

GB Tourism Survey – Quarter 4 and Annual Data 2014

Summary of Results, 12th May 2015

Note: Quarter 4 Data

In the October – December 2014 period, a data collection issue resulted in the number of GBTS interviews conducted each month being lower than the expected sample for this survey. The interviews were also less closely matched to the profile of the population, requiring the application of a more complex weighting procedure.

As a result, the data for the months of October, November and December is insufficiently robust to issue separate monthly results, and so has been combined to create a quarterly report. Some caution is still required in interpreting these results, as the reduced sample size means that the margin of error is wider than in a standard 3 month period.

Further detail about this issue is provided in the appendix. Work is underway to calculate margins of error for quarterly and annual results, and this information will be published as soon as it becomes available.

Headline Results

Quarter 4 2014

GB

Between October and December 2014, the number of domestic overnight trips taken in Britain fell by 6%. The number of bednights fell by a lesser extent, by 2%, while a higher average spend per night resulted in a slight increase (+2%) in expenditure.

England

Results were more negative for England than for Britain as a whole, with an 11% fall in the number of overnight trips and a 5% decline in the number of bednights. Again though, a higher spend per night over the quarter resulted in a marginal increase (+1%) in expenditure.

January – December 2014

GB

In 2014, a total of 114.2 million domestic overnight trips were taken in Britain, a 7% decline on 2013. The number of bednights stood at 349.5 million, 6% lower than in 2013. Domestic overnight visitors spent £22.7 billion, 3% less in nominal terms than in 2013.

On average, visitors spent £199 per trip (£190 in 2013) with an average spend per night of £65 (£62 in 2013) over 3.06 nights (3.04 nights in 2013).

England

92.6 million domestic overnight trips were taken in England in 2014, 9% fewer than in 2013. The number of bednights also dropped (272.9 million, down 8%), while expenditure declined by 3% in nominal terms to £18.1 billion.

On average, domestic visitors to England spent £195 per trip, up from £184 the previous year, resulting from slight increases in both spend per night (£66 compared to £63 in 2013) and average trip length (2.95 nights, up from 2.92 nights.)

2014 Detailed Analysis – Domestic Tourism in England

Trip Purpose

The number of domestic holiday trips taken in England in 2014 fell by 9%, while expenditure dropped by 4%. The decline in longer (4+ night) holiday volumes was less steep (-7%) than in short breaks (-11%), a contrast to recent years, where short breaks have outperformed other trip types.

A decline of 6% in trips to visit friends and relatives (VFR) masked differing trends within this segment of the market. The number of VFR trips taken mainly for holiday purposes grew by 1.5% year on year, with a 7% rise in expenditure, but other, so-called “duty” VFR trips declined for the third successive year, with a 16% drop in the number of trips taken.

Business travel declined in line with the overall market, with a 10% fall in the number of domestic overnight business trips, and a 4% reduction in expenditure.

	<i>England Trips (m)</i>			<i>England Expenditure (£m)</i>		
	2013	2014	YOY Change	2013	2014	YOY Change
TOTAL TRIPS	101.742	92.613	-9.0%	18,708	18,085	-3.3%
All Pure Holiday	44.918	40.74	-9.3%	10,461	10,046	-4.0%
- 1-3 nights	29.583	26.472	-10.5%	5,643	5,264	-6.7%
- 4+ nights	15.334	14.268	-7.0%	4,818	4,782	-0.7%
VFR (on holiday)	21.936	22.263	1.5%	2,462	2,644	7.4%
Pure + VFR Holiday (TOTAL)	66.853	63.003	-5.80%	12,923	12,690	-1.8%
VFR (non-holiday)	16.253	13.645	-16.0%	1,616	1,419	-12.2%
All VFR (TOTAL)	38.189	35.908	-6.0%	4,078	4,064	-0.3%
All Business	15.122	13.547	-10.4%	3,655	3,499	-4.3%

Region Visited

Within England, there were declines in trip volumes to all regions other than the East of England, where visitor numbers increased marginally year on year.

Tourism expenditure fell most steeply in the West Midlands and North East, but was maintained or grew in the East of England, London, North West and East Midlands.

	<i>England Trips (m)</i>			<i>England Expenditure (£m)</i>		
	2013	2014	YOY Change	2013	2014	YOY Change
TOTAL TRIPS	101.742	92,613	-9.0%	18,708	18,085	-3.3%
West Midlands	9.000	7.251	-19.4%	1,322	1,153	-12.8%
East of England	8.871	8.975	1.2%	1,408	1,604	13.9%
East Midlands	7.971	7.141	-10.4%	1,109	1,107	-0.2%
London	12.305	11.376	-7.5%	2,793	2,889	3.4%
North West	13.883	12.735	-8.3%	2,438	2,465	1.1%
North East	3.872	3.694	-4.6%	748	616	-17.6%
South East	18.004	16.186	-10.1%	2,651	2,448	-7.7%
South West	19.362	17.309	-10.6%	4,284	3,933	-8.2%
Yorkshire / Humberside	10.145	9.445	-6.9%	1,814	1,728	-4.7%

Destination Type

The steepest declines in trip taking last year were in urban destinations – small and larger towns and cities - while seaside and countryside destination volumes fell back to a lesser extent.

	<i>England Trips (m)</i>			<i>England Expenditure (£m)</i>		
	2013	2014	YOY Change	2013	2014	YOY Change
TOTAL TRIPS	101.742	92.613	-9.0%	18,708	18,085	-3.3%
Seaside	18.598	17.637	-5.2%	3,886	3,860	-0.7%
Large city/ large town	44.034	40.033	-9.1%	8,104	7,778	-4.0%
Small town	23.354	20.830	-10.8%	3,464	3,277	-5.4%
Countryside/ village	18.286	17.084	-6.6%	3,186	3,111	-2.4%

Destination Type - Holidays

Similarly to all trips, seaside holidays fell to a lesser extent than to other destination types. The decline in large city / town holidays stands in contrast to recent years, where city breaks outperformed other trip types.

	<i>England Holiday Trips (m)</i>			<i>England Holiday Expenditure (£m)</i>		
	2013	2014	YOY Change	2013	2014	YOY Change
HOLIDAY TRIPS	44.93	40.74	-9.3%	10,463	10,046	-4.0%
Seaside	13.45	12.89	-4.2%	3,109	3,112	0.1%
Large city/ large town	13.98	12.49	-10.7%	3,335	3,034	-9.0%
Small town	8.42	7.68	-8.8%	1,634	1,694	3.7%
Countryside/ village	10.34	9.21	-10.9%	2,351	2,195	-6.6%

Trip Takers – All Trips

As in previous years, performance trends in 2014 have varied by demographic characteristics. The largest percentage decline in trip taking was observed among the youngest age group, while volumes were only slightly below 2013 levels for the 55+ age group, whose trip expenditure actually rose by 3% over the year.

There were also differing trends by social grade, with the lowest level of decline (-4%) among the most affluent AB social grade, but a 16% drop in trip volumes among the least affluent DEs.

There are also variations in region of origin, with double digit falls in trip activity among residents of the South West and Midlands, but a more stable picture among residents of the North West, Yorkshire, East of England and Wales.

	England Trips (m)			England Expenditure (£m)		
	2013	2014	YOY Change	2013	2014	YOY Change
TOTAL TRIPS	101.742	92.613	-9.0%	18,708	18,085	-3.3%
Age						
16-24	12.442	10.395	-16.5%	1,759	1,705	-3.1%
25-34	17.189	15.117	-12.1%	2,856	2,657	-7.0%
35-44	21.802	18.846	-13.6%	3,858	3,556	-7.8%
45-54	20.245	19.003	-6.1%	4,425	4,172	-5.7%
55+	30.065	29.252	-2.7%	5,810	5,995	3.2%
Social Grade						
AB	40.313	38.54	-4.4%	8,206	8,081	-1.5%
C1	32.255	28.883	-10.5%	5,756	5,560	-3.4%
C2	16.654	14.67	-11.9%	2,825	2,794	-1.1%
DE	12.52	10.52	-16.0%	1,921	1,649	-14.2%
Region of Origin						
North East	5.49	4.79	-12.8%	946	991	4.8%
Yorks & Humberside	10.68	10.38	-2.8%	2,132	2,105	-1.3%
East Midlands	10.43	8.52	-18.3%	1,871	1,569	-16.1%
East of England	8.41	8.21	-2.4%	1,460	1,513	3.6%
London	8.90	7.74	-13.0%	1,569	1,394	-11.2%
South East	16.56	16.24	-1.9%	2,740	2,888	5.4%
South West	12.73	10.54	-17.2%	2,296	1,757	-23.5%
West Midlands	8.89	7.18	-19.2%	1,596	1,462	-8.4%
North West	11.54	11.41	-1.1%	2,080	2,378	14.3%
England	93.63	85.02	-9.2%	16,690	16,057	-3.8%
Scotland	4.11	3.48	-15.3%	1,195	1,094	-8.5%
Wales	4.02	4.11	2.2%	825	933	13.1%

Trip Takers – Holiday Trips

An analysis of demographic data for “pure” holiday trips shows a slightly different pattern. While the trend of a stronger performance among older and more affluent consumers is consistent, the greatest percentage and volume declines in domestic holiday travel in 2014 were among middle age groups, and C1 social grade – typically white collar workers.

Similar to the total trip profile, some of the steepest declines come from residents of the South West and East Midlands. Residents of the South East and Wales were closest to 2013 volumes in their holiday behaviour.

	England Holiday Trips (m)			England Holiday Expenditure (£m)		
	2013	2014	YOY Change	2013	2014	YOY Change
HOLIDAY TRIPS	44.93	40.74	-9.30%	10,463	10,046	-4.00%
Age						
16-24	3.81	3.43	-10.0%	823	812	-1.3%
25-34	6.82	6.06	-11.1%	1,486	1,371	-7.7%
35-44	10.34	8.73	-15.6%	2,013	1,886	-6.3%
45-54	9.26	8.43	-9.0%	2,504	2,232	-10.9%
55-64	7.46	7.11	-4.7%	1,881	1,858	-1.2%
65+	7.24	6.98	-3.6%	1,756	1,887	7.5%
Social Grade						
AB	16.62	16.03	-3.5%	4,321	4,284	-0.9%
C1	13.94	11.46	-17.8%	3,137	2,774	-11.6%
C2	8.42	7.88	-6.4%	1,750	1,831	4.6%
DE	5.95	5.38	-9.6%	1,254	1,157	-7.7%
Region of Origin						
North East	2.80	2.35	-16.1%	579	567	-2.1%
Yorks & Humberside	5.68	5.30	-6.7%	1,256	1,240	-1.3%
East Midlands	4.37	3.61	-17.4%	970	845	-12.9%
East of England	3.94	3.69	-6.3%	899	868	-3.4%
London	3.31	2.90	-12.4%	868	736	-15.2%
South East	6.50	6.26	-3.7%	1,439	1,629	13.2%
South West	5.22	4.28	-18.0%	1,229	933	-24.1%
West Midlands	4.17	3.94	-5.5%	1,006	942	-6.4%
North West	5.39	5.16	-4.3%	1,183	1,259	6.4%
England	41.36	37.48	-9.4%	9,430	9,020	-4.3%
Scotland	1.77	1.38	-22.0%	550	492	-10.5%
Wales	1.80	1.88	4.4%	482	534	10.8%

Longer Term Trends

The tables below show domestic trip volumes, bednight volumes and expenditure for all trips and holiday trips to England in the period 2006 – 2014.

All Trip Purposes

	2006	2007	2008	2009	2010	2011	2012	2013	2014
Trips (m)	100.872	99.127	94.782	102.249	95.503	104.28	104.458	101.756	92.613
Bednights (m)	304.934	304.061	292.814	310.077	284.992	306.806	310.193	297.199	272.859
Expenditure (£m*)	15901	16135	16079	17016	15842	17914	19497	18710	18085

Holiday Trips

	2006	2007	2008	2009	2010	2011	2012	2013	2014
Trips (m)	40.397	41.263	39.753	47.01	43.544	46.157	45.992	44.926	40.740
Bednights (m)	145.075	151.109	141.816	168.503	151.732	157.961	156.235	149.722	137.334
Expenditure (£m*)	8104	8579	8478	9615	9072	10031	11007	10463	10046

*All expenditure figures are shown in nominal (historical) terms – i.e. without adjustment to take into account the effect of inflation

Outbound Tourism*

The table below presents outbound (overseas) trip volumes taken by UK residents over the period 2006 – 2014. These figures are taken from the International Passenger Survey.

Revised 21/05/15 after ONS published a revision. Please see the ONS website for more details:

<http://www.ons.gov.uk/ons/rel/ott/travel-trends/2014/rpt-travel-trends--2014.html#tab-About-the-estimates>

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2014 YOY change
All trips	69.536	69.450	69.011	58.614	55.562	56.836	56.609	57.793	60.082	+4%
Holiday trips	45.287	45.437	45.531	38.492	36.422	36.819	36.173	37.148	38.520	+4%

Summary – GB and England Results

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
Oct-Dec '14									
GB	29.4	27.6	-6%	80.7	79.0	-2%	4,965	5046	+2%
England	25.0	22.3	-11%	67.0	63.7	-5%	4,052	4,106	+1%
Jan-Dec '14									
GB	122.9	114.2	-7%	373.6	349.5	-6%	23,294	22,692	-3%
England	101.8	92.6	-9%	297.2	272.9	-8%	18,710	18,085	-3%

Purpose of Trip – October to December 2014

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
GB									
Holiday	10.9	9.3	-15%	30.0	29.2	-3%	2,595	2,302	-11%
Business	4.3	3.9	-10%	8.7	9.2	+6%	991	1,141	+15%
VFR	13.5	13.8	+2%	40.6	38.9	-4%	1,320	1,508	+14%
England									
Holiday	8.8	7.2	-18%	23.6	22.6	-4%	2,057	1,842	-11%
Business	3.7	3.3	-10%	7.0	7.7	+11%	805	982	+22%
VFR	12.0	11.2	-6%	35.1	32.0	-9%	1,138	1,207	+6%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	57.0	52.9	-7%	198.2	184.8	-7%	13,472	13,065	-3%
Business	17.8	15.9	-11%	40.1	37.5	-7%	4,388	4,101	-7%
VFR	44.2	42.5	-4%	124.8	118.3	-5%	4,847	4,990	+3%
England									
Holiday	44.9	40.7	-9%	149.7	137.3	-8%	10,463	10,046	-4%
Business	15.1	13.5	-10%	32.3	31.0	-4%	3,655	3,499	-4%
VFR	38.2	35.9	-6%	105.9	97.4	-8%	4,078	4,064	0%

Outbound Travel – UK Residents*

Revised 21/05/15 after ONS published a revision. Please see the ONS website for more details:

<http://www.ons.gov.uk/ons/rel/ott/travel-trends/2014/rpt-travel-trends--2014.html#tab-About-the-estimates>

	TRIPS (MILLIONS)			SPEND (£BN)		
	2013	2014	% +/-	2013	2014	% +/-
Oct-Dec 2014	11.6	12.2	+6%	6.7	6.9	+4%
Jan '14 – Dec'14	57.8	60.1	+4%	34.5	35.5	+3%

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:

- Year to date (Jan-Sept 2013 vs. Jan-Sept 2014)
- Quarter 4 (Oct-Dec 2013 vs. Oct-Dec 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.

GBTS: Comparisons with equivalent periods, 2013

LEGEND: Above Average Performance (Green), Average Performance (Yellow), Below Average Performance (Red)

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				England											
	Month: Oct-Dec 2014			Unweighted Trips	YTD: Jan - Dec 2014			Unweighted Trips	Month: Oct-Dec 2014			Unweighted Trips	YTD: Jan - Dec 2014			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-6.1%	-2.0%	1.6%	2305	-7.0%	-6.4%	-2.6%	14420	-10.9%	-4.9%	1.3%	1936	-9.0%	-8.2%	-3.3%	11755
PURPOSE:																
Pure Holiday	-14.5%	-2.6%	-11.3%	738	-7.1%	-6.8%	-3.0%	7068	-17.7%	-4.4%	-10.4%	570	-9.3%	-8.2%	-4.0%	5443
- 1-3 nights holiday	-21.0%	-21.3%	-24.5%	499	-7.9%	-6.4%	-6.0%	4360	-24.2%	-22.5%	-25.4%	387	-10.5%	-7.6%	-6.7%	3408
- 4+ nights holiday	6.2%	17.3%	19.1%	239	-5.7%	-7.0%	0.2%	2708	3.2%	15.3%	26.0%	182	-7.0%	-8.6%	-0.7%	2030
VFR (on holiday)	1.9%	-1.9%	13.6%	842	2.6%	0.2%	7.9%	3436	-5.2%	-4.1%	6.8%	691	1.5%	-1.2%	7.4%	2908
HOLIDAY (TOTAL)	-7.3%	-2.3%	-5.0%	1580	-4.1%	-4.8%	-1.0%	10504	-11.9%	-4.3%	-5.9%	1258	-5.8%	-6.1%	-1.8%	8355
VFR (non-holiday)	1.8%	-9.0%	15.3%	438	-12.5%	-14.8%	-5.0%	1991	-8.4%	-18.4%	4.5%	352	-16.0%	-19.7%	-12.2%	1674
VFR (TOTAL)	1.8%	-4.2%	14.2%	1280	-3.8%	-5.2%	3.0%	5427	-6.4%	-9.0%	5.9%	1043	-6.0%	-8.1%	-0.3%	4582
Business	-9.6%	6.0%	15.1%	232	-10.6%	-6.6%	-6.5%	1558	-9.7%	10.6%	22.0%	200	-10.4%	-4.0%	-4.3%	1328
Regions:																
West Midlands	-10.2%	4.3%	3.3%	181	-19.4%	-16.1%	-12.8%	881	-10.2%	4.3%	3.3%	181	-19.4%	-16.1%	-12.8%	881
East of England	-4.5%	1.3%	-6.2%	192	1.2%	9.8%	13.9%	1165	-4.5%	1.3%	-6.2%	192	1.2%	9.8%	13.9%	1165
East Midlands	-6.6%	0.0%	9.1%	166	-10.4%	-5.2%	-0.2%	920	-6.6%	0.0%	9.1%	166	-10.4%	-5.2%	-0.2%	920
London	-14.4%	-18.4%	-2.0%	235	-7.5%	-11.2%	3.4%	1359	-14.4%	-18.4%	-2.0%	235	-7.5%	-11.2%	3.4%	1359
North West	-16.0%	8.0%	1.0%	267	-8.3%	1.5%	1.1%	1644	-16.0%	8.0%	1.0%	267	-8.3%	1.5%	1.1%	1644
North East	22.9%	40.3%	11.9%	82	-4.6%	-1.8%	-17.6%	449	22.9%	40.3%	11.9%	82	-4.6%	-1.8%	-17.6%	449
South East	-3.9%	-2.7%	10.8%	362	-10.1%	-12.5%	-7.7%	2040	-3.9%	-2.7%	10.8%	362	-10.1%	-12.5%	-7.7%	2040
South West	-14.4%	-18.4%	-8.9%	332	-10.6%	-15.5%	-8.2%	2240	-14.4%	-18.4%	-8.9%	332	-10.6%	-15.5%	-8.2%	2240
Yorkshire & the Humber	-22.0%	-13.9%	6.2%	170	-6.9%	-6.2%	-4.7%	1245	-22.0%	-13.9%	6.2%	170	-6.9%	-6.2%	-4.7%	1245
LOCATION TYPE:																
Seaside	-0.4%	-6.3%	13.1%	336	-1.3%	-2.8%	2.7%	3209	-7.4%	-14.1%	14.8%	250	-5.2%	-6.7%	-0.7%	2444
Large city/ large town	-8.5%	-7.6%	-2.5%	1013	-7.2%	-7.6%	-3.8%	5590	-12.8%	-11.6%	-1.6%	846	-9.1%	-9.3%	-4.0%	4782
Small town	-6.6%	-0.7%	-0.4%	571	-9.5%	-10.9%	-7.2%	3259	-10.2%	3.0%	3.3%	463	-10.8%	-11.0%	-5.4%	2604
Countryside/ village	1.1%	11.7%	3.1%	448	-5.9%	-4.2%	-0.7%	2783	-3.8%	7.6%	-7.3%	361	-6.6%	-4.7%	-2.4%	2191
AGE:																
16-24	-17.4%	-17.9%	-16.4%	275	-12.7%	-16.4%	-1.6%	1584	-23.0%	-18.6%	-17.4%	228	-16.5%	-18.2%	-3.1%	1292
25-34	-12.6%	-11.7%	-13.9%	353	-10.2%	-7.4%	-6.9%	2446	-21.6%	-11.7%	-11.0%	256	-12.1%	-7.2%	-7.0%	1960
35-44	-10.1%	-14.9%	8.5%	413	-11.9%	-11.9%	-6.7%	2792	-13.2%	-19.2%	4.4%	341	-13.6%	-14.4%	-7.8%	2267
45-54	3.3%	23.5%	5.5%	417	-3.7%	-2.7%	-4.6%	2576	-3.4%	17.0%	3.2%	331	-6.1%	-2.3%	-5.7%	2079
55+	-1.3%	4.2%	8.3%	847	-1.7%	-1.4%	3.3%	5020	-3.3%	1.9%	10.2%	711	-2.7%	-4.3%	3.2%	4094
SEG:																
AB	5.7%	10.7%	13.4%	838	0.4%	2.7%	2.2%	4973	-2.5%	5.0%	9.5%	669	-4.4%	-1.8%	-1.5%	3988
C1	-11.5%	-11.3%	-5.3%	725	-10.8%	-10.8%	-5.1%	4438	-12.8%	-13.8%	-3.2%	609	-10.5%	-11.1%	-3.4%	3685
C2	-17.0%	0.1%	-4.3%	358	-12.1%	-9.7%	-3.6%	2480	-16.8%	7.6%	0.2%	292	-11.9%	-9.1%	-1.1%	2011
DE	-15.6%	-14.4%	-19.1%	383	-13.8%	-16.4%	-13.6%	2529	-25.8%	-21.6%	-19.5%	287	-16.0%	-16.9%	-14.2%	1998
CHILDREN IN H/H:																
Any	-3.8%	-10.3%	5.9%	767	-4.7%	-5.2%	-1.4%	5192	-7.4%	-14.6%	4.8%	625	-6.7%	-7.1%	-3.3%	4216
None	-7.2%	1.6%	0.2%	1538	-8.1%	-7.0%	-3.0%	9228	-12.5%	-0.7%	0.1%	1238	-10.0%	-8.7%	-3.4%	7475
ACCOMMODATION:																
Commercial accom	-7.5%	1.5%	2.9%	1147	-6.3%	-4.7%	-1.0%	8686	-9.7%	3.3%	6.0%	961	-7.6%	-5.3%	-0.9%	7016
- Serviced accom	-8.2%	2.8%	2.1%	891	-6.4%	-2.8%	-2.2%	5938	-9.5%	6.5%	6.8%	764	-6.9%	-1.2%	-1.2%	4941
- Hotel/motel/guesthouse	-6.8%	5.3%	2.3%	824	-6.4%	-3.9%	-3.2%	5313	-8.4%	9.5%	7.2%	702	-6.7%	-1.5%	-1.7%	4437
- Bed & Breakfast	-23.5%	-15.1%	-13.9%	58	-10.1%	-0.7%	9.2%	555	-21.8%	-16.7%	-13.5%	54	-11.1%	-2.7%	7.9%	453
Total self-catering rented	-9.7%	-4.1%	5.0%	222	-6.6%	-7.6%	1.3%	2566	-12.1%	-4.4%	-0.8%	173	-8.9%	-9.4%	-0.8%	1940
- Camping & Caravanning (inc. owned caravans)	-0.1%	12.0%	2.6%	131	-5.6%	-8.6%	-3.8%	1890	-4.9%	7.0%	-3.7%	90	-9.6%	-11.7%	-6.4%	1373
- Other self-catering rented	-15.4%	-10.8%	6.0%	130	-1.2%	-3.4%	5.5%	1135	-16.3%	-12.8%	-1.5%	103	-0.5%	-2.6%	4.7%	855
Hostels	60.7%	58.6%	-15.2%	20	-13.6%	-29.7%	3.4%	90	-28.2%	-19.7%	7.7%	8	-39.7%	-57.8%	-5.1%	46
Own home/friends'/relatives'	-4.8%	-6.8%	-3.8%	1145	-7.3%	-8.6%	-7.2%	50	-12.5%	-13.5%	-14.3%	965	-10.4%	-11.7%	-10.9%	4689

NB. Please note that for regional comparisons the 2014 figures are based now upon the revised boundaries drawn at a Local Authority level in 2009. The 2013 regional figures are based upon previous boundary definitions.

Appendix – Summary of GBTS Fieldwork Issue, October to December 2014

The Great Britain Tourism Survey (GBTS) is based on a nationally representative sample of the adult population using a face to face in-home interview across Great Britain. The fieldwork is undertaken on a weekly basis for 50 weeks of the year (no interviewing in the last two weeks of each year) and measures the number of overnight trips, and other related data, made by GB residents spending at least one night away from home.

The GBTS survey utilises the TNS Face-to-Face CAPI Omnibus as the survey vehicle. The Omnibus provides a base sample of 2000 nationally representative interviews per week, and includes questions for other surveys as well although the GBTS questions are always placed first in the survey. Interviews on the Omnibus are interviewer administered with the aid of a laptop computer, known as Computer Assisted Personal Interviewing (CAPI). The CAPI computer provides the appropriate questions for the interviewer to read to the respondent (the script), and is used by the interviewer to record the answers given.

To qualify for the GBTS, respondents must have returned from a trip, where they spent at least one night away from home, within the previous four week period. The start and end dates of the previous four week period are read out by the interviewer from the script on the CAPI computer. The dates of this four week period are updated in the script each week, and the new script issued to the interviewers. The computer will not accept a trip with a return date outside this four week range, so if a respondent does not offer an overnight trip with a valid return date they will not qualify for the GBTS survey and the interviewer will move on to another section within the Omnibus. Note: The exact wording of the recruitment question is provided at the end of this document.

During October, November and December 2014 a number of Omnibus interviews were delayed and not completed until well beyond the intended interview week. Because the dates of the four week return period included in the questionnaire wording did not change when the interviews were delayed, some recent trips could not be recorded, as they fell after the dates listed in the questionnaire. There may also have been respondent confusion, as the dates listed did not match the questionnaire wording about “the last 4 weeks.” When the data for these delayed interviews were analysed, it was found that, in comparison to interviews completed in the correct fieldwork week, a lower number of respondents qualified for the GBTS module, leading to an overly low estimate of trip volume and value.

After careful analysis of the data, the solution to rectify this issue was to remove any respondents interviewed more than four days after the intended fieldwork week from the Omnibus data. This created a sample with a more representative proportion of trip-takers as the basis for the GBTS data in the period with the fieldwork issue.

Whilst this creates a sample containing respondents who have had their overnight trips correctly recorded, it is now smaller than usual, is not consistent from week to week and is no longer representative of the GB population. In order to compensate for this, and to create data at the population level, each respondent in the sample has had their responses weighted. Inevitably this weighting and the smaller sample sizes have resulted in data with a greater margin of error than is the case for previous months of the GBTS.

As a result, the decision was taken to publish the affected months (October, November and December 2014) as a single combined set of results, covering Quarter 4 2014. The combined data should be treated with caution, as the variability within the sample, and resultant weighting, means these are likely to be less representative of trip-taking in the GB population than data from other periods within the GBTS.

Appendix - Wording of GBTS recruitment questions

We would like to ask you about overnight trips you have taken in the UK and Ireland recently. We are interested in ALL overnight trips taken for whatever reason, including holidays, visits to friends and relatives, business trips and so on.

Q.1 Have you returned from any trips in the past four weeks that involved staying away from home for one night or more at a destination within the UK or the Republic of Ireland?

In this survey, by the UK, we mean anywhere in England, Scotland, Wales, Northern Ireland, the Channel Islands, the Isle of Man or any of the other islands which are part of the United Kingdom.*

The four weeks we are talking about are from Monday *Date* through to last Sunday *Date*.

Please include any trips taken where the main destination was abroad but where you stayed away from home in the UK or Ireland as part of that trip.

NOTE FOR INTERVIEWER: Examples would include staying overnight at an airport hotel prior to a flight abroad.

01: Yes

02: No

(DK)

*NB. Although the question is asked about the UK, data is only published for GB (England, Wales and Scotland)