

GB TOURISM SURVEY – August 2014 SUMMARY OF RESULTS

1. Headlines

- In August 2014, there were 14.4 million domestic overnight trips in Great Britain, down by -14% on August 2013, when there were 16.7 million trips (the highest volume recorded by the current survey).
- Bednights and expenditure also fell, with nights down -12% to 56.2 million, and expenditure down -4% to £3.3 billion.
- Looking at England alone, trips were also down compared to August last year, at 11.4 million (-15%). Nights and expenditure were also down, by -13% and -6% respectively.
- In the year to date, trips in Great Britain were down by -7% to 77.3 million. Nights and spend were also down, by -6% and -3% respectively.

2. Context

- August weather was unusually wet, with rainfall 156% above average for the month. There was some localized flooding, wet and stormy weather associated with ex-Hurricane Bertha in the middle of the month, and a wet August bank holiday, particularly in the south of England. Average temperature was 1 degree below the average for 1981-2010.

3. Trip Characteristics – January - August 2014

- In the year to August, holiday trips declined by -4% to 39.1m, with nights down -6% and expenditure around the same as last year at £9.5 billion (0.0% change).
- Visits to friends and relatives (VFR) trips (-6%), nights (-6%) and spend (-2%) were also down. However, VFR trips for leisure purposes are up slightly for the year (+2%), compared to -17% for non-leisure VFR.
- Business trips (-10%), nights (-8%) and spend (-11%) have all declined for the year so far.
- So far this year, trips to all English regions are down, except for the East of England (+2%), and Yorkshire and the Humber, where trips are flat (-0.2%).
- There have also been declines to all destination types, except the Seaside, where trips are flat (-0.4%) and expenditure has actually increased (+3%).

4. Overseas Travel by UK Residents

- The number of trips taken abroad by UK residents in August was flat compared to last year (-1%). In the year to date, trips are up +4%.

5. Other Tourism Surveys

- Room occupancy in England in August showed a slight increase compared to August 2013, rising to 79%, while bedspace occupancy decreased by -1% to 63%.
- The volume of day visits in Great Britain in the three months to August 2014 decreased by -4% when compared with the same period last year, falling from 468 million to 452 million. The value of those visits also fell during the same period, at £15.2 billion (down -8% from £16.6 billion).

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
August '14									
GB	16.7	14.4	-14%	63.9	56.2	-12%	3,438	3,287	-4%
England	13.4	11.4	-15%	49.0	42.7	-13%	2,1681	2,518	-6%
Jan-Aug '14									
GB	82.7	77.3	-7%	259.7	243.5	-6%	16,072	15,600	-3%
England	67.8	62.7	-8%	204.0	188.5	-8%	12,867	12,392	-4%

Purpose of Trip – August 2014

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
GB									
Holiday	10.1	8.8	-13%	44.0	38.6	-12%	2,493	2,359	-5%
Business	1.4	1.3	-9%	3.3	3.9	+18%	339	316	-7%
VFR	4.9	4.1	-16%	15.6	12.9	-18%	526	571	+9%
England									
Holiday	7.8	6.6	-16%	32.4	27.8	-14%	1,902	1,741	-9%
Business	1.2	1.0	-13%	2.6	3.1	+19%	287	269	-6%
VFR	4.1	3.5	-14%	13.1	11.0	-17%	423	471	+11%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	40.9	39.1	-4%	149.4	140.7	-6%	9,535	9,531	0%
Business	11.7	10.6	-10%	27.0	24.9	-8%	2,936	2,602	-11%
VFR	27.3	25.7	-6%	75.6	71.3	-6%	3,139	3,083	-2%
England									
Holiday	32.1	30.0	-6%	111.8	103.8	-7%	7,391	7,275	-2%
Business	10.0	9.0	-10%	22.0	20.4	-7%	2,460	2,224	-10%
VFR	23.3	22.0	-5%	63.4	59.1	-7%	2,606	2,547	-2%

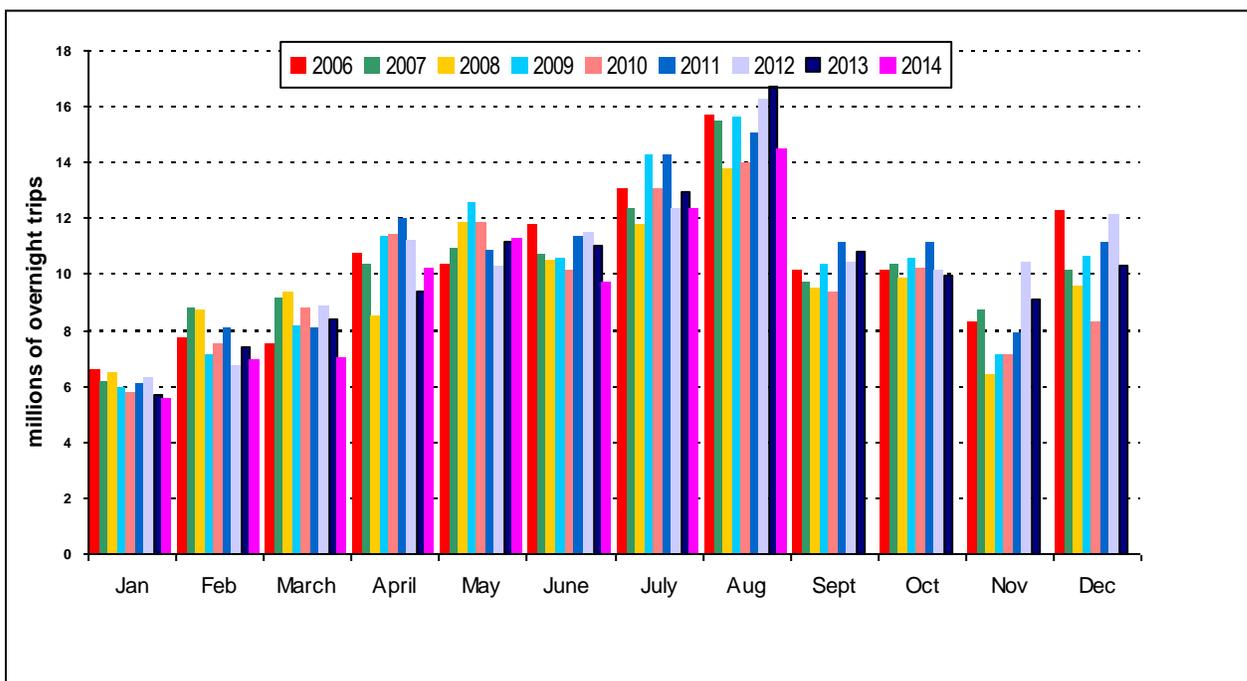
Outbound Travel – UK Residents

	TRIPS (MILLIONS)		
	2013	2014	% +/-
August 2014	7.8	7.8	-1%
Jan '14 – Aug '14	40.0	41.4	+4%
Sep '13 – Aug '14	57.9	60.0	+4%

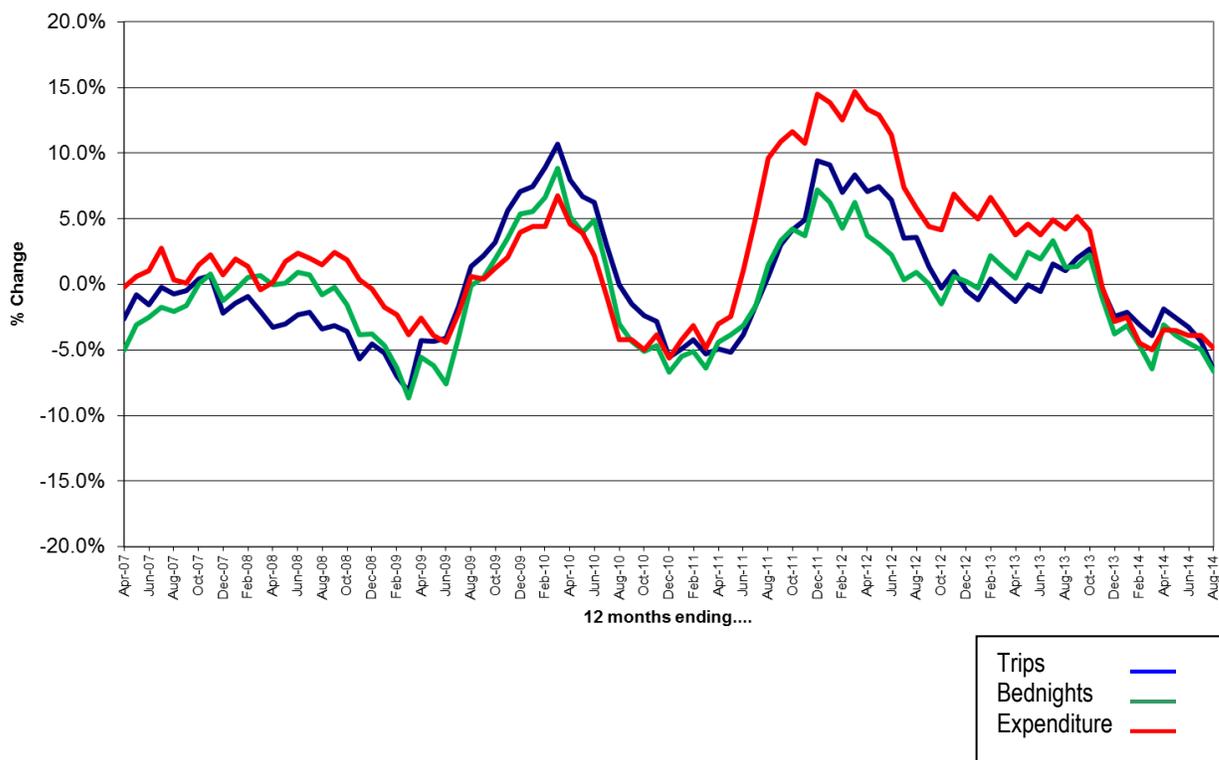
Please note: During the data processing for the September data release the Office for National Statistics (ONS) discovered an error in the derivation of total expenditure. This error affects the previously released expenditure estimates for January to September 2014. To allow time to fully investigate the error and to quality assure the data, the ONS has removed the expenditure data from the Overseas Travel and Tourism statistical bulletin. Corrected data will be published for all months, January to September 2014, and Quarter 1 and 2. The ONS will announce these corrections prior to their release. In light of this VisitEngland has removed all 2014 expenditure figures from this file and will be in a position to update expenditure figures once we have been informed of the corrected figures by VisitBritain and the ONS.

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 (August 2013 vs. August 2014)
- Year to date (Jan-Aug 2013 vs. Jan-Aug 2014)
- 12 month rolling (Sep-Aug 2013 vs. Sep-Aug 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 (Yellow), Average Performance (Green), Below Average Performance (Red)

NOTE: In the tables below, average performance refers to the total trips/night/expense 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: Aug 2014			Unweighted Trips	YTD: January - Aug 2014			Unweighted Trips	12 month rolling Sep 2013 - Aug 2014			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-13.6%	-12.1%	-4.4%	2049	-6.6%	-6.2%	-2.9%	10818	-6.5%	-6.5%	-4.8%	16101
PURPOSE:												
Pure Holiday	-12.5%	-12.1%	-5.4%	1294	-4.3%	-5.8%	0.0%	5683	-3.9%	-5.4%	-1.1%	7964
- 1-3 nights holiday	-14.9%	-13.1%	-6.6%	603	-3.8%	-1.7%	0.6%	3439	-3.2%	-1.2%	0.2%	4918
- 4+ nights holiday	-10.1%	-11.8%	-4.7%	691	-5.2%	-7.8%	-0.6%	2244	-5.0%	-7.6%	-2.4%	2946
VFR (on holiday)	-19.4%	-21.3%	6.1%	378	1.7%	0.2%	3.5%	2333	-1.2%	-3.0%	-3.8%	3710
HOLIDAY (TOTAL)	-14.2%	-14.0%	-3.9%	1671	-2.7%	-4.4%	0.6%	8016	-3.0%	-4.7%	-1.6%	11574
VFR (non-holiday)	-9.9%	-8.5%	14.2%	201	-16.5%	-15.7%	-10.1%	1378	-13.9%	-12.3%	-17.2%	2312
VFR (TOTAL)	-16.2%	-17.7%	8.6%	578	-6.1%	-5.7%	-1.8%	3711	-6.6%	-6.4%	-9.2%	6022
Business	-9.2%	18.0%	-6.8%	139	-10.0%	-7.8%	-11.4%	1156	-9.7%	-8.7%	-7.8%	1812
Regions:												
West Midlands	-34.4%	-28.3%	-17.1%	87	-22.7%	-25.0%	-17.3%	616	-15.3%	-18.9%	-12.1%	1013
East of England	-8.4%	-0.3%	-14.2%	170	2.4%	12.4%	24.6%	867	-5.3%	3.5%	10.4%	1265
East Midlands	-13.4%	-14.1%	9.8%	129	-9.2%	-3.0%	0.3%	685	-10.3%	-6.0%	-8.3%	1028
London	-11.6%	-3.6%	6.6%	148	-8.0%	-12.8%	0.3%	980	-7.2%	-10.0%	-4.5%	1491
North West	-2.1%	16.9%	8.7%	227	-2.6%	4.3%	4.0%	1232	-0.5%	2.9%	1.2%	1885
North East	-4.6%	-1.3%	-12.9%	57	-13.8%	-13.1%	-27.3%	327	-16.0%	-19.5%	-29.6%	478
South East	-23.1%	-19.7%	-11.6%	284	-12.6%	-14.9%	-11.3%	1492	-11.0%	-13.0%	-15.5%	2284
South West	-18.1%	-20.9%	-9.0%	361	-7.6%	-11.1%	-3.9%	1711	-2.9%	-6.3%	0.0%	2553
Yorkshire & the Humber	-9.5%	-13.8%	-4.3%	178	-0.2%	-1.7%	-8.8%	970	-5.0%	-6.0%	-11.0%	1401
LOCATION TYPE:												
Seaside	-8.0%	-3.6%	-0.7%	650	-0.4%	0.8%	3.0%	2557	-1.3%	-0.6%	-2.1%	3513
Large city/ large town	-11.0%	-11.2%	-6.5%	634	-6.1%	-6.5%	-5.2%	4082	-4.7%	-4.7%	-5.4%	6333
Small town	-14.8%	-15.4%	4.4%	415	-9.1%	-11.3%	-4.3%	2416	-11.2%	-11.7%	-7.8%	3690
Countryside/ village	-22.3%	-20.8%	-10.4%	426	-8.7%	-9.1%	-2.7%	2080	-8.7%	-10.1%	-2.8%	2983
AGE:												
16-24	-16.1%	-24.7%	-14.0%	190	-11.7%	-14.8%	1.2%	1164	-9.5%	-14.4%	-3.6%	1760
25-34	-17.9%	-13.4%	-2.1%	328	-8.7%	-5.9%	-5.2%	1893	-8.5%	-5.5%	-7.8%	2779
35-44	-14.3%	-8.2%	2.3%	502	-10.2%	-8.1%	-6.2%	2194	-7.7%	-5.3%	-6.7%	3206
45-54	-11.0%	-18.1%	-15.6%	383	-4.2%	-5.9%	-7.0%	1949	-6.3%	-8.4%	-5.6%	2873
55+	-11.6%	-6.4%	1.3%	636	-2.2%	-2.5%	2.1%	3618	-3.4%	-3.8%	-2.0%	5482
SEG:												
AB	-10.7%	-2.0%	2.4%	661	-0.2%	2.2%	0.6%	3711	-1.9%	0.3%	-1.6%	5518
C1	-14.2%	-16.0%	-1.7%	616	-9.1%	-8.2%	-4.0%	3329	-7.2%	-7.4%	-4.8%	4963
C2	-16.5%	-25.7%	-13.9%	362	-11.7%	-13.4%	-4.7%	1865	-12.0%	-14.5%	-9.2%	2788
DE	-16.3%	-10.6%	-17.2%	409	-13.0%	-14.7%	-11.7%	1913	-11.5%	-11.7%	-11.5%	2832
CHILDREN IN HH:												
Any	-8.0%	-9.1%	7.3%	969	-3.3%	-1.7%	-0.2%	4078	-3.8%	-2.0%	-3.2%	5825
None	-17.3%	-14.2%	-10.6%	1080	-8.2%	-8.5%	-4.0%	6741	-7.7%	-8.5%	-5.4%	10276
ACCOMMODATION:												
Commercial accom	-10.2%	-6.7%	-0.7%	1369	-4.9%	-4.3%	-1.0%	6864	-4.9%	-4.8%	-2.8%	9723
- Serviced accom	-10.4%	-1.8%	-2.7%	705	-5.2%	-3.5%	-3.6%	4509	-5.8%	-5.9%	-4.1%	6647
- Hotel/motel/guesthouse	-11.2%	-3.7%	-3.4%	605	-5.5%	-5.9%	-4.9%	3999	-5.7%	-7.3%	-4.1%	5937
- Bed & Breakfast	-4.8%	25.3%	18.2%	82	-8.5%	2.9%	14.5%	447	-9.7%	-3.0%	0.9%	630
Total self-catering rented	-12.8%	-12.8%	0.3%	644	-5.3%	-6.3%	3.9%	2233	-3.8%	-4.5%	0.7%	2863
- Camping & Caravanning (inc. owned caravans)	-9.7%	-5.2%	-8.1%	518	-5.5%	-8.7%	-1.6%	1693	-20.6%	-8.3%	-3.4%	1739
- Other self-catering rented	-10.2%	-14.6%	12.4%	228	5.5%	0.9%	8.8%	952	4.3%	0.8%	3.2%	1296
Hostels	-21.1%	14.3%	50.0%	9	5.2%	-12.6%	28.8%	57	5.1%	2.9%	-14.6%	115
Own home/friends/relatives'	-18.6%	-17.9%	-7.5%	674	-8.2%	-8.1%	-8.5%	3918	-7.8%	-8.0%	-11.5%	6305

	England											
	Month: Aug 2014			Unweighted Trips	YTD: January - Aug 2014			Unweighted Trips	12 month rolling Sep 2013 - Aug 2014			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-14.9%	-12.9%	-6.1%	1615	-7.5%	-7.6%	-3.7%	8777	-6.7%	-7.2%	-5.9%	13247
PURPOSE:												
Pure Holiday	-15.5%	-14.1%	-8.5%	969	-6.3%	-7.1%	-1.5%	4369	-5.9%	-6.8%	-3.5%	6110
- 1-3 nights holiday	-16.1%	-13.5%	-3.6%	471	-6.2%	-2.7%	-0.4%	2696	-5.9%	-3.3%	-2.4%	3889
- 4+ nights holiday	-14.9%	-14.3%	-11.3%	497	-6.5%	-9.3%	-2.7%	1670	-5.9%	-8.9%	-4.9%	2215
VFR (on holiday)	-14.1%	-18.4%	15.7%	337	4.3%	0.2%	7.0%	2009	2.1%	-1.7%	-0.8%	3221
HOLIDAY (TOTAL)	-15.1%	-15.1%	-5.3%	1306	-3.3%	-5.2%	-0.1%	6376	-3.3%	-5.2%	-3.0%	9330
VFR (non-holiday)	-13.3%	-11.8%	3.0%	162	-17.4%	-18.4%	-15.9%	1180	-13.6%	-11.4%	-18.8%	2016
VFR (TOTAL)	-13.9%	-16.6%	11.3%	497	-5.2%	-6.8%	-2.3%	3189	-4.7%	-5.3%	-8.1%	5237
Business	-13.0%	19.1%	-6.3%	111	-10.0%	-7.0%	-9.6%	986	-8.9%	-9.1%	-6.6%	1541
Regions:												
West Midlands	-34.4%	-28.3%	-17.1%	87	-22.7%	-25.0%	-17.3%	616	-15.3%	-18.9%	-12.1%	1013
East of England	-8.4%	-0.3%	-14.2%	170	2.4%	12.4%	24.6%	867	-5.3%	3.5%	10.4%	1265
East Midlands	-13.4%	-14.1%	9.8%	129	-9.2%	-3.0%	0.3%	685	-10.3%	-6.0%	-8.3%	1028
London	-11.6%	-3.6%	6.6%	148	-8.0%	-12.8%	0.3%	980	-7.2%	-10.0%	-4.5%	1491
North West	-2.1%	16.9%	8.7%	227	-2.6%	4.3%	4.0%	1232	-0.5%	2.9%	1.2%	1885
North East	-4.6%	-1.3%	-12.9%	57	-13.8%	-13.1%	-27.3%	327	-16.0%	-19.5%	-29.6%	478
South East	-23.1%	-19.7%	-11.6%	284	-12.6%	-14.9%	-11.3%	1492	-11.0%	-13.0%	-15.5%	2284
South West	-18.1%	-20.9%	-9.0%	361	-7.6%	-11.1%	-3.9%	1711	-2.9%	-6.3%	0.0%	2553
Yorkshire & the Humber	-9.5%	-13.8%	-4.3%	178	-0.2%	-1.7%	-8.8%	970	-5.0%	-6.0%	-11.0%	1401
LOCATION TYPE:												
Seaside	-4.2%	5.4%	-1.2%	514	-3.4%	-1.7%	-1.3%	1959	-4.4%	-3.0%	-6.3%	2723
Large city/ large town	-9.0%	-9.1%	-2.9%	548	-6.9%	-7.6%	-5.8%	3526	-4.4%	-4.6%	-5.9%	5503
Small town	-22.9%	-23.8%	-4.9%	304	-10.2%	-13.3%	-2.5%	1908	-11.7%	-13.3%	-7.8%	2970
Countryside/ village	-28.2%	-29.5%	-14.6%	313	-8.0%	-8.5%	-1.2%	1633	-7.2%	-9.3%	-1.6%	2379
AGE:												
16-24	-12.4%	-16.9%	-17.1%	157	-15.3%	-17.7%	-1.7%	936	-12.0%	-16.0%	-9.2%	1463
25-34	-20.0%	-20.3%	-7.4%	258	-9.0%	-6.7%	-6.5%	1554	-10.2%	-7.9%	-10.6%	2269
35-44	-16.3%	-8.7%	5.8%	403	-11.6%	-10.5%	-6.3%	1768	-7.3%	-6.0%	-5.7%	2628
45-54	-12.9%	-13.3%	-12.1%	302	-4.3%	-2.2%	-6.8%	1588	-5.6%	-4.6%	-4.4%	2378
55+	-13.2%	-11.2%	-6.1%	495	-2.6%	-5.5%	1.2%	2931	-2.9%	-5.6%	-3.7%	4506
SEG:												
AB	-13.1%	-2.4%	-4.1%	513	-3.5%	-1.8%	-2.4%	2987	-3.4%	-2.1%	-3.4%	4544
C1	-15.8%	-16.2%	1.4%	495	-8.6%	-8.3%	-2.4%	2755	-7.0%	-7.7%	-5.5%	4122
C2	-18.4%	-29.9%	-18.1%	280	-11.1%	-13.7%	-3.0%	1501	-10.8%	-13.9%	-8.0%	2268
DE	-13.6%	-7.6%	-11.3%	329	-12.9%	-13.5%	-14.0%	1531	-11.1%	-10.6%	-14.1%	2301
CHILDREN IN HH:												
Any	-11.3%	-12.6%	5.5%	770	-5.0%	-3.0%	-1.3%	3227	-4.8%	-2.3%	-3.7%	4771
None	-17.5%	-13.2%	-12.6%	846	-8.8%	-9.8%	-4.6%	5479	-7.6%	-9.3%	-6.7%	8473
ACCOMMODATION:												
Commercial accom	-11.1%	-6.4%	-4.1%	1057	-5.9%	-5.1%	-1.6%	5500	-6.0%	-6.1%	-3.9%	7840
- Serviced accom	-7.3%	1.5%	0.0%	579	-5.4%	-2.1%	-3.1%	3732	-6.1%	-5.4%	-4.1%	5508
- Hotel/motel/guesthouse	-8.1%	2.1%	-0.8%	501	-5.6%	-3.8%	-4.0%	3330	-6.2%	-6.4%	-3.7%	4932
- Bed & Breakfast	-2.5%	6.6%	19.6%	67	-8.5%	2.7%	15.1%	356	-8.1%	-5.3%	-1.3%	517
Total self-catering rented	-18.0%	-15.1%	-9.5%	463	-7.9%	-8.4%	1.4%	1676	-6.7%	-7.6%	-2.7%	2154
- Camping & Caravanning (inc. owned caravans)	-12.5%	-4.2%	-12.9%	373	-10.3%	-12.1%	-4.9%	1232	-21.6%	-13.		