

GB TOURISM SURVEY - May 2012 SUMMARY OF RESULTS

1. Headlines

- There were 10.2 million domestic overnight trips in Great Britain in May, a 6% decrease from 10.8 million in 2011 and the lowest volume for the month since 2006.
- The number of bednights (-13%) and spend (-4%) also decreased.
- England saw the same pattern, with trips down 7% (falling from 8.8 million in May 2011 to 8.2 million in May 2012), nights down 13% and spend down 5%.
- In the year to date, the number of trips in Great Britain has declined by 4%. Nights have also declined (-8%); however, spend has actually increased so far this year, by 3%.
- Looking at the past 12 months, there were 8.7 million more trips taken in Great Britain compared with the same period the year before, an increase of 7%.

2. Context

- In 2011 the Spring Bank Holiday fell in late May, whereas in 2012 it fell in early June (along with the Diamond Jubilee Bank Holiday).
- While temperatures, rainfall and sunshine levels for the month were around average, the first three weeks of the month were unusually cool and wet, with temperatures and sunshine picking up from the 21st.

3. Trip Characteristics

- Between January and May 2012, the number of holiday trips in Great Britain decreased by 6%, from 19.6 million to 18.6 million – though volumes remain above pre-recession levels for the same period. The amount spent on holidays has fallen back by 3% since the start of the year.
- While the number of short holiday breaks has held steady (+1%), there has been a steep decline in the number of 4+ night holidays (-19%). As a result, the total number of holiday nights has declined by 12%, taking the bed-night volume for the first five months of the year back to 2007 levels.
- The number of trips to visit friends and relatives (VFR) has also decreased so far this year (-9%), as has the volume of VFR nights (-8%) and the amount spent (-2%).
- However, the number of business trips increased between January and May (by 10%), as did business nights (-13%) and spend (18%). Possibly linked to this, large towns / cities are the only destination type to see an increase in trip volumes (+2%).
- Perhaps unsurprisingly given the poor weather in April and May, camping & caravanning trips were down year-to-date (-16%), while stays in serviced accommodation were up by 10%.

4. Overseas Travel by UK Residents

- As with domestic overnight trips, trips abroad by UK residents decreased in May 2012 (by 9%). Spend also decreased, by 7%. For the year to May, trips abroad were down slightly (-2%) while spend remains flat (up 1%).

5. Other Tourism Surveys

- VisitEngland's Tourism Business Monitor for May and early June showed that year-to-date, 46% of accommodation providers had less visitors than over the same period in 2011, while only 31% reported an increase. The picture among attractions was more mixed, with while 39% reporting less visitors, and 42% reporting an increase.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
May '12									
GB	10.8	10.2	-6%	33.0	28.8	-13%	1,983	1,898	-4%
England	8.8	8.2	-7%	26.0	22.6	-13%	1,578	1,494	-5%
Jan-May'12									
GB	44.8	43.2	-4%	126.0	115.5	-8%	7,452	7,647	+3%
England	37.2	35.9	-4%	102.0	93.4	-8%	6,026	6,221	+3%

Purpose of Trip – May 2012

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	5.7	4.9	-13%	20.4	16.0	-22%	1,220	1,059	-13%
Business	1.4	1.8	+30%	2.8	4.1	+43%	380	457	+20%
VFR	3.4	3.1	-8%	8.8	8.0	-10%	354	335	-5%
England									
Holiday	4.4	3.8	-13%	15.5	12.1	-22%	936	827	-12%
Business	1.2	1.5	+21%	2.8	3.2	+43%	323	354	+10%
VFR	2.9	2.7	-10%	7.4	6.7	-10%	297	279	-6%

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

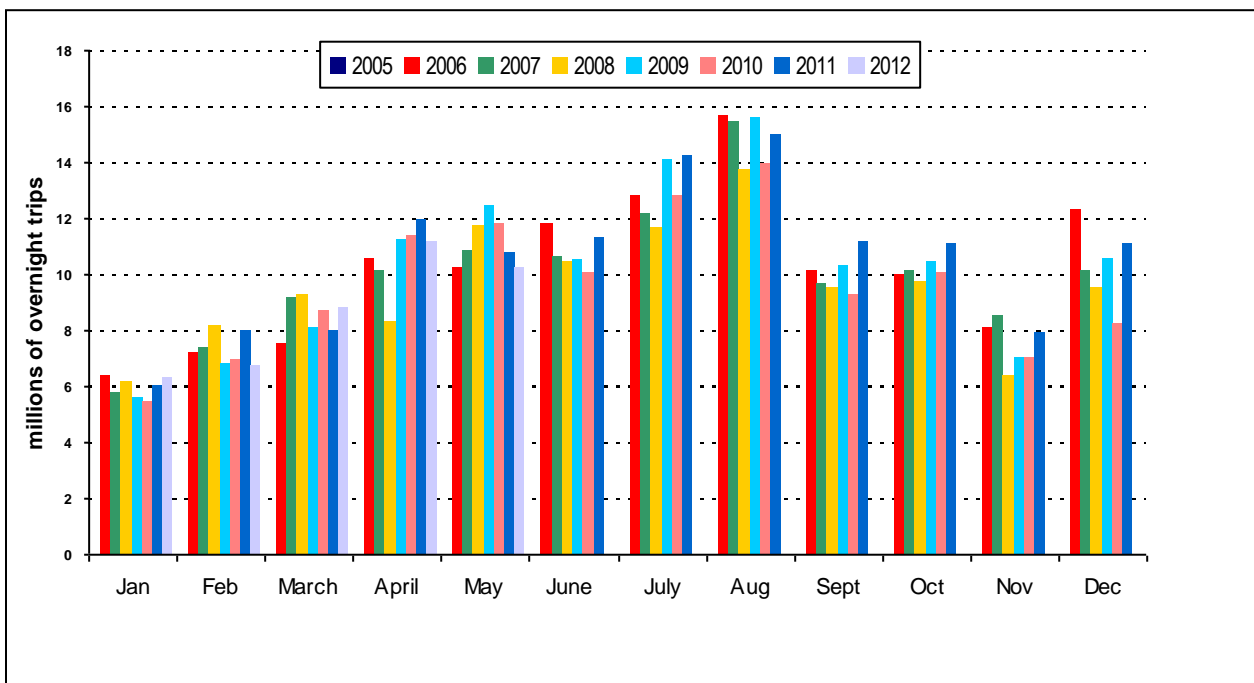
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	19.6	18.6	-6%	61.9	54.7	-12%	4,042	3,937	-3%
Business	7.0	7.7	+10%	15.2	17.2	+13%	1,608	1,900	+18%
VFR	16.6	15.2	-9%	43.3	39.7	-8%	1,600	1,564	-2%
England									
Holiday	15.5	14.7	-5%	47.6	42.2	-11%	3,129	3,145	+1%
Business	6.0	6.5	+7%	12.8	14.5	+13%	1,373	1,562	+14%
VFR	14.4	13.2	-8%	36.8	33.4	-9%	1,357	1,311	-3%

Outbound Travel – UK Residents

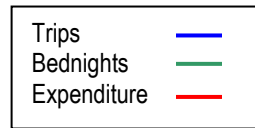
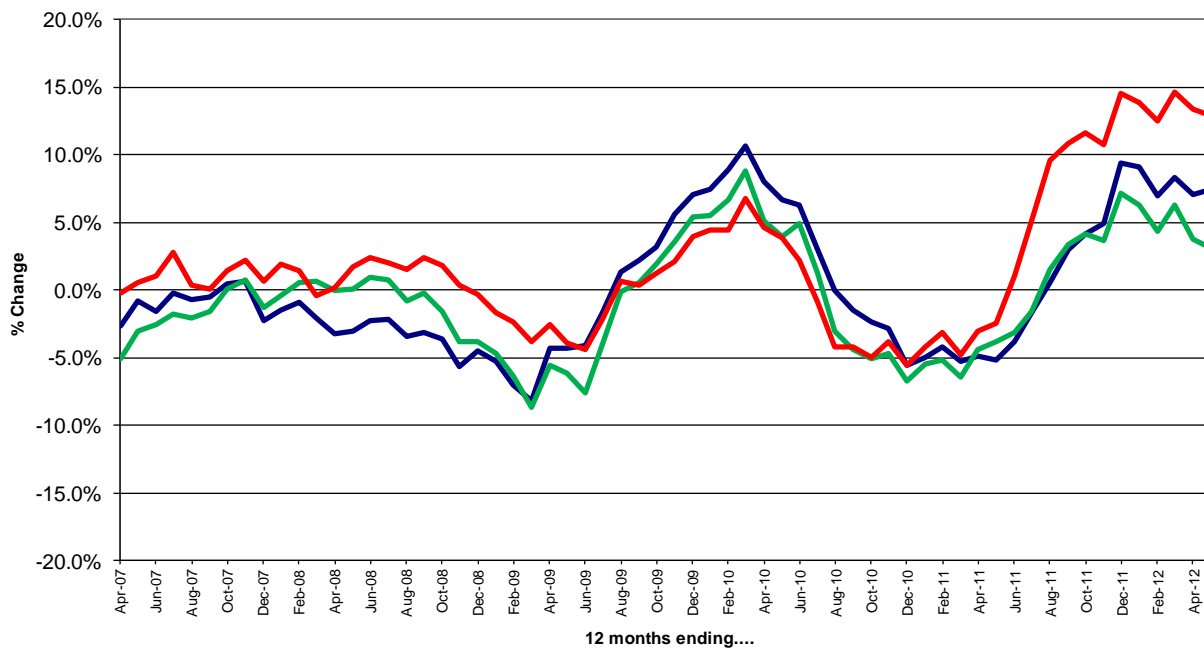
	TRIPS (MILLIONS)			SPEND (£BN)		
	2011	2012	% +/-	2011	2012	% +/-
May	5.2	4.7	-9%	2.7	2.5	-7%
January-May	20.3	19.9	-2%	11.0	11.1	+1%
June '11 – May '12	56.8	56.4	-1%	31.7	31.8	0%

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

