

## GB TOURISM SURVEY - February 2014 SUMMARY OF RESULTS

### 1. Headlines

- In February 2014, there were 6.9 million domestic overnight trips in Great Britain, -7% fewer than in February 2013 where there were 7.4 million trips.
- Nights and expenditure were also down compared to 2013, by -13% and -15% respectively.
- In England, trips, nights and spend were also down year-on-year. Trips fell by -9% to 5.7 million, nights by -13% to 13.5 million and expenditure -16% to £968 million.
- For the year to February, trips were down in Great Britain by -5% to 12.5 million. Nights were down -6% to 25 million and expenditure -9% to £2.1bn.

### 2. Context

- After an exceptionally wet January, February continued to be exceptionally wet and stormy, resulting in extensive flooding in England, particularly on the Somerset Levels and from the River Thames, with storm waves damaging the coast.
- January and February are relatively 'small volume months' for domestic tourism, therefore the sample sizes of trip taking are smaller in these months than during the months of April-October, and results should be treated with caution.

### 3. Trip Characteristics

- Though all trips are down for the year to date in Great Britain, positively holiday trips are up, by 6% to 4.6 million and with expenditure up by 15% to £963 million. Visits to friends and relatives (VFR) trips remain flat (up 1%), but holiday VFR trips and spend are up, by 27% and 30% respectively.
- Trips to the seaside increased for the year to date, by 15%, whilst trips to other destination types decreased.
- Business trips, which were up compared to 2012 at this time last year (6%), have fallen back, down -24% with expenditure down -34%.

### 4. Overseas Travel by UK Residents

- The number of trips taken abroad by UK residents in February increased by 3% compared to February 2013, although spend was down by -4%.

### 5. Other Tourism Surveys

- Room occupancy in England in February remained flat compared to February 2013 (+1%).
- The volume of day visits in Great Britain in the three months to February 2014 declined by 8% when compared with the same period last year, falling from 375 million to 346 million. The value of those visits also decreased during the same period, down from £12.0 billion to £11.3 billion (a decrease of 6%).
- 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	% +/-
<b>February '14</b>									
GB	7.4	6.9	-7%	19.1	16.7	-13%	1,390	1,179	-15%
England	6.3	5.7	-9%	15.5	13.5	-13%	1,157	968	-16%
<b>Jan-Feb '14</b>									
GB	13.1	12.5	-5%	31.7	29.7	-6%	2,330	2,123	-9%
England	11.1	10.5	-5%	26.0	25.0	-4%	1,923	1,802	-6%

### Purpose of Trip – February 2014

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
<b>GB</b>									
Holiday	2.5	2.8	+12%	5.8	6.5	+11%	489	556	+14%
Business	1.6	1.1	-30%	4.2	2.6	-38%	519	311	-40%
VFR	3.0	2.8	-7%	8.2	7.1	-13%	329	273	-17%
<b>England</b>									
Holiday	2.0	2.2	+9%	4.3	5.2	+20%	377	442	+17%
Business	1.4	0.9	-37%	3.5	2.0	-42%	443	263	-41%
VFR	2.6	2.5	-5%	6.8	5.9	-14%	286	228	-20%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
<b>GB</b>									
Holiday	4.3	4.6	+6%	9.7	10.6	+9%	837	963	+15%
Business	3.0	2.2	-24%	7.1	4.7	-33%	827	550	-34%
VFR	5.3	5.3	+1%	13.5	12.8	-5%	569	534	-6%
<b>England</b>									
Holiday	3.5	3.7	+7%	7.4	8.7	+18%	646	800	+24%
Business	2.5	1.8	-27%	5.8	3.9	-33%	705	467	-34%
VFR	4.6	4.7	+3%	11.5	10.9	-5%	484	461	-5%

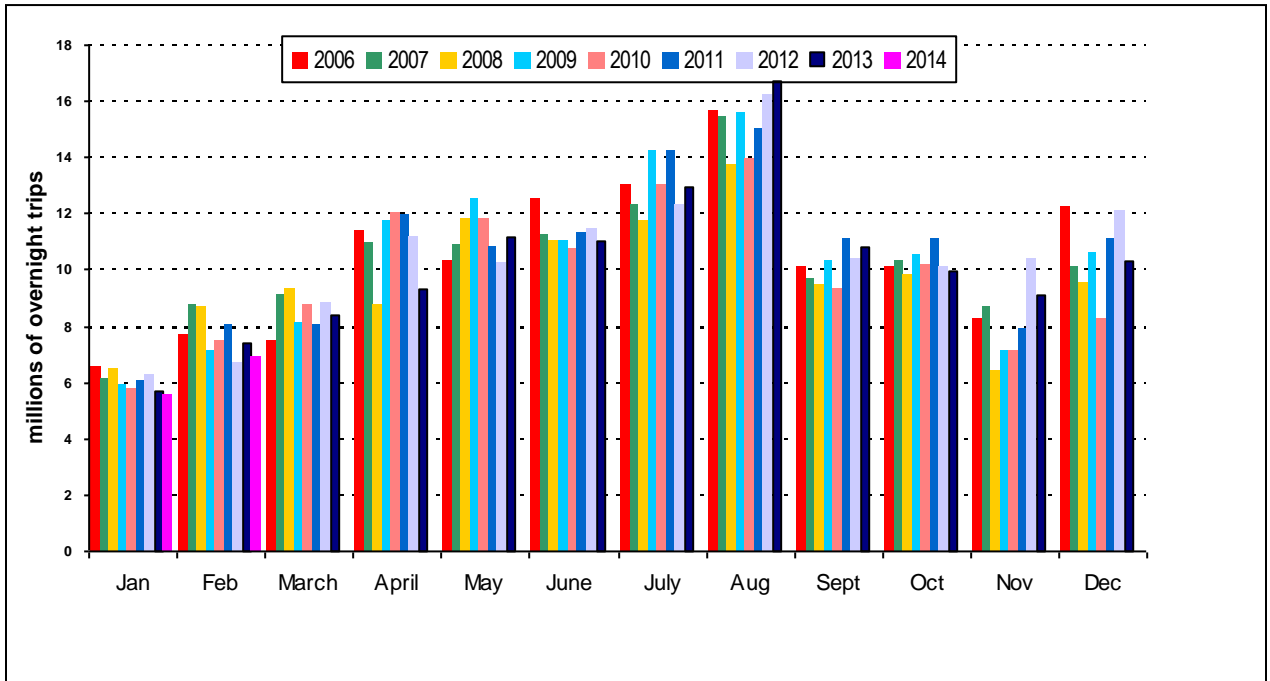
### Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2013	2014	% +/-	2013	2014	% +/-
February 2014	3.2	3.3	+3%	1.8	1.8	-4%
Jan '14 – Feb '14	6.7	6.9	+4%	3.9	3.7	-6%
March '13 – Feb '14	56.6	58.7	+4%	32.6	34.7	+7%

# TREND CHARTS



## GB All Trips – Domestic Trip Volume by Month



## GB All Trips - Annual Percentage Change

