







# Great Britain Tourism Survey

March 2015



# Summary of Results GB And England

	Trips	Nights	Spend	Headlines
MARCH 2015				
	+27%	+32%	+39%	<ul style="list-style-type: none"> <li>There were 8.8 million domestic overnight trips in GB in March 2015, up +27% from March 2014 when there were 7 millions trips.</li> <li>Bednights were up +32% to 23.6 million, and expenditure was up +39% to £1.8 billion</li> </ul>
	+29%	+39%	+39%	<ul style="list-style-type: none"> <li>England trips were up +29% to 7.1 million from 5.5 million in March 2014</li> <li>Bednights and expenditure were both up by +39%, to 18.4 million and £1.4 billion respectively</li> </ul>
YEAR-TO-DATE				
	+22%	+22%	+27%	<ul style="list-style-type: none"> <li>In the year January to March 2015, GB trips were up +22% to 23.6 million from 19.4 million in the same period last year. This is the highest volume of trips recorded in the survey for this period since it began in 2006.</li> <li>Nights and spend were also up, by +22% and +27% respectively</li> </ul>
	+22%	+22%	+24%	<ul style="list-style-type: none"> <li>In January to March 2015, England trips were up +22% to 19.7 million from 16.1 million in 2014. This is the highest volume of trips recorded in this period since 2008.</li> <li>Nights were also up by +22%, while expenditure increased further by +24%</li> </ul>

## Weather








## Context

- Temperatures in March 2015 were average, with below average rainfall and above average sunshine. Although March 2014 saw above average temperatures and below average rainfall, January and February 2014 saw major winter storms and flooding.
- March 2014 saw the lowest recorded trip volumes for GB and England since the survey began.

# Summary of Results England

YEAR-TO-DATE (Jan-March 2015)

## Trip Characteristics

	Trips	Nights	Spend	PURPOSE
	+12%	+14%	+11%	<ul style="list-style-type: none"> <li><b>HOLIDAY TRIPS</b> in England for the first quarter 2015 increased by +12% compared to the first quarter 2014, to 6.6 million. This is the highest volume of holiday trips recorded for the January to March period since the survey began in 2006. The increase was particularly driven by longer, 4+ night holidays (+25%).</li> <li>Nights increased by +14%, and expenditure also increased, by +11%.</li> </ul>
	+21%	+27%	+29%	<ul style="list-style-type: none"> <li><b>VISITS TO FRIENDS AND RELATIVES</b> increased by +21% to 8.4 million. Bednights and expenditure increased at a greater rate for this trip type, by +27% and +29% respectively</li> </ul>
	+32%	+35%	+32%	<ul style="list-style-type: none"> <li><b>BUSINESS</b> trips also increased for the January to March period, up by +32% to 3.6 million. Nights (+35%) and spend (+32%) also increased.</li> </ul>
	35-44yrs	Class AB	55+	TRIP TAKERS
	+34%	+33%	+28%	<ul style="list-style-type: none"> <li>Trips increased among all age groups and social grades</li> <li>The biggest increases were among those aged 35-44 (+34%), in social class AB (+33%) and among those aged 55+ (+28%)</li> </ul>
	West Midlands	Seaside		DESTINATION TYPE
	+45%	+32%		<ul style="list-style-type: none"> <li>All regions saw an increase compared to January-March 2014, with West Midlands recording the greatest increase (+45%)</li> <li>Trips increased to all destination types, with the biggest increase in trips to the seaside (+32%)</li> </ul>

# Context Other Surveys

## Overseas Travel by UK Residents

International Passenger Survey

MARCH 2015

JAN - MARCH 2015

Trip

Spend

Trip

Spend



+17%

+9%

+8%

+1%

- The number of trips taken abroad by UK residents in March 2015 was up compared to March 2014 by +17%. Expenditure increased, but not at the same pace, up by +9%
- In the year to date, trips were up +8%, with spending flat.

## Other Tourism Surveys

MARCH 15

Room

Bedspace

OCCUPANCY



-1%

0%

- Room and bedspace occupancy in England in March remained flat compared to 2014

JAN-MAR 15

Volume

Spend

DAY VISITS



-10%

-7%

- The volume of tourism day visits in England in the 3 months to March 2015 decreased by -10% to 259 million compared to the same time last year
- The value of those visits also decreased, by -7% to £9.2 billion

JUNE 15

Attractions

Accommodation

TOURISM BUSINESS MONITOR



↗

↗

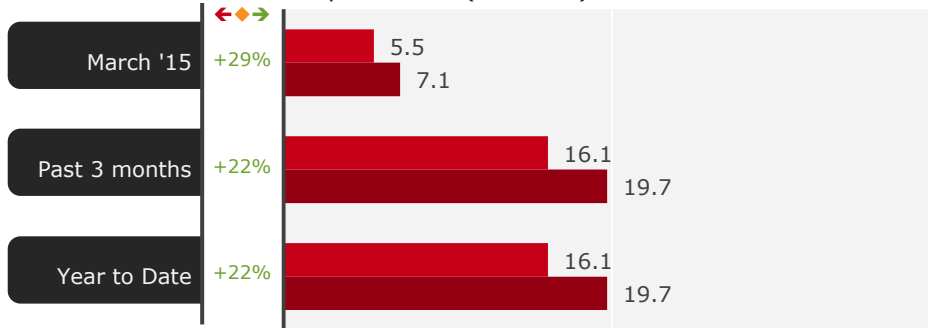
- Attractions and accommodation businesses reported an increase in visitors for the period from January until the end of May

# Headline Data GB and England

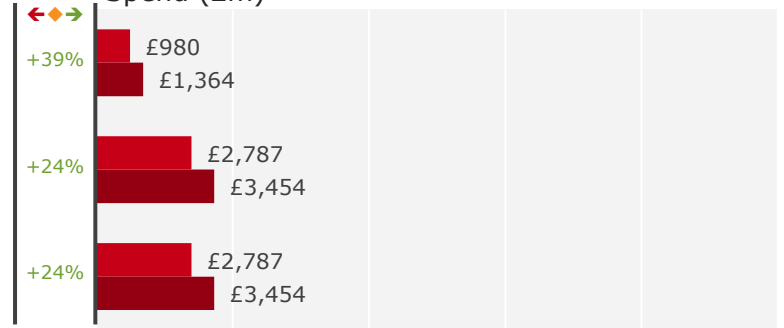
Volume and spend (2014 vs 2015)



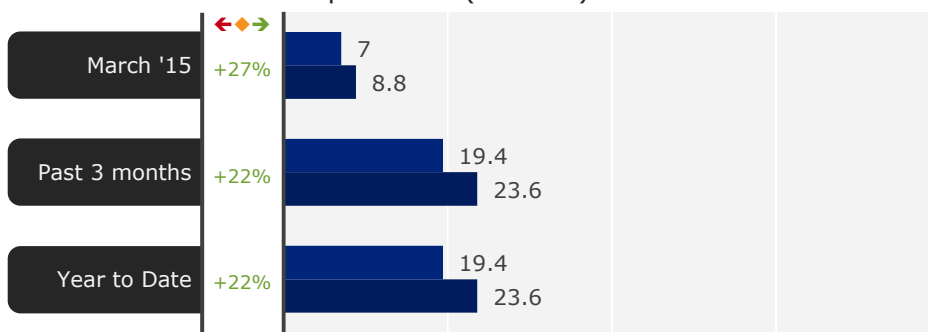
Trip Volume (millions)



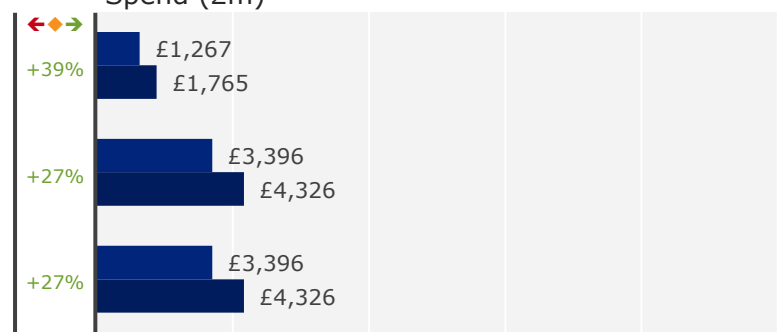
Spend (£m)



Trip Volume (millions)



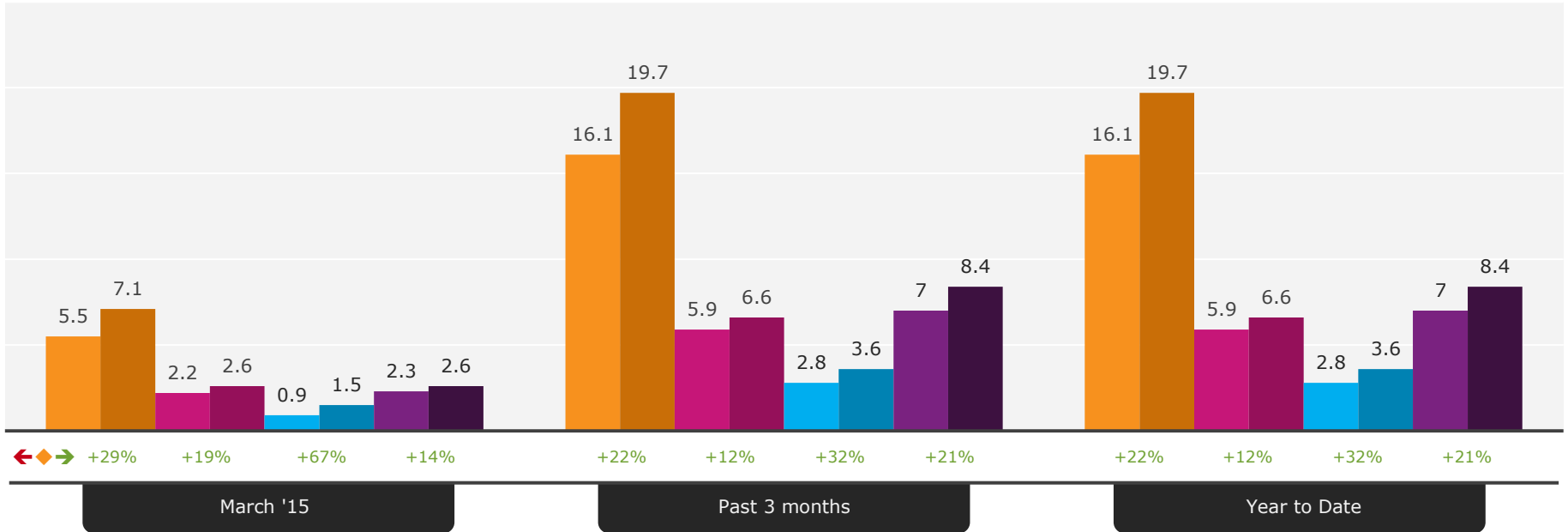
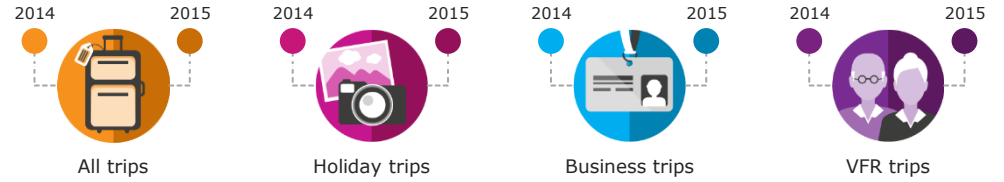
Spend (£m)



 % change vs 2014

# Trips England

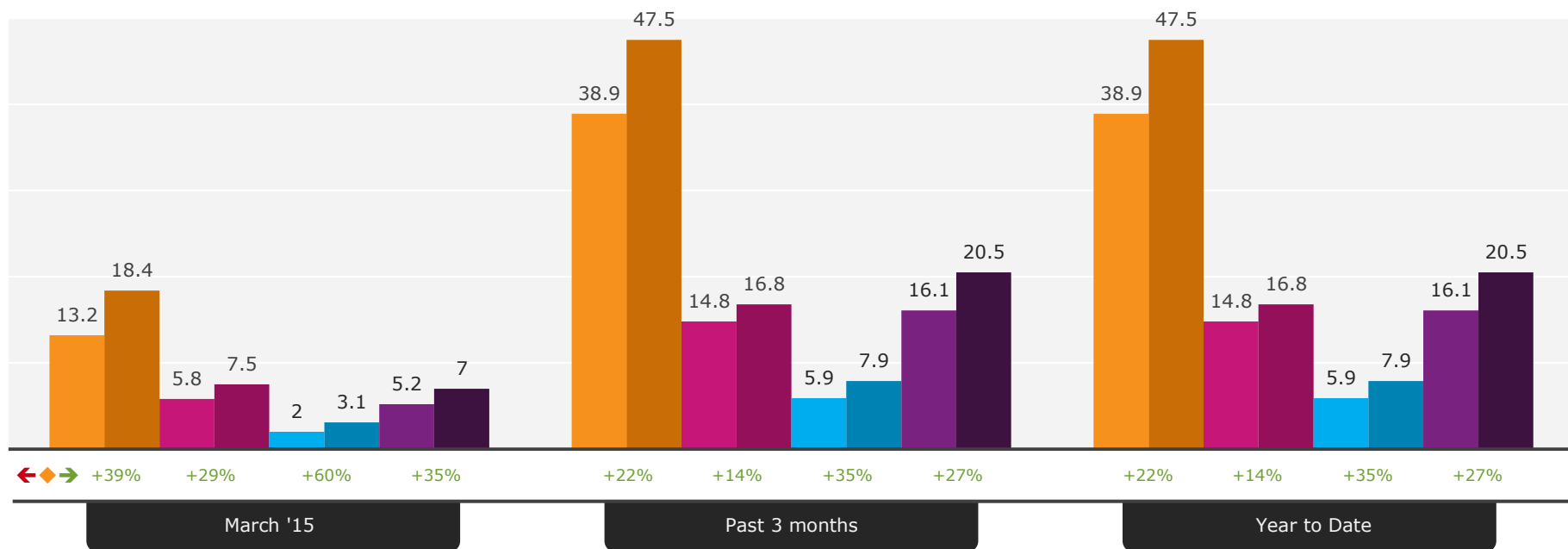
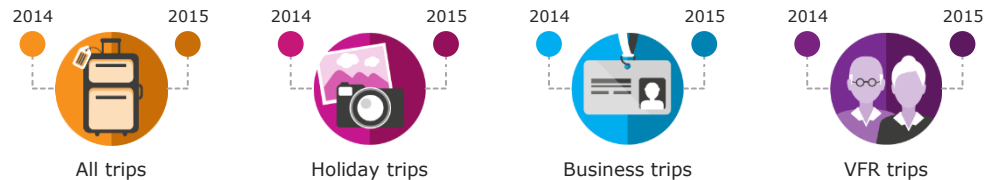
Volume of trips (millions) (2014 vs 2015)



◀▶ % change vs 2014

# Nights England

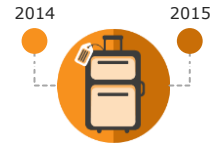
Volume of nights (millions) (2014 vs 2015)



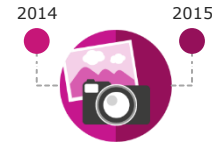
◀◆▶ % change vs 2014

# Spend England

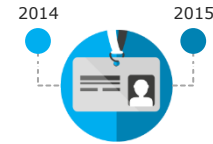
Expenditure (£m) (2014 vs 2015)



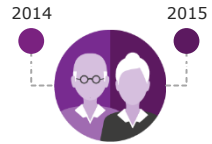
All trips



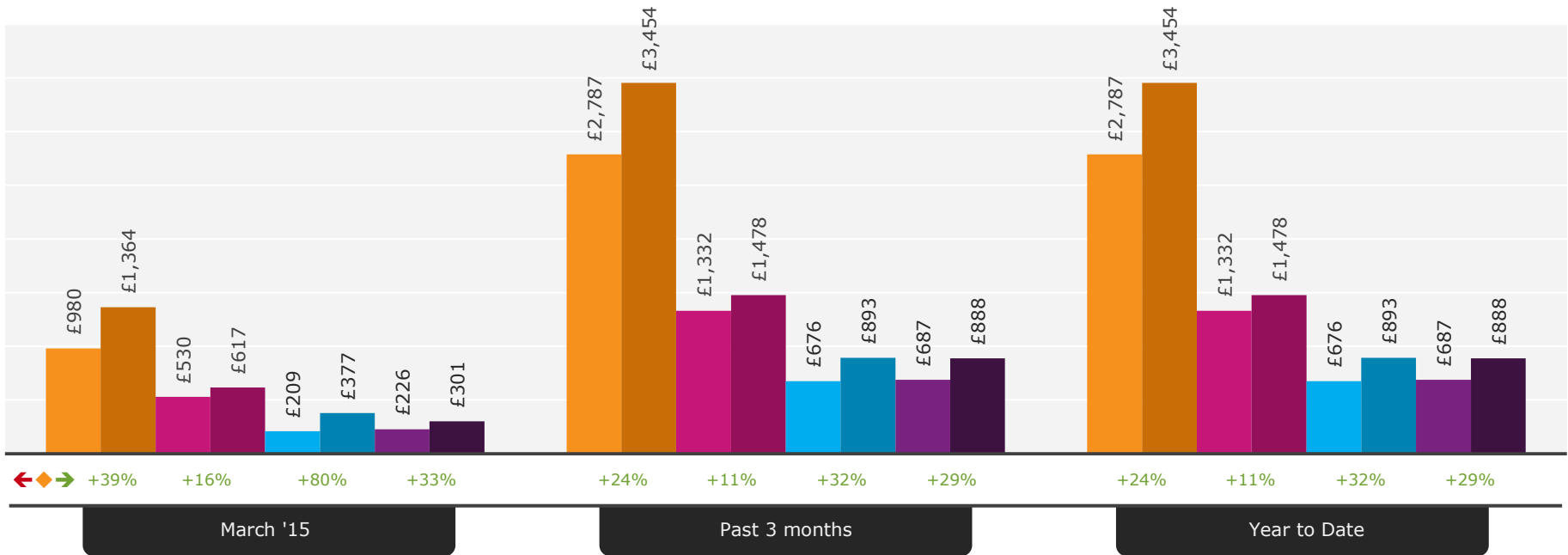
Holiday trips



Business trips



VFR trips



◀▶ % change vs 2014

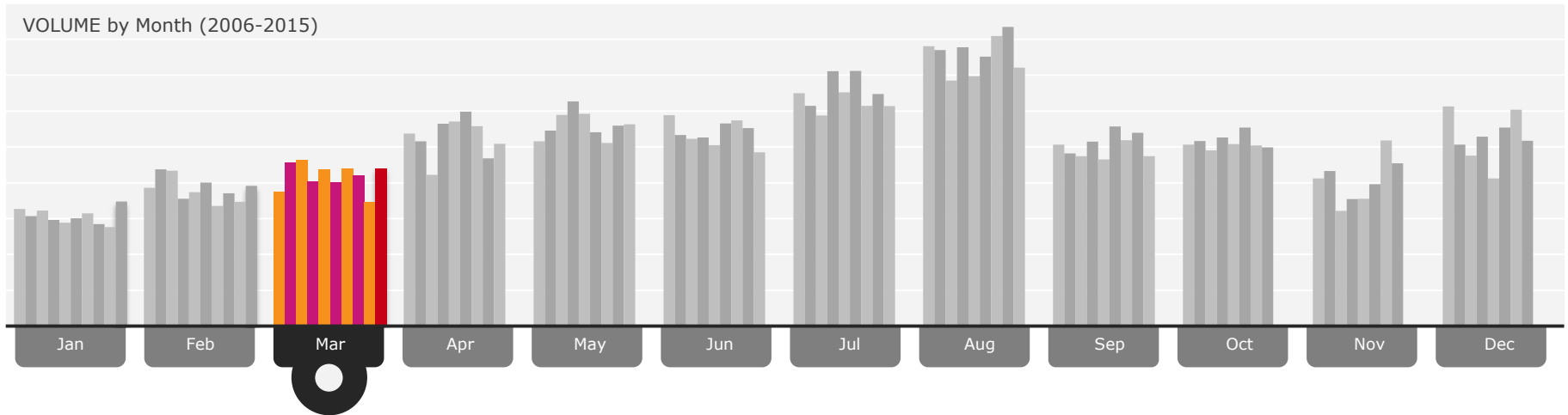


# Long Term Trends by Month GB

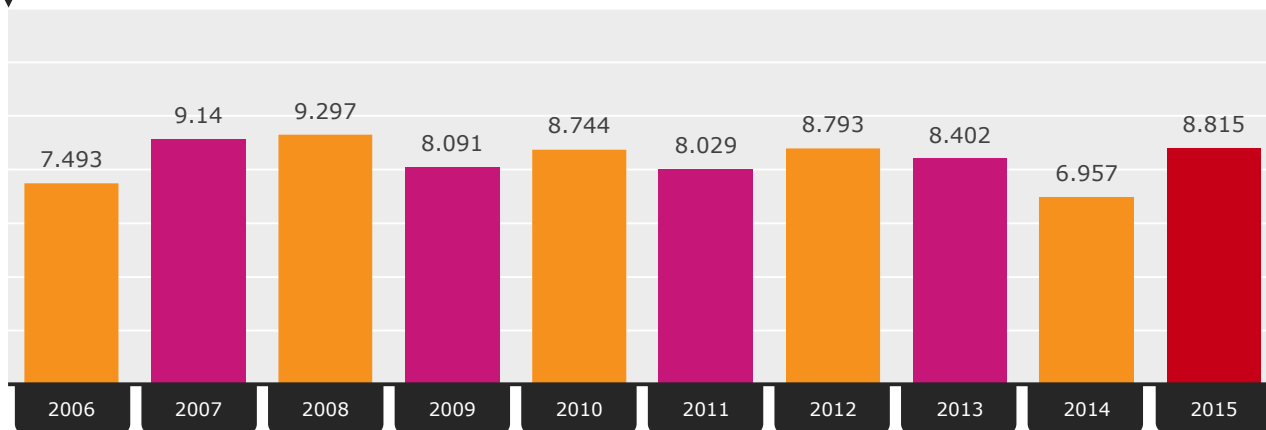
2006-2015 (millions)



VOLUME by Month (2006-2015)



VOLUME - March (2006-2015)



# Long Term Trends, Year-to-Year England



All Trips



Holiday Trips

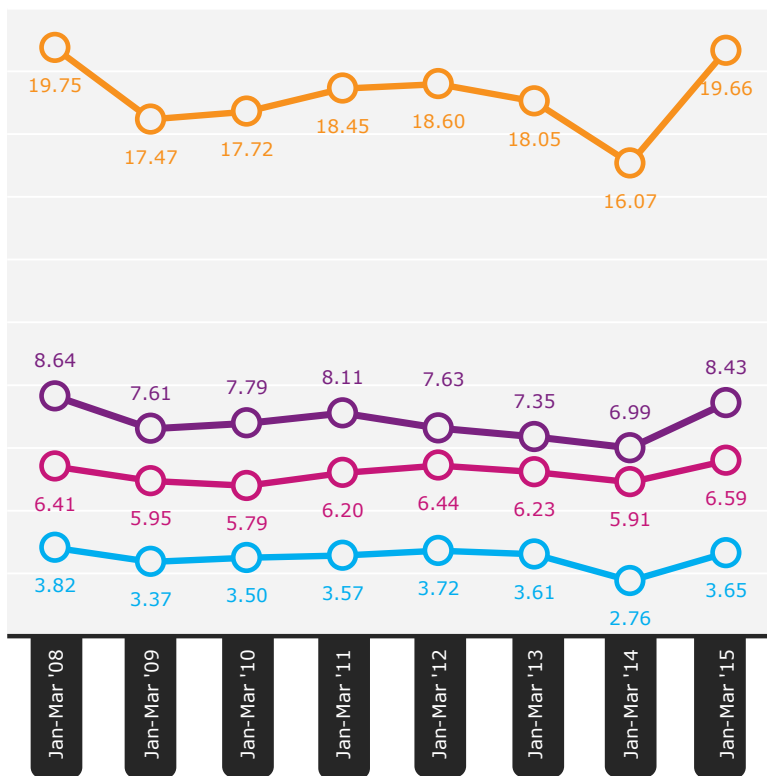


Business Trips

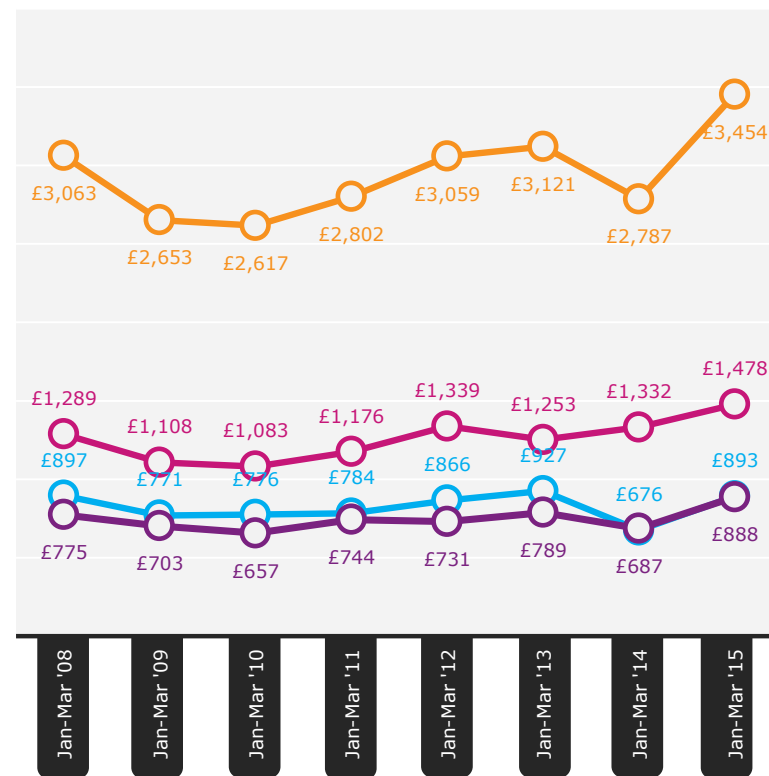


VFR Trips

Trip Volume (millions)



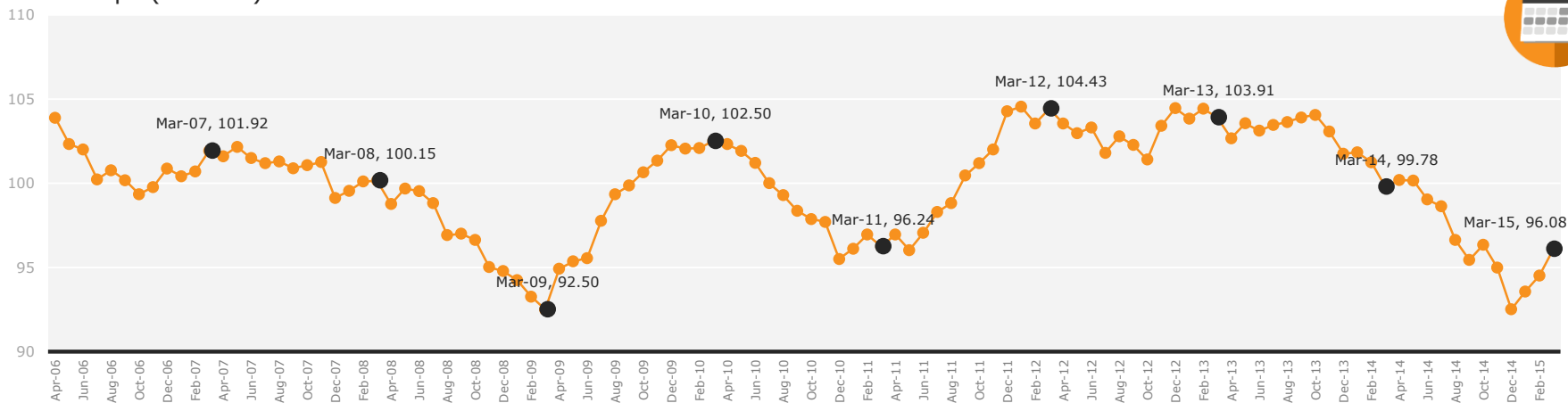
Spend (£m)



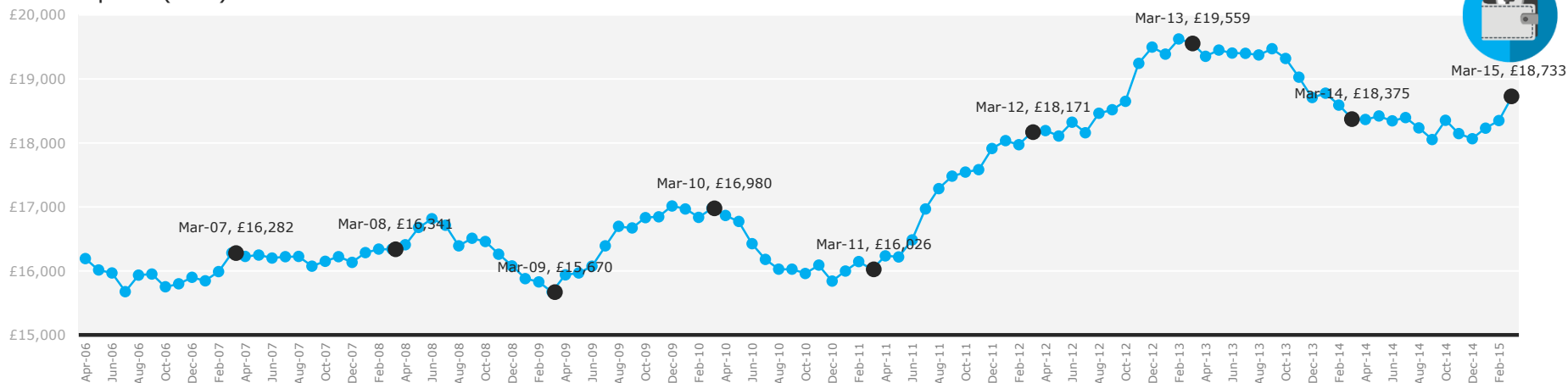
# Rolling 12 Month Trendlines England

All trips and spend

All Trips (millions)



Spend (£BN)



# Rolling 12 Month Trendlines England

Trips by purpose (millions)



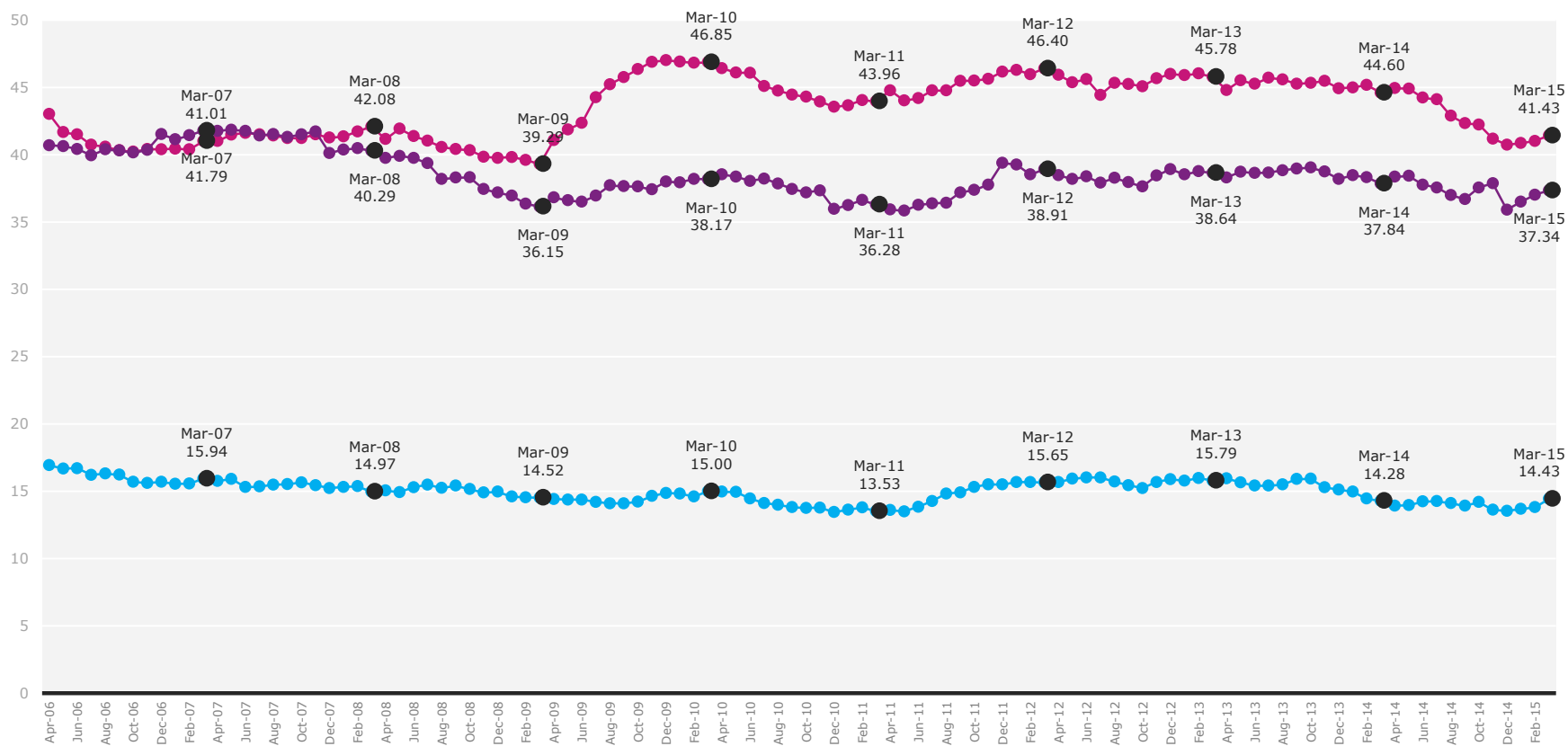
Holiday trips



Business trips



VFR trips



# Rolling 12 Month Trendlines England

Spend by purpose (£m)



Holiday trips



Business trips

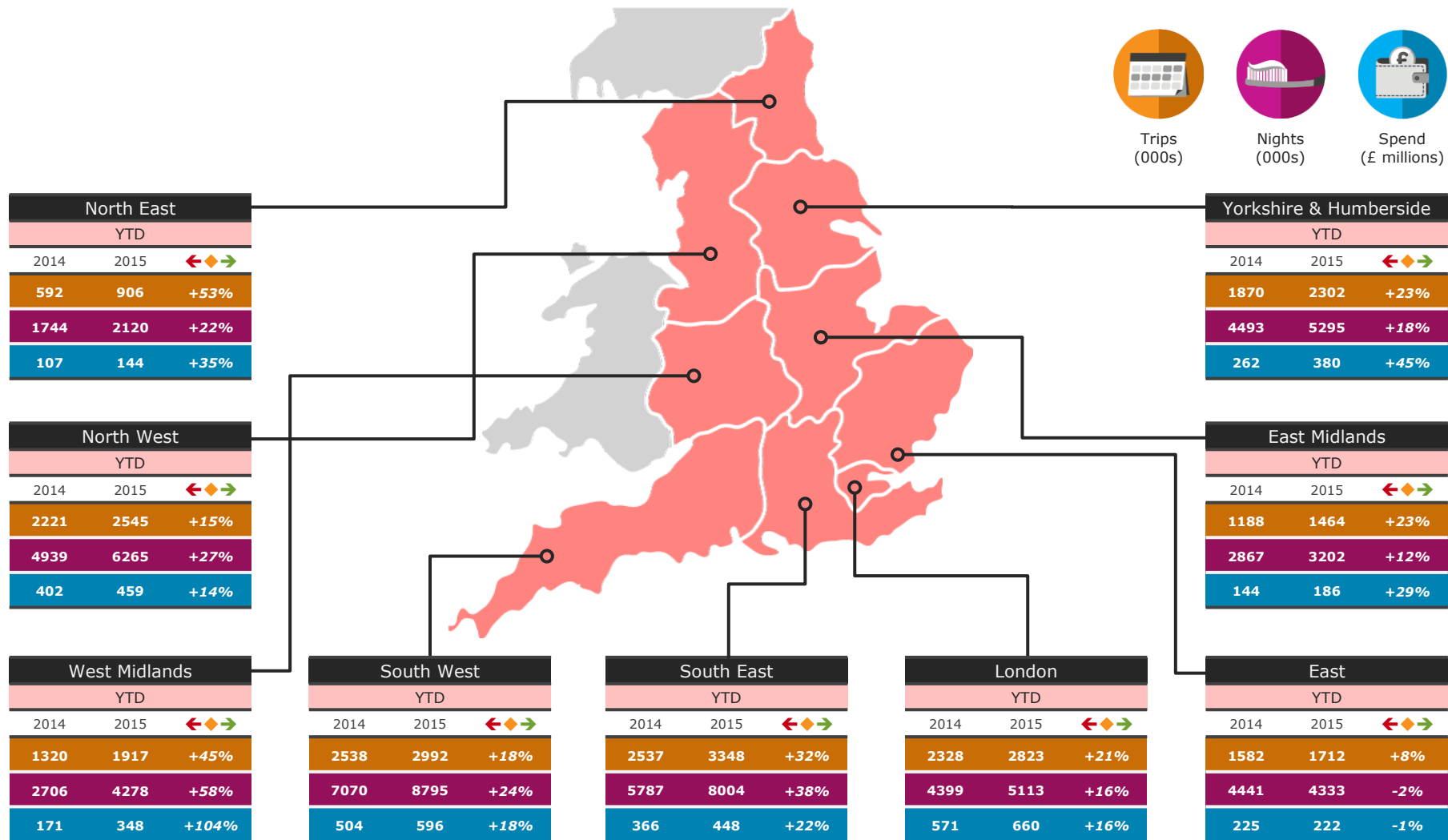


VFR trips



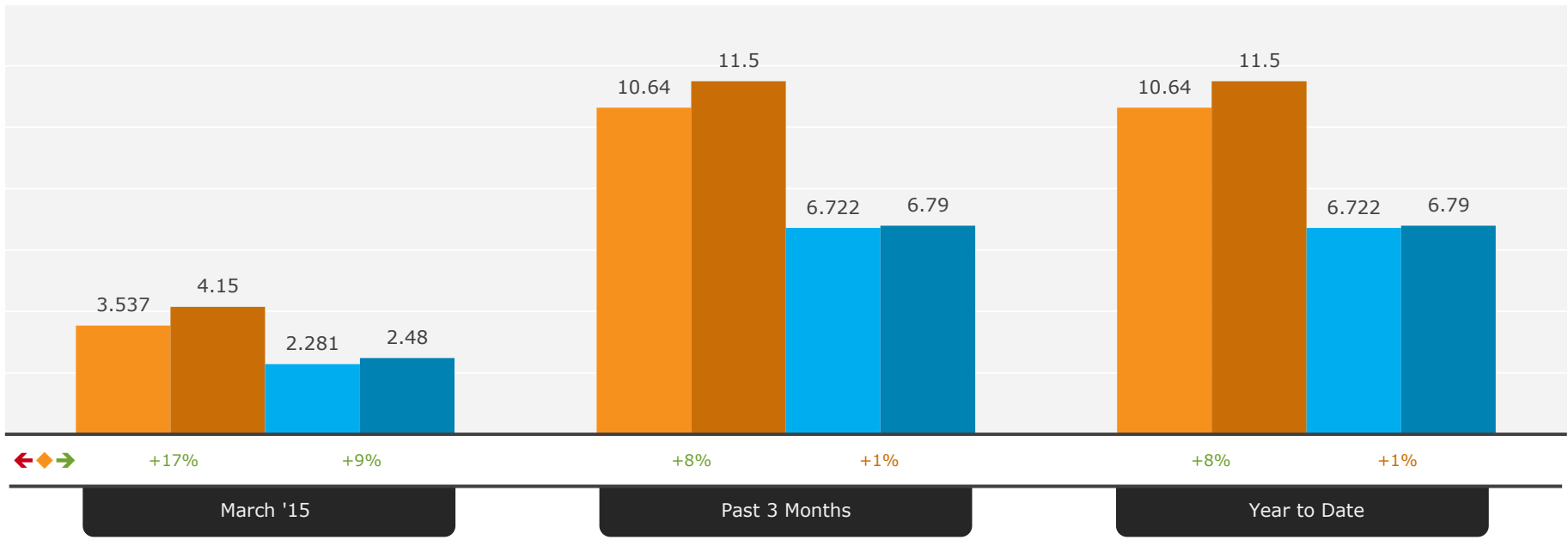
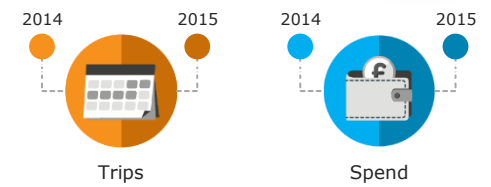
# Regional Analysis England

Trip characteristics – region (2014 vs 2015)



# UK Outbound Travel (International Passenger Survey)

Total volume (millions) and spend (£bn)



◀◆▶ % change vs 2014

# Appendix: Domestic Tourism England

Trip characteristics (Year-To-Date: Jan-Mar 2015)



## PURPOSE

		Pure Holiday	1-3 nights	+4 nights	VFR (on holiday)	Holiday (total)	VFR (non-holiday)	VFR (total)	Business
TRIPS 000s	2014	5909	4811	1097	4070	9978	2924	6994	2764
	2015	6592	5226	1367	4870	11462	3557	8427	3647
	◀◆▶	+12%	+9%	+25%	+20%	+15%	+22%	+21%	+32%
NIGHTS 000s	2014	14771	8647	6124	9670	24442	6413	16084	5854
	2015	16824	9612	7212	12651	29475	7804	20455	7913
	◀◆▶	+14%	+11%	+18%	+31%	+21%	+22%	+27%	+35%
SPEND £millions	2014	1332	1027	305	437	1769	251	687	676
	2015	1478	1031	447	561	2039	326	888	893
	◀◆▶	+11%	0%	+47%	+28%	+15%	+30%	+29%	+32%
Unwtd Trips		885	681	202	695	1578	491	1186	392

## REGION

		West Midlands	East of England	East Midlands	London	North West	North East	South East	South West	Yorkshire & the Humber
TRIPS 000s	2014	1320	1582	1188	2328	2221	592	2537	2538	1870
	2015	1917	1712	1464	2823	2545	906	3348	2992	2302
	◀◆▶	+45%	+8%	+23%	+21%	+15%	+53%	+32%	+18%	+23%
NIGHTS 000s	2014	2706	4441	2867	4399	4939	1744	5787	7070	4493
	2015	4278	4333	3202	5113	6265	2120	8004	8795	5295
	◀◆▶	+58%	-2%	+12%	+16%	+27%	+22%	+38%	+24%	+18%
SPEND £millions	2014	171	225	144	571	402	107	366	504	262
	2015	348	222	186	660	459	144	448	596	380
	◀◆▶	+104%	-1%	+29%	+16%	+14%	+35%	+22%	+18%	+45%
Unwtd Trips		248	248	197	356	331	118	429	410	300





◀◆▶ % change vs 2014












# Appendix: Domestic Tourism England



Trip characteristics (Year-To-Date: Jan-March 2015)



LOCATION TYPE					
		Seaside	Large City/Town	Small Town	Countryside /Village
TRIPS 000s	2014	1964	8008	3778	2593
	2015	2592	9868	4326	3254
	◀◆▶	+32%	+23%	+15%	+25%
NIGHTS 000s	2014	5180	16665	9259	7711
	2015	7236	20216	10436	9543
	◀◆▶	+40%	+21%	+13%	+24%
SPEND £millions	2014	368	1494	507	411
	2015	495	1843	601	509
	◀◆▶	+35%	+23%	+19%	+24%
Unwtd Trips		362	1259	579	436

SOCIAL GRADE					
		AB	C1	C2	DE
TRIPS 000s	2014	6820	5056	2448	1746
	2015	9049	5546	2862	2205
	◀◆▶	+33%	+10%	+17%	+26%
NIGHTS 000s	2014	16309	11589	6726	4283
	2015	21351	13162	6552	6447
	◀◆▶	+31%	+14%	-3%	+51%
SPEND £millions	2014	1352	848	381	206
	2015	1666	1016	466	306
	◀◆▶	+23%	+20%	+22%	+49%
Unwtd Trips		938	780	410	464

AGE						
		16-24	25-34	35-44	44-54	55+
TRIPS 000s	2014	2113	2805	3009	3245	4897
	2015	2522	2980	4019	3866	6276
	◀◆▶	+19%	+6%	+34%	+19%	+28%
NIGHTS 000s	2014	5109	6755	6372	7097	13573
	2015	6704	6839	8777	8657	16536
	◀◆▶	+31%	+1%	+38%	+22%	+22%
SPEND £millions	2014	310	447	560	634	836
	2015	406	515	652	753	1129
	◀◆▶	+31%	+15%	+16%	+19%	+35%
Unwtd Trips		337	394	481	444	930

CHILDREN IN H/H			
		Any	None
TRIPS 000s	2014	4339	11730
	2015	5518	14144
	◀◆▶	+27%	+21%
NIGHTS 000s	2014	10018	28888
	2015	12060	35452
	◀◆▶	+20%	+23%
SPEND £millions	2014	623	2163
	2015	842	2613
	◀◆▶	+35%	+21%
Unwtd Trips		794	1793

◀◆▶ % change vs 2014

# Appendix: Domestic Tourism England

Trip characteristics (Year-To-Date: Jan-March 2015)



## Accommodation



		Commercial Accommodation	(a) Serviced accom	(b) Hotel/motel/guest house	(c) Bed & Breakfast	Total self-catering rented	(a) Camping & Caravanning (inc. owned caravans)	(b) Other self-catering rented	Hostels*	Own home/friends'/ relatives'
TRIPS 000s	2014	9036	7475	6814	587	1344	560	906	86	6858
	2015	10852	8801	7949	793	1720	710	1177	190	8532
	◀◆▶	+20%	+18%	+17%	+35%	+28%	+27%	+30%	+121%	+24%
NIGHTS 000s	2014	20527	14674	12704	1503	5041	1838	3610	142	17315
	2015	24159	16260	14455	1620	6726	2345	4856	399	21189
	◀◆▶	+18%	+11%	+14%	+8%	+33%	+28%	+35%	+181%	+22%
SPEND £millions	2014	2202	1848	1680	145	310	75	250	12	548
	2015	2629	2069	1892	154	476	84	410	48	760
	◀◆▶	+19%	+12%	+13%	+6%	+54%	+12%	+64%	+300%	+39%
Unwtd Trips		1433	1162	1050	105	227	94	115	25	1127

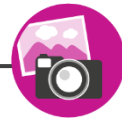
\*caution small sample size ◀◆▶ % change vs 2014

# Appendix: Domestic Tourism England

Year to date trip length, spend/night, spend/trip



All Tourism



Holidays



Business



VFR

	2010	2011	2012	2013	2014	2015	2010	2011	2012	2013	2014	2015	2010	2011	2012	2013	2014	2015	2010	2011	2012	2013	2014	2015
Trip Length	2.43	2.49	2.42	2.50	2.42	2.42	2.71	2.52	2.57	2.56	2.50	2.55	2.05	2.08	2.14	2.26	2.12	2.17	2.43	2.42	2.48	2.54	2.30	2.43
Spend Per Night	£61	£61	£68	£69	£72	£73	£69	£75	£81	£78	£90	£88	£108	£106	£109	£114	£115	£113	£35	£38	£39	£42	£43	£43
Spend Per Trip	£148	£152	£164	£173	£173	£176	£187	£190	£208	£201	£225	£224	£222	£220	£233	£257	£245	£245	£84	£92	£96	£107	£98	£105