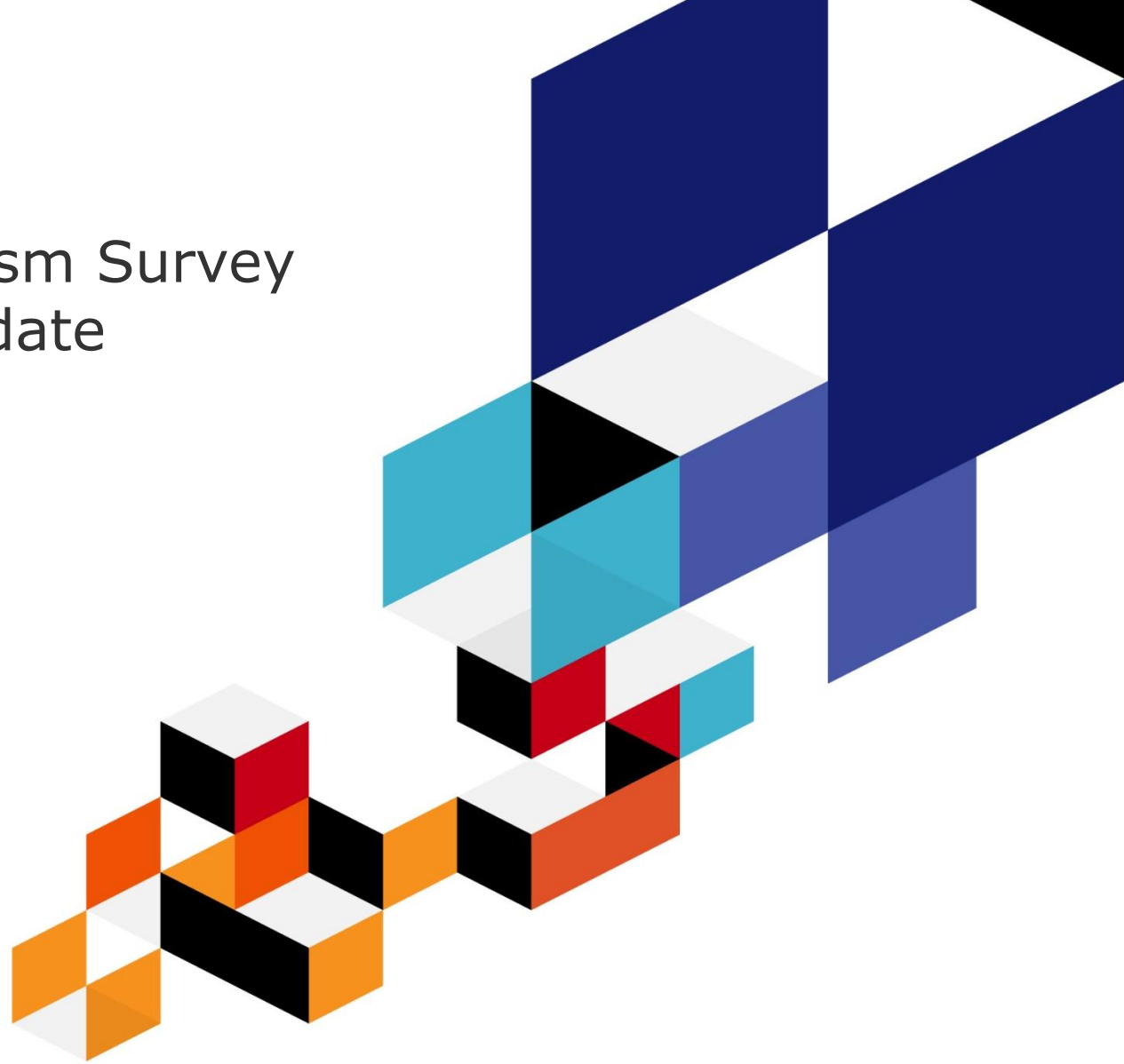


Great Britain Tourism Survey February 2012 Update



Summary – February 2012 Update

ALL TOURISM

- After a promising Jan 2012, GB tourism in Feb 2012 was a poor month (compared to Feb 2011). Trips decreased by -16%, bednights by -26% and spend by -8%. It is likely the wintry weather much of the UK experienced during the early part of the month impacted on tourism trips. It should also be highlighted that Feb 2011 was a good month for tourism with a greater number of trips taken when compared to 2010 and 2009.
- As a result, YTD – GB trips have decreased by -7% on 2011, with nights also decreasing by -15%. Expenditure reported no change (0%).
- In volume terms, GB trips during Jan-Feb 2012 (13.0m) fell by 1.0m trips on 2011 (14.0m). The number of trips during other years varied between 12.4m – 14.3m: 2010 (12.4m), 2009 (12.4m), 2008 (14.3m) and 2007 (13.1m).

HOLIDAYS

- It was a similar picture for holidays with trips, nights and spend during the month reporting decreases on Feb 2011 of -14%, -26% and -13% respectively indicating shorter trips.
- Consequently, YTD – GB trips decreased by -3%, with nights also decreasing by -9%. Spend increased however by +3%.
- In 2012, GB trips during Jan-Feb (4.3m) were at a similar level to 2011 (4.4m). Other years varied between 3.7m & 4.2m: 2010 (4.0m), 2009 (4.1m), 2008 (4.2m) and 2007 (3.7m).

VISITING FRIENDS & RELATIVES

- As with holidays, visiting friends and relatives has seen similar decreases compared to Feb 2011, reporting a -23% decrease in trips, -27% in nights and -15% in spend.
- The monthly decrease has resulted in YTD VFR trips declining by -16% on 2011. Nights have decreased by -17% and spend by -10%.
- VFR trips during 2012 (5.4m) have fallen significantly on 2011 (6.4m) falling back to 2009 levels (5.4m). Other years ranged between 5.6m – 6.5m: 2010 (5.6m), 2008 (6.5m) and 2007 (6.0m).

BUSINESS TOURISM

- Compared to holiday & VFR tourism, business tourism fared better albeit with a -3% decrease in trips recorded on Feb 2011. Nights decreased by -2% and spend by -1%.
- YTD – helped by a positive Jan, business trips have increased by +4% on 2011. Nights have increased by +9% and spend by +5%.
- Consequently, business trips in 2012 (2.8m) are at their highest level since 2008 (3.0m). The volumes for other years are: 2011 (2.7m), 2010 (2.3m), 2009 (2.5m) and 2007 (2.9m).

GB Domestic Tourism: Monthly Volume & Value 2012

ALL TOURISM

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb		
TRIPS	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																												14.035	13.005	-7.3%			
England	5.139	5.398	+5.0%	6.690	5.698	-14.8%																													11.830	11.096	-6.2%		
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb		
BEDNIGHTS	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																														34.873	29.547	-15.3%	
England	12.615	12.287	-2.6%	16.411	12.448	-24.1%																														29.025	24.736	-14.8%	
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb		
EXPENDITURE	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																														£2,138	£2,134	-0.2%	
England	£755	£877	+16.2%	£981	£918	-6.4%																														£1,736	£1,795	+3.4%	

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 *All expenditure figures are in HISTORIC PRICES.



Fieldwork: 8 Feb - 25 Mar 2012
 TNS Face-to-Face Omnibus Survey

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GB Domestic Tourism: Monthly Volume & Value 2012

HOLIDAYS

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb		
TRIPS	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																													4.410	4.284	-2.9%		
England	1.395	1.532	+9.8%	2.207	1.886	-14.5%																														3.602	3.418	-5.1%	
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb		
BEDNIGHTS	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																															11.219	10.174	-9.3%
England	3.130	3.723	+18.9%	5.609	4.381	-21.9%																															8.739	8.105	-7.3%
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb		
EXPENDITURE	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																															£878	£900	+2.5%
England	£265	£345	+30.2%	£416	£372	-10.6%																															£681	£717	+5.3%

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GB Domestic Tourism: Monthly Volume & Value 2012

VISITING FRIENDS & RELATIVES

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb				
TRIPS	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																																6.406	5.398	-15.7%	
England	2.489	2.370	-4.8%	3.139	2.397	-23.6%																																	5.628	4.767	-15.3%

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb						
BEDNIGHTS	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																																			14.876	12.372	-16.8%
England	5.368	5.178	-3.5%	7.441	5.323	-28.5%																																			12.808	10.501	-18.0%

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb							
EXPENDITURE	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																																				£570	£511	-10.4%
England	£213	£210	-1.4%	£279	£220	-21.1%																																				£492	£431	-12.4%

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GB Domestic Tourism: Monthly Volume & Value 2012

BUSINESS TOURISM

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb		
TRIPS	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																											2.676	2.780	+3.9%				
England	1.065	1.247	+17.1%	1.186	1.181	-0.4%																											2.251	2.428	+7.9%				
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb		
BEDNIGHTS	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																											5.486	5.973	+8.9%				
England	2.326	2.953	+27.0%	2.233	2.298	+2.9%																											4.560	5.251	+15.2%				
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Feb		
EXPENDITURE	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	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%																											£606	£633	+4.5%				
England	£233	£290	+24.5%	£260	£276	+6.2%																											£493	£565	+14.6%				

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GB Domestic Tourism: Year to Date – 2007-2012

Trips, Bednights & Expenditure, February

	ALL TOURISM, Jan – Feb period						HOLIDAYS – Jan – Feb period						VFR – Jan – Feb period						BUSINESS – Jan – Feb 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	13.117	14.288	12.363	12.366	14.035	13.005	3.705	4.239	4.051	4.012	4.410	4.284	6.006	6.504	5.411	5.624	6.406	5.398	2.883	2.978	2.535	2.276	2.676	2.780
England	11.096	12.073	10.555	10.388	11.830	11.096	2.978	3.436	3.289	3.097	3.602	3.418	5.240	5.596	4.763	4.964	5.628	4.767	2.458	2.600	2.183	1.914	2.251	2.428
	ALL TOURISM, Jan – Feb period						HOLIDAYS – Jan – Feb period						VFR – Jan – Feb period						BUSINESS – Jan – Feb 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	32.575	37.111	31.451	30.049	34.873	29.547	9.759	11.300	11.24	10.113	11.219	10.174	15.024	16.675	13.449	13.870	14.876	12.372	5.882	6.560	5.690	4.631	5.486	5.973
England	27.020	31.037	26.411	23.644	29.025	24.736	7.709	9.072	9.201	7.658	8.739	8.105	13.247	14.410	11.731	11.394	12.808	10.501	4.875	5.559	4.675	3.918	4.560	5.251
	ALL TOURISM, Jan – Feb period						HOLIDAYS – Jan – Feb period						VFR – Jan – Feb period						BUSINESS – Jan – Feb 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	£2,061	£2,222	£1,972	£1,793	£2,138	£2,134	£699	£851	£736	£765	£878	£900	£514	£565	£508	£483	£570	£511	£748	£743	£651	£451	£606	£633
England	£1,652	£1,859	£1,609	£1,431	£1,736	£1,795	£526	£698	£589	£586	£681	£717	£441	£464	£443	£401	£492	£431	£620	£643	£516	£383	£493	£565

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GB Domestic Tourism: Year to Date – 2007-2012

Trip Characteristics, Jan-Feb period

	ALL TOURISM, Jan – Feb period						HOLIDAYS – Jan – Feb period						VFR – Jan – Feb period						BUSINESS – Jan – Feb 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
Av. Trip Length																								
GB	2.48	2.60	2.54	2.43	2.48	2.27	2.63	2.67	2.77	2.52	2.54	2.37	2.50	2.56	2.49	2.47	2.32	2.29	2.04	2.20	2.24	2.03	2.05	2.15
England	2.44	2.57	2.50	2.28	2.45	2.23	2.59	2.64	2.80	2.47	2.43	2.37	2.53	2.58	2.46	2.30	2.28	2.20	1.98	2.14	2.14	2.05	2.03	2.16
Av. £ / Night																								
GB	£63	£60	£63	£60	£61	£72	£72	£75	£65	£76	£78	£88	£34	£34	£38	£35	£38	£41	£127	£113	£114	£97	£110	£106
England	£61	£60	£61	£61	£60	£73	£68	£77	£64	£77	£78	£88	£33	£32	£38	£35	£38	£41	£127	£116	£110	£98	£108	£108
Av. £ / Trip																								
GB	£157	£156	£160	£145	£152	£164	£189	£201	£182	£191	£199	£210	£86	£87	£94	£86	£89	£95	£259	£249	£257	£198	£226	£228
England	£149	£154	£152	£138	£147	£162	£177	£203	£179	£189	£189	£210	£84	£83	£93	£81	£87	£90	£252	£247	£236	£200	£219	£233

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