

GB TOURISM SURVEY - June 2014

SUMMARY OF RESULTS

1. Headlines

- In June 2014, there were 9.7 million domestic overnight trips in Great Britain, -12% down on June 2013, when there were 11.0 million trips.
- Nights fell slightly (by -14%) to 29.0 million, with expenditure down -6% compared to June last year, falling to £2.1 billion.
- Looking at England alone, trips were also down against June last year, at 8.0 million (-13%), with nights down -16% to 22.6 million. Expenditure decreased by -5% against June last year, falling to £1.8 billion.
- For the year to date, trips were down in Great Britain by -5% at 50.6 million. Nights and spend were also down by -5% and -4% respectively.

2. Context

- Temperatures in June were above average across the UK. Although unsettled at the beginning and end of the month, most of the month was warm, dry and sunny.
- The FIFA World Cup started on 12th June and ran through into July, which might have had an impact on trip taking and other leisure behaviour in June 2014.

3. Trip Characteristics – January-June 2014

- Over the first half of the year holiday trips declined by -2% to 23.3m, with nights down -3% to 71.1m and spend flat (0%) at £5.3 billion.
- Trips, nights and spend on visits to friends and relatives (VFR) were also down (by -2%, -3% and -1% respectively). However, VFR trips for leisure purposes are actually showing an increase (+8%), while non-holiday VFR trips have declined (-15%).
- Business trips (-11%), nights (-12%) and spend (-16%) have all declined for the year so far, though the month of June saw increases compared to June 2013.
- Trips to the seaside are up for the year so far, +3%, with all other destination types showing declines (-6% for large cities/towns, -6% for small towns, and -7% for countryside/village locations).
- Declines in trip taking are being driven by those with no children in the household (-7% vs +1% for those with kids), and younger age groups (-11% of 16-24's vs. 0% change among the 55+ age group). Trip taking among social class DE's have also declined, at -11%, compared with a 0% change in trip taking for social class AB when compared with the same period last year.

4. Overseas Travel by UK Residents

- The number of trips taken abroad by UK residents in June decreased by -3% compared to June 2013, with expenditure down -21%. In the year to date volume rose by +4% while spend fell by -16%.

5. Other Tourism Surveys

- Room occupancy in June showed a very slight increase, of +1%, rising to 76%, whilst bedspace occupancy showed a decrease, by -2% to 55%.
- The volume of day visits in Great Britain in the three months to June 2014 decreased by -1% when compared with the same period last year, falling from 416 million to 412 million. The value of those visits also fell during the same period, at £12.7 billion (down 12% from £14.4 billion).

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
June '14									
GB	11.0	9.7	-12%	33.8	29.0	-14%	2,280	2,133	-6%
England	9.1	8.0	-13%	26.9	22.6	-16%	1,835	1,753	-5%
Jan-June '14									
GB	53.1	50.6	-5%	147.1	139.5	-5%	9,870	9,499	-4%
England	44.1	41.3	-6%	117.5	109.4	-7%	8,010	7,640	-5%

Purpose of Trip – June 2014

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
GB									
Holiday	5.7	4.9	-14%	20.0	17.1	-14%	1,491	1,269	-15%
Business	1.5	1.7	+19%	3.0	3.8	+27%	346	412	+19%
VFR	3.5	2.7	-21%	9.7	7.4	-24%	385	374	-3%
England									
Holiday	4.5	3.8	-15%	14.9	12.5	-16%	1,166	1,003	-14%
Business	1.2	1.5	+22%	2.6	3.4	+31%	290	366	+26%
VFR	3.0	2.4	-22%	8.4	6.0	-29%	330	316	-4%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	23.6	23.3	-2%	73.6	71.1	-3%	5,263	5,284	0%
Business	8.7	7.7	-11%	19.7	17.3	-12%	2,197	1,848	-16%
VFR	18.7	18.2	-2%	48.4	46.8	-3%	2,078	2,067	-1%
England									
Holiday	18.7	18.0	-4%	55.7	53.0	-5%	4,104	4,105	0%
Business	7.5	6.6	-12%	16.0	14.3	-11%	1,846	1,558	-16%
VFR	16.1	15.6	-3%	41.0	38.3	-7%	1,766	1,706	-3%

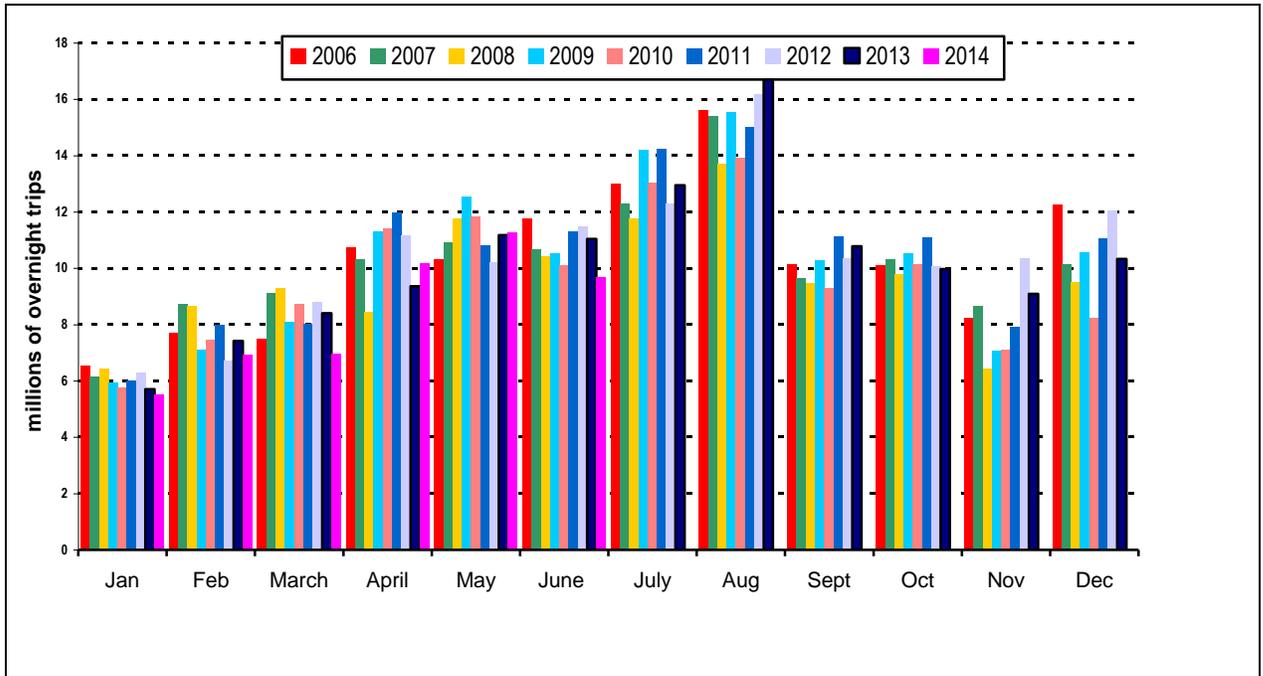
Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2013	2014	% +/-	2013	2014	% +/-
June 2014	6.0	5.8	-3%	3.5	2.6	-21%
Jan '14 – June '14	26.1	27.1	+4%	15.3	12.8	-16%
July '13 – June '14	56.9	59.5	+5%	33.3	32.4	-3%

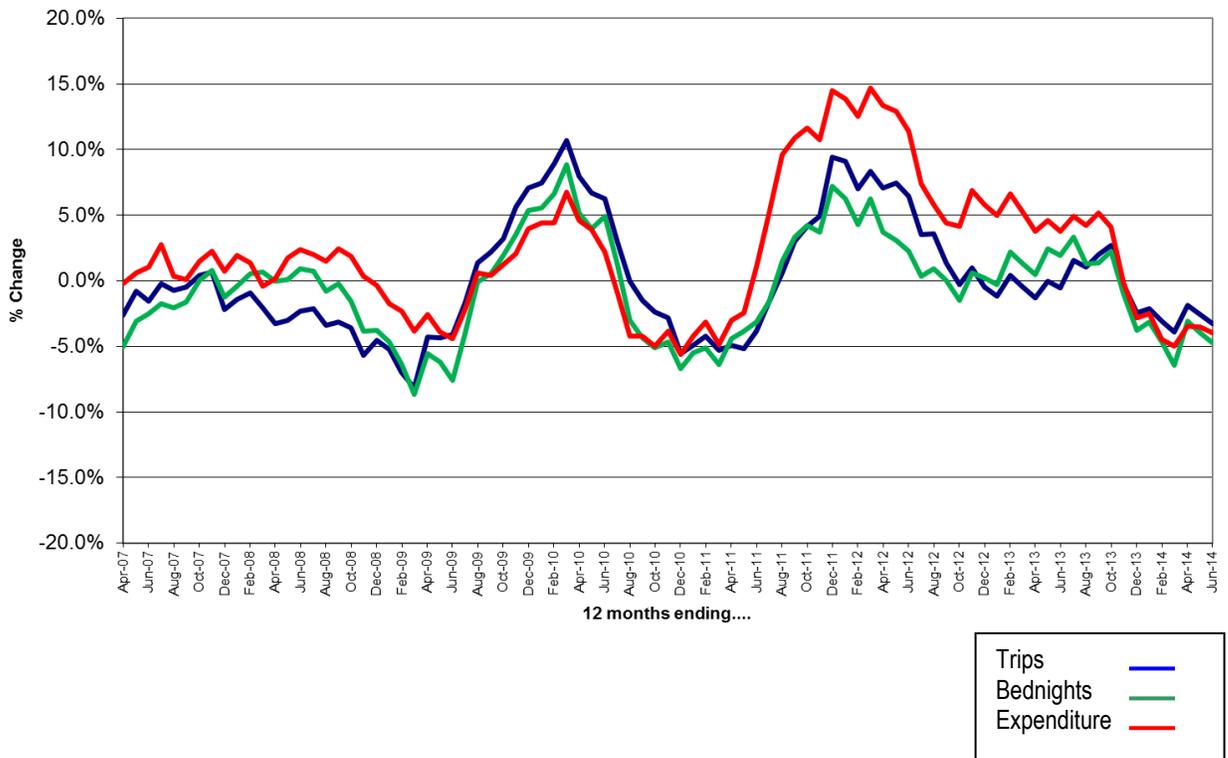
TREND CHARTS



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 (June 2013 vs. June 2014)
- Year to date (Jan-June 2013 vs. Jan-June 2014)
- 12 month rolling (July-June 2013 vs. July-June 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: Below Average Performance Average Performance Below Average Performance

NOTE: In the tables below, 'average performance' refers to the total trips/ights/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: June 2014			Unweighted Trips	YTD: January - June 2014			Unweighted Trips	12 month rolling July 2013 - June 2014			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-12.2%	-14.0%	-6.4%	1350	-4.8%	-5.2%	-3.8%	7079	-3.3%	-4.6%	-3.9%	16833
PURPOSE:												
Pure Holiday	-14.2%	-14.3%	-14.9%	715	-1.5%	-3.4%	0.4%	3379	-0.2%	-2.1%	-0.7%	8207
- 1-3 nights holiday	-13.7%	-8.8%	-17.8%	425	-1.1%	1.4%	2.6%	2334	-0.8%	1.5%	0.9%	5104
- 4+ nights holiday	-14.9%	-16.8%	-12.2%	290	-2.4%	-6.9%	-2.6%	1045	0.8%	-4.0%	-2.5%	3103
VFR (on holiday)	-15.6%	-25.2%	0.9%	241	7.6%	2.9%	5.8%	1641	2.2%	-0.6%	-2.6%	3848
HOLIDAY (TOTAL)	-14.5%	-16.8%	-12.9%	956	1.3%	-1.6%	1.4%	5020	0.6%	-1.6%	-1.1%	12054
VFR (non-holiday)	-27.9%	-21.4%	-7.8%	166	-14.5%	-12.9%	-9.5%	1017	-9.8%	-10.2%	-14.2%	2463
VFR (TOTAL)	-21.2%	-23.8%	-2.9%	407	-2.4%	-3.4%	-0.5%	2658	-2.9%	-4.2%	-7.3%	6311
Business	19.3%	26.7%	19.1%	185	-11.1%	-12.4%	-15.9%	857	-7.9%	-11.6%	-7.4%	1892
Regions:												
West Midlands	-33.9%	-35.5%	-31.4%	73	-19.7%	-23.7%	-21.2%	441	-7.3%	-13.3%	-8.5%	1111
East of England	-17.7%	-8.8%	37.2%	102	4.1%	15.2%	32.1%	557	-6.3%	-5.7%	0.6%	1289
East Midlands	-9.6%	0.3%	-10.1%	91	-10.1%	-0.7%	-2.3%	438	-8.0%	-4.3%	-8.9%	1057
London	-8.5%	-1.2%	36.0%	111	-8.8%	-16.1%	0.0%	708	-5.7%	-10.4%	-3.0%	1545
North West	-18.5%	-31.1%	-8.5%	141	-4.5%	-5.3%	0.7%	815	-1.7%	-4.4%	-3.2%	1900
North East	15.2%	-5.4%	-3.8%	51	-15.0%	-10.7%	-32.0%	227	-17.9%	-17.5%	-28.7%	500
South East	-14.5%	-19.6%	-13.1%	209	-8.8%	-10.8%	-8.8%	979	-2.3%	0.4%	-8.6%	2448
South West	-9.2%	-11.9%	-14.3%	219	-5.5%	-10.5%	-7.5%	1039	-1.0%	-4.9%	-3.3%	2713
Yorkshire & the Humber	5.1%	-21.3%	-11.8%	124	4.2%	5.4%	-8.7%	648	-2.5%	-2.6%	-5.9%	1447
LOCATION TYPE:												
Seaside	-3.5%	-12.9%	-8.8%	330	2.7%	2.8%	5.8%	1397	0.8%	-1.8%	-3.8%	3609
Large city/ large town	-1.7%	-3.5%	-1.8%	523	-5.8%	-7.1%	-7.0%	2916	-3.3%	-3.4%	-4.9%	6551
Small town	-8.6%	-10.6%	-1.2%	306	-6.2%	-8.8%	-5.9%	1638	-7.1%	-7.3%	-7.0%	3924
Countryside/ village	-33.9%	-32.3%	-15.4%	228	-6.5%	-6.4%	-2.3%	1292	-3.7%	-6.5%	1.6%	3148
AGE:												
16-24	-28.1%	-40.2%	1.4%	135	-10.9%	-13.9%	6.6%	826	-4.6%	-10.7%	-0.9%	1865
25-34	-19.2%	-19.8%	-16.5%	252	-3.9%	-3.0%	-8.0%	1263	-4.8%	-4.7%	-9.8%	2987
35-44	-22.3%	-23.4%	-17.1%	198	-10.8%	-9.9%	-10.6%	1314	-4.0%	-6.6%	-7.5%	3309
45-54	8.8%	10.2%	2.9%	231	-2.2%	-4.4%	-8.3%	1272	-4.5%	-4.0%	-3.5%	2972
55+	-6.2%	-7.7%	-4.6%	534	-0.2%	-1.0%	3.3%	2403	-0.5%	-1.4%	0.1%	5700
SEG:												
AB	-3.9%	-7.3%	-5.9%	468	0.4%	0.4%	-3.6%	2455	-1.5%	-3.6%	-4.6%	5716
C1	-14.0%	-13.4%	-0.3%	408	-7.0%	-7.9%	-3.7%	2218	-1.9%	-4.8%	-2.1%	5213
C2	-26.2%	-22.4%	-15.4%	217	-8.7%	-6.6%	-3.3%	1203	-6.9%	-5.0%	-6.9%	3005
DE	-13.5%	-20.7%	-11.5%	257	-10.9%	-13.1%	-5.5%	1202	-7.2%	-5.9%	-2.1%	2899
CHILDREN IN HH:												
Any	-4.6%	-8.9%	-4.9%	420	-0.7%	2.0%	-3.0%	2442	-1.5%	-2.3%	-6.0%	6023
None	-14.8%	-15.5%	-6.9%	930	-6.5%	-7.9%	-4.0%	4636	-4.1%	-5.6%	-3.2%	10810
ACCOMMODATION:												
Commercial accom	-5.9%	-10.2%	-5.0%	923	-3.3%	-4.7%	-2.6%	4373	-2.1%	-3.6%	-2.9%	10119
- Serviced accom	-1.9%	-4.8%	3.4%	635	-4.4%	-4.1%	-4.4%	3176	-3.4%	-4.1%	-2.6%	6882
- Hotel/motel/guesthouse	-0.1%	-6.7%	2.5%	567	-4.7%	-7.3%	-6.3%	2844	-3.2%	-5.7%	-2.8%	6148
- Bed & Breakfast	-22.5%	-6.4%	-11.7%	62	-10.0%	0.6%	13.4%	292	-9.8%	-5.8%	-5.5%	652
Total self-catering rented	-18.1%	-18.2%	-22.4%	269	-1.4%	-5.5%	0.1%	1114	1.4%	-2.0%	-3.3%	3030
- Camping & Caravanning (inc. owned caravans)	-9.2%	-9.6%	-11.8%	218	-1.8%	-6.6%	-0.5%	792	2.9%	-3.4%	1.9%	2203
- Other self-catering rented	-24.1%	-24.2%	-30.2%	99	5.7%	-1.4%	0.5%	536	0.0%	-3.0%	-6.4%	1302
Hostels	18.4%	28.8%	11.1%	8	58.3%	28.3%	77.8%	47	-16.6%	-6.5%	-28.4%	132
Own home/friends'/relatives'	-25.5%	-22.5%	-18.7%	412	-6.3%	-5.8%	-8.5%	2660	-4.7%	-5.9%	-7.8%	6601

	England											
	Month: June 2014			Unweighted Trips	YTD: January - June 2014			Unweighted Trips	12 month rolling July 2013 - June 2014			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-12.5%	-16.1%	-4.5%	1108	-6.2%	-6.9%	-4.6%	5787	-4.0%	-5.4%	-5.5%	13847
PURPOSE:												
Pure Holiday	-15.0%	-15.8%	-14.0%	557	-3.7%	-4.8%	0.0%	2613	-2.3%	-3.9%	-3.1%	6410
- 1-3 nights holiday	-15.2%	-9.6%	-16.9%	339	-3.6%	0.1%	1.0%	1834	-3.2%	-0.8%	-1.8%	4057
- 4+ nights holiday	-14.7%	-18.9%	-11.1%	216	-4.0%	-8.7%	-1.4%	777	-0.5%	-5.7%	-4.7%	2345
VFR (on holiday)	-16.6%	-30.3%	1.1%	209	8.0%	-0.4%	4.8%	1401	3.9%	0.6%	-2.5%	3295
HOLIDAY (TOTAL)	-15.4%	-19.6%	-11.9%	765	0.0%	-3.5%	1.0%	4012	-0.3%	-2.5%	-3.0%	9703
VFR (non-holiday)	-28.6%	-26.4%	-11.5%	142	-15.5%	-15.8%	-14.6%	878	-10.2%	-9.7%	-13.8%	2148
VFR (TOTAL)	-22.1%	-28.9%	-4.2%	350	-2.7%	-6.6%	-3.4%	2279	-2.3%	-3.3%	-7.1%	5445
Business	22.3%	31.4%	26.2%	160	-11.9%	-11.0%	-15.6%	728	-7.6%	-12.3%	-8.2%	1603
Regions:												
West Midlands	-33.9%	-35.5%	-31.4%	73	-19.7%	-23.7%	-21.2%	441	-7.3%	-13.3%	-8.5%	1111
East of England	-17.7%	-8.8%	37.2%	102	4.1%	15.2%	32.1%	557	-6.3%	-5.7%	0.6%	1289
East Midlands	-9.6%	0.3%	-10.1%	91	-10.1%	-0.7%	-2.3%	438	-8.0%	-4.3%	-8.9%	1057
London	-8.5%	-1.2%	36.0%	111	-8.8%	-16.1%	0.0%	708	-5.7%	-10.4%	-3.0%	1545
North West	-18.5%	-31.1%	-8.5%	141	-4.5%	-5.3%	0.7%	815	-1.7%	-4.4%	-3.2%	1900
North East	15.2%	-5.4%	-3.8%	51	-15.0%	-10.7%	-32.0%	227	-17.9%	-17.5%	-28.7%	500
South East	-14.5%	-19.6%	-13.1%	209	-8.8%	-10.8%	-8.8%	979	-2.3%	0.4%	-8.6%	2448
South West	-9.2%	-11.9%	-14.3%	219	-5.5%	-10.5%	-7.5%	1039	-1.0%	-4.9%	-3.3%	2713
Yorkshire & the Humber	5.1%	-21.3%	-11.8%	124	4.2%	5.4%	-8.7%	648	-2.5%	-2.6%	-5.9%	1447
LOCATION TYPE:												
Seaside	-7.8%	-14.4%	-5.7%	260	-2.8%	-2.3%	-0.1%	1071	-3.7%	-7.1%	-8.3%	2799
Large city/ large town	0.3%	-0.6%	1.5%	459	-7.7%	-8.7%	-8.0%	2517	-3.6%	-3.5%	-5.5%	5666
Small town	-16.5%	-23.8%	0.0%	234	-6.3%	-11.2%	-3.3%	1302	-6.5%	-8.0%	-7.7%	3180
Countryside/ village	-34.3%	-31.4%	-15.7%	179	-3.9%	-3.1%	0.6%	1027	-1.8%	-3.1%	1.3%	2524
AGE:												
16-24	-28.5%	-47.8%	1.1%	111	-18.1%	-23.7%	-1.3%	649	-9.3%	-15.0%	-8.7%	1534
25-34	-16.0%	-13.4%	-5.9%	218	-3.9%	-2.2%	-9.8%	1049	-6.5%	-5.9%	-11.9%	2444
35-44	-25.1%	-25.4%	-22.9%	165	-12.6%	-12.4%	-12.0%	1068	-4.7%	-5.9%	-9.1%	2716
45-54	10.9%	14.2%	4.5%	194	-3.2%	-0.4%	-9.6%	1049	-4.4%	-3.7%	-4.4%	2450
55+	-7.6%	-11.2%	-1.3%	416	0.2%	-3.0%	6.0%	1971	0.5%	-2.0%	0.6%	4703
SEG:												
AB	-8.1%	-11.8%	-8.8%	374	-5.2%	-6.2%	-7.8%	1982	-4.0%	-6.5%	-7.6%	4693
C1	-8.2%	-7.9%	13.1%	354	-5.2%	-6.9%	-2.3%	1863	-1.2%	-4.2%	-3.1%	4346
C2	-25.2%	-24.1%	-8.7%	178	-6.4%	-1.9%	4.3%	975	-4.8%	-1.4%	-3.1%	2457
DE	-19.2%	-32.4%	-26.3%	199	-12.1%	-15.2%	-10.3%	966	-9.6%	-9.8%	-6.8%	2336
CHILDREN IN HH:												
Any	-4.8%	-4.9%	-0.3%	358	-1.9%	3.0%	-4.1%	2008	-2.5%	-1.2%	-7.6%	4956
None	-15.3%	-19.4%	-5.6%	751	-8.0%	-10.6%	-4.8%	3780	-4.7%	-7.2%	-4.6%	8882
ACCOMMODATION:												
Commercial accom	-5.7%	-9.1%	-2.4%	749	-5.2%	-5.4%	-3.1%	3540	-3.8%	-6.1%	-4.6%	8147
- Serviced accom	1.5%	-0.2%	9.4%	539	-5.9%	-3.1%	-4.8%	2626	-4.7%	-4.3%	-3.6%	5665
- Hotel/motel/guesthouse	1.5%	-5.7%	5.7%	478	-6.0%	-6.3%	-6.5%	2367	-4.7%	-6.3%	-3.8%	5077
- Bed & Breakfast	-8.0%	19.2%	13.9%	55	-11.1%	6.6%	16.5%	231	-8.2%	-2.8%	-4.3%	531
Total self-catering rented	-24.7%	-21.3%	-26.4%	195	-5.0%	-8.4%	-0.4%	843	-2.2%	-7.4%	-6.8%	2296
- Camping & Caravanning (inc. owned caravans)	-20.3%	-19.0%	-12.3%	152	-8.7%	-11.7%	-1.9%	581	-3.2%	-8.2%	-4.8%	1