

HEADLINES – FEBRUARY 2014 (PROVISIONAL)¹

- There were 2.2 million visits to Britain during the month, up 9% on February 2013. Holiday visits posted double digit growth, compared with February 2013 while visits for VFR and business purposes also showed growth.
- Growth in the visits from Europe (EU15, Other Europe and Rest of Europe) were the main driver of overall visits growth, supported by the 'rest of world' markets. Visits from North American markets continued to decline compared with February 2013.
- Nominal spend was up significantly to a February record of £1.5 billion. This represents a 45% increase on February last year. This continues the trend of increasing spend in this traditionally lower spend month, although increases of this level have not been recorded before.

	FEB 2014		ROLLING 12 MONTHS (MAR 2013 - FEB 2014)	
		<i>% change vs. Feb 2013</i>		<i>% change vs. Mar '12 - Feb '13</i>
ALL VISITS (000)	2,150	9%	33,260	6%
Spend (£ million)	1,510	45%	21,610	15%

- While the growth in value of visits is encouraging, data for at least three months is needed before a picture of inbound tourism in 2014 begins to emerge. VisitBritain forecasts that in 2014 the volume of inbound visits will increase by 1.8% and the nominal value of visits by 4.2%.

Last 3 and 12 months

- Both visits and nominal spend remained in positive territory for the three-month period to February, with visits up 5% and nominal spend up 21% compared with same three months a year previously. Growth was recorded in visits from all markets with the exception of North America (down 8%) and for all journey purposes with the exception of miscellaneous, which fell by 5%.
- Over the 12 months up to and including February 2014, visits were up 6% and nominal spend increased by 15%, with both remaining at record levels for the March-February 12-month period. There has been growth in visits from all world regions during this time span, apart from North America from where visits have marginally declined, and all visit purposes have also posted growth.

¹ All monthly data is provisional. Final 2014 data will be released in April 2015.

Welcome to VisitBritain's monthly update on inbound tourism

Our monthly updates present the latest International Passenger Survey (IPS) data released by the Office for National Statistics (ONS).

The Quarterly Release for this period (January – March 2014) which may contain some revisions will be in July 2014.

The next Monthly Release will be on 15th May 2014 covering data for March 2014.

The [Insights & Statistics](#) section of the VisitBritain website has much more detail on long term trends, visits from individual markets and to UK regions

If you have any questions or feedback please email the Research team at VisitBritain via vb.research@visitbritain.org

Please note

All figures are provisional and subject to revision by ONS, all figures quoted are 'not seasonally adjusted'. Numbers in some tables / charts may not sum due to rounding.

Data is based on interviews with a sample of departing visitors. The number interviewed varies but is typically 4,000-5,000 per month.

'Visit' – all departing visits from overseas residents (including those who may be UK nationals but live elsewhere, excluding other nationals who have been in the UK for 12 months or longer)

'Spend' – the amount visitors report spending in the UK during their stay

Please refer to the final page for full glossary.

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LATEST SHORT TERM DATA - FEBRUARY AND LAST THREE MONTHS²

Holiday visits reached record-breaking levels in February 2014 growing 25% compared with February 2013. In the last 3 months, holiday visits were up 9% on the same period a year before.

VFR visits continued to grow, up by 2% from February 2013, the highest number of visits during February since a peak in 2008.

Business visits were up 9% compared with February 2013, matching the high recorded in 2008. Overall business visits are 5% higher in December-February compared with the same three months a year previously.

Visits for **miscellaneous purposes** (including study and those looking for work) are the only category to record a decline this month, dropping 16%.

	FEB 2014		LAST 3 MONTHS (DEC - FEB)	
	Visits (000)	% change vs. Feb 2013	Visits (000)	% change vs. Dec '12 - Feb '13
By journey purpose				
Holiday	720	25%	2,180	9%
VFR	570	2%	2,330	4%
Business	700	9%	1,790	5%
Miscellaneous	160	-16%	630	-5%
By world region				
EU15	1,350	10%	4,410	7%
Other EU	250	24%	800	15%
Rest of Europe	180	23%	490	2%
North America	130	-16%	540	-8%
Rest of World	250	7%	1,010	2%
ALL VISITS	2,150	9%	6,950	5%
Spend (£ million)	1,510	45%	4,550	21%

EU15 continued the strong growth seen in January 2014 with visits from these high volume markets recording growth of 10% against February 2013.

There was notable growth in visits from **other EU** and **Rest of Europe** countries, up 24% and 23% respectively compared with the same time last year and both recording record levels of visits.

North American visits were 16% lower than in February 2013.

'Rest of World' markets (outside Europe / N. America) increased their volume of visits by 7% over February 2013, a year-on-year increase of 2% in the 3 months to February 2014.

More: Q4 release on 08 May 2014 will provide visits by markets and UK region visited.

² These figures give an indication of the very latest trends, but should be used with caution. IPS is not designed to report accurately by month, and figures should be treated as indicative. Analysis of the last three months is more reliable.

MEDIUM TERM – LAST 12 MONTHS

Holiday: February was another record-breaker for rolling year visit volumes, with 13 million holiday visits. 2014 started off as a record year with 21% more holiday visits than this time last year.

VFR: there was growth of 4% in VFR visits during the 12 months to February 2014 compared with the previous 12 months.

Business: business visits were up 6% compared to the 12 months to February 2013.

EU15: a 5% increase compared to the previous 12 months took the total visits from these markets to 18.8 million.

Other EU: visits from other EU countries were up 19% to 3.4 million visits in the 12 month period to February 2014.

Rest of Europe: continues the growth seen in the EU15 and Other EU markets generating 3% growth in the past year.

North America: the number of visits in February fell to 2012 levels after a small increase in 2013. Total visits over the past 12 months dipped by 1% from last year.

Rest of World: at just under 5.3 million visits in the past 12 months these markets (Asia Pacific, Middle East, Latin America and Africa) recorded a 9% increase compared to the previous 12 months.

More: Data on longer term trends broken down by journey purpose, origin market, and season or UK region visited are available in our [Quarterly files](#)

ROLLING 12 MONTHS (MAR 2013 - FEB 2014)		
	Visits (000)	<i>% change vs. Mar '12 - Feb '13</i>
By journey purpose		
Holiday	13,040	9%
VFR	9,430	4%
Business	7,960	6%
Miscellaneous	2,790	1%
By world region		
EU15	18,790	5%
Other EU	3,370	19%
Rest of Europe	2,320	3%
North America	3,530	-1%
Rest of World	5,260	9%
ALL VISITS	33,260	6%
Spend (£ million)	21,610	15%

Percentage change in visits from European Markets

AWAITING DATA

NB. Charts show percentage not absolute changes so growth from smaller markets will be magnified (e.g. a change of around 1% from France equates to around 35,000 visits whilst a 1% change from China equates to just c.1,000 visits).

Percentage change in visits from Asian and African markets

AWAITING
DATA

Percentage change in visits from American, Gulf and Australasian markets

AWAITING DATA

More: Absolute data showing changes to actual visit numbers by market will be available in the Quarterly release for this period in July 2014

TRAVEL OVERSEAS BY UK RESIDENTS

- UK residents took marginally more overseas trips in February 2014 than in February 2013.
- Looking across the last three months UK residents took 2% more visits abroad than in the same period of 2012-13.

Business and VFR visits grew by 17% and 2% respectively while holiday visits declined by 2%.

Visits to All EU destinations were in line with the same period last year. Within this trips to other EU countries were up by 4% (EU15 down by 1%). Visits to North America were up by 4% compared with December-February 2013. Visits to 'Rest of World' countries were up by 5%.

- In the rolling year ending January 2014, Britain's international tourism balance of payments deficit stood at £12.77bn.

**LAST THREE MONTHS:
DECEMBER 2013 – FEBRUARY 2014**

*% change vs. Dec
'12 – Feb '13*

Visits (000)	9,990	2%
Spend (£ million)	5,380	-3%

More: VisitBritain attracts inbound visitors to Britain. For outbound travel from the UK visit [ONS website](#)

CONTEXT - Influencing Factors

- The wet and stormy weather experienced in Britain in the later part of 2013 and beginning of 2014 continued into February with coastal areas in the south west of England particularly affected in early February. Furthermore, the Met Office confirmed it was the wettest winter (December-February) in the UK since records began.
- Eurozone inflation fell to 0.7% in January while unemployment remained stable towards the end of 2013. Meanwhile, the US economy grew at an annual rate of 3.2% in the final three months of 2013 and unemployment fell to 6.6% in January, its lowest level since October 2008.
- By the end of February, Sterling was 5% more expensive than a year previously for Eurozone visitors whilst for US visitors it was 7% higher — though still considerably less expensive for both groups than pre 2009.

More: [Tourism Trends Quarterly](#) analyses influence of factors such as capacity, exchange rates, and the economy. [Trends Update](#) - fortnightly summary of economic and transport news shaping tourism.

The International Picture³

- Many of the UK's main competitors also report increased visits in 2013 compared to 2012. UK growth is in line with that of the Republic of Ireland, Spain, Netherlands, Australia and Switzerland with Germany and Italy showing slightly lower growth up to October/November. France shows slightly stronger growth than the UK although figures are only available up to September.
- Canada reported weaker figures than the UK as did Sweden, Mexico and China.
- Thailand, Greece and Turkey all saw double digit percentage growth in visits.

More: [Competitor Trends](#)

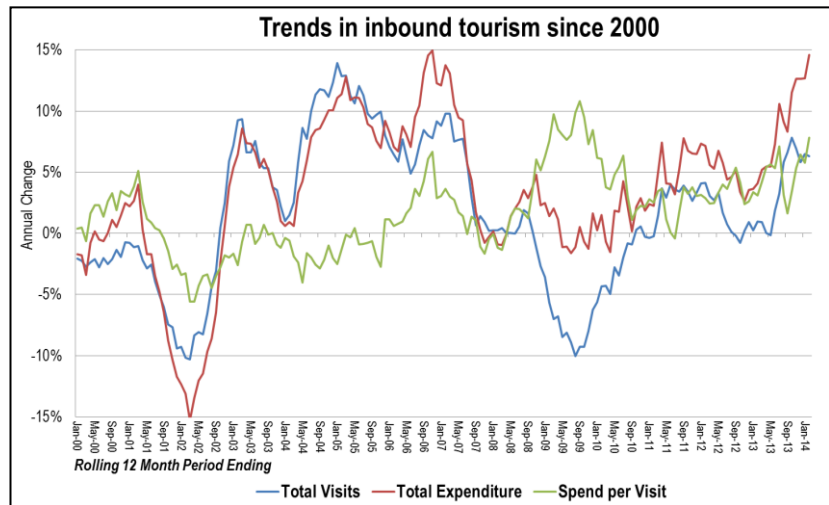
Destination	Growth in overseas visits	Period (Jan 2013 to ...)
Turkey	10%	December
France	8%	September
Rep. of Ireland	7%	November
USA	7%	March
UK	6%	December
Spain	6%	December
Netherlands	5%	October
Australia	5%	November
Switzerland	5%	November
Germany	4%	November
Italy	3%	October

³ Periods for which we have data available varies by country, so figures are indicative and necessarily directly comparable.

LONGER TERM TRENDS IN VISITS, SPEND, AND SPEND PER VISIT SINCE 2000

The chart below shows year-on-year change in headline IPS results based on a 'rolling twelve month' basis. Presenting the data in this way enables us to spot emerging trends and helps to 'smooth out' erratic results for any single month.

It clearly illustrates the dips in inbound tourism seen post foot and mouth and 9/11, and subsequent recovery to peaks in the mid-2000s, as well as the impact of economic situation in 2008 followed by slow but reasonably steady recovery with particularly strong figures recently.

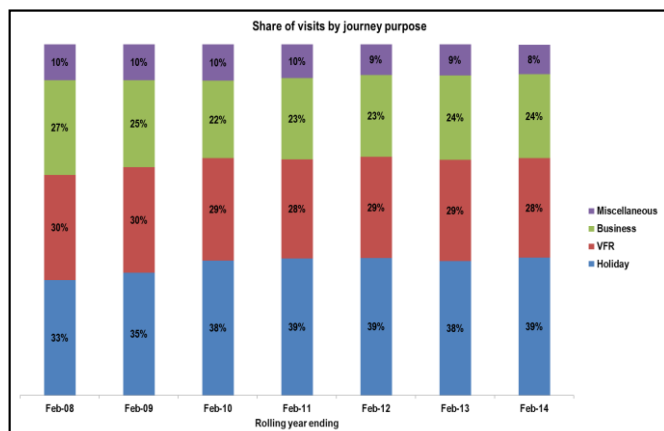


The last two years have seen more stability, with changes far less dramatic than those seen at several points over the last twelve years. Growth in expenditure has clearly risen since the middle of 2013.

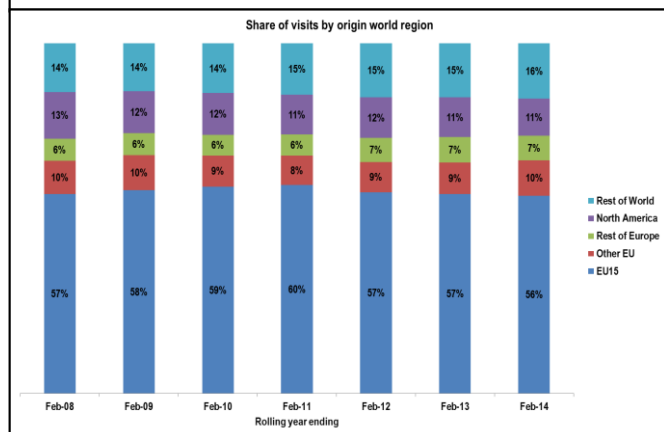
SHARE OF VISITS

The following two charts show that there have only been slight changes in the proportion of visits accounted for by any particular journey purpose or any origin world region over the last six years.

The first chart shows the greatest shift was in the proportion of visits accounted for by holidays, increasing from 34% in the rolling year to December 2008 to 38-9% from December 2009 onwards. VFR visits have accounted for around 30%, business for around a quarter (although shrinking from 25% to 22% in the year to December 2009) and miscellaneous for around 10% of visits over the last six years.



The second chart shows that European markets account for around three quarters of all visits, the bulk (just under 60%) from the EU15. North America accounts for 11%-12% and the 'Rest of World' markets for around 15% of visits, with a gradual increase in recent years.



More: Long term trends in visits from individual origin markets and world regions available [here](#)

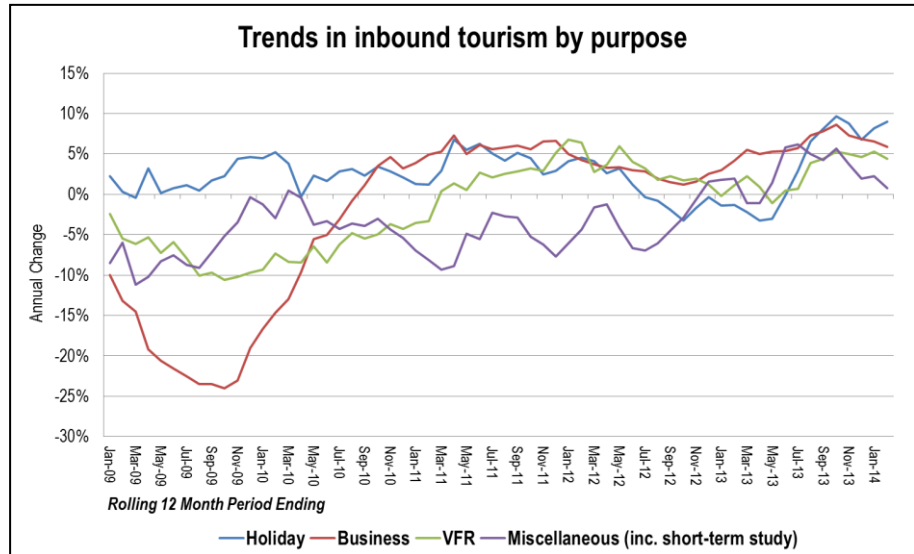
LONGER TERM TRENDS – JOURNEY PURPOSE

Holiday visits were far more resilient to the economic downturn in the late 2000s and have shown modest growth over the last couple of years and although there was some variability during 2012 recent trends have been more positive.

Business visits suffered a significant downturn in 2009, then a sustained recovery, currently showing stronger growth alongside holiday trips.

Trips to visit friends and relatives have also shown recovery over the longer term, although have been more variable recently.

Trips for other (miscellaneous) purposes account for a smaller number of visits and show the most variation recently, for example there was a boost by Olympic participants in late summer 2012.

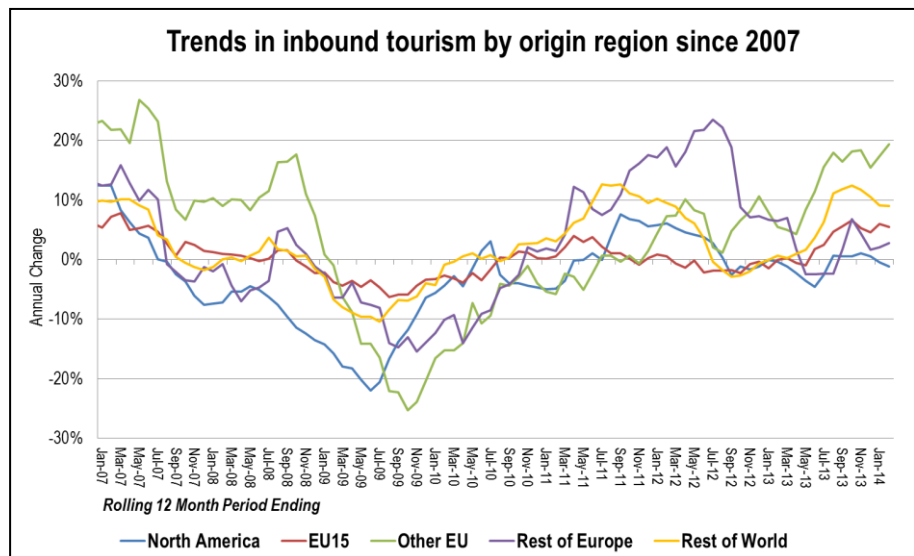


LONGER TERM TRENDS – WORLD REGION

The chart below shows the downward trend in visit numbers from all regions that began in the autumn of 2008, and the subsequent slow recovery from most regions followed by fewer dramatic changes recently.

As of the year ending December 2013 EU markets outside the EU15 and 'Rest of World' markets outside Europe or North America were showing strongest growth.

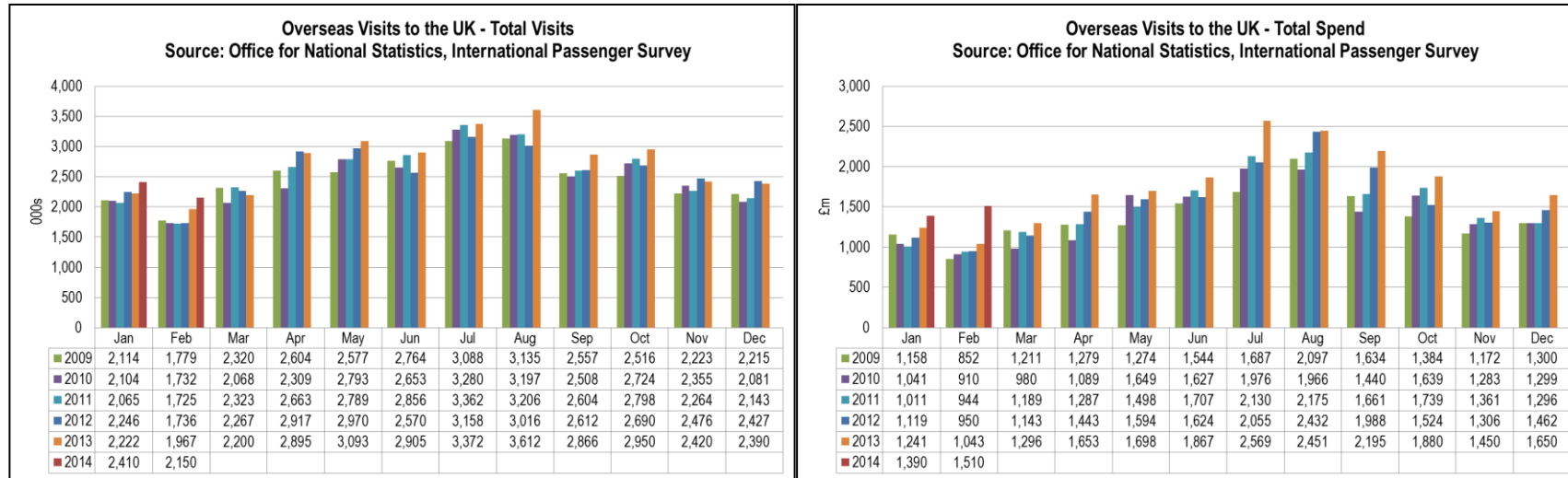
'Rest of Europe' had been delivering the fastest relative growth for over a year, although this has been more variable recently.



North America is now also just showing positive annual change.

More: Data on long term trends are available [here](#)

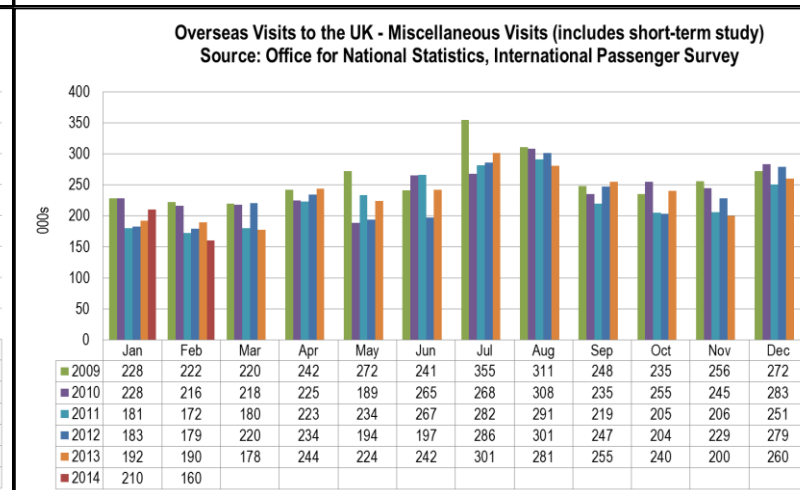
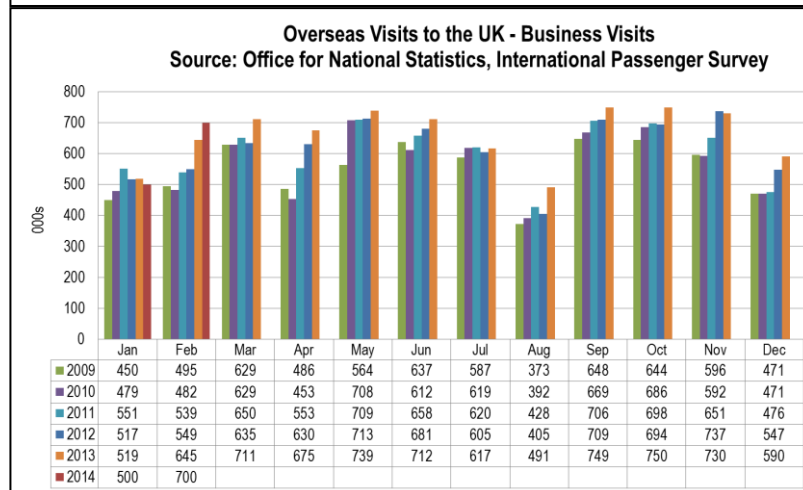
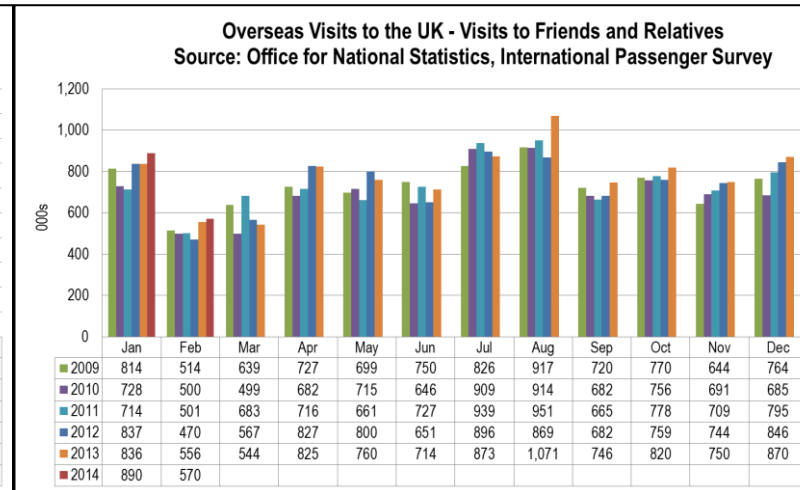
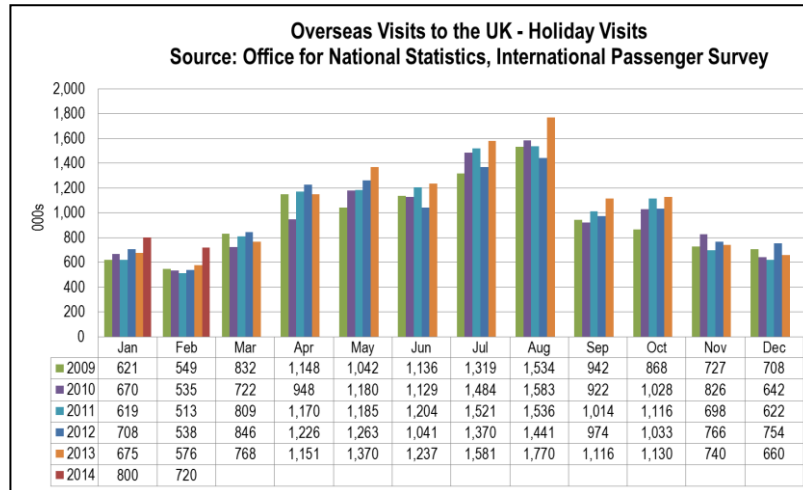
DETAILED MONTHLY TRENDS IN OVERALL VISITS AND SPEND⁴



More: Monthly data is replaced by the more accurate Quarterly data. Long term trends showing percentage change annually by and more is available [here](#)

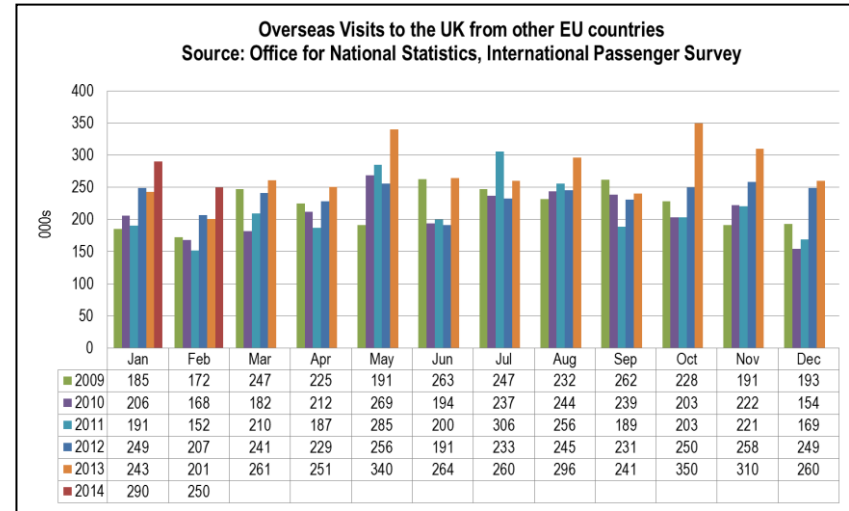
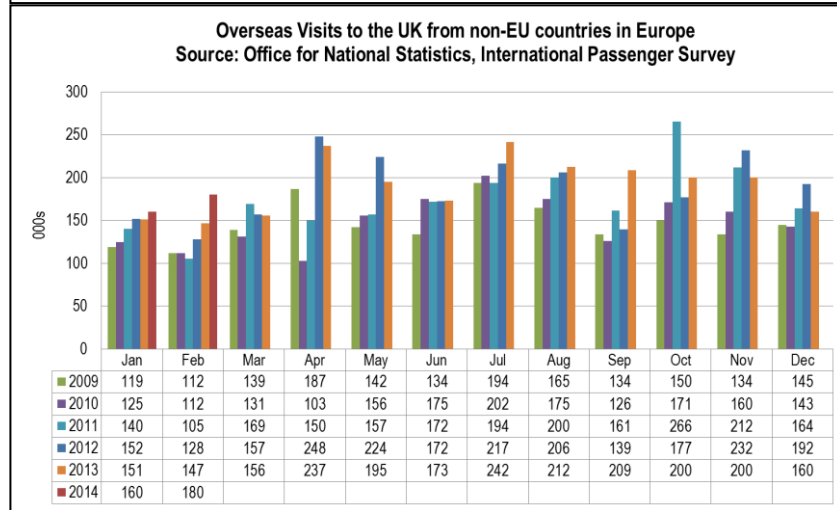
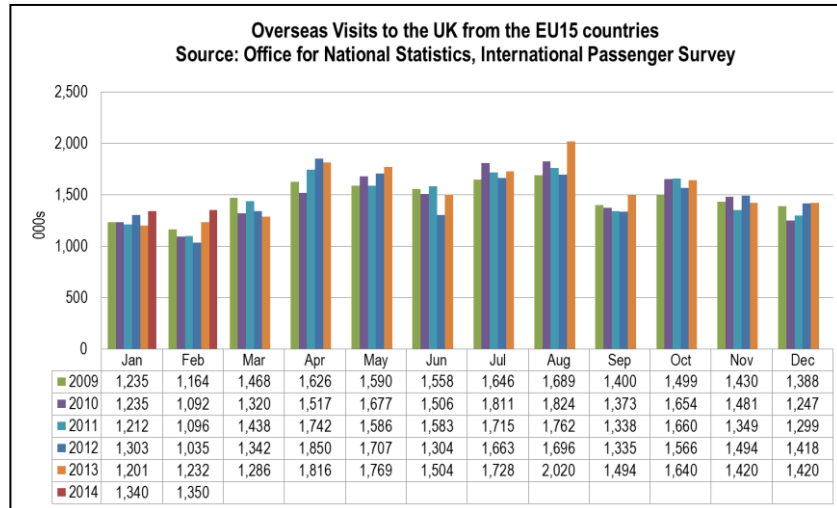
⁴ IPS is not designed to report accurately by month, and figures should be treated as indicative. The Quarterly Release for this period (January – March 2014) which may contain some revisions will be in July 2014.

DETAILED MONTHLY TRENDS IN VISITS BY JOURNEY PURPOSE

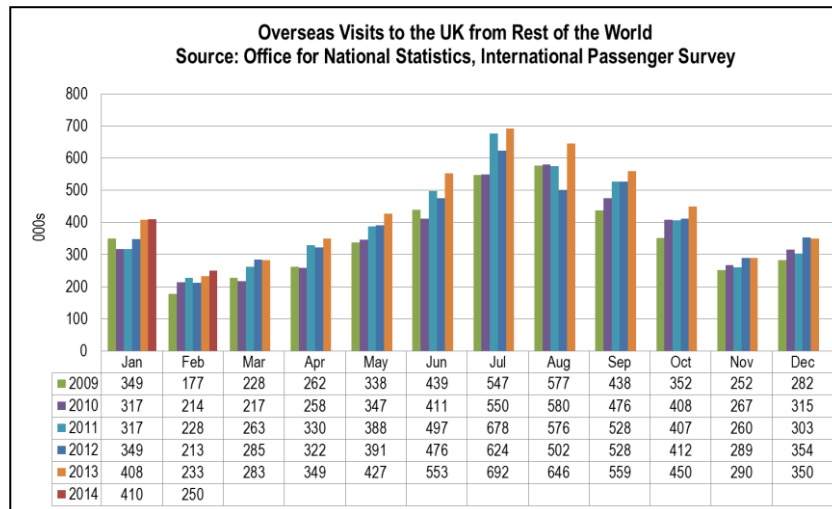
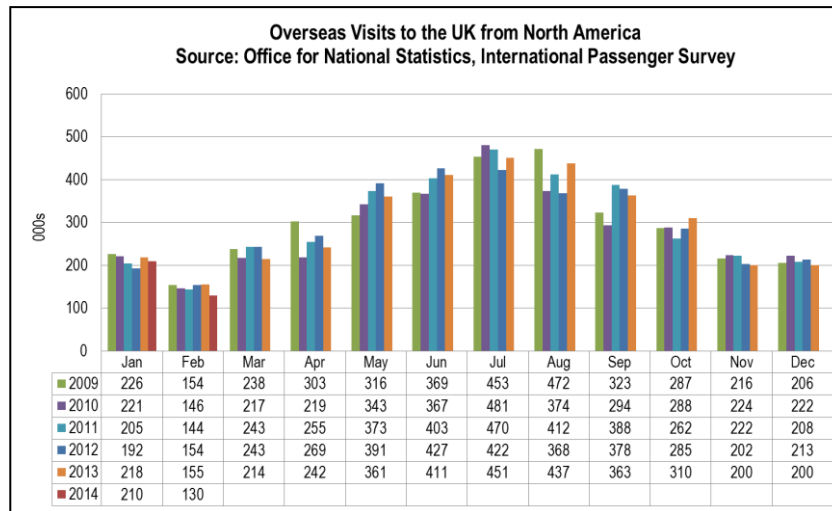


Please note that different scales are used on these charts to allow differences to be identified

DETAILED MONTHLY TRENDS BY REGION OF WORLD



Please note that different scales are used on these charts to allow differences to be identified



Definitions

EU15 - Austria, Belgium, Denmark, France, Finland, Germany, Greece, Irish Republic, Italy, Luxembourg, Netherlands, Portugal, Spain and Sweden.

Other EU - Bulgaria, Cyprus (South), Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia. Note that Croatia has been included in the 'Other EU' category since it joined in July 2013, before July 2013 this group was labelled as A12.

Rest of Europe – European countries outside the EU (including Russia, Norway and Switzerland). Before July 2013 Croatia was also included here, but from July 2013 appears in Other EU.

Rest of World – Countries outside Europe and North America (Africa, Asia, Central America, Middle East, Oceania, South America)

VFR - Visiting Friends and Relatives

Miscellaneous visits - includes those for short term study, to attend sports events, for personal shopping, health or religious purposes, accompanying others and many more.

More

The [Insights & Statistics](#) section of the VisitBritain website has much more detail on long term trends, data for individual markets and UK regions

Refer to the [ONS website](#) for more on IPS methodology and UK outbound travel

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If you have any questions or feedback please contact the Research team at VisitBritain via vb.research@visitbritain.org