

Great Britain Tourism Survey

April 2013 Update



Summary – April 2013 Update

ALL TOURISM

- GB overnight trip volumes fell by -16% compared to same period for April 2012. Declines were seen across all three destinations (England -14%, Scotland -13% and Wales -44%) in terms of the number of trips taken. April 2013 was a cold month, though mainly dry and sunny, with occasional snow flurries, but the Easter holiday fell at the end of March, meaning that trips were started and counted in March, while April 2012 benefitted from the Easter trips. Consequently there have been declines across most trip types.
- The length of trips also fell during April, with the number of nights spent away in Britain falling by a quarter compared to April 2012, while trip values fell by -15%. Again, this decline was felt across each of the destinations.
- 30.9m trips were taken in Great Britain during January-April 2013, which is the lowest volumes seen for this period in the past six years. The highest volumes were seen in January to April 2011, when 34.0m trips were taken and the current figure stands at -10% lower than this peak.

HOLIDAYS

- April Holiday trip volumes fell by -24% against 2012, and reflecting the declines seen in overall tourism figures, these declines were felt across all three destinations (England -22%, Scotland -17% and Wales -47%).
- The length and value of holiday trips in April also fell in comparison to 2012, seeing the number of overnight trips fall by -28% and the value of trips falling by -24%, generating £0.9bn compared to April 2012 when the value was £1.2bn.
- The 12.2m holiday trips taken during January to April 2013 marks the lowest volume figure seen since 2008, when there were 11.4m holiday trips for the period. January to April 2011 saw a peak in the number of holiday trips taken, at 13.9m trips.

VISITING FRIENDS & RELATIVES

- The number of trips taken in April for the purpose of visiting friends and relatives fell by -13% compared to 2012. The number of nights and expenditure on VFR trips were also impacted by the negative influences of the Easter holiday timing and unusually cold weather, falling by -23% and -7% respectively.
- VFR trip volumes have fallen to the lowest point seen over the six-year period of analysis, with 11.5m trips taken during January to April 2013. Compared to 2010, which saw a peak in the number of VFR trips in this period at 13.3m, this represents a fall of -15%.

BUSINESS TOURISM

- Business tourism was the only area to have seen any growth in April compared to 2012, having seen a +6% increase in trips taken.
- While more business trips were taken, they were shorter than those taken in April last year, due to a -9% fall in the number of trips taken. The value of trips remained relatively unchanged, having increased by +0.2%.
- The number of business trips taken during the period from January to February is 5.9m, which marks further progress in the recovery of business trip volumes since they fell from 6.0m in 2008 to 5.3m in 2009.

GB Domestic Tourism: Monthly Volume & Value 2013

ALL TOURISM

TRIPS	January			February			March			April			May			June		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB	6.294	5.702	-9.4%	6.711	7.418	+10.5%	8.793	8.408	-4.4%	11.154	9.348	-16.2%						
England	5.398	4.776	-11.5%	5.698	6.287	+10.3%	7.501	6.983	-6.9%	9.040	7.800	-13.7%						
BEDNIGHTS	January			February			March			April			May			June		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB	14.669	12.577	-14.3%	14.878	19.125	+28.5%	24.334	24.576	+1.0%	32.878	24.758	-24.7%						
England	12.287	10.491	-14.6%	12.448	15.465	+24.2%	20.275	19.081	-5.9%	25.786	20.185	-21.7%						
EXPENDITURE	January			February			March			April			May			June		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB	£1,017	£940	-7.6%	£1,117	£1,390	+24.4%	1524	1455	-4.5%	£2,092	£1,779	-15.0%						
England	£877	£766	-12.7%	£918	£1,157	+26.0%	1264	1198	-5.2%	£1,668	£1,464	-12.2%						

TRIPS	July			August			September			October			November			December			YTD – Jan-Apr		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			32.952	30.875	-6.3%
England																			27.637	25.846	-6.5%
BEDNIGHTS	July			August			September			October			November			December			YTD – Jan-Apr		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			86.759	81.036	-6.6%
England																			70.797	65.222	-7.9%
EXPENDITURE	July			August			September			October			November			December			YTD – Jan-Apr		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			£5,749	£5,565	-3.2%
England																			£4,727	£4,585	-3.0%

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Fieldwork: 10 Apr - 26 May
 TNS Face-to-Face Omnibus Survey
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GB Domestic Tourism: Monthly Volume & Value 2013

HOLIDAYS

TRIPS	January			February			March			April			May			June		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB	1.934	1.811	-6.4%	2.350	2.497	+6.3%	3.698	3.584	-3.1%	5.641	4.298	-23.8%						
England	1.532	1.433	-6.5%	1.886	2.020	+7.1%	3.023	2.778	-8.1%	4.437	3.453	-22.2%						

BEDNIGHTS	January			February			March			April			May			June		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB	4.779	3.904	-18.3%	5.394	5.843	+8.3%	10.619	12.009	+13.1%	17.903	12.954	-27.6%						
England	3.723	3.069	-17.6%	4.381	4.311	-1.6%	8.439	8.595	+1.8%	13.565	10.265	-24.3%						

EXPENDITURE	January			February			March			April			May			June		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB	£418	£348	-16.7%	£481	£489	+1.7%	748	766	+2.4%	£1,231	£941	-23.6%						
England	£345	£269	-22.0%	£372	£377	+1.3%	622	607	-2.4%	£980	£759	-22.6%						

TRIPS	July			August			September			October			November			December			YTD – Jan-Apr		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			13.623	12.190	-10.5%
England																			10.877	9.683	-11.0%

BEDNIGHTS	July			August			September			October			November			December			YTD – Jan-Apr		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			38.696	34.710	-10.3%
England																			30.109	26.241	-12.8%

EXPENDITURE	July			August			September			October			November			December			YTD – Jan-Apr		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			£2,878	£2,544	-11.6%
England																			£2,318	£2,012	-13.2%

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Fieldwork: 10 Apr - 26 May
 TNS Face-to-Face Omnibus Survey
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GB Domestic Tourism: Monthly Volume & Value 2013

VISITING FRIENDS & RELATIVES

	January			February			March			April			May			June		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
TRIPS																		
GB	2.666	2.284	-14.3%	2.732	3.028	+10.8%	3.188	3.183	-0.2%	3.483	3.024	-13.2%						
England	2.370	1.981	-16.4%	2.397	2.630	+9.7%	2.863	2.738	-4.4%	2.949	2.612	-11.4%						
BEDNIGHTS																		
GB	6.053	5.288	-12.6%	6.319	8.182	+29.5%	9.528	8.640	-9.3%	9.780	7.557	-22.7%						
England	5.178	4.695	-9.3%	5.323	6.813	+28.0%	8.390	7.123	-15.1%	7.887	6.363	-19.3%						
EXPENDITURE																		
GB	£243	£239	-1.6%	£268	£329	+22.8%	£336	£360	+7.1%	£382	£355	-7.1%						
England	£210	£199	-5.2%	£220	£286	+30.0%	£300	£305	+1.7%	£301	£295	-2.0%						

	July			August			September			October			November			December			YTD – Jan-Apr		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
TRIPS																					
GB																			12.069	11.518	-4.6%
England																			10.578	9.961	-5.8%
BEDNIGHTS																					
GB																			31.680	29.668	-6.4%
England																			26.778	24.994	-6.7%
EXPENDITURE																					
GB																			£1,229	£1,283	+4.4%
England																			£1,032	£1,084	+5.0%

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GB Domestic Tourism: Monthly Volume & Value 2013

BUSINESS TOURISM

TRIPS	January			February			March			April			May			June		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB	1.404	1.315	-6.3%	1.375	1.639	+19.2%	1.505	1.234	-18.0%	1.597	1.687	+5.6%						
England	1.247	1.126	-9.7%	1.181	1.388	+17.5%	1.291	1.092	-15.4%	1.284	1.441	+12.2%						

BEDNIGHTS	January			February			March			April			May			June		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB	3.293	2.831	-14.0%	2.680	4.220	+57.5%	3.268	2.861	-12.5%	3.902	3.570	-8.5%						
England	2.953	2.349	-20.5%	2.298	3.482	+51.5%	2.698	2.330	-13.6%	3.257	2.993	-8.1%						

EXPENDITURE	January			February			March			April			May			June		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB	£319	£308	-3.4%	£314	£519	+65.3%	£385	£261	-32.2%	£425	£426	+0.2%						
England	£290	£262	-9.7%	£276	£443	+60.5%	£300	£222	-26.0%	£342	£362	+5.8%						

TRIPS	July			August			September			October			November			December			YTD – Jan-Apr		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			5.882	5.874	-0.1%
England																			5.003	5.047	+0.9%

BEDNIGHTS	July			August			September			October			November			December			YTD – Jan-Apr		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			13.143	13.482	+2.6%
England																			11.206	11.153	-0.5%

EXPENDITURE	July			August			September			October			November			December			YTD – Jan-Apr		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			£1,442	£1,514	+5.0%
England																			£1,208	£1,289	+6.7%

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GB Domestic Tourism: Year to Date – 2008-2013

Trips, Bednights & Expenditure, Jan-Apr period

	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan – Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013
TRIPS																								
GB	31.892	31.655	32.448	34.026	32.952	30.875	11.353	13.036	12.557	13.943	13.623	12.190	13.243	12.390	13.274	13.231	12.069	11.518	5.984	5.335	5.646	5.618	5.882	5.874
England	26.708	26.842	26.912	28.369	27.637	25.846	9.156	10.471	9.877	11.105	10.877	9.683	11.367	11.001	11.530	11.491	10.578	9.961	5.130	4.588	4.685	4.828	5.003	5.047
	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan – Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
BEDNIGHTS																								
GB	92.031	89.952	86.951	92.974	86.759	81.036	35.705	41.593	37.917	41.545	38.696	34.710	37.032	33.413	34.121	34.441	31.68	29.668	14.079	12.581	11.861	12.394	13.143	13.482
England	75.413	74.053	68.764	75.999	70.797	65.222	27.550	32.777	29.395	32.108	30.109	26.241	31.722	28.718	28.144	29.351	26.778	24.994	12.061	10.602	9.387	10.551	11.206	11.153
	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan – Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
EXPENDITURE																								
GB	£5,320	£5,109	£5,019	£5,469	£5,749	£5,565	£2,356	£2,469	£2,394	£2,822	£2,878	£2,544	£1,334	£1,208	£1,196	£1,246	£1,229	£1,283	£1,465	£1,304	£1,261	£1,228	£1,442	£1,514
England	£4,341	£4,200	£4,051	£4,447	£4,727	£4,585	£1,872	£1,995	£1,911	£2,193	£2,318	£2,012	£1,086	£1,035	£991	£1,059	£1,032	£1,084	£1,250	£1,067	£1,023	£1,050	£1,208	£1,289

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GB Domestic Tourism: Year to Date – 2008-2013

Trip Characteristics, Jan-Apr period

	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan - Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
Av. Trip Length	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013
GB	2.89	2.84	2.68	2.73	2.63	2.62	3.14	3.19	3.02	2.98	2.84	2.85	2.80	2.70	2.57	2.60	2.62	2.58	2.35	2.36	2.10	2.21	2.23	2.30
England	2.82	2.76	2.56	2.68	2.56	2.52	3.01	3.13	2.98	2.89	2.77	2.71	2.79	2.61	2.44	2.55	2.53	2.51	2.35	2.31	2.00	2.19	2.24	2.21
	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan - Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
Av. £/Night	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013
GB	£58	£57	£58	£59	£66	£69	£66	£59	£63	£68	£74	£73	£36	£36	£35	£36	£39	£43	£104	£104	£106	£99	£110	£112
England	£58	£57	£59	£59	£67	£70	£68	£61	£65	£68	£77	£77	£34	£36	£35	£36	£39	£43	£104	£101	£109	£100	£108	£116
	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan - Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
Av. £/Trip	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013	2008	2009	2010	2011	2012	2013
GB	£167	£161	£155	£161	£174	£180	£208	£189	£191	£202	£211	£209	£101	£97	£90	£94	£102	£111	£245	£244	£223	£219	£245	£258
England	£163	£156	£151	£157	£171	£177	£204	£191	£193	£197	£213	£208	£96	£94	£86	£92	£98	£109	£244	£233	£218	£217	£241	£255

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