

GB TOURISM SURVEY - April 2013 SUMMARY OF RESULTS

1. Headlines

- In April 2013, there were 9.3 million domestic overnight trips in Great Britain, a decrease of 16% on the April 2012 figure of 11.2 million.
- Both nights and spend also witnessed declines, with nights dropping from 32.9 to 24.8 million (-25%) and spend falling from £2.1 to £1.8 billion (-15%).
- Looking at England alone, the declines were slightly less severe for trips, night and spend, with trips falling by -14%, from 9.0 to 7.8 million, nights falling by -22%, from 25.8 to 20.2 million, and spend falling by -12%, from £1.7 to £1.5 billion.
- Looking at the year-to-date data, the number of trips taken in Great Britain has declined against the same period last year (-6%), with nights and spend also down, by -7% and -3% respectively.

2. Context

- The Easter holiday fell at the end of March, meaning that trips which started over the Easter weekend were counted in March, while April 2012 benefitted from all Easter trips. This is likely to have affected trip volumes for the month.
- April 2013 was a cold month, though mainly dry and sunny, with occasional snow flurries.

3. Trip Characteristics

- Looking at the year to date, holiday trips saw the largest decreases, with trips, nights and spend falling by -11%, -10% and -12% respectively. This is driven largely by declines in 4+ night holidays, which fell by -17% for trips, and -16% for spend.
- Visits to friends and relatives fell by -5%, with nights falling by -6%. However, positively, spend increased by 4% during this period, largely driven by an increase in expenditure in leisure VFR (up 10%).
- Business trips remained flat, with both nights and spend increasing by 3% and 5% respectively.
- Trips to the seaside declined most sharply in the first four months of the year (down -16%, for trips and -13% for spend), whereas trips to large cities/towns fared better (-1% for trips and +3% for spend).
- Trip declines were greater amongst those with no children in the household (-8% vs. -3% for those with kids). Greater declines were also evident amongst younger trip takers (those aged 16-24), with trips and spend down -12% and -21% respectively versus -3% and +5% respectively in the 45-54 age group.

4. Overseas Travel by UK Resident

- The number of trips abroad by UK residents in April remained flat against the same month last year, with spend up 2%.

5. Other Tourism Surveys

- In April 2013 England room occupancy increased by 1 percentage point when compared with the previous year, whilst bedspace occupancy fell by 1 percentage point.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
April '13									
GB	11.2	9.3	-16%	32.9	24.8	-25%	2,092	1,779	-15%
England	9.0	7.8	-14%	25.8	20.2	-22%	1,668	1,464	-12%
Jan-April '13									
GB	33.0	30.9	-6%	86.8	81.0	-7%	5,749	5,565	-3%
England	27.6	25.8	-7%	70.8	65.2	-8%	4,727	4,585	-3%

Purpose of Trip – April 2013

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	5.6	4.3	-24%	17.9	13.0	-28%	1,231	941	-24%
Business	1.6	1.7	+6%	3.9	3.6	-9%	425	426	0%
VFR	3.5	3.0	-13%	9.8	7.6	-23%	382	355	-7%
England									
Holiday	4.4	3.5	-22%	13.6	10.3	-24%	980	759	-23%
Business	1.3	1.4	+12%	3.3	3.0	-8%	342	362	+6%
VFR	2.9	2.6	-11%	7.9	6.4	-19%	301	295	-2%

Purpose of Trip – Year to Date (January – April 2013)

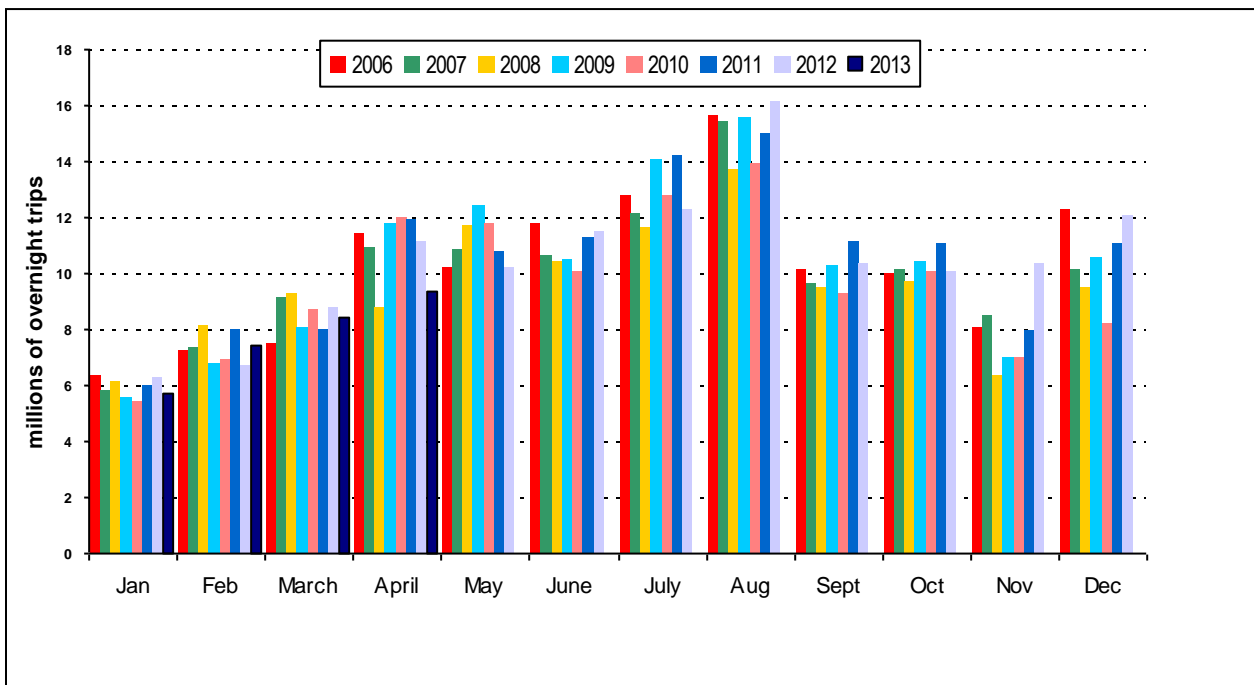
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	13.6	12.2	-11%	38.7	34.7	-10%	2,878	2,544	-12%
Business	5.9	5.9	0%	13.1	13.5	+3%	1,442	1,514	+5%
VFR	12.1	11.5	-5%	31.7	29.7	-6%	1,229	1,283	+4%
England									
Holiday	10.9	9.7	-11%	30.1	26.2	-13%	2,318	2,012	-13%
Business	5.0	5.0	+1%	11.2	11.2	-1%	1,208	1,289	+7%
VFR	10.6	10.0	-6%	26.8	25.0	-7%	1,032	1,084	+5%

Outbound Travel – UK Residents

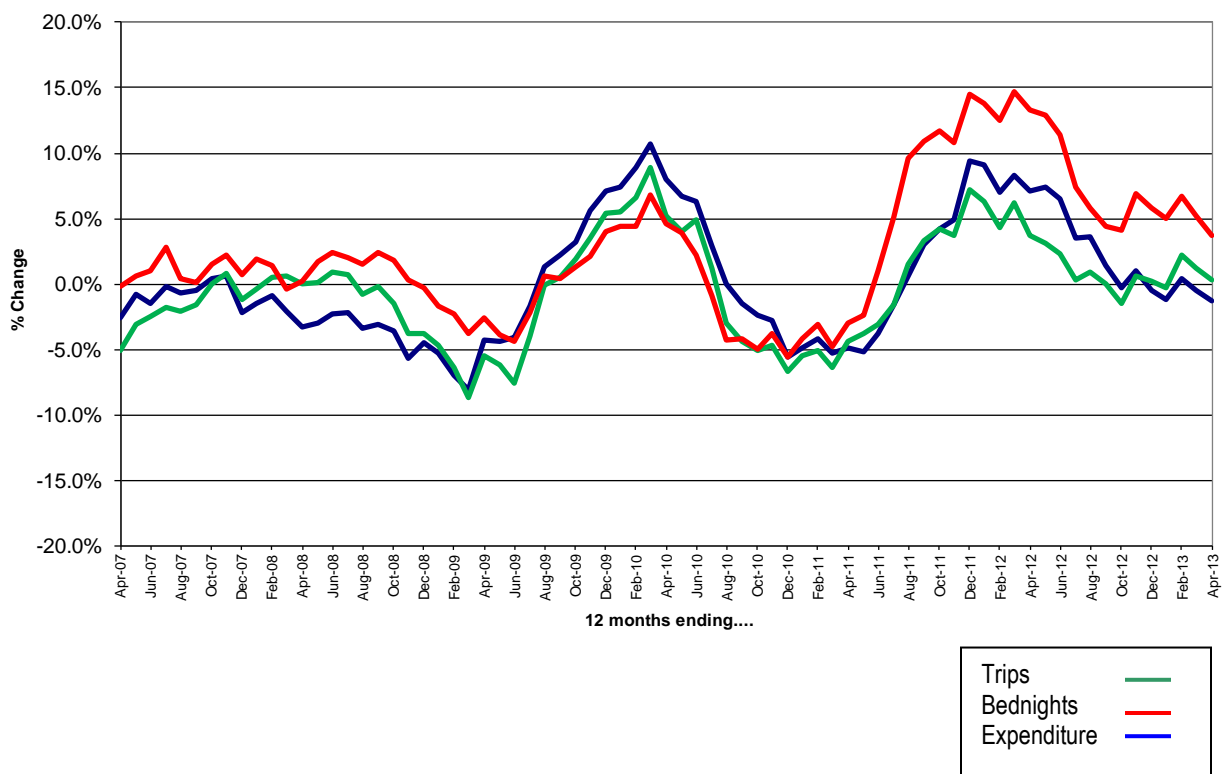
	TRIPS (MILLIONS)			SPEND (£BN)		
	2012	2013	% +/-	2012	2013	% +/-
April 2012	4.8	4.8	0%	2.7	2.8	+2%
May '12– April '13	56.8	56.4	-1%	32.0	32.6	+2%

TREND CHARTS

GB All Trips – Domestic Trip Volume by Month



GB All Trips - Annual Percentage Change



Year on Year Comparison, by Trip Characteristic

Important Note

The analysis on the following page shows year-on-year comparisons across a number of trip characteristics, considering:

- Month (April 2012 vs. April 2013)
- Year to date (Jan-April 2012 vs. Jan-April 2013)
- 12 month rolling (May 2011 - April 2012 vs. May 2012 - April 2013)

Percentage changes are colour coded:

Green indicates a change of over 5 percentage points **better** than the average across all trips (so a drop of -4% would be shaded green if all trips had declined by 10% over the same period)

Yellow indicates a change of within +/- 5 percentage points of the average

Orange indicates a change of more than 5 percentage points **worse** than the average

This analysis does **not necessarily indicate differences that are statistically significant**. For many of the categories included, particularly when reviewing single month data, changes would need to be much larger than the +/-5% cut-off point used to be statistically significant, and should always be reviewed in the context of the longer term trends. Even so, we feel that this analysis is helpful in understanding some of the market dynamics behind the overall monthly figures.

Sample sizes (underlying numbers of trips) are indicated on the spreadsheet – those with a very low base (fewer than 75 trips) have been “greyed out” to highlight that results should be treated with caution.

YEAR-ON-YEAR COMPARISON, BY TRIP CHARACTERISTIC

GBTs: Comparisons with equivalent periods, 2012

Comparisons with equivalent periods, 2012

LEGEND: Above Average Performance (Green), Average Performance (Yellow), Below Average Performance (Red)

NOTE: In the tables below, 'average performance' refers to the total trips/rights/expenditure to either GB or England in each time period. Those cells marked 'above average performance' indicate where the percentage change is more than 5 percentage points above the average; those marked 'below average performance' indicate where the percentage change is more than 5 percentage points below the average. These changes are not necessarily statistically significant - they only indicate those cells where changes are further away from the average. The numbers of unweighted trips are also displayed to indicate where sample sizes are relatively small. Where there are 75 or fewer unweighted trips, the % change figures have been greyed out to indicate that they should be treated with caution.

	Great Britain											
	Month: April 2013			Unweighted Trips	YTD: January - April 2013			Unweighted Trips	12 month rolling May 2012 - April 2013			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-16.2%	-24.7%	-15.0%	1342	-6.3%	-6.6%	-3.2%	4262	-1.3%	0.2%	3.7%	17091
PURPOSE:												
Pure Holiday	-23.8%	-27.6%	-23.6%	639	-10.5%	-10.3%	-11.6%	1728	-3.2%	-3.2%	2.8%	8124
- 1-3 nights holiday	-19.1%	-23.3%	-18.6%	446	-8.4%	-10.2%	-9.4%	1269	-1.9%	-2.1%	4.2%	5021
- 4+ nights holiday	-33.8%	-30.8%	-30.5%	193	-16.7%	-10.4%	-16.0%	459	-5.4%	-3.7%	1.4%	3103
VFR (on holiday)	-6.3%	-15.8%	5.4%	260	-1.9%	-1.8%	10.0%	933	6.2%	9.7%	14.6%	3637
HOLIDAY (TOTAL)	-19.4%	-24.8%	-19.1%	899	-7.8%	-7.6%	-7.5%	2661	-0.4%	0.2%	4.9%	11761
VFR (non-holiday)	-21.3%	-32.7%	-24.5%	194	-7.6%	-12.3%	-2.4%	752	-7.1%	-6.6%	1.8%	2729
VFR (TOTAL)	-13.2%	-22.7%	-7.1%	454	-4.6%	-6.4%	4.4%	1685	0.0%	2.9%	9.1%	6366
Business	5.6%	-8.5%	0.2%	201	-0.1%	2.6%	5.0%	680	0.5%	5.4%	-1.2%	2072
Regions:												
West Midlands	19.0%	-19.4%	29.2%	122	7.3%	0.1%	18.3%	339	3.9%	4.0%	16.3%	1147
East of England	10.3%	10.1%	20.5%	100	-4.3%	-0.6%	-13.3%	307	0.8%	4.7%	10.3%	1374
East Midlands	12.6%	-20.1%	-10.7%	103	-15.3%	-26.8%	-31.8%	278	-6.7%	-7.6%	-8.5%	1110
London	4.8%	23.2%	19.3%	157	6.3%	12.7%	16.4%	507	9.4%	9.5%	18.0%	1599
North West	-7.0%	-17.5%	-5.1%	153	-6.8%	-20.9%	-15.8%	496	-2.3%	-5.3%	-3.4%	1939
North East	-1.7%	0.1%	-4.2%	45	6.0%	20.5%	22.6%	168	3.7%	1.9%	11.7%	595
South East	-25.9%	-32.1%	-42.2%	187	-15.7%	-15.5%	-18.6%	579	-0.6%	-0.5%	3.4%	2363
South West	-33.0%	-36.9%	-27.4%	175	-11.6%	-5.0%	0.2%	557	-2.5%	2.8%	7.3%	2742
Yorkshire & the Humber	-41.7%	-53.5%	-27.2%	98	-12.7%	-16.4%	7.6%	373	-6.5%	-3.1%	5.9%	1504
LOCATION TYPE:												
Seaside	-30.3%	-37.4%	-36.7%	239	-15.6%	-19.1%	-12.6%	652	-4.2%	-4.1%	4.1%	3619
Large city/ large town	-3.4%	-12.7%	9.0%	598	-1.1%	-5.1%	2.6%	1956	0.7%	2.2%	4.5%	6633
Small town	-14.5%	-19.9%	-24.7%	327	-6.3%	-5.4%	-4.7%	1022	2.4%	2.4%	5.9%	4113
Countryside/ village	-30.7%	-35.4%	-29.5%	210	-9.4%	1.9%	-8.4%	711	-3.2%	0.6%	-0.6%	3191
AGE:												
16-24	-15.1%	-19.5%	-30.1%	132	-12.0%	-16.6%	-21.2%	508	-5.9%	2.8%	1.7%	1929
25-34	-22.3%	-30.6%	-13.2%	220	-7.5%	-11.0%	-7.2%	740	5.0%	2.5%	10.8%	3045
35-44	-13.5%	-29.7%	-20.2%	294	-5.7%	-7.5%	-3.9%	871	-11.8%	-6.8%	-9.0%	3461
45-54	-21.2%	-23.6%	-16.1%	234	-3.3%	-0.2%	4.7%	791	10.9%	8.1%	12.7%	3161
55+	-11.3%	-20.8%	-5.3%	463	-5.6%	-3.3%	0.5%	1352	-2.3%	-1.1%	4.2%	5495
SEG:												
AB	-13.4%	-21.4%	-4.8%	499	-1.3%	3.0%	9.5%	1535	2.6%	9.3%	11.0%	5774
C1	-11.4%	-11.3%	-22.4%	398	-8.7%	-5.9%	-7.9%	1257	-5.8%	-0.8%	-2.3%	5123
C2	-19.3%	-38.2%	-11.4%	241	-10.3%	-17.5%	-16.5%	720	0.1%	-6.1%	0.4%	3063
DE	-32.1%	-41.1%	-37.3%	204	-10.7%	-17.6%	-20.8%	749	-3.3%	-9.9%	-1.4%	3131
CHILDREN IN HH:												
Any	-21.3%	-36.8%	-18.8%	479	-2.9%	-12.3%	1.1%	1457	-0.3%	-0.8%	6.6%	6174
None	-13.5%	-18.5%	-13.4%	863	-7.7%	-4.2%	-4.7%	2805	-1.7%	0.7%	2.6%	10917
ACCOMMODATION:												
Commercial accom	-18.3%	-28.4%	-17.7%	854	-7.8%	-8.3%	-4.4%	2514	-1.5%	-2.2%	2.9%	10126
- Serviced accom	-8.9%	-18.7%	-10.0%	643	-2.8%	-3.8%	-1.7%	2027	0.6%	1.9%	3.2%	6972
- Hotel/motel/guesthouse	-8.3%	-18.0%	-7.6%	584	-2.3%	-2.4%	1.0%	1838	0.4%	1.9%	3.7%	6204
- Bed & Breakfast	-26.3%	-32.3%	-39.5%	54	-11.5%	-15.8%	-29.2%	175	1.2%	0.7%	-0.5%	712
Total self-catering rented	-38.0%	-39.3%	-42.5%	190	-21.9%	-17.3%	-10.8%	428	-6.0%	-7.9%	1.0%	2905
- Camping & Caravanning (inc. owned caravans)	-37.5%	-41.3%	-50.2%	135	-23.4%	-24.7%	-31.2%	262	-7.7%	-4.9%	-4.9%	2113
- Other self-catering rented	-37.0%	-35.0%	-36.3%	84	-13.1%	-4.7%	2.4%	244	-0.2%	-5.3%	6.8%	1255
Hostels	-51.2%	-50.0%	36.4%	9	-65.1%	-59.1%	-73.3%	19	1.8%	-10.2%	10.1%	172
Own home/friends'/relatives'	-9.4%	-14.6%	1.9%	478	-4.1%	-4.1%	0.4%	1694	-0.8%	3.9%	4.3%	6787

	England											
	Month: April 2013			Unweighted Trips	YTD: January - April 2013			Unweighted Trips	12 month rolling May 2012 - April 2013			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-13.7%	-21.7%	-12.2%	1120	-6.5%	-7.9%	-3.0%	3568	-0.9%	0.8%	6.4%	14157
PURPOSE:												
Pure Holiday	-22.2%	-24.3%	-22.6%	513	-11.0%	-12.8%	-13.2%	1373	-2.5%	-2.3%	5.4%	6469
- 1-3 nights holiday	-16.5%	-19.9%	-19.5%	363	-7.2%	-9.2%	-9.6%	1030	-1.4%	-2.1%	4.9%	4075
- 4+ nights holiday	-34.1%	-27.7%	-27.2%	151	-21.9%	-16.4%	-20.9%	339	-4.4%	-2.4%	5.9%	2382
VFR (on holiday)	0.0%	-5.0%	16.3%	224	-2.0%	-2.2%	12.0%	794	4.7%	7.4%	15.5%	3068
HOLIDAY (TOTAL)	-16.5%	-19.7%	-16.9%	738	-8.0%	-9.4%	-8.4%	2165	-0.3%	0.4%	7.2%	9537
VFR (non-holiday)	-23.4%	-36.6%	-24.4%	168	-9.8%	-12.1%	-2.9%	663	-6.3%	-5.5%	1.8%	2400
VFR (TOTAL)	-11.4%	-19.3%	-2.0%	392	-5.8%	-6.7%	5.0%	1457	-0.4%	1.9%	9.5%	5469
Business	12.2%	-8.1%	5.8%	172	0.9%	-0.5%	6.7%	584	1.7%	7.0%	3.7%	1745
Regions:												
West Midlands	19.0%	-19.4%	29.2%	122	7.3%	0.1%	18.3%	339	3.9%	4.0%	16.3%	1147
East of England	10.3%	10.1%	20.5%	100	-4.3%	-0.6%	-13.3%	307	0.8%	4.7%	10.3%	1374
East Midlands	12.6%	-20.1%	-10.7%	103	-15.3%	-26.8%	-31.8%	278	-6.7%	-7.6%	-8.5%	1110
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North West	-7.0%	-17.5%	-5.1%	153	-6.8%	-20.9%	-15.8%	496	-2.3%	-5.3%	-3.4%	1939
North East	-1.7%	0.1%	-4.2%	45	6.0%	20.5%	22.6%	168	3.7%	1.9%	11.7%	595
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LOCATION TYPE:												
Seaside	-27.5%	-34.0%	-31.6%	199	-14.2%	-20.3%	-8.7%	532	-2.6%	-0.8%	8.8%	2925
Large city/ large town	-2.2%	-10.4%	13.3%	628	0.4%	-3.5%	6.2%	1730	1.1%	2.2%	5.9%	5733
Small town	-14.4%	-22.7%	-28.2%	296	-7.9%	-7.7%	-8.1%	821	2.9%	2.4%	8.9%	3307
Countryside/ village	-27.3%	-27.6%	-27.4%	165	-14.8%	-5.1%	-18.8%	550	-4.9%	-0.5%	2.4%	2534
AGE:												
16-24	-5.1%	-11.6%	-18.8%	114	-8.8%	-13.9%	-17.8%	443	-3.0%	5.6%	9.5%	1670
25-34	-22.7%	-35.2%	-23.7%	181	-10.4%	-17.4%	-8.4%	608	5.1%	1.9%	11.3%	2543
35-44	-19.2%	-32.9%	-28.0%	231	-6.7%	-10.0%	-5.7%	718	-10.5%	-6.8%	-3.3%	2876
45-54	-13.9%	-17.7%	-9.4%	199	-2.4%	-4.3%	8.6%	667	10.8%	10.3%	16.7%	2591
55+	-6.6%	-12.3%	7.7%	395	-5.8%	-0.7%	-1.2%	1129	-3.1%	-1.2%	3.3%	4473
SEG:												
AB	-5.7%	-13.2%	4.2%	438	2.5%	7.0%	14.1%	1330	4.9%	11.6%	16.2%	4865
C1	-10.7%	-7.3%	-20.4%	337	-12.0%	-8.6%	-8.8%	1052	-7.5%	-2.1%	-1.4%	4233
C2	-23.7%	-47.5%	-29.0%	175	-14.5%	-28.9%	-28.6%	552	-1.2%	-8.4%	-1.2%	2447
DE	-32.5%	-36.6%	-29.2%	165	-9.8%	-15.0%	-15.3%	622	-0.2%	-5.7%	3.5%	2595
CHILDREN IN HH:												
Any	-20.0%	-36.2%	-21.2%	398	-3.0%	-15.6%	3.0%	1220	1.2%	0.2%	11.4%	5153
None	-10.4%	-14.3%	-8.5%	721	-7.9%	-4.6%	-5.1%	2348	-1.8%	1.1%	4.4%	9011
ACCOMMODATION:												
Commercial accom	-16.3%	-27.0%	-16.4%	702	-6.8%	-9.4%	-3.8%	2090	-0.1%	0.0%	5.8%	8296
- Serviced accom	-6.7%	-16.2%	-8.3%	541	-2.1%	-5.7%	-1.2%	1704	1.3%	1.4%	4.9%	5907
- Hotel/motel/guesthouse	-4.5%	-13.7%	-3.7%	494	-0.8%	-3.4%	2.4%	1550	1.3%	1.4%	5.1%	5189
- Bed & Breakfast	-36.2%	-40.1%	-50.9%	44	-16.8%	-24.6%	-36.1%	144	1.1%	2.4%	6.7%	579
Total self-catering rented	-37.2%	-39.5%	-41.8%	146	-21.1%	-19.6%	-12.0%	338				