

Headline 2013 International Passenger Survey data

The Office for National Statistics have released full year 2013 International Passenger Survey.

Spend up 12.7% on 2012 to £21.012 billion, a record in nominal terms.

Average spend per visit £640, an increase from £600 in 2012 (£664 for holiday visits).

Average spend per night £86, up from £80 last year (£107 for holiday visits).

Visits up 5.6% on 2012 to a record 32.8 million.

Nights up 6.6% on 2012 to 245.3 million.

Average stay was 7.5 nights (6.2 for holiday visits).

There was 9% decline in day visits (they accounted for 5% of all visits), reflecting the different visitor profile during the games in 2012.

Headline Trends in Inbound Tourism to the UK (2003-2013)					
Year	Number of Visits (millions)	Spend (£ billions)	Average Spend per Visit	Average Nights per Visit	International Balance of Payments (£ billions)
2003	24.715	£11.855	£475	8.2	-£16.695
2004	27.755	£13.047	£466	8.2	-£17.238
2005	29.971	£14.248	£471	8.3	-£17.906
2006	32.713	£16.002	£486	8.4	-£18.409
2007	32.778	£15.960	£487	7.7	-£19.053
2008	31.888	£16.323	£511	7.7	-£20.515
2009	29.889	£16.592	£554	7.7	-£15.102
2010	29.803	£16.899	£563	7.6	-£14.921
2011	30.798	£17.998	£584	7.6	-£13.703
2012	31.084	£18.640	£600	7.4	-£13.810
2013	32.813	£21.012	£640	7.5	-£13.888

MAIN JOURNEY PURPOSES

It was a record year for holiday visits at 12.7 million, an increase of 6.4%. Spend from holiday visits was 12% higher in nominal terms at £8.4 billion. VFR spend increased 14.6% on the previous year and visits were up 4.2% to 9.3 million not quite reaching the record of 9.7 million set in 2008. Business visits and spend were both higher than 2012.

Amongst all visits those for holiday accounted for 39%, VFR for 28% and business 24%. Other journey purposes (e.g. study) accounted for 9% of visits, a further breakdown will be available on website soon.

	Visits		Nights		Spend	
	(000)	Growth	(000)	Growth	(£m)	Growth (nominal)
Holiday	12,726	6%	79,294	8%	8,448	12%
VFR	9,327	4%	94,435	6%	4,524	15%
Business	7,945	7%	33,726	8%	5,014	11%

TOP MARKETS

Top ten markets by volume remain in the same order as 2012 - although the USA, Irish Republic and Spain had fewer visits.

Between them top ten account for two thirds (66%) of all visits.

From	Visits (<i>thousands</i>)	% of all visits	% change in 2013
1 France	3,930	12%	4%
2 Germany	3,126	10%	7%
3 USA	2,791	9%	-2%
4 Irish Republic	2,395	7%	-2%
5 Netherlands	1,922	6%	11%
6 Spain	1,704	5%	-1%
7 Italy	1,666	5%	10%
8 Poland	1,357	4%	11%
9 Belgium	1,188	4%	7%
10 Australia	1,070	3%	8%

Top ten markets in terms of value remain mostly the same, but some shift in order. In the top 3, Germany returns to 2nd (from 3rd in 2012) overtaking France. Irish Republic drops from 5th to 7th in terms of value. Spain and Italy move up one place each to 5th and 6th respectively. Norway enters the top 10 at 9th, moving Canada to tenth (9th in 2012). Switzerland moves just outside the top ten to 11th.

Between them the top ten markets account for just over half of the money spent by overseas visitors (52%).

From	Spend (<i>£ millions</i>)	% of all spend	% change in 2013
1 USA	£2,548	12%	5%
2 Germany	£1,408	7%	15%
3 France	£1,350	6%	-11%
4 Australia	£1,194	6%	17%
5 Spain	£905	4%	17%
6 Italy	£830	4%	9%
7 Irish Republic	£818	4%	3%
8 Netherlands	£720	3%	15%
9 Norway	£537	3%	21%
10 Canada	£533	3%	-5%

Within the top ten there are notable increases in number of nights from India (up to 8th from 10th place), driven by study and VFR (which both generate lengthy stays). There were increases in all markets except the USA. Whilst there was a decrease in nights from those visiting from the USA, the market still accounts for more nights than any other market. Between them the top ten account for 57% of all nights.

Full data for all markets will be on the VisitBritain website shortly.

Top Ten Markets by Nights (2013)			
From	Nights (<i>thousands</i>)	% of all nights	% change in 2013
1 USA	22,034	9%	-7%
2 France	19,055	8%	1%
3 Germany	18,897	8%	16%
4 Australia	14,963	6%	12%
5 Spain	14,530	6%	6%
6 Poland	11,915	5%	1%
7 Italy	11,469	5%	14%
8 India	9,582	4%	30%
9 Irish Republic	9,492	4%	5%
10 Netherlands	8,831	4%	16%

RECORDS BY MARKET

2013 was a strongest since 2003 for visits from 23 of the top 65 markets, including

- France (3,930,000)
- Netherlands (1,922,000)
- Italy (1,666,000)
- Norway (850,000)
- Sweden (794,000)
- Denmark (710,000)
- India (375,000)

2013 was a highest year for spend, since 2003 (in nominal terms) in 24 markets (of the top 65), including

- Germany (£1,408m)
- Netherlands (£720m)
- Italy (£830m)
- Australia (£1,194m)
- Norway (£537m)
- Sweden (£447m)
- Denmark (£443m)
- India (£441m)

FASTEST GROWING / DECLINING MARKETS

In terms of value (amount spent by visitors), over recent years in absolute terms China has grown most, followed by the USA and Australia. Kuwait and Germany are also in the top five.

These comparisons iron out annual peaks / troughs to provide a medium term view.

Principal markets showing recent growth (Average annual growth in spend 2009-2013)				Principal markets showing recent decline (Average annual growth in spend 2009-2013)			
Average absolute growth (£ millions)		Market	Average % growth	Average absolute growth (£ millions)		Market	Average % growth
China	£94	Mexico	54%	Irish Republic	-£55	Irish Republic	-6%
USA	£94	China	44%	Japan	-£24	Austria	-5%
Australia	£85	Oman	40%	Spain	-£24	Bulgaria	-5%
Kuwait	£66	Kuwait	40%	Malta	-£10	Israel (including Palestine)	-4%
Germany	£60	South Korea	34%	Austria	-£8	Hungary	-2%

SEASON

All quarters saw growth in visits, nights and spend (nominal) in 2013. Visits were up 11% in Q3, reflecting a slightly different visitor profile during Games time in 2012.

Percentage growth in 2013	Visits	Nights	Spend (nominal)
Jan-Mar	1%	6%	12%
Apr-Jun	5%	5%	14%
Jul-Sep	11%	9%	11%
Oct-Dec	3%	5%	15%

UK AREA

Visits to areas reflected the overall upward trend. The percentage increase in spend was higher than the increase in visits in London, Rest of England and Scotland.

There were notably fewer day visits in 2013, down 9% compared to 2012. Spend from these visits decreased by 41% in nominal terms (from £261 million to £153 million).

	Visits (000)	% change	Spend £m	% change
London	16,784	9%	£11,256	12%
Rest of England	13,629	6%	£7,141	15%
Scotland	2,443	10%	£1,680	20%
Wales	884	4%	£353	2%
Nil nights	1,644	-9%	£153	-41%

There has been little change in regional spread, with half of all visits including at least one night in London and just over half of expenditure by overseas visitors in London.

	% of visits	% of spend
London	51%	54%
Rest of England	42%	34%
Scotland	7%	8%
Wales	3%	2%