GB TOURISM SURVEY - November 2012
SUMMARY OF RESULTS

1. Headlines

- There were 10.4 million domestic overnight trips in Great Britain in November, an increase of 31% on the 2011 November figure of 7.9 million.
- In the year to date (January to November), the number of trips and nights in GB fell slightly (both by 1%), while expenditure was up by 5% on 2011.
- In the past 12 months, the number of trips taken in Great Britain compared with the same period the year has remained largely flat (up 1%).

2. Context

- November started with three weeks of cold but sunny weather across much of Britain. However, the fourth week was one of the wettest on record with flooding in many parts.
- The half term holiday ran into early November 2012 (29/10-02/11) whereas in 2011 it was entirely in October (24/10-28/10).
- Note that historically, November base sizes have been lower than the average for other months, and as a result, margins of error are greater. Care should therefore be taken in interpreting single months results.

3. Trip Characteristics

- Between January and November 2012, the number of holiday trips in Great Britain decreased by 2%, from 55.4 million to 54.5 million, with nights also down by 4%. Expenditure, however, saw an increase of 5%.
- The number of shorter breaks (1-3 nights) remained flat. This is compared to longer breaks, which was down 5% against the same period in 2011. Positively, spend on 1-3 night breaks was up (+9%), driving the overall increase in holiday expenditure.
- The volume of trips to visit friends and relatives (VFR) also decreased in the year to November 2012 (down 3%) with nights remaining flat. This pattern is being driven particularly by a decrease in non-leisure VFR, with leisure VFR remaining buoyant.
- Business trips have increased in the year to November 2012, up 2% to 17.7 million, as has nights and spend (up 6% and 2% respectively).
- Trips to Countryside/Villages have decreased (-5%), as have trips to the seaside (-3%), with trips to both large and small towns remaining steady (+1% for both).
- Some regions of the country are also faring better than others, with London and the South East seeing the biggest increases in trip taking (up 8% and 4%), with the East Midlands and the East of England seeing the biggest decreases (down 7% and 6% respectively).

4. Overseas Travel by UK Residents

- Trips abroad by UK residents were largely flat in November compared to the same time last year (+1%), with year to date trips also flat. The amount spent in November, and so far this year, has increased by 3% against 2011 levels.

5. Other Tourism Surveys

- November results from the England Occupancy Survey saw slight increases in both room and bedspace occupancy (up 1% and 2% respectively).

KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
November '12									
GB	7.9	10.4	**+31%**	17.3	25.3	**+46%**	1,313	1,969	**+50%**
England	6.8	8.8	**+30%**	14.4	21.1	**+47%**	1,085	1,677	**+55%**
Jan-Nov '12									
GB	115.6	113.9	**-1%**	355.1	350.4	**-1%**	20,975	22,028	**+5%**
England	95.1	94.2	**-1%**	280.7	279.3	**-1%**	16,593	17,923	**+8%**

Purpose of Trip – November 2012

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	2.5	3.3	**+33%**	5.8	7.9	**+36%**	512	791	**+55%**
Business	2.0	2.3	**+15%**	4.0	5.1	**+29%**	446	526	**+18%**
VFR	3.2	4.3	**+35%**	6.8	10.5	**+54%**	306	571	**+87%**
England									
Holiday	2.1	2.7	**+28%**	4.8	6.3	**+32%**	433	672	**+55%**
Business	1.6	2.0	**+28%**	3.0	4.5	**+48%**	338	455	**+35%**
VFR	2.9	3.7	**+28%**	5.9	8.9	**+49%**	271	478	**+76%**

Purpose of Trip – Year to Date (January – November 2012)

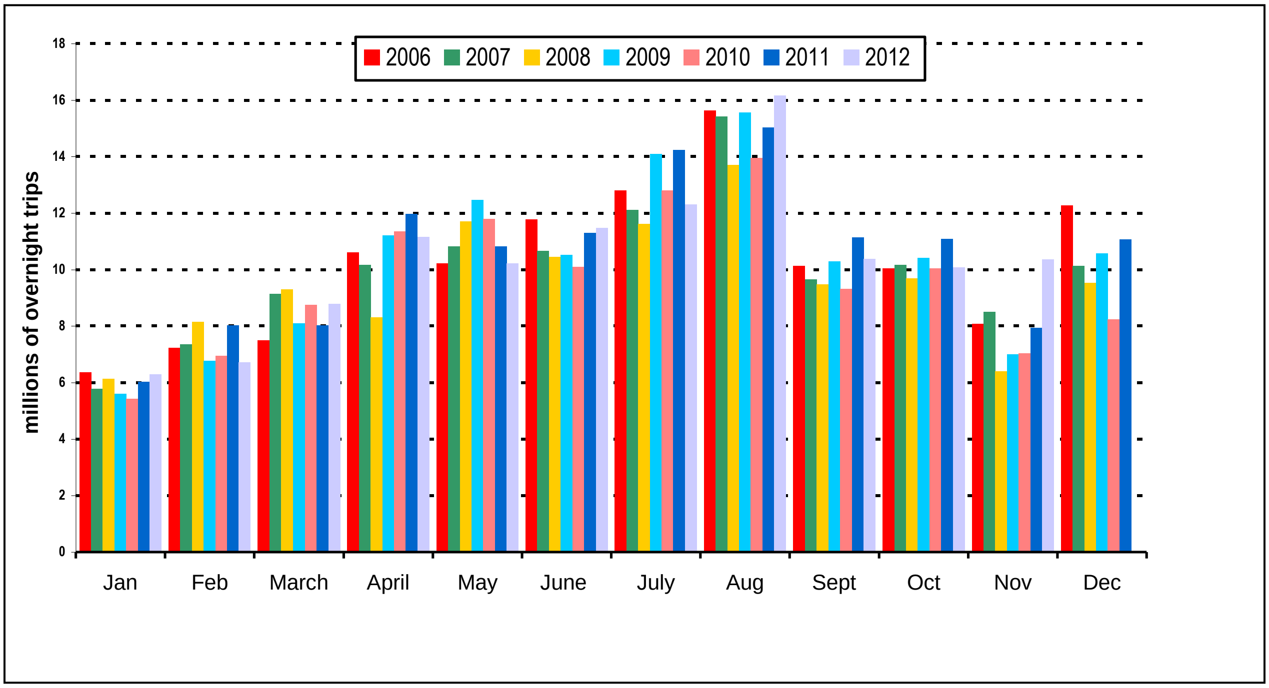
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	55.4	54.5	**-2%**	200.8	193.8	**-4%**	12,319	12,878	**+5%**
Business	17.4	17.7	**+2%**	39.3	41.6	**+6%**	4,109	4,187	**+2%**
VFR	39.1	37.8	**-3%**	104.1	103.9	**0%**	4,066	4,355	**+7%**
England									
Holiday	43.8	43.3	**-1%**	152.0	148.6	**-2%**	9,482	10,297	**+9%**
Business	14.7	14.8	**+1%**	31.9	34.6	**+8%**	3,339	3,508	**+5%**
VFR	33.7	32.7	**-3%**	87.4	86.6	**-1%**	3,376	3,597	**+7%**

Outbound Travel – UK Residents

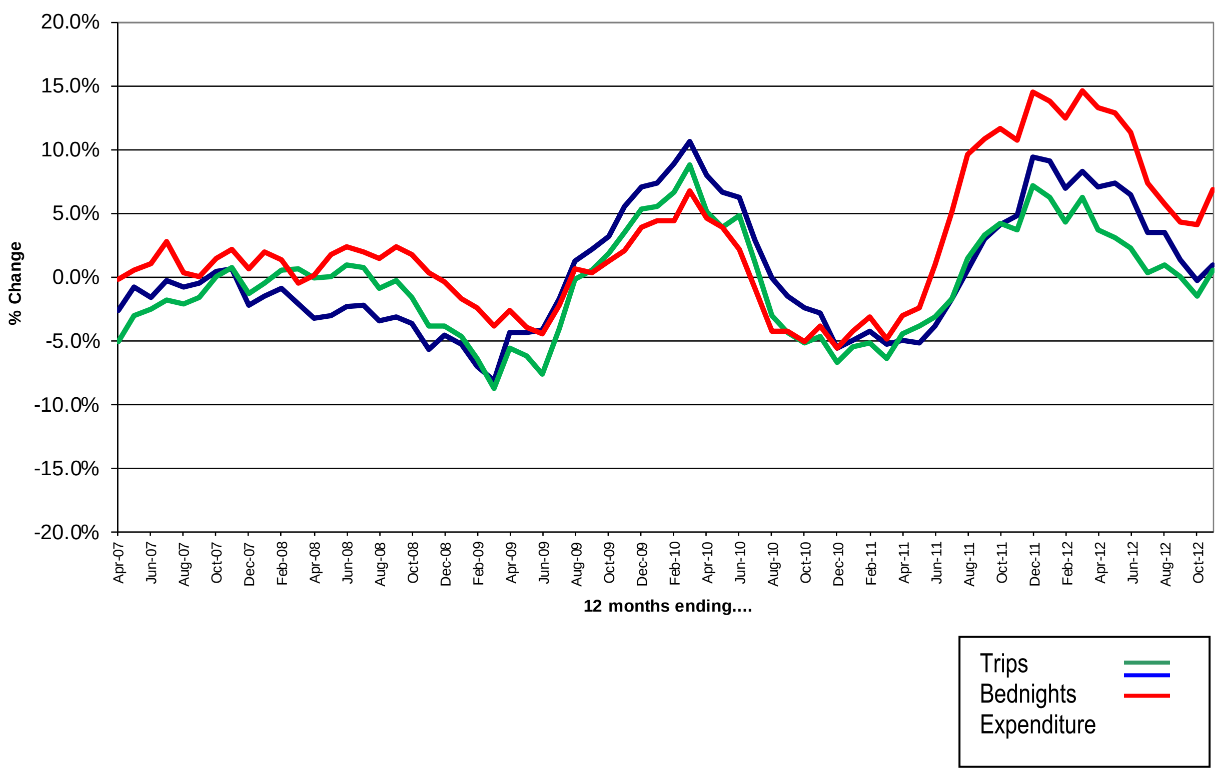
	TRIPS (MILLIONS)			SPEND (£BN)		
	2011	**2012**	**% +/-**	**2011**	**2012**	**% +/-**
November	3.3	3.4	**+1%**	1.8	1.9	**+3%**
January-November	53.7	53.5	**0%**	30.0	30.9	**+3%**
Dec '11 – Nov '12	56.4	56.7	**0%**	31.5	32.6	**+4%**

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 2011 vs. November 2012)
- Year to date (January–November 2011 vs. January– November 2012)
- 12 month rolling (October 2010 – November 2011 vs. October 2011– November 2012)

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, 2011

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 performace' 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: November 2012			Unweighted	YTD: January - November 2012			Unweighted	12 month rolling December 2011 - November 2012			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	30.8%	45.8%	50.0%	1062	-1.4%	-1.3%	5.0%	16224	1.0%	0.7%	6.9%	17442
PURPOSE:												
Pure Holiday	32.5%	35.9%	54.5%	351	-1.7%	-3.5%	4.5%	8079	-0.1%	-2.4%	5.6%	8384
- 1-3 nights holiday	32.2%	40.1%	56.3%	285	0.3%	-0.7%	9.1%	4954	2.4%	1.1%	11.0%	5177
- 4+ nights holiday	33.5%	29.3%	48.8%	66	-5.2%	-4.9%	0.2%	3125	-4.4%	-4.2%	0.3%	3207
VFR (on holiday)	73.5%	115.0%	140.3%	259	4.5%	5.0%	11.5%	3121	10.0%	10.5%	15.9%	3629
HOLIDAY (TOTAL)	46.5%	61.3%	71.2%	610	-0.1%	-1.6%	5.6%	11200	2.7%	0.8%	7.3%	12013
VFR (non-holiday)	8.3%	13.0%	50.0%	217	-11.2%	-6.8%	1.6%	2528	-8.5%	-5.3%	3.6%	2837
VFR (TOTAL)	34.5%	54.4%	86.6%	476	-3.2%	-0.2%	7.1%	5649	0.9%	3.6%	10.5%	6467
Business	15.3%	28.6%	17.9%	185	1.6%	5.9%	1.9%	1987	2.1%	6.7%	3.8%	2062
Regions:												
West Midlands	20.5%	31.9%	69.2%	71	1.4%	6.8%	6.9%	1022	3.3%	8.1%	5.5%	1129
East of England	71.2%	65.4%	117.4%	101	-6.1%	0.2%	14.3%	1271	-3.9%	3.4%	15.5%	1380
East Midlands	53.2%	120.0%	58.4%	78	-6.9%	-8.0%	-1.8%	1075	-4.8%	-6.7%	0.9%	1150
London	41.1%	27.8%	102.5%	120	8.3%	1.6%	13.4%	1446	10.3%	6.9%	13.7%	1580
North West	18.3%	33.8%	51.4%	124	1.8%	2.1%	9.7%	1868	3.5%	2.8%	15.0%	1981
North East	-3.9%	-28.6%	-21.7%	32	-0.7%	-6.2%	12.1%	562	0.0%	-2.8%	14.1%	594
South East	32.6%	56.1%	35.0%	157	4.3%	2.6%	11.4%	2234	7.8%	6.0%	12.6%	2424
South West	28.7%	64.6%	35.9%	143	-3.8%	-1.6%	2.1%	2692	-2.6%	-1.3%	2.8%	2845
Yorkshire & the Humber	5.6%	27.1%	48.2%	88	-2.3%	-3.0%	8.5%	1452	1.9%	-0.5%	8.9%	1577
LOCATION TYPE:												
Seaside	16.2%	35.8%	36.4%	151	-2.8%	-2.8%	4.1%	3619	-1.5%	-1.2%	5.0%	3731
Large city/ large town	18.7%	37.7%	38.5%	472	1.3%	2.9%	6.7%	6166	4.1%	5.9%	9.1%	6744
Small town	65.7%	65.9%	102.8%	277	1.0%	-0.5%	7.9%	3830	3.5%	1.2%	10.0%	4168
Countryside/ village	38.6%	52.8%	48.6%	184	-4.9%	-5.5%	-0.3%	3047	-3.1%	-4.5%	1.2%	3257
AGE:												
16-24	15.2%	46.7%	50.4%	145	-6.5%	-2.2%	2.3%	1887	-5.5%	-2.3%	1.9%	2038
25-34	17.5%	15.9%	53.6%	169	6.8%	5.8%	17.4%	2890	7.7%	8.0%	17.6%	3115
35-44	5.6%	16.4%	18.3%	179	-13.6%	-9.6%	-8.8%	3323	-9.7%	-7.4%	-5.4%	3598
45-54	82.3%	91.3%	100.9%	192	8.3%	3.8%	12.7%	2976	9.7%	5.3%	14.1%	3149
55+	39.5%	57.1%	46.9%	377	0.1%	-1.2%	5.7%	5148	3.2%	1.6%	8.1%	5543
SEG:												
AB	36.4%	43.6%	68.0%	376	0.7%	3.8%	8.8%	5404	2.8%	5.2%	11.0%	5813
C1	11.7%	33.0%	24.8%	318	-5.4%	-4.1%	-1.9%	4938	-2.8%	-2.2%	-0.6%	5341
C2	43.4%	43.7%	36.3%	194	2.5%	-2.9%	5.0%	2903	5.0%	-0.1%	7.1%	3088
DE	54.0%	95.1%	97.0%	175	-2.5%	-5.3%	10.9%	2979	-0.1%	-2.7%	13.6%	3200
CHILDREN IN H/H:												
Any	25.0%	37.8%	36.5%	314	-2.8%	-1.3%	5.2%	5839	-0.3%	-1.0%	7.3%	6289
None	32.9%	48.4%	55.0%	748	-0.7%	-1.3%	4.9%	10385	1.6%	1.5%	6.7%	11152
ACCOMMODATION:												
Commercial accom	41.3%	54.8%	50.6%	625	2.1%	-0.4%	6.4%	10047	3.4%	0.6%	8.0%	10424
- Serviced accom	27.5%	41.2%	39.3%	498	4.5%	5.9%	8.5%	6739	6.6%	7.9%	11.3%	7104
- Hotel/motel/guesthouse	30.8%	41.2%	39.9%	458	3.9%	4.7%	7.4%	5965	5.9%	6.7%	10.2%	6306
- Bed & Breakfast	5.1%	37.8%	44.0%	40	12.3%	14.9%	23.3%	728	15.1%	17.6%	25.6%	750
Total self-catering rented	83.5%	73.7%	89.8%	87	-3.5%	-6.5%	0.3%	3042	-3.9%	-6.7%	-0.7%	3040
-Camping & Caravanning (inc. owned caravans)	29.2%	12.7%	59.6%	40	-6.9%	-3.4%	-1.8%	2234	-7.3%	-3.8%	-2.4%	2203
-Other self-catering rented	113.4%	135.0%	105.8%	55	1.6%	-6.3%	1.7%	1273	0.9%	-6.5%	0.3%	1293
Hostels	1723.1%	1683.3%	2200.0%	24	18.0%	15.1%	48.4%	205	12.9%	16.0%	37.4%	206
Own home/friends'/relatives'	16.2%	32.4%	50.5%	422	-6.1%	-2.4%	-1.5%	6010	-1.9%	1.3%	1.8%	6840

Comparisons with equivalent periods, 2011

England

	Month: November 2012			Unweighted	YTD: January - November 2012			Unweighted	12 month rolling December 2011 - November 2012			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	29.5%	47.0%	54.6%	901	-0.9%	-0.5%	8.0%	13418	1.4%	1.5%	9.4%	14426
PURPOSE:												
Pure Holiday	28.0%	32.0%	55.2%	286	-1.1%	-2.2%	8.6%	6418	0.1%	-1.5%	9.1%	6660
- 1-3 nights holiday	26.8%	33.5%	54.8%	237	-0.3%	-2.2%	11.3%	3991	1.3%	-0.8%	12.6%	4171
- 4+ nights holiday	35.7%	29.0%	57.0%	48	-2.6%	-2.3%	5.8%	2420	-2.2%	-1.8%	5.3%	2482
VFR (on holiday)	65.0%	120.5%	132.7%	218	3.2%	1.9%	10.3%	2639	9.7%	8.7%	15.6%	3076
HOLIDAY (TOTAL)	41.2%	60.8%	70.9%	504	0.1%	-1.2%	8.9%	9055	2.9%	1.2%	10.2%	9736
VFR (non-holiday)	3.8%	4.6%	38.8%	188	-8.9%	-4.4%	1.9%	2245	-6.4%	-3.0%	3.8%	2513
VFR (TOTAL)	28.2%	49.4%	76.4%	406	-2.8%	-0.9%	6.5%	4886	1.8%	3.6%	10.4%	5590
Business	27.5%	47.7%	34.6%	164	1.2%	8.4%	5.1%	1667	1.1%	8.9%	5.9%	1715
Regions:												
West Midlands	20.5%	31.9%	69.2%	71	1.4%	6.8%	6.9%	1022	3.3%	8.1%	5.5%	1129
East of England	71.2%	65.4%	117.4%	101	-6.1%	0.2%	14.3%	1271	-3.9%	3.4%	15.5%	1380
East Midlands	53.2%	120.0%	58.4%	78	-6.9%	-8.0%	-1.8%	1075	-4.8%	-6.7%	0.9%	1150
London	41.1%	27.8%	102.5%	120	8.3%	1.6%	13.4%	1446	10.3%	6.9%	13.7%	1580
North West	18.3%	33.8%	51.4%	124	1.8%	2.1%	9.7%	1868	3.5%	2.8%	15.0%	1981
North East	-3.9%	-28.6%	-21.7%	32	-0.7%	-6.2%	12.1%	562	0.0%	-2.8%	14.1%	594
South East	32.6%	56.1%	35.0%	157	4.3%	2.6%	11.4%	2234	7.8%	6.0%	12.6%	2424
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Yorkshire & the Humber	5.6%	27.1%	48.2%	88	-2.3%	-3.0%	8.5%	1452	1.9%	-0.5%	8.9%	1577
LOCATION TYPE:												
Seaside	29.9%	52.8%	66.0%	126	-2.5%	0.7%	7.1%	2911	-1.2%	2.3%	7.3%	3007
Large city/ large town	16.0%	35.4%	36.9%	406	1.1%	2.4%	8.1%	5297	3.6%	5.4%	10.4%	5777
Small town	71.1%	74.5%	118.3%	243	2.1%	-0.1%	10.8%	3086	4.6%	2.1%	12.3%	3355
Countryside/ village	19.6%	37.4%	40.8%	141	-4.5%	-6.2%	6.3%	2442	-2.4%	-5.4%	7.1%	2625
AGE:												
16-24	24.4%	70.7%	63.0%	134	-5.1%	-0.7%	7.5%	1621	-4.2%	-0.3%	6.6%	1747
25-34	6.1%	0.9%	34.3%	142	9.0%	8.2%	18.2%	2424	9.6%	10.1%	17.7%	2606
35-44	1.6%	21.9%	31.1%	138	-12.4%	-8.9%	-2.6%	2772	-9.4%	-6.9%	-0.1%	2984
45-54	92.6%	94.4%	125.9%	170	8.3%	8.4%	16.4%	2433	10.5%	10.1%	17.6%	2586
55+	35.6%	54.1%	45.0%	317	-1.0%	-3.0%	5.9%	4166	2.3%	-0.1%	8.2%	4502
SEG:												
AB	36.5%	48.2%	72.1%	330	0.2%	3.5%	12.1%	4488	2.1%	5.0%	14.2%	4819
C1	9.0%	29.5%	29.9%	267	-4.7%	-4.1%	0.1%	4118	-2.0%	-2.1%	0.6%	4459
C2	45.0%	48.3%	38.9%	159	1.7%	-1.4%	7.6%	2339	4.5%	1.7%	8.4%	2491
DE	49.2%	98.0%	103.8%	143	1.9%	-1.1%	17.0%	2470	3.7%	1.3%	20.1%	2656
CHILDREN IN H/H:												
Any	30.5%	56.1%	60.4%	270	-1.0%	1.2%	9.8%	4860	1.1%	1.0%	10.8%	5233
None	29.2%	44.4%	52.6%	632	-0.9%	-1.3%	7.3%	8564	1.5%	1.8%	8.9%	9198
ACCOMMODATION:												
Commercial accom	39.4%	54.6%	55.2%	517	2.8%	2.0%	9.5%	8190	3.9%	2.8%	10.6%	8493
- Serviced accom	28.6%	43.6%	44.9%	421	4.4%	5.9%	10.4%	5588	5.9%	7.3%	12.2%	5879
- Hotel/motel/guesthouse	30.8%	41.7%	42.6%	387	3.7%	4.4%	8.5%	4956	5.1%	5.9%	10.6%	5228
- Bed & Breakfast	23.2%	67.5%	89.8%	36	14.9%	20.6%	32.1%	602	16.9%	22.2%	32.6%	621
Total self-catering rented	62.0%	62.8%	89.1%	65	-0.7%	-1.8%	6.2%	2395	-0.8%	-1.7%	5.3%	2394
-Camping & Caravanning (inc. owned caravans)	6.5%	-9.0%	42.9%	27	-6.3%	-2.7%	1.3%	1715	-6.1%	-2.7%	1.3%	1697
-Other self-catering rented	100.5%	153.2%	121.4%	43	8.0%	-0.3%	10.0%	995	6.9%	-0.3%	8.3%	1007
Hostels	1115.4%	1162.5%	1600.0%	16	7.0%	14.2%	53.5%	143	0.9%	9.7%	37.8%	143
Own home/friends'/relatives'	16.7%	34.0%	54.8%	368	-5.7%	-3.7%	1.0%	5072	-1.2%	0.5%	4.3%	5785