

## GB TOURISM SURVEY - June 2013 SUMMARY OF RESULTS

### 1. Headlines

- In June 2013, there were 11.0 million domestic overnight trips in Great Britain, a decrease of 4% on the June 2012 figure of 11.5 million.
- Both nights and spend also saw decreases, with nights falling by 9% to 32.7 million and spend falling by 3% to £2.3 billion.
- Looking at England alone, there were declines in trips, nights and spend for the month of June, with the number of trips falling by 5%, nights by 10% and spend by 3%.
- Looking at the year-to-date data, the number of trips taken in Great Britain has declined slightly against the same period last year (-3%), with nights down 4% and spend broadly flat (-1%).

### 2. Context

- The second May bank holiday took place in June last year for the Jubilee, which affects the comparison of June 2013 with June 2012. This may have resulted in fewer trips being taken in June this year. Taking May and June together the trip volume was slightly higher in 2013 than in 2012 (22.2 million versus 21.7 million).
- The weather in June 2013 was warmer than in the last 2 years, but barely above the seasonal average. There was also a below average amount of rain.

### 3. Trip Characteristics

- Looking at the year to date, holiday trips were down 4%, to 23.6 million, with nights and spend also down on the same period last year (by 4% and 3% respectively). The decline in trips continues to be driven by declines in 4+ night holidays, which are down 7%.
- Visits to friends and relatives remained flat, with nights down 2%. However, positively, spend was up by 7% during this period, largely driven by an increase in expenditure in leisure VFR (up 12%).
- Business trips are down, with both nights and spend also down (by -8%, -10% and -6% respectively).
- Trips to the seaside have declined most sharply so far this year (down -10% for trips and -6% for spend), whereas trips to large cities/towns fared better (flat for trips and +3% for spend) – the only destination type not to see a decline in trips.
- Trips involving a stay in a camp site or caravan are down 10% against the same period last year, with spend also down 17%. Overnight stays in serviced accommodation are flat for both trips and spend.

### 4. Overseas Travel by UK Resident

- The number of trips taken abroad by UK residents in June decreased by 2% against the same month last year, with spend up 3%. Looking at the year-to-date, trips have remained flat (+1%), with spend up 3%.

### 5. Other Tourism Surveys

- In June 2013 England room occupancy increased by 2% when compared with the previous year, with bedspace Occupancy remaining flat.

## KEY MEASURES



### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>June '13</b>									
GB	11.5	11.0	-4%	35.9	32.7	-9%	2,330	2,268	-3%
England	9.5	9.1	-5%	28.5	25.8	-10%	1,881	1,823	-3%
<b>Jan-June'13</b>									
GB	54.7	53.1	-3%	151.4	146.0	-4%	9,977	9,858	-1%
England	45.4	44.0	-3%	121.9	116.4	-5%	8,102	7,998	-1%

### Purpose of Trip – June 2013

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>GB</b>									
Holiday	6.0	5.7	-5%	22.2	20.0	-10%	1,495	1,491	0%
Business	1.7	1.5	-14%	4.3	2.7	-37%	423	339	-20%
VFR	3.6	3.5	-3%	8.7	8.8	+2%	380	380	0%
<b>England</b>									
Holiday	4.7	4.5	-5%	16.8	14.9	-12%	1,169	1,166	0%
Business	1.5	1.2	-17%	3.6	2.4	-35%	366	283	-23%
VFR	3.1	3.0	-3%	7.5	7.5	0%	320	325	+2%

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

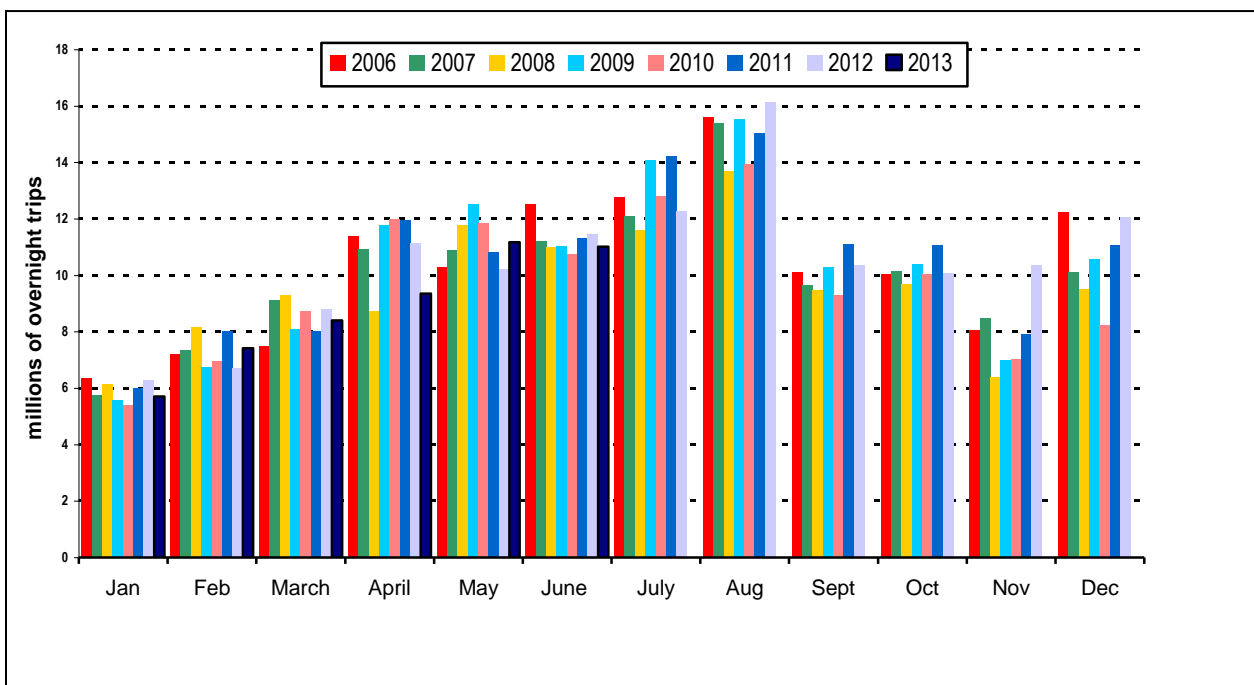
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>GB</b>									
Holiday	24.6	23.6	-4%	76.9	73.6	-4%	5,432	5,263	-3%
Business	9.4	8.7	-8%	21.5	19.5	-10%	2,323	2,190	-6%
VFR	18.7	18.6	0%	48.3	47.5	-2%	1,944	2,073	+7%
<b>England</b>									
Holiday	19.4	18.7	-4%	59.0	55.7	-6%	4,314	4,104	-5%
Business	7.9	7.4	-6%	18.1	15.8	-13%	1,928	1,840	-5%
VFR	16.3	16.0	-2%	40.9	40.1	-2%	1,631	1,761	+8%

### Outbound Travel – UK Residents

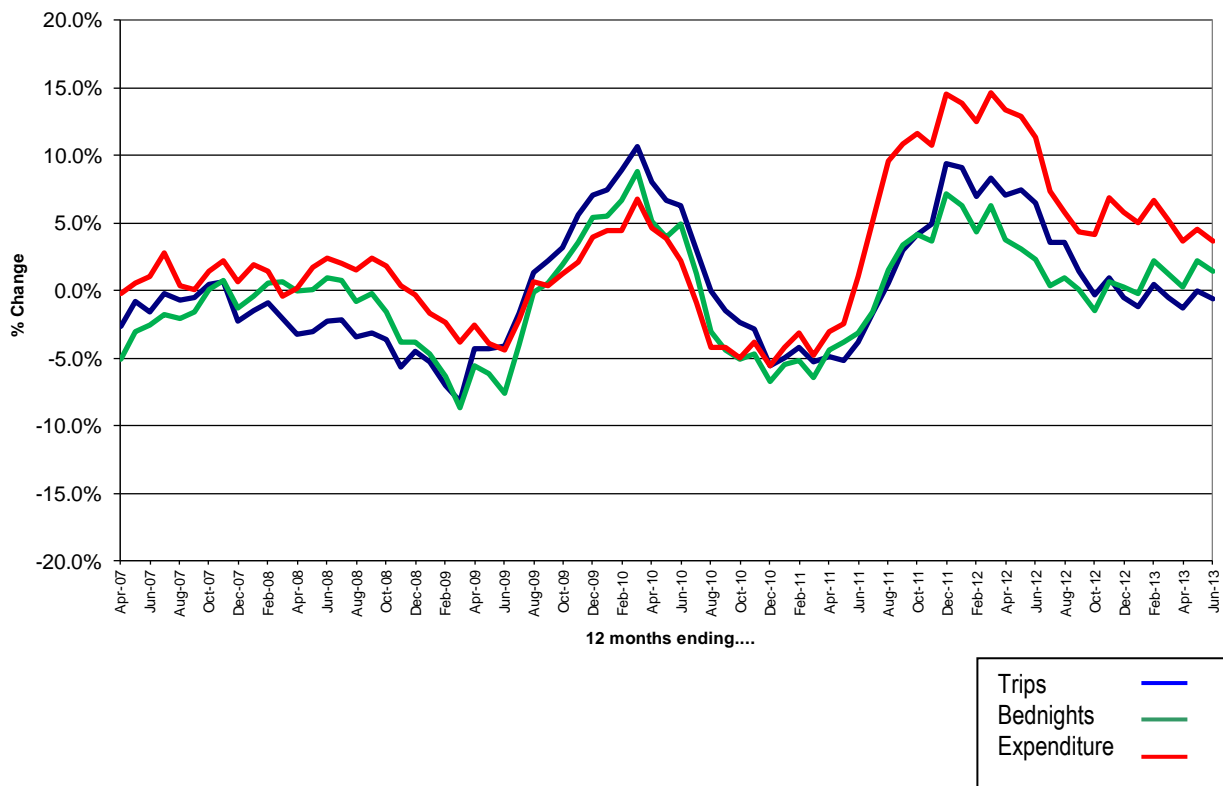
	TRIPS (MILLIONS)			SPEND (£BN)		
	2012	2013	% +/-	2012	2013	% +/-
<b>June 2013</b>	6.0	5.9	-2%	3.3	3.4	+3%
<b>July '12– June '13</b>	56.7	56.7	0%	32.1	33.1	+3%

# 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 (June 2012 vs. June 2013)
- Year to date (Jan-June 2012 vs. Jan-June 2013)
- 12 month rolling (July 2011 – June 2012 vs. July 2012 - June 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.

