

## GB TOURISM SURVEY - February 2013 SUMMARY OF RESULTS

### 1. Headlines

- In February 2013, there were 7.4 million domestic overnight trips in Great Britain, an 11% increase on the February 2012 figure (6.7 million).
- Nights and expenditure also increased when compared with the same period last year, rising from 14.9 million to 19.1 million for nights (up 29%) and from £1.1 billion to £1.4 billion for spend (up 24%).
- Looking at England alone, a similar picture emerged for trips, night and spend. There were 6.3 million trips in England in February 2013, a 10% increase from 5.7 million in 2012. Nights and spend also increased, by 24% and 26% respectively.
- Looking at the year-to-date data, the number of trips taken in Great Britain has remained flat against the same period last year (+1%), with nights and spend up (+7% and +9%).

### 2. Context

- Temperatures in February 2013 were below average, but not as cold as in recent years. There was a brief period of snow mid-month, with snow showers throughout the month.
- It is important to note that the number of trips taken in February 2012 was at an all-time low.

### 3. Trip Characteristics

- In the first 2 months of 2013, holiday trips remained flat when compared with the same period the year before (remaining at 4.3 million). This was largely driven by a decline in longer holidays (4+ nights), but an increase in shorter breaks (1-3 nights), which rose by 3%. However, bednights and expenditure saw decreases, falling by 4% and 7% respectively.
- Visits to friends and relatives were down by 2%, falling to 5.3 million; a result of a decline in leisure VFR (-10%). However, positively, nights and spend increased during this period, rising by 9% and 11% respectively – largely on account of strong increases in non-holiday VFR (+17% and +19% respectively).
- Business trips were the only trip purpose to see increases across trips, nights and spend, increasing by 6%, 18% and 31% respectively.
- In the first two months of the year, trips to the Seaside saw a decline (down 11% for trips and 13% for nights), with an increase in trips and nights spent in the countryside (+5% and +24% respectively).
- The number of trips taken by those with children saw an increase when compared to the same period last year, rising by 13%, whereas trips taken by households without children fell back by 4%.

### 4. Overseas Travel by UK Residents

- The number of trips abroad by UK residents in February decreased by 5% compared to the same time in 2012, with spend decreasing by 2%.

### 5. Other Tourism Surveys

- In February 2013 England room occupancy levels increased by 3 percentage points and bedspace occupancy by 2 percentage points when compared with the previous year.

## KEY MEASURES



### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>February '13</b>									
GB	6.7	7.4	+11%	14.9	19.1	+29%	1,117	1,390	+24%
England	5.7	6.3	+10%	12.4	15.5	+24%	918	1,157	+26%
<b>Jan-Feb '13</b>									
GB	13.0	13.1	+1%	29.5	31.7	+7%	2,134	2,330	+9%
England	11.1	11.1	0%	24.7	26.0	+5%	1,795	1,923	+7%

### Purpose of Trip – February 2013

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>GB</b>									
Holiday	2.4	2.5	+6%	5.4	5.8	+8%	481	489	+2%
Business	1.4	1.6	+19%	2.7	4.2	+58%	314	519	+65%
VFR	2.7	3.0	+11%	6.3	8.2	+30%	268	329	+23%
<b>England</b>									
Holiday	1.9	2.0	+7%	4.4	4.3	-2%	372	377	+1%
Business	1.2	1.4	+18%	2.3	3.5	+52%	276	443	+61%
VFR	2.4	2.6	+10%	5.3	6.8	+28%	220	286	+30%

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

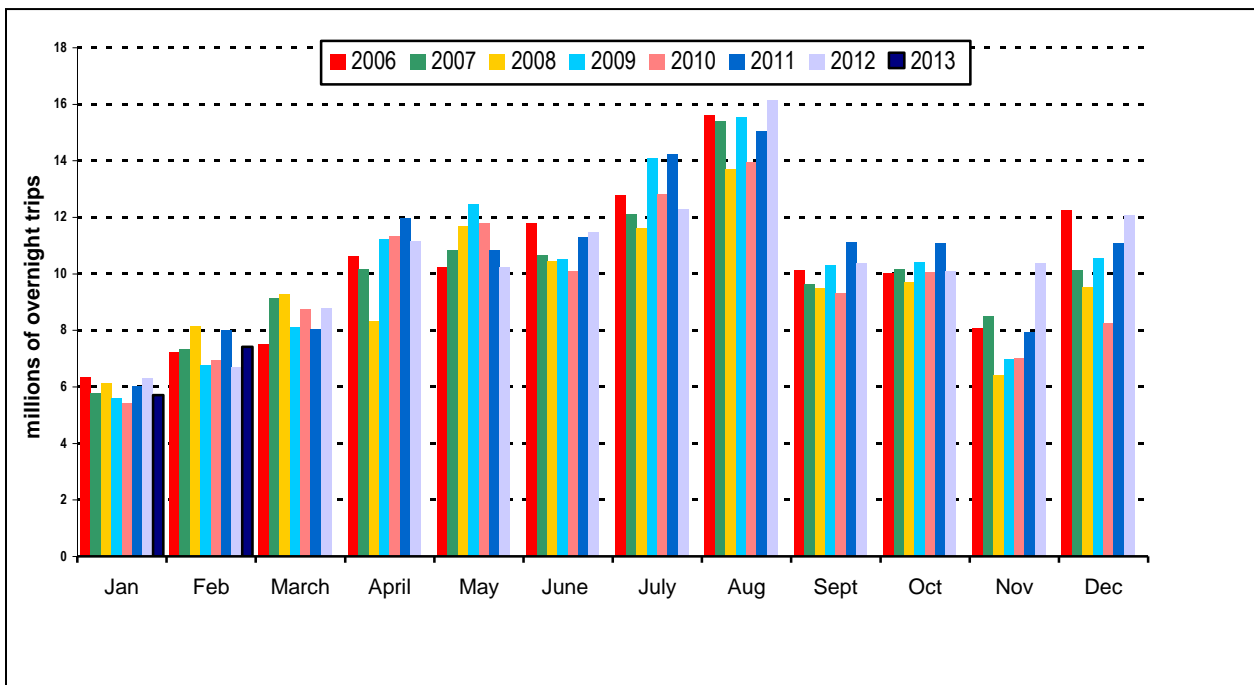
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>GB</b>									
Holiday	4.3	4.3	+1%	10.2	9.7	-4%	900	837	-7%
Business	2.8	3.0	+6%	6.0	7.1	+18%	633	827	+31%
VFR	5.4	5.3	-2%	12.4	13.5	+9%	511	569	+11%
<b>England</b>									
Holiday	3.4	3.5	+1%	8.1	7.4	-9%	717	646	-10%
Business	2.4	2.5	+4%	5.3	5.8	+11%	565	705	+25%
VFR	4.8	4.6	-3%	10.5	11.5	+10%	431	484	+12%

### Outbound Travel – UK Residents

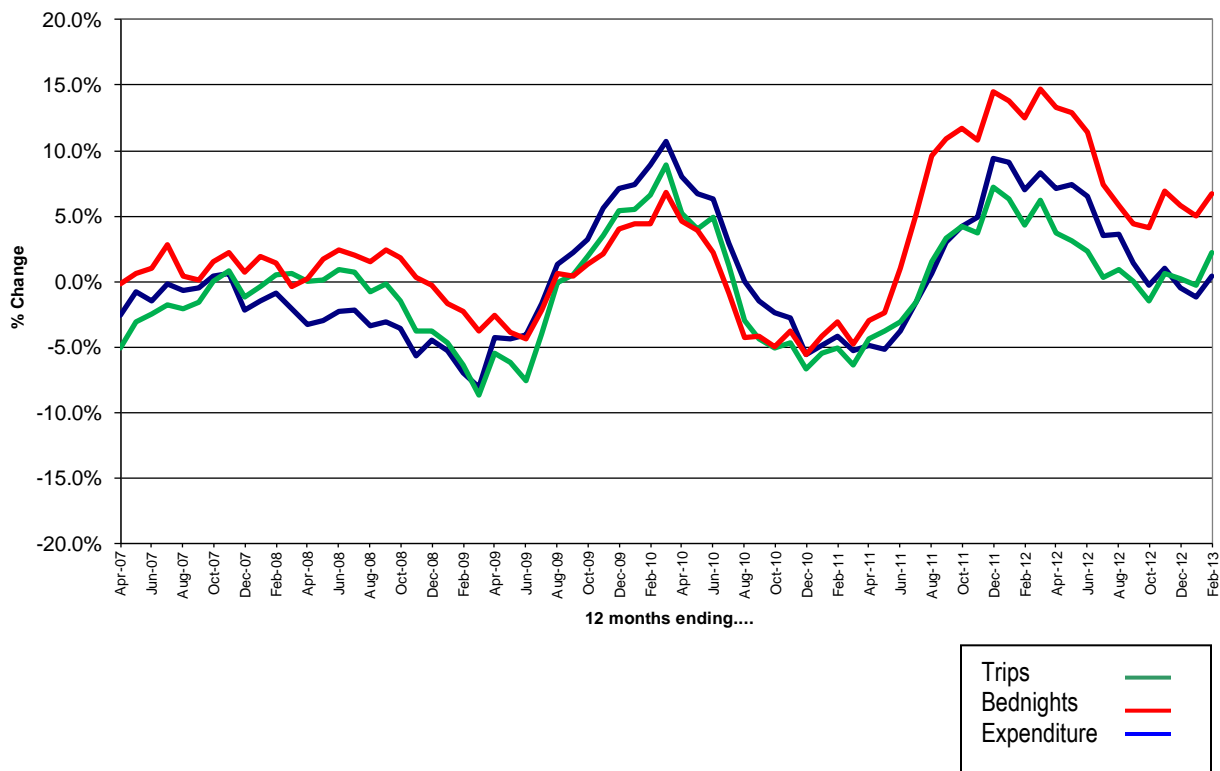
	TRIPS (MILLIONS)			SPEND (£BN)		
	2012	2013	% +/-	2012	2013	% +/-
February 2012	3.4	3.2	-5%	1.9	1.8	-2%
March '12 – Feb '13	56.8	56.6	0%	31.7	32.6	+3%

# 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 (February 2012 vs. February 2013)
- Year to date (February 2012 vs. February 2013)
- 12 month rolling (March 2011 - February 2012 vs. March 2012 - February 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.

