

## GB TOURISM SURVEY - March 2013

### SUMMARY OF RESULTS

#### 1. Headlines

- In March 2013, there were 8.4 million domestic overnight trips in Great Britain, a decrease of 4% on the March 2012 figure of 8.8 million.
- Nights remained flat, whilst expenditure was down against with the same period last year (-1% and -5% respectively).
- Looking at England alone, the declines were steeper for trips, night and spend. There were 7.0 million trips in England in March 2013, a 7% decrease from 7.5 million in 2012. Nights and spend also decreased, by 8% and 6% 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 (+4% and +3%).

#### 2. Context

- March 2013 was the coldest on record since 1962 and heavy snow affected much of the UK, causing widespread travel problems, whereas March 2012 was the warmest since 1957.
- Easter also fell at the end of March in 2013, earlier than the usual month of April, which makes comparisons for the months of March and April difficult.

#### 3. Trip Characteristics

- Looking at the year to date, holiday trips remained flat when compared with the same period the year before (at 7.9 million). Bednights saw an increase of 3%, which appears to be fuelled by an increase in longer breaks (4+ nights), which accounted for 8% more holiday bednights this year than last. However, this has not led to greater spend, which has declined by 3%.
- Visits to friends and relatives remained flat, at 8.5 million, as did nights at 22.1 million (-1% and +1% respectively). However, positively, spend increased by 10% during this period, largely driven by an increase in expenditure in leisure VFR (up 12%).
- Business trips declined slightly (by -2%), with both nights and spend increasing by 7%.
- In the first three months of the year, trips to the countryside have increased (up 4%), but during this period trips to the seaside have declined (by 5%). However, positively spend is up by 6%, suggesting that the poor weather may have encouraged people to spend more on entertainment.
- There has been some variation in trips across the country, with London, the North East and Yorkshire performing well. However, the South East, East Midlands and the East of England have seen declines in trips, nights and spend.

#### 4. Overseas Travel by UK Residents

- The number of trips abroad by UK residents in March decreased by 4% compared to the same period in 2012, with spend remaining flat.

#### 5. Other Tourism Surveys

- In March 2013 England room and bed occupancy levels increased by 1 percentage point when compared with the previous year.
- The Easter Tourism Business Monitor, which collects results from January until the end of the Easter holidays for attractions and accommodation businesses, suggested that around half of businesses had seen a reduction in visitor numbers in the year to April. However, levels of confidence had increased slightly since the start of the year.

## KEY MEASURES



### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>March '13</b>									
GB	8.8	8.4	-4%	24.3	24.2	-1%	1,524	1,451	-5%
England	7.5	7.0	-7%	20.3	18.7	-8%	1,264	1,194	-6%
<b>Jan-March '13</b>									
GB	21.8	21.5	-1%	53.9	55.9	+4%	3,657	3,781	+3%
England	18.6	18.0	-3%	45.0	44.7	-1%	3,059	3,116	+2%

### Purpose of Trip – March 2013

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>GB</b>									
Holiday	3.7	3.6	-3%	10.6	11.7	+10%	748	761	+2%
Business	1.5	1.2	-18%	3.3	2.9	-13%	385	261	-32%
VFR	3.2	3.2	0%	9.5	8.6	-9%	336	360	+7%
<b>England</b>									
Holiday	3.0	2.8	-8%	8.4	8.2	-2%	622	602	-3%
Business	1.3	1.1	-15%	2.7	2.3	-14%	300	222	-26%
VFR	2.9	2.7	-4%	8.4	7.1	-15%	300	305	+2%

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

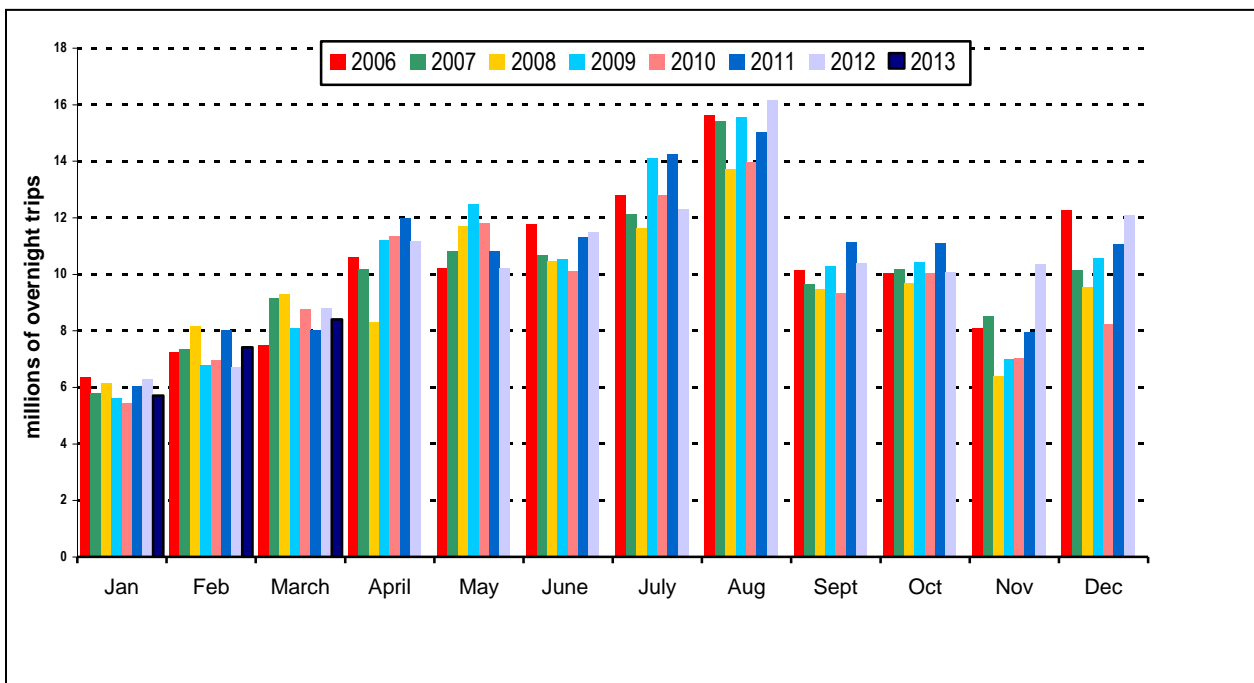
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>GB</b>									
Holiday	8.0	7.9	-1%	20.8	21.4	+3%	1,647	1,598	-3%
Business	4.3	4.2	-2%	9.2	9.9	+7%	1,018	1,088	+7%
VFR	8.6	8.5	-1%	21.9	22.1	+1%	846	929	+10%
<b>England</b>									
Holiday	6.4	6.2	-3%	16.5	15.6	-6%	1,339	1,248	-7%
Business	3.7	3.6	-3%	7.9	8.2	+3%	866	927	+7%
VFR	7.6	7.3	-4%	18.9	18.6	-1%	731	789	+8%

### Outbound Travel – UK Residents

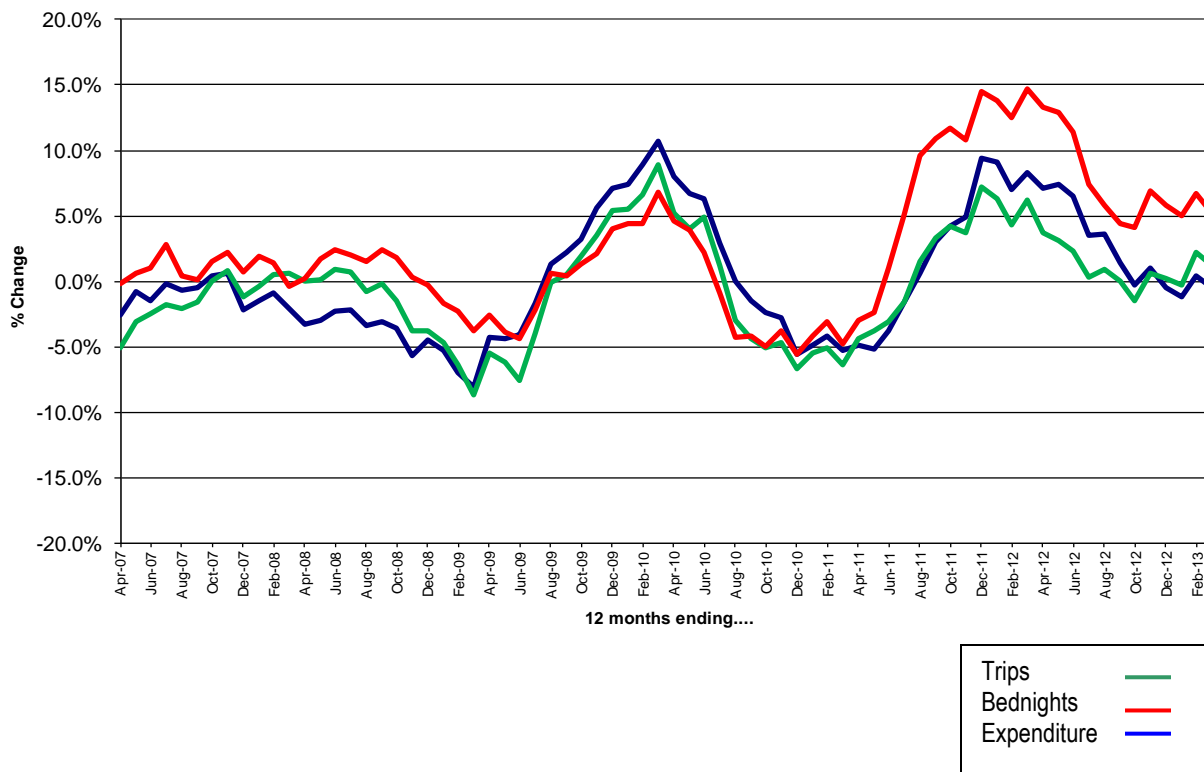
	TRIPS (MILLIONS)			SPEND (£BN)		
	2012	2013	% +/-	2012	2013	% +/-
March 2012	3.6	3.5	-4%	2.2	2.1	-1%
April '12– March '13	56.8	56.4	-1%	31.7	32.5	+3%

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

