to spend, with year on year growth focussed in the first quarter of 2023

Percentage change in inbound card count (2023 vs. 2022)



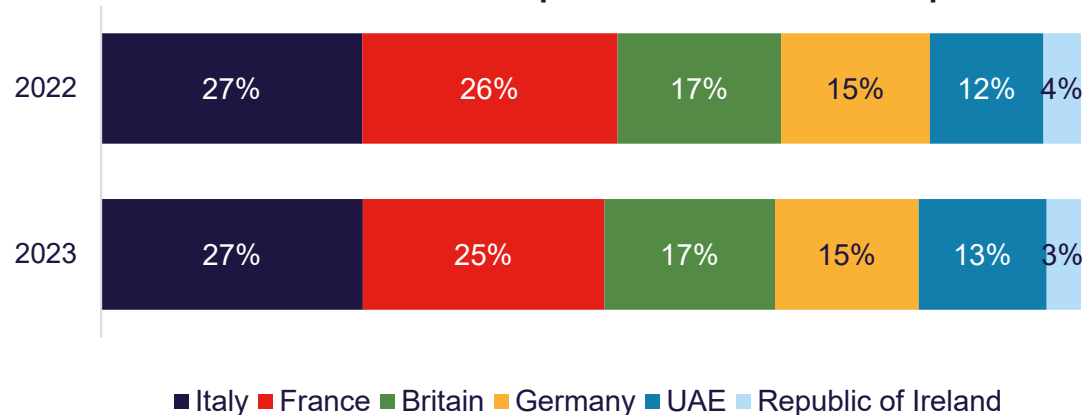
Annual card count distribution across months



- Trends in inbound card count from inbound visitors are very similar to those seen for spend, with a year on year growth of 28%. Year on year growth is also most concentrated in Q1. Card count could be compared to ‘visits’ from the International Passenger Survey; IPS saw visits grow by 21% year on year. Also, IPS visits saw a much more emphasised growth trend at the start of 2023 (246% growth in January 2023 vs. January 2022, and 110% growth in February 2023 vs. February 2022).
- Seasonally, we see card count also peaking in Q3 in 2023, with declines into Q4 and a boost in December. Compared to 2022, year on year differences are similar to those seen for spend, with January taking 3 percentage points more share of card count in 2023 vs. 2022, but 2022 seeing card count more concentrated in July, and September to December.

# Competitors | Britain ranked third for total spend within the set, but second for year on year spend growth

Share of inbound spend within selected competitor set



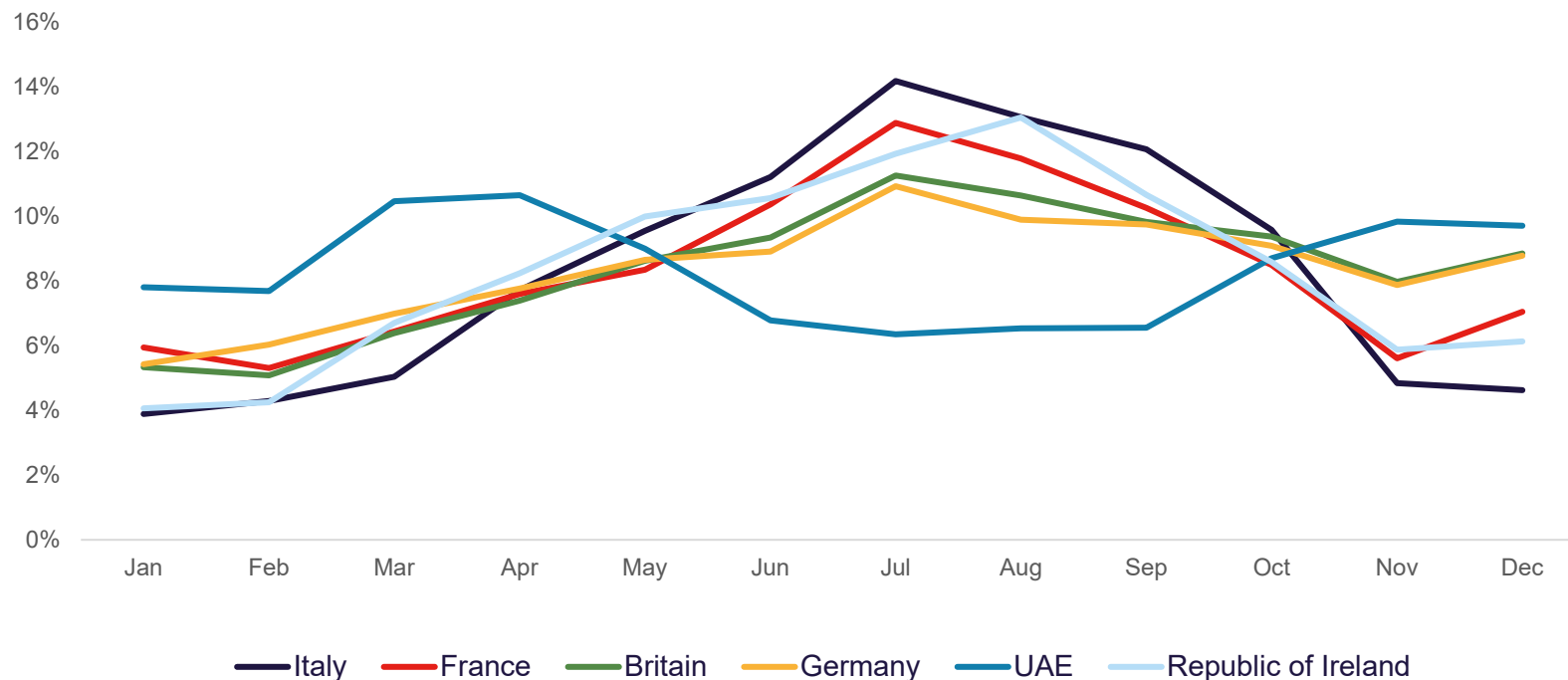
- Within the selected competitor set, Britain ranks third when it comes to share of total spend from inbound visitors in 2022 and 2023, following Italy and France. Britain holds a market share of 17% in both years.
- Britain's year on year growth in 2023 (28%) is among the highest seen in the competitor set, following the UAE (38%). Seasonal growth patterns vary between markets, however strong growth in the first quarter is seen across European markets.

Percentage change in inbound spend (2023 vs. 2022)

Months	Italy	France	Britain	Germany	UAE	Republic of Ireland
Jan	98%	94%	176%	97%	41%	74%
Feb	67%	58%	91%	76%	35%	32%
Mar	48%	29%	39%	37%	33%	24%
Apr	45%	24%	47%	26%	148%	14%
May	34%	20%	34%	16%	62%	18%
Jun	18%	17%	24%	15%	56%	8%
Jul	12%	5%	12%	8%	31%	5%
Aug	11%	7%	24%	10%	29%	16%
Sep	14%	10%	22%	8%	18%	7%
Oct	18%	7%	10%	5%	16%	7%
Nov	15%	4%	12%	11%	26%	5%
Dec	15%	4%	15%	13%	16%	4%
Yearly growth	23%	16%	28%	19%	38%	13%

# Competitors | Similar seasonal trends across European markets, but the UAE sees a reversed pattern

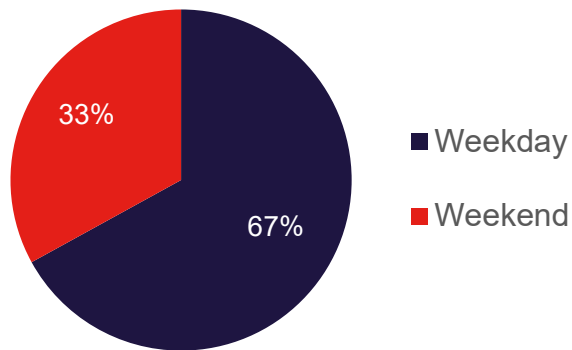
Seasonal share of inbound spend by competitor (2023)



- Seasonal share of spend in 2023 varies quite significantly across the competitor set.
- The starkest difference is between the only long haul market (the UAE) vs. European markets. The UAE sees inbound spend most concentrated in March, April, November, and December, with low summer months, perhaps as travellers try to avoid the heat.
- The other European markets see a similar seasonal spread to Britain, however peaks in the summer months are most emphasised for Italy. Britain's trend stays very close to Germany's, potentially due to similar climates.

# Spend characteristics | Fridays and Saturdays the most popular days for spending in 2023

Share of spend by day type (2023)



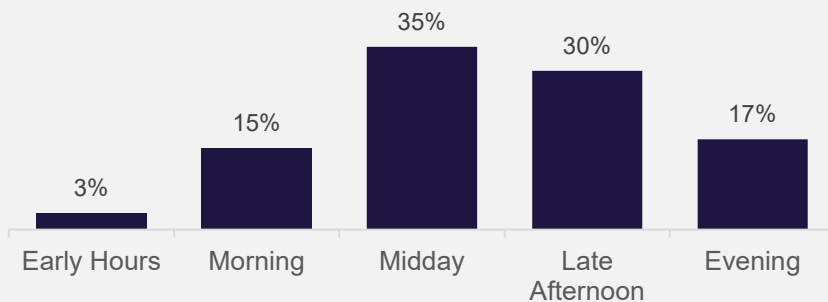
Share of spend by days of the week (2023)

Days of the week	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2023
Monday	16%	14%	12%	12%	16%	13%	16%	13%	13%	16%	12%	10%	14%
Tuesday	15%	13%	11%	12%	15%	12%	12%	16%	12%	14%	11%	11%	13%
Wednesday	12%	12%	14%	12%	15%	13%	12%	15%	12%	12%	15%	12%	13%
Thursday	12%	14%	15%	13%	13%	17%	13%	16%	13%	12%	16%	13%	14%
Friday	15%	16%	19%	16%	15%	18%	14%	14%	18%	14%	16%	19%	16%
Saturday	15%	17%	16%	19%	15%	14%	17%	14%	19%	15%	17%	19%	17%
Sunday	16%	14%	13%	15%	13%	12%	15%	12%	12%	16%	13%	15%	14%

- Spending behaviour can be examined in further detail by looking at the timing of spend, both by days of the week and times of day. Spend from inbound visitors to Britain is more highly concentrated at the weekend vs. what could be expected by assuming an even spread across days (33% vs. an assumed 29%), reflecting a preference for travel and leisure activities during these days.
- Examining days of the week across the full year of 2023, we can see that Fridays and Saturdays take the highest share of spend on average, however this pattern does change seasonally. For example, in January and October, Mondays and Sundays are the most popular days, whereas Tuesday and Thursday take the highest share in August.
- Trends in spend across days of the week is very similar when comparing 2023 and 2022.

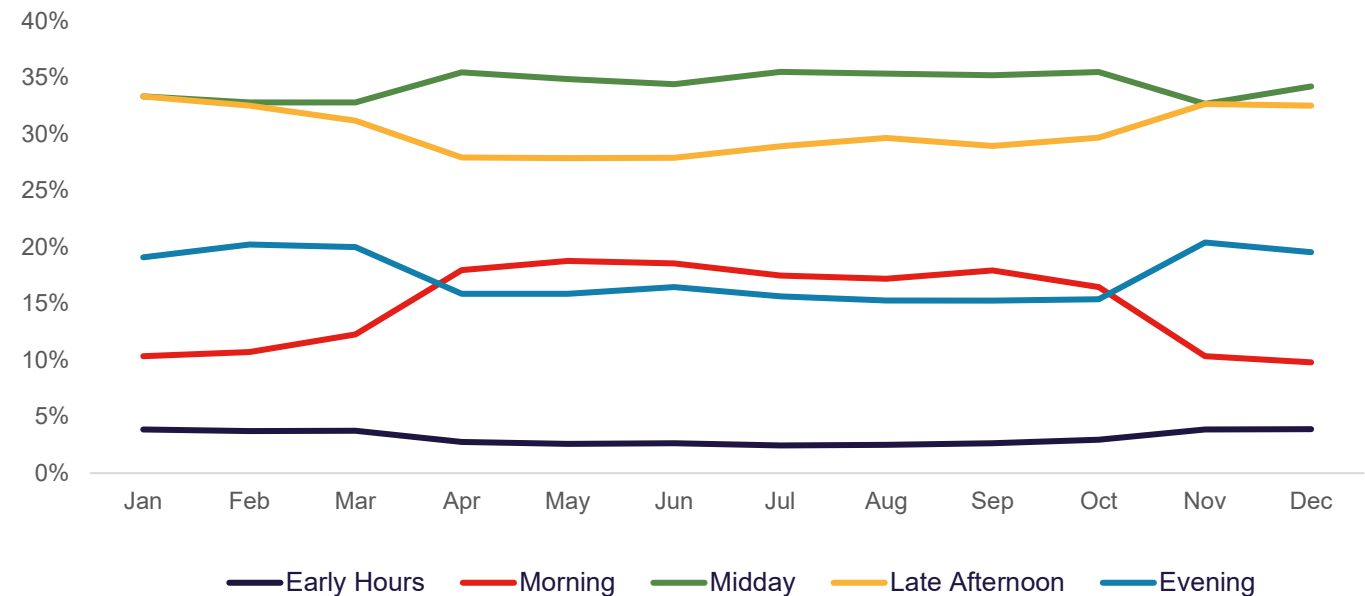
# Spend characteristics | Inbound visitors most likely to spend from midday to early afternoon, but seasonality does affect behaviour

Share of spend by time of day (2023)\*



- Looking at spend by time of day, we can see that in 2023 the most popular time for inbound visitors to spend was around midday (35%), followed by late afternoon (30%). 'Nighttime spending' (including evening and early hours), took a 20% share in that year.
- This pattern does see some variation based on season, with evening spending becoming more popular in colder months (January, February, March, November, December), whereas morning spend overtakes evening from April to October.

Share of spend by time of day, monthly (2023)

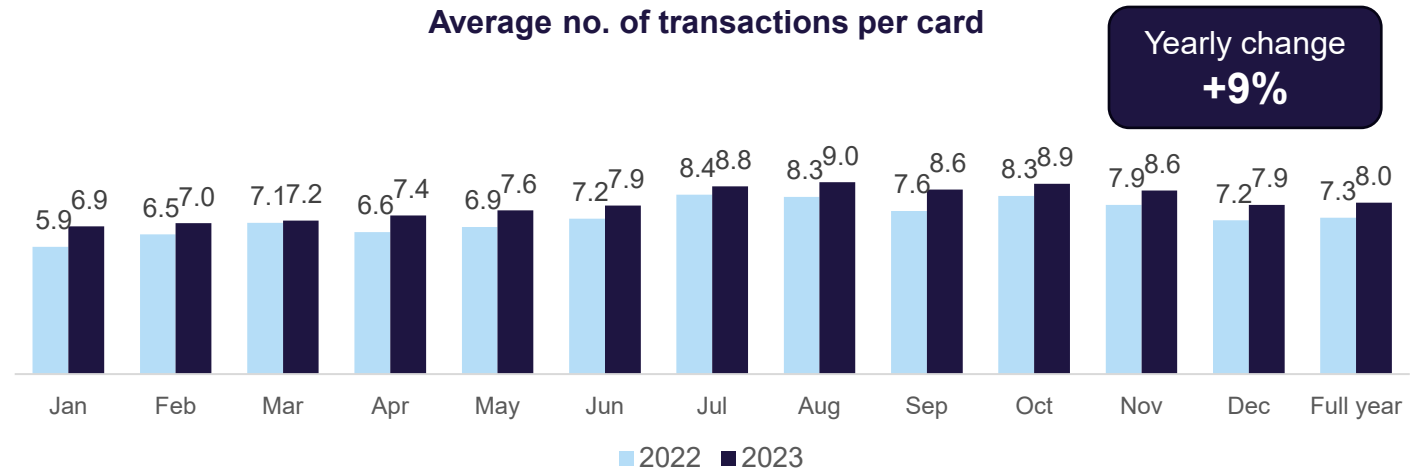


All values and percentage changes in spend are in nominal terms unless otherwise specified. Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included \*Early hours = midnight to 4.59am, morning = 5am to 10.59am, midday = 11am to 2.59pm, late afternoon = 3pm to 6.59pm, evening = 7pm to 11.59pm

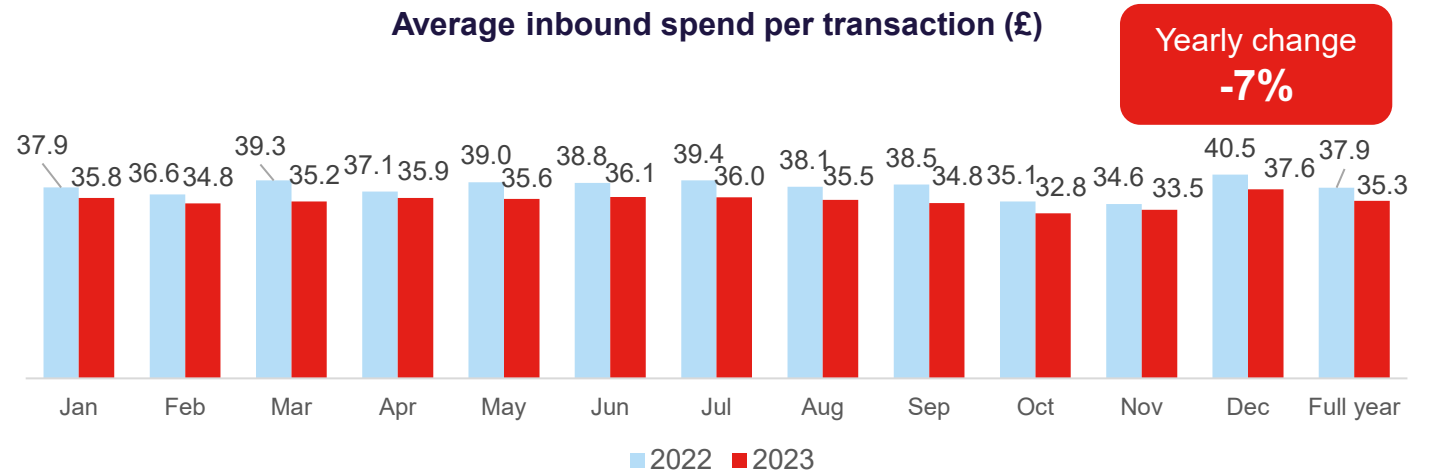
# Spend characteristics | Trends may suggest more frequent, smaller purchases while visiting when compared to last year

- When investigating the characteristics of spend taking place from inbound visitors in 2022 and 2023, we can see the average number of transactions taking place per card, per trip, increasing by 9% year on year. Within the year, the most growth took place in January.
- In contrast, the average spend per transaction decreased by 7% year on year (-13% in real terms). The strongest declines were in March and September.
- These trends may suggest that inbound travellers are using their cards more frequently for smaller purchases, meaning that behaviour may be shifting, but the overall 'budget' they are working to remains stable.

Average no. of transactions per card



Average inbound spend per transaction (£)



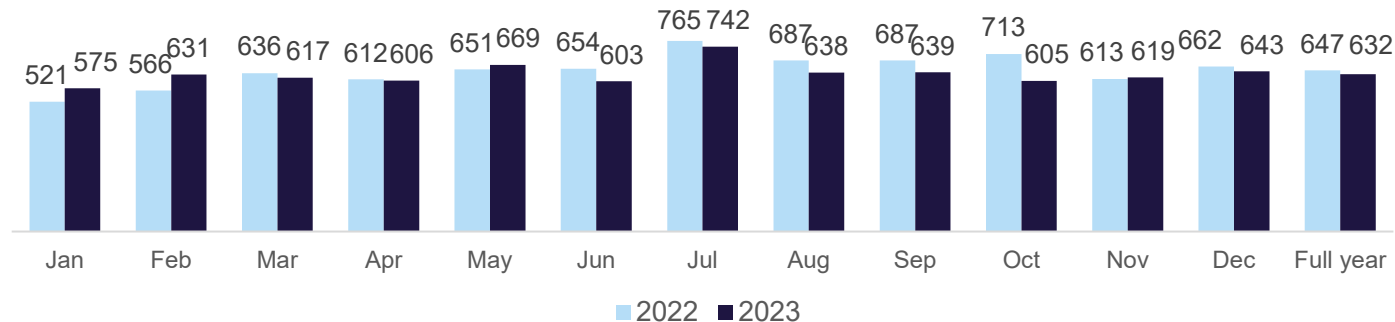


# Spend characteristics | Shorter stays in 2023 (vs. 2022) may be linked to lower spend per trip

- Looking further at spend characteristics, we can see that the average spend per trip between years has decreased slightly by 2% (-9% in real terms). We can compare this to spend per trip in 2023 from IPS, which decreased 3% year on year (-10% in real terms).
- Worth noting is that the average spend per trip from Visa cards is significantly lower vs. IPS (in 2023: £633 vs. £819). This likely indicates additional spending which cannot be tracked by Visa – either using other cards, with cash withdrawn before arriving in Britain, or online purchases.
- Average stay duration is also down year on year, by 8%, where IPS also saw a decline of 8% in 2023. Length of stay is higher from Visa, perhaps due to its measurement in days (first transaction vs. last transaction) rather than overnights for IPS.

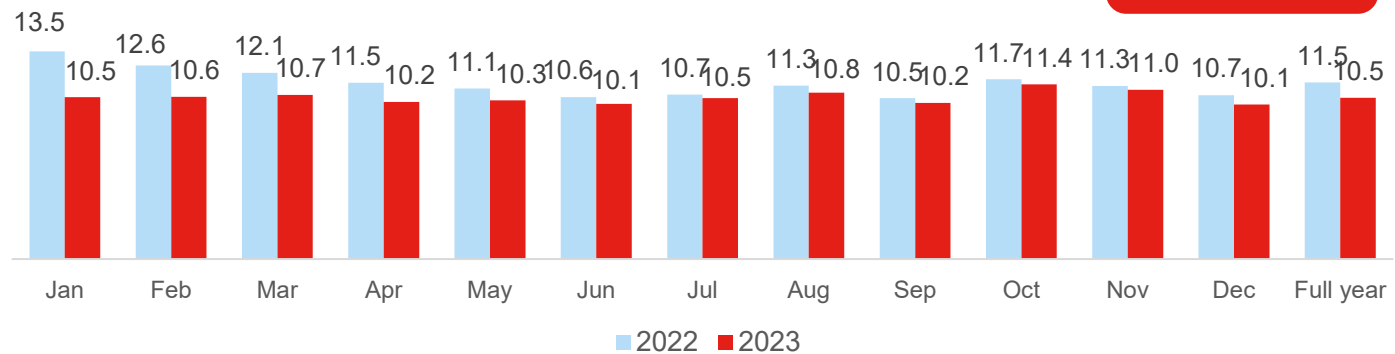
Average inbound in-person spend per trip (£)

Yearly change  
**-2%**



Average stay duration (days)\*

Yearly change  
**-8%**



All values and percentage changes in spend are in nominal terms unless otherwise specified. Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included

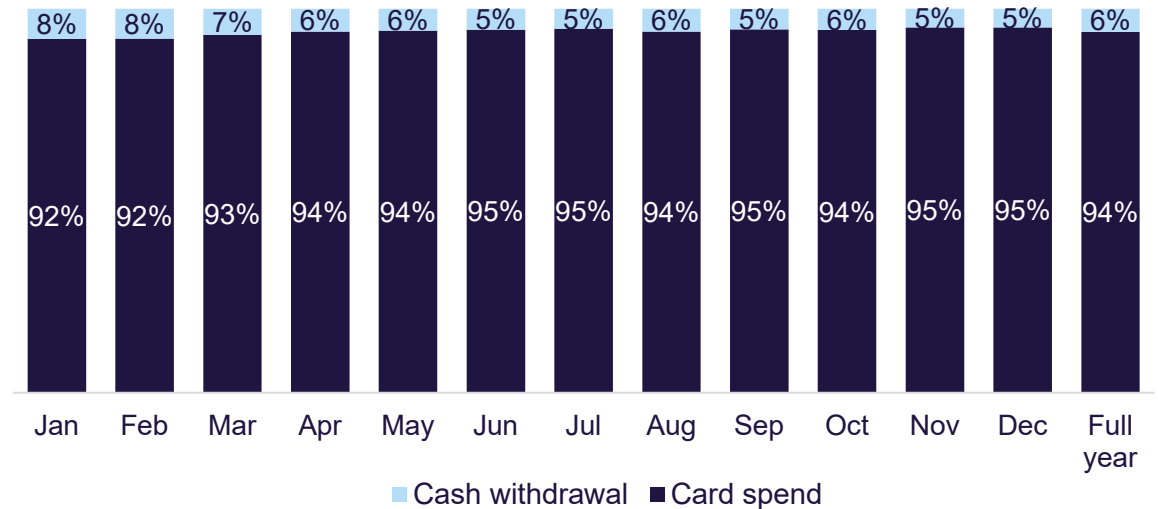
\*Please note that this is defined based on the dates and times of first and last transaction in Britain, so may differ from full length of stay

# Transaction type | Use of cash seems to be declining year on year

Share of cash withdrawal vs. card spend (2022)



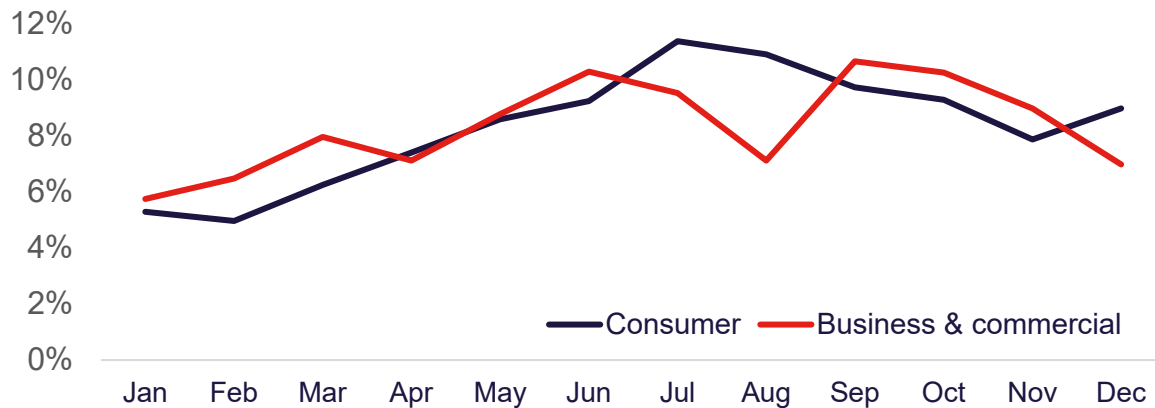
Share of cash withdrawal vs. card spend (2023)



Visa card spending data includes in person spending, both via card spend and via withdrawals from cash machines. Looking at 2022 and 2023, we can see the cash withdrawals are most prominent in Q1 and reduce in prominence as the years commence. Additionally, overall share of cash withdrawals declined by 2 percentage points year on year. This may suggest an overall move away from using cash and towards card transactions among travellers.

# Card type | Clear behavioural differences identified between users of business vs. consumer cards

Seasonal share of spend (2023)



Spend characteristics (2023)

	Business & commercial cards	Consumer cards
Average transactions per card	6.3	8.2
Average spend per transaction (£)	£62	£34
Average spend per trip (£)	£784	£550
Average stay duration (days)*	9.1	11.3

In terms of approximating the journey purpose of inbound travellers, we can identify whether the card being used is a consumer card, or one for business or commercial purposes. In 2023, 93% of spend took place using a consumer card, and 7% using a business or commercial card. Behavioural differences between the two groups can immediately be seen when examining seasonal trends in spend; those using business cards are more likely to be spending in February, March, and September to November, with a noticeable dip during the peak summer months. As we can also see among business travellers in IPS, inbound users of business cards spend more per visit, but tend to take shorter trips in Britain compared to leisure travellers.

All values and percentage changes in spend are in nominal terms unless otherwise specified. Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included

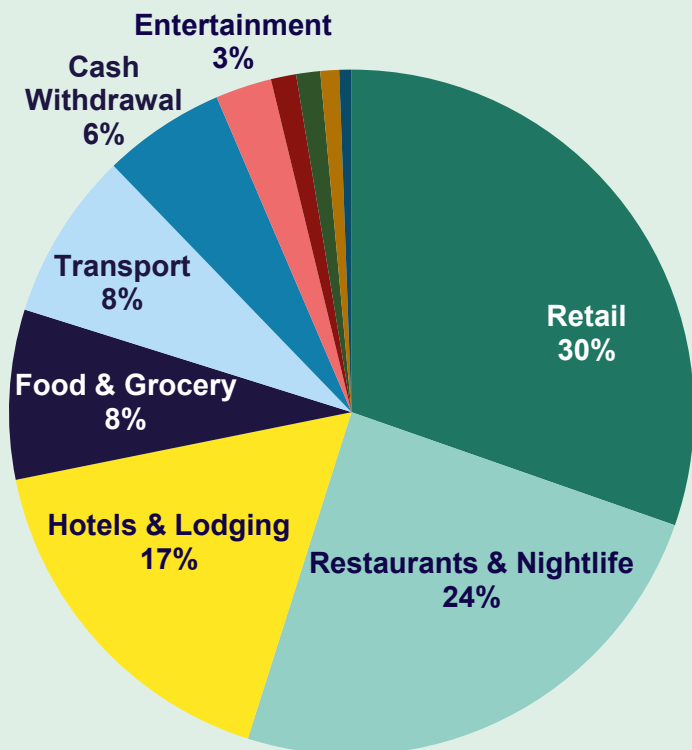
\*Please note that this is defined based on the dates and times of first and last transaction in Britain, so may differ from full length of stay

# Spending behaviour



# Spending behaviour | 2023 insight summary

## Share of spend per category



**Categories not shown in pie chart:** Fuel (1.2%), Drug stores & pharmacies (1.1%), Home improvement (0.9%), Travel services (0.6%), Automotive (0.4%), Wholesale clubs (0.01%)

### Retail Identical share vs 2022

- Top categories: adult clothing stores, family clothing stores, department stores
- Declines in share most prominent from department stores
- Spending more focussed in January, November, and December potentially linked to Christmas

### Restaurants & nightlife ▲ 1.4% share vs 2022

- Top categories: restaurants, bars/taverns/lounges/discos, fast food restaurants
- 'Restaurants' holds the largest share among all detailed spend categories across larger categories, with growth in share and total spend seen
- Seasonal spending almost identical to the average

### Hotels & lodging ▼ 0.9% share vs 2022

- Dominated by 'lodging' category; the second largest detailed spending category after 'restaurants'
- Spending on hotels & lodging more likely from May to July, during peak tourist season

### Transport ▲ 0.3% share vs 2022

- Top categories: passenger railways, local commuter transport, taxi cabs/limousines
- Transport has seen growth in spend share since 2021 perhaps reflecting the recession of COVID-19 travel restrictions
- Spend under-indexes in November and December

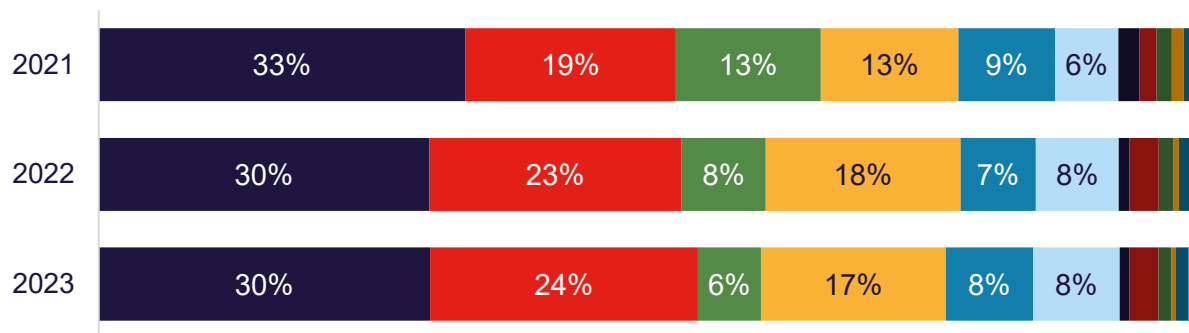
### Entertainment ▼ 0.1% share vs 2022

- Top categories: tourist attractions and exhibits, theatrical producers, member clubs/sport/recreation/golf
- 'Tourist attraction and exhibits' category saw significant growth in share and total spend vs. 2021
- Entertainment spend is highly seasonal, focussed in July and August

Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included. Read more about spend category definitions in this [Visa manual](#). All values and percentage changes in spend are in nominal terms unless otherwise specified.

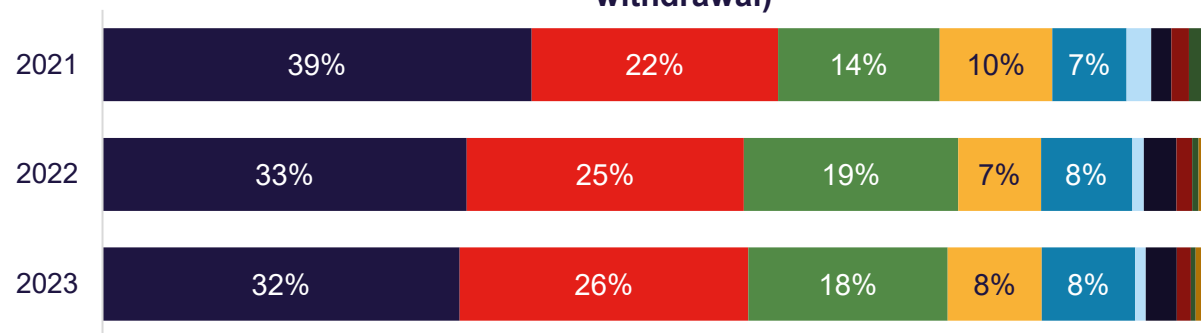
# Spend category | From 2021 to 2023, eating out and hotels take greater share, with retail spend becoming less prominent

Share of spend by market segment per year



- Retail
- Restaurants & Nightlife
- Cash Withdrawal
- Hotels & Lodging
- Food & Grocery
- Transportation

Share of spend by market segment per year (excl. cash withdrawal)



- Retail
- Restaurants & Nightlife
- Hotels & Lodging
- Food & Grocery
- Transportation
- Home Improvement & Supply

**Categories not shown in charts:** Home improvement (excluded from left hand chart only), Entertainment, Fuel, Automotive, Drug stores & pharmacies, Travel services, Wholesale clubs

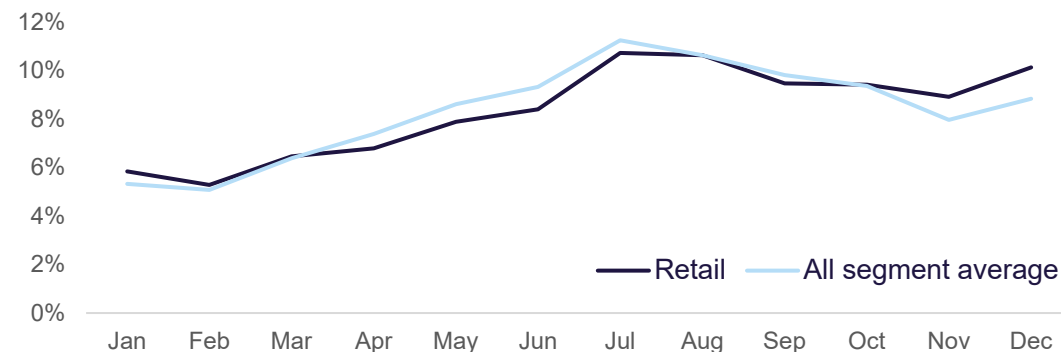
In order to understand what inbound travellers are spending their money on, we can first look at 13 overarching spend categories. From 2021 to 2023, the most dominant category was 'retail', although it did lose some share after 2021. The second most prominent category, 'restaurants & nightlife' has in contrast seen significant gains in share between 2021 and 2023, perhaps as COVID restrictions became less influential. Similarly, 'hotels and lodging' became more prominent after 2021, perhaps reflecting the return of more typical tourism behaviour post-COVID. The left-hand chart includes the 'cash withdrawal' segment, which has reduced in prominence year on year (this trend is further discussed on slide 17).

# Retail | Most share lost among department stores, with seasonal spend focussed around the Christmas period

## Detailed spend categories' share among total inbound spend

Detailed spend category (top 10)	2021	2022	2023	YoY share growth	YoY spend growth
Mens/Womens Clothing Stores	5.8%	5.2%	5.1%	-0.1%	25%
Family Clothing Stores	4.4%	4.3%	4.4%	0.0%	29%
Department Stores	5.9%	4.5%	4.1%	-0.4%	16%
Duty Free Stores	1.4%	1.6%	1.9%	0.2%	46%
Gift, Card, Novelty Stores	0.6%	1.0%	1.2%	0.2%	47%
Luggage/Leather Stores	1.2%	1.2%	1.1%	-0.1%	21%
Jewelry Stores	1.5%	1.1%	1.0%	-0.1%	20%
Sporting Goods Stores	1.1%	1.0%	0.9%	0.0%	23%
Shoe Stores	0.9%	0.9%	0.9%	-0.1%	19%
News Dealers/Newsstands	0.4%	0.5%	0.8%	0.3%	117%

Annual spend distribution across months (2023)



- Within the 'retail' category, we see some declines in total spend share across top categories from 2021 to 2023, with this trend most prominent from 'department stores'. However, among the top 10 detailed category codes, all are seeing year on year growth in total spend (in nominal terms).
- Examining seasonal trends in 2023, we can see that retail spending is slightly more focussed in January, November and December compared to the average, which may be linked to pre-Christmas and January sale shopping.

# Restaurants & nightlife | Restaurant category holds significant share, with spend matching average seasonal patterns

Detailed spend categories' share among total inbound spend

Detailed spend category	2021	2022	2023	YoY share growth	YoY spend growth
Restaurants	14.1%	16.5%	17.4%	0.9%	35%
Bars/Taverns/Lounges/Discos	3.0%	3.7%	3.8%	0.1%	31%
Fast Food Restaurants	1.9%	2.3%	2.7%	0.4%	49%
Caterers	0.3%	0.4%	0.5%	0.1%	49%

Annual spend distribution across months (2023)



- Among all detailed spend categories within every larger category, the one which holds the largest share of spend is 'restaurants', and this category has also seen year on year growth in share. All categories within 'restaurants and nightlife' are also seeing strong year on year growth in total spend (in nominal terms).
- Seasonal spending in this segment in 2023 is almost identical to the average, perhaps suggesting that inbound trips are always highly likely to include this type of spending.

Please note that this data covers in person spend only; online spend is not included. All values and percentage changes in spend are in nominal terms unless otherwise specified. Read more about spend category definitions in this [Visa manual](#). All values and percentage changes in spend are in nominal terms unless otherwise specified.

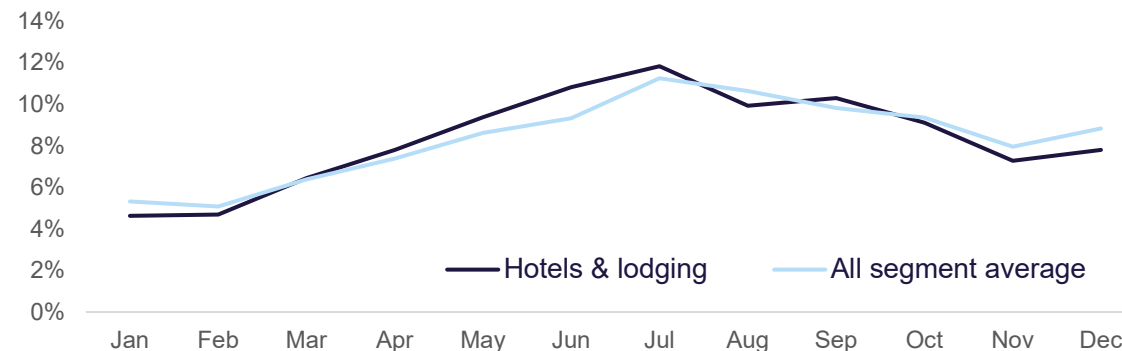


# Hotels and lodging | ‘Lodging’ also holding a high share of spend within the total, but losing some share year on year

Detailed spend categories’ share among total inbound spend

Detailed spend category	2021	2022	2023	YoY share growth	YoY spend growth
Lodging	12.6%	17.7%	16.8%	-0.9%	22%

Annual spend distribution across months (2023)



*Note: ‘lodging’ holds close to 100% share of this segment.*

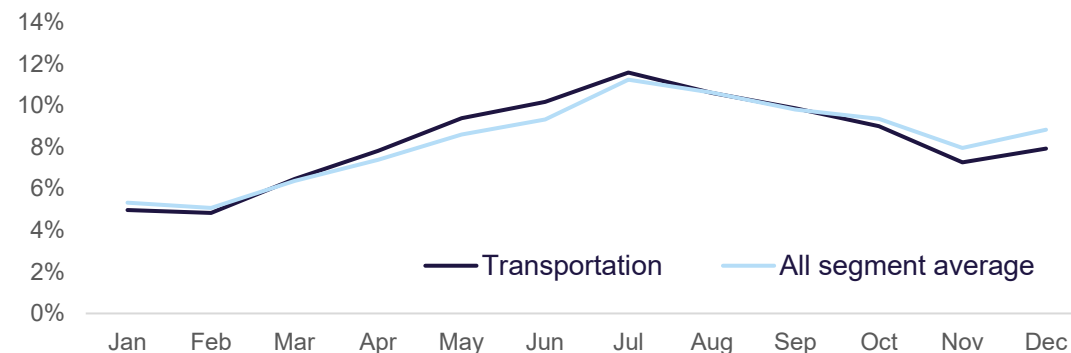
- The ‘lodging’ detailed spend category comes second only to ‘restaurants when it comes to share of spend within the total (16.8% vs. 17.4%). However this category saw some year on year decline in share.
- Spending within hotels and lodging is slightly more likely to take place from May to July vs. the average, with lower shares at the start and end of the year.

# Transportation | Passenger railways holding the largest share of spend

## Detailed spend categories' share among total inbound spend

Detailed spend category (top 10)	2021	2022	2023	YoY share growth	YoY spend growth
Passenger Railways	1.6%	2.3%	2.2%	-0.1%	20%
Local Commuter Transport	0.8%	1.1%	1.6%	0.5%	83%
Taxicabs/Limousines	1.2%	1.6%	1.4%	-0.1%	18%
Auto Rental	0.9%	1.2%	1.2%	0.1%	34%
Airlines	0.5%	0.5%	0.6%	0.1%	47%
Bus Lines	0.2%	0.4%	0.3%	0.0%	16%
Parking	0.1%	0.1%	0.1%	0.0%	43%
Lots, Meters, Garages	0.1%	0.1%	0.1%	0.0%	35%
Transportation Svcs - Default	0.1%	0.1%	0.1%	0.0%	33%
Steamship/Cruise Lines	0.1%	0.1%	0.1%	0.0%	9%
Airports/Fields/Terminals	0.2%	0.1%	0.1%	0.0%	

Annual spend distribution across months (2023)



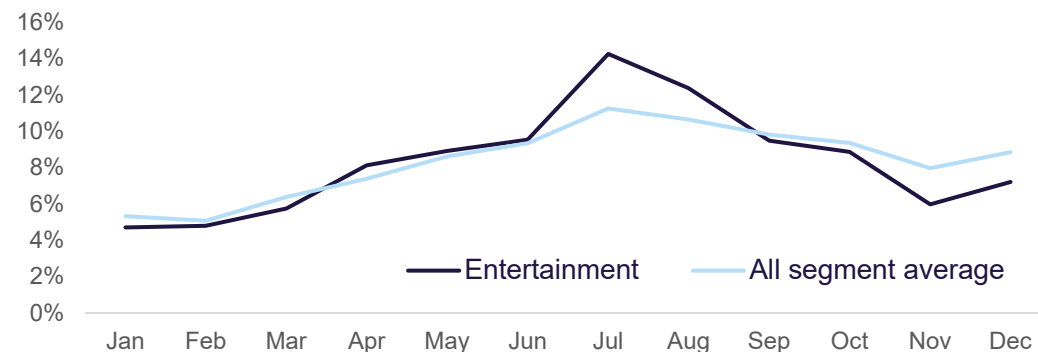
- Within the larger 'transportation' spend category, we can see that 'passenger railways' hold the largest share of spend among inbound visitors.
- This category has seen some growth in share after 2021, alongside car rentals, commuter transport, and airlines, perhaps reflecting the recession of COVID-19 travel restrictions during that period.
- Seasonal trends in spend for 'transportation' stay very close to the average, but with some declines in share ahead of the Christmas period in November and December.

# Entertainment | Spend on tourist attractions seeing significant growth, with strongly seasonal spend seen for this segment

Detailed spend categories' share among total inbound spend

Detailed spend category (top 10)	2021	2022	2023	YoY share growth	YoY spend growth
Tourist Attractions And Exhibits	0.3%	0.8%	0.9%	0.1%	49%
Theatrical Producers Member	0.3%	0.6%	0.6%	0.0%	27%
Clubs/Sport/Rec/Golf	0.4%	0.5%	0.4%	-0.1%	7%
Recreation Services	0.2%	0.4%	0.3%	-0.1%	-7%
Commercial/Pro Sports	0.1%	0.1%	0.1%	0.0%	24%
Bands/Orchestras/Entertainment	0.0%	0.1%	0.1%	0.0%	45%
Motion Picture Theatres	0.1%	0.1%	0.1%	0.0%	25%
Public Golf Courses	0.0%	0.1%	0.1%	0.0%	-8%
Amusement Parks/Circus	0.0%	0.0%	0.0%	0.0%	17%
Betting/Track/Casino/Lotto	0.0%	0.0%	0.0%	0.0%	44%

Annual spend distribution across months (2023)



- Within the 'entertainment' category, the smaller 'tourist attractions and exhibits' category is of special interest. This category saw significant growth in share from 2021 to 2022, and some further growth up to 2023. It also saw 49% year on year growth in total spend (39% in real terms).
- This may be reflective of the resumption of tourist activities post-COVID.
- Seasonal spending is particularly emphasised for the entertainment category, with 3 percentage points and 2 percentage points more share of spend seen in July and August, but below average spend in November and December in the colder months.

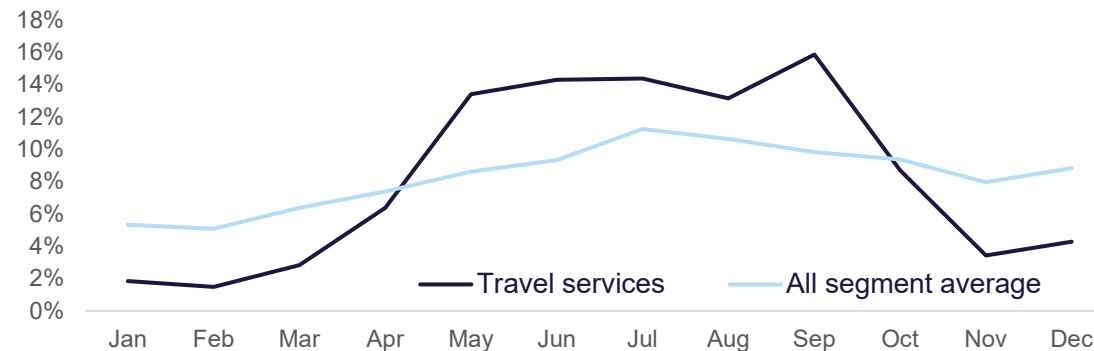
Please note that this data covers in person spend only; online spend is not included. All values and percentage changes in spend are in nominal terms unless otherwise specified. Read more about spend category definitions in this [Visa manual](#). All values and percentage changes in spend are in nominal terms unless otherwise specified.

# Travel services | Strong year on year growth in face to face spend at travel agencies

Detailed spend categories' share among total inbound spend

Detailed spend category	2021	2022	2023	YoY share growth	YoY spend growth
Travel Agencies	0.1%	0.4%	0.6%	0.2%	99%

Annual spend distribution across months (2023)



*Note: 'Travel agencies' is the only detailed spending category in 'travel services'*

- 'Travel services' holds a small share of spend within the total, however year on year growth can be seen, and strong growth in total spend of 99% (in nominal terms).
- Spend in the travel services segment highly seasonal, with peaks from May to September. Since this data shows in person spend, this may reflect 'last minute' holiday bookings in brick-and-mortar travel agencies.

# Origin market analysis



# Origin market analysis | 2023 insight summary

## Top markets by spend

1	USA	+27% vs. 2022
2	Irish Republic	+17% vs. 2022
3	France	+32% vs. 2022
4	Saudi Arabia	+23% vs. 2022
5	Australia	+54% vs. 2022

## Highest spend per trip\*

- 1 UAE £1,400
- 2 Qatar £1,297
- 3 Saudi Arabia £929
- 4 Hong Kong, China £717
- 5 China Mainland £619



## Longest length of stay \*\*\*

- 1 China mainland 16.3 days
- 2 Qatar 16.2 days
- 3 India 15.1 days
- 4 Hong Kong, China 12.2 days
- 5 New Zealand 11.7 days

## Some other insights...

Strongest YoY spend growth came from **China Mainland**, **South Korea**, and **Brazil**



Spend from **Norway** is particularly evenly spread across quarters, whereas **New Zealand** spend is highly focussed in Q3

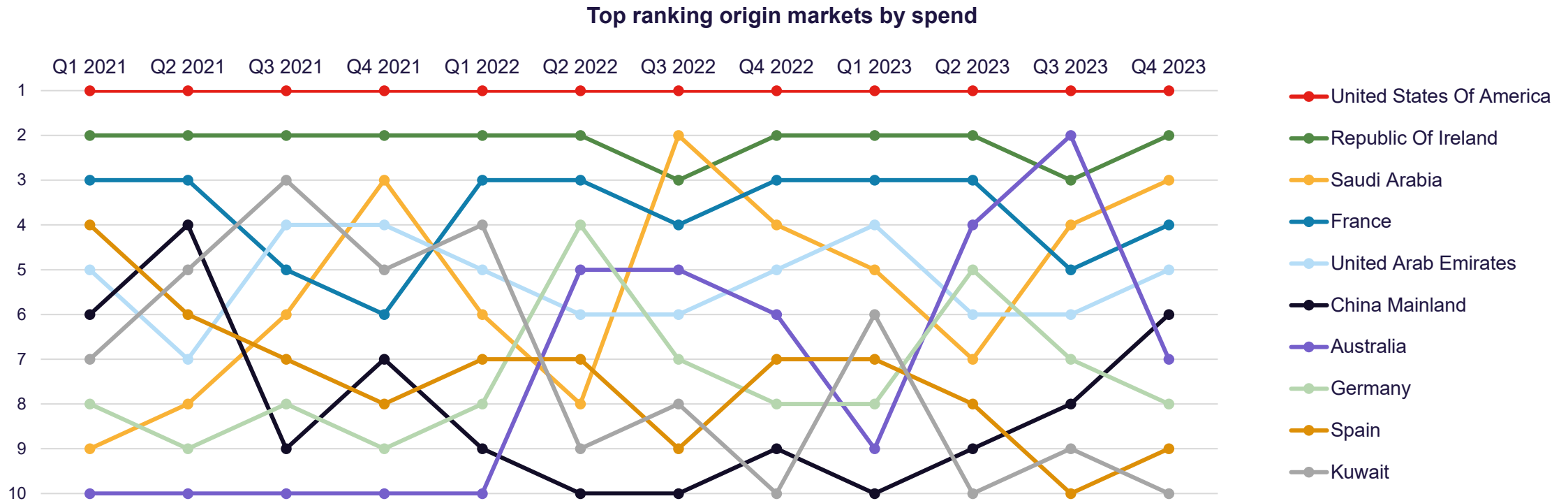


**Indian** travellers show a propensity for using cash, and **China** and the **Gulf** markets over-index on shopping



Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included. \*Ranking is within 24 selected inbound markets \*\*This is defined based on the dates and times of first and last transaction in Britain, so may differ from full length of stay. All values and percentage changes in spend are in nominal terms unless otherwise specified.

# Overview | Most valuable origin markets at the end of 2023 were the USA, Republic of Ireland, and Saudi Arabia



Looking at inbound spend from Visa cards, the most valuable inbound markets between 2021 and 2023 tend to be the USA and Republic of Ireland. The Republic of Ireland loses second place only in Q3 2022 (to Saudi Arabia) and Q3 2023 (to Australia). Between Q4 2021 and Q4 2023, the most gains can be seen from Saudi Arabia; up 6 ranks. In contrast, Spain lost 5 ranks in that time.

# Spend patterns | Strongest year on year growth from China, South Korea, and Brazil

## Seasonal spend share per origin market (2023)

- Looking at our key origin markets, we can firstly see that the highest year on year growth in inbound spend came from China Mainland (121% growth), South Korea (94%), and Brazil (84%), which may reflect the return of long haul travel post-COVID.
- In general, seasonal spread of spend across markets is similar, with the most spend taking place in Q3, and the least in Q1.
- However, there are some exceptions. Norway sees relatively evenly spread spend across quarters, with the most seen in Q4. China Mainland saw recovery focussed in Q3 and Q4, which may be indicative of post-COVID travel recovery.
- Q4 is also particularly popular with Saudi Arabia, Spain, and Switzerland. In contrast, spend from New Zealand is most concentrated in Q3 compared with other markets.

Key market	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)	YoY spend growth
Australia	12%	29%	38%	21%	54%
Austria	18%	26%	30%	26%	27%
Belgium	18%	25%	30%	28%	39%
Brazil	18%	25%	29%	27%	84%
Canada	14%	29%	35%	22%	22%
China Mainland	12%	16%	37%	35%	121%
Denmark	18%	26%	28%	28%	14%
France	18%	25%	28%	29%	32%
Germany	13%	29%	34%	23%	42%
Hong Kong, China	17%	25%	34%	23%	33%
India	18%	28%	29%	25%	4%
Italy	19%	22%	30%	29%	33%
Japan	20%	23%	33%	24%	76%
Netherlands	14%	27%	33%	25%	38%
New Zealand	9%	27%	43%	21%	82%
Norway	20%	26%	26%	28%	1%
Qatar	21%	14%	38%	26%	6%
Saudi Arabia	14%	15%	36%	35%	23%
South Korea	21%	22%	29%	29%	94%
Spain	19%	22%	29%	30%	26%
Sweden	23%	27%	26%	25%	16%
Switzerland	16%	26%	28%	30%	30%
UAE	16%	19%	35%	29%	26%
USA	14%	31%	33%	22%	27%

Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included. All values and percentage changes in spend are in nominal terms unless otherwise specified. Russia is not included as a key market as Visa suspended its Russian operations in March 2022.



# Spend per trip | Gulf markets dominating ranking, with China, UAE, and Denmark seeing most year-on-year growth

## Average spend per trip among key origin markets (2023)

- Examining the average spend per trip of inbound visitors to Britain, we see that three Gulf markets are top ranked, followed by Hong Kong (China) and China Mainland. Indeed, long haul markets dominate the ranking until 13<sup>th</sup> place (Austria).
- The strongest year on year growth in spend per visit comes from China Mainland (28%), the UAE (9%), and Denmark (6%).
- We see similar spend per visit trends from the IPS, with top ranked markets for this measure in 2023 being Qatar, Kuwait, and Oman.
- As discussed on slide 16, spend per visit figures from Visa cards tends to be lower compared to what is captured via IPS, due to the limit of in person Visa card transactions only.

Please note: ranking is within 24 selected inbound markets  
All values and percentage changes in spend are in nominal terms unless otherwise specified. Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included. Russia is not included as a key market as Visa suspended its Russian operations in March 2022.

	2023 spend per trip (£)	YoY growth
UAE	1,400	9%
Qatar	1,297	-6%
Saudi Arabia	929	-12%
Hong Kong, China	717	-12%
China Mainland	619	28%
Australia	590	-5%
South Korea	577	-12%
USA	574	-1%
Brazil	574	3%
Japan	567	-7%
Canada	538	-4%
New Zealand	532	-3%
Austria	504	2%
Norway	492	-11%
Switzerland	454	-5%
India	430	-9%
Denmark	386	6%
Germany	363	-7%
Belgium	353	1%
Netherlands	350	-3%
France	341	-3%
Italy	340	-8%
Sweden	330	-12%
Spain	274	1%
<b>All market average</b>	<b>632</b>	<b>-3%</b>

# Stay duration | Long haul markets staying in Britain the longest, with no key markets seeing longer stays in 2023

## Average stay duration in days among key origin markets (2023)

- Similarly to spend per visit, long haul markets demonstrated the longest stay durations on average in 2023, with the top ranked markets being China Mainland, Qatar, India, and Hong Kong (China). The highest ranked European market is Spain in 14<sup>th</sup> place.
- On average, stay duration declined year on year at an overall level, and this is reflected across markets. None of the key origin markets saw a growth in stay duration year on year, however Brazil, the UAE and Denmark saw the smallest declines.
- Yearly length of stay is longer than what is seen in the IPS (10.5 nights vs. 7.7 nights in IPS). However, there are some similarities when comparing top ranked markets with those from IPS. In 2023, the third ranked market for length of stay in IPS was China, followed by India. However, the Visa ranking sees a higher prominence of the Gulf markets.

Please note: ranking is within 24 selected inbound markets  
 All values and percentage changes in spend are in nominal terms unless otherwise specified.  
 Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included. Length of stay is defined based on the dates and times of first and last transaction in Britain, so may differ from full length of stay. Russia is not included as a key market as Visa suspended its Russian operations in March 2022.

	2023 stay duration (days)	YoY growth
China Mainland	16.3	-20%
Qatar	16.2	-4%
India	15.1	-7%
Hong Kong, China	12.2	-20%
New Zealand	11.7	-9%
Australia	10.8	-6%
Saudi Arabia	10.2	-8%
UAE	9.5	-3%
Brazil	9.4	-2%
Canada	8.4	-7%
Switzerland	8.4	-10%
USA	8.1	-9%
Japan	7.7	-28%
Spain	7.7	-11%
South Korea	7.4	-22%
Austria	6.7	-25%
Germany	6.2	-10%
Netherlands	6.1	-8%
France	6.1	-12%
Italy	5.9	-14%
Belgium	5.9	-7%
Sweden	5.7	-6%
Norway	5.4	-12%
Denmark	5.1	-3%
All market average	10.5	-8%

# Spending behaviour | Indian travellers showing a particular propensity for using cash, and China and the Gulf markets for shopping

## Spend share among market segments (2023)

Key market	Automotive	Cash Withdrawal	Pharmacies	Entertainment	Food & Grocery	Fuel	Home Imp. & Supply	Hotels & Lodging	Restaurants & Dining	Retail	Transport	Travel Services
Australia	1%	5%	1%	3%	10%	2%	1%	15%	29%	20%	10%	3%
Austria	0.2%	1%	1%	3%	6%	1%	1%	28%	26%	20%	13%	0.3%
Belgium	0.3%	4%	1%	3%	8%	3%	1%	20%	31%	21%	8%	0.2%
Brazil	0.3%	2%	2%	3%	11%	1%	1%	12%	26%	32%	10%	0.2%
Canada	0.3%	4%	1%	3%	8%	1%	1%	21%	27%	22%	10%	2%
China Mainland	1%	4%	2%	2%	11%	1%	1%	8%	18%	50%	4%	0.1%
Denmark	0.1%	3%	1%	4%	8%	1%	0.4%	13%	33%	26%	9%	0.3%
France	0.3%	6%	1%	3%	9%	2%	1%	15%	30%	21%	12%	0.2%
Germany	0.2%	6%	1%	4%	10%	3%	1%	18%	30%	18%	10%	0.3%
Hong Kong, China	2%	1%	1%	2%	8%	1%	3%	12%	21%	42%	6%	0.1%
India	0.3%	20%	1%	2%	10%	1%	1%	13%	14%	33%	6%	0.2%
Italy	0.2%	3%	1%	3%	9%	1%	1%	17%	33%	20%	12%	0.2%
Japan	0.4%	3%	1%	4%	11%	0.5%	1%	23%	21%	27%	10%	0.1%
Netherlands	0.4%	7%	1%	3%	9%	4%	1%	20%	30%	16%	9%	0.2%
New Zealand	1%	5%	1%	3%	12%	3%	1%	11%	27%	23%	10%	2%
Norway	0.2%	5%	2%	3%	9%	1%	1%	12%	29%	31%	8%	0.2%
Qatar	0.3%	7%	2%	1%	4%	0.3%	1%	20%	12%	48%	3%	0.1%
Saudi Arabia	0.1%	5%	2%	1%	5%	0.3%	0.4%	14%	21%	48%	4%	0.1%
South Korea	0.2%	2%	1%	7%	10%	0.3%	0.4%	11%	27%	33%	8%	0.1%
Spain	0.3%	3%	1%	3%	11%	2%	1%	15%	32%	19%	13%	0.2%
Sweden	0.2%	4%	1%	3%	9%	1%	1%	15%	32%	24%	9%	0.2%
Switzerland	0.3%	3%	1%	2%	6%	1%	1%	19%	25%	32%	9%	0.2%
UAE	1%	7%	2%	1%	5%	1%	1%	16%	15%	48%	4%	0.1%
USA	0.4%	5%	1%	3%	6%	1%	1%	23%	27%	23%	8%	1%
All market average	0.0%	6%	1%	3%	8%	1%	1%	17%	24%	30%	8%	1%

All values and percentage changes in spend are in nominal terms unless otherwise specified. Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included. The 'Wholesale clubs' category is not included due to particularly low share. Russia is not included as a key market as Visa suspended its Russian operations in March 2022.

# British destination trends



# British destination trends | Introduction

When exploring the insights in this section, please note that:

- Despite the number of card spending records exceeding the sample size for surveys when looking at smaller geographical areas, we do still see some influence of outliers when examining the trends, and where relevant these have been noted.
- The typical experience of destinations will not necessarily reflect the exact trends shown here – this is an aggregation of all cardholders, and some high spenders will affect the data, particularly in regions with overall lower numbers of international visitors.

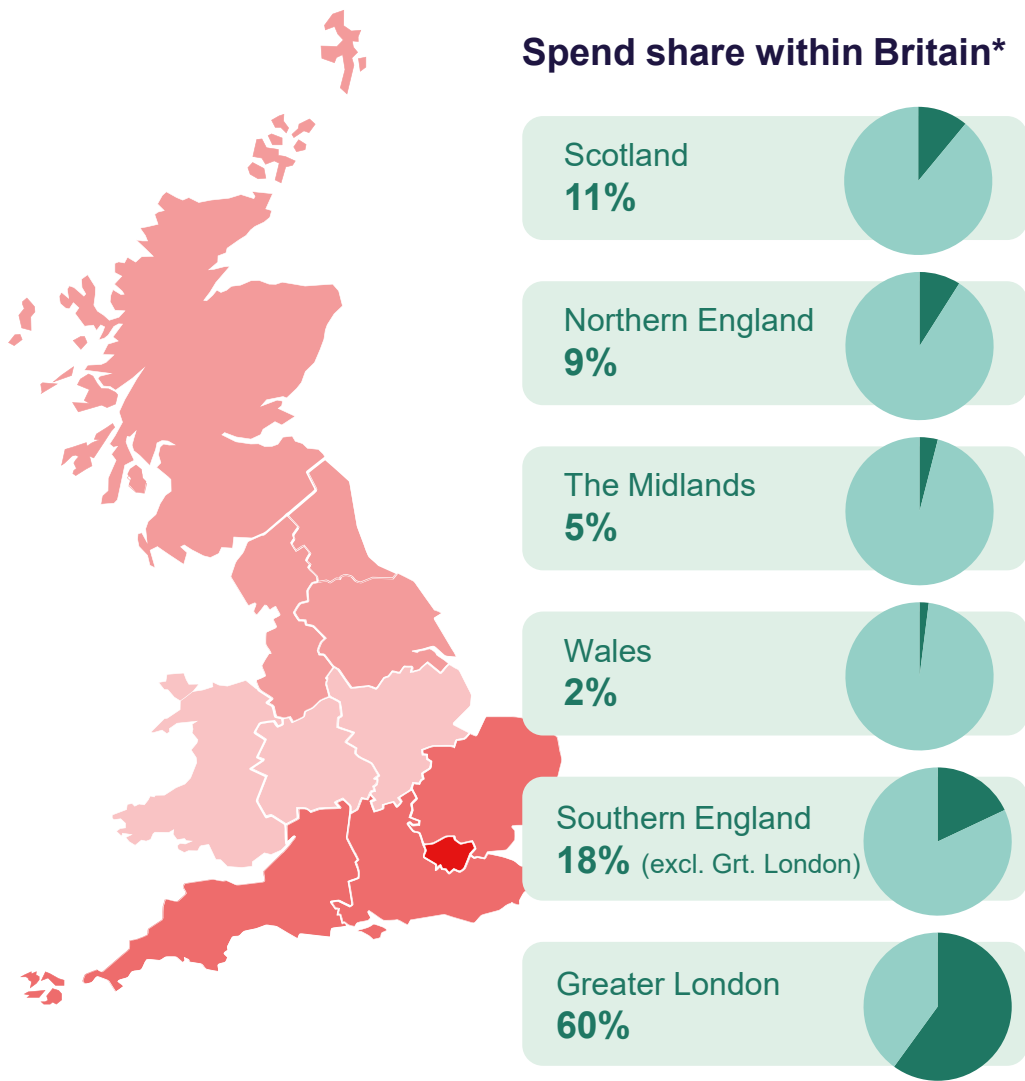
## Key insights

- The spread of spend from inbound visitors across Britain in 2023 **has some differences** when comparing card spending data with trends from the International Passenger Survey. Northern England destinations' share comes closest between the sources (9% vs. 10% in IPS) with London and Southern England both seeing the largest increase in share in the card spending data (6 percentage points for London, 5 percentage points for Southern England) which may be reflective of slightly **differing travel behaviour** among Visa card users vs. inbound visitors as a whole.
- Looking at seasonality, most destinations across Britain follow the pattern of **July to August being the strongest months** in the year for spend, and January and March being the weakest. However, **some destinations** are less likely to follow this, including Birmingham, Solihull and the Black Country which over-indexes on spend between January and March, Shropshire and Herefordshire over-indexing in January, and Leicestershire and Nottinghamshire receiving more spend than average in October and November.
- Across Britain in 2023, inbound visitors were most likely to spend on the **restaurants and nightlife**, and **retail** categories. However, transport spend was also particularly prominent in Southern England, cash withdrawal and food and grocery in Northern England and the Midlands, with fuel also particularly prominent in Scotland.
- **The USA** was the most prominent origin market for inbound spend in 2023 across most destinations (and indeed across each nation as a whole); however, the **Republic of Ireland** came top in a selection of destinations in Northern England, the Midlands, Southern England, and Wales.

Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included.

# British destination trends | 2023 insight summary

## Spend share within Britain\*



### Scotland

- 30% year on year spend growth (real terms)
- Most growth seen from South of Scotland
- More spend than average seen in summer months
- Food and grocery, and fuel spending particularly likely

### Northern England

- 19% year on year spend growth (real terms)
- Most growth seen from Cheshire & Warrington
- Cumbria and Northumberland over-index on summer spend
- Cash withdrawal and food and grocery spend particularly likely

### The Midlands

- 22% year on year spend growth (real terms)
- Most growth seen from Herefordshire\*\*
- Birmingham, Solihull and the Black Country, plus Shropshire over-indexing on Q1 spend
- Cash withdrawal and food & grocery spend particularly likely

### Wales

- 41% year on year spend growth (real terms)
- Most growth seen from Mid Wales
- More spend than average seen in July and August
- Travellers over-index on retail spend in multiple Welsh destinations

### Southern England

- 19% year on year spend growth (real terms)
- Most growth seen from Cotswolds Plus
- Cornwall, Dorset, Devon, Sussex & Isle of Wight over-index on summer spend
- Over-index on 'food and grocery' spend

### Greater London

- 17% year on year spend growth (real terms)
- Most spend seen in July
- Inbound travellers most likely to spend on retail and restaurants and nightlife
- Two Gulf markets among top 5 spenders

Please note that this data covers in person spend and cash withdrawals by Visa cards only; online spend is not included. \*Destination totals add up to more than 100% due to some overlap in destinations. Please refer to the appendix for details on destination definitions. \*\*Herefordshire's high 2023 figure is likely influenced by exceptionally high spending in transport from a US outlier. All values and percentage changes in spend are in nominal terms unless otherwise specified.



# Spend share | Greater London receiving 60% of inbound spend to Britain

## Spend share within Britain (2023)

Northern England destinations	Share of spend
Cheshire and Warrington	0.6%
Cumbria	0.4%
County Durham	0.1%
Hull and East Yorkshire	0.1%
Greater Manchester	3.1%
Lancashire	0.4%
Liverpool City Region	1.3%
North Yorkshire incl. York	0.8%
Northumberland	0.1%
South Yorkshire	0.4%
Tees Valley	0.1%
Tyne and Wear	0.4%
West Yorkshire	0.8%
<b>TOTAL</b>	<b>8.6%</b>

Midlands destinations	Share of spend
Birmingham, Solihull and the Black Country	1.4%
Coventry & Warwickshire	0.7%
Peak District Derbyshire and Derby	0.3%
Greater Lincolnshire & Rutland	0.3%
Herefordshire	0.3%
Leicestershire	0.4%
Northamptonshire	0.3%
Nottinghamshire	0.4%
Shropshire	0.4%
Staffordshire	0.4%
Worcestershire	0.2%
<b>TOTAL</b>	<b>5.0%</b>

Southern England destinations	Share of spend
Bedfordshire	0.5%
Berkshire	1.0%
Bristol and Bath	1.2%
Buckinghamshire	0.6%
Cambridgeshire and Peterborough	1.2%
Cornwall and Isles of Scilly	0.5%
Cotswolds Plus	1.3%
Devon	0.6%
Dorset	0.4%
Sussex	1.3%
Essex	0.9%
<b>Greater London</b>	<b>60.0%</b>
Hampshire	1.2%
Hertfordshire	1.0%
Isle of Wight	0.1%
Kent	1.0%
Norfolk and Suffolk	0.6%
Oxfordshire	2.7%
Somerset	1.0%
Surrey	0.9%
Wiltshire	0.4%
<b>TOTAL</b>	<b>78.4%</b>

- Looking across England, we can see that in 2023, Southern England destinations received the majority share of spend from inbound visitors. This was primarily due to Greater London, which received 60%. Within Southern England, the next most prominent destination was Oxfordshire, receiving just under 3%.
- Northern England received just under 9% of spend from inbound visitors in 2023. The destination receiving the most spend in that time was Greater Manchester, at just over 3%, followed by the Liverpool City region at just over 1%.
- Destinations in the Midlands received 5% of spend from inbound visitors in 2023, with Birmingham, Solihull and the Black Country most prominent at just over 1%.

All values and percentage changes in spend are in nominal terms unless otherwise specified. Please note that destination totals add up to more than 100% due to some overlap in destinations. Please refer to the appendix for details on destination definitions. Please note that this data covers in person spend only; online spend is not included.

# Spend share | Edinburgh and South East Scotland City Region taking largest share in Scotland, and South East Wales within Wales

## Spend share within Britain (2023)

Scottish destinations	Share of spend
Aberdeen City Region	0.5%
Ayrshires	0.1%
Edinburgh and South East Scotland City Region	4.9%
Forth Valley Region	0.3%
Glasgow City Region	2.0%
Highlands and Islands	2.2%
South of Scotland	0.2%
Tay Cities Region	1.0%
<b>TOTAL</b>	<b>11.3%</b>

Welsh destinations	Share of spend
Mid Wales	0.2%
North Wales	0.4%
South East Wales	0.8%
South West Wales	0.2%
<b>TOTAL</b>	<b>1.6%</b>

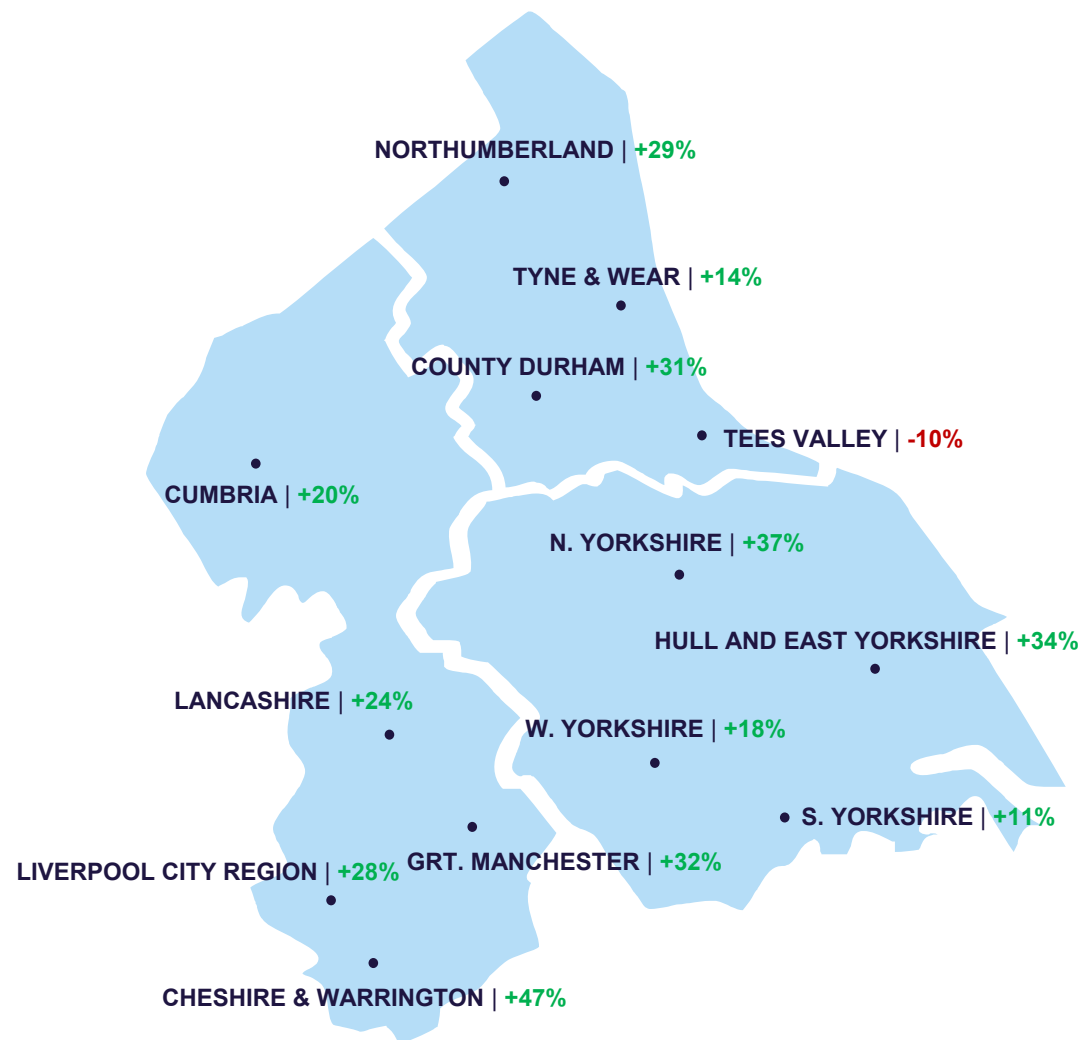
Scotland received just over 11% of spend by inbound visitors to Britain in 2023. Within this nation, the destination receiving the most spend was Edinburgh and South East Scotland City Region, at almost 5%. Following this was the Highlands and Islands at just over 2%. Wales received just under 2% of inbound spend to Britain in 2023, with South East Wales receiving the largest share at almost 1%.



# Spend growth | Northern England destinations seeing 27% across the region

## Spend growth (2023 vs. 2022)

- Across Northern England, we can mainly see growth when comparing 2023 with 2022. In fact, a total growth of 27% can be seen across the region year on year (19% in real terms).
- The strongest growth within the region can be seen from Cheshire & Warrington (47%), followed by North Yorkshire (37%) and East Yorkshire (34%).
- In contrast, Tees Valley saw a decline of 10% in spend from inbound visitors year on year.

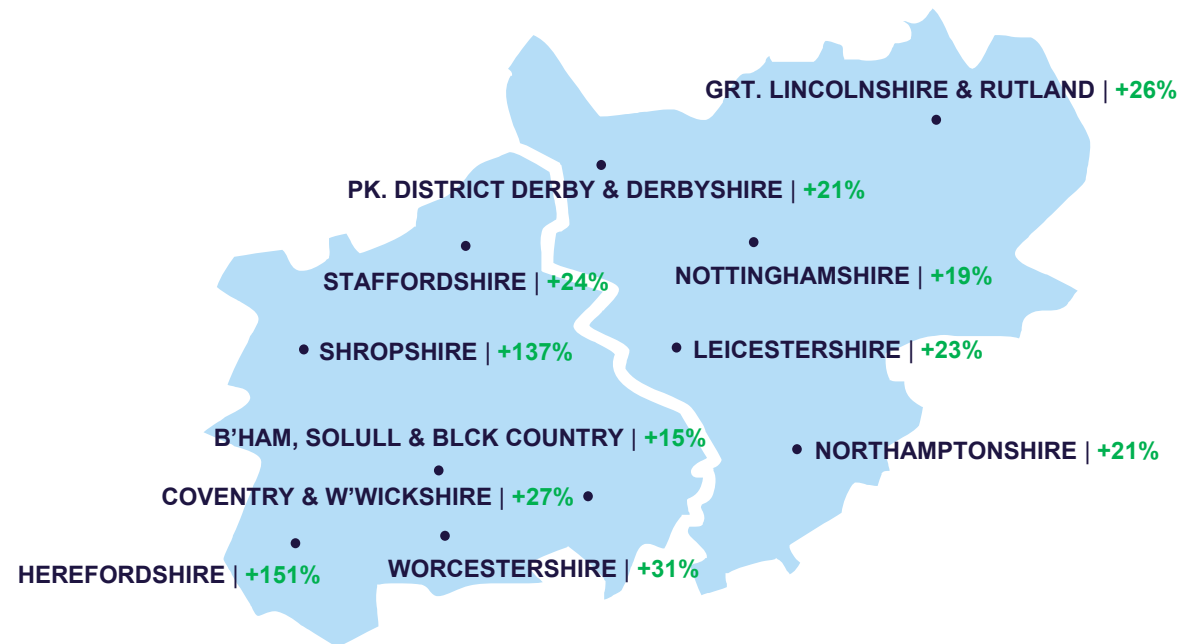


# Spend growth | Midlands seeing 30% growth, with Herefordshire and Shropshire leading

## Spend growth (2023 vs. 2022)

- Across the Midlands, we can also see year on year growth overall when it comes to spend from inbound visitors. In total across the region, we see a year on year growth of 30% (22% in real terms).
- The strongest growth within the region can be seen from Herefordshire (151%) and Shropshire (137%).
- In contrast, the lowest year on year growth can be seen from Birmingham, Solihull and the Black Country (15%).

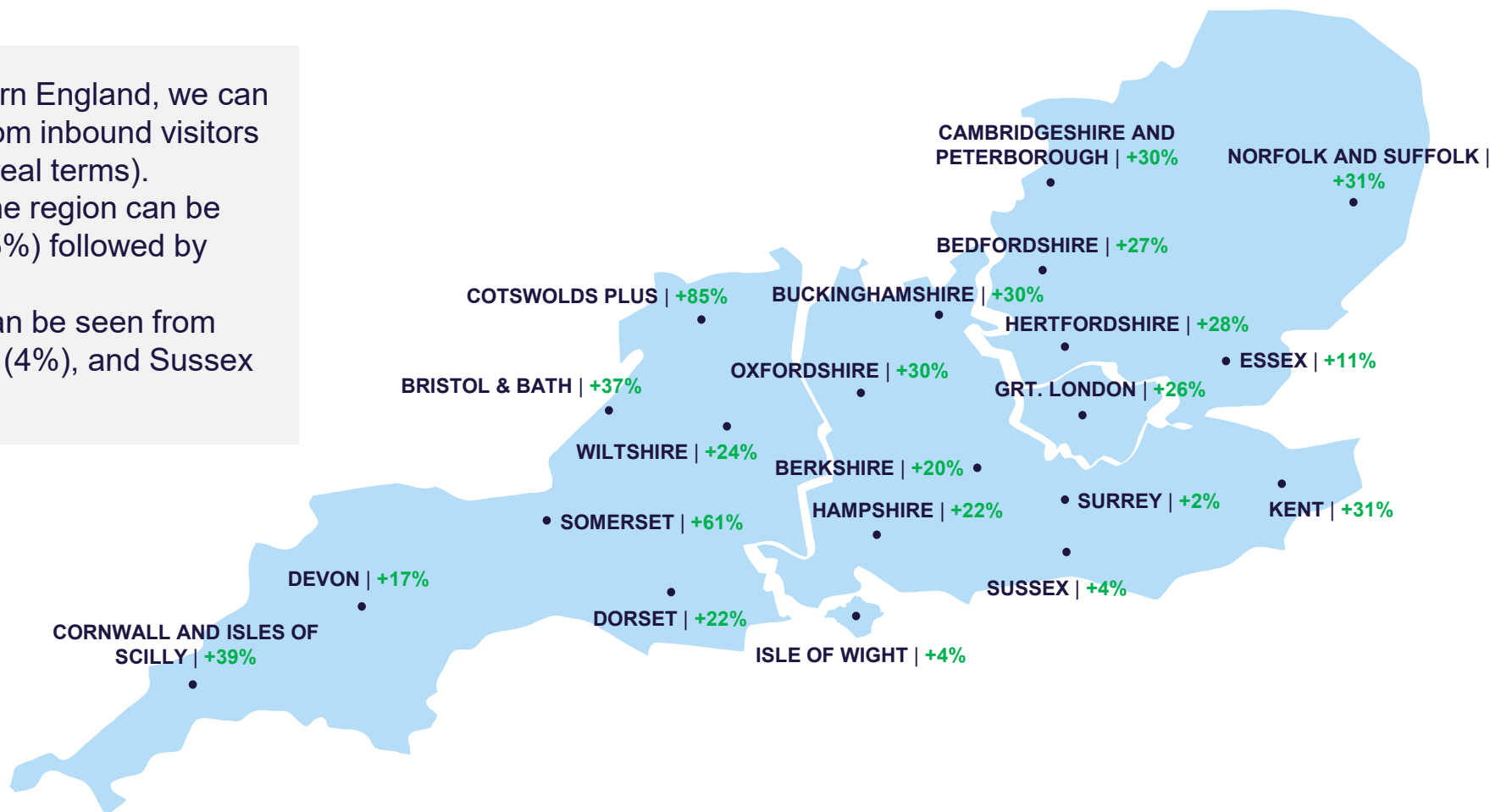
*Please note that Herefordshire's high 2023 figure is likely influenced by exceptionally high spending in transport from a US outlier. Shropshire's high 2023 figure is likely influenced by exceptionally high spending in retail from a US outlier.*



# Spend growth | 26% growth in total in Southern England, with Cotswolds Plus leading

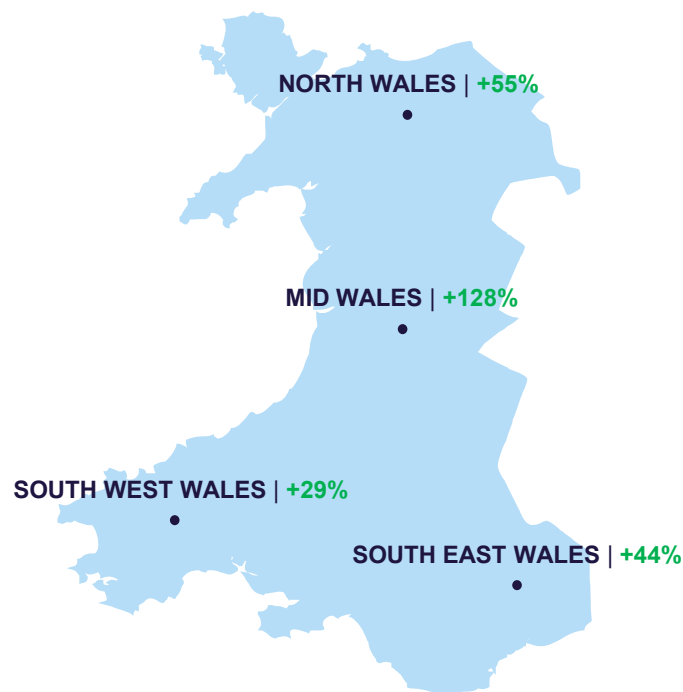
## Spend growth (2023 vs. 2022)

- Across destinations in Southern England, we can see a total growth in spend from inbound visitors of 26% year on year (18% in real terms).
- The strongest growth within the region can be seen from Cotswolds Plus (85%) followed by Somerset (61%).
- The lowest levels of growth can be seen from Surrey (2%), the Isle of Wight (4%), and Sussex (4%).

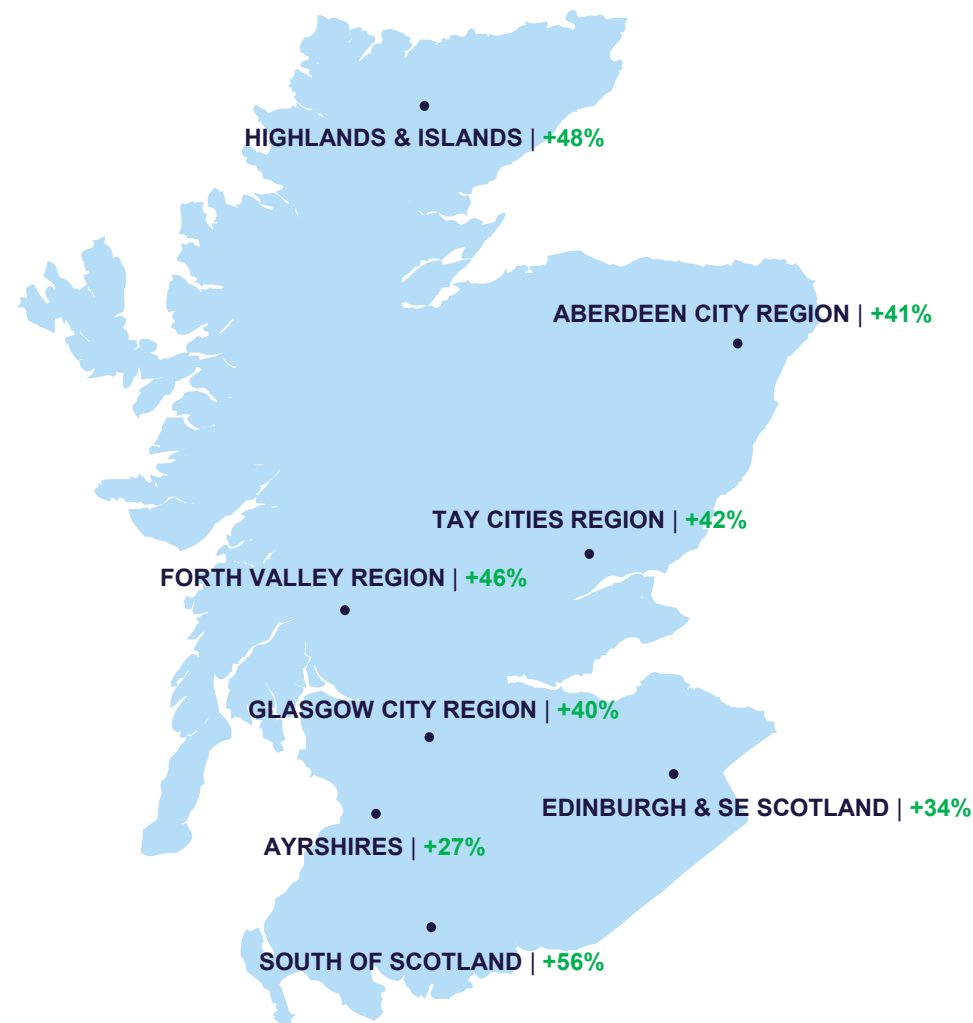


# Spend growth | 39% growth for Scotland on average, and 51% for Wales

## Spend growth (2023 vs. 2022)



- Both Scotland and Wales saw healthy year on year total growth in inbound visitor spend (39% and 51%; 30% and 41% in real terms).
- Within Scotland, the most growth can be seen from the South of Scotland (56%). Within Wales, the strongest growth was in Mid Wales (128%, influenced by particularly high spend in 2023 from Saudi, USA and French visitors in retail, and French visitors in restaurants & nightlife).



# Seasonality | Cumbria and Northumberland more likely than average to receive spend in the summer months

## Seasonal share of spend (2023)

Northern England counties	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cheshire and Warrington	6%	5%	7%	9%	8%	8%	11%	11%	10%	9%	8%	9%
Cumbria	4%	3%	5%	7%	10%	12%	15%	15%	11%	7%	5%	6%
County Durham	6%	5%	6%	6%	8%	8%	10%	9%	12%	12%	10%	8%
Hull and East Yorkshire	6%	6%	7%	8%	9%	9%	11%	11%	9%	9%	7%	9%
Greater Manchester	6%	6%	7%	8%	8%	8%	10%	10%	9%	10%	8%	10%
Lancashire	6%	5%	6%	7%	9%	8%	11%	12%	10%	10%	8%	8%
Liverpool City Region	5%	6%	7%	9%	9%	7%	10%	10%	10%	10%	7%	10%
North Yorkshire	5%	4%	5%	7%	9%	10%	12%	12%	11%	10%	7%	7%
Northumberland	4%	3%	4%	8%	11%	12%	14%	14%	11%	8%	5%	6%
South Yorkshire	7%	6%	6%	8%	7%	7%	9%	9%	11%	11%	10%	8%
Tees Valley	6%	6%	7%	7%	7%	7%	9%	9%	9%	9%	10%	13%
Tyne and Wear	6%	6%	6%	7%	8%	8%	11%	10%	11%	11%	8%	8%
West Yorkshire	7%	6%	7%	7%	8%	8%	10%	9%	11%	11%	9%	8%
<b>Britain average</b>	5%	5%	6%	7%	9%	9%	11%	11%	10%	9%	8%	9%
<b>Northern England average</b>	6%	5%	6%	8%	8%	9%	11%	11%	10%	10%	8%	8%

Across Northern England on average, the seasonal trend of inbound spend across 2023 stayed close to the Britain average, with some slight boosts of 1 percentage point in January, April, and October. Across the region, we can see that Cumbria and Northumberland over-index on visits from June to August (and under-index at the start and end of the year). The Tees Valley is also more likely than average to receive inbound spend in December.

# Seasonality | Several destinations in the Midlands receiving higher spend than average in the early part of the year

## Seasonal share of spend (2023)

Midlands destinations	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Birmingham, Solihull and the Black Country	7%	7%	8%	8%	8%	9%	9%	9%	9%	9%	9%	8%
Coventry & Warwickshire	6%	6%	7%	7%	8%	9%	10%	9%	10%	10%	8%	8%
Peak District Derbyshire and Derby	5%	5%	6%	8%	9%	10%	11%	11%	10%	9%	8%	8%
Greater Lincolnshire & Rutland	6%	5%	7%	7%	9%	9%	11%	12%	10%	9%	7%	8%
Herefordshire	7%	6%	7%	8%	10%	10%	9%	7%	9%	9%	8%	9%
Leicestershire	6%	6%	6%	7%	8%	7%	10%	9%	11%	11%	10%	9%
Northamptonshire	6%	6%	7%	8%	8%	9%	11%	10%	9%	9%	8%	9%
Nottinghamshire	6%	6%	7%	7%	7%	8%	10%	9%	12%	11%	9%	9%
Shropshire	7%	6%	7%	7%	9%	9%	10%	10%	9%	9%	7%	9%
Staffordshire	6%	5%	6%	7%	8%	9%	10%	11%	10%	9%	8%	9%
Worcestershire	5%	5%	6%	7%	9%	10%	11%	11%	11%	9%	7%	9%
<b>Britain average</b>	5%	5%	6%	7%	9%	9%	11%	11%	10%	9%	8%	9%
<b>Midlands average</b>	6%	6%	7%	7%	8%	9%	10%	10%	10%	10%	8%	9%

Across the Midlands on average, the seasonal trend of inbound spend across 2023 stayed close to the Britain average, with some slight boosts of 1 percentage point from January to March, and in October.

Across the region, we can see that Herefordshire under-indexes on spend received in August, instead over-indexing in January. Birmingham, Solihull and the Black Country sees a higher proportion of spend from January to March, with Shropshire also over-indexing in January. Leicestershire and Nottinghamshire also receive more spend than average in October and November.

# Seasonality | In Southern England, Cornwall and Isles of Scilly, Dorset, Devon, Sussex & Isle of Wight most likely to receive summer spend

## Seasonal share of spend (2023)

Southern England counties	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Bedfordshire	8%	6%	9%	7%	8%	9%	10%	9%	8%	8%	8%	9%
Berkshire	5%	5%	6%	8%	9%	11%	12%	10%	10%	9%	7%	8%
Bristol and Bath	5%	5%	6%	7%	9%	9%	12%	11%	12%	10%	8%	7%
Buckinghamshire	6%	5%	7%	7%	8%	9%	12%	12%	9%	9%	8%	9%
Cambridgeshire and Peterborough	5%	5%	6%	7%	8%	9%	13%	11%	10%	10%	8%	8%
Cornwall and Isles of Scilly	3%	2%	3%	7%	10%	13%	18%	17%	12%	7%	4%	4%
Cotswold Plus	5%	4%	7%	7%	9%	10%	12%	10%	10%	9%	7%	9%
Devon	5%	4%	5%	7%	9%	10%	14%	12%	11%	9%	7%	7%
Dorset	5%	4%	5%	7%	9%	11%	15%	13%	10%	8%	6%	6%
Sussex	5%	5%	6%	8%	9%	9%	14%	12%	10%	9%	7%	7%
Essex	7%	6%	7%	8%	8%	9%	10%	10%	9%	9%	8%	9%
Greater London	6%	5%	7%	7%	8%	9%	11%	10%	9%	9%	9%	10%
Hampshire	5%	5%	6%	7%	8%	9%	12%	11%	11%	10%	7%	8%
Hertfordshire	6%	5%	7%	8%	8%	8%	10%	10%	9%	10%	8%	10%
Isle of Wight	7%	5%	6%	8%	9%	10%	14%	12%	10%	9%	6%	6%
Kent	5%	5%	6%	8%	9%	9%	12%	12%	10%	9%	7%	9%
Norfolk and Suffolk	6%	6%	7%	7%	7%	8%	8%	9%	8%	8%	7%	7%
Oxfordshire	5%	5%	6%	7%	8%	9%	13%	11%	9%	9%	9%	9%
Somerset	5%	4%	6%	8%	10%	10%	12%	11%	11%	9%	7%	7%
Surrey	6%	6%	6%	7%	8%	9%	11%	10%	10%	9%	8%	9%
Wiltshire	5%	4%	5%	8%	10%	11%	13%	12%	10%	8%	7%	8%
<b>Britain average</b>	5%	5%	6%	7%	9%	9%	11%	11%	10%	9%	8%	9%
<b>South average</b>	5%	5%	6%	7%	9%	10%	12%	11%	10%	9%	7%	8%

Across Southern England, we can see that Cornwall and Isles of Scilly over-indexes compared to the Britain average when it comes to spend from inbound visitors received from July to August 2023. Dorset, Devon, Sussex, and the Isle of Wight also saw over-indexing in July. In contrast Bedfordshire was more likely than average to receive inbound spend from January to March.

# Seasonality | Scotland and Wales seeing spend more concentrated in the summer months vs. Britain average

## Seasonal share of spend (2023)

Scottish destinations	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aberdeen City Region	5%	5%	6%	7%	10%	11%	11%	13%	12%	8%	7%	6%
Ayrshires	4%	3%	5%	8%	11%	11%	13%	15%	9%	7%	6%	7%
Edinburgh and South East Scotland City Region	4%	3%	5%	8%	10%	11%	13%	14%	12%	9%	6%	6%
Forth Valley Region	3%	3%	4%	7%	11%	11%	13%	16%	12%	9%	5%	5%
Glasgow City Region	4%	4%	5%	7%	9%	11%	11%	14%	11%	9%	7%	7%
Highlands and Islands	2%	2%	3%	7%	13%	13%	16%	18%	13%	8%	3%	2%
South of Scotland	5%	4%	7%	7%	11%	10%	10%	14%	10%	7%	5%	10%
Tay Cities Region	3%	2%	4%	7%	11%	12%	16%	15%	13%	8%	5%	4%
<b>Britain average</b>	<b>5%</b>	<b>5%</b>	<b>6%</b>	<b>7%</b>	<b>9%</b>	<b>9%</b>	<b>11%</b>	<b>11%</b>	<b>10%</b>	<b>9%</b>	<b>8%</b>	<b>9%</b>
<b>Scotland average</b>	<b>4%</b>	<b>3%</b>	<b>5%</b>	<b>7%</b>	<b>11%</b>	<b>11%</b>	<b>13%</b>	<b>15%</b>	<b>12%</b>	<b>8%</b>	<b>5%</b>	<b>6%</b>

Welsh destinations	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Mid Wales	5%	5%	6%	7%	9%	9%	12%	12%	10%	9%	8%	9%
North Wales	4%	4%	5%	8%	11%	12%	15%	14%	10%	7%	5%	5%
South East Wales	6%	6%	7%	8%	9%	8%	9%	10%	11%	10%	8%	8%
South West Wales	5%	5%	5%	7%	8%	11%	15%	14%	9%	8%	6%	6%
<b>Britain average</b>	<b>5%</b>	<b>5%</b>	<b>6%</b>	<b>7%</b>	<b>9%</b>	<b>9%</b>	<b>11%</b>	<b>11%</b>	<b>10%</b>	<b>9%</b>	<b>8%</b>	<b>9%</b>
<b>Wales average</b>	<b>5%</b>	<b>5%</b>	<b>6%</b>	<b>7%</b>	<b>9%</b>	<b>10%</b>	<b>13%</b>	<b>13%</b>	<b>10%</b>	<b>9%</b>	<b>7%</b>	<b>7%</b>

In contrast to the trend seen in England, Scotland and Wales are more likely to stray from the Britain average when it comes to seasonal share of spend from inbound visitors in 2023. On average, Scotland destinations over-index by 4 percentage points in August, with smaller over-indexes of 2 percentage points from May to July, and in September. Wales also over-indexes on average by 2 percentage points in July and August. Within Scotland, we can see the Highlands and Islands seeing a strong boost in proportion of spend received between May and September. Within Wales, we can see a similar tendency from North Wales and South Wales.



# Spending behaviour | Visitors to Northern England destinations more likely to use cash and spend on food and groceries

## Spend share among market segments (2023)

Northern England destinations	Automotive	Cash Withdrawal	Pharmacies	Entertainment	Food & Grocery	Fuel	Home Imp. & Supply	Hotels & Lodging	Restaurants & Nightlife	Retail	Transport	Travel Services
Cheshire and Warrington	1%	7%	1%	1%	11%	3%	2%	11%	21%	28%	12%	0.1%
Cumbria	1%	8%	1%	3%	12%	8%	2%	20%	26%	16%	4%	0.3%
County Durham	1%	10%	2%	1%	18%	5%	1%	17%	24%	16%	3%	1%
Hull and East Yorkshire	1%	14%	1%	1%	16%	4%	2%	8%	23%	23%	7%	0.2%
Greater Manchester	1%	7%	1%	4%	7%	1%	1%	12%	21%	28%	16%	0.0%
Lancashire	1%	13%	1%	3%	18%	5%	2%	12%	21%	19%	5%	0.2%
Liverpool City Region	0.3%	9%	1%	10%	9%	1%	1%	11%	32%	22%	4%	0.1%
North Yorkshire incl. York	1%	9%	2%	2%	15%	3%	1%	14%	26%	21%	5%	0.1%
Northumberland	1%	7%	1%	9%	20%	7%	1%	13%	28%	11%	2%	0.1%
South Yorkshire	1%	13%	1%	2%	17%	2%	16%	8%	17%	19%	3%	0.1%
Tees Valley	1%	14%	3%	1%	15%	4%	2%	11%	21%	15%	12%	0.0%
Tyne and Wear	1%	5%	2%	1%	12%	1%	1%	13%	25%	31%	8%	0.1%
West Yorkshire	1%	13%	2%	2%	16%	3%	2%	10%	23%	24%	5%	0.1%
Britain average	0%	6%	1%	3%	8%	1%	1%	17%	24%	30%	8%	1%
Northern England average	1%	10%	1%	3%	14%	4%	3%	12%	24%	21%	7%	0%

We can see some quite marked differences in what inbound visitors spend their money on in Northern England destinations compared to the Britain average. Generally, we can see over-indexing in the 'cash withdrawal' and 'food and grocery' categories. Most likely to over-index in 'food and grocery' are visitors to Northumberland, County Durham and Lancashire. Beyond this, we can see a particularly high propensity for visitors to South Yorkshire to spend on 'home improvement and supply' (this is likely due to an exceptionally high spender in this category from the Republic of Ireland). Greater Manchester also over-indexes for 'transport', and Liverpool City Region for 'restaurants and dining'.

# Spending behaviour | Similar trends for the Midlands, with over-indexing on cash withdrawal and food and grocery

## Spend share among market segments (2023)

Midlands counties	Automotive	Cash Withdrawal	Pharmacies	Entertainment	Food & Grocery	Fuel	Home Imp. & Supply	Hotels & Lodging	Restaurants & Nightlife	Retail	Transport	Travel Services
Birmingham, Solihull and the Black Country	1%	11%	2%	2%	10%	2%	3%	12%	19%	33%	6%	0.1%
Coventry & Warwickshire	1%	14%	4%	2%	17%	3%	1%	9%	18%	29%	2%	0.0%
Peak District Derbyshire and Derby	1%	17%	1%	4%	16%	4%	2%	12%	21%	17%	4%	0.1%
Greater Lincolnshire & Rutland	2%	11%	1%	4%	20%	4%	2%	13%	17%	20%	4%	0.2%
Herefordshire	1%	2%	2%	1%	11%	2%	1%	3%	18%	20%	39%	0.0%
Leicestershire	2%	12%	2%	1%	17%	3%	6%	9%	19%	25%	3%	0.1%
Northamptonshire	2%	10%	1%	1%	20%	4%	2%	8%	17%	29%	6%	0.1%
Nottinghamshire	1%	12%	2%	7%	15%	3%	2%	7%	21%	24%	5%	0.1%
Shropshire	1%	4%	0%	1%	9%	2%	2%	3%	7%	70%	1%	0.1%
Staffordshire	2%	11%	1%	3%	15%	5%	3%	11%	21%	25%	3%	0.1%
Worcestershire	2%	8%	1%	1%	18%	4%	3%	14%	22%	22%	6%	0.1%
Britain average	0%	6%	1%	3%	8%	1%	1%	17%	24%	30%	8%	1%
Midlands average	2%	10%	2%	2%	15%	3%	2%	9%	18%	29%	7%	0%

Similarly to what is seen for Northern England destinations, inbound visitors to Midlands destinations over-index on using cash for their purchases, and for spending on food and grocery. To a lesser extent, we also see a higher likelihood to spend on 'fuel' and 'home improvement and supply'.

*Please note that Herefordshire's 2023 trends are likely influenced by exceptionally high spending in transport from a US outlier. Shropshire's 2023 trends are likely influenced by exceptionally high spending in retail from a US outlier.*

# Spending behaviour | Southern England counties see some over-indexing in 'retail' and 'transport'

## Spend share among market segments (2023)

Southern England counties	Automotive	Cash Withdrawal	Pharmacies	Entertainment	Food & Grocery	Fuel	Home Imp. & Supply	Hotels & Lodging	Restaurants & Nightlife	Retail	Transport	Travel Services
Bedfordshire	2%	7%	2%	1%	8%	3%	1%	8%	20%	28%	22%	0.0%
Berkshire	1%	8%	1%	4%	11%	3%	2%	18%	23%	22%	7%	0.1%
Bristol and Bath	1%	6%	1%	1%	11%	2%	2%	15%	30%	24%	6%	0.0%
Buckinghamshire	2%	11%	1%	2%	17%	5%	4%	12%	17%	23%	6%	0.1%
Cambridgeshire and Peterborough	2%	7%	1%	4%	13%	2%	1%	11%	26%	26%	7%	0.1%
Cornwall and Isles of Scilly	1%	6%	1%	2%	18%	6%	2%	14%	33%	14%	3%	0.2%
Cotswolds Plus	1%	3%	5%	2%	11%	2%	1%	12%	25%	31%	7%	0.0%
Devon	1%	9%	1%	1%	16%	4%	3%	13%	21%	26%	4%	0.2%
Dorset	1%	10%	1%	3%	16%	3%	2%	10%	32%	16%	6%	0.1%
Sussex	1%	8%	2%	3%	14%	2%	2%	12%	29%	18%	7%	2%
Essex	2%	7%	1%	1%	9%	3%	1%	9%	21%	21%	24%	0.0%
Greater London	0%	5%	1%	2%	6%	0.2%	1%	19%	25%	33%	7%	1%
Hampshire	2%	9%	5%	3%	13%	3%	2%	15%	19%	18%	11%	0.1%
Hertfordshire	1%	6%	1%	12%	9%	3%	1%	12%	17%	33%	4%	0.1%
Isle of Wight	1%	10%	1%	3%	17%	2%	2%	9%	29%	17%	8%	0.0%
Kent	2%	11%	1%	4%	14%	4%	2%	6%	20%	22%	14%	0.1%
Norfolk and Suffolk	4%	11%	4%	2%	24%	3%	3%	7%	18%	20%	4%	0.2%
Oxfordshire	0.3%	3%	1%	1%	7%	1%	1%	6%	15%	63%	3%	0.1%
Somerset	0.4%	5%	2%	1%	14%	2%	2%	10%	28%	32%	3%	0.0%
Surrey	1%	7%	1%	3%	11%	4%	2%	8%	19%	15%	28%	0.1%
Wiltshire	3%	8%	1%	2%	16%	6%	2%	13%	24%	18%	7%	0.1%
Britain average	0%	6%	1%	3%	8%	1%	1%	17%	24%	30%	8%	1%
South average	1%	8%	2%	3%	13%	3%	2%	11%	23%	25%	9%	0%

Inbound visitor spend in Southern England destinations tends to stay closer to the Britain average, however we see strong over-indexing on spend on 'retail' in Oxfordshire, in addition to boosted 'transport' spend in Bedfordshire, Essex, and Surrey.

All values and percentage changes in spend are in nominal terms unless otherwise specified. Please refer to the appendix for details on destination definitions. Please note that this data covers in person spend only; online spend is not included. The 'Wholesale clubs' category is not included due to particularly low share.

# Spending behaviour | Food and grocery and fuel over-indexing for Scotland, with inbound visitors to Wales highly likely to spend on 'retail'

## Spend share among market segments (2023)

Scottish region	Automotive	Cash Withdrawal	Pharmacies	Entertainment	Food & Grocery	Fuel	Home Imp. & Supply	Hotels & Lodging	Restaurants & Nightlife	Retail	Transport	Travel Services
Aberdeen City Region	1%	8%	1%	1%	11%	3%	1%	19%	24%	23%	6%	0.1%
Ayrshires	1%	12%	2%	2%	22%	5%	3%	17%	15%	17%	4%	0.0%
Edinburgh and South East Scotland City Region	0.2%	5%	1%	3%	8%	1%	0.4%	18%	32%	22%	9%	1%
Forth Valley Region	1%	8%	1%	11%	12%	6%	1%	14%	26%	17%	4%	2%
Glasgow City Region	1%	6%	1%	1%	10%	2%	1%	14%	24%	19%	21%	0.2%
Highlands and Islands	1%	5%	1%	6%	13%	7%	1%	22%	23%	18%	4%	0.4%
South of Scotland	1%	8%	0.3%	1%	11%	6%	1%	12%	13%	44%	2%	0.1%
Tay Cities Region	1%	10%	1%	8%	11%	3%	1%	18%	21%	22%	3%	0.2%
<b>Britain average</b>	<b>0%</b>	<b>6%</b>	<b>1%</b>	<b>3%</b>	<b>8%</b>	<b>1%</b>	<b>1%</b>	<b>17%</b>	<b>24%</b>	<b>30%</b>	<b>8%</b>	<b>1%</b>
<b>Scotland average</b>	<b>1%</b>	<b>8%</b>	<b>1%</b>	<b>4%</b>	<b>12%</b>	<b>4%</b>	<b>1%</b>	<b>17%</b>	<b>22%</b>	<b>23%</b>	<b>7%</b>	<b>0%</b>

Welsh region	Automotive	Cash Withdrawal	Pharmacies	Entertainment	Food & Grocery	Fuel	Home Imp. & Supply	Hotels & Lodging	Restaurants & Nightlife	Retail	Transport	Travel Services
Mid Wales	1%	5%	0.3%	1%	10%	4%	1%	6%	21%	50%	1%	0.1%
North Wales	1%	6%	1%	3%	12%	5%	1%	16%	19%	35%	3%	0.2%
South East Wales	1%	7%	1%	1%	10%	4%	1%	9%	18%	42%	6%	0.1%
South West Wales	1%	12%	1%	2%	19%	5%	2%	11%	22%	20%	5%	0.1%
<b>Britain average</b>	<b>0%</b>	<b>6%</b>	<b>1%</b>	<b>3%</b>	<b>8%</b>	<b>1%</b>	<b>1%</b>	<b>17%</b>	<b>24%</b>	<b>30%</b>	<b>8%</b>	<b>1%</b>
<b>Wales average</b>	<b>1%</b>	<b>8%</b>	<b>1%</b>	<b>2%</b>	<b>13%</b>	<b>5%</b>	<b>1%</b>	<b>11%</b>	<b>20%</b>	<b>37%</b>	<b>4%</b>	<b>0%</b>

Similarly to some English destinations, Scotland sees inbound visitors more likely than average to spend on 'food and grocery' with 'fuel' also over-indexing. In contrast, inbound visitors to Wales are most likely to over-index on 'retail' and this is seen across destinations. In Scotland, we can also see inbound visitors to the South of Scotland displaying a boost for 'retail' and those to the Glasgow City Region for 'transport'.

# Origin markets | British nations

## Top origin markets according to spend (2023)

British nations	1	2	3	4	5
England (including Greater London)	USA	Republic of Ireland	France	Saudi Arabia	Australia
Scotland	USA	Republic of Ireland	France	Germany	Australia
Wales	USA	Republic of Ireland	France	Germany	Australia
<b>Britain average</b>	<b>USA</b>	<b>Republic of Ireland</b>	<b>France</b>	<b>Saudi Arabia</b>	<b>Australia</b>

When looking at the three British nations, top origin markets by spend in 2023 are very similar, with Scotland and Wales displaying an identical top 5. England (including Greater London) sees a slightly different pattern, with Saudi Arabia in fourth place rather than Germany.

# Origin markets | Northern England destinations

## Top origin markets according to spend (2023)

Northern England destinations	1	2	3	4	5
Cheshire and Warrington	USA	Republic of Ireland	China Mainland	Australia	France
Cumbria	USA	Republic of Ireland	Australia	Germany	Canada
County Durham	USA	China Mainland	Republic of Ireland	Australia	Germany
Hull and East Yorkshire	USA	Republic of Ireland	Germany	Australia	France
Greater Manchester	Republic of Ireland	USA	France	China Mainland	Saudi Arabia
Lancashire	USA	Republic of Ireland	Australia	Germany	China Mainland
Liverpool City Region	Republic of Ireland	USA	Norway	Australia	France
North Yorkshire	USA	Australia	Republic of Ireland	China Mainland	Canada
Northumberland	USA	Republic of Ireland	Australia	Germany	Canada
South Yorkshire	Republic of Ireland	USA	China Mainland	Australia	India
Tees Valley	USA	Republic of Ireland	Australia	Germany	India
Tyne and Wear	USA	Republic of Ireland	China Mainland	Australia	Saudi Arabia
West Yorkshire	USA	Republic of Ireland	China Mainland	Australia	India
<b>Britain average</b>	<b>USA</b>	<b>Republic of Ireland</b>	<b>France</b>	<b>Saudi Arabia</b>	<b>Australia</b>

The most prominent top ranked origin markets across Northern England destinations are the USA and Republic of Ireland, followed by Australia and China Mainland. An unusual entrant to the top rankings, only appearing for one region, is Norway (ranked 3<sup>rd</sup> for Liverpool City Region).

# Origin markets | Midlands destinations

## Top origin markets according to spend (2023)

Midlands destinations	1	2	3	4	5
Birmingham, Solihull and the Black Country	Republic of Ireland	USA	China Mainland	India	France
Coventry & Warwickshire	USA	India	Republic of Ireland	China Mainland	France
Peak District Derbyshire and Derby	USA	Republic of Ireland	Australia	France	Germany
Greater Lincolnshire & Rutland	USA	Republic of Ireland	Australia	France	Germany
Herefordshire	USA	Republic of Ireland	Australia	Canada	France
Leicestershire	USA	Republic of Ireland	India	China Mainland	Australia
Northamptonshire	USA	Republic of Ireland	France	Romania	Australia
Nottinghamshire	USA	Republic of Ireland	China Mainland	India	Australia
Shropshire	USA	Republic of Ireland	India	France	Australia
Staffordshire	USA	Republic of Ireland	Australia	France	Germany
Worcestershire	USA	Republic of Ireland	Australia	France	Germany
<b>Britain average</b>	<b>USA</b>	<b>Republic of Ireland</b>	<b>France</b>	<b>Saudi Arabia</b>	<b>Australia</b>

Similarly to in Northern England, the Midlands sees the USA and Republic of Ireland featuring most often in top 5 rankings for inbound markets. Following this are France and Australia. India is more likely to be included in top 5 rankings in the Midlands than in Northern England. Two markets are included only once each; Canada (ranked 4<sup>th</sup> in Herefordshire), and Romania (ranked 4<sup>th</sup> in Northamptonshire).

# Origin markets | Southern England destinations

## Top origin markets according to spend (2023)

Southern England destinations	1	2	3	4	5
Bedfordshire	Republic of Ireland	USA	Romania	Poland	France
Berkshire	USA	Republic of Ireland	Australia	India	France
Bristol and Bath	USA	Republic of Ireland	France	Australia	Spain
Buckinghamshire	USA	Spain	Republic of Ireland	Gibraltar	Australia
Cambridgeshire and Peterborough	USA	Republic of Ireland	China Mainland	Germany	France
Cornwall and Isles of Scilly	USA	Germany	Australia	Republic of Ireland	France
Cotswolds Plus	USA	Republic of Ireland	Australia	France	Canada
Devon	USA	Republic of Ireland	Germany	Australia	France
Dorset	USA	Republic of Ireland	Saudi Arabia	Germany	Australia
Sussex	USA	France	Republic of Ireland	Germany	Australia
Essex	Republic of Ireland	USA	Spain	Germany	France
Greater London	USA	Saudi Arabia	France	UAE	Republic of Ireland
Hampshire	USA	Republic of Ireland	Australia	France	Germany
Hertfordshire	USA	Republic of Ireland	France	Australia	Germany
Isle of Wight	USA	Germany	France	Australia	Republic of Ireland
Kent	USA	France	Republic of Ireland	Germany	Australia
Norfolk and Suffolk	USA	Republic of Ireland	Australia	France	Germany
Oxfordshire	USA	China Mainland	Saudi Arabia	UAE	Kuwait
Somerset	USA	Australia	Republic of Ireland	France	Germany
Surrey	USA	Republic of Ireland	Australia	France	Spain
Wiltshire	USA	Republic of Ireland	Australia	Germany	France
<b>Britain average</b>	<b>USA</b>	<b>Republic of Ireland</b>	<b>France</b>	<b>Saudi Arabia</b>	<b>Australia</b>

In Southern England, the USA is most likely to appear in top 5 ranked origin markets, followed by the Republic of Ireland, France, and Australia. Compared to Northern and the Midlands, this region sees more prominence of the Gulf markets, with Saudi Arabia, the UAE, and Kuwait appearing. Alongside Kuwait, other markets included only once are Gibraltar (ranked 4<sup>th</sup> for Buckinghamshire) and India (ranked 4<sup>th</sup> for Berkshire).

All values and percentage changes in spend are in nominal terms unless otherwise specified. Please refer to the appendix for details on destination definitions. Please note that this data covers in person spend only; online spend is not included



# Origin markets | Scotland & Wales destinations

## Top origin markets according to spend (2023)

Scottish destinations	1	2	3	4	5
Aberdeen City Region	USA	Republic of Ireland	Norway	Australia	Germany
Ayrshires	USA	Republic of Ireland	Canada	Australia	France
Edinburgh and South East					
Scotland City Region	USA	Republic of Ireland	France	Germany	Canada
Forth Valley Region	USA	France	Germany	Republic of Ireland	Australia
Glasgow City Region	USA	Republic of Ireland	France	Australia	Canada
Highlands and Islands	USA	Germany	France	Australia	Canada
South of Scotland	UAE	USA	Republic of Ireland	Australia	Germany
Tay Cities Region	USA	Canada	France	Australia	Republic of Ireland
<b>Britain average</b>	<b>USA</b>	<b>Republic of Ireland</b>	<b>France</b>	<b>Saudi Arabia</b>	<b>Australia</b>

Welsh destinations	1	2	3	4	5
Mid Wales	USA	France	Saudi Arabia	Republic of Ireland	China Mainland
North Wales	Republic of Ireland	USA	Germany	France	Australia
South East Wales	USA	Republic of Ireland	China Mainland	Australia	France
South West Wales	USA	Republic of Ireland	Germany	Australia	France
<b>Britain average</b>	<b>USA</b>	<b>Republic of Ireland</b>	<b>France</b>	<b>Saudi Arabia</b>	<b>Australia</b>

After the USA, the most prominent origin markets to be top 5 ranked for Scottish regions are the Republic of Ireland and Australia. The UAE appears only once, ranked 1<sup>st</sup> for the South of Scotland. In Wales, the USA, France, and Republic of Ireland all appear most often in top 5 rankings, with Saudi Arabia appearing only once (ranked 3<sup>rd</sup> for Mid Wales).

# Appendix



# Britain destinations | Definition by local authority (LAU1)

Northern England destinations	Local authority
Cheshire and Warrington	Cheshire East, Cheshire West and Cheshire, Warrington UA
Cumbria	Allerdale, Barrow-in-Furness, Carlisle, Copeland, Eden, South Lakeland
County Durham	Durham
Hull and East Yorkshire	East Riding of Yorkshire, Kingston Upon Hull, City of UA
Greater Manchester	Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford, Wigan
Lancashire	Blackburn with Darwen UA, Blackpool UA, Burnley, Chorley, Fylde, Hyndburn, Lancaster, Pendle, Preston, Ribble Valley, Rossendale, South Ribble, West Lancashire, Wyre
Liverpool City Region	Halton UA, Knowsley, Liverpool, St Helens, Sefton, Wirral
North Yorkshire incl. York	Craven, Hambleton, Harrogate, Richmondshire, Ryedale, Scarborough, Selby, York UA
Northumberland	Northumberland
South Yorkshire	Barnsley, Doncaster, Rotherham, Sheffield
Tees Valley	Darlington UA, Stockton-on-Tees UA, Hartlepool UA, Redcar and Cleveland UA, Middlesborough UA
Tyne and Wear	Gateshead, Newcastle upon Tyne, North Tyneside, South Tyneside, Sunderland
West Yorkshire	Bradford, Calderdale, Kirklees, Leeds, Wakefield
Midlands destinations	Local authority
Birmingham, Solihull and the Black Country	Birmingham, Dudley, Sandwell, Solihull, Walsall, Wolverhampton
Coventry & Warwickshire	North Warwickshire, Nuneaton and Bedworth, Rugby, Stratford-on-Avon, Warwick, Coventry
Peak District Derbyshire and Derby	Amber Valley, Bolsover, Chesterfield, Derby UA, Derbyshire Dales, Erewash, High Peak, North East Derbyshire, South Derbyshire
Greater Lincolnshire & Rutland	Rutland UA, Boston, East Lindsey, Lincoln, North East Lincolnshire, North Kesteven, North Lincolnshire, South Holland, South Kesteven, West Lindsey
Herefordshire	Herefordshire
Leicestershire	Blaby, Charnwood, Harborough, Hinckley and Bosworth, Leicester UA, Melton, North West Leicestershire, Oadby and Wigston
Northamptonshire	Daventry, Northampton, South Northamptonshire, Corby, East Northamptonshire, Kettering, Wellingborough
Nottinghamshire	Ashfield, Bassetlaw, Broxtowe, Gedling, Mansfield, Newark and Sherwood, Nottingham, Rushcliffe
Shropshire	Shropshire, Telford and Wrekin UA
Staffordshire	Cannock Chase, East Staffordshire, Lichfield, Newcastle-under-Lyme, South Staffordshire, Stafford, Staffordshire Moorlands, Stoke-on-Trent UA, Tamworth
Worcestershire	Bromsgrove, Malvern Hills, Redditch, Worcester, Wychavon, Wyre Forest

# Britain destinations | Definition by local authority (LAU1)

Southern England destinations	Local authority
Bedfordshire	Bedford, Central Bedfordshire, Luton UA
Berkshire	Bracknell Forest UA, Reading UA, Slough UA, West Berkshire UA, Windsor and Maidenhead UA, Wokingham UA
Bristol and Bath	Bath and North East Somerset UA, North Somerset UA, Bristol, City of UA, South Gloucestershire
Buckinghamshire	Buckinghamshire Council, Milton Keynes UA
Cambridgeshire and Peterborough	Cambridge, East Cambridgeshire, Fenland, Huntingdonshire, Peterborough UA, South Cambridgeshire
Cornwall and Isles of Scilly	Cornwall, Isles of Scilly
Cotswolds Plus	Cheltenham, Cotswold, Forest of Dean, Gloucester, South Gloucestershire UA, Stroud, Tewkesbury, West Oxfordshire
Devon	East Devon, Exeter, Mid Devon, North Devon, Plymouth UA, South Hams, Teignbridge, Torbay UA, Torridge, West Devon
Dorset	Bournemouth, Christchurch and Poole, Dorset
Sussex	Brighton and Hove UA, Eastbourne, Hastings, Lewes, Rother, Wealden, Adur, Arun, Chichester, Crawley, Horsham, Mid Sussex, Worthing
Essex	Basildon, Braintree, Brentwood, Castle Point, Chelmsford, Colchester, Epping Forest, Harlow, Maldon, Rochford, Southend-on-Sea UA, Tendring, Thurrock UA, Uttlesford
Greater London	City of London, Inner London boroughs, Outer London boroughs
Hampshire	Basingstoke and Deane, East Hampshire, Eastleigh, Fareham, Gosport, Hart, Havant, New Forest, Portsmouth UA, Rushmoor, Southampton UA, Test Valley, Winchester
Hertfordshire	Broxbourne, Dacorum, East Hertfordshire, Hertsmere, North Hertfordshire, St Albans, Stevenage, Three Rivers, Watford, Welwyn Hatfield
Isle of Wight	Isle of Wight UA
Kent	Ashford, Canterbury, Dartford, Dover, Gravesham, Maidstone, Medway, Sevenoaks, Folkestone and Hythe, Swale, Thanet, Tonbridge and Malling, Tunbridge Wells
Norfolk and Suffolk	Breckland, Broadland, Great Yarmouth, King's Lynn and West Norfolk, North Norfolk, Norwich, South Norfolk, Babergh, East Suffolk, Ipswich, Mid Suffolk, West Suffolk
Oxfordshire	Cherwell, Oxford, South Oxfordshire, Vale of White Horse
Somerset	Mendip, Sedgemoor, South Somerset, Somerset West and Taunton
Surrey	Elmbridge, Epsom and Ewell, Guildford, Mole Valley, Reigate and Banstead, Runnymede, Spelthorne, Surrey Heath, Tandridge, Waverley, Woking
Wiltshire	Swindon UA, Wiltshire

# Britain destinations | Definition by local authority (LAU1)

Scottish destinations	Local authority
Aberdeen City Region	Aberdeen City, Aberdeenshire
Ayrshires	East Ayrshire, North Ayrshire mainland, South Ayrshire
Edinburgh and South East Scotland City Region	City of Edinburgh, East Lothian, Fife, Midlothian, Scottish Borders, West Lothian
Forth Valley Region	Clackmannanshire, Falkirk, Stirling
Glasgow City Region	East Dunbartonshire, East Renfrewshire, Glasgow City, Helensburgh and Lomond, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire, West Dunbartonshire
Highlands and Islands	Argyll and Bute Islands, Argyll and Bute Mainland, Arran and Cumbrae, Badenoch and Strathspey, Caithness and Sutherland, Inverness and Nairn, Lochaber, Na h-Eileanan Siar, North East Moray, Orkney Islands, Ross and Cromarty, Shetland Islands, Skye and Lochalsh, West Moray
South of Scotland	Dumfries and Galloway, Scottish Borders
Tay Cities Region	Angus, Dundee City, Fife, Perth and Kinross

Welsh destinations	Local authority
Mid Wales	Ceredigion, Powys
North Wales	Isle of Anglesey, Gwynedd, Conwy, Denbighshire, Flintshire, Wrexham
South East Wales	Bridgend, Vale of Glamorgan, Cardiff, Rhondda Cynon Taf, Caerphilly, Blaenau Gwent, Torfaen, Monmouthshire, Newport, Merthyr Tydfil
South West Wales	Pembrokeshire, Carmarthenshire, Swansea, Neath Port Talbot