

# Great Britain Tourism Survey April 2012 Update



# Summary – April 2012 Update

## ALL TOURISM

- Apr 2012 showed decreases in trips and nights (-7% and -13%, respectively). However, spend increased by +2% compared to Apr 2011. One possible reason for the fall in tourism is that it was the wettest April recorded in the UK in over 100 years. It was also the coldest April recorded in over 20 years with snowfall in some parts of England.
- As a result, YTD GB trips, nights and spend followed a similar trend. Trips and bednights reported decreases of -3% and -7% YTD, whereas spend has increased by +5%.
- In volume terms, GB trips during Jan-Apr 2012 (32.9m) fell by 1.1m trips on 2011 (34.0m). The number of trips during other years were lower: 2010 (32.4m), 2009 (31.7m), 2008 (31.9m) and 2007 (32.4m).

## HOLIDAYS

- Holidays experienced a poor month with trips, nights and spend during the month reporting decreases of -9%, -16% and -6% respectively compared to Apr 2011. With the Easter holidays falling in April in both 2011 and 2012 allowing for a like-for-like comparison, it's likely that the Royal Wedding and May Day bank holiday, which all fell within consecutive weeks, contributed to last year being an extremely good month for holidays. It's also likely that the poor weather contributed further to a decline in holiday trips in 2012.
- YTD holidays in GB reported similar results as overall tourism with trips and bednights reporting decreases of -2% and -7%, respectively, whereas spend saw an increase of +2%.
- In 2012, GB trips during Jan-Apr (13.6m) were lower than in 2011 (13.9m). However, 2012 is currently outperforming other years which showed a lower volume of trips: 2010 (12.6m), 2009 (13.0m), 2008 (11.4m) and 2007 (11.6m).

## VISITING FRIENDS & RELATIVES

- For the second successive year, visiting friends and relatives in April performed poorly with decreases in trips and nights of -12% and -17%, respectively. However, spend increased by +2%.
- YTD VFR is the only category reporting a decrease on the same period in 2011 across trips, bednights and spend: -9%, -8% and -1%, respectively.
- VFR trips during the first four months of 2012 (12.1m) have decreased on 2011 (13.2m). All other years reported higher trip volumes than 2012: 2010 (13.3m), 2009 (12.4m), 2008 (13.2m) and 2007 (13.5m).

## BUSINESS TOURISM

- In contrast to the other types of tourism, business tourism is the only category which had a positive month with trips, bednights and spend increasing by +13%, +9% and +40%, respectively, indicating far higher spending trips. It's likely that business tourism in Apr 2011 was impacted by the increase in holiday tourism due to the Royal Wedding and bank holidays.
- As a result, YTD business trips reported increases of +5%, +6% and +17% in trips, nights and spend.
- Consequently, business trips in 2012 (5.9m) are at their highest level since 2008 (6.0m). The volumes for other years are: 2011 (5.6m), 2010 (5.6m), 2009 (5.3m) and 2007 (6.3m).

# England Domestic Tourism: Monthly Volume & Value 2012

## ALL TOURISM

	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
<b>TRIPS</b>																		
GB	6.024	6.294	+4.5%	8.011	6.711	-16.2%	8.029	8.793	+9.5%	11.963	11.150	-6.8%						
England	5.139	5.398	+5.0%	6.690	5.698	-14.8%	6.624	7.501	+13.2%	9.916	9.036	-8.9%						
<b>BEDNIGHTS</b>																		
GB	14.822	14.669	-1.0%	20.051	14.878	-25.8%	20.677	24.334	+17.7%	37.424	32.577	-13.0%						
England	12.615	12.287	-2.6%	16.411	12.448	-24.1%	16.923	20.275	+19.8%	30.050	25.485	-15.2%						
<b>EXPENDITURE</b>																		
GB	£923	£1,017	+10.2%	£1,215	£1,117	-8.1%	£1,289	£1,524	+18.2%	£2,043	£2,087	+2.2%						
England	£755	£877	+16.2%	£981	£918	-6.4%	£1,066	£1,264	+18.6%	£1,645	£1,663	+1.1%						

	July			August			September			October			November			December			YTD – Jan-Apr		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
<b>TRIPS</b>																					
GB																			34.026	32.948	-3.2%
England																			28.369	27.633	-2.6%
<b>BEDNIGHTS</b>																					
GB																			92.974	86.458	-7.0%
England																			75.999	70.496	-7.2%
<b>EXPENDITURE</b>																					
GB																			£5,469	£5,744	+5.0%
England																			£4,447	£4,722	+6.2%

\*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: 11 Apr - 27 May 2012  
 TNS Face-to-Face Omnibus Survey  
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# England Domestic Tourism: Monthly Volume & Value 2012

## HOLIDAYS

	January			February			March			April			May			June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
<b>TRIPS</b>																		
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%						
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%						
<b>BEDNIGHTS</b>																		
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%						
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%						
<b>EXPENDITURE</b>																		
GB	£326	£418	+28.2%	£552	£481	-12.9%	£636	£748	+17.6%	£1,308	£1,231	-5.9%						
England	£265	£345	+30.2%	£416	£372	-10.6%	£495	£622	+25.7%	£1,018	£980	-3.7%						

	July			August			September			October			November			December			YTD – Jan-Apr		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
<b>TRIPS</b>																					
GB																			13.943	13.623	-2.3%
England																			11.105	10.877	-2.1%
<b>BEDNIGHTS</b>																					
GB																			41.545	38.696	-6.9%
England																			32.108	30.109	-6.2%
<b>EXPENDITURE</b>																					
GB																			£2,822	£2,878	+2.0%
England																			£2,193	£2,318	+5.7%

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# England 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
<b>TRIPS</b>																		
<b>GB</b>	2.854	2.666	-6.6%	3.552	2.732	-23.1%	2.887	3.188	+10.4%	3.937	3.483	-11.5%						
<b>England</b>	2.489	2.370	-4.8%	3.139	2.397	-23.6%	2.477	2.863	+15.6%	3.386	2.949	-12.9%						
<b>BEDNIGHTS</b>																		
<b>GB</b>	6.210	6.053	-2.5%	8.666	6.319	-27.1%	7.761	9.528	+22.8%	11.803	9.780	-17.1%						
<b>England</b>	5.368	5.178	-3.5%	7.441	5.323	-28.5%	6.773	8.390	+23.9%	9.770	7.887	-19.3%						
<b>EXPENDITURE</b>																		
<b>GB</b>	£254	£243	-4.3%	£316	£268	-15.2%	£299	£336	+12.4%	£376	£382	+1.6%						
<b>England</b>	£213	£210	-1.4%	£279	£220	-21.1%	£252	£300	+19.0%	£315	£301	-4.4%						

	July			August			September			October			November			December			YTD – Jan-Apr		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
<b>TRIPS</b>																					
<b>GB</b>																			13.231	12.069	-8.8%
<b>England</b>																			11.491	10.578	-7.9%
<b>BEDNIGHTS</b>																					
<b>GB</b>																			34.441	31.680	-8.0%
<b>England</b>																			29.351	26.778	-8.8%
<b>EXPENDITURE</b>																					
<b>GB</b>																			£1,246	£1,229	-1.4%
<b>England</b>																			£1,059	£1,032	-2.5%

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# England 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%						
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%						
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%						
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%						
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%						
England	£233	£290	+24.5%	£260	£276	+6.2%	£291	£300	+3.1%	£266	£342	+28.6%						

TRIPS	July			August			September			October			November			December			YTD – Jan-Apr		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB																			5.618	5.882	+4.7%
England																			4.828	5.003	+3.6%
BEDNIGHTS	July			August			September			October			November			December			YTD – Jan-Apr		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB																			12.394	13.143	+6.0%
England																			10.551	11.206	+6.2%
EXPENDITURE	July			August			September			October			November			December			YTD – Jan-Apr		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB																			£1,228	£1,442	+17.4%
England																			£1,050	£1,208	+15.0%

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# England Domestic Tourism: Year to Date – 2007-2012

## Trips, Bednights & Expenditure, April

	<b>ALL TOURISM, Jan – Apr period</b>						<b>HOLIDAYS – Jan – Apr period</b>						<b>VFR – Jan – Apr period</b>						<b>BUSINESS – Jan – Apr period</b>					
	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012	2007	2008	2009	2010	2011	2012
<b>TRIPS</b>																								
GB	32.424	31.892	31.655	32.448	34.026	32.948	11.629	11.353	13.036	12.557	13.943	13.623	13.514	13.243	12.390	13.274	13.231	12.069	6.310	5.984	5.335	5.646	5.618	5.882
England	27.068	26.708	26.842	26.912	28.369	27.633	9.260	9.156	10.471	9.877	11.105	10.877	11.724	11.367	11.001	11.530	11.491	10.578	5.307	5.130	4.588	4.685	4.828	5.003
<b>BEDNIGHTS</b>																								
GB	87.066	92.031	89.952	86.951	92.974	86.458	35.484	35.705	41.593	37.917	41.545	38.696	35.190	37.032	33.413	34.121	34.441	31.680	13.176	14.079	12.581	11.861	12.394	13.143
England	69.258	75.413	74.053	68.764	75.999	70.496	26.163	27.550	32.777	29.395	32.108	30.109	30.191	31.722	28.718	28.144	29.351	26.778	10.766	12.061	10.602	9.387	10.551	11.206
<b>EXPENDITURE</b>																								
GB	£5,068	£5,320	£5,109	£5,019	£5,469	£5,744	£2,181	£2,356	£2,469	£2,394	£2,822	£2,878	£1,199	£1,334	£1,208	£1,196	£1,246	£1,229	£1,516	£1,465	£1,304	£1,261	£1,228	£1,442
England	£4,067	£4,341	£4,200	£4,051	£4,447	£4,722	£1,674	£1,872	£1,995	£1,911	£2,193	£2,318	£1,020	£1,086	£1,035	£991	£1,059	£1,032	£1,248	£1,250	£1,067	£1,023	£1,050	£1,208

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# England Domestic Tourism: Year to Date – 2007-2012

## Trip Characteristics, Jan-Apr period

Av. Trip Length	ALL TOURISM, Jan – Apr period						HOLIDAYS – Jan – Apr period						VFR – Jan – Apr period						BUSINESS – Jan – Apr 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	2.69	2.89	2.84	2.68	2.73	2.62	3.05	3.14	3.19	3.02	2.98	2.84	2.60	2.80	2.70	2.57	2.60	2.62	2.09	2.35	2.36	2.10	2.21	2.23
England	2.56	2.82	2.76	2.56	2.68	2.55	2.83	3.01	3.13	2.98	2.89	2.77	2.58	2.79	2.61	2.44	2.55	2.53	2.03	2.35	2.31	2.00	2.19	2.24
Av. £ / Night	ALL TOURISM, Jan – Apr period						HOLIDAYS – Jan – Apr period						VFR – Jan – Apr period						BUSINESS – Jan – Apr 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	£58	£58	£57	£58	£59	£66	£61	£66	£59	£63	£68	£74	£34	£36	£36	£35	£36	£39	£115	£104	£104	£106	£99	£110
England	£59	£58	£57	£59	£59	£67	£64	£68	£61	£65	£68	£77	£34	£34	£36	£35	£36	£39	£116	£104	£101	£109	£100	£108
Av. £ / Trip	ALL TOURISM, Jan – Apr period						HOLIDAYS – Jan – Apr period						VFR – Jan – Apr period						BUSINESS – Jan – Apr 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	£156	£167	£161	£155	£161	£174	£188	£208	£189	£191	£202	£211	£89	£101	£97	£90	£94	£102	£240	£245	£244	£223	£219	£245
England	£150	£163	£156	£151	£157	£171	£181	£204	£191	£193	£197	£213	£87	£96	£94	£86	£92	£98	£235	£244	£233	£218	£217	£241

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