

Great Britain Tourism Survey

March 2013 Update



Summary – March 2013 Update

ALL TOURISM

- The number of overnight GB trips taken during March fell by -4% compared to the same month for the previous year. Despite positive increases for Scotland and Wales, which saw visitor numbers rise by +21% and +4% respectively, a decrease of -7% in English visits was the main driver of the GB level declines. The poor weather conditions experienced throughout March are likely to have contributed towards the declines, as March was the coldest on record since 1962 and heavy snow affected much of the UK, disrupting travel. Further complicating comparisons is the fact that Easter fell at the very end of March in 2013 – earlier than in 2012 when it was in April.
- There was little change to the length of trips across Britain overall, but the number of nights taken in England was -8% lower than seen in March 2012. Scotland and Wales on the other hand saw the number of bednights increase by +41% and +29% respectively. While the bednight volumes remained relatively unchanged overall, the level of spend has declined by -5% compared to March in 2012. England and Scotland both fed into this decline, but Wales saw more money spent on domestic overnight trips during March compared to 2012 (+17%).
- 21.5m trips were taken across Great Britain during January-March 2013, which is less than seen during the same period for the previous two years (21.8m in 2012, 22.1m in 2011) and slightly lower than the average volume of trips seen from 2008 to 2013 (21.8m)

HOLIDAYS

- The performance of volume of holiday trips taken in Britain largely follows that of the overall tourism figures, with a year-on-year decline of -3%, largely driven by a decline in English holiday trips of -8%. In contrast, Scotland and Wales actually saw an increase in holiday trips during March compared to 2012, with increases of +27% and +19% respectively.
- Although there were fewer holiday trips in March 2013, the trips were longer due to an increase in the number of bednights (+10%), driven to a large extent by gains for Scotland (+64%) and Wales (+50%). There was also a small increase in the value of holiday trips (+2%), which was again, driven again by Scotland (+17%) and Wales (+39%).
- There were 7.9m holiday trips during March 2013, and while this was a decrease compared to March 2012 (8.0m visits), it is still higher than the average volume of visits seen since 2008 (7.7m).

VISITING FRIENDS & RELATIVES

- Around 3.2m visits for the purposes of visiting friends and relatives were taken during March 2013, comparable to the levels seen during March for the previous year (a decrease of -0.2%). VFR trips taken in England and Wales fell in number (by -4% and -30% respectively), but an increase for Scotland (+80%) acted to offset the negative effect.
- VFR trips were shorter, however, with -9% fewer bednights taken during March compared to 2012. This decline was driven by decreases for both England (-15%) and Wales (-20%), though Scotland saw a +60% increase in bednights for VFR trips. Although VFR trips were fewer and shorter, they generated more spend, with a +7% increase in value compared to March 2012. A +2% increase in money spent on English VFR trips accounted for much of the increase but a +100% uplift on spending during Scottish trips also contributed to the increase.

BUSINESS TOURISM

- There were 1.2m British domestic business trips taken during March this year, marking an -18% decrease compared to March 2012. There were declines across all GB nations. The volume of bednights during these trips has also fallen year-on-year, with a decrease of -12.5%, as has the overall value of business trips taken, which has fallen by nearly a third (-32%) to £261m. The volume of business trips taken during January to March has been fairly consistent over the past four years and has shown no sign of recovering to levels seen in 2008.

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	8.402	-4.4%									
England	5.398	4.776	-11.5%	5.698	6.287	+10.3%	7.501	6.977	-7.0%									
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	24.221	-0.5%									
England	12.287	10.491	-14.6%	12.448	15.465	+24.2%	20.275	18.726	-7.6%									
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%	£1,524	£1,451	-4.8%									
England	£877	£766	-12.7%	£918	£1,157	+26.0%	£1,264	£1,194	-5.5%									

TRIPS	July			August			September			October			November			December			YTD – Jan-Mar		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			21.798	21.522	-1.3%
England																			18.597	18.040	-3.0%
BEDNIGHTS	July			August			September			October			November			December			YTD – Jan-Mar		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			53.881	55.923	+3.8%
England																			45.011	44.682	-0.7%
EXPENDITURE	July			August			September			October			November			December			YTD – Jan-Mar		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			£3,657	£3,781	+3.4%
England																			£3,059	£3,116	+1.9%

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Fieldwork: 13 Mar – 28 Apr
 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	3.578	-3.2%									
England	1.532	1.433	-6.5%	1.886	2.020	+7.1%	3.023	2.772	-8.3%									

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	11.654	+9.7%									
England	3.723	3.069	-17.6%	4.381	4.311	-1.6%	8.439	8.240	-2.4%									

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	£761	+1.7%									
England	£345	£269	-22.0%	£372	£377	+1.3%	£622	£602	-3.2%									

TRIPS	July			August			September			October			November			December			YTD – Jan-Mar		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			7.981	7.886	-1.2%
England																			6.441	6.224	-3.4%

BEDNIGHTS	July			August			September			October			November			December			YTD – Jan-Mar		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			20.793	21.401	+2.9%
England																			16.544	15.621	-5.6%

EXPENDITURE	July			August			September			October			November			December			YTD – Jan-Mar		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			£1,647	£1,598	-3.0%
England																			£1,339	£1,248	-6.8%

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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%									
England	2.370	1.981	-16.4%	2.397	2.630	+9.7%	2.863	2.738	-4.4%									
BEDNIGHTS																		
GB	6.053	5.288	-12.6%	6.319	8.182	+29.5%	9.528	8.640	-9.3%									
England	5.178	4.695	-9.3%	5.323	6.813	+28.0%	8.390	7.123	-15.1%									
EXPENDITURE																		
GB	£243	£239	-1.6%	£268	£329	+22.8%	£336	£360	+7.1%									
England	£210	£199	-5.2%	£220	£286	+30.0%	£300	£305	+1.7%									

	July			August			September			October			November			December			YTD – Jan-Mar		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
TRIPS																					
GB																			8.586	8.495	-1.1%
England																			7.629	7.349	-3.7%
BEDNIGHTS																					
GB																			21.900	22.110	+1.0%
England																			18.891	18.631	-1.4%
EXPENDITURE																					
GB																			£846	£929	+9.8%
England																			£731	£789	+7.9%

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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%									
England	1.247	1.126	-9.7%	1.181	1.388	+17.5%	1.291	1.092	-15.4%									

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%									
England	2.953	2.349	-20.5%	2.298	3.482	+51.5%	2.698	2.330	-13.6%									

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%									
England	£290	£262	-9.7%	£276	£443	+60.5%	£300	£222	-26.0%									

TRIPS	July			August			September			October			November			December			YTD - Jan-Mar		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			4.285	4.188	-2.3%
England																			3.719	3.606	-3.0%

BEDNIGHTS	July			August			September			October			November			December			YTD - Jan-Mar		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			9.241	9.912	+7.3%
England																			7.949	8.161	+2.7%

EXPENDITURE	July			August			September			October			November			December			YTD - Jan-Mar		
	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch	2012	2013	%ch
GB																			£1,018	£1,088	+6.9%
England																			£866	£927	+7.0%

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GB Domestic Tourism: Year to Date – 2008-2013

Trips, Bednights & Expenditure, Jan-Mar period

	ALL TOURISM, Jan - Mar period						HOLIDAYS – Jan - Mar period						VFR – Jan - Mar period						BUSINESS – Jan - Mar 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	23.585	20.454	21.11	22.064	21.798	21.522	7.935	7.323	7.301	7.745	7.981	7.886	10.104	8.527	8.829	9.293	8.586	8.495	4.466	3.971	4.233	4.201	4.285	4.188
England	19.748	17.47	17.719	18.453	18.597	18.04	6.408	5.946	5.792	6.203	6.441	6.224	8.644	7.612	7.786	8.105	7.629	7.349	3.82	3.368	3.498	3.57	3.719	3.606
	ALL TOURISM, Jan - Mar period						HOLIDAYS – Jan - Mar period						VFR – Jan - Mar period						BUSINESS – Jan - Mar period					
BEDNIGHTS	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	64.957	53.588	53.948	55.55	53.881	55.923	23.051	21.301	19.867	20.312	20.793	21.401	27.81	21.333	22.602	22.638	21.90	22.11	9.719	9.229	9.017	8.801	9.241	9.912
England	53.774	44.796	43.097	45.948	45.011	44.682	18.376	16.999	15.707	15.645	16.544	15.621	23.849	18.829	18.89	19.581	18.891	18.631	8.206	7.619	7.167	7.412	7.949	8.161
	ALL TOURISM, Jan - Mar period						HOLIDAYS – Jan - Mar period						VFR – Jan - Mar period						BUSINESS – Jan - Mar period					
EXPENDITURE	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	£3,756	£3,239	£3,253	£3,426	£3,657	£3,781	£1,607	£1,373	£1,383	£1,514	£1,647	£1,598	£963	£800	£788	£869	£846	£929	£1,060	£973	£945	£925	£1,018	£1,088
England	£3,063	£2,653	£2,617	£2,802	£3,059	£3,116	£1,289	£1,108	£1,083	£1,176	£1,339	£1,248	£775	£703	£657	£744	£731	£789	£897	£771	£776	£784	£866	£927

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GB Domestic Tourism: Year to Date – 2008-2013

Trip Characteristics, Jan-Mar period

	ALL TOURISM, Jan - Mar period						HOLIDAYS – Jan - Mar period						VFR – Jan - Mar period						BUSINESS – Jan - Mar 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	2.75	2.62	2.56	2.52	2.47	2.60	2.90	2.91	2.72	2.62	2.61	2.71	2.75	2.50	2.56	2.44	2.55	2.60	2.18	2.32	2.13	2.09	2.16	2.37
England	2.72	2.56	2.43	2.49	2.42	2.48	2.87	2.86	2.71	2.52	2.57	2.51	2.76	2.47	2.43	2.42	2.48	2.54	2.15	2.26	2.05	2.08	2.14	2.26
	ALL TOURISM, Jan - Mar period						HOLIDAYS – Jan - Mar period						VFR – Jan - Mar period						BUSINESS – Jan - Mar 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	£60	£60	£62	£68	£68	£70	£64	£70	£75	£79	£75	£35	£38	£35	£38	£39	£42	£109	£105	£105	£105	£110	£110
England	£57	£59	£61	£61	£68	£70	£70	£65	£69	£75	£81	£80	£32	£37	£35	£38	£39	£42	£109	£101	£108	£106	£109	£114
	ALL TOURISM, Jan - Mar period						HOLIDAYS – Jan - Mar period						VFR – Jan - Mar period						BUSINESS – Jan - Mar 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	£159	£158	£154	£155	£168	£176	£203	£187	£189	£195	£206	£203	£95	£94	£89	£94	£99	£109	£237	£245	£223	£220	£238	£260
England	£155	£152	£148	£152	£164	£173	£201	£186	£187	£190	£208	£201	£90	£92	£84	£92	£96	£107	£235	£229	£222	£220	£233	£257

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