

GB TOURISM SURVEY - May 2013

SUMMARY OF RESULTS

1. Headlines

- In May 2013, there were 11.2 million domestic overnight trips in Great Britain, an increase of 9% on the May 2012 figure of 10.2 million.
- Both nights and spend also saw increases, with nights up from 28.8 to 31.9 million (+11%) and spend up from £1.9 to £2.0 billion (+6%).
- Looking at England alone, trips and nights volumes were a couple of percentage points higher than the GB average (+11% and +13% respectively), with spend on a par (+6%).
- 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 and spend broadly flat (by -2% and -1% respectively).

2. Context

- The second May bank holiday actually took place in June last year for the Jubilee, which affects the comparison of May 2012 with May 2013. This may have resulted in fewer trips being taken in May 2012.
- May 2013 was a cold month, with rainfall above average, rounding off one of the coldest springs of the last century.

3. Trip Characteristics

- Looking at the year to date, holiday trips were down 4%, to 17.9 million, with nights and spend also down on the same period last year (by 2% and 4% respectively). The decline in trips is being driven largely by declines in 4+ night holidays, which are down 7%, with a decline in spend exacerbated by people spending less on shorter holidays (1-3 nights), with spend down 6% on these breaks.
- Visits to friends and relatives remained flat, with nights down 2%. However, positively, spend is up by 8% during this period, largely driven by an increase in expenditure in leisure VFR (up 5% for trips and 15% for expenditure).
- Business trips are down, with both nights and spend also down (by -6%, -3% and -3% respectively).
- Trips to the seaside have declined most sharply so far this year (down -8%, for trips and -6% for spend), whereas trips to large cities/towns fared better (+1% for trips and +1% for spend) – the only destination type not to see a decline in trips.
- Trip declines were greater amongst social class C2, with trips down 8%, and nights and spend down 10%. There were also regional variations, with the largest declines in trips to the South East, South West and Yorkshire. Meanwhile, London, the North East and the West Midlands have seen increases in trips in the first five months of the year.

4. Overseas Travel by UK Resident

- The number of trips taken abroad by UK residents in May increased by 7% against the same month last year, with spend up 14%. Looking at the year-to-date, trips have remained flat (+1%), with spend up 4%.

5. Other Tourism Surveys

- In May 2013 England room occupancy increased by 2 percentage points when compared with the previous year, with bedspace occupancy up by 4 percentage points.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
May '13									
GB	10.2	11.2	+9%	28.8	31.9	+11%	1,898	2,008	+6%
England	8.2	9.1	+11%	22.6	25.4	+13%	1,494	1,590	+6%
Jan-May '13									
GB	43.2	42.1	-3%	115.5	113.4	-2%	7,647	7,590	-1%
England	35.9	35.0	-3%	93.4	90.6	-3%	6,221	6,175	-1%

Purpose of Trip – May 2013

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	4.9	5.7	+16%	16.0	19.0	+19%	1,059	1,229	+16%
Business	1.8	1.4	-26%	4.1	2.8	-30%	457	321	-30%
VFR	3.1	3.7	+19%	8.0	9.1	+14%	335	410	+22%
England									
Holiday	3.8	4.5	+19%	12.1	14.6	+21%	827	927	+12%
Business	1.5	1.2	-20%	3.2	2.3	-30%	354	268	-24%
VFR	2.7	3.1	+16%	6.7	7.6	+15%	279	352	+26%

Purpose of Trip – Year to Date (January – May 2013)

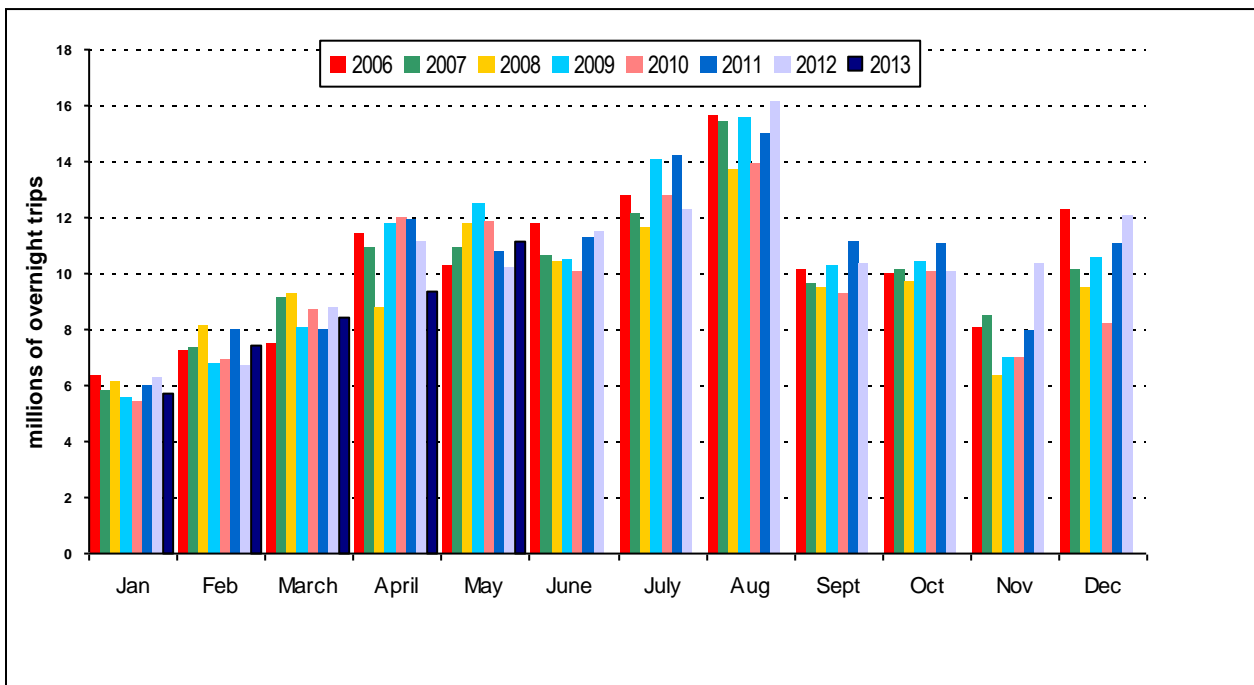
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	18.6	17.9	-4%	54.7	53.7	-2%	3,937	3,773	-4%
Business	7.7	7.2	-6%	17.2	16.7	-3%	1,900	1,851	-3%
VFR	15.2	15.2	0%	39.7	38.7	-2%	1,564	1,693	+8%
England									
Holiday	14.7	14.2	-3%	42.2	40.9	-3%	3,145	2,938	-7%
Business	6.5	6.2	-4%	14.5	13.4	-7%	1,562	1,556	0%
VFR	13.2	13.0	-1%	33.4	32.6	-3%	1,311	1,436	+10%

Outbound Travel – UK Residents

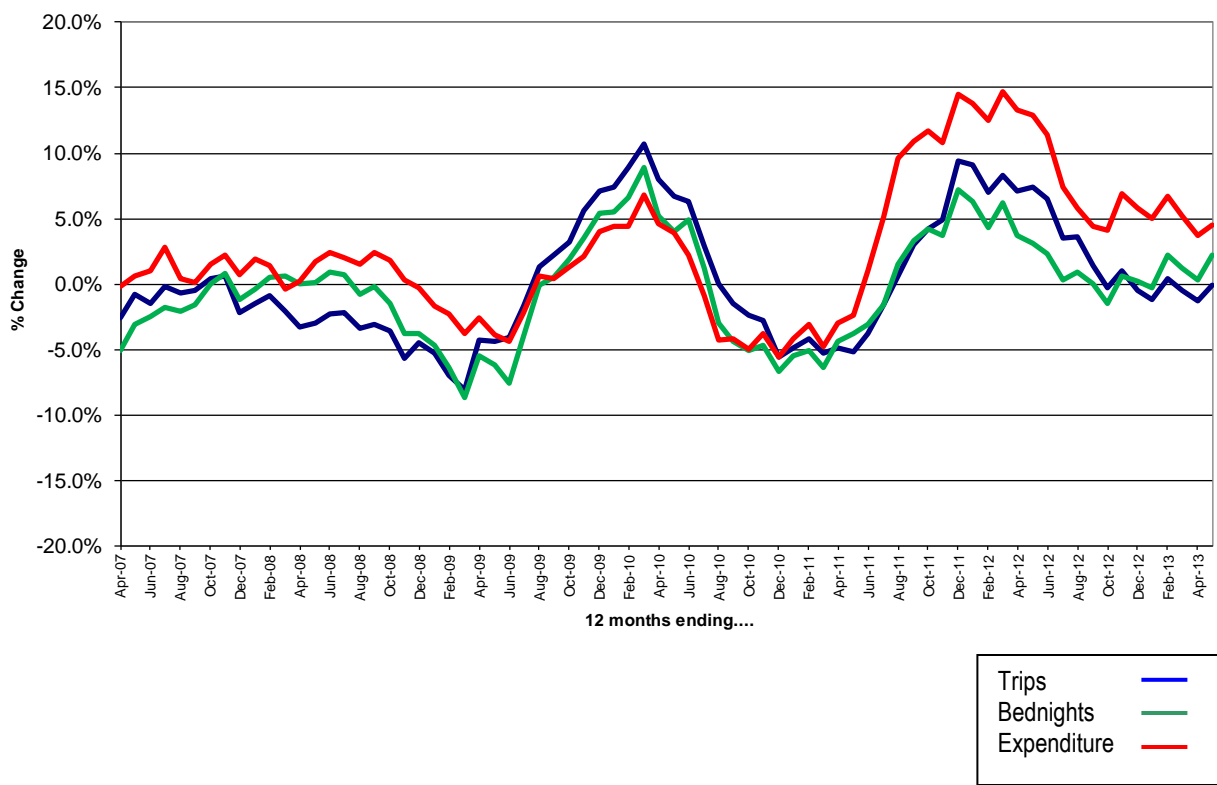
	TRIPS (MILLIONS)			SPEND (£BN)		
	2012	2013	% +/-	2012	2013	% +/-
May 2013	4.7	5.0	+7%	2.6	3.0	+14%
June '12– May '13	56.3	56.9	+1%	31.9	33.0	+4%

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

