

## GB TOURISM SURVEY - July 2011 SUMMARY OF RESULTS

### 1. Headlines

- In the month of July, there were 14.2 million domestic tourism trips in Great Britain, an 11% increase from 12.8 million in 2010.
- The number of bednights also rose by 2% during July while expenditure increased by 24% compared to July 2010.
- Reflecting the GB trend, in England, trips grew by 12% from 10.3 million to 11.6 million.
- In England, both total nights and spending rose by 1% and 26% respectively.

### 2. Trip Characteristics

- **Please note: the World Cup continued into July 2010 and this may have affected last year's trip volumes.**
- During the first seven months of 2011, the overall growth in trip volumes reflects increases across all trip purposes; business trips grew by 8% suggesting signs of recovery within this sector, pure holiday trips rose by 4% and visits to friends and relatives by 3% compared to the same period in 2010.
- Expenditure on domestic overnight trips continued to increase more rapidly than trip volumes, the value of trips rose by 13% during the first seven months of the year.
- Between January-July 2011 there were variations by demographic sub-group. The volume of trips taken by households with children fell by 3% while trips taken by households without children rose by 9%.
- At the same time the volume of trips taken by older adults increased more rapidly than the number taken by younger age groups; trips taken by 35-44s, 45-54s and adults aged 55+ increased by 5%, 11% and 7% respectively. Meanwhile, the number of trips taken by 16-24s was unchanged compared to the seven month period in 2010 and trips taken by 25-34 year olds fell by 2%.

### 3. Overseas Travel by UK Residents

- In the first seven months of 2011, UK residents made 2% more trips abroad compared to the same period in 2010, while spend fell by 3%. It should however be noted that outbound travel volumes declined steeply in April 2010 due to disruption caused by the Icelandic ash cloud and this has affected year to date and rolling year totals.

### 4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 59% for the month of July (unchanged from July 2010).
- 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.

## KEY MEASURES

### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
<b>July '11</b>									
GB	12.8	14.2	+11%	51.0	52.2	+2%	2,383	2,945	+24%
England	10.3	11.6	+12%	38.6	39.0	+1%	1,861	2,343	+26%
<b>Jan-Jul '11</b>									
GB	67.1	70.4	+5%	206.1	214.2	+4%	11,170	12,589	+13%
England	55.2	57.9	+5%	161.0	169.5	+5%	8,906	10,034	+13%

### Purpose of Trip – July 2011

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
<b>GB</b>									
Holiday	7.5	8.0	+7%	34.8	34.4	-1%	1,707	1,982	+16%
Business	1.1	1.7	+49%	3.6	3.8	+6%	235	399	+70%
VFR	4.0	4.2	+5%	12.2	12.5	+3%	418	514	+23%
<b>England</b>									
Holiday	5.7	6.3	+10%	25.1	24.9	-1%	1,290	1,587	+23%
Business	1.0	1.4	+44%	3.0	2.8	-6%	195	292	+50%
VFR	3.5	3.6	+3%	10.1	10.1	0%	353	424	+20%

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

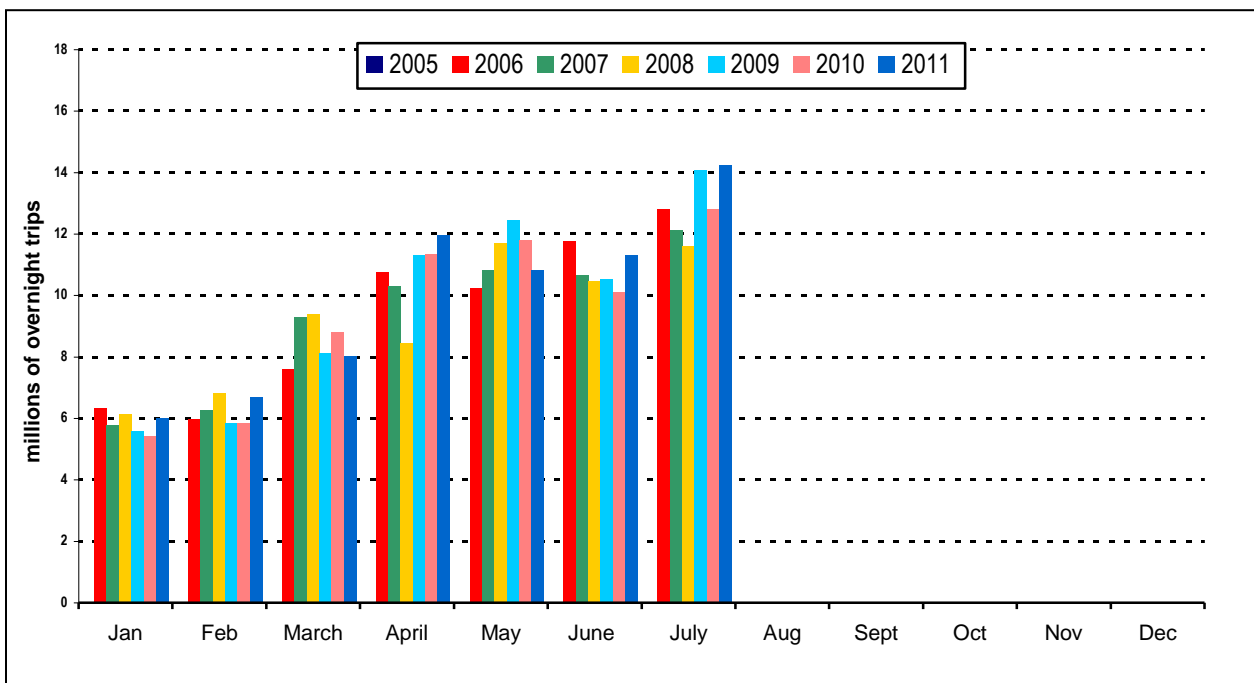
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
<b>GB</b>									
Holiday	32.1	33.5	+4%	114.5	118.4	+3%	6,507	7,390	+14%
Business	9.6	10.4	+8%	22.5	22.7	1%	2,121	2,453	+16%
VFR	23.6	24.2	+3%	63.5	65.2	+3%	2,276	2,453	+8%
<b>England</b>									
Holiday	25.0	26.3	+5%	86.7	89.2	+3%	5,052	5,714	+13%
Business	8.0	8.8	+10%	17.3	18.5	+7%	1,725	2,018	+17%
VFR	20.5	20.9	+2%	53.1	55.0	+4%	1,910	2,060	+8%

### Outbound Travel – UK Residents

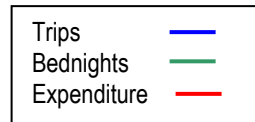
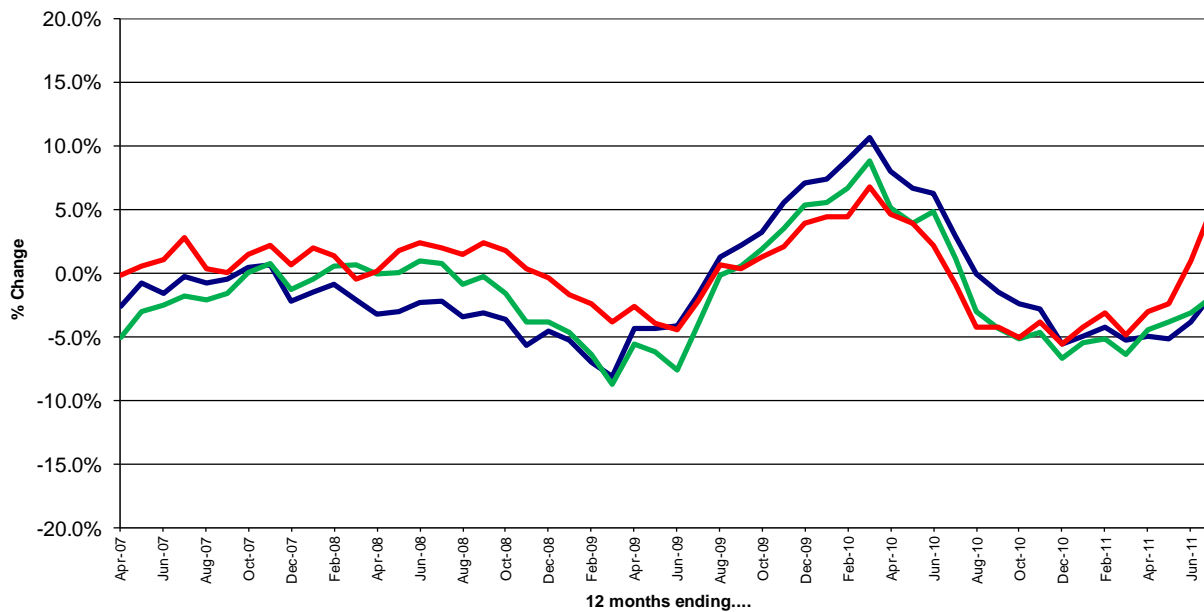
	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	2011	% +/-	2010	2011	% +/-
July	5.9	5.6	-6%	3.4	3.2	-6%
January-July	30.7	31.3	2%	17.7	17.2	-3%
Aug '10 – July '11	56.2	56.2	0%	31.3	31.3	0%

## 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 (July 2010 vs July 2011)
- Year to date (January - July 2010 vs January – July 2011)
- 12 month rolling (August 2009 – July 2010 vs August 2010 – July 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/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											
	Month: July 2011			Unweighted Trips	YTD: January - July 2011			Unweighted Trips	12 month rolling August 2010 - July 2011			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
<b>TOTAL</b>	<b>11.1%</b>	<b>2.4%</b>	<b>23.6%</b>	<b>2084</b>	<b>4.8%</b>	<b>4.0%</b>	<b>12.7%</b>	<b>10183</b>	<b>-1.6%</b>	<b>-2.0%</b>	<b>5.1%</b>	<b>17088</b>
<b>PURPOSE:</b>												
Pure Holiday	6.5%	-1.0%	16.1%	1211	4.4%	3.4%	13.6%	4987	-2.0%	-3.4%	4.8%	8368
- 1-3 nights holiday	13.8%	12.4%	26.2%	643	4.4%	4.0%	10.8%	3075	-1.7%	-2.3%	5.3%	5036
- 4+ nights holiday	-1.4%	-4.9%	10.4%	569	4.5%	3.1%	16.5%	1912	-2.5%	-3.9%	4.3%	3332
VFR (on holiday)	8.7%	14.4%	13.1%	357	1.0%	0.9%	5.8%	1885	-7.8%	-6.5%	2.4%	3228
<b>HOLIDAY (TOTAL)</b>	<b>7.0%</b>	<b>1.6%</b>	<b>15.7%</b>	<b>1568</b>	<b>3.5%</b>	<b>2.8%</b>	<b>12.2%</b>	<b>6873</b>	<b>-3.7%</b>	<b>-4.2%</b>	<b>4.4%</b>	<b>11596</b>
VFR (non-holiday)	0.4%	-13.4%	43.7%	260	4.0%	5.0%	10.7%	1728	1.2%	4.4%	8.6%	3005
VFR (TOTAL)	5.0%	2.9%	23.0%	617	2.5%	2.6%	7.8%	3613	-3.6%	-2.1%	5.0%	6234
Business	49.1%	5.5%	69.8%	199	8.0%	1.0%	15.7%	1255	1.3%	-1.2%	5.7%	2008
<b>RDAs:</b>												
Adv West Midlands	1.2%	-24.3%	-10.0%	132	-1.9%	-7.8%	1.7%	636	-6.3%	-1.3%	-7.0%	1103
East of England	6.8%	-3.4%	9.4%	165	5.7%	3.4%	3.3%	838	-9.4%	-11.9%	-10.2%	1331
East Midlands	26.1%	18.6%	134.4%	138	19.2%	19.7%	38.7%	755	10.6%	8.1%	22.7%	1220
London	-4.0%	-5.3%	25.7%	140	-4.0%	6.5%	2.3%	858	2.5%	6.3%	12.4%	1496
North West	15.4%	6.1%	11.6%	218	5.2%	0.3%	6.4%	1065	-4.1%	-4.6%	1.7%	1796
ONE North East	106.5%	100.3%	111.4%	75	21.6%	30.5%	6.1%	345	8.7%	12.1%	4.7%	566
South East England	18.2%	3.6%	45.0%	289	-4.0%	-3.7%	13.4%	1355	-10.5%	-9.9%	-3.2%	2286
South West	3.0%	2.4%	19.9%	389	9.2%	8.1%	23.5%	1731	1.1%	1.3%	10.1%	2982
Yorkshire Forward	1.7%	-5.3%	-0.5%	156	5.6%	11.2%	12.0%	868	0.2%	4.8%	11.3%	1483
<b>LOCATION TYPE:</b>												
Seaside	7.6%	0.8%	15.2%	560	3.2%	5.9%	16.6%	2212	-3.7%	-1.5%	5.8%	3708
Large city/ large town	26.2%	16.7%	37.7%	679	7.4%	7.2%	12.0%	3791	1.6%	1.0%	8.3%	6481
Small town	3.5%	4.7%	12.7%	481	3.4%	2.0%	9.9%	2422	-2.9%	-2.4%	0.8%	4020
Countryside/ village	5.3%	-2.8%	28.7%	418	5.2%	3.3%	13.7%	1973	-4.4%	-6.2%	2.2%	3255
<b>AGE:</b>												
16-24	15.4%	5.5%	34.4%	261	0.4%	6.4%	22.8%	1243	2.0%	5.8%	17.2%	2110
25-34	10.0%	18.2%	27.2%	329	-1.6%	2.5%	8.0%	1587	-8.4%	-8.2%	-0.1%	2657
35-44	13.4%	-2.7%	19.7%	454	4.5%	0.7%	10.0%	2176	-2.7%	-3.0%	1.0%	3684
45-54	19.4%	23.1%	44.9%	375	11.2%	10.7%	18.2%	1853	4.7%	2.4%	9.5%	3066
55+	3.2%	-5.8%	8.8%	666	7.0%	5.4%	10.7%	3324	-2.3%	-3.5%	4.3%	5573
<b>SEG:</b>												
AB	13.3%	-1.5%	23.3%	663	8.0%	6.2%	18.1%	3467	3.1%	2.5%	11.7%	5591
C1	15.1%	15.3%	24.8%	633	6.1%	9.7%	16.9%	3128	-2.8%	-1.9%	4.5%	5301
C2	0.5%	0.7%	17.0%	383	1.4%	2.8%	1.0%	1803	-1.3%	0.4%	1.6%	3100
DE	12.1%	2.3%	32.2%	404	-1.9%	-4.2%	1.3%	1785	-11.4%	-13.4%	-9.9%	3087
<b>CHILDREN IN H/H:</b>												
Any	5.7%	-3.4%	9.8%	723	-3.0%	-4.9%	2.5%	3511	-4.0%	-5.6%	-0.3%	6088
None	14.0%	8.8%	29.7%	1361	8.8%	9.8%	17.1%	6672	-0.5%	0.2%	7.3%	11000
<b>ACCOMMODATION:</b>												
Commercial accom	13.4%	3.9%	21.7%	1339	4.5%	4.3%	12.6%	5977	0.1%	-1.2%	5.8%	9947
- Serviced accom	24.7%	22.6%	35.2%	769	3.6%	0.7%	10.6%	3894	0.4%	-3.0%	4.9%	6526
- Hotel/motel/guesthouse	31.4%	30.1%	40.6%	680	5.1%	3.1%	12.5%	3478	1.4%	-2.3%	5.8%	5812
- Bed & Breakfast	-3.5%	18.6%	13.1%	82	-8.4%	-12.4%	-7.7%	374	-7.4%	-4.3%	-1.8%	649
Total self-catering rented	2.6%	-4.7%	9.2%	556	6.0%	5.1%	17.1%	1919	-0.4%	-0.4%	4.8%	3163
- Camping & Caravanning (inc. owned caravans)	-5.1%	-11.0%	11.9%	428	6.0%	4.3%	14.4%	1482	-0.8%	-1.0%	4.6%	2424
- Other self-catering rented	12.4%	4.7%	7.8%	193	8.1%	7.8%	22.1%	744	0.5%	4.1%	11.6%	1245
Hostels	-15.9%	19.6%	5.9%	11	-13.0%	-13.4%	-11.6%	111	-7.6%	-12.0%	-15.3%	192
Own home/friends'/relatives'	4.2%	-1.6%	18.0%	728	5.8%	5.5%	13.3%	4073	-4.6%	-2.5%	0.6%	6886

	England											
	Month: July 2011			Unweighted Trips	YTD: January - July 2011			Unweighted Trips	12 month rolling August 2010 - July 2011			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
<b>TOTAL</b>	<b>12.0%</b>	<b>0.9%</b>	<b>25.9%</b>	<b>1694</b>	<b>5.0%</b>	<b>5.2%</b>	<b>12.7%</b>	<b>8381</b>	<b>-1.7%</b>	<b>-1.1%</b>	<b>4.9%</b>	<b>14118</b>
<b>PURPOSE:</b>												
Pure Holiday	10.0%	-0.7%	23.0%	952	4.9%	2.9%	13.1%	3912	-0.8%	-2.9%	5.0%	6669
- 1-3 nights holiday	19.1%	15.9%	35.6%	529	5.5%	5.2%	11.7%	2468	-0.4%	-1.4%	6.3%	4103
- 4+ nights holiday	-0.6%	-6.1%	15.2%	421	3.6%	1.5%	14.7%	1438	-1.4%	-3.8%	3.7%	2555
VFR (on holiday)	8.7%	7.4%	17.7%	313	2.2%	2.6%	9.1%	1629	-8.8%	-7.7%	2.4%	2737
<b>HOLIDAY (TOTAL)</b>	<b>9.7%</b>	<b>0.9%</b>	<b>22.1%</b>	<b>1266</b>	<b>4.1%</b>	<b>2.8%</b>	<b>12.4%</b>	<b>5540</b>	<b>-3.2%</b>	<b>-4.2%</b>	<b>4.6%</b>	<b>9404</b>
VFR (non-holiday)	-4.0%	-12.0%	25.0%	215	1.8%	4.9%	6.3%	1499	-0.5%	3.2%	6.0%	2643
VFR (TOTAL)	3.1%	-0.2%	20.1%	528	2.0%	3.6%	7.9%	3128	-4.8%	-3.1%	3.9%	5382
Business	44.3%	-6.3%	49.7%	165	10.3%	7.2%	17.0%	1067	1.1%	5.1%	5.6%	1675
<b>RDAs:</b>												
Adv West Midlands	1.2%	-24.3%	-10.0%	132	-1.9%	-7.8%	1.7%	636	-6.3%	-1.3%	-7.0%	1103
East of England	6.8%	-3.4%	9.4%	165	5.7%	3.4%	3.3%	838	-9.4%	-11.9%	-10.2%	1331
East Midlands	26.1%	18.6%	134.4%	138	19.2%	19.7%	38.7%	755	10.6%	8.1%	22.7%	1220
London	-4.0%	-5.3%	25.7%	140	-4.0%	6.5%	2.3%	858	2.5%	6.3%	12.4%	1496
North West	15.4%	6.1%	11.6%	218	5.2%	0.3%	6.4%	1065	-4.1%	-4.6%	1.7%	1796
ONE North East	106.5%	100.3%	111.4%	75	21.6%	30.5%	6.1%	345	8.7%	12.1%	4.7%	566
South East England	18.2%	3.6%	45.0%	289	-4.0%	-3.7%	13.4%	1355	-10.5%	-9.9%	-3.2%	2286
South West	3.0%	2.4%	19.9%	389	9.2%	8.1%	23.5%	1731	1.1%	1.3%	10.1%	2982
Yorkshire Forward	1.7%	-5.3%	-0.5%	156	5.6%	11.2%	12.0%	868	0.2%	4.8%	11.3%	1483
<b>LOCATION TYPE:</b>												
Seaside	5.0%	-1.2%	13.9%	422	2.8%	4.9%	15.7%	1761	-4.6%	-3.7%	4.4%	2975
Large city/ large town	22.2%	12.2%	33.8%	581	5.8%	8.4%	9.2%	3263	0.7%	3.4%	6.4%	5589
Small town	7.4%	7.8%	22.6%	385	4.3%	5.6%	15.0%	1941	-3.2%	-1.8%	2.2%	3226
Countryside/ village	9.9%	-4.1%	35.9%	342	8.1%	2.9%	14.9%	1582	-2.1%	-4.1%	4.8%	2617
<b>AGE:</b>												
16-24	20.4%	-1.7%	54.8%	226	0.4%	3.9%	24.9%	1065	3.1%	4.6%	19.0%	1815
25-34	9.2%	26.7%	28.4%	270	-5.9%	0.5%	5.2%	1273	-11.8%	-10.6%	-3.5%	2160
35-44	16.4%	-2.2%	17.6%	358	8.0%	7.1%	10.4%	1796	0.5%	2.8%	2.1%	3064
45-54	20.0%	19.3%	42.9%	301	15.4%	13.1%	23.2%	1532	6.0%	5.0%	12.2%	2505
55+	2.0%	-6.9%	12.6%	543	5.1%	4.5%	7.4%	2709	-4.1%	-4.2%	2.2%	4571
<b>SEG:</b>												
AB	10.6%	-2.1%	19.8%	536	8.6%	7.2%	15.1%	2905	3.5%	4.6%	10.2%	4682
C1	23.1%	26.4%	35.7%	538	5.5%	12.1%	19.1%	2589	-2.6%	1.5%	6.2%	4406
C2	-0.8%	-13.3%	22.1%	293	4.0%	5.7%	5.8%	1452	-1.6%	-1.5%	1.5%	2504
DE	9.3%	-2.8%	25.8%	323	-4.5%	-8.3%	-3.1%	1412	-13.1%	-16.3%	-11.6%	2494
<b>CHILDREN IN H/H:</b>												
Any	10.1%	0.1%	15.8%	562	-3.6%	-2.4%	4.1%	2847	-4.3%	-2.8%	0.5%	4988
None	13.0%	4.8%	30.2%	1129	9.3%	9.8%	16.3%	5528	-0.5%	-0.3%	6.7%	9123
<b>ACCOMMODATION:</b>												
Commercial accom	12.3%	3.9%	23.4%	1068	4.4%	5.1%	12.3%	4824	0.2%	0.1%	5.7%	8090
- Serviced accom	23.4%	25.1%	36.9%	638	4.1%	2.5%	11.7%	3229	0.9%	-0.5%	5.6%	5440
- Hotel/motel/guesthouse	30.1%	28.5%	39.7%	567	5.6%	5.5%	13.9%	2895	1.6%	0.3%	6.4%	4864
- Bed & Breakfast	-3.0%	49.0%	28.6%	67	-7.0%	-13.7%	-8.4%	302	-4.9%	-4.1%	-1.3%	521
Total self-catering rented	0.3%	-6.3%	10.9%	418	5.1%							

