

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.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			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)

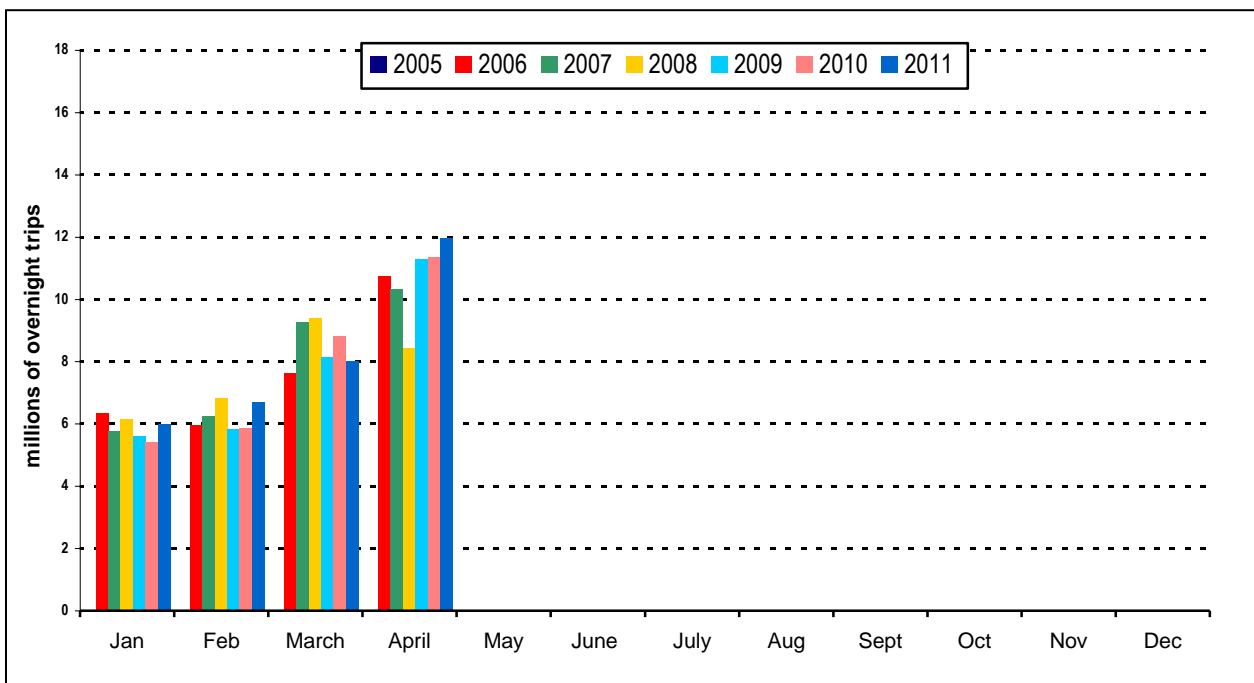
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	12.6	13.9	+11%	37.9	41.5	+10%	2,394	2,822	+18%
Business	5.6	5.6	0%	11.8	12.4	+5%	1,261	1,228	-3%
VFR	13.3	13.2	0%	34.1	33.9	-1%	1,196	1,243	+4%
England									
Holiday	9.9	11.1	+12%	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

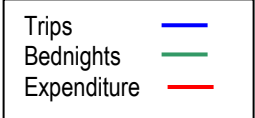
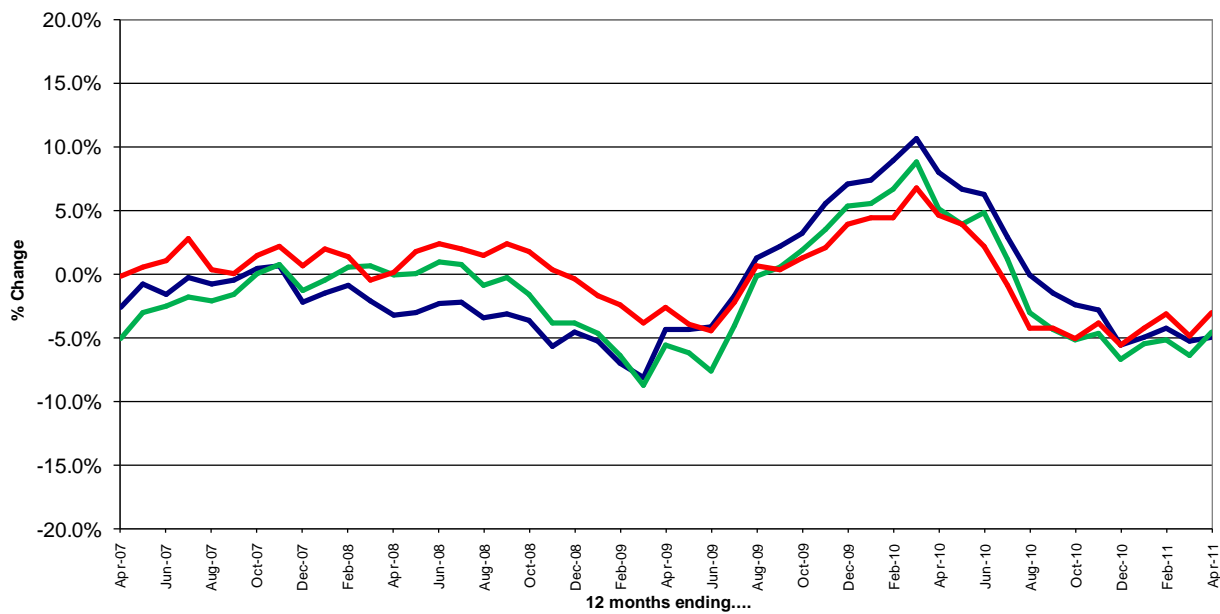
	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	2011	% +/-	2010	2011	% +/-
April	4.3	4.8	11%	2.4	2.4	-2%
January-April	14.4	15.0	4%	8.5	8.3	-3%
May '10 – Apr '11	56.6	55.5	-2%	30.9	30.7	0%

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 (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.

