

Great Britain Tourism Survey

June 2014 Update



Summary – June 2014 Update

ALL TOURISM

- The volume of domestic GB overnight trips taken in June 2014 was 1.3 million less than the same period for 2013, a decrease of -12%. All nations have experienced a decrease in volume of trips, Wales has the largest decrease (-15%), while England and Scotland are down -13% and -12% respectively.
- The FIFA World Cup started on 12th June and ran through into July, which may at least partially explain the decrease in domestic trips for June 2014 compared to June 2013.
- In line with the decreased number of trips, England and Scotland saw a similar drop in the total number of nights away on GB domestic trips (-16%, -10%) while nights on trips in Wales were up +1%.
- Conversely expenditure in Wales saw the biggest drop (-23%), while spend in England and Scotland was down -5% and -10% respectively, giving an overall reduction in spend for GB as a whole of -6%.
- There were 50.6 million GB domestic trips taken in the first half of 2014, a decline of -5% compared to the same period for 2013.

HOLIDAYS

- The majority of the 1.3 million reduction in GB trips for June were holiday trips, with 0.8 million fewer in June 2014 compared to June 2013, a -14% decline. Scotland saw the biggest drop (-26%) followed by England (-15%), while holidays to Wales remained on par with 2013.
- This is reflected in the total number of holiday bed nights for June, down -14% on June last year, and holiday expenditure was down by a similar -15%. The decrease in bed nights was more marked in Scotland (-19%) and England (-16%), while Wales saw an increase (+4%). The drop in spend was experienced by all 3 nations, England -14%, Scotland -21% and Wales -13%.
- Looking at the year-to-date view for holiday trip volumes, there were -2% fewer trips taken during January to June in 2014 compared to 2013, with 23.3 million holiday trips being taken in the January to June 2014 period.

VISITING FRIENDS & RELATIVES

- The trip type seeing the greatest percentage fall in June 2014 has been trips taken for the purpose of visiting friends and relatives, with a -21% reduction in the number of these. The volumes for England and Wales were down -22% and -37% respectively, while Scotland was up +11%.
- The total number of nights spent visiting friends and relatives decreased by -24% in June 2014 versus 2013. The total amount of money spent while on this type of trip also fell, by -3%.
- The volume of trips taken for the purpose of visiting friends and relatives from January to June 2014 was down -2% to 18.2m compared to 2013.

BUSINESS TOURISM

- In June 2014 business tourism trips grew by +19% compared to June 2013. Increases were seen from England (+22%) and Scotland (+18%), while Wales saw a decrease of -48%, on a very low base.
- Not only were the number of business trips up in June, but the average length of business trips increased compared to a year earlier, with a total of 27% more nights away on business. Expenditure rose in line with number of nights (+19%).
- However, despite the increase seen in June, the relatively low volume of business trips in the first four months of 2014 means that the volume of business trips in the year to date is still down compared to last year (7.7 million versus 8.7 million).

GB Domestic Tourism: Monthly Volume & Value 2014

ALL 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	5.702	5.532	-3.0%	7.418	6.932	-6.6%	8.408	6.957	-17.3%	9.357	10.172	+8.7%	11.178	11.269	+0.8%	11.020	9.699	-12.2%
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%	9.129	9.098	-0.3%	9.069	7.957	-12.5%

BEDNIGHTS	February			March			April			May			June					
	2013	2013	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2013	%ch	2013	2014	%ch
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%	31.933	31.494	-1.4%	33.778	29.045	-14.0%
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%	25.396	24.568	-3.3%	26.910	22.579	-16.1%

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	£940	£945	+0.5%	£1390	£1183	-14.9%	£1455	£1267	-12.9%	£1796	£1871	+4.2%	£2008	£2100	+4.6%	£2280	£2133	-6.4%
England	£766	£834	+8.9%	£1157	£973	-15.9%	£1198	£980	-18.2%	£1464	£1455	-0.6%	£1590	£1645	+3.5%	£1835	£1753	-4.5%

TRIPS	July			August			September			October			November			December			YTD- June		
	2013	2014	%ch	2013	2013	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			53.103	50.560	-4.8%
England																			44.065	41.333	-6.2%

BEDNIGHTS	July			August			September			October			November			December			YTD- June		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			147.142	139.478	-5.2%
England																			117.529	109.387	-6.9%

EXPENDITURE	July			August			September			October			November			December			YTD- June		
	2013	2014	%ch	2013	2014	%ch	2013	2013	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			£9870	£9499	-3.8%
England																			£8010	£7640	-4.6%

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* NB. TRIPS, NIGHTS and EXPENDITURE are all shown in units of millions



Fieldwork: 11 June- 27 July 2014
TNS Face-to-Face Omnibus Survey
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GB Domestic Tourism: Monthly Volume & Value 2014

HOLIDAYS

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	1.811	1.778	-1.8%	2.497	2.792	+11.8%	3.584	2.967	-17.2%	4.298	5.001	+16.4%	5.724	5.834	+1.9%	5.700	4.893	-14.2%
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%	4.522	4.491	-0.7%	4.482	3.810	-15.0%

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	3.904	4.154	+6.4%	5.843	6.687	+14.4%	12.009	8.288	-31.0%	12.954	16.246	+25.4%	18.953	18.613	-1.8%	19.962	17.117	-14.3%
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%	14.612	13.982	-4.3%	14.874	12.531	-15.8%

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	£348	£407	+17.0%	£489	£559	+14.3%	£766	£688	-10.2%	£941	£1083	+15.1%	£1229	£1279	+4.1%	£1491	£1269	-14.9%
England	£269	£358	+33.1%	£377	£445	+18.0%	£607	£530	-12.7%	£759	£799	+5.3%	£927	£970	+4.6%	£1166	£1003	-14.0%

TRIPS	July			August			September			October			November			December			YTD- June		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			23.614	23.265	-1.5%
England																			18.688	17.991	-3.7%

BEDNIGHTS	July			August			September			October			November			December			YTD- June		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			73.625	71.104	-3.4%
England																			55.727	53.032	-4.8%

EXPENDITURE	July			August			September			October			November			December			YTD- June		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			£5263	£5284	+0.4%
England																			£4104	£4105	0.0%

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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%	3.672	3.741	+1.9%	3.471	2.734	-21.2%
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%	3.081	3.142	+2.0%	3.019	2.352	-22.1%
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%	9.078	9.223	+1.6%	9.677	7.373	-23.8%
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%	7.628	7.599	-0.4%	8.366	5.946	-28.9%
EXPENDITURE																		
GB	£239	£262	+9.6%	£329	£273	-17.0%	£360	£275	-23.6%	£355	£469	+32.1%	£410	£415	+1.2%	£385	£374	-2.9%
England	£199	£234	+17.6%	£286	£228	-20.3%	£305	£226	-25.9%	£295	£377	+27.8%	£352	£326	-7.4%	£330	£316	-4.2%

	July			August			September			October			November			December			YTD- June		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
TRIPS																					
GB																			18.661	18.217	-2.4%
England																			16.061	15.622	-2.7%
BEDNIGHTS																					
GB																			48.423	46.794	-3.4%
England																			40.987	38.293	-6.6%
EXPENDITURE																					
GB																			£2078	£2067	-0.5%
England																			£1766	£1706	-3.4%

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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%	1.352	1.385	+2.4%	1.459	1.741	+19.3%
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%	1.169	1.198	+2.5%	1.231	1.506	+22.3%

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%	2.836	2.963	+4.5%	2.982	3.777	+26.7%
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%	2.280	2.529	+10.9%	2.591	3.404	+31.4%

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%	£321	£336	+4.7%	£346	£412	+19.1%
England	£262	£205	-21.8%	£443	£263	-40.6%	£222	£209	-5.9%	£362	£232	-35.9%	£268	£284	+6.0%	£290	£366	+26.2%

TRIPS	July			August			September			October			November			December			YTD- June		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			8.695	7.728	-11.1%
England																			7.447	6.561	-11.9%

BEDNIGHTS	July			August			September			October			November			December			YTD- June		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			19.696	17.248	-12.4%
England																			16.024	14.266	-11.0%

EXPENDITURE	July			August			September			October			November			December			YTD- June		
	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch	2013	2014	%ch
GB																			£2197	£1848	-15.9%
England																			£1846	£1558	-15.6%

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GB Domestic Tourism: Year to Date – 2009-2014

Trips, Bednights & Expenditure, Jan-Jun period

	ALL TOURISM, Jan - Jun period						HOLIDAYS, Jan - Jun period						VFR, Jan - Jun period						BUSINESS, Jan - Jun 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	54.638	54.336	56.162	54.661	53.103	50.560	25.291	24.552	25.486	24.569	23.614	23.265	19.353	19.605	19.982	18.716	18.661	18.217	8.645	8.476	8.691	9.397	8.695	7.728
England	45.863	44.825	46.369	45.404	44.065	41.333	20.264	19.333	19.976	19.425	18.688	17.991	16.994	17.043	17.345	16.344	16.061	15.622	7.436	7.026	7.417	7.936	7.447	6.561
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	162.292	155.110	162.048	151.376	147.142	139.478	86.383	79.728	83.987	76.883	73.625	71.104	51.109	51.357	52.683	48.343	48.423	46.794	21.177	18.937	18.967	21.527	19.696	17.248
England	132.629	122.399	130.504	121.879	117.529	109.387	67.834	61.624	64.279	59.006	55.727	53.032	43.981	42.957	44.871	40.919	40.987	38.293	17.777	14.297	15.734	18.071	16.024	14.266
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	£9,311	£8,788	£9,644	£9,977	£9,870	£9,499	£4,963	£4,800	£5,408	£5,432	£5,263	£5,284	£1,957	£1,859	£1,939	£1,944	£2,078	£2,067	£2,210	£1,887	£2,054	£2,323	£2,197	£1,848
England	£7,636	£7,045	£7,691	£8,102	£8,010	£7,640	£3,967	£3,762	£4,127	£4,314	£4,104	£4,105	£1,687	£1,557	£1,637	£1,631	£1,766	£1,706	£1,832	£1,530	£1,725	£1,928	£1,846	£1,558

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GB Domestic Tourism: Year to Date – 2009-2014

Trip Characteristics, Jan-Jun period

	ALL TOURISM, Jan - Jun period						HOLIDAYS, Jan - Jun period						VFR, Jan - Jun period						BUSINESS, Jan - Jun 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	2.97	2.85	2.89	2.77	2.77	2.76	3.42	3.25	3.30	3.13	3.12	3.06	2.64	2.62	2.64	2.58	2.59	2.57	2.45	2.23	2.18	2.29	2.27	2.23
England	2.89	2.73	2.81	2.68	2.67	2.65	3.35	3.19	3.22	3.04	2.98	2.95	2.59	2.52	2.59	2.50	2.55	2.45	2.39	2.03	2.12	2.28	2.15	2.17
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	£57	£60	£66	£67	£68	£57	£60	£64	£71	£71	£74	£38	£36	£37	£40	£43	£44	£104	£100	£108	£108	£112	£107
England	£58	£58	£59	£66	£68	£70	£58	£61	£64	£73	£74	£77	£38	£36	£36	£40	£43	£45	£103	£107	£110	£107	£115	£109
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	£170	£162	£172	£183	£186	£188	£196	£196	£212	£221	£223	£227	£101	£95	£97	£104	£111	£113	£256	£223	£236	£247	£253	£239
England	£166	£157	£166	£178	£182	£185	£196	£195	£207	£222	£220	£228	£99	£91	£94	£100	£110	£109	£246	£218	£233	£243	£248	£237

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