

Great Britain Tourism Survey

September 2012 Update



Summary – September 2012 Update

ALL TOURISM

- Compared to September last year, it was a mixed performance for GB overnight domestic tourism in **September 2012 with a slight increase in nights** (+1%). However there was a **decrease in the number of trips and spend** (-7% and -1% respectively). The decline in trips is perhaps a result of the positive effect the Olympics had on holidays in August when holiday trips increased by +11% compared to August 2011. It's possible therefore that some holidaymakers pulled forward their holidays into August to coincide with the Olympics.
- **YTD GB trips and nights continue to demonstrate a negative trend** with both reporting decreases of -3% respectively. YTD spend has increased by +2% however (although when inflation is taken into account, there is no real increase).
- In volume terms, the 93.5 million GB trips taken during the January to September 2012 period represented a fall of 3.1m on 2011 (96.6m). 2012 is currently also underperforming compared to 2009 (94.6m) but so far is performing better than 2010 (90.4m), 2008 (88.8m) and 2007 (91.1m).

HOLIDAYS

- **Holidays in September 2012 reported increases in nights and spend** of +1% and +7% respectively compared to this period last year. The volume of **holiday trips however decreased** by -4%. This suggests fewer but slightly longer and higher spending holidays were taken compared to the previous September. It is possible the weather had an impact as it was the one of the coldest and wettest Septembers since 1993, with heavy rain during the latter part of the month causing flooding in parts of England.
- **YTD holiday trips and nights continue to report decreases:** -3% and -4% respectively. However, consistent with August, **expenditure has seen a positive month** with a reported +2% increase (before taking account of inflation).
- In 2012, GB holiday trips during Jan-Sep (46.6m) were lower than in 2011 (48.1m) and in 2009 (48.6m). However, 2012 is currently performing better than 2010 (45.5m), 2008 (41.3m) and 2007 (42.1m).

VISITING FRIENDS & RELATIVES

- **Visits to friends and relatives in September 2012 recorded decreases in trips and spend** (by -13% and -3% respectively). In contrast, there was an **increase in nights** (+4%). This is similar to the overall tourism trend this month, with fewer trips being taken. These trips tended to be longer and lower spending.
- **YTD VFR reported a decrease on the same period in 2011:** -6%, -3% and -0.3% in trips, nights and expenditure respectively.
- VFR trips during the first nine months of 2012 (30.2m) have decreased on 2011 (32.1m). Indeed, with the exception of 2011, which reported an increase on previous years, there is a declining trend in the volume of VFR tourism: 2010 (30.4m), 2009 (30.8m), 2008 (30.8m) and 2007 (32.6m).

BUSINESS TOURISM

- **As with August 2012, business tourism had the poorest performance in September 2012**, with trips, nights and expenditure decreasing by -14%, -21% and -33% respectively.
- However, helped by a positive first half of 2012, **YTD business tourism still reported increases** of +1%, +7% and +2% in trips, nights and spend.
- Business trips in 2012 (13.6m) are performing better than the three consecutive years of 2011 (13.5m), 2010 (12.1m) and 2009 (13.0m), but are underperforming compared to 2008 (14.0m) and 2007 (14.0m).

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-Sep		
	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	16.19	+7.7%	11.133	10.37	-6.9%										96.562	93.512	-3.2%
England	11.572	10.064	-13.0%	12.209	13.18	+8.0%	9.144	8.634	-5.6%										79.293	77.282	-2.5%
BEDNIGHTS	July			August			September			October			November			December			YTD - Jan-Sep		
	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	65.322	+10.4%	32.445	32.728	+0.9%										306.869	297.769	-3.0%
England	39.442	37.425	-5.1%	46.254	50.925	+10.1%	25.815	26.489	+2.6%										242.016	236.718	-2.2%
EXPENDITURE	July			August			September			October			November			December			YTD - Jan-Sep		
	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	£3,360	+7.4%	£2,096	£2,072	-1.1%										£17,815	£18,137	+1.8%
England	£2,344	£2,180	-7.0%	£2,403	£2,704	+12.5%	£1,640	£1,697	+3.5%										£14,078	£14,683	+4.3%

*Please note that the latest 2012 results are provisional and subject to minor changes in subsequent months due to the inclusion of trip-takers returning from late trips. Pre-2012 results are based on full-year data so will not change.
 **All expenditure figures are in HISTORIC PRICES.



Fieldwork: 12 Sep – 28 Oct
 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-Sep		
	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	10.031	+11.4%	5.615	5.399	-3.8%										48.112	46.547	-3.3%
England	6.293	5.124	-18.6%	7.057	7.94	+12.5%	4.504	4.427	-1.7%										37.831	36.916	-2.4%

BEDNIGHTS	July			August			September			October			November			December			YTD – Jan-Sep		
	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	45.418	+11.1%	19.657	19.841	+0.9%										179.944	172.015	-4.4%
England	25.416	22.477	-11.6%	30.572	34.399	+12.5%	15.525	16.018	+3.2%										135.791	131.9	-2.9%

EXPENDITURE	July			August			September			October			November			December			YTD – Jan-Sep		
	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	£2,471	+12.1%	£1,245	£1,329	+6.7%										£10,840	£11,013	+1.6%
England	£1,589	£1,392	-12.4%	£1,632	£1,964	+20.3%	£945	£1,090	+15.3%										£8,292	£8,759	+5.6%

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

VISITING FRIENDS & RELATIVES

	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
TRIPS																		
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																		
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																		
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%

	July			August			September			October			November			December			YTD - Jan-Sep		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
TRIPS																					
GB	4.183	3.552	-15.1%	4.167	4.633	+11.2%	3.726	3.251	-12.7%										32.057	30.153	-5.9%
England	3.577	3.1	-13.3%	3.522	3.891	+10.5%	3.136	2.809	-10.4%										27.58	26.144	-5.2%
BEDNIGHTS																					
GB	12.543	11.492	-8.4%	13.357	15.5	+16.0%	8.477	8.771	+3.5%										87.06	84.106	-3.4%
England	10.096	9.309	-7.8%	11.45	12.563	+9.7%	6.803	7.162	+5.3%										73.221	69.954	-4.5%
EXPENDITURE																					
GB	£514	£444	-13.6%	£487	£554	+13.8%	£435	£423	-2.8%										£3,376	£3,365	-0.3%
England	£424	£348	-17.9%	£394	£441	+11.9%	£343	£348	+1.5%										£2,798	£2,768	-1.1%

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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-Sep		
	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	1.189	-24.7%	1.508	1.305	-13.5%										13.451	13.597	+1.1%
England	1.391	1.399	+0.6%	1.382	1.067	-22.8%	1.284	1.02	-20.6%										11.475	11.422	-0.5%
BEDNIGHTS	July			August			September			October			November			December			YTD - Jan-Sep		
	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	3.549	-12.7%	3.726	2.958	-20.6%										30.539	32.714	+7.1%
England	2.788	3.683	+32.1%	3.466	3.242	-6.5%	3.065	2.255	-26.4%										25.053	27.251	+8.8%
EXPENDITURE	July			August			September			October			November			December			YTD - Jan-Sep		
	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	£285	-27.3%	£371	£249	-32.9%										£3,216	£3,275	+1.8%
England	£292	£367	+25.7%	£340	£253	-25.6%	£316	£192	-39.2%										£2,674	£2,741	+2.5%

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GB Domestic Tourism: Year to Date – 2007-2012

Trips, Bednights & Expenditure, Jan-Sep period

	ALL TOURISM, Jan – Sep period						HOLIDAYS – Jan – Sep period						VFR – Jan – Sep period						BUSINESS – Jan – Sep 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	91.063	88.838	94.568	90.387	96.562	93.512	42.052	41.302	48.616	45.475	48.112	46.547	32.607	30.79	30.778	30.364	32.057	30.153	14.018	13.967	12.98	12.102	13.451	13.597
England	75.264	73.14	78.226	74.343	79.293	77.282	33.293	32.438	38.444	35.894	37.831	36.916	28.263	26.431	26.9	26.352	27.58	26.144	11.762	11.942	11.074	10.012	11.475	11.422
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	298.097	296.685	311.696	290.171	306.869	297.769	166.243	161.19	187.764	170.366	179.944	172.015	90.688	89.543	86.341	84.264	87.06	84.106	33.247	33.462	31.382	28.354	30.539	32.714
England	236.802	235.139	246.439	227.995	242.016	236.718	126.405	121.026	144.215	130.576	135.791	131.9	77.015	75.567	71.742	69.868	73.221	69.954	27.158	27.826	25.714	22.214	25.053	27.251
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	£15,705	£16,131	£16,702	£15,592	£17,815	£18,137	£8,887	£9,013	£10,054	£9,529	£10,840	£11,013	£3,140	£3,316	£3,201	£3,023	£3,376	£3,365	£3,314	£3,425	£3,168	£2,693	£3,216	£3,275
England	£12,463	£12,838	£13,429	£12,441	£14,078	£14,683	£6,917	£6,999	£7,920	£7,450	£8,292	£8,759	£2,619	£2,722	£2,671	£2,519	£2,798	£2,768	£2,655	£2,823	£2,605	£2,184	£2,674	£2,741

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GB Domestic Tourism: Year to Date – 2007-2012

Trip Characteristics, Jan-Sep period

	ALL TOURISM, Jan – Sep period						HOLIDAYS – Jan – Sep period						VFR – Jan – Sep period						BUSINESS – Jan – Sep period					
Av. Trip Length	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	3.27	3.34	3.30	3.21	3.18	3.18	3.95	3.90	3.86	3.75	3.74	3.70	2.78	2.91	2.81	2.78	2.72	2.79	2.37	2.40	2.42	2.34	2.27	2.41
England	3.15	3.21	3.15	3.07	3.05	3.06	3.80	3.73	3.75	3.64	3.59	3.57	2.72	2.86	2.67	2.65	2.65	2.68	2.31	2.33	2.32	2.22	2.18	2.39
Av. £/Night	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	£53	£54	£54	£54	£58	£61	£53	£56	£54	£56	£60	£64	£35	£37	£37	£36	£39	£40	£100	£102	£101	£95	£105	£100
England	£53	£55	£54	£55	£58	£62	£55	£58	£55	£57	£61	£66	£34	£36	£37	£36	£38	£40	£98	£101	£101	£98	£107	£101
Av. £/Trip	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	£182	£177	£173	£184	£194	£211	£218	£207	£210	£225	£237	£96	£108	£104	£100	£105	£112	£236	£245	£244	£223	£239	£241
England	£166	£176	£172	£167	£178	£190	£208	£216	£206	£208	£219	£237	£93	£103	£99	£96	£101	£106	£226	£236	£235	£218	£233	£240

*Please note that the latest 2012 results are provisional and subject to minor changes in subsequent months due to the inclusion of trip-takers returning from late trips. Pre-2012 results are based on full-year data so will not change.
 **All expenditure figures are in HISTORIC PRICES.



Fieldwork: 12 Sep – 28 Oct
 TNS Face-to-Face Omnibus Survey
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