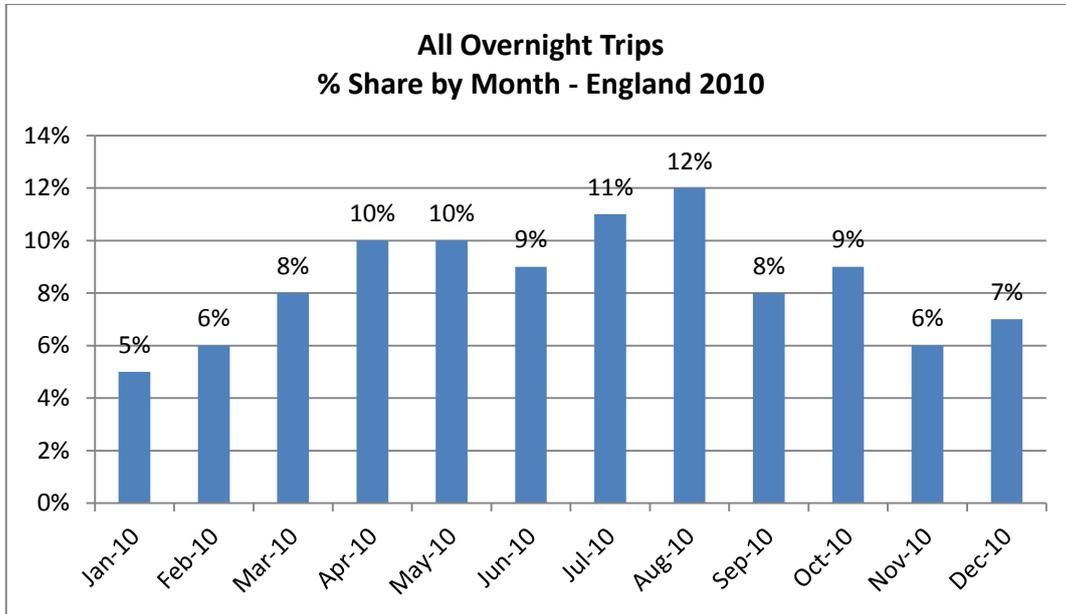


Seasonality in Domestic Overnight Tourism

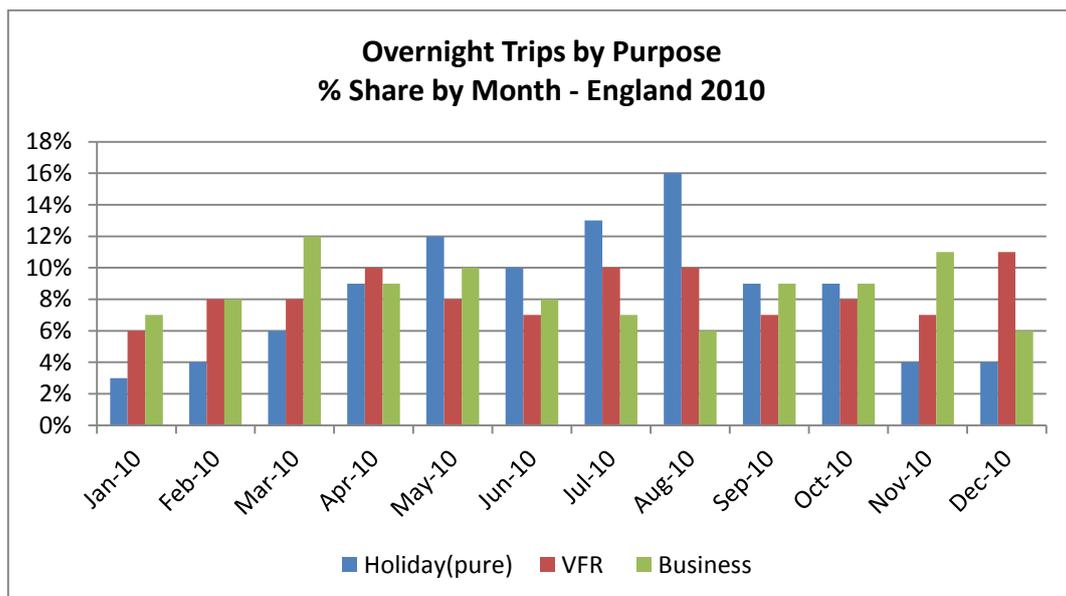
It is well known that travel behaviour is seasonal in nature, with reduced activity over the winter period and more trips taken in the summer months. The following analysis demonstrates the degree of this seasonality, looking at the share of trips taken in each month of the year, with comparisons made by trip purpose and by destination.

1. All Trips



The above chart shows the distribution of overnight trips in England (including all purposes – holiday, visiting friends and relatives (VFR) and business) over the course of 2010. While there is a clear seasonal pattern, this is perhaps not as pronounced as might be expected, with a relatively narrow degree of variation by month, ranging from 5% of trips taken in January to 12% of the total taken in August.

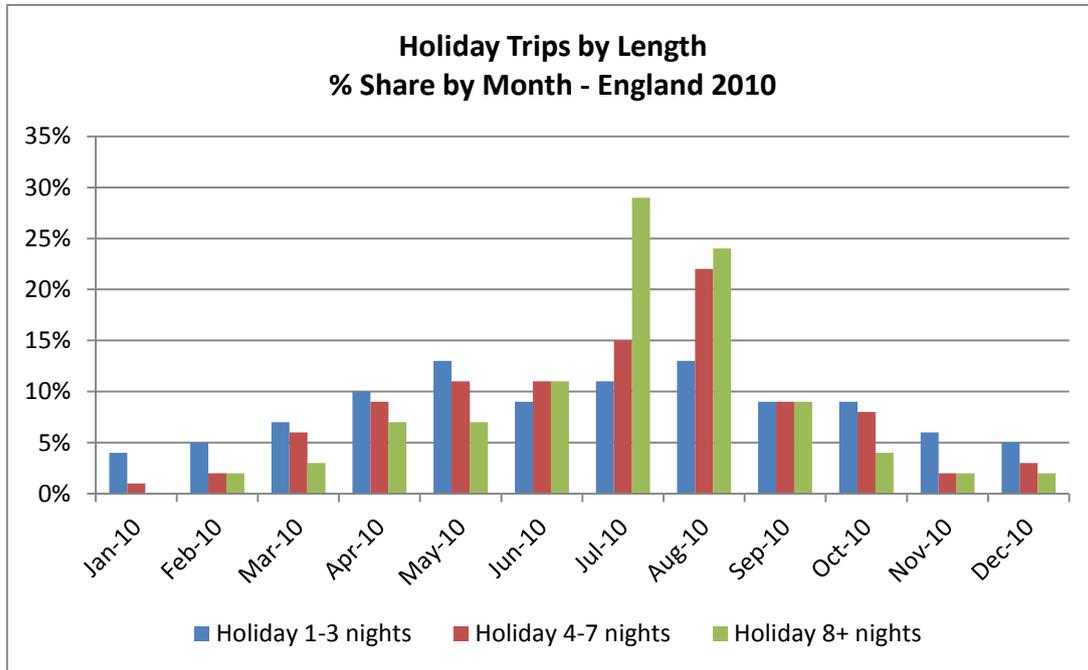
2. Trip Purpose



An analysis of trip patterns by purpose highlights some very different patterns. Holiday travel shows the greatest variation by month, with 16% of trips taken in August, compared to just 3% in January, and with the four months from May to August together generating half of all the holiday trips taken in England.

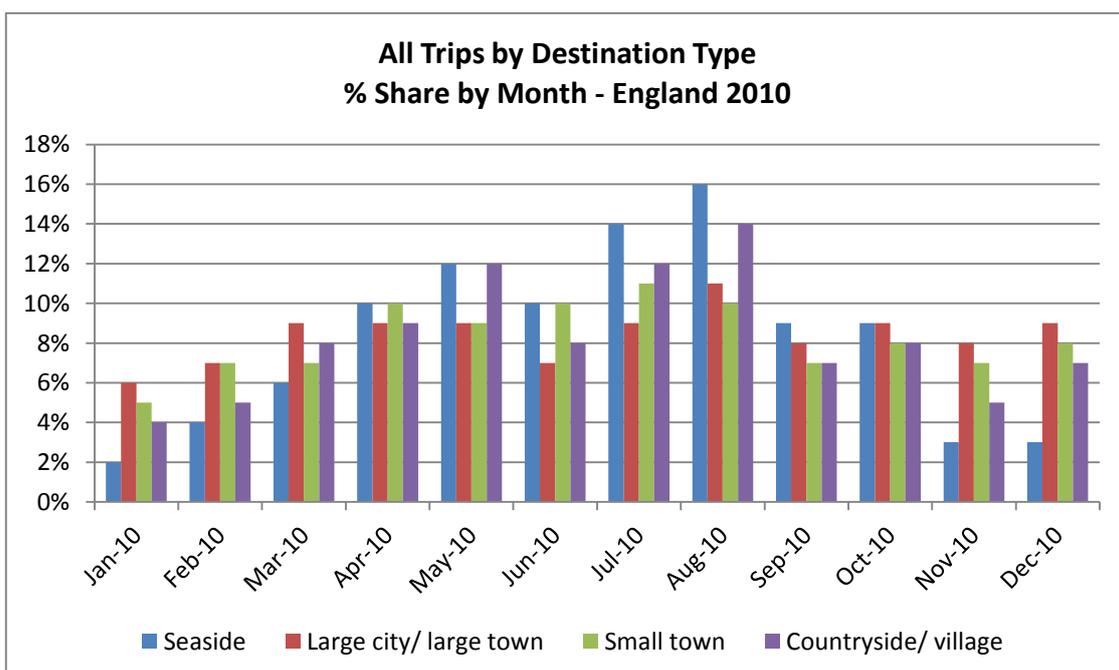
Business travel and trips to visit friends and relatives are spread more evenly throughout the year, though not surprisingly, business activity declines in the peak summer months and around Christmas, while these same months, but also April (the Easter holiday period) generate the highest shares of VFR travel.

3. Holiday Trips by Length



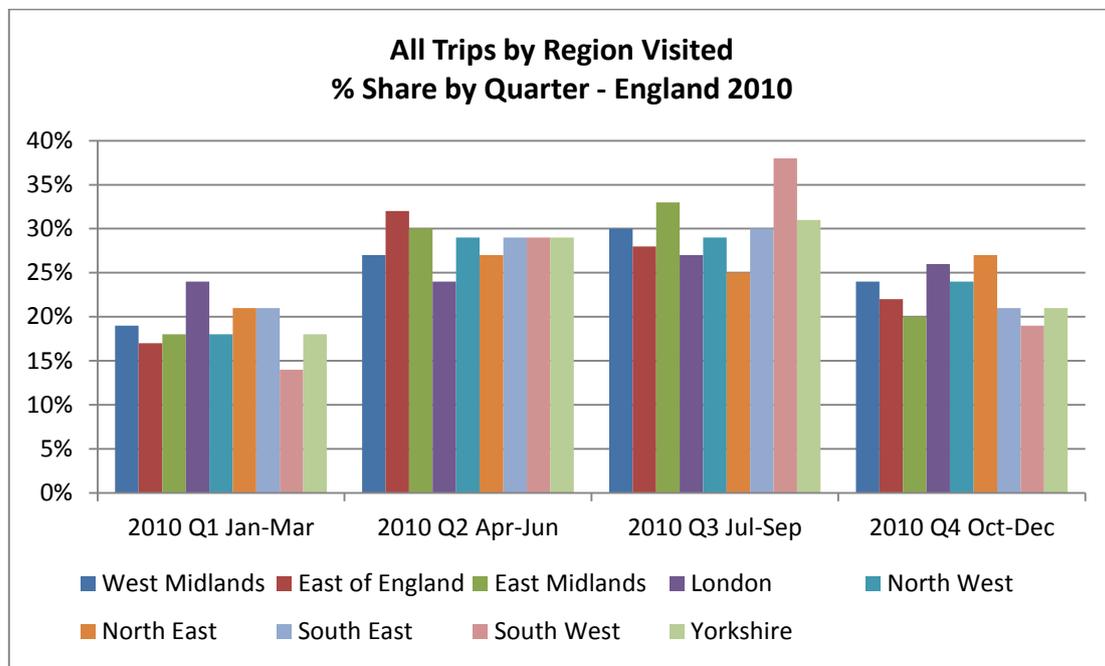
Within holiday travel, the degree of seasonality is dependent on trip length. The majority of short breaks (which account for 60% of all holiday trips taken in England) are taken in spring and summer, but as the above chart shows, a considerable amount of activity continues throughout the winter months. Longer breaks are much more concentrated around the peak summer holiday season, particularly the longest holidays of 8 or more nights.

4. Destination Type



Trends in seasonality by destination type reflect trip purpose trends. Seaside destinations, which tend to be heavily reliant on holiday travel, attract a high proportion of visitors during the summer months; the same is true of countryside destinations, though these are able to attract relatively more visitors outside the peak season. In contrast, trips to urban locations are spread more evenly throughout the year, reflecting the greater importance of business and VFR travel to these destinations.

5. Region Visited



The above analysis shows that most regions follow a broadly similar pattern of seasonality, though there are two notable exceptions. London attracts almost exactly 25% of its domestic visitors in each quarter of the year – reflecting both a higher proportion of business trips compared to other regions but also its many indoor attractions and activities; the South West by contrast is more reliant than other regions on summer trade, with a lower share of visitors than other regions in the first and fourth quarters of the year.

In Conclusion

As expected, the analysis of seasonality in domestic travel shows considerable variation by month of the year. Digging deeper, it can be seen that holiday travel, particularly for longer breaks, is considerably more concentrated in the peak summer months than other trip types, and this is also reflected in the seasonality profiles by destination type and by region.