

GB TOURISM SURVEY - April 2012

SUMMARY OF RESULTS

1. Headlines

- In the month of April, there were 11.2 million domestic tourism trips in Great Britain, a 7% decrease from 12.0 million in 2011.
- The number of bednights also decreased by 13%. However, spend actually saw an increase of 2% when compared with the same period last year.
- The same pattern emerged in England, whereby trips decreased by 9%, falling from 9.9 million in April 2011 to 9.0 million in April 2012. Total nights was also down by 15%, with spend up by 1%.
- Looking at year to date figures, the number of trips to Great Britain has declined by 3% and nights by 7%. However, spend is up 5% against the same period last year.
- Looking at the past 12 months, there were 8.3 million more trips taken in Great Britain compared with the same period the year before, an increase of 7%.

2. Trip Characteristics

- In the first four months of 2012, holiday trips in Great Britain decreased by 2% when compared with the same period last year, falling from 13.9 to 13.6 million (although this total is higher than in any other year between 2006 and 2010). Holiday nights also saw a decrease, falling by 7%. In line with the April picture, spend increased by 2%.
- Within holiday trips there was a decrease in the number of longer 4+ night breaks (down by 11%). The value of these holiday trips also fell by 16%. However, shorter holidays of 1-3 nights saw a small increase in trips (1%), with spend up by 14%.
- Visits to friends and family saw decreases in trips, nights and spend in the year to date, falling by 9%, 8% and 1% respectively.
- Business trips increased during the same period (by 5%), as did business nights and spend (rising by 6% and 17% respectively).
- While trip volumes in serviced accommodation were higher in 2012 than 2011 (+10%), fewer trips were taken in self-catering accommodation (-4%), with a particularly steep decline for camping and caravanning (-13%).
- Conditions in Great Britain for April were the wettest since records began in 1910. There were regional variations across Great Britain, with much of the rainfall focused on the South.

3. Overseas Travel by UK Residents

- In the year to April 2012, trips abroad by UK residents remained the same when compared with May '10 - April '11, with spend also remaining flat. Looking specifically at the month of April, outbound travel volumes increased slightly (by 2%) when compared with April 2011 whilst spend increased by 11% during the same period.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 48% for the month of April (1% lower than in April 2011). Room occupancy remained the same as April 2011, at 63%.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
April '12									
GB	12.0	11.2	-7%	37.4	32.6	-13%	2,043	2,087	+2%
England	9.9	9.0	-9%	30.1	25.5	-15%	1,645	1,663	+1%
Jan-Apr '12									
GB	34.0	32.9	-3%	93.0	86.5	-7%	5,469	5,744	+5%
England	28.4	27.6	-3%	76.0	70.5	-7%	4,447	4,722	+6%

Purpose of Trip – April 2012

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	6.2	5.6	-9%	21.2	17.9	-16%	1,308	1,231	-6%
Business	1.4	1.6	+13%	3.6	3.9	+9%	303	425	+40%
VFR	3.9	3.5	-12%	11.8	9.8	-17%	376	382	+2%
England									
Holiday	4.9	4.4	-10%	16.5	13.6	-18%	1,018	980	-4%
Business	1.3	1.3	+2%	3.1	3.3	+4%	266	342	+29%
VFR	3.4	2.9	-13%	9.8	7.9	-19%	315	301	-4%

Purpose of Trip – Year to Date (January – April 2012)

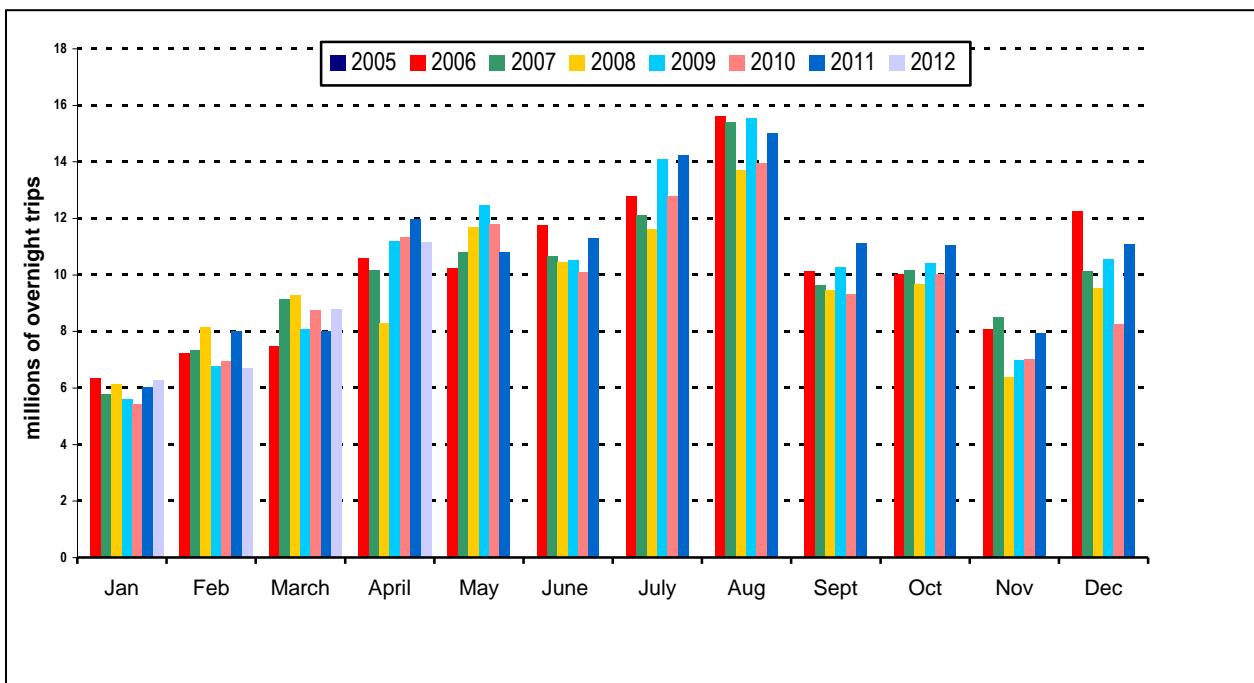
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	13.9	13.6	-2%	41.5	38.7	-7%	2,822	2,878	+2%
Business	5.6	5.9	+5%	12.4	13.1	+6%	1,228	1,442	+17%
VFR	13.2	12.1	-9%	34.4	31.7	-8%	1,246	1,229	-1%
England									
Holiday	11.1	10.9	-2%	32.1	30.1	-6%	2,193	2,318	+6%
Business	4.8	5.0	+4%	10.6	11.2	+6%	1,050	1,208	+15%
VFR	11.5	10.6	-8%	29.4	26.8	-9%	1,059	1,032	-3%

Outbound Travel – UK Residents

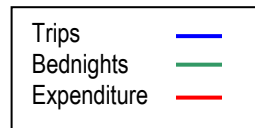
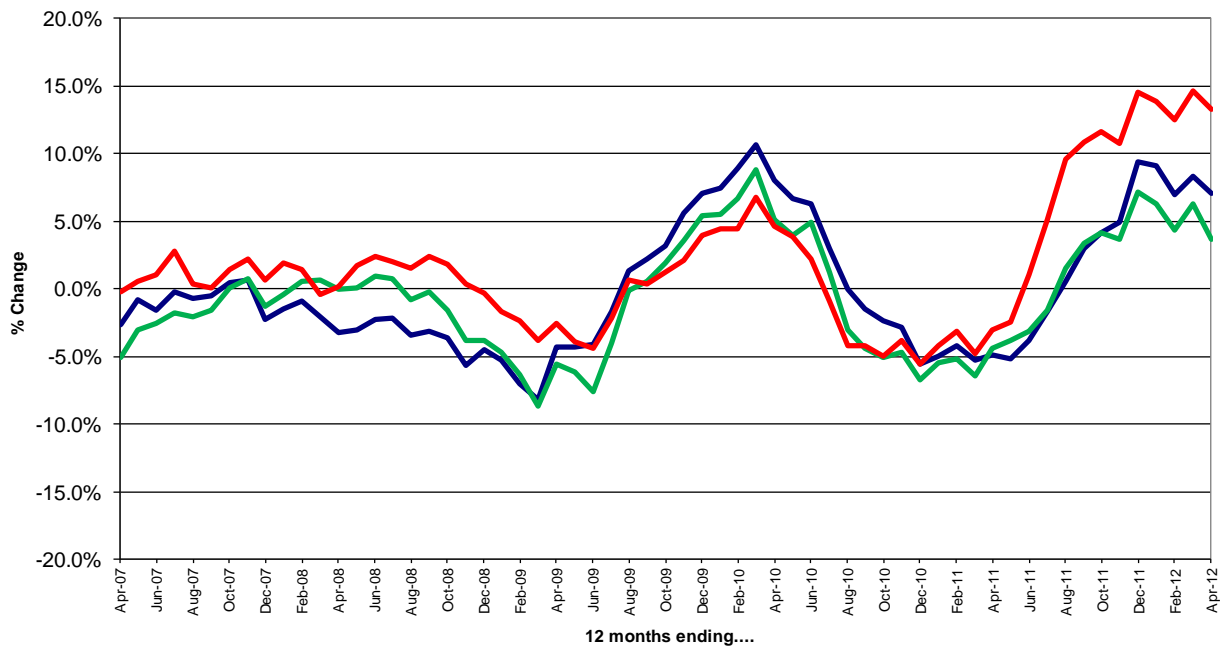
	TRIPS (MILLIONS)			SPEND (£BN)		
	2011	2012	% +/-	2011	2012	% +/-
April	4.8	4.9	+2%	2.4	2.7	+11%
January-April	15.0	15.1	0%	8.3	8.6	+4%
May '11 – April '12	56.1	56.1	0%	31.5	31.3	0%

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 (April 2011 vs. April 2012)
- Year to date (January–April 2011 vs. January– April 2012)
- 12 month rolling (May 2010 – April 2011 vs. May 2011– April 2012)

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.

