

GB TOURISM SURVEY - March 2012

SUMMARY OF RESULTS

1. Headlines

- In the month of March, there were 8.8 million domestic tourism trips in Great Britain, a 9% increase from 8.0 million in 2011.
- The number of bednights and total expenditure also increased by 15% and 18% respectively during the month.
- The same pattern emerged in England, whereby trips increased by 13%, rising from 6.6 million in March 2011 to 7.5 million in March 2012. Total nights were also up by 17% and spend by 19%.
- Looking at year to date figures, the number of trips to Great Britain has actually declined by 1% and nights also saw a decline of 4%. However, spend is up by 7% against the same period last year.
- Looking at the past 12 months, there were 9.7 million more trips taken in Great Britain compared with the same period the year before; an increase of 8%.

2. Trip Characteristics

- In the first quarter of 2012, holiday trips in Great Britain increased by 3% when compared with the same period last year, rising from 7.7 million to 8.0 million. Holiday nights and spend also saw an increase, rising by 2% and 9% respectively.
- Within holiday trips there was an above average increase in the number of shorter 1-3 night breaks (up by 5%). The value of these holiday trips also grew (rising 14%). Longer breaks fell in this period (by 3%), as did expenditure (also by 3%).
- Visits to friends and family saw decreases in trips, nights and spend in the first quarter, falling by 8%, 5% and 3% respectively.
- Business trips increased during the same period (by 2%), as did business nights and spend (rising by 5% and 10% respectively).
- In the first three months of the year, trips to seaside towns performed above average when compared to other location types, increasing by 6% for trips and 7% for spend. The remaining location types witnessed slight declines in both trips and bednights. Spend increased across all location types, apart from small towns, where expenditure dropped by 4% when compared with the same period last year.
- The number of trips taken by those with children also saw a decline when compared to the same period last year, falling by 9%, whereas trips taken by households without children saw an increase of 2%.
- Temperatures in Great Britain for March were the warmest for the month since 1957, which may account for an increase in the number of trips, nights and spend figures.

3. Overseas Travel by UK Residents

- In the year to March 2012, UK residents made slightly more trips abroad compared to April '10 - March '11 (1%), with spend decreasing by 2%. Looking specifically at the month of March, outbound travel volumes also increased slightly (by 1%) when compared with March 2011 whilst spend increased by 3% during the same period.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 44% for the month of March (3% higher than in March 2011).

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
March '12									
GB	8.0	8.8	+9%	20.7	23.9	+15%	1,289	1,523	+18%
England	6.6	7.5	+13%	16.9	19.8	+17%	1,066	1,264	+19%
Jan-Mar '12									
GB	22.1	21.8	-1%	55.6	53.4	-4%	3,426	3,657	+7%
England	18.5	18.6	+1%	45.9	44.5	-3%	2,802	3,059	+9%

Purpose of Trip – March 2012

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	3.3	3.7	+11%	9.1	10.6	+17%	636	748	+18%
Business	1.5	1.5	-1%	3.3	3.3	-1%	319	385	+21%
VFR	2.9	3.2	+10%	7.8	9.0	+17%	299	335	+12%
England									
Holiday	2.6	3.0	+16%	6.9	8.4	+22%	495	622	+26%
Business	1.3	1.3	-2%	2.9	2.7	-5%	291	300	+3%
VFR	2.5	2.9	+15%	6.8	7.9	+17%	252	300	+19%

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

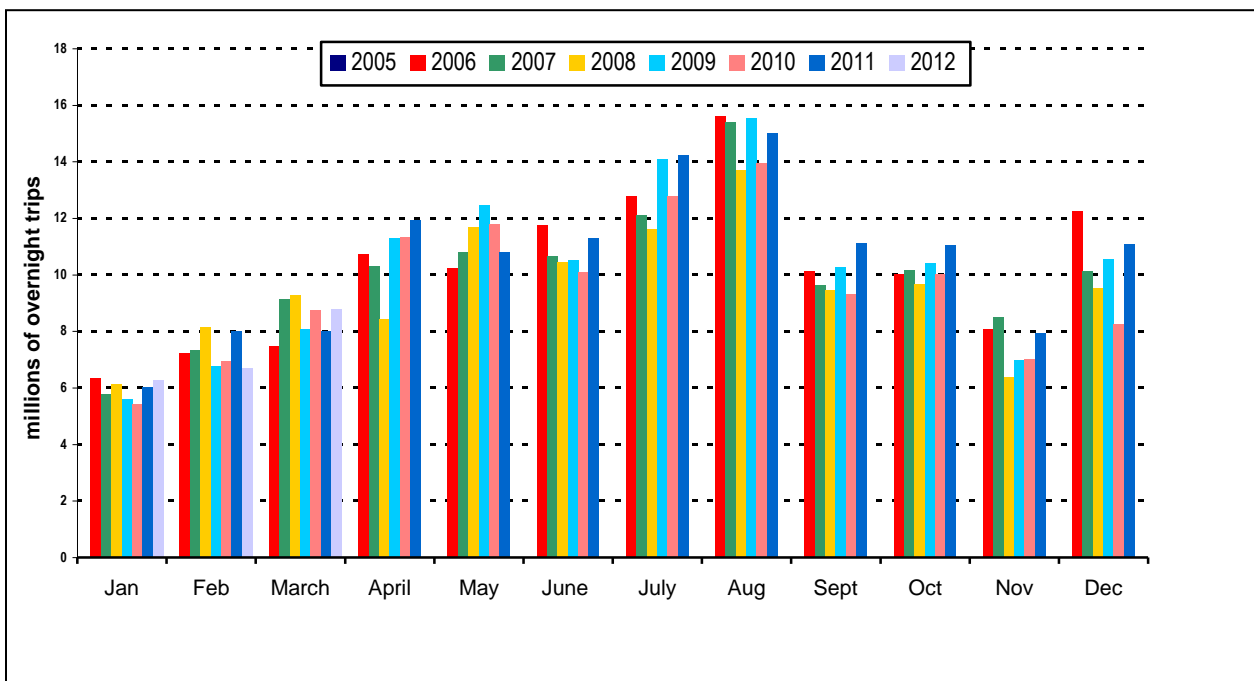
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	7.7	8.0	+3%	20.3	20.8	+2%	1,514	1,647	+9%
Business	4.2	4.3	+2%	8.8	9.2	+5%	925	1,018	+10%
VFR	9.3	8.6	-8%	22.6	21.4	-5%	869	846	-3%
England									
Holiday	6.2	6.4	+4%	15.6	16.5	+6%	1,176	1,339	+14%
Business	3.6	3.7	+4%	7.4	7.9	+7%	784	866	+11%
VFR	8.1	7.6	-6%	19.6	18.4	-6%	744	730	-2%

Outbound Travel – UK Residents

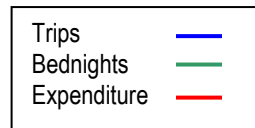
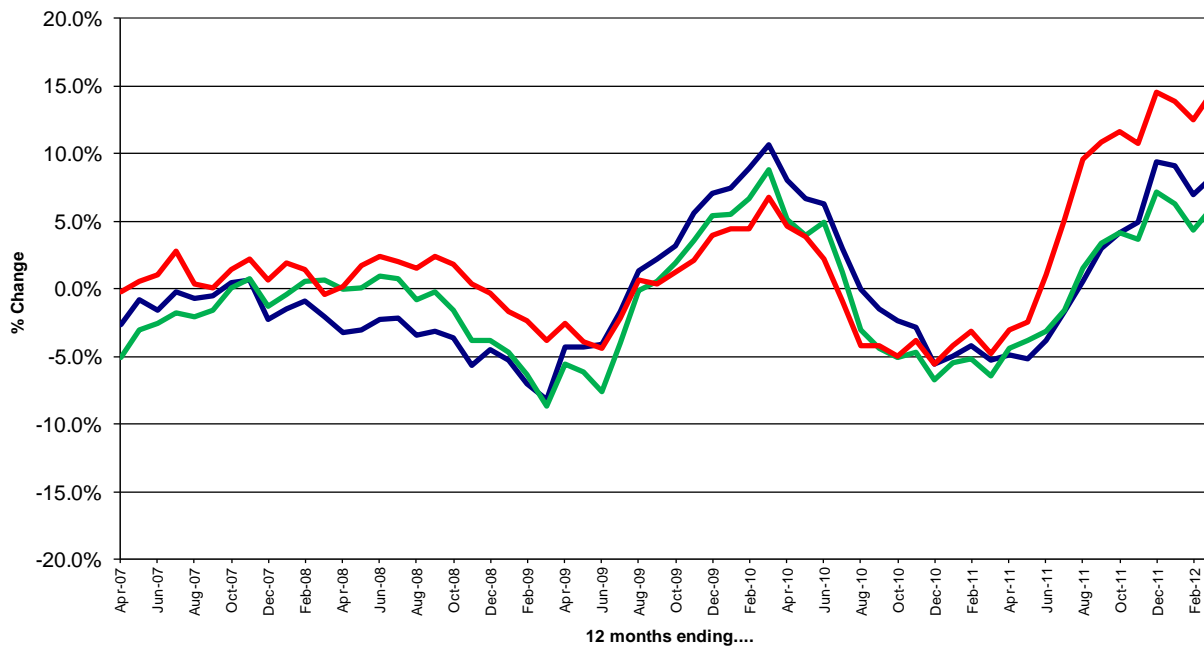
	TRIPS (MILLIONS)			SPEND (£BN)		
	2011	2012	% +/-	2011	2012	% +/-
March	3.6	3.6	+1%	2.1	2.2	+3%
January-March	10.2	10.2	0%	5.9	5.9	+1%
April '11 – Mar '12	55.6	56.0	+1%	31.6	31.1	-2%

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

