

## GB TOURISM SURVEY - August 2012

### SUMMARY OF RESULTS

#### 1. Headlines

- There were 16.2 million domestic overnight trips in Great Britain in August, an increase of 8% from 15.0 million trips in 2011.
- Spend increased by 7%, and the number of bednights increased by 6%.
- A similar pattern was seen in England. The volume of trips increased by 8% (from 12.2 million in 2011 to 13.2 million), with spend increasing by 12% and the number of bednights by 9%.
- In the year to date (January to August), the number of trips and nights in GB has decreased (down 3 and 4% respectively), while expenditure was up by 2% on 2011.
- In the past 12 months, there were 4.3 million more trips taken in Great Britain compared with the same period the year before, an increase of 4%.

#### 2. Context

- The weather picture was mixed across the country, with some areas drier than normal and others receiving heavy rain. The average temperature was above the long term average after an exceptionally cool and wet June-July period.
- The Olympic Games took place between the 27<sup>th</sup> of July and the 12<sup>th</sup> of August, with the Paralympic Games taking place between the 29<sup>th</sup> of August and the 9<sup>th</sup> of September. These events may have affected trip-taking patterns.

#### 3. Trip Characteristics

- Between January and August 2012, the number of holiday trips in Great Britain decreased by 3%, from 42.5 million to 41.1 million, with nights also down by 6%. Spend, on the other hand, saw a very slight increase of 1%.
- The number of longer holiday trips (4+ nights) taken has declined more steeply (down 7%) than shorter, 1-3 night breaks (down 1%).
- The volume of trips and nights to visit friends and relatives (VFR) has also decreased so far this year (down 5% and 4%), with spend remaining flat.
- However, in the year so far business trips increased from 11.9 million last year to 12.3 million this year (up 3%). Expenditure on business trips has increased 6%, and business nights are up by 10% from 26.8 million to 29.4 million this year.
- Of all destination types, trips to the countryside have seen the greatest decline in trip numbers, falling by 6%. In contrast, trips to large towns and cities were actually up 2% on 2011, with spend also up by 5%.
- Serviced accommodation is performing better than average, with overnight stays involving B&B's in particular up 14%. In contrast, camping and caravans trips were down by 7% on the same period last year.

#### 4. Overseas Travel by UK Residents

- Trips abroad by UK residents saw a very slight decrease in August compared to the same time last year (1%), with year to date trips down by the same proportion (1%). The amount spent has, however, remained above 2011 levels, up 6% in August and 4% for the year to date.

#### 5. Other Tourism Surveys

- August results from the England Occupancy Survey saw a slight increase of 1% in room occupancy in serviced accommodation, with bedspace occupancy flat against August 2011.

## KEY MEASURES



### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
<b>August '12</b>									
GB	15.0	16.2	+8%	59.2	62.8	+6%	3,129	3,352	+7%
England	12.2	13.2	+8%	46.3	50.4	+9%	2,403	2,702	+12%
<b>Jan-August'12</b>									
GB	85.4	83.1	-3%	274.4	262.5	-4%	15,719	16,056	+2%
England	70.1	68.6	-2%	216.2	209.7	-3%	12,438	12,984	+4%

### Purpose of Trip – August 2012

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
<b>GB</b>									
Holiday	9.0	10.0	+11%	40.9	43.4	+6%	2,204	2,464	+12%
Business	1.6	1.2	-25%	4.1	3.2	-21%	392	283	-28%
VFR	4.2	4.6	+11%	13.4	15.3	+15%	487	554	+14%
<b>England</b>									
Holiday	7.1	7.9	+13%	30.6	34.4	+13%	1,632	1,964	+20%
Business	1.4	1.1	-23%	3.5	2.9	-16%	340	252	-26%
VFR	3.5	3.9	+10%	11.5	12.4	+8%	394	441	+12%

### Purpose of Trip – Year to Date (January – August 2012)

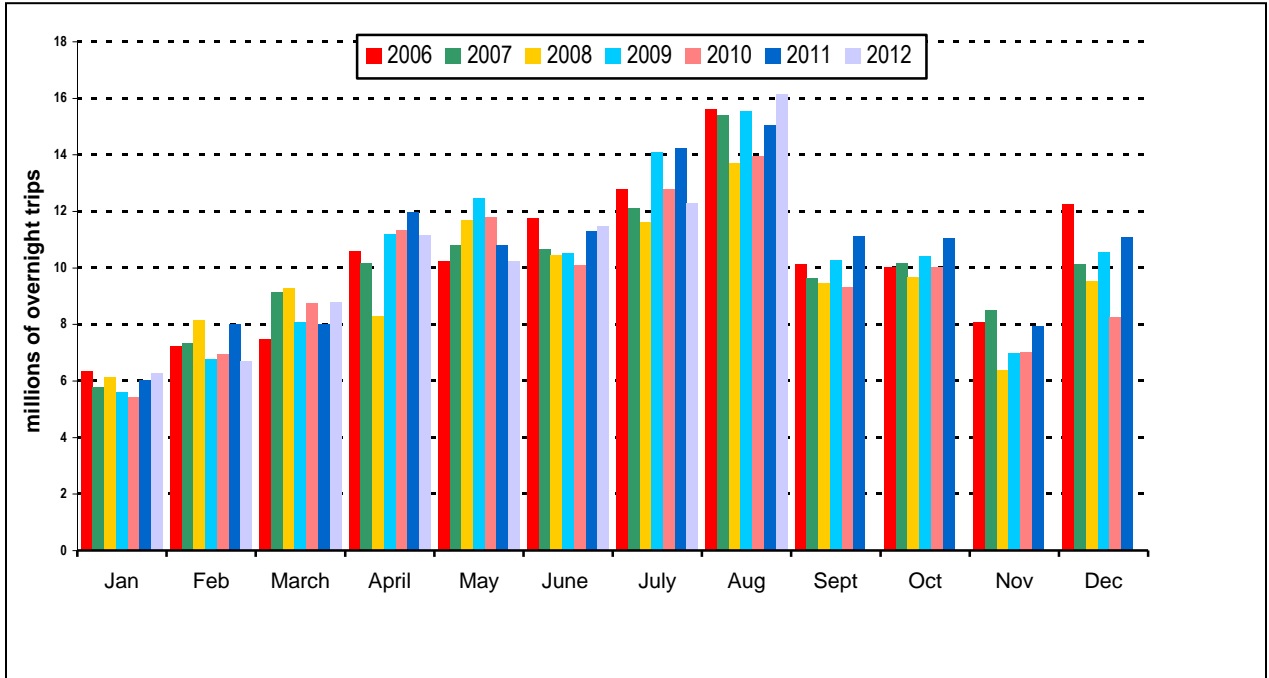
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
<b>GB</b>									
Holiday	42.5	41.1	-3%	160.3	150.2	-6%	9,595	9,678	+1%
Business	11.9	12.3	+3%	26.8	29.4	+10%	2,845	3,024	+6%
VFR	28.3	26.9	-5%	78.6	75.1	-4%	2,940	2,942	0%
<b>England</b>									
Holiday	33.3	32.5	-3%	120.3	115.9	-4%	7,347	7,670	+4%
Business	10.2	10.4	+2%	22.0	24.7	+12%	2,358	2,547	+8%
VFR	24.4	23.3	-5%	66.4	62.6	-6%	2,454	2,420	-1%

### Outbound Travel – UK Residents

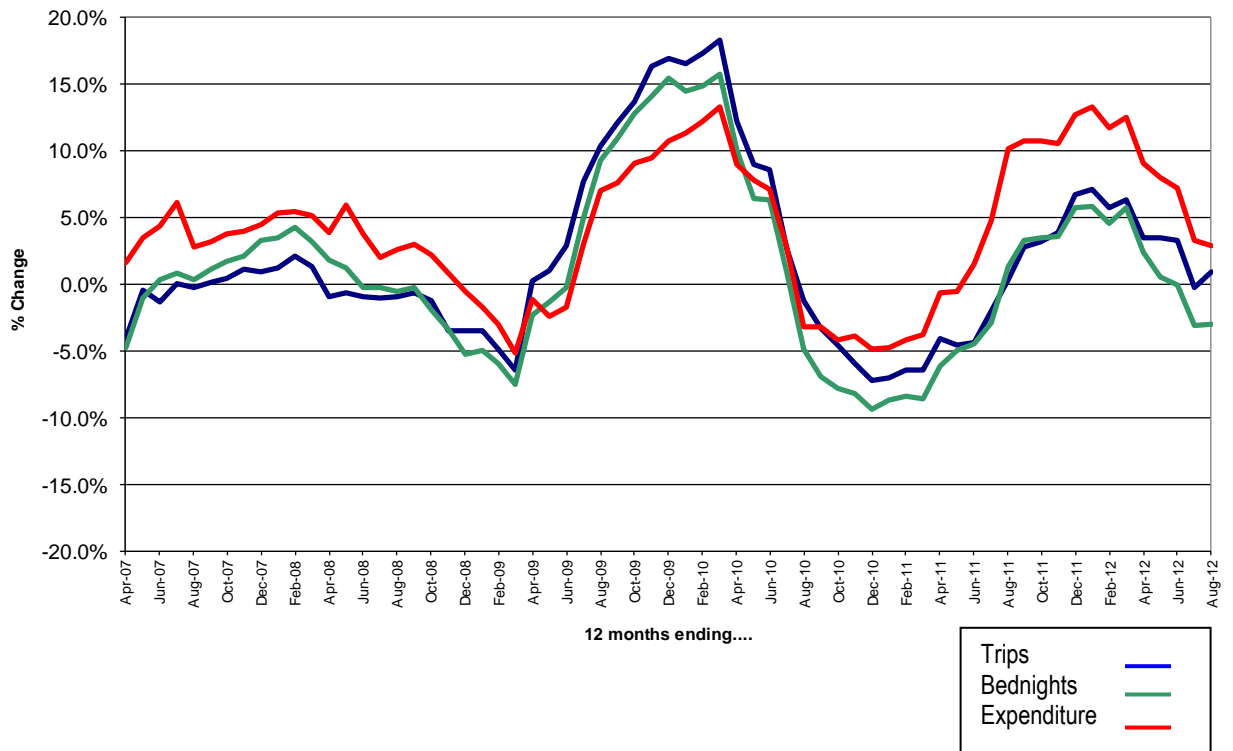
	TRIPS (MILLIONS)			SPEND (£BN)		
	2011	2012	% +/-	2011	2012	% +/-
<b>August</b>	7.3	7.3	-1%	4.3	4.5	+6%
<b>January-August</b>	39.0	38.8	-1%	21.7	22.6	+4%
<b>Sept '11 – Aug '12</b>	56.2	56.6	+1%	31.3	32.6	+4%

## 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 (August 2011 vs. August 2012)
- Year to date (January–August 2011 vs. January– August 2012)
- 12 month rolling (Sept 2010 – August 2011 vs. Sept 2011– August 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.

# YEAR-ON-YEAR COMPARISON, BY TRIP CHARACTERISTIC

GBTS: Comparisons with equivalent periods, 2011

Comparisons with equivalent periods, 2011

LEGEND:	Above Average Performance	Average Performance	Below Average Performance

**NOTE:** In the tables below, 'average performance' refers to the total trips/rights/expenditure to either GB or England in each time period. Those cells marked 'above average performance' indicate where the percentage change is more than 5 percentage points above the average; those marked 'below average performance' indicate where the percentage change is more than 5 percentage points below the average. These changes are not necessarily statistically significant - they only indicate those cells where changes are further away from the average. The numbers of unweighted trips are also displayed to indicate where sample sizes are relatively small. Where there are 75 or fewer unweighted trips, the % change figures have been greyed out to indicate that they should be treated with caution.

	Great Britain											
	Month: August 2012			YTD: January - August 2012			12 month rolling September 2011 - August 2012			Unweighted Trips		
	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure
<b>TOTAL</b>	7.5%	6.1%	7.1%	2511	-2.7%	-4.3%	2.1%	12252	3.5%	0.3%	5.7%	17574
<b>PURPOSE:</b>												
Pure Holiday	11.1%	6.2%	11.8%	1568	-3.2%	-6.3%	0.9%	6255	0.9%	-3.0%	2.9%	6412
- 1-3 nights holiday	17.9%	16.5%	17.9%	785	-0.8%	-2.3%	5.5%	3739	3.8%	2.0%	6.7%	5205
- 4+ nights holiday	4.7%	3.4%	8.8%	784	-7.0%	-8.2%	-3.2%	2517	-3.9%	-5.5%	-0.8%	3206
VFR (on holiday)	16.2%	17.9%	22.0%	473	-0.8%	-1.9%	2.1%	2308	9.4%	6.5%	7.1%	3535
HOLIDAY (TOTAL)	12.2%	8.3%	13.1%	2041	-2.6%	-5.3%	1.0%	8563	3.3%	-0.6%	3.6%	11947
VFR (non-holiday)	3.3%	8.0%	-1.1%	273	-9.8%	-7.9%	-2.7%	1861	-0.3%	-2.3%	6.9%	2983
VFR (TOTAL)	11.1%	14.5%	13.8%	746	-5.1%	-4.4%	0.1%	4169	4.7%	2.7%	7.0%	6518
Business	-25.1%	-20.8%	-27.8%	151	2.9%	9.8%	6.3%	1469	6.9%	12.7%	10.0%	2137
<b>Regions:</b>												
West Midlands	-18.1%	5.9%	-30.0%	126	-2.6%	2.6%	-3.0%	751	2.4%	-1.4%	-1.6%	1117
East of England	-1.5%	1.8%	0.9%	205	-10.1%	-3.8%	8.1%	941	0.7%	3.6%	11.3%	1378
East Midlands	-1.2%	0.7%	1.2%	158	-11.2%	-13.3%	-4.9%	816	-1.7%	-5.3%	2.9%	1164
London	37.0%	18.3%	25.8%	194	7.4%	0.2%	6.8%	1075	6.5%	6.5%	0.3%	1578
North West	-5.7%	-19.8%	-9.3%	256	3.6%	2.8%	9.6%	1368	9.1%	5.9%	16.6%	2000
North East	11.4%	5.0%	4.4%	83	1.7%	-8.5%	15.8%	425	6.5%	-4.1%	20.5%	616
South East	-3.9%	-3.1%	-2.1%	321	-0.1%	-2.0%	4.7%	1676	5.2%	4.2%	8.8%	2345
South West	24.3%	28.1%	46.3%	530	-4.0%	-4.3%	0.2%	2118	-1.0%	-3.7%	0.6%	2903
Yorkshire & the Humber	17.6%	14.2%	18.5%	212	2.2%	-0.3%	8.6%	1096	16.3%	11.5%	13.5%	1652
<b>LOCATION TYPE:</b>												
Seaside	20.8%	23.2%	35.3%	780	-2.6%	-4.0%	1.0%	2817	2.6%	0.7%	2.9%	3775
Large city/ large town	15.6%	19.3%	8.2%	791	1.7%	2.7%	5.4%	4580	7.7%	9.1%	9.7%	6849
Small town	-3.5%	-3.0%	-5.8%	531	-4.6%	-7.0%	0.0%	2844	1.2%	-5.6%	2.0%	4110
Countryside/village	-7.4%	-17.2%	-16.2%	495	-5.9%	-10.4%	-0.6%	2355	0.5%	-5.2%	4.6%	3274
<b>AGE:</b>												
16-24	-9.0%	-5.3%	6.9%	214	-9.7%	-7.4%	-2.7%	1373	-3.0%	-4.5%	0.8%	2025
25-34	41.7%	43.8%	41.3%	542	8.4%	9.8%	18.7%	2208	12.3%	15.5%	16.2%	3124
35-44	-1.2%	-3.2%	-2.1%	593	-13.0%	-12.9%	-10.3%	2627	-2.5%	-7.7%	-1.7%	3767
45-54	8.3%	1.6%	9.1%	463	4.9%	0.1%	8.9%	2286	5.7%	2.0%	9.0%	3117
55+	2.5%	5.5%	-1.4%	700	-2.3%	-5.5%	1.1%	3757	5.1%	0.4%	5.8%	5541
<b>SEG:</b>												
AB	18.3%	22.4%	18.0%	855	-0.4%	-0.5%	4.2%	4130	4.8%	2.9%	6.1%	5868
C1	-7.7%	-6.2%	-12.1%	736	-5.9%	-5.7%	-4.3%	3730	2.1%	-1.1%	-0.5%	5457
C2	17.2%	5.7%	17.9%	457	1.2%	-3.9%	6.7%	2177	6.4%	1.7%	13.5%	3063
DE	6.3%	0.3%	18.6%	463	-6.8%	-10.9%	7.4%	2215	-0.2%	-4.0%	12.1%	3187
<b>CHILDREN IN HH:</b>												
Any	9.3%	3.3%	9.6%	1166	-2.5%	-3.5%	4.0%	4575	3.6%	-1.1%	7.7%	6434
None	6.2%	8.6%	5.6%	1346	-2.8%	-4.8%	1.4%	7676	3.5%	1.0%	5.0%	11140
<b>ACCOMMODATION:</b>												
Commercial accom	6.7%	4.1%	9.8%	1649	1.2%	-2.2%	3.8%	7648	4.9%	0.5%	6.1%	10449
- Serviced accom	2.5%	1.8%	5.1%	810	4.7%	4.9%	7.9%	4940	9.5%	8.6%	10.8%	7122
- Hotel/motel/guesthouse	3.0%	6.4%	8.2%	697	4.3%	4.5%	7.1%	4367	9.3%	9.1%	10.4%	6339
- Bed & Breakfast	0.1%	-18.6%	-14.8%	104	14.4%	13.1%	24.7%	549	15.4%	9.9%	19.7%	748
Total self-catering rented	9.6%	2.7%	13.6%	801	-5.0%	-7.9%	-4.6%	2518	-4.0%	-6.9%	-4.0%	3063
- Camping & Caravanning (inc. owned caravans)	20.0%	12.5%	16.3%	610	-6.7%	-5.9%	-3.0%	1869	-3.6%	-3.2%	0.0%	2268
- Other self-catering rented	-9.3%	-10.7%	10.2%	277	-5.1%	-12.7%	-7.2%	995	-6.2%	-12.9%	-7.5%	1239
Hostels	42.3%	55.2%	44.4%	33	9.6%	10.1%	22.4%	148	-2.3%	7.3%	5.1%	190
Own home/friends'/relatives'	12.2%	13.9%	1.5%	875	-8.6%	-7.8%	-7.2%	4471	2.0%	-0.2%	2.5%	6913

	England											
	Month: August 2012			YTD: January - August 2012			12 month rolling September 2011 - August 2012			Unweighted Trips		
	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure
<b>TOTAL</b>	7.9%	8.9%	12.4%	2047	-2.2%	-3.0%	4.4%	10119	4.0%	1.6%	6.8%	14528
<b>PURPOSE:</b>												
Pure Holiday	12.5%	12.5%	20.3%	1244	-2.5%	-3.6%	4.4%	4942	1.2%	-1.0%	5.2%	6681
- 1-3 nights holiday	13.4%	10.7%	13.5%	626	-2.0%	-4.4%	6.3%	2963	2.7%	0.1%	7.0%	4185
- 4+ nights holiday	11.5%	13.1%	24.4%	619	-3.5%	-3.3%	2.5%	1957	-1.4%	-1.6%	3.3%	2489
VFR (on holiday)	8.5%	2.2%	16.7%	379	-2.8%	-6.7%	-1.5%	1953	8.7%	5.3%	4.3%	2990
HOLIDAY (TOTAL)	11.6%	10.4%	19.9%	1623	-2.6%	-4.4%	3.4%	6892	3.4%	0.6%	5.0%	9670
VFR (non-holiday)	13.5%	19.7%	3.5%	247	-6.5%	-4.5%	-1.2%	1663	1.3%	0.2%	7.0%	2641
VFR (TOTAL)	10.4%	7.9%	11.9%	626	-4.5%	-5.8%	-1.4%	3616	5.1%	3.0%	5.5%	5632
Business	-23.2%	-15.8%	-25.9%	136	2.0%	12.2%	8.0%	1243	5.9%	12.5%	8.9%	1775
<b>Regions:</b>												
West Midlands	-18.1%	5.9%	-30.0%	126	-2.6%	2.6%	-3.0%	751	2.4%	-1.4%	-1.6%	1117
East of England	-1.5%	1.8%	0.9%	205	-10.1%	-3.8%	8.1%	941	0.7%	3.6%	11.3%	1378
East Midlands	-1.2%	0.7%	1.2%	158	-11.2%	-13.3%	-4.9%	816	-1.7%	-5.3%	2.9%	1164
London	37.0%	18.3%	25.8%	194	7.4%	0.2%	6.8%	1075	6.5%	6.5%	0.3%	1578
North West	-5.7%	-19.8%	-9.3%	256	3.6%	2.8%	9.6%	1368	9.1%	5.9%	16.6%	2000
North East	11.4%	5.0%	4.4%	83	1.7%	-8.5%	15.8%	425	6.5%	-4.1%	20.5%	616
South East	-3.9%	-3.1%	-2.1%	321	-0.1%	-2.0%	4.7%	1676	5.2%	4.2%	8.8%	2345
South West	24.3%	28.1%	46.3%	530	-4.0%	-4.3%	0.2%	2118	-1.0%	-3.7%	0.6%	2903
Yorkshire & the Humber	17.6%	14.2%	18.5%	212	2.2%	-0.3%	8.6%	1096	16.3%	11.5%	13.5%	1652
<b>LOCATION TYPE:</b>												
Seaside	18.5%	26.4%	38.8%	621	-2.8%	-0.2%	3.1%	2248	2.3%	4.2%	4.0%	3028
Large city/ large town	14.0%	14.6%	9.5%	657	2.1%	2.6%	6.9%	3946	8.0%	8.8%	11.1%	5891
Small town	-0.3%	0.0%	1.5%	425	-4.7%	-8.7%	-0.7%	2264	0.9%	-6.1%	-0.3%	3275
Countryside/village	-3.3%	-9.9%	-8.4%	409	-4.6%	-7.8%	6.0%	1908	2.0%	-3.5%	7.7%	2652
<b>AGE:</b>												
16-24	-4.7%	2.7%	30.3%	179	-10.3%	-7.6%	-0.4%	1157	-4.3%	-3.3%	1.7%	1704
25-34	36.1%	30.9%	34.1%	436	12.5%	13.4%	21.3%	1851	16.0%	18.4%	19.2%	2626
35-44	-0.2%	0.1%	4.7%	499	-11.1%	-9.7%	-4.1%	2219	-2.4%	-5.3%	0.8%	3130
45-54	9.7%	11.2%	18.7%	372	3.6%	4.1%	10.3%	1854	5.5%	4.3%	8.7%	2538
55+	3.0%	7.8%	0.6%	561	-2.8%	-7.3%	0.6%	3037	5.4%	-0.2%	5.8%	4532
<b>SEG:</b>												
AB	21.1%	33.8%	29.1%	698	-0.5%	0.7%	7.5%	3427	4.7%	3.6%	8.2%	4881
C1	-8.7%	-5.8%	-13.7%	607	-5.7%	-6.7%	-5.1%	3100	2.1%	-2.2%	-2.7%	4532
C2	7.0%	-2.6%	17.8%	348	0.8%	-1.5%	9.6%	1756	6.8%	5.4%	16.3%	2481
DE	19.8%	9.8%	45.2%	400	-1.9%	-5.6%	14.9%	1832	3.1%	1.0%	17.7%	2628
<b>CHILDREN IN HH:</b>												
Any	11.0%	7.9%	22.0%	966	0.2%	1.2%	8.7%	3817	5.5%	2.1%	10.7%	5361
None	5.6%	9.8%	6.7%	1084	-3.3%	-5.1%	2.6%	6308	3.3%	1.4%	5.2%	9175
<b>ACCOMMODATION:</b>												
Commercial accom	8.5%	11.7%	15.3%	1358	1.7%	-0.3%	5.9%	6202	5.1%	1.7%	6.8%	8480
- Serviced accom	0.5%	1.8%	3.8%	672	4.1%	3.7%	8.4%	4082	8.6%	6.7%	9.9%	5875
- Hotel/motel/guesthouse	2.0%	6.8%	7.3%	580	3.5%	3.2%	7.0%	3610	8.4%	7.0%	9.1%	5240
- Bed & Breakfast	-5.9%	-18.2%	-16.3%	82	16.5%	15.3%	30.4%	455	17.6%	12.3%	23.5%	614
Total self-catering rented	17.2%	14.0%	28.3%	649	-2.1%	-3.2%	0.7%	1977	-1.3%</			