

## GB TOURISM SURVEY - October 2011 SUMMARY OF RESULTS

### 1. Headlines

- In the month of October, there were 11.1 million domestic tourism trips in Great Britain, a 10% increase from 10.0 million in 2010 and for the second month in a row the highest recorded volume for the given month since the start of the current survey.
- The number of bednights and amount spent also increased somewhat, by 6% and 7% respectively compared to October 2010.
- Considering the first ten months of the year, trip volumes are 7% higher than in 2010, while expenditure has grown by 14%.
- Reflecting the GB trend, in England, trips grew by 9% from 8.3 million to 9.0 million. In October both total nights and spending also increased, by 3% and 5% respectively.

### 2. Trip Characteristics

- Temperatures in the UK in October were above average whilst rainfall was lower than average in England.
- After falling slightly in September year-on-year, business trips in Great Britain showed growth again in October, and volumes are now up by 14% for the year-to-date.
- Visits to friends and relatives (VFR) increased by 10% in October 2011 compared to October 2010 (6% for the year-to-date), while holiday trips increased slightly by 2% (5% for the year-to-date).
- Between January and October 2011, trip volumes in Great Britain have increased particularly among those aged 45+ and those in the higher social grades of AB and C1, while they have increased more slowly among those aged 16-24 and those in the C2 and DE social grades.
- Trip volumes have also increased more slowly this year among households with children (2%) than those without (10%).
- The highest levels of growth in the year to October were in the northern and eastern areas of England, with London and the South East performing less well.

### 3. Overseas Travel by UK Residents

- In the first ten months of 2011, UK residents made a similar number of trips abroad compared to the same period in 2010, while spend decreased by 4%. The month of October saw a 2% decline in trip volumes.

### 4. Other Tourism Surveys

- The UK Occupancy Survey showed that bedspace occupancy in the UK in October 2011 was unchanged from October 2010 at 50%, while room occupancy also remained unchanged at 67%.
- VisitEngland's Accommodation Business Confidence Monitor suggested that businesses had a reasonable autumn period, with 32% of businesses reporting increased visitors and 42% reporting the same level as last autumn.

## KEY MEASURES



### Year on Year Comparison – All Trips

|                    | TRIPS (MILLIONS) |       |       | NIGHTS (MILLIONS) |       |       | SPEND (£M) |        |       |
|--------------------|------------------|-------|-------|-------------------|-------|-------|------------|--------|-------|
|                    | 2010             | 2011  | % +/- | 2010              | 2011  | % +/- | 2010       | 2011   | % +/- |
| <b>October '11</b> |                  |       |       |                   |       |       |            |        |       |
| GB                 | 10.0             | 11.1  | +10%  | 28.5              | 30.1  | +6%   | 1,722      | 1,847  | +7%   |
| England            | 8.3              | 9.0   | +9%   | 22.8              | 23.5  | +3%   | 1,366      | 1,430  | +5%   |
| <b>Jan-Oct '11</b> |                  |       |       |                   |       |       |            |        |       |
| GB                 | 100.4            | 107.6 | +7%   | 318.7             | 337.0 | +6%   | 17,314     | 19,662 | +14%  |
| England            | 82.6             | 88.3  | +7%   | 250.8             | 265.6 | +6%   | 13,807     | 15,508 | +12%  |

### Purpose of Trip – October 2011

|                | TRIPS (MILLIONS) |      |       | NIGHTS (MILLIONS) |      |       | SPEND (£M) |      |       |
|----------------|------------------|------|-------|-------------------|------|-------|------------|------|-------|
|                | 2010             | 2011 | % +/- | 2010              | 2011 | % +/- | 2010       | 2011 | % +/- |
| <b>GB</b>      |                  |      |       |                   |      |       |            |      |       |
| Holiday        | 4.8              | 4.8  | +2%   | 14.9              | 15.0 | 0%    | 969        | 967  | 0%    |
| Business       | 1.4              | 1.9  | +36%  | 3.6               | 4.0  | +13%  | 340        | 447  | +32%  |
| VFR            | 3.5              | 3.8  | +10%  | 8.7               | 10.2 | +17%  | 372        | 384  | +3%   |
| <b>England</b> |                  |      |       |                   |      |       |            |      |       |
| Holiday        | 3.8              | 3.9  | 0%    | 11.7              | 11.5 | -2%   | 745        | 757  | +2%   |
| Business       | 1.2              | 1.6  | +33%  | 3.1               | 3.1  | -1%   | 281        | 327  | +16%  |
| VFR            | 3.0              | 3.2  | +6%   | 7.1               | 8.2  | +16%  | 320        | 307  | -4%   |

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

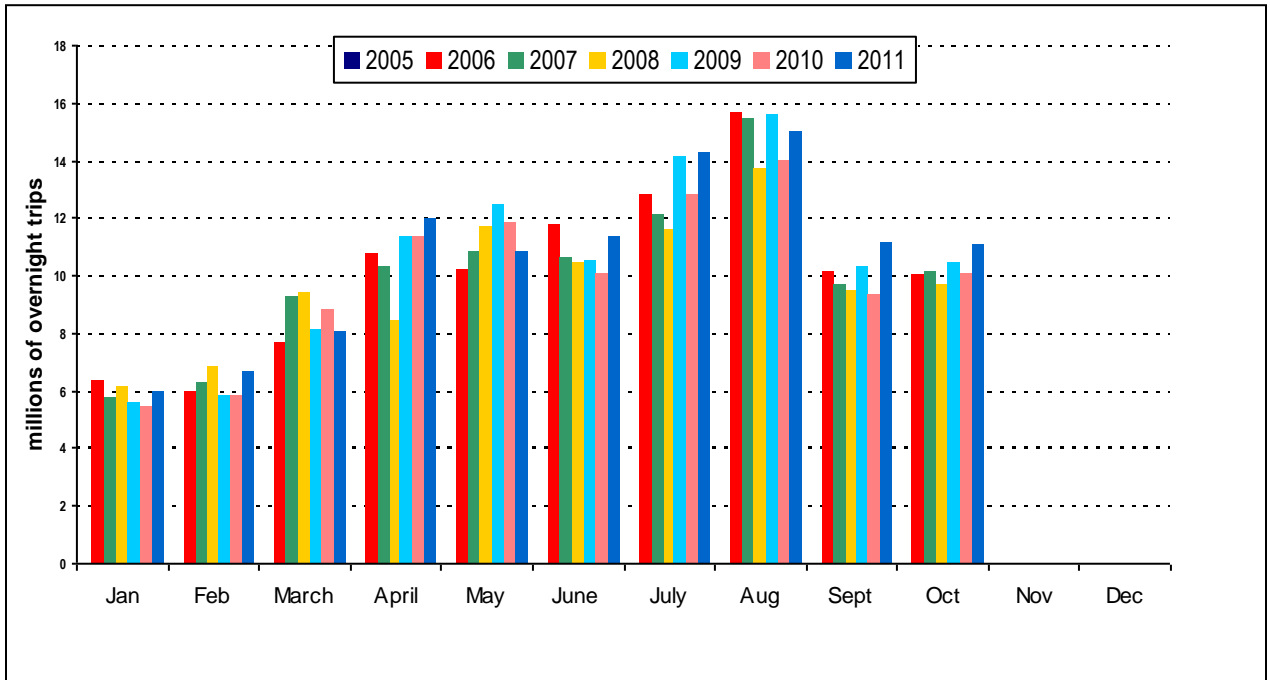
|                | TRIPS (MILLIONS) |      |       | NIGHTS (MILLIONS) |       |       | SPEND (£M) |        |       |
|----------------|------------------|------|-------|-------------------|-------|-------|------------|--------|-------|
|                | 2010             | 2011 | % +/- | 2010              | 2011  | % +/- | 2010       | 2011   | % +/- |
| <b>GB</b>      |                  |      |       |                   |       |       |            |        |       |
| Holiday        | 50.2             | 53.0 | +5%   | 185.3             | 194.9 | +5%   | 10,498     | 11,807 | +13%  |
| Business       | 13.5             | 15.4 | +14%  | 31.9              | 34.6  | +8%   | 3,033      | 3,663  | +21%  |
| VFR            | 33.8             | 35.9 | +6%   | 93.0              | 97.3  | +5%   | 3,395      | 3,759  | +11%  |
| <b>England</b> |                  |      |       |                   |       |       |            |        |       |
| Holiday        | 39.7             | 41.7 | +5%   | 142.3             | 147.3 | +4%   | 8,195      | 9,049  | +10%  |
| Business       | 11.2             | 13.0 | +17%  | 25.3              | 28.1  | +11%  | 2,465      | 3,001  | +22%  |
| VFR            | 29.4             | 30.8 | +5%   | 77.0              | 81.4  | +6%   | 2,839      | 3,105  | +9%   |

### Outbound Travel – UK Residents

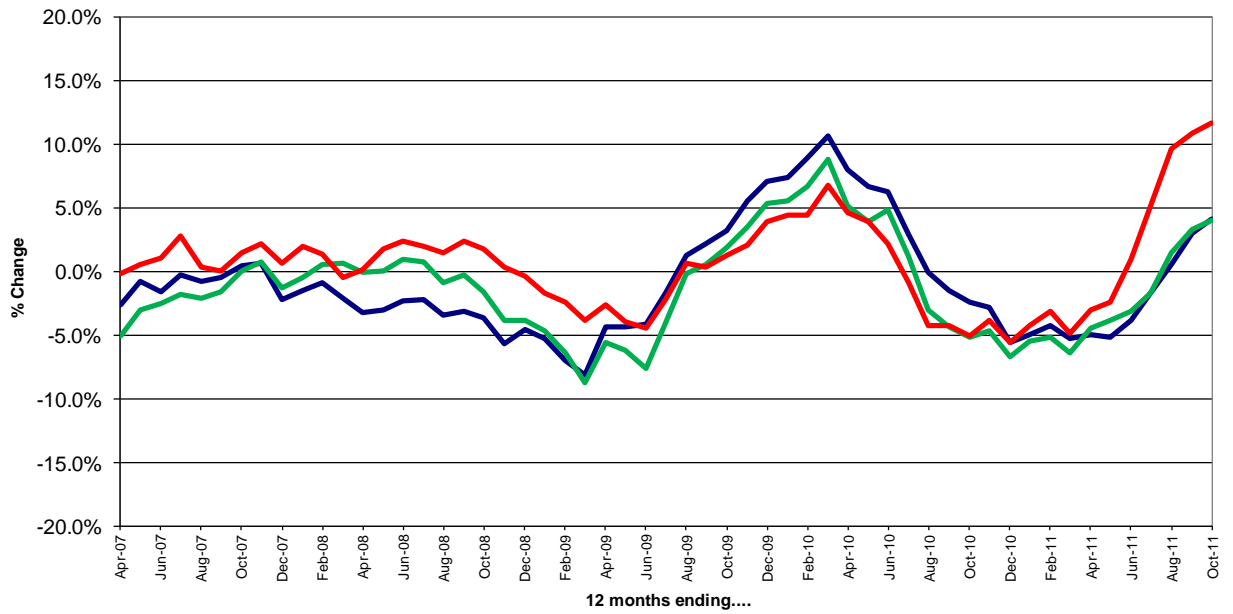
|                   | TRIPS (MILLIONS) |      |       | SPEND (£BN) |      |       |
|-------------------|------------------|------|-------|-------------|------|-------|
|                   | 2010             | 2011 | % +/- | 2010        | 2011 | % +/- |
| October           | 5.2              | 5.1  | -2%   | 2.8         | 2.8  | -3%   |
| January-October   | 49.5             | 49.5 | 0%    | 28.5        | 27.5 | -4%   |
| Nov '10 – Oct '11 | 56.1             | 55.6 | -1%   | 31.9        | 30.7 | -4%   |

## TREND CHARTS

### GB All Trips – Domestic Trip Volume by Month



### GB All Trips - Annual Percentage Change



Trips ———  
 Bednights ———  
 Expenditure ———

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



