

## Estimated additional spending and jobs – regional and national breakdown

AIR estimates that in 2024:

- the UK lost around £2 billion in spending as non-EU international visitors diverted their spending to France, Spain and Italy.
- In addition, EU visitors would have spent £3.65bn in the UK based on evidence of British visitors shopping tax-free in the EU, 50% of which would be spent outside London.<sup>1</sup>

This paper is AIR's estimate of the regional breakdown of this £5.65 additional spending if Britain offered tax-free shopping to all international visitors

- Regional share of additional £2bn of non-EU spend on shopping
- Regional share of additional £3.65bn of EU spend on shopping, accommodation, hospitality, travel, leisure
- Combined additional spending per region
- Combined additional jobs created per region, based on 1 job per £50,000 spend

Region/Nation	i) Additional non-EU spending (+£2bn)	ii) Additional EU spending (+£3.65bn)	iii) Combined additional spending	iv) Combined additional jobs
London	£1.6bn	£1.8bn	£3.4bn	68,000
South East (inc. Bicester Village)	£200m	£365m	£565m	11,320
West of England	£5m	£219m	£224m	4,460
East of England	£4m	£182m	£186m	3,720
East Midlands	£4m	£110m	£114m	2,280
West Midland	£12m	£146m	£158m	3,160
Manchester	£48m	£180m	£228m	4,560
Liverpool	£26m	£75m	£101m	2,020
North West (Man + Liv)	£74m	£255m	£329m	6,580
Yorkshire and the Humber	£3m	£80m	£83m	1,660
North East	£3m	£48m	£51m	1,020
Scotland	£92m	£365m	£457m	9,140
Wales	£3m	£80m	£83m	1,660
TOTAL	£2bn	£3.65bn	£5.65bn	113,000

**Non-EU additional spend per region** is based on 2019 tax-free shopping spending per region. HMRC estimated that in 2019, 80% of VAT RES refunds were on sales made in London; 10% on sales at Bicester Village; and 10% for the rest of the UK. Outside London, Edinburgh was the largest City for tax free sales (£92 million), followed by Manchester (£60 million), Liverpool and Ellesmere Port (£32 million), Glasgow (£23 million), Leeds (£18 million) and Birmingham (£14 million). Many other cities such as Cambridge, York, Cardiff, Bath, Southampton, Brighton, Sheffield and Newcastle also register tax-free sales of between £5-10 million.<sup>2</sup>

**EU additional spend per region** is based on the percentage spent in each region of the total EU spent in the UK in 2024, as reported by VisitBritain

<sup>1</sup> Both estimates are explained in detail in the AIR Briefing Document "How the Figures Add Up"

<sup>2</sup> Global Blue and Planet figures