

GB TOURISM SURVEY - March 2014

SUMMARY OF RESULTS

1. Headlines

- In March 2014, there were 7.0 million domestic overnight trips in Great Britain, -17% fewer than in March 2013, when there were 8.4 million trips.
- Nights and expenditure were also down compared to last year. Nights fell by -27% to 17.8m, and spend fell -13% to £1.3bn.
- For England, trips, nights and spend were also down year-on-year. Trips fell by -21% to 5.5 million, nights by -31% to 13.2 million and expenditure -18% to £980 million.
- For the year January to March, trips were down in Great Britain by -10% to 19.4 million. Nights and spend were also down, by -14% and -10% respectively.

2. Context

- Easter holidays began in late March in 2013, but did not start until April in 2014. As such, some Easter holiday trips would have fallen in March in 2013, but most will have fallen in April for 2014, which is likely to have had an impact on results.
- While March was a mostly mild month after some early unsettled weather, this came after three very wet and stormy months previously that may have continued to impact travel behavior.

3. Trip Characteristics

- In the year to March, a decrease was recorded for all trip types. Although positively spend on holidays was up slightly (+3% to £1.7bn), holiday trips decreased by -5% to 7.5m. The expenditure increase was driven by short breaks (1-3 nights), up 7%, while longer holidays (4+ nights) saw a decrease in spend (-7%).
- Trips and spend on visits to friends and relatives (VFR) are down (by -6% and -13% respectively). However, VFR trips for leisure purposes have increased (5%), while non-holiday VFR trips have declined (-17%).
- Business trips (-19%) and expenditure (-24%) have both declined for the year to date.
- Trips have decreased across all age groups and social grades. However, the decrease in trips recorded by those aged 55+ (-2%) is lower than that for other age groups.

4. Overseas Travel by UK Residents

- The number of trips taken abroad by UK residents in March decreased by -2% compared to March 2013, with expenditure down -12%.

5. Other Tourism Surveys

- Room occupancy in England in February remained flat compared to March 2013 (+1%).
- The volume of day visits in Great Britain in the three months to March 2014 declined slightly by -1% when compared with the same period last year, falling from 335 million to 331 million. The value of those visits, however also, increased during the same period, from £10.9bn to £11.3bn (an increase of 4%).
- 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	% +/-
March '14									
GB	8.4	7.0	-17%	24.6	17.8	-27%	1,455	1,267	-13%
England	7.0	5.5	-21%	19.1	13.2	-31%	1,198	980	-18%
Jan-Mar '14									
GB	21.5	19.4	-10%	56.3	48.2	-14%	3,786	3,396	-10%
England	18.0	16.1	-11%	45.0	38.9	-14%	3,121	2,787	-11%

Purpose of Trip – March 2014

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
GB									
Holiday	3.6	3.0	-17%	12.0	8.3	-31%	766	688	-10%
Business	1.2	1.1	-7%	2.9	2.9	+1%	261	280	+7%
VFR	3.2	2.7	-16%	8.6	6.3	-27%	360	275	-24%
England									
Holiday	2.8	2.2	-21%	8.6	5.8	-32%	607	530	-13%
Business	1.1	0.9	-16%	2.3	2.0	-16%	222	209	-6%
VFR	2.7	2.3	-18%	7.1	5.2	-27%	305	226	-26%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	7.9	7.5	-5%	21.8	19.1	-12%	1,603	1,653	+3%
Business	4.2	3.4	-19%	9.9	7.6	-23%	1,088	829	-24%
VFR	8.5	8.0	-6%	22.1	19.1	-14%	929	810	-13%
England									
Holiday	6.2	5.9	-5%	16.0	14.8	-8%	1,253	1,332	+6%
Business	3.6	2.8	-23%	8.2	5.9	-28%	927	676	-27%
VFR	7.3	7.0	-5%	18.6	16.1	-14%	789	687	-13%

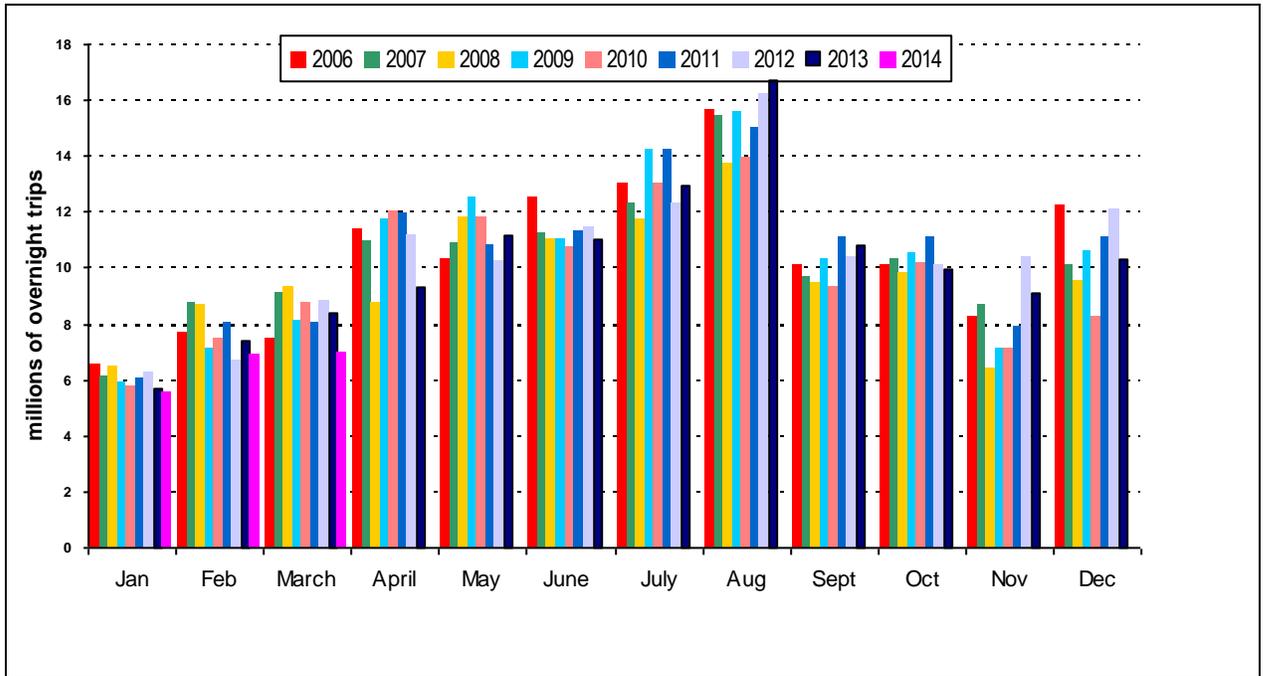
Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2013	2014	% +/-	2013	2014	% +/-
March 2014	3.5	3.4	-2%	2.1	1.8	-12%
Jan '14 – Mar '14	10.2	10.4	+2%	6.0	5.5	-8%
April '13 – Mar '14	56.5	58.7	+4%	32.6	34.4	+6%

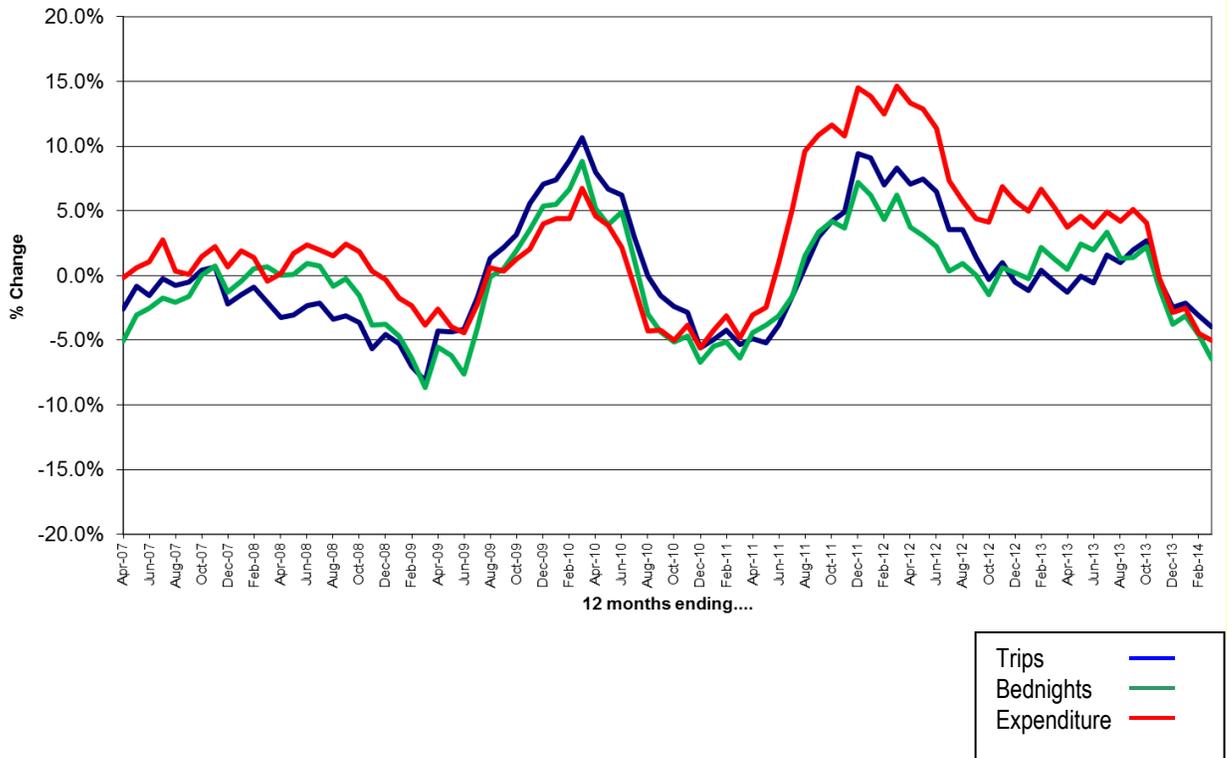
TREND CHARTS



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 (March 2013 vs. March 2014)
- Year to date (Jan-Mar 2013 vs. Jan-Mar 2014)
- 12 month rolling (April-Mar 2013 vs. April-Mar 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/s 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: March 2014			Unweighted Trips	YTD: January - March 2014			Unweighted Trips	12 month rolling Apr 2013 - Mar 2014			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-17.3%	-27.4%	-12.9%	975	-9.8%	-14.3%	-10.3%	2686	-3.9%	-6.2%	-5.0%	16960
PURPOSE:												
Pure Holiday	-17.2%	-31.0%	-10.2%	425	-4.5%	-12.1%	3.1%	1068	-1.7%	-4.0%	-1.4%	8220
- 1-3 nights holiday	-11.3%	-14.2%	-7.1%	319	-0.5%	0.8%	7.3%	861	-1.2%	-1.2%	-0.6%	5136
- 4+ nights holiday	-31.1%	-41.9%	-15.6%	106	-18.6%	-25.1%	-7.3%	207	-2.6%	-5.5%	-2.2%	3083
VFR (on holiday)	-23.6%	-37.0%	-32.8%	231	4.8%	-7.4%	1.2%	703	1.7%	-1.6%	-2.1%	3759
HOLIDAY (TOTAL)	-19.5%	-33.0%	-15.4%	656	-1.1%	-10.4%	2.7%	1772	-0.7%	-3.3%	-1.5%	11979
VFR (non-holiday)	-3.5%	-6.1%	-6.3%	166	-17.4%	-22.0%	-30.3%	460	-8.9%	-11.5%	-17.6%	2559
VFR (TOTAL)	-16.0%	-27.2%	-23.6%	396	-5.7%	-13.6%	-12.8%	1164	-2.9%	-5.4%	-8.4%	6318
Business	-7.4%	1.3%	7.3%	129	-19.1%	-23.2%	-23.8%	387	-9.9%	-16.2%	-9.4%	1956
Regions:												
West Midlands	-13.5%	-5.5%	3.3%	63	-17.2%	-20.2%	-23.3%	183	2.3%	-5.7%	0.6%	1164
East of England	-7.3%	-1.6%	26.8%	79	9.3%	15.1%	16.0%	217	-7.3%	-10.4%	-10.5%	1276
East Midlands	-17.7%	-18.1%	-7.7%	55	-7.9%	1.3%	-5.3%	165	-2.7%	-6.5%	-10.9%	1100
London	-22.7%	-39.3%	-17.8%	97	-12.5%	-25.4%	-8.9%	308	-2.7%	-7.9%	-4.5%	1562
North West	-11.9%	-18.6%	-3.3%	122	-13.5%	-12.7%	2.3%	308	-3.3%	-4.5%	-4.6%	1897
North East	-54.3%	-64.5%	-42.9%	29	-35.4%	-25.4%	-39.2%	84	-19.1%	-17.7%	-17.6%	515
South East	-5.1%	-13.4%	-25.0%	136	-10.7%	-15.1%	-14.7%	356	0.5%	1.0%	-11.2%	2525
South West	-32.2%	-49.0%	-30.5%	123	-10.6%	-23.3%	-7.0%	357	-3.6%	-5.9%	-0.6%	2735
Yorkshire & the Humber	-29.5%	-37.2%	-39.1%	90	-8.2%	-6.1%	-27.0%	270	-11.9%	-9.1%	-9.2%	1423
LOCATION TYPE:												
Seaside	-33.9%	-39.7%	-32.8%	131	-9.6%	-17.1%	-11.7%	351	-4.6%	-7.9%	-9.6%	3530
Large city/ large town	-19.6%	-25.5%	-6.3%	412	-9.5%	-13.3%	-8.7%	1275	-2.4%	-3.0%	-2.2%	6644
Small town	-8.8%	-18.6%	-23.4%	265	-10.6%	-15.3%	-16.9%	640	-7.9%	-7.9%	-10.7%	3962
Countryside/ village	-9.1%	-29.1%	6.6%	186	-11.0%	-13.3%	-4.4%	458	-4.0%	-7.2%	0.9%	3211
AGE:												
16-24	-15.8%	-34.0%	0.8%	135	-8.0%	-10.8%	6.2%	385	0.0%	-6.1%	-5.2%	1942
25-34	-4.6%	-5.8%	6.1%	190	-10.3%	-9.3%	-13.4%	481	-6.0%	-6.5%	-10.0%	2980
35-44	-29.2%	-42.6%	-22.4%	162	-15.3%	-25.7%	-15.8%	474	-2.2%	-8.7%	-7.7%	3388
45-54	-25.5%	-46.6%	-28.9%	152	-14.9%	-25.0%	-19.6%	478	-10.8%	-10.4%	-5.4%	2933
55+	-11.1%	-11.2%	-5.4%	337	-2.2%	-3.9%	-1.0%	868	-0.4%	-2.2%	-0.1%	5717
SEG:												
AB	-22.5%	-25.6%	-19.3%	329	-7.9%	-10.2%	-11.8%	956	-4.4%	-6.8%	-6.1%	5753
C1	-10.4%	-21.4%	2.7%	302	-8.3%	-14.7%	-7.5%	868	-0.2%	-4.3%	-1.9%	5226
C2	6.8%	-23.6%	-1.3%	182	-9.4%	-9.9%	-0.9%	435	-6.5%	-6.8%	-5.9%	3058
DE	-37.4%	-47.3%	-37.6%	162	-20.6%	-31.1%	-24.5%	427	-8.0%	-8.1%	-7.5%	2922
CHILDREN IN HH:												
Any	-25.0%	-39.8%	-23.3%	286	-15.6%	-20.7%	-22.1%	814	-5.5%	-8.4%	-11.0%	5922
None	-14.2%	-22.6%	-9.4%	688	-7.4%	-11.9%	-6.0%	1872	-3.2%	-5.2%	-2.5%	11038
ACCOMMODATION:												
Commercial accom	-18.2%	-26.9%	-8.1%	549	-9.2%	-11.5%	-7.4%	1541	-3.3%	-5.1%	-3.6%	10150
- Serviced accom	-14.4%	-17.9%	-4.9%	438	-9.7%	-10.0%	-7.7%	1274	-3.4%	-5.2%	-2.6%	6917
- Hotel/motel/guesthouse	-12.0%	-16.0%	-5.0%	400	-9.7%	-13.2%	-9.7%	1155	-2.8%	-5.4%	-2.2%	6187
- Bed & Breakfast	-37.2%	-37.4%	-7.7%	36	-13.1%	0.5%	13.0%	107	-9.9%	-11.9%	-15.3%	670
Total self-catering rented	-28.3%	-35.2%	-18.0%	106	-5.2%	-10.3%	-7.3%	233	-0.9%	-3.0%	-4.5%	3044
- Camping & Caravanning (inc. owned caravans)	-38.4%	-48.2%	-19.5%	64	-21.2%	-29.3%	-10.0%	104	-1.5%	-7.7%	-4.7%	2197
- Other self-catering rented	-21.8%	-29.5%	-18.5%	66	-0.3%	-6.3%	-7.5%	163	-3.7%	-2.0%	-4.2%	1277
Hostels	-54.5%	-58.3%	0.0%	2	39.7%	-6.1%	77.8%	15	-34.9%	-26.4%	-43.0%	120
Own home/friends/relatives	-15.2%	-31.3%	-27.2%	412	-9.5%	-18.1%	-17.5%	1119	-3.9%	-7.2%	-7.6%	6687

	England											
	Month: March 2014			Unweighted Trips	YTD: January - March 2014			Unweighted Trips	12 month rolling Apr 2013 - Mar 2014			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-21.0%	-30.7%	-18.2%	773	-11.0%	-13.6%	-10.7%	2222	-4.0%	-5.9%	-6.0%	14007
PURPOSE:												
Pure Holiday	-20.6%	-32.4%	-12.7%	316	-5.2%	-7.5%	6.3%	837	-2.6%	-4.4%	-3.4%	6475
- 1-3 nights holiday	-16.7%	-18.6%	-9.5%	241	-3.7%	-0.4%	8.2%	677	-2.4%	-2.3%	-2.5%	4108
- 4+ nights holiday	-31.1%	-43.0%	-19.4%	75	-11.2%	-16.0%	0.3%	161	-3.0%	-5.6%	-4.5%	2359
VFR (on holiday)	-23.7%	-36.3%	-33.5%	190	6.9%	-6.4%	3.1%	607	3.9%	2.4%	-0.5%	3226
HOLIDAY (TOTAL)	-21.8%	-33.8%	-17.6%	505	-0.6%	-7.1%	5.5%	1443	-0.5%	-2.4%	-2.9%	9701
VFR (non-holiday)	-8.5%	-10.0%	-13.7%	145	-17.4%	-22.7%	-31.2%	408	-9.4%	-10.9%	-14.7%	2241
VFR (TOTAL)	-17.6%	-27.0%	-25.9%	334	-4.8%	-13.7%	-12.9%	1016	-2.1%	-2.9%	-6.4%	5467
Business	-15.6%	-15.8%	-5.9%	104	-23.3%	-28.3%	-27.1%	316	-9.6%	-19.2%	-10.7%	1646
Regions:												
West Midlands	-13.5%	-5.5%	3.3%	63	-17.2%	-20.2%	-23.3%	183	2.3%	-5.7%	0.6%	1164
East of England	-7.3%	-1.6%	26.8%	79	9.3%	15.1%	16.0%	217	-7.3%	-10.4%	-10.5%	1276
East Midlands	-17.7%	-18.1%	-7.7%	55	-7.9%	1.3%	-5.3%	165	-2.7%	-6.5%	-10.9%	1100
London	-22.7%	-39.3%	-17.8%	97	-12.5%	-25.4%	-8.9%	308	-2.7%	-7.9%	-4.5%	1562
North West	-11.9%	-18.6%	-3.3%	122	-13.5%	-12.7%	2.3%	308	-3.3%	-4.5%	-4.6%	1897
North East	-54.3%	-64.5%	-42.9%	29	-35.4%	-25.4%	-39.2%	84	-19.1%	-17.7%	-17.6%	515
South East	-5.1%	-13.4%	-25.0%	136	-10.7%	-15.1%	-14.7%	356	0.5%	1.0%	-11.2%	2525
South West	-32.2%	-49.0%	-30.5%	123	-10.6%	-23.3%	-7.0%	357	-3.6%	-5.9%	-0.6%	2735
Yorkshire & the Humber	-29.5%	-37.2%	-39.1%	90	-8.2%	-6.1%	-27.0%	270	-11.9%	-9.1%	-9.2%	1423
LOCATION TYPE:												
Seaside	-35.6%	-43.1%	-33.0%	95	-12.7%	-20.4%	-17.1%	273	-6.6%	-10.8%	-12.4%	2786
Large city/ large town	-24.3%	-32.4%	-12.4%	346	-12.7%	-16.3%	-11.7%	1089	-2.0%	-2.7%	-2.3%	5761
Small town	-12.6%	-20.7%	-32.0%	209	-9.9%	-12.0%	-15.1%	523	-7.0%	-7.4%	-12.0%	3214
Countryside/ village	-11.3%	-27.7%	4.9%	141	-6.2%	-3.4%	10.2%	371	-3.0%	-3.6%	0.1%	2565
AGE:												
16-24	-23.9%	-45.0%	-4.5%	107	-13.1%	-16.8%	1.3%	318	-1.8%	-6.2%	-9.4%	1637
25-34	8.0%	7.5%	18.4%	166	-8.5%	-3.6%	-14.0%	403	-7.6%	-8.2%	-12.2%	2447
35-44	-43.4%	-55.9%	-42.3%	114	-18.3%	-27.6%	-18.0%	386	-3.7%	-8.5%	-10.9%	2787
45-54	-30.1%	-43.4%	-36.0%	118	-17.2%	-22.3%	-23.2%	391	-9.8%	-11.6%	-5.7%	2416
55+	-11.8%	-13.2%	-2.1%	270	-1.1%	-2.7%	6.4%	726	1.4%	0.0%	1.8%	4719
SEG:												
AB	-30.1%	-33.1%	-26.1%	254	-11.6%	-12.3%	-11.9%	790	-4.5%	-7.0%	-6.8%	4807
C1	-12.1%	-27.7%	-2.6%	245	-8.5%	-15.3%	-10.2%	721	-0.1%	-3.9%	-3.8%	4321
C2	11.0%	-14.3%	-5.0%	144	-5.6%	0.4%	6.4%	357	-5.1%	-4.5%	-5.6%	2490
DE	-37.4%	-43.7%	-37.2%	134	-21.1%	-29.4%	-27.5%	356	-10.1%	-9.6%	-9.5%	2364
CHILDREN IN HH:												
Any	-32.2%	-43.7%	-39.5%	212	-17.8%	-18.6%	-29.2%	666	-6.4%	-8.2%	-14.1%	4889
None	-16.8%	-25.9%	-10.8%	557	-8.1%	-11.7%	-3.5%	1556	-2.8%	-4.9%	-2.6%	9118
ACCOMMODATION:												
Commercial accom	-25.2%	-34.3%	-15.3%	423	-11.9%	-13.1%	-8.1%	1255	-4.2%	-7.5%	-5.2%	8200
- Serviced accom	-19.5%	-14.8%	-8.6%	346	-12.8%	-9.8%	-8.4%	1038	-4.0%	-5.1%	-3.0%	5697
- Hotel/motel/guesthouse	-16.6%	-13.4%	-8.7%	320	-12.6%	-13.1%	-10.4%	946	-3.5%	-5.2%	-2.3%	5111
- Bed & Breakfast	-45.3%	-27.4%	-6.5%	26	-20.6%	8.8%	13.3%	81	-11.8%	-13.3%	-18.8%	541
Total self-catering rented	-41.2%	-55.1%	-37.6%	72	-5.9%							