

GB TOURISM SURVEY - December 2011

SUMMARY OF RESULTS



1. Headlines

- In the month of December, there were 11.1 million domestic overnight tourism trips in Great Britain, a 34% increase from 8.2 million in December 2010, which in turn saw a 22% decrease as a result of snow disruption.
- Bednights and amount spent also increased, by 28% and 39% respectively.
- Considering the year January to December 2011, trip volumes were 9% higher than in 2010, while expenditure grew by 15%, though this is in the context of CPI inflation of 4-5% through most of the year.
- Reflecting the GB trend, in England, trips in December grew by 33% from 6.9 million in 2010 to 9.2 million in 2011, and both total nights and spending also increased in England, by 28% and 33% respectively.

2. Trip Characteristics

- Temperatures in December 2011 were just above seasonal norms, whereas December 2010 was the coldest for a century, with snowfall causing widespread travel disruption.
- Across all trip types, trip volumes increased in Great Britain in December 2011 compared to December 2010, particularly for holidays and visits to friends and relatives (VFR), which increased by 42% and 34% respectively. Volumes for business trips increased by 9%.
- For the year January to December 2011, trips, bednights and expenditure increased for all trip purposes. Business trips saw the greatest increase of 14% in the number of trips taken, while expenditure on these trips increased by 21%. VFR trips increased by 10% and holidays increased by 7%, while expenditure for both increased by 13%.
- During the year, trip volumes in Great Britain increased for all age groups, social grades and household types. However, they increased particularly among higher age groups (35+), the higher social grades (AB and C1) and among those without children.
- Most types of accommodation benefited from the increase in trip volumes; this was particularly the case for hotels/guest houses and self-catering accommodation, while bed & breakfasts did not benefit to the same extent, with a 1% increase in volumes for the year.
- All English regions saw an increase in trip volumes in 2011 except London (2.5% decrease), though the capital saw an increase in trip volumes in 2010 compared to 2009, the only region of the country to do so. The North East (21%), East Midlands (17%), East of England (17%) and Yorkshire (17%) particularly benefited from the increase in trip volumes throughout the year.

3. Overseas Travel by UK Residents

- From January to December 2011, there was just a 1% increase in trips abroad compared to 2010 leaving levels 19% lower than in the peak year of 2008. Spend decreased slightly, by 2%. The month of December saw a 14% increase in trip volumes compared to 2010, when overseas travel was disrupted by snow.

4. Other Tourism Surveys

- The UK Occupancy survey showed room occupancy increased from 49% in December 2010 to 52% in December 2011.
- In the Accommodation Business Confidence monitor, 41% of businesses interviewed in January 2012 reported that in 2011 they had more visitors than in 2010, while 25% had fewer.
- The England Attractions Monitor reported that visits to visitor attractions in England increased by 28% year-on-year in December 2011.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
December '11									
GB	8.2	11.1	+34%	25.3	32.3	+28%	1,216	1,691	+39%
England	6.9	9.2	+33%	20.4	26.1	+28%	990	1,321	+33%
Jan-Dec '11									
GB	115.7	126.6	+9%	361.4	387.3	+7%	19,797	22,666	+15%
England	95.5	104.3	+9%	285.0	306.8	+8%	15,842	17,914	+13%

Purpose of Trip – December 2011

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	2.1	3.0	+42%	5.7	7.7	+34%	523	681	+30%
Business	1.1	1.2	+9%	2.0	2.5	+23%	203	291	+43%
VFR	5.0	6.6	+34%	17.4	21.7	+25%	473	661	+40%
England									
Holiday	1.9	2.4	+28%	4.8	5.9	+24%	463	549	+19%
Business	0.9	0.8	-1%	1.5	1.8	+19%	163	199	+22%
VFR	4.1	5.7	+39%	14.0	18.0	+29%	360	527	+46%

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

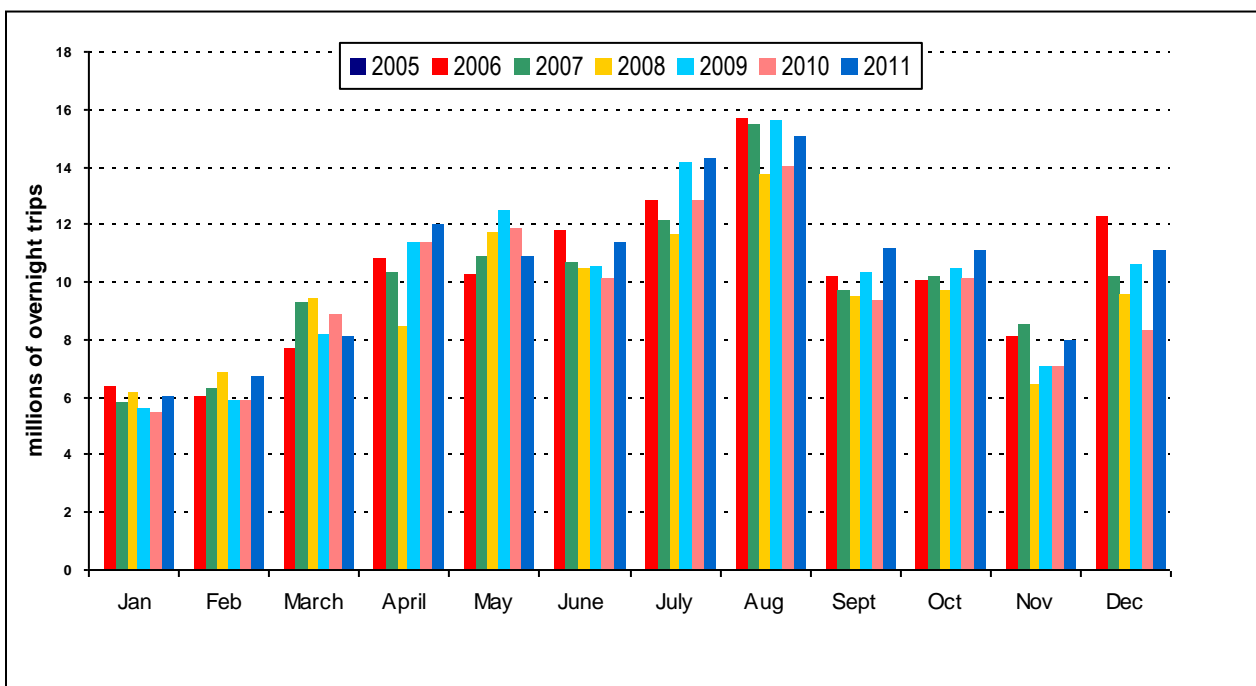
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	54.7	58.4	+7%	197.2	208.5	+6%	11,534	13,000	+13%
Business	16.3	18.6	+14%	37.7	41.8	+11%	3,645	4,400	+21%
VFR	41.6	45.7	+10%	117.4	125.7	+7%	4,193	4,727	+13%
England									
Holiday	43.5	46.2	+6%	151.7	158.0	+4%	9,072	10,031	+11%
Business	13.5	15.5	+15%	29.9	33.7	+13%	2,961	3,538	+20%
VFR	36.0	39.4	+10%	96.5	105.4	+9%	3,478	3,903	+12%

Outbound Travel – UK Residents

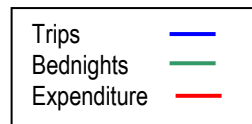
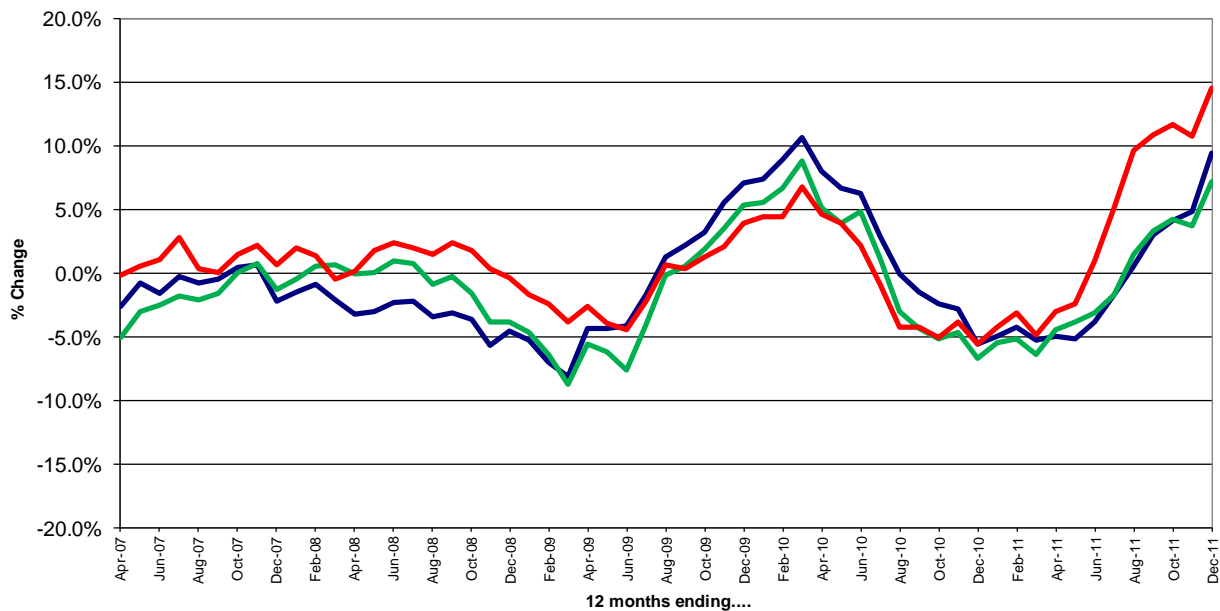
	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	2011	% +/-	2010	2011	% +/-
December	2.7	3.0	+14%	1.5	1.7	+11%
January-December	55.6	56.1	+1%	31.8	31.1	-2%

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 (December 2010 vs December 2011)
- Year to date (January - December 2010 vs January – December 2011)
- 12 month rolling (January 2010 – December 2010 vs January 2011 – December 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

Comparisons with equivalent periods, 2010

LEGEND: Above Average Performance (green), Average Performance (orange), Below Average Performance (red)

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 performance' 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													England												
	Month: December 2011				YTD: January - December 2011				Month: December 2011				YTD: January - December 2011				Month: December 2011				YTD: January - December 2011					
	Trips	Bednights	Expenditure	Unweighted Trips	Trips	Bednights	Expenditure	Unweighted Trips	Trips	Bednights	Expenditure	Unweighted Trips	Trips	Bednights	Expenditure	Unweighted Trips	Trips	Bednights	Expenditure	Unweighted Trips	Trips	Bednights	Expenditure	Unweighted Trips		
TOTAL	34.3%	27.7%	39.1%	1217	9.4%	7.2%	14.5%	17771	9.4%	7.2%	14.5%	17771	33.0%	28.2%	33.4%	1007	9.2%	7.7%	13.1%	14634	9.2%	7.7%	13.1%	14634		
PURPOSE:																										
Pure Holiday	42.1%	34.4%	30.2%	305	6.7%	5.7%	12.7%	8526	6.7%	5.7%	12.7%	8526	28.3%	23.6%	18.6%	243	6.0%	4.1%	10.6%	6735	6.0%	4.1%	10.6%	6735		
- 1-3 nights holiday	47.3%	44.4%	44.8%	223	7.7%	6.8%	10.9%	5184	7.7%	6.8%	10.9%	5184	33.0%	30.9%	32.7%	180	7.8%	7.0%	10.6%	4201	7.8%	7.0%	10.6%	4201		
- 4+ nights holiday	26.5%	25.2%	3.8%	82	5.1%	5.2%	14.6%	3342	5.1%	5.2%	14.6%	3342	13.0%	16.4%	-10.6%	62	2.8%	2.5%	10.5%	2521	2.8%	2.5%	10.5%	2521		
VFR (on holiday)	49.5%	44.8%	49.2%	508	12.5%	9.4%	12.0%	3500	12.5%	9.4%	12.0%	3500	60.5%	54.5%	59.4%	436	14.5%	14.5%	13.7%	2998	14.5%	14.5%	13.7%	2998		
HOLIDAY (TOTAL)	46.3%	41.0%	37.3%	813	8.4%	6.6%	12.6%	12026	8.4%	6.6%	12.6%	12026	45.6%	42.7%	31.9%	676	8.5%	6.8%	11.1%	9733	8.5%	6.8%	11.1%	9733		
VFR (non-holiday)	14.3%	-3.3%	24.1%	308	7.5%	3.9%	13.7%	3107	7.5%	3.9%	13.7%	3107	15.0%	-2.8%	25.7%	268	4.6%	2.7%	10.3%	2692	4.6%	2.7%	10.3%	2692		
VFR (TOTAL)	33.8%	24.6%	39.7%	816	10.0%	7.0%	12.7%	6607	10.0%	7.0%	12.7%	6607	39.3%	29.3%	46.4%	703	9.5%	9.2%	12.2%	5691	9.5%	9.2%	12.2%	5691		
Business	9.3%	22.7%	43.3%	75	13.7%	10.8%	20.7%	2123	13.7%	10.8%	20.7%	2123	-0.9%	19.0%	22.1%	54	15.2%	12.7%	19.5%	1772	15.2%	12.7%	19.5%	1772		
Regions:																										
West Midlands	23.0%	18.5%	-8.9%	107	5.0%	-6.3%	5.4%	1151	5.0%	-6.3%	5.4%	1151	23.0%	18.5%	-8.9%	107	5.0%	-6.3%	5.4%	1151	5.0%	-6.3%	5.4%	1151		
East of England	26.2%	21.3%	37.0%	108	17.0%	12.7%	15.2%	1468	17.0%	12.7%	15.2%	1468	26.2%	21.3%	37.0%	108	17.0%	12.7%	15.2%	1468	17.0%	12.7%	15.2%	1468		
East Midlands	25.9%	17.3%	72.3%	75	17.3%	15.3%	28.6%	1268	17.3%	15.3%	28.6%	1268	25.9%	17.3%	72.3%	75	17.3%	15.3%	28.6%	1268	17.3%	15.3%	28.6%	1268		
London	33.0%	69.6%	16.7%	134	-2.5%	11.3%	-0.7%	1494	-2.5%	11.3%	-0.7%	1494	33.0%	69.6%	16.7%	134	-2.5%	11.3%	-0.7%	1494	-2.5%	11.3%	-0.7%	1494		
North West	27.0%	12.6%	97.3%	113	14.2%	10.0%	18.3%	1960	14.2%	10.0%	18.3%	1960	27.0%	12.6%	97.3%	113	14.2%	10.0%	18.3%	1960	14.2%	10.0%	18.3%	1960		
North East	8.2%	47.9%	39.2%	32	20.9%	18.3%	17.0%	612	20.9%	18.3%	17.0%	612	8.2%	47.9%	39.2%	32	20.9%	18.3%	17.0%	612	20.9%	18.3%	17.0%	612		
South East	54.1%	49.2%	34.8%	190	4.3%	4.2%	17.2%	2356	4.3%	4.2%	17.2%	2356	54.1%	49.2%	34.8%	190	4.3%	4.2%	17.2%	2356	4.3%	4.2%	17.2%	2356		
South West	19.2%	3.7%	21.5%	153	5.5%	2.2%	12.3%	2926	5.5%	2.2%	12.3%	2926	19.2%	3.7%	21.5%	153	5.5%	2.2%	12.3%	2926	5.5%	2.2%	12.3%	2926		
Yorkshire & the Humber	64.8%	34.5%	14.6%	125	16.5%	16.1%	14.9%	1598	16.5%	16.1%	14.9%	1598	64.8%	34.5%	14.6%	125	16.5%	16.1%	14.9%	1598	16.5%	16.1%	14.9%	1598		
LOCATION TYPE:																										
Seaside	46.2%	78.0%	41.7%	113	7.2%	8.3%	12.3%	3810	7.2%	8.3%	12.3%	3810	38.8%	66.9%	13.6%	95	7.1%	7.6%	11.2%	3060	7.1%	7.6%	11.2%	3060		
Large city/ large town	34.8%	29.0%	38.0%	577	10.3%	8.9%	15.4%	6715	10.3%	8.9%	15.4%	6715	31.6%	28.6%	39.2%	482	8.9%	8.6%	13.5%	5761	8.9%	8.6%	13.5%	5761		
Small town	35.1%	23.2%	47.5%	338	9.5%	4.6%	12.6%	4221	9.5%	4.6%	12.6%	4221	36.5%	33.1%	37.9%	269	9.4%	9.2%	13.7%	3365	9.4%	9.2%	13.7%	3365		
Countryside/ village	24.7%	11.3%	30.6%	209	10.7%	5.6%	17.4%	3409	10.7%	5.6%	17.4%	3409	27.8%	4.8%	20.6%	179	12.2%	3.7%	13.8%	2735	12.2%	3.7%	13.8%	2735		
AGE:																										
16-24	7.2%	-2.7%	-4.9%	151	2.7%	-0.3%	14.0%	2123	2.7%	-0.3%	14.0%	2123	7.3%	2.9%	-4.2%	126	1.0%	0.8%	12.6%	1795	1.0%	0.8%	12.6%	1795		
25-34	17.9%	33.3%	19.8%	225	6.1%	11.0%	10.7%	2860	6.1%	11.0%	10.7%	2860	16.2%	30.3%	12.4%	183	4.4%	11.4%	10.7%	2347	4.4%	11.4%	10.7%	2347		
35-44	48.1%	26.4%	58.0%	274	10.4%	3.1%	15.5%	3849	10.4%	3.1%	15.5%	3849	33.3%	25.3%	43.0%	216	10.9%	6.5%	13.3%	3157	10.9%	6.5%	13.3%	3157		
45-54	33.3%	35.2%	40.4%	173	10.6%	10.1%	15.1%	3126	10.6%	10.1%	15.1%	3126	49.2%	42.4%	38.5%	151	13.6%	9.4%	15.6%	2567	13.6%	9.4%	15.6%	2567		
55+	49.7%	43.6%	55.1%	394	12.9%	9.8%	15.3%	5814	12.9%	9.8%	15.3%	5814	49.7%	39.8%	52.8%	332	11.7%	8.7%	12.5%	4768	11.7%	8.7%	12.5%	4768		
SEG:																										
AB	31.1%	25.4%	49.0%	409	10.7%	6.9%	16.9%	5880	10.7%	6.9%	16.9%	5880	27.2%	26.1%	51.1%	333	10.4%	6.1%	13.6%	4896	10.4%	6.1%	13.6%	4896		
C1	31.6%	18.9%	18.0%	403	12.9%	12.4%	17.6%	5615	12.9%	12.4%	17.6%	5615	33.2%	19.6%	8.2%	340	12.3%	14.7%	16.9%	4655	12.3%	14.7%	16.9%	4655		
C2	44.3%	35.5%	49.1%	184	4.9%	3.2%	7.9%	3110	4.9%	3.2%	7.9%	3110	50.4%	37.2%	22.7%	180	7.0%	6.5%	11.4%	2526	7.0%	6.5%	11.4%	2526		
DE	40.5%	55.1%	62.0%	221	3.8%	2.5%	7.6%	3167	3.8%	2.5%	7.6%	3167	31.5%	51.3%	72.5%	186	1.2%	-1.0%	3.1%	2524	1.2%	-1.0%	3.1%	2524		
CHILDREN IN H/H:																										
Any	34.9%	3.4%	44.3%	450	5.1%	0.7%	10.1%	6391	5.1%	0.7%	10.1%	6391	28.8%	-1.3%	27.6%	374	4.5%	1.7%	10.1%	5227	4.5%	1.7%	10.1%	5227		
None	34.0%	39.0%	37.1%	767	11.6%	10.5%	16.3%	11380	11.6%	10.5%	16.3%	11380	35.0%	43.4%	35.9%	634	11.5%	10.6%	14.3%	9401	11.5%	10.6%	14.3%	9401		
ACCOMMODATION:																										
Commercial accom	33.1%	31.4%	41.7%	457	8.6%	7.1%	13.6%	10286	8.6%	7.1%	13.6%	10286	26.2%	29.1%	30.9%	367	7.8%	7.0%	12.0%	8323	7.8%	7.0%	12.0%	8323		
- Serviced accom	44.4%	52.4%	61.6%	395	9.8%	5.7%	13.6%	6858	9.8%	5.7%	13.6%	6858	30.6%	36.2%	43.1%	317	9.3%	5.8%	12.6%	5682	9.3%	5.8%	12.6%	5682		
- Hotel/motel/guesthouse	39.7%	47.6%	58.8%	363	10.9%	7.8%	14.9%	6121	10.9%	7.8%	14.9%	6121	27.8%	34.5%	43.8%	293	10.4%	8.5%	14.2%	5087	10.4%	8.5%	14.2%	5087		
- Bed & Breakfast	119.7%	126.7%	94.1%	29	1.3%	-4.3%	1.7%	677	1.3%	-4.3%	1.7%	677	79.5%	72.2%	44.1%	24	3.0%	-6.6%	0.5%	548	3.0%	-6.6%	0.5%	548		
Total self-catering rented	-20.4%	-20.7%	-38.1%	47	6.1%	7.0%	14.4%	3166	6.1%	7.0%	14.4%	3166	-4.2%	5.0%	-30.5%	36	4.6%	6.8%	11.6%	2427	4.6%	6.8%	11.6%	2427		
- Camping & Caravanning (inc. owned caravans)	-42.8%	-52.6%	-57.7%	11	4.1%	4.9%	11.8%	2380	4.1%	4.9%	11.8%	2380	28.8%	17.0%	0.0%	11	7.1%	8.5%	18.5%	1822	7.1%	8.5%	18.5%	1822		
-Other self-catering rented	-13.9%	-12.8%	-36.2%	36	10.2%	10.9%	18.2%	1281	10.2%	10.9%	18.2%	1281	-18.2%	-0.4%	-36.0%	24	3.7%	7.0%	8.7%	940	3.7%	7.0%	8.7%	940		
Hostels	-58.6%	33.3%	-63.2%	4	-13.7%	-6.5%	-15.9%	176	-13.7%	-6.5%	-15.9%	176	-72.2%	-76.1%	-86.7%	2	-15.8%	-20.6%	-30.3%	135	-15.8%	-20.6%	-30.3%	135		
Own home/friends/relatives'	35.7%	27.2%	34.0%	749	11.5%	7.8%	18.5%	7261	11.5%	7.8%	18.5%	7261	39.7%	29.4%	38.3%	646	11.4%	8.9%	17.2%	6123	11.4%	8.9%	17.2%	6123		

