

Great Britain Tourism Survey

November 2012 Update



Summary – November 2012 Update

ALL TOURISM

- Compared to November last year, it was a strong performance for GB overnight domestic tourism in **November 2012** with an **increase in trips** (+31%), **nights** (+46%) **and spend** (+50%). November started with three weeks of cold but sunny weather across much of Britain. However, the fourth week was one of the wettest on record with flooding in many parts. It should be borne in mind that November is a relatively 'small volume month' in terms of domestic tourism therefore the sample sizes of trip taking are smaller in this month than during the April-October period. That said, the increases are statistically significant.
- **YTD GB trips and nights still demonstrate a negative trend.** Trips and bednights both reported decreases of -1%. Before taking account of inflation, YTD spend increased however to +5%.
- In volume terms, the 114 million GB trips taken during the January to November period in 2012 represented a fall of 1.6m on 2011 (115.6m). However, 2012 is currently performing better than 2010 (107.5m), 2009 (112m), 2008 (105m) and 2007 (109.7m).

HOLIDAYS

- Holidays in November 2012 reported a similar trend to all tourism. Compared with the same period in the previous year, there was an **increase in trips, nights and spend** of +33%, +36% and +55% respectively.
- **YTD holiday trips and nights continue to report decreases:** -2% and -4% respectively. However, consistent with the previous three months, **expenditure has seen a positive month** with a reported +5% increase (before taking account of inflation) indicating shorter but higher spending holidays.
- In 2012, GB holiday trips during January to November (54.5m) were lower than in 2011 (55.4m) and in 2009 (56.2m). However, 2012 is currently performing better than 2010 (52.6m), 2008 (47.8m) and 2007 (49.5m).

VISITING FRIENDS & RELATIVES

- Visits to friends and relatives in November 2012 also recorded a similar trend to all tourism and holidays. There was an **increase in trips** (+35%), **nights** (+54%) **and spend** (+87%).
- **YTD VFR reported a decrease on the same period in 2011 for trips** (-3%) and is **in line with the same period last year for nights** (0%). However, **expenditure reported an increase** of +7% (before taking account of inflation).
- VFR trips during the January to November period in 2012 (37.8m) have decreased on 2011 (39.1m) and 2007 (40.3m). However, 2012 is currently performing better than 2010 (36.6m), 2009 (37.1m) and 2008 (37.4m).

BUSINESS TOURISM

- Consistent with holiday and VFR tourism, business tourism **also performed well in November 2012, with trips, nights and expenditure increasing** by +15%, +29% and +18% respectively.
- **YTD results for business tourism have increased on the same period last year for trips, nights and spend** by +2%, +6% and +2% respectively. The increase in spend is before taking account of inflation.
- Business trips in 2012 (17.7m) are currently performing better than all previous years: 2011 (17.4m), 2010 (15.3m), 2009 (16m), 2008 (16.6m) and 2007 (17.1m).

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-Nov		
	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%	11.082	10.078	-9.1%	7.92	10.359	+30.8%				115.564	113.949	-1.4%
England	11.572	10.064	-13.0%	12.209	13.18	+8.0%	9.144	8.634	-5.6%	9.039	8.172	-9.6%	6.786	8.789	+29.5%				95.118	94.243	-0.9%
BEDNIGHTS	July			August			September			October			November			December			YTD - Jan-Nov		
	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%	30.862	27.356	-11.4%	17.334	25.272	+45.8%				355.065	350.398	-1.3%
England	39.442	37.425	-5.1%	46.254	50.925	+10.1%	25.815	26.489	+2.6%	24.28	21.428	-11.7%	14.38	21.145	+47.0%				280.677	279.291	-0.5%
EXPENDITURE	July			August			September			October			November			December			YTD - Jan-Nov		
	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%	£1,847	£1,923	+4.1%	£1,313	£1,969	+50.0%				£20,975	£22,028	+5.0%
England	£2,344	£2,180	-7.0%	£2,403	£2,704	+12.5%	£1,640	£1,697	+3.5%	£1,430	£1,563	+9.3%	£1,085	£1,677	+54.6%				£16,593	£17,923	+8.0%

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Fieldwork: 7 Nov – 16 Dec
 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-Nov		
	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%	4.844	4.648	-4.0%	2.456	3.254	+32.5%				55.412	54.448	-1.7%
England	6.293	5.124	-18.6%	7.057	7.94	+12.5%	4.504	4.427	-1.7%	3.852	3.687	-4.3%	2.068	2.648	+28.0%				43.752	43.251	-1.1%

BEDNIGHTS	July			August			September			October			November			December			YTD – Jan-Nov		
	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%	14.983	13.829	-7.7%	5.845	7.946	+35.9%				200.773	193.79	-3.5%
England	25.416	22.477	-11.6%	30.572	34.399	+12.5%	15.525	16.018	+3.2%	11.481	10.443	-9.0%	4.753	6.272	+32.0%				152.026	148.615	-2.2%

EXPENDITURE	July			August			September			October			November			December			YTD – Jan-Nov		
	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%	£967	£1,073	+11.0%	£512	£791	+54.5%				£12,319	£12,878	+4.5%
England	£1,589	£1,392	-12.4%	£1,632	£1,964	+20.3%	£945	£1,090	+15.3%	£757	£866	+14.4%	£433	£672	+55.2%				£9,482	£10,297	+8.6%

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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-Nov		
	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	4.633	+11.2%	3.726	3.251	-12.7%	3.836	3.379	-11.9%	3.204	4.309	+34.5%				39.097	37.841	-3.2%
England	3.577	3.1	-13.3%	3.522	3.891	+10.5%	3.136	2.809	-10.4%	3.221	2.905	-9.8%	2.87	3.678	+28.2%				33.67	32.727	-2.8%
BEDNIGHTS	July			August			September			October			November			December			YTD - Jan-Nov		
	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	15.5	+16.0%	8.477	8.771	+3.5%	10.2	9.271	-9.1%	6.791	10.487	+54.4%				104.051	103.864	-0.2%
England	10.096	9.309	-7.8%	11.45	12.563	+9.7%	6.803	7.162	+5.3%	8.224	7.785	-5.3%	5.937	8.869	+49.4%				87.382	86.608	-0.9%
EXPENDITURE	July			August			September			October			November			December			YTD - Jan-Nov		
	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%	£435	£423	-2.8%	£384	£418	+8.9%	£306	£571	+86.6%				£4,066	£4,355	+7.1%
England	£424	£348	-17.9%	£394	£441	+11.9%	£343	£348	+1.5%	£307	£350	+14.0%	£271	£478	+76.4%				£3,376	£3,597	+6.5%

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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-Nov		
	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%	1.952	1.778	-8.9%	1.994	2.3	+15.3%				17.396	17.675	+1.6%
England	1.391	1.399	+0.6%	1.382	1.067	-22.8%	1.284	1.02	-20.6%	1.582	1.371	-13.3%	1.599	2.039	+27.5%				14.656	14.832	+1.2%
BEDNIGHTS	July			August			September			October			November			December			YTD - Jan-Nov		
	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%	4.75	3.765	-20.7%	3.976	5.114	+28.6%				39.265	41.592	+5.9%
England	2.788	3.683	+32.1%	3.466	3.242	-6.5%	3.065	2.255	-26.4%	3.814	2.841	-25.5%	3.027	4.472	+47.7%				31.895	34.564	+8.4%
EXPENDITURE	July			August			September			October			November			December			YTD - Jan-Nov		
	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%	£447	£386	-13.6%	£446	£526	+17.9%				£4,109	£4,187	+1.9%
England	£292	£367	+25.7%	£340	£253	-25.6%	£316	£192	-39.2%	£327	£312	-4.6%	£338	£455	+34.6%				£3,339	£3,508	+5.1%

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Fieldwork: 7 Nov – 16 Dec
 TNS Face-to-Face Omnibus Survey
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GB Domestic Tourism: Year to Date – 2007-2012

Trips, Bednights & Expenditure, Jan-Nov period

	ALL TOURISM, Jan – Nov period						HOLIDAYS – Jan – Nov period						VFR – Jan – Nov period						BUSINESS – Jan – Nov 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	109.723	104.922	111.972	107.465	115.564	113.949	49.457	47.776	56.204	52.617	55.412	54.448	40.247	37.369	37.074	36.601	39.097	37.841	17.097	16.563	16.034	15.265	17.396	17.675
England	90.716	86.609	93.161	88.612	95.118	94.243	39.025	37.598	44.732	41.669	43.752	43.251	34.965	32.283	32.520	31.864	33.67	32.727	14.341	14.012	13.688	12.601	14.656	14.832
	ALL TOURISM, Jan – Nov period						HOLIDAYS – Jan – Nov period						VFR – Jan – Nov period						BUSINESS – Jan – Nov period					
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	350.025	339.596	356.762	336.123	355.065	350.398	189.035	180.739	209.608	191.475	200.773	193.79	110.018	105.672	101.486	100.061	104.051	103.864	40.960	39.549	38.212	35.660	39.265	41.592
England	278.626	269.847	284.020	264.604	280.677	279.291	143.733	135.933	161.936	146.929	152.026	148.615	93.645	89.643	84.912	82.561	87.382	86.608	33.074	32.521	31.267	28.392	31.895	34.564
	ALL TOURISM, Jan – Nov period						HOLIDAYS – Jan – Nov period						VFR – Jan – Nov period						BUSINESS – Jan – Nov period					
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	£18,677	£18,852	£19,518	£18,581	£20,975	£22,028	£10,335	£10,374	£11,519	£11,012	£12,319	£12,878	£3,924	£4,010	£3,790	£3,721	£4,066	£4,355	£3,982	£4,015	£3,868	£3,442	£4,109	£4,187
England	£14,880	£15,008	£15,775	£14,852	£16,593	£17,923	£8,056	£8,047	£9,107	£8,609	£9,482	£10,297	£3,290	£3,319	£3,180	£3,117	£3,376	£3,597	£3,204	£3,280	£3,201	£2,798	£3,339	£3,508

*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: 7 Nov – 16 Dec
 TNS Face-to-Face Omnibus Survey
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GB Domestic Tourism: Year to Date – 2007-2012

Trip Characteristics, Jan-Nov period

	ALL TOURISM, Jan – Nov period						HOLIDAYS – Jan – Nov period						VFR – Jan – Nov period						BUSINESS – Jan – Nov 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	3.19	3.24	3.19	3.13	3.07	3.08	3.82	3.78	3.73	3.64	3.62	3.56	2.73	2.83	2.74	2.73	2.66	2.74	2.40	2.39	2.38	2.34	2.26	2.35
England	3.07	3.12	3.05	2.99	2.95	2.96	3.68	3.62	3.62	3.53	3.47	3.44	2.68	2.78	2.61	2.59	2.60	2.65	2.31	2.32	2.28	2.25	2.18	2.33
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	£56	£55	£55	£59	£63	£55	£57	£55	£58	£61	£66	£36	£38	£37	£37	£39	£42	£97	£102	£101	£97	£105	£101
England	£53	£56	£56	£56	£59	£64	£56	£59	£56	£59	£62	£69	£35	£37	£37	£38	£39	£42	£97	£101	£102	£99	£105	£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	£170	£180	£174	£173	£182	£193	£209	£217	£205	£209	£222	£237	£97	£107	£102	£102	£104	£115	£233	£242	£241	£225	£236	£237
England	£164	£173	£169	£168	£174	£190	£206	£214	£204	£207	£217	£238	£94	£103	£98	£98	£100	£110	£223	£234	£234	£222	£228	£237

*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.
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