



# Great Britain Tourism Survey

November 2017



# 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   |
|---|-------|--------|-------|---|
| November 2017   |       |        |       |   |
|   | +26%  | +18%   | +17%  | <ul style="list-style-type: none"> <li>There were 9.4 million domestic overnight trips in GB in November 2017, which is up from 7.4 million trips in November 2016.</li> <li>Expenditure increased by +17% to £1.7 billion, while the number of nights increased by +17% to 21.8 million.</li> </ul>                            |
|   | +24%  | +18%   | +10%  | <ul style="list-style-type: none"> <li>There were 7.9 million domestic overnight trips to England in November 2017, up by +24% on the same month last year.</li> <li>Spend increased by +10% to £1.3 billion, while bednights increased by +18% to 18.1 million.</li> </ul>   |
| YEAR-TO-DATE  |       |        |       |   |
|   | +1%   | +1%    | +2%   | <ul style="list-style-type: none"> <li>In the year to November 2017, GB trips were up +1% to 109.8 million, compared to 109.1 million in the same period in 2016.</li> <li>Nights were at a similar level for the year-to-date at 330.6 million, while spend increased for the year to date by +2% at £21.9 billion.</li> </ul> |
|  | +1%   | +2%    | +2%   | <ul style="list-style-type: none"> <li>In the year to November 2017, trips to England increased by +1% to 91.3 million, compared to 90.6 million in the same period in 2016.</li> <li>Nights increased by +2% to 266 million, while spend increased by +2% for the year to date.</li> </ul>                                     |

## Weather



## Context

- November started with relatively quiet weather. It was briefly mild for most on the 20th-22nd, when it turned very wet in parts of north-west England. The last week was generally cold, with widespread overnight frosts, though no outstandingly low temperatures.

# Summary of Results England

YEAR-TO-DATE (January-November 2017)

## Trip Characteristics

|  | Trips      | Nights             | Spend      | PURPOSE  |
|--|------------|--------------------|------------|--|
|  | +5%        | +6%                | +6%        | <ul style="list-style-type: none"> <li><b>HOLIDAY TRIPS</b> in England from January to November 2017 increased by +5% compared to the same period last year, with 44.6 million trips recorded.</li> <li>Expenditure increased by +6% to £10.4 billion, while nights increased by +6% to 149.5 million.</li> </ul>  |
|  | -2%        | +1%                | 0%         | <ul style="list-style-type: none"> <li><b>VISITS TO FRIENDS AND RELATIVES</b> decreased by -2% to 31.1 million, with bednights up by +1% and expenditure stable. Non-holiday VFR trips remained unchanged, and holiday VFR trips were down by -3%.</li> </ul>  |
|  | 0%         | -6%                | -4%        | <ul style="list-style-type: none"> <li><b>BUSINESS</b> trips remained stable for the January to November period at 13.2 million. Nights and spend both decreased compared to the same period in 2016, by -6% and -4% respectively.</li> </ul>  |
|  | 25-34      | 55+                | C2         | TRIP TAKERS  |
|  | +8%        | +4%                | +5%        | <ul style="list-style-type: none"> <li>Trips decreased amongst most age groups for the year-to-date in England, with the exception of those aged 25-34 and 55+. Trips increased by +8% for 25-34s and by +4% for those aged 55+.</li> <li>The C2 social class group saw a +5% increase in trips taken between January to November compared to the same period in 2016. All other groups saw an increase, except DEs .</li> </ul>   |
|  | North West | Yorkshire & Humber | North East | DESTINATION TYPE   |
|  | +11%       | +14%               | +7%        | <ul style="list-style-type: none"> <li>North West, Yorkshire &amp; Humber, and North East saw the greatest increases in trips taken between January and November – trip taking increased by +11%, +14%, and +7% respectively compared to the same period in 2016.</li> <li>There was a decrease in trips to seaside and small towns but an increase to countryside / village and cities for the January to November period compared to the same time in 2016.</li> </ul> |

# Context Other Surveys

## Overseas Travel by UK Residents

International Passenger Survey

October 2017

Jan – October 2017

Trips

Spend

Trips

Spend



-2%

-9%

+3%

+3%

- In October, trips by Brits decreased by -2% compared to the same period in 2016, whilst expenditure on these trips decreased by -9%.
- For the year to date, overseas trips were up by +3%. Expenditure also increased, by +3%.

## Other Tourism Surveys

November 17

Room

Bedspace

OCCUPANCY



-1%

-1%

- Room occupancy in England in November was unchanged compared to November 2016 to 78%, whilst bedspace occupancy declined by -1% to 53%.

Jan-Nov 17

Volume

Spend

DAY VISITS



-2%

-3%

- The number of tourism day visits in England in the period January to November 2017 decreased by -2% to 1.4 billion.
- The value of those visits decreased by -3% to £46.1 billion.

September 17

Attractions

Accommodation

TOURISM BUSINESS MONITOR



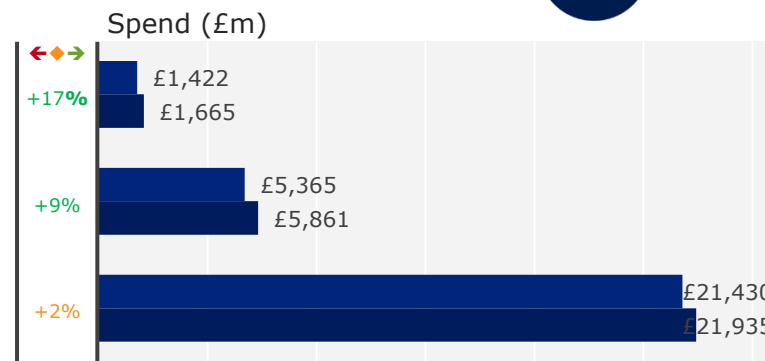
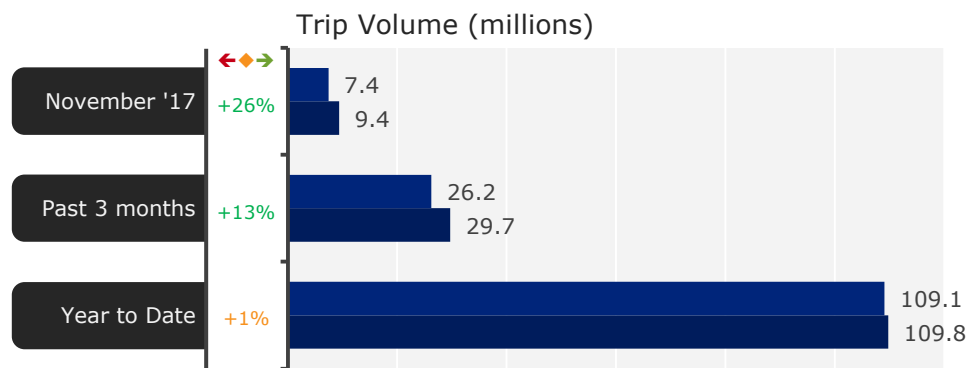
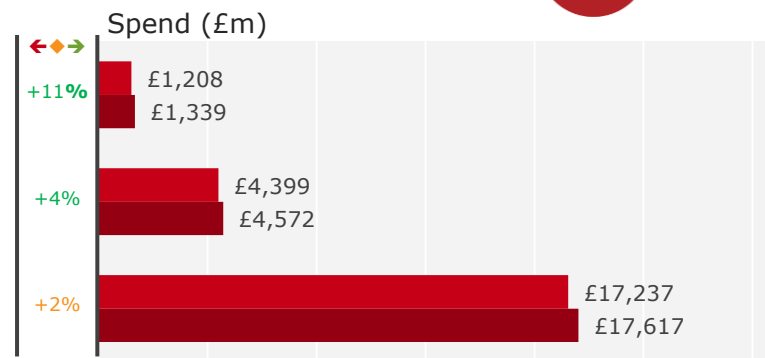
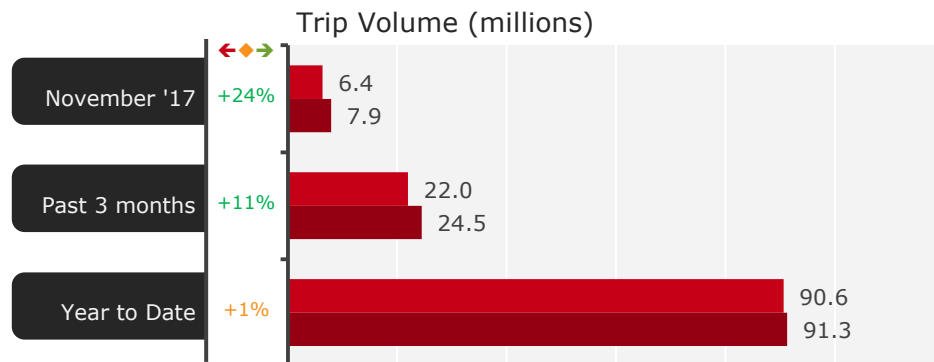
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- Attractions and accommodation businesses reported a varied performance for the period of mid-July until the end of the Summer holidays. Slightly more attractions reported increased visitor numbers than did this time last year, but the proportion 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

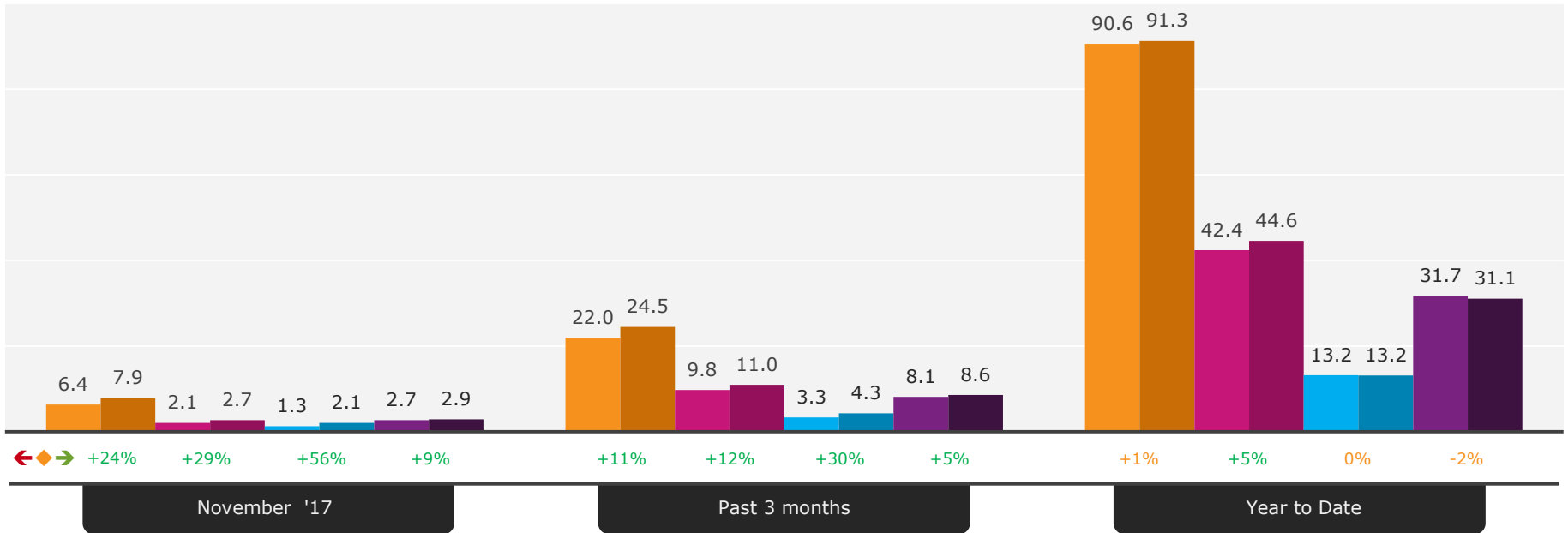
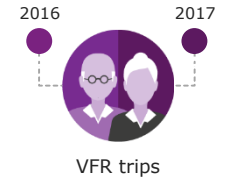
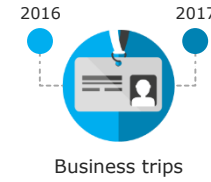
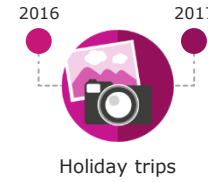
Volume and spend (2016 vs 2017)



◀◆▶ % change vs 2016

# Trips England

Volume of trips (millions) (2016 vs 2017)

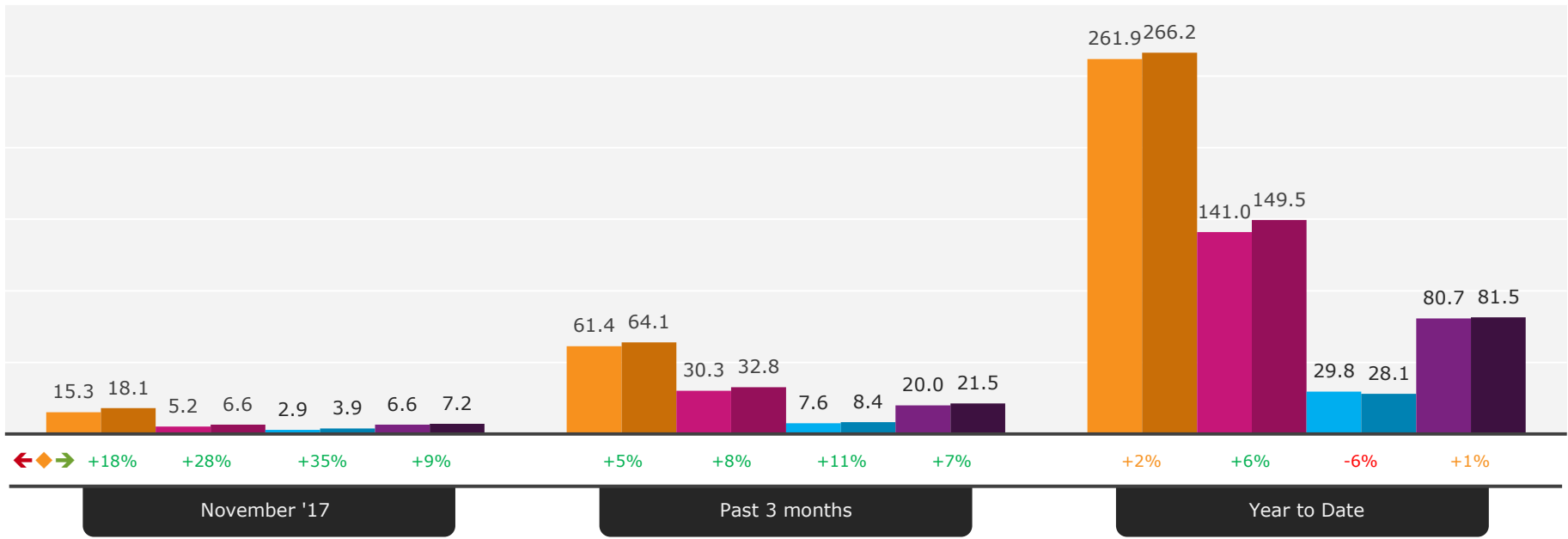
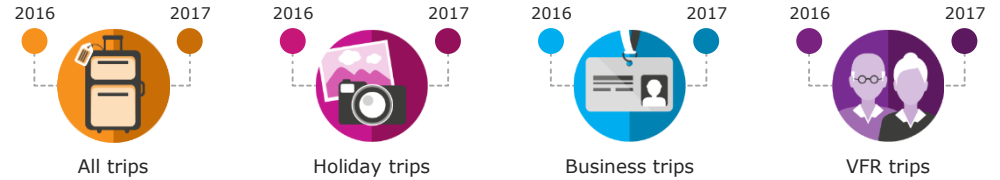


◀▶ % change vs 2016



# Nights England

Volume of nights (millions) (2016 vs 2017)

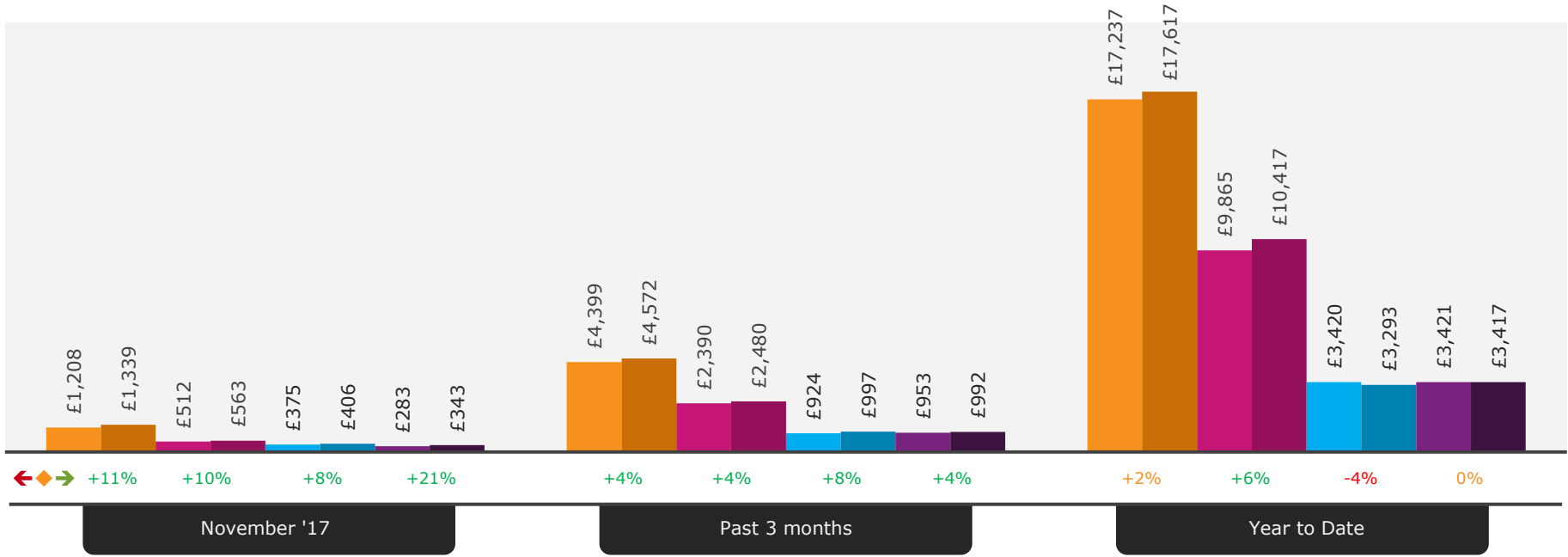
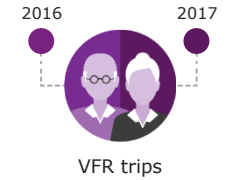
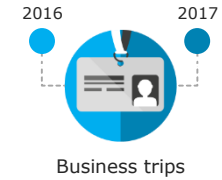
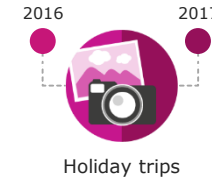
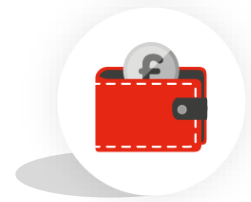


◀▶ % change vs 2016



# Spend England

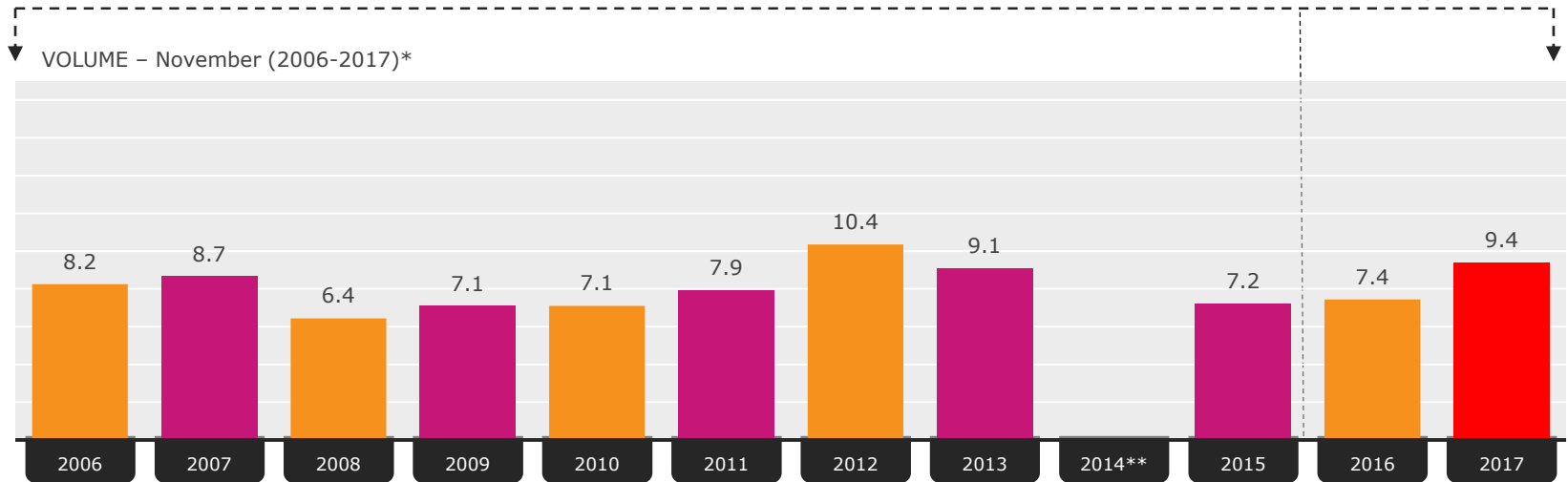
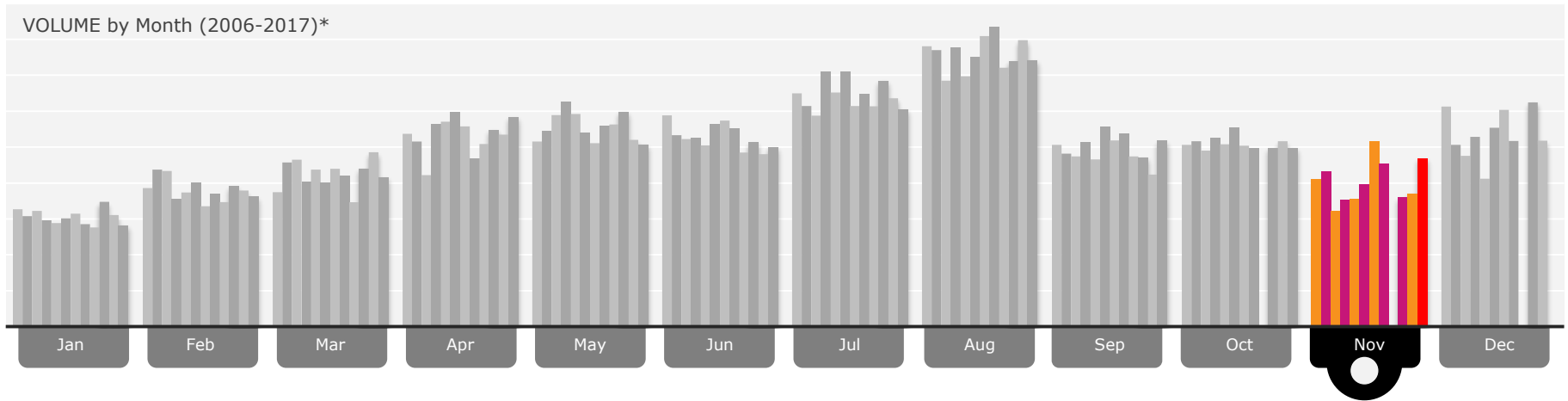
Expenditure (£m) (2016 vs 2017)



◀▶ % change vs 2016

# Long Term Trends by Month GB

2006-2017 (millions)\*



# Long Term Trends, Year-to-Year England



All Trips



Holiday Trips

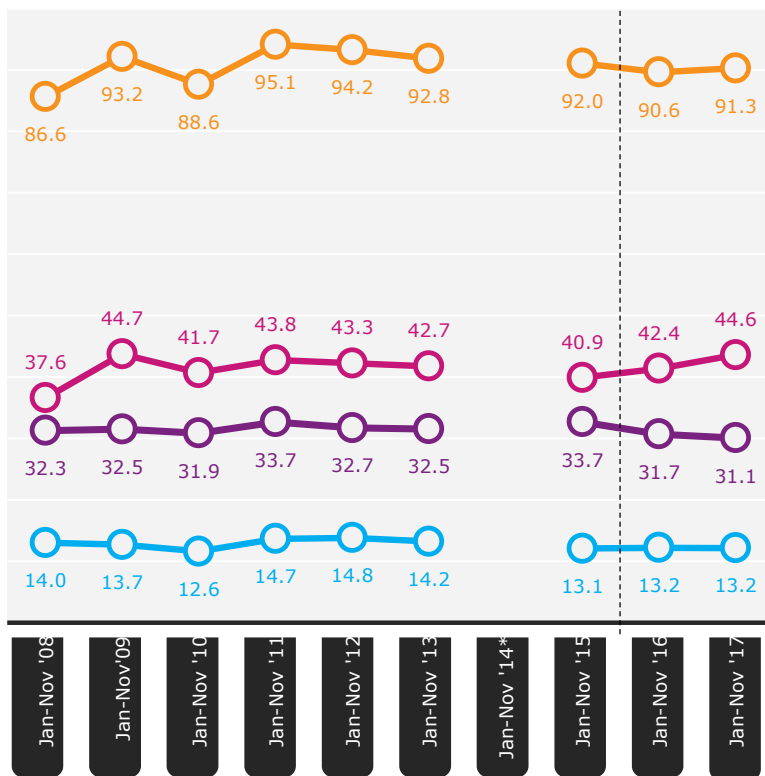


Business Trips

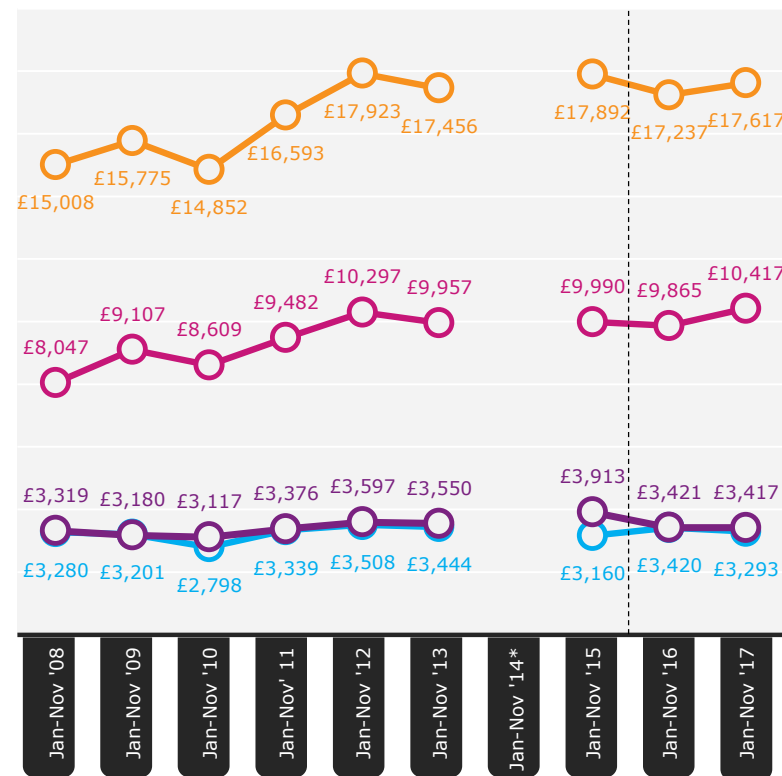


VFR Trips

Trip Volume (millions)\*

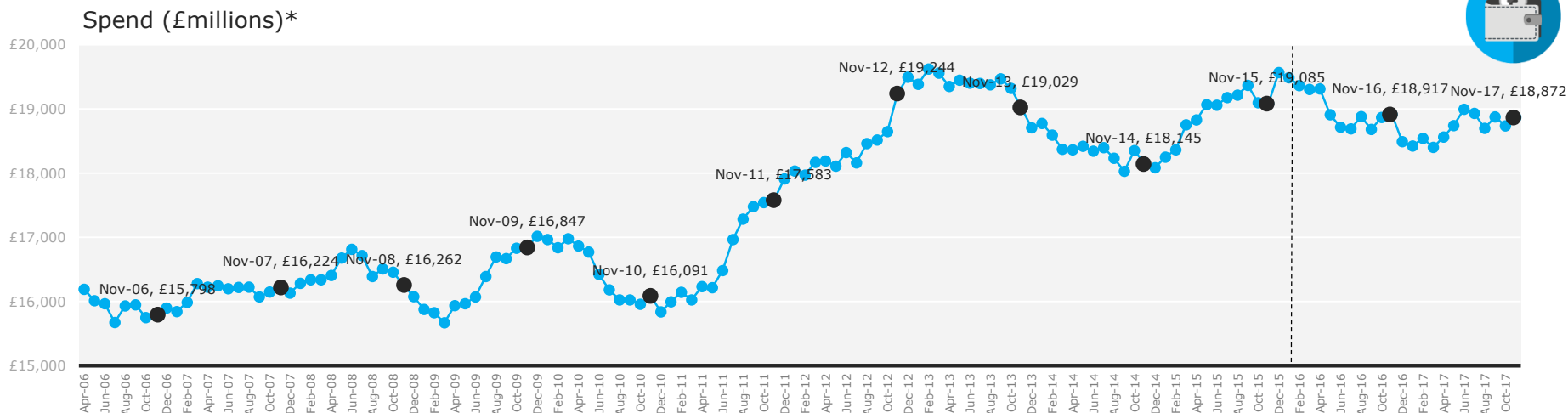
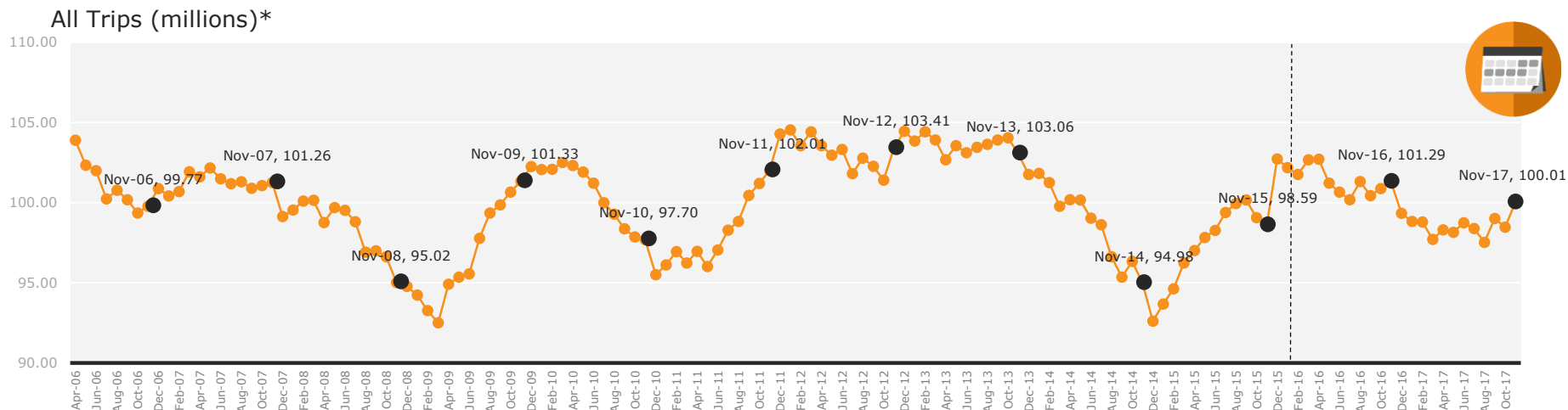


Spend (£m)\*



# Rolling 12 Month Trendlines England

All trips and spend



# Rolling 12 Month Trendlines England

Trips by purpose (millions)\*



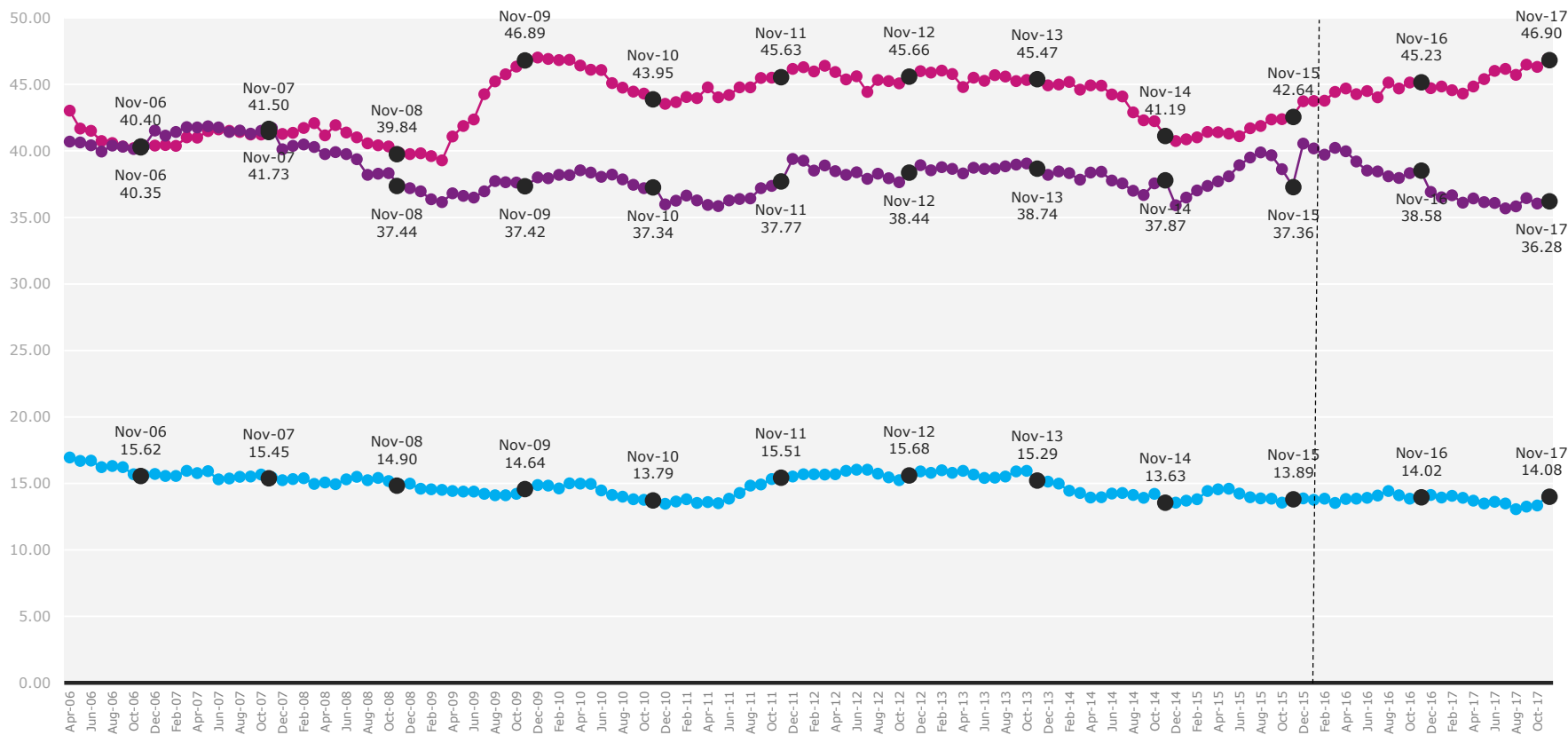
Holiday trips



Business trips



VFR trips



# Rolling 12 Month Trendlines England

Spend by purpose (£millions)\*



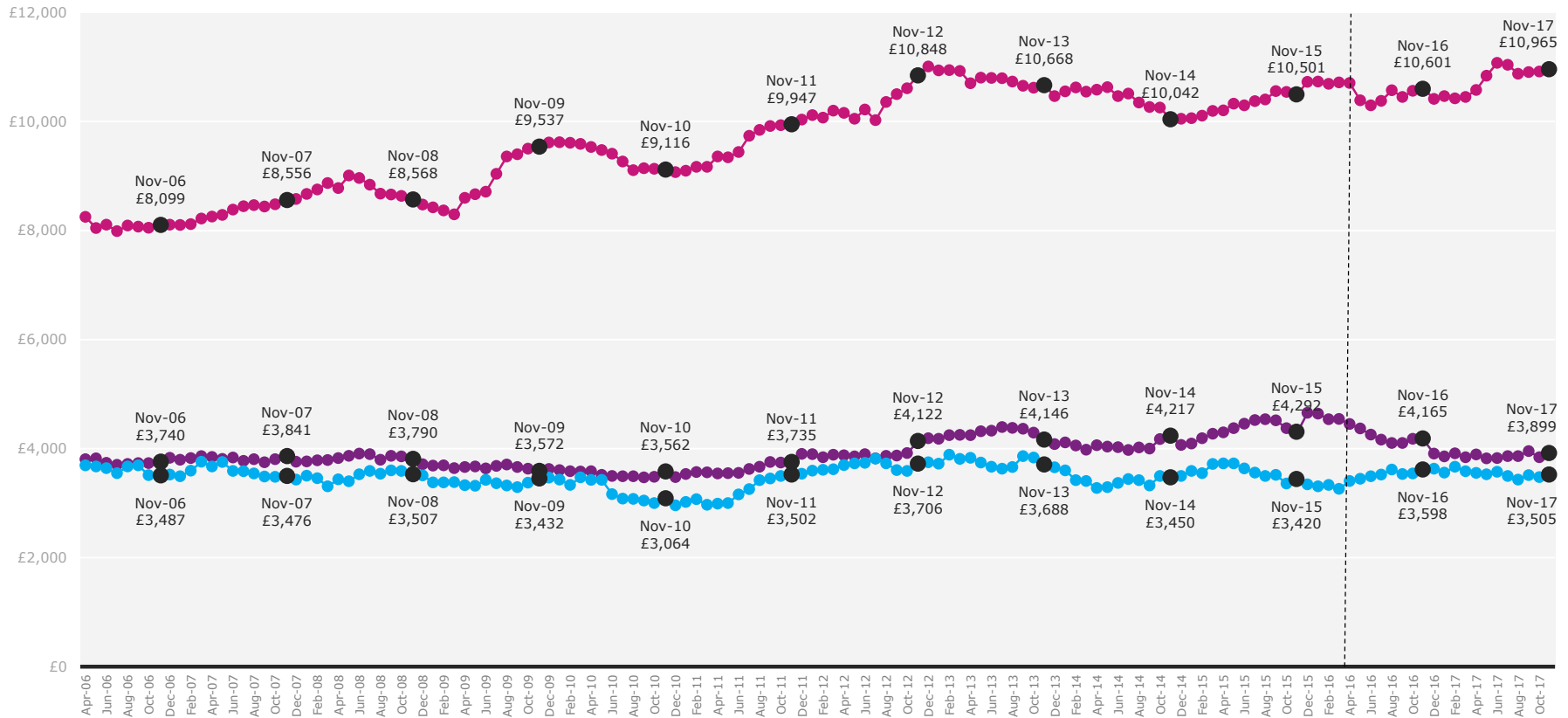
Holiday trips



Business trips

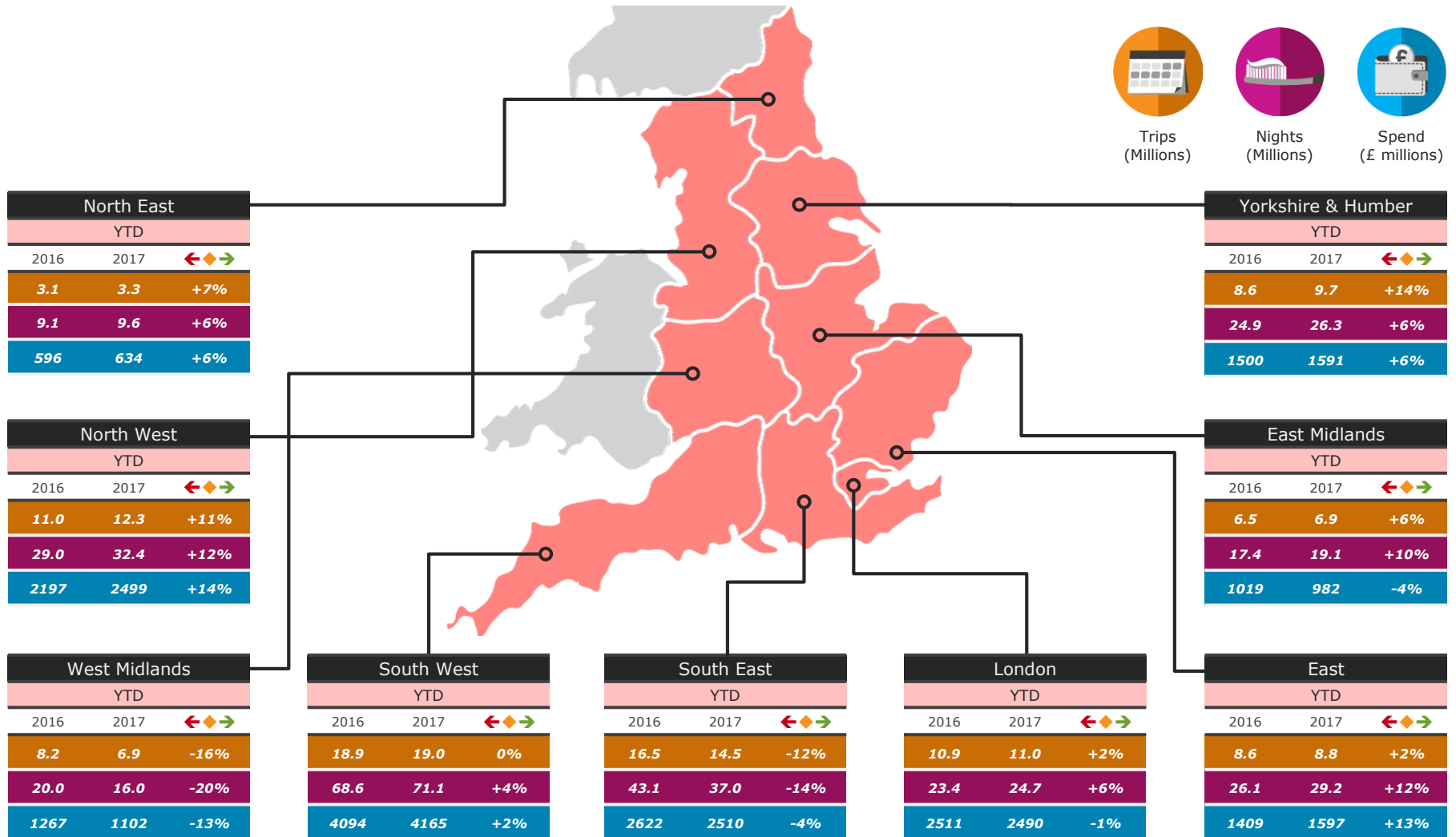


VFR trips



# Regional Analysis England

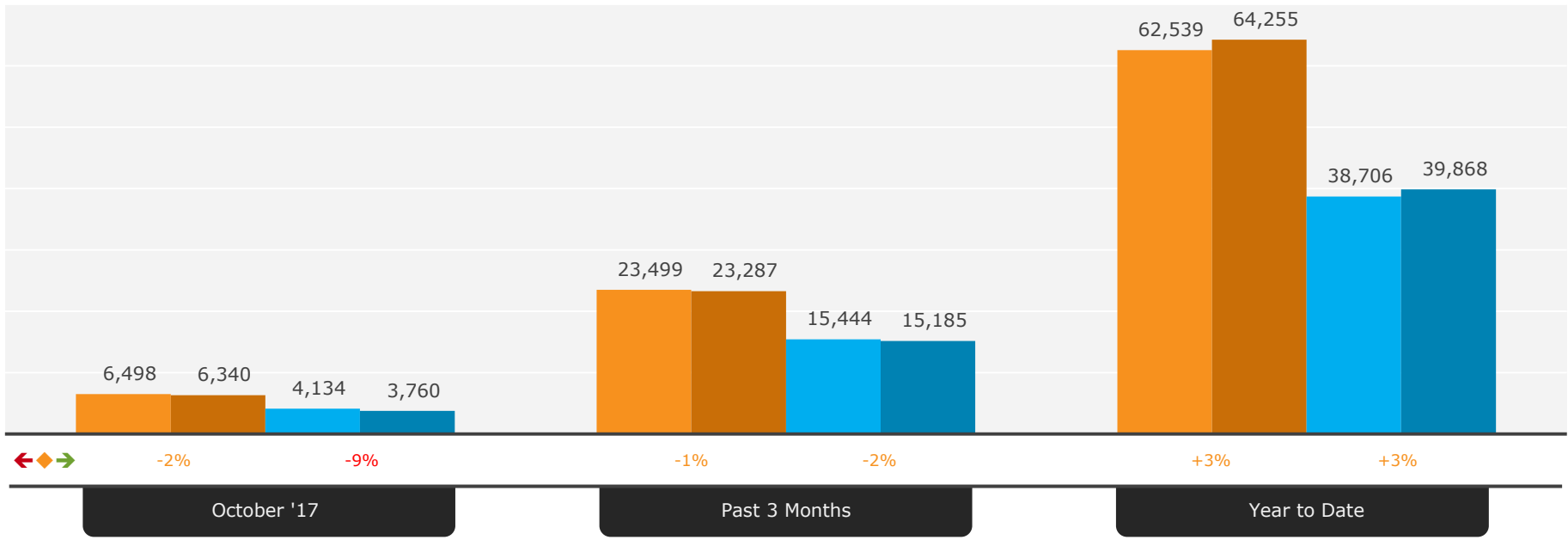
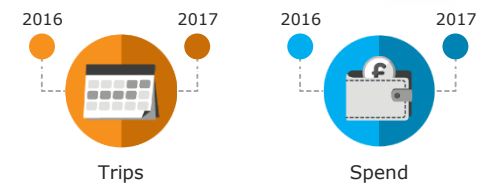
Trip characteristics – region (YTD 2016 vs YTD 2017)





# UK Outbound Travel (International Passenger Survey)

Total volume (millions) and spend (£m)






◀◆▶ % change vs 2016

# Appendix: Domestic Tourism England










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



## PURPOSE

|                    |      |  |  |  |                  |                 |                   |             |          |
|--------------------|------|---|---|---|------------------|-----------------|-------------------|-------------|----------|
|                    |      | Pure Holiday  | 1-3 nights  | +4 nights   | VFR (on holiday) | Holiday (total) | VFR (non-holiday) | VFR (total) | Business |
| TRIPS<br>Millions  | 2016 | 42.4  | 27.5  | 14.9  | 21.2             | 63.6            | 10.5              | 31.7        | 13.2     |
|                    | 2017 | 44.6  | 29.4  | 15.2  | 20.6             | 65.2            | 10.5              | 31.1        | 13.2     |
|                    | ◀◆▶  | 5%  | 7%  | 2%  | -3%              | 2%              | 0%                | -2%         | 0%       |
| NIGHTS<br>Millions | 2016 | 141.0   | 55.7  | 85.3  | 56.7             | 197.7           | 24.0              | 80.7        | 29.8     |
|                    | 2017 | 149.5   | 56.0  | 93.5  | 56.7             | 206.2           | 24.8              | 81.5        | 28.1     |
|                    | ◀◆▶  | 6%  | 1%  | 10%   | 0%               | 4%              | 3%                | 1%          | -6%      |
| SPEND<br>£Millions | 2016 | 9866  | 5311  | 4555  | 2302             | 12169           | 1117              | 3423        | 3418     |
|                    | 2017 | 10417   | 5452  | 4968  | 2301             | 12719           | 1115              | 3417        | 3293     |
|                    | ◀◆▶  | 6%  | 3%  | 9%  | 0%               | 5%              | 0%                | 0%          | -4%      |
| Unwtd Trips        |      | 6380  | 4065  | 2318  | 2935             | 9316            | 1479              | 4413        | 1473     |

## REGION

|                    |      |  |  |  |  |  |  |  |  |  |
|--------------------|------|---|---|---|---|--|---|---|---|---|
|                    |      | West Midlands   | East of England   | East Midlands   | London  | North West   | North East  | South East  | South West  | Yorkshire & Humber  |
| TRIPS<br>Millions  | 2016 | 8.2   | 8.6   | 6.5   | 10.9  | 11.0   | 3.1   | 16.5  | 18.9  | 8.6   |
|                    | 2017 | 6.9   | 8.8   | 6.9   | 11.0  | 12.3   | 3.3   | 14.5  | 19.0  | 9.7   |
|                    | ◀◆▶  | -16%  | 2%  | 6%  | 2%  | 11%  | 7%  | -12%  | 0%  | 14%   |
| NIGHTS<br>Millions | 2016 | 20.0  | 26.1  | 17.4  | 23.4  | 29.0   | 9.1   | 43.1  | 68.6  | 24.9  |
|                    | 2017 | 16.0  | 29.2  | 19.1  | 24.7  | 32.4   | 9.6   | 37.0  | 71.1  | 26.3  |
|                    | ◀◆▶  | -20%  | 12%   | 10%   | 6%  | 12%  | 6%  | -14%  | 4%  | 6%  |
| SPEND<br>£Millions | 2016 | 1267  | 1409  | 1019  | 2511  | 2197   | 596   | 2622  | 4094  | 1500  |
|                    | 2017 | 1102  | 1597  | 982   | 2490  | 2499   | 634   | 2510  | 4165  | 1591  |
|                    | ◀◆▶  | -13%  | 13%   | -4%   | -1%   | 14%  | 6%  | -4%   | 2%  | 6%  |
| Unwtd Trips        |      | 943   | 1268  | 963   | 1420  | 1716   | 457   | 1957  | 2673  | 1361  |

◀◆▶ % change vs 2016

# Appendix: Domestic Tourism England

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



| LOCATION TYPE   |      |         |                 |            |                     |
|-----------------|------|---------|-----------------|------------|---------------------|
|                 |      | Seaside | Large City/Town | Small Town | Countryside/Village |
| TRIPS Millions  | 2016 | 22.2    | 37.0            | 17.4       | 15.6                |
|                 | 2017 | 21.5    | 37.7            | 17.1       | 15.7                |
|                 | ↔    | -3%     | 2%              | -1%        | 1%                  |
| NIGHTS Millions | 2016 | 81.2    | 83.3            | 46.6       | 48.2                |
|                 | 2017 | 81.1    | 85.6            | 46.0       | 49.9                |
|                 | ↔    | 0%      | 3%              | -1%        | 4%                  |
| SPEND £Millions | 2016 | 4742    | 7026            | 2623       | 2656                |
|                 | 2017 | 4705    | 7199            | 2665       | 2810                |
|                 | ↔    | -1%     | 2%              | 2%         | 6%                  |
| Unwtd Trips     |      | 3184    | 4992            | 2324       | 2182                |

| SOCIAL GRADE    |      |       |      |      |      |
|-----------------|------|-------|------|------|------|
|                 |      | AB    | C1   | C2   | DE   |
| TRIPS 000s      | 2016 | 38.8  | 27.4 | 13.9 | 10.6 |
|                 | 2017 | 38.8  | 27.8 | 14.5 | 10.1 |
|                 | ↔    | 0%    | 2%   | 4%   | -5%  |
| NIGHTS 000s     | 2016 | 108.0 | 77.0 | 42.8 | 34.0 |
|                 | 2017 | 106.7 | 81.2 | 45.2 | 33.2 |
|                 | ↔    | -1%   | 6%   | 5%   | -2%  |
| SPEND £Millions | 2016 | 7982  | 4989 | 2526 | 1741 |
|                 | 2017 | 7942  | 5305 | 2658 | 1710 |
|                 | ↔    | -1%   | 6%   | 5%   | -2%  |
| Unwtd Trips     |      | 4319  | 4044 | 2222 | 2013 |

| AGE             |      |       |       |       |       |      |
|-----------------|------|-------|-------|-------|-------|------|
|                 |      | 16-24 | 25-34 | 35-44 | 44-54 | 55+  |
| TRIPS Millions  | 2016 | 9.8   | 15.3  | 17.9  | 19.0  | 28.6 |
|                 | 2017 | 9.4   | 16.5  | 17.8  | 17.9  | 29.7 |
|                 | ↔    | -4%   | 8%    | -1%   | -6%   | 4%   |
| NIGHTS Millions | 2016 | 28.1  | 39.1  | 51.8  | 51.5  | 91.4 |
|                 | 2017 | 28.4  | 44.1  | 48.7  | 47.6  | 97.5 |
|                 | ↔    | 1%    | 13%   | -6%   | -8%   | 7%   |
| SPEND £Millions | 2016 | 1635  | 2666  | 3168  | 4155  | 5609 |
|                 | 2017 | 1606  | 3167  | 3079  | 3704  | 6059 |
|                 | ↔    | -2%   | 19%   | -3%   | -11%  | 8%   |
| Unwtd Trips     |      | 1184  | 2221  | 2284  | 2104  | 4881 |

| CHILDREN IN H/H |      |      |       |
|-----------------|------|------|-------|
|                 |      | Any  | None  |
| TRIPS 000s      | 2016 | 29.8 | 60.8  |
|                 | 2017 | 31.1 | 60.2  |
|                 | ↔    | 4%   | -1%   |
| NIGHTS 000s     | 2016 | 87.1 | 174.8 |
|                 | 2017 | 90.5 | 175.8 |
|                 | ↔    | 4%   | 1%    |
| SPEND £Millions | 2016 | 4981 | 12256 |
|                 | 2017 | 5138 | 12478 |
|                 | ↔    | 3.2% | 1.8%  |
| Unwtd Trips     |      | 4381 | 8211  |

↔ % change vs 2016

# Appendix: Domestic Tourism England

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



## Accommodation



|                    |      | Commercial<br>Accommodation | (a)<br>Serviced accom | (b)<br>Hotel/motel/guest<br>house | (c)<br>Bed & Breakfast | Total<br>self-catering<br>rented | (a)<br>Camping &<br>Caravanning<br>(inc. owned caravans) | (b)<br>Other self-catering<br>rented | Hostels* | Own<br>home/friends/<br>relatives' |
|--------------------|------|-----------------------------|-----------------------|-----------------------------------|------------------------|----------------------------------|--|--------------------------------------|----------|------------------------------------|
| TRIPS<br>Millions  | 2016 | 58.7                        | 39.3                  | 33.6                              | 3.8                    | 20.0                             | 11.5   | 31.2                                 | 0.5      | 31.2                               |
|                    | 2017 | 59.1                        | 39.9                  | 33.8                              | 4.2                    | 16.8                             | 11.6   | 30.2                                 | 0.5      | 30.2                               |
|                    | ◀◆▶  | 1%                          | 1%                    | 0%                                | 10%                    | -16%                             | 1%   | -3%                                  | 52%      | -3%                                |
| NIGHTS<br>Millions | 2016 | 171.1                       | 84.4                  | 68.5                              | 8.3                    | 86.3                             | 46.1   | 84.8                                 | 0.7      | 84.8                               |
|                    | 2017 | 171.3                       | 85.3                  | 68.9                              | 9.8                    | 75.8                             | 49.4   | 84.6                                 | 1.0      | 84.6                               |
|                    | ◀◆▶  | 0%                          | 1%                    | 1%                                | 19%                    | -12%                             | 7%   | 0%                                   | 90%      | 0%                                 |
| SPEND<br>£millions | 2016 | 14191                       | 9899                  | 8378                              | 837                    | 4507                             | 1711   | 2693                                 | 76       | 2693                               |
|                    | 2017 | 14333                       | 9951                  | 8435                              | 996                    | 4194                             | 1742   | 2658                                 | 110      | 2658                               |
|                    | ◀◆▶  | 1%                          | 1%                    | 1%                                | 19%                    | -7%                              | 2%   | -1%                                  | 70%      | -1%                                |
| Unwtd Trips        |      | 8849                        | 5316                  | 4498                              | 578                    | 2442                             | 1709   | 4236                                 | 76       | 4236                               |

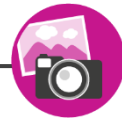
\*caution small sample size ◀◆▶ % change vs 2016

# Appendix: Domestic Tourism England

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



All Tourism



Holidays



Business



VFR

|                 | 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     | 2.96 | 2.90 | N/A  | 2.89 | 2.89 | 2.92 | 3.44 | 3.36 | N/A  | 3.38 | 3.33 | 3.35 | 2.33 | 2.14 | N/A  | 2.18 | 2.25 | 2.13 | 2.65 | 2.66 | N/A  | 2.63 | 2.55 | 2.62 |
| Spend Per Night | £64  | £65  | N/A  | £67  | £66  | £66  | £69  | £69  | N/A  | £72  | £70  | £70  | £42  | £41  | N/A  | £44  | £42  | £42  | £101 | £113 | N/A  | £111 | £115 | £117 |
| Spend Per Trip  | £190 | £188 | N/A  | £194 | £190 | £193 | £237 | £236 | N/A  | £244 | £233 | £234 | £237 | £242 | N/A  | £242 | £259 | £250 | £110 | £109 | N/A  | £116 | £108 | £110 |

**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](mailto: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](mailto: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      |
| <b>GB Total</b>      | <b>5.8%</b>      | <b>2.6%</b> | <b>7.0%</b>          | <b>3.1%</b> | <b>7.4%</b>              | <b>3.5%</b> |
| <b>England Total</b> | <b>6.2%</b>      | <b>2.8%</b> | <b>7.3%</b>          | <b>3.3%</b> | <b>8.1%</b>              | <b>3.8%</b> |
| 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*