

GB TOURISM SURVEY - May 2014

SUMMARY OF RESULTS

1. Headlines

- In May 2014, there were 11.3 million domestic overnight trips in Great Britain, +1% more than in May 2013, when there were 11.2 million trips.
- Nights fell slightly (by -1%) to 31.5 million, with expenditure up +5% compared to May last year, rising to £2.1 billion.
- Looking at England alone, trips remained flat against last year, at 9.1 million, with nights down -3% to 24.6 million. Expenditure increased by +4% against May last year, rising to £1.6 billion.
- For the year to date, trips were down in Great Britain by -3% to 40.9 million. Nights and spend were also down by -3% respectively.

2. Context

- The weather in May 2014 was largely unsettled, with some periods of dry and warm weather interspersed with lots of rain and thundery showers.

3. Trip Characteristics

- In the year to May, there was an increase in holiday and visits to friends and relatives (VFR) travel, but a decline in business trips.
- Holiday trips increased by +3% to 18.4m, with nights and spend up +1% and +6% respectively, increasing to 54.0m nights and £4.0bn in spend.
- Trips and nights on visits to friends and relatives (VFR) were also up (+2% each respectively), with spend remaining flat (0%), at £1.7bn. VFR trips for leisure purposes are driving increases (+13%), while non-holiday VFR trips have declined (-11%).
- Business trips (-17%), nights (-19%) and spend (-22%) have all declined for the year so far, though the month of May saw increased activity compared to May 2013.
- Trips in some parts of the country have increased at the expense of others, such as the East of England and Yorkshire & the Humber who have seen increases of +10% and +4% for trips respectively. However, the North East, West Midlands and the East Midlands have seen the biggest declines in trip-taking for the year-to-date, at -22%, -16% and -10% respectively.
- Those in social class AB are taking slightly more trips this year (+1%), whereas there has been a big decline in trip taking amongst social class DE (-10%). There has also been a decline in trip taking among those without children in the household (-4%), with trips among those with children remaining flat (0%).

4. Overseas Travel by UK Residents

- The number of trips taken abroad by UK residents in May increased by +8% compared to May 2013, with expenditure down -21%. In the year to date volume rose by +6% while spend fell by -14%.

5. Other Tourism Surveys

- Room occupancy in May showed a very slight increase, of +1%, rising to 72%, whilst bedspace occupancy showed a slight decrease, by -1% to 54%.
- The volume of day visits in Great Britain in the three months to May 2014 increased by +5% when compared with the same period last year, rising from 379 million to 399 million. The value of those visits increased at a similar rate during the same period, up from £12.9 billion to £13.5 billion (an increase of +4%).

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
May '14									
GB	11.2	11.3	+1%	31.9	31.5	-1%	2,008	2,100	+5%
England	9.1	9.1	0%	25.4	24.6	-3%	1,590	1,645	+4%
Jan-May '14									
GB	42.1	40.9	-3%	113.4	110.4	-3%	7,590	7,367	-3%
England	35.0	33.4	-5%	90.6	86.8	-4%	6,175	5,887	-5%

Purpose of Trip – May 2014

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
GB									
Holiday	5.7	5.8	+2%	19.0	18.6	-2%	1,229	1,279	+4%
Business	1.4	1.4	+2%	2.8	3.0	+5%	321	336	+5%
VFR	3.7	3.7	+2%	9.1	9.2	+2%	410	415	+1%
England									
Holiday	4.5	4.5	-1%	14.6	14.0	-4%	927	970	+5%
Business	1.2	1.2	+3%	2.3	2.5	+11%	268	284	+6%
VFR	3.1	3.1	+2%	7.6	7.6	0%	352	326	-7%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	17.9	18.4	+3%	53.7	54.0	+1%	3,773	4,015	+6%
Business	7.2	6.0	-17%	16.7	13.5	-19%	1,851	1,436	-22%
VFR	15.2	15.5	+2%	38.7	39.4	+2%	1,693	1,693	0%
England									
Holiday	14.2	14.2	0%	40.9	40.5	-1%	2,938	3,101	+6%
Business	6.2	5.1	-19%	13.4	10.9	-19%	1,556	1,192	-23%
VFR	13.0	13.3	+2%	32.6	32.3	-1%	1,436	1,391	-3%

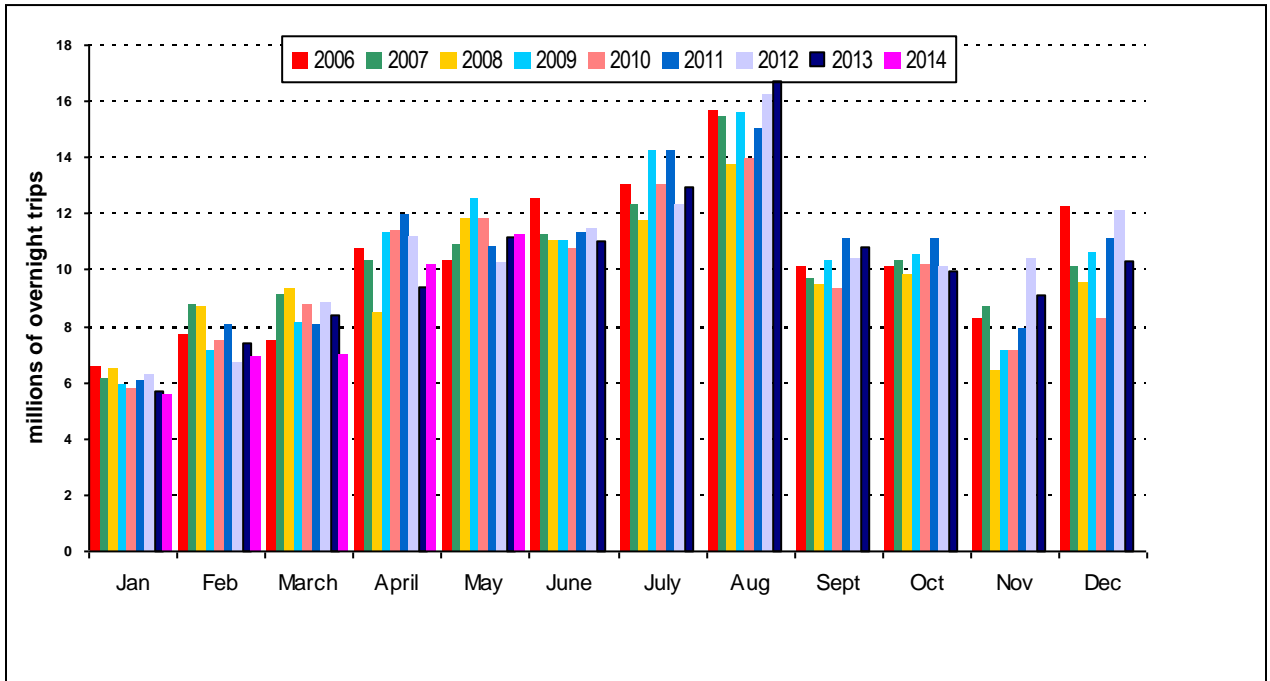
Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2013	2014	% +/-	2013	2014	% +/-
May 2014	5.1	5.5	+8%	3.0	2.4	-21%
Jan '14 – May '14	20.2	21.3	+6%	11.9	10.2	-14%
Jun '13 – May '14	56.9	59.7	+5%	33.1	33.3	+1%

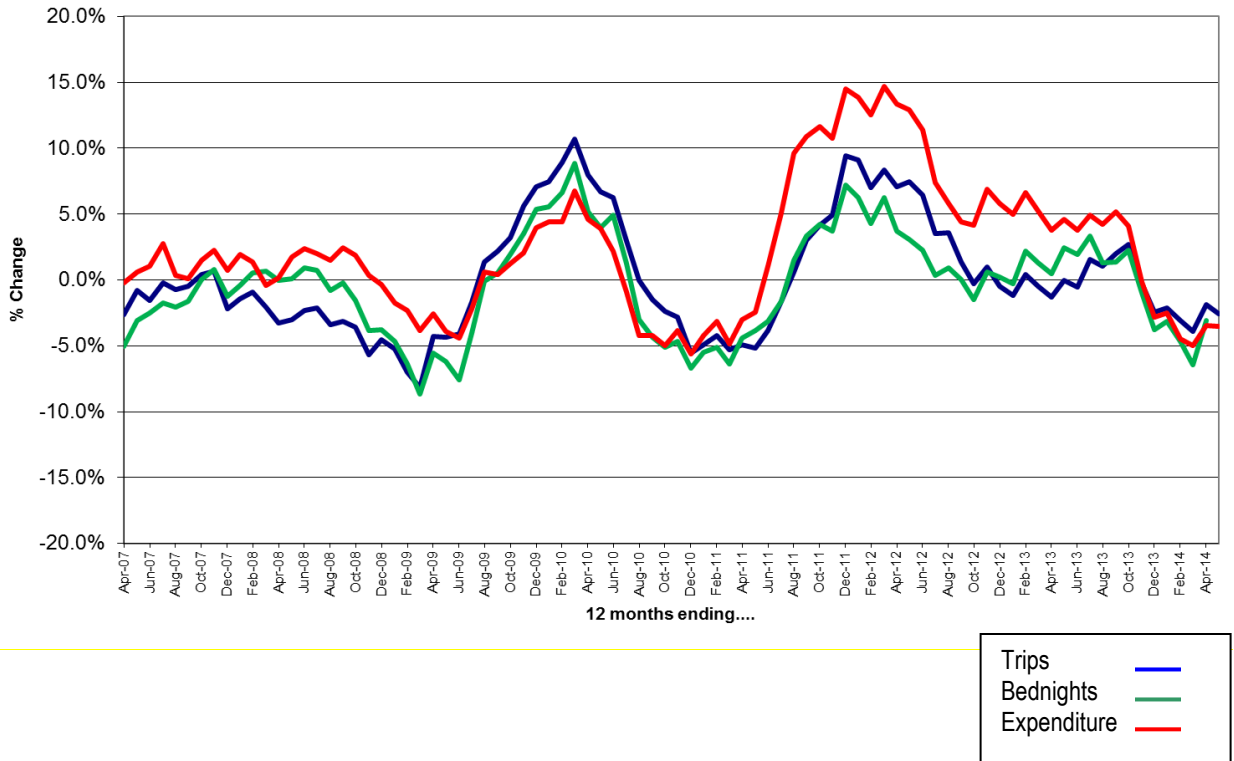
TREND CHARTS



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 (May 2013 vs. May 2014)
- Year to date (Jan-May 2013 vs. Jan-May 2014)
- 12 month rolling (June-May 2013 vs. June-May 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.

