

GB TOURISM SURVEY - April 2014

SUMMARY OF RESULTS

1. Headlines

- In April 2014, there were 10.2 million domestic overnight trips in Great Britain, +9% more than in April 2013, when there were 9.4 million trips.
- Nights and expenditure were also up compared to the same month last year. Nights increased by +22% to 30.7m, and spend increased by +4% to £1.9bn.
- For England, trips and nights increased against April last year, with trips up +5% to 8.2m and nights up +16% to 23.3m. Spend remained flat (-1%), at £1.5bn.
- For the year to date, trips were down in Great Britain by -4% to 29.6 million. Nights and spend were also down, by -3% and -6% respectively.

2. Context

- April 2014 benefited from having both Easter bank holidays, compared with April 2013 which only had one. This may have resulted in increased trip taking this April. The month of April was also one of the warmest Aprils to date, and much warmer than last April.

3. Trip Characteristics

- In the year to April, there was an increase in all trip types apart from business trips.
- Holiday trips increased by +3% to 12.5m, with nights and spend up +2% and +8% respectively, increasing to 35.4m nights and £2.7bn in spend. Increases are being driven by an increase in longer breaks of 4+ nights, with trips in this category up +9% in the year to April.
- Trips and nights on visits to friends and relatives (VFR) were also up (+2% each respectively), with spend remaining flat (0%), at £1.3bn. VFR trips for leisure purposes are driving increases (+16%), while non-holiday VFR trips have declined (-15%).
- Business trips (-22%), nights (-24%) and spend (-28%) have all declined for the year so far.
- Trips have increased in both Seaside and Countryside locations (+7% and +3%), declining in large cities and small towns (-8% and -6%).
- There have been declines in trip taking across all age groups and social grades. However, the 16-24 age category has declined to a lesser extent (-1% for trips), with expenditure having shown an increase (+13%).

4. Overseas Travel by UK Residents

- The number of trips taken abroad by UK residents in April decreased by -2% compared to April 2013, with expenditure down -24%. In the year to date volume rose by +5% while spend fell by -11%.

5. Other Tourism Surveys

- Both room and bedspace occupancy in April showed increases, of +2% for room, rising to 68%, and +4% for bedspace, rising to 53%.
- The volume of day visits in GB in the three months to April 2014 increased by +3% when compared with the same period last year, rising from 353 million to 362 million. The value of those visits also increased during the same period, rising to £12.2 billion (+3%).
- The April Tourism Business Monitor found that in the year to April, more accommodation providers and attractions had increased visitors in 2014 so far than those who saw a decrease. Satisfaction for the year so far has been high, with at least a third of businesses saying they were 'very' satisfied with their performance.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
April '14									
GB	9.4	10.2	+9%	25.2	30.7	+22%	1,796	1,871	+4%
England	7.8	8.2	+5%	20.2	23.3	+16%	1,464	1,455	-1%
Jan-April '14									
GB	30.9	29.6	-4%	81.4	78.9	-3%	5,582	5,267	-6%
England	25.8	24.3	-6%	65.2	62.2	-5%	4,585	4,242	-8%

Purpose of Trip – April 2014

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
GB									
Holiday	4.3	5.0	+16%	13.0	16.2	+25%	941	1,083	+15%
Business	1.7	1.2	-29%	4.0	2.9	-27%	442	270	-39%
VFR	3.0	3.7	+23%	7.6	11.1	+47%	355	469	+32%
England									
Holiday	3.5	3.8	+10%	10.3	11.7	+14%	759	799	+5%
Business	1.4	1.1	-24%	3.0	2.5	-17%	362	232	-36%
VFR	2.6	3.1	+20%	6.4	8.7	+36%	295	377	+28%

Purpose of Trip – Year to Date (January - April 2014)

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	12.2	12.5	+3%	34.7	35.4	+2%	2,544	2,736	+8%
Business	5.9	4.6	-22%	13.9	10.5	-24%	1,530	1,100	-28%
VFR	11.5	11.7	+2%	29.7	30.2	+2%	1,238	1,278	0%
England									
Holiday	9.7	9.7	0%	26.2	26.5	+1%	2,012	2,131	+6%
Business	5.0	3.9	-24%	11.2	8.3	-25%	1,289	908	-30%
VFR	10.0	10.1	+2%	25.0	24.7	-1%	1,084	1,064	-2%

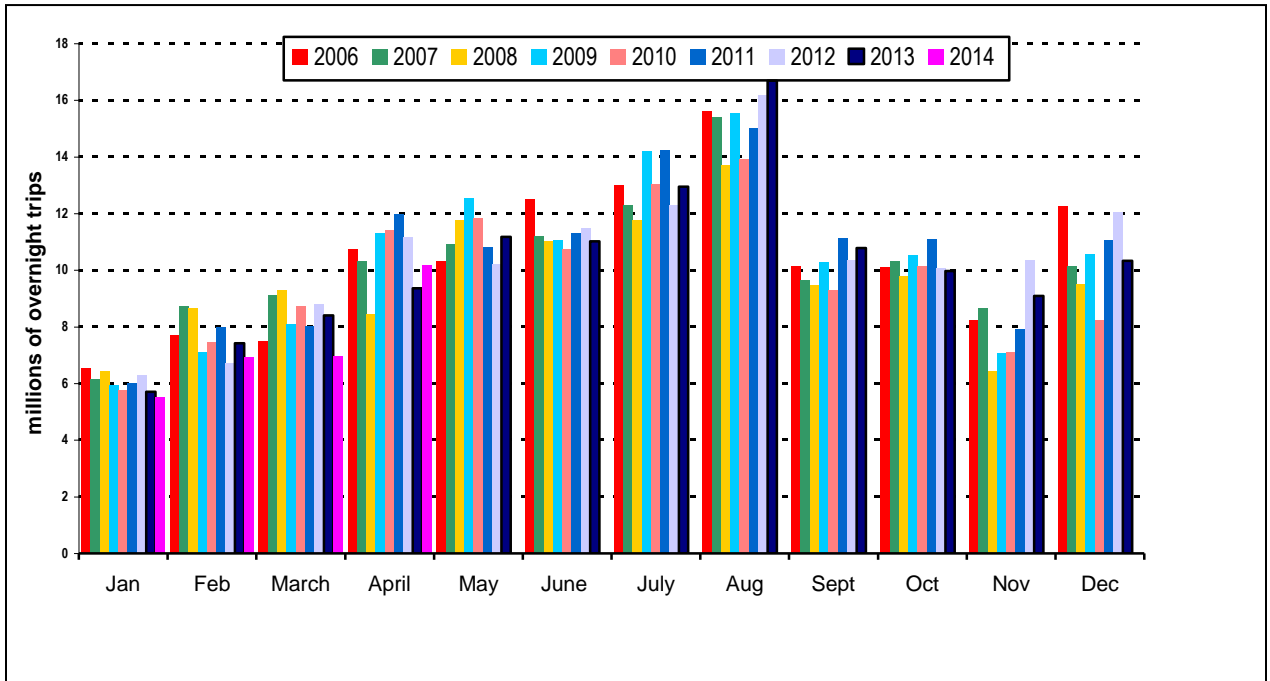
Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2013	2014	% +/-	2013	2014	% +/-
April 2014	4.9	4.8	-2%	2.8	2.1	-24%
Jan '14 – Apr '14	15.1	15.9	+5%	8.8	7.8	-11%
May '13 – Apr '14	65.0	67.7	+4%	37.5	38.9	+4%

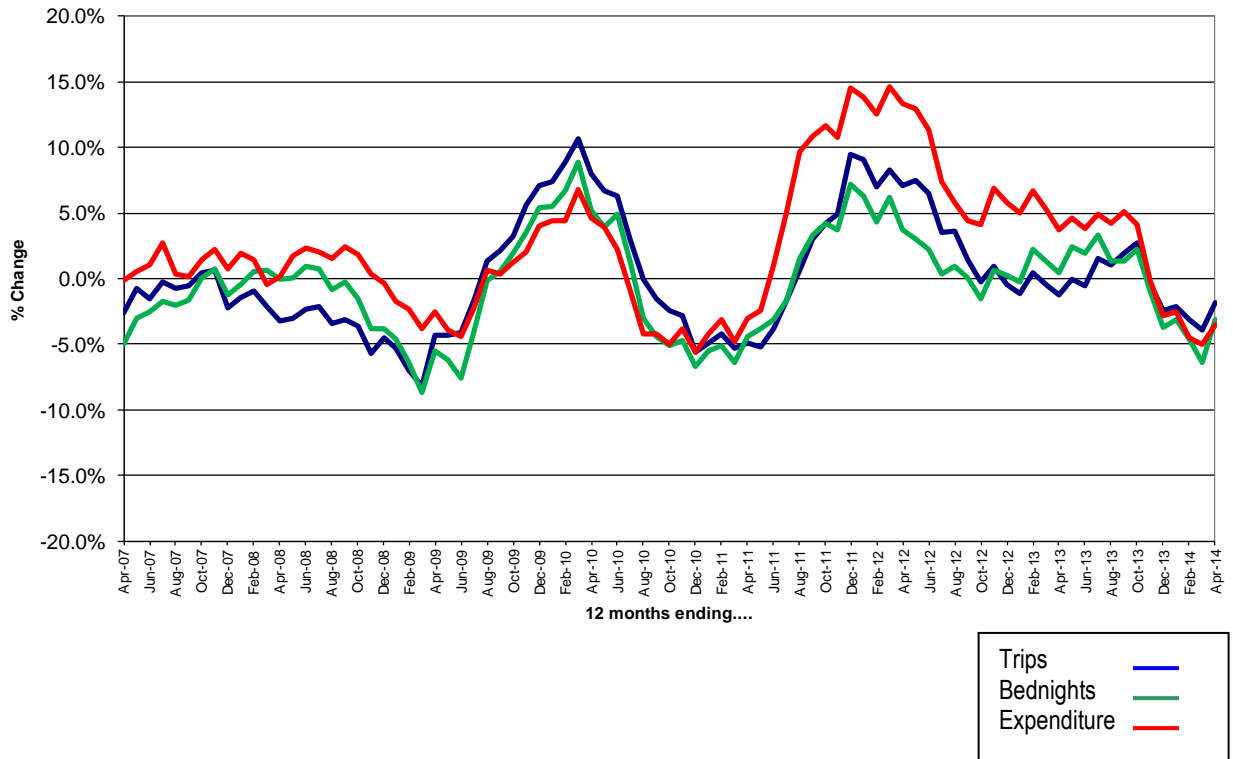
TREND CHARTS



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 (April 2013 vs. April 2014)
- Year to date (Jan-Apr 2013 vs. Jan-Apr 2014)
- 12 month rolling (March-Apr 2013 vs. March-Apr 2014)

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, 2013

Comparisons with equivalent periods, 2013

LEGEND: Above Average Performance Average Performance Below Average Performance

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.

	Great Britain											
	Month: April 2014			Unweighted Trips	YTD: January - April 2014			Unweighted Trips	12 month rolling May 2013 - Apr 2014			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	8.8%	24.1%	5.2%		-4.2%	-2.6%	-5.4%		-1.9%	-2.8%	-3.4%	
PURPOSE:												
Pure Holiday	16.4%	25.4%	15.1%	738	2.9%	1.9%	7.5%	1806	1.9%	-0.1%	1.7%	8318
- 1-3 nights holiday	3.8%	10.4%	2.9%	461	0.9%	4.2%	5.8%	1322	1.0%	2.2%	1.5%	5151
- 4+ nights holiday	48.7%	37.7%	35.2%	277	9.0%	-0.2%	11.4%	479	3.4%	-1.3%	2.0%	3167
VFR (on holiday)	43.9%	68.3%	31.5%	376	15.7%	13.4%	10.7%	1079	5.2%	3.7%	-0.1%	3874
HOLIDAY (TOTAL)	24.3%	37.1%	18.3%	1113	7.2%	5.8%	8.3%	2885	2.9%	1.0%	1.4%	12193
VFR (non-holiday)	-5.1%	8.3%	33.3%	175	-14.5%	-15.2%	-16.0%	635	-7.6%	-8.6%	-14.0%	2540
VFR (TOTAL)	23.3%	46.8%	32.1%	550	1.9%	1.8%	-0.4%	1714	-0.3%	-0.9%	-5.7%	6414
Business	-28.1%	-18.9%	-36.6%	141	-21.6%	-22.1%	-27.3%	528	-12.9%	-17.9%	-13.2%	1895
Regions:												
West Midlands	-29.2%	-19.8%	-24.7%	95	-21.6%	-20.0%	-24.1%	278	-2.3%	-5.1%	-4.6%	1140
East of England	17.5%	36.6%	39.0%	117	11.8%	22.4%	23.8%	334	-6.7%	-8.6%	-9.1%	1293
East Midlands	-7.2%	17.6%	10.0%	91	-7.6%	7.2%	0.4%	256	-4.4%	-3.8%	-9.3%	1086
London	-14.3%	-27.3%	-28.2%	135	-13.1%	-26.0%	-14.8%	443	-4.6%	-12.0%	-8.6%	1540
North West	13.6%	29.5%	6.3%	186	-5.4%	0.3%	3.7%	494	-1.7%	-1.0%	-3.6%	1930
North East	-5.9%	-7.1%	-42.0%	40	-27.5%	-20.4%	-39.3%	124	-19.3%	-18.1%	-20.7%	511
South East	18.8%	32.5%	28.1%	211	-1.8%	-0.8%	-2.7%	567	4.4%	6.0%	-5.7%	2549
South West	9.9%	18.9%	5.3%	195	-4.5%	-10.7%	-3.0%	552	0.0%	-2.5%	2.0%	2755
Yorkshire & the Humber	41.1%	86.8%	4.5%	128	3.7%	14.2%	-18.6%	398	-5.7%	-0.4%	-6.5%	1452
LOCATION TYPE:												
Seaside	38.3%	55.4%	81.5%	321	7.3%	8.9%	18.8%	673	0.5%	-2.7%	-3.1%	3612
Large city/ large town	-4.4%	2.4%	-16.9%	567	-8.0%	-8.6%	-11.2%	1841	-2.5%	-2.0%	-4.6%	6612
Small town	3.1%	9.3%	-5.6%	333	-6.4%	-7.7%	-13.3%	973	-6.5%	-5.6%	-8.9%	3968
Countryside/ village	37.8%	57.8%	18.1%	293	3.4%	6.0%	3.1%	751	1.3%	-1.2%	5.0%	3295
AGE:												
16-24	17.8%	34.0%	29.4%	159	-1.2%	1.6%	12.9%	543	2.5%	-2.8%	-0.4%	1968
25-34	18.5%	34.3%	15.2%	262	-2.0%	3.2%	-4.9%	743	-2.8%	-1.9%	-8.0%	3022
35-44	3.6%	32.7%	-2.7%	306	-9.0%	-7.1%	-11.7%	780	-0.7%	-4.0%	-6.1%	3400
45-54	12.2%	34.8%	-0.2%	278	-7.2%	-8.7%	-13.7%	756	-8.3%	-7.1%	-4.3%	2976
55+	2.2%	6.6%	3.0%	453	-0.8%	-0.4%	0.5%	1322	0.7%	-0.2%	0.5%	5707
SEG:												
AB	15.7%	34.6%	0.0%	502	-0.8%	2.9%	-8.1%	1458	-2.0%	-2.8%	-5.7%	5756
C1	-4.6%	3.3%	-2.2%	418	-7.2%	-8.7%	-5.8%	1286	0.5%	-3.2%	0.1%	5247
C2	6.4%	35.5%	20.4%	277	-4.0%	4.1%	7.1%	712	-4.3%	-1.5%	-3.9%	3093
DE	27.1%	35.7%	36.1%	261	-8.2%	-13.4%	-7.8%	688	-3.9%	-3.6%	-2.8%	2979
CHILDREN IN HH:												
Any	24.8%	67.6%	23.9%	594	-2.5%	6.7%	-7.4%	1409	-1.7%	-1.4%	-7.9%	6038
None	1.2%	6.9%	-1.8%	864	-4.9%	-6.2%	-4.6%	2736	-2.0%	-3.5%	-1.6%	11037
ACCOMMODATION:												
Commercial accom	5.8%	17.1%	0.8%	902	-4.3%	-1.9%	-4.7%	2441	-1.1%	-1.5%	-2.0%	10198
- Serviced accom	-5.1%	2.9%	-13.9%	609	-8.3%	-6.1%	-9.6%	1685	-3.0%	-3.2%	-2.9%	6885
- Hotel/motel/guesthouse	-7.0%	-1.8%	-17.5%	543	-8.9%	-9.7%	-12.2%	1700	-2.7%	-3.9%	-3.1%	6147
- Bed & Breakfast	0.5%	13.6%	29.2%	55	-9.1%	4.4%	17.6%	162	-7.5%	-8.1%	-10.0%	670
Total self-catering rented	48.4%	42.6%	64.8%	281	17.7%	11.5%	19.1%	511	5.9%	2.4%	1.9%	3133
- Camping & Caravanning (inc. owned caravans)	46.9%	40.1%	73.8%	198	12.5%	4.7%	31.1%	299	5.0%	-2.5%	2.3%	2259
- Other self-catering rented	68.2%	61.9%	63.8%	141	22.4%	15.9%	14.8%	302	4.3%	3.7%	1.8%	1332
Hostels	45.0%	19.5%	49.0%	12	43.1%	-12.7%	4.2%	27	-29.4%	-22.5%	-46.8%	124
Own home/friends'/relatives'	17.7%	38.2%	22.1%	562	-2.1%	-3.2%	-6.2%	1682	-2.0%	-4.2%	-6.4%	6771

	England											
	Month: April 2014			Unweighted Trips	YTD: January - April 2014			Unweighted Trips	12 month rolling May 2013 - Apr 2014			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	5.2%	15.6%	-0.6%		-6.1%	-4.6%	-7.5%		-6.1%	-4.6%	-7.5%	
PURPOSE:												
Pure Holiday	9.5%	14.4%	5.3%	558	0.1%	1.1%	5.9%	1396	0.3%	-1.6%	-1.1%	6520
- 1-3 nights holiday	-1.6%	3.8%	-9.5%	356	-3.0%	1.1%	2.3%	1032	-0.9%	0.1%	-1.4%	4102
- 4+ nights holiday	39.0%	23.5%	29.6%	202	10.6%	1.0%	14.7%	363	2.5%	-2.6%	-0.8%	2410
VFR (on holiday)	38.7%	56.2%	30.1%	312	15.9%	11.3%	11.5%	919	6.6%	6.3%	0.6%	3313
HOLIDAY (TOTAL)	18.4%	26.3%	10.3%	669	5.7%	4.7%	7.2%	2313	2.3%	0.7%	-0.8%	9833
VFR (non-holiday)	-5.7%	0.3%	23.5%	151	-14.6%	-17.8%	-19.3%	559	-8.0%	-8.0%	-11.6%	2224
VFR (TOTAL)	20.0%	36.2%	27.8%	462	1.7%	-1.0%	-1.8%	1478	0.2%	0.7%	-4.3%	5538
Business	-24.1%	-17.1%	-35.9%	127	-23.6%	-25.3%	-29.6%	442	-12.6%	-20.0%	-14.5%	1601
Regions:												
West Midlands	-29.2%	-19.8%	-24.7%	95	-21.6%	-20.0%	-24.1%	278	-2.3%	-5.1%	-4.6%	1140
East of England	17.5%	36.6%	39.0%	117	11.8%	22.4%	23.8%	334	-6.7%	-8.6%	-9.1%	1293
East Midlands	-7.2%	17.6%	10.0%	91	-7.6%	7.2%	0.4%	256	-4.4%	-3.8%	-9.3%	1086
London	-14.3%	-27.3%	-28.2%	135	-13.1%	-26.0%	-14.8%	443	-4.6%	-12.0%	-8.6%	1540
North West	13.6%	29.5%	6.3%	186	-5.4%	0.3%	3.7%	494	-1.7%	-1.0%	-3.6%	1930
North East	-5.9%	-7.1%	-42.0%	40	-27.5%	-20.4%	-39.3%	124	-19.3%	-18.1%	-20.7%	511
South East	18.8%	32.5%	28.1%	211	-1.8%	-0.8%	-2.7%	567	4.4%	6.0%	-5.7%	2549
South West	9.9%	18.9%	5.3%	195	-4.5%	-10.7%	-3.0%	552	0.0%	-2.5%	2.0%	2755
Yorkshire & the Humber	41.1%	86.8%	4.5%	128	3.7%	14.2%	-18.6%	398	-5.7%	-0.4%	-6.5%	1452
LOCATION TYPE:												
Seaside	27.4%	46.6%	55.2%	247	1.8%	4.7%	7.1%	521	-2.5%	-6.5%	-7.5%	2634
Large city/ large town	-6.5%	-3.6%	-18.5%	489	-10.9%	-12.6%	-13.8%	1577	-2.4%	-2.1%	-5.1%	5723
Small town	0.8%	0.2%	-7.4%	255	-6.7%	-8.3%	-12.7%	779	-5.8%	-5.6%	-10.0%	3213
Countryside/ village	37.2%	47.8%	11.8%	229	6.8%	11.8%	10.8%	600	1.8%	1.2%	3.5%	2630
AGE:												
16-24	-3.2%	12.1%	4.5%	113	-10.5%	-8.9%	2.3%	429	-1.6%	-4.7%	-7.6%	1635
25-34	12.2%	25.1%	1.0%	205	-2.5%	4.6%	-9.9%	608	-4.8%	-3.7%	-10.4%	2470
35-44	4.9%	29.0%	1.1%	244	-11.0%	-10.1%	-12.4%	630	-1.6%	-3.8%	-8.4%	2800
45-54	6.9%	23.8%	-3.6%	225	-10.3%	-9.1%	-17.3%	617	-8.2%	-8.9%	-5.3%	2443
55+	3.8%	2.0%	-1.2%	393	0.6%	-1.1%	3.3%	1119	2.3%	0.9%	1.0%	4718
SEG:												
AB	5.5%	16.4%	-13.1%	402	-6.5%	-3.8%	-12.3%	1191	-3.6%	-4.9%	-8.3%	4771
C1	-6.5%	-4.6%	-5.6%	347	-7.9%	-11.6%	-8.6%	1068	0.4%	-3.7%	-2.3%	4331
C2	16.1%	50.9%	44.3%	220	1.4%	15.5%	18.7%	577	-1.8%	3.2%	-0.7%	2536
DE	25.4%	34.8%	28.9%	208	-9.4%	-12.6%	-11.3%	564	-6.2%	-6.0%	-6.0%	2407
CHILDREN IN HH:												
Any	19.5%	59.3%	24.6%	473	-5.8%	5.6%	-12.8%	1139	-3.2%	-1.7%	-10.9%	4964
None	-1.5%	-1.0%	-9.5%	703	-6.2%	-8.4%	-5.4%	2259	-2.1%	-4.0%	-2.7%	9099
ACCOMMODATION:												
Commercial accom	4.2%	13.2%	-3.2%	734	-6.7%	-4.3%	-6.5%	1987	-2.4%	-4.2%	-4.0%	8232
- Serviced accom	-5.8%	0.1%	-17.9%	512	-10.7%	-6.7%	-11.4%	1551	-3.9%	-3.6%	-3.8%	5669
- Hotel/motel/guesthouse	-6.5%	-2.1%	-19.8%	464	-10.7%	-9.7%	-13.4%	1411	-3.6%	-4.1%	-3.8%	5082
- Bed & Breakfast	-3.3%	3.7%	7.1%	42	-15.5%	7.1%	12.0%	124	-8.4%	-8.9%	-13.3%	539
Total self-catering rented	43.6%	35.7%	60.1%	211	14.7%	5.7%	17.2%	395	3.0%	-3.5%		