

GB TOURISM SURVEY – October 2013

SUMMARY OF RESULTS

1. Headlines

- In October 2013 there were 10.0 million domestic overnight trips in Great Britain, broadly flat against 2012 (-1%), when there were 10.1 million trips.
- Nights also remained flat at 27.1 million (-1%), with expenditure falling by 9% in October compared with the same month the year before (falling from £1.9 to £1.8 billion).
- In England, there were increases in trips and nights (+2% and +3% respectively), with trips increasing from 8.2 to 8.3 million and nights from 21.4 to 22.0 million. However, spend dropped from £1.6 to £1.4bn (-10%).
- Domestic trip volumes in the first ten months of the year were similar to the same period the year before (103.6m in 2012 and 103.5m in 2013). Expenditure also remained flat (remaining at £20.1bn), whilst nights have decreased slightly (down -2% from 325 million in 2012 to 320 million in 2013).

2. Context

- October 2013 was the warmest in England since 2006, with more hours of sunshine and less rainfall than had been recorded in previous years. This was not the case for the rest of the country, with Scotland, for example, suffering much wetter weather conditions than normal.

3. Trip Characteristics

- In the year to date, holiday trips and spend remained flat (-1%) to 50.8 million and £11.9bn respectively. Business trips were down -2% to 15.1 million, however expenditure on business trips increased +2% to £3.7bn.
- Visits to friends and relatives (VFR) trips were up slightly (by +2% from 33.5 million to 34.0 million), as was expenditure on these trips (up +2% from £3.8bn to £3.9bn). This is largely driven by increases in leisure VFR for the year to date (up +3% in trips and +5% in spend).
- Looking at the year to date, spend has declined amongst those with children (-3%) and those in the lowest social grades (C2DE), down -5%.
- There were also differences by location type, with increases in trips, nights and spend to countryside/village locations and large town/cities, and declines in seaside and small town locations.

4. Overseas Travel by UK Resident

- The number of trips taken abroad by UK residents in October declined by -7% when compared with October 2012, with expenditure up +7%. Looking at the year to date, trips were up +2% and spend +5%.

5. Other Tourism Surveys

- In the Autumn 2013 Tourism Business Monitor, which considered September and October 2013, 52% of accommodation businesses and 55% of attractions reported visitor numbers were higher than in 2012.
- In October 2013 England room occupancy and bed-space occupancy remained flat (+1% and 0% respectively) compared to October 2012.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
October '13									
GB	10.1	10.0	-1%	27.4	27.1	-1%	1,923	1,760	-9%
England	8.2	8.3	+2%	21.4	22.0	+3%	1,563	1,414	-10%
Jan-Oct '13									
GB	103.6	103.5	0%	325.1	320.1	-2%	20,060	20,089	0%
England	85.5	85.1	-1%	258.1	252.2	-2%	16,246	16,072	-1%

Purpose of Trip – October 2013

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	4.7	4.8	+2%	13.8	14.7	+7%	1,073	1,057	-2%
Business	1.8	1.6	-9%	3.8	3.1	-19%	386	348	-10%
VFR	3.4	3.4	0%	9.3	8.9	-5%	418	335	-20%
England									
Holiday	3.7	3.8	+2%	10.4	11.5	+10%	866	830	-4%
Business	1.4	1.4	+2%	2.8	2.4	-15%	312	289	-7%
VFR	2.9	3.0	+3%	7.8	7.7	-1%	350	277	-21%

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

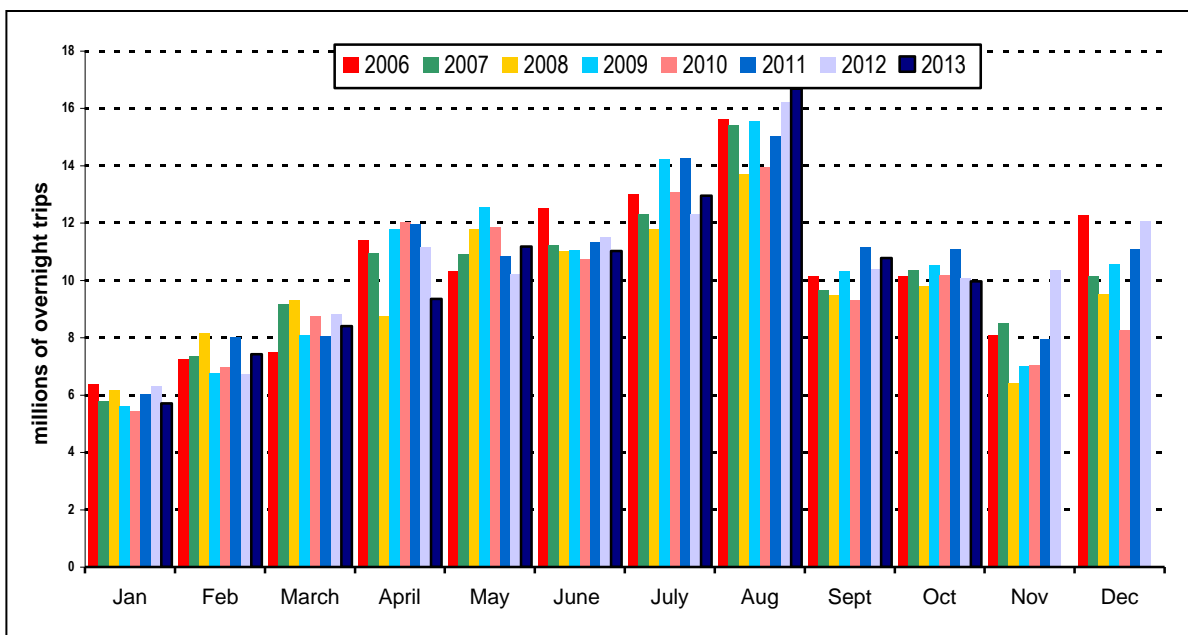
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	51.2	50.8	-1%	185.8	183.0	-2%	12,087	11,934	-1%
Business	15.4	15.1	-2%	36.5	34.5	-5%	3,661	3,745	+2%
VFR	33.5	34.0	+2%	93.4	93.0	0%	3,783	3,862	+2%
England									
Holiday	40.6	40.0	-2%	142.3	137.6	-3%	9,626	9,236	-4%
Business	12.8	12.8	0%	30.1	27.7	-8%	3,053	3,139	+3%
VFR	29.0	29.2	0%	77.7	78.5	+1%	3,119	3,216	+3%

Outbound Travel – UK Residents

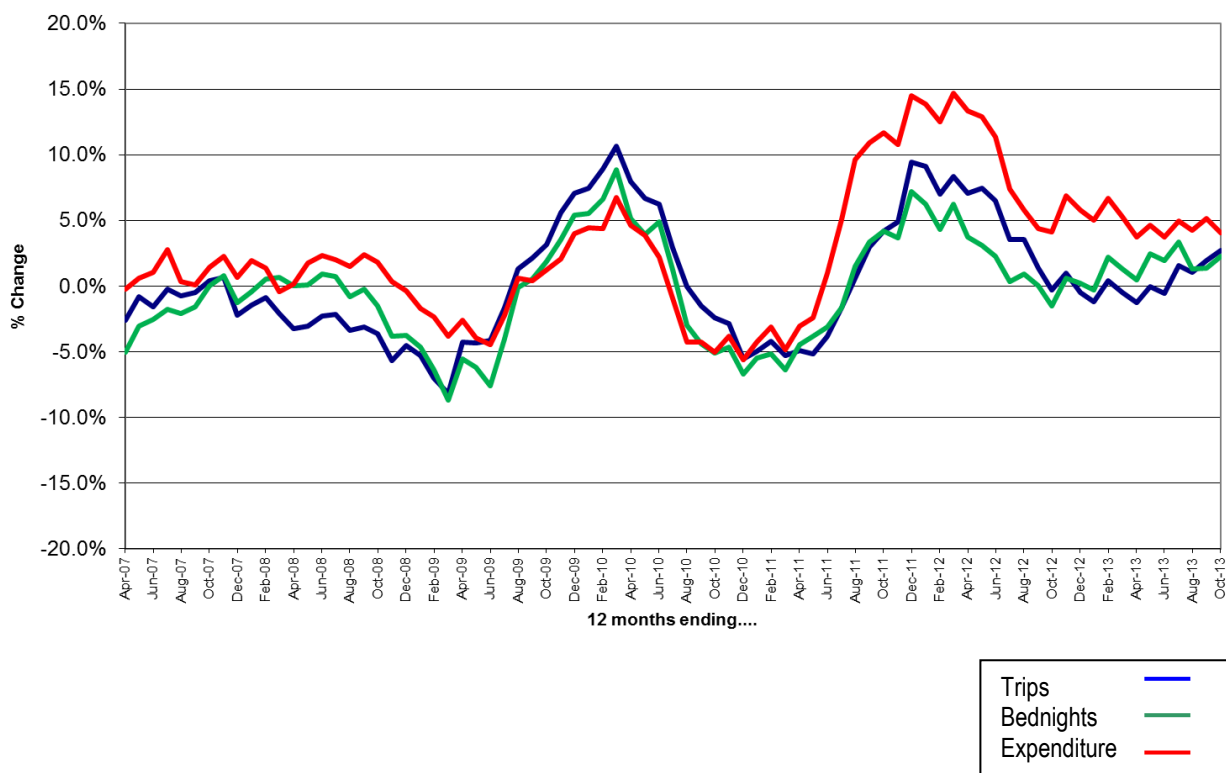
	TRIPS (MILLIONS)			SPEND (£BN)		
	2012	2013	% +/-	2012	2013	% +/-
Oct 2013	5.1	4.8	-7%	2.7	2.9	+7%
Jan '13 - Oct '13	50.1	51.0	+2%	29.0	30.5	+5%
Nov '12- Oct '13	56.5	57.5	+2%	32.6	33.9	+4%

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 (October 2012 vs. October 2013)
- Year to date (Jan-Oct 2012 vs. Jan-Oct 2013)
- 12 month rolling (Nov 2011 – Oct 2012 vs. Nov 2012 - Oct 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

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/rights/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: October 2013			Unweighted Trips	YTD: January - October 2013			Unweighted Trips	12 month rolling Nov 2012 - Oct 2013			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-1.1%	-0.9%	-8.5%	1452	-0.1%	-1.6%	0.1%	14918	2.7%	2.1%	4.1%	12728
PURPOSE:												
Pure Holiday	2.2%	6.6%	-1.5%	709	-0.7%	-1.5%	-1.3%	7550	1.1%	0.4%	2.5%	8216
- 1-3 nights holiday	-3.1%	-1.5%	-8.6%	462	-1.2%	-1.2%	-2.3%	4552	1.1%	1.8%	3.4%	5063
- 4+ nights holiday	15.5%	13.7%	9.2%	247	0.1%	-1.7%	-0.2%	2998	1.2%	-0.3%	1.5%	3153
VFR (on holiday)	-1.2%	3.9%	-12.1%	296	3.2%	4.1%	5.2%	2887	9.1%	12.1%	12.0%	3708
HOLIDAY (TOTAL)	1.2%	5.9%	-3.5%	1005	0.3%	-0.2%	-0.3%	10437	3.5%	3.5%	4.1%	11923
VFR (non-holiday)	2.3%	-16.3%	-30.7%	215	-0.5%	-6.9%	-2.3%	2197	0.6%	-5.0%	4.0%	2710
VFR (TOTAL)	0.3%	-4.5%	-19.9%	511	1.5%	-0.4%	2.1%	5083	5.3%	5.2%	8.7%	6418
Business	-9.1%	-18.7%	-9.8%	200	-1.8%	-5.5%	2.3%	1810	0.7%	-1.1%	3.9%	2097
Regions:												
West Midlands	-2.6%	7.5%	18.1%	93	8.2%	0.9%	14.4%	1013	10.5%	3.2%	21.7%	1201
East of England	-14.9%	1.9%	-18.2%	96	-6.6%	-12.6%	-14.5%	1076	0.3%	-8.4%	-7.7%	1288
East Midlands	-5.3%	19.4%	-1.3%	85	-4.7%	-9.8%	-13.0%	947	0.4%	0.2%	-4.2%	1114
London	-3.8%	-3.1%	-4.9%	129	4.8%	1.6%	6.5%	1346	9.1%	4.0%	15.9%	1604
North West	-12.2%	-12.5%	-20.7%	183	-2.8%	-6.9%	-8.6%	1667	-1.4%	-3.6%	-8.2%	1918
North East	-8.8%	-17.4%	-20.3%	43	-7.6%	-7.2%	0.7%	493	-6.0%	-8.1%	-3.5%	561
South East	32.3%	17.2%	-16.4%	224	5.7%	7.4%	-4.2%	2194	9.0%	9.8%	2.0%	2586
South West	20.0%	5.9%	1.0%	278	-0.5%	-0.6%	2.4%	2467	2.3%	3.8%	5.6%	2777
Yorkshire & the Humber	-11.1%	-1.0%	-11.9%	117	-9.1%	-3.6%	4.8%	1228	-8.1%	1.8%	8.1%	1424
LOCATION TYPE:												
Seaside	0.7%	2.4%	-11.9%	297	-3.9%	-6.7%	-6.0%	3293	-2.0%	-4.4%	-3.0%	3576
Large city/ large town	-4.3%	-4.2%	-13.7%	593	1.2%	0.9%	2.3%	5667	2.6%	3.4%	5.3%	6707
Small town	-2.6%	-9.4%	-20.3%	334	-2.6%	-2.0%	-3.3%	3434	3.0%	3.3%	2.5%	4087
Countryside/ village	9.1%	11.6%	29.2%	257	2.2%	2.0%	6.8%	2876	6.1%	6.9%	11.2%	3308
AGE:												
16-24	4.9%	2.8%	-10.5%	163	2.3%	-1.6%	-7.9%	1668	5.2%	6.0%	0.4%	1965
25-34	13.0%	15.7%	31.8%	230	-2.0%	-4.7%	-3.8%	2608	1.1%	-2.5%	2.4%	3016
35-44	-18.4%	-15.2%	-32.2%	270	0.9%	-5.1%	-1.6%	3040	-0.5%	-3.4%	-1.8%	3476
45-54	-6.1%	-6.7%	-6.5%	285	-3.6%	-0.4%	2.9%	2650	4.1%	6.1%	9.3%	3092
55+	7.5%	4.4%	-7.1%	504	1.9%	1.5%	3.8%	4951	4.1%	4.2%	6.4%	5729
SEG:												
AB	5.3%	-4.7%	-9.6%	491	0.6%	-2.3%	1.4%	5058	3.9%	0.8%	5.7%	5876
C1	0.0%	3.2%	3.0%	461	2.3%	0.9%	2.6%	4502	3.3%	4.9%	6.0%	5222
C2	-2.4%	8.0%	-10.9%	260	-2.0%	-0.6%	-3.5%	2732	2.3%	3.5%	1.4%	3169
DE	-18.0%	-8.6%	-25.4%	240	-5.2%	-5.9%	-6.0%	2626	-1.7%	-2.5%	-3.3%	3011
CHILDREN IN HH:												
Any	-3.1%	8.8%	-15.7%	524	0.0%	-4.5%	-2.8%	5338	2.3%	-0.4%	0.5%	6128
None	-0.2%	-4.9%	-5.5%	928	-0.1%	-0.1%	1.3%	9580	2.9%	3.3%	5.5%	11151
ACCOMMODATION:												
Commercial accom	1.0%	6.5%	-6.0%	880	0.2%	-0.5%	0.7%	9316	3.0%	2.5%	4.2%	10308
- Serviced accom	-4.7%	-5.1%	-6.4%	626	1.1%	0.7%	2.1%	6192	3.2%	3.8%	5.0%	7062
- Hotel/motel/guesthouse	-2.4%	-6.1%	-3.1%	571	2.3%	2.1%	3.8%	5522	4.6%	5.2%	6.7%	6337
- Bed & Breakfast	-21.2%	-10.0%	-37.2%	49	-8.5%	-11.5%	-19.1%	623	-8.1%	-8.9%	-15.1%	676
Total self-catering rented	15.5%	28.2%	-3.2%	233	-0.4%	-0.9%	0.0%	2945	1.2%	1.1%	3.6%	2998
- Camping & Caravanning (inc. owned caravans)	-0.7%	9.4%	-5.0%	146	-0.1%	-5.7%	-2.9%	2204	2.1%	-4.9%	-1.2%	2181
- Other self-catering rented	12.1%	18.6%	-11.8%	126	-3.3%	1.7%	2.5%	1172	1.3%	5.4%	7.5%	1248
Hostels	-45.5%	-63.7%	-46.7%	9	-39.1%	-30.4%	-59.9%	106	-17.4%	-19.4%	-37.4%	142
Own home/friends'/relatives'	-5.1%	-11.1%	-20.1%	562	-0.4%	-2.9%	-0.2%	5469	2.4%	2.0%	5.3%	6806

	England											
	Month: October 2013			Unweighted Trips	YTD: January - October 2013			Unweighted Trips	12 month rolling Nov 2012 - Oct 2013			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	1.8%	2.8%	-9.5%	1213	-0.5%	-2.3%	-1.1%	12261	2.6%	1.7%	3.6%	14279
PURPOSE:												
Pure Holiday	2.2%	10.4%	-4.2%	562	-1.6%	-3.3%	-4.1%	5935	0.6%	-1.0%	0.1%	6498
- 1-3 nights holiday	-4.9%	-2.0%	-10.8%	369	-1.3%	-1.6%	-3.6%	3654	1.3%	1.8%	2.3%	4094
- 4+ nights holiday	21.5%	22.2%	7.2%	193	-2.2%	-4.3%	-4.5%	2274	-0.8%	-2.6%	-2.3%	2393
VFR (on holiday)	2.7%	9.6%	-11.7%	260	3.2%	7.2%	5.5%	2443	8.3%	14.3%	12.7%	3130
HOLIDAY (TOTAL)	2.4%	10.2%	-5.7%	822	-0.3%	-0.8%	-2.5%	8375	3.0%	3.3%	2.3%	9628
VFR (non-holiday)	2.5%	-15.3%	-31.8%	189	-2.8%	-7.5%	0.0%	1913	-1.6%	-6.5%	5.1%	2358
VFR (TOTAL)	2.5%	-1.3%	-20.9%	449	0.4%	1.0%	3.1%	4356	3.7%	5.6%	9.5%	5489
Business	1.9%	-15.1%	-7.4%	173	0.2%	-8.0%	2.8%	1537	4.5%	-1.5%	6.9%	1789
Regions:												
West Midlands	-2.6%	7.5%	18.1%	93	8.2%	0.9%	14.4%	1013	10.5%	3.2%	21.7%	1201
East of England	-14.9%	1.9%	-18.2%	96	-6.6%	-12.6%	-14.5%	1076	0.3%	-8.4%	-7.7%	1288
East Midlands	-5.3%	19.4%	-1.3%	85	-4.7%	-9.8%	-13.0%	947	0.4%	0.2%	-4.2%	1114
London	-3.8%	-3.1%	-4.9%	129	4.8%	1.6%	6.5%	1346	9.1%	4.0%	15.9%	1604
North West	-12.2%	-12.5%	-20.7%	183	-2.8%	-6.9%	-8.6%	1667	-1.4%	-3.6%	-8.2%	1918
North East	-8.8%	-17.4%	-20.3%	43	-7.6%	-7.2%	0.7%	493	-6.0%	-8.1%	-3.5%	561
South East	32.3%	17.2%	-16.4%	224	5.7%	7.4%	-4.2%	2194	9.0%	9.8%	2.0%	2586
South West	20.0%	5.9%	1.0%	278	-0.5%	-0.6%	2.4%	2467	2.3%	3.8%	5.6%	2777
Yorkshire & the Humber	-11.1%	-1.0%	-11.9%	117	-9.1%	-3.6%	4.8%	1228	-8.1%	1.8%	8.1%	1424
LOCATION TYPE:												
Seaside	-0.5%	0.9%	-15.4%	238	-5.2%	-10.3%	-8.0%	2606	-2.6%	-7.3%	-4.0%	2846
Large city/ large town	-1.2%	0.7%	-16.6%	509	2.6%	2.2%	4.0%	4935	4.0%	4.8%	6.5%	5835
Small town	1.4%	-15.6%	-26.6%	280	-1.9%	-2.9%	-5.1%	2759	4.5%	2.4%	2.6%	3320
Countryside/ village	17.9%	37.6%	51.5%	212	-0.6%	2.4%	0.7%	2250	2.7%	7.4%	6.6%	2603
AGE:												
16-24	2.6%	8.9%	-21.3%	142	1.2%	-0.4%	-10.4%	1404	5.0%	9.2%	-0.7%	1668
25-34	6.4%	6.5%	17.6%	183	-4.3%	-8.0%	-4.6%	2136	-0.9%	-5.6%	1.6%	2490
35-44	-10.7%	-12.1%	-32.4%	227	-1.3%	-6.6%	-6.3%	2496	-2.1%	-5.0%	-4.5%	2843
45-54	-3.6%	2.2%	3.0%	240	-2.1%	-3.8%	4.4%	2183	5.7%	2.8%	11.4%	2562
55+	13.5%	8.8%	-9.5%	419	3.1%	3.5%	3.6%	4035	5.3%	6.2%	6.4%	4711
SEG:												
AB	7.5%	-0.9%	-10.8%	402	1.5%	-2.1%	0.9%	4213	5.4%	1.7%	5.8%	4937
C1	2.9%	6.1%	0.2%	388	0.8%	-0.2%	1.0%	3698	1.9%	4.5%	5.7%	4308
C2	2.2%	6.3%	-10.8%	214	-1.4%	-2.2%	-6.4%	2211	3.1%	1.3%	-0.6%	2573
DE	-14.1%	1.1%	-23.9%	211	-7.9%	-7.3%	-6.5%	2117	-4.6%	-3.8%	-4.8%	2428
CHILDREN IN HH:												
Any	2.9%	16.5%	-13.2%	447	-0.5%	-5.7%	-4.2%	4412	2.5%	-1.3%	0.6%	5096
None	1.4%	-3.0%	-8.0%	768	-0.5%	-0.6%	0.2%	7853	2.6%	3.1%	4.8%	9189
ACCOMMODATION:												
Commercial accom	0.6%	6.3%	-8.8%	719	-0.1%	-3.1%	-0.8%	7542	3.0%	0.4%	3.3%	8375
- Serviced accom	-4.6%	-7.4%	-9.9%	520	1.3%	-0.2%	1.8%	5123	3.9%	3.4%	5.1%	5982
- Hotel/motel/guesthouse	-2.6%	-8.3%	-6.9%	475	2.7%	1.4%	3.8%	4586	5.4%	4.8%	6.8%	5277
- Bed & Breakfast	-21.5%	-18.3%	-45.0%	42	-9.9%	-15.3%	-23.6%	503	-8.1%	-10.0%	-16.4%	551
Total self-catering rented	12.9%	30.9%	-5.7%	178	-2.9%	-6.3%	-4.6%	2263	-0.6%	-4.1%	-0.4%	2301
- Camping & Caravanning (inc. owned caravans)	-8.9%	12.2%	-10.6%	99	-1.9%	-7.1%	-8.5%	1664	-1.5%	-6.8%	-7.3%	1637
- Other self-catering rented	16.1%	25.5%	-11.6%	103	-7.9%	-5.4%	-1.7%	871	-2.9%	-0.8%	4.6%	930