

GB TOURISM SURVEY - May 2011 SUMMARY OF RESULTS

1. Headlines

- In the month of May, there were 10.8 million domestic tourism trips in Great Britain, an 8% decrease from 11.8 million in 2010.
- The number of bednights also fell by 5% during May while expenditure was unchanged compared to May 2010.
- Reflecting the GB trend, in England, trips declined by 10% from 9.8 million to 8.8 million.
- In England, both total nights and spending fell by 6% and 1% respectively.

2. Trip Characteristics

- The overall decline in trip volumes in May was driven primarily by holiday travel which fell back by 12% after an exceptionally strong April.
- Considering the period between January and May 2011 there were differences in performance by trip purpose. Holiday trips in Great Britain increased by 3% overall though this masks some noticeable variations by trip length. The number of shorter 1-3 night breaks taken during the period rose by 1% compared to a 9% increase for longer 4+ night holidays. At the same time, the number of trips taken to visit friends and relatives dropped by 1% while the volume of domestic overnight business trips also fell by 2%.
- In the first five months of the year, there were variations in the number of trips taken by demographic group. The number taken by the two younger age brackets (16-24s and 25-34s) fell by 6% and 5% respectively while the volume of trips taken by 45-54s and over 54s rose by 9% and 5% respectively. Meanwhile, there was a 6% increase in the number of trips taken by households without children whereas households with children took 8% fewer trips.
- During the January to May period, there were increases in the number of trips taken to small town locations (up 5%), the countryside (up 2%) and also to large city or town locations (up 1%). However, the volume of trips to the seaside fell slightly (-2%) compared to the same period in 2010.

3. Overseas Travel by UK Residents

- In the year to May 2011, UK residents made 1% more trips abroad compared to June '09 - May '10, while spend rose by 2%. Between January and May 2011 outbound travel volumes rose by 5% on 2010 levels while expenditure 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 50% for the month of May (2% higher than in May 2010).
- The Q2 England Attractions Monitor showed that visits to visitor attractions rose by 1% in the month of May compared to May 2010.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
May '11									
GB	11.8	10.8	-8%	34.7	33.0	-5%	1,979	1,983	0%
England	9.8	8.8	-10%	27.6	26.0	-6%	1,595	1,578	-1%
Jan-May '11									
GB	44.2	44.8	+1%	121.7	125.5	+3%	6,999	7,449	+6%
England	36.7	37.2	+1%	96.3	101.5	+5%	5,647	6,023	+7%

Purpose of Trip – May 2011

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	6.4	5.7	-12%	21.1	20.4	-3%	1,241	1,220	-2%
Business	1.5	1.4	-8%	3.4	2.8	-16%	356	380	+7%
VFR	3.5	3.4	-4%	9.3	8.8	-5%	339	354	+4%
England									
Holiday	5.1	4.4	-15%	16.1	15.5	-4%	951	936	-2%
Business	1.3	1.2	-7%	2.9	2.3	-21%	309	323	+5%
VFR	3.0	2.9	-3%	7.8	7.4	-5%	295	297	+1%

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

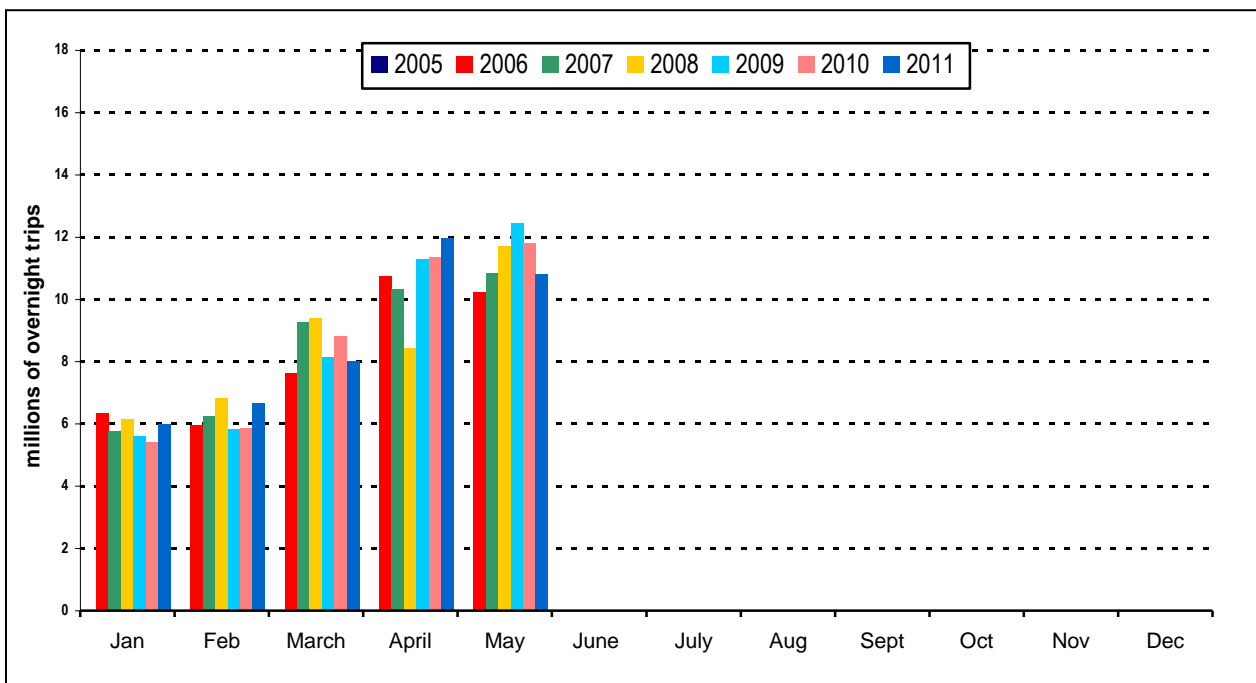
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	19.0	19.6	+3%	59.0	61.9	+5%	3,635	4,042	+11%
Business	7.2	7.0	-2%	15.2	15.2	0%	1,617	1,608	-1%
VFR	16.8	16.6	-1%	43.5	42.8	-2%	1,536	1,598	+4%
England									
Holiday	15.0	15.5	+3%	45.5	47.6	+5%	2,862	3,129	+9%
Business	6.0	6.0	+1%	12.3	12.8	+5%	1,332	1,373	+3%
VFR	14.6	14.4	-1%	35.9	36.3	+1%	1,286	1,354	+5%

Outbound Travel – UK Residents

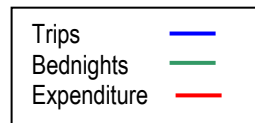
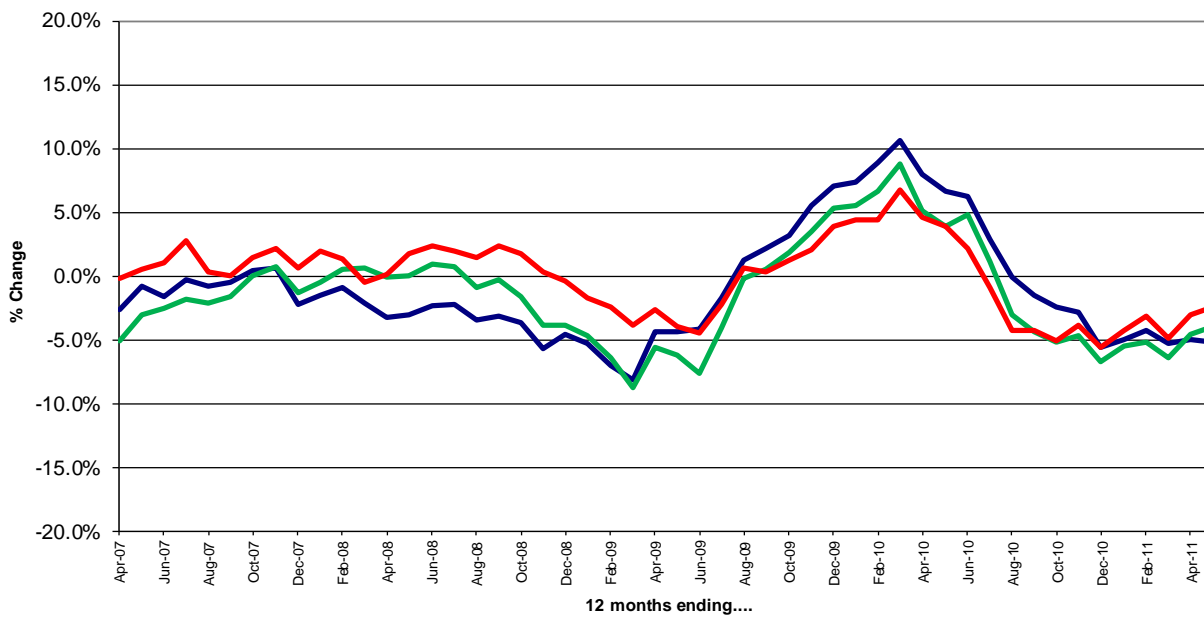
	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	2011	% +/-	2010	2011	% +/-
May	4.7	5.1	11%	2.5	2.7	5%
January-May	19.2	20.1	5%	11.1	10.9	-2%
June '10 – May '11	56.2	56.5	1%	30.9	31.6	2%

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 (May 2010 vs May 2011)
- Year to date (January - May 2010 vs January – May 2011)
- 12 month rolling (June 2009 – May 2010 vs June 2010 – May 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 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												England												
	Month: May 2011			Unweighted Trips	YTD: January - May 2011			Unweighted Trips	12 month rolling June 2010 - May 2011			Unweighted Trips	Month: May 2011			Unweighted Trips	YTD: January - May 2011			Unweighted Trips	12 month rolling June 2010 - May 2011			Unweighted Trips	
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips
TOTAL	-8.3%	-5.1%	0.2%	1646	1.4%	3.1%	6.4%	6457	-5.2%	-4.1%	-2.5%	16865	TOTAL	-9.6%	-5.8%	-1.1%	1341	1.4%	5.3%	6.7%	5354	-5.8%	-3.7%	-3.3%	13923
PURPOSE:													PURPOSE:												
Pure Holiday	-11.5%	-3.4%	-1.7%	887	3.4%	4.9%	11.2%	2906	-4.5%	-5.0%	-0.6%	8334	Pure Holiday	-14.7%	-4.0%	-1.6%	681	3.1%	4.5%	9.3%	2290	-4.5%	-5.1%	-1.4%	6622
- 1-3 nights holiday	-20.6%	-19.8%	-15.6%	501	1.0%	-0.2%	3.6%	1916	-4.7%	-5.2%	0.9%	4962	- 1-3 nights holiday	-25.7%	-26.2%	-18.9%	385	0.8%	-0.1%	1.7%	1535	-5.1%	-5.7%	-0.2%	4015
- 4+ nights holiday	6.0%	7.2%	16.4%	386	9.0%	8.9%	22.8%	990	-4.3%	-4.9%	-2.0%	3372	- 4+ nights holiday	8.9%	12.2%	23.7%	295	8.9%	8.3%	21.5%	753	-3.5%	-4.8%	-2.7%	2598
VFR (on holiday)	9.2%	-7.1%	3.6%	278	-4.1%	-4.8%	1.5%	1258	-9.7%	-10.5%	-1.0%	3180	VFR (on holiday)	6.9%	-10.8%	-1.4%	241	-3.1%	-0.3%	3.7%	1080	-10.9%	-10.5%	-2.3%	2688
HOLIDAY (TOTAL)	-7.4%	-4.1%	-1.0%	1165	1.1%	2.1%	9.3%	4164	-6.0%	-6.4%	-0.6%	11514	HOLIDAY (TOTAL)	-10.1%	-5.4%	-1.5%	922	1.1%	3.1%	8.2%	3368	-6.4%	-6.5%	-1.6%	9309
VFR (non-holiday)	-13.8%	5.3%	5.8%	253	2.3%	4.7%	7.6%	1234	-1.5%	5.4%	3.4%	3002	VFR (non-holiday)	-10.9%	13.7%	4.8%	221	1.4%	4.8%	7.8%	1085	-2.0%	4.4%	5.1%	2663
VFR (TOTAL)	-3.5%	-5.3%	4.4%	532	-1.0%	-1.5%	4.0%	2492	-5.8%	-4.1%	0.9%	6182	VFR (TOTAL)	-2.8%	-5.0%	0.7%	464	-0.9%	0.9%	5.3%	2166	-6.6%	-4.3%	0.8%	5353
Business	-8.4%	-15.5%	6.7%	190	-2.2%	0.1%	-0.6%	851	-8.5%	-3.8%	-11.2%	1910	Business	-7.4%	-21.3%	4.5%	155	0.8%	4.5%	3.1%	731	-9.7%	-3.5%	-12.4%	1593
RDAs:													RDAs:												
Adv West Midlands	-3.6%	6.7%	14.5%	95	-4.4%	1.7%	7.8%	404	-6.4%	9.2%	-5.1%	1091	Adv West Midlands	-3.6%	6.7%	14.5%	95	-4.4%	1.7%	7.8%	404	-6.4%	9.2%	-5.1%	1091
East of England	-24.5%	-27.8%	-14.5%	131	5.8%	4.6%	3.1%	538	-10.0%	-6.6%	-8.8%	1328	East of England	-24.5%	-27.8%	-14.5%	131	5.8%	4.6%	3.1%	538	-10.0%	-6.6%	-6.8%	1328
East Midlands	18.3%	31.2%	3.0%	127	17.8%	16.0%	25.5%	495	4.2%	0.0%	6.8%	1186	East Midlands	18.3%	31.2%	3.0%	127	17.8%	16.0%	25.5%	495	4.2%	0.0%	6.8%	1186
London	1.1%	4.4%	-7.3%	139	-8.8%	4.3%	-7.2%	584	1.0%	6.0%	6.9%	1459	London	1.1%	4.4%	-7.3%	139	-8.8%	4.3%	-7.2%	584	1.0%	6.0%	6.9%	1459
North West	-14.4%	-18.1%	-7.6%	168	1.6%	3.3%	2.2%	693	-9.5%	-7.8%	-6.9%	1774	North West	-14.4%	-18.1%	-7.6%	168	1.6%	3.3%	2.2%	693	-9.5%	-7.8%	-6.9%	1774
ONE North East	-24.7%	2.0%	-39.3%	49	6.5%	7.6%	-12.2%	226	-6.9%	-7.1%	-13.1%	527	ONE North East	-24.7%	2.0%	-39.3%	49	6.5%	7.6%	-12.2%	226	-6.9%	-7.1%	-13.1%	527
South East England	-15.5%	-17.2%	2.7%	199	-9.6%	-5.2%	3.1%	851	-14.0%	-12.2%	-11.4%	2272	South East England	-15.5%	-17.2%	2.7%	199	-9.6%	-5.2%	3.1%	851	-14.0%	-12.2%	-11.4%	2272
South West	-2.4%	5.0%	13.1%	301	9.6%	12.4%	22.0%	1036	-3.4%	-2.0%	-3.8%	2969	South West	-2.4%	5.0%	13.1%	301	9.6%	12.4%	22.0%	1036	-3.4%	-2.0%	-3.8%	2969
Yorkshire Forward	-15.6%	-2.6%	3.3%	142	1.9%	9.5%	12.3%	568	-3.9%	-4.0%	7.2%	1474	Yorkshire Forward	-15.6%	-2.6%	3.3%	142	1.9%	9.5%	12.3%	568	-3.9%	-4.0%	7.2%	1474
LOCATION TYPE:													LOCATION TYPE:												
Seaside	-16.1%	-10.2%	-0.4%	390	-2.3%	1.4%	11.8%	1218	-9.7%	-7.5%	-5.8%	3661	Seaside	-20.0%	-12.1%	-3.7%	293	-2.4%	-0.6%	11.1%	991	-11.0%	-10.3%	-6.8%	2944
Large city/ large town	-10.5%	-6.6%	-10.3%	546	0.7%	4.9%	1.0%	2557	-5.1%	-3.9%	-1.5%	6278	Large city/ large town	-11.3%	-6.5%	-11.9%	483	0.5%	9.6%	0.0%	2219	-4.9%	-0.2%	-1.9%	5455
Small town	2.9%	4.0%	13.4%	397	5.2%	3.8%	12.7%	1586	-1.0%	0.8%	3.5%	4047	Small town	6.9%	13.3%	26.8%	323	6.5%	9.5%	19.0%	1278	-2.2%	-1.8%	0.9%	3244
Countryside/ village	-5.2%	3.8%	10.6%	352	2.3%	3.5%	7.6%	1215	-6.9%	-5.5%	-7.2%	3228	Countryside/ village	-8.7%	-2.6%	2.8%	273	2.3%	2.8%	6.3%	963	-7.2%	-2.9%	-7.2%	2555
AGE:													AGE:												
16-24	-13.7%	-1.5%	-8.9%	175	-6.2%	6.1%	17.9%	796	-1.5%	13.6%	6.6%	2047	16-24	-20.9%	-15.7%	-26.1%	140	-7.8%	5.6%	14.3%	675	-0.7%	11.2%	5.2%	1749
25-34	-22.1%	-16.4%	-3.0%	237	-5.0%	-1.6%	2.6%	1015	-11.5%	-12.9%	-8.2%	2628	25-34	-18.5%	-4.8%	5.8%	197	-8.9%	-2.0%	1.3%	820	-14.8%	-16.0%	-11.3%	2157
35-44	-11.3%	-8.3%	-0.7%	336	0.2%	0.2%	1.9%	1366	-7.7%	-6.1%	-7.2%	3651	35-44	-12.9%	-12.3%	-10.6%	275	3.9%	7.4%	3.4%	1140	-6.0%	-2.7%	-6.9%	3021
45-54	-18.1%	-23.0%	-5.6%	271	8.9%	8.0%	8.7%	1179	2.1%	-1.2%	1.4%	2989	45-54	-15.7%	-21.2%	1.6%	230	14.1%	13.9%	16.4%	989	2.9%	3.0%	3.0%	2435
55+	12.6%	15.6%	9.0%	627	5.2%	5.3%	7.1%	2101	-5.3%	-5.8%	-0.9%	5550	55+	8.2%	16.0%	8.0%	497	2.5%	5.3%	3.3%	1726	-7.4%	-6.8%	-3.0%	4558
SEG:													SEG:												
AB	-4.7%	-0.2%	13.4%	549	3.7%	7.0%	9.5%	2227	-1.4%	-0.3%	1.5%	5471	AB	-6.6%	-3.7%	6.5%	462	6.0%	9.5%	9.6%	1915	-1.3%	1.7%	1.1%	4606
C1	-10.0%	-0.8%	-4.1%	490	3.7%	10.0%	14.3%	2004	-5.6%	-4.9%	-2.9%	5228	C1	-10.5%	3.9%	-1.2%	408	1.1%	11.0%	13.3%	1646	-6.0%	-4.3%	-3.3%	4316
C2	-9.8%	-5.2%	-13.8%	317	-1.7%	0.5%	-9.2%	1123	-4.0%	3.1%	-2.0%	3080	C2	-10.5%	-5.6%	-10.1%	247	0.5%	11.2%	-4.8%	904	-5.9%	2.3%	-5.7%	2473
DE	-10.6%	-10.7%	-8.9%	290	-6.6%	-11.8%	-1.9%	1102	-15.0%	-16.8%	-14.6%	3086	DE	-13.9%	-14.1%	-12.4%	217	-9.7%	-15.7%	-6.0%	864	-16.3%	-18.9%	-14.7%	2494
CHILDREN IN HH:													CHILDREN IN HH:												
Any	-19.0%	-17.0%	-8.1%	560	-7.5%	-7.3%	-1.1%	2224	-6.3%	-5.4%	-2.8%	6052	Any	-19.5%	-16.2%	-7.9%	458	-9.1%	-4.9%	-0.9%	1822	-7.8%	-4.5%	-4.4%	4944
None	-2.4%	4.0%	3.9%	1086	5.9%	8.9%	9.7%	4233	-4.6%	-3.4%	-2.3%	10814	None	-4.2%	3.0%	2.1%	884	6.8%	11.3%	10.0%	3528	-4.8%	-3.4%	-2.9%	8972
ACCOMMODATION:													ACCOMMODATION:												
Commercial accom	-10.1%	-3.9%	-3.3%	1013	1.2%	3.3%	5.3%	3624	-3.1%	-3.0%	-2.1%	9829	Commercial accom	-12.0%	-5.5%	-4.0%	804	1.3%	4.9%	5.5%	2955	-3.5%	-3.6%	-3.1%	7993
- Serviced accom	-13.4%	-9.4%	-7.7%	595	-1.3%	-4.9%	1.4%	2537	-3.3%	-6.0%	-3.6%	6419	- Serviced accom	-14.4%	-12.2%	-7.9%	493	0.0%	-2.4%	3.5%	2122	-3.0%	-6.0%	-3.5%	5359
- Hotel/motel/guesthouse	-13.0%	-5.4%	-5.4%	519	-0.8%	-3.8%	2.9%	2280	-2.8%	-5.6%	-2.7%	5682	- Hotel/motel/guesthouse	-11.4%	-5.3%	-3.0%	442	0.8%	0.1%	5.7%	1911	-2.5%	-5.0%	-2.2%	4767
- Bed & Breakfast	-24.5%	-38.0%	-29.1%	62	-10.3%	-17.0%	-15.6%	225	-8.1%	-9.0%	-10.3%	662	- Bed & Breakfast	-38.9%	-51.8%	-40.8%	43	-10.2%	-23.6%	-17.6%	185	-8.4%	-15.1%	-14.4%	526
Total self-catering rented	-13.7%	-4.8%	1.3%	368	2.0%	5.5%	14.0%	941	-4.5%	-2.0%	1.1%	3103	Total self-catering rented	-18.4%	-6.6%	-0.7%	268	0.4%	6.6%	10.1%	720	-5.9%	-3.4%	-2.0%	2395
- Camping & Caravanning (inc. owned caravans)	-8.0%	-1.0%	1.0%	326	5.9%	9.7%	8.6%	718	-5.1%	-2.3%	-6.8%	2403	- Camping & Caravanning (inc. owned caravans)	-15.9%	-4.4%	-8.2%	231	2.4%	9.3%	4.7%	537	-9.6%	-8.2%	-15.5%	1767
- Other self-catering rented	-12.3%	-4.4%	8.3%	128	2.9%	3.1%	22.2%	414	-3.0%	-2.4%	6.8%	1213	- Other self-catering rented	-6.1%	3.6%	13.1%	98	4.9%	7.9%	19.6%	310	0.1%	0.5%	8.4%	949
Hostels	78.0%	61.1%	17.6%	33	19.6%	12.2%	-3.8%	92	18.7%	12.6%	-8.2%	226	Hostels	107.9%	98.1%	40.0%	28	7.4%	-12.9%	-35.3%	71	18.4%	11.0%	-15.3%	170
Own home/friends/relatives	-3.1%	0.9%	18.7%	630	2.8%	5.4%	11.5%	2744	-8.0%	-4.9%	-4.3%	6804	Own home/friends/relatives	-3.7%	2.2%	13.9%</									

