

# GB TOURISM SURVEY - January 2012

## SUMMARY OF RESULTS



### 1. Headlines

- In the month of January, there were 6.3 million domestic overnight tourism trips in Great Britain, a 5% increase from 6.0 million in January 2011. However, it is worth bearing in mind that the weather was considerably better this January than in January 2011, where in some parts of the country snow was still affecting travel.
- Bednights fell by 1%, whilst overall spend increased by 10%, pointing to shorter, but higher value trips being taken.
- Trips, Nights, and Spend in January increased for Holidays and Business travel, whilst the number of people visiting friends and relatives in January decreased when compared with January 2011.
- A similar pattern was reflected in England, with the number of trips taken in the month up by 5% and spend up by 16%, but a 3% decline in the number of nights.

### 2. Trip Characteristics

- Trip volumes increased for holidays and business trips in Great Britain in January 2012 compared to January 2011, with holidays up by 15% and business trips up by 12%. However, the number of trips to visit friends and relatives decreased by 7% when comparing the same period.
- The same pattern also followed for spend, particularly for holiday trips where spend was up by 28% in Great Britain and 30% in England in January 2012 compared to January 2011. Spend on Business trips has also increased.
- Growth in trips to the Seaside and the Countryside was above average (20% and 21% respectively), as was spend (19% and 40% respectively), however trips to small towns performed below average when compared the equivalent period in 2011, showing a 22% decrease in trips and a 13% decrease in spend.
- Temperatures in January 2012 were the mildest since 2008, whereas January 2011 was very cold, and snow was still causing some travel disruption. This may have had an impact on the growth figures.

### 3. Overseas Travel by UK Residents

- From February 2011 to January 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 1%. The month of January saw a 6% decrease in outbound trip volumes compared to 2011.

### 4. Other Tourism Surveys

- The UK Occupancy survey showed that occupancy levels for the UK as a whole had reached the highest levels in the last 5 years for the month of January, up four percentage points for bedspace occupancy (now 33%) and three percentage points for room occupancy (now 47%).
- In the Accommodation Business Confidence monitor, 29% of businesses interviewed in January 2012 reported that over the Christmas/New Year period they had more visitors than in 2011, while 33% had fewer.

## KEY MEASURES



### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
<b>January '12</b>									
GB	6.0	6.3	+5%	14.8	14.7	-1%	923	1017	+10%
England	5.1	5.4	+5%	12.6	12.3	-3%	755	877	+16%

### Purpose of Trip – January 2012

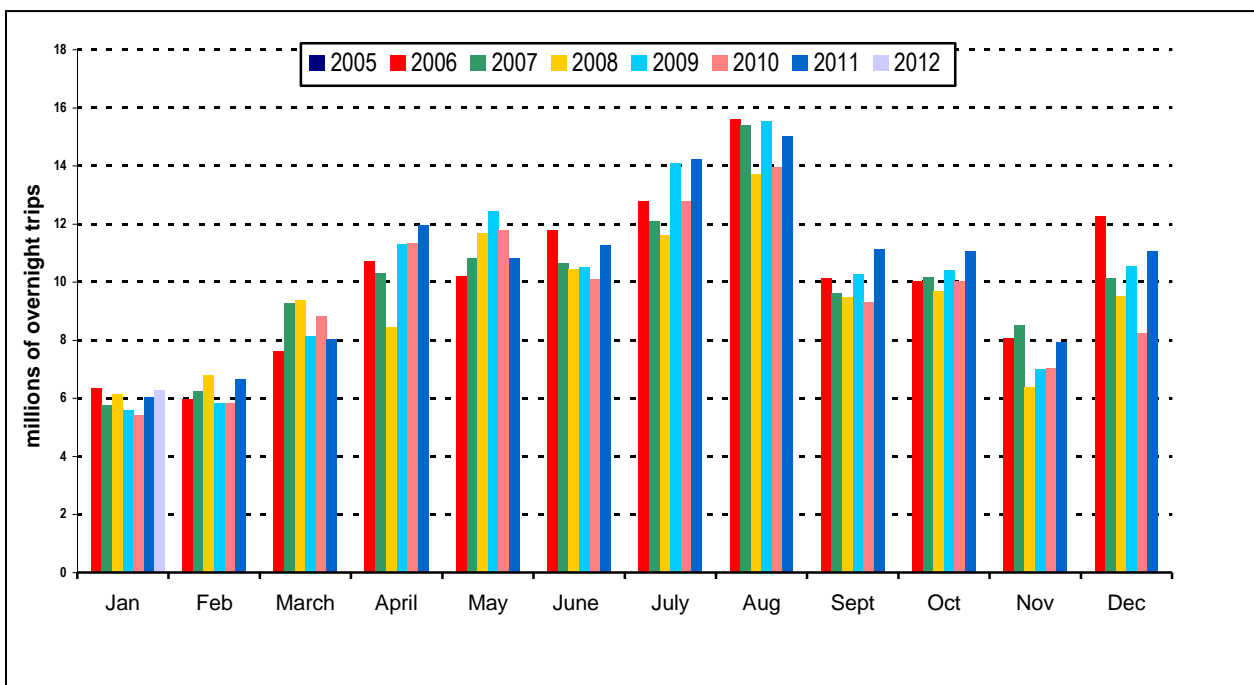
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
<b>GB</b>									
Holiday	1.7	1.9	+15%	3.9	4.8	+21%	326	418	+28%
Business	1.3	1.4	+12%	2.8	3.3	+19%	296	319	+8%
VFR	2.9	2.7	-7%	6.2	6.1	-3%	254	243	-4%
<b>England</b>									
Holiday	1.4	1.5	+10%	3.1	3.7	+19%	265	345	+30%
Business	1.1	1.2	+17%	2.3	3.0	+27%	233	290	+25%
VFR	2.5	2.4	-5%	5.4	5.2	-4%	213	210	-1%

### Outbound Travel – UK Residents

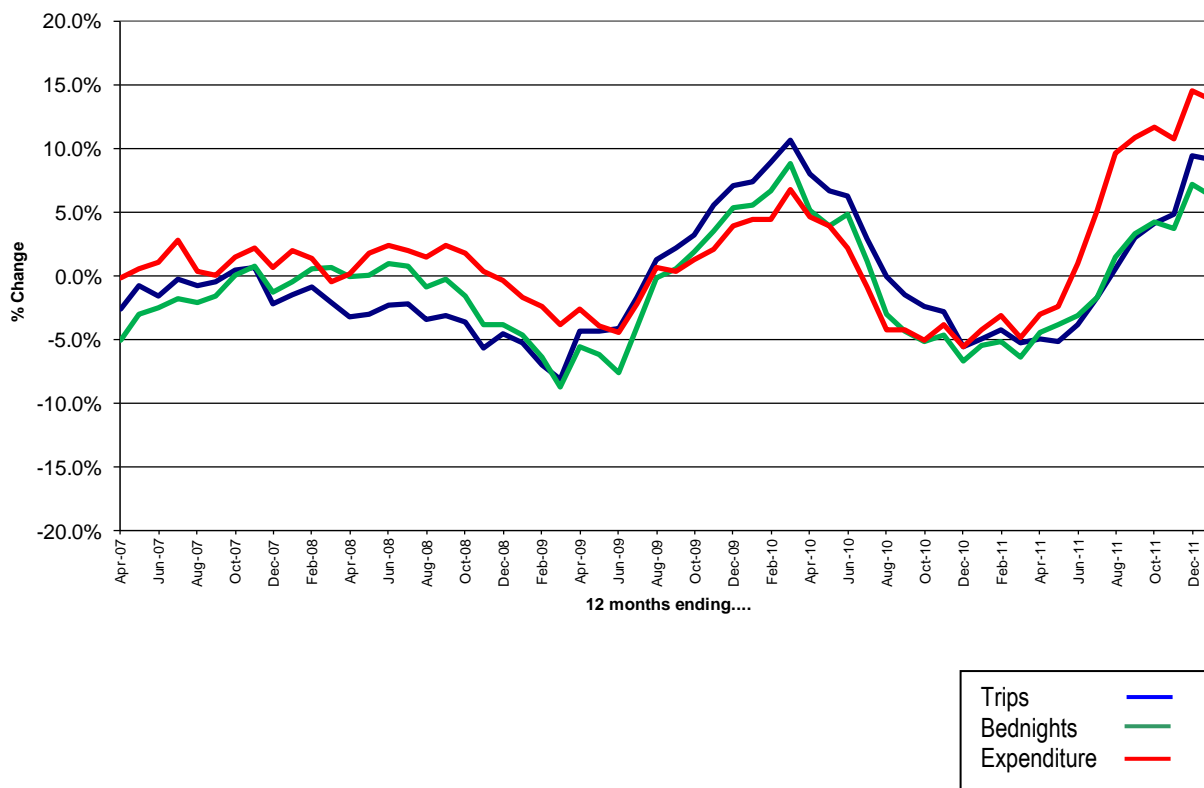
	TRIPS (MILLIONS)			SPEND (£BN)		
	2011	2012	% +/-	2011	2012	% +/-
<b>January 2012</b>	3.4	3.2	-6%	2.0	1.9	-3%
Feb '11 – Jan '12	55.6	55.9	+1%	31.8	31.0	-1%

## 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 (January 2011 vs January 2012)
- Year to date (January - December 2011 vs January – December 2012)
- 12 month rolling (January 2011 – December 2011 vs January 2012 – December 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.



