VisitEngland

GB TOURISM SURVEY - January 2013
SUMMARY OF RESULTS

1. Headlines

- In January 2013, there were 5.7 million domestic overnight trips in Great Britain, -9% fewer than in January 2012 (6.3 million).
- Nights (-14%) and expenditure (-8%) also decreased compared to the same time last year.
- A similar pattern was seen in England, where 4.8 million trips were taken in January, -12% less than in January 2012. The volume of bednights declined by -15%, and spend by -13%.

2. Context

- Temperatures in January 2013 were slightly below average in England, with a number of significant snowfalls in the second half of the month. This is in contrast to January 2012, which had temperatures 1.5 degrees above average and it was unusually dry.

3. Trip Characteristics

- Holiday trips decreased by -6% from January 2012 (1.9m) to January 2013 (1.8m), performing slightly better than for other trip purposes. However, holiday bednights (-18%) and expenditure (-17%) decreased at a greater rate than for all other purposes.
- The number of trips to visit friends and relatives (VFR) also decreased in January 2013 by 14% (from 2.7m to 2.3m). The volume of VFR nights also decreased (by -13%), while spend only decreased slightly, by -2% (243m to 239m).
- Business trips (-6%), nights (-14%) and spend (-3%) also decreased this month.

4. Overseas Travel by UK Residents

- The number of trips and the amount spent abroad by UK residents in January increased by 6% compared to the same time in 2012.

5. Other Tourism Surveys

- January results from the England Occupancy Survey showed room occupancy remained flat, while bedspace occupancy decreased slightly (by -1%).
- In the January Tourism Business Monitor, accommodation businesses reported a mixed performance over Christmas and the New Year, with similar numbers recording visitor increases as decreases, while visitor attractions were more likely to report an increase than a decrease over the holiday period.

KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
January '13									
GB	6.3	5.7	**-9%**	14.7	12.6	**-14%**	1017	940	**-8%**
England	5.4	4.8	**-12%**	12.3	10.5	**-15%**	877	766	**-13%**

Purpose of Trip – January 2013

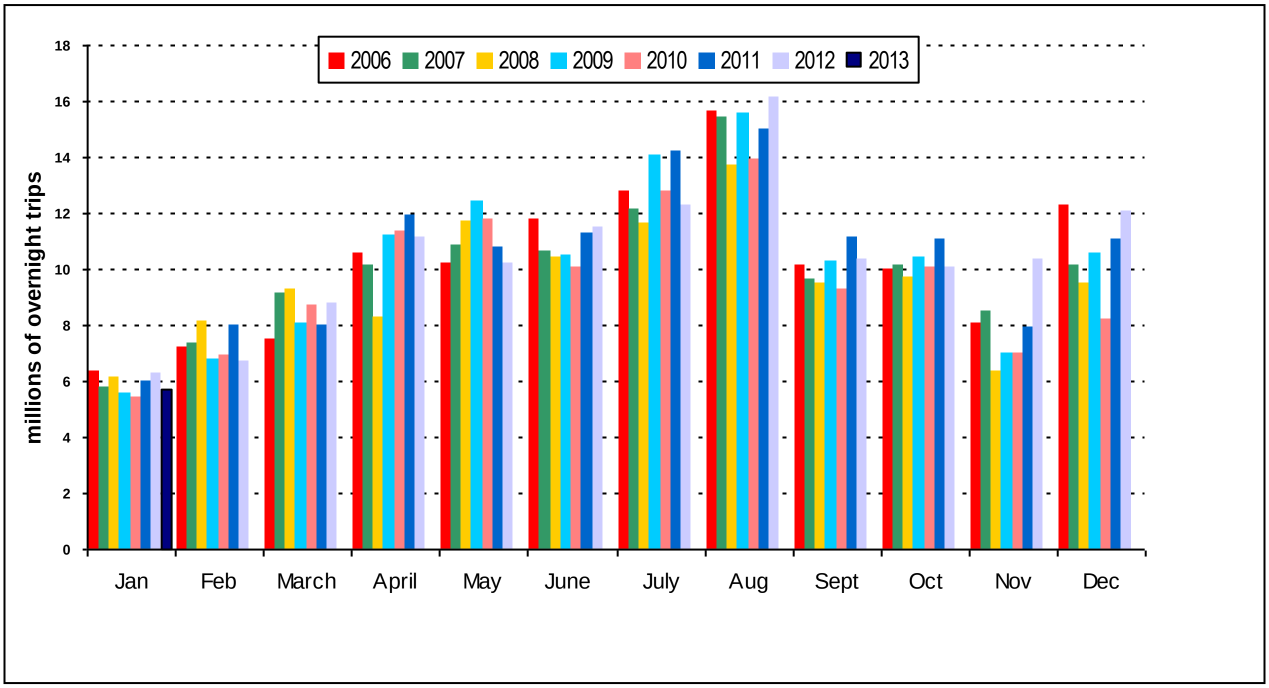
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	1.9	1.8	**-6%**	4.8	3.9	**-18%**	418	348	**-17%**
Business	1.4	1.3	**-6%**	3.3	2.8	**-14%**	319	308	**-3%**
VFR	2.7	2.3	**-14%**	6.1	5.3	**-13%**	243	239	**-2%**
England									
Holiday	1.5	1.4	**-7%**	3.7	3.1	**-18%**	345	269	**-22%**
Business	1.2	1.1	**-10%**	3.0	2.4	**-21%**	290	262	**-10%**
VFR	2.4	2.0	**-16%**	5.2	4.7	**-9%**	210	199	**-5%**

Outbound Travel – UK Residents

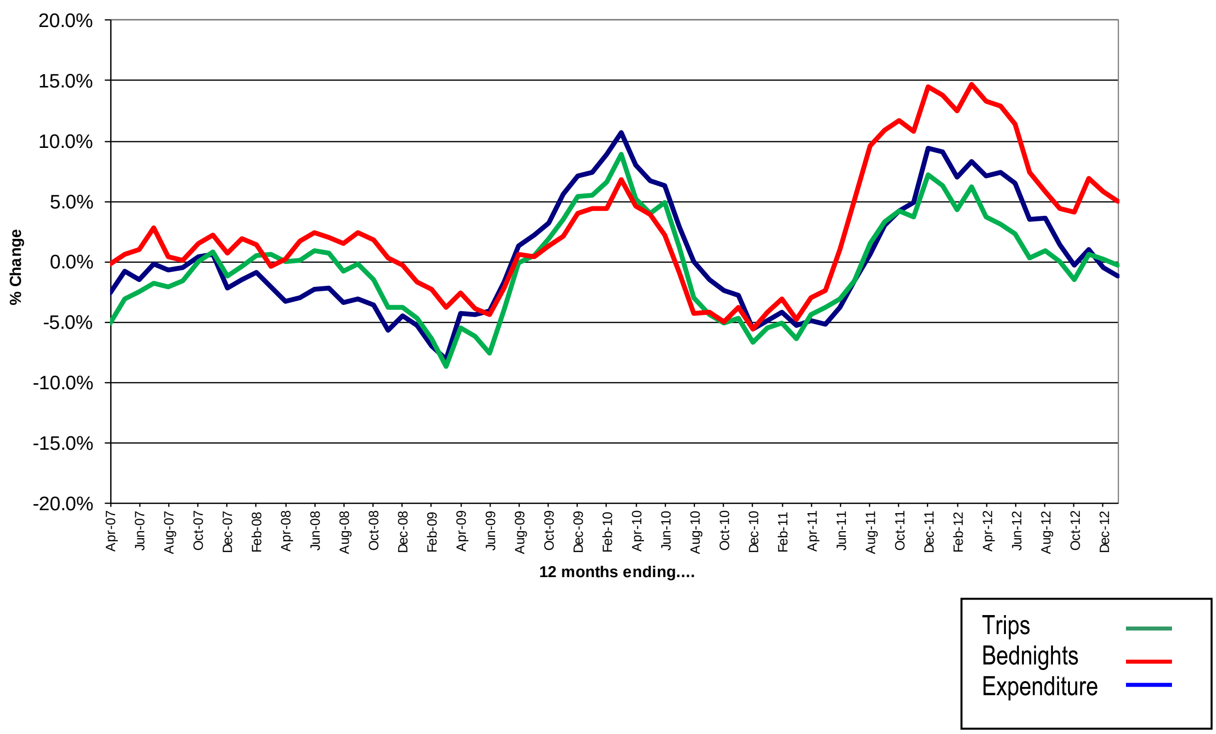
	TRIPS (MILLIONS)			SPEND (£BN)		
	2012	2013	% +/-	2012	2013	% +/-
January 2012	3.2	3.4	**+6%**	1.9	2.0	**+6%**
Feb '12 – Jan '13	56.6	56.8	**0%**	31.6	32.7	**+3%**

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

LEGEND: Above Average Performance | Average Performance | Below Average Performance

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: January 2013			Unweighted	YTD: January - January 2013			Unweighted	12 month rolling February 2012 - January 2013			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	-9.4%	-14.3%	-7.6%	743	-9.4%	-14.3%	-7.6%	743	-1.2%	-0.3%	5.0%	17390
PURPOSE:												
Pure Holiday	-6.4%	-18.3%	-16.7%	243	-6.4%	-18.3%	-16.7%	243	-1.9%	-3.4%	4.6%	8369
- 1-3 nights holiday	-0.1%	-1.8%	-3.0%	200	-0.1%	-1.8%	-3.0%	200	0.2%	-0.4%	9.6%	5171
- 4+ nights holiday	-30.7%	-39.0%	-52.6%	43	-30.7%	-39.0%	-52.6%	43	-5.6%	-4.9%	-0.4%	3198
VFR (on holiday)	-20.1%	-11.7%	-2.5%	156	-20.1%	-11.7%	-2.5%	156	5.4%	8.6%	12.2%	3633
HOLIDAY (TOTAL)	-12.0%	-15.8%	-13.7%	399	-12.0%	-15.8%	-13.7%	399	0.2%	-0.3%	5.9%	12002
VFR (non-holiday)	-8.6%	-13.5%	0.0%	160	-8.6%	-13.5%	0.0%	160	-9.6%	-6.7%	1.9%	2787
VFR (TOTAL)	-14.3%	-12.6%	-1.6%	316	-14.3%	-12.6%	-1.6%	316	-1.7%	2.2%	7.7%	6420
Business	-6.3%	-14.0%	-3.4%	149	-6.3%	-14.0%	-3.4%	149	0.7%	4.1%	1.2%	2066
Regions:												
West Midlands	-11.9%	5.4%	0.0%	51	-11.9%	5.4%	0.0%	51	2.0%	6.3%	10.4%	1130
East of England	-28.3%	-4.0%	-40.2%	49	-28.3%	-4.0%	-40.2%	49	-5.3%	1.5%	7.2%	1363
East Midlands	-21.8%	-25.1%	-42.0%	44	-21.8%	-25.1%	-42.0%	44	-6.2%	-5.0%	-0.6%	1145
London	-7.8%	-29.6%	-13.0%	97	-7.8%	-29.6%	-13.0%	97	7.9%	-0.8%	14.4%	1573
North West	-12.3%	-19.8%	-10.3%	90	-12.3%	-19.8%	-10.3%	90	0.4%	1.6%	3.8%	1984
North East	-22.3%	-2.0%	35.7%	29	-22.3%	-2.0%	35.7%	29	-3.8%	-7.5%	8.9%	585
South East	-10.1%	-26.6%	-26.0%	110	-10.1%	-26.6%	-26.0%	110	4.7%	0.7%	11.0%	2442
South West	-14.5%	-11.1%	7.6%	80	-14.5%	-11.1%	7.6%	80	-2.7%	0.6%	4.3%	2833
Yorkshire & the Humber	8.7%	13.3%	2.5%	75	8.7%	13.3%	2.5%	75	-2.4%	4.0%	8.1%	1565
LOCATION TYPE:												
Seaside	-15.8%	-22.3%	-12.1%	78	-15.8%	-22.3%	-12.1%	78	-2.8%	-2.9%	4.4%	3734
Large city/ large town	-10.5%	-13.8%	-6.4%	385	-10.5%	-13.8%	-6.4%	385	-0.5%	2.4%	5.5%	6670
Small town	-5.9%	-21.0%	-6.7%	176	-5.9%	-21.0%	-6.7%	176	3.3%	1.4%	8.3%	4168
Countryside/ village	-8.9%	5.0%	-3.8%	112	-8.9%	5.0%	-3.8%	112	-3.6%	-2.5%	1.5%	3278
AGE:												
16-24	-8.9%	-29.9%	-1.7%	109	-8.9%	-29.9%	-1.7%	109	-4.5%	2.6%	6.4%	2012
25-34	10.3%	25.1%	24.4%	124	10.3%	25.1%	24.4%	124	7.9%	7.6%	19.4%	3117
35-44	-29.4%	-22.8%	-24.1%	135	-29.4%	-22.8%	-24.1%	135	-15.2%	-9.1%	-10.4%	3539
45-54	-2.2%	-23.9%	-16.8%	150	-2.2%	-23.9%	-16.8%	150	10.7%	4.6%	12.5%	3211
55+	-9.6%	-8.8%	-3.0%	226	-9.6%	-8.8%	-3.0%	226	-0.9%	-1.3%	4.7%	5510
SEG:												
AB	-12.1%	-15.8%	-11.4%	240	-12.1%	-15.8%	-11.4%	240	0.9%	4.2%	8.2%	5775
C1	-4.9%	-10.0%	10.9%	225	-4.9%	-10.0%	10.9%	225	-4.6%	-1.7%	0.7%	5298
C2	-13.1%	-13.2%	-20.9%	142	-13.1%	-13.2%	-20.9%	142	1.8%	-1.2%	4.4%	3141
DE	-6.9%	-20.7%	-16.2%	136	-6.9%	-20.7%	-16.2%	136	-2.6%	-6.3%	6.2%	3175
CHILDREN IN H/H:												
Any	-10.6%	-18.9%	-8.1%	229	-10.6%	-18.9%	-8.1%	229	-2.0%	0.5%	5.5%	6287
None	-9.0%	-12.6%	-7.4%	514	-9.0%	-12.6%	-7.4%	514	-0.8%	-0.6%	4.8%	11104
ACCOMMODATION:												
Commercial accom	-4.4%	-15.3%	-6.3%	422	-4.4%	-15.3%	-6.3%	422	1.5%	-0.7%	5.8%	10373
- Serviced accom	-2.5%	-15.0%	-3.2%	374	-2.5%	-15.0%	-3.2%	374	3.3%	3.8%	7.0%	7058
- Hotel/motel/guesthouse	-2.5%	-9.5%	0.3%	341	-2.5%	-9.5%	0.3%	341	3.0%	3.6%	6.7%	6272
- Bed & Breakfast	0.0%	-40.7%	-28.6%	31	0.0%	-40.7%	-28.6%	31	8.0%	6.5%	14.1%	739
Total self-catering rented	3.7%	-6.2%	-18.9%	40	3.7%	-6.2%	-18.9%	40	-2.7%	-5.9%	1.3%	3043
-Camping & Caravanning (inc. owned caravans)	28.3%	25.8%	75.0%	8	28.3%	25.8%	75.0%	8	-5.7%	-2.6%	-1.1%	2207
-Other self-catering rented	5.4%	-3.1%	-22.5%	36	5.4%	-3.1%	-22.5%	36	2.0%	-5.7%	3.0%	1301
Hostels	-77.0%	-82.2%	-92.9%	2	-77.0%	-82.2%	-92.9%	2	16.4%	9.3%	48.9%	200
Own home/friends'/relatives'	-14.2%	-12.0%	-12.0%	312	-14.2%	-12.0%	-12.0%	312	-4.4%	0.5%	0.6%	6843

Comparisons with equivalent periods, 2012

England

	Month: January 2013			Unweighted	YTD: January - January 2013			Unweighted	12 month rolling February 2012 - January 2013			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	-11.5%	-14.6%	-12.7%	622	-11.5%	-14.6%	-12.7%	622	-0.7%	0.6%	7.5%	14396
PURPOSE:												
Pure Holiday	-6.5%	-17.6%	-22.0%	192	-6.5%	-17.6%	-22.0%	192	-0.9%	-1.9%	8.1%	6671
- 1-3 nights holiday	-1.2%	-3.5%	-11.2%	157	-1.2%	-3.5%	-11.2%	157	0.3%	-1.1%	11.0%	4181
- 4+ nights holiday	-27.2%	-35.7%	-50.5%	35	-27.2%	-35.7%	-50.5%	35	-3.0%	-2.3%	5.0%	2482
VFR (on holiday)	-22.8%	-17.2%	-12.5%	139	-22.8%	-17.2%	-12.5%	139	2.9%	4.9%	10.5%	3058
HOLIDAY (TOTAL)	-13.8%	-17.4%	-19.7%	330	-13.8%	-17.4%	-19.7%	330	0.3%	0.0%	8.5%	9730
VFR (non-holiday)	-9.6%	-0.3%	3.1%	136	-9.6%	-0.3%	3.1%	136	-7.2%	-3.5%	2.9%	2468
VFR (TOTAL)	-16.4%	-9.3%	-5.2%	274	-16.4%	-9.3%	-5.2%	274	-1.9%	1.4%	7.2%	5527
Business	-9.7%	-20.5%	-9.7%	128	-9.7%	-20.5%	-9.7%	128	0.6%	5.5%	3.5%	1729
Regions:												
West Midlands	-11.9%	5.4%	0.0%	51	-11.9%	5.4%	0.0%	51	2.0%	6.3%	10.4%	1130
East of England	-28.3%	-4.0%	-40.2%	49	-28.3%	-4.0%	-40.2%	49	-5.3%	1.5%	7.2%	1363
East Midlands	-21.8%	-25.1%	-42.0%	44	-21.8%	-25.1%	-42.0%	44	-6.2%	-5.0%	-0.6%	1145
London	-7.8%	-29.6%	-13.0%	97	-7.8%	-29.6%	-13.0%	97	7.9%	-0.8%	14.4%	1573
North West	-12.3%	-19.8%	-10.3%	90	-12.3%	-19.8%	-10.3%	90	0.4%	1.6%	3.8%	1984
North East	-22.3%	-2.0%	35.7%	29	-22.3%	-2.0%	35.7%	29	-3.8%	-7.5%	8.9%	585
South East	-10.1%	-26.6%	-26.0%	110	-10.1%	-26.6%	-26.0%	110	4.7%	0.7%	11.0%	2442
South West	-14.5%	-11.1%	7.6%	80	-14.5%	-11.1%	7.6%	80	-2.7%	0.6%	4.3%	2833
Yorkshire & the Humber	8.7%	13.3%	2.5%	75	8.7%	13.3%	2.5%	75	-2.4%	4.0%	8.1%	1565
LOCATION TYPE:												
Seaside	-4.7%	-15.5%	-1.1%	70	-4.7%	-15.5%	-1.1%	70	-2.2%	0.4%	7.7%	3017
Large city/ large town	-11.5%	-14.5%	-8.4%	332	-11.5%	-14.5%	-8.4%	332	-0.4%	2.3%	5.6%	5735
Small town	-7.9%	-19.1%	-18.5%	143	-7.9%	-19.1%	-18.5%	143	4.8%	1.8%	11.8%	3361
Countryside/ village	-21.2%	-4.7%	-24.8%	83	-21.2%	-4.7%	-24.8%	83	-3.7%	-2.7%	7.8%	2626
AGE:												
16-24	-14.4%	-36.0%	-13.2%	93	-14.4%	-36.0%	-13.2%	93	-3.4%	4.4%	10.8%	1718
25-34	3.0%	14.9%	22.0%	99	3.0%	14.9%	22.0%	99	10.0%	9.7%	20.4%	2616
35-44	-29.4%	-20.0%	-23.3%	110	-29.4%	-20.0%	-23.3%	110	-13.7%	-8.6%	-3.6%	2950
45-54	-3.8%	-23.9%	-15.5%	130	-3.8%	-23.9%	-15.5%	130	10.1%	8.0%	14.6%	2624
55+	-9.8%	-4.1%	-18.9%	192	-9.8%	-4.1%	-18.9%	192	-1.6%	-2.3%	3.9%	4488
SEG:												
AB	-11.5%	-11.4%	-15.7%	206	-11.5%	-11.4%	-15.7%	206	1.3%	4.7%	11.1%	4819
C1	-10.9%	-14.4%	5.6%	192	-10.9%	-14.4%	5.6%	192	-4.7%	-1.7%	2.7%	4408
C2	-22.3%	-27.8%	-35.7%	104	-22.3%	-27.8%	-35.7%	104	0.8%	-1.0%	6.2%	2525
DE	3.0%	-4.9%	-10.2%	118	3.0%	-4.9%	-10.2%	118	1.9%	-1.9%	9.8%	2636
CHILDREN IN H/H:												
Any	-11.1%	-18.6%	-3.7%	195	-11.1%	-18.6%	-3.7%	195	-0.1%	2.4%	10.0%	5247
None	-11.7%	-13.2%	-15.6%	428	-11.7%	-13.2%	-15.6%	428	-0.9%	-0.2%	6.5%	9158
ACCOMMODATION:												
Commercial accom	-4.0%	-12.2%	-10.6%	353	-4.0%	-12.2%	-10.6%	353	2.6%	1.9%	8.4%	8476
- Serviced accom	-2.4%	-13.5%	-9.5%	316	-2.4%	-13.5%	-9.5%	316	3.7%	4.0%	7.9%	5866
- Hotel/motel/guesthouse	-3.1%	-9.2%	-6.9%	287	-3.1%	-9.2%	-6.9%	287	3.2%	3.3%	6.7%	5219
- Bed & Breakfast	14.4%	-28.8%	-27.5%	28	14.4%	-28.8%	-27.5%	28	11.8%	14.3%	23.2%	616
Total self-catering rented	23.4%	19.5%	0.0%	33	23.4%	19.5%	0.0%	33	0.5%	-0.9%	7.9%	2402
-Camping & Caravanning (inc. owned caravans)	64.5%	52.5%	200.0%	7	64.5%	52.5%	200.0%	7	-5.4%	-2.1%	1.6%	1692
-Other self-catering rented	19.9%	22.4%	-8.0%	28	19.9%	22.4%	-8.0%	28	9.2%	0.8%	12.5%	1019
Hostels	-100.0%	-100.0%	-100.0%	0	-100.0%	-100.0%	-100.0%	0	1.6%	7.9%	52.0%	135
Own home/friends'/relatives'	-16.5%	-13.3%	-17.3%	269	-16.5%	-13.3%	-17.3%	269	-4.4%	-0.8%	2.6%	5768