

## GB TOURISM SURVEY – November 2013

### SUMMARY OF RESULTS

#### 1. Headlines

- In November 2013 there were 9.1 million domestic overnight trips in Great Britain, down 12% against 2012 when there were 10.4 million trips.
- Nights also fell to 21.0 million (-17%), with expenditure also down by the same amount in November compared with the same month the year before (-17%), falling from £2.0 to £1.6 billion.
- The same pattern was also reflected in England, with trips down 11% to 7.8 million, nights down 18% to 17.4 million, and spend down 18% to £1.4 billion.
- Domestic trip volumes for the year to date were broadly similar to the same period the year before (113.9m in 2012 and 112.6m in 2013), a 1% decline. Expenditure also remained broadly flat, at £21.7bn (-1%), whilst nights have decreased by 3% (from 350 million in 2012 to 341 million in 2013).

#### 2. Context

- It is notable that trip activity in November 2012 was at a much higher level than in any previous year, with a 31% uplift in trip volumes and a 50% uplift in spending compared with November 2011. As a result, despite double digit declines, the results for November 2013 represent the second strongest performance for the month since the current survey started in 2005.
- The weather in November was mixed, with unsettled and wet weather at the start of the month, with some parts of the country experiencing widespread frosts and early season snowfalls by the end of the month.

#### 3. Trip Characteristics

- In the year to date, holiday trips and spend remained flat (0% and -1% respectively), at 54.2 million and £12.8bn respectively. Business trips were down -6% to 16.7 million, however the decline in expenditure was less pronounced, at -2%, falling to £4.1 billion.
- Visits to friends and relatives (VFR) trips remained flat (at 37.9 million), with expenditure down -3% to £4.2 billion.
- Looking at the year to date, spend has declined amongst those in the lowest social grades (C2DE), down -6% (with spend amongst ABC1s flat), and those aged 16-34 (down -7%), compared with +2% for those aged 45+.
- There were also differences by region, with trips volumes to London, the South West and the Midlands up, whilst the remaining regions saw declines in trip volumes, particularly in Yorkshire & the Humber and the East of England.

#### 4. Overseas Travel by UK Resident

- The number of trips taken abroad by UK residents in November increased by +4% when compared with November 2012, with expenditure up +8%. Looking at the year to date, trips were up +2% and spend flat, at -1%.

#### 5. Other Tourism Surveys

- Room occupancy in November increased by +3% compared with the same period in 2012, rising to 67%, with bedspace occupancy remaining broadly flat (+1%), at 49%.

## KEY MEASURES



### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>November '13</b>									
GB	10.4	9.1	-12%	25.3	21.0	-17%	1,969	1,640	-17%
England	8.8	7.8	-11%	21.1	17.4	-18%	1,677	1,384	-18%
<b>Jan-Nov '13</b>									
GB	113.9	112.6	-1%	350.4	341.1	-3%	22,028	21,729	-1%
England	94.2	92.8	-2%	279.3	269.6	-4%	17,923	17,456	-3%

### Purpose of Trip – November 2013

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>GB</b>									
Holiday	3.3	3.4	+5%	7.9	7.8	-2%	791	871	+10%
Business	2.3	1.6	-31%	5.1	3.2	-38%	526	357	-32%
VFR	4.3	3.8	-11%	10.5	9.6	-8%	571	384	-33%
<b>England</b>									
Holiday	2.6	2.8	+5%	6.3	6.1	-3%	672	721	+7%
Business	2.0	1.4	-31%	4.5	2.8	-37%	455	306	-33%
VFR	3.7	3.4	-8%	8.9	8.1	-9%	478	334	-30%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>GB</b>									
Holiday	54.5	54.2	0%	193.8	190.8	-2%	12,878	12,805	-1%
Business	17.7	16.7	-6%	41.6	37.6	-10%	4,187	4,102	-2%
VFR	37.8	37.9	0%	103.9	102.7	-1%	4,355	4,246	-3%
<b>England</b>									
Holiday	43.3	42.7	-1%	148.6	143.7	-3%	10,297	9,957	-3%
Business	14.8	14.2	-4%	34.6	30.5	-12%	3,508	3,444	-2%
VFR	32.7	32.5	-1%	86.6	86.6	0%	3,597	3,550	-1%

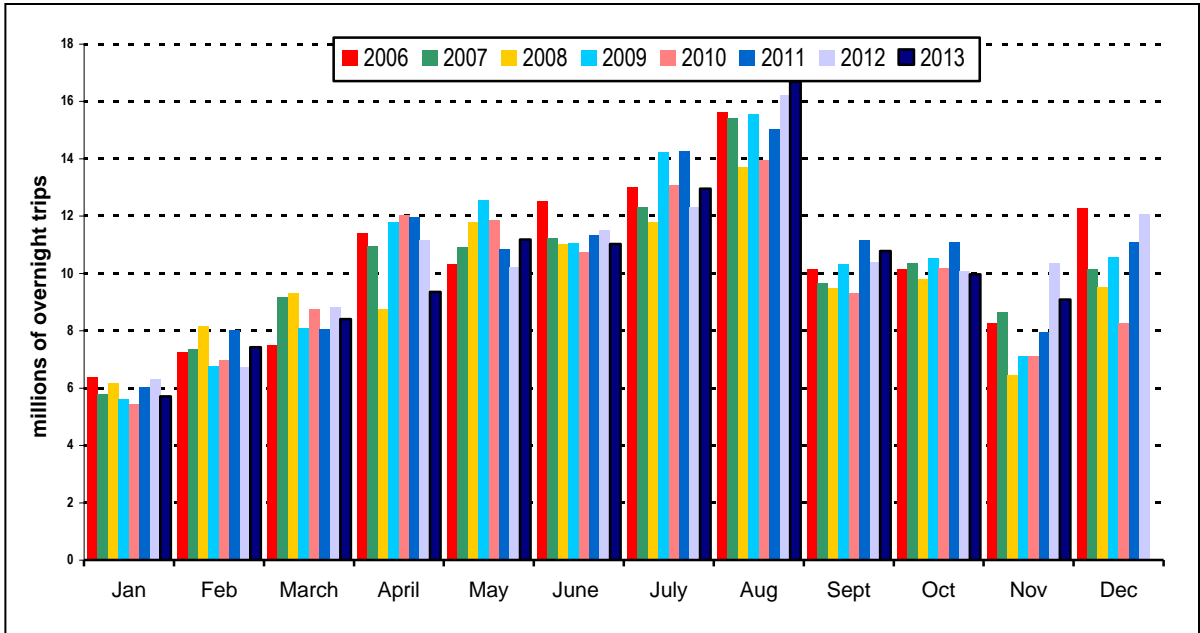
### Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2012	2013	% +/-	2012	2013	% +/-
Nov 2013	3.4	3.5	+4%	1.8	2.0	+8%
Jan '13 - Nov '13	53.5	54.8	+2%	32.5	32.2	-1%
Dec '12 - Nov '13	56.6	57.9	+2%	32.6	33.8	+4%

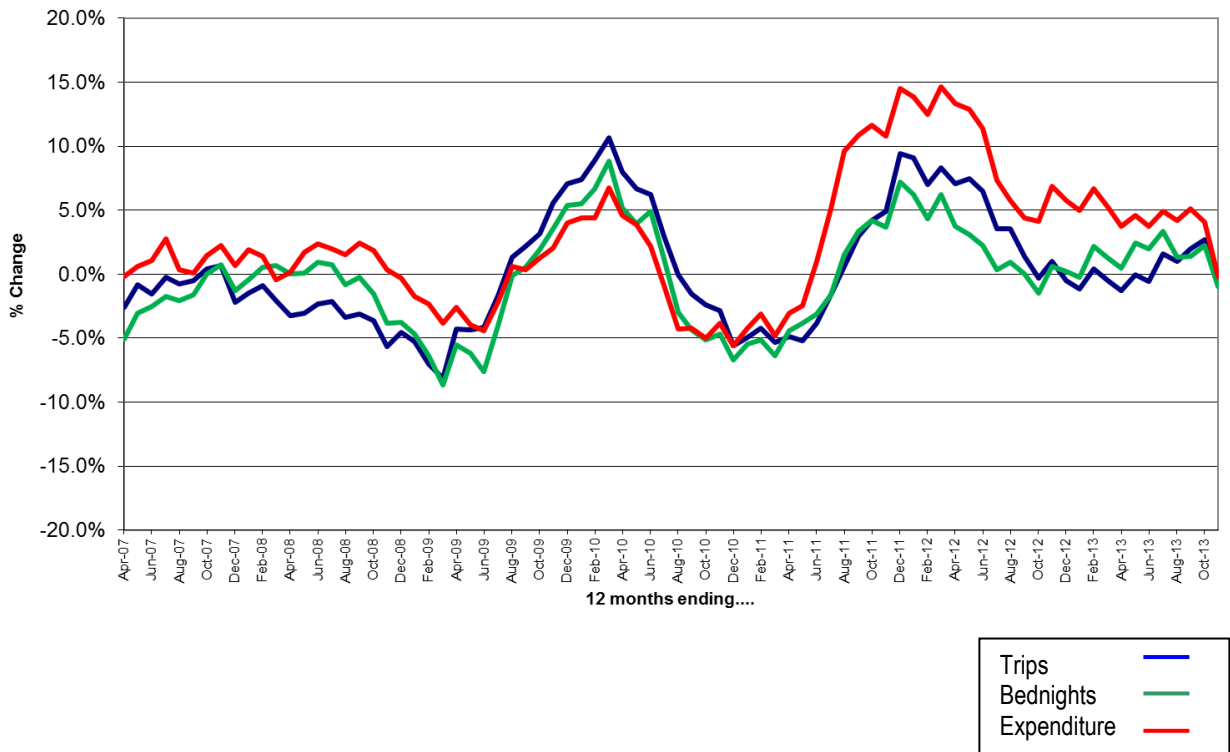
# TREND CHARTS



## 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 (November 2012 vs. November 2013)
- Year to date (Jan-Nov 2012 vs. Jan-Nov 2013)
- 12 month rolling (Dec 2011 – Nov 2012 vs. Dec 2012 - Nov 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.

