

## GB TOURISM SURVEY – September 2013

### SUMMARY OF RESULTS

#### 1. Headlines

- In September 2013 there were 10.8 million domestic overnight trips in Great Britain, a 4% increase from 2012, when there were 10.4 million trips. This was the second highest number of trips recorded in the month of September since the survey began in 2006, bested only by 2011.
- There were also increases recorded in expenditure (9%, from £2.1bn in 2012 to £2.3bn in 2013) and nights (2%, from 32.7 million to 33.3 million).
- In England, trips and expenditure also increased. Trips increased by 3% from 8.6 million to 8.9 million, and spend 6% from £1.7bn to £1.8bn. The number of nights was comparable to last year, down -1% from 26.5 million to 26.2 million.
- A similar number of domestic trips have been taken in the first nine months of this year as had been last year (93.5 million for both 2012 and 2013). Expenditure has also remained flat (up 1% from £18.1bn to £18.3bn), whilst nights have decreased slightly (down -2% from 298 million in 2012 to 293 million in 2013).

#### 2. Context

- September 2013 temperatures, rainfall and sunshine hours were all similar to the average, with some warm summery weather early in the month giving way to cooler conditions later.

#### 3. Trip Characteristics

- In the year to date, holiday trips and spend remained flat, both down -1% to 46.1 million and £10.9bn respectively. Business trips were also down -1% to 13.5 million, however expenditure on business trips has increased 4% to £3.4bn.
- Visits to friends and relatives (VFR) trips were up slightly (by 2% from 30.2 million to 30.7 million), as was expenditure on these trips (up 5% from £3.4bn to £3.5bn). Leisure VFR has particularly increased for the year (up 4% in trips and 7% in spend).
- In the year to date, expenditure on trips by those aged 35 and above has increased, particularly among those aged 55+ (5%). However, spend on trips by those aged 16-24 (-8%) and 25-34 (-6%) has decreased.
- Also this year, expenditure by those in more affluent social grades (ABC1) has increased by 2.6%, whilst spend among those in less affluent social grades (C2DE) has decreased.

#### 4. Overseas Travel by UK Resident

- The number of trips taken abroad by UK residents in September was comparable with 2012 (6.4m each year), with expenditure up 4%. Looking at the year to date, trips were up 3% 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 September 2013 England room occupancy and bed-space occupancy remained flat (0% and -1% respectively) compared to September 2012.

## KEY MEASURES



### Year on Year Comparison – All Trips

|                      | TRIPS (MILLIONS) |      |       | NIGHTS (MILLIONS) |       |       | SPEND (£M) |        |       |
|----------------------|------------------|------|-------|-------------------|-------|-------|------------|--------|-------|
|                      | 2012             | 2013 | % +/- | 2012              | 2013  | % +/- | 2012       | 2013   | % +/- |
| <b>September '13</b> |                  |      |       |                   |       |       |            |        |       |
| GB                   | 10.4             | 10.8 | +4%   | 32.7              | 33.3  | +2%   | 2,072      | 2,258  | +9%   |
| England              | 8.6              | 8.9  | +3%   | 26.5              | 26.2  | -1%   | 1,697      | 1,791  | +6%   |
| <b>Jan-Sept '13</b>  |                  |      |       |                   |       |       |            |        |       |
| GB                   | 93.5             | 93.5 | 0%    | 297.8             | 293.0 | -2%   | 18,137     | 18,329 | +1%   |
| England              | 77.3             | 76.7 | -1%   | 236.7             | 230.2 | -3%   | 14,683     | 14,658 | 0%    |

### Purpose of Trip – September 2013

|                | TRIPS (MILLIONS) |      |       | NIGHTS (MILLIONS) |      |       | SPEND (£M) |       |       |
|----------------|------------------|------|-------|-------------------|------|-------|------------|-------|-------|
|                | 2012             | 2013 | % +/- | 2012              | 2013 | % +/- | 2012       | 2013  | % +/- |
| <b>GB</b>      |                  |      |       |                   |      |       |            |       |       |
| Holiday        | 5.4              | 5.2  | -4%   | 19.8              | 18.9 | -5%   | 1,329      | 1,342 | +1%   |
| Business       | 1.3              | 1.8  | +35%  | 3.0               | 4.5  | +51%  | 249        | 461   | +85%  |
| VFR            | 3.3              | 3.3  | +3%   | 8.8               | 8.6  | -2%   | 423        | 389   | -8%   |
| <b>England</b> |                  |      |       |                   |      |       |            |       |       |
| Holiday        | 4.4              | 4.1  | -8%   | 16.0              | 14.3 | -11%  | 1,090      | 1,015 | -7%   |
| Business       | 1.0              | 1.4  | +39%  | 2.3               | 3.3  | +48%  | 192        | 390   | +103% |
| VFR            | 2.8              | 2.9  | +5%   | 7.2               | 7.5  | +4%   | 348        | 333   | -4%   |

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

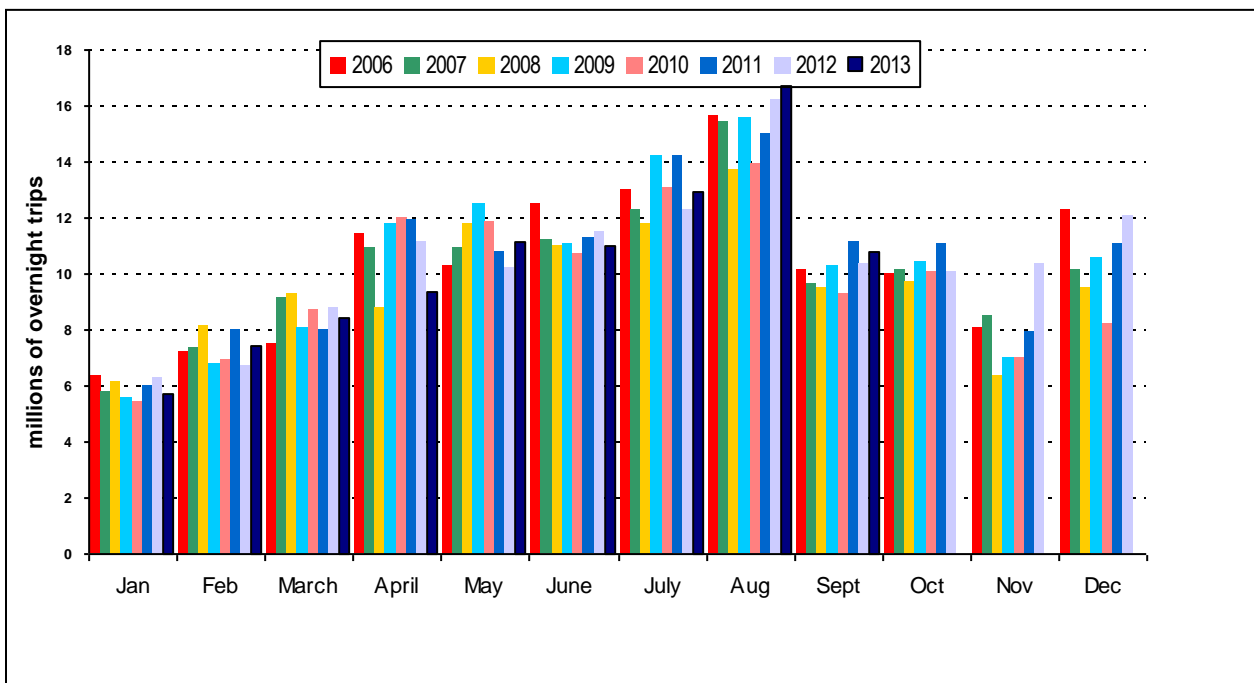
|                | TRIPS (MILLIONS) |      |       | NIGHTS (MILLIONS) |       |       | SPEND (£M) |        |       |
|----------------|------------------|------|-------|-------------------|-------|-------|------------|--------|-------|
|                | 2012             | 2013 | % +/- | 2012              | 2013  | % +/- | 2012       | 2013   | % +/- |
| <b>GB</b>      |                  |      |       |                   |       |       |            |        |       |
| Holiday        | 46.5             | 46.1 | -1%   | 172.0             | 168.2 | -2%   | 11,013     | 10,877 | -1%   |
| Business       | 13.6             | 13.5 | -1%   | 32.7              | 31.4  | -4%   | 3,275      | 3,397  | +4%   |
| VFR            | 30.2             | 30.7 | +2%   | 84.1              | 84.2  | 0%    | 3,365      | 3,528  | +5%   |
| <b>England</b> |                  |      |       |                   |       |       |            |        |       |
| Holiday        | 36.9             | 36.2 | -2%   | 131.9             | 126.1 | -4%   | 8,759      | 8,406  | -4%   |
| Business       | 11.4             | 11.4 | 0%    | 27.3              | 25.3  | -7%   | 2,741      | 2,850  | +4%   |
| VFR            | 26.1             | 26.2 | 0%    | 70.0              | 70.8  | +1%   | 2,768      | 2,939  | +6%   |

### Outbound Travel – UK Residents

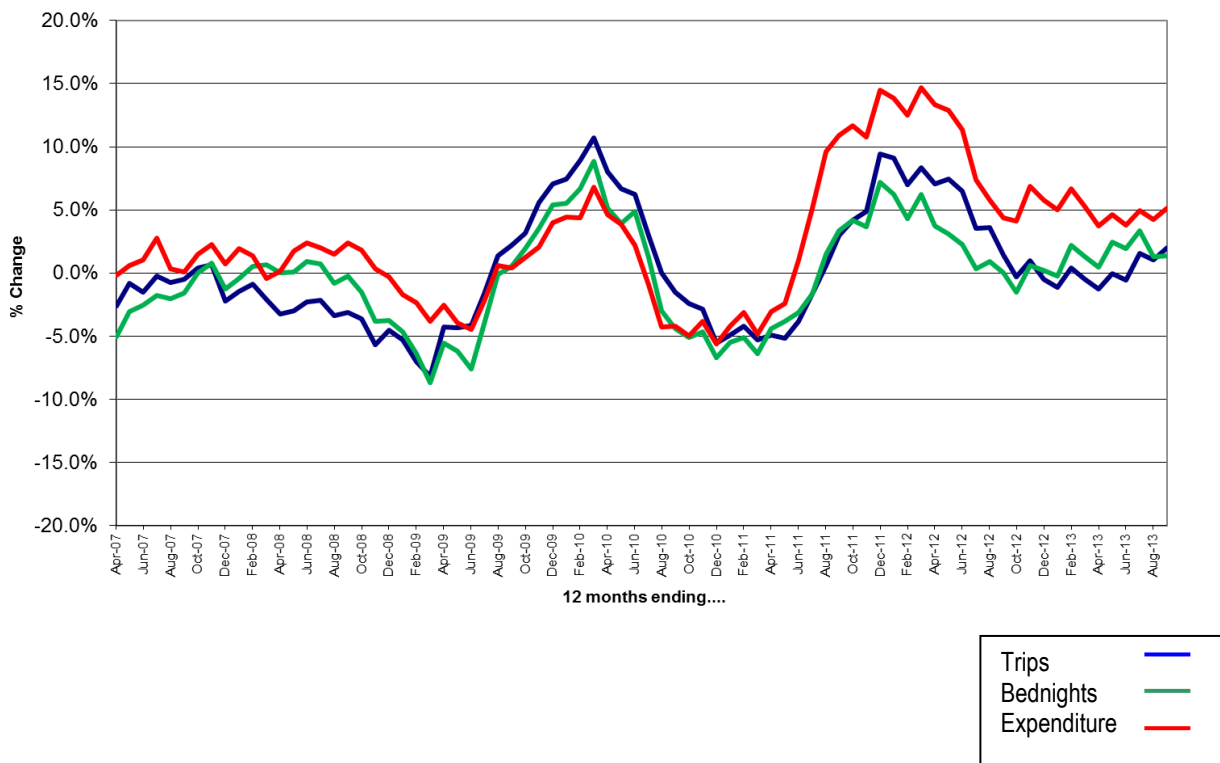
|                           | TRIPS (MILLIONS) |      |       | SPEND (£BN) |      |       |
|---------------------------|------------------|------|-------|-------------|------|-------|
|                           | 2012             | 2013 | % +/- | 2012        | 2013 | % +/- |
| <b>Sept 2013</b>          | 6.4              | 6.4  | 0%    | 3.9         | 4.0  | +4%   |
| <b>Jan '13 - Sept '13</b> | 45.0             | 46.3 | +3%   | 26.3        | 27.5 | +5%   |
| <b>Oct '12- Sept '13</b>  | 56.6             | 57.8 | +2%   | 32.6        | 33.7 | +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 (September 2012 vs. September 2013)
- Year to date (Jan-Sep 2012 vs. Jan-Sep 2013)
- 12 month rolling (Oct 2011 – Sep 2012 vs. Oct 2012 - Sep 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/nights/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: September 2013 |           |             | Unweighted Trips | YTD: January - September 2013 |           |             | Unweighted Trips | 12 month rolling Oct 2012 - Sep 2013 |           |             | Unweighted Trips |
|   | Trips                 | Bednights | Expenditure |                  | Trips                         | Bednights | Expenditure |                  | Trips                                | Bednights | Expenditure |                  |
| <b>TOTAL</b>                                  | 3.9%                  | 1.7%      | 9.0%        | 1554             | 0.0%                          | -1.6%     | 1.1%        | 13466            | 2.0%                                 | 1.2%      | 5.1%        | 17229            |
| <b>PURPOSE:</b>                               |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| Pure Holiday                                  | -3.5%                 | -4.9%     | 1.0%        | 782              | -1.0%                         | -2.2%     | -1.2%       | 6841             | 0.6%                                 | -0.6%     | 3.4%        | 8172             |
| - 1-3 nights holiday                          | 1.0%                  | 6.2%      | 13.9%       | 471              | -1.0%                         | -1.2%     | -1.6%       | 4090             | 1.8%                                 | 2.8%      | 6.1%        | 5066             |
| - 4+ nights holiday                           | -10.2%                | -9.8%     | -8.9%       | 311              | -1.1%                         | -2.7%     | -0.9%       | 2751             | -1.5%                                | -2.4%     | 0.7%        | 3106             |
| VFR (on holiday)                              | -10.0%                | -14.6%    | -12.7%      | 239              | 3.7%                          | 4.1%      | 7.2%        | 2590             | 9.9%                                 | 12.0%     | 14.5%       | 3708             |
| <b>HOLIDAY (TOTAL)</b>                        | -5.1%                 | -6.9%     | -1.0%       | 1021             | 0.2%                          | -0.8%     | 0.1%        | 9431             | 3.3%                                 | 2.8%      | 5.4%        | 11879            |
| VFR (non-holiday)                             | 16.3%                 | 15.1%     | -3.1%       | 259              | -0.8%                         | -5.8%     | 1.4%        | 1982             | -2.6%                                | -5.8%     | 6.7%        | 2711             |
| <b>VFR (TOTAL)</b>                            | 2.5%                  | -1.9%     | -8.0%       | 498              | 1.7%                          | 0.1%      | 4.8%        | 4572             | 4.1%                                 | 4.7%      | 11.2%       | 6418             |
| Business                                      | 34.9%                 | 50.5%     | 85.1%       | 218              | -0.8%                         | -3.9%     | 3.7%        | 1610             | 0.6%                                 | -1.7%     | 3.3%        | 2082             |
| <b>Regions:</b>                               |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| West Midlands                                 | 1.5%                  | -20.8%    | 22.1%       | 115              | 9.4%                          | 0.4%      | 14.2%       | 920              | 10.0%                                | 0.9%      | 20.2%       | 1197             |
| East of England                               | -14.2%                | -27.6%    | -2.0%       | 106              | -5.7%                         | -13.6%    | -14.1%      | 979              | 0.0%                                 | -9.2%     | -5.5%       | 1298             |
| East Midlands                                 | -6.1%                 | -11.4%    | -4.0%       | 97               | -4.7%                         | -12.0%    | -13.9%      | 862              | -0.8%                                | -3.5%     | -6.0%       | 1111             |
| London  | 8.7%                  | 11.4%     | 3.2%        | 124              | 5.8%                          | 2.1%      | 8.0%        | 1217             | 8.8%                                 | 3.0%      | 17.5%       | 1608             |
| North West                                    | 23.2%                 | 18.0%     | 15.4%       | 200              | -1.6%                         | -6.3%     | -7.1%       | 1484             | -0.4%                                | -3.3%     | -6.2%       | 1932             |
| North East                                    | -30.1%                | -57.6%    | -47.6%      | 44               | -7.5%                         | -6.4%     | 2.9%        | 450              | -6.9%                                | -9.0%     | -1.4%       | 564              |
| South East                                    | -9.6%                 | -6.3%     | -8.2%       | 206              | 3.4%                          | 6.5%      | -3.0%       | 1970             | 6.5%                                 | 6.9%      | 5.1%        | 2531             |
| South West                                    | 26.4%                 | 28.2%     | 26.7%       | 272              | -2.5%                         | -1.1%     | 2.5%        | 2189             | 0.5%                                 | 4.5%      | 6.5%        | 2711             |
| Yorkshire & the Humber                        | -13.4%                | 1.0%      | -1.7%       | 123              | -8.9%                         | -3.8%     | 6.8%        | 1111             | -9.0%                                | -1.1%     | 10.3%       | 1436             |
| <b>LOCATION TYPE:</b>                         |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| Seaside                                       | -3.9%                 | -3.9%     | -6.9%       | 361              | -4.3%                         | -7.3%     | -5.5%       | 2996             | -2.8%                                | -5.6%     | -2.0%       | 3555             |
| Large city/ large town                        | 14.7%                 | 19.7%     | 21.1%       | 596              | 1.9%                          | 1.5%      | 4.3%        | 5074             | 2.5%                                 | 2.7%      | 7.6%        | 6696             |
| Small town                                    | -9.5%                 | -1.7%     | 9.8%        | 356              | -2.6%                         | -1.2%     | -1.4%       | 3100             | 2.0%                                 | 3.9%      | 4.8%        | 4089             |
| Countryside/ village                          | 2.3%                  | -8.2%     | 6.6%        | 268              | 1.6%                          | 1.3%      | 5.0%        | 2619             | 4.2%                                 | 4.7%      | 8.1%        | 3286             |
| <b>AGE:</b>                                   |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| 16-24   | 4.5%                  | 9.6%      | -11.2%      | 168              | 2.1%                          | -2.0%     | -7.6%       | 1506             | 4.1%                                 | 3.9%      | 1.6%        | 1989             |
| 25-34   | -12.0%                | -13.3%    | -5.7%       | 244              | -3.3%                         | -6.2%     | -6.4%       | 2377             | -0.9%                                | -5.7%     | -0.1%       | 3005             |
| 35-44   | 25.1%                 | 24.0%     | 54.6%       | 291              | 3.2%                          | -4.1%     | 2.0%        | 2770             | 5.0%                                 | -2.7%     | 1.6%        | 3496             |
| 45-54   | 19.9%                 | 6.2%      | 18.4%       | 277              | -3.3%                         | 0.2%      | 3.9%        | 2365             | 0.3%                                 | 6.4%      | 10.3%       | 3078             |
| 55+   | -5.7%                 | -3.5%     | -2.1%       | 574              | 1.3%                          | 1.3%      | 5.0%        | 4447             | 2.4%                                 | 3.2%      | 7.8%        | 5660             |
| <b>SEG:</b>                                   |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| AB  | 5.6%                  | 0.1%      | 17.0%       | 541              | 0.1%                          | -2.1%     | 2.6%        | 4567             | 2.4%                                 | 1.1%      | 7.6%        | 5808             |
| C1  | 10.6%                 | 18.6%     | 4.3%        | 455              | 2.5%                          | 0.7%      | 2.6%        | 4040             | 2.0%                                 | 3.4%      | 4.6%        | 5204             |
| C2  | 2.1%                  | -6.3%     | 5.9%        | 293              | -1.9%                         | -1.3%     | -2.7%       | 2472             | 1.6%                                 | 0.6%      | 2.0%        | 3168             |
| DE  | -11.8%                | -11.5%    | -2.4%       | 265              | -3.6%                         | -5.6%     | -3.5%       | 2385             | 1.2%                                 | -2.2%     | 1.7%        | 3049             |
| <b>CHILDREN IN H/H:</b>                       |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| Any   | 6.5%                  | -0.9%     | 29.6%       | 475              | 0.3%                          | -5.6%     | -1.4%       | 4814             | 1.5%                                 | -2.5%     | 2.3%        | 6105             |
| None  | 3.0%                  | 2.5%      | 3.4%        | 1079             | -0.1%                         | 0.4%      | 2.1%        | 8651             | 2.2%                                 | 3.0%      | 6.3%        | 11223            |
| <b>ACCOMMODATION:</b>                         |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| Commercial accom                              | 6.7%                  | 2.7%      | 9.9%        | 1017             | 0.2%                          | -1.1%     | 1.4%        | 8438             | 2.1%                                 | 1.2%      | 5.2%        | 10261            |
| - Serviced accom                              | 5.0%                  | 0.5%      | 14.2%       | 674              | 1.8%                          | 1.4%      | 3.1%        | 5566             | 2.9%                                 | 3.8%      | 5.7%        | 7065             |
| - Hotel/motel/guesthouse                      | 9.7%                  | 7.3%      | 21.6%       | 600              | 2.9%                          | 3.0%      | 4.6%        | 4951             | 3.8%                                 | 5.0%      | 6.8%        | 6326             |
| - Bed & Breakfast                             | -12.6%                | -10.5%    | -5.3%       | 71               | -7.2%                         | -11.7%    | -17.3%      | 573              | -5.3%                                | -7.0%     | -9.1%       | 686              |
| Total self-catering rented                    | -3.4%                 | -4.2%     | 0.6%        | 267              | -1.6%                         | -2.7%     | 0.3%        | 2711             | 0.7%                                 | -1.5%     | 5.1%        | 2957             |
| - Camping & Caravanning (inc. owned caravans) | -5.5%                 | -10.9%    | -4.9%       | 216              | 0.0%                          | -6.5%     | -2.7%       | 2057             | 0.2%                                 | -6.8%     | -2.0%       | 2174             |
| - Other self-catering rented                  | -6.8%                 | -5.7%     | 0.3%        | 118              | -4.8%                         | 0.1%      | 4.1%        | 1046             | 1.9%                                 | 4.7%      | 12.5%       | 1231             |
| Hostels                                       | 220.2%                | 320.7%    | -19.0%      | 41               | -38.5%                        | -27.1%    | -60.8%      | 97               | -19.0%                               | -16.1%    | -34.2%      | 148              |
| Own home/friends/relatives'                   | -1.8%                 | 1.7%      | 1.1%        | 518              | 0.2%                          | -2.0%     | 2.4%        | 4907             | 2.3%                                 | 2.4%      | 7.5%        | 6809             |

|                            | England               |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
|----------------------------|-----------------------|-----------|-------------|------------------|-------------------------------|-----------|-------------|------------------|--------------------------------------|-----------|-------------|------------------|
|                            | Month: September 2013 |           |             | Unweighted Trips | YTD: January - September 2013 |           |             | Unweighted Trips | 12 month rolling Oct 2012 - Sep 2013 |           |             | Unweighted Trips |
|                            | Trips                 | Bednights | Expenditure |                  | Trips                         | Bednights | Expenditure |                  | Trips                                | Bednights | Expenditure |                  |
| <b>TOTAL</b>               | 3.1%                  | -1.0%     | 5.5%        | 1284             | -0.7%                         | -2.7%     | -0.2%       | 11049            | 2.0%                                 | 1.2%      | 5.1%        | 14205            |
| <b>PURPOSE:</b>            |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| Pure Holiday               | -7.6%                 | -10.8%    | -6.9%       | 614              | -2.0%                         | -4.4%     | -4.0%       | 5372             | 0.0%                                 | -2.4%     | 1.5%        | 6463             |
| - 1-3 nights holiday       | -3.8%                 | -0.2%     | 4.6%        | 375              | -0.9%                         | -1.5%     | -2.7%       | 3285             | 2.1%                                 | 2.8%      | 5.5%        | 4102             |
| - 4+ nights holiday        | -13.6%                | -15.6%    | -16.5%      | 238              | -3.8%                         | -5.9%     | -5.4%       | 2081             | -3.8%                                | -5.2%     | -2.9%       | 2349             |
| VFR (on holiday)           | -7.5%                 | -11.0%    | -9.8%       | 207              | 3.3%                          | 7.0%      | 7.6%        | 2182             | 9.1%                                 | 14.0%     | 15.8%       | 3121             |
| <b>HOLIDAY (TOTAL)</b>     | -7.6%                 | -10.8%    | -7.3%       | 821              | -0.5%                         | -1.7%     | -2.2%       | 7552             | 2.8%                                 | 2.2%      | 4.0%        | 9554             |
| VFR (non-holiday)          | 17.8%                 | 24.9%     | 3.2%        | 232              | -3.4%                         | -6.6%     | 4.2%        | 1724             | -4.5%                                | -6.6%     | 8.3%        | 2359             |
| <b>VFR (TOTAL)</b>         | 4.7%                  | 4.1%      | -4.3%       | 440              | 0.2%                          | 1.3%      | 6.2%        | 3907             | 2.7%                                 | 5.2%      | 12.6%       | 5480             |
| Business                   | 39.4%                 | 47.5%     | 103.1%      | 176              | 0.0%                          | -7.2%     | 4.0%        | 1364             | 2.9%                                 | -2.9%     | 7.1%        | 1758             |
| <b>Regions:</b>            |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| West Midlands              | 1.5%                  | -20.8%    | 22.1%       | 115              | 9.4%                          | 0.4%      | 14.2%       | 920              | 10.0%                                | 0.9%      | 20.2%       | 1197             |
| East of England            | -14.2%                | -27.6%    | -2.0%       | 106              | -5.7%                         | -13.6%    | -14.1%      | 979              | 0.0%                                 | -9.2%     | -5.5%       | 1298             |
| East Midlands              | -6.1%                 | -11.4%    | -4.0%       | 97               | -4.7%                         | -12.0%    | -13.9%      | 862              | -0.8%                                | -3.5%     | -6.0%       | 1111             |
| London                     | 8.7%                  | 11.4%     | 3.2%        | 124              | 5.8%                          | 2.1%      | 8.0%        | 1217             | 8.8%                                 | 3.0%      | 17.5%       | 1608             |
| North West                 | 23.2%                 | 18.0%     | 15.4%       | 200              | -1.6%                         | -6.3%     | -7.1%       | 1484             | -0.4%                                | -3.3%     | -6.2%       | 1932             |
| North East                 | -30.1%                | -57.6%    | -47.6%      | 44               | -7.5%                         | -6.4%     | 2.9%        | 450              | -6.9%                                | -9.0%     | -1.4%       | 564              |
| South East                 | -9.6%                 | -6.3%     | -8.2%       | 206              | 3.4%                          | 6.5%      | -3.0%       | 1970             | 6.5%                                 | 6.9%      | 5.1%        | 2531             |
| South West                 | 26.4%                 | 28.2%     | 26.7%       | 272              | -2.5%                         | -1.1%     | 2.5%        | 2189             | 0.5%                                 | 4.5%      | 6.5%        | 2711             |
| Yorkshire & the Humber     | -13.4%                | 1.0%      | -1.7%       | 123              | -8.9%                         | -3.8%     | 6.8%        | 1111             | -9.0%                                | -1.1%     | 10.3%       | 1436             |
| <b>LOCATION TYPE:</b>      |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| Seaside                    | -8.1%                 | -7.5%     | -12.5%      | 285              | -5.6%                         | -11.1%    | -7.4%       | 2368             | -3.3%                                | -8.2%     | -2.2%       | 2832             |
| Large city/ large town     | 16.9%                 | 24.2%     | 23.9%       | 527              | 3.1%                          | 2.4%      | 6.7%        | 4426             | 3.6%                                 | 3.5%      | 9.7%        | 5810             |
| Small town                 | -8.9%                 | -5.8%     | 9.2%        | 287              | -2.2%                         | -1.6%     | -2.7%       | 2479             | 3.3%                                 | 4.3%      | 5.9%        | 3311             |
| Countryside/ village       | -2.7%                 | -17.9%    | -6.5%       | 205              | -2.2%                         | -0.2%     | -3.2%       | 2038             | 0.0%                                 | 2.8%      | 2.3%        | 2571             |
| <b>AGE:</b>                |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| 16-24                      | -1.6%                 | 5.1%      | -25.6%      | 140              | 1.0%                          | -1.2%     | -9.4%       | 1262             | 4.4%                                 | 6.4%      | 2.3%        | 1691             |
| 25-34                      | -15.6%                | -18.7%    | -10.7%      | 196              | -5.3%                         | -9.1%     | -6.3%       | 1952             | -2.2%                                | -7.9%     | 0.5%        | 2491             |
| 35-44                      | 15.5%                 | 7.4%      | 44.3%       | 241              | -0.3%                         | -6.1%     | -3.4%       | 2269             | -3.0%                                | -4.6%     | -0.7%       | 2838             |
| 45-54                      | 29.2%                 | 17.2%     | 27.4%       | 238              | -1.9%                         | -4.4%     | 4.5%        | 1943             | 6.7%                                 | 2.7%      | 12.1%       | 2545             |
| 55+                        | -4.6%                 | -6.3%     | -7.0%       | 466              | 2.0%                          | 3.0%      | 5.2%        | 3617             | 2.8%                                 | 4.6%      | 7.8%        | 4635             |
| <b>SEG:</b>                |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| AB                         | 9.7%                  | -1.4%     | 21.9%       | 459              | 0.9%                          | -2.2%     | 2.2%        | 3810             | 3.5%                                 | 1.2%      | 7.9%        | 4874             |
| C1                         | 0.8%                  | 6.1%      | -7.1%       | 360              | 0.5%                          | -0.8%     | 1.1%        | 3309             | 0.5%                                 | 3.3%      | 5.7%        | 4283             |
| C2                         | 11.0%                 | -0.2%     | 2.8%        | 255              | -1.7%                         | -2.9%     | -6.0%       | 1997             | 1.9%                                 | -1.5%     | 0.2%        | 2563             |
| DE                         | -17.5%                | -12.8%    | -10.1%      | 208              | -7.1%                         | -8.1%     | -4.2%       | 1904             | -1.9%                                | -4.5%     | 0.2%        | 2452             |
| <b>CHILDREN IN H/H:</b>    |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| Any                        | 6.7%                  | -2.7%     | 35.3%       | 395              | -0.8%                         | -7.5%     | -3.3%       | 3966             | 0.9%                                 | -4.0%     | 2.1%        | 5053             |
| None                       | 1.8%                  | -0.5%     | -2.6%       | 889              | -0.7%                         | -0.3%     | 1.1%        | 7085             | 1.9%                                 | 2.7%      | 6.4%        | 9155             |
| <b>ACCOMMODATION:</b>      |                       |           |             |                  |                               |           |             |                  |                                      |           |             |                  |
| Commercial accom           | 3.9%                  | -2.3%     | 6.1%        | 821              | -0.2%                         | -3.9%     | 0.0%        | 6824             | 2.3%                                 | -0.5%     | 5.1%        | 8340             |
| - Serviced accom           | 3.8%                  | -2.3%     | 12.3%       | 553              | 2.0%                          | 0.6%      | 3.1%        | 4603             | 3.7%                                 | 4.0%      | 6.8%        | 5863             |
| - Hotel/motel/guesthouse   | 6.2%                  | 3.9%      | 20.6%       | 489              | 3.3%                          | 2.6%      | 5.0%        | 4112             | 4.6%                                 | 5.1%      | 7.8%        | 5269             |
| - Bed & Breakfast          | -0.9%                 | -16.6%    | -14.0%      | 61               | -8.8%                         | -15.0%    | -21.5%      | 461              | -5.0%                                | -6.6%     | -9.3%       | 560              |
| Total self-catering rented | -12.3%                | -13.8%    | -8.3%       | 213              | -4.0%                         | -8.4%     | -4.5%       | 2083             | -1.4%                                | -6.4%     | 1.7%        | 2273             |