

## GB TOURISM SURVEY – August 2013 SUMMARY OF RESULTS

### 1. Headlines

- In August 2013 there were 16.7 million domestic overnight trips in Great Britain, a 3% increase from 2012, when there were 16.2 million trips in August (which in turn was an 8% increase on 2011). This was the highest number of trips recorded in the month of August since the survey began in 2006.
- While there was also an increase in expenditure of 2%, nights decreased by 2% from 65.3 million in 2012 to 63.9 million in 2013.
- In England, the number of trips increased slightly, by 1% to 13.4 million from 13.2 million in 2012 (a year that saw an 8% increase on visitation compared to 2011). Spend decreased slightly (-1%), while nights decreased by -4%, from 50.9 million to 49.0 million.
- Looking at the first eight months of the year, the number of trips (-1%) and expenditure (0%) have remained broadly flat in 2013 compared to 2012 in Great Britain, while there was a slight decrease in nights (-2%).

### 2. Context

- In 2012, The Olympic Games took place between the 27<sup>th</sup> of July and the 12<sup>th</sup> of August, and the Paralympic Games between the 29<sup>th</sup> of August and the 9<sup>th</sup> of September. These events may have affected trip-taking patterns in that year.
- August temperatures were slightly above average, particularly early in the month with a continuation of the July heat wave. This was also the driest August since 2003, though this varied across the country with some areas, such as the Pennines and west Cornwall, receiving more rain than usual.

### 3. Trip Characteristics

- In the year to date, holiday trips remain flat (down 1%) at 40.9 million, while expenditure has decreased slightly, by 2%. 4+ night holidays increased in August compared to last year (5%), and are flat (0% change) for the year-to-date, while 1-3 night holidays are down slightly for the year (-1%, with a -3% decline in August).
- Visits to friends and relatives are up slightly for the year (2%), with expenditure up by 7%. Leisure VFR has particularly increased this year (5% increase in trips and 10% in spend).
- Business trips (-5%), nights (-9%) and expenditure (-3%) have declined so far this year.
- So far this year, the West Midlands (10%), London (5%) and the South East (5%) have seen a growth in trip volumes, while all other regions have seen a decrease.

### 4. Overseas Travel by UK Resident

- The number of trips taken abroad by UK residents in August increased by 8% compared to August last year, with spend up 13%. Looking at the year to date, trips are up 3% and spend 5%.

### 5. Other Tourism Surveys

- In August 2013 England room occupancy increased by 4% and bedspace occupancy by 5% compared to August 2012.

## KEY MEASURES



### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>August '13</b>									
GB	16.2	16.7	+3%	65.3	63.9	-2%	3,360	3,438	+2%
England	13.2	13.4	+1%	50.9	49.0	-4%	2,704	2,681	-1%
<b>Jan-Aug '13</b>									
GB	83.1	82.7	-1%	265.0	259.7	-2%	16,065	16,072	0%
England	68.6	67.8	-1%	210.2	204.0	-3%	12,986	12,867	-1%

### Purpose of Trip – August 2013

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>GB</b>									
Holiday	10.0	10.1	+1%	45.4	44.0	-3%	2,471	2,493	+1%
Business	1.2	1.4	+16%	3.5	3.3	-8%	285	339	+19%
VFR	4.6	4.9	+5%	15.5	15.6	+1%	554	526	-5%
<b>England</b>									
Holiday	7.9	7.8	-1%	34.4	32.4	-6%	1,964	1,902	-3%
Business	1.1	1.2	+8%	3.2	2.6	-20%	253	287	+13%
VFR	3.9	4.1	+4%	12.6	13.1	+5%	441	423	-4%

### Purpose of Trip – Year to Date (January – August 2013)

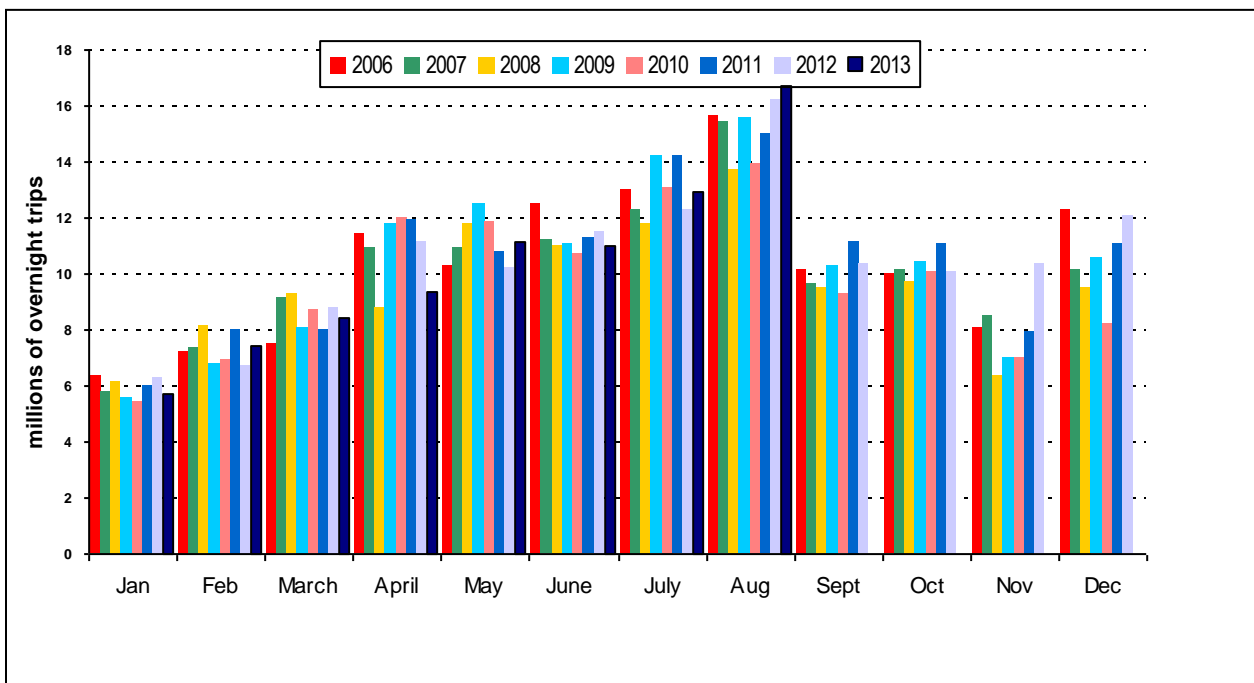
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>GB</b>									
Holiday	41.1	40.9	-1%	152.2	149.4	-2%	9,685	9,535	-2%
Business	12.3	11.7	-5%	29.8	27.0	-9%	3,026	2,936	-3%
VFR	26.9	27.3	+2%	75.3	75.6	0%	2,942	3,139	+7%
<b>England</b>									
Holiday	32.5	32.1	-1%	115.9	111.8	-4%	7,670	7,391	-4%
Business	10.4	10.0	-4%	25.0	22.0	-12%	2,549	2,460	-4%
VFR	23.3	23.3	0%	62.8	63.4	+1%	2,420	2,606	+8%

### Outbound Travel – UK Residents

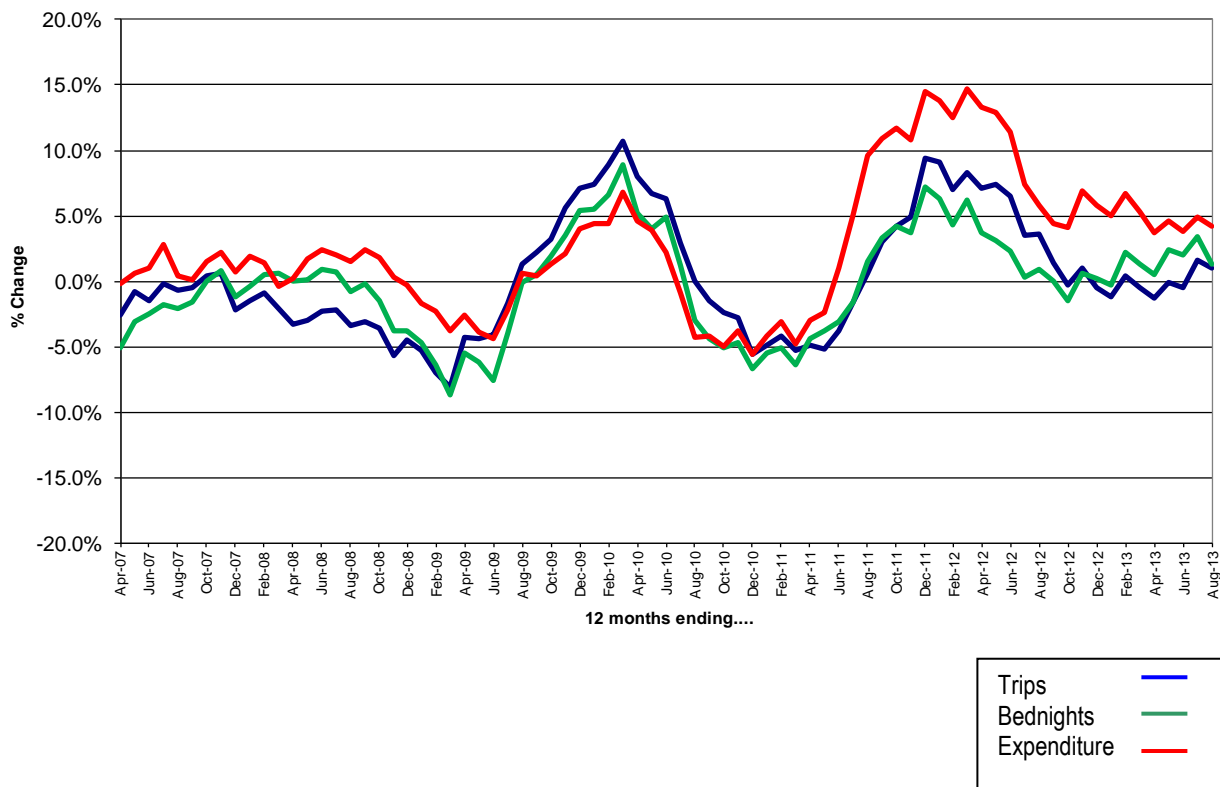
	TRIPS (MILLIONS)			SPEND (£BN)		
	2012	2013	% +/-	2012	2013	% +/-
<b>Aug 2013</b>	7.2	7.7	+8%	4.4	5.0	+13%
<b>Jan '12-Aug '13</b>	38.6	39.9	+3%	22.4	23.5	+5%
<b>Sep '12- Aug '13</b>	56.4	57.8	+2%	32.4	33.6	+4%

# 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 (August 2012 vs. August 2013)
- Year to date (Jan-Aug 2012 vs. Jan-Aug 2013)
- 12 month rolling (Sep 2011 – Aug 2012 vs. Sep 2012 - Aug 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

<b>LEGEND:</b>	Above Average Performance	Average Performance	Below Average Performance
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**NOTE:** In the tables below, 'average performance' refers to the total trips/nights/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: August 2013			YTD: January - August 2013			12 month rolling Sep 2012 - Aug 2013			Unweighted Trips		
	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure
<b>TOTAL</b>	3.1%	-2.1%	2.3%	2533	-0.5%	-2.0%	0.0%	11911	1.0%	1.2%	4.2%	17178
<b>PURPOSE:</b>												
Pure Holiday	0.6%	-3.2%	0.9%	1554	-0.7%	-1.8%	-1.5%	6059	0.6%	0.0%	4.0%	8195
- 1-3 nights holiday	-3.4%	-1.6%	0.9%	750	-1.3%	-2.1%	-3.4%	3618	0.4%	0.3%	4.3%	5059
- 4+ nights holiday	4.8%	-3.7%	0.9%	805	0.2%	-1.7%	0.3%	2440	0.9%	-0.2%	3.7%	3136
VFR (on holiday)	11.3%	8.2%	-5.0%	502	5.3%	6.2%	9.9%	2352	10.2%	13.8%	16.1%	3272
<b>HOLIDAY (TOTAL)</b>	3.0%	-1.1%	0.1%	2057	0.9%	0.0%	0.2%	8410	3.4%	3.6%	6.1%	11922
VFR (non-holiday)	-6.4%	-14.4%	-5.8%	255	-3.0%	-8.4%	2.0%	1722	-5.7%	-7.2%	5.5%	2684
<b>VFR (TOTAL)</b>	4.7%	0.7%	-5.1%	758	1.6%	0.3%	6.7%	4074	2.8%	5.1%	11.6%	6412
Business	15.9%	-7.9%	18.9%	169	-4.6%	-9.4%	-3.0%	1393	-2.9%	-6.7%	-4.1%	2012
<b>Regions:</b>												
West Midlands	21.0%	-11.4%	35.7%	146	10.6%	3.6%	13.0%	805	12.2%	7.2%	22.2%	1193
East of England	-3.5%	-15.5%	4.3%	195	-4.6%	-11.7%	-15.7%	874	-0.2%	-5.7%	-4.2%	1315
East Midlands	1.9%	-2.9%	-4.1%	152	-4.5%	-12.1%	-14.9%	765	-0.5%	-2.5%	-5.3%	1113
London	-1.2%	-16.2%	-1.4%	183	5.4%	1.2%	8.6%	1093	8.1%	1.7%	16.8%	1601
North West	0.7%	5.0%	-1.7%	250	-4.6%	-9.5%	-10.2%	1284	-3.9%	-5.7%	-8.2%	1912
North East	-24.4%	-18.9%	5.3%	64	-4.3%	4.0%	11.0%	406	-3.8%	2.6%	6.0%	579
South East	19.5%	33.5%	8.5%	374	5.2%	8.2%	-2.2%	1764	9.3%	9.5%	8.6%	2557
South West	-5.5%	-11.3%	-15.0%	492	-5.7%	-4.3%	-0.3%	1918	-3.5%	0.7%	3.5%	2659
Yorkshire & the Humber	-1.5%	-4.1%	6.9%	205	-8.3%	-4.4%	8.0%	989	-9.7%	-2.3%	8.3%	1452
<b>LOCATION TYPE:</b>												
Seaside	-6.2%	-12.2%	-15.3%	721	-4.3%	-7.8%	-5.3%	2635	-3.2%	-5.0%	0.2%	3569
Large city/ large town	0.3%	0.6%	3.8%	768	0.4%	-0.4%	2.5%	4478	0.4%	0.4%	4.6%	6629
Small town	4.9%	-0.5%	-1.2%	560	-1.7%	-1.1%	-3.0%	2744	4.3%	6.0%	5.8%	4107
Countryside/ village	20.2%	9.9%	35.1%	574	1.5%	2.4%	4.8%	2351	2.6%	4.8%	6.3%	3290
<b>AGE:</b>												
16-24	17.5%	6.9%	3.7%	249	1.8%	-3.3%	-7.1%	1337	3.7%	5.0%	2.9%	2001
25-34	-17.3%	-17.5%	-21.1%	446	-2.1%	-5.4%	-6.5%	2133	0.7%	-4.2%	0.5%	3056
35-44	2.8%	-18.5%	-7.9%	578	1.1%	-6.3%	-2.6%	2479	-4.8%	-5.9%	-4.6%	3430
45-54	5.5%	13.1%	14.3%	464	-5.8%	-0.5%	2.3%	2088	3.3%	6.3%	9.4%	3027
55+	12.3%	10.8%	16.2%	796	2.4%	2.1%	6.3%	3874	3.0%	4.1%	9.2%	5664
<b>SEG:</b>												
AB	1.0%	-9.9%	-4.6%	824	-0.6%	-2.3%	0.8%	4027	1.4%	1.5%	6.3%	5742
C1	8.3%	3.5%	0.1%	763	1.5%	-1.2%	2.4%	3585	0.6%	2.0%	5.2%	5196
C2	-0.7%	6.8%	11.8%	493	-2.4%	-0.6%	-3.8%	2179	1.1%	1.5%	-0.4%	3148
DE	2.7%	-4.0%	19.3%	454	-2.4%	-4.8%	-3.7%	2120	0.7%	-1.8%	0.4%	3093
<b>CHILDREN IN H/H:</b>												
Any	-2.1%	-11.4%	-7.3%	1099	-0.3%	-6.0%	-4.3%	4339	-0.2%	-2.5%	-0.3%	6077
None	6.9%	5.9%	8.3%	1434	-0.6%	0.0%	1.9%	7572	1.6%	2.9%	6.0%	11101
<b>ACCOMMODATION:</b>												
Commercial accom	1.0%	-1.9%	0.0%	1628	-0.7%	-1.6%	0.3%	7418	0.9%	0.7%	4.3%	10203
- Serviced accom	6.2%	4.8%	7.7%	840	1.4%	1.5%	1.6%	4892	2.1%	3.7%	4.0%	7036
- Hotel/motel/guesthouse	7.0%	2.5%	7.0%	728	2.0%	2.4%	2.5%	4351	2.4%	3.6%	4.3%	6278
- Bed & Breakfast	-9.3%	-9.4%	-12.3%	92	-6.4%	-11.9%	-18.9%	502	-3.8%	-5.1%	-10.4%	686
Total self-catering rented	0.9%	-1.5%	-5.2%	789	-1.4%	-2.5%	0.3%	2425	0.1%	-1.4%	6.1%	2968
- Camping & Caravanning (inc. owned caravans)	2.1%	-11.4%	6.5%	612	0.7%	-6.0%	-2.4%	1841	-0.5%	-5.6%	-1.1%	2186
- Other self-catering rented	0.3%	0.1%	-13.3%	271	-4.5%	0.9%	4.6%	928	3.4%	6.1%	14.4%	1239
Hostels	-64.2%	-77.1%	-69.2%	12	-61.4%	-56.0%	-65.4%	56	-34.0%	-38.0%	-29.8%	121
Own home/friends/relatives'	2.9%	-7.1%	-1.3%	885	0.4%	-2.4%	2.6%	4388	1.9%	2.6%	7.3%	6820

	England											
	Month: August 2013			YTD: January - August 2013			12 month rolling Sep 2012 - Aug 2013			Unweighted Trips		
	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure
<b>TOTAL</b>	1.4%	-3.7%	-0.9%	2028	-1.2%	-3.0%	-0.9%	9764	0.8%	0.9%	5.0%	14172
<b>PURPOSE:</b>												
Pure Holiday	-1.4%	-5.9%	-3.2%	1206	-1.2%	-3.5%	-3.6%	4758	0.6%	-0.9%	3.6%	6508
- 1-3 nights holiday	-4.0%	-1.5%	2.2%	594	-0.5%	-1.7%	-3.6%	2908	1.5%	1.2%	5.3%	4114
- 4+ nights holiday	1.4%	-7.2%	-6.0%	612	-2.5%	-4.5%	-3.7%	1843	-1.1%	-2.1%	1.7%	2382
VFR (on holiday)	16.1%	20.2%	-2.0%	420	4.5%	9.0%	10.1%	1976	9.5%	15.9%	18.3%	3132
<b>HOLIDAY (TOTAL)</b>	2.6%	-1.0%	-3.0%	1626	0.4%	-0.5%	-1.5%	6732	3.3%	3.7%	6.2%	9641
VFR (non-holiday)	-13.5%	-21.8%	-8.8%	213	-6.1%	-10.2%	4.3%	1491	-7.5%	-8.8%	6.3%	2332
<b>VFR (TOTAL)</b>	4.3%	4.6%	-4.1%	634	-0.4%	0.9%	7.7%	3467	1.5%	5.3%	13.1%	5466
Business	8.0%	-19.5%	13.4%	141	-3.8%	-12.2%	-3.5%	1188	-1.4%	-8.0%	-1.8%	1697
<b>Regions:</b>												
West Midlands	21.0%	-11.4%	35.7%	146	10.6%	3.6%	13.0%	805	12.2%	7.2%	22.2%	1193
East of England	-3.5%	-15.5%	4.3%	195	-4.6%	-11.7%	-15.7%	874	-0.2%	-5.7%	-4.2%	1315
East Midlands	1.9%	-2.9%	-4.1%	152	-4.5%	-12.1%	-14.9%	765	-0.5%	-2.5%	-5.3%	1113
London	-1.2%	-16.2%	-1.4%	183	5.4%	1.2%	8.6%	1093	8.1%	1.7%	16.8%	1601
North West	0.7%	5.0%	-1.7%	250	-4.6%	-9.5%	-10.2%	1284	-3.9%	-5.7%	-8.2%	1912
North East	-24.4%	-18.9%	5.3%	64	-4.3%	4.0%	11.0%	406	-3.8%	2.6%	6.0%	579
South East	19.5%	33.5%	8.5%	374	5.2%	8.2%	-2.2%	1764	9.3%	9.5%	8.6%	2557
South West	-5.5%	-11.3%	-15.0%	492	-5.7%	-4.3%	-0.3%	1918	-3.5%	0.7%	3.5%	2659
Yorkshire & the Humber	-1.5%	-4.1%	6.9%	205	-8.3%	-4.4%	8.0%	989	-9.7%	-2.3%	8.3%	1452
<b>LOCATION TYPE:</b>												
Seaside	-10.6%	-22.2%	-20.5%	547	-5.2%	-11.6%	-6.6%	2083	-3.4%	-7.3%	0.6%	2856
Large city/ large town	2.0%	1.3%	6.2%	649	1.5%	0.1%	4.8%	3899	1.1%	0.7%	6.1%	5742
Small town	5.9%	0.1%	-4.9%	453	-1.3%	-1.1%	-4.4%	2193	6.0%	7.1%	8.7%	3324
Countryside/ village	16.6%	21.3%	29.1%	456	-2.1%	2.2%	-2.8%	1834	-0.4%	5.2%	3.3%	2584
<b>AGE:</b>												
16-24	11.0%	-5.1%	-2.0%	197	1.3%	-1.9%	-7.3%	1122	5.3%	8.2%	6.4%	1710
25-34	-17.0%	-12.1%	-12.5%	360	-3.9%	-8.0%	-5.8%	1756	-0.4%	-5.9%	1.1%	2542
35-44	1.2%	-10.8%	-13.6%	476	-1.9%	-7.2%	-7.8%	2028	-6.4%	-6.5%	-5.8%	2799
45-54	3.2%	-0.2%	7.6%	364	-5.1%	-6.7%	2.0%	1705	4.3%	2.4%	11.0%	2487
55+	11.0%	5.9%	12.1%	631	3.0%	4.6%	7.4%	3151	3.0%	5.4%	10.4%	4632
<b>SEG:</b>												
AB	-0.9%	-10.4%	-8.6%	658	-0.2%	-2.3%	-0.1%	3353	2.1%	2.2%	6.4%	4803
C1	7.4%	-0.2%	-4.5%	624	0.5%	-1.5%	2.3%	2950	0.5%	3.2%	8.5%	4309
C2	3.4%	11.0%	18.4%	390	-3.3%	-3.3%	-7.2%	1742	0.2%	-1.7%	-1.7%	2528
DE	-7.5%	-10.8%	10.6%	354	-5.6%	-7.4%	-3.3%	1696	-1.2%	-4.2%	-0.3%	2502
<b>CHILDREN IN H/H:</b>												
Any	-2.3%	-7.1%	-12.3%	905	-1.6%	-7.9%	-6.8%	3571	-0.8%	-3.8%	-1.0%	5029
None	4.1%	-0.9%	7.0%	1126	-1.0%	-0.3%	1.7%	6195	1.6%	3.1%	7.4%	9146
<b>ACCOMMODATION:</b>												
Commercial accom	-3.9%	-11.5%	-4.3%	1268	-0.7%	-4.1%	-0.8%	6003	1.6%	-0.2%	4.9%	8320
- Serviced accom	2.2%	1.0%	5.4%	666	1.7%	1.1%	1.8%	4050	3.2%	4.2%	5.5%	5850
- Hotel/motel/guesthouse	3.2%	-2.0%	4.5%	581	2.9%	2.4%	3.0%	3623	3.7%	4.2%	5.6%	5247
- Bed & Breakfast	-8.4%	0.5%	-5.8%	73	-9.9%	-14.8%	-22.5%	399	-5.3%	-3.4%	-9.0%	561
Total self-catering rented	-4.4%	-13.5%	-11.1%	602	-3.0%	-7.8%	-3.9%	1870	-0.6%	-4.8%	4.3%	2305
- Camping & Caravanning (inc. owned caravans)	-4.6%	-15.2%	-6.4%	455								