

## GB TOURISM SURVEY - July 2012

### SUMMARY OF RESULTS

#### 1. Headlines

- There were 12.3 million domestic overnight trips in Great Britain in July, a decrease of 14% from 14.2 million trips in 2011 (the highest volume recorded for July since the start of the current survey in 2006).
- Spend decreased by 8%, while the number of bednights decreased by 9%.
- A similar pattern was seen in England. The volume of trips declined 13% (from 11.6 million in 2011 to 10.1 million), with spend falling by 7% and the number of bednights by 5%.
- In the year to date (January to July), the number of trips (down 5%) and nights (down 7%) has decreased, while expenditure was marginally higher than in 2011 (1%).
- In the past 12 months, there were 4.2 million more trips taken in Great Britain compared with the same period the year before, an increase of 4%.

#### 2. Context

- The cool and wet weather from June continued into most of July, with temperatures and sunshine below average, and rainfall above average, with many areas of England receiving more than twice THE average July rainfall.

#### 3. Trip Characteristics

- Between January and July 2012, the number of holiday trips in Great Britain decreased by 7%, from 33.5 million to 31.1 million, with nights (down 11%) and spend (down 2%) also falling.
- The number of longer holiday trips (4+ nights) taken has declined more steeply (down 12%) than shorter, 1-3 night breaks (down 5%).
- The volume of trips and nights to visit friends and relatives (VFR) has also decreased so far this year (both down 8%), while spend on these trips fell 3%.
- However in the year so far business trips increased from 10.4 million in the same time last year to 11.1 million this year (up 7%). Expenditure on business trips has increased 12%, and business nights are up particularly, by 15% from 22.7 million to 26.2 million this year.
- Given the inclement weather, it is perhaps not surprising that of all destination types, the seaside has seen the greatest decline in trip numbers, falling by 9%. In contrast, trips to large towns and cities were almost the same as in 2011 (down 1%).
- Also impacted by the weather, camping and caravanning trips have decreased by 15%.

#### 4. Overseas Travel by UK Residents

- Trips abroad by UK residents were flat in July compared to the same time last year (0%), while year to date trips are down very slightly (1%). The amount spent has, however, remained above 2011 levels, up 6% in July and 4% for the year to date.

#### 5. Other Tourism Surveys

- VisitEngland's Tourism Business Monitor showed that for the summer period 2012, visitor numbers were down among 53% of accommodation providers and 51% of attractions.
- July results from the England Occupancy Survey showed a decrease of 5% in both room and bedspace occupancy in serviced accommodation compared to the same time in 2011.

## KEY MEASURES

### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
<b>July '12</b>									
GB	14.2	12.3	-14%	53.2	48.3	-9%	2,947	2,727	-8%
England	11.6	10.1	-13%	39.4	37.4	-5%	2,344	2,180	-7%
<b>Jan-July'12</b>									
GB	70.4	67.0	-5%	215.2	199.7	-7%	12,590	12,704	+1%
England	57.9	55.5	-4%	169.9	159.3	-6%	10,035	10,282	+3%

### Purpose of Trip – July 2012

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
<b>GB</b>									
Holiday	8.0	6.5	-18%	35.4	29.9	-16%	1,983	1,782	-10%
Business	1.7	1.7	+2%	3.8	4.7	+24%	399	418	+5%
VFR	4.2	3.6	-15%	12.5	11.5	-8%	514	444	-14%
<b>England</b>									
Holiday	6.3	5.1	-19%	25.4	22.4	-12%	1,589	1,392	-12%
Business	1.4	1.4	+1%	2.8	3.7	+32%	292	367	+26%
VFR	3.6	3.1	-13%	10.1	9.3	-8%	424	348	-18%

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

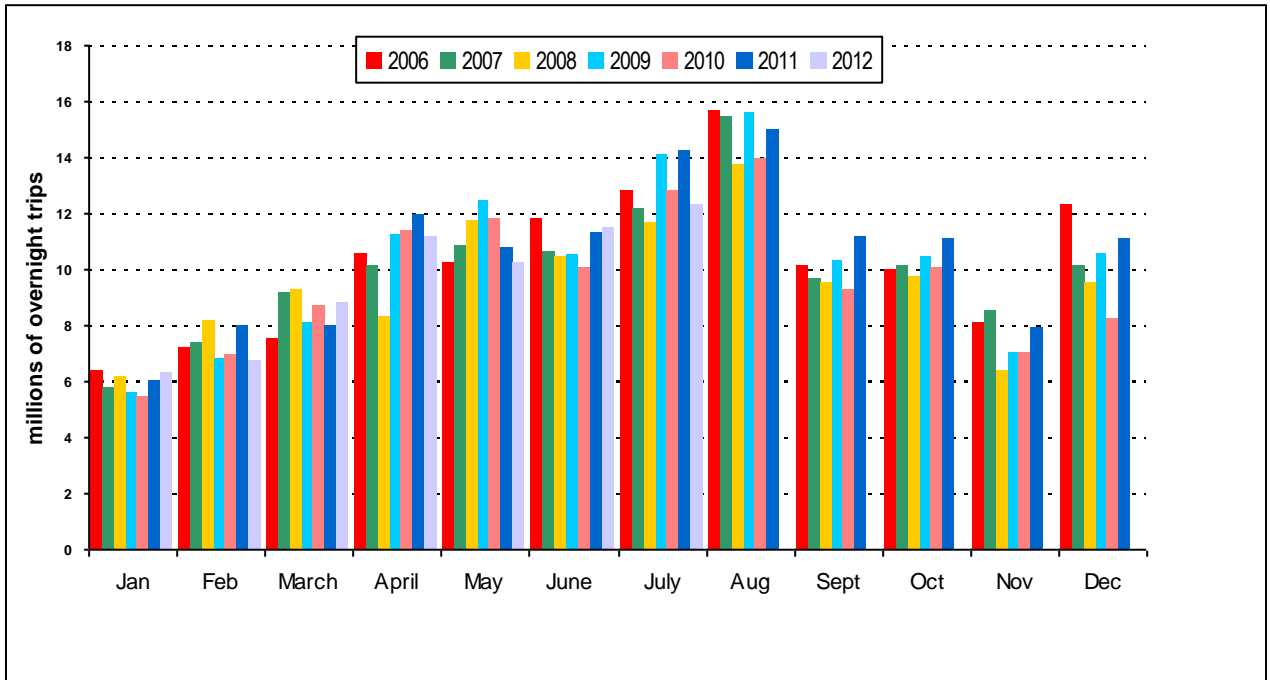
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
<b>GB</b>									
Holiday	33.5	31.1	-7%	119.4	106.8	-11%	7,391	7,214	-2%
Business	10.4	11.1	+7%	22.7	26.2	+15%	2,453	2,741	+12%
VFR	24.2	22.3	-8%	65.2	59.8	-8%	2,453	2,388	-3%
<b>England</b>									
Holiday	26.3	24.5	-7%	89.7	81.5	-9%	5,716	5,705	0%
Business	8.8	9.3	+6%	18.5	21.8	+17%	2,018	2,295	+14%
VFR	20.9	19.4	-7%	55.0	50.2	-9%	2,060	1,979	-4%

### Outbound Travel – UK Residents

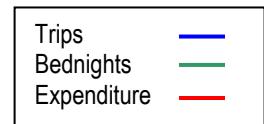
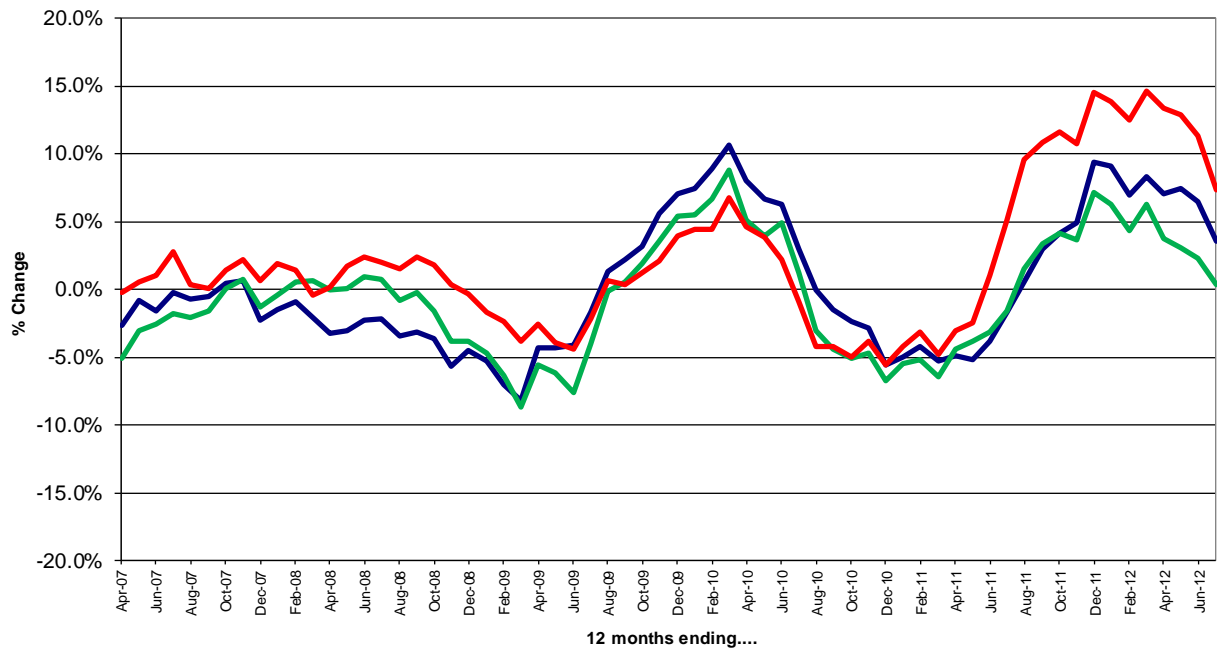
	TRIPS (MILLIONS)			SPEND (£BN)		
	2011	2012	% +/-	2011	2012	% +/-
July	5.7	5.8	0%	3.3	3.6	+6%
January-July	31.7	31.5	-1%	17.4	18.1	+4%
Aug '11 – July '12	56.6	56.7	0%	31.6	32.4	+2%

## 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 (July 2011 vs. July 2012)
- Year to date (January–July 2011 vs. January– July 2012)
- 12 month rolling (Aug 2010 – July 2011 vs. Aug 2011– July 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/nights/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: July 2012			YTD: January - July 2012			12 month rolling August 2011 - July 2012			Unweighted Trips		
	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure
<b>TOTAL</b>	-13.7%	-9.1%	-7.5%	1881	-4.9%	-7.2%	0.9%	9740	3.5%	0.4%	7.4%	17327
<b>PURPOSE:</b>												
Pure Holiday	-18.2%	-15.7%	-10.1%	1044	-7.1%	-10.6%	-2.4%	4687	-0.2%	-3.1%	3.3%	8224
- 1-3 nights holiday	-25.2%	-28.6%	-20.4%	510	-4.6%	-6.3%	3.1%	2954	2.2%	0.4%	6.3%	5063
- 4+ nights holiday	-9.5%	-11.4%	-3.6%	533	-11.5%	-12.9%	-8.0%	1733	-4.2%	-4.9%	0.2%	3161
VFR (on holiday)	-15.1%	-15.8%	-11.3%	325	-4.2%	-6.6%	-2.5%	1835	9.4%	4.8%	7.2%	3450
HOLIDAY (TOTAL)	-17.5%	-15.7%	-10.3%	1368	-6.3%	-9.6%	-2.4%	6522	2.4%	-1.1%	3.9%	11673
VFR (non-holiday)	-15.1%	5.5%	-16.5%	249	-11.7%	-10.5%	-2.9%	1588	-1.5%	-3.4%	5.9%	2968
VFR (TOTAL)	-15.1%	-8.4%	-13.6%	573	-7.9%	-8.3%	-2.6%	3423	4.0%	1.3%	6.7%	6418
Business	2.0%	23.8%	4.8%	198	7.1%	15.2%	11.7%	1318	12.9%	19.3%	17.9%	2186
<b>Regions:</b>												
West Midlands	-10.2%	-1.0%	6.0%	121	0.9%	1.7%	4.1%	626	6.6%	-1.3%	6.8%	1141
East of England	-4.1%	27.9%	26.7%	155	-12.2%	-5.6%	10.1%	736	5.6%	12.5%	19.3%	1368
East Midlands	-19.2%	-25.6%	-39.0%	117	-13.2%	-16.6%	-6.2%	659	-2.5%	-6.9%	1.8%	1171
London	-3.2%	1.7%	-4.3%	139	2.9%	-3.4%	3.5%	881	1.5%	5.4%	0.1%	1518
North West	-5.6%	11.6%	6.9%	220	5.8%	9.6%	14.5%	1112	14.2%	15.2%	22.6%	2007
North East	-15.3%	-19.8%	9.7%	66	-0.4%	-11.8%	18.5%	342	7.8%	-3.9%	23.6%	609
South East	-20.4%	-14.8%	-23.9%	250	0.8%	-1.8%	6.7%	1355	7.2%	3.7%	12.8%	2355
South West	-13.5%	-11.2%	-11.1%	356	-10.5%	-14.2%	-11.2%	1588	-5.9%	-10.4%	-7.3%	2782
Yorkshire & the Humber	-9.2%	5.7%	-2.7%	157	-0.7%	-4.0%	6.4%	885	12.3%	6.9%	11.5%	1615
<b>LOCATION TYPE:</b>												
Seaside	-19.9%	-17.6%	-17.2%	474	-9.2%	-13.0%	-9.1%	2038	-0.3%	-3.7%	-2.7%	3635
Large city/ large town	-12.4%	-5.9%	-3.6%	635	-0.6%	-0.5%	4.8%	3789	5.6%	4.9%	11.0%	6714
Small town	-8.9%	-12.9%	-8.9%	442	-4.9%	-8.1%	1.4%	2313	4.4%	-1.0%	7.6%	4110
Countryside/ village	-4.2%	4.7%	2.8%	404	-5.5%	-8.2%	4.3%	1860	4.1%	0.2%	11.6%	3296
<b>AGE:</b>												
16-24	-26.2%	2.8%	-25.6%	203	-9.8%	-7.8%	-4.7%	1160	-3.2%	-4.3%	-1.2%	2040
25-34	-11.2%	-5.5%	-6.3%	333	1.5%	1.2%	13.5%	1665	8.0%	10.1%	13.8%	2938
35-44	-23.4%	-18.3%	-14.1%	415	-15.8%	-16.3%	-12.5%	2035	-1.8%	-6.5%	1.7%	3707
45-54	-4.4%	-12.8%	-2.6%	344	4.1%	-0.3%	8.9%	1824	6.4%	3.7%	9.9%	3097
55+	-6.5%	-5.6%	0.8%	587	-3.3%	-8.1%	1.8%	3057	6.6%	1.1%	9.9%	5547
<b>SEG:</b>												
AB	-9.6%	2.1%	5.0%	617	-3.9%	-6.1%	1.1%	3275	3.4%	-0.4%	6.7%	5687
C1	-17.2%	-4.5%	-16.2%	555	-5.5%	-5.5%	-2.1%	2994	5.9%	3.9%	6.4%	5480
C2	-12.3%	-18.6%	-10.8%	343	-2.3%	-6.6%	3.9%	1719	2.8%	0.0%	9.6%	3027
DE	-18.0%	-28.9%	-18.1%	366	-9.7%	-14.0%	4.7%	1752	-0.8%	-4.4%	9.5%	3133
<b>CHILDREN IN HH:</b>												
Any	-3.9%	-4.5%	11.5%	756	-5.9%	-6.3%	2.0%	3410	3.5%	0.0%	9.7%	6289
None	-18.2%	-11.6%	-14.5%	1125	-4.4%	-7.6%	0.5%	6331	3.5%	0.6%	6.5%	11038
<b>ACCOMMODATION:</b>												
Commercial accom	-13.1%	-9.9%	-7.9%	1216	-0.1%	-4.2%	2.3%	6004	5.8%	2.2%	7.4%	10302
- Serviced accom	-13.8%	-12.5%	-7.0%	693	5.1%	5.6%	8.5%	4116	10.6%	9.5%	12.2%	7068
- Hotel/motel/guesthouse	-15.6%	-13.9%	-9.6%	600	4.6%	4.1%	6.8%	3657	10.5%	9.6%	11.5%	6289
- Bed & Breakfast	5.4%	-8.9%	15.7%	90	18.2%	23.5%	36.8%	445	17.0%	15.5%	26.2%	744
Total self-catering rented	-13.7%	-11.7%	-12.2%	502	-10.1%	-12.3%	-11.5%	1735	-3.7%	-3.9%	-2.9%	2984
- Camping & Caravanning (inc. owned caravans)	-18.0%	-11.7%	-17.4%	367	-15.2%	-13.1%	-10.4%	1274	-8.8%	-6.3%	-3.0%	2165
- Other self-catering rented	-2.5%	-13.5%	-9.1%	198	-3.4%	-13.5%	-13.7%	723	3.2%	-2.9%	-3.3%	1259
Hostels	185.1%	57.0%	88.9%	32	3.3%	0.8%	17.8%	115	-4.5%	2.9%	1.4%	180
Own home/friends'/relatives'	-15.8%	-8.6%	-20.0%	641	-12.3%	-12.6%	-9.3%	3593	0.7%	-2.6%	4.9%	6792

	England											
	Month: July 2012			YTD: January - July 2012			12 month rolling August 2011 - July 2012			Unweighted Trips		
	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure
<b>TOTAL</b>	-13.0%	-5.1%	-7.0%	1540	-4.3%	-6.3%	2.5%	8069	3.6%	0.9%	7.0%	14320
<b>PURPOSE:</b>												
Pure Holiday	-18.6%	-11.6%	-12.4%	817	-6.5%	-9.2%	-0.2%	3698	-0.7%	-3.2%	2.9%	6519
- 1-3 nights holiday	-25.6%	-28.6%	-24.7%	418	-5.2%	-7.7%	4.8%	2357	1.3%	-0.9%	6.7%	4090
- 4+ nights holiday	-8.9%	-4.9%	-3.7%	397	-9.1%	-10.0%	-5.6%	1337	-4.4%	-4.5%	-1.1%	2419
VFR (on holiday)	-15.2%	-16.5%	-18.3%	284	-5.0%	-8.9%	-5.4%	1573	10.0%	7.3%	5.2%	2942
HOLIDAY (TOTAL)	-17.7%	-12.6%	-13.3%	1101	-6.1%	-9.1%	-1.1%	5268	2.4%	-0.5%	3.3%	9459
VFR (non-holiday)	-10.7%	8.6%	-17.2%	217	-9.2%	-8.3%	-1.9%	1416	-1.6%	-3.1%	5.6%	2608
VFR (TOTAL)	-13.3%	-7.8%	-17.9%	500	-7.1%	-8.6%	-3.9%	2989	4.2%	2.6%	5.3%	5551
Business	0.6%	32.1%	25.7%	162	6.0%	17.4%	13.7%	1108	12.3%	18.5%	17.3%	1814
<b>Regions:</b>												
West Midlands	-10.2%	-1.0%	6.0%	121	0.9%	1.7%	4.1%	626	6.6%	-1.3%	6.8%	1141
East of England	-4.1%	27.9%	26.7%	155	-12.2%	-5.6%	10.1%	736	5.6%	12.5%	19.3%	1368
East Midlands	-19.2%	-25.6%	-39.0%	117	-13.2%	-16.6%	-6.2%	659	-2.5%	-6.9%	1.8%	1171
London	-3.2%	1.7%	-4.3%	139	2.9%	-3.4%	3.5%	881	1.5%	5.4%	0.1%	1518
North West	-5.6%	11.6%	6.9%	220	5.8%	9.6%	14.5%	1112	14.2%	15.2%	22.6%	2007
North East	-15.3%	-19.8%	9.7%	66	-0.4%	-11.8%	18.5%	342	7.8%	-3.9%	23.6%	609
South East	-20.4%	-14.8%	-23.9%	250	0.8%	-1.8%	6.7%	1355	7.2%	3.7%	12.8%	2355
South West	-13.5%	-11.2%	-11.1%	356	-10.5%	-14.2%	-11.2%	1588	-5.9%	-10.4%	-7.3%	2782
Yorkshire & the Humber	-9.2%	5.7%	-2.7%	157	-0.7%	-4.0%	6.4%	885	12.3%	6.9%	11.5%	1615
<b>LOCATION TYPE:</b>												
Seaside	-13.2%	-3.4%	-12.5%	386	-8.9%	-9.3%	-7.5%	1628	0.1%	-0.9%	-2.3%	2927
Large city/ large town	-10.8%	-7.2%	-5.0%	554	0.1%	0.3%	6.5%	3286	5.5%	4.6%	11.7%	5785
Small town	-12.9%	-14.5%	-9.6%	339	-5.6%	-11.0%	-1.2%	1839	3.2%	-1.9%	3.8%	3262
Countryside/ village	-11.0%	4.9%	0.6%	307	-4.9%	-7.1%	10.4%	1500	4.3%	-0.5%	11.3%	2654
<b>AGE:</b>												
16-24	-25.6%	-7.0%	-30.3%	177	-11.2%	-9.7%	-5.8%	978	-5.8%	-4.7%	-4.8%	1708
25-34	-9.5%	0.9%	-1.5%	278	7.3%	8.6%	18.3%	1412	12.4%	16.1%	18.2%	2486
35-44	-17.5%	-6.8%	-7.1%	353	-13.7%	-13.2%	-6.6%	1720	-2.0%	-4.9%	3.1%	3076
45-54	-7.2%	-6.6%	1.8%	268	2.3%	1.9%	8.4%	1483	5.0%	3.1%	7.6%	2518
55+	-8.7%	-5.2%	-6.8%	466	-3.9%	-10.8%	0.7%	2475	6.2%	-0.5%	8.5%	4534
<b>SEG:</b>												
AB	-8.3%	2.0%	8.4%	506	-4.4%	-6.7%	3.0%	2728	2.5%	-2.0%	6.5%	4720
C1	-23.2%	-12.5%	-24.1%	438	-4.9%	-7.0%	-2.6%	2493	5.9%	2.9%	4.3%	4557
C2	-1.9%	4.0%	-4.6%	293	-0.7%	-1.2%	7.7%	1408	4.4%	5.4%	12.4%	2482
DE	-14.3%	-14.7%	-12.1%	305	-6.7%	-9.8%	8.1%	1431	0.0%	-1.9%	9.4%	2542
<b>CHILDREN IN HH:</b>												
Any	2.2%	8.8%	15.2%	625	-3.0%	-1.7%	4.3%	2852	5.0%	2.1%	10.1%	5228
None	-19.7%	-11.9%	-15.2%	917	-4.8%	-8.2%	1.8%	5223	2.9%	0.3%	5.8%	9097
<b>ACCOMMODATION:</b>												
Commercial accom	-15.0%	-10.3%	-8.8%	955	0.1%	-4.0%	3.6%	4851	5.2%	1.3%	6.8%	8343
- Serviced accom	-14.9%	-18.2%	-6.7%	571	4.8%	4.2%	9.2%	3400	9.6%	6.7%	11.1%	5844
- Hotel/motel/guesthouse	-15.9%	-17.2%	-7.4%	501	3.8%	2.5%	6.9%	3019	9.1%	6.6%	10.0%	5205
- Bed & Breakfast	-3.7%	-29.0%	-4.0%	67	22.5%	25.7%	44.6%	372	20.4%	15.1%	29.8%	615
Total self-catering rented	-13.3%	-7.5%	-14.6%	382	-8.9%	-10.4%	-9.4%	1345	-3.8%	-3.1%	-2.9%	2305