Great Britain Tourism Survey

September 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
September 2017				
	+22%	+12%	+17%	• There were 10.4 million domestic overnight trips in GB in September 2017, which is up from 8.5 million trips in September 2016. • Expenditure increased by +17% to £2.2 billion, while the number of nights increased by +12% to 31.0 million.
	+21%	+7%	+12%	• There were 8.4 million domestic overnight trips to England in September 2017, up by +21% on the same month last year. • Spend increased by +12% to £1.7 billion, while bednights increased by +7% to 24.3 million.
YEAR-TO-DATE				
	-1%	0%	+2%	• In the year to September 2017, GB trips were down -1% to 90.4 million, compared to 91.3 million in the same period in 2016. • Nights were at a similar level for the year-to-date at 280.3 million, while spend increased for the year to date by +2% at £18.3 billion.
	0%	+1%	+3%	• In the year to September 2017, trips to England were at a similar level to 2016, at 75.2 million. • Nights increased by +1% to 226.5 million, while spend increased by +3% for the year to date.

	Weather	Context
		• September started with dry sunny weather for many areas, but the month on the whole was unsettled. There were a higher than average number of rainy days for the month. Temperatures were close to the long-term average.

Summary of Results England

YEAR-TO-DATE (January-September 2017)

	Trips	Nights	Spend
	+5%	+6%	+6%
	-2%	+1%	+2%
	-8%	-10%	-4%

	25-34	55+	C2
	+8%	+5%	+4%

	North West	Yorkshire	North East
	+12%	+9%	+7%

Trip Characteristics

PURPOSE

- **HOLIDAY TRIPS** in England from January to September 2017 increased by +5% compared to the same period last year, with 37.9 million trips recorded.
- Expenditure increased by +6% to £8.9 billion, while nights increased by +6% to 130.9 million.

- **VISITS TO FRIENDS AND RELATIVES** decreased by -2% to 25.4 million, with bednights and expenditure increasing by +1% and +2% respectively. Non-holiday VFR trips were down by -3%, and holiday VFR trips were down by -1%.

- **BUSINESS** trips have decreased for the January to September period, down by -8% to 9.9 million. Nights and spend both decreased compared to the same period in 2016, by -10% and -4% respectively.

TRIP TAKERS

- 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 +5% for those aged 55+.
- The C2 social class group saw a +4% increase in trips taken between January to September compared to the same period in 2016, but all other groups saw a decrease.

DESTINATION TYPE

- North West, Yorkshire & the Humber, and North East saw the greatest increases in trips taken between January and September – trip taking increased by +12%, +9%, and +7% respectively compared to the same period in 2016.
- There was a decrease in trips to all destination types (seaside; large / city town; small town; countryside / village) for the January to September period compared to the same time in 2016.

Context Other Surveys

Overseas Travel by UK Residents

International Passenger Survey

	September 2017		Jan – September 2017	
	Trip	Spend	Trip	Spend
	0%	-2%	+3%	+4%

- In September, trips by Brits were at a similar level to September 2016, whilst expenditure on these trips decreased by -2%.
- In the year to date, overseas trips were up by +3%. Expenditure also increased, by +4%.

Other Tourism Surveys

OCCUPANCY

September 17	Room	Bedspace
	-1%	0%

- Room occupancy in England in September decreased by -1% compared to September 2016, at 84%, while bedspace occupancy was unchanged at 57%.

DAY VISITS

Jan-Sept 17	Volume	Spend
	-4%	-4%

- The number of tourism day visits in England in the period January to September 2017 decreased by -4% to 1.1 billion.
- The value of those visits decreased by -4% to £37.5 billion.

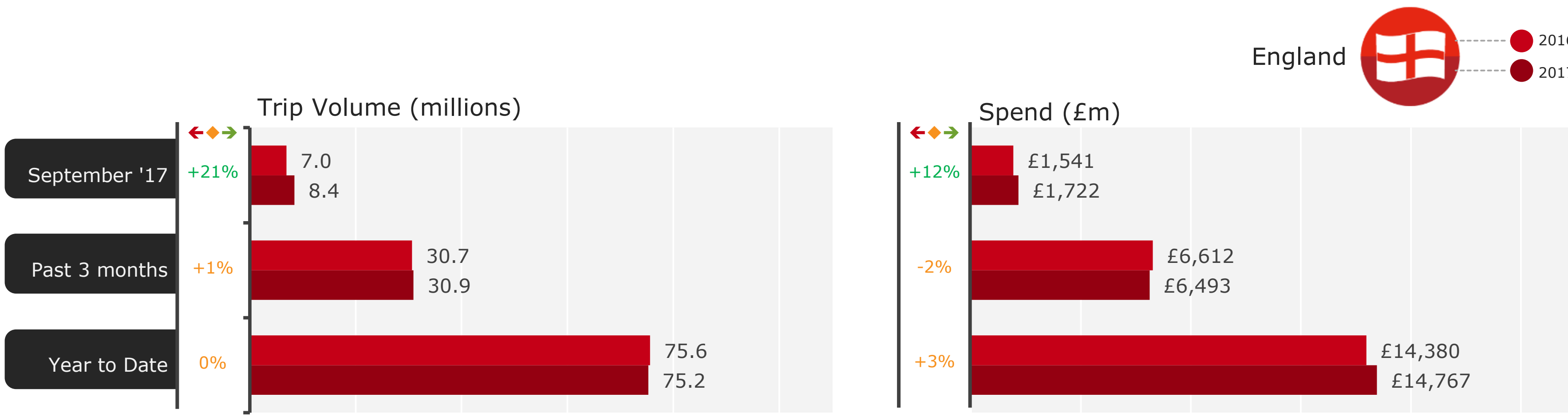
TOURISM BUSINESS MONITOR

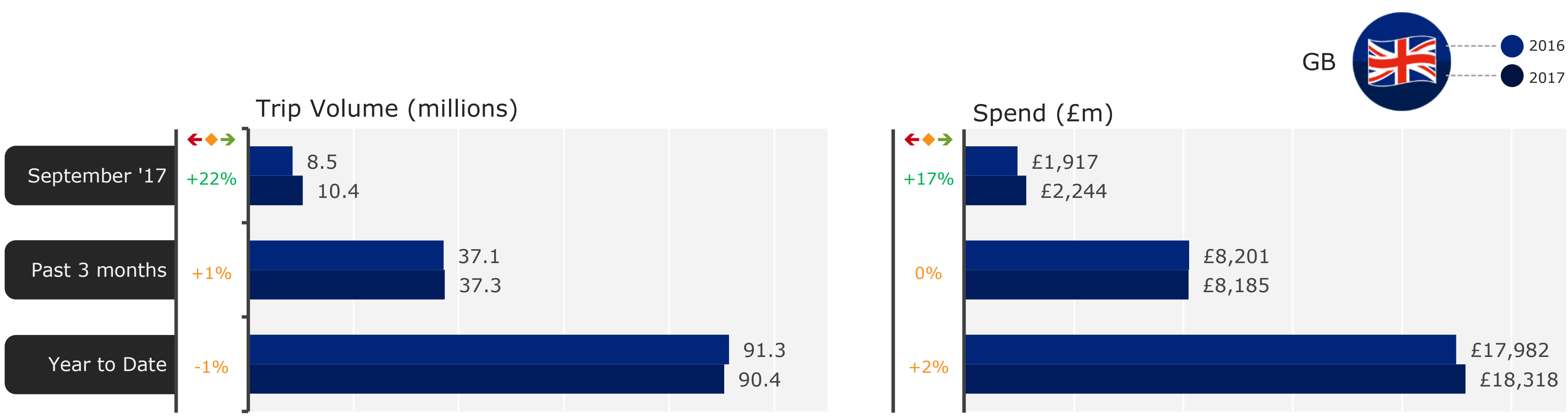
September 17	Attractions	Accommodation
	↗	↗

- 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)

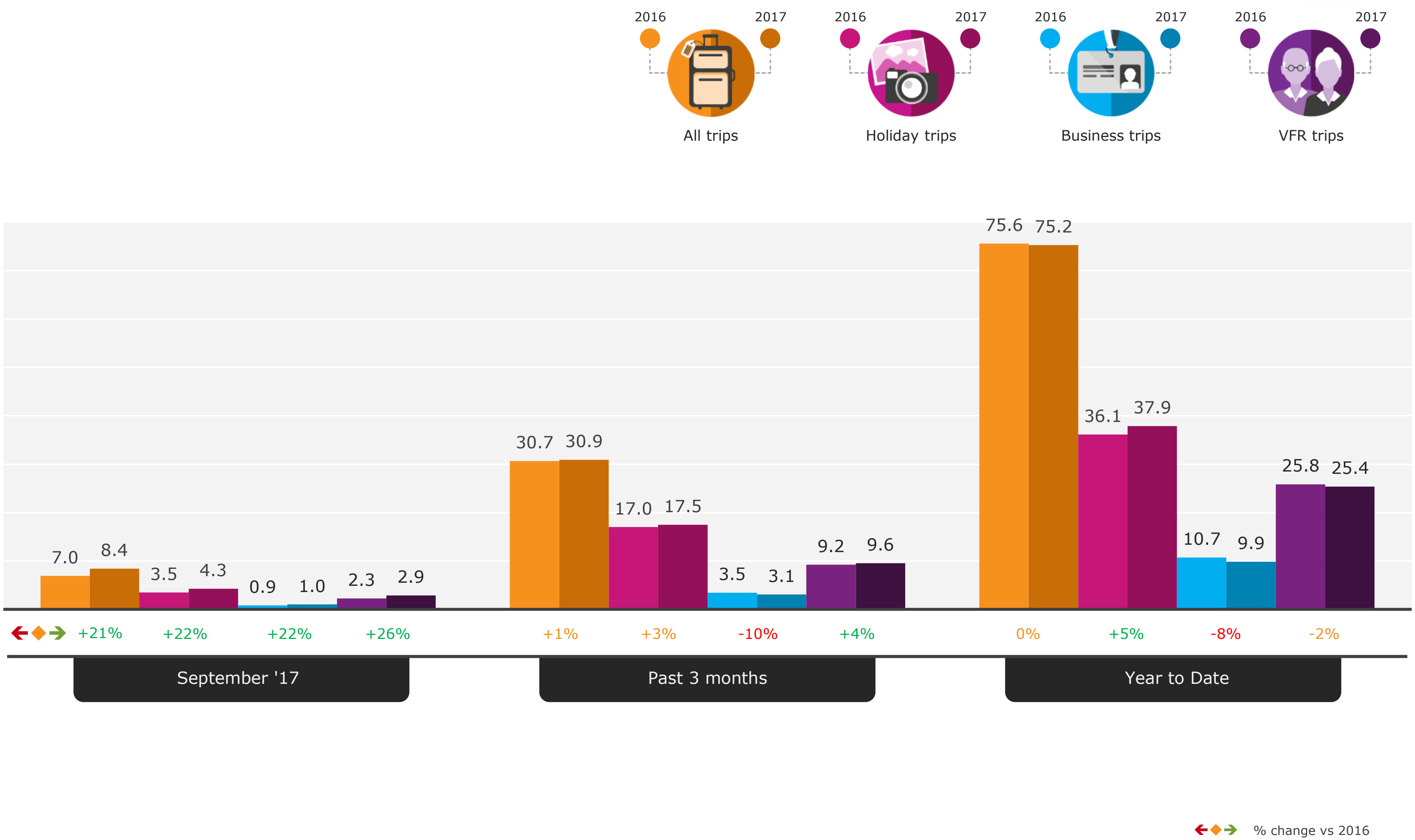




% change vs 2016

Trips England

Volume of trips (millions) (2016 vs 2017)



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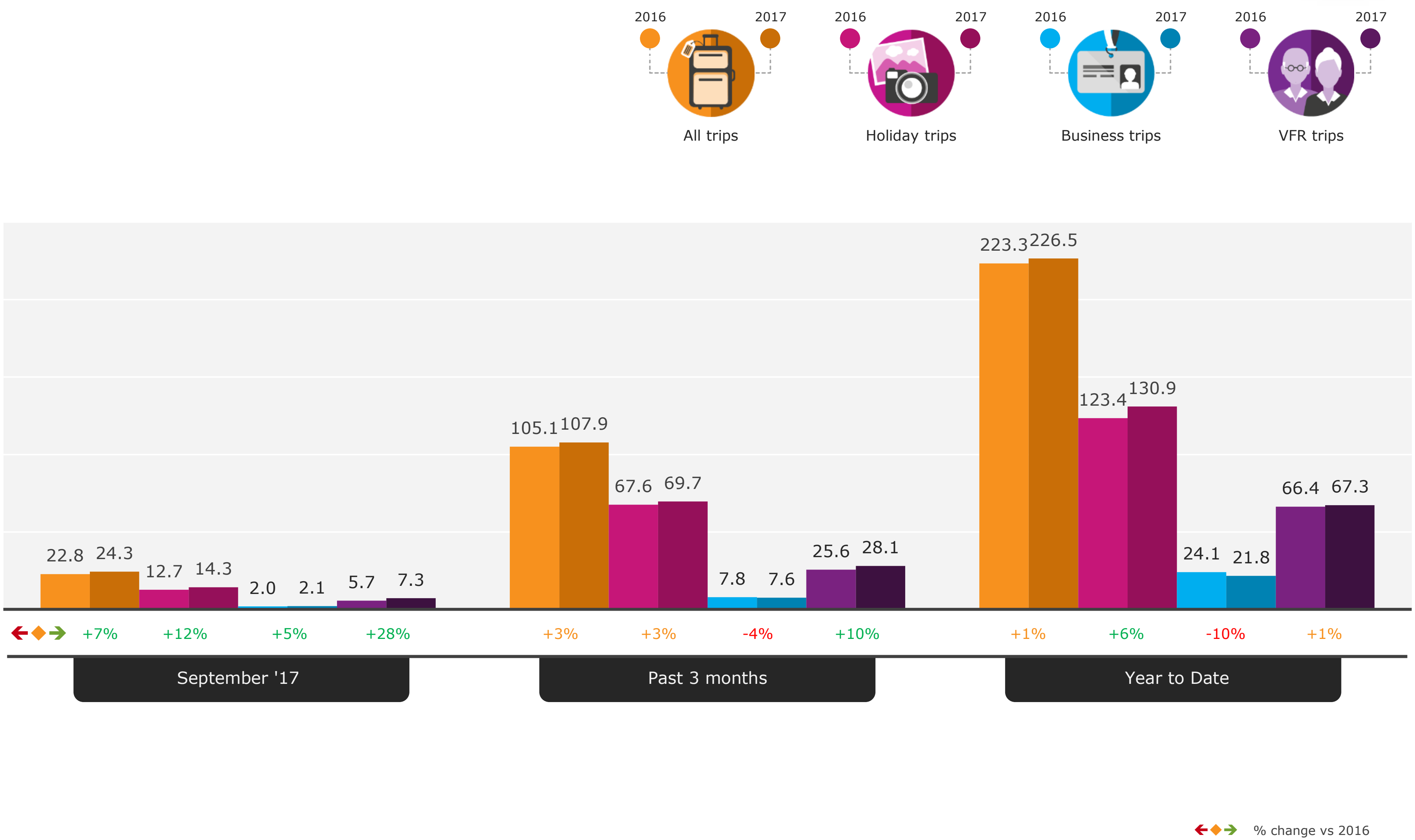
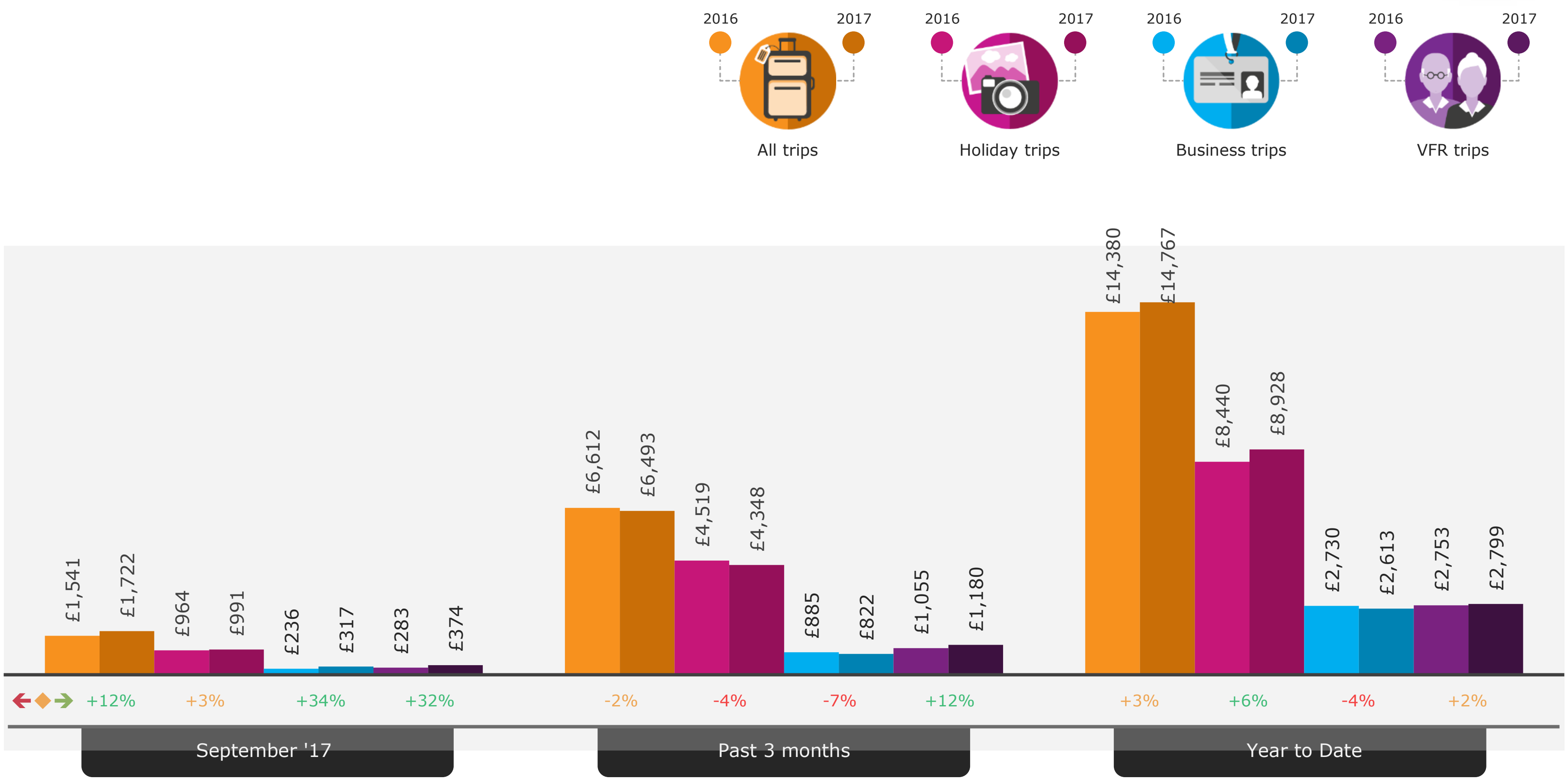
Nights England

Volume of nights (millions) (2016 vs 2017)



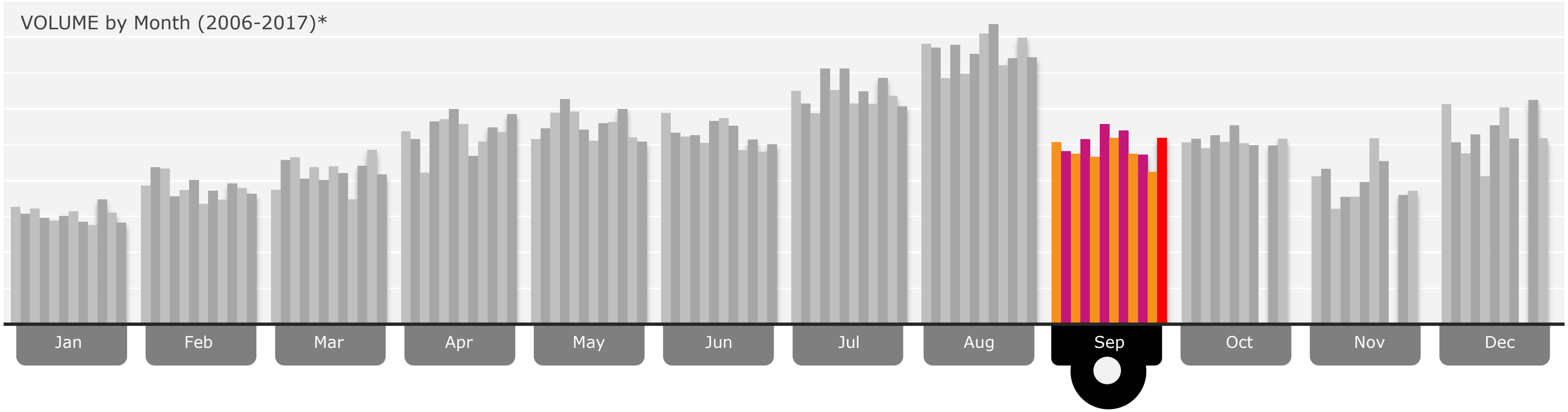
Spend England

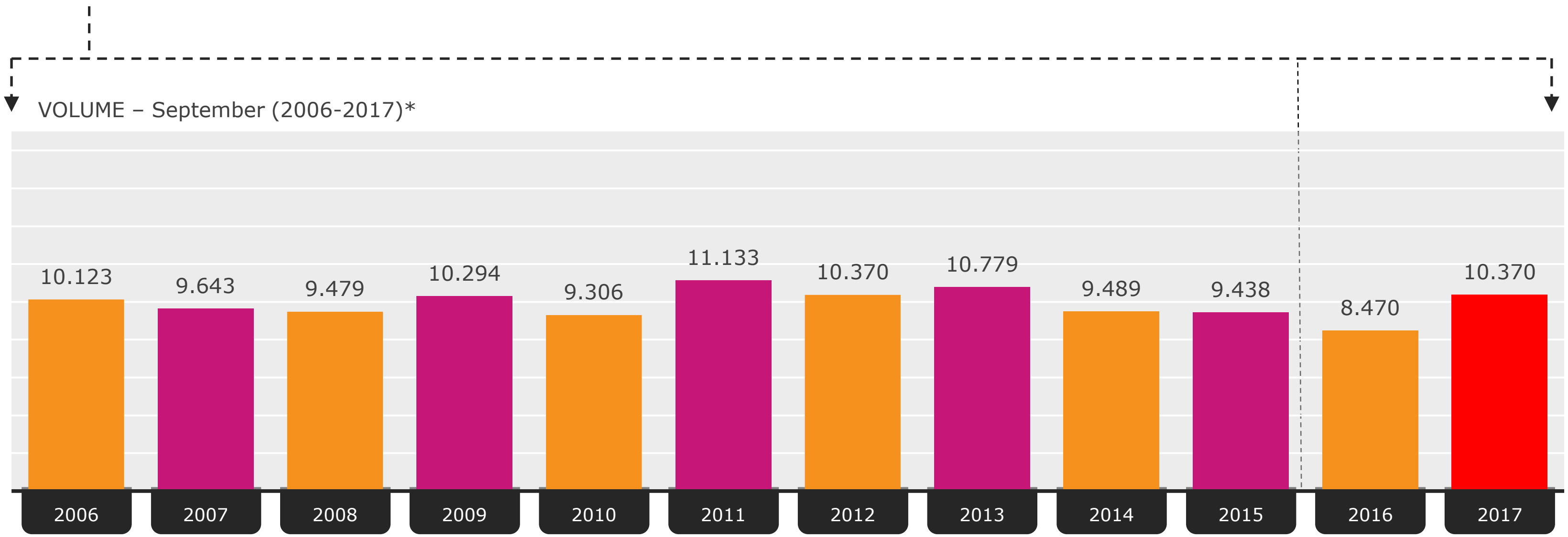
Expenditure (£m) (2016 vs 2017)



Long Term Trends by Month GB

2006-2017 (millions)*





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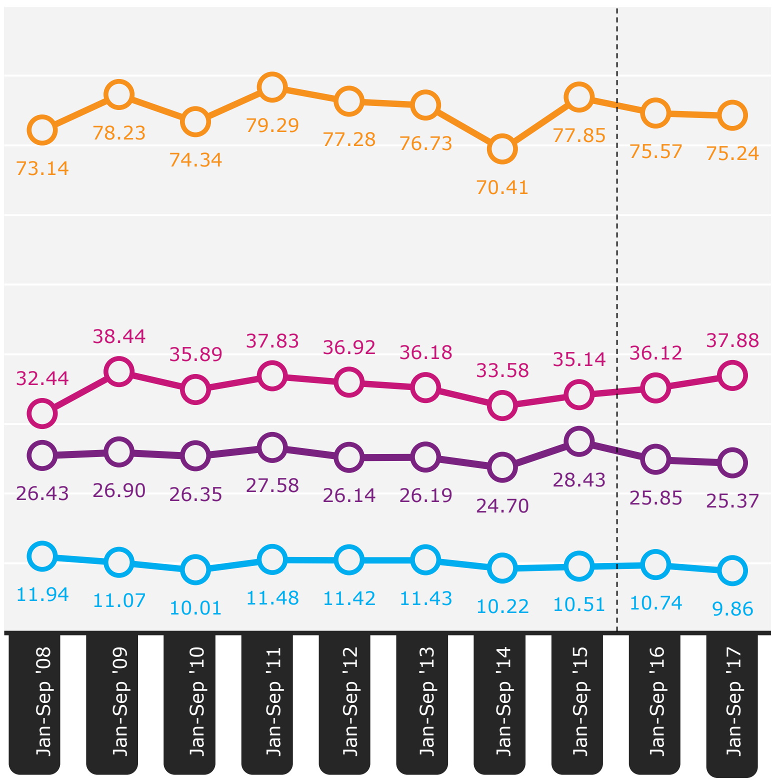
*Break in time series 2015-2016 – see slide 2

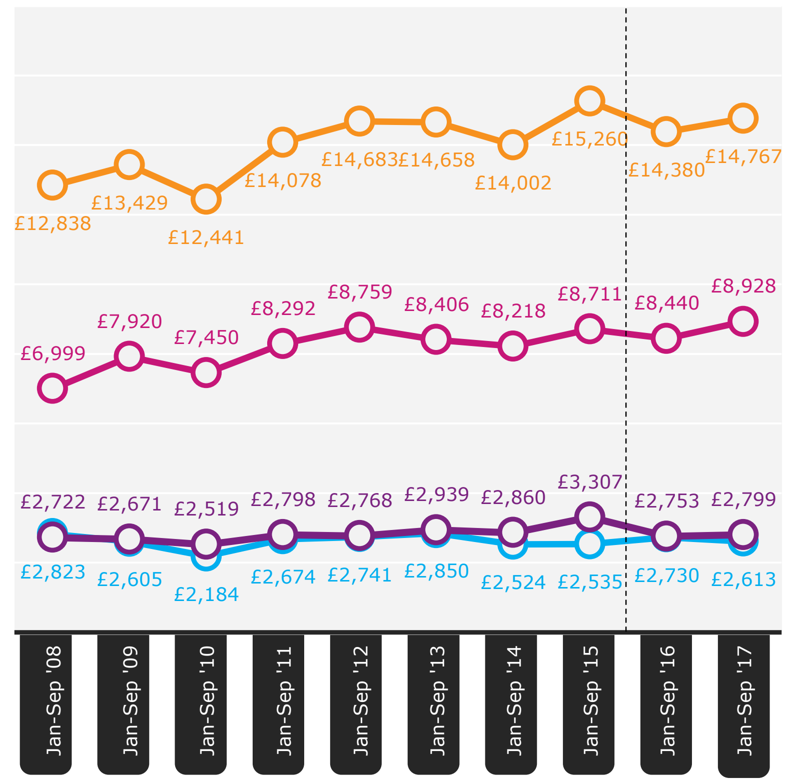
Long Term Trends, Year-to-Year England

All Trips | Holiday Trips | Business Trips | VFR Trips

Trip Volume (millions)*



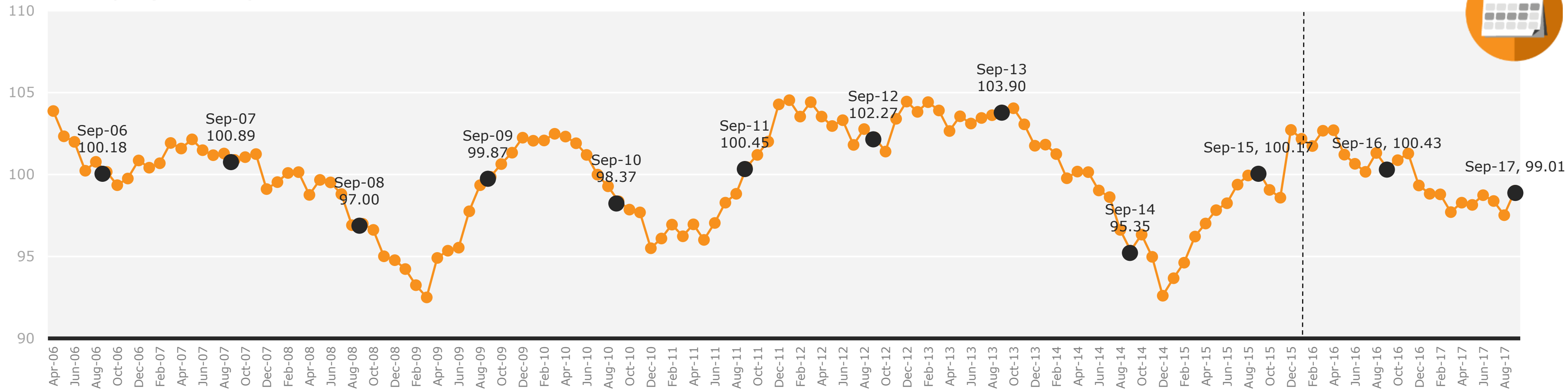
Spend (£m)*



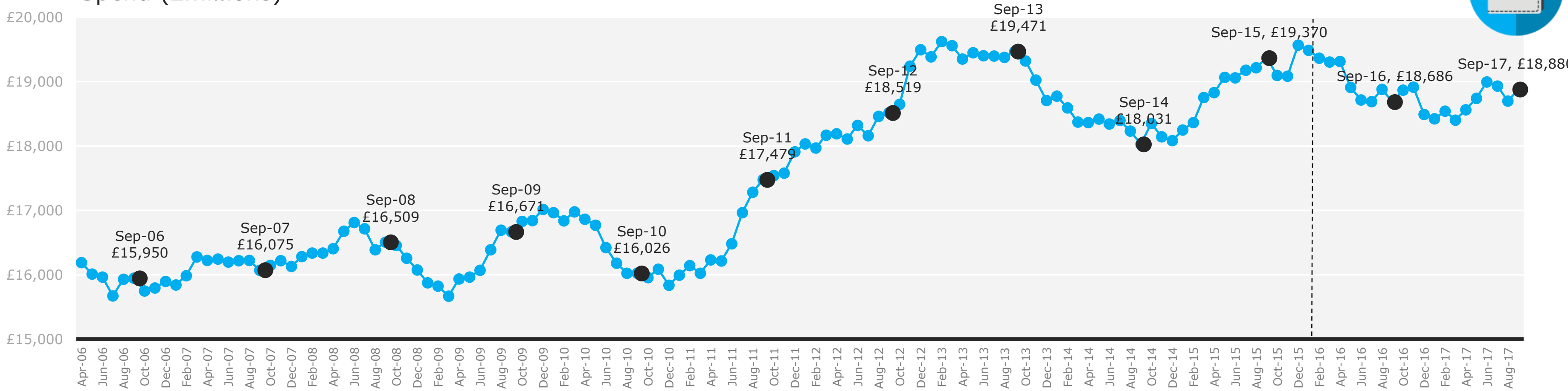
Rolling 12 Month Trendlines England

All trips and spend

All Trips (millions)*



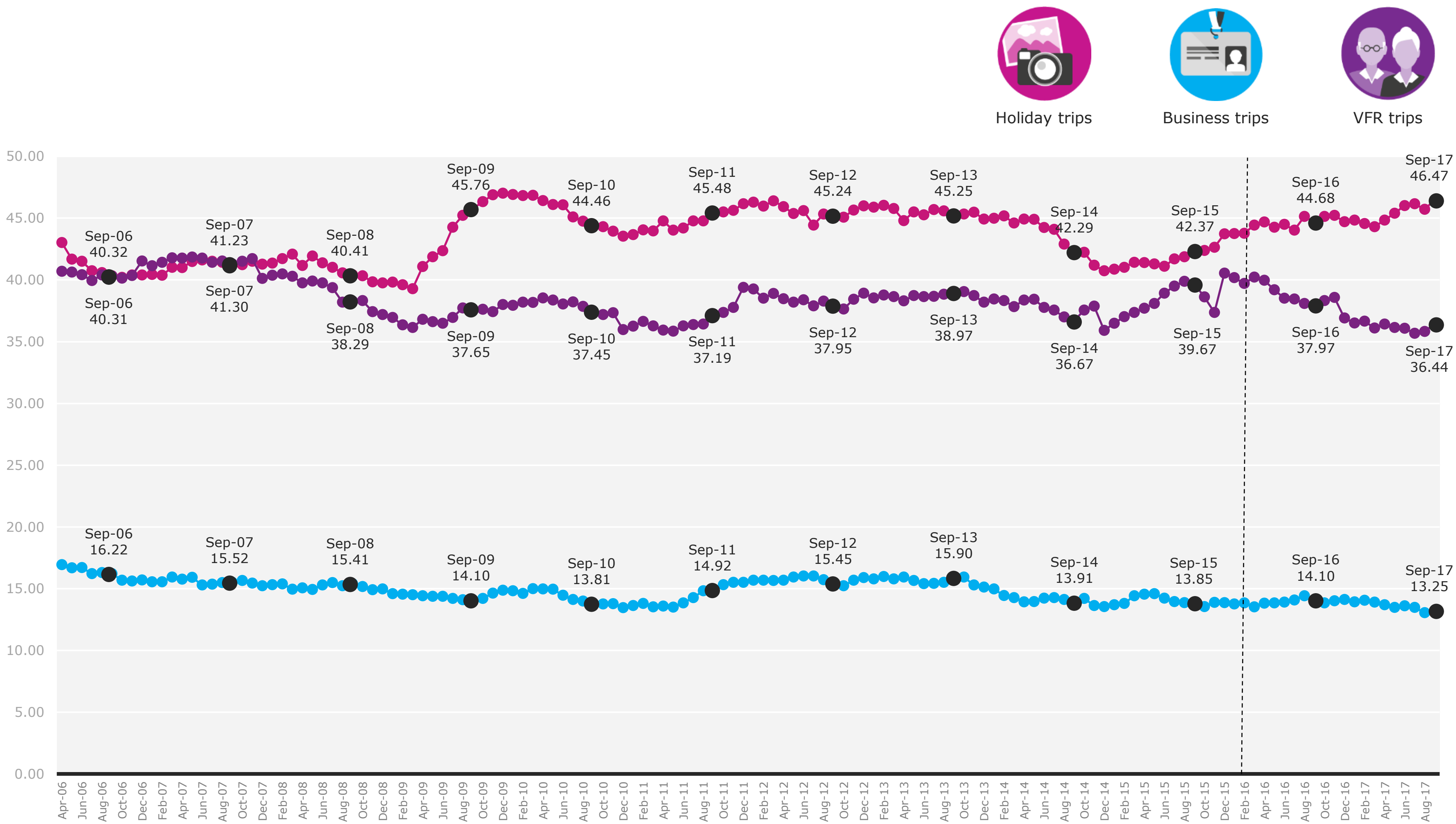
Spend (£millions)*



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

Rolling 12 Month Trendlines England

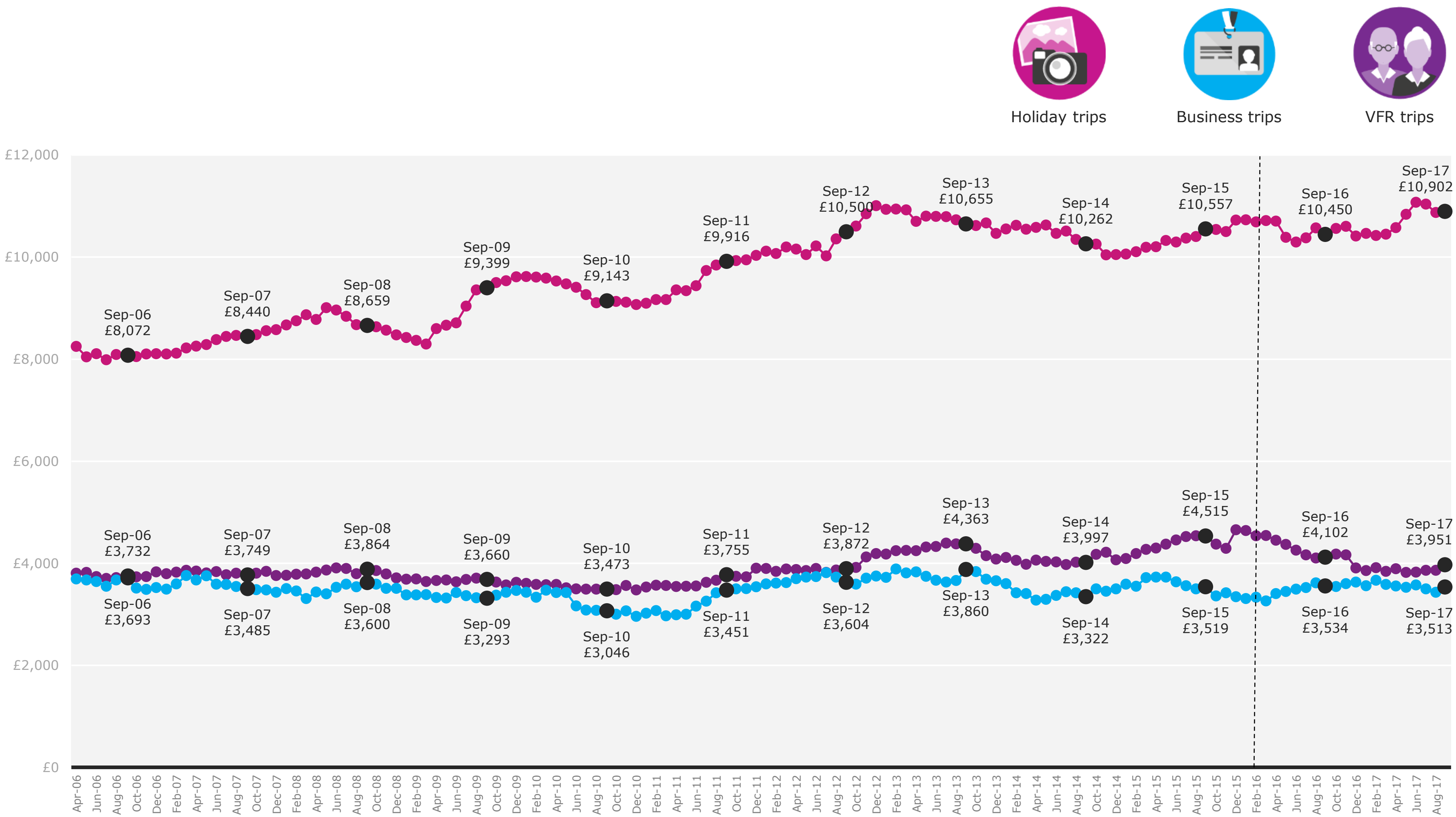
Trips by purpose (millions)*



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

Rolling 12 Month Trendlines England

Spend by purpose (£millions)*



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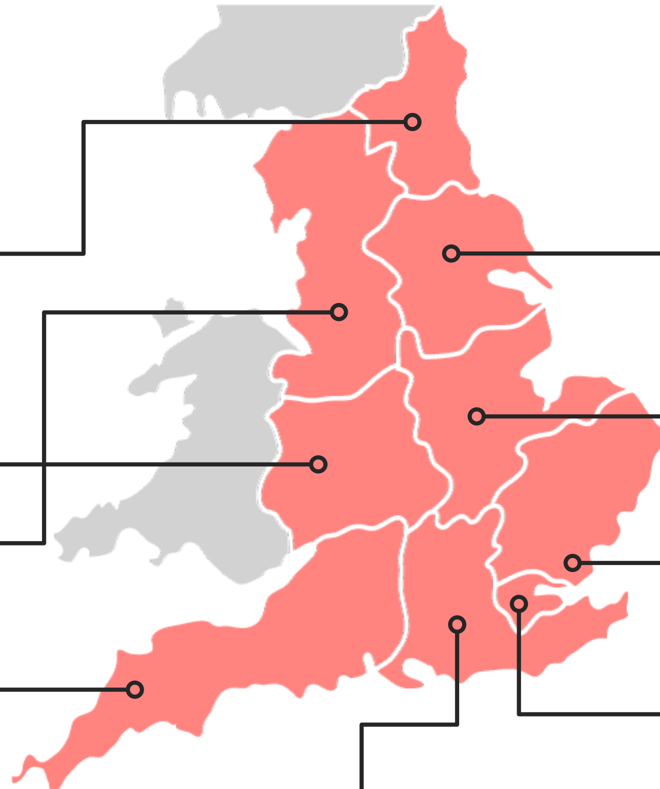
*Break in time series 2015-2016 – see slide 2

Regional Analysis England

Trip characteristics – region (YTD 2016 vs YTD 2017)



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

North East

YTD	2016	2017	Change
Trips (Millions)	2.5	2.7	+7%
Nights (Millions)	7.7	8.2	+6%
Spend (£ millions)	493	539	+9%

Yorkshire & Humberside

YTD	2016	2017	Change
Trips (Millions)	7.0	7.6	+9%
Nights (Millions)	21.4	21.8	+2%
Spend (£ millions)	1210	1323	+9%

North West

YTD	2016	2017	Change
Trips (Millions)	9.0	10.0	+12%
Nights (Millions)	23.8	27.3	+15%
Spend (£ millions)	1801	2042	+13%

East Midlands

YTD	2016	2017	Change
Trips (Millions)	5.6	5.7	+2%
Nights (Millions)	15.5	15.8	+2%
Spend (£ millions)	891	819	-8%

West Midlands

YTD	2016	2017	Change
Trips (Millions)	6.7	5.5	-18%
Nights (Millions)	16.0	12.7	-21%
Spend (£ millions)	1028	879	-14%

South West

YTD	2016	2017	Change
Trips (Millions)	16.0	16.3	+2%
Nights (Millions)	59.4	64.2	+8%
Spend (£ millions)	3427	3648	+6%

South East

YTD	2016	2017	Change
Trips (Millions)	14.0	11.9	-15%
Nights (Millions)	37.3	30.7	-18%
Spend (£ millions)	2273	2084	-8%

London

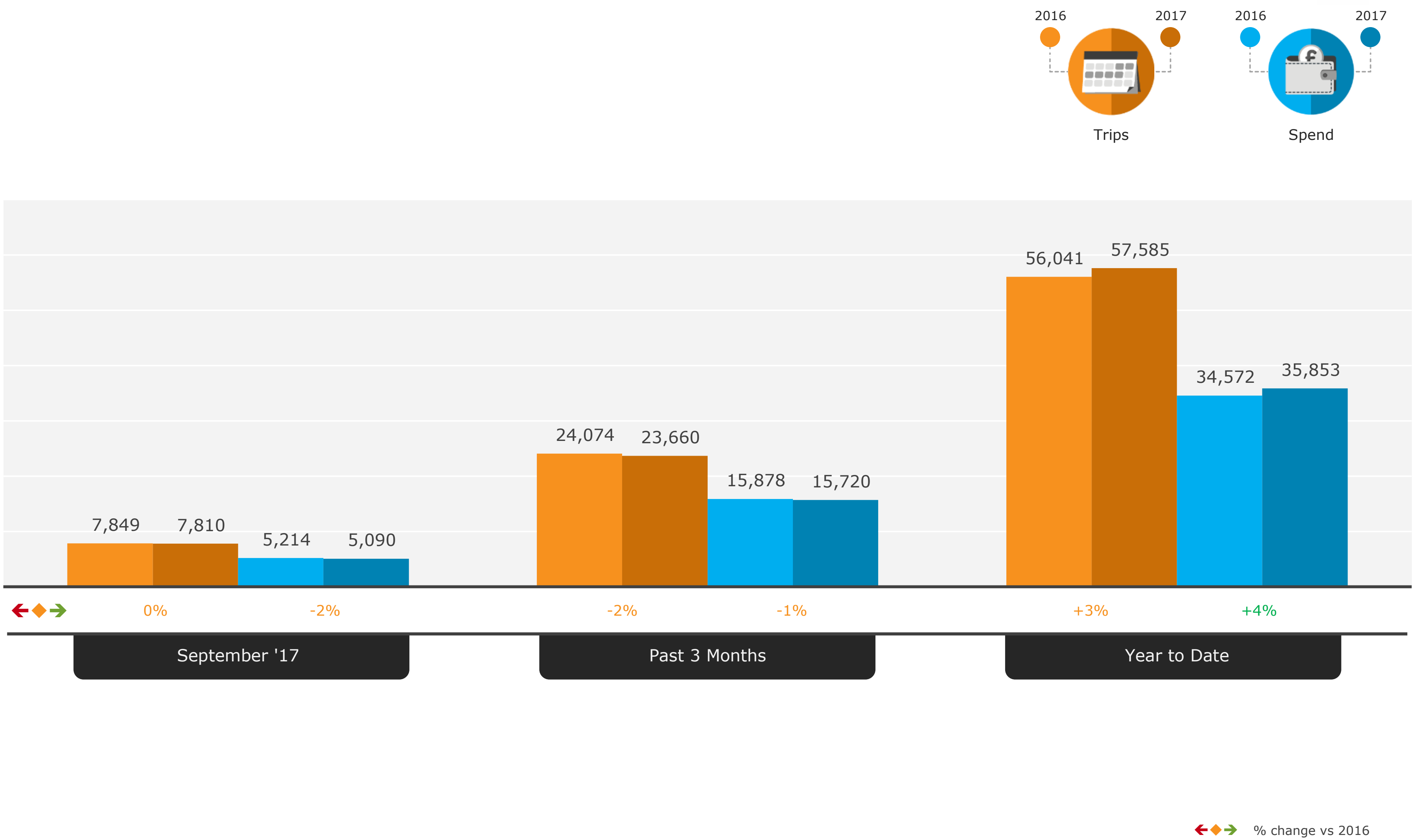
YTD	2016	2017	Change
Trips (Millions)	8.9	8.9	0%
Nights (Millions)	19.5	20.0	+2%
Spend (£ millions)	2046	2023	-1%

East

YTD	2016	2017	Change
Trips (Millions)	7.3	7.5	+3%
Nights (Millions)	22.3	25.1	+13%
Spend (£ millions)	1192	1371	+15%

UK Outbound Travel (International Passenger Survey)

Total volume (millions) and spend (£m)



Appendix: Domestic Tourism England

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

PURPOSE

		Pure Holiday	1-3 nights	+4 nights	VFR (on holiday)	Holiday (total)	VFR (non-holiday)	VFR (total)	Business
TRIPS Millions	2016	36.1	23.0	13.1	17.3	53.4	8.6	25.8	10.7
	2017	37.9	24.4	13.5	17.1	54.9	8.3	25.4	9.9
	% change	+5%	+6%	+3%	-1%	+3%	-3%	-2%	-8%
NIGHTS Millions	2016	123.4	47.1	76.4	46.6	170.0	19.8	66.4	24.1
	2017	130.9	46.9	84.1	48.3	179.2	19.0	67.3	21.8
	% change	+6%	0%	+10%	+3%	+5%	-4%	+1%	-10%
SPEND £Millions	2016	8440	4360	4080	1844	10285	906	2753	2730
	2017	8928	4487	4442	1899	10828	899	2799	2613
	% change	+6%	+3%	+9%	+3%	+5%	-1%	+2%	-4%
	Unwtd Trips	5489	3419	2072	2461	7951	1193	3654	1154

REGION

		WM West Midlands	E East of England	EM East Midlands	LDN London	NW North West	NE North East	SE South East	SW South West	YH Yorkshire & the Humberside
TRIPS Millions	2016	6.7	7.3	5.6	8.9	9.0	2.5	14.0	16.0	7.0
	2017	5.5	7.5	5.7	8.9	10.0	2.7	11.9	16.3	7.6
	% change	-18%	+3%	+2%	0%	+12%	+7%	-15%	+2%	+9%
NIGHTS Millions	2016	16.0	22.3	15.5	19.5	23.8	7.7	37.3	59.4	21.4
	2017	12.7	25.1	15.8	20.0	27.3	8.2	30.7	64.2	21.8
	% change	-21%	+13%	+2%	+2%	+15%	+6%	-18%	+8%	+2%
SPEND £Millions	2016	1028	1192	891	2046	1801	493	2273	3427	1210
	2017	879	1371	819	2023	2042	539	2084	3648	1323
	% change	-14%	+15%	-8%	-1%	+13%	+9%	-8%	+6%	+9%
	Unwtd Trips	760	1086	808	1168	1420	381	1653	2323	1115

% change vs 2016

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Appendix: Domestic Tourism England

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

LOCATION TYPE

		Seaside	Large City/Town	Small Town	Countryside /Village
TRIPS Millions	2016	19.1	30.3	14.3	13.1
	2017	18.7	30.0	14.2	12.9
	←◆→	-2%	-1%	-1%	-2%
NIGHTS Millions	2016	72.2	68.5	39.3	41.3
	2017	72.4	69.5	38.9	42.4
	←◆→	0%	+2%	-1%	+3%
SPEND £Millions	2016	4170	5633	2160	2262
	2017	4156	5797	2224	2383
	←◆→	0%	+3%	+3%	+5%
	Unwtd Trips	2795	4058	1960	1835

SOCIAL GRADE

		AB	C1	C2	DE
TRIPS 000s	2016	31.9	23.0	11.7	9.0
	2017	31.7	22.8	12.2	8.6
	←◆→	-1%	-1%	+4%	-5%
NIGHTS 000s	2016	90.9	65.6	37.1	29.7
	2017	89.7	68.8	39.0	29.0
	←◆→	-1%	+5%	+5%	-3%
SPEND £Millions	2016	6513	4209	2134	1522
	2017	6589	4445	2241	1490
	←◆→	+1%	+6%	+5%	-2%
	Unwtd Trips	3614	3367	1879	1726

AGE

		16-24	25-34	35-44	44-54	55+
TRIPS Millions	2016	8.1	12.9	15.8	15.4	23.4
	2017	7.6	13.9	14.9	14.3	24.5
	←◆→	-7%	+8%	-5%	-7%	+5%
NIGHTS Millions	2016	24.0	33.9	46.5	43.1	75.8
	2017	24.5	38.3	42.5	40.0	81.2
	←◆→	+2%	+13%	-9%	-7%	+7%
SPEND £Millions	2016	1379	2253	2809	3323	4612
	2017	1337	2666	2598	3116	5049
	←◆→	-3%	+18%	-8%	-6%	+9%
	Unwtd Trips	959	1905	1969	1734	4016

CHILDREN IN H/H

		Any	None
TRIPS 000s	2016	25.7	49.9
	2017	25.5	49.8
	←◆→	-1%	0%
NIGHTS 000s	2016	77.3	146.0
	2017	77.8	148.7
	←◆→	+1%	+2%
SPEND £Millions	2016	4274	10103
	2017	4315	10451
	←◆→	+1%	+3%
	Unwtd Trips	3690	6892

←◆→ % change vs 2016

Appendix: Domestic Tourism England

Trip characteristics (Year-To-Date: Jan-September 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	49.2	32.0	27.3	3.3	17.8	10.6	25.6	0.3	25.6
	2017	49.0	32.2	27.4	3.5	14.0	10.5	24.6	0.5	24.6
	←◆→	0%	+1%	+1%	+8%	-21%	-1%	-4%	+47%	-4%
NIGHTS Millions	2016	147.6	69.1	55.5	7.1	78.3	42.9	70.2	0.7	70.2
	2017	148.1	70.8	57.3	8.4	65.9	44.8	70.1	1.4	70.1
	←◆→	0%	+2%	+3%	+18%	-16%	+4%	0%	+90%	0%
SPEND £millions	2016	11848	8036	6759	712	4026	1594	2205	64	2205
	2017	12112	8180	6881	859	3660	1602	2172	105	2172
	←◆→	+2%	+2%	+2%	+21%	-9%	+1%	-1%	+64%	-1%
Unwtd Trips		6820	4389	3722	485	2097	1545	3506	66	3506

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

Appendix: Domestic Tourism England

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

All Tourism

	2012	2013	2014	2015	2016	2017
Trip Length	3.06	3.00	2.98	2.97	2.95	3.01
Spend Per Night	£62	£64	£67	£66	£64	£65
Spend Per Trip	£190	£191	£199	£196	£190	£196

Holidays

	2012	2013	2014	2015	2016	2017
Trip Length	3.57	3.49	3.43	3.49	3.42	3.46
Spend Per Night	£66	£67	£71	£71	£68	£68
Spend Per Trip	£237	£232	£245	£248	£234	£236

Business

	2012	2013	2014	2015	2016	2017
Trip Length	2.39	2.21	2.27	2.20	2.25	2.21
Spend Per Night	£101	£113	£109	£109	£113	£120
Spend Per Trip	£240	£249	£247	£241	£254	£265

VFR

	2012	2013	2014	2015	2016	2017
Trip Length	2.68	2.70	2.65	2.66	2.57	2.65
Spend Per Night	£40	£41	£44	£44	£41	£42
Spend Per Trip	£106	£112	£116	£116	£106	£110

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

GBTS September 2017 Published 9th January 2018

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

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	**5.1%**	**3.1%**	**5.6%**	**3.4%**	**6.4%**	**4.0%**
England Total	**5.6%**	**3.3%**	**6.0%**	**3.7%**	**6.9%**	**4.3%**
East	14.2%	8.6%	18.2%	10.8%	19.3%	12.4%
East Midlands	17.7%	9.9%	19.6%	12.7%	26.3%	14.8%
London	15.5%	8.8%	17.9%	9.8%	19.6%	13.2%
North East	21.5%	13.9%	24.6%	16.0%	26.4%	15.8%
North West	11.5%	7.3%	13.8%	9.7%	16.6%	10.5%
South East	11.0%	7.2%	13.6%	8.4%	14.5%	10.6%
South West	10.0%	6.5%	11.1%	7.2%	13.6%	8.8%
West Midlands	16.1%	10.5%	19.9%	13.9%	21.7%	15.1%
Yorks & Humb	14.1%	8.2%	16.4%	9.8%	18.1%	11.4%

Based on Quarter 3