

## GB TOURISM SURVEY - March 2011 SUMMARY OF RESULTS

### 1. Headlines

- In the month of March, there were 8.0 million domestic tourism trips in Great Britain, an 8% decrease from 8.7 million in 2010.
- The number of bednights and total expenditure also fell by 14% and 12% respectively during the month.
- Reflecting the GB trend, within England, trips fell by 10% from 7.3 million to 6.6 million.
- In England, total nights were down by 13% while spend also fell by 10%.
- Looking at the past 12 months, there were 6.5 million fewer trips taken in Great Britain compared to the same period the year before.

### 2. Trip Characteristics

- It is important to note that in 2010 Easter school holidays in a number of areas began at the end of March whereas in 2011 they did not begin until April which may have impacted on trip numbers during March 2011.
- In the first quarter of 2011, there were differences in performance by trip purpose; holiday trips and visits to friends and family increased by 6% and 5% respectively compared to Jan-March 2010 despite the March decline. The number of business trips fell slightly (by 1%) during the same period.
- Within holiday trips, there were increases in both the number of shorter 1-3 night breaks (up by 7%) and also longer holidays (up by 2%). The value of these holiday trips also grew; shorter breaks by 10% and 4+ night holidays by 8%.
- There were variations by location type with seaside and small towns experiencing the greatest increases in trip volumes (8% and 7% respectively) and values (19% in seaside locations and 11% in small towns). The number of trips to large cities and towns also rose by 5% and by 3% in value. Trips to the countryside were down by 4% in volume and 6% in value terms compared with Q1 2010.

### 3. Overseas Travel by UK Residents

- In the year to March 2011, UK residents made 4% fewer trips abroad compared to April '09 - March '10, while spend decreased by 1%. Looking specifically at the month of March, outbound travel volumes were unchanged compared with March 2010 while spend decreased by 6% at the same time.

### 4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 41% for the month of March (5% higher than in March 2010).
- The quarterly attractions monitor showed that in March 2011 visitor admissions were down by 2%.

## KEY MEASURES

### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
<b>March '11</b>									
GB	8.7	8.0	-8%	23.9	20.7	-14%	1,460	1,289	-12%
England	7.3	6.6	-10%	19.5	16.9	-13%	1,185	1,066	-10%
<b>Jan-Mar '11</b>									
GB	21.1	22.1	+5%	53.9	55.6	+3%	3,253	3,426	+5%
England	17.7	18.5	+4%	43.1	45.9	+7%	2,617	2,802	+7%

### Purpose of Trip – March 2011

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
<b>GB</b>									
Holiday	3.3	3.3	+1%	9.8	9.1	-7%	618	636	+3%
Business	2.0	1.5	-22%	4.4	3.3	-24%	494	319	-35%
VFR	3.2	2.5	-10%	8.7	7.8	-11%	304	299	-2%
<b>England</b>									
Holiday	2.7	2.6	-3%	8.0	6.9	-14%	497	495	0%
Business	1.6	1.3	-17%	3.2	2.9	-12%	393	291	-26%
VFR	2.8	2.5	-12%	7.5	6.8	-9%	257	252	-2%

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

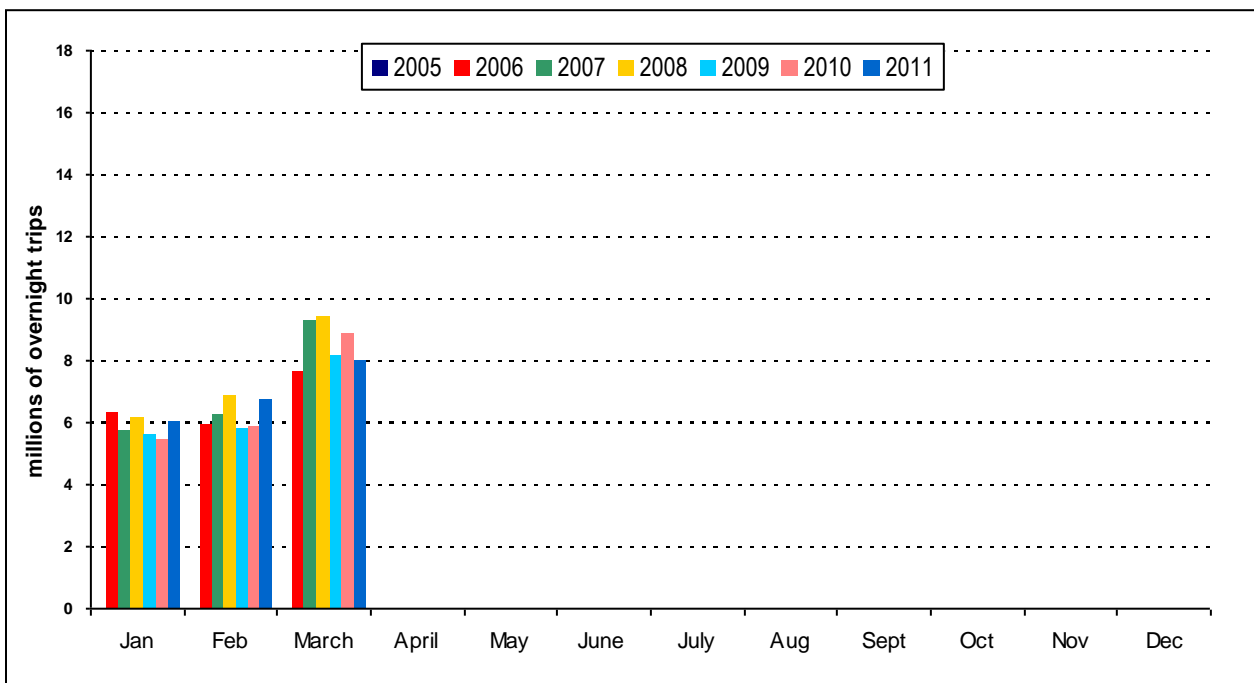
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
<b>GB</b>									
Holiday	7.3	7.7	+6%	19.9	20.3	+2%	1,383	1,514	+9%
Business	4.2	4.2	-1%	9.0	8.8	-2%	945	925	-2%
VFR	8.8	9.3	+5%	22.6	22.6	+0%	788	869	+10%
<b>England</b>									
Holiday	5.8	6.2	+7%	15.7	15.6	0%	1,083	1,176	+9%
Business	3.5	3.6	+2%	7.2	7.4	+3%	784	776	+1%
VFR	7.8	8.1	+4%	18.9	19.6	+4%	657	744	+10%

### Outbound Travel – UK Residents

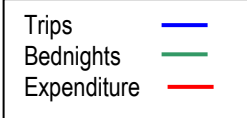
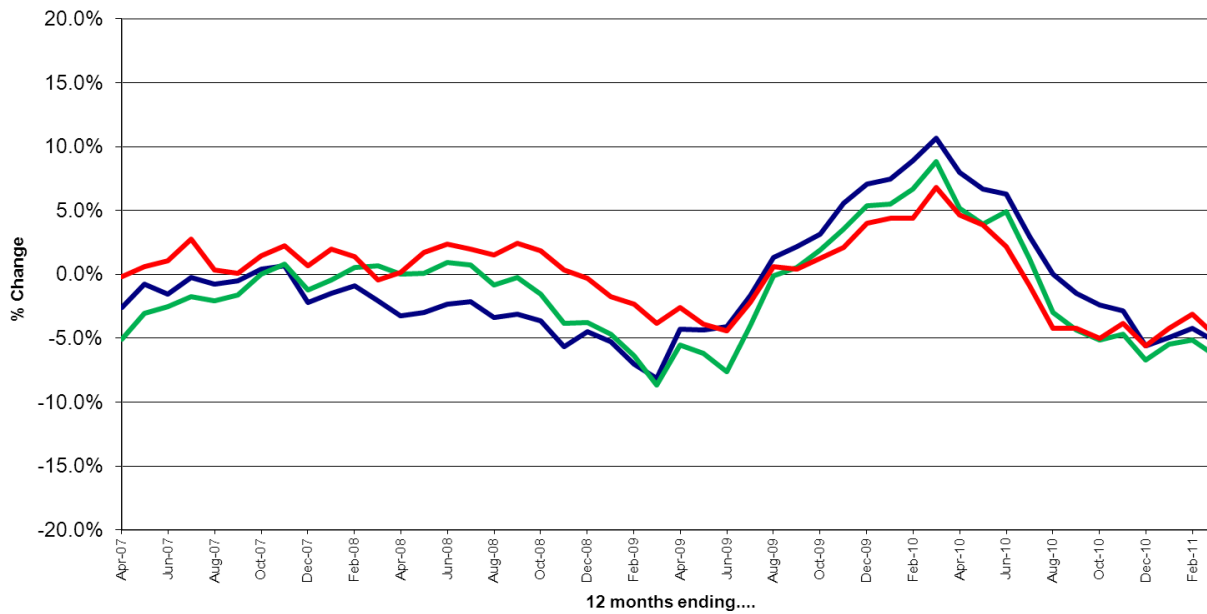
	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	2011	% +/-	2010	2011	% +/-
<b>March</b>	3.6	3.6	0%	2.2	2.1	-6%
<b>January-March</b>	10.2	10.2	0%	6.0	5.8	-4%
<b>April '10 – Mar '11</b>	57.5	54.9	-4%	30.7	31.0	+1%

## 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 (March 2010 vs March 2011)
- Year to date (January– March 2010 vs January– March 2011)
- 12 month rolling (April 2009– March 2010 vs April 2010– March 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.

