VisitEngland

GB TOURISM SURVEY - October 2012
SUMMARY OF RESULTS

1. Headlines

- There were 10.1 million domestic overnight trips in Great Britain in October. This represents a fall of 9% from the all-time high October 2011 figure of 11.1 million.
- The number of bednights is also down by 11%, although positively spend is up by 4%.
- Looking at England alone, the volume of trips decreased by 10% (from 9.0 million in 2011 to 8.2 million in 2012), with bednights decreasing by 12%. However, spend was up by 9%.
- In the year to date (January to October), the number of trips and nights in GB has decreased (both by 4%), while expenditure was up by 2% on 2011.
- In the past 12 months, the number of trips taken in Great Britain compared with the same period the year before has remained flat.

2. Context

- The average temperature in October was the coldest since October 2003, with snow accumulations in some parts of the North East, and some Eastern and Southern counties experiencing wetter than average conditions.

3. Trip Characteristics

- Between January and October 2012, the number of holiday trips in Great Britain decreased by 3%, from 53.0 million to 51.2 million, with nights also down by 5%. Expenditure, however, saw an increase of 2%.
- This indicates that while people are taking fewer trips, the amount spent per night has increased and now stands at £62 (vs. £58 in 2011 and £54 in 2010).
- The number of longer holiday trips (4+ nights) taken has declined more steeply than shorter 1-3 night breaks (down 6% versus 2% for shorter breaks).
- The volume of trips and nights to visit friends and relatives (VFR) has also decreased so far this year (down 7% and 4% respectively), with spend showing a slight increase of 1%. This is driven particularly by non-leisure VFR – VFR for holiday travel has held steady.
- Business trips have remained flat so far this year, at 15.4 million, as has spend at £3.6 billion.
- Serviced accommodation is showing greater performance than self-catering accommodation (+2% versus -5%), with declines in camping and caravanning fuelling much of the decrease in trips involving self-catering accommodation (-7%).

4. Overseas Travel by UK Residents

- Trips abroad by UK residents saw a decrease in October compared to the same time last year (2%), with year to date trips remaining flat. The amount spent has also declined by 1% against 2011 levels. However, spend for the year to date is up by 4%.

5. Other Tourism Surveys

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

KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
October '12									
GB	11.1	10.1	-9%	30.9	27.4	-11%	1,847	1,923	+4%
England	9.0	8.2	-10%	24.3	21.4	-12%	1,430	1,563	+9%
Jan-Oct '12									
GB	107.6	103.6	-4%	337.7	325.1	-4%	19,662	20,060	+2%
England	88.3	85.5	-3%	266.3	258.1	-3%	15,508	16,246	+5%

Purpose of Trip – October 2012

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	4.8	4.6	-4%	15.0	13.8	-8%	967	1,073	+11%
Business	2.0	1.8	-9%	4.8	3.8	-21%	447	386	-14%
VFR	3.8	3.4	-12%	10.2	9.3	-9%	384	418	+9%
England									
Holiday	3.9	3.7	-4%	11.5	10.4	-9%	757	866	+14%
Business	1.6	1.4	-13%	3.8	2.8	-26%	327	312	-5%
VFR	3.2	2.9	-10%	8.2	7.8	-5%	307	350	+14%

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

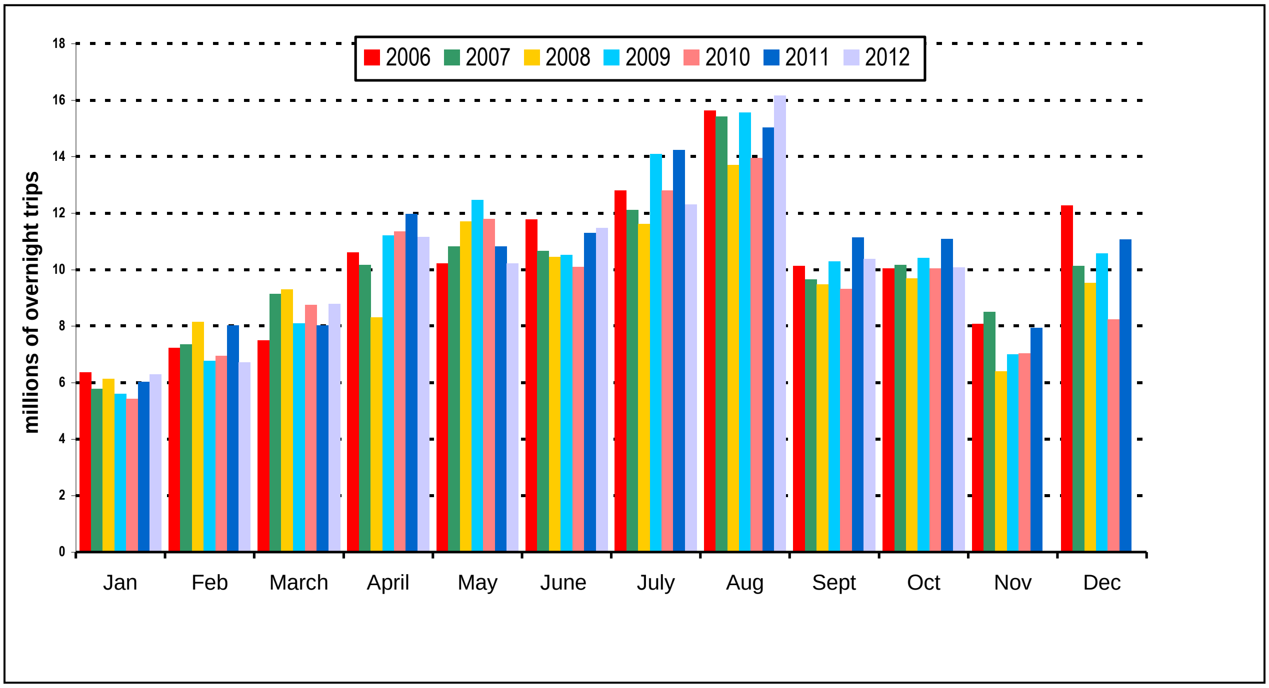
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	53.0	51.2	-3%	194.9	185.8	-5%	11,807	12,087	+2%
Business	15.4	15.4	0%	35.3	36.5	+3%	3,663	3,661	0%
VFR	35.9	33.5	-7%	97.3	93.4	-4%	3,759	3,783	+1%
England									
Holiday	41.7	40.6	-3%	147.3	142.3	-3%	9,049	9,626	+6%
Business	13.1	12.8	-2%	28.9	30.1	+4%	3,001	3,053	+2%
VFR	30.8	29.0	-6%	81.4	77.7	-5%	3,105	3,119	+1%

Outbound Travel – UK Residents

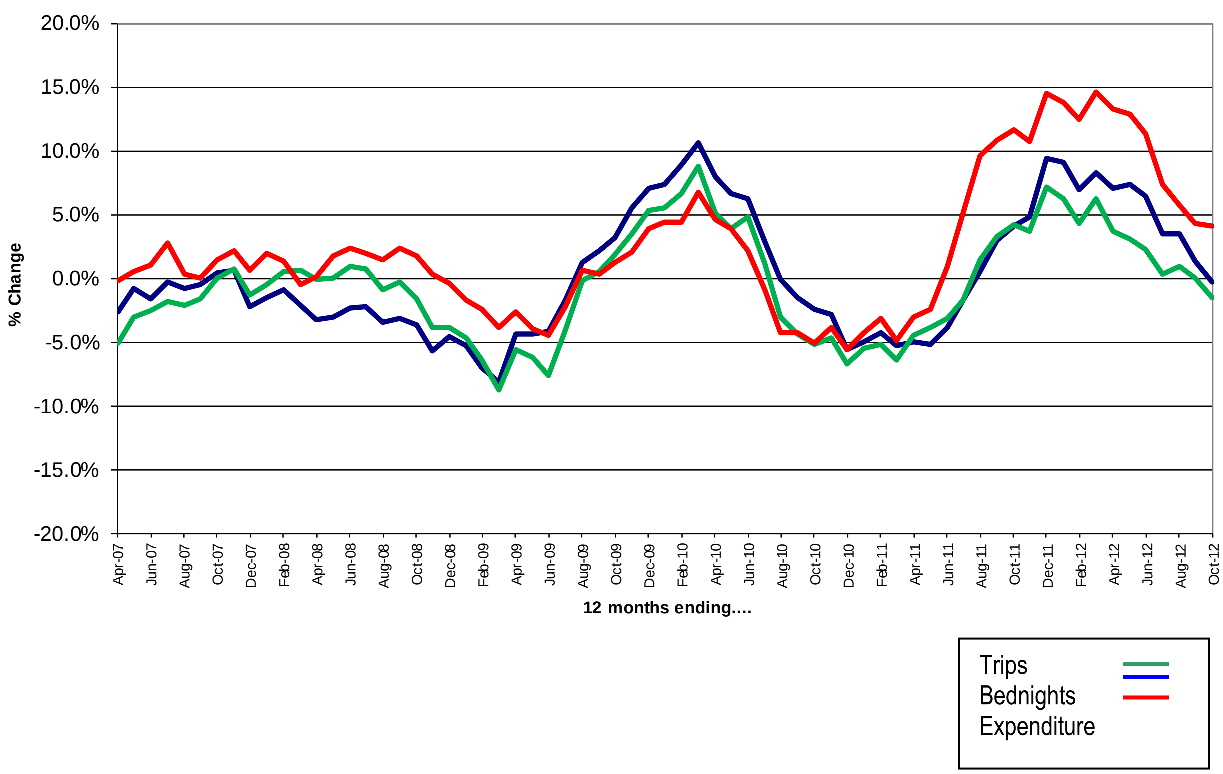
	TRIPS (MILLIONS)			SPEND (£BN)		
	2011	**2012**	**% +/-**	**2011**	**2012**	**% +/-**
October	5.2	5.1	-2%	2.8	2.8	-1%
January-October	50.4	50.3	0%	28.2	29.3	+4%
Nov '11 – Oct '12	56.4	56.8	+1%	31.4	32.9	+5%

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 2011 vs. October 2012)
- Year to date (January–October 2011 vs. January– October 2012)
- 12 month rolling (November 2010 – October 2011 vs. November 2011– October 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: October 2012			Unweighted	YTD: January - October 2012			Unweighted	2 month rolling November 2011 - October 201			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	-9.1%	-11.4%	4.1%	1403	-3.8%	-3.7%	2.0%	15162	-0.3%	-1.4%	4.1%	17294
PURPOSE:												
Pure Holiday	-4.0%	-7.7%	11.0%	665	-3.3%	-4.7%	2.4%	7728	-1.4%	-3.6%	3.4%	8336
- 1-3 nights holiday	4.3%	9.7%	21.9%	465	-1.7%	-3.0%	5.9%	4669	1.0%	-0.7%	7.5%	5145
- 4+ nights holiday	-20.1%	-18.8%	-2.5%	200	-5.9%	-5.5%	-0.8%	3059	-5.4%	-5.1%	-0.6%	3191
VFR (on holiday)	8.2%	2.8%	17.6%	296	-0.3%	-0.4%	4.0%	2862	6.3%	4.5%	5.9%	3539
HOLIDAY (TOTAL)	-0.7%	-5.0%	12.1%	962	-2.5%	-3.7%	2.6%	10590	0.8%	-1.6%	3.8%	11875
VFR (non-holiday)	-29.4%	-21.8%	-0.6%	215	-13.3%	-8.7%	-3.8%	2311	-7.8%	-5.3%	2.0%	2842
VFR (TOTAL)	-11.9%	-9.1%	8.9%	512	-6.6%	-4.0%	0.6%	5173	-0.5%	0.3%	4.2%	6381
Business	-8.9%	-20.7%	-13.6%	185	-0.2%	3.4%	-0.1%	1802	1.8%	4.6%	2.9%	2067
Regions:												
West Midlands	-7.5%	-23.2%	0.0%	89	-0.3%	5.0%	1.8%	951	1.8%	5.5%	1.7%	1130
East of England	-15.1%	-11.6%	9.1%	107	-11.1%	-2.9%	8.9%	1170	-7.4%	0.6%	8.8%	1346
East Midlands	-17.7%	-29.1%	-23.3%	82	-11.0%	-13.5%	-5.8%	998	-5.8%	-10.3%	0.5%	1136
London	-6.1%	-13.8%	10.8%	133	5.1%	-0.6%	6.3%	1326	5.4%	4.0%	3.6%	1560
North West	-1.7%	-8.0%	2.1%	197	0.6%	0.2%	6.8%	1744	2.4%	0.7%	11.4%	1964
North East	-18.6%	-25.8%	3.2%	46	-0.4%	-4.7%	15.7%	530	2.4%	-0.7%	20.9%	594
South East	-5.9%	-19.7%	27.9%	170	1.7%	-0.9%	9.2%	2078	6.7%	2.7%	12.3%	2402
South West	-2.6%	18.0%	13.2%	212	-5.6%	-3.9%	0.6%	2549	-3.4%	-3.1%	0.4%	2825
Yorkshire & the Humber	-19.7%	-29.2%	13.6%	129	-3.0%	-4.8%	5.3%	1364	4.4%	-0.4%	7.5%	1578
LOCATION TYPE:												
Seaside	-10.0%	-15.6%	2.0%	275	-3.8%	-4.2%	2.6%	3468	-0.7%	-1.4%	3.8%	3719
Large city/ large town	-4.6%	-11.3%	10.9%	583	-0.4%	0.2%	3.7%	5694	3.7%	3.5%	6.8%	6728
Small town	-11.8%	-1.1%	6.3%	336	-3.4%	-3.9%	2.8%	3553	-0.8%	-3.3%	3.3%	4091
Countryside/ village	-13.9%	-17.4%	-11.7%	235	-7.4%	-7.8%	-2.7%	2863	-4.3%	-6.2%	0.1%	3209
AGE:												
16-24	-7.4%	-23.5%	8.5%	187	-8.5%	-5.4%	-1.1%	1742	-5.7%	-4.8%	-0.8%	2049
25-34	-14.4%	-28.9%	-8.7%	220	5.9%	5.2%	14.5%	2721	7.4%	7.2%	13.0%	3113
35-44	-14.0%	-4.7%	5.5%	290	-14.9%	-10.7%	-10.8%	3144	-9.0%	-7.4%	-5.5%	3601
45-54	3.5%	-2.8%	3.4%	271	4.1%	0.3%	8.3%	2783	4.5%	0.3%	7.8%	3073
55+	-11.6%	-7.7%	8.0%	435	-3.0%	-4.3%	2.9%	4771	1.7%	-0.8%	6.4%	5457
SEG:												
AB	-11.5%	-1.7%	13.8%	422	-2.0%	1.7%	5.0%	5029	1.2%	3.4%	6.3%	5720
C1	-13.9%	-15.6%	-12.6%	443	-6.8%	-6.2%	-3.7%	4620	-2.6%	-3.9%	-1.7%	5357
C2	-9.6%	-26.0%	-3.5%	259	-0.4%	-5.4%	2.6%	2709	2.7%	-1.8%	6.6%	3045
DE	13.4%	-5.1%	31.3%	278	-5.8%	-9.0%	6.9%	2804	-2.6%	-6.9%	9.6%	3172
CHILDREN IN H/H:												
Any	-11.5%	-18.5%	4.9%	502	-4.5%	-2.8%	3.2%	5525	-0.8%	-2.0%	6.9%	6252
None	-7.8%	-8.0%	3.7%	901	-3.4%	-4.2%	1.5%	9636	-0.1%	-1.2%	3.1%	11042
ACCOMMODATION:												
Commercial accom	-9.0%	-10.1%	6.3%	832	-0.5%	-2.9%	3.6%	9436	1.4%	-1.5%	5.1%	10290
- Serviced accom	-7.3%	-4.7%	2.1%	628	2.4%	3.1%	5.8%	6216	5.4%	5.6%	8.5%	7036
- Hotel/motel/guesthouse	-10.1%	-7.8%	-2.3%	560	1.4%	1.8%	4.5%	5478	4.3%	4.2%	7.1%	6228
- Bed & Breakfast	15.9%	23.3%	70.9%	60	12.9%	12.9%	21.2%	691	17.7%	18.0%	25.6%	756
Total self-catering rented	-5.0%	-16.7%	19.0%	193	-5.3%	-7.9%	-1.6%	3003	-5.8%	-8.0%	-2.9%	3020
-Camping & Caravanning (inc. owned caravans)	-13.9%	-25.5%	-17.1%	141	-7.6%	-3.7%	-3.0%	2239	-7.3%	-3.0%	-2.9%	2215
-Other self-catering rented	23.2%	11.6%	55.1%	107	-1.7%	-9.2%	-0.8%	1230	-3.3%	-10.0%	-3.0%	1267
Hostels	-43.9%	-22.2%	7.1%	15	-0.4%	2.2%	24.7%	176	-9.4%	-0.1%	11.9%	176
Own home/friends'/relatives'	-5.4%	-5.8%	2.8%	566	-8.0%	-4.6%	-5.4%	5575	-1.7%	-0.7%	-0.6%	6835

Comparisons with equivalent periods, 2011

England

	Month: October 2012			Unweighted	YTD: January - October 2012			Unweighted	2 month rolling November 2011 - October 201			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	-9.6%	-11.7%	9.3%	1138	-3.3%	-3.1%	4.8%	12507	0.2%	-0.5%	6.3%	14306
PURPOSE:												
Pure Holiday	-4.3%	-9.0%	14.4%	528	-2.6%	-3.3%	6.4%	6129	-0.9%	-2.4%	6.9%	6630
- 1-3 nights holiday	4.1%	9.6%	26.7%	378	-2.1%	-4.4%	7.9%	3751	0.3%	-2.1%	9.1%	4153
- 4+ nights holiday	-21.6%	-21.8%	-1.8%	148	-3.4%	-2.8%	4.8%	2373	-3.2%	-2.5%	4.4%	2470
VFR (on holiday)	12.1%	4.3%	26.5%	250	-1.3%	-3.9%	2.8%	2421	6.6%	3.3%	5.5%	3009
HOLIDAY (TOTAL)	0.2%	-5.5%	16.4%	778	-2.2%	-3.5%	5.8%	8547	1.3%	-0.9%	6.6%	9638
VFR (non-holiday)	-27.9%	-15.3%	1.3%	189	-10.4%	-5.4%	-2.7%	2060	-5.4%	-1.9%	3.4%	2528
VFR (TOTAL)	-9.8%	-5.3%	14.0%	440	-5.7%	-4.6%	0.5%	4481	0.7%	1.0%	4.6%	5538
Business	-13.3%	-25.5%	-4.6%	143	-2.0%	4.2%	1.7%	1499	-0.5%	4.4%	2.6%	1699
Regions:												
West Midlands	-7.5%	-23.2%	0.0%	89	-0.3%	5.0%	1.8%	951	1.8%	5.5%	1.7%	1130
East of England	-15.1%	-11.6%	9.1%	107	-11.1%	-2.9%	8.9%	1170	-7.4%	0.6%	8.8%	1346
East Midlands	-17.7%	-29.1%	-23.3%	82	-11.0%	-13.5%	-5.8%	998	-5.8%	-10.3%	0.5%	1136
London	-6.1%	-13.8%	10.8%	133	5.1%	-0.6%	6.3%	1326	5.4%	4.0%	3.6%	1560
North West	-1.7%	-8.0%	2.1%	197	0.6%	0.2%	6.8%	1744	2.4%	0.7%	11.4%	1964
North East	-18.6%	-25.8%	3.2%	46	-0.4%	-4.7%	15.7%	530	2.4%	-0.7%	20.9%	594
South East	-5.9%	-19.7%	27.9%	170	1.7%	-0.9%	9.2%	2078	6.7%	2.7%	12.3%	2402
South West	-2.6%	18.0%	13.2%	212	-5.6%	-3.9%	0.6%	2549	-3.4%	-3.1%	0.4%	2825
Yorkshire & the Humber	-19.7%	-29.2%	13.6%	129	-3.0%	-4.8%	5.3%	1364	4.4%	-0.4%	7.5%	1578
LOCATION TYPE:												
Seaside	-8.9%	-11.6%	9.3%	223	-4.0%	-1.0%	4.8%	2782	-1.4%	1.3%	4.5%	2980
Large city/ large town	-5.5%	-13.5%	17.7%	485	-0.4%	-0.2%	5.2%	4890	3.5%	3.2%	8.4%	5773
Small town	-11.5%	8.5%	11.0%	271	-2.9%	-4.3%	4.5%	2834	-0.3%	-2.1%	4.3%	3275
Countryside/ village	-17.6%	-28.3%	-13.5%	179	-6.1%	-8.1%	4.4%	2303	-2.3%	-6.4%	6.4%	2610
AGE:												
16-24	-3.9%	-25.1%	22.5%	167	-7.9%	-5.4%	3.3%	1483	-5.1%	-3.7%	3.7%	1743
25-34	-12.0%	-24.8%	0.0%	186	9.3%	8.7%	16.6%	2282	10.6%	10.4%	15.0%	2622
35-44	-17.9%	-6.1%	13.1%	222	-13.4%	-10.2%	-4.7%	2639	-8.4%	-7.2%	-1.6%	2995
45-54	7.3%	1.0%	11.2%	222	3.4%	4.7%	10.8%	2257	4.6%	5.1%	9.8%	2509
55+	-15.2%	-10.6%	6.1%	343	-4.0%	-6.3%	2.9%	3843	1.0%	-2.4%	6.7%	4436
SEG:												
AB	-15.2%	-7.3%	14.5%	339	-2.7%	0.9%	7.9%	4152	0.7%	3.1%	9.2%	4735
C1	-12.0%	-9.9%	-0.5%	362	-5.8%	-6.0%	-2.0%	3850	-1.6%	-3.4%	-1.1%	4480
C2	-11.0%	-26.2%	-0.8%	204	-1.4%	-4.1%	5.2%	2179	1.9%	-0.2%	8.0%	2453
DE	17.4%	-6.8%	32.3%	234	-1.0%	-4.8%	12.6%	2327	1.1%	-3.0%	15.5%	2638
CHILDREN IN H/H:												
Any	-15.1%	-20.2%	4.8%	403	-2.8%	-0.9%	6.8%	4587	0.4%	-0.4%	8.9%	5188
None	-6.8%	-7.6%	11.3%	734	-3.5%	-4.1%	3.9%	7925	0.1%	-0.5%	5.3%	9121
ACCOMMODATION:												
Commercial accom	-6.9%	-5.6%	14.2%	683	0.3%	-0.6%	6.5%	7687	2.1%	0.8%	7.2%	8388
- Serviced accom	-6.7%	-0.7%	9.4%	522	2.2%	2.9%	7.3%	5148	4.6%	4.7%	8.7%	5816
- Hotel/motel/guesthouse	-9.8%	-4.8%	4.4%	467	1.2%	1.4%	5.5%	4546	3.5%	3.2%	7.0%	5162
- Bed & Breakfast	20.3%	44.8%	86.0%	51	14.1%	16.5%	27.1%	568	16.9%	19.3%	27.4%	619
Total self-catering rented	0.7%	-11.5%	29.3%	151	-2.2%	-3.1%	4.2%	2371	-1.9%	-2.3%	3.7%	2387
-Camping & Caravanning (inc. owned caravans)	-10.9%	-26.4%	-20.0%	104	-6.6%	-2.6%	0.3%	1726	-5.7%	-1.2%	1.4%	1714
-Other self-catering rented	29.4%	15.2%	75.2%	85	4.9%	-3.6%	7.1%	963	3.8%	-3.7%	5.0%	988
Hostels	-37.2%	-24.9%	25.0%	13	-8.5%	1.6%	28.8%	124	-17.9%	-6.3%	10.7%	124
Own home/friends'/relatives'	-9.6%	-11.0%	-1.1%	461	-7.7%	-6.2%	-3.3%	4692	-1.3%	-1.4%	1.5%	5778