

# USA Market Update

June 2025

#StarringGREATBritain

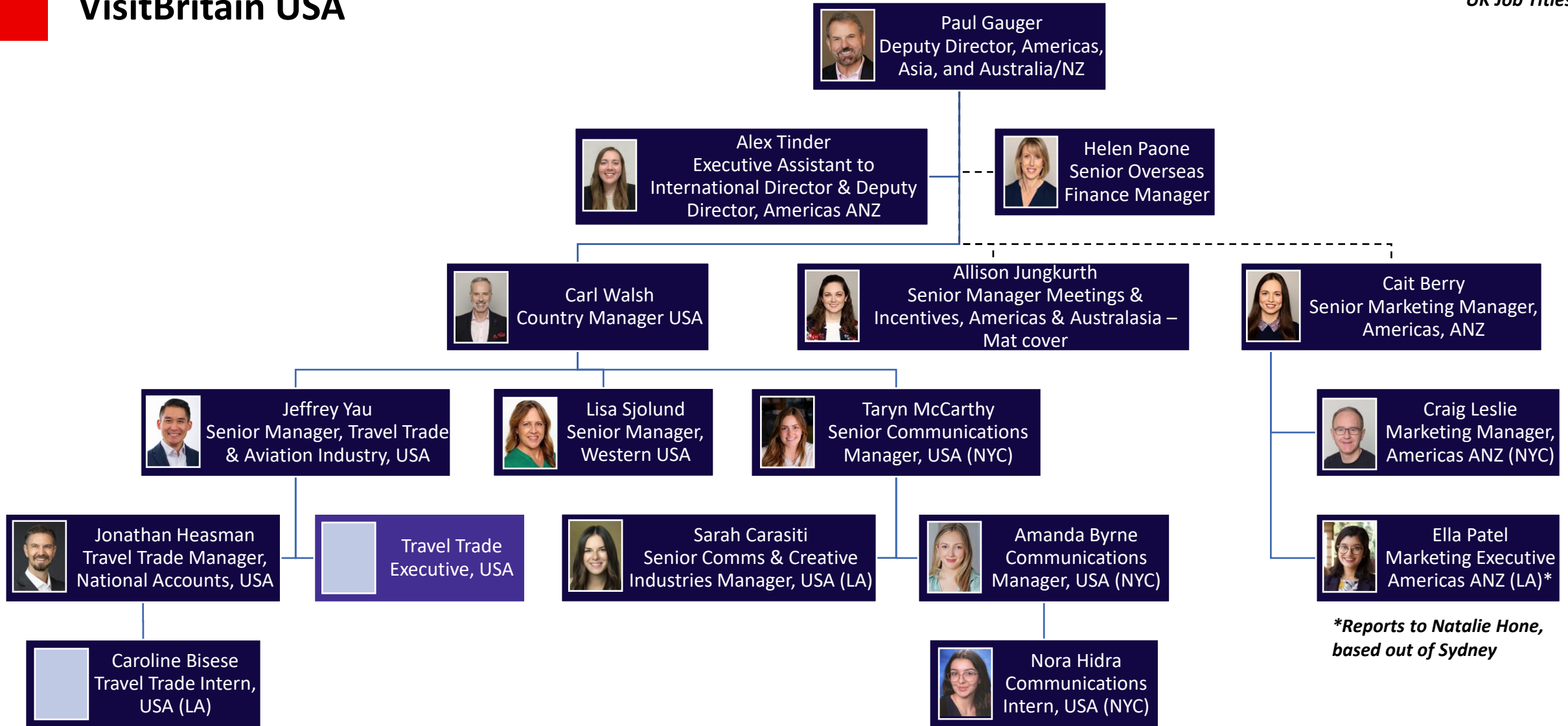
Bristol, England | Credit: Janet Carmichael / Alamy Stock Photo





# VisitBritain USA

UK Job Titles



*\*Reports to Natalie Hone,  
based out of Sydney*

## Key:

Blue FTE existing roles

Purple Vacant Role

# Where US visitors to the UK reside (2023)



## Top US source markets:

**#1 NY Tri-State area – 971,000 (19%)**

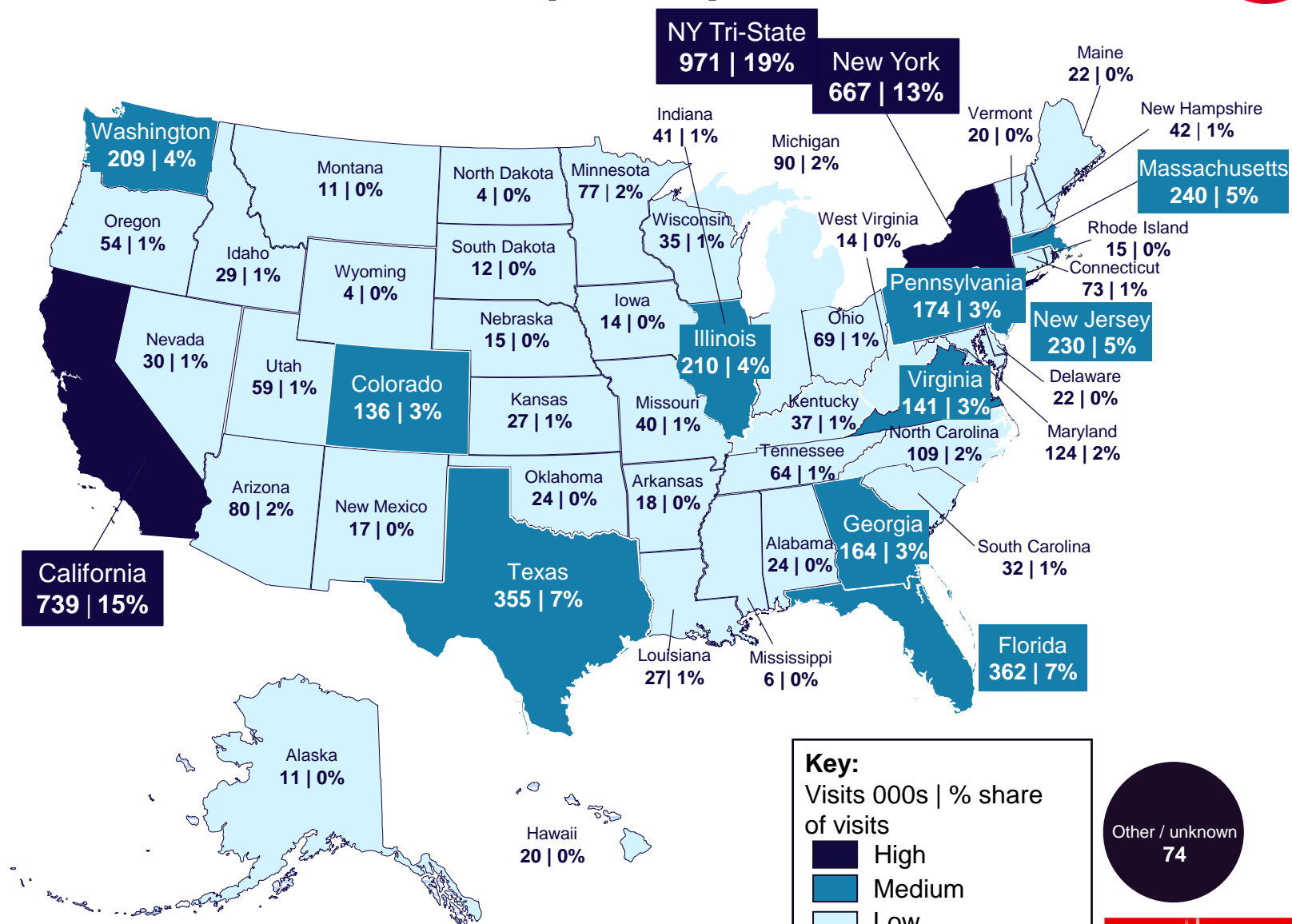
**#2 California - 739,000 (15%)**

**#3 New York (state) – 667,000 (13%)**

**#4 Florida - 362,000 (7%)**

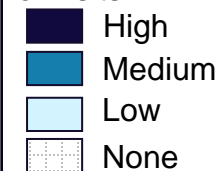
**#5 Texas - 355,000 (7%)**

- Almost 1 in 5 US visitors to the UK are residents of the New York Tri-State\* area
- California and the Tri-State area represent **34%** of all inbound visits from the US.



## Key:

Visits 000s | % share of visits

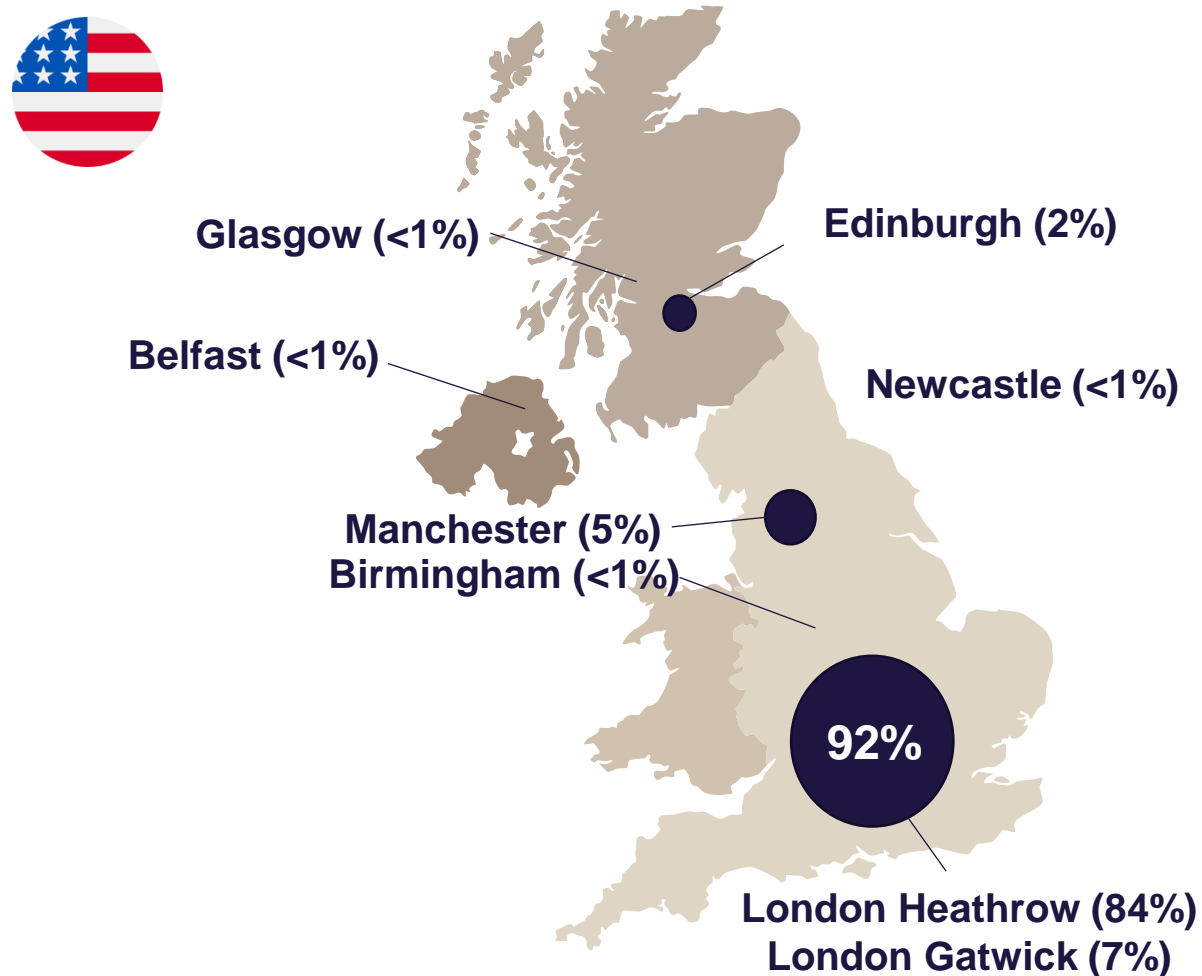


Other / unknown  
74



# Seat capacity on direct flights arriving in the UK (2024)

- The vast majority of seats on direct flights from the US are to London Heathrow.



# Seat capacity on direct flights from the US in 2024



## Top states by seat capacity on direct flights from US to UK (2024):

#1 NY Tri-State area – 3.25m (25%)

#2 California – 1.96m (15%)

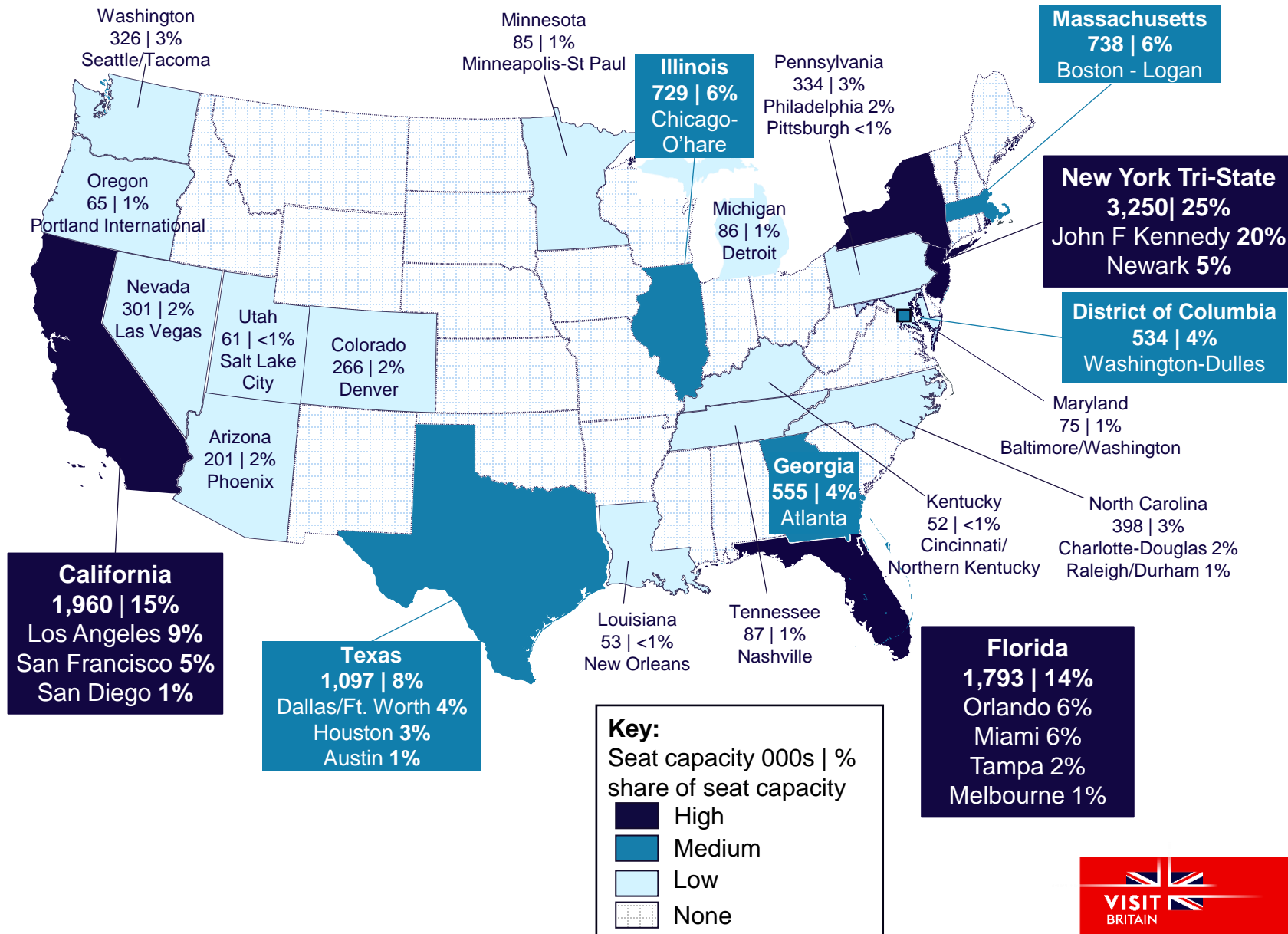
#3 Florida – 1,79m (14%)

#4 Texas – 1.1m (8%)

#5 Massachusetts – 738,000 (6%)

## Seat capacity by airline in 2024:

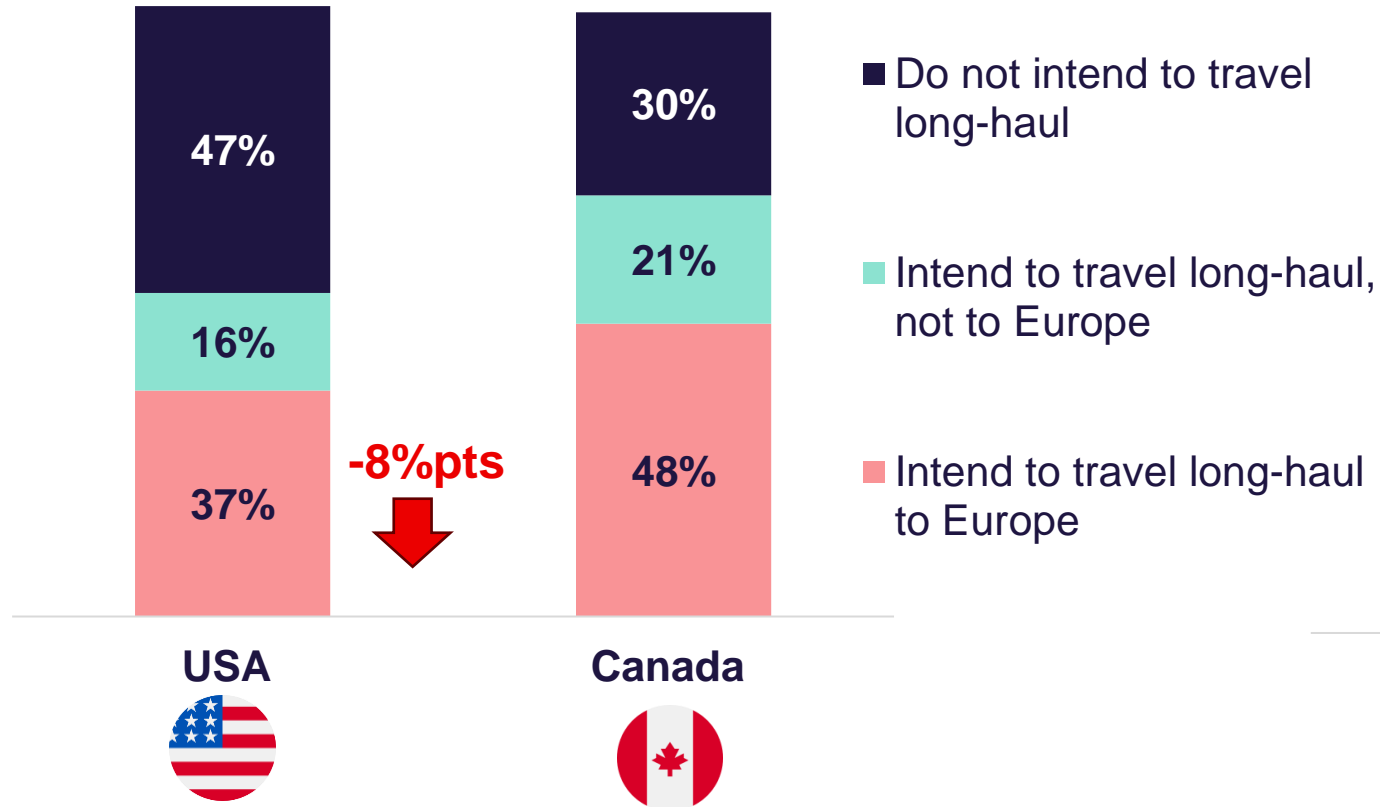
 <b>BRITISH AIRWAYS</b>	35%
 <b>virgin atlantic</b>	19%
 <b>American Airlines</b>	18%
 <b>UNITED</b>	13%



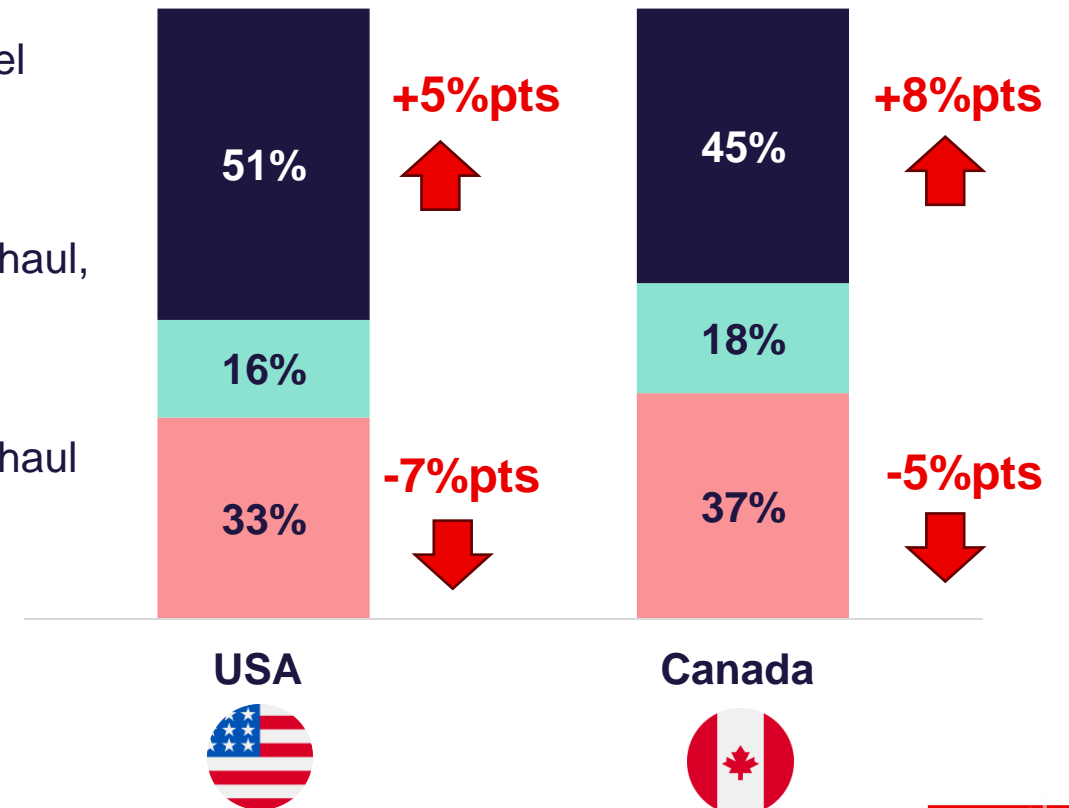
# Sentiment - long-haul travel intentions for 2025

- In December 2024, US intentions to travel long-haul to Europe in 2025 had declined significantly by 8% pts.
- Intentions to visit Europe over the summer have declined significantly, for both US and Canadian travellers.
- Travel sentiment is strongest among Americans from the Northeast (43% vs. 33% in the total sample).

## Travel Horizon: Jan – Dec 2025

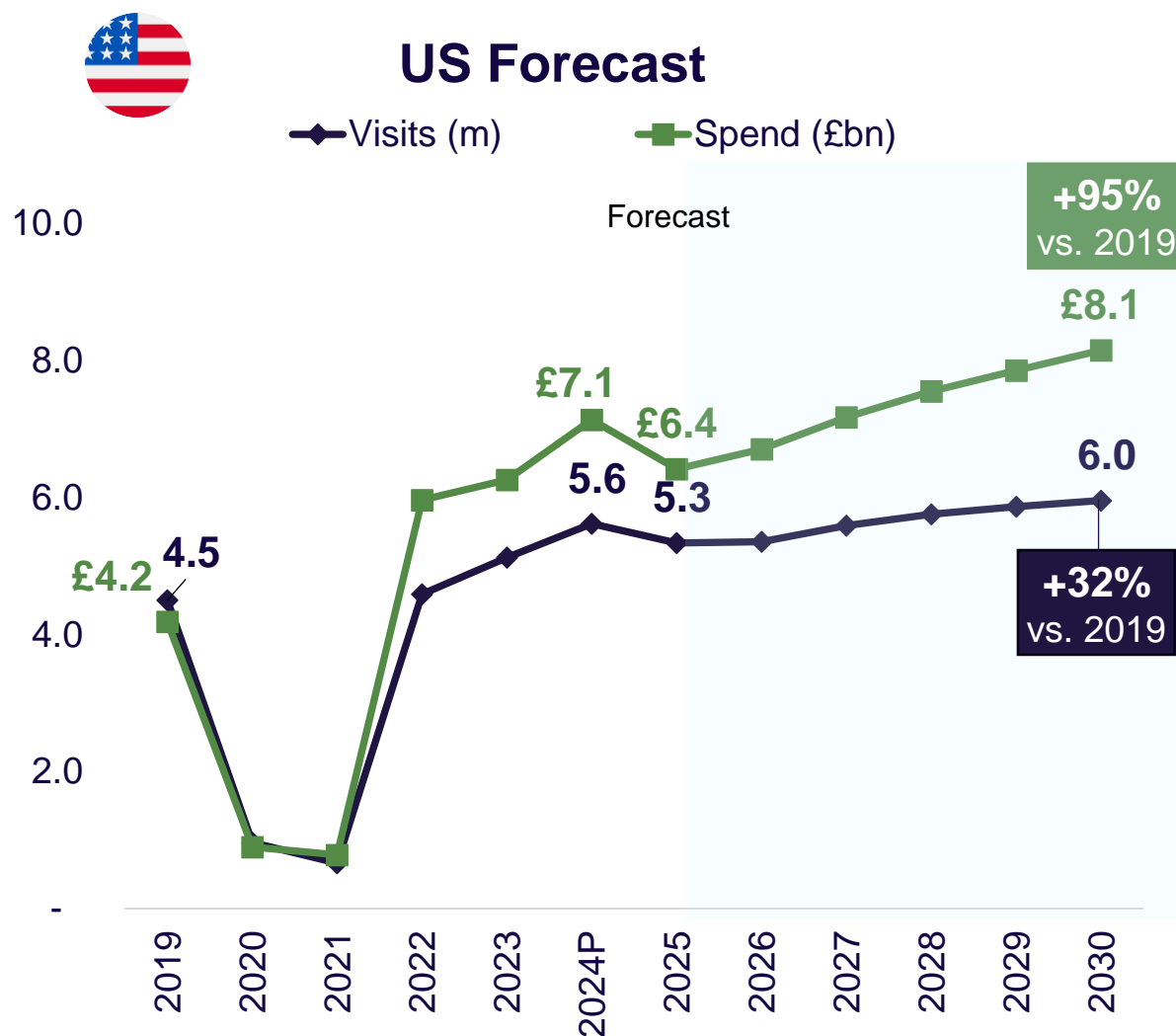


## Travel Horizon: May – Aug 2025



Sources: ETC Long-Haul Travel Barometer 1/2025, Travel horizons January-December 2025. Data collection 2-18 December 2024.  
ETC Long-Haul Travel Barometer 2/2025, Travel horizon May-August. Data collection 7-20 April 2025.

# Market Forecasts – visits and spend to the UK to 2030



Please note that these forecasts are frequently updated to take latest data and developments into account.

Source: International Passenger Survey by ONS, Forecast run May 2025 based on Oxford Economics/VisitBritain



# US Market Landscape

- **Cautious Optimism**
  - **Improved Consumer Sentiment:** Up 16% in June (first improvement in 6 months) but still 20% below Dec 2024 (last highest sentiment level)
  - Moderate inflation growth (too soon to tell the effects of tariff policy)
  - Strength of US dollar is still relatively high
- **Continued Headwinds**
  - Reduced spending at US retailers in May
  - Concerns over stagflation
  - Economic strain and political uncertainty remain



Helen Holton / Alamy Stock Photo

Hathersage, Derbyshire, England



# US Aviation Landscape

- Continued route growth (JetBlue & American Airlines routes to Scotland)
- The backlog of aircraft delivery, especially of widebodies (Boeing 787s & Airbus 350s), will continue to impact an airline's ability to launch new long-haul routes.

As more Airbus 321XLRs (long-range, single aisle aircraft) are delivered:

- Aircraft will allow airlines to launch new seasonal or year-round routes without being as financially exposed compared to using widebody aircraft.
- Can land at smaller, regional airports, providing more point-to-point access

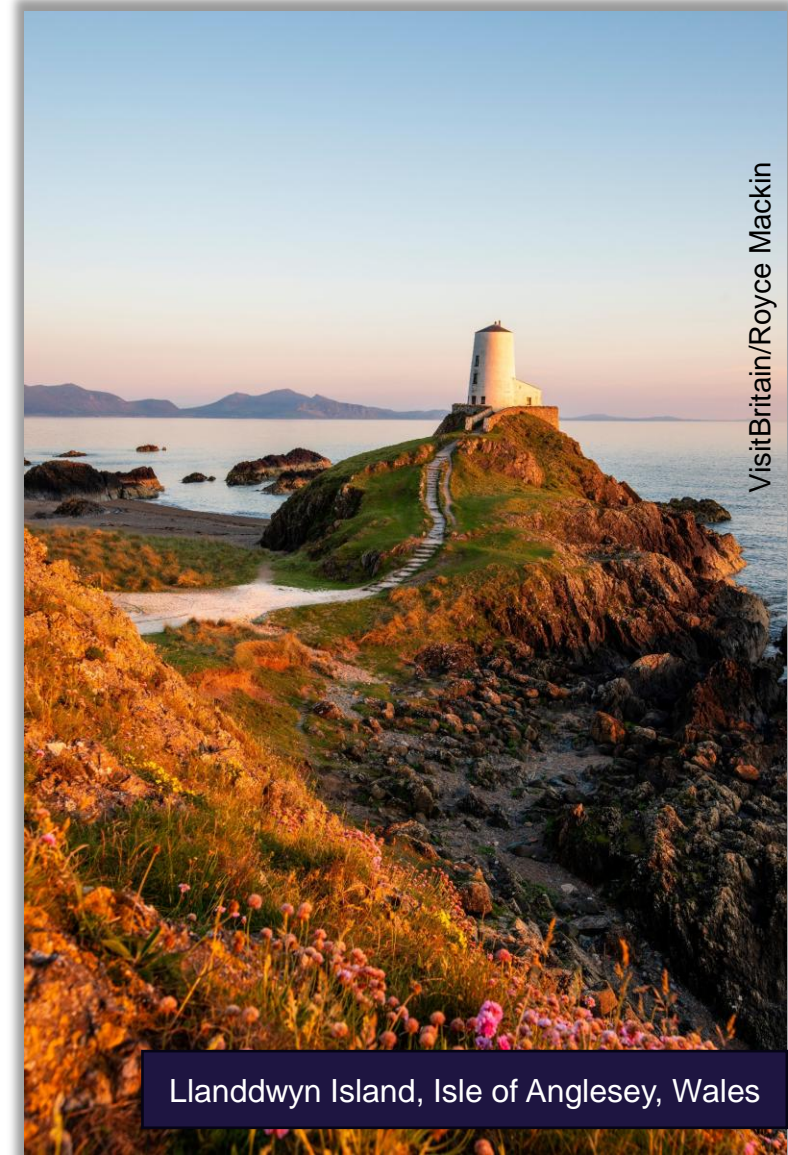


Flock of Wigeon | Blashford, Hampshire, England

Peter Atkinson / Alamy Stock Photo

# US Travel Trade Sentiment

- Bookings in 2025 overall have not slowed with some operators reporting that their 2026 bookings are on pace
- Shorter booking windows (booking closer to departure date vs typical planning of 6+ months out)
- Headwinds for rest of 2025 / 2026:
  - Economic uncertainty increasing costs
  - “Wait & See” approach
  - Perceptions – traveling abroad & returning to the US
  - Some groups deferring trips to 2027



# US Market Travel Trends

- **Prioritising Experiences:** Travelers are increasingly booking trips based on activities & experiences. (*Source: Arival*)
- **Bespoke Cultural Experiences:** American visitors prioritize authentic connections culture and immersive experiences opting for activities like pub crawls in historic towns, hands-on cooking classes with local chefs, or private tours of castles and stately homes.
- **Detour' Destinations:** A new trend gaining momentum. Travelers are still drawn to the classic, "tried-and-true" spots but are increasingly looking to complement their trips by exploring nearby, lesser-known destinations. (*Source: Expedia*)
- **Family Adventures (Multi-Gen Travel):** Whether the grandparents are paying, or the kids are leading on the planning, multi-gen travels is continuing to be popular. (*Source: Amex Global Travel*)
- **Phenomena Travel:** Similar to Noctourism, but a bit broader. Astro-tourism unlocked a whole new category of travel, which continues to become more and more popular amongst U.S. travelers, particularly in the luxury space (*Source: Travel Market Report*)



# Looking Ahead

## Strengths & Opportunities

- **1st rank for volume & value** of US visits to the UK (market resiliency)
- **Starring GREAT Britain:** Over 8 in 10 potential US visitors are keen to explore 'seen-on-screen' locations during trip to the UK
- **Experiences & Multi-Gen Travel**
- **Positive perceptions:** Positive relationship between US & UK (trade deal, tariff exemptions)



## Headwinds & Challenges

- **Current US Administration**
- **Tariff Policy**
- **Electronic Travel Authority (ETA)**
- **US market is large & split along political lines**
- **GB Value Proposition & Costs**
- **Seasonal Spread:** Shoulder season periods beginning to look like peak season



# Top USA Account Locations



# Market Events - '25/26

Flagship travel trade events include  
(connecting US buyers with UK suppliers):

- Destination Britain North America (DBNA)

## Event Participations & Activities:



- Delta Vacations University
- USTOA Annual Conference
- KAM exercise, regular sales calls/visits to build & foster relationships, develop new product, & recruit buyers for VisitBritain flagship & sponsored events
- Key Account Strategy for:
  - Outdoor adventure
  - Luxury
  - Golf



**DBNA 2023 in  
San Francisco**





# Market Opportunities - '25/26

## Planned B2B Marketing

- Internova / TLN Marketing Campaign
- Marketing Campaign with AAA Northeast
- Travel Weekly Social Influencer Campaign – *requires partner support to execute*

## BritAgent PRO (TravPRO)

- Britain training programme for travel advisors (1 year extension)

## Focus on Regenerative Travel

- Tourism Cares Meaningful Travel Map

## Greater Together Los Angeles

- 11-16 May, 2026
- Growth-focused movement in LA driving mutual prosperity for UK & US
- Planned VB Trade Activation

