GB TOURISM SURVEY - February 2012
SUMMARY OF RESULTS

1. Headlines

- In February, there were 6.7 million domestic overnight tourism trips in Great Britain, a 16% decrease from 8.0 million in February 2011. There was also a sharp decrease in nights, with bed nights falling from 20.1 million in February 2011 to 14.9 million in February 2012, a decline of 26%.
- Spend also saw a decline, but not quite as sharply, falling from £1.2 billion in February 2011 to £1.1 billion in February this year, representing a decline of 8%.
- Looking at England alone, a similar picture emerged for trips, nights and spend. There were 5.7 million trips in England in February 2012, a 15% decrease from 6.7 million in 2011. Nights also declined by 24%, and spend declined by 6%.
- Looking at year to date figures, the number of trips to Great Britain declined by 7%, as did nights, which saw a decline of 15%. However, spend remained static, at £2.1 billion.
- In the last 12 months to February 2012 there were 8.2 million more trips taken than in the same period the year before.

2. Trip Characteristics

- In the first two months of 2012, trip volumes in Great Britain decreased for holidays and visits to friends and relatives compared with the same period last year.
- The number of holiday trips was down by 3%, falling to 4.3 million, but while slightly more short holiday trips were taken this year than last, the number of 4+ night breaks fell back by 24%, leading to an overall reduction in holiday nights of 9%. Positively though, spend has held up at 3% above the 2012 figure.
- Visits to friends and relatives were down by 16%, falling to 5.4 million, with a proportionate reduction in nights, down 17%.
- Business travel continued the growth seen through much of 2012, with an increase of 4% in trip numbers compared to the first two months of last year, rising to 2.8 million, as well as increased nights (+9%) and spending (+5%).
- In the first two months of the year, trips to small towns performed below average when compared to other location types, decreasing by 16% for trips and 12% for spend. Trips to the countryside performed better, with spend showing above average performance compared to other location types, the only location not to show a decline for spend in this period (increasing by 21%).
- The number of trips taken by those with children also saw a decline when compared to the same period last year, falling by 15%, whereas trips taken by households without children fell back by just 4%.
- Although temperatures in Great Britain were around average overall in February, the first part of the month was unusually cold. It is also worth noting that February 2011 was a good month for tourism with a greater number of trips taken when compared with the previous two years.

3. Overseas Travel by UK Residents

- From March 2011 to February 2012, there was just a 1% increase in trips abroad compared to 2011 leaving levels 19% lower than in the peak year of 2008. Spend decreased slightly, by 2%. The month of February saw a 4% increase in outbound trip volumes compared to 2011.

4. Other Tourism Surveys

- The England Occupancy survey showed that room occupancy levels in February 2012 witnessed a slight drop when compared with February 2011, from 59% to 57%. Bedspace occupancy remained the same when compared with the previous year (at 42%).

KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
February '12									
GB	8.0	6.7	**-16%**	20.1	14.9	**-26%**	1,215	1,117	**-8%**
England	6.7	5.7	**-15%**	16.4	12.4	**-24%**	981	918	**-6%**
Jan-Feb '12									
GB	14.0	13.0	**-7%**	34.9	29.5	**-15%**	2,138	2,134	**0%**
England	11.8	11.1	**-6%**	29.0	24.7	**-15%**	1,736	1,795	**+3%**

Purpose of Trip – February 2012

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	2.7	2.4	**-14%**	7.3	5.4	**-26%**	552	481	**-13%**
Business	1.4	1.4	**-3%**	2.7	2.7	**-2%**	310	314	**+1%**
VFR	3.6	2.7	**-23%**	8.7	6.3	**-27%**	316	268	**-15%**
England									
Holiday	2.2	1.9	**-15%**	5.6	4.4	**-22%**	416	372	**-11%**
Business	1.2	1.2	**0%**	2.2	2.3	**+3%**	260	276	**+6%**
VFR	3.1	2.4	**-24%**	7.4	5.3	**-29%**	279	220	**-21%**

Purpose of Trip – Year to Date (January - February 2012)

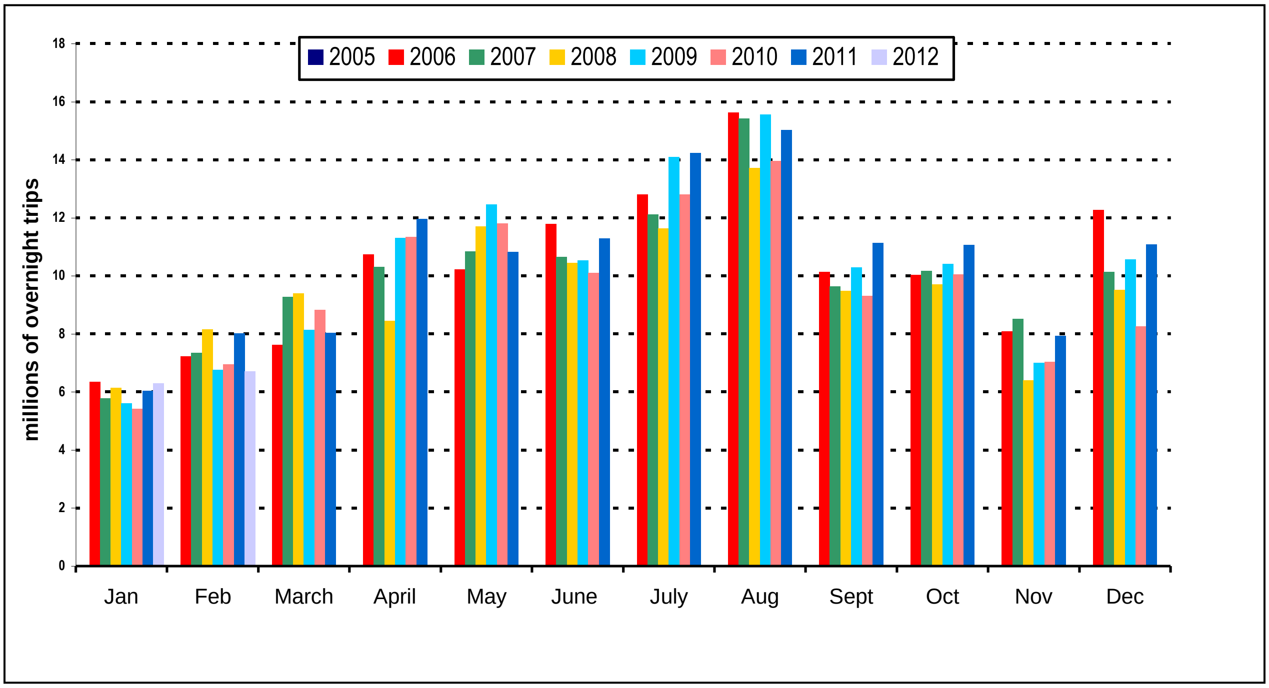
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	4.4	4.3	**-3%**	11.2	10.1	**-9%**	878	900	**+3%**
Business	2.7	2.8	**+4%**	5.5	6.0	**+9%**	606	633	**+5%**
VFR	6.4	5.4	**-16%**	14.9	12.4	**-17%**	570	511	**-10%**
England									
Holiday	3.6	3.4	**-5%**	8.7	8.1	**-7%**	681	717	**+5%**
Business	2.3	2.4	**+8%**	4.6	5.3	**+15%**	493	565	**+15%**
VFR	5.6	4.8	**-15%**	12.8	10.5	**-18%**	492	431	**-12%**

Outbound Travel – UK Residents

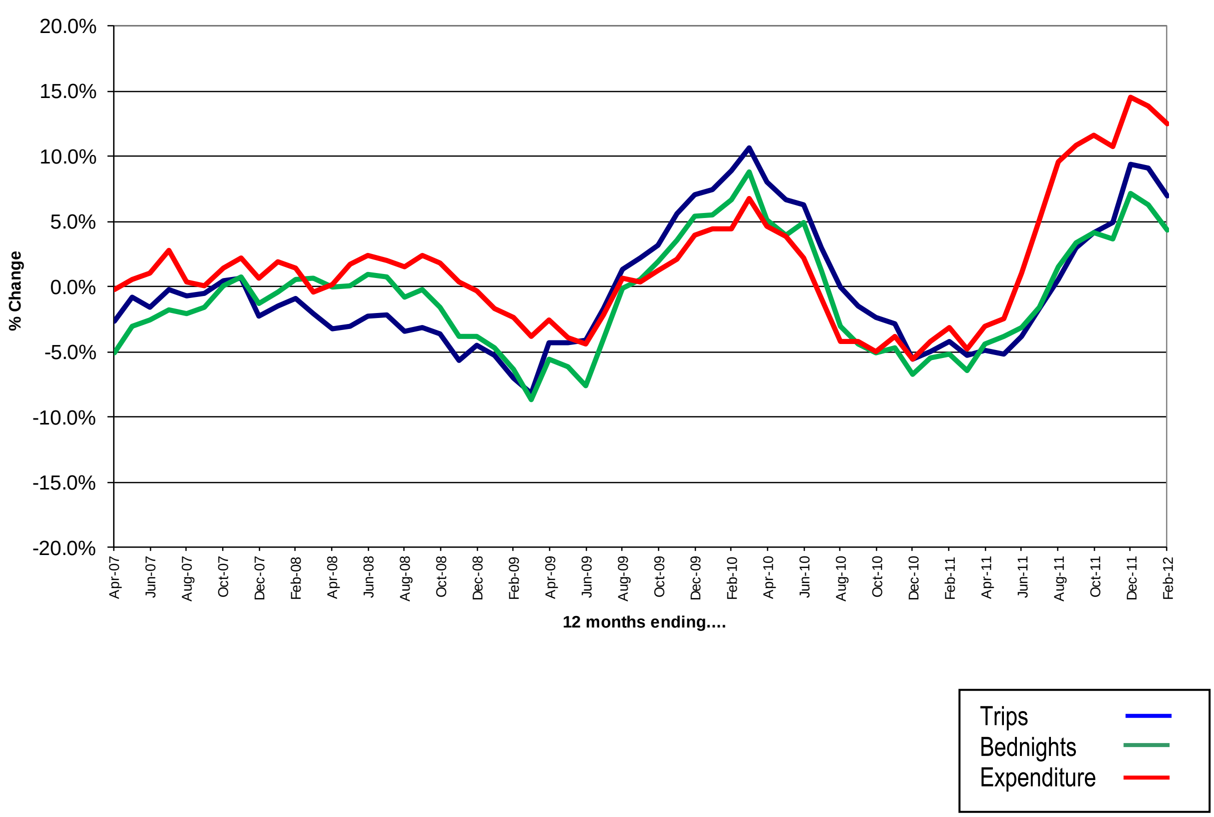
	TRIPS (MILLIONS)			SPEND (£BN)		
	2011	**2012**	**% +/-**	**2011**	**2012**	**% +/-**
February 2012	3.2	3.3	**+4%**	1.9	1.9	**+3%**
Jan – Feb '12	6.6	6.6	**-1%**	3.8	3.8	**0%**
Mar '11 – Feb '12	55.6	55.9	**+1%**	31.7	31.0	**-2%**

TREND CHARTS

GB All Trips – Domestic Trip Volume by Month



GB All Trips - Annual Percentage Change



Year on Year Comparison, by Trip Characteristic

VisitEngland

Important Note

The analysis on the following page shows year-on-year comparisons across a number of trip characteristics, considering:

- Month (February 2011 vs February 2012)
- Year to date (January - February 2011 vs January – February 2012)
- 12 month rolling (March 2010 – February 2011 vs March 2011 – February 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.

YEAR-ON-YEAR COMPARISON, BY TRIP CHARACTERISTIC

GBTS: Comparisons with equivalent periods, 2011

LEGEND: Above Average Performance | Average Performance | Below Average Performance

NOTE: In the tables below, 'average performance' refers to the total trips/nights/expenditure to either GB or England in each time period. Those cells marked 'above average performance' indicate where the percentage change is more than 5 percentage points above the average; those marked 'below average performace' indicate where the percentage change is more than 5 percentage points below the average. These changes are not necessarily statistically significant - they only indicate those cells where changes are further away from the average. The numbers of unweighted trips are also displayed to indicate where sample sizes are relatively small. Where there are 75 or fewer unweighted trips, the % change figures have been 'greyed out' to indicate that they should be treated with caution.

Great Britain

	Month: February 2012			Unweighted	YTD: January - February 2012			Unweighted	12 month rolling March 2011 - February 2012			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	-16.2%	-25.8%	-8.1%	927	-7.3%	-15.3%	-0.2%	1802	7.0%	4.2%	12.5%	17640
PURPOSE:												
Pure Holiday	-13.9%	-25.8%	-12.9%	327	-2.9%	-9.3%	2.5%	594	5.7%	4.6%	11.8%	8504
- 1-3 nights holiday	-2.1%	-9.5%	-5.0%	272	3.2%	-0.9%	6.9%	480	7.5%	6.3%	10.4%	5195
- 4+ nights holiday	-47.9%	-43.0%	-33.1%	55	-23.6%	-19.3%	-9.5%	113	2.7%	3.7%	13.2%	3308
VFR (on holiday)	-2.7%	-14.6%	-5.1%	220	-2.6%	-12.7%	-11.2%	427	12.2%	7.5%	9.5%	3491
HOLIDAY (TOTAL)	-10.0%	-21.6%	-11.3%	547	-2.8%	-10.7%	-1.0%	1021	7.5%	5.3%	11.4%	11995
VFR (non-holiday)	-37.9%	-39.9%	-25.2%	185	-26.4%	-21.3%	-9.4%	383	-1.0%	-0.9%	8.4%	2990
VFR (TOTAL)	-23.1%	-27.1%	-15.2%	405	-15.7%	-16.8%	-10.4%	810	5.6%	3.8%	9.0%	6481
Business	-3.0%	-1.5%	1.3%	159	3.9%	8.9%	4.5%	331	11.6%	9.6%	16.5%	2136
Regions:												
West Midlands	-32.3%	-37.6%	-25.6%	59	-12.9%	-17.6%	-9.9%	120	0.8%	-9.6%	1.1%	1130
East of England	-31.6%	-29.1%	-4.2%	64	-20.2%	-20.1%	38.7%	132	11.5%	8.5%	19.0%	1429
East Midlands	-6.9%	-37.2%	-20.9%	64	-7.2%	-25.7%	-10.2%	127	13.1%	6.2%	18.6%	1258
London	-9.0%	-37.7%	-5.9%	107	1.9%	-14.8%	2.2%	214	-0.9%	6.1%	-0.6%	1505
North West	9.8%	10.4%	23.3%	127	8.8%	6.8%	14.4%	228	11.7%	8.1%	17.2%	1971
North East	-14.5%	-11.4%	5.1%	35	14.2%	13.5%	15.0%	77	22.2%	20.6%	21.4%	626
South East	-0.7%	-29.2%	-2.3%	144	5.0%	-7.5%	14.9%	282	6.0%	2.7%	17.8%	2364
South West	-26.1%	-20.1%	-26.9%	114	-17.6%	-16.2%	-16.9%	220	1.8%	0.3%	7.9%	2884
Yorkshire & the Humber	-15.4%	-24.9%	-13.1%	79	-11.3%	-37.2%	-0.6%	148	11.9%	6.3%	11.5%	1578
LOCATION TYPE:												
Seaside	-12.7%	-13.3%	-14.0%	128	-1.0%	0.4%	-2.0%	223	6.3%	7.9%	10.6%	3801
Large city/ large town	-21.2%	-30.5%	-10.8%	431	-5.2%	-17.1%	-1.3%	880	7.3%	3.2%	11.9%	6680
Small town	-8.9%	-26.5%	-10.5%	230	-15.7%	-21.8%	-11.7%	444	5.6%	0.4%	9.2%	4156
Countryside/ village	-15.3%	-22.4%	11.0%	149	-1.9%	-10.7%	21.4%	278	10.5%	5.2%	20.1%	3389
AGE:												
16-24	-5.2%	-30.4%	27.6%	158	-4.8%	-27.1%	10.0%	293	0.9%	-7.1%	13.7%	2128
25-34	-13.9%	-5.9%	-14.0%	166	-5.4%	-12.2%	-6.9%	302	3.8%	9.5%	6.0%	2860
35-44	-30.4%	-38.7%	-27.9%	187	-16.7%	-26.2%	-18.8%	362	6.9%	-0.3%	10.7%	3815
45-54	-14.1%	-26.5%	-5.8%	164	-6.2%	-5.8%	6.3%	328	6.4%	6.4%	12.9%	3081
55+	-11.5%	-21.4%	2.5%	253	-2.0%	-6.8%	15.0%	517	12.2%	8.7%	16.6%	5755
SEG:												
AB	-20.1%	-25.6%	-18.4%	319	-11.2%	-19.1%	-9.1%	630	6.8%	2.7%	11.6%	5808
C1	-13.1%	-29.7%	1.2%	305	-7.1%	-17.3%	1.8%	573	11.0%	9.2%	17.4%	5571
C2	-8.5%	-28.2%	-2.2%	146	7.3%	-10.0%	13.0%	292	4.7%	0.7%	8.4%	3107
DE	-20.1%	-12.8%	12.9%	157	-11.7%	-5.3%	22.0%	307	1.5%	2.3%	8.9%	3153
CHILDREN IN H/H:												
Any	-24.2%	-33.0%	-25.4%	295	-14.5%	-20.3%	-14.1%	552	3.1%	-1.6%	6.5%	6328
None	-12.7%	-22.8%	-0.8%	633	-4.4%	-13.3%	5.4%	1250	8.9%	7.2%	15.0%	11312
ACCOMMODATION:												
Commercial accom	-9.7%	-23.0%	-8.4%	526	0.2%	-9.3%	2.6%	996	7.1%	4.9%	11.7%	10296
- Serviced accom	-6.9%	-13.8%	-7.6%	449	2.6%	3.9%	4.2%	859	8.3%	5.3%	11.7%	6885
- Hotel/motel/guesthouse	-8.7%	-18.5%	-11.5%	409	-0.1%	-3.5%	-0.8%	782	8.9%	6.2%	12.2%	6125
- Bed & Breakfast	12.7%	28.8%	41.7%	35	40.0%	91.9%	79.5%	69	4.4%	1.5%	6.2%	697
Total self-catering rented	-19.5%	-17.0%	-24.2%	61	-13.0%	-11.2%	-5.7%	103	4.9%	6.0%	13.3%	3153
-Camping & Caravanning (inc. owned caravans)	-16.5%	-46.6%	-15.0%	21	-33.6%	-49.0%	-27.6%	27	3.0%	3.2%	11.6%	2367
-Other self-catering rented	-14.5%	-7.2%	-24.3%	47	1.5%	2.9%	-2.6%	83	9.8%	10.6%	16.4%	1283
Hostels	-25.7%	-15.8%	113.3%	11	-20.8%	-22.3%	24.3%	21	-16.7%	-7.1%	-13.8%	171
Own home/friends'/relatives'	-21.9%	-28.1%	-5.6%	395	-14.2%	-18.7%	-5.7%	783	7.7%	4.2%	16.1%	7135

Comparisons with equivalent periods, 2011

England

	Month: February 2012			Unweighted	YTD: January - February 2012			Unweighted	12 month rolling March 2011 - February 2012			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	-14.8%	-24.1%	-6.4%	787	-6.2%	-14.8%	3.4%	1537	6.8%	4.1%	11.3%	14542
PURPOSE:												
Pure Holiday	-14.5%	-21.9%	-10.6%	262	-5.1%	-7.3%	5.3%	474	4.4%	3.0%	9.8%	6705
- 1-3 nights holiday	-3.3%	-6.6%	1.0%	218	-0.6%	-2.7%	10.1%	383	6.7%	5.9%	10.3%	4195
- 4+ nights holiday	-47.3%	-38.4%	-37.4%	45	-21.7%	-13.2%	-7.6%	90	0.3%	1.3%	9.2%	2497
VFR (on holiday)	-5.8%	-18.3%	-19.4%	180	1.1%	-11.5%	-13.0%	371	15.2%	11.7%	10.7%	3004
HOLIDAY (TOTAL)	-11.4%	-20.5%	-12.6%	443	-2.6%	-9.1%	0.3%	843	7.5%	5.2%	10.0%	9708
VFR (non-holiday)	-35.6%	-38.1%	-22.1%	174	-27.5%	-24.7%	-12.1%	344	-4.4%	-3.1%	4.0%	2579
VFR (TOTAL)	-23.6%	-28.5%	-21.1%	355	-15.3%	-18.0%	-12.4%	715	5.2%	5.0%	7.6%	5583
Business	-0.4%	2.9%	6.2%	137	7.9%	15.2%	14.6%	289	13.7%	12.6%	17.6%	1793
Regions:												
West Midlands	-32.3%	-37.6%	-25.6%	59	-12.9%	-17.6%	-9.9%	120	0.8%	-9.6%	1.1%	1130
East of England	-31.6%	-29.1%	-4.2%	64	-20.2%	-20.1%	38.7%	132	11.5%	8.5%	19.0%	1429
East Midlands	-6.9%	-37.2%	-20.9%	64	-7.2%	-25.7%	-10.2%	127	13.1%	6.2%	18.6%	1258
London	-9.0%	-37.7%	-5.9%	107	1.9%	-14.8%	2.2%	214	-0.9%	6.1%	-0.6%	1505
North West	9.8%	10.4%	23.3%	127	8.8%	6.8%	14.4%	228	11.7%	8.1%	17.2%	1971
North East	-14.5%	-11.4%	5.1%	35	14.2%	13.5%	15.0%	77	22.2%	20.6%	21.4%	626
South East	-0.7%	-29.2%	-2.3%	144	5.0%	-7.5%	14.9%	282	6.0%	2.7%	17.8%	2364
South West	-26.1%	-20.1%	-26.9%	114	-17.6%	-16.2%	-16.9%	220	1.8%	0.3%	7.9%	2884
Yorkshire & the Humber	-15.4%	-24.9%	-13.1%	79	-11.3%	-37.2%	-0.6%	148	11.9%	6.3%	11.5%	1578
LOCATION TYPE:												
Seaside	-12.3%	-12.0%	-12.3%	114	-2.3%	4.3%	-0.5%	190	6.0%	7.6%	9.6%	3050
Large city/ large town	-20.7%	-30.6%	-9.4%	367	-3.5%	-16.3%	5.3%	759	6.7%	2.2%	11.8%	5745
Small town	-8.8%	-28.0%	-11.2%	189	-16.8%	-26.7%	-16.1%	366	4.6%	2.9%	7.7%	3305
Countryside/ village	-5.7%	-11.5%	17.5%	128	4.1%	-3.5%	28.0%	239	12.0%	3.5%	16.3%	2733
AGE:												
16-24	-1.9%	-25.0%	26.9%	138	-3.8%	-24.2%	13.3%	260	-0.9%	-7.1%	12.3%	1801
25-34	-5.4%	-1.0%	-10.3%	139	3.2%	-7.6%	0.8%	255	4.3%	11.3%	7.7%	2369
35-44	-35.2%	-40.4%	-28.4%	151	-21.0%	-29.7%	-21.6%	294	5.9%	1.0%	7.2%	3111
45-54	-14.4%	-23.3%	-11.8%	137	-5.5%	-1.1%	9.2%	281	8.8%	5.9%	13.1%	2531
55+	-7.3%	-20.8%	12.1%	225	0.6%	-8.9%	23.6%	450	11.4%	6.9%	14.9%	4731
SEG:												
AB	-21.1%	-25.1%	-18.3%	268	-12.6%	-20.8%	-8.8%	533	6.1%	1.0%	8.5%	4825
C1	-9.7%	-23.5%	6.7%	270	-0.8%	-9.8%	10.6%	514	11.3%	12.0%	17.3%	4651
C2	-8.5%	-32.4%	2.7%	121	6.0%	-15.0%	20.5%	241	6.1%	1.4%	11.8%	2521
DE	-14.3%	-10.7%	0.0%	126	-12.4%	-7.3%	20.6%	243	-0.7%	-1.0%	4.7%	2511
CHILDREN IN H/H:												
Any	-23.5%	-30.7%	-22.4%	240	-13.0%	-18.1%	-9.9%	460	3.0%	-0.7%	6.9%	5184
None	-11.2%	-21.6%	-0.3%	546	-3.5%	-13.6%	8.4%	1076	8.6%	6.5%	13.1%	9353
ACCOMMODATION:												
Commercial accom	-10.9%	-23.9%	-8.8%	425	-0.2%	-10.5%	4.7%	816	6.2%	3.9%	10.1%	8322
- Serviced accom	-8.5%	-13.8%	-3.9%	366	2.0%	3.4%	9.7%	711	7.5%	4.4%	11.3%	5696
- Hotel/motel/guesthouse	-11.3%	-19.0%	-8.4%	329	-1.0%	-3.2%	4.7%	643	7.9%	5.6%	12.1%	5081
- Bed & Breakfast	29.8%	46.8%	52.4%	33	40.5%	70.7%	74.2%	59	6.3%	-1.2%	5.0%	565
Total self-catering rented	-17.6%	-16.7%	-34.0%	49	-16.6%	-14.2%	-18.1%	77	2.8%	5.2%	9.6%	2411
-Camping & Caravanning (inc. owned caravans)	-14.4%	-46.5%	-20.0%	20	-34.5%	-49.6%	-29.6%	25	5.0%	5.9%	17.3%	1809
-Other self-catering rented	-11.3%	-2.8%	-37.2%	35	2.6%	4.8%	-15.5%	61	3.1%	6.3%	6.2%	942
Hostels	-34.1%	-26.1%	27.3%	8	-16.2%	1.9%	-6.9%	18	-16.3%	-13.1%	-30.8%	131
Own home/friends'/relatives'	-19.2%	-24.9%	1.3%	350	-12.1%	-16.5%	2.9%	691	7.9%	5.0%	16.0%	6028