

GB TOURISM SURVEY - September 2012

SUMMARY OF RESULTS

1. Headlines

- There were 10.4 million domestic overnight trips in Great Britain in September. Although this was a decrease of 7% from the all-time high of 11.1 million trips in 2011, it is the second highest volume recorded for September since the current survey began.
- Spend decreased by 1%, whilst the number of bednights increased by 1%.
- Looking at England alone, the volume of trips decreased by 6% (from 9.1 million in 2011 to 8.6 million in 2012), with spend increasing by 4% and the number of bednights by 3%.
- In the year to date (January to September), the number of trips and nights in GB has decreased (both by 3%), while expenditure was up by 2% on 2011.
- In the past 12 months, there were 1.7 million more trips taken in Great Britain compared with the same period the year before, an increase of 1%.

2. Context

- Although the weather in the first half of the month was generally fine and reasonably warm, the second half of the month was cooler than normal with heavy rainfall in many parts of the country, which created travel disruption and flooding.
- The Paralympic Games took place between the 29th of August and the 9th of September. This event may have affected trip-taking patterns.

3. Trip Characteristics

- Between January and September 2012, the number of holiday trips in Great Britain decreased by 3%, from 48.1 million to 46.5 million, with nights also down by 4%. Expenditure, however, saw an increase of 2%.
- The number of longer holiday trips (4+ nights) taken has declined more steeply than shorter 1-3 night breaks (down 5% 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 6% and 3%), with spend remaining flat.
- However, so far this year business trips have seen a slight increase from 13.5 million last year to 13.6 million this year (up 1%). Expenditure on business trips has also increased by 2%, and business nights are up by 7%, from 30.5 million to 32.7 million this year.
- Other than trips to large towns and cities, trips to all destination types have declined, particularly trips to the countryside, which is down 7%. Nevertheless, spend has shown slight increases (of 2-3%) for all destination types, apart from the countryside, where spend is down 2%.
- Trips by social grade DE have seen the greatest declines so far this year, down 8%. This compares with -1% for trips amongst social grade AB. There is also a wide variation by region, with London and the South East performing better than the East of England, the East Midlands and the South West in particular.

4. Overseas Travel by UK Residents

- Trips abroad by UK residents saw an increase in September compared to the same time last year (5%), with year to date trips remaining flat. The amount spent has remained above 2011 levels, up 8% in September and 5% for the year to date.

5. Other Tourism Surveys

- September results from the England Occupancy Survey saw a slight increase of 1% in room occupancy in serviced accommodation, with bedspace occupancy flat against August 2011.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
September '12									
GB	11.1	10.4	-7%	32.4	32.7	+1%	2,096	2,072	-1%
England	9.1	8.6	-6%	25.8	26.5	+3%	1,640	1,697	+4%
Jan-Sept '12									
GB	96.6	93.5	-3%	306.9	297.8	-3%	17,815	18,137	+2%
England	79.3	77.3	-3%	242.0	236.7	-2%	14,078	14,683	+4%

Purpose of Trip – September 2012

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	5.6	5.4	-4%	19.7	19.8	+1%	1,245	1,329	+7%
Business	1.5	1.3	-14%	3.7	3.0	-21%	371	249	-33%
VFR	3.7	3.3	-13%	8.5	8.8	+4%	435	423	-3%
England									
Holiday	4.5	4.4	-2%	15.5	16.0	+3%	945	1,090	+15%
Business	1.3	1.0	-21%	3.1	2.3	-26%	316	192	-39%
VFR	3.1	2.8	-10%	6.8	7.2	+5%	343	348	+2%

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

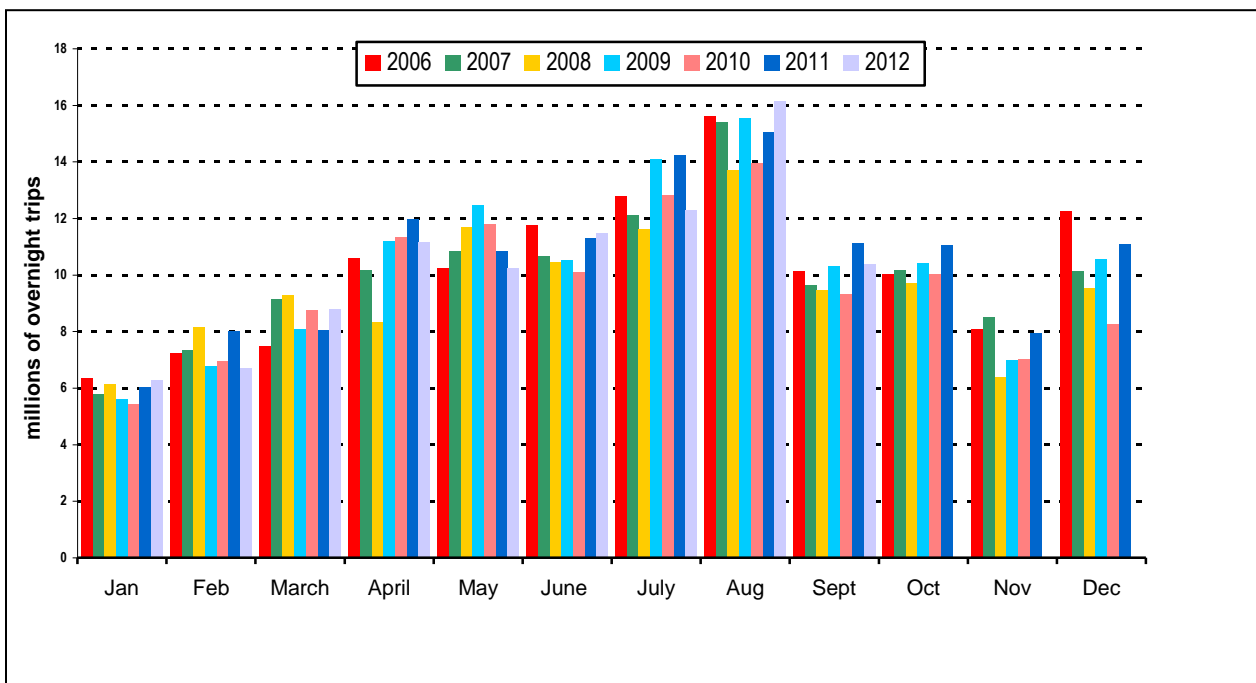
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	48.1	46.5	-3%	179.9	172.0	-4%	10,840	11,013	+2%
Business	13.5	13.6	+1%	30.5	32.7	+7%	3,216	3,275	+2%
VFR	32.1	30.1	-6%	87.1	84.1	-3%	3,376	3,365	0%
England									
Holiday	37.8	36.9	-2%	135.8	131.9	-3%	8,292	8,759	+6%
Business	11.5	11.4	-1%	25.1	27.3	+9%	2,674	2,741	+3%
VFR	27.6	26.1	-5%	73.2	70.0	-5%	2,798	2,768	-1%

Outbound Travel – UK Residents

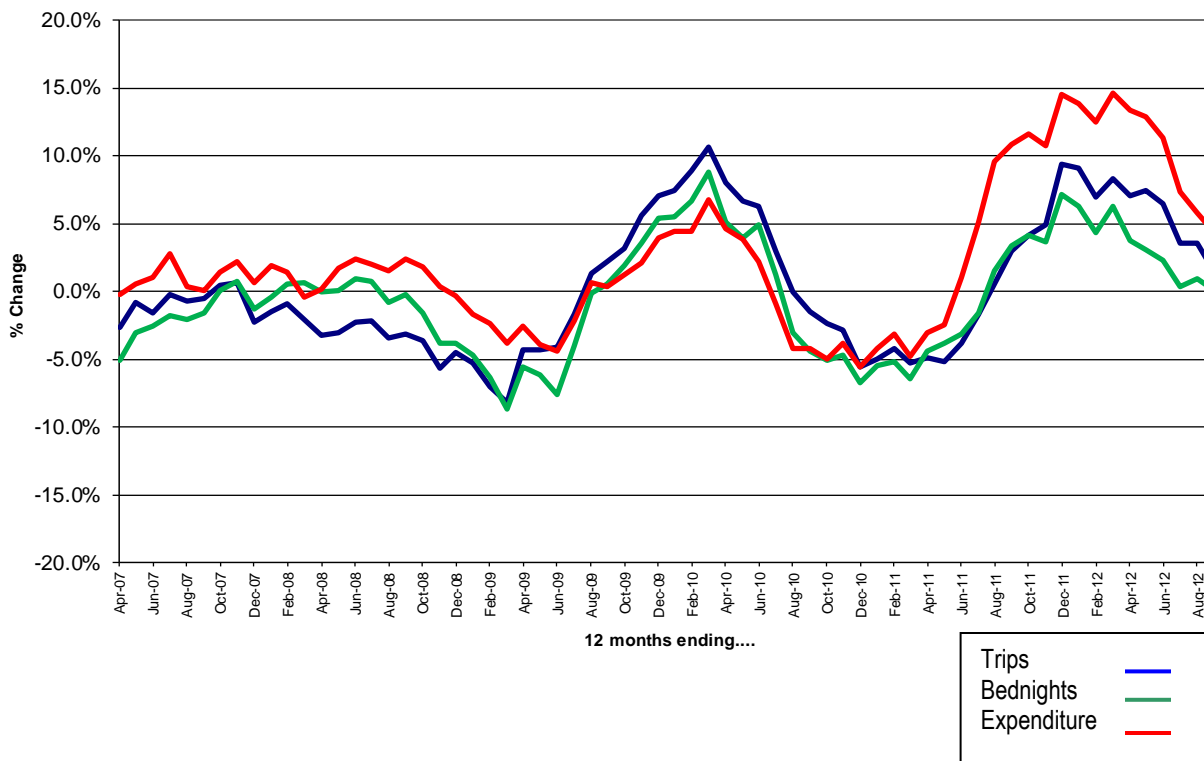
	TRIPS (MILLIONS)			SPEND (£BN)		
	2011	2012	% +/-	2011	2012	% +/-
September	6.1	6.5	+5%	3.6	3.9	+8%
January-September	45.2	45.3	0%	25.3	26.5	+5%
Oct '11 – Sept '12	56.5	56.9	+1%	31.4	32.9	+5%

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 (September 2011 vs. September 2012)
- Year to date (January–September 2011 vs. January– September 2012)
- 12 month rolling (October 2010 – September 2011 vs. October 2011– September 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 (Green), Average Performance (Yellow), Below Average Performance (Red)

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.

	Month: September 2012			Unweighted Trips	YTD: January - September 2012			Unweighted Trips	month rolling October 2011 - September 2012			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-6.9%	0.9%	-1.1%	1504	-3.2%	-3.0%	1.8%	13759	1.4%	0.1%	4.4%	17442
PURPOSE:												
Pure Holiday	-3.8%	0.9%	6.7%	805	-3.3%	-4.4%	1.6%	7062	-0.9%	-3.0%	2.6%	6363
- 1-3 nights holiday	-13.0%	-18.1%	-6.0%	465	-2.3%	-4.3%	4.2%	4204	0.5%	-2.1%	4.8%	5126
- 4+ nights holiday	13.9%	12.4%	19.2%	340	-4.7%	-4.5%	-0.7%	2858	-3.2%	-3.5%	0.3%	3237
VFR (on holiday)	-4.5%	10.6%	6.5%	258	-1.2%	-0.8%	2.6%	2566	6.5%	5.8%	5.4%	3516
HOLIDAY (TOTAL)	-4.0%	2.7%	6.8%	1063	-2.7%	-3.6%	1.7%	9628	1.2%	-0.8%	3.0%	11879
VFR (non-holiday)	-20.4%	-4.7%	-12.2%	233	-11.1%	-7.0%	-4.1%	2096	-4.2%	-2.2%	1.5%	2934
VFR (TOTAL)	-12.7%	3.5%	-2.8%	491	-5.9%	-3.4%	-0.3%	4662	1.3%	2.3%	3.7%	6450
Business	-13.5%	-20.6%	-32.9%	148	1.1%	7.1%	1.8%	1618	5.8%	10.2%	7.0%	2100
Regions:												
West Midlands	27.8%	69.3%	52.7%	111	0.5%	8.2%	1.9%	862	4.5%	4.3%	3.7%	1138
East of England	-14.1%	10.6%	13.4%	122	-10.6%	-2.2%	8.8%	1064	-4.9%	1.0%	9.3%	1366
East Midlands	-1.9%	-0.8%	3.1%	99	-10.3%	-12.1%	-4.1%	915	-3.0%	-7.1%	2.7%	1155
London	-0.3%	-8.3%	-3.6%	117	6.6%	1.1%	5.7%	1193	6.5%	7.4%	1.1%	1573
North West	-16.8%	-8.3%	-6.3%	179	0.9%	1.3%	7.4%	1547	4.6%	2.6%	12.4%	1972
North East	2.7%	45.3%	27.3%	59	1.8%	-2.4%	17.0%	484	2.5%	-0.5%	18.5%	611
South East	25.5%	26.9%	33.3%	232	2.5%	1.2%	7.7%	1908	7.1%	6.7%	11.4%	2400
South West	-19.7%	-14.4%	-5.5%	219	-5.8%	-5.4%	-0.4%	2337	-3.8%	-5.2%	0.1%	2836
Yorkshire & the Humber	-19.1%	-11.9%	-16.6%	138	-0.8%	-1.7%	4.4%	1235	9.2%	6.5%	5.9%	1613
LOCATION TYPE:												
Seaside	-7.2%	2.8%	15.0%	375	-3.2%	-3.2%	2.7%	3193	-0.1%	0.3%	3.5%	3750
Large city/ large town	-11.9%	-11.9%	-15.8%	529	0.1%	1.7%	2.8%	5111	5.5%	7.2%	7.0%	6779
Small town	17.7%	24.0%	23.1%	374	-2.4%	-4.2%	2.4%	3218	1.4%	-4.1%	3.4%	4133
Countryside/ village	-15.3%	-6.3%	-12.3%	272	-6.8%	-7.0%	-1.8%	2628	-3.1%	-5.0%	0.9%	3230
AGE:												
16-24	-0.3%	30.7%	3.7%	191	-8.7%	-3.6%	-1.9%	1555	-4.2%	-1.8%	-1.1%	2042
25-34	5.7%	4.1%	1.7%	294	8.1%	9.1%	16.7%	2502	9.8%	12.5%	13.7%	3144
35-44	-32.8%	-26.4%	-32.0%	225	-15.0%	-11.2%	-12.4%	2854	-7.2%	-8.2%	-5.5%	3655
45-54	-2.2%	5.1%	7.7%	226	4.1%	0.6%	8.8%	2512	5.3%	1.7%	9.0%	3091
55+	0.2%	4.5%	9.7%	577	-2.0%	-4.0%	2.4%	4336	3.6%	0.4%	6.2%	5510
SEG:												
AB	-5.9%	5.3%	2.4%	475	-0.9%	2.0%	4.1%	4606	2.4%	3.3%	5.0%	5796
C1	-5.9%	-0.4%	11.8%	447	-5.9%	-5.2%	-2.7%	4177	0.6%	-1.5%	0.8%	5432
C2	-3.8%	2.4%	-17.2%	273	0.6%	-3.2%	3.3%	2450	5.1%	1.3%	7.6%	3057
DE	-14.1%	-7.2%	-13.3%	309	-7.7%	-9.3%	4.4%	2526	-4.1%	-5.3%	7.9%	3157
CHILDREN IN HH:												
Any	-14.1%	-0.3%	-6.9%	446	-3.7%	-1.2%	3.1%	5023	0.9%	-0.6%	7.0%	6333
None	-3.8%	1.2%	0.6%	1057	-2.9%	-3.8%	1.3%	8736	1.6%	0.5%	3.4%	11110
ACCOMMODATION:												
Commercial accom	-5.4%	-2.3%	-0.1%	959	0.4%	-2.2%	3.3%	8606	3.0%	-1.0%	5.0%	10377
- Serviced accom	-3.3%	-1.3%	-5.0%	646	3.7%	4.1%	6.2%	5586	7.9%	6.7%	8.9%	7089
- Hotel/motel/guesthouse	-6.0%	-6.9%	-6.5%	550	3.0%	3.0%	5.3%	4916	7.5%	6.3%	8.6%	6294
- Bed & Breakfast	1.6%	6.5%	-16.8%	82	12.6%	12.1%	17.8%	631	13.5%	10.2%	13.1%	748
Total self-catering rented	-8.5%	-2.3%	10.7%	298	-5.4%	-7.3%	-3.0%	2815	-6.5%	-8.0%	-4.0%	3031
- Camping & Caravanning (inc. owned caravans)	-11.5%	1.5%	4.4%	230	-7.1%	-2.2%	-2.0%	2102	-6.7%	-1.1%	-0.3%	2239
- Other self-catering rented	8.1%	7.2%	19.0%	128	-3.7%	-10.7%	-4.6%	1123	-7.1%	-13.3%	-6.9%	1247
Hostels	-7.3%	-29.7%	61.5%	13	8.0%	5.5%	25.4%	161	-0.5%	4.2%	13.6%	189
Own home/friends'/relatives'	-6.4%	4.9%	-1.9%	531	-8.3%	-4.5%	-6.5%	5006	-0.3%	1.2%	1.1%	6870

Comparisons with equivalent periods, 2011

	Month: September 2012			Unweighted Trips	YTD: January - September 2012			Unweighted Trips	month rolling October 2011 - September 2012			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-5.6%	2.6%	3.5%	1252	-2.5%	-2.2%	4.3%	11371	1.8%	0.9%	5.9%	14434
PURPOSE:												
Pure Holiday	-1.7%	3.2%	15.3%	660	-2.4%	-2.9%	5.6%	5601	-0.5%	-1.8%	5.9%	6653
- 1-3 nights holiday	-8.9%	-15.3%	2.7%	389	-2.8%	-5.8%	5.9%	3372	-0.2%	-3.7%	5.9%	4138
- 4+ nights holiday	12.2%	14.4%	28.6%	270	-1.7%	-1.4%	5.4%	2225	-1.1%	-0.8%	5.9%	2507
VFR (on holiday)	-1.0%	16.3%	17.7%	218	-2.6%	-4.8%	0.5%	2170	6.4%	4.8%	4.0%	2981
HOLIDAY (TOTAL)	-1.5%	5.6%	15.7%	878	-2.5%	-3.3%	4.8%	7769	1.5%	-0.1%	5.6%	9633
VFR (non-holiday)	-18.6%	-6.9%	-14.4%	206	-8.0%	-4.1%	-3.2%	1871	-2.5%	-0.2%	1.9%	2603
VFR (TOTAL)	-10.4%	5.3%	1.5%	424	-5.2%	-4.5%	-1.1%	4042	2.0%	2.6%	3.1%	5586
Business	-20.6%	-26.4%	-39.2%	116	-0.5%	8.8%	2.5%	1359	3.6%	9.6%	4.4%	1733
Regions:												
West Midlands	27.8%	69.3%	52.7%	111	0.5%	8.2%	1.9%	862	4.5%	4.3%	3.7%	1138
East of England	-14.1%	10.6%	13.4%	122	-10.6%	-2.2%	8.8%	1064	-4.9%	1.0%	9.3%	1366
East Midlands	-1.9%	-0.8%	3.1%	99	-10.3%	-12.1%	-4.1%	915	-3.0%	-7.1%	2.7%	1155
London	-0.3%	-8.3%	-3.6%	117	6.6%	1.1%	5.7%	1193	6.5%	7.4%	1.1%	1573
North West	-16.8%	-8.3%	-6.3%	179	0.9%	1.3%	7.4%	1547	4.6%	2.6%	12.4%	1972
North East	2.7%	45.3%	27.3%	59	1.8%	-2.4%	17.0%	484	2.5%	-0.5%	18.5%	611
South East	25.5%	26.9%	33.3%	232	2.5%	1.2%	7.7%	1908	7.1%	6.7%	11.4%	2400
South West	-19.7%	-14.4%	-5.5%	219	-5.8%	-5.4%	-0.4%	2337	-3.8%	-5.2%	0.1%	2836
Yorkshire & the Humber	-19.1%	-11.9%	-16.6%	138	-0.8%	-1.7%	4.4%	1235	9.2%	6.5%	5.9%	1613
LOCATION TYPE:												
Seaside	-8.7%	1.0%	13.5%	310	-3.6%	-0.1%	4.4%	2559	-1.4%	2.1%	3.6%	3002
Large city/ large town	-13.5%	-14.3%	-18.6%	459	0.2%	1.4%	3.7%	4407	5.2%	6.8%	7.7%	5821
Small town	24.2%	29.1%	51.5%	299	-1.9%	-5.4%	3.9%	2564	2.1%	-4.1%	3.8%	3307
Countryside/ village	-7.5%	7.5%	6.6%	219	-4.9%	-6.2%	6.1%	2125	-0.6%	-3.7%	7.2%	2634
AGE:												
16-24	9.6%	34.6%	19.7%	160	-8.3%	-3.3%	1.8%	1317	-4.0%	-0.3%	1.7%	1732
25-34	5.5%	5.6%	-3.6%	246	11.6%	12.5%	18.2%	2097	13.0%	15.5%	14.9%	2643
35-44	-27.4%	-19.2%	-25.2%	202	-12.9%	-10.6%	-6.4%	2420	-7.0%	-8.7%	-2.9%	3050
45-54	-2.7%	15.0%	15.0%	181	3.0%	5.0%	10.8%	2034	5.1%	5.7%	9.9%	2515
55+	-2.3%	1.1%	14.8%	463	-2.7%	-5.9%	2.6%	3501	3.3%	-0.7%	7.2%	4495
SEG:												
AB	-7.0%	10.3%	4.6%	388	-1.3%	1.7%	7.2%	3813	2.2%	3.3%	7.7%	4814
C1	-0.1%	4.9%	25.6%	388	-5.1%	-5.6%	-2.2%	3488	1.1%	-2.1%	-0.3%	4533
C2	-8.0%	-2.1%	-15.5%	219	-0.3%	-1.6%	5.9%	1975	4.3%	3.4%	9.7%	2466
DE	-9.7%	-9.3%	-12.7%	259	-2.9%	-4.6%	10.5%	2093	-0.7%	-1.0%	12.9%	2618
CHILDREN IN HH:												
Any	-14.2%	0.0%	-8.8%	370	-1.4%	1.1%	7.0%	4185	2.3%	0.8%	9.2%	5274
None	-1.9%	3.5%	7.5%	881	-3.1%	-3.7%	3.2%	7192	1.6%	1.0%	4.7%	9167
ACCOMMODATION:												
Commercial accom	-3.0%	0.9%	4.4%	802	1.1%	-0.1%	5.7%	7005	3.2%	0.5%	6.1%	8441
- Serviced accom	-1.8%	0.5%	-1.7%	540	3.4%	3.3%	7.1%	4624	6.9%	5.2%	8.2%	5856
- Hotel/motel/guesthouse	-3.6%	-4.9%	-3.8%	467	2.7%	2.1%	5.6%	4077	6.7%	4.8%	7.5%	5215
- Bed & Breakfast	-3.8%	9.9%	-12.3%	63	13.5%	14.5%	23.3%	517	13.8%	11.5%	16.0%	610
Total self-catering rented	-4.4%	2.8%	17.8%	247	-2.4%	-2.6%	2.5%	2223	-3.8%	-3.6%	1.3%	2387
- Camping & Caravanning (inc. owned caravans)	-9.1%	8.7%	10.7%	186	-6.3%	-1.1%	1.8%	1625	-5.7%	0.1		