

**VisitBritain[®]****VisitEngland[™]**

2021 tourism forecast

The annual VisitBritain forecast for the volume and value of inbound tourism to the UK is issued in December each year. We are updating this page more regularly at the present time to reflect the impact of COVID-19 on inbound tourism to the UK, as well as an estimate of impact on domestic tourism. (Last updated for both inbound and domestic May 7th.)

Inbound forecast for the UK (last updated May 7th):

2020 forecast: Official inbound tourism statistics from the Office for National Statistics have only been published up to June 2020 at time of writing, and detailed statistics only up to March 2020. However, a number of other data sources are available which allow us to assess the state of inbound tourism to the UK.

VisitBritain's forecast for inbound tourism to the UK in 2020 is for a decline of 75% in visits to 10.2 million and a decline of 78% in spending to £6.2 billion. This would represent a loss vs the pre-COVID forecast of 31.8 million visits and £24.2 billion spending.

From mid-March to mid-July, COVID-19 triggered a near-total shutdown in international tourism to/from the UK with a few specific exceptions. Since then, available evidence suggests that there was an increase in visitor numbers from this low point, although they remained very low, and dipped again towards the end of the year.

2021 forecast: Our revised central scenario for inbound tourism in 2021 is for 11.3 million visits, up 10% on 2020 but only 28% of the 2019 level; and £6.2 billion to be spent by inbound tourists, up 1% on 2020 but only 22% of the 2019 level. This is a slight downgrade from the previous

forecast, run in January.

The forecast assumes the start of a recovery from May, albeit slow at first, with a step change in the summer followed by gradual recovery throughout the rest of the year as international travel opens up to and from a growing numbers of markets. Inbound tourism is still likely to remain well below normal levels throughout the rest of the year and by the end of 2021 we still do not expect inbound tourism to be back to, or even close to, normal levels.

In general, European inbound markets are forecast to recover quicker than long haul markets. However, there will be variations within each of Europe and long haul. Inbound tourism from some countries is still likely to be minimal even by the end of 2021. There are forecast to be 9.0 million visits from Europe in 2021, 33% of the 2019 level; and 2.2 million visits from long haul markets, 17% of the 2019 level. The value of visitor spending in 2021 is forecast to be £3.4 billion and £2.8 billion from European and long haul visitors respectively.

There are a number of assumptions behind, and significant risks to, this forecast. It reflects a balance between the resilient demand amongst many for international leisure travel as per [VisitBritain's sentiment research](#) and the likelihood of restrictions persisting for some time for many countries. The most crucial drivers will be the progression of vaccinations and of any new variants, both in the UK and in our key inbound markets. It is assumed that in the UK and most advanced markets, the majority of the adult population will be vaccinated in 2021 and that by the end of the year COVID-19 will be endemic and controlled rather than pandemic.

The market composition effect (Europe recovering faster than long haul) is likely to push down average spend per visit but it is assumed that the net effect of other factors (such as changes in average length of stay and average spend per night) is neutral. The forecast does not specifically model journey purpose but assumes that visits to friends and relatives are likely to recover faster than average; business trips (excluding those delivering goods) are likely to recover slower than average; and holiday visits are likely to recover at a rate in between.

A number of factors are likely to prevent inbound tourism quickly recovering to pre-COVID levels. Aside from vaccines and new variants, these include the economic situation in each market, with demand hit by unemployment and possible fiscal tightening; new behavioural habits affecting leisure and business travel, both short and long term; potential loss of supply.

Forecasting at this time is difficult, given the fast-moving situation and the unique circumstances. Events are moving fast during the COVID-19 pandemic and the outlook can change daily. We stress that this central scenario is merely one possible outcome and involves several assumptions and simplifications due to the fast-moving and uncertain situation. VisitBritain's central scenario forecasts therefore reflect a snapshot in time based on current understanding and a set of assumptions. Subsequent developments could change the outlook. We will revise this forecast a number of times during 2021.

Domestic forecast for Britain (last updated May 7th):

VisitBritain has also run a domestic tourism forecast. As with our inbound forecast, this represents a snapshot in time and makes a number of assumptions to provide an estimate of impact. Subsequent developments could change the outlook.

The forecast models each of the four journey purposes for overnight tourism (holidays, business, visiting friends and relatives and miscellaneous journeys), and 17 categories of spending for leisure day trips, separately.

2020: as there is no official domestic tourism data for 2020 yet, we have forecast estimates for domestic tourism spending in 2020. We have forecast £34.0 billion in domestic tourism spending in 2020, down 63% compared to 2019 when spending by domestic tourists in Britain was £91.6bn. This comprises £9.8bn from overnight tourism, down from £24.7bn in 2019, and £24.2bn from day trips, down from £67.0bn in 2019. In total, this represents a loss of £57.6bn (£14.9bn from overnights and £42.7bn from leisure day trips). The 2020 forecast is for a decline of 60% for overnights and 64% for leisure day trips, although with different patterns throughout the year and by journey purpose.

2021 forecast: our central scenario forecast is for a recovery to £51.4bn in domestic tourism spending in Britain in 2021; this is up 51% compared to 2020 but still only 56% of the level of spending seen in 2019. This is a downgrade from our previous forecast run at the end of 2020. We are forecasting £13.5bn in domestic overnight tourism spending (38% growth on 2020 but 55% of the 2019 level) and £38.6bn in leisure day trip spending (59% growth on 2020 and 58% of the 2019 level).

As with our inbound forecast, this is a short-term forecast that describes one possible outturn and involves many assumptions and simplifications due to the fast-moving and uncertain situation; it is therefore subject to revision. The forecast assumes a step change in mid-May as restrictions ease and confidence returns, followed by a gradual recovery throughout the rest of the year and beyond. We are likely to see different patterns of recovery for different purposes of overnight trips and for different categories of day trips. We do not expect an immediate return to pre-COVID levels of spending in any domestic tourism journey purpose or activity type, although we anticipate different recovery rates in different areas; some could see a strong summer while others remain below baseline levels for much longer.

For more insights on domestic tourism prospects please refer to our [consumer sentiment tracker](#).