VisitEngland

GB TOURISM SURVEY - August 2011
SUMMARY OF RESULTS

1. Headlines

- In the month of August, there were 15 million domestic tourism trips in Great Britain, an 8% increase from 13.9 million in 2010.
- The number of bednights also rose by 7%, while expenditure increased by 21% compared to August 2010.
- Broadly reflecting the GB trend, in England, trips grew by 5% from 11.7 million to 12.2 million.
- In England, both total nights and spending rose by 4% and 15% respectively.

2. Trip Characteristics

- During the first eight months of 2011, the overall growth in trip volumes reflects increases across all trip purposes when compared to last year; business trips grew by 13% suggesting continued recovery within this sector, pure holiday trips rose by 4% and visits to friends and relatives by 3%.
- Expenditure on domestic overnight trips continued to increase more rapidly than trip volumes; the value of trips rose by 14% during the first eight months of the year compared to a 5% increase in volume.
- Between January-August 2011, there has been a slight decline in the number of trips taken by those aged under 35, while volumes have increased among those aged 35+.
- While trip volumes have increased so far this year among the higher social grades, AB (by 8%) and C1 (by 9%), those in both the C2 and DE grades have taken 1% fewer trips compared to last year.
- Most types of accommodation have benefitted from increased trip volumes. However, trips involving a stay in a bed & breakfast have fallen back by 5%.

3. Overseas Travel by UK Residents

- In the first eight months of 2011, UK residents made a similar number of trips abroad compared to the same period in 2010, while spend fell by 4%.

4. Other Tourism Surveys

- VisitEngland's Accommodation Business Confidence Monitor suggested that businesses had a reasonable summer holiday period, with 32% of businesses reporting increased visitors and 40% reporting the same level as last summer.
- The Q3 England Attractions Monitor showed that visits to visitor attractions in August increased only marginally (by less than 0.5%) compared to August 2010.

KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
August '11									
GB	13.9	15.0	+8%	55.3	59.0	+7%	2,591	3,128	+21%
England	11.7	12.2	+5%	44.4	46.0	+4%	2,086	2,402	+15%
Jan-Aug '11									
GB	81.1	85.4	+5%	261.4	273.2	+5%	13,761	15,717	+14%
England	66.8	70.1	+5%	205.5	215.5	+5%	10,993	12,436	+13%

Purpose of Trip – August 2011

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	8.7	9.0	+4%	38.5	40.9	+6%	1,911	2,204	+15%
Business	1.0	1.6	+59%	2.6	3.8	+47%	206	391	+90%
VFR	4.0	4.2	+5%	13.1	13.4	+2%	438	487	+11%
England									
Holiday	7.1	7.1	0%	30.1	30.6	+1%	1,525	1,632	+7%
Business	0.9	1.4	+66%	2.3	3.2	+43%	173	340	+97%
VFR	3.5	3.5	+1%	11.0	11.5	+4%	353	394	+12%

Purpose of Trip – Year to Date (January - August 2011)

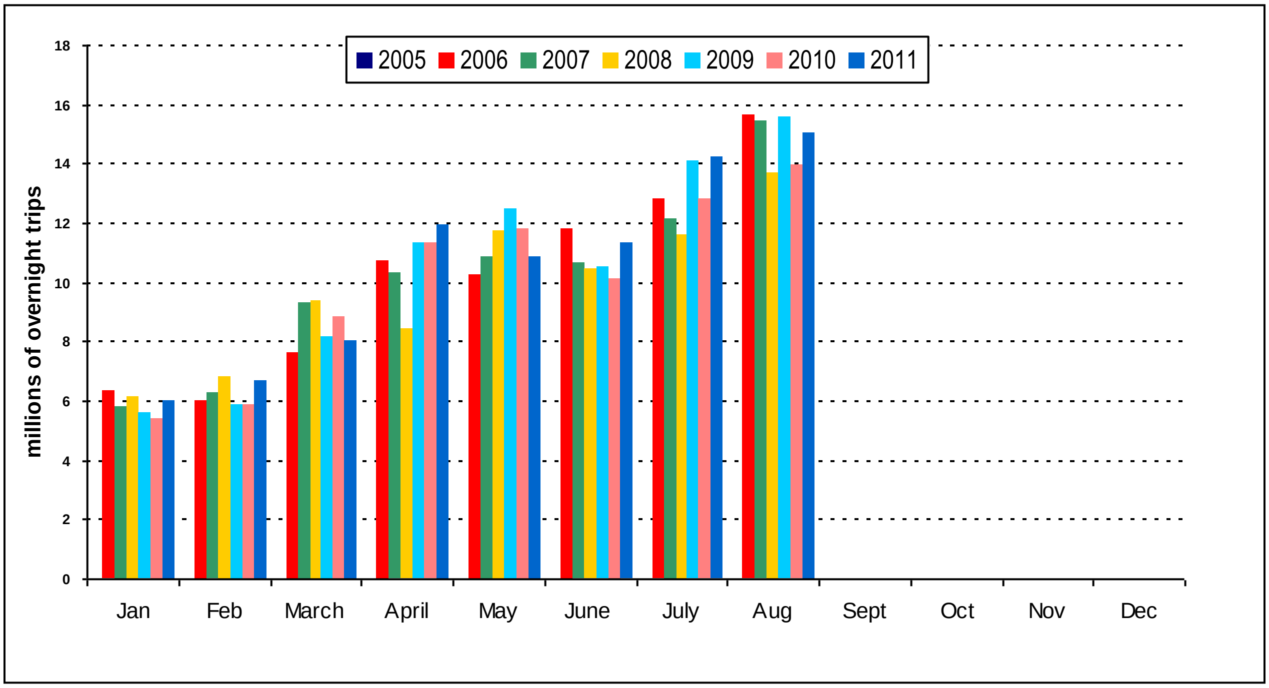
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	40.7	42.5	+4%	153.0	159.3	+4%	8,418	9,594	+14%
Business	10.6	11.9	+13%	25.1	26.6	+6%	2,327	2,844	+22%
VFR	27.6	28.3	+3%	76.7	78.6	+3%	2,714	2,940	+8%
England									
Holiday	32.1	33.3	+4%	116.9	119.8	+3%	6,577	7,346	+12%
Business	8.8	10.2	+16%	19.5	21.8	+11%	1,898	2,357	+24%
VFR	24.0	24.4	+2%	64.0	66.4	+4%	2,264	2,454	+8%

Outbound Travel – UK Residents

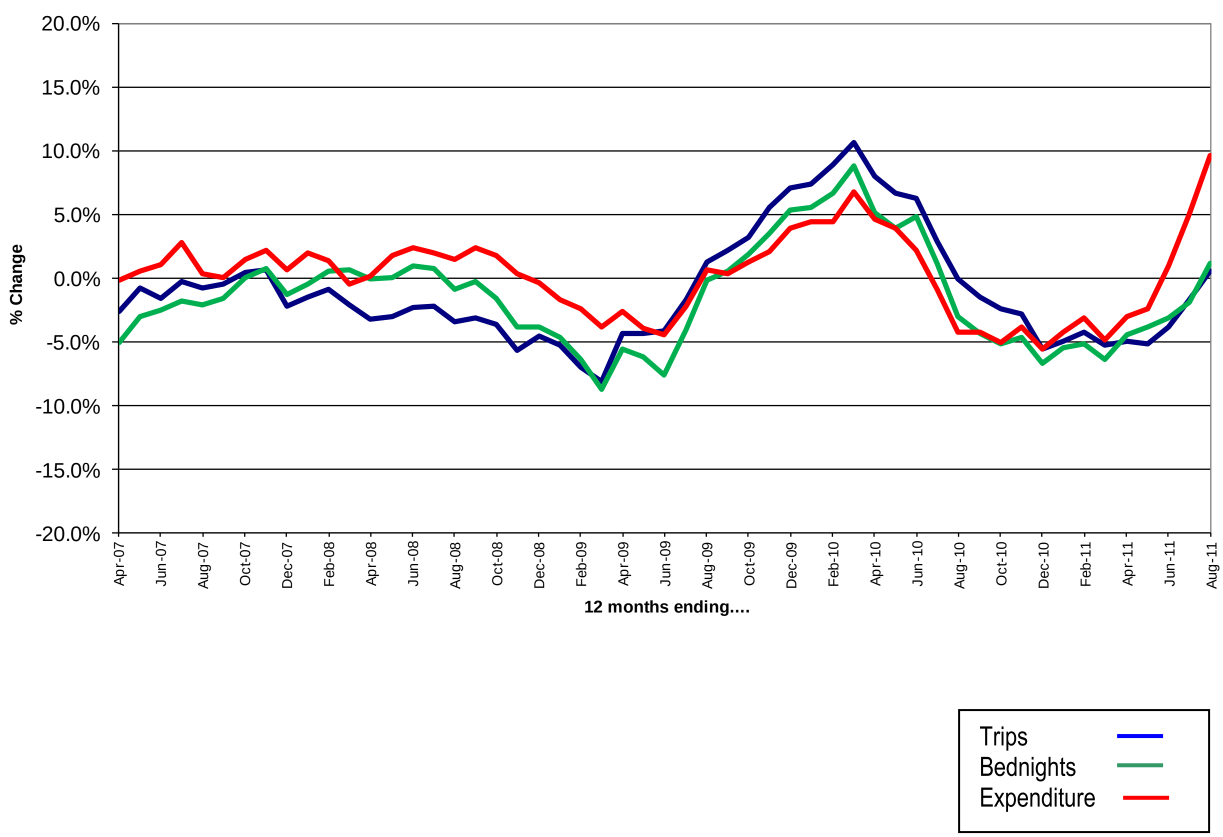
	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	**2011**	**% +/-**	**2010**	**2011**	**% +/-**
August	7.7	7.1	-7%	4.5	4.1	-10%
January-August	38.4	38.5	0%	22.2	21.2	-4%
Sep '10 – Aug '11	56.4	54.6	-1%	31.7	30.9	-3%

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 (August 2010 vs August 2011)
- Year to date (January - August 2010 vs January – August 2011)
- 12 month rolling (September 2009 – August 2010 vs September 2010 – August 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: Comparisons with equivalent periods, 2010

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 performace' 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: August 2011			Unweighted	YTD: January - August 2011			Unweighted	2 month rolling September 2010 - August 201			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	7.8%	6.6%	20.7%	2263	5.3%	4.5%	14.2%	12447	0.6%	1.1%	9.6%	17207
PURPOSE:												
Pure Holiday	4.0%	6.2%	15.3%	1381	4.4%	4.1%	14.0%	6368	0.4%	0.8%	10.2%	8394
- 1-3 nights holiday	4.7%	4.6%	15.2%	642	4.5%	4.1%	11.5%	3718	0.1%	-0.2%	8.9%	5056
- 4+ nights holiday	3.5%	6.6%	15.4%	738	4.2%	4.1%	16.2%	2650	0.9%	1.3%	11.5%	3338
VFR (on holiday)	17.2%	5.3%	27.8%	387	3.4%	1.7%	9.1%	2272	-4.8%	-4.2%	7.1%	3277
HOLIDAY (TOTAL)	6.6%	6.0%	16.7%	1768	4.1%	3.6%	13.2%	8640	-1.1%	-0.5%	9.6%	11672
VFR (non-holiday)	-10.1%	-4.2%	-9.8%	258	2.1%	3.6%	7.2%	1986	0.9%	4.2%	6.0%	2981
VFR (TOTAL)	4.6%	1.8%	11.2%	645	2.8%	2.5%	8.3%	4258	-2.1%	-0.7%	6.6%	6258
Business	59.3%	47.2%	89.8%	200	12.8%	5.8%	22.2%	1454	6.0%	3.1%	11.4%	2084
RDAs:												
Adv West Midlands	17.6%	6.5%	35.6%	150	1.2%	-5.1%	7.2%	785	-4.7%	-2.8%	-4.5%	1128
East of England	48.3%	79.2%	73.7%	195	11.6%	10.5%	13.2%	1033	-1.3%	2.0%	0.2%	1383
East Midlands	-7.7%	-10.0%	-6.2%	165	13.8%	12.6%	28.0%	920	6.7%	1.7%	17.1%	1215
London	-18.2%	8.7%	29.4%	133	-6.1%	6.9%	5.6%	991	-1.7%	7.0%	13.9%	1466
North West	40.2%	50.2%	37.8%	263	10.5%	8.6%	11.5%	1328	1.5%	2.7%	7.5%	1870
ONE North East	25.8%	6.6%	26.8%	76	22.2%	25.0%	9.6%	421	15.3%	15.9%	10.8%	583
South East England	11.3%	-6.0%	25.4%	331	-1.4%	-4.1%	15.9%	1685	-6.6%	-8.0%	2.9%	2328
South West	-10.8%	-9.7%	-6.2%	409	4.8%	3.4%	16.2%	2140	-0.5%	-0.5%	10.1%	2917
Yorkshire Forward	-13.8%	-17.5%	1.0%	173	2.0%	4.1%	9.9%	1042	-1.5%	-0.9%	12.6%	1449
LOCATION TYPE:												
Seaside	3.5%	1.4%	3.9%	639	3.3%	4.7%	13.4%	2852	-0.4%	1.8%	10.7%	3727
Large city/ large town	-5.8%	-14.9%	22.6%	655	5.3%	3.0%	13.5%	4447	0.9%	-1.9%	10.1%	6429
Small town	26.6%	37.6%	45.2%	530	6.8%	6.0%	14.9%	2952	1.5%	5.4%	8.0%	4109
Countryside/ village	19.2%	13.1%	25.2%	516	7.7%	3.9%	16.2%	2490	0.7%	-0.7%	9.5%	3332
AGE:												
16-24	-9.9%	-3.8%	-7.7%	229	-1.5%	-1.5%	15.2%	1471	0.3%	5.5%	12.7%	2085
25-34	6.2%	3.9%	24.8%	355	-0.4%	2.8%	10.7%	1942	-5.7%	-4.3%	6.2%	2700
35-44	4.1%	3.3%	23.6%	532	4.4%	1.4%	12.6%	2709	-0.3%	0.5%	7.2%	3670
45-54	14.6%	12.2%	15.4%	442	11.8%	11.0%	17.7%	2296	8.4%	7.6%	14.4%	3115
55+	16.4%	11.5%	32.1%	706	8.5%	6.5%	14.5%	4029	0.2%	-1.0%	9.1%	5638
SEG:												
AB	6.8%	-0.2%	26.6%	675	7.8%	4.9%	19.5%	4142	4.4%	3.4%	16.0%	5665
C1	23.6%	28.8%	41.0%	759	9.0%	12.3%	21.2%	3887	3.0%	7.4%	13.2%	5419
C2	-9.7%	-6.7%	-8.7%	420	-0.9%	-1.2%	-1.0%	2223	-3.4%	-0.9%	-0.4%	3052
DE	1.9%	-2.0%	0.3%	409	-1.2%	-3.7%	1.1%	2194	-9.3%	-12.3%	-6.5%	3071
CHILDREN IN H/H:												
Any	9.3%	7.9%	22.7%	1020	-0.5%	-1.4%	7.0%	4531	-1.8%	-0.8%	6.0%	6154
None	6.7%	5.4%	19.6%	1243	8.4%	7.8%	17.4%	7915	1.7%	2.0%	11.1%	11053
ACCOMMODATION:												
Commercial accom	13.5%	14.5%	20.7%	1497	6.1%	5.9%	14.0%	7469	3.3%	4.0%	10.4%	10095
- Serviced accom	12.9%	6.7%	19.2%	765	4.9%	0.3%	11.8%	4662	2.7%	-0.8%	8.4%	6595
- Hotel/motel/guesthouse	14.6%	8.0%	20.0%	654	6.4%	2.2%	13.4%	4137	3.6%	0.1%	9.2%	5879
- Bed & Breakfast	10.8%	13.6%	26.6%	101	-5.0%	-7.1%	-1.4%	475	-4.0%	-2.5%	2.6%	657
Total self-catering rented	13.0%	19.2%	23.8%	708	7.7%	8.9%	18.8%	2618	4.4%	7.6%	16.5%	3234
-Camping & Caravanning (inc. owned caravans)	-6.6%	-1.0%	3.0%	493	2.7%	2.8%	11.0%	1980	-0.7%	1.2%	7.6%	2385
-Other self-catering rented	52.7%	50.2%	44.2%	296	17.5%	17.9%	27.3%	1036	12.3%	14.8%	23.2%	1339
Hostels	28.4%	22.6%	17.4%	22	-8.0%	-8.8%	-7.7%	133	-2.5%	-4.7%	-11.2%	197
Own home/friends'/relatives'	0.0%	-4.8%	23.1%	756	4.9%	3.4%	15.0%	4834	-3.0%	-1.6%	5.5%	6872

Comparisons with equivalent periods, 2010

England

	Month: August 2011			Unweighted	YTD: January - August 2011			Unweighted	2 month rolling September 2010 - August 201			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	4.5%	3.6%	15.1%	1838	5.0%	4.9%	13.1%	10221	-0.5%	0.1%	7.8%	14164
PURPOSE:												
Pure Holiday	0.0%	1.4%	7.0%	1082	3.8%	2.5%	11.7%	4994	0.0%	-0.9%	8.1%	6648
- 1-3 nights holiday	2.5%	3.6%	11.4%	532	5.0%	4.9%	11.7%	3000	0.7%	0.1%	9.0%	4109
- 4+ nights holiday	-2.5%	0.8%	4.6%	547	1.8%	1.3%	11.7%	1986	-1.1%	-1.5%	7.1%	2526
VFR (on holiday)	21.5%	18.5%	30.1%	332	5.0%	5.4%	12.2%	1962	-5.3%	-5.2%	6.4%	2789
HOLIDAY (TOTAL)	4.3%	4.5%	9.5%	1415	4.1%	3.2%	11.8%	6955	-1.6%	-2.1%	7.8%	9435
VFR (non-holiday)	-20.0%	-16.3%	-10.6%	213	-1.3%	1.4%	3.5%	1712	-2.2%	0.9%	3.2%	2596
VFR (TOTAL)	1.2%	4.3%	11.6%	545	1.9%	3.7%	8.4%	3674	-3.8%	-2.6%	5.0%	5386
Business	66.0%	42.7%	96.5%	175	15.5%	11.4%	24.2%	1241	5.9%	8.1%	11.3%	1746
RDAs:												
Adv West Midlands	17.6%	6.5%	35.6%	150	1.2%	-5.1%	7.2%	785	-4.7%	-2.8%	-4.5%	1128
East of England	48.3%	79.2%	73.7%	195	11.6%	10.5%	13.2%	1033	-1.3%	2.0%	0.2%	1383
East Midlands	-7.7%	-10.0%	-6.2%	165	13.8%	12.6%	28.0%	920	6.7%	1.7%	17.1%	1215
London	-18.2%	8.7%	29.4%	133	-6.1%	6.9%	5.6%	991	-1.7%	7.0%	13.9%	1466
North West	40.2%	50.2%	37.8%	263	10.5%	8.6%	11.5%	1328	1.5%	2.7%	7.5%	1870
ONE North East	25.8%	6.6%	26.8%	76	22.2%	25.0%	9.6%	421	15.3%	15.9%	10.8%	583
South East England	11.3%	-6.0%	25.4%	331	-1.4%	-4.1%	15.9%	1685	-6.6%	-8.0%	2.9%	2328
South West	-10.8%	-9.7%	-6.2%	409	4.8%	3.4%	16.2%	2140	-0.5%	-0.5%	10.1%	2917
Yorkshire Forward	-13.8%	-17.5%	1.0%	173	2.0%	4.1%	9.9%	1042	-1.5%	-0.9%	12.6%	1449
LOCATION TYPE:												
Seaside	5.5%	1.2%	3.3%	519	3.4%	3.9%	12.6%	2280	-1.0%	-0.1%	8.4%	3000
Large city/ large town	-10.5%	-18.3%	16.4%	552	3.2%	3.0%	10.3%	3816	-0.9%	-1.7%	7.3%	5516
Small town	22.0%	39.8%	43.5%	410	7.0%	11.1%	19.5%	2351	0.0%	4.8%	8.2%	3282
Countryside/ village	12.7%	6.8%	12.1%	408	8.9%	1.7%	14.3%	1991	0.8%	-2.3%	8.5%	2659
AGE:												
16-24	-17.2%	-8.5%	-22.6%	183	-2.7%	-1.8%	14.4%	1248	-0.6%	2.1%	11.2%	1777
25-34	6.7%	12.6%	28.6%	297	-3.8%	2.8%	9.0%	1569	-9.0%	-5.1%	3.3%	2197
35-44	2.8%	1.8%	22.2%	443	7.0%	5.6%	12.7%	2240	1.4%	3.1%	7.0%	3047
45-54	13.3%	4.3%	10.0%	350	15.0%	11.0%	20.6%	1884	8.9%	5.8%	14.9%	2540
55+	10.1%	5.8%	22.8%	563	5.9%	4.8%	10.1%	3272	-2.6%	-3.0%	5.1%	4596
SEG:												
AB	0.7%	-8.0%	17.1%	538	7.3%	4.1%	15.4%	3443	3.3%	2.4%	12.2%	4713
C1	22.9%	29.7%	39.8%	633	8.5%	15.9%	23.2%	3222	2.6%	9.6%	14.0%	4502
C2	-9.7%	-5.0%	-9.5%	350	1.1%	0.7%	2.5%	1801	-4.6%	-3.4%	-0.7%	2464
DE	-4.5%	-8.6%	-15.4%	314	-4.5%	-8.4%	-5.6%	1726	-11.9%	-16.7%	-10.9%	2452
CHILDREN IN H/H:												
Any	8.2%	7.4%	20.3%	832	-1.2%	0.3%	7.7%	3679	-2.8%	0.4%	5.8%	5035
None	2.0%	0.6%	12.3%	1006	8.1%	7.3%	15.5%	6535	0.6%	0.0%	8.7%	9124
ACCOMMODATION:												
Commercial accom	9.2%	9.8%	16.6%	1215	5.3%	6.2%	13.1%	6033	1.9%	3.1%	9.0%	8180
- Serviced accom	9.3%	-0.5%	16.1%	648	4.9%	2.0%	12.4%	3880	2.0%	-0.4%	8.2%	5488
- Hotel/motel/guesthouse	9.2%	0.6%	16.8%	552	6.1%	4.7%	14.3%	3449	2.7%	1.1%	9.2%	4904
- Bed & Breakfast	11.6%	-1.4%	19.4%	85	-3.6%	-11.1%	-2.9%	386	-2.8%	-6.8%	0.9%	529
Total self-catering rented	5.7%	15.8%	17.7%	538	5.2%	8.2%	15.7%	1998	1.2%	5.5%	12.8%	2468
-Camping & Caravanning (inc. owned caravans)	-1.7%	5.9%	9.8%	401	5.2%	7.0%	16.8%	1513	0.0%	2.9%	9.2%	1811
-Other self-catering rented	28.3%	34.2%	26.7%	199	10.1%	13.3%	17.1%	751	6.9%	11.1%	15.9%	994
Hostels	40.4%	39.8%	20.0%	20	-8.6%	-22.1%	-21.3%	102	-2.7%	-15.4%	-20.4%	154
Own home/friends'/relatives'	-1.5%	-4.1%	10.8%	621	4.7%	3.9%	12.8%	4055	-3.5%	-2.7%	2.9%	5793