

Great Britain Tourism Survey

April 2014 Update



Summary – April 2014 Update

ALL TOURISM

- The volume of domestic GB overnight trips taken in April 2014 has increased compared to the same period for 2013 (+9%). There have been increases across each of the GB nations, in particular for Wales (+5% England, +13% Scotland and +82% for Wales). In addition to being one of the warmest April's to date, April 2014 also benefitted from having both Easter bank holidays, compared to April 2013 which shared the holidays with March 2013. These factors are likely to have contributed to the increase in April trips this year.
- There were also increases for both the number of nights spent on these trips (+22%) and also expenditure (+4%). While the rise in nights was seen across each of the nations, the expenditure increase was only seen in Scotland (+3.2%) and Wales (+91.7%).
- There were 29.6m GB domestic trips taken in the period January to April for 2014, a decline of 4% compared to the same period for 2013, reaching its lowest point in 6 years.

HOLIDAYS

- The volume of holiday trips taken during April reflected the positive performance seen across GB, with an increase of 16% compared to 2013. Positive performances were seen across each of the GB nations (+10% England, +28% Scotland, +83% Wales).
- These April holiday trips were also longer (+25% increase in the number of nights spent) and saw greater levels of expenditure (+15%) than the previous year. Again, these improvements were seen across each of the GB nations.
- Looking at the year-to-date view for holiday trip volumes, there were 3% more trips taken during January to April in 2014 compared to 2013, though at 12.5m trips it is still below pre-2013 levels.

VISITING FRIENDS & RELATIVES

- There has been an overall increase in trips taken for the purpose of visiting friends and relatives in April 2014 compared to the previous April (+23%), with the volume of this type of trip rising amongst each of the GB nations (+20% England, +32% Scotland, +94% Wales).
- Trips to see friends and relatives were also longer than in April 2013, with a 47% increase in the number of nights spent on these trips. The amount of money spent on this type of trip also rose (+32%).
- The volume of trips taken for the purpose of visiting friends and relatives from January to April rose against 2013 from 11.5m to 11.7m.

BUSINESS TOURISM

- In contrast to the performance of other types of domestic GB trips, the volume of business trips taken in April has declined overall (-29%). Declines were seen in England (-24%) and Scotland (-68%) for this type of trip, while Wales saw an increase of 23%.
- There were 27% fewer nights spent on them. Expenditure also fell by 39%.
- Looking at the year-to-date, the volume of business trips taken during January to April has fallen 22% since last year (5.9m 2014 vs. 4.6m 2013).

GB Domestic Tourism: Monthly Volume & Value 2014

ALL TOURISM

	January			February			March			April			May			June		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
TRIPS																		
GB	5.702	5.532	-3.0%	7.418	6.932	-6.6%	8.408	6.957	-17.3%	9.357	10.172	+8.7%						
England	4.776	4.846	+1.5%	6.287	5.707	-9.2%	6.983	5.516	-21.0%	7.800	8.209	+5.2%						
BEDNIGHTS																		
GB	12.577	12.992	+3.3%	19.125	17.391	-9.1%	24.576	17.841	-27.4%	25.153	30.716	+22.1%						
England	10.491	11.490	+9.5%	15.465	14.187	-8.3%	19.081	13.229	-30.7%	20.185	23.334	+15.6%						
EXPENDITURE																		
GB	£940	£945	+0.5%	£1,390	£1,183	-14.9%	£1,455	£1,267	-12.9%	£1,796	£1,871	+4.2%						
England	£766	£834	+8.9%	£1,157	£973	-15.9%	£1,198	£980	-18.2%	£1,464	£1,455	-0.6%						

	July			August			September			October			November			December			YTD – Apr		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
TRIPS																					
GB																			30.885	29.593	-4.2%
England																			25.846	24.278	-6.1%
BEDNIGHTS																					
GB																			81.432	78.939	-3.1%
England																			65.222	62.240	-4.6%
EXPENDITURE																					
GB																			£5,582	£5,267	-5.6%
England																			£4,585	£4,242	-7.5%

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Fieldwork: 9 Mar – 25 May
 TNS Face-to-Face Omnibus Survey
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GB Domestic Tourism: Monthly Volume & Value 2014

HOLIDAYS

	January			February			March			April			May			June		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
TRIPS																		
GB	1.811	1.778	-1.8%	2.497	2.792	+11.8%	3.584	2.967	-17.2%	4.298	5.001	+16.4%						
England	1.433	1.497	+4.5%	2.020	2.205	+9.2%	2.778	2.206	-20.6%	3.453	3.782	+9.5%						
BEDNIGHTS																		
GB	3.904	4.154	+6.4%	5.843	6.687	+14.4%	12.009	8.288	-31.0%	12.954	16.246	+25.4%						
England	3.069	3.558	+15.9%	4.311	5.401	+25.3%	8.595	5.812	-32.4%	10.265	11.748	+14.4%						
EXPENDITURE																		
GB	£348	£407	+17.0%	£489	£559	+14.3%	£766	£688	-10.2%	£941	£1,083	+15.1%						
England	£269	£358	+33.1%	£377	£445	+18.0%	£607	£530	-12.7%	£759	£799	+5.3%						

	July			August			September			October			November			December			YTD – Apr		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
TRIPS																					
GB																			12.190	12.538	+2.9%
England																			9.683	9.690	+0.1%
BEDNIGHTS																					
GB																			34.710	35.375	+1.9%
England																			26.241	26.519	+1.1%
EXPENDITURE																					
GB																			£2,544	£2,736	+7.5%
England																			£2,012	£2,131	+5.9%

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GB Domestic Tourism: Monthly Volume & Value 2014

VISITING FRIENDS & RELATIVES

	January			February			March			April			May			June		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
TRIPS																		
GB	2.284	2.524	+10.5%	3.028	2.816	-7.0%	3.183	2.673	-16.0%	3.024	3.728	+23.3%						
England	1.981	2.248	+13.5%	2.630	2.489	-5.4%	2.738	2.257	-17.6%	2.612	3.134	+20.0%						
BEDNIGHTS																		
GB	5.288	5.681	+7.4%	8.182	7.135	-12.8%	8.640	6.289	-27.2%	7.557	11.092	+46.8%						
England	4.695	4.995	+6.4%	6.813	5.888	-13.6%	7.123	5.200	-27.0%	6.363	8.665	+36.2%						
EXPENDITURE																		
GB	£239	£262	+9.6%	£329	£273	-17.0%	£360	£275	-23.6%	£355	£469	+32.1%						
England	£199	£234	+17.6%	£286	£228	-20.3%	£305	£226	-25.9%	£295	£377	+27.8%						

	July			August			September			October			November			December			YTD - Apr		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
TRIPS																					
GB																			11.518	11.742	+1.9%
England																			9.961	10.128	+1.7%
BEDNIGHTS																					
GB																			29.668	30.198	+1.8%
England																			24.994	24.748	-1.0%
EXPENDITURE																					
GB																			£1,283	£1,278	-0.4%
England																			£1,084	£1,064	-1.8%

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GB Domestic Tourism: Monthly Volume & Value 2014

BUSINESS TOURISM

TRIPS	January			February			March			April			May			June			
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	
GB	1.315	1.099	-16.4%	1.639	1.148	-30.0%	1.234	1.143	-7.4%	1.696	1.213	-28.5%							
England	1.126	0.971	-13.8%	1.388	0.871	-37.2%	1.092	0.922	-15.6%	1.441	1.093	-24.1%							

BEDNIGHTS	January			February			March			April			May			June			
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	
GB	2.831	2.087	-26.3%	4.220	2.629	-37.7%	2.861	2.898	+1.3%	3.965	2.894	-27.0%							
England	2.349	1.867	-20.5%	3.482	2.024	-41.9%	2.330	1.963	-15.8%	2.993	2.480	-17.1%							

EXPENDITURE	January			February			March			April			May			June			
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	
GB	£308	£239	-22.4%	£519	£311	-40.1%	£261	£280	+7.3%	£442	£270	-38.9%							
England	£262	£205	-21.8%	£443	£263	-40.6%	£222	£209	-5.9%	£362	£232	-35.9%							

TRIPS	July			August			September			October			November			December			YTD – Apr		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			5.884	4.603	-21.8%
England																			5.047	3.857	-23.6%

BEDNIGHTS	July			August			September			October			November			December			YTD – Apr		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			13.878	10.508	-24.3%
England																			11.153	8.334	-25.3%

EXPENDITURE	July			August			September			October			November			December			YTD – Apr		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			£1,530	£1,100	-28.1%
England																			£1,289	£908	-29.6%

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GB Domestic Tourism: Year to Date – 2009-2014

Trips, Bednights & Expenditure, Jan-Apr period

	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan - Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
TRIPS	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014
GB	31.655	32.448	34.026	32.952	30.885	29.593	13.036	12.557	13.943	13.623	12.190	12.538	12.390	13.274	13.231	12.069	11.518	11.742	5.335	5.646	5.618	5.882	5.884	4.603
England	26.842	26.912	28.369	27.637	25.846	24.278	10.471	9.877	11.105	10.877	9.683	9.690	11.001	11.530	11.491	10.578	9.961	10.128	4.588	4.685	4.828	5.003	5.047	3.857
	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan - Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
BEDNIGHTS	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014
GB	89.952	86.951	92.974	86.759	81.432	78.939	41.593	37.917	41.545	38.696	34.710	35.375	33.413	34.121	34.441	31.680	29.668	30.198	12.581	11.861	12.394	13.143	13.878	10.508
England	74.053	68.764	75.999	70.797	65.222	62.240	32.777	29.395	32.108	30.109	26.241	26.519	28.718	28.144	29.351	26.778	24.994	24.748	10.602	9.387	10.551	11.206	11.153	8.334
	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan - Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
EXPENDITURE	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014
GB	£5,109	£5,019	£5,469	£5,749	£5,582	£5,267	£2,469	£2,394	£2,822	£2,878	£2,544	£2,736	£1,208	£1,196	£1,246	£1,229	£1,283	£1,278	£1,304	£1,261	£1,228	£1,442	£1,530	£1,100
England	£4,200	£4,051	£4,447	£4,727	£4,585	£4,242	£1,995	£1,911	£2,193	£2,318	£2,012	£2,131	£1,035	£991	£1,059	£1,032	£1,084	£1,064	£1,067	£1,023	£1,050	£1,208	£1,289	£908

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GB Domestic Tourism: Year to Date – 2009-2014

Trip Characteristics, Jan-Apr period

	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan - Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
Av. Trip Length	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014
GB	2.84	2.68	2.73	2.63	2.64	2.67	3.19	3.02	2.98	2.84	2.85	2.82	2.70	2.57	2.60	2.62	2.58	2.57	2.36	2.10	2.21	2.23	2.36	2.28
England	2.76	2.56	2.68	2.56	2.52	2.56	3.13	2.98	2.89	2.77	2.71	2.74	2.61	2.44	2.55	2.53	2.51	2.44	2.31	2.00	2.19	2.24	2.21	2.16
	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan - Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
Av. £/Night	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014
GB	£57	£58	£59	£66	£69	£67	£59	£63	£68	£74	£73	£77	£36	£35	£36	£39	£43	£42	£104	£106	£99	£110	£110	£105
England	£57	£59	£59	£67	£70	£68	£61	£65	£68	£77	£77	£80	£36	£35	£36	£39	£43	£43	£101	£109	£100	£108	£116	£109
	ALL TOURISM, Jan - Apr period						HOLIDAYS – Jan - Apr period						VFR – Jan - Apr period						BUSINESS – Jan - Apr period					
Av. £/Trip	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014
GB	£161	£155	£161	£174	£181	£178	£189	£191	£202	£211	£209	£218	£97	£90	£94	£102	£111	£109	£244	£223	£219	£245	£260	£239
England	£156	£151	£157	£171	£177	£175	£191	£193	£197	£213	£208	£220	£94	£86	£92	£98	£109	£105	£233	£218	£217	£241	£255	£235

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