VisitEngland

GB TOURISM SURVEY - February 2011
SUMMARY OF RESULTS

1. Headlines

- In the month of February, there were 8.0 million domestic tourism trips in Great Britain up from 6.9 million in 2010 – a 15% increase.
- The number of bednights and total expenditure increased by 7% and 13% respectively during the month.
- Reflecting the GB trend, within England, trips rose by 14% from 5.9 million to 6.7 million.
- In England, total nights were up by 12% while spend also increased by 16%.
- Looking at the past 12 months, there were 5 million fewer trips taken in Great Britain compared to the same period the year before.

2. Trip Characteristics

- In the first two months of 2011, there were increases in trip volumes across all trip purposes; business trips were up 18%, visits to friends and family rose by 14% while "pure holiday" trips grew by 10%.
- Reflecting the volume increases, the value of trips also rose across all trip purposes.
- In the longer term though, the trend remains negative – in the 12 months to the end of February 2011, holiday trips declined by 6%, while business and visits to friends and family decreased by 3%.
- There were increases in the number of trips taken by all social-economic groups when compared to the same January-February period in 2010. Although the greatest increase was among ABs with a 20% growth in trips taken, there were also increases amongst the less affluent social grades too; C1s took 9% more trips than they did in the first two months of 2010 while C2s and DEs both took 10% more trips.
- Again though, in the longer-term, although past 12 month trip volumes increased among ABs (+2%) there were declines in all other groups, most steeply among DEs (-15%).

3. Overseas Travel by UK Residents

- In the year to February 2011, UK residents made 5% fewer trips abroad compared to March '09 - February '10, while spend decreased by 1%. Looking specifically at the month of February, outbound travel volumes were unchanged compared with February 2010 while spend decreased by 4% at the same time.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 40% for the month of February (4% higher than in February 2010).
- The quarterly attractions monitor showed that in February 2011 visitor admissions were up by 12%.

KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
February '11									
GB	7.0	8.0	+15%	18.2	19.5	+7%	1,067	1,203	+13%
England	5.9	6.7	+14%	14.1	15.9	+12%	835	969	+16%
Jan-Feb '11									
GB	12.4	14.0	+14%	30.0	34.3	+17	1,793	2,126	+20%
England	10.4	11.8	+14%	23.6	28.5	+21	1,431	1,724	+21%

Purpose of Trip – February 2011

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	2.4	2.7	+15%	6.6	7.3	+10%	460	552	+20%
Business	1.2	1.4	+19%	2.5	2.7	+8%	244	310	+27%
VFR	3.1	3.5	+14%	8.0	8.7	+9%	297	316	+6%
England									
Holiday	1.8	2.2	+21%	5.1	5.6	+11%	344	416	+21%
Business	1.0	1.2	+16%	2.2	2.2	+2%	209	260	+24%
VFR	2.8	3.1	+14%	6.5	7.4	+14%	246	279	+13%

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

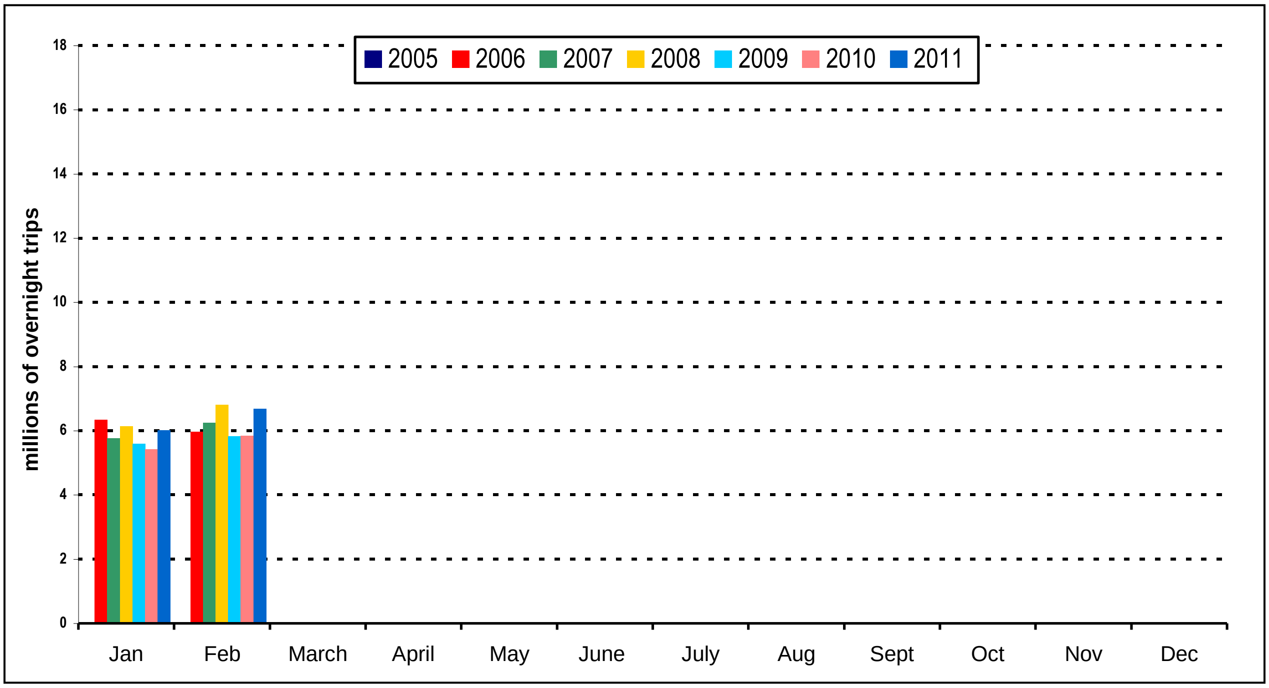
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	4.0	4.4	+10%	10.1	11.2	+11%	765	878	+15%
Business	2.3	2.7	+18%	4.6	5.5	+19%	451	606	+34%
VFR	5.6	6.4	+14%	13.9	14.9	+7%	483	570	+18%
England									
Holiday	3.1	3.6	+16%	7.7	8.7	+14%	586	681	+16%
Business	1.9	2.3	+18%	3.9	4.6	+16%	383	493	+29%
VFR	5.0	5.6	+13%	11.4	12.8	+12%	401	492	+23%

Outbound Travel – UK Residents

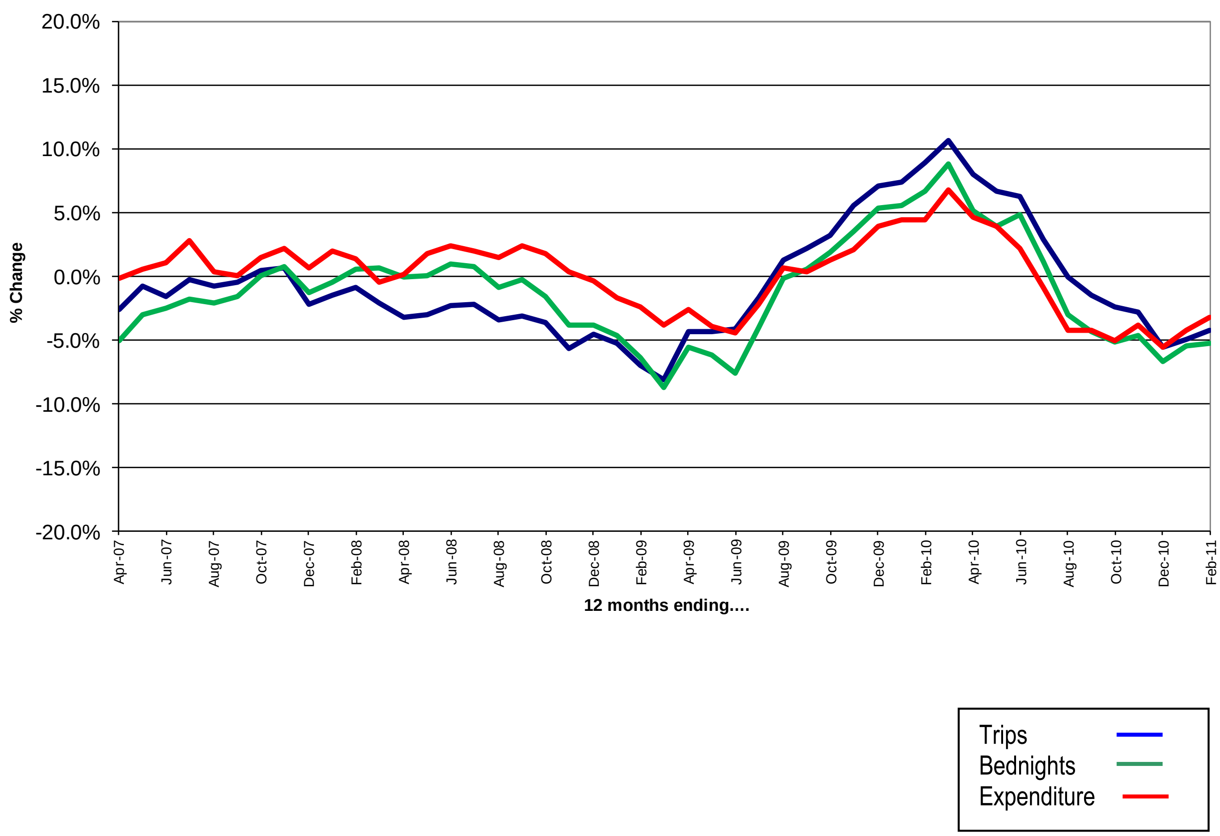
	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	**2011**	**% +/-**	**2010**	**2011**	**% +/-**
February	3.2	3.2	0%	1.9	1.8	-4%
January-February	6.6	6.6	0%	3.8	3.7	-4%
March '10 – Feb '11	57.8	55.0	-5%	31.1	30.8	-1%

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 (February 2010 vs February 2011)
- Year to date (January– February 2010 vs January– February 2011)
- 12 month rolling (March 2009– February 2010 vs March 2010– February 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: February 2011			Unweighted	YTD: January - February 2011			Unweighted	12 month rolling March 2010 - February 2011			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	15.3%	10.7%	15.5%	1082	13.5%	16.6%	20.2%	1933	-4.2%	-5.4%	-3.2%	17089
PURPOSE:												
Pure Holiday	14.7%	9.7%	20.0%	382	9.9%	10.9%	14.8%	616	-6.4%	-8.4%	-4.1%	8332
- 1-3 nights holiday	9.7%	8.0%	20.9%	278	4.9%	3.7%	11.4%	469	-5.7%	-6.0%	0.4%	4979
- 4+ nights holiday	32.0%	11.4%	17.6%	104	31.3%	20.9%	24.9%	147	-7.6%	-9.5%	-8.4%	3353
VFR (on holiday)	-8.2%	-5.7%	-13.7%	227	-0.4%	0.6%	7.8%	436	-8.4%	-8.9%	-1.6%	3243
HOLIDAY (TOTAL)	5.4%	3.3%	10.6%	609	5.6%	6.5%	12.9%	1052	-7.0%	-8.5%	-3.7%	11575
VFR (non-holiday)	39.0%	28.6%	37.1%	276	28.9%	15.4%	32.2%	499	3.9%	6.4%	2.5%	3101
VFR (TOTAL)	14.3%	8.6%	6.4%	503	13.9%	7.3%	18.0%	935	-2.6%	-2.8%	0.1%	6344
Business	19.4%	8.3%	27.0%	165	17.6%	18.5%	34.4%	318	-2.6%	-2.9%	-4.6%	1985
RDAs:												
Adv West Midlands	27.1%	18.2%	39.3%	83	23.3%	22.5%	31.0%	141	0.0%	10.3%	-2.8%	1146
East of England	19.7%	20.4%	-4.1%	100	21.0%	25.2%	-1.7%	171	-12.3%	-7.9%	-6.6%	1329
East Midlands	10.8%	10.9%	68.1%	65	28.9%	36.2%	69.8%	136	3.0%	-0.1%	6.1%	1165
London	-4.3%	33.3%	-3.2%	114	-8.8%	19.3%	1.9%	203	1.9%	3.0%	10.3%	1489
North West	19.8%	11.7%	21.0%	120	33.4%	29.1%	25.1%	217	-4.8%	-5.7%	-2.9%	1822
ONE North East	24.0%	-1.9%	-20.4%	37	4.1%	-8.1%	-21.1%	63	-3.3%	-6.2%	-0.2%	508
South East England	-7.1%	4.5%	13.9%	149	-8.9%	1.8%	7.8%	274	-14.3%	-14.0%	-14.9%	2356
South West	22.0%	-5.4%	27.5%	155	24.0%	14.7%	54.3%	262	-6.5%	-7.8%	-9.2%	2960
Yorkshire Forward	44.1%	54.5%	33.8%	90	28.9%	56.1%	34.7%	168	-1.1%	-6.0%	-1.2%	1518
LOCATION TYPE:												
Seaside	15.6%	1.5%	28.1%	150	14.7%	9.6%	32.5%	232	-10.5%	-12.0%	-10.5%	3743
Large city/ large town	23.9%	24.8%	25.5%	515	16.3%	27.9%	27.3%	914	-2.4%	-2.6%	3.3%	6389
Small town	1.1%	3.3%	0.0%	245	14.1%	16.9%	21.1%	509	-1.3%	2.5%	1.3%	4078
Countryside/ village	8.9%	0.1%	-2.3%	189	-0.1%	-4.5%	-10.4%	299	-7.8%	-8.7%	-12.1%	3214
AGE:												
16-24	4.2%	0.4%	-25.7%	152	8.4%	20.5%	8.0%	287	3.9%	14.7%	0.0%	2093
25-34	17.7%	-6.8%	39.6%	172	16.0%	3.9%	44.6%	301	-8.4%	-15.9%	-9.1%	2684
35-44	14.4%	23.8%	32.0%	231	12.8%	25.8%	30.4%	396	-7.2%	-6.7%	-4.2%	3717
45-54	38.1%	40.1%	27.3%	207	30.9%	37.4%	27.8%	373	4.1%	0.5%	2.6%	3033
55+	6.9%	1.5%	-1.1%	321	4.3%	4.1%	-1.6%	576	-7.5%	-8.7%	-3.9%	5562
SEG:												
AB	14.1%	5.5%	30.5%	395	20.3%	23.2%	40.1%	702	1.5%	-0.2%	4.3%	5498
C1	15.2%	27.3%	6.5%	344	8.5%	15.9%	3.4%	617	-7.4%	-9.1%	-10.0%	5264
C2	24.2%	26.9%	16.7%	170	10.2%	28.6%	12.5%	293	-0.7%	5.0%	4.7%	3097
DE	11.0%	-17.0%	-19.8%	173	9.8%	-7.3%	5.4%	321	-14.8%	-18.0%	-17.5%	3231
CHILDREN IN H/H:												
Any	5.9%	9.8%	20.5%	365	5.0%	16.1%	29.9%	615	-2.0%	-3.7%	1.6%	6232
None	20.1%	11.1%	13.4%	718	17.4%	16.8%	16.7%	1318	-5.3%	-6.2%	-5.0%	10858
ACCOMMODATION:												
Commercial accom	16.5%	15.3%	21.5%	569	14.9%	21.9%	23.4%	987	-1.9%	-3.9%	-1.8%	9961
- Serviced accom	17.4%	11.3%	24.8%	473	14.3%	13.4%	22.9%	833	0.4%	-2.7%	-1.3%	6589
- Hotel/motel/guesthouse	16.3%	11.7%	22.1%	438	15.5%	16.7%	23.2%	779	0.6%	-2.8%	-1.1%	5833
- Bed & Breakfast	24.6%	9.7%	71.4%	31	-0.6%	-22.8%	19.7%	49	0.3%	3.1%	4.0%	692
Total self-catering rented	12.9%	11.0%	14.3%	74	17.4%	22.4%	24.1%	117	-5.4%	-4.0%	-0.6%	3115
-Camping & Caravanning (inc. owned caravans)	24.7%	93.4%	-20.0%	25	36.1%	88.1%	-3.3%	41	-8.3%	-7.0%	-8.3%	2383
-Other self-catering rented	10.2%	-2.6%	24.1%	54	6.7%	8.1%	34.5%	81	-4.2%	-3.5%	2.2%	1211
Hostels	-0.9%	0.9%	-6.3%	14	2.1%	-15.6%	15.6%	26	-2.4%	-12.0%	-13.1%	212
Own home/friends'/relatives'	15.0%	11.1%	2.7%	495	13.2%	12.8%	12.9%	908	-7.8%	-7.0%	-8.7%	6868

Comparisons with equivalent periods, 2010

England

	Month: February 2011			Unweighted	YTD: January - February 2011			Unweighted	12 month rolling March 2010 - February 2011			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	14.1%	12.3%	16.0%	903	13.8%	20.5%	20.5%	1629	-5.0%	-5.8%	-4.2%	14114
PURPOSE:												
Pure Holiday	21.0%	10.9%	20.9%	309	16.3%	14.1%	16.2%	503	-5.9%	-8.5%	-4.6%	6656
- 1-3 nights holiday	14.0%	10.1%	20.6%	225	10.8%	9.0%	12.7%	389	-5.2%	-5.8%	0.1%	4053
- 4+ nights holiday	47.3%	11.9%	21.8%	84	41.9%	21.7%	26.9%	114	-7.2%	-9.9%	-9.4%	2593
VFR (on holiday)	-11.6%	-0.1%	-8.8%	192	-4.0%	7.2%	11.0%	365	-11.3%	-10.4%	-4.3%	2717
HOLIDAY (TOTAL)	6.7%	6.3%	11.8%	501	7.2%	11.0%	14.7%	867	-7.5%	-9.0%	-4.6%	9372
VFR (non-holiday)	40.8%	32.7%	46.5%	251	31.0%	18.4%	38.2%	455	3.9%	5.1%	4.8%	2769
VFR (TOTAL)	13.6%	14.4%	13.4%	445	13.4%	12.4%	22.7%	821	-4.1%	-4.0%	-0.4%	5489
Business	16.0%	1.6%	24.4%	138	17.6%	16.4%	28.7%	267	-5.6%	-5.6%	-7.9%	1635
RDAs:												
Adv West Midlands	27.1%	18.2%	39.3%	83	23.3%	22.5%	31.0%	141	0.0%	10.3%	-2.8%	1146
East of England	19.7%	20.4%	-4.1%	100	21.0%	25.2%	-1.7%	171	-12.3%	-7.9%	-6.6%	1329
East Midlands	10.8%	10.9%	68.1%	65	28.9%	36.2%	69.8%	136	3.0%	-0.1%	6.1%	1165
London	-4.3%	33.3%	-3.2%	114	-8.8%	19.3%	1.9%	203	1.9%	3.0%	10.3%	1489
North West	19.8%	11.7%	21.0%	120	33.4%	29.1%	25.1%	217	-4.8%	-5.7%	-2.9%	1822
ONE North East	24.0%	-1.9%	-20.4%	37	4.1%	-8.1%	-21.1%	63	-3.3%	-6.2%	-0.2%	508
South East England	-7.1%	4.5%	13.9%	149	-8.9%	1.8%	7.8%	274	-14.3%	-14.0%	-14.9%	2356
South West	22.0%	-5.4%	27.5%	155	24.0%	14.7%	54.3%	262	-6.5%	-7.8%	-9.2%	2960
Yorkshire Forward	44.1%	54.5%	33.8%	90	28.9%	56.1%	34.7%	168	-1.1%	-6.0%	-1.2%	1518
LOCATION TYPE:												
Seaside	20.7%	3.5%	33.9%	133	14.4%	4.6%	30.9%	200	-11.7%	-14.3%	-11.1%	3012
Large city/ large town	16.4%	28.5%	18.9%	436	11.5%	30.0%	17.2%	775	-2.9%	-0.3%	2.5%	5525
Small town	3.3%	3.9%	12.7%	201	19.0%	26.6%	39.6%	426	-3.1%	-2.4%	-2.7%	3273
Countryside/ village	10.1%	-3.1%	-4.5%	146	6.5%	-1.5%	-2.8%	243	-8.0%	-6.2%	-11.9%	2559
AGE:												
16-24	-2.5%	4.2%	-24.6%	128	9.3%	30.6%	9.4%	252	6.0%	15.3%	0.1%	1802
25-34	4.1%	-18.8%	28.9%	131	4.1%	-5.3%	35.4%	233	-10.9%	-19.4%	-11.5%	2212
35-44	24.1%	33.6%	33.8%	200	20.4%	35.5%	35.3%	339	-6.9%	-5.3%	-4.2%	3059
45-54	45.0%	46.1%	49.0%	173	35.5%	39.8%	34.3%	317	2.6%	1.9%	1.1%	2438
55+	4.0%	4.0%	-6.3%	272	3.0%	9.7%	-4.4%	488	-8.9%	-9.9%	-5.0%	4606
SEG:												
AB	14.0%	8.6%	27.6%	336	21.6%	29.6%	40.0%	604	0.8%	1.6%	4.2%	4598
C1	15.0%	25.8%	10.0%	293	7.3%	17.2%	5.5%	519	-6.9%	-8.8%	-10.1%	4383
C2	26.2%	36.3%	16.1%	141	15.9%	44.2%	12.3%	245	-4.1%	0.7%	-1.6%	2480
DE	0.3%	-19.4%	-15.6%	129	4.8%	-12.1%	-0.7%	256	-15.9%	-20.0%	-17.7%	2630
CHILDREN IN H/H:												
Any	2.0%	7.5%	17.2%	294	1.1%	12.6%	25.0%	504	-3.2%	-3.0%	0.3%	5107
None	20.2%	14.4%	15.6%	609	19.7%	23.7%	18.8%	1124	-5.9%	-7.1%	-5.9%	9002
ACCOMMODATION:												
Commercial accom	19.1%	20.6%	23.3%	473	16.4%	27.7%	23.6%	818	-2.3%	-4.8%	-2.8%	8122
- Serviced accom	20.5%	15.9%	26.8%	398	15.9%	17.6%	21.7%	698	0.4%	-2.7%	-2.0%	5491
- Hotel/motel/guesthouse	19.1%	15.6%	23.2%	369	17.3%	21.3%	21.6%	651	0.3%	-3.1%	-2.0%	4879
- Bed & Breakfast	26.2%	5.3%	82.6%	26	-1.3%	-24.3%	24.5%	42	1.6%	2.1%	2.6%	551
Total self-catering rented	25.1%	31.4%	20.5%	59	36.7%	51.1%	43.8%	93	-6.4%	-6.3%	-2.8%	2432
-Camping & Caravanning (inc. owned caravans)	91.2%	168.4%	100.0%	24	103.7%	147.4%	92.9%	38	-11.1%	-12.3%	-15.3%	1785
-Other self-catering rented	9.4%	4.4%	13.0%	40	12.6%	25.9%	36.5%	59	-3.1%	-3.5%	3.9%	947
Hostels	-12.0%	-26.3%	-26.7%	12	-13.5%	-47.0%	0.0%	21	7.3%	-4.5%	-3.1%	162
Own home/friends'/relatives'	12.4%	12.3%	2.3%	430	12.6%	15.6%	12.7%	787	-8.7%	-7.1%	-9.4%	5789