

GB TOURISM SURVEY – February 2015

SUMMARY OF RESULTS

1. Headlines

- In February 2015, there were 7.8 million domestic overnight trips in Great Britain. This was a +13% increase on February 2014, when trip volumes fell back to 6.9 million.
- Bednights and expenditure were also up, with nights up by +10% to 18.4 million and spend up +13% to £1.3 billion.
- Looking at England alone, trips also increased compared to February last year, at 6.6 million (+17%). Nights and spend were both up by +13%.
- In the year to date, trips in Great Britain were up by +19% to 14.8 million. Nights and spend were also up by 18% and 21% respectively.

2. Context

- Weather in February 2015 was colder and drier than average. This compares to the weather in February 2014, which saw major winter storms and severe flooding, particularly in the South of England.

3. Trip Characteristics – January – February 2015

- In the year to February, holiday trips in Great Britain have increased by 6% compared to last year, from 4.6 million to 4.8 million. Nights and expenditure have increased further, by 11% and 12% respectively. This increase was driven by longer holidays of 4+ nights, which have increased by +32%.
- Visits to friends and relatives (VFR) trips grew by a greater extent, by 25% to 6.6 million, with nights and spend up 23% and 30% respectively.
- Business trips were also up for the year so far, by 12% to 2.5 million, and nights gaining even further by 22% to 5.8 million. Expenditure on business trips was also up, by 16%.
- Trips to all types of destinations increased in January and February, with trips particularly increasing to small towns (+30%) and the countryside / villages (+31%).
- Trip taking increased across all age and social groups, but particularly among those aged 55+ (+27%) and those in the AB social group (+29%).
- *Note: January and February trip volumes are low compared to other periods of the year, and care should be taken in interpreting trends by subgroup. Information about sample size is available on the final page of this report.*

4. Overseas Travel by UK Residents

- The number of trips taken abroad by UK residents in February was consistent with February 2014 (both 3.4 million), although expenditure on these trips was down -5%. For the year so far (January to February), trips abroad increased by +3% and expenditure was down -3%.

5. Other Tourism Surveys

- Room occupancy in February showed an increase of +2%, rising to 61%, with bedspace occupancy also up +2% to 44%.
- The volume of day visits in Great Britain in the three months to February 2015 decreased by -7% when compared with the same period last year, falling from 346 million to 323 million, with the value of these visits decreasing -2%, to £11.1 billion.
- The January Tourism Business Monitor showed a majority of attractions and accommodation providers had more visitors at Christmas / New Year in 2014 than at the same time in 2013.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2014	2015	% +/-	2014	2015	% +/-	2014	2015	% +/-
February '15									
GB	6.9	7.8	+13%	16.7	18.4	+10%	1,179	1,328	+13%
England	5.7	6.6	+17%	13.5	15.3	+13%	968	1,090	+13%
Jan-Feb '15									
GB	12.5	14.8	+19%	29.7	35.1	+18%	2,123	2,561	+21%
England	10.5	12.6	+19%	25.0	29.1	+17%	1,802	2,090	+16%

Purpose of Trip – February 2015

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2014	2015	% +/-	2014	2015	% +/-	2014	2015	% +/-
GB									
Holiday	2.8	2.8	-1%	6.5	6.8	+5%	556	589	+6%
Business	1.1	1.1	0%	2.6	2.4	-10%	311	275	-12%
VFR	2.8	3.6	+26%	7.1	8.5	+19%	273	399	+46%
England									
Holiday	2.2	2.4	+8%	5.2	5.7	+10%	442	493	+12%
Business	0.9	1.0	+14%	2.0	2.0	-1%	263	222	-16%
VFR	2.5	3.0	+21%	5.9	7.0	+18%	228	324	+42%

Purpose of Trip – Year to Date (January - February 2015)

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2014	2015	% +/-	2014	2015	% +/-	2014	2015	% +/-
GB									
Holiday	4.6	4.8	+6%	10.6	11.8	+11%	963	1,078	+12%
Business	2.2	2.5	+12%	4.7	5.8	+22%	550	639	+16%
VFR	5.3	6.6	+25%	12.8	15.7	+23%	534	692	+30%
England									
Holiday	3.7	4.0	+8%	8.7	9.3	+8%	800	861	+8%
Business	1.8	2.1	+14%	3.9	4.8	+23%	467	516	+11%
VFR	4.7	5.9	+24%	10.9	13.5	+24%	461	586	+27%

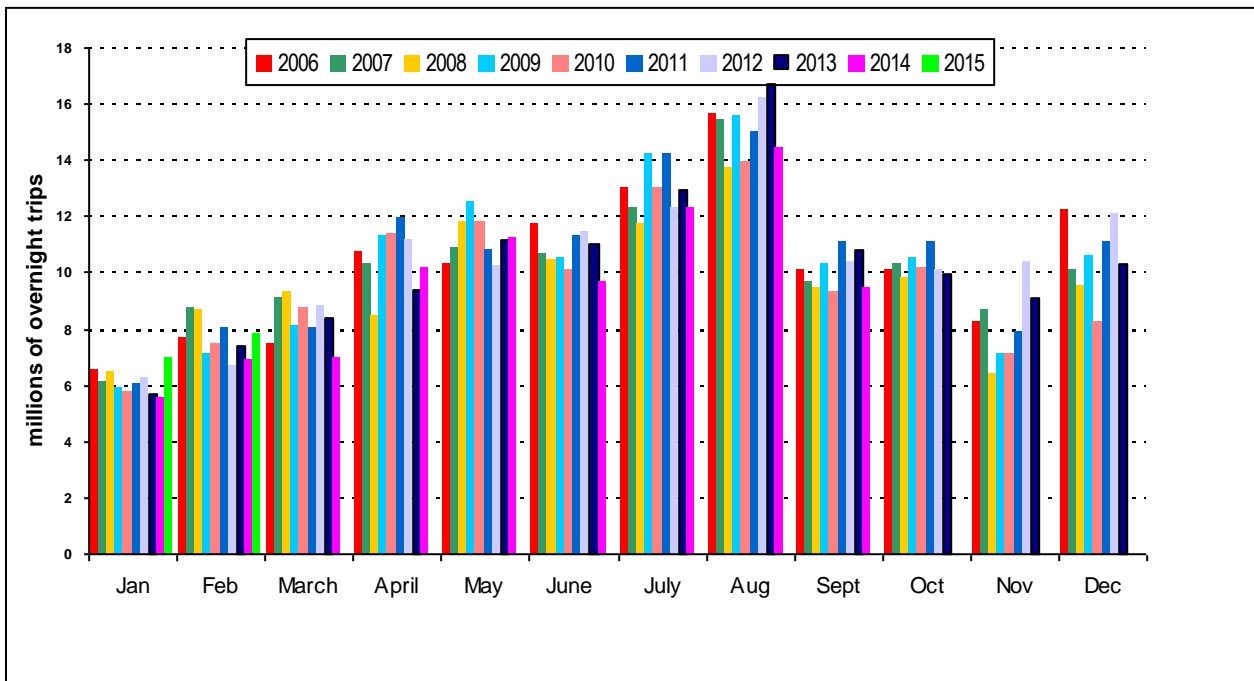
Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2014	2015	% +/-	2013	2014	% +/-
February 2015	3.4	3.4	+1%	2.1	2.0	-5%
Jan '15 – Feb '15	7.1	7.4	+3%	4.4	4.3	-3%
Mar '14 – Feb '15	58.2	60.3	+4%	35.1	35.4	+1%

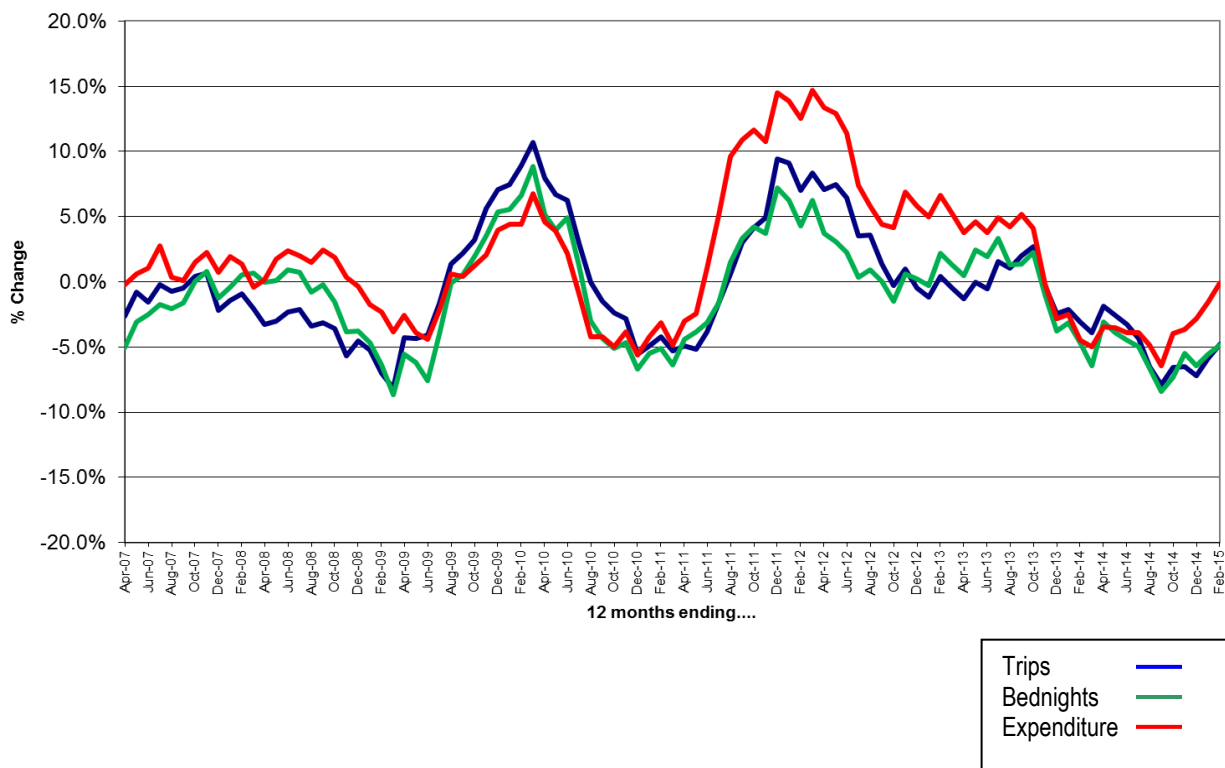
TREND CHARTS



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 (February 2014 vs. February 2015)
- Year to date (Jan-Feb 2014 vs. Jan-Feb 2015)
- 12 month rolling (Mar13-Feb14 vs. Mar14-Feb15)

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.

