

GB TOURISM SURVEY - January 2011 SUMMARY OF RESULTS

1. Headlines

- In the month of January, there were 6.0 million domestic tourism trips in Great Britain up from 5.4 million in 2010 – an 11% increase.
- The number of bednights and total expenditure increased by 16% and 25% respectively during the month.
- Reflecting the GB trend, within England, trips rose by 13% from 4.5 million to 5.1 million.
- In England, total nights were up by 21% while spend also increased by 24%.
- Nevertheless, considering the whole of the past 12 months, trip levels were 4% down 12 months to the end of January 2010, while expenditure was down 2% on the same period.

2. Trip Characteristics

- **Note: Base sizes are low in the month of January, and results should be viewed as indicative only.**
- During January, there were increases across all trip purposes; business trips grew by 16%, visits to friends and family were up by 13% while “pure holiday” trips rose in 3% in Great Britain.
- There were differences by destination type with trips to small town locations up by 30%, while trips to seaside and large town/city locations also increased by 13% and 6% respectively. However, trips to countryside/village locations fell by 13%.
- However, the growth in trip volumes during January may also be weather related. January 2010 saw poor weather across much of the country, leading to travel disruption, while conditions in January 2011 were close to average. It is also possible that some of the uplift at the start of this year was due to trips deferred from December, when travel was again hampered by heavy snow.

3. Overseas Travel by UK Residents

- In the year to January 2011, UK residents made 6% fewer trips abroad compared to February'09 - January '10, while spend was down by 2% during the same period. In the month of January, outbound travel volumes were on a par with January 2010.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 32% for the month of January (5% higher than in January 2010).
- The quarterly attractions monitor showed that in January 2011 visitor admissions were up by 19%.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
January '11									
GB	5.4	6.0	+11%	11.8	13.7	+16%	726	904	+25%
England	4.5	5.1	+13%	9.5	11.5	+21%	596	736	+24%

Purpose of Trip – January 2011

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	1.6	1.7	+3%	3.5	3.9	+13%	304	326	+7%
Business	1.1	1.3	+16%	2.1	2.8	+31%	207	296	+43%
VFR	2.5	2.9	+13%	5.9	6.2	+5%	186	254	+37%
England									
Holiday	1.3	1.4	+10%	2.6	3.1	+20%	241	265	+10%
Business	0.9	1.1	+19%	1.7	2.3	+35%	174	233	+34%
VFR	2.2	2.5	+13%	4.9	5.4	+10%	154	213	+38%

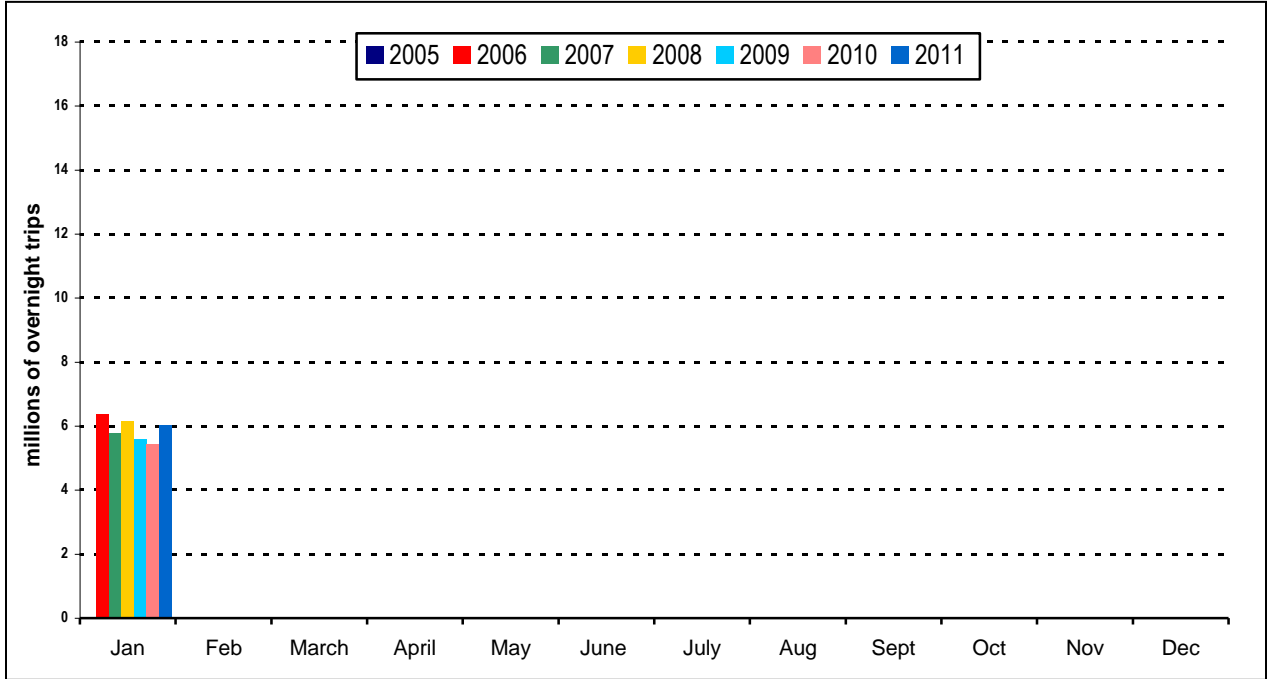
Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	2011	% +/-	2010	2011	% +/-
January 2011	3.4	3.4	0%	2.0	1.9	-3%
Feb '10 – Jan '11	58.1	54.9	-6%	31.4	30.8	-2%

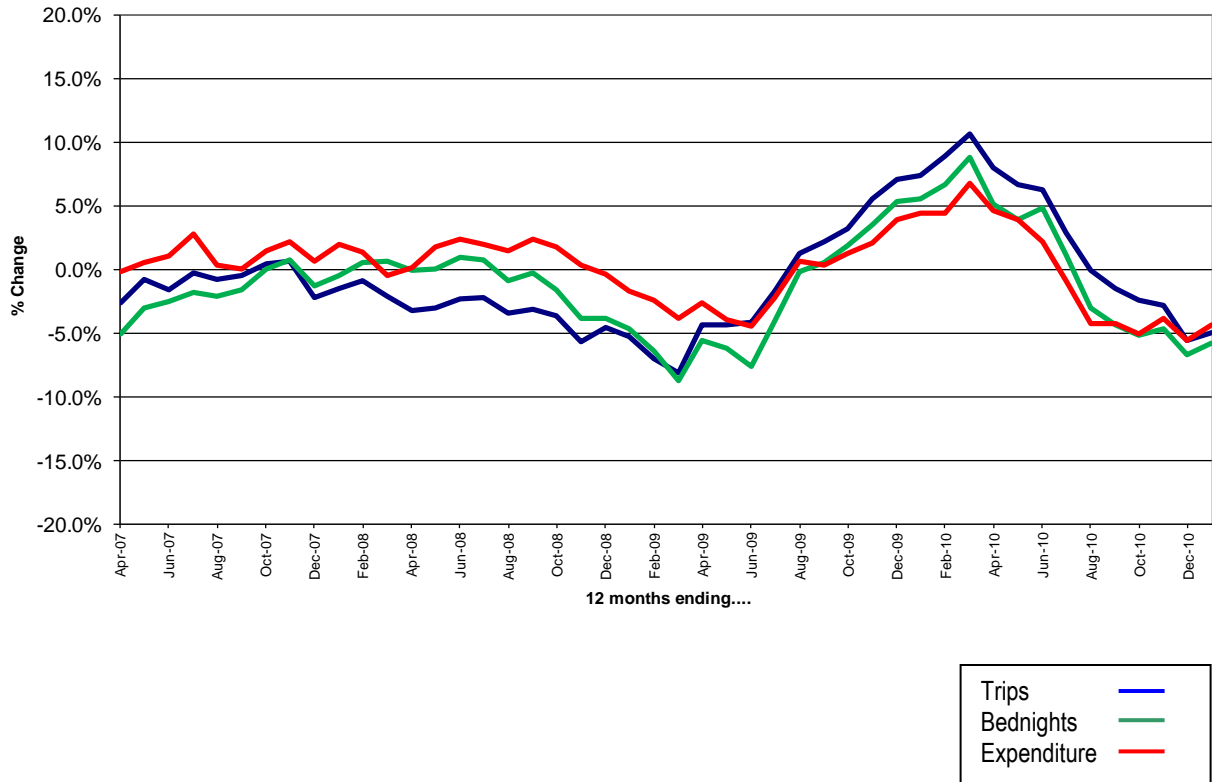
TREND CHARTS



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 (January 2010 vs January 2011)
- Year to date (January– January 2010 vs January– January 2011)
- 12 month rolling (February 2009– January 2010 vs February 2010– January 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, Average Performance, Below Average Performance

NOTE: In the tables below, 'average performance' refers to the total trips/bednights/expenditure to either UK 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.

	Month: January 2011			Unweighted Trips	YTD: January - January 2011			Unweighted Trips	3 month rolling February 2010 - January 2011			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	10.9%	16.3%	24.5%	848	10.9%	16.3%	24.5%	848	-4.1%	-2.9%	-2.1%	17545
PURPOSE:												
Pure Holiday	3.0%	13.4%	7.2%	234	3.0%	13.4%	7.2%	234	-6.1%	-6.1%	-2.8%	8587
- 1-3 nights holiday	-1.4%	-2.5%	-1.7%	191	-1.4%	-2.5%	-1.7%	191	-5.3%	-2.8%	2.1%	5164
- 4+ nights holiday	30.3%	49.5%	39.7%	43	30.3%	49.5%	39.7%	43	-7.4%	-7.7%	-7.4%	3423
VFR (on holiday)	9.8%	10.3%	47.5%	209	9.8%	10.3%	47.5%	209	-6.0%	-3.5%	3.0%	3387
HOLIDAY (TOTAL)	5.9%	11.9%	16.6%	443	5.9%	11.9%	16.6%	443	-6.1%	-5.5%	-1.8%	11974
VFR (non-holiday)	17.0%	0.1%	24.1%	223	17.0%	0.1%	24.1%	223	1.9%	6.3%	0.3%	3092
VFR (TOTAL)	13.4%	5.4%	36.6%	432	13.4%	5.4%	36.6%	432	-2.3%	0.4%	1.8%	6479
Business	15.7%	30.6%	43.0%	153	15.7%	30.6%	43.0%	153	-4.0%	-1.2%	-5.6%	2035
RDAs:												
Adv West Midlands	17.6%	29.5%	20.5%	59	17.6%	29.5%	20.5%	59	-2.8%	8.7%	-7.3%	1147
East of England	22.9%	33.5%	3.1%	71	22.9%	33.5%	3.1%	71	-15.0%	-8.8%	-6.4%	1326
East Midlands	53.4%	76.1%	71.8%	72	53.4%	76.1%	71.8%	72	2.2%	-0.4%	2.3%	1165
London	-14.6%	-19.2%	4.0%	88	-14.6%	-19.2%	4.0%	88	5.0%	1.8%	13.6%	1524
North West	54.6%	59.8%	31.0%	97	54.6%	59.8%	31.0%	97	-4.3%	-4.6%	-2.1%	1845
ONE North East	-19.5%	-17.9%	-25.0%	27	-19.5%	-17.9%	-25.0%	27	-3.4%	-3.5%	8.0%	510
South East England	-11.0%	-1.8%	0.0%	124	-11.0%	-1.8%	0.0%	124	-11.7%	-12.8%	-13.7%	2385
South West	27.1%	63.7%	117.9%	107	27.1%	63.7%	117.9%	107	-7.2%	-7.6%	-9.7%	2955
Yorkshire Forward	11.8%	-1.1%	8.0%	77	11.8%	-1.1%	8.0%	77	-3.1%	-10.4%	-1.5%	1509
LOCATION TYPE:												
Seaside	13.2%	26.8%	42.9%	82	13.2%	26.8%	42.9%	82	-10.5%	-10.4%	-10.0%	3853
Large city/ large town	6.4%	11.4%	24.6%	396	6.4%	11.4%	24.6%	396	-2.7%	0.5%	4.2%	6580
Small town	30.3%	35.4%	53.4%	264	30.3%	35.4%	53.4%	264	-0.4%	5.1%	2.6%	4198
Countryside/ village	-12.6%	-13.1%	-23.0%	110	-12.6%	-13.1%	-23.0%	110	-7.4%	-5.9%	-10.1%	3266
AGE:												
16-24	12.3%	13.9%	54.2%	134	12.3%	13.9%	54.2%	134	4.5%	17.4%	2.4%	2130
25-34	12.6%	0.3%	48.2%	128	12.6%	0.3%	48.2%	128	-8.1%	-14.3%	-10.1%	2758
35-44	10.7%	29.0%	28.4%	164	10.7%	29.0%	28.4%	164	-6.7%	-2.7%	-2.9%	3864
45-54	22.8%	33.7%	28.5%	167	22.8%	33.7%	28.5%	167	2.0%	1.3%	2.2%	3092
55+	1.1%	7.8%	-1.4%	256	1.1%	7.8%	-1.4%	256	-6.6%	-6.1%	-1.1%	5702
SEG:												
AB	29.2%	38.0%	50.9%	306	29.2%	38.0%	50.9%	306	2.7%	3.2%	5.5%	5659
C1	0.4%	-7.0%	-1.9%	271	0.4%	-7.0%	-1.9%	271	-7.9%	-8.6%	-9.6%	5385
C2	-3.9%	30.6%	8.7%	123	-3.9%	30.6%	8.7%	123	-1.4%	7.5%	6.7%	3137
DE	8.2%	9.1%	61.5%	148	8.2%	9.1%	61.5%	148	-14.3%	-13.9%	-15.5%	3364
CHILDREN IN HH:												
Any	3.4%	14.8%	43.1%	249	3.4%	14.8%	43.1%	249	-0.8%	0.1%	2.3%	6443
None	14.0%	16.8%	18.7%	599	14.0%	16.8%	18.7%	599	-5.6%	-4.4%	-3.8%	11103
ACCOMMODATION:												
Commercial accom	12.1%	19.0%	23.4%	416	12.1%	19.0%	23.4%	416	-1.9%	-3.5%	-0.9%	10029
- Serviced accom	10.5%	16.3%	20.7%	360	10.5%	16.3%	20.7%	360	0.2%	-1.1%	-0.4%	6631
- Hotel/motel/guesthouse	14.4%	24.3%	24.9%	340	14.4%	24.3%	24.9%	340	0.9%	-0.6%	0.1%	5876
- Bed & Breakfast	-27.2%	-48.3%	-26.5%	18	-27.2%	-48.3%	-26.5%	18	-3.1%	0.7%	1.6%	695
Total self-catering rented	26.5%	56.2%	52.8%	42	26.5%	56.2%	52.8%	42	-4.6%	-3.7%	0.9%	3143
- Camping & Caravanning (inc. owned caravans)	60.3%	73.8%	14.3%	17	60.3%	73.8%	14.3%	17	-8.0%	-7.1%	-7.0%	2395
- Other self-catering rented	0.3%	39.7%	51.6%	27	0.3%	39.7%	51.6%	27	-2.6%	-2.9%	3.5%	1229
Hostels	6.1%	-27.5%	37.5%	12	6.1%	-27.5%	37.5%	12	-1.2%	-12.6%	-15.8%	215
Own home/friends/relatives	11.2%	15.1%	27.7%	413	11.2%	15.1%	27.7%	413	-7.7%	-6.5%	-7.1%	6885

	Month: January 2011			Unweighted Trips	YTD: January - January 2011			Unweighted Trips	3 month rolling February 2010 - January 2011			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	13.0%	21.3%	23.5%	723	13.0%	21.3%	23.5%	723	-5.1%	-6.0%	-3.7%	14189
PURPOSE:												
Pure Holiday	9.6%	20.3%	10.0%	194	9.6%	20.3%	10.0%	194	-6.1%	-8.2%	-3.7%	6682
- 1-3 nights holiday	6.7%	7.4%	3.6%	164	6.7%	7.4%	3.6%	164	-5.2%	-5.3%	1.2%	4075
- 4+ nights holiday	30.2%	55.4%	38.6%	31	30.2%	55.4%	38.6%	31	-7.7%	-9.7%	-8.6%	2600
VFR (on holiday)	6.1%	17.9%	46.9%	172	6.1%	17.9%	46.9%	172	-8.9%	-8.7%	-0.9%	2772
HOLIDAY (TOTAL)	8.0%	19.2%	19.6%	366	8.0%	19.2%	19.6%	366	-7.0%	-8.3%	-3.2%	9454
VFR (non-holiday)	19.5%	1.6%	27.4%	205	19.5%	1.6%	27.4%	205	1.7%	2.5%	0.8%	2724
VFR (TOTAL)	13.0%	9.8%	38.3%	377	13.0%	9.8%	38.3%	377	-3.8%	-4.0%	-0.2%	5499
Business	19.3%	35.2%	33.9%	129	19.3%	35.2%	33.9%	129	-7.0%	-5.3%	-8.7%	1647
RDAs:												
Adv West Midlands	17.6%	29.5%	20.5%	59	17.6%	29.5%	20.5%	59	-2.8%	8.7%	-7.3%	1147
East of England	22.9%	33.5%	3.1%	71	22.9%	33.5%	3.1%	71	-15.0%	-8.8%	-6.4%	1326
East Midlands	53.4%	76.1%	71.8%	72	53.4%	76.1%	71.8%	72	2.2%	-0.4%	2.3%	1165
London	-14.6%	-19.2%	4.0%	88	-14.6%	-19.2%	4.0%	88	5.0%	1.8%	13.6%	1524
North West	54.6%	59.8%	31.0%	97	54.6%	59.8%	31.0%	97	-4.3%	-4.6%	-2.1%	1845
ONE North East	-19.5%	-17.9%	-25.0%	27	-19.5%	-17.9%	-25.0%	27	-3.4%	-3.5%	8.0%	510
South East England	-11.0%	-1.8%	0.0%	124	-11.0%	-1.8%	0.0%	124	-11.7%	-12.8%	-13.7%	2385
South West	27.1%	63.7%	117.9%	107	27.1%	63.7%	117.9%	107	-7.2%	-7.6%	-9.7%	2955
Yorkshire Forward	11.8%	-1.1%	8.0%	77	11.8%	-1.1%	8.0%	77	-3.1%	-10.4%	-1.5%	1509
LOCATION TYPE:												
Seaside	13.2%	26.8%	42.9%	82	13.2%	26.8%	42.9%	82	-10.5%	-10.4%	-10.0%	3853
Large city/ large town	6.4%	11.4%	24.6%	396	6.4%	11.4%	24.6%	396	-2.7%	0.5%	4.2%	6580
Small town	30.3%	35.4%	53.4%	264	30.3%	35.4%	53.4%	264	-0.4%	5.1%	2.6%	4198
Countryside/ village	-12.6%	-13.1%	-23.0%	110	-12.6%	-13.1%	-23.0%	110	-7.4%	-5.9%	-10.1%	3266
AGE:												
16-24	23.3%	23.8%	54.2%	123	23.3%	23.8%	54.2%	123	7.7%	14.6%	2.6%	1808
25-34	3.2%	-7.7%	40.3%	102	3.2%	-7.7%	40.3%	102	-10.0%	-19.1%	-12.2%	2249
35-44	15.4%	38.7%	37.2%	138	15.4%	38.7%	37.2%	138	-7.5%	-5.8%	-4.5%	3082
45-54	25.6%	31.9%	19.0%	145	25.6%	31.9%	19.0%	145	-0.4%	-0.6%	-0.6%	2418
55+	1.7%	18.3%	-1.1%	217	1.7%	18.3%	-1.1%	217	-8.0%	-8.8%	-2.5%	4640
SEG:												
AB	32.6%	46.5%	53.2%	267	32.6%	46.5%	53.2%	267	1.6%	1.6%	5.2%	4620
C1	-2.3%	-4.5%	-1.9%	224	-2.3%	-4.5%	-1.9%	224	-7.6%	-10.1%	-10.3%	4404
C2	4.9%	54.0%	6.9%	104	4.9%	54.0%	6.9%	104	-5.3%	-0.9%	-1.5%	2466
DE	10.4%	-1.0%	29.8%	128	10.4%	-1.0%	29.8%	128	-15.1%	-17.5%	-16.5%	2677
CHILDREN IN HH:												
Any	-0.4%	6.7%	33.8%	208	-0.4%	6.7%	33.8%	208	-2.4%	-3.0%	-0.5%	5162
None	18.8%	26.9%	20.1%	514	18.8%	26.9%	20.1%	514	-6.3%	-7.4%	-5.0%	9021
ACCOMMODATION:												
Commercial accom	12.4%	21.6%	20.5%	343	12.4%	21.6%	20.5%	343	-2.8%	-5.7%	-2.7%	8148
- Serviced accom	10.2%	20.0%	15.5%	300	10.2%	20.0%	15.5%	300	-0.6%	-2.9%	-2.4%	5499
- Hotel/motel/guesthouse	14.8%	29.9%	19.7%	282	14.8%	29.9%	19.7%	282	-0.2%	-2.9%	-2.0%	4891
- Bed & Breakfast	-26.1%	-44.6%	-22.6%	17	-26.1%	-44.6%	-22.6%	17	-2.4%	-0.4%	-0.9%	550
Total self-catering rented	63.9%	125.3%	131.6%	34	63.9%	125.3%	131.6%	34	-6.0%	-6.7%	-1.3%	2445
- Camping & Caravanning (inc. owned caravans)	142.9%	9										