

# Great Britain Tourism Survey

July 2012 Update



# Summary – July 2012 Update

## ALL TOURISM

- Compared to July last year, GB overnight domestic tourism in **July 2012 showed decreases in trips, nights and spend** (-14%, -9% and -8% respectively). It is possible that a combination of the continuing poor summer weather during most of July and the Olympics events impacted on overnight tourism. Domestic holidaymakers may also have delayed their main summer holiday until after the Olympics had finished. There may also have been an impact from people taking their holidays earlier - in June - due to the extra holiday most received as part of the Queen's Jubilee celebrations.
- **YTD GB trips and nights continue to demonstrate a negative trend.** Trips and bednights reported decreases of -5% and -7%. Before taking account of inflation, **YTD spend has increased slightly** by +1%.
- In volume terms, the 67 million GB trips taken during the January to July 2012 period represented a fall of 3.4m on 2011 (70.4m). The number of trips during the previous two years were also slightly higher: 2010 (67.2m), 2009 (68.7m), however 2012 performance was above that experienced in 2008 (65.7m) and 2007 (66m).

## HOLIDAYS

- **Following the increases in GB holidays in June, holiday tourism did not perform as well in July 2012** with trips, nights and spend reporting decreases of -18%, -16% and -10% respectively compared to July 2011. The additional holiday in June for the Queen's Diamond Jubilee will undoubtedly have moved trips which might otherwise have been taken in May or July into June. The effects of the Olympics are less certain at this stage – perhaps for some, domestic holidays were postponed until later in August or taken earlier in the summer.
- **YTD holiday trips, nights and expenditure continue to report decreases:** -7%, -11% and -2% respectively.
- In 2012, GB holiday trips during Jan-July (31.1m) were lower than in 2011 (33.5m). 2012 is currently also underperforming compared to 2010 (32.1m) and 2009 (33.7m), but is performing better than 2008 (28.3m) and 2007 (28.8m).

## VISITING FRIENDS & RELATIVES

- **Visits to friends and relatives also experienced decreases in July 2012** with trips, nights and spend falling by -15%, -8% and -14% respectively.
- **YTD VFR also reported a decrease on the same period in 2011:** -8%, -8% and -3% in trips, nights and spend respectively.
- VFR trips during the first seven months of 2012 (22.3m) have decreased on 2011 (24.2m). Indeed, with all other years reported higher trip volumes, 2012 represents the poorest performing year to date in VFR tourism: 2010 (23.6m), 2009 (23.2m), 2008 (24m) and 2007 (24.6m).

## BUSINESS TOURISM

- **More positively, in contrast to other trip types, business tourism performed relatively well in July 2012,** with trips, nights and expenditure increasing by +2%, +24% and +5% respectively. As trips and spending didn't increase to the same extent as bednights, business travellers would appear to have taken slightly longer but lower budget business trips.
- **YTD business tourism also reported increases** of +7%, +15% and +12% in trips, nights and spend.
- Business trips in 2012 are at the same level as in 2008 (11.1m). The volumes for other years are lower: 2011 (10.4m), 2010 (9.6m), 2009 (10.2m) and 2007 (10.9m).

# GB 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>																		
<b>GB</b>	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%
<b>England</b>	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%
<b>BEDNIGHTS</b>																		
<b>GB</b>	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%
<b>England</b>	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%
<b>EXPENDITURE</b>																		
<b>GB</b>	£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%
<b>England</b>	£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%

	July			August			September			October			November			December			YTD - Jan-July		
	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>	14.239	12.291	-13.7%																70.4	66.952	-4.9%
<b>England</b>	11.572	10.064	-13.0%																57.941	55.468	-4.3%
<b>BEDNIGHTS</b>																					
<b>GB</b>	53.199	48.343	-9.1%																215.246	199.719	-7.2%
<b>England</b>	39.442	37.425	-5.1%																169.947	159.305	-6.3%
<b>EXPENDITURE</b>																					
<b>GB</b>	£2,947	£2,727	-7.5%																£12,590	£12,704	+0.9%
<b>England</b>	£2,344	£2,180	-7.0%																£10,035	£10,282	+2.5%

\*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 July – 26 August  
 TNS Face-to-Face Omnibus Survey  
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# GB 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>																		
<b>GB</b>	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%
<b>England</b>	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%
<b>BEDNIGHTS</b>																		
<b>GB</b>	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%
<b>England</b>	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%
<b>EXPENDITURE</b>																		
<b>GB</b>	£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%
<b>England</b>	£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%

	July			August			September			October			November			December			YTD – Jan-July		
	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>	8.006	6.548	-18.2%																33.492	31.117	-7.1%
<b>England</b>	6.293	5.124	-18.6%																26.269	24.549	-6.5%
<b>BEDNIGHTS</b>																					
<b>GB</b>	35.424	29.872	-15.7%																119.411	106.755	-10.6%
<b>England</b>	25.416	22.477	-11.6%																89.695	81.482	-9.2%
<b>EXPENDITURE</b>																					
<b>GB</b>	£1,983	£1,782	-10.1%																£7,391	£7,214	-2.4%
<b>England</b>	£1,589	£1,392	-12.4%																£5,716	£5,705	-0.2%

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# GB 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%	3.369	3.096	-8.1%	3.382	3.551	+5.0%
<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%	2.937	2.655	-9.6%	2.918	3.11	+6.6%
<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	9.78	-17.1%	8.847	7.991	-9.7%	9.395	8.672	-7.7%
<b>England</b>	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%
<b>EXPENDITURE</b>																		
<b>GB</b>	£254	£243	-4.3%	£316	£268	-15.2%	£299	£336	+12.4%	376	382	+1.6%	£354	£335	-5.4%	£339	£380	+12.1%
<b>England</b>	£213	£210	-1.4%	£279	£220	-21.1%	£252	£300	+19.0%	315	301	-4.4%	£297	£279	-6.1%	£280	£320	+14.3%

	July			August			September			October			November			December			YTD - Jan-July		
	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>	4.183	3.552	-15.1%																24.165	22.268	-7.9%
<b>England</b>	3.577	3.1	-13.3%																20.922	19.444	-7.1%
<b>BEDNIGHTS</b>																					
<b>GB</b>	12.543	11.492	-8.4%																65.226	59.835	-8.3%
<b>England</b>	10.096	9.309	-7.8%																54.968	50.228	-8.6%
<b>EXPENDITURE</b>																					
<b>GB</b>	£514	£444	-13.6%																£2,453	£2,388	-2.6%
<b>England</b>	£424	£348	-17.9%																£2,060	£1,979	-3.9%

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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-July		
	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%																10.363	11.103	+7.1%
England	1.391	1.399	+0.6%																8.809	9.335	+6.0%

  

BEDNIGHTS	July			August			September			October			November			December			YTD – Jan-July		
	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%																22.747	26.207	+15.2%
England	2.788	3.683	+32.1%																18.522	21.754	+17.4%

  

EXPENDITURE	July			August			September			October			November			December			YTD – Jan-July		
	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%																£2,453	£2,741	+11.7%
England	£292	£367	+25.7%																£2,018	£2,295	+13.7%

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

## Trips, Bednights & Expenditure, Jan-July period

	ALL TOURISM, Jan – July period						HOLIDAYS – Jan – July period						VFR – Jan – July period						BUSINESS – Jan – July 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
<b>TRIPS</b>																								
GB	66.014	65.659	68.723	67.138	70.4	66.952	28.752	28.321	33.713	32.057	33.492	31.117	24.58	23.972	23.164	23.587	24.165	22.268	10.861	11.053	10.169	9.598	10.363	11.103
England	54.733	54.416	57.405	55.154	57.941	55.468	22.686	22.446	26.958	25.048	26.269	24.549	21.283	20.525	20.292	20.511	20.922	19.444	9.239	9.501	8.739	7.99	8.809	9.335
	ALL TOURISM, Jan – July period						HOLIDAYS – Jan – July period						VFR – Jan – July period						BUSINESS – Jan – July period					
<b>BEDNIGHTS</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
GB	206.605	212.281	216.812	206.072	215.246	199.719	108.403	106.062	123.892	114.488	119.411	106.755	67.468	69.637	63.412	63.547	65.226	59.835	24.523	25.689	24.92	22.52	22.747	26.207
England	163.435	170.342	174.759	161.01	169.947	159.305	81.12	79.98	96.361	86.729	89.695	81.482	57.073	59.184	53.887	53.071	54.968	50.228	20.499	21.761	20.761	17.271	18.522	21.754
	ALL TOURISM, Jan – July period						HOLIDAYS – Jan – July period						VFR – Jan – July period						BUSINESS – Jan – July period					
<b>EXPENDITURE</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
GB	£11,148	£11,749	£11,955	£11,170	£12,590	£12,704	£5,997	£6,188	£6,779	£6,507	£7,391	£7,214	£2,300	£2,550	£2,413	£2,276	£2,453	£2,388	£2,561	£2,702	£2,544	£2,121	£2,453	£2,741
	£8,846	£9,429	£9,739	£8,906	£10,035	£10,282	£4,577	£4,839	£5,399	£5,052	£5,716	£5,705	£1,943	£2,078	£2,045	£1,910	£2,060	£1,979	£2,101	£2,258	£2,111	£1,725	£2,018	£2,295

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

## Trip Characteristics, Jan-July period

	ALL TOURISM, Jan – July period						HOLIDAYS – Jan – July period						VFR – Jan – July period						BUSINESS – Jan – July period					
<b>Av. Trip Length</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
GB	3.13	3.23	3.15	3.07	3.06	2.98	3.77	3.74	3.67	3.57	3.57	3.43	2.74	2.90	2.74	2.69	2.70	2.69	2.26	2.32	2.45	2.35	2.20	2.36
England	2.99	3.13	3.04	2.92	2.93	2.87	3.58	3.56	3.57	3.46	3.41	3.32	2.68	2.88	2.66	2.59	2.63	2.58	2.22	2.29	2.38	2.16	2.10	2.33
<b>Av. £/Night</b>	ALL TOURISM, Jan – July period						HOLIDAYS – Jan – July period						VFR – Jan – July period						BUSINESS – Jan – July 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	£54	£55	£55	£54	£58	£64	£55	£58	£55	£57	£62	£68	£34	£37	£38	£36	£38	£40	£104	£105	£102	£94	£108	£105
England	£54	£55	£56	£55	£59	£65	£56	£61	£56	£58	£64	£70	£34	£35	£38	£36	£37	£39	£102	£104	£102	£100	£109	£105
<b>Av. £/Trip</b>	ALL TOURISM, Jan – July period						HOLIDAYS – Jan – July period						VFR – Jan – July period						BUSINESS – Jan – July 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	£169	£179	£174	£166	£179	£190	£209	£218	£201	£203	£221	£232	£94	£106	£104	£96	£102	£107	£236	£244	£250	£221	£237	£247
England	£162	£173	£170	£161	£173	£185	£202	£216	£200	£202	£218	£232	£91	£101	£101	£93	£98	£102	£227	£238	£242	£216	£229	£246

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