

## GB TOURISM SURVEY - June 2011 SUMMARY OF RESULTS

### 1. Headlines

- In the month of June, there were 11.3 million domestic tourism trips in Great Britain, a 12% increase from 10.1 million in 2010.
- The number of bednights also rose by 5% during June while expenditure increased by 22% compared to June 2010.
- Reflecting the GB trend, in England, trips increased by 12% from 8.2 million to 9.2 million.
- In England, both total nights and spending both rose by 6% and 19% respectively.

### 2. Trip Characteristics

- **Please note: in June 2010 the World Cup took place and this may have affected last year's trip volumes.**
- The overall growth in trip volumes during the first half of 2011 was driven by increases across all trip types; pure holiday trips rose by 4%, visits to friends and relatives by 2% and business trips by 3%. Longer 4+ night holiday trips (+7%) outperformed shorter 1-3 night holidays (+ 2%).
- Expenditure on travel is increasing at a faster rate than trip volumes, with spend in the first six months of the year 10% higher than the same period last year, reflecting the impact of inflation on travel costs.
- There were differences in performance by accommodation type, trips involving a stay in serviced accommodation decreased slightly (-1%) and within this there was a 10% fall in trips to bed and breakfast establishments. At the same time, there was a 7% increase in trips including a stay in self-catering accommodation, and within this an 11% increase in camping and caravanning trips.
- During the first half of the year, there were also variations by social grade. The more affluent AB social grade took 7% more trips in January-June 2011 than they did in the first six months of 2010. The number of trips taken by C1s and C2s also increased by 4% and 2% respectively while DEs took 5% fewer trips than they did in the same period in 2010.

### 3. Overseas Travel by UK Residents

- In the first six months of 2011, UK residents made 4% more trips abroad compared to the same period in 2010, while spend fell by 2%. 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 55% for the month of June (2% higher than in June 2010).
- The Q2 England Attractions Monitor showed that visits to visitor attractions rose by 1% in the month of June compared to June 2010.

## KEY MEASURES



### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
<b>June '11</b>									
GB	10.1	11.3	+12%	33.4	35.1	+5%	1,789	2,184	+22%
England	8.2	9.2	+12%	26.1	27.5	+6%	1,398	1,658	+19%
<b>Jan-Jun '11</b>									
GB	54.3	56.1	+3%	155.1	161.0	+4%	8,788	9,636	+10%
England	44.8	46.4	+3%	122.4	129.5	+6%	7,045	7,683	+9%

### Purpose of Trip – June 2011

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
<b>GB</b>									
Holiday	5.6	5.8	+5%	20.7	21.6	+4%	1,166	1,360	+16%
Business	1.3	1.7	+29%	3.7	3.7	+1%	270	446	+65%
VFR	2.8	3.4	+19%	7.9	8.8	+12%	323	337	+4%
<b>England</b>									
Holiday	4.3	4.5	+4%	16.1	16.3	+1%	900	992	+10%
Business	1.0	1.4	+33%	2.0	2.9	+44%	198	353	+78%
VFR	2.5	2.9	+17%	7.0	7.5	+8%	272	278	+2%

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

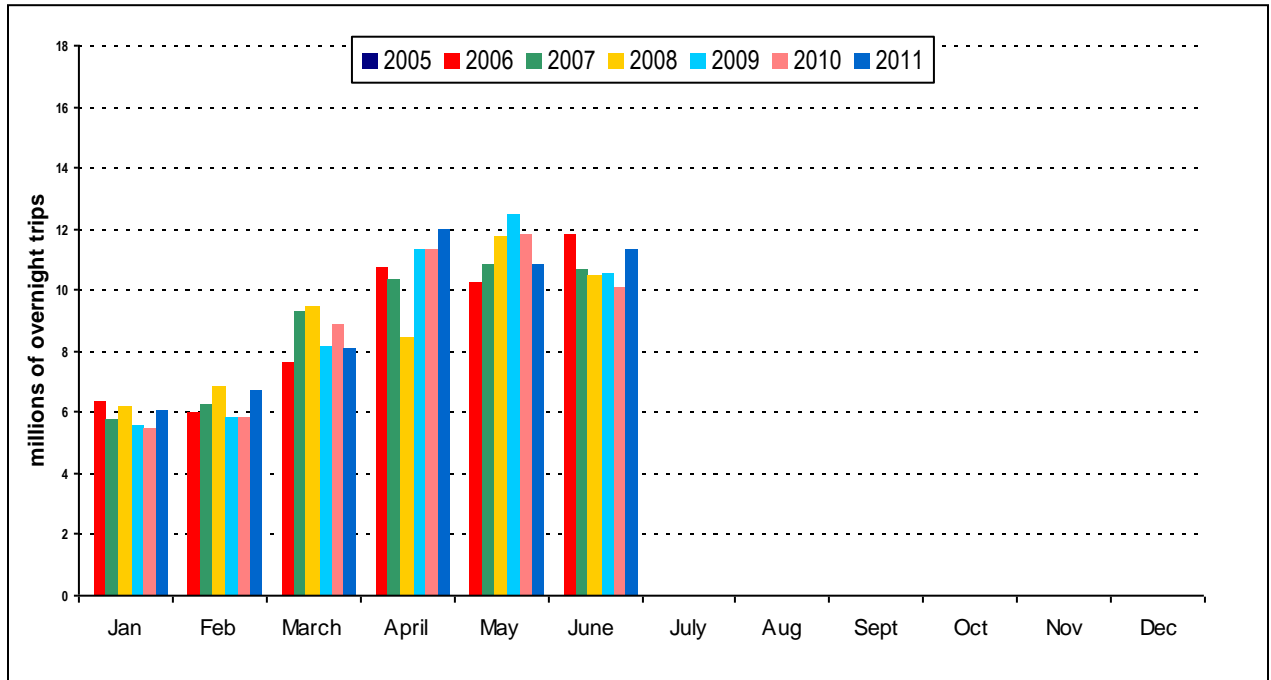
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
<b>GB</b>									
Holiday	24.6	25.5	+4%	79.7	83.5	+5%	4,800	5,402	+13%
Business	8.5	8.7	+3%	18.9	19.0	0%	1,887	2,054	+9%
VFR	19.6	20.0	+2%	51.4	52.1	+2%	1,859	1,938	+4%
<b>England</b>									
Holiday	19.3	20.0	+3%	61.6	63.8	+4%	3,762	4,121	+10%
Business	7.0	7.4	+6%	14.3	15.7	+10%	1,530	1,725	+13%
VFR	17.0	17.3	+2%	43.0	44.3	+3%	1,557	1,635	+5%

### Outbound Travel – UK Residents

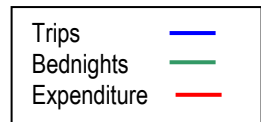
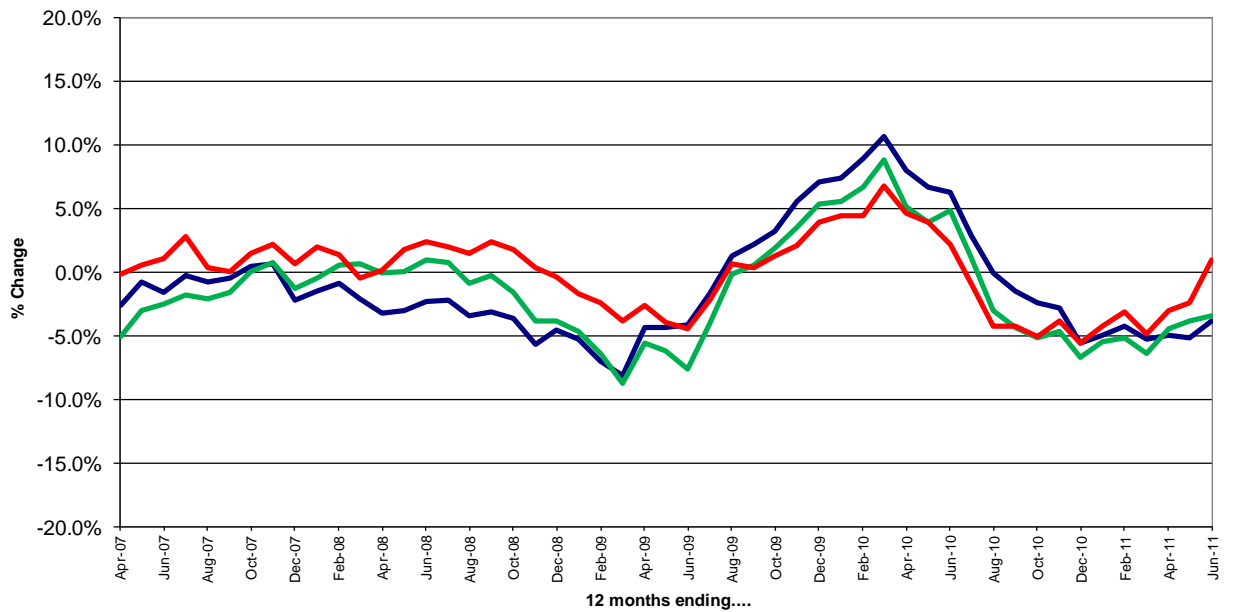
	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	2011	% +/-	2010	2011	% +/-
June	5.6	5.6	-1%	3.1	3.0	-4%
January-June	24.8	25.7	4%	14.3	13.9	-2%
July '10 – June '11	56.1	56.4	1%	31.2	31.5	1%

## 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 (June 2010 vs June 2011)
- Year to date (January - June 2010 vs January – June 2011)
- 12 month rolling (July 2009 – June 2010 vs July 2010 – June 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 (Yellow), Average Performance (Green), Below Average Performance (Red)

NOTE: In the tables below, 'average performance' refers to the total trips/rights/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.

## Comparisons with equivalent periods, 2010

	Great Britain											
	Month: June 2011			Unweighted Trips	YTD: January - June 2011			Unweighted Trips	12 month rolling July 2010 - June 2011			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
<b>TOTAL</b>	11.9%	4.9%	22.1%	1639	3.3%	3.8%	9.6%	8097	-3.9%	-3.5%	1.0%	16972
<b>PURPOSE:</b>												
Pure Holiday	5.0%	4.3%	16.6%	868	3.8%	4.8%	12.5%	3774	-4.4%	-4.7%	1.5%	8333
- 1-3 nights holiday	7.0%	10.3%	22.6%	516	2.2%	2.0%	7.3%	2433	-4.9%	-5.1%	2.4%	4975
- 4+ nights holiday	1.9%	1.5%	11.5%	352	7.0%	7.5%	19.4%	1342	-3.6%	-4.4%	0.6%	3358
VFR (on holiday)	17.8%	6.2%	14.1%	270	-0.8%	-4.2%	3.5%	1527	-8.3%	-10.2%	0.8%	3206
<b>HOLIDAY (TOTAL)</b>	7.8%	4.7%	16.3%	1138	2.4%	2.3%	10.9%	5302	-5.5%	-6.1%	1.4%	11539
VFR (non-holiday)	19.9%	19.8%	-7.5%	232	4.7%	9.2%	5.1%	1467	1.5%	8.0%	2.9%	3032
<b>VFR (TOTAL)</b>	18.7%	11.9%	4.3%	502	1.9%	1.5%	4.2%	2995	-3.7%	-2.9%	1.7%	6237
Business	28.6%	0.6%	65.2%	205	2.5%	0.2%	8.9%	1056	-4.2%	-2.1%	-1.3%	1951
<b>RDAS:</b>												
Adv West Midlands	5.3%	-16.2%	-6.9%	100	-2.7%	-2.3%	4.7%	504	-4.2%	7.4%	-3.9%	1095
East of England	3.0%	-11.2%	-4.9%	134	5.2%	1.0%	1.2%	671	-10.9%	-7.5%	-9.2%	1326
East Midlands	17.3%	36.0%	2.7%	123	17.7%	19.9%	20.1%	617	4.8%	2.1%	7.4%	1202
London	25.3%	7.0%	28.6%	134	-4.0%	9.1%	-1.4%	718	4.3%	9.5%	10.9%	1490
North West	11.0%	-9.6%	21.7%	154	3.0%	-1.2%	5.0%	847	-7.0%	-7.5%	-0.9%	1779
ONE North East	21.9%	77.0%	7.7%	45	8.5%	17.1%	-9.6%	270	-2.1%	0.2%	-8.0%	535
South East England	-3.4%	1.0%	18.0%	214	-8.6%	-5.7%	5.9%	1066	-14.6%	-12.3%	-9.9%	2258
South West	16.3%	0.4%	32.1%	305	11.0%	9.0%	24.5%	1341	-0.6%	-1.9%	3.0%	2986
Yorkshire Forward	29.6%	44.8%	30.3%	144	6.5%	16.0%	15.9%	712	-1.3%	0.7%	10.7%	1497
<b>LOCATION TYPE:</b>												
Seaside	14.6%	16.8%	30.3%	431	1.6%	5.5%	16.7%	1650	-8.0%	-5.4%	-0.6%	3691
Large city/ large town	22.7%	10.0%	43.1%	554	4.0%	5.3%	7.4%	3112	-1.9%	-1.5%	3.5%	6363
Small town	-3.8%	-3.9%	-3.1%	355	3.4%	2.3%	9.1%	1941	-2.9%	-3.6%	0.8%	4013
Countryside/ village	16.8%	12.4%	14.7%	340	5.2%	5.5%	9.2%	1555	-5.1%	-3.9%	-2.3%	3268
<b>AGE:</b>												
16-24	14.7%	3.6%	25.0%	184	-2.9%	5.7%	19.2%	980	0.7%	8.6%	11.1%	2067
25-34	-1.2%	-3.5%	5.8%	244	-4.3%	-2.0%	3.2%	1259	-11.0%	-12.5%	-6.0%	2621
35-44	11.7%	14.5%	31.8%	357	2.4%	2.0%	7.4%	1723	-7.0%	-5.2%	-4.2%	3673
45-54	11.5%	2.6%	22.4%	300	9.4%	6.8%	11.6%	1479	2.2%	-2.4%	4.9%	3018
55+	20.0%	16.6%	23.9%	555	7.9%	8.1%	10.9%	2656	-2.6%	-2.8%	3.1%	5594
<b>SEG:</b>												
AB	21.3%	18.2%	49.2%	575	6.8%	8.7%	16.7%	2804	0.4%	2.0%	7.3%	5553
C1	5.0%	1.4%	15.8%	490	4.0%	8.1%	14.6%	2495	-4.9%	-5.7%	0.8%	5239
C2	17.4%	22.2%	18.2%	297	1.7%	5.0%	-3.6%	1420	-1.7%	4.1%	-0.1%	3118
DE	-0.5%	-5.0%	-24.9%	276	-5.4%	-10.3%	-7.8%	1378	-14.4%	-17.6%	-17.1%	3063
<b>CHILDREN IN HH:</b>												
Any	6.6%	2.1%	6.4%	564	-5.0%	-5.4%	0.4%	2788	-6.1%	-5.9%	-2.5%	6072
None	14.7%	12.5%	29.3%	1075	7.5%	9.5%	13.7%	5309	-2.8%	-2.3%	2.4%	10901
<b>ACCOMMODATION:</b>												
Commercial accom	5.9%	7.8%	27.9%	1015	2.1%	4.0%	9.9%	4639	-2.6%	-2.9%	2.2%	9844
- Serviced accom	3.3%	2.6%	25.6%	586	-0.5%	-4.1%	5.7%	3124	-2.5%	-6.3%	0.5%	6411
- Hotel/motel/guesthouse	5.3%	4.0%	26.8%	517	0.2%	-2.4%	7.1%	2798	-1.9%	-6.2%	1.2%	5683
- Bed & Breakfast	-5.5%	-9.1%	0.0%	68	-9.6%	-19.9%	-12.7%	293	-9.8%	-8.8%	-8.0%	656
Total self-catering rented	21.3%	18.6%	38.6%	424	7.3%	9.4%	21.0%	1364	-2.8%	-0.6%	6.8%	3165
- Camping & Caravanning (inc. owned caravans)	23.3%	17.5%	29.2%	348	11.0%	12.2%	15.1%	1065	-3.4%	-1.3%	-1.6%	2458
- Other self-catering rented	19.9%	29.1%	51.3%	137	6.6%	9.2%	29.0%	581	-1.5%	0.8%	12.7%	1230
Hostels	-80.1%	-82.1%	-60.9%	7	-12.6%	-17.4%	-14.0%	100	-8.9%	-14.0%	-15.0%	196
Own home/friends'/relatives'	24.5%	15.2%	14.9%	596	6.1%	7.2%	12.1%	3342	-5.5%	-3.5%	-3.0%	6893

	England											
	Month: June 2011			Unweighted Trips	YTD: January - June 2011			Unweighted Trips	12 month rolling July 2010 - June 2011			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
<b>TOTAL</b>	12.3%	5.6%	18.6%	1330	3.4%	5.8%	9.1%	6685	-4.1%	-2.7%	0.3%	14013
<b>PURPOSE:</b>												
Pure Holiday	3.7%	0.8%	10.2%	668	3.3%	3.6%	9.5%	2958	-4.1%	-5.2%	0.2%	6613
- 1-3 nights holiday	9.0%	14.0%	26.2%	404	2.4%	2.7%	6.4%	1939	-4.1%	-4.4%	2.5%	4032
- 4+ nights holiday	-4.2%	-5.1%	-3.1%	263	5.1%	4.2%	13.9%	1016	-4.1%	-5.5%	-2.1%	2571
VFR (on holiday)	21.2%	5.0%	22.5%	236	0.5%	-1.0%	6.4%	1316	-9.0%	-10.2%	0.7%	2717
<b>HOLIDAY (TOTAL)</b>	7.8%	1.7%	11.6%	904	2.4%	2.3%	9.0%	4272	-5.6%	-6.5%	0.3%	9329
VFR (non-holiday)	11.6%	10.8%	-17.3%	197	2.9%	8.5%	3.2%	1283	-0.1%	6.0%	3.0%	2676
<b>VFR (TOTAL)</b>	16.7%	7.6%	2.2%	433	1.7%	3.1%	5.0%	2600	-4.7%	-3.4%	1.7%	5394
Business	33.0%	44.0%	78.3%	170	5.6%	10.1%	12.7%	901	-4.3%	5.7%	-0.3%	1632
<b>RDAS:</b>												
Adv West Midlands	5.3%	-16.2%	-6.9%	100	-2.7%	-2.3%	4.7%	504	-4.2%	7.4%	-3.9%	1095
East of England	3.0%	-11.2%	-4.9%	134	5.2%	1.0%	1.2%	671	-10.9%	-7.5%	-9.2%	1326
East Midlands	17.3%	36.0%	2.7%	123	17.7%	19.9%	20.1%	617	4.8%	2.1%	7.4%	1202
London	25.3%	7.0%	28.6%	134	-4.0%	9.1%	-1.4%	718	4.3%	9.5%	10.9%	1490
North West	11.0%	-9.6%	21.7%	154	3.0%	-1.2%	5.0%	847	-7.0%	-7.5%	-0.9%	1779
ONE North East	21.9%	77.0%	7.7%	45	8.5%	17.1%	-9.6%	270	-2.1%	0.2%	-8.0%	535
South East England	-3.4%	1.0%	18.0%	214	-8.6%	-5.7%	5.9%	1066	-14.6%	-12.3%	-9.9%	2258
South West	16.3%	0.4%	32.1%	305	11.0%	9.0%	24.5%	1341	-0.6%	-1.9%	3.0%	2986
Yorkshire Forward	29.6%	44.8%	30.3%	144	6.5%	16.0%	15.9%	712	-1.3%	0.7%	10.7%	1497
<b>LOCATION TYPE:</b>												
Seaside	16.6%	16.7%	29.4%	346	1.9%	4.0%	15.8%	1337	-8.5%	-7.9%	-1.5%	2973
Large city/ large town	15.9%	0.9%	30.0%	462	2.8%	7.5%	4.7%	2681	-2.5%	1.4%	2.1%	5503
Small town	-7.4%	-5.4%	-8.7%	278	3.7%	6.4%	13.0%	1555	-4.3%	-4.3%	-0.7%	3207
Countryside/ village	31.7%	14.8%	17.2%	277	7.7%	5.3%	8.5%	1239	-3.2%	-0.6%	-0.4%	2614
<b>AGE:</b>												
16-24	16.6%	-1.2%	32.5%	164	-3.9%	4.3%	17.2%	838	1.7%	9.9%	12.0%	1770
25-34	-10.7%	-20.9%	-7.1%	183	-9.2%	-6.0%	-0.3%	1004	-14.8%	-17.0%	-9.6%	2132
35-44	15.7%	29.7%	30.6%	300	6.1%	10.5%	8.3%	1439	-4.8%	-0.3%	-3.5%	3049
45-54	15.1%	2.4%	24.9%	242	14.3%	11.3%	18.2%	1232	3.9%	1.5%	7.7%	2465
55+	20.9%	11.9%	14.0%	439	5.8%	7.0%	5.6%	2165	-4.4%	-4.0%	0.3%	4594
<b>SEG:</b>												
AB	19.2%	16.4%	34.4%	451	8.1%	10.2%	13.9%	2368	0.7%	4.1%	6.1%	4664
C1	4.2%	-1.4%	18.7%	404	1.7%	8.2%	14.4%	2051	-5.4%	-3.9%	1.5%	4323
C2	27.8%	27.9%	24.5%	255	5.4%	14.8%	1.3%	1159	-2.3%	4.3%	-2.3%	2523
DE	-1.4%	-12.4%	-28.6%	222	-8.1%	-14.9%	-12.0%	1086	-15.7%	-20.3%	-17.7%	2473
<b>CHILDREN IN HH:</b>												
Any	5.4%	3.1%	9.4%	464	-6.5%	-3.3%	1.0%	2286	-7.8%	-5.2%	-3.4%	4956
None	15.9%	8.9%	22.2%	867	8.4%	10.5%	12.4%	4396	-2.3%	-1.5%	1.9%	9049
<b>ACCOMMODATION:</b>												
Commercial accom	6.6%	6.7%	23.8%	802	2.3%	4.8%	9.1%	3766	-2.4%	-2.4%	1.6%	8012
- Serviced accom	1.8%	1.5%	22.0%	469	0.3%	-2.5%	6.6%	2591	-1.8%	-3.9%	1.2%	5347
- Hotel/motel/guesthouse	2.3%	3.2%	24.1%	416	1.0%	0.7%	8.8%	2327	-1.4%	-3.2%	2.2%	4758
- Bed & Breakfast	3.9%	-11.5%	-6.0%	51	-8.1%	-26.7%	-15.9%	236	-7.3%	-12.6%	-9.8%	526
Total self-catering rented	24.9%	16.8%	33.1%	333	6.9%	9.7%	16.5%	1051	-3.4%	-2.4%	3.7%	2452

