

Great Britain Tourism Survey

June 2012 Update



Summary – June 2012 Update

ALL TOURISM

- Compared to overnight domestic tourism in June last year, **June 2012 showed increases in trips and spend** (+2%, +6% respectively) **and a slight decrease in nights** (-1%). We believe that the increases could be the result of the Jubilee Celebrations in June.
- **YTD GB trips and nights still followed a negative trend.** Trips and bednights reported decreases of -3% and -7% YTD, **whereas YTD spend has increased** by +4%.
- In volume terms, GB trips during Jan-June 2012 (54.7m) fell by 1.5m on 2011 (56.2m). However, the number of trips during other years were lower: 2010 (54.3m), 2009 (54.6m), 2008 (54.0m) and 2007 (53.9m).

HOLIDAYS

- **Holiday tourism performed well in June 2012** with trips, nights and spend reporting increases of +3%, +1% and +9% respectively compared to June 2011. Even though it was the wettest June in the UK since records began, it is likely that the extra bank holiday at the start of the month for the Jubilee Celebrations will have contributed to the increase on 2011.
- **YTD holiday expenditure in GB reported a slight increase** of +0.4% (before taking account of inflation); **YTD holiday trips and bednights reported decreases** of -4% and -9% respectively.
- In 2012, GB holiday trips during Jan-June (24.6m) were lower than in 2011 (25.5m). 2012 is currently performing on the same level as 2010 (24.6m), is underperforming compared to 2009 (25.3m), but is performing better than 2008 (22.1m) and 2007 (22.2m).

VISITING FRIENDS & RELATIVES

- **Visiting friends and relatives had a mixed performance in June 2012** with increases in trips and spend of +5% and +12%, respectively, and with a decrease in bednights (-8%). This suggests that VFR trips were shorter but of a relatively higher value.
- **YTD VFR reported a decrease on the same period in 2011 across trips and bednights:** -6% and -8%, respectively; **and a slight increase in expenditure** (before inflation): +0.3%.
- VFR trips during the first six months of 2012 (18.7m) have decreased on 2011 (20.0m). All other years reported higher trip volumes than 2012: 2010 (19.6m), 2009 (19.4m), 2008 (20.5m) and 2007 (20.9m).

BUSINESS TOURISM

- **Business tourism also had a mixed performance in June 2012** with trips and bednights increasing by +2% and +16% respectively and expenditure decreasing by -5%. The decrease in spending, compared to the increase in trips or bednights, is suggesting lower value trips.
- **However, YTD business tourism still reported increases** of +8%, +14% and +13% in trips, nights and spend.
- Business trips in 2012 are at the same level as in 2007 (9.4m). The volumes for other years are: 2011 (8.7m), 2010 (8.5m), 2009 (8.7m) and 2008 (9.4m).

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
TRIPS																		
GB	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%
England	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%
BEDNIGHTS																		
GB	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%
England	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%
EXPENDITURE																		
GB	£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%
England	£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-June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
TRIPS																					
GB																			56.162	54.661	-2.7%
England																			46.369	45.404	-2.1%
BEDNIGHTS																					
GB																			162.048	151.376	-6.6%
England																			130.504	121.879	-6.6%
EXPENDITURE																					
GB																			£9,644	£9,977	+3.5%
England																			£7,691	£8,102	+5.3%

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Fieldwork: 13 Jun – 29 July 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		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
TRIPS																		
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%	5.705	4.944	-13.3%	5.838	6.002	+2.8%
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%	4.378	3.811	-13.0%	4.493	4.737	+5.4%
BEDNIGHTS																		
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%	20.395	15.964	-21.7%	22.047	22.223	+0.8%
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%	15.467	12.066	-22.0%	16.704	16.83	+0.8%
EXPENDITURE																		
GB	£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%
England	£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-June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
TRIPS																					
GB																			25.486	24.569	-3.6%
England																			19.976	19.425	-2.8%
BEDNIGHTS																					
GB																			83.987	76.883	-8.5%
England																			64.279	59.006	-8.2%
EXPENDITURE																					
GB																			£5,408	£5,432	+0.4%
England																			£4,127	£4,314	+4.5%

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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
TRIPS																		
GB	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%
England	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%
BEDNIGHTS																		
GB	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%
England	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%
EXPENDITURE																		
GB	£254	£243	-4.3%	£316	£268	-15.2%	£299	£336	+12.4%	376	382	+1.6%	£354	£335	-5.4%	£339	£380	+12.1%
England	£213	£210	-1.4%	£279	£220	-21.1%	£252	£300	+19.0%	315	301	-4.4%	£297	£279	-6.1%	£280	£320	+14.3%
Scotland	£33	£26	-21.2%	£26	£40	+53.8%	£35	£23	-34.3%	46	52	+13.0%	£45	£39	-13.3%	£43	£30	-30.2%
Wales	£8	£7	-12.5%	£12	£7	-41.7%	£12	£12	0.0%	15	29	+93.3%	£13	£17	+30.8%	£16	£30	+87.5%

	July			August			September			October			November			December			YTD – Jan-June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
TRIPS																					
GB																			19.982	18.716	-6.3%
England																			17.345	16.344	-5.8%
BEDNIGHTS																					
GB																			52.683	48.343	-8.2%
England																			44.871	40.919	-8.8%
EXPENDITURE																					
GB																			£1,939	£1,944	+0.3%
England																			£1,637	£1,631	-0.4%

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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-June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB																			8.691	9.397	+8.1%
England																			7.417	7.936	+7.0%

BEDNIGHTS	July			August			September			October			November			December			YTD – Jan-June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB																			18.967	21.527	+13.5%
England																			15.734	18.071	+14.9%

EXPENDITURE	July			August			September			October			November			December			YTD – Jan-June		
	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch	2011	2012	%ch
GB																			£2,054	£2,323	+13.1%
England																			£1,725	£1,928	+11.8%

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GB Domestic Tourism: Year to Date – 2007-2012

Trips, Bednights & Expenditure, Jan-June period

	ALL TOURISM, Jan – June period						HOLIDAYS – Jan – June period						VFR – Jan – June period						BUSINESS – Jan – June 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	53.903	54.039	54.638	54.336	56.162	54.661	22.165	22.067	25.291	24.552	25.486	24.569	20.848	20.532	19.353	19.605	19.982	18.716	9.440	9.364	8.645	8.476	8.691	9.397
England	44.694	45.093	45.863	44.825	46.369	45.404	17.547	17.666	20.264	19.333	19.976	19.425	18.037	17.679	16.994	17.043	17.345	16.344	7.950	8.019	7.436	7.026	7.417	7.936
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	157.187	167.415	162.292	155.11	162.048	151.376	76.408	76.444	86.383	79.728	83.987	76.883	55.565	59.719	51.109	51.357	52.683	48.343	20.449	22.203	21.177	18.937	18.967	21.527
England	124.621	135.975	132.629	122.399	130.504	121.879	56.886	58.410	67.834	61.624	64.279	59.006	47.594	51.108	43.981	42.957	44.871	40.919	16.816	18.763	17.777	14.297	15.734	18.071
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	£8,762	£9,469	£9,311	£8,788	£9,644	£9,977	£4,388	£4,742	£4,963	£4,800	£5,408	£5,432	£1,899	£2,149	£1,957	£1,859	£1,939	£1,944	£2,237	£2,303	£2,210	£1,887	£2,054	£2,323
England	£6,960	£7,641	£7,636	£7,045	£7,691	£8,102	£3,349	£3,734	£3,967	£3,762	£4,127	£4,314	£1,619	£1,764	£1,687	£1,557	£1,637	£1,631	£1,820	£1,915	£1,832	£1,530	£1,725	£1,928

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GB Domestic Tourism: Year to Date – 2007-2012

Trip Characteristics, Jan-June period

Av. Trip Length	ALL TOURISM, Jan – June period						HOLIDAYS – Jan – June period						VFR – Jan – June period						BUSINESS – Jan – June 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	2.92	3.10	2.97	2.85	2.89	2.77	3.45	3.46	3.42	3.25	3.30	3.13	2.67	2.91	2.64	2.62	2.64	2.58	2.17	2.37	2.45	2.23	2.18	2.29
England	2.79	3.02	2.89	2.73	2.81	2.68	3.24	3.31	3.35	3.19	3.22	3.04	2.64	2.89	2.59	2.52	2.59	2.50	2.12	2.34	2.39	2.03	2.12	2.28
Av. £/Night	ALL TOURISM, Jan – June period						HOLIDAYS – Jan – June period						VFR – Jan – June period						BUSINESS – Jan – June 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	£56	£57	£57	£57	£60	£66	£57	£62	£57	£60	£64	£71	£34	£36	£38	£36	£37	£40	£109	£104	£104	£100	£108	£108
England	£56	£56	£58	£58	£59	£66	£59	£64	£58	£61	£64	£73	£34	£35	£38	£36	£36	£40	£108	£102	£103	£107	£110	£107
Av. £/Trip	ALL TOURISM, Jan – June period						HOLIDAYS – Jan – June period						VFR – Jan – June period						BUSINESS – Jan – June 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	£163	£175	£170	£162	£172	£183	£198	£215	£196	£196	£212	£221	£91	£105	£101	£95	£97	£104	£237	£246	£256	£223	£236	£247
England	£156	£169	£166	£157	£166	£178	£191	£211	£196	£195	£207	£222	£90	£100	£99	£91	£94	£100	£229	£239	£246	£218	£233	£243

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