

GB TOURISM SURVEY - April 2011 SUMMARY OF RESULTS

1. Headlines

- In the month of April, there were 12.0 million domestic tourism trips in Great Britain, a 5% increase from 11.4 million in 2010 and the highest April total since the start of the current survey in 2006.
- The number of bednights and total expenditure also rose by 12% and 15% respectively during the month.
- Reflecting the GB trend, within England, trips grew by 8% from 9.2 million to 9.9 million.
- In England, both total nights and spending grew by 15%.

2. Trip Characteristics

- It is important to note that in April 2011, unlike April 2010, we had a two bank holiday weekend; a late Easter bank holiday and an additional bank holiday to celebrate the royal wedding. The weather was also unseasonably warm.
- During the first four months of the year there were variations in performance by trip purpose; shorter 1-3 night holiday trips and longer 4+ night holiday trips both grew by 11% in Great Britain compared to January-April 2010. In contrast, visits to friends and relatives and business travel volumes are on a par with 2010.
- Between January and April 2011, there were key differences by demographic group, the number of trips made by households without children rose by 9% while trips made by households with children fell by 3%. At the same time, the volume of trips made by the more affluent AB social grade increased (by 7%) as did the number of trips taken by C1s and C2s (up by 9% and 2% respectively) but trips taken by the less affluent DEs declined by 5% (and over the past year are down by 17%).
- In the first four months of the year, the number of trips involving a stay in self-catering accommodation increased by 14% compared to 3% within serviced accommodation.

3. Overseas Travel by UK Residents

In the year to April 2011, UK residents made 2% fewer trips abroad compared to May '09 - April '10, while spend was unchanged. Looking specifically at first four months of the year, outbound travel volumes rose by 4% compared with January-April 2010 while spend decreased by 3% at the same time. It should however be noted that outbound travel volumes declined steeply in April 2010 due to disruption caused by the Icelandic ash cloud.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 49% for the month of April (6% higher than in April 2010).
- The May accommodation business confidence monitor showed that the English tourism industry performed well over the Easter period. Just over a third (36%) of businesses reported increased visitor numbers and about two-in-five (42%) reported the same level.



Year on Year Comparison – All Trips

	TRI	PS (MILLIC	DNS)	NIG	HTS (MILL	.IONS)			
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
April '11									
GB	11.4	12.0	+5%	33.0	36.9	+12%	1,767	2,040	+15%
England	9.2	9.9	+8%	25.7	29.6	+15%	1,435	1,643	+15%
Jan-Apr '11									
GB	32.4	34.0	+5%	87.0	92.5	+6%	5,019	5,467	+9%
England	26.9	28.4	+5%	68.8	75.5	+10%	4,051	4,445	+10%

Purpose of Trip – April 2011

	TRIF	S (MILLIC	NS)	NIGH	ITS (MILLI	ONS)	SPEND (£M)					
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-			
GB												
Holiday	5.3	6.2	+18%	18.1	21.2	+18%	1,011	1,308	+29%			
Business	1.4	1.4	0%	2.8	3.6	+26%	316	303	-4%			
VFR	4.5	3.9	-12%	11.5	11.3	-2%	408	374	-8%			
England												
Holiday	4.1	4.9	+20%	13.7	16.5	+20%	828	1,018	+23%			
Business	1.2	1.3	+6%	2.2	3.1	+41%	247	266	+7%			
VFR	3.7	3.4	-10%	9.3	9.3	0%	333	313	-6%			

Purpose of Trip – Year to Date (January – April 2011)

	TRIF	PS (MILLIC	DNS)	NIGH	TS (MILLI	ONS)			
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	12.6	13.9	+11%	37.9	41.5	+10%	2,394	2,822	+18%
Business	5.6	5.6	0%	11.8	12.4	+5%	1,261	1,228	-3%
VFR	13.3	13.2	0%	34.1	33.9	-1%	1,196	1,243	+4%
England									
Holiday	9.9	11.1	+12%	29.4	32.1	+9%	1,911	2,193	+15%
Business	4.7	4.8	+3%	9.4	10.6	+12%	1,023	1,050	+3%
VFR	11.5	11.5	0%	28.1	28.9	+3%	991	1,057	+7%

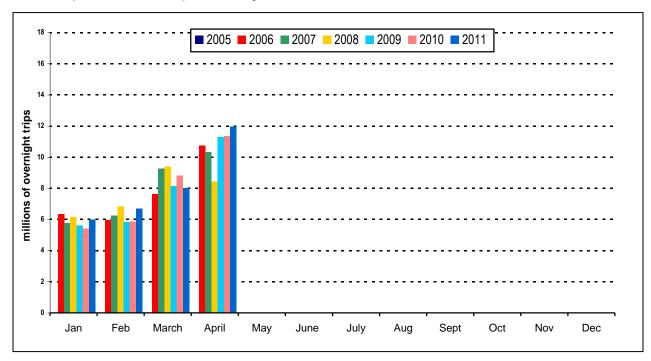
Outbound Travel - UK Residents

	T	RIPS (MILLIONS	S)		SPEND (£BN)	
	2010	2011	% +/-	2010	2011	% +/-
April	4.3	4.8	11%	2.4	2.4	-2%
January-April	14.4	15.0	4%	8.5	8.3	-3%
May '10 - Apr '11	56.6	55.5	-2%	30.9	30.7	0%

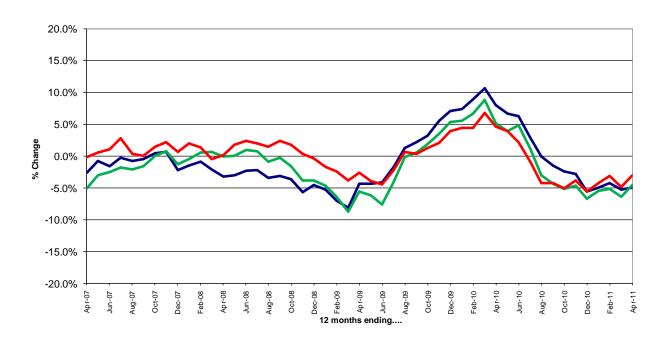
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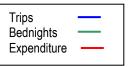


GB All Trips – Domestic Trip Volume by Month



GB All Trips - Annual Percentage Change









Important Note

The analysis on the following page shows year-on-year comparisons across a number of trip characteristics, considering:

- Month (April 2010 vs April 2011)
- Year to date (January April 2010 vs January April 2011)
- 12 month rolling (May 2009 April 2010 vs May 2010 April 2011)

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: Comparison	s with	eguival	ent nerio	nds. 201	0								Comparisons with equivalen	nt neriods	2010										
LEGEND:			Below Average	Jus, 201									Comparisons with equivalen	nt periods,	2010										
			Performance	' refers to the t	otal trins/night	e/avnanditura	to either GB o	r England in eac	ch time neriod	Those cells	marked 'ahou	e average													
	performance percentage	e' indicate whe change is mor	re the percenta e than 5 percer	ige change is n ntage points be	nore than 5 pe low the averag	rcentage poir ge. These ch	nts above the a anges are not i	average; those n necessarily stati	narked 'below stically signific	average perfo ant - they only	rmace' indica indicate thos	te where the e cells where													
	fewer unwei	further away t ghted trips, the	rom the averag % change figu	e. The number ires have been	s of unweighte 'greyed out' to	d trips are als indicate that	so displayed to they should be	indicate where treated with ca	sample sizes ution.	are relatively:	small. Where	there are 75 or													
							Britain													land			2 month rolling May 2010 - April 2011		
	Trips	Month: April 20 Bednights		Unweighted Trips	Trips	January - Apr Bednights		Trips	12 month r	Bednights		Unweighted Trips		Trips	Month: April 20 Bednights	Expenditure	Trips	Trips	January - Apri Bednights	Expenditure	Trips	12 month ro Trips	,	- April 2011 Expenditure	Trips
TOTAL	5.5%	11.9%	15.4%	1744	4.8%	6.4%	8.9%	4811	-4.9%	-4.7%	-3.1%	16974	TOTAL	7.8%	15.2%	14.5%	1445	5.4%	9.8%	9.7%	4011	-5.2%	-4.4%	-3.8%	14032
PURPOSE:													PURPOSE:												
Pure Holiday	17.9%	17.6%	29.4%	918	11.0%	9.6%	17.9%	2020	-4.0%	-6.1%	-0.7%	8423	Pure Holiday	20.0%	20.3%	22.9%	726	12.4%	9.2%	14.8%	1609	-3.5%	-6.5%	-1.9%	6719
- 1-3 nights holiday	17.9%	13.4%	16.9%	577	11.3%	9.2%	12.5%	1416	-2.7%	-3.8%	3.7%	5079	- 1-3 nights holiday	21.3%	19.1%	12.5%	471	13.8%	12.9%	11.3%	1150	-2.1%	-3.1%	2.8%	4137
- 4+ nights holiday	18.3%	22.3%	44.5%	341	10.7%	10.8%	27.2%	604	-6.2%	-7.2%	-4.8%	3344	- 4+ nights holiday	18.0%	23.7%	36.8%	254	9.1%	7.2%	21.0%	458	-6.1%	-8.3%	-6.5%	2571
VFR (on holiday)	-1.8%	14.6%	6.5%	339	-7.2%	-4.2%	1.0%	980	-11.8%	-10.1%	-2.9%	3150	VFR (on holiday)	8.7%	26.4%	17.4%	300	-5.5%	2.5%	5.2%	839	-12.3%	-9.4%	-3.4%	2667
HOLIDAY (TOTAL)	12.1%	17.7%	25.6%	1257	4.6%	5.2%	14.2%	2999	-6.3%	-7.1%	-1.1%	11573	HOLIDAY (TOTAL)	16.6%	23.0%	22.4%	1025	5.8%	7.3%	12.8%	2445	-6.2%	-7.3%	-2.1%	9384
VFR (non-holiday)	-21.6%	-21.6%	-25.1%	262	7.1%	4.5%	8.0%	981	0.6%	5.2%	1.3%	3041	VFR (non-holiday)	-26.9%	-28.1%	-29.5%	217	4.9%	2.6%	8.5%	864	-0.7%	2.5%	2.0%	2689
VFR (TOTAL)	-11.5%	-1.8%	-8.3%	601	-0.4%	-0.5%	3.9%	1961	-6.0%	-4.0%	-1.1%	6191	VFR (TOTAL)	-9.7%	0.2%	-6.0%	517	-0.4%	2.5%	6.7%	1703	-6.8%	-4.5%	-1.1%	5358
Business RDAs:	0.2%	26.3%	-4.1%	170	-0.5%	4.5%	-2.6%	671	-8.2%	-4.6%	-12.8%	1918	Business RDAs:	6.0%	41.4%	7.7%	151	3.1%	12.4%	2.6%	577	-9.2%	-2.6%	-12.7%	1599
Adv West Midlands	-10.2%	12.7%	5.3%	107	-4.6%	0.0%	6.1%	310	-5.0%	9.4%	-5.1%	1093	Adv West Midlands	-10.2%	12.7%	5.3%	107	-4.6%	0.0%	6.1%	310	-5.0%	9.4%	-5.1%	1093
East of England	21.1%	28.4%	11.9%	158	19.8%	22.6%	12.3%	406	-8.5%	-3.8%	-3.7%	1354	East of England	21.1%	28.4%	11.9%	158	19.8%	22.6%	12.3%	406	-8.5%	-3.8%	-3.7%	1354
East Midlands	11.0%	4.1%	8.5%	134	17.9%	14.7%	35.6%	367	1.9%	-5.1%	8.2%	1166	East Midlands	11.0%	4.1%	8.5%	134	17.9%	14.7%	35.6%	367	1.9%	-5.1%	8.2%	1166
London	-12.6%	-18.8%	3.9%	123	-11.3%	4.3%	-7.2%	445	-0.7%	4.8%	7.0%	1447	London	-12.6%	-18.8%	3.9%	123	-11.3%	4.3%	-7.2%	445	-0.7%	4.8%	7.0%	1447
North West	5.6%	17.3%	0.0%	182	8.0%	11.9%	6.0%	525	-7.6%	-4.9%	-5.8%	1806	North West	5.6%	17.3%	0.0%	182	8.0%	11.9%	6.0%	525	-7.6%	-4.9%	-5.8%	1806
ONE North East	7.4%		-5.5%	53	18.9%	9.7%	1.1%	177	-1.7%	-6.6%	-2.2%	535	ONE North East	7.4%	2.7%	-5.5%	53	18.9%	9.7%	1.1%	177	-1.7%	-6.6%	-2.2%	535
South East England	7.9%	27.4%	32.3%	243	-7.7%	-0.9%	3.6%	652	-14.4%	-12.5%	-14.3%	2307	South East England	7.9%	27.4%	32.3%	243	-7.7%	-0.9%	3.6%	652	-14.4%	-12.5%	-14.3%	2307
South West	24.3%	36.9%	36.7%	312	15.0%	15.9%	26.2%	735	-3.9%	-4.2%	-6.9%	2990	South West	24.3%	36.9%	36.7%	312	15.0%	15.9%	26.2%	735	-3.9%	-4.2%	-6.9%	2990
Yorkshire Forward	0.6%	-9.2%	1.8%	153	8.7%	14.4%	16.8%	426	-2.2%	-5.1%	5.4%	1493	Yorkshire Forward	0.6%	-9.2%	1.8%	153	8.7%	14.4%	16.8%	426	-2.2%	-5.1%	5.4%	1493
LOCATION TYPE:													LOCATION TYPE:												
Seaside	3.2%	16.4%	19.6%	415	5.4%	9.1%	19.1%	828	-9.4%	-8.7%	-7.8%	3742	Seaside	10.5%	21.0%	22.8%	348	7.0%	6.4%	19.3%	697	-10.2%	-11.7%	-8.6%	3022
Large city/ large town	2.0%	5.5%	7.4%	596	4.1%	9.0%	4.6%	2011	-4.8%	-3.6%	-0.8%	6311	Large city/ large town	3.1%	3.9%	4.6%	518	4.1%	14.3%	4.0%	1736	-4.3%	0.6%	-0.4%	5489
Small town	3.4%	6.5%	16.7%	406	6.0%	4.6%	12.9%	1189	-1.8%	0.3%	2.5%	4035	Small town	3.7%	14.0%	14.9%	320	6.4%	9.4%	16.8%	955	-3.5%	-3.6%	-2.0%	3224
Countryside/ village	21.9%	24.9%	29.3%	368	5.6%	3.4%	6.4%	863	-6.1%	-6.3%	-8.4%	3236	Countryside/ village	26.3%	30.8%	30.8%	295	7.2%	5.2%	8.1%	689	-6.0%	-3.3%	-7.6%	2571
AGE:													AGE:												
16-24	-5.6%	11.3%	37.8%	206	-4.1%	8.2%	25.5%	621	-0.9%	11.6%	5.1%	2060	16-24	-5.9%	3.4%	37.9%	175	-4.0%	11.4%	25.9%	534	0.9%	10.9%	4.9%	1772
25-34	10.0%	27.5%	2.9%	301	1.5%	4.0%	5.0%	777	-10.4%	-15.1%	-10.8%	2677	25-34	10.1%	34.8%	2.6%	249	-5.5%	-1.0%	-0.5%	622	-13.7%	-19.1%	-14.1%	2187
35-44	-3.7%	-1.2%	-0.6%	395	4.4%	3.3%	2.8%	1030	-7.5%	-5.9%	-6.6%	3695	35-44	2.5%	11.6%	2.5%	325	10.2%	15.2%	8.7%	864	-5.8%	-2.4%	-5.3%	3062
45-54	29.8%	37.0%	31.1%	324	19.8%	22.1%	14.1%	908	4.4%	1.8%	1.8%	3043	45-54	40.4%	59.5%	44.4%	279	26.6%	31.3%	21.9%	760	5.1%	6.0%	2.5%	2473
55+	2.6%	5.0%	19.7%	517	2.5%	2.5%	6.6%	1474	-6.7%	-7.4%	-1.8%	5500	55+	-0.2%	-3.4%	6.0%	415	0.5%	1.6%	1.5%	1228	-8.3%	-8.6%	-3.8%	4537
SEG:													SEG:												
AB	5.1%	14.2%	8.1%	599	6.6%	10.1%	8.4%	1679	-0.5%	0.6%	0.4%	5462	AB	12.4%	20.9%	10.6%	520	10.4%	14.9%	10.9%	1453	0.1%	3.4%	1.4%	4608
C1	15.7%	25.5%	48.9%	536	8.8%	14.3%	22.3%	1515	-4.9%	-5.8%	-3.3%	5281	C1	10.8%	26.3%	44.6%	428	5.3%	13.8%	19.3%	1239	-5.1%	-5.5%	-4.2%	4362
C2	7.2%	11.1%	-4.2%	318	1.6%	2.9%	-7.4%	806	-3.5%	1.5%	-1.1%	3090	C2	9.0%	19.6%	-10.7%	249	5.1%	18.6%	-2.7%	657	-5.7%	0.4%	-5.6%	2482
DE CHILDREN IN H/H:	-14.6%	-12.9%	-4.1%	291	-5.0%	-10.6%	1.6%	812	-16.7%	-18.5%	-15.8%	3140	DE CUIL DOEN IN LIGHT	-10.7%	-16.1%	-5.1%	247	-8.2%	-16.4%	-2.7%	647	-18.0%	-21.3%	-16.4%	2545
	4.00/	0.00/	2.00/	688	2.00/	2.00/	4 70/	4004	E 00/	F 00/	0.50/	6162	CHILDREN IN H/H:	0.40/	44.00/	4.00/		F 200/	0.00/	4 70/	4004	0.70/	4.00/	4.00/	5037
Any	-1.6%	2.0%	3.2%	1056	-3.2%	-3.2%	1.7%	1664 3147	-5.3%	-5.2%	-2.5%	10812	Any	0.1%	11.0%	4.2%	574 872	-5.3%	-0.2%	1.7%	1364 2643	-6.7%	-4.9%	-4.3%	8986
None ACCOMMODATION:	9.6%	18.5%	21.7%	1038	8.9%	11.6%	12.1%	3/4/	-4.7%	-4.4%	-3.3%	10812	None ACCOMMODATION:	12.4%	18.7%	20.0%	872	10.8%	14.9%	13.3%	2643	-4.6%	-4.2%	-3.5%	8988
Commercial accom	5.1%	5.8%	12.7%	984	6.0%	6.7%	8.9%	2617	-2.5%	-3.5%	-1.9%	9921	Commercial accom	6.8%	8.1%	10.4%	814	6.9%	9.9%	9.6%	2156	-2.6%	-4.0%	-2.8%	8088
- Serviced accom	-5.4%	-12.5%	2.7%	600	2.8%	-3.4%	4.6%	1939	-1.9%	-5.6%	-3.1%	6496	- Serviced accom	-5.0%	-15.2%	3.3%	506	5.0%	1.0%	7.6%	1626	-1.4%	-5.1%	-3.1%	5431
- Hotel/motel/guesthouse	-5.8%	-15.8%	3.5%	524	3.1%	-3.3%	5.8%	1756	-1.6%	-5.9%	-2.6%	5745	- Hotel/motel/guesthouse	-5.6%	-16.7%	4.6%	441	4.8%	1.9%	8.6%	1468	-1.5%	-5.5%	-2.6%	4813
- Bed & Breakfast	-8.0%	2 00/	-11.6%	66	-3.8%	-6.7%	-7.8%	163	-5.0%	-1.1%	-5.0%	682	- Bed & Breakfast	-5.6%	-12.4%	-14.8%	57	3.7%	-9.5%	-5.6%	141	-1.5%	-2.9%	-7.1%	553
	21.4%	22.9%	34.6%		-3.8% 14.3%	13.7%	-7.8% 24.2%	763 582			-5.0%			30.1%	37.9%	30.8%		15.0%	-9.5% 17.2%	18.9%		-1.5%			
Total self-catering rented -Camping & Caravanning	21.4%	35.4%		348		20.8%			-3.6%	-2.1%		3153	Total self-catering rented -Camping & Caravanning	27.9%			283				457		-3.5% -8.7%	-0.2%	2450
(inc. owned caravans)	-		43.1%	284	19.5%		17.2%	402		-3.1%	-5.0%	2425	(inc. owned caravans)		41.7%	40.7%	217	20.6%	23.0%	18.8%	313	-7.9%		-12.3%	1806
-Other self-catering rented	14.2%	3.4%	32.5%	136	10.6%	7.4%	30.9%	288	-2.5%	-2.7%	5.8%	1227	-Other self-catering rented	31.5%	18.6%	28.8%	107	10.5%	10.4%	23.4%	213	-0.9%	-1.5%	7.2%	954
Hostels	144.6%	74.6%	61.9%	26	2.4%	-3.7%	-7.9%	60	3.9%	-2.6%	-20.6%	212	Hostels	112.3%	6.7%	-19.0%	18	-16.4%	-41.8%		44	6.0%	-4.2%	-25.2%	156
Own home/friends'/relatives'	3.4%	17.0%	19.5%	722	4.7%	7.2%	9.9%	2109	-8.1%	-5.4%	-7.2%	6811	Own home/friends'/relatives'	5.8%	20.1%	22.0%	596	4.4%	9.5%	10.8%	1786	-8.5%	-5.2%	-7.2%	5734