

GB TOURISM SURVEY – July 2014

SUMMARY OF RESULTS

1. Headlines

- In July 2014, there were 12.3 million domestic overnight trips in Great Britain, -5% down on July 2013, when there were 13.0 million trips.
- Nights fell by -3%, to 46.9 million, with expenditure up +2% compared to July last year, rising to £2.8 billion.
- Looking at England alone, trips were also down against July last year, at 10.0 million (-4%), with nights down -5% to 35.5 million. Expenditure was also up for England, by +3% against July last year, rising to £2.2 billion.
- For the year to date, trips were down in Great Britain by -5% at 62.9 million. Nights and spend were also down by -4% and -3% respectively.

2. Context

- Temperatures in July were above average across the UK, with warm days and maximum temperatures above 25°C. However, temperatures were not as high as July 2013.
- The FIFA World Cup started in June and ran through to mid-July, which might have had an impact on trip taking and other leisure behaviour in July 2014.

3. Trip Characteristics – January-July 2014

- Over the first half of the year holiday trips declined by -2% to 30.2m, with nights down -3% to 102.1m and spend up (+2%) at £7.2 billion.
- Trips, nights and spend on visits to friends and relatives (VFR) were down (by -10%, -11% and -12% respectively). However, VFR trips for leisure purposes are actually up, +7% vs -18% for non-leisure VFR.
- Business trips (-10%), nights (-11%) and spend (-12%) have all declined for the year so far.
- Trips to the seaside are up for the year so far, +2%, with all other destination types showing declines (-5% for large cities/towns, -8% for small towns, and -4% for countryside/village locations).
- There have been declines in trip taking across all of the regions of England so far this year, except for the East of England (+5%) and Yorkshire and the Humber (+2%). Additionally, there has been a decline in trip taking by social class C2DE's (-11%), and those with no children in the household (-6%).

4. Overseas Travel by UK Residents

- The number of trips taken abroad by UK residents in July decreased by -3% compared to July 2013, with expenditure down -23%. In the year to date volume rose by +3% while spend fell by -18%.

5. Other Tourism Surveys

- Room occupancy in July showed a very slight increase, of +1%, rising to 79%, whilst bedspace occupancy remained flat, at 60%.
- The volume of day visits in Great Britain in the three months to July 2014 decreased by -4% when compared with the same period last year, falling from 442 million to 424 million. The value of those visits also fell during the same period, at £13.6 billion (down -10% from £15.1 billion).

KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
July '14									
GB	13.0	12.3	-5%	48.6	46.9	-3%	2,765	2,810	+2%
England	10.4	10.0	-4%	37.4	35.5	-5%	2,175	2,230	+3%
Jan-July '14									
GB	66.1	62.9	-5%	195.7	187.3	-4%	12,634	12,314	-3%
England	54.5	51.3	-6%	155.0	145.8	-6%	10,186	9,875	-3%

Purpose of Trip – July 2014

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
GB									
Holiday	7.2	7.0	-2%	31.8	31.0	-3%	1,779	1,888	+6%
Business	1.7	1.6	-5%	4.0	3.8	-6%	400	438	+10%
VFR	3.8	3.4	-12%	11.6	10.8	-7%	534	440	-18%
England									
Holiday	5.6	5.4	-2%	23.7	23.0	-3%	1,385	1,431	+3%
Business	1.4	1.4	+2%	3.3	3.0	-9%	327	397	+21%
VFR	3.1	2.9	-7%	9.3	9.0	-3%	417	364	-13%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	30.8	30.2	-2%	105.4	102.1	-3%	7,043	7,172	+2%
Business	10.3	9.3	-10%	23.7	21.0	-11%	2,596	2,286	-12%
VFR	22.5	21.6	-4%	60.0	58.5	-3%	2,613	2,512	-4%
England									
Holiday	24.3	23.4	-3%	79.4	76.0	-4%	5,489	5,535	+1%
Business	8.9	8.0	-10%	19.3	17.3	-11%	2,173	1,955	-10%
VFR	19.2	18.6	-3%	50.3	48.1	-4%	2,184	2,076	-5%

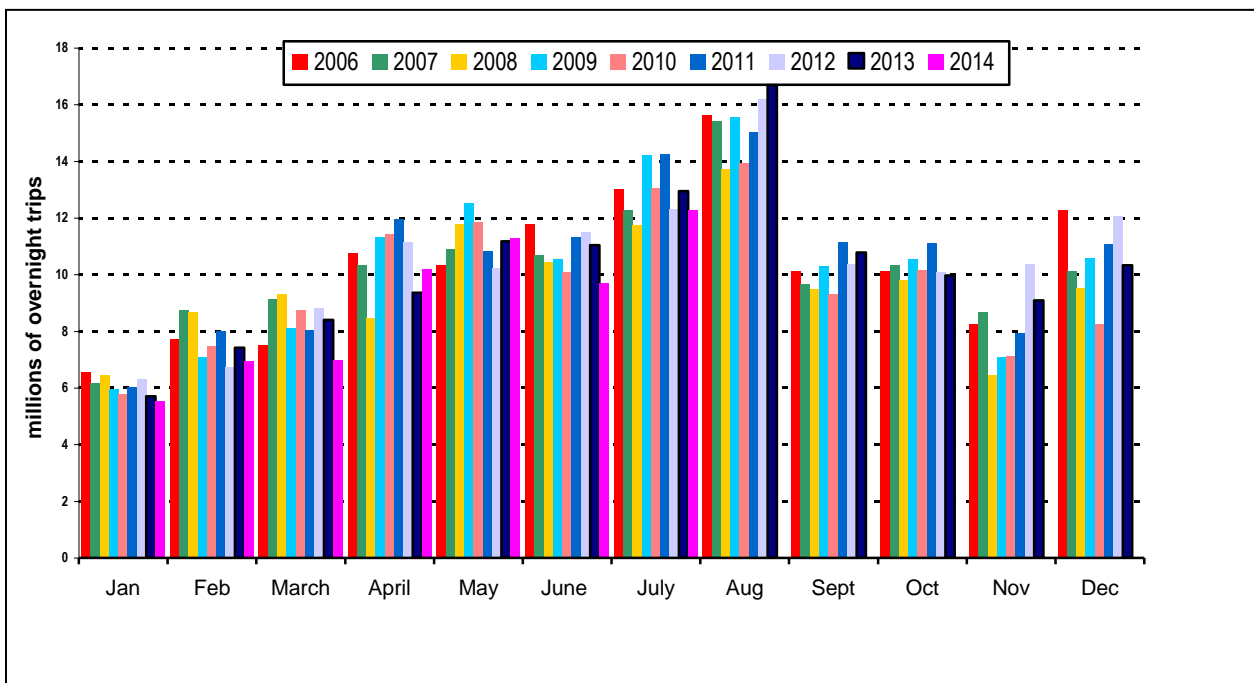
Outbound Travel – UK Residents

	TRIPS (MILLIONS)		
	2013	2014	% +/-
July 2014	6.0	5.8	-3%
Jan '14 – July '14	32.1	33.0	+3%
Aug '13 – July '14	57.2	59.3	+4%

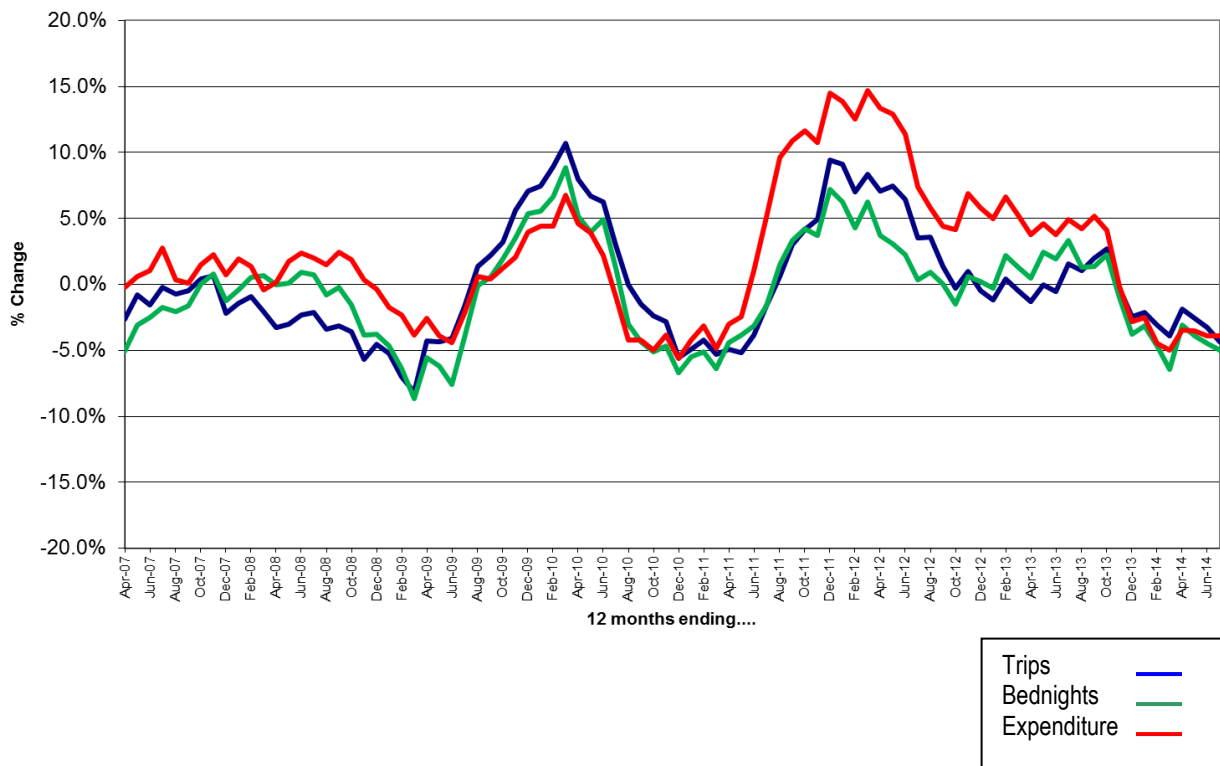
Please note: During the data processing for the September data release the Office for National Statistics (ONS) discovered an error in the derivation of total expenditure. This error affects the previously released expenditure estimates for January to September 2014. To allow time to fully investigate 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 (July 2013 vs. July 2014)
- Year to date (Jan-July 2013 vs. Jan-July 2014)
- 12 month rolling (Aug-July 2013 vs. Aug-July 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 (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: July 2014			Unweighted Trips	YTD: January - July 2014			Unweighted Trips	12 month rolling Aug 2013 - July 2014			Unweighted Trips	Month: July 2014			Unweighted Trips	YTD: January - July 2014			Unweighted Trips	12 month rolling Aug 2013 - July 2014			Unweighted Trips	
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips
TOTAL	-5.1%	-3.4%	1.6%	1689	-4.8%	-4.3%	-2.5%	8770	-4.3%	-4.8%	-3.9%	16586	TOTAL	-3.8%	-4.9%	2.6%	1373	-5.7%	-5.9%	-3.0%	7162	-4.6%	-5.7%	-5.1%	13664
PURPOSE:																									
Pure Holiday	-2.4%	-2.6%	6.1%	1010	-1.7%	-3.2%	1.8%	4389	-1.6%	-3.4%	0.1%	8124	Pure Holiday	-2.2%	-2.8%	3.5%	786	-3.4%	-4.2%	0.9%	3399	-3.5%	-5.1%	-2.6%	6346
- 1-3 nights holiday	-1.3%	1.4%	0.8%	501	-1.1%	1.4%	2.3%	2836	-1.7%	0.4%	1.1%	5065	- 1-3 nights holiday	-4.9%	0.2%	-2.7%	390	-3.9%	0.1%	0.3%	2225	-4.3%	-1.6%	-1.7%	4012
- 4+ nights holiday	-3.4%	-3.7%	8.8%	508	-2.8%	-5.8%	1.3%	1553	-1.3%	-5.5%	-1.0%	3060	- 4+ nights holiday	0.8%	-3.8%	6.7%	395	-2.4%	-6.9%	1.5%	1172	-1.8%	-7.1%	-3.6%	2330
VFR (on holiday)	5.1%	10.4%	-9.3%	313	7.2%	6.7%	2.9%	1956	2.5%	1.0%	-5.1%	3835	VFR (on holiday)	14.2%	18.4%	4.0%	270	9.1%	6.0%	5.1%	1673	5.6%	3.3%	-2.8%	3306
HOLIDAY (TOTAL)	-0.7%	-0.2%	3.7%	1322	0.9%	-0.6%	2.0%	6344	-0.3%	-2.2%	-0.9%	11960	HOLIDAY (TOTAL)	1.6%	1.3%	3.5%	1056	0.4%	-1.4%	1.7%	5069	-0.6%	-2.6%	-2.6%	9652
VFR (non-holiday)	-32.5%	-35.1%	-31.7%	160	-17.5%	-17.0%	-13.7%	1177	-13.6%	-12.9%	-18.7%	2367	VFR (non-holiday)	-30.8%	-36.9%	-37.5%	140	-18.0%	-19.6%	-18.6%	1019	-13.6%	-12.5%	-19.6%	2070
VFR (TOTAL)	-11.7%	-6.6%	-17.6%	473	-3.9%	-2.6%	-3.9%	3133	-4.4%	-4.2%	-10.5%	6202	VFR (TOTAL)	-6.7%	-3.1%	-12.7%	410	-3.3%	-4.2%	-4.9%	2692	-2.8%	-2.8%	-9.6%	5376
Business	-4.7%	-5.9%	9.5%	159	-10.1%	-11.3%	-11.9%	1016	-8.0%	-10.7%	-6.1%	1841	Business	2.2%	-8.5%	21.4%	145	-9.6%	-10.5%	-10.0%	873	-7.4%	-12.2%	-5.3%	1570
Regions:																									
West Midlands	-23.7%	-26.4%	0.9%	88	-20.4%	-24.3%	-17.5%	529	-10.0%	-16.8%	-7.6%	1072	West Midlands	-23.7%	-26.4%	0.9%	88	-20.4%	-24.3%	-17.5%	529	-10.0%	-16.8%	-7.6%	1072
East of England	8.5%	5.7%	51.1%	140	5.2%	16.5%	37.5%	697	-4.8%	0.5%	13.2%	1284	East of England	8.5%	5.7%	51.1%	140	5.2%	16.5%	37.5%	697	-4.8%	0.5%	13.2%	1284
East Midlands	0.4%	4.7%	-2.1%	118	-8.2%	0.6%	-2.4%	556	-8.5%	-4.8%	-9.9%	1052	East Midlands	0.4%	4.7%	-2.1%	118	-8.2%	0.6%	-2.4%	556	-8.5%	-4.8%	-9.9%	1052
London	1.2%	-8.1%	-4.6%	124	-7.3%	-14.7%	-0.9%	832	-6.1%	-11.4%	-5.3%	1525	London	1.2%	-8.1%	-4.6%	124	-7.3%	-14.7%	-0.9%	832	-6.1%	-11.4%	-5.3%	1525
North West	5.9%	26.8%	12.8%	191	-2.7%	1.0%	2.9%	1006	-0.2%	1.2%	-0.3%	1906	North West	5.9%	26.8%	12.8%	191	-2.7%	1.0%	2.9%	1006	-0.2%	1.2%	-0.3%	1906
North East	-17.6%	-34.2%	-17.9%	42	-15.4%	-15.6%	-30.2%	269	-18.2%	-21.5%	-27.4%	484	North East	-17.6%	-34.2%	-17.9%	42	-15.4%	-15.6%	-30.2%	269	-18.2%	-21.5%	-27.4%	484
South East	-14.7%	-24.4%	-19.8%	227	-9.8%	-13.2%	-11.2%	1208	-5.7%	-5.5%	-12.8%	2380	South East	-14.7%	-24.4%	-19.8%	227	-9.8%	-13.2%	-11.2%	1208	-5.7%	-5.5%	-12.8%	2380
South West	0.1%	1.3%	13.4%	311	-4.2%	-7.1%	-2.2%	1349	-0.9%	-4.5%	-1.5%	2684	South West	0.1%	1.3%	13.4%	311	-4.2%	-7.1%	-2.2%	1349	-0.9%	-4.5%	-1.5%	2684
Yorkshire & the Humber	-6.2%	-8.7%	-14.2%	144	2.1%	2.0%	-9.8%	793	-3.9%	-4.4%	-9.3%	1430	Yorkshire & the Humber	-6.2%	-8.7%	-14.2%	144	2.1%	2.0%	-9.8%	793	-3.9%	-4.4%	-9.3%	1430
LOCATION TYPE:																									
Seaside	1.6%	2.5%	1.4%	510	2.4%	2.7%	4.5%	1907	-1.0%	-2.9%	-5.3%	3584	Seaside	-4.1%	-8.9%	-3.8%	375	-3.1%	-4.5%	-1.4%	1446	-5.7%	-9.3%	-10.4%	2757
Large city/ large town	-2.1%	1.3%	5.0%	531	-5.2%	-5.4%	-5.0%	3448	-3.5%	-3.3%	-4.3%	6466	Large city/ large town	0.4%	-0.8%	3.0%	459	-6.5%	-7.2%	-6.3%	2977	-3.3%	-3.3%	-5.0%	5605
Small town	-14.6%	-19.5%	-8.8%	362	-7.8%	-10.2%	-6.3%	2001	-8.9%	-9.6%	-8.5%	3835	Small town	-11.0%	-13.7%	1.8%	302	-7.2%	-10.2%	-1.8%	1605	-8.3%	-9.9%	-7.8%	3121
Countryside/ village	3.5%	-1.5%	7.4%	361	-4.4%	-4.6%	0.0%	1654	-2.4%	-4.4%	4.2%	3131	Countryside/ village	7.8%	6.3%	13.7%	292	-1.5%	0.0%	3.8%	1319	-0.3%	0.1%	5.6%	2521
AGE:																									
16-24	-11.0%	-18.0%	-0.4%	147	-10.8%	-12.1%	5.5%	974	-6.0%	-10.4%	-1.1%	1819	16-24	-6.7%	-11.4%	14.3%	127	-15.9%	-17.8%	2.4%	779	-9.7%	-14.5%	-7.1%	1503
25-34	-16.0%	-5.6%	1.4%	302	-6.6%	-3.7%	-6.0%	1566	-8.7%	-6.5%	-10.5%	2898	25-34	-15.7%	-3.0%	7.3%	247	-6.5%	-2.4%	-6.2%	1297	-10.1%	-6.7%	-11.2%	2372
35-44	-2.2%	-3.3%	-2.1%	379	-9.0%	-8.1%	-8.6%	1693	-5.1%	-7.8%	-8.3%	3283	35-44	-0.5%	-8.0%	-2.1%	297	-10.2%	-11.2%	-9.7%	1365	-4.6%	-6.6%	-8.8%	2700
45-54	-3.3%	8.4%	10.6%	284	-2.4%	-1.3%	-4.5%	1556	-4.1%	-2.8%	-1.5%	2944	45-54	2.7%	8.7%	12.9%	237	-2.1%	1.7%	-5.4%	1286	-3.5%	-2.3%	-1.7%	2441
55+	1.0%	-3.9%	-1.0%	577	0.1%	-1.3%	2.3%	2982	-0.6%	-1.4%	-0.2%	5642	55+	-1.2%	-8.7%	-6.5%	463	-0.1%	-3.9%	3.2%	2436	-0.1%	-3.1%	-1.4%	4645
SEG:																									
AB	10.9%	13.8%	15.1%	595	2.3%	3.5%	0.2%	3050	-0.4%	-1.2%	-2.5%	5680	AB	17.6%	15.6%	23.0%	490	-1.4%	-1.6%	-2.0%	2473	-1.9%	-3.5%	-4.0%	4689
C1	-11.8%	-3.3%	-8.2%	494	-7.9%	-5.7%	-4.6%	2713	-4.3%	-4.2%	-4.5%	5109	C1	-13.7%	-7.4%	-7.3%	397	-6.9%	-5.7%	-3.3%	2261	-4.1%	-5.1%	-6.3%	4251
C2	-16.6%	-15.9%	4.1%	300	-10.4%	-9.1%	-1.6%	1503	-9.7%	-9.0%	-5.3%	2919	C2	-18.5%	-22.8%	-4.1%	246	-9.2%	-8.1%	2.3%	1221	-7.8%	-7.0%	-2.4%	2380
DE	-17.2%	-27.6%	-22.1%	301	-12.1%	-16.1%	-9.6%	1504	-8.8%	-10.5%	-5.6%	2878	DE	-15.7%	-21.4%	-29.3%	235	-12.7%	-15.6%	-15.0%	1202	-10.2%	-11.1%	-10.7%	2326
CHILDREN IN HH:																									
Any	-5.3%	1.1%	-2.3%	667	-1.7%	1.7%	-2.8%	3109	-2.8%	-2.7%	-5.9%	5955	Any	-6.4%	-2.0%	-2.5%	520	-2.9%	1.5%	-3.7%	2527	-3.3%	-1.2%	-7.0%	4906
None	-5.1%	-6.2%	3.5%	1022	-6.2%	-6.9%	-2.4%	5661	-5.0%	-5.8%	-3.1%	10631	None	-2.5%	-6.6%	4.9%	850	-7.0%	-9.0%	-2.8%	4633	-5.3%	-7.7%	-4.4%	8759
ACCOMMODATION:																									
Commercial accom	-4.1%	0.0%	4.1%	1122	-3.5%	-3.5%	-1.1%	5497	-3.3%	-3.9%	-2.7%	9977	Commercial accom	-2.4%	-2.7%	7.1%	901	-4.6%	-4.7%	-0.9%	4444	-5.0%	-7.1%	-3.9%	8048
- Serviced accom	-3.1%	-3.4%	-1.0%	628	-4.2%	-3.9%	-3.8%	3802	-4.0%	-5.2%	-3.0%	6798	- Serviced accom	-0.6%	-2.1%	1.9%	527	-5.0%	-2.9%	-3.6%	3151	-5.1%	-5.5%	-3.6%	5608
- Hotel/motel/guesthouse	-2.8%	-2.4%	-0.2%	549	-4.4%	-6.4%	-5.2%	3392	-3.8%	-6.6%	-3.0%	6075	- Hotel/motel/guesthouse	-0.7%	0.7%	5.5%	462	-5.2%	-5.0%	-4.5%	2827	-5.1%	-6.8%	-3.2%	5025
- Bed & Breakfast	-6.7%	-11.0%	15.0%	73	-9.3%	-2.1%	13.8%	364	-10.2%	-7.3%	-2.7%	641	- Bed & Breakfast	-4.3%	-14.0%	6.1%	58	-9.7%	1.7%	13.9%	289	-8.8%	-6.0%	-4.1%	523
Total self-catering rented	-3.2%	1.7%	17.5%	478	-1.9%	-3.1%	5.5%	1593	-0.5%	-1.5%	-0.6%	2986	Total self-catering rented	-0.1%	1.0%	21.9%	369	-3.5%	-5.1%	6.4%	1216	-3.5%	-7.4%	-3.3%	2274
- Camping & Caravanning (inc. owned caravans)	-6.9%	-17.5%	5.6%	384	-3.5%	-10.5%	2.1%	1179	-2.2%	-10.1%	0.7%	2154	- Camping & Caravanning (inc. owned caravans)	-10.8%	-23.5%	1.3%	277	-9.4%	-15.8%	-0.8%	862	-8.6%	-16.3%	-6.8%	1565
- Other self-catering rented	31.7%	33.9%	27.9%	188	11.5%	7.6%	7.5%	725	6.4%	4.2%	-2.0%	1335	- Other self-catering rented	49.0%	53.5%	42.9%	147	15.3%	11.9%	11.2%	545	6.3%	2.2%	-2.4%	1007
Hostels	-87.0%	-86.4%	-83.3%	2	11.6%	-16.5%	24.1%	49	-16.0%	-16.6%	-30.3%	119	Hostels	-89.7%	-97.7%	#VALUE!	1	24.1%	-37.6%	7.7%	29	-12.9%	-19.0%	-52.7%	88
Own home/friends/relatives'	-3.0%	-8.6%	-10.9%	582	-5.7%	-5.2%	-8.8%	3244	-5.3%	-6.5%	-10.8%	6523	Own home/friends/relatives'	-2.3%	-7.7%	-14.7%	474	-6.8%	-7.0%	-11.7%	2681	-4.0%	-3.8%	-11.7%	5501