

Great Britain Tourism Survey

August 2012 Update



Summary – August 2012 Update

ALL TOURISM

- Compared to August last year, GB overnight domestic tourism in **August 2012 showed increases in trips, nights and spend** (+8%, +6% and +7% respectively). It is possible that due to the poor summer weather in the preceding months, many domestic holidaymakers delayed their summer holiday until August. Also, for some, the Olympics will have caused them to postpone their holiday until later in August once the event had finished.
- However, **YTD GB trips and nights continue to demonstrate a negative trend**. Trips and bednights reported decreases of -3% and -4%. Before taking account of inflation, **YTD spend has increased** however by +2%.
- In volume terms, the 83.1 million GB trips taken during the January to August 2012 period represented a fall of 2.3m on 2011 (85.4m). 2012 is currently also underperforming compared to 2009 (84.3m) but so far is performing better than 2010 (81.1m), 2008 (79.4m) and 2007 (81.4m).

HOLIDAYS

- **Holidays in August 2012 also reported increases in trips, nights and spend** of +11%, +6% and +12% respectively compared to August 2011. It is likely that the Olympics had a positive effect on holidays in August. The summer weather also improved compared to June and July which will have boosted tourism.
- **YTD holiday trips and nights continue to report decreases:** -3% and -6% respectively. However, **expenditure has seen a positive month** with a reported +1% increase (before taking account of inflation).
- In 2012, GB holiday trips during Jan-August (41.1m) were lower than in 2011 (42.5m) and in 2009 (43.4m). However, 2012 is currently performing better than 2010 (40.7m), 2008 (36.8m) and 2007 (37.4m).

VISITING FRIENDS & RELATIVES

- **Visits to friends and relatives also experienced increases in August 2012** with trips, nights and spend increasing by +11%, +15% and +14% respectively. Perhaps this was as a result of the Olympics with more holidaymakers bringing forward or postponing their holiday and substituting with VFR trips during the month.
- **YTD VFR also reported a decrease on the same period in 2011:** -5% and -4% in trips and nights respectively and no change in expenditure.
- VFR trips during the first eight months of 2012 (26.9m) have decreased on 2011 (28.3m). Indeed, with all other years reporting higher trip volumes, 2012 represents the poorest performing year to date in VFR tourism: 2010 (27.6m), 2009 (27.6m), 2008 (27.7m) and 2007 (29.4m).

BUSINESS TOURISM

- **In contrast to holiday and VFR tourism, business tourism performed poorly in August 2012**, with trips, nights and expenditure decreasing by -25%, -21% and -28% respectively. Undoubtedly many businesses (particularly those in the South East) will have been affected during the Olympics with general commuting and business meetings being avoided during the month.
- However, **YTD business tourism still reported increases** of +3%, +10% and +6% in trips, nights and spend.
- Business trips in 2012 (12.3m) are in line with 2008 (12.3m) but lower than in 2007 (12.5m). The volumes for other years are lower: 2011 (11.9m), 2010 (10.6m) and 2009 (11.4m).

GB Domestic Tourism: Monthly Volume & Value 2012

ALL TOURISM

TRIPS	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	6.024	6.294	+4.5%	8.011	6.711	-16.2%	8.029	8.793	+9.5%	11.963	11.154	-6.8%	10.821	10.226	-5.5%	11.314	11.482	+1.5%
England	5.139	5.398	+5.0%	6.690	5.698	-14.8%	6.624	7.501	+13.2%	9.916	9.04	-8.8%	8.818	8.235	-6.6%	9.182	9.532	+3.8%
BEDNIGHTS	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	14.822	14.669	-1.0%	20.051	14.878	-25.8%	20.677	24.334	+17.7%	37.424	32.878	-12.1%	32.983	28.758	-12.8%	36.091	35.859	-0.6%
England	12.615	12.287	-2.6%	16.411	12.448	-24.1%	16.923	20.275	+19.8%	30.05	25.786	-14.2%	25.963	22.572	-13.1%	28.542	28.511	-0.1%
EXPENDITURE	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	£923	£1,017	+10.2%	£1,215	£1,117	-8.1%	£1,289	£1,524	+18.2%	£2,043	£2,092	+2.4%	£1,983	£1,898	-4.3%	£2,192	£2,330	+6.3%
England	£755	£877	+16.2%	£981	£918	-6.4%	£1,066	£1,264	+18.6%	£1,645	£1,668	+1.4%	£1,578	£1,494	-5.3%	£1,666	£1,881	+12.9%

TRIPS	July			August			September			October			November			December			YTD - Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	14.239	12.291	-13.7%	15.029	16.155	+7.5%													85.43	83.107	-2.7%
England	11.572	10.064	-13.0%	12.209	13.17	+7.9%													70.149	68.638	-2.2%
BEDNIGHTS	July			August			September			October			November			December			YTD - Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	53.199	48.343	-9.1%	59.178	62.799	+6.1%													274.424	262.518	-4.3%
England	39.442	37.425	-5.1%	46.254	50.391	+8.9%													216.201	209.696	-3.0%
EXPENDITURE	July			August			September			October			November			December			YTD - Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	£2,947	£2,727	-7.5%	£3,129	£3,352	+7.1%													£15,719	£16,056	+2.1%
England	£2,344	£2,180	-7.0%	£2,403	£2,702	+12.4%													£12,438	£12,984	+4.4%

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 **All expenditure figures are in HISTORIC PRICES.



Fieldwork: 8 August - 30 September
 TNS Face-to-Face Omnibus Survey
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GB Domestic Tourism: Monthly Volume & Value 2012

HOLIDAYS

TRIPS	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	1.681	1.934	+15.1%	2.729	2.350	-13.9%	3.334	3.698	+10.9%	6.199	5.641	-9.0%	5.705	4.944	-13.3%	5.838	6.002	+2.8%
England	1.395	1.532	+9.8%	2.207	1.886	-14.5%	2.601	3.023	+16.2%	4.903	4.437	-9.5%	4.378	3.811	-13.0%	4.493	4.737	+5.4%

BEDNIGHTS	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	3.945	4.779	+21.1%	7.274	5.394	-25.8%	9.093	10.619	+16.8%	21.234	17.903	-15.7%	20.395	15.964	-21.7%	22.047	22.223	+0.8%
England	3.130	3.723	+18.9%	5.609	4.381	-21.9%	6.906	8.439	+22.2%	16.463	13.565	-17.6%	15.467	12.066	-22.0%	16.704	16.83	+0.8%

EXPENDITURE	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	£326	£418	+28.2%	£552	£481	-12.9%	£636	£748	+17.6%	£1,308	£1,231	-5.9%	£1,220	£1,059	-13.2%	£1,366	£1,495	+9.4%
England	£265	£345	+30.2%	£416	£372	-10.6%	£495	£622	+25.7%	£1,018	£980	-3.7%	£936	£827	-11.6%	£998	£1,169	+17.1%

TRIPS	July			August			September			October			November			December			YTD - Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	8.006	6.548	-18.2%	9.004	10.005	+11.1%													42.496	41.121	-3.2%
England	6.293	5.124	-18.6%	7.057	7.94	+12.5%													33.327	32.489	-2.5%

BEDNIGHTS	July			August			September			October			November			December			YTD - Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	35.424	29.872	-15.7%	40.876	43.429	+6.2%													160.287	150.184	-6.3%
England	25.416	22.477	-11.6%	30.572	34.399	+12.5%													120.267	115.882	-3.6%

EXPENDITURE	July			August			September			October			November			December			YTD - Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	£1,983	£1,782	-10.1%	£2,204	£2,464	+11.8%													£9,595	£9,678	+0.9%
England	£1,589	£1,392	-12.4%	£1,632	£1,964	+20.3%													£7,347	£7,670	+4.4%

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 TNS Face-to-Face Omnibus Survey
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GB Domestic Tourism: Monthly Volume & Value 2012

VISITING FRIENDS & RELATIVES

TRIPS	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	2.854	2.666	-6.6%	3.552	2.732	-23.1%	2.887	3.188	+10.4%	3.937	3.483	-11.5%	3.369	3.096	-8.1%	3.382	3.551	+5.0%
England	2.489	2.370	-4.8%	3.139	2.397	-23.6%	2.477	2.863	+15.6%	3.386	2.949	-12.9%	2.937	2.655	-9.6%	2.918	3.11	+6.6%
BEDNIGHTS	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	6.210	6.053	-2.5%	8.666	6.319	-27.1%	7.761	9.528	+22.8%	11.803	9.78	-17.1%	8.847	7.991	-9.7%	9.395	8.672	-7.7%
England	5.368	5.178	-3.5%	7.441	5.323	-28.5%	6.773	8.390	+23.9%	9.77	7.887	-19.3%	7.414	6.663	-10.1%	8.106	7.479	-7.7%
EXPENDITURE	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	£254	£243	-4.3%	£316	£268	-15.2%	£299	£336	+12.4%	376	382	+1.6%	£354	£335	-5.4%	£339	£380	+12.1%
England	£213	£210	-1.4%	£279	£220	-21.1%	£252	£300	+19.0%	315	301	-4.4%	£297	£279	-6.1%	£280	£320	+14.3%

TRIPS	July			August			September			October			November			December			YTD – Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	4.183	3.552	-15.1%	4.167	4.63	+11.1%													28.332	26.898	-5.1%
England	3.577	3.1	-13.3%	3.522	3.888	+10.4%													24.444	23.332	-4.5%
BEDNIGHTS	July			August			September			October			November			December			YTD – Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	12.543	11.492	-8.4%	13.357	15.292	+14.5%													78.583	75.127	-4.4%
England	10.096	9.309	-7.8%	11.45	12.355	+7.9%													66.418	62.583	-5.8%
EXPENDITURE	July			August			September			October			November			December			YTD – Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	£514	£444	-13.6%	£487	£554	+13.8%													£2,940	£2,942	+0.1%
England	£424	£348	-17.9%	£394	£441	+11.9%													£2,454	£2,420	-1.4%

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GB Domestic Tourism: Monthly Volume & Value 2012

BUSINESS TOURISM

TRIPS	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	1.259	1.404	+11.5%	1.418	1.375	-3.0%	1.525	1.505	-1.3%	1.416	1.597	+12.8%	1.4	1.817	+29.8%	1.673	1.698	+1.5%
England	1.065	1.247	+17.1%	1.186	1.181	-0.4%	1.319	1.291	-2.1%	1.258	1.284	+2.1%	1.202	1.456	+21.1%	1.388	1.477	+6.4%

BEDNIGHTS	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	2.765	3.293	+19.1%	2.721	2.680	-1.5%	3.315	3.268	-1.4%	3.593	3.902	+8.6%	2.847	4.062	+42.7%	3.727	4.322	+16.0%
England	2.326	2.953	+27.0%	2.233	2.298	+2.9%	2.853	2.698	-5.4%	3.138	3.257	+3.8%	2.271	3.244	+42.8%	2.913	3.621	+24.3%

EXPENDITURE	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	£296	£319	+7.8%	£310	£314	+1.3%	£319	£385	+20.7%	£303	£425	+40.3%	£380	£457	+20.3%	£446	£423	-5.2%
England	£233	£290	+24.5%	£260	£276	+6.2%	£291	£300	+3.1%	£266	£342	+28.6%	£323	£354	+9.6%	£353	£366	+3.7%

TRIPS	July			August			September			October			November			December			YTD - Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	1.673	1.706	+2.0%	1.58	1.183	-25.1%													11.943	12.286	+2.9%
England	1.391	1.399	+0.6%	1.382	1.062	-23.2%													10.19	10.397	+2.0%

BEDNIGHTS	July			August			September			October			November			December			YTD - Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	3.78	4.68	+23.8%	4.067	3.223	-20.8%													26.814	29.43	+9.8%
England	2.788	3.683	+32.1%	3.466	2.917	-15.8%													21.988	24.671	+12.2%

EXPENDITURE	July			August			September			October			November			December			YTD - Jan-Aug		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB	£399	£418	+4.8%	£392	£283	-27.8%													£2,845	£3,024	+6.3%
England	£292	£367	+25.7%	£340	£252	-25.9%													£2,358	£2,547	+8.0%

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GB Domestic Tourism: Year to Date – 2007-2012

Trips, Bednights & Expenditure, Jan-Aug period

	ALL TOURISM, Jan – Aug period						HOLIDAYS – Jan – Aug period						VFR – Jan – Aug period						BUSINESS – Jan – Aug period					
TRIPS	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012
GB	81.421	79.36	84.274	81.081	85.43	83.107	37.427	36.801	43.379	40.712	42.496	41.121	29.412	27.659	27.606	27.571	28.332	26.898	12.493	12.332	11.351	10.586	11.943	12.286
England	67.431	65.223	69.791	66.83	70.149	68.638	29.585	28.892	34.362	32.107	33.327	32.489	25.532	23.6	24.135	23.99	24.444	23.332	10.554	10.566	9.698	8.819	10.19	10.397
BEDNIGHTS	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012
GB	268.831	267.467	280.032	261.404	274.424	262.518	149.408	144.903	168.708	152.991	160.287	150.184	82.601	81.424	77.904	76.669	78.583	75.127	29.568	29.348	27.928	25.135	26.814	29.43
England	213.431	211.01	221.318	205.453	216.201	209.696	113.303	108.019	129.285	116.865	120.267	115.882	70.196	68.399	64.861	64.043	66.418	62.583	24.23	24.472	22.964	19.547	21.988	24.671
EXPENDITURE	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012
GB	£13,966	£14,330	£14,888	£13,761	£15,719	£16,056	£7,899	£8,027	£9,000	£8,418	£9,595	£9,678	£2,808	£2,961	£2,869	£2,714	£2,940	£2,942	£2,935	£3,000	£2,773	£2,327	£2,845	£3,024
England	£11,104	£11,363	£11,981	£10,993	£12,438	£12,984	£6,115	£6,210	£7,086	£6,577	£7,347	£7,670	£2,368	£2,400	£2,398	£2,264	£2,454	£2,420	£2,372	£2,477	£2,289	£1,898	£2,358	£2,547

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GB Domestic Tourism: Year to Date – 2007-2012

Trip Characteristics, Jan-Aug period

Av. Trip Length	ALL TOURISM, Jan – Aug period						HOLIDAYS – Jan – Aug period						VFR – Jan – Aug period						BUSINESS – Jan – Aug period					
	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012
GB	3.30	3.37	3.32	3.22	3.21	3.16	3.99	3.94	3.89	3.76	3.77	3.65	2.81	2.94	2.82	2.78	2.77	2.79	2.37	2.38	2.46	2.37	2.25	2.40
England	3.17	3.24	3.17	3.07	3.08	3.06	3.83	3.74	3.76	3.64	3.61	3.57	2.75	2.90	2.69	2.67	2.72	2.68	2.30	2.32	2.37	2.22	2.16	2.37
Av. £/Night	ALL TOURISM, Jan – Aug period						HOLIDAYS – Jan – Aug period						VFR – Jan – Aug period						BUSINESS – Jan – Aug period					
	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012
GB	£52	£54	£53	£53	£57	£61	£53	£55	£53	£55	£60	£64	£34	£36	£37	£35	£37	£39	£99	£102	£99	£93	£106	£103
England	£52	£54	£54	£54	£58	£62	£54	£57	£55	£56	£61	£66	£34	£35	£37	£35	£37	£39	£98	£101	£100	£97	£107	£103
Av. £/Trip	ALL TOURISM, Jan – Aug period						HOLIDAYS – Jan – Aug period						VFR – Jan – Aug period						BUSINESS – Jan – Aug period					
	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012
GB	£172	£181	£177	£170	£184	£193	£211	£218	£207	£207	£226	£235	£95	£107	£104	£98	£104	£109	£235	£243	£244	£220	£238	£246
England	£165	£174	£172	£164	£177	£189	£207	£215	£206	£205	£220	£236	£93	£102	£99	£94	£100	£104	£225	£234	£236	£215	£231	£245

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**All expenditure figures are in HISTORIC PRICES.



Fieldwork: 8 August – 30 September
TNS Face-to-Face Omnibus Survey
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