Great Britain Tourism Survey

December 2017

VisitEngland™

Long term trends: How to compare data collected from January 2016 onwards with data collected in December 2015 and before

The introduction of a new data processing approach in January 2016 had an impact, albeit small, on the reported estimates for trips, nights and expenditure.

This change also impacted trends and the ability to conduct long-term analysis. Therefore caution should be taken when comparing data from January 2016 onwards with data in December 2015 and before. Where relevant, trend breaks have been clearly marked either with asterisk or a dotted line to indicate where users should be cautious.

As 2016 and 2017 use the same data processing approach, 2017 data can be compared to 2016 data without any concern. Similarly collected any data before December 2015 can be compared with any other data collected prior to December 2015 without any concern.

For more information please see: https://www.visitbritain.org/about-gbts-and-gbdvs

Summary of Results GB And England

	Trips	Nights	Spend	Headlines
December 2017				
	+5%	+12%	+3%	• There were 10.8 million domestic overnight trips in GB in December 2017, which is up from 10.4 million trips in December 2016. • Expenditure increased by +3% to £1.7 billion, while the number of nights increased by +12% to 35.0 million.
	+6%	+15%	+11%	• There were 9.3 million domestic overnight trips to England in December 2017, up by +6% on the same month last year. • Spend increased by +11% to £1.4 billion, while bednights increased by +15% to 29.6 million.
YEAR-TO-DATE				
	+1%	+3%	+3%	• In the year to December 2017, GB trips were up +1% to 120.7 million, compared to 119.5 million in the same period in 2016. • Nights were up by +3% for the year-to-date at 369.5 million, while spend increased for the year to date by +3% at £23.7 billion.
	+1%	+4%	+3%	• In the year to December 2017, trips to England increased by +1% to 100.6 million, compared to 99.3 million in the same period in 2016. • Nights increased by +4% to 299.4 million, while spend increased by +3% for the year to date.

	Weather	Context
		• December was an unsettled month which started mild and cloudy before Storm Caroline arrived on the 7th bringing windy weather. From the 8th-16th there was a cold wintry spell with widespread frosts, which was followed by a mild spell for most between the 17th-25th. Towards the end of the month there were further strong winds brought by Storm Dylan.

Summary of Results England

YEAR-TO-DATE (January-December 2017)

Trip Characteristics

	Trips	Nights	Spend
	+6%	+7%	+6%
	-1%	+4%	+1%
	0%	0%	-2%

PURPOSE

- **HOLIDAY TRIPS** in England from January to December 2017 increased by +6% compared to the same period last year, with 47.2 million trips recorded.
- Expenditure increased by +6% to £11.0 billion, while nights increased by +7% to 157.8 million.
- **VISITS TO FRIENDS AND RELATIVES** decreased by -1% to 36.6 million, with bednights up by +4% and expenditure up by +1%. Non-holiday VFR trip volume decreased by -1% and holiday VFR trips decreased by -1%.
- **BUSINESS** trips remained stable for the January to December period at 14.2 million. Nights were at a similar level to in 2016, whilst spend decreased compared to the same period in 2016, by -2%.

	25-34	55+	C2
	+7%	+3%	+5%

TRIP TAKERS

- The greatest increase in trip taking amongst different age groups between Jan-Dec in England was for those aged 25-34 and 55+. Trips increased by +7% for 25-34s and by +3% for those aged 55+.
- The C2 social class group saw a +5% increase in trips taken between January to December compared to the same period in 2016. All other groups saw an increase, except ABs which stayed at a similar level.

	North West	Yorkshire & Humber	North East
	+14%	+15%	+7%

DESTINATION TYPE

- North West, Yorkshire & Humber, and North East saw the greatest increases in trips taken between January and December – trip taking increased by +14%, +15%, and +7% respectively compared to the same period in 2016.
- There was a decrease in trips to seaside and small towns but an increase to countryside / village and cities for the January to December period compared to the same time in 2016.

Context Other Surveys

Overseas Travel by UK Residents

International Passenger Survey

	December 2017		Jan – December 2017	
	Trips	Spend	Trips	Spend
	-1%	+2%	+2%	+2%

- In December, trips by Brits decreased by -1% compared to the same period in 2016, whilst expenditure on these trips increased by +2%.
- For the year to date, overseas trips were up by +2%. Expenditure also increased, by +2%.

Other Tourism Surveys

OCCUPANCY

December 17	Room	Bedspace
	-1%	+1%

- Room occupancy in England in December decreased by -1% compared to December 2016 to 71%, whilst bedspace occupancy increased by +1% to 52%.

DAY VISITS

Jan-Dec 17	Volume	Spend
	-3%	-5%

- The number of tourism day visits in England in the period January to December 2017 decreased by -3% to 1.5 billion.
- The value of those visits decreased by -5% to £50.9 billion.

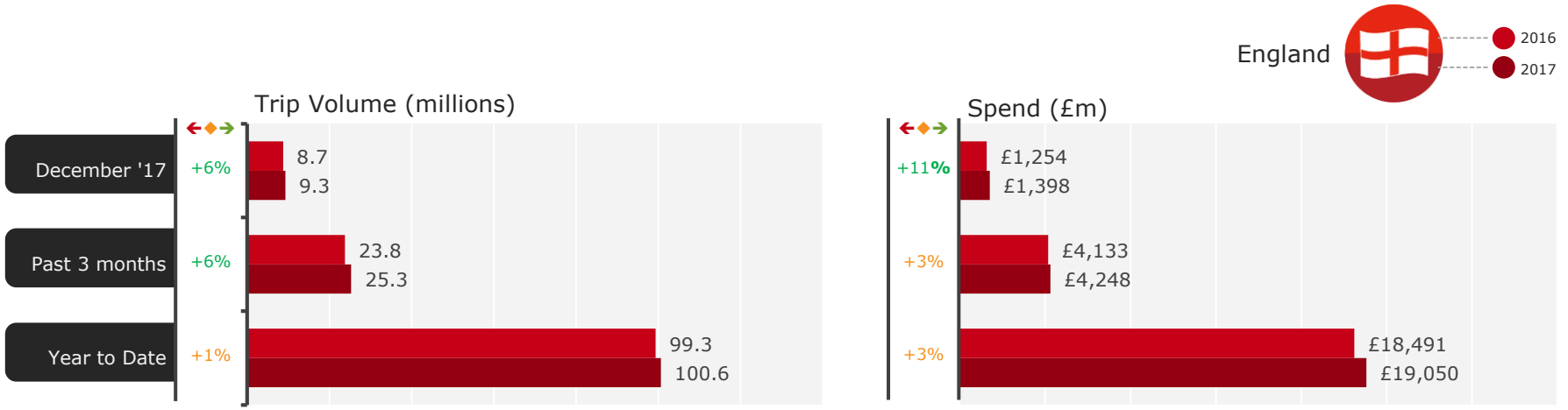
TOURISM BUSINESS MONITOR

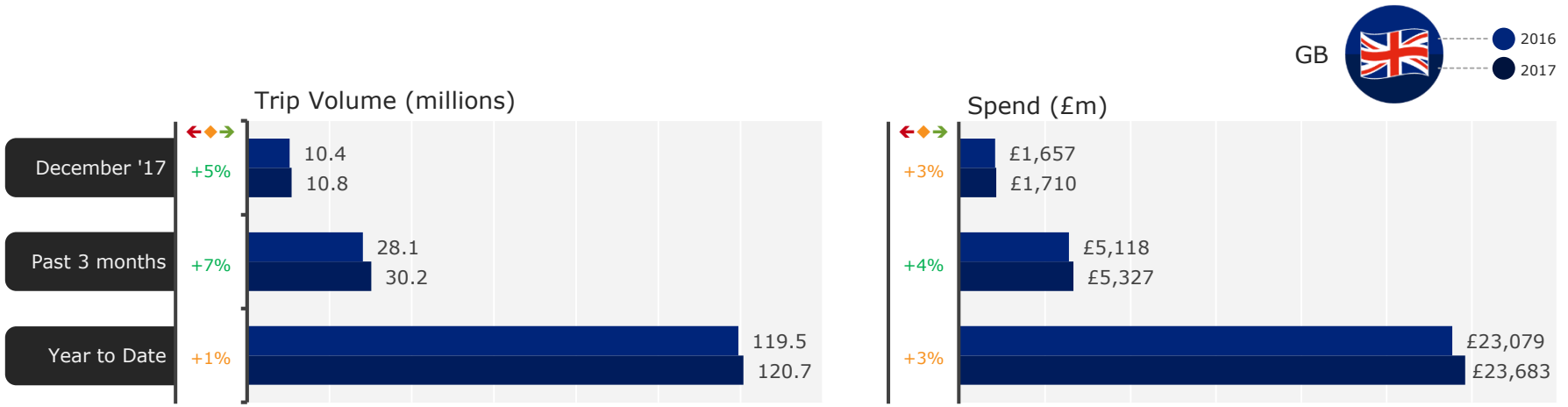
September 17	Attractions	Accommodation
	↗	↗

- Attractions and accommodation businesses reported a varied performance for the period of mid-July until the end of the Summer holidays. Slightly more attractions reported increased visitor numbers than did this time last year, but the proportion reporting a decline was also higher. 40% of accommodation business reported higher visitor numbers than during the same time in 2016. This, however, is lower than the figure observed for the year so far.

Headline Data GB and England

Volume and spend (2016 vs 2017)



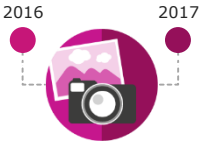


% change vs 2016

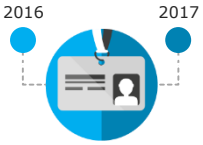
Trips England

Volume of trips (millions) (2016 vs 2017)

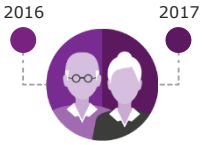
All trips



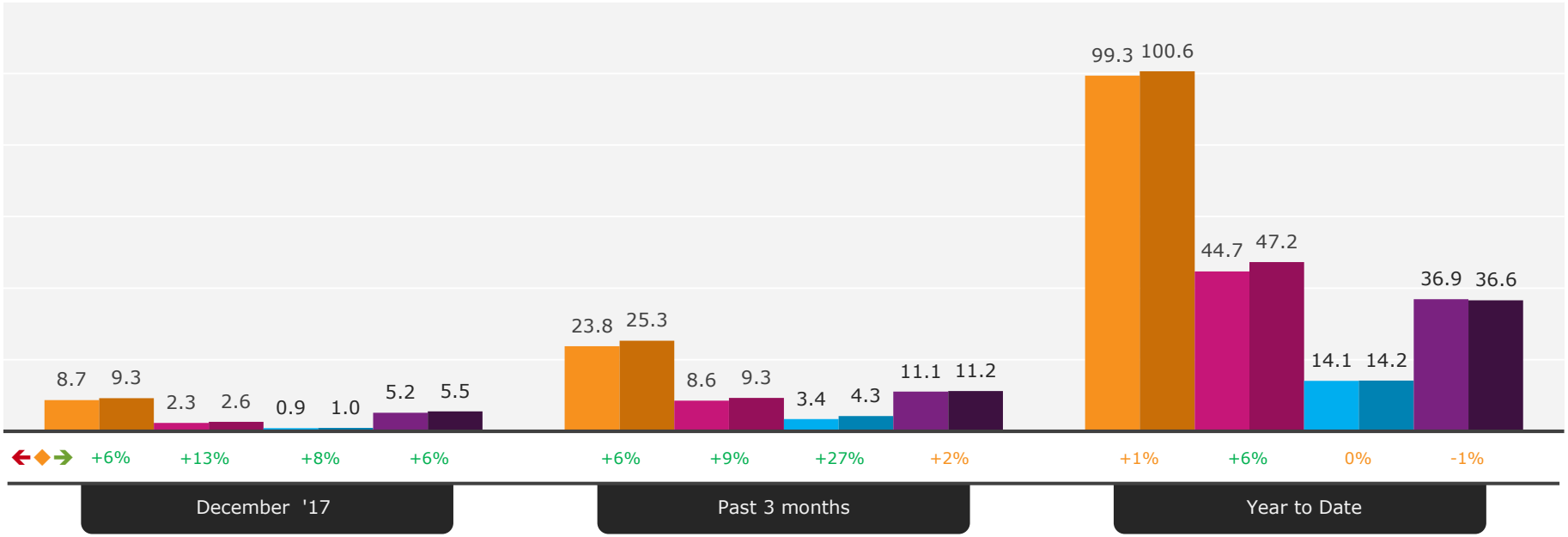
Holiday trips



Business trips



VFR trips



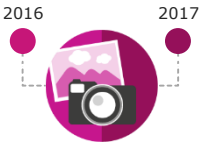
% change vs 2016

VisitEngland

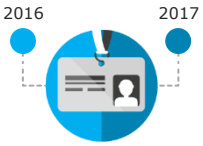
Nights England

Volume of nights (millions) (2016 vs 2017)

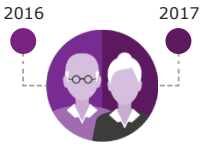
All trips



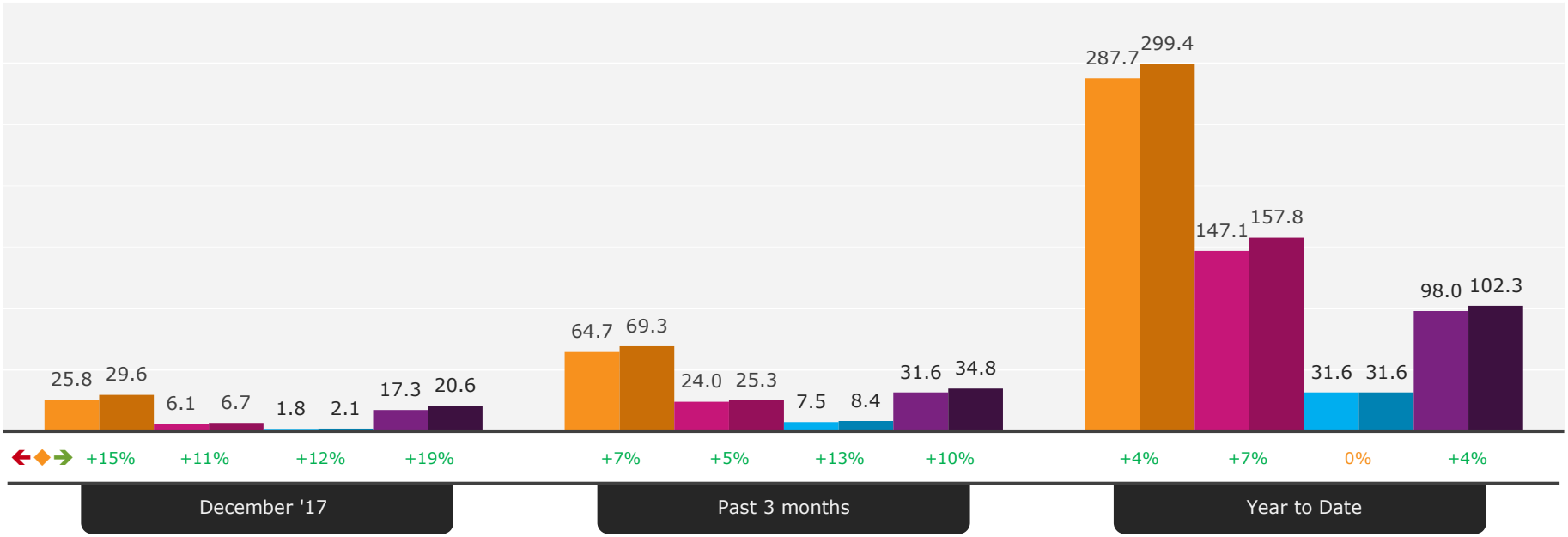
Holiday trips



Business trips



VFR trips

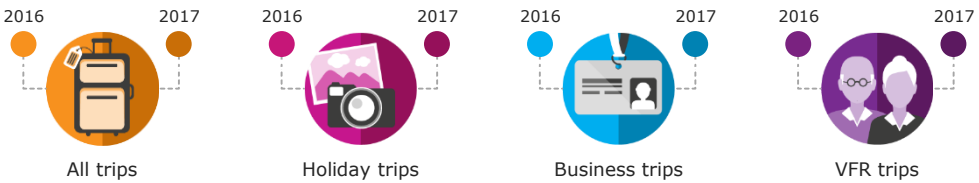


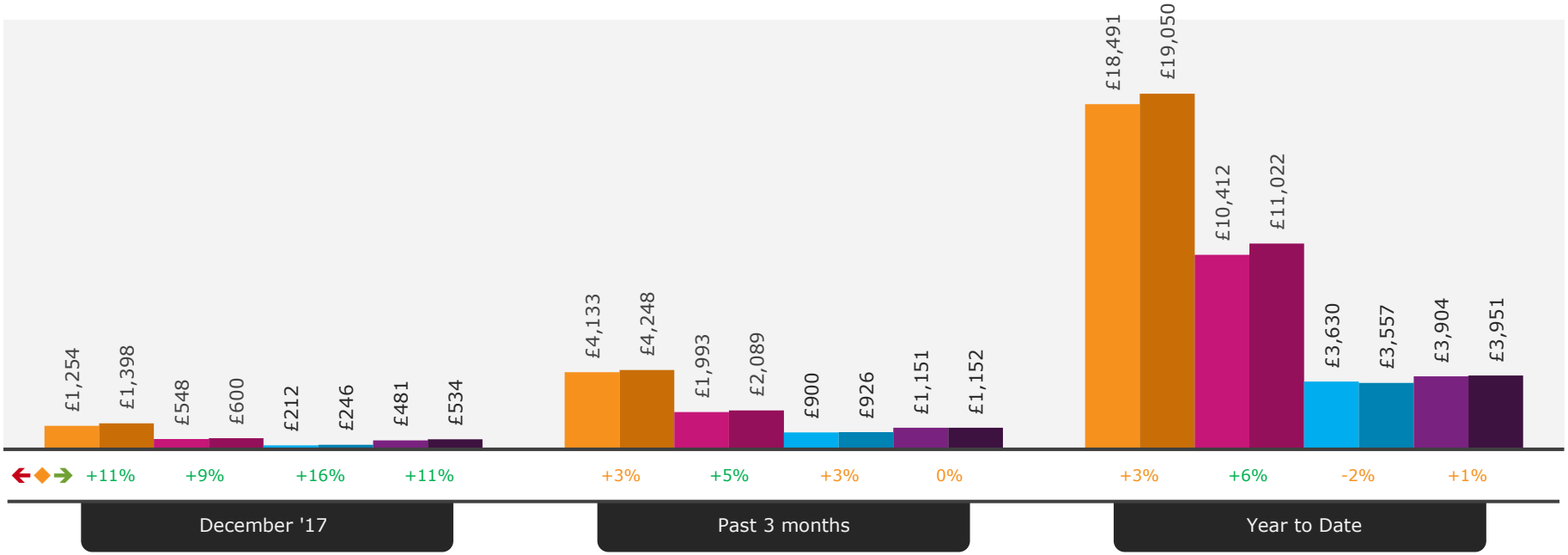
% change vs 2016

VisitEngland

Spend England

Expenditure (£m) (2016 vs 2017)

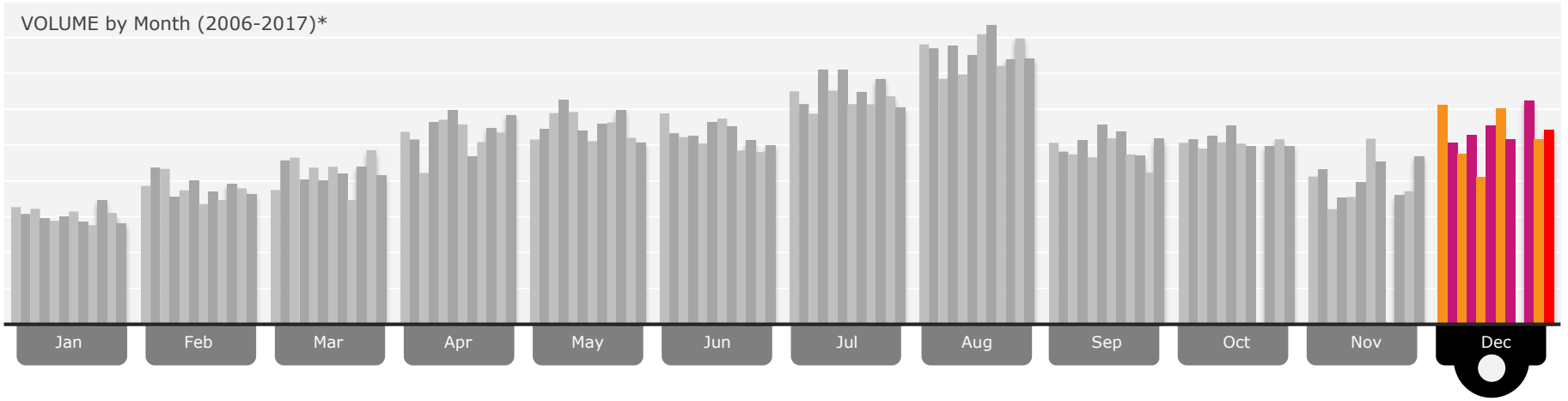


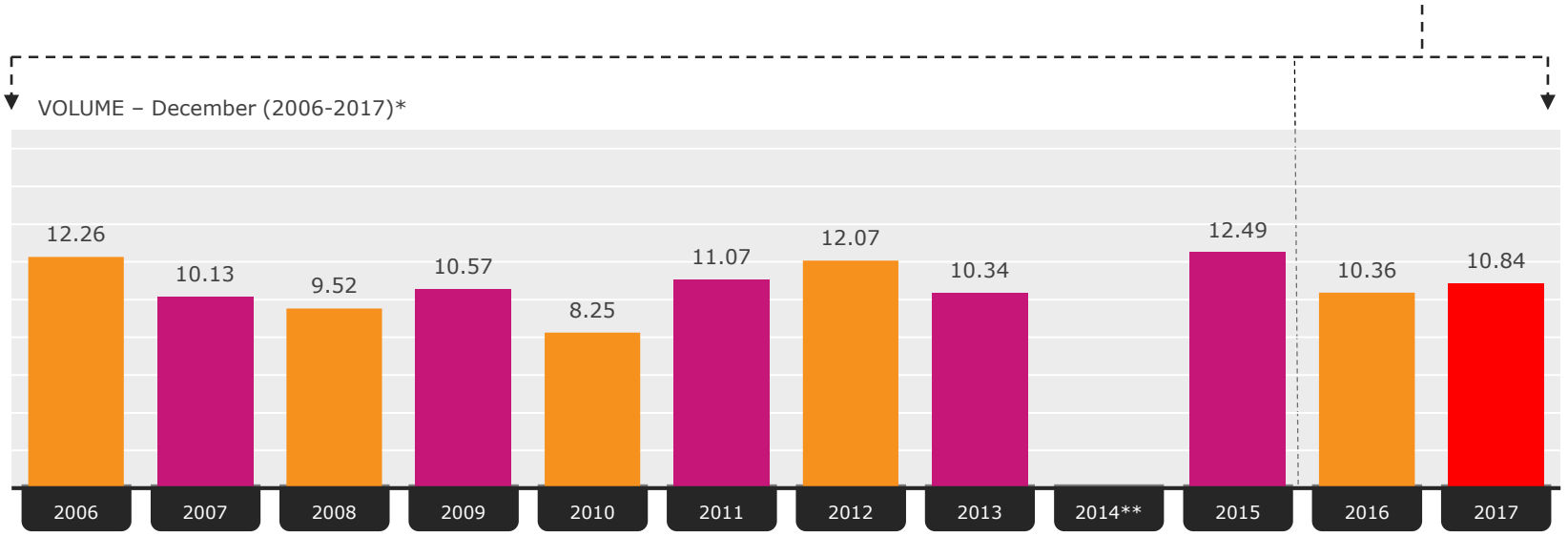


% change vs 2016

Long Term Trends by Month GB

2006-2017 (millions)*





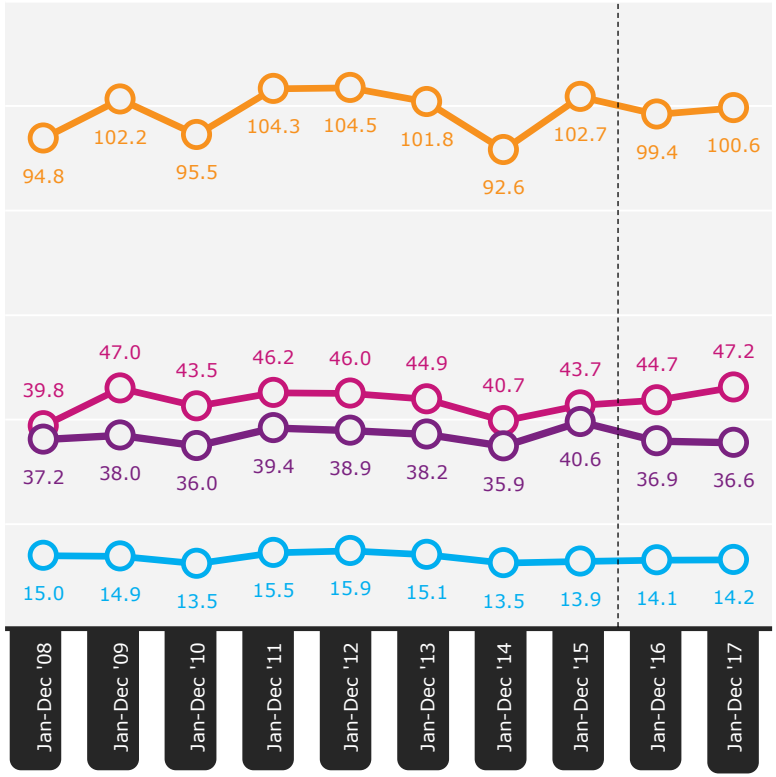
VisitEngland

*Break in time series 2015-2016 – see slide 2
** Due to a data collection issue, separate November 2014 data is not available

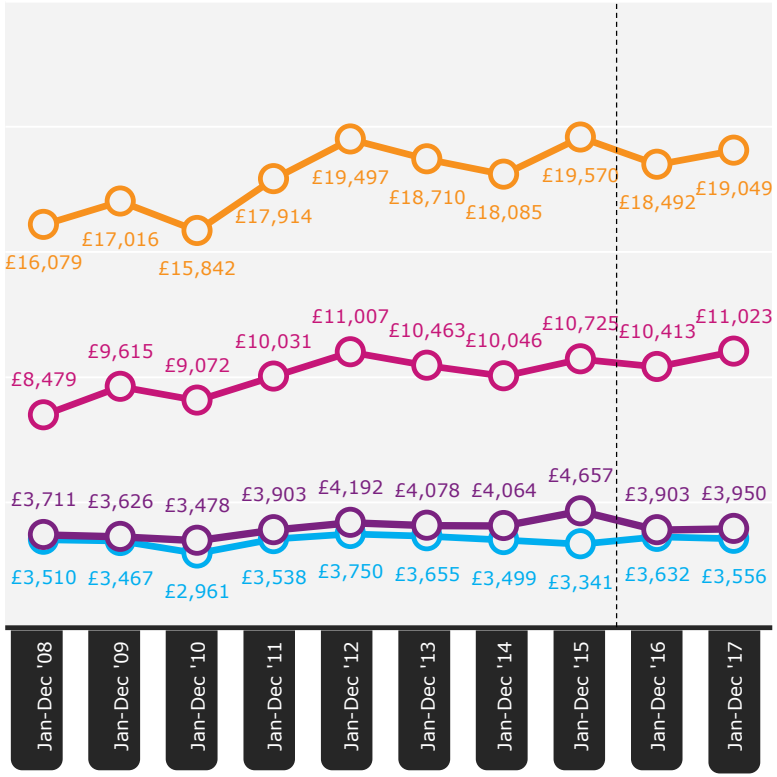
Long Term Trends, Year-to-Year England

All Trips | Holiday Trips | Business Trips | VFR Trips

Trip Volume (millions)*



Spend (£m)*



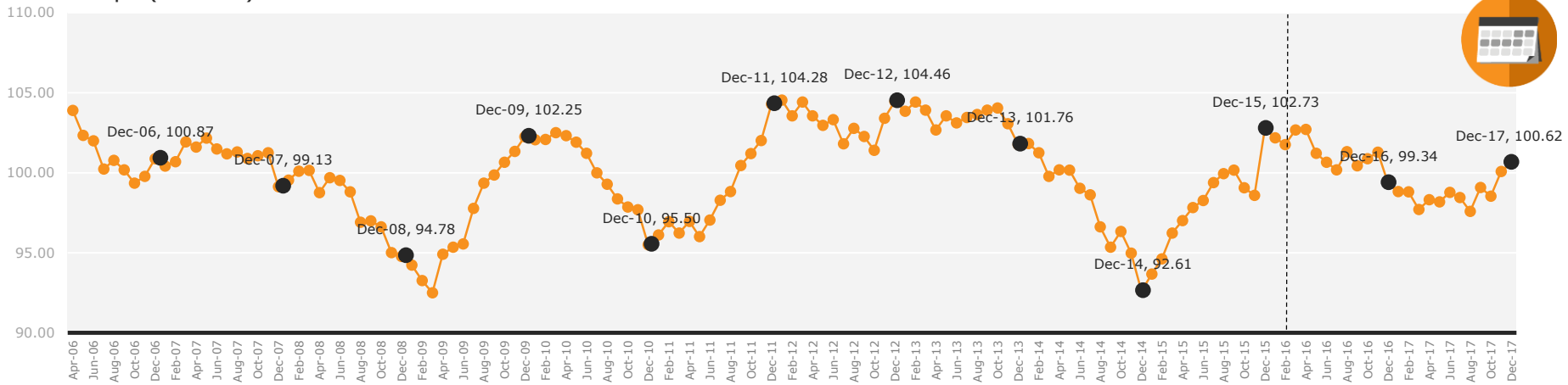
VisitEngland

*Break in time series 2015-2016 – see slide 2
** Due to a data collection issue, separate November 2014 data is not available

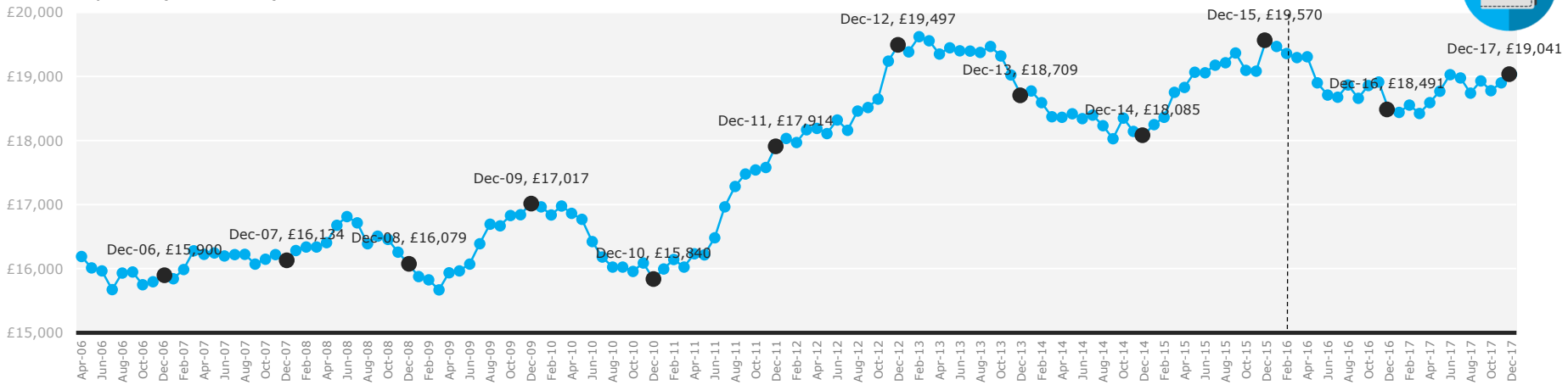
Rolling 12 Month Trendlines England

All trips and spend

All Trips (millions)*



Spend (£millions)*

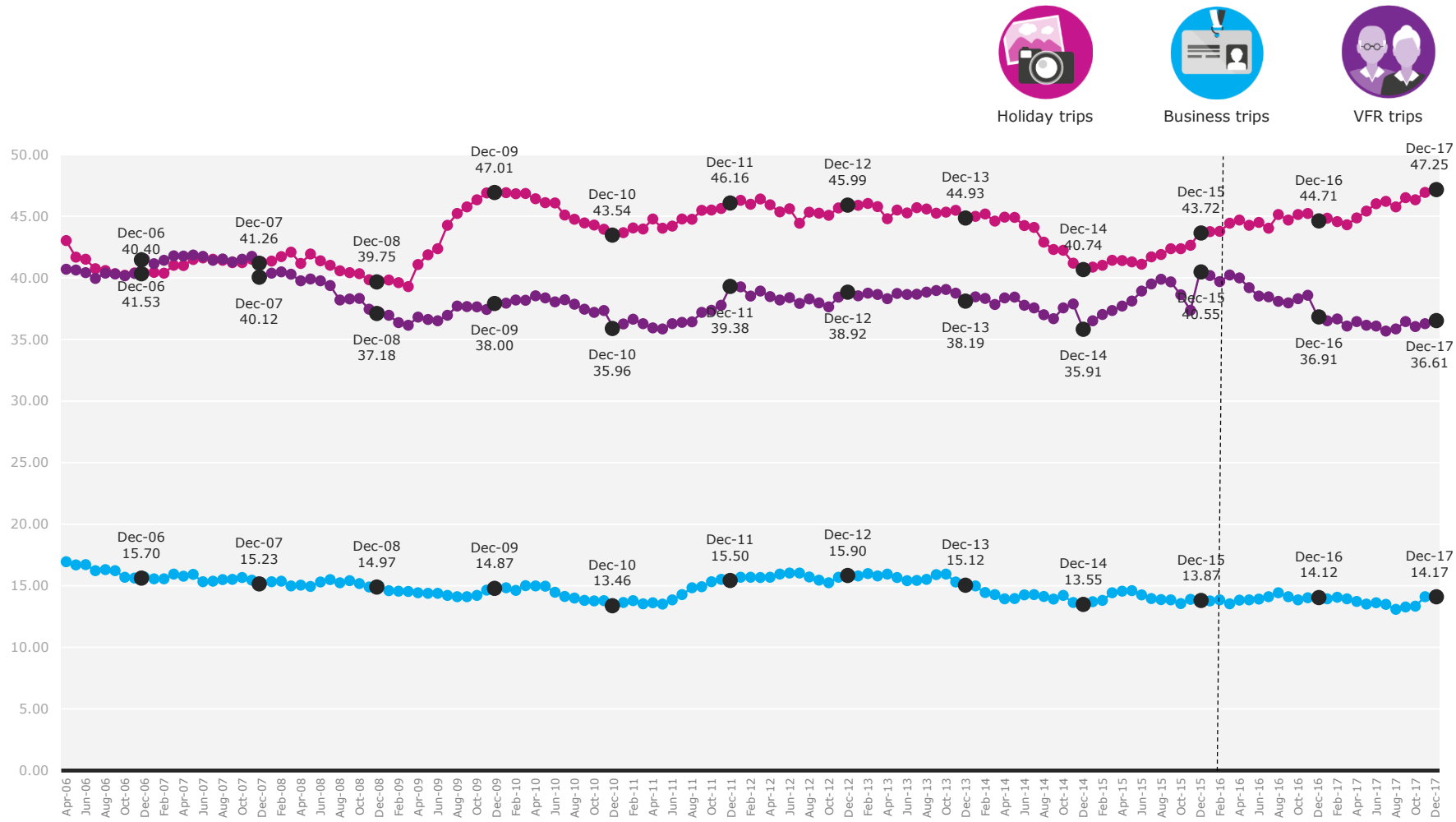


VisitEngland

*Break in time series 2015-2016 – see slide 2

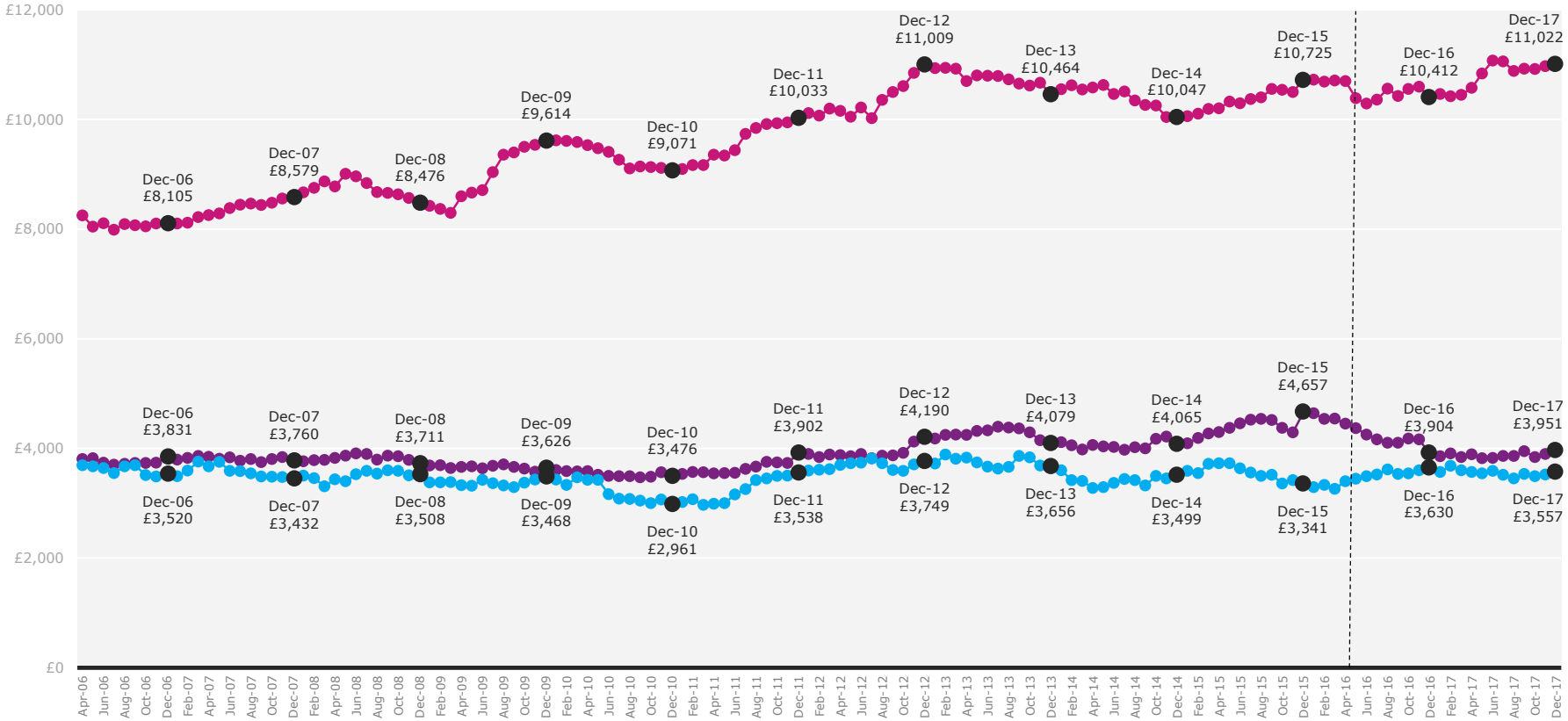
Rolling 12 Month Trendlines England

Trips by purpose (millions)*



Rolling 12 Month Trendlines England

Spend by purpose (£millions)*

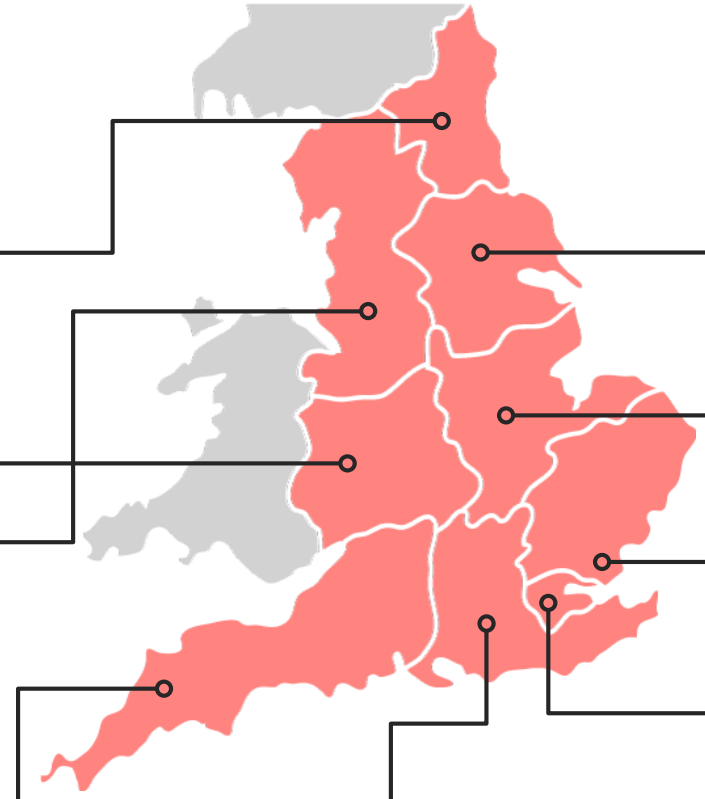


VisitEngland

*Break in time series 2015-2016 – see slide 2

Regional Analysis England

Trip characteristics – region (YTD 2016 vs YTD 2017)



Trips (Millions) | Nights (Millions) | Spend (£ millions)

North East		
YTD		
2016	2017	
3.3	3.6	+7%
10.0	10.9	+9%
632	680	+8%

Yorkshire & Humber		
YTD		
2016	2017	
9.3	10.7	+15%
27.1	29.3	+8%
1617	1745	+8%

North West		
YTD		
2016	2017	
12.0	13.7	+14%
31.2	37.8	+21%
2366	2733	+16%

East Midlands		
YTD		
2016	2017	
7.3	7.5	+3%
19.7	21.7	+10%
1088	1049	-4%

West Midlands		
YTD		
2016	2017	
8.9	7.9	-11%
21.9	18.4	-16%
1340	1225	-9%

South West		
YTD		
2016	2017	
20.4	20.6	+1%
73.6	76.8	+4%
4330	4456	+3%

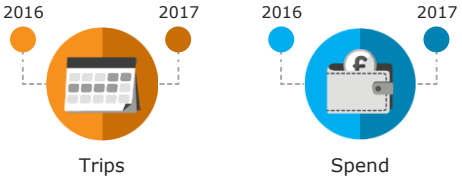
South East		
YTD		
2016	2017	
18.4	16.1	-13%
48.5	43.0	-11%
2814	2709	-4%

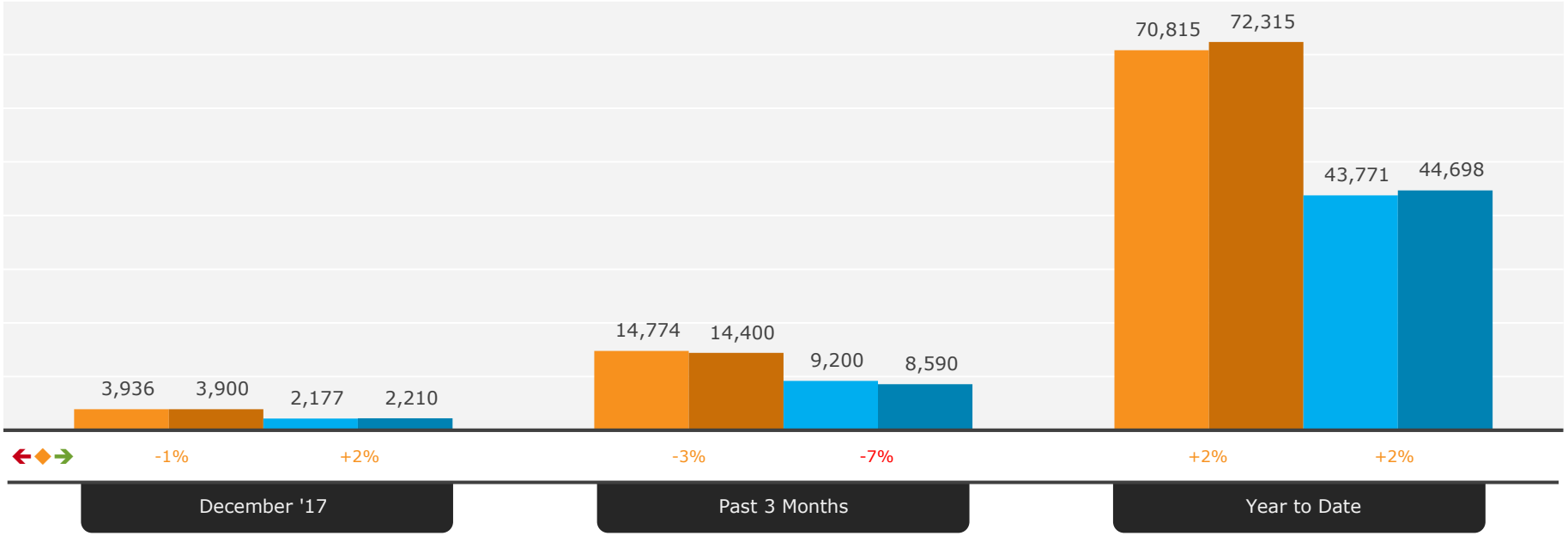
London		
YTD		
2016	2017	
12.1	12.1	0%
26.3	27.8	+6%
2766	2689	-3%

East		
YTD		
2016	2017	
9.5	9.7	+3%
28.8	32.6	+13%
1513	1710	+13%

UK Outbound Travel (International Passenger Survey)

Total volume (millions) and spend (£m)





% change vs 2016

VisitEngland

Appendix: Domestic Tourism England

Trip characteristics (Year-To-Date: Jan-December 2017)

PURPOSE

		Pure Holiday	1-3 nights	+4 nights	VFR (on holiday)	Holiday (total)	VFR (non-holiday)	VFR (total)	Business
TRIPS Millions	2016	44.7	29.3	15.4	25.2	69.9	11.7	36.9	14.1
	2017	47.2	31.4	15.8	25.0	72.2	11.6	36.6	14.2
	←◆→	+6%	+7%	+3%	-1%	+3%	-1%	-1%	0%
NIGHTS Millions	2016	147.1	59.0	88.0	70.9	217.9	27.2	98.0	31.6
	2017	157.8	63.0	94.8	74.6	232.4	27.7	102.3	31.6
	←◆→	+7%	+7%	+8%	+5%	+7%	+2%	+4%	0%
SPEND £Millions	2016	10412	5718	4699	2685	13098	1217	3904	3630
	2017	11022	6054	4970	2738	13761	1213	3951	3557
	←◆→	+6%	+6%	+6%	+2%	+5%	0%	+1%	-2%
	Unwtd Trips	6648	4251	2400	3468	10117	1601	5068	1536

REGION

		West Midlands	East of England	East Midlands	London	North West	North East	South East	South West	Yorkshire & Humber
TRIPS Millions	2016	8.9	9.5	7.3	12.1	12.0	3.3	18.4	20.4	9.3
	2017	7.9	9.7	7.5	12.1	13.7	3.6	16.1	20.6	10.7
	←◆→	-11%	+3%	+3%	0%	+14%	+7%	-13%	+1%	+15%
NIGHTS Millions	2016	21.9	28.8	19.7	26.3	31.2	10.0	48.5	73.6	27.1
	2017	18.4	32.6	21.7	27.8	37.8	10.9	43.0	76.8	29.3
	←◆→	-16%	+13%	+10%	+6%	+21%	+9%	-11%	+4%	+8%
SPEND £Millions	2016	1340	1513	1088	2766	2366	632	2814	4330	1617
	2017	1225	1710	1049	2689	2733	680	2709	4456	1745
	←◆→	-9%	+13%	-4%	-3%	+16%	+8%	-4%	+3%	+8%
	Unwtd Trips	1028	1367	1041	1523	1863	490	2136	2859	1462

←◆→ % change vs 2016

Appendix: Domestic Tourism England

Trip characteristics (Year-To-Date: Jan-December 2017)

LOCATION TYPE

		Seaside	Large City/Town	Small Town	Countryside /Village
TRIPS Millions	2016	23.4	41.1	19.6	17.0
	2017	22.7	42.6	19.1	17.1
	←◆→	-3%	+3%	-3%	+1%
NIGHTS Millions	2016	84.5	94.3	52.7	53.3
	2017	86.7	100.7	52.9	55.2
	←◆→	+3%	+7%	0%	+4%
SPEND £Millions	2016	4915	7696	2823	2850
	2017	4892	7964	2902	3047
	←◆→	0%	+3%	+3%	+7%
	Unwtd Trips	3329	5478	2542	2347

SOCIAL GRADE

		AB	C1	C2	DE
TRIPS 000s	2016	42.8	30.5	14.9	11.2
	2017	43.0	30.8	15.6	11.2
	←◆→	0%	+1%	+5%	+1%
NIGHTS 000s	2016	118.2	87.5	45.8	36.2
	2017	117.7	94.4	49.2	38.0
	←◆→	0%	+8%	+8%	+5%
SPEND £Millions	2016	8517	5495	2676	1803
	2017	8559	5779	2842	1867
	←◆→	0%	+5%	+6%	+4%
	Unwtd Trips	4668	4369	2361	2200

AGE

		16-24	25-34	35-44	44-54	55+
TRIPS Millions	2016	10.9	16.7	19.3	20.8	31.6
	2017	10.6	18.0	19.5	19.9	32.6
	←◆→	-2%	+7%	+1%	-4%	+3%
NIGHTS Millions	2016	32.7	43.3	55.1	55.6	100.9
	2017	36.3	47.7	52.7	55.3	107.5
	←◆→	+11%	+10%	-4%	-1%	+7%
SPEND £Millions	2016	1801	2860	3355	4440	6033
	2017	1777	3361	3298	4081	6531
	←◆→	-1%	+18%	-2%	-8%	+8%
	Unwtd Trips	1307	2359	2453	2280	5196

CHILDREN IN H/H

		Any	None
TRIPS 000s	2016	32.3	67.1
	2017	33.8	66.8
	←◆→	+5%	0%
NIGHTS 000s	2016	93.3	194.3
	2017	97.6	201.8
	←◆→	+5%	+4%
SPEND £Millions	2016	5269	13221
	2017	5496	13553
	←◆→	+4%	+3%
	Unwtd Trips	4668	8925

←◆→ % change vs 2016

Appendix: Domestic Tourism England

Trip characteristics (Year-To-Date: Jan-December 2017)

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 Millions	2016	62.4	42.3	36.4	4.0	20.8	11.9	36.2	*	36.2
	2017	62.9	43.1	36.7	4.5	20.8	11.8	35.7	*	35.7
	←◆→	+1%	+2%	+1%	+11%	0%	-1%	-1%	+46%	-1%
NIGHTS Millions	2016	179.4	90.4	73.7	8.6	88.4	47.0	102.0	*	102.0
	2017	181.2	92.4	75.4	10.3	90.4	50.1	106.6	*	106.6
	←◆→	+1%	+2%	+2%	+19%	+2%	+7%	+4%	+79%	+4%
SPEND £millions	2016	15035	10592	9016	870	4650	1732	3094	*	3094
	2017	15263	10703	9097	1065	4721	1758	3133	*	3133
	←◆→	+2%	+1%	+1%	+22%	+2%	+2%	+1%	+67%	+1%
Unwtd Trips		8394	5593	4751	597	2958	1728	4885	77	4885

*caution small sample size ←◆→ % change vs 2016

Appendix: Domestic Tourism England

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

All Tourism

Holidays

Business

VFR

	All Tourism						Holidays						Business						VFR					
	2012	2013	2014	2015	2016	2017	2012	2013	2014	2015	2016	2017	2012	2013	2014	2015	2016	2017	2012	2013	2014	2015	2016	2017
Trip Length	2.97	2.92	2.95	2.92	2.90	2.98	3.40	3.33	3.37	3.35	3.29	3.34	2.32	2.13	2.29	2.17	2.24	2.23	2.75	2.77	2.71	2.75	2.66	2.80
Spend Per Night	£63	£63	£66	£65	£64	£64	£70	£70	£73	£73	£71	£70	£102	£113	£113	£111	£115	£112	£39	£38	£42	£42	£40	£39
Spend Per Trip	£187	£184	£195	£191	£186	£189	£239	£233	£247	£245	£233	£233	£236	£242	£258	£241	£257	£251	£108	£107	£113	£115	£106	£108

VisitEngland

*Break in time series 2015-2016 – see slide 2

Note about these results:

The GB Tourism Survey is a survey of British residents, in which 2000 respondents are interviewed each week, making a total of 100,000 each year.

Any respondent having taken one or more overnight trips in the previous 4 week period is asked to describe the details of trips taken. Each year, data from around 17,000 trips is collected, and this is subsequently grossed up to provide population estimates. Full details of the survey methodology can be found at: https://www.visitbritain.org/archive-great-britain-tourism-survey-overnight-data

On an annual basis, the survey is extremely robust, with a confidence level for England data at +/- 3% at the 95% level for the number of trips and nights measured, and +/- 4% for the expenditure figure.

For shorter time periods and for other subsets of the data such as region or trip purpose, the margin of error is wider – guidance on confidence intervals at national and regional level for annual and quarterly data is provided on the next page.

For any questions about data interpretation, please contact VEResearch@visitengland.org

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Users wishing to include results from this survey within a press release should contact Charlotte Sanders in the VisitEngland Press Office charlotte.sanders@visitengland.org for review prior to external release.

GB Domestic Tourism:
Confidence Limits at the 95% level

	TRIPS (millions)		BEDNIGHTS (millions)		EXPENDITURE (£ millions)	
Destination:	**Single Quarter**	**Annual**	**Single Quarter**	**Annual**	**Single Quarter**	**Annual**
GB Total	**5.8%**	**2.6%**	**7.0%**	**3.1%**	**7.4%**	**3.5%**
England Total	**6.2%**	**2.8%**	**7.3%**	**3.3%**	**8.1%**	**3.8%**
East	17.1%	7.8%	19.0%	9.7%	22.4%	11.2%
East Midlands	17.7%	8.3%	21.4%	10.3%	23.2%	11.2%
London	15.9%	7.5%	26.5%	11.6%	24.9%	11.4%
North East	24.6%	11.3%	29.4%	13.6%	37.1%	17.6%
North West	12.9%	6.2%	16.3%	7.5%	17.4%	8.4%
South East	12.8%	6.0%	17.2%	7.7%	18.2%	8.4%
South West	12.7%	5.5%	13.4%	6.4%	16.4%	7.9%
West Midlands	16.6%	8.1%	19.1%	10.4%	21.8%	11.8%
Yorks & Humb	15.7%	7.2%	19.3%	9.4%	20.8%	10.5%

Based on Quarter 4