

ETOA

Inbound tourism to Britain and Ireland: Trends and Prospects

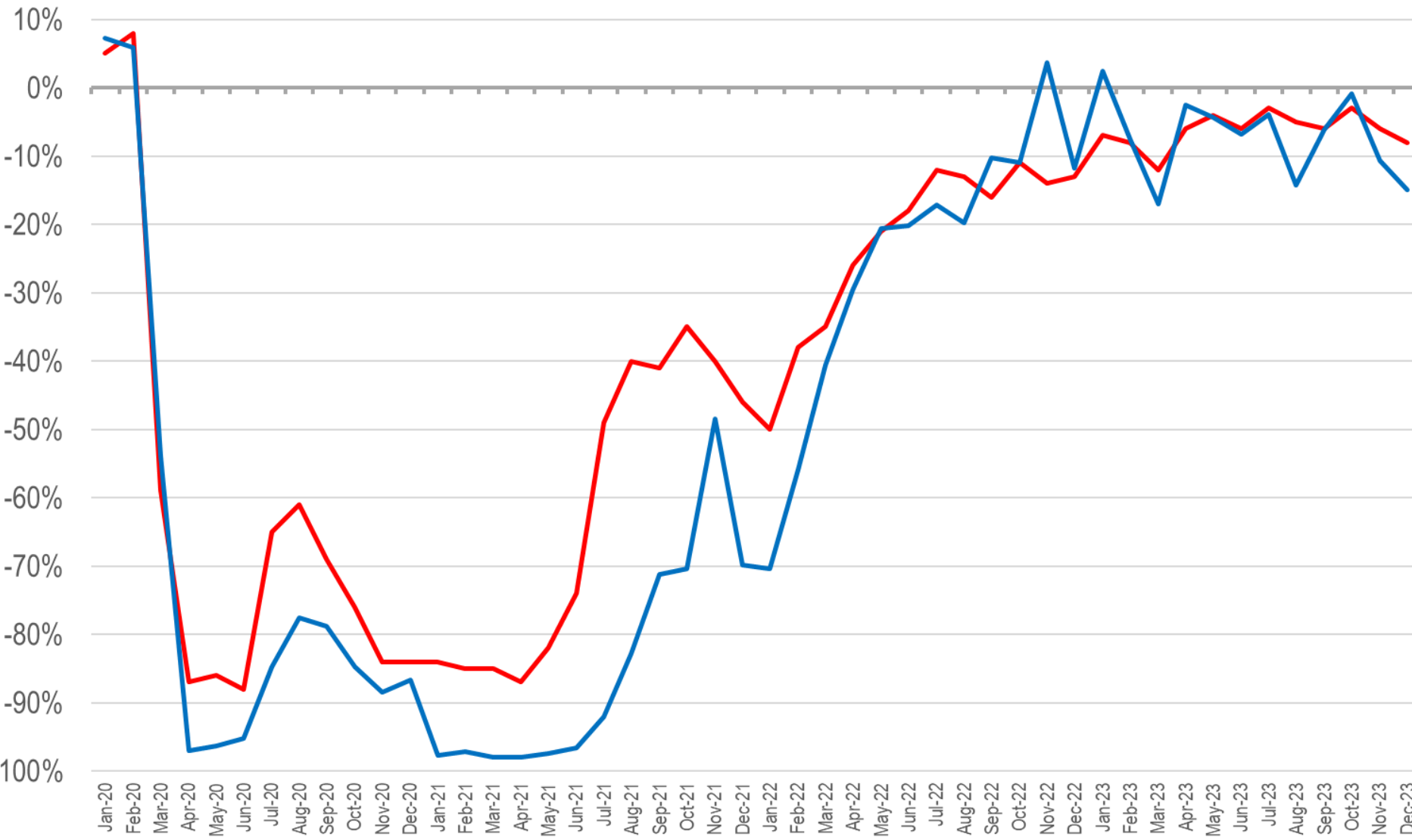
May 2024



Coming up...

- Recent inbound trends
- Latest forecasts
- The US market

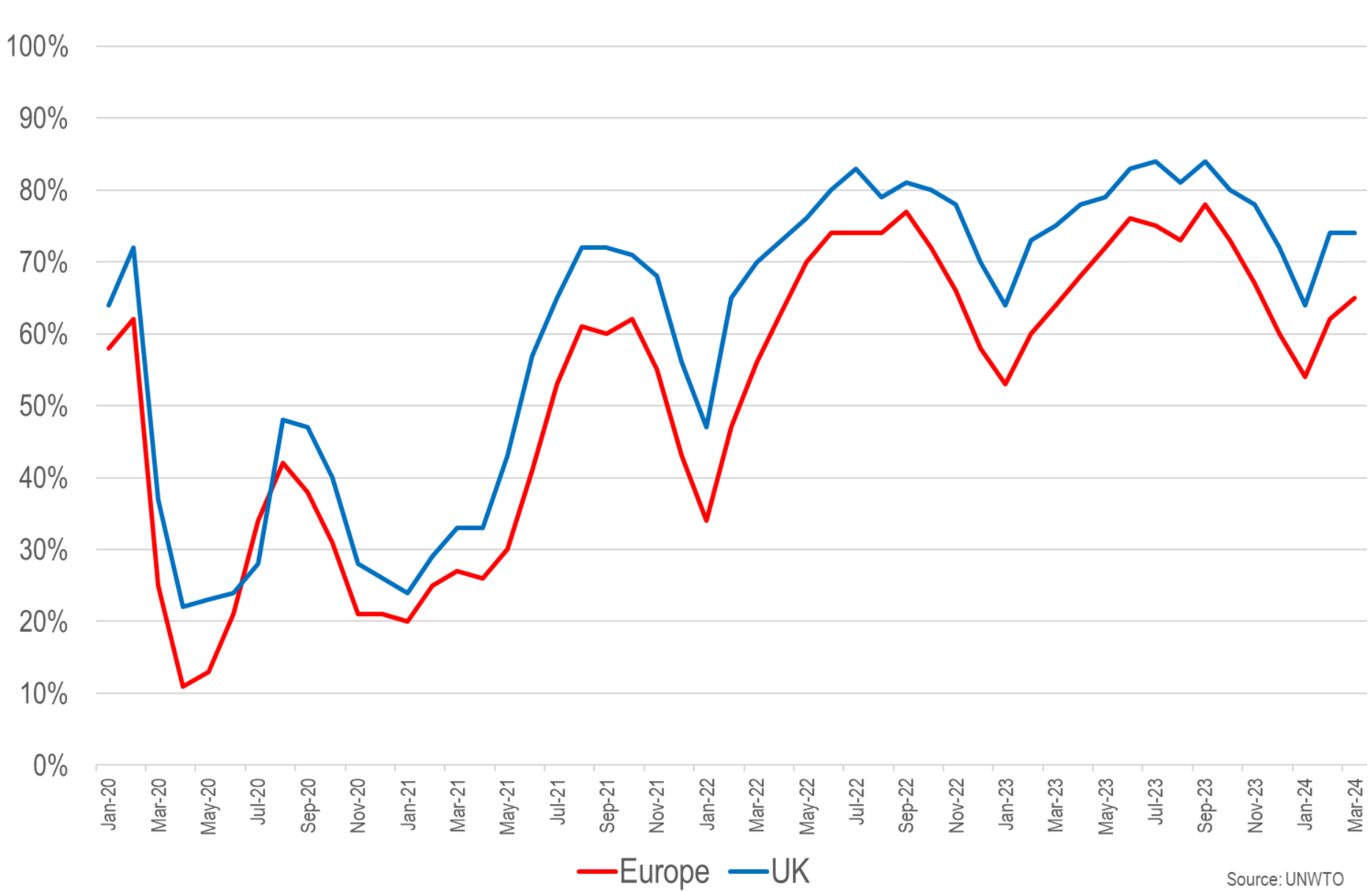
International arrivals in Europe and UK vs equivalent month in 2019



— Europe — UK

Source: UNWTO, VisitBritain

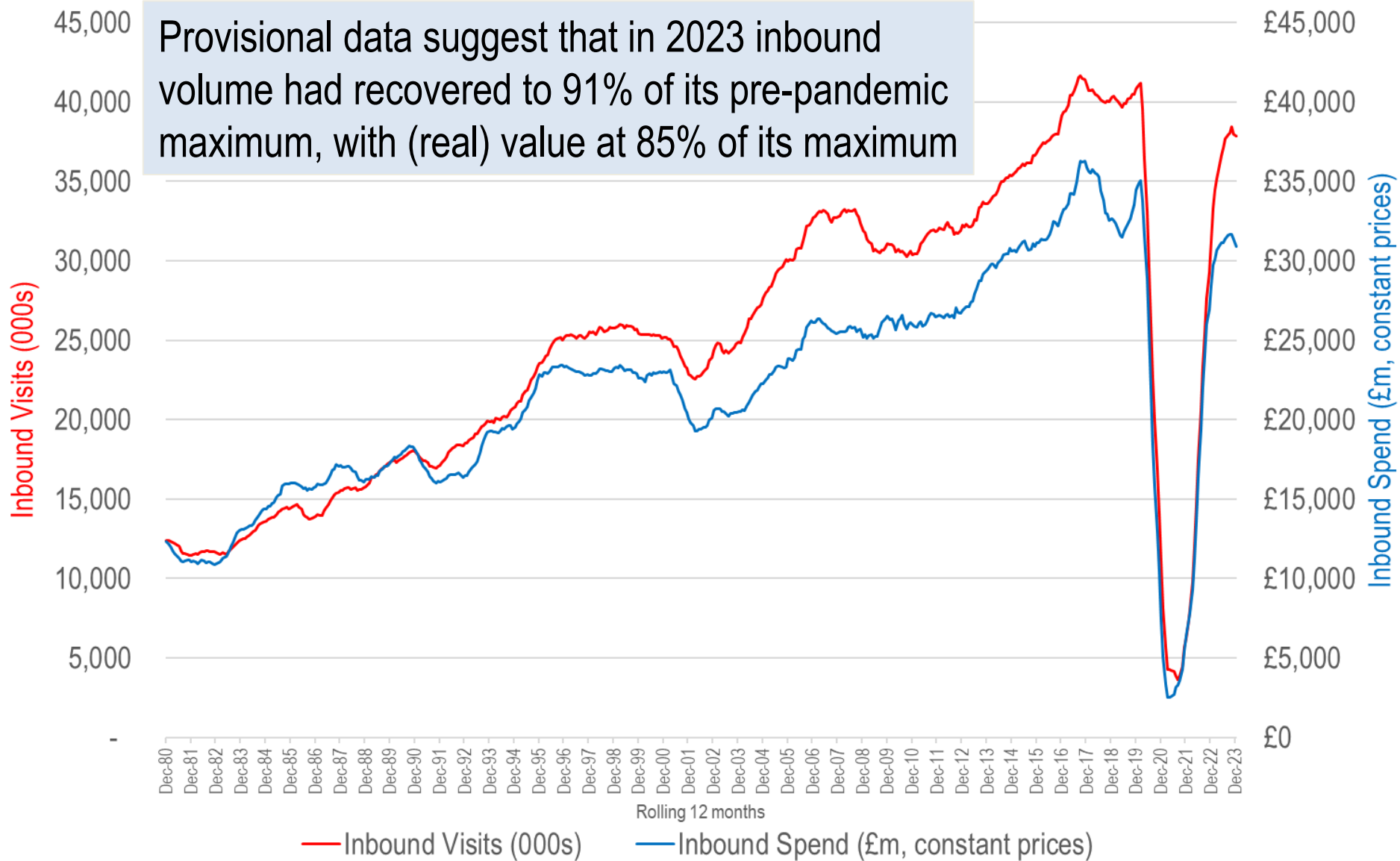
Hotel occupancy in Europe and the UK



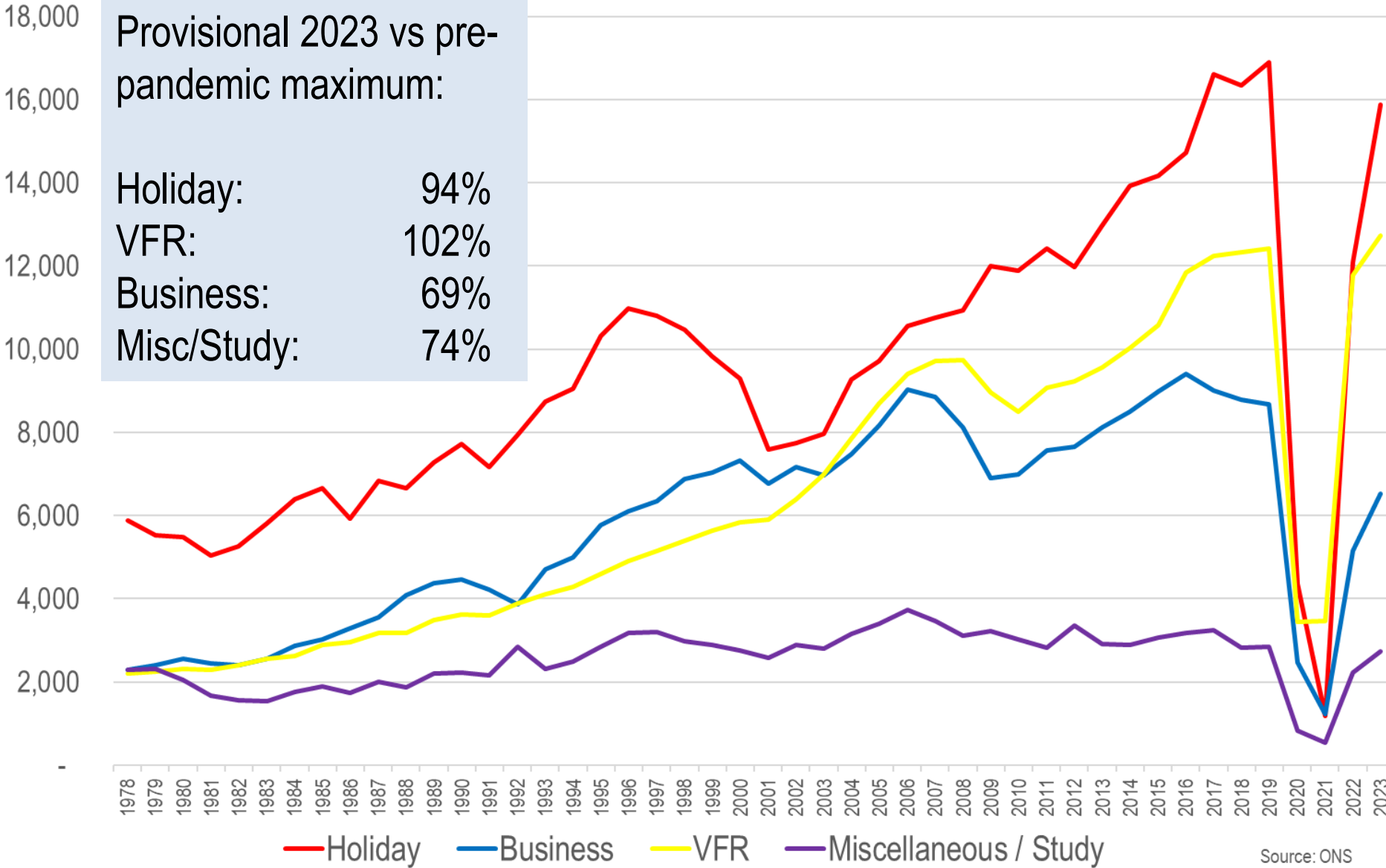
Source: UNWTO

UK inbound volume and value (at constant prices) since 1980

Provisional data suggest that in 2023 inbound volume had recovered to 91% of its pre-pandemic maximum, with (real) value at 85% of its maximum



UK inbound visits by journey purpose since 1978 (000s)



Source: ONS

UK's top 10 source markets for inbound Holiday visits

Full-year 2019

Volume

USA

France

Germany

Italy

Spain

Netherlands

Irish Republic

Belgium

China

Australia

Value

USA

Germany

China

France

Italy

Australia

Spain

Saudi Arabia

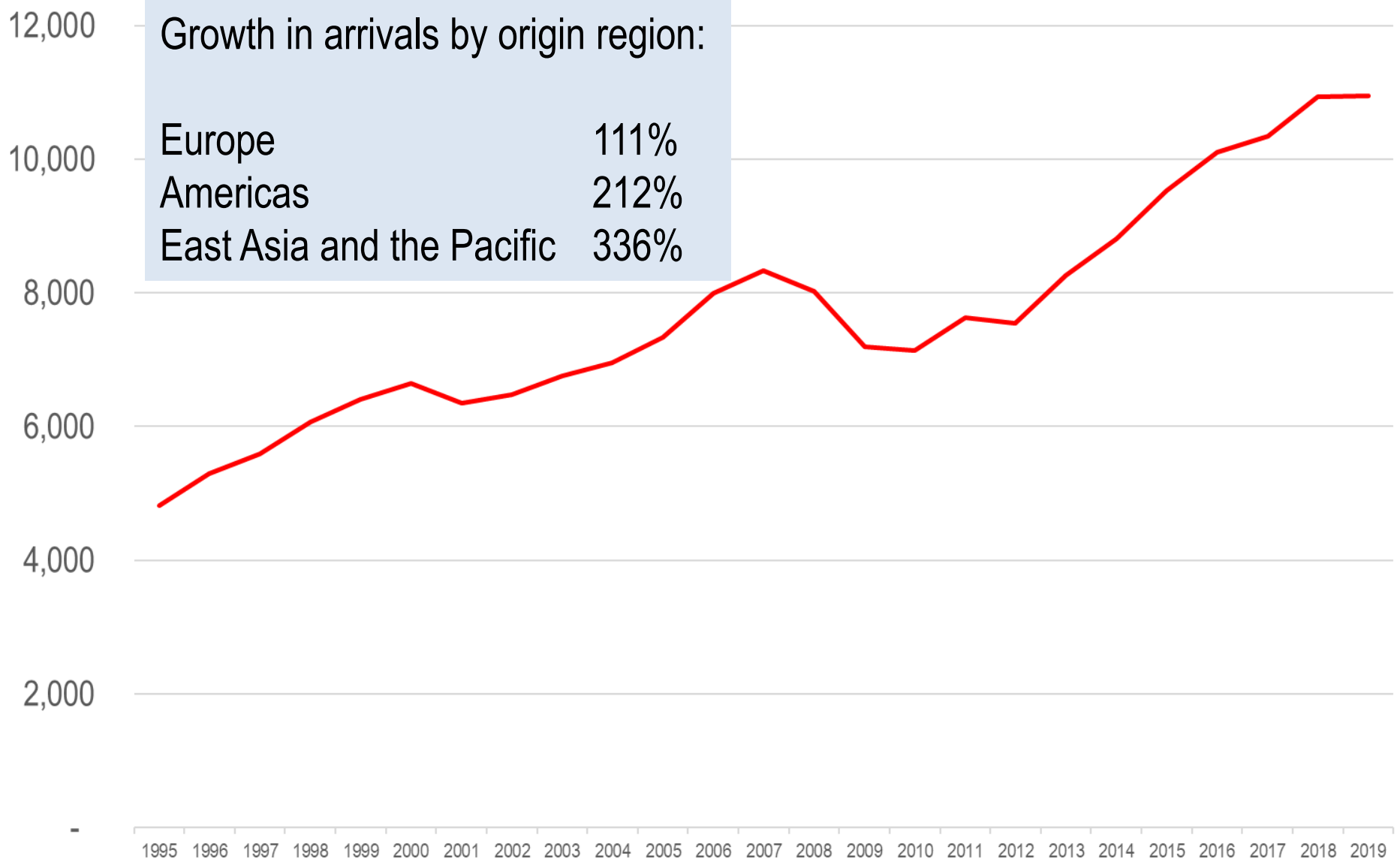
UAE

Netherlands

UK's top 10 source markets for inbound Holiday visits

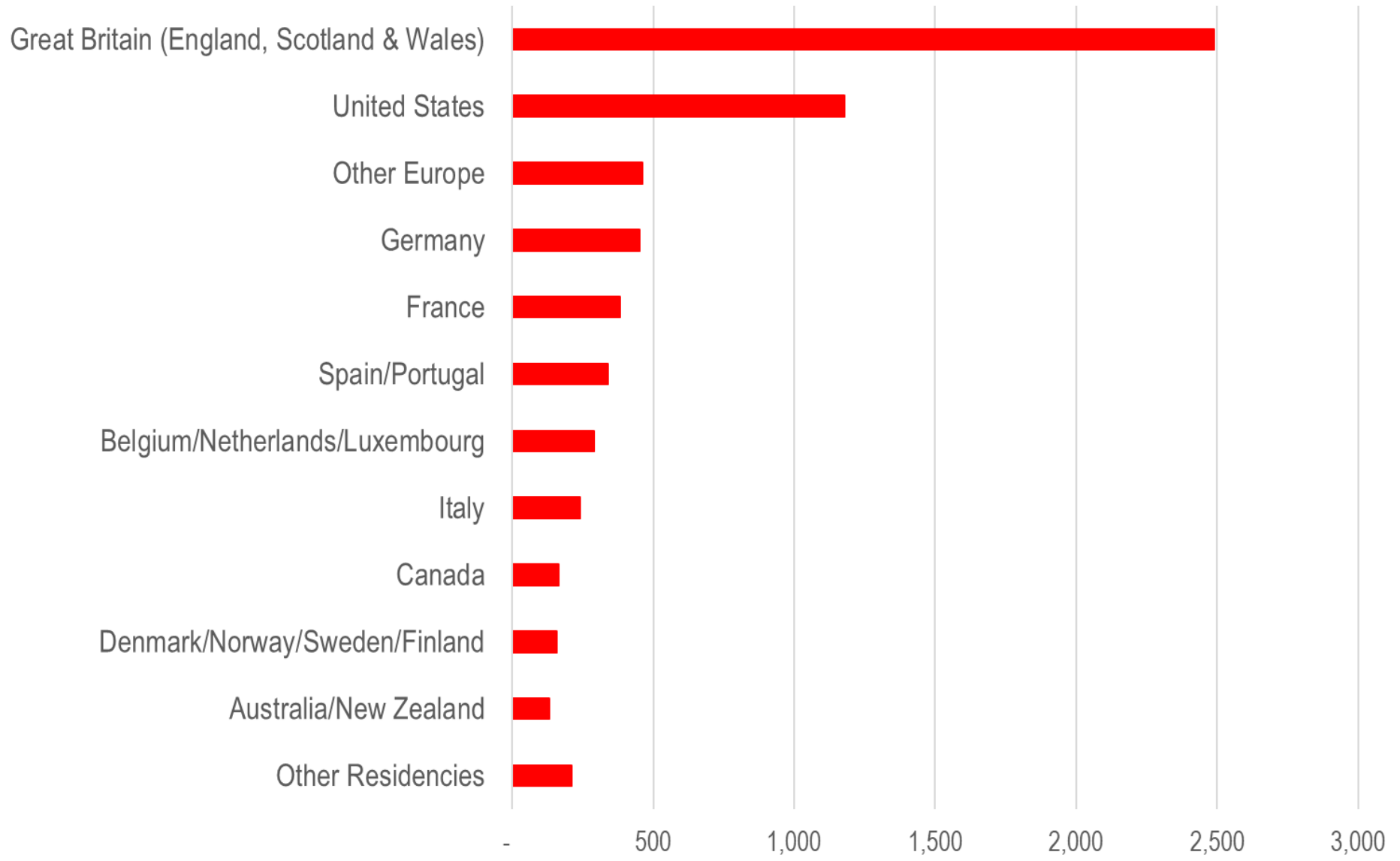
Full-year 2019		During first 9 months of 2023	
Volume	Value	Volume	Value
USA	USA	USA	USA
France	Germany	Germany	Germany
Germany	China	France	France
Italy	France	Irish Republic	Australia
Spain	Italy	Netherlands	Netherlands
Netherlands	Australia	Spain	Canada
Irish Republic	Spain	Italy	Italy
Belgium	Saudi Arabia	Australia	Spain
China	UAE	Canada	Saudi Arabia
Australia	Netherlands	Belgium	Irish Republic
		China 22nd	China 15th

Inbound visits to Ireland 1995-2019 (000s)



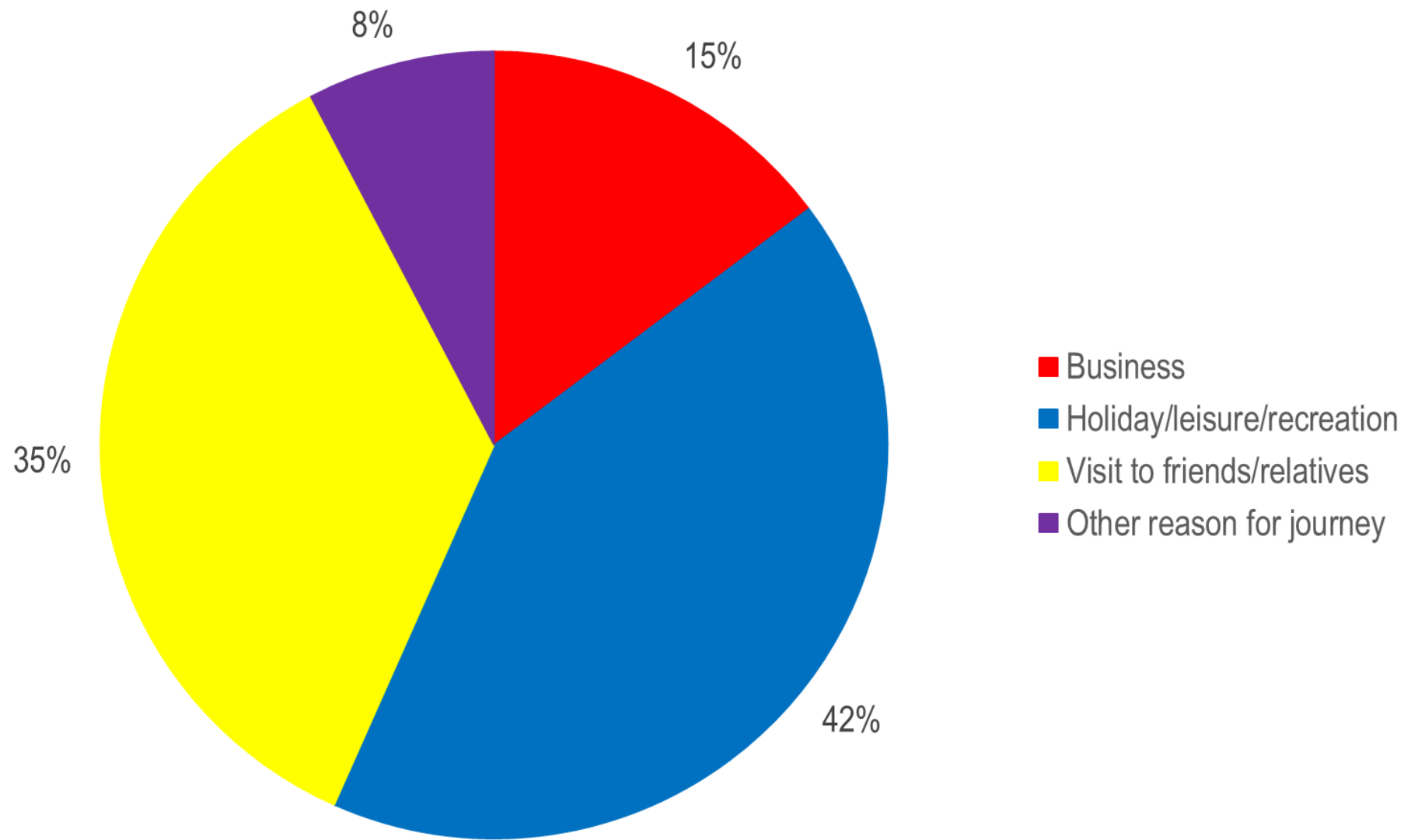
Source: UNWTO

Inbound visits to Ireland in the year to March 2024 (000s)



Source: CSO

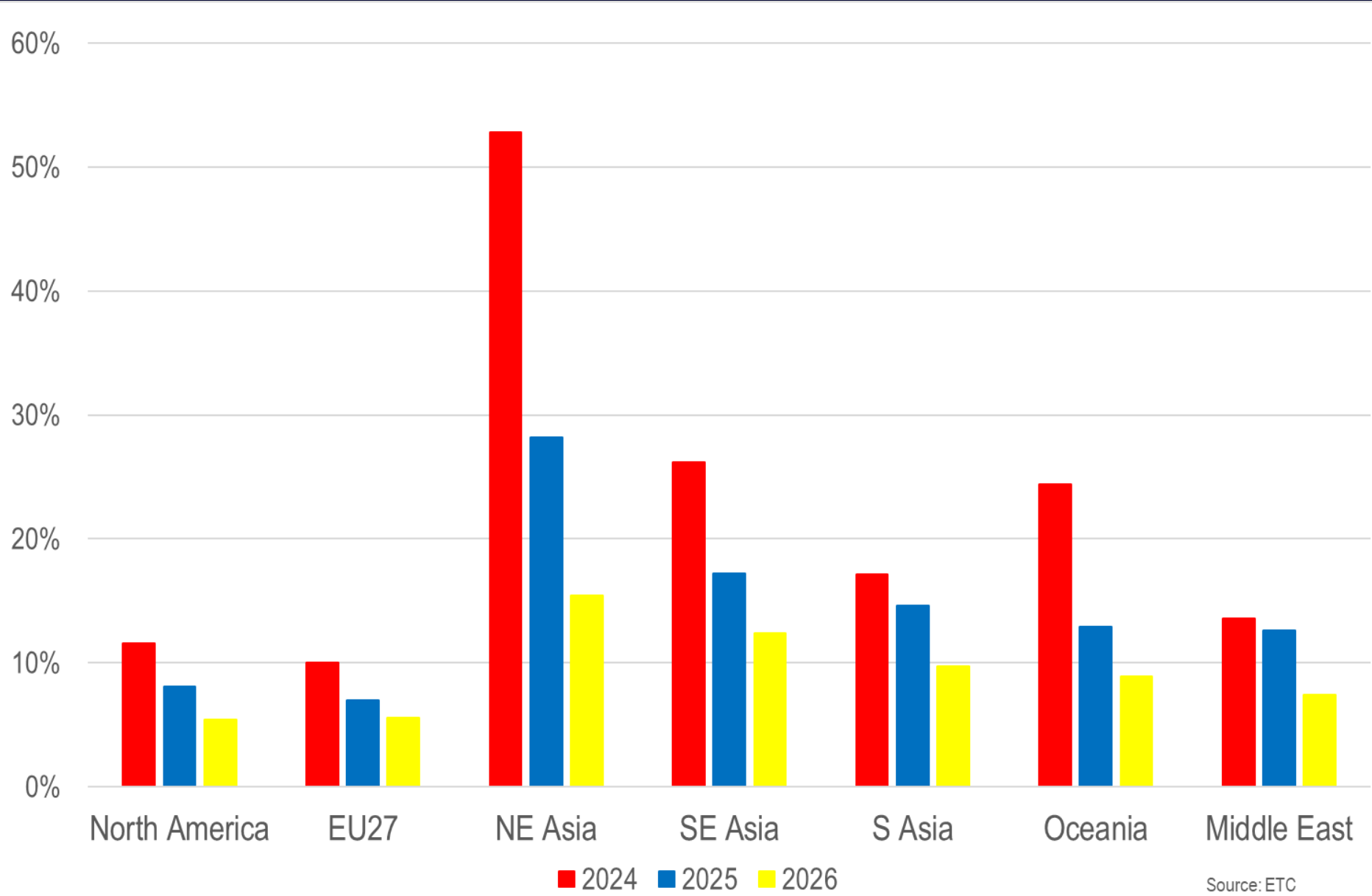
Inbound visits to Ireland in the year to March 2024



Aviation data

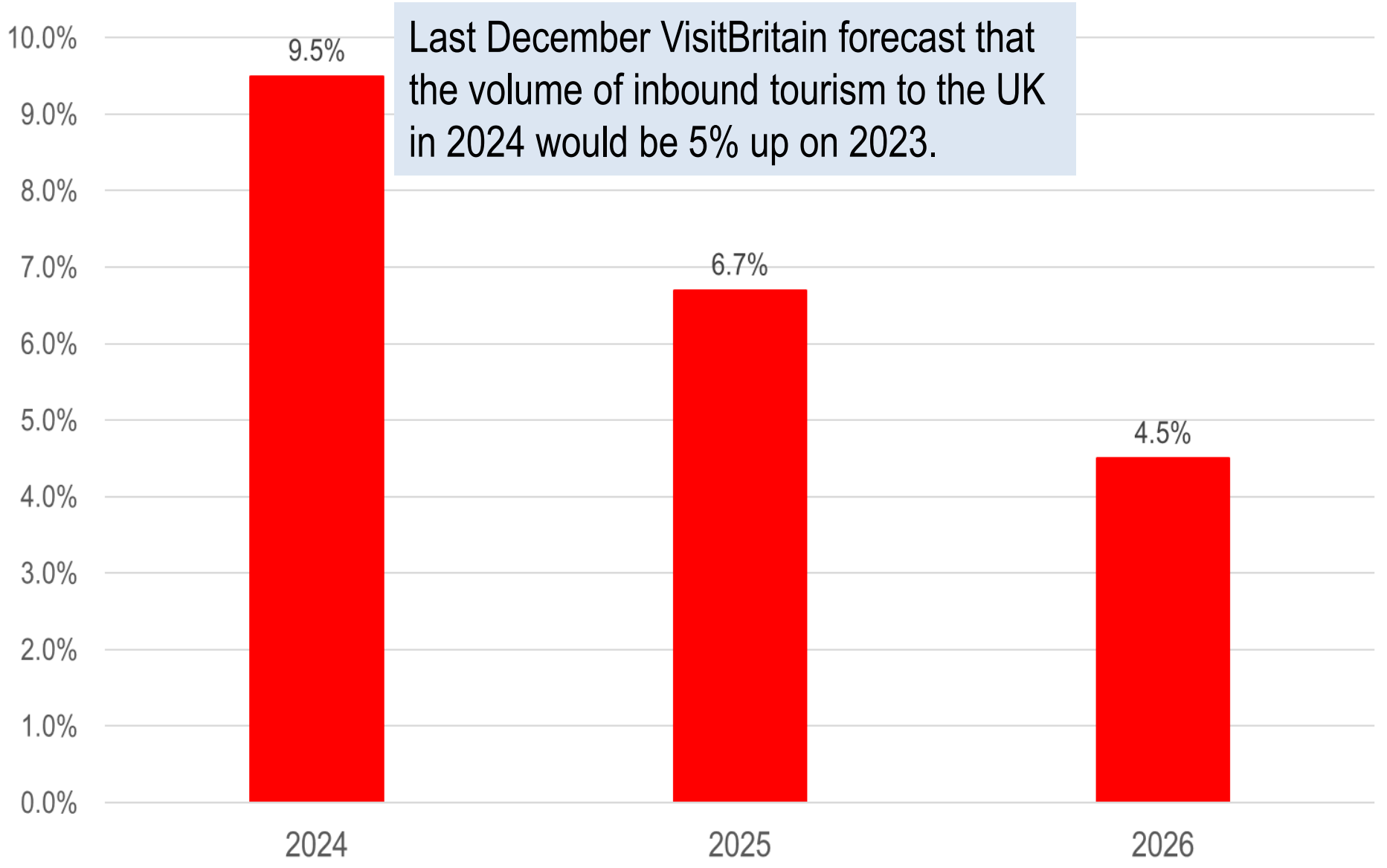
- EUROCONTROL data indicates that in the week of 22-28 April the average number of daily flights to/from the UK was 4% up on the equivalent week of 2023 but still 7% lower than for the same week of 2019
- Across Europe as a whole Trans-Atlantic flights were 15% up on 2019 in the most recent week, and Asia Pacific flight volumes 3% up
- The busiest long-haul flight pair for Europe in terms of average daily flights is UK-US, up 2% on 2019
- Ireland-US is the 7th busiest long-haul flight pair, with 6% more daily flights than five years ago

Global outbound annual tourism forecasts for world regions



Source: ETC

Inbound tourism annual growth forecast for Northern Europe

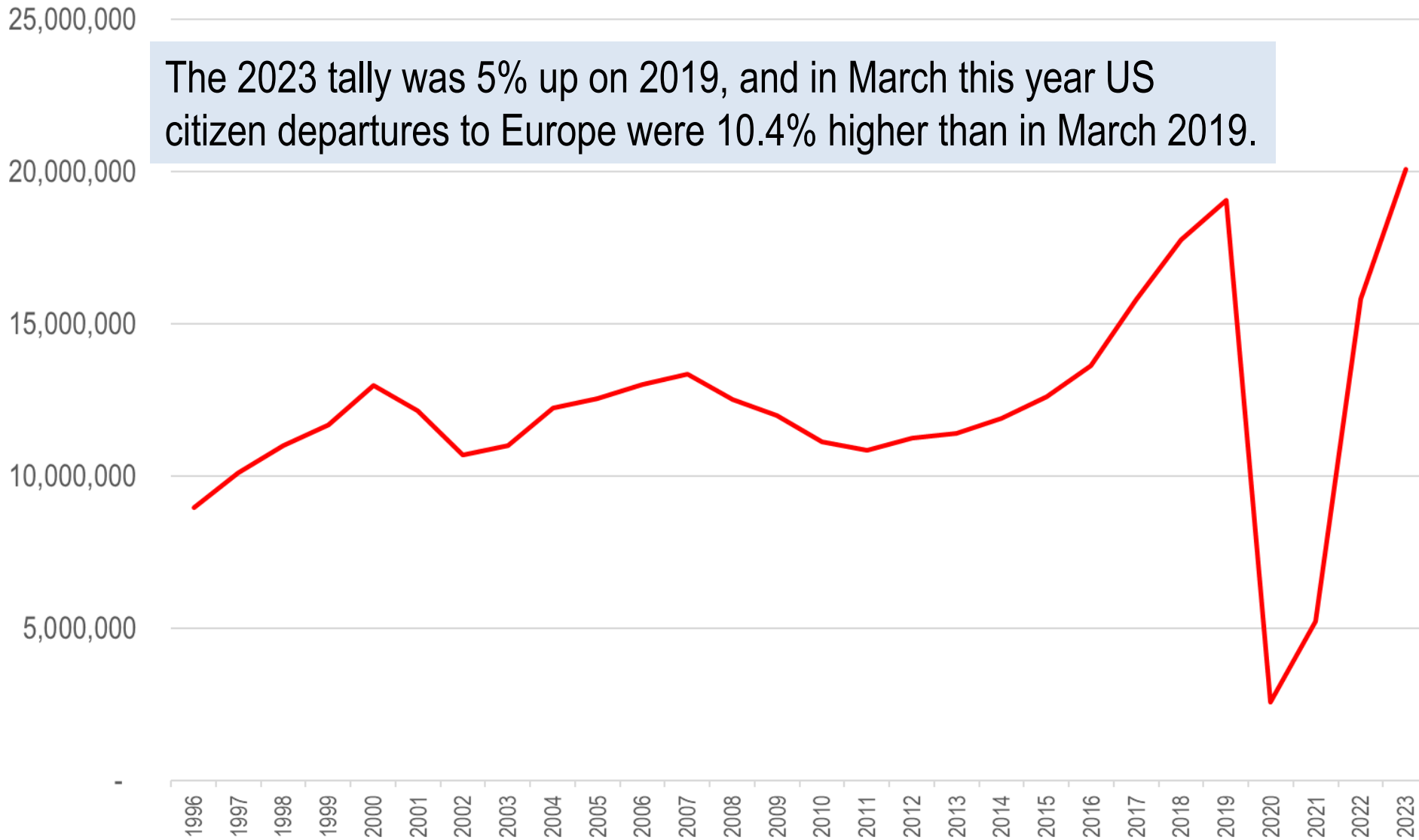


Last December VisitBritain forecast that the volume of inbound tourism to the UK in 2024 would be 5% up on 2023.

Source: ETC

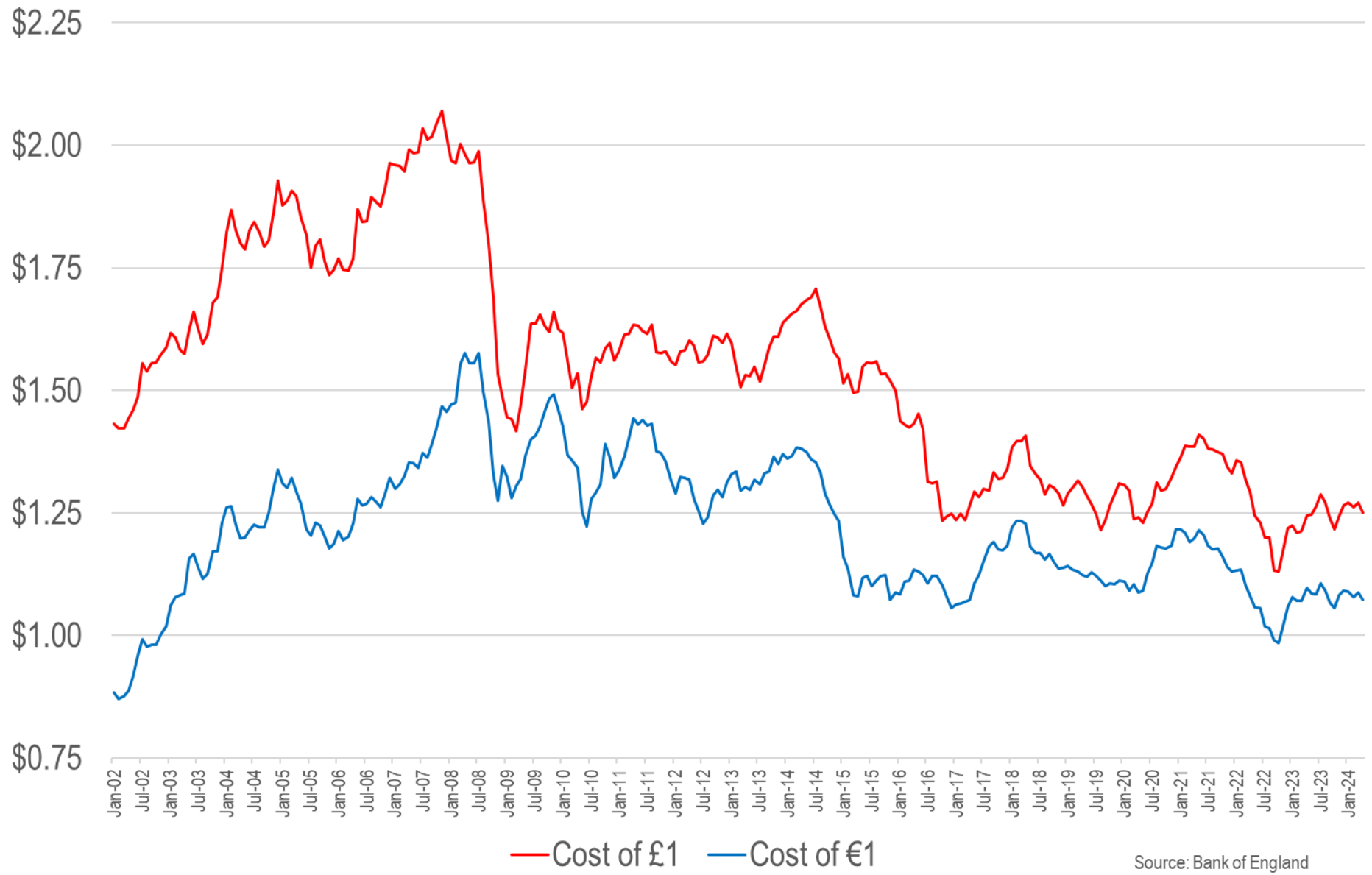
US citizen departures to Europe

The 2023 tally was 5% up on 2019, and in March this year US citizen departures to Europe were 10.4% higher than in March 2019.



Source: Department of Commerce

How much Americans need to pay to buy £1 or €1



Source: Bank of England

US market prospects

- Looking at data for visits from the USA to the UK between 1980 and 2019 the average annual growth in non presidential election years was 3.2%, only fractionally higher than the 3.1% in election years
- Aer Lingus is expanding its US network, re-establishing its route from Minneapolis-St Paul and introducing flights from Denver, meanwhile JetBlue is launching flights from JFK to Edinburgh
- ETC research suggests that among Americans planning travel to Europe in 2024 27% say their preferred destination is the UK and 10% mention Ireland (France 35%, Italy 34%)
- Tourism Economics forecast cumulative growth in visits from the USA to Northern Europe between 2023 and 2028 will be 13%