

### GB TOURISM SURVEY – February 2015 SUMMARY OF RESULTS

#### 1. Headlines

- In February 2015, there were 7.8 million domestic overnight trips in Great Britain. This was a +13% increase on February 2014, when trip volumes fell back to 6.9 million.
- Bednights and expenditure were also up, with nights up by +10% to 18.4 million and spend up +13% to £1.3 billion.
- Looking at England alone, trips also increased compared to February last year, at 6.6 million (+17%). Nights and spend were both up by +13%.
- In the year to date, trips in Great Britain were up by +19% to 14.8 million. Nights and spend were also up by 18% and 21% respectively.

#### 2. Context

 Weather in February 2015 was colder and drier than average. This compares to the weather in February 2014, which saw major winter storms and severe flooding, particularly in the South of England.

### 3. Trip Characteristics – January – February 2015

- In the year to February, holiday trips in Great Britain have increased by 6% compared to last year, from 4.6 million to 4.8 million. Nights and expenditure have increased further, by 11% and 12% respectively. This increase was driven by longer holidays of 4+ nights, which have increased by +32%.
- Visits to friends and relatives (VFR) trips grew by a greater extent, by 25% to 6.6 million, with nights and spend up 23% and 30% respectively.
- Business trips were also up for the year so far, by 12% to 2.5 million, and nights gaining even further by 22% to 5.8 million. Expenditure on business trips was also up, by 16%.
- Trips to all types of destinations increased in January and February, with trips particularly increasing to small towns (+30%) and the countryside / villages (+31%).
- Trip taking increased across all age and social groups, but particularly among those aged 55+ (+27%) and those in the AB social group (+29%).
- Note: January and February trip volumes are low compared to other periods of the year, and care should be taken in interpreting trends by subgroup. Information about sample size is available on the final page of this report.

### 4. Overseas Travel by UK Residents

- The number of trips taken abroad by UK residents in February was consistent with February 2014 (both 3.4 million), although expenditure on these trips was down -5%. For the year so far (January to February), trips abroad increased by +3% and expenditure was down -3%.

#### 5. Other Tourism Surveys

- Room occupancy in February showed an increase of +2%, rising to 61%, with bedspace occupancy also up +2% to 44%.
- The volume of day visits in Great Britain in the three months to February 2015 decreased by -7% when compared with the same period last year, falling from 346 million to 323 million, with the value of these visits decreasing -2%, to £11.1 billion.
- The January Tourism Business Monitor showed a majority of attractions and accommodation providers had more visitors at Christmas / New Year in 2014 than at the same time in 2013.

### **KEY MEASURES**



# Year on Year Comparison – All Trips

	TRI	PS (MILLIC	ONS)	NIG	HTS (MILL	IONS)			
	2014	2015	% +/-	2014	2015	% +/-	2014	2015	% +/-
February '15									
GB	6.9	7.8	+13%	16.7	18.4	+10%	1,179	1,328	+13%
England	5.7	6.6	+17%	13.5	15.3	+13%	968	1,090	+13%
_									
Jan-Feb '15									
GB	12.5	14.8	+19%	29.7	35.1	+18%	2,123	2,561	+21%
England	10.5	12.6	+19%	25.0	29.1	+17%	1,802	2,090	+16%

# Purpose of Trip – February 2015

	TRIF	S (MILLIC	NS)	NIGH	ITS (MILLI	ONS)	SPEND (£M)					
	2014	2015	% +/-	2014	2015	% +/-	2014	2015	% +/-			
GB												
Holiday	2.8	2.8	-1%	6.5	6.8	+5%	556	589	+6%			
Business	1.1	1.1	0%	2.6	2.4	-10%	311	275	-12%			
VFR	2.8	3.6	+26%	7.1	8.5	+19%	273	399	+46%			
England												
Holiday	2.2	2.4	+8%	5.2	5.7	+10%	442	493	+12%			
Business	0.9	1.0	+14%	2.0	2.0	-1%	263	222	-16%			
VFR	2.5	3.0	+21%	5.9	7.0	+18%	228	324	+42%			

# Purpose of Trip – Year to Date (January - February 2015)

	TRIF	PS (MILLIC	DNS)	NIGH	TS (MILLI	ONS)	SPEND (£M)					
	2014	2015	% +/-	2014	2015	% +/-	2014	2015	% +/-			
GB												
Holiday	4.6	4.8	+6%	10.6	11.8	+11%	963	1,078	+12%			
Business	2.2	2.5	+12%	4.7	5.8	+22%	550	639	+16%			
VFR	5.3	6.6	+25%	12.8	15.7	+23%	534	692	+30%			
England												
Holiday	3.7	4.0	+8%	8.7	9.3	+8%	800	861	+8%			
Business	1.8	2.1	+14%	3.9	4.8	+23%	467	516	+11%			
VFR	4.7	5.9	+24%	10.9	13.5	+24%	461	586	+27%			

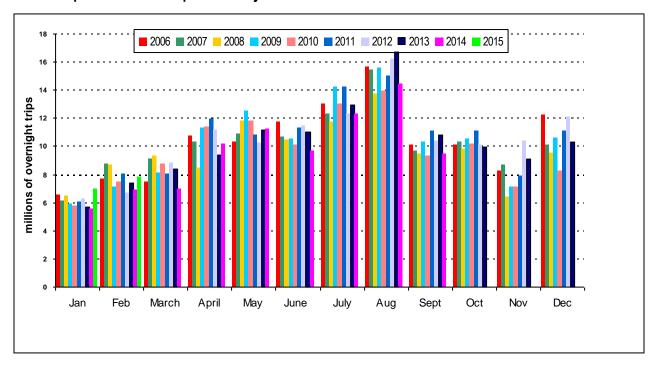
## **Outbound Travel - UK Residents**

	Ţ	RIPS (MILLIONS	S)	SPEND (£BN)							
	2014	2015	% +/-	2013	2014	% +/-					
February 2015	3.4	3.4	+1%	2.1	2.0	-5%					
Jan '15 - Feb '15	7.1	7.4	+3%	4.4	4.3	-3%					
Mar '14 – Feb '15	58.2	60.3	+4%	35.1	35.4	+1%					

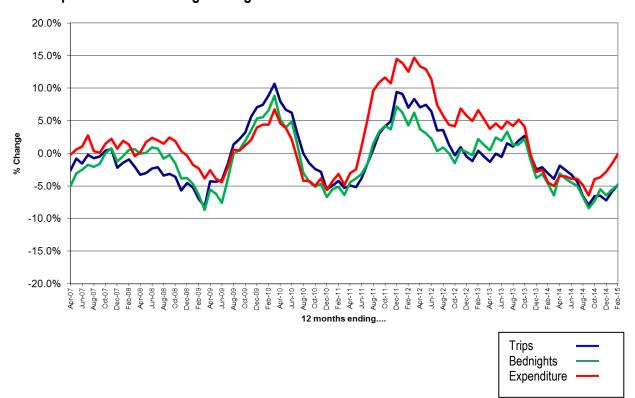
## **TREND CHARTS**



# **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 (February 2014 vs. February 2015)
- Year to date (Jan-Feb 2014 vs. Jan-Feb 2015)
- 12 month rolling (Mar13-Feb14 vs. Mar14-Feb15)

### 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

						- 1	LAN	(-OIV-	ILA		/IVIE /	ANIOC	N, BY TRIP C	HAN	ACI	LKK	)								
GBTS: Comparison				iods, 201	5								Comparisons with equivale	nt periods	, 2015										
LEGEND:	Above Average Performance	Average Performance	Below Average Performance																						
NOTE:	performance	' indicate wh	ere the percer	ntage change is r	more than 5 pe	ercentage poir	nts above the a	or England in eac average; those m	arked 'below a	average perfo	rmace' indica	te where the													
	changes are	further away	from the avera	age. The number	rs of unweighte	ed trips are als	so displayed to	necessarily statis indicate where treated with cau	sample sizes a	ant - they only are relatively s	indicate those small. Where	e cells where there are 75 or													
							Britain	-				-							Eng	gland					
		Month: Feb 20	15	Unweighted	Y	TD: Jan - Feb 2	1015	Unweighted	12 month	rolling Mar 201	4 - Feb 2015	Unweighted			Month: Feb 201	15	Unweighted	Y	TD: Jan - Feb 2	015	Unweighted	12 month i	rolling Mar 201	4 - Feb 2015	Unweighted
TOTAL	Trips		Expenditure 12.6%	Trips 1038	Trips		Expenditure 20.6%	Trips 1952	-4.6%	Bednights -4.7%	Expenditure 0.2%	Trips 14661	TOTAL	Trips	Bednights 13.1%	Expenditure	Trips 881	Trips	Bednights 16.5%	Expenditure	Trips 1662	-6.5%		-1.2%	Trips 11965
PURPOSE:	13.2 /6	10.2 /0	12.0 /6	7038	10.7 /6	10.2 /6	20.0 /6	1952	-4.0 /6	-4.7 /0	0.2 /6	14001	PURPOSE:	10.7 /6	13.176	12.0 /6	887	19.176	10.5 /6	10.0 /6	1662	-0.5 /6	-0.0 /6	-1.2/0	71905
Pure Holiday	-0.8%	4.9%	5.9%	364	5.9%	10.8%	11.9%	639	-7.1%	-6.7%	-3.1%	7064	Pure Holiday	7.5%	10.4%	11.5%	311	7.5%	7.1%	7.6%	525	-9.2%	-8.8%	-4.8%	5449
- 1-3 nights holiday	-5.6%	-5.2%	-6.2%	289	1.4%	2.5%	1.2%	512	-8.4%	-7.2%	-7.5%	4330	- 1-3 nights holiday	4.5%	3.0%	0.8%	249	5.6%	5.0%	0.3%	428	-10.4%	-8.1%	-8.6%	3401
- 4+ nights holiday	24.5%		57.5%	75	32.0%	26.7%	58.2%	127	-4.7%	-6.5%	1.7%	2734	- 4+ nights holiday	21.5%	22.4%	60.8%	62	18.0%	10.8%	40.7%	97	-6.9%	-9.2%	-0.3%	2041
VFR (on holiday)	13.1%	11.4%	24.6%	283	15.9%	12.6%	17.3%	532	1.9%	0.4%	7.1%	3496	VFR (on holiday)	7.9%	14.1%	24.5%	238	14.7%	15.6%	17.0%	465	0.4%	-1.1%	6.3%	2956
HOLIDAY (TOTAL)	4.5%	7.6%	10.6%	646	10.0%	11.6%	13.4%	1171	-4.3%	-4.6%	-1.2%	10560	HOLIDAY (TOTAL)	7.6%	11.9%	15.0%	548	10.6%	10.8%	10.3%	989	-6.0%	-6.4%	-2.7%	8408
VFR (non-holiday)	47.5%	32.1%	100.0%	217	37.3%	40.4%	55.0%	404	-4.9%	-7.6%	6.6%	2100	VFR (non-holiday)	42.5%	24.7%	85.3%	186	36.8%	36.7%	48.0%	359	-8.9%	-13.2%	-1.9%	1770
VFR (TOTAL)	26.3%	19.2%	46.2%	499	24.5%	22.9%	29.6%	935	-0.9%	-2.4%	6.9%	5596	VFR (TOTAL)	21.3%	18.2%	42.1%	423	23.6%	23.6%	27.1%	823	-3.4%	-5.5%	3.3%	4725
Business	-0.1%	-10.3%	-11.6%	124	12.3%	22.2%	16.2%	275	-5.2%	1.9%	1.9%	1575	Business	13.7%	-1.3%	-15.6%	107	14.3%	22.8%	10.5%	229	-4.4%	5.0%	3.8%	1345
Regions:													Regions:												
West Midlands	25.4%	17.4%	65.6%	71	10.3%	7.7%	54.6%	130	-16.5%	-12.8%	-4.2%	891	West Midlands	25.4%	17.4%	65.6%	71	10.3%	7.7%	54.6%	130	-16.5%	-12.8%	-4.2%	891
East of England	-25.6%			69	13.2%	-3.3%	2.9%	171	0.5%	5.4%	13.0%	1198	East of England	-25.6%			69	13.2%	-3.3%	2.9%	171	0.5%	5.4%	13.0%	1198
East Midlands	34.5%	36.9%	25.0%	81	33.5%	16.5%	22.9%	142	-6.8%	-4.6%	2.3%	952	East Midlands	34.5%	36.9%	25.0%	81	33.5%	16.5%	22.9%	142	-6.8%	-4.6%	2.3%	952
London	21.5%	20.1%	23.9%	123	18.7%	14.7%	11.5%	234	-4.2%	-7.6%	5.5%	1381	London	21.5%	20.1%	23.9%	123	18.7%	14.7%	11.5%	234	-4.2%	-7.6%	5.5%	1381
North West	25.3%	35.2%	34.4%	121	25.9%	25.7%	35.1%	221	-4.2%	4.4%	3.8%	1678	North West	25.3%	35.2%	34.4%	121	25.9%	25.7%	35.1%	221	-4.2%	4.4%	3.8%	1678
North East	67.5%	42.9%	60.0%	40	47.6%		29.7%	73	2.4%	-4.0%	-10.9%	466	North East	67.5%	42.9%	60.0%	40	47.6%		29.7%	73	2.4%	-4.0%	-10.9%	466
South East	37.2%	51.2%	3.4%	153	39.3%	73.0%	23.7%	281	-5.2%	-6.5%	-4.9%	2101	South East	37.2%	51.2%	3.4%	153	39.3%	73.0%	23.7%	281	-5.2%	-6.5%	-4.9%	2101
South West	2.1%	15.3%	-5.8%	139	9.4%	14.2%	-0.6%	256	-10.4%	-14.9%	-9.0%	2262	South West	2.1%	15.3%	-5.8%	139	9.4%	14.2%	-0.6%	256	-10.4%	-14.9%	-9.0%	2262
Yorkshire & the Humber	11.6%	-11.0%	26.5%	97	9.3%	0.0%	12.4%	179	-6.5%	-7.9%	-0.5%	1244	Yorkshire & the Humber	11.6%	-11.0%	26.5%	97	9.3%	0.0%	12.4%	179	-6.5%	-7.9%	-0.5%	1244
LOCATION TYPE:													LOCATION TYPE:												
Seaside	4.0%	10.1%	25.5%	139	10.5%	23.7%	20.1%	248	-1.5%	-2.3%	3.5%	3236	Seaside	10.4%	23.1%	34.6%	123	19.3%	33.4%	23.5%	217	-4.3%	-5.4%	1.1%	2481
Large city/ large town	12.9%	12.0%	13.2%	505	14.1%	13.3%	19.5%	944	-4.9%	-5.7%	-0.1%	5672	Large city/ large town	17.8%	9.9%	13.9%	437	15.1%	10.2%	15.2%	820	-6.4%	-7.8%	-0.6%	4859
Small town Countryside/ village	18.1%	17.5%	9.3%	245 171	29.4%	9.3%	19.1%	472 324	-5.5% -2.3%	-7.4% -2.9%	-4.6% 2.3%	3356 2836	Small town  Countryside/ village	20.0%	17.9%	4.6% 1.3%	200	27.5%	31.4% 5.7%	12.3%	389 261	-7.3% -4.2%	-8.1% -5.5%	-4.2% -1.8%	2680
AGE:	10.4%	2.0%	3.3%	1//	30.7%	9.3%	29.9%	324	-2.3%	-2.9%	2.3%	2636	AGE:	17.1%	10.4%	1.3%	140	24.5%	5.7%	19.1%	261	-4.2%	-5.5%	-1.0%	2224
16-24	27.9%	34.0%	47.3%	140	13.9%	13.9%	23.9%	257	-10.7%	-15.7%	0.3%	1592	16-24	44.5%	49.5%	88.0%	121	17.8%	13.3%	31.9%	224	-13.6%	-17.4%	0.1%	1306
25-34	-1.7%	-4.8%	8.3%	162	19.6%	13.4%	23.1%	322	-6.8%	-5.2%	-2.1%	2478	25-34	-8.9%	-19.3%	2.8%	129	20.9%	2.9%	24.8%	265	-8.2%	-6.0%	-1.2%	1989
35-44	15.9%	13.7%	-3.0%	212	21.9%	25.9%	4.0%	353	-9.3%	-9.4%	-5.2%	2832	35-44	19.6%	10.9%	-5.9%	188	23.6%	20.9%	-0.5%	311	-11.2%	-12.7%	-7.7%	2308
45-54	-5.0%	-7.4%	0.0%	163	7.6%	10.0%	15.4%	341	-1.8%	-1.0%	-1.8%	2591	45-54	-2.2%	-0.7%	-8.1%	132	7.3%	9.9%	4.8%	285	-4.1%	-0.6%	-3.7%	2091
55+	28.4%	19.8%	29.1%	360	26.9%	23.6%	35.0%	678	0.5%	0.2%	5.9%	5168	55+	33.9%	32.3%	33.2%	311	24.5%	27.2%	27.4%	571	-0.9%	-3.1%	4.5%	4209
SEG:													SEG:												
AB	22.3%	18.1%	10.0%	378	28.6%	31.7%	25.0%	714	3.2%	4.9%	5.5%	5060	AB	25.2%	18.3%	5.3%	326	29.3%	30.6%	17.6%	614	-1.2%	0.3%	0.6%	4070
C1	-2.9%	-3.5%	2.2%	309	6.9%	9.8%	16.9%	598	-9.4%	-8.8%	-2.3%	4471	C1	0.9%	2.1%	6.3%	261	5.5%	7.3%	14.7%	497	-9.2%	-10.0%	-0.6%	3707
C2	28.8%	5.1%	44.2%	182	20.0%	-10.4%	16.1%	311	-8.7%	-10.5%	-2.2%	2537	C2	28.6%	5.1%	41.2%	149	20.2%	-15.6%	7.5%	262	-8.8%	-11.2%	-1.4%	2059
DE	5.5%	27.8%	14.9%	169	12.8%	40.0%	16.4%	329	-12.1%	-13.2%	-11.3%	2593	DE	14.5%	37.2%	40.7%	143	16.5%	41.9%	27.4%	284	-13.8%	-13.0%	-10.6%	2059
CHILDREN IN H/H:													CHILDREN IN H/H:												
Any	10.9%	6.9%	12.3%	346	23.5%	18.5%	24.9%	629	-1.6%	-3.5%	2.9%	5294	Any	7.3%	-5.4%	5.8%	287	21.7%	7.9%	20.6%	530	-3.7%	-6.4%	1.0%	4296
None	14.2%	11.7%	12.8%	691	16.8%	18.1%	19.3%	1322	-6.0%	-5.2%	-0.8%	9367	None	21.2%	22.6%	15.1%	592	18.1%	19.9%	14.4%	1127	-7.8%	-7.1%	-2.0%	7605
ACCOMMODATION:													ACCOMMODATION:												
Commercial accom	2.7%	-3.0%	4.4%	561	8.4%	4.5%	14.3%	1033	-5.1%	-4.2%	1.1%	8732	Commercial accom	8.4%	0.9%	4.4%	480	8.6%	1.7%	8.8%	868	-6.3%	-5.4%	0.4%	7055
- Serviced accom	3.3%	-6.2%	-0.5%	475	8.9%	5.2%	11.2%	876	-4.5%	-1.6%	0.2%	5985	- Serviced accom	11.0%	-1.5%	-1.7%	407	11.6%	5.7%	6.4%	742	-4.3%	0.4%	0.6%	4996
- Hotel/motel/guesthouse	3.4%	-0.5%	-2.8%	429	9.2%	10.9%	10.6%	794	-4.2%	-1.3%	-0.4%	5358	- Hotel/motel/guesthouse	9.9%	1.0%	-5.0%	367	11.4%	9.7%	5.6%	670	-4.0%	1.3%	0.4%	4486
- Bed & Breakfast	4.9%		17.7%	43	14.6%	-2.8%	22.7%	78	-9.2%	-4.6%	8.7%	563	- Bed & Breakfast	25.5%			36	25.1%		19.3%	67	-8.5%	-5.4%	7.2%	464
Total self-catering rented	-12.6%		29.1%	66	1.0%	1.5%	38.6%	124	-7.5%	-7.9%	2.6%	2558	Total self-catering rented	-18.1%		34.4%	56	-9.1%	-9.7%	29.4%	100	-10.8%	-11.4%	-0.7%	1922
-Camping & Caravanning (inc. owned caravans)	-23.8%		12.5%	19	-2.7%		21.4%	38	-6.1%	-9.0%	-3.9%	1882	<ul> <li>-Camping &amp; Caravanning (inc. owned caravans)</li> </ul>	-22.1%		14.3%	16	2.1%	16.2%	29.2%	32	-9.9%	-11.9%	-6.4%	1368
-Other self-catering rented	-4.7%		29.2%	54	5.7%	0.0%	44.4%	98	-2.1%	-3.5%	8.0%	1137	-Other self-catering rented	-11.1%		38.1%	45	-7.9%		34.2%	75	-4.1%	-6.4%	5.1%	846
Hostels	64.2%	127.8%	83.3%	12	90.3%	115.9%	53.8%	23	-9.0%	-23.1%	4.1%	100	Hostels	100.0%	311.4%	300.0%	9	53.9%	103.7%	33.3%	15	-37.9%	-52.0%	-6.3%	51
Own home/friends'/relatives'	24.6%	22.8%	42.3%	460	29.8%	28.0%	41.0%	881	-3.5%	-5.8%	-2.5%	5842	Own home/friends'/relatives'	25.3%	24.2%	42.6%	388	30.9%	28.1%	41.4%	765	-6.4%	-9.0%	-6.0%	4843