

GB TOURISM SURVEY – September 2014

SUMMARY OF RESULTS

1. Headlines

- In September 2014, there were 9.5 million domestic overnight trips in Great Britain, down by -12% on September 2013, when there were 10.8 million trips.
- Bednights and expenditure also fell, with nights down -17% to 27.6 million, and expenditure down -8% to £2.1 billion.
- Looking at England alone, trips were down compared to September last year, at 7.7 million (-13%). Nights and expenditure were also down, by -19% and -10% respectively.
- In the year to date, trips in Great Britain were down by -7% to 86.8 million. Nights and spend were also down, by -8% and -4% respectively.

2. Context

- The weather in September was above average with low rainfall.

3. Trip Characteristics – January - September 2014

- In the year to September, holiday trips in Great Britain declined by -5% to 43.6m, with nights down -7%. However, expenditure has remained broadly flat at -1%. This decline is being driven largely by a decline in longer breaks of 4+ nights.
- Visits to friends and relatives (VFR) trips were down -6% for both trips and nights, with spend flat at -1%. However, VFR trips for leisure purposes are actually up slightly for the year (+3%), compared to -18% for non-leisure VFR.
- Business trips (-11%), nights (-10%) and spend (-13%) have all declined for the year so far.
- Looking at trip taking by different social groups, the biggest declines for the year-to-date have been within the 35-44 year age group (-12%), among social class DE (-13%), and among those with no children in the household (-8%).
- There have also been declines to all destination types, with trips to small towns faring worst (-10%), and trips to the seaside faring best at -1%.

4. Overseas Travel by UK Residents

- The number of trips taken abroad by UK residents in September was down compared to last September (-2%), with spend up by +2%. In the year to date, trips were up +3%, with spend up +3%.

5. Other Tourism Surveys

- Room occupancy in September showed an increase of +2%, rising to 79%, with bedspace occupancy up +1% to 58%.
- The volume of day visits in Great Britain in the three months to September 2014 decreased by -1% when compared with the same period last year, falling from 454 million to 451 million. The value of those visits rose during the same period, to £15.8 billion (up +3% from £15.4 billion).
- The September Tourism Business Monitor reported a strong summer period, with both attractions and accommodation businesses reporting increases in visitors against the same period the year before.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
September '14									
GB	10.8	9.5	-12%	33.3	27.6	-17%	2,258	2,077	-8%
England	8.9	7.7	-13%	26.2	21.3	-19%	1,791	1,610	-10%
Jan-Sept '14									
GB	93.5	86.8	-7%	293.0	271.1	-8%	18,329	17,677	-4%
England	76.7	70.4	-8%	230.2	209.7	-9%	14,658	14,002	-5%

Purpose of Trip – September 2014

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2013	2014	% +/-	2013	2014	% +/-	2013	2014	% +/-
GB									
Holiday	5.2	4.6	-13%	18.9	15.5	-18%	1,342	1,254	-7%
Business	1.8	1.5	-16%	4.5	3.4	-24%	461	367	-20%
VFR	3.3	3.1	-7%	8.6	8.1	-6%	389	401	+3%
England									
Holiday	4.1	3.5	-14%	14.3	11.4	-20%	1,015	943	-7%
Business	1.4	1.2	-14%	3.3	2.8	-15%	390	300	-23%
VFR	2.9	2.7	-10%	7.5	6.5	-13%	333	313	-6%

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

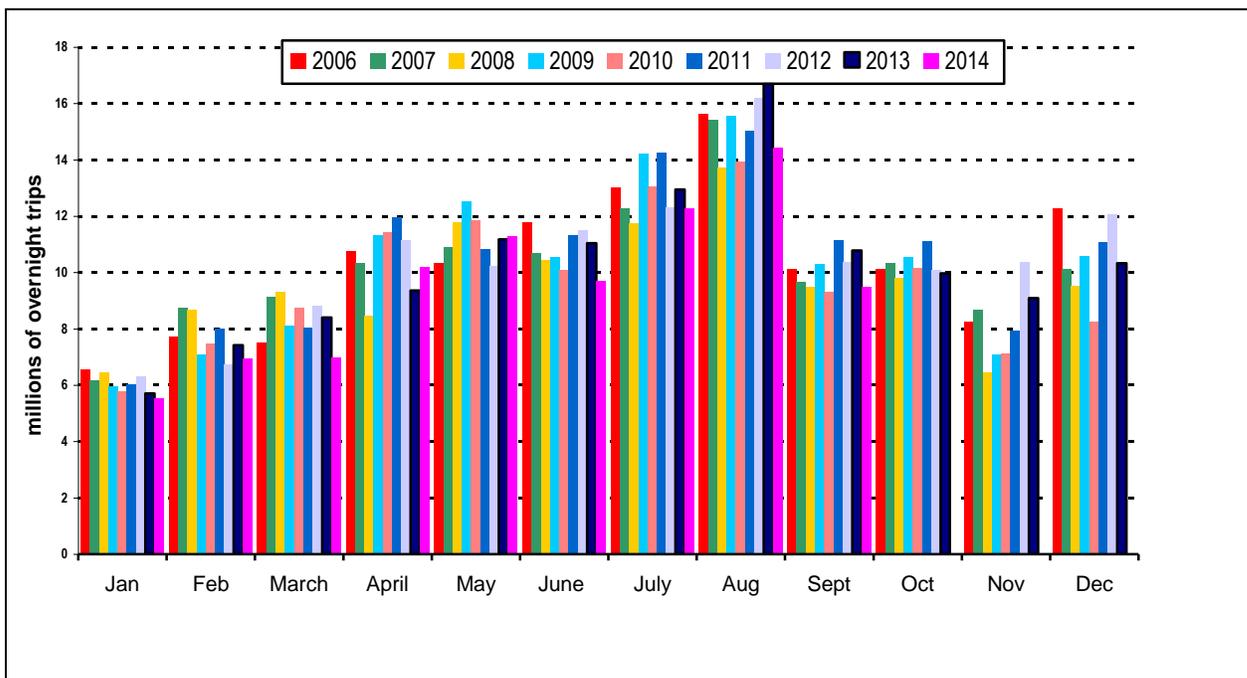
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2012	2013	% +/-	2012	2013	% +/-	2012	2013	% +/-
GB									
Holiday	45.1	43.6	-5%	168.3	156.2	-7%	10,877	10,784	-1%
Business	13.5	12.0	-11%	31.4	28.3	-10%	3,397	2,969	-13%
VFR	30.7	28.8	-6%	84.2	79.4	-6%	3,528	3,484	-1%
England									
Holiday	36.2	33.6	-7%	126.1	115.2	-9%	8,406	8,218	-2%
Business	11.4	10.2	-11%	25.3	23.2	-8%	2,850	2,524	-11%
VFR	26.2	24.7	-6%	70.8	65.5	-8%	2,939	2,860	-3%

Outbound Travel – UK Residents

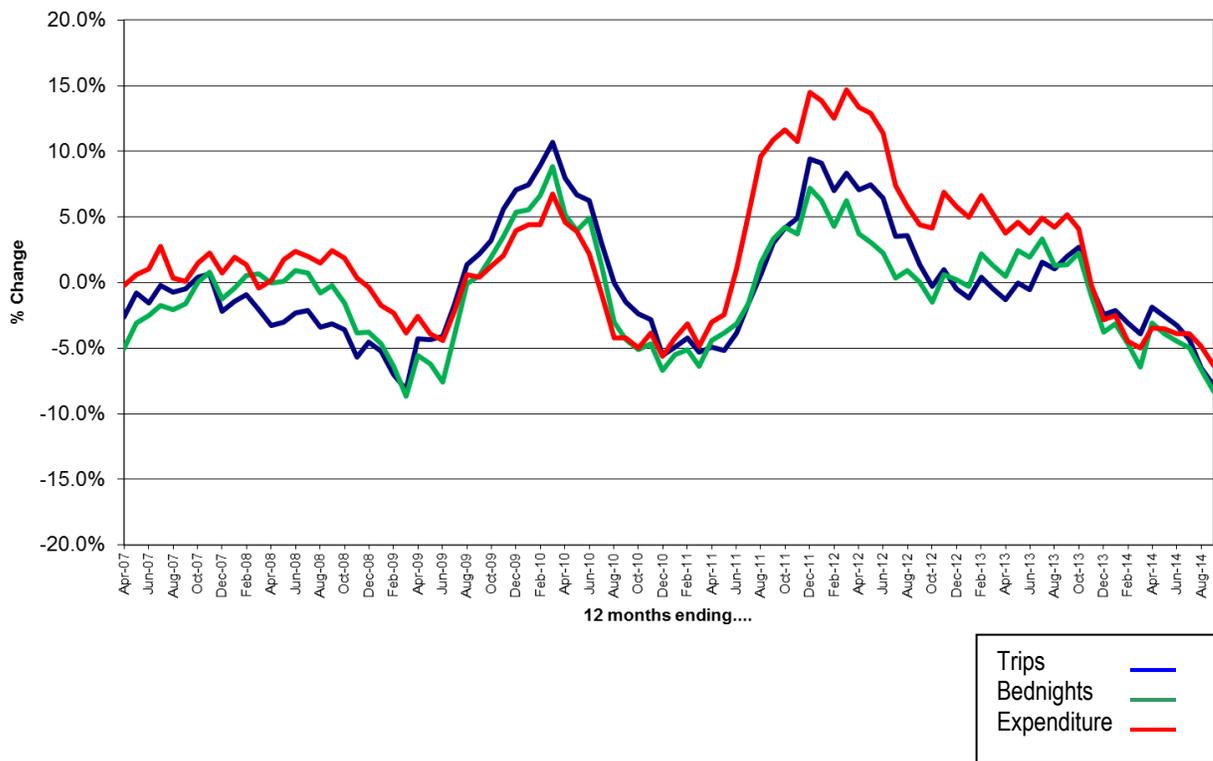
	TRIPS (MILLIONS)			SPEND (£BN)		
	2013	2014	% +/-	2013	2014	% +/-
September 2014	6.5	6.4	-2%	4.0	4.1	+2%
Jan '14 – Sept '14	46.5	47.8	+3%	28.0	28.7	+3%
Oct '13 – Sept '14	58.0	59.9	+3%	34.2	35.6	+4%

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 (September 2013 vs. September 2014)
- Year to date (Jan-Sept 2013 vs. Jan-Sept 2014)
- 12 month rolling (Oct-Sept 2013 vs. Oct-Sept 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 Average Performance Below Average Performance

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											
	Month: Sep 2014			Unweighted Trips	YTD: January - Sep 2014			Unweighted Trips	12 month rolling Oct 2013 - Sep 2014			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-12.0%	-17.1%	-8.0%	1297	-7.2%	-7.5%	-3.6%	12115	-7.8%	-8.1%	-6.3%	15844
PURPOSE:												
Pure Holiday	-12.6%	-18.1%	-6.6%	648	-5.3%	-7.2%	-0.9%	6331	-4.7%	-6.6%	-1.8%	7730
- 1-3 nights holiday	-5.9%	-5.9%	-0.8%	422	-4.1%	-2.2%	0.4%	3861	-3.8%	-2.3%	-1.0%	4869
- 4+ nights holiday	-23.8%	-24.4%	-12.1%	226	-7.2%	-9.6%	-2.0%	2470	-6.2%	-9.0%	-2.7%	2861
VFR (on holiday)	17.1%	17.9%	27.5%	261	3.1%	1.6%	5.8%	2594	0.4%	-1.2%	-1.2%	3733
HOLIDAY (TOTAL)	-5.8%	-11.4%	-2.2%	909	-3.0%	-5.1%	0.2%	8925	-3.1%	-5.0%	-1.7%	11463
VFR (non-holiday)	-26.9%	-29.6%	-21.8%	175	-17.9%	-17.6%	-11.6%	1553	-17.5%	-16.0%	-19.0%	2228
VFR (TOTAL)	-6.5%	-6.0%	3.1%	436	-6.1%	-5.7%	-1.2%	4147	-7.2%	-6.7%	-8.4%	5960
Business	-15.6%	-24.3%	-20.4%	170	-10.7%	-10.1%	-12.6%	1326	-13.3%	-14.4%	-14.0%	1764
Regions:												
West Midlands	-23.3%	-4.9%	-21.9%	84	-22.8%	-22.9%	-17.9%	700	-17.3%	-17.5%	-15.7%	984
East of England	6.5%	22.8%	-10.1%	108	2.9%	13.5%	19.9%	975	-3.4%	8.5%	9.8%	1267
East Midlands	-26.3%	-32.7%	-22.4%	70	-11.1%	-6.4%	-2.3%	755	-12.1%	-8.2%	-9.9%	998
London	22.1%	33.7%	57.1%	143	-4.9%	-8.4%	5.5%	1123	-6.1%	-8.3%	-1.0%	1511
North West	-27.1%	-30.3%	-15.4%	144	-5.9%	-0.9%	0.9%	1377	-5.1%	-2.2%	-2.2%	1831
North East	11.6%	13.0%	34.9%	41	-11.4%	-11.1%	-23.2%	367	-12.3%	-12.0%	-24.0%	475
South East	-7.1%	-20.3%	-21.6%	186	-12.0%	-15.4%	-12.4%	1678	-10.8%	-14.0%	-16.7%	2264
South West	-23.2%	-40.8%	-35.8%	197	-9.6%	-14.9%	-8.1%	1908	-7.3%	-12.6%	-6.1%	2479
Yorkshire & the Humber	-10.8%	-15.6%	12.1%	105	-1.3%	-3.3%	-6.3%	1075	-5.0%	-7.6%	-9.8%	1381
LOCATION TYPE:												
Seaside	-8.9%	-19.4%	-11.6%	317	-1.4%	-1.6%	1.1%	2874	-1.8%	-2.2%	-2.6%	3469
Large city/ large town	-10.4%	-15.1%	5.1%	495	-6.6%	-7.5%	-4.0%	4577	-6.6%	-7.2%	-6.3%	6231
Small town	-19.8%	-33.9%	-37.6%	272	-10.3%	-14.0%	-8.9%	2688	-12.0%	-14.6%	-12.5%	3606
Countryside/ village	0.5%	4.8%	10.4%	255	-7.7%	-7.7%	-1.3%	2335	-8.8%	-9.1%	-2.4%	2970
AGE:												
16-24	-6.0%	-24.3%	20.1%	145	-11.1%	-15.9%	3.2%	1309	-10.3%	-17.0%	-1.0%	1737
25-34	-15.7%	-8.0%	-2.9%	200	-9.5%	-6.2%	-5.0%	2093	-8.8%	-5.0%	-7.5%	2735
35-44	-31.1%	-40.9%	-39.4%	185	-12.4%	-11.1%	-10.3%	2379	-11.6%	-9.5%	-13.5%	3100
45-54	-16.7%	-27.9%	-10.7%	212	-5.7%	-8.2%	-7.4%	2161	-9.1%	-11.1%	-7.9%	2807
55+	2.5%	-4.0%	3.7%	555	-1.6%	-2.7%	2.3%	4173	-2.6%	-3.8%	-1.4%	5464
SEG:												
AB	-8.0%	-9.5%	-9.0%	424	-1.1%	0.9%	-0.6%	4135	-3.0%	-0.5%	-3.8%	5401
C1	-21.3%	-29.2%	-13.0%	383	-10.6%	-10.6%	-5.1%	3713	-9.8%	-11.1%	-6.3%	4891
C2	-2.4%	1.3%	8.0%	257	-10.7%	-11.8%	-3.1%	2123	-12.3%	-13.9%	-8.9%	2753
DE	-13.7%	-32.3%	-14.1%	232	-13.1%	-16.9%	-12.0%	2145	-11.7%	-13.6%	-12.6%	2799
CHILDREN IN HH:												
Any	-20.1%	-27.9%	-26.1%	347	-5.0%	-3.8%	-3.1%	4425	-5.8%	-3.7%	-7.3%	5697
None	-8.8%	-13.9%	-1.8%	949	-8.3%	-9.2%	-3.7%	7690	-8.8%	-10.1%	-5.9%	10146
ACCOMMODATION:												
Commercial accom	-13.1%	-15.4%	-6.4%	839	-5.8%	-5.6%	-1.7%	7703	-6.7%	-6.5%	-4.3%	9548
- Serviced accom	-9.8%	-8.4%	-0.8%	576	-5.8%	-4.2%	-3.3%	5086	-7.0%	-6.8%	-5.3%	6552
- Hotel/motel/guesthouse	-10.8%	-8.5%	-3.3%	507	-6.1%	-6.2%	-4.7%	4507	-7.4%	-8.7%	-6.1%	5846
- Bed & Breakfast	4.5%	-0.5%	18.5%	70	-6.9%	2.5%	14.9%	517	-8.0%	-1.8%	3.4%	630
Total self-catering rented	-12.6%	-18.6%	-20.7%	238	-6.0%	-7.6%	1.0%	2470	-4.6%	-5.9%	-1.4%	2815
- Camping & Caravanning (inc. owned caravans)	-11.1%	-19.6%	-24.8%	182	-6.0%	-9.8%	-4.1%	1874	-5.7%	-9.1%	-5.5%	2045
- Other self-catering rented	-21.7%	-22.9%	-17.7%	88	2.4%	-1.7%	5.5%	1039	3.0%	-0.7%	1.3%	1265
Hostels	-18.4%	-31.3%	-38.8%	8	-30.5%	-43.8%	10.8%	65	-43.0%	-48.5%	-18.8%	84
Own home/friends'/relatives'	-9.5%	-20.3%	-9.1%	445	-8.3%	-9.4%	-8.6%	4363	-8.3%	-9.5%	-12.2%	6227

	England											
	Month: Sep 2014			Unweighted Trips	YTD: January - Sep 2014			Unweighted Trips	12 month rolling Oct 2013 - Sep 2014			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-13.4%	-18.9%	-10.1%	1054	-8.2%	-8.9%	-4.5%	9832	-8.1%	-8.7%	-7.3%	13018
PURPOSE:												
Pure Holiday	-13.5%	-20.3%	-7.1%	503	-7.2%	-8.6%	-2.2%	4872	-6.4%	-7.7%	-3.5%	6000
- 1-3 nights holiday	-8.5%	-6.8%	1.3%	327	-6.5%	-3.2%	-0.2%	3023	-6.3%	-3.8%	-2.7%	3840
- 4+ nights holiday	-22.4%	-27.5%	-15.9%	176	-8.3%	-11.4%	-4.2%	1846	-6.6%	-9.9%	-4.5%	2153
VFR (on holiday)	12.8%	5.6%	14.4%	218	5.1%	0.6%	7.8%	2227	3.4%	-0.7%	0.9%	3233
HOLIDAY (TOTAL)	-7.1%	-15.0%	-3.9%	721	-3.7%	-6.2%	-0.5%	7097	-3.2%	-5.5%	-2.7%	9231
VFR (non-holiday)	-28.6%	-31.8%	-28.9%	153	-18.9%	-20.2%	-17.6%	1334	-17.5%	-15.9%	-21.6%	1937
VFR (TOTAL)	-9.8%	-13.3%	-6.0%	372	-5.7%	-7.5%	-2.7%	3560	-5.8%	-6.5%	-8.3%	5169
Business	-13.8%	-15.3%	-23.1%	140	-10.5%	-8.1%	-11.4%	1126	-12.5%	-13.3%	-13.8%	1504
Regions:												
West Midlands	-23.3%	-4.9%	-21.9%	84	-22.8%	-22.9%	-17.9%	700	-17.3%	-17.5%	-15.7%	984
East of England	6.5%	22.8%	-10.1%	108	2.9%	13.5%	19.9%	975	-3.4%	8.5%	9.8%	1267
East Midlands	-26.3%	-32.7%	-22.4%	70	-11.1%	-6.4%	-2.3%	755	-12.1%	-8.2%	-9.9%	998
London	22.1%	33.7%	57.1%	143	-4.9%	-8.4%	5.5%	1123	-6.1%	-8.3%	-1.0%	1511
North West	-27.1%	-30.3%	-15.4%	144	-5.9%	-0.9%	0.9%	1377	-5.1%	-2.2%	-2.2%	1831
North East	11.6%	13.0%	34.9%	41	-11.4%	-11.1%	-23.2%	367	-12.3%	-12.0%	-24.0%	475
South East	-7.1%	-20.3%	-21.6%	186	-12.0%	-15.4%	-12.4%	1678	-10.8%	-14.0%	-16.7%	2264
South West	-23.2%	-40.8%	-35.8%	197	-9.6%	-14.9%	-8.1%	1908	-7.3%	-12.6%	-6.1%	2479
Yorkshire & the Humber	-10.8%	-15.6%	12.1%	105	-1.3%	-3.3%	-6.3%	1075	-5.0%	-7.6%	-9.8%	1381
LOCATION TYPE:												
Seaside	-12.7%	-25.2%	-15.0%	240	-4.5%	-4.7%	-3.1%	2199	-4.8%	-4.8%	-6.5%	2677
Large city/ large town	-13.3%	-15.2%	3.1%	424	-7.6%	-8.5%	-4.7%	3949	-6.7%	-7.3%	-7.2%	5400
Small town	-15.8%	-31.2%	-38.0%	230	-10.8%	-15.3%	-7.5%	2138	-12.2%	-15.4%	-12.7%	2914
Countryside/ village	-1.4%	-0.2%	3.5%	191	-7.3%	-7.7%	-0.7%	1824	-7.2%	-7.8%	-0.8%	2365
AGE:												
16-24	-3.3%	-20.8%	32.1%	124	-14.0%	-18.0%	1.6%	1061	-12.1%	-17.9%	-4.8%	1447
25-34	-10.6%	0.4%	-1.4%	170	-9.1%	-6.0%	-6.0%	1724	-9.8%	-6.3%	-9.9%	2243
35-44	-31.4%	-39.1%	-42.6%	152	-13.7%	-13.1%	-10.9%	1920	-10.8%	-9.4%	-12.7%	2540
45-54	-23.9%	-36.0%	-17.7%	167	-6.8%	-6.3%	-8.1%	1754	-9.7%	-9.2%	-7.9%	2305
55+	0.2%	-7.8%	3.5%	440	-2.2%	-5.8%	1.6%	3371	-2.5%	-5.7%	-2.6%	4481
SEG:												
AB	-14.8%	-17.4%	-18.2%	333	-4.8%	-3.5%	-4.4%	3320	-5.4%	-3.5%	-6.8%	4420
C1	-17.9%	-26.8%	-12.6%	316	-9.7%	-10.3%	-3.5%	3071	-8.6%	-10.2%	-5.9%	4079
C2	-5.1%	-2.5%	12.0%	218	-10.3%	-12.4%	-1.0%	1721	-12.1%	-14.1%	-7.1%	2233
DE	-9.7%	-28.0%	-3.2%	191	-12.6%	-15.3%	-12.7%	1722	-10.3%	-12.0%	-13.6%	2284
CHILDREN IN HH:												
Any	-19.5%	-26.7%	-34.2%	291	-6.5%	-5.0%	-5.2%	3588	-6.7%	-3.9%	-9.1%	4668
None	-11.0%	-16.6%	-0.9%	764	-9.1%	-10.7%	-4.2%	6243	-8.8%	-10.9%	-6.6%	8348
ACCOMMODATION:												
Commercial accom	-14.1%	-18.0%	-8.2%	675	-6.9%	-6.7%	-2.4%	6175	-7.6%	-7.7%	-5.2%	7696
- Serviced accom	-10.2%	-10.3%	-5.8%	475	-6.0%	-3.2%	-3.4%	4207	-7.3%	-6.2%	-5.7%	5431
- Hotel/motel/guesthouse	-9.6%	-8.0%	-6.4%	423	-6.1%	-4.3%	-4.3%	3754	-7.6%	-7.4%	-6.0%	4867
- Bed & Breakfast	-8.4%	-14.8%	1.3%	54	-8.5%	0.2%	13.5%	410	-8.9%	-4.8%	0.6%	509
Total self-c												