GB TOURISM SURVEY - September 2011
SUMMARY OF RESULTS

1. Headlines

- In the month of September, there were 11.1 million domestic tourism trips in Great Britain, a 20% increase from 9.3 million in 2010 and the highest recorded volume for the month since the start of the current survey.
- The number of bednights and amount spent also rose, by 13% and 15% respectively compared to September 2010.
- Reflecting the GB trend, in England, trips grew by 22% from 7.5 million to 9.1 million.
- In England, both total nights and spending increased by 15% and 13% respectively.

2. Trip Characteristics

- After a cooler-than-average July and August, temperatures in September were above average whilst rainfall was lower than average.
- In September, across Great Britain, there were increases in visits to friends and relatives (VFR) (33%) and holidays (18%), and a slight decrease in business trips (-1%) compared to September last year.
- However, during the first nine months of 2011, business trips have increased by 11% compared to the same time last year. Holiday trips and VFR trips have both increased by 6% over the year so far.
- Though increases in trip volumes were seen across different ages and social grades between January and September 2011, increases were greater among the older age groups (35+) and higher social grades, while those aged 16-34 and in the C2 and DE social grades saw trips volumes increase only slightly, by less than 3%.
- Most types of accommodation have continued to benefit from increased trip volumes. However, trips involving a stay in a bed & breakfast have fallen back by 2% over the course of the year.
- All types of destinations have benefitted from increased trip volumes, particularly countryside / village trips (up 10%).

3. Overseas Travel by UK Residents

- In the first nine months of 2011, UK residents made a similar number of trips abroad compared to the same period in 2010, while spend increased by 4%.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that bedspace occupancy in the UK in September 2011 was unchanged from September 2010 at 55%.
- 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.
- The Q3 England Attractions Monitor showed visits to visitor attractions increased by 4% in September compared to September 2010.

KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
September '11									
GB	9.3	11.1	+20%	28.8	32.4	+13%	1,830	2,096	+15%
England	7.5	9.1	+22%	22.5	25.8	+15%	1,448	1,640	+13%
Jan-Sep '11									
GB	90.4	96.6	+7%	290.2	306.9	+6%	15,592	17,815	+14%
England	74.3	79.3	+7%	228.0	242.0	+6%	12,441	14,078	+13%

Purpose of Trip – September 2011

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	4.8	5.6	+18%	17.4	19.7	+13%	1,111	1,245	+12%
Business	1.5	1.5	-1%	3.2	3.7	+16%	366	371	+1%
VFR	2.8	3.7	+33%	7.6	8.5	+12%	309	435	+41%
England									
Holiday	3.8	4.5	+19%	13.7	15.5	+13%	873	945	+8%
Business	1.2	1.3	+8%	2.7	3.1	+15%	286	316	+11%
VFR	2.4	3.1	+33%	5.8	6.8	+17%	255	343	+35%

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

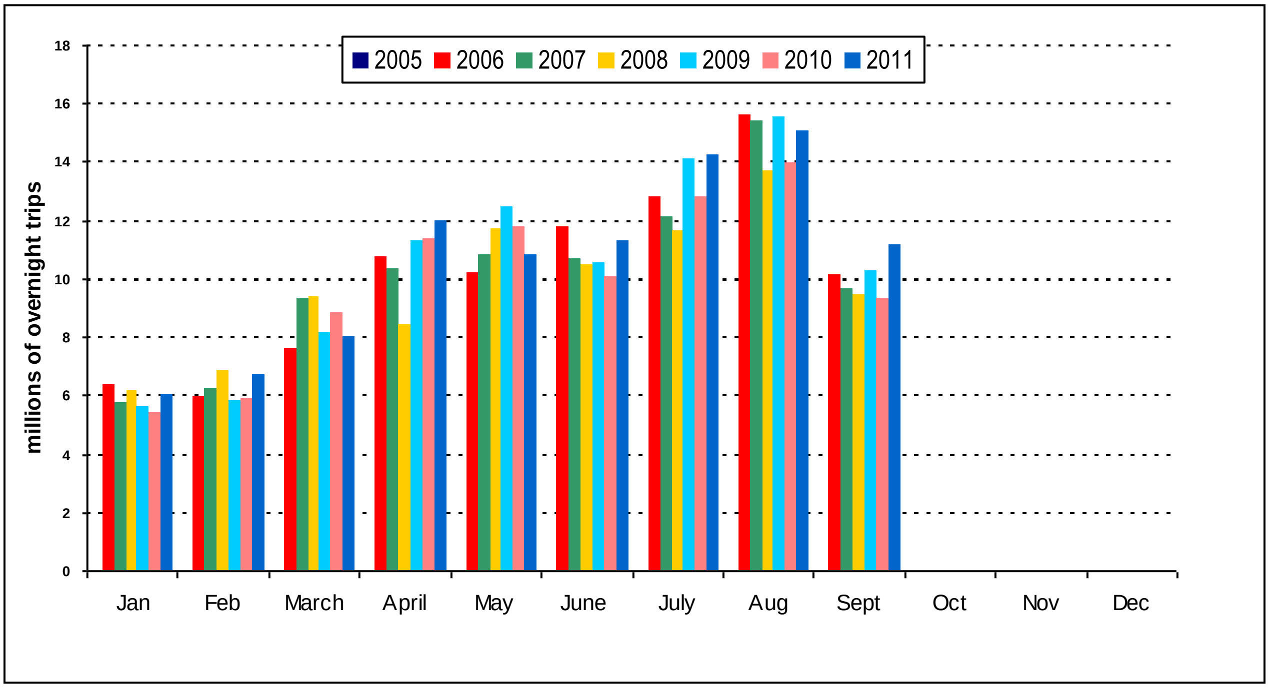
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	45.5	48.1	+6%	170.4	179.9	+6%	9,529	10,840	+14%
Business	12.1	13.5	+11%	28.4	30.5	+8%	2,693	3,216	+19%
VFR	30.4	32.1	+6%	84.3	87.1	+3%	3,023	3,376	+12%
England									
Holiday	35.9	37.8	+5%	130.6	135.8	+4%	7,450	8,292	+11%
Business	10.0	11.5	+15%	22.2	25.1	+13%	2,184	2,674	+22%
VFR	26.4	27.6	+5%	69.9	73.2	+5%	2,519	2,798	+11%

Outbound Travel – UK Residents

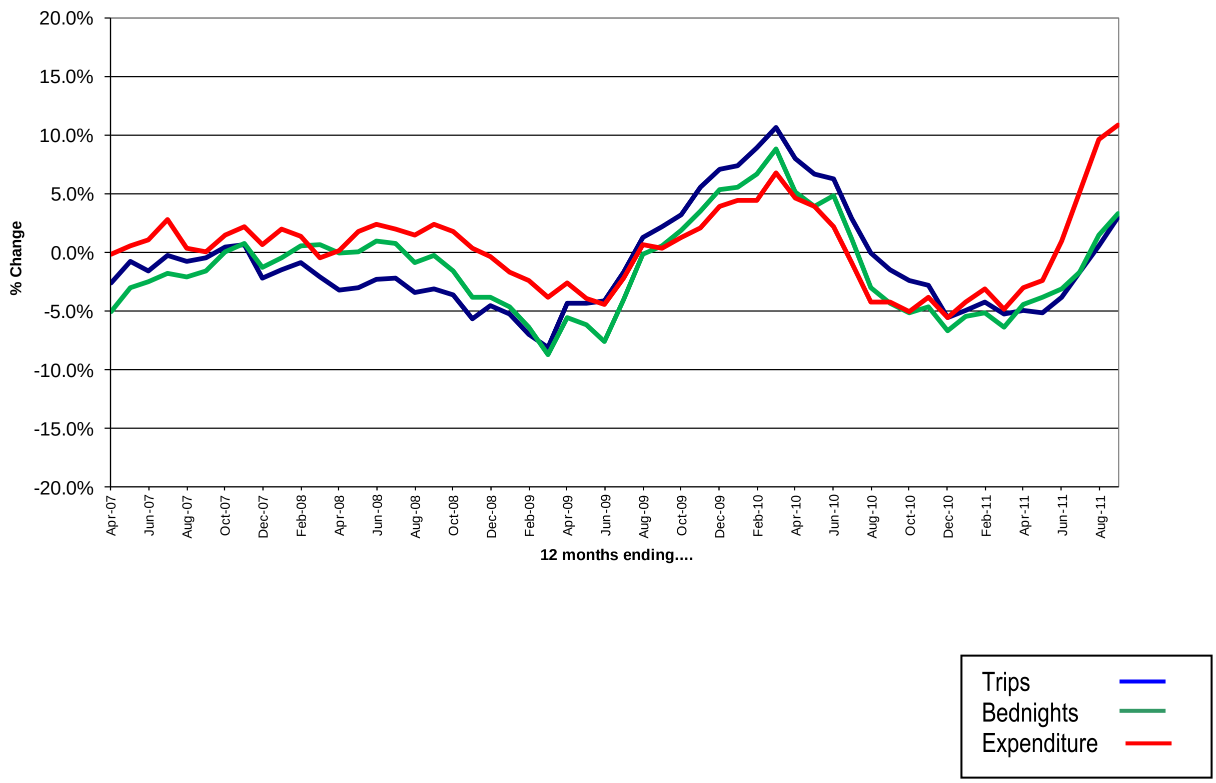
	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	**2011**	**% +/-**	**2010**	**2011**	**% +/-**
September	5.9	6.0	+1%	1.4	1.5	7%
January-September	44.3	44.5	0%	12.7	13.2	4%
Oct '10 – Sep '11	55.9	55.7	0%	16.5	17.4	5%

TREND CHARTS

GB All Trips – Domestic Trip Volume by Month



GB All Trips - Annual Percentage Change



Year on Year Comparison, by Trip Characteristic

VisitEngland

Important Note

The analysis on the following page shows year-on-year comparisons across a number of trip characteristics, considering:

- Month (September 2010 vs September 2011)
- Year to date (January - September 2010 vs January – September 2011)
- 12 month rolling (October 2009 – September 2010 vs October 2010 – September 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: September 2011			Unweighted	YTD: January - September 2011			Unweighted	month rolling October 2010 - September 20			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	19.6%	12.8%	14.5%	1639	6.8%	5.8%	14.3%	14089	3.0%	3.2%	10.9%	17471
PURPOSE:												
Pure Holiday	17.9%	13.1%	12.1%	855	5.8%	5.6%	13.8%	7225	2.8%	3.3%	10.8%	8516
- 1-3 nights holiday	23.3%	26.5%	15.0%	544	6.5%	6.5%	11.9%	4261	2.7%	2.6%	9.3%	5154
- 4+ nights holiday	8.7%	6.4%	9.4%	311	4.7%	5.2%	15.4%	2964	2.9%	3.7%	12.3%	3362
VFR (on holiday)	39.4%	24.2%	33.5%	277	6.3%	3.4%	11.3%	2550	-0.9%	-0.6%	10.1%	3352
HOLIDAY (TOTAL)	22.5%	15.1%	14.7%	1133	5.9%	5.1%	13.4%	9775	1.7%	2.3%	10.7%	11868
VFR (non-holiday)	28.3%	0.0%	49.3%	283	4.8%	3.2%	12.0%	2269	2.9%	2.5%	10.6%	3045
VFR (TOTAL)	33.4%	11.6%	40.8%	561	5.6%	3.3%	11.7%	4819	0.9%	0.7%	10.3%	6397
Business	-0.5%	15.8%	1.4%	186	11.1%	7.7%	19.4%	1641	6.7%	5.7%	12.4%	2080
Regions:												
West Midlands	1.3%	-19.8%	-19.6%	90	1.2%	-6.6%	4.1%	876	-3.4%	-3.8%	-6.2%	1127
East of England	73.4%	64.5%	44.1%	134	16.7%	14.5%	16.0%	1167	5.0%	9.4%	6.6%	1434
East Midlands	15.6%	27.7%	6.6%	109	14.0%	14.0%	25.7%	1029	7.3%	3.8%	16.7%	1230
London	0.8%	-2.3%	-11.9%	124	-5.4%	5.9%	3.4%	1115	-2.3%	5.7%	9.5%	1474
North West	33.3%	29.4%	35.5%	207	13.1%	11.0%	14.5%	1535	5.4%	5.4%	11.0%	1927
North East	71.7%	6.2%	61.0%	64	26.7%	22.6%	14.7%	485	25.8%	18.8%	20.6%	608
South East	1.3%	-0.4%	1.5%	178	-1.1%	-2.4%	14.3%	1864	-5.1%	-6.0%	4.4%	2330
South West	9.8%	1.5%	0.0%	286	5.4%	3.2%	14.1%	2427	1.3%	0.1%	9.9%	2937
Yorkshire & the Humber	63.4%	52.7%	58.6%	178	7.6%	9.4%	15.8%	1220	3.7%	5.2%	16.2%	1517
LOCATION TYPE:												
Seaside	21.0%	7.4%	8.7%	401	5.3%	5.6%	12.9%	3253	2.2%	2.8%	11.6%	3787
Large city/ large town	13.7%	16.9%	13.9%	601	6.2%	4.4%	13.6%	5048	1.9%	-0.4%	10.0%	6502
Small town	16.8%	3.7%	6.9%	351	7.8%	6.9%	14.1%	3305	4.3%	7.9%	10.3%	4168
Countryside/ village	33.9%	24.9%	31.6%	318	10.1%	5.9%	17.9%	2808	5.6%	3.4%	12.9%	3407
AGE:												
16-24	17.9%	-4.8%	38.0%	164	0.2%	-1.7%	17.2%	1635	1.6%	4.1%	14.9%	2100
25-34	40.0%	49.6%	34.6%	274	3.2%	7.1%	13.1%	2217	0.1%	3.1%	12.4%	2790
35-44	29.2%	18.0%	16.1%	339	6.7%	2.6%	13.0%	3047	2.0%	1.9%	7.2%	3754
45-54	2.2%	8.6%	7.8%	252	10.8%	10.8%	16.5%	2548	9.2%	9.3%	15.9%	3114
55+	16.1%	6.7%	6.7%	610	9.5%	7.6%	13.3%	4642	2.1%	0.8%	8.5%	5714
SEG:												
AB	25.3%	21.5%	16.5%	548	9.5%	6.4%	19.2%	4690	6.7%	5.2%	17.0%	5821
C1	13.5%	5.1%	-4.6%	472	9.5%	12.2%	18.1%	4360	5.2%	9.9%	12.0%	5449
C2	11.2%	6.6%	41.6%	279	0.4%	0.1%	3.5%	2504	-1.6%	0.3%	3.7%	3059
DE	29.1%	16.2%	22.1%	340	2.1%	-0.5%	3.8%	2536	-5.8%	-9.3%	-2.5%	3142
CHILDREN IN H/H:												
Any	22.5%	22.0%	3.3%	549	1.6%	0.3%	6.6%	5082	0.1%	1.1%	5.2%	6276
None	18.4%	10.1%	18.3%	1090	9.5%	8.6%	17.6%	9007	4.4%	4.3%	13.2%	11195
ACCOMMODATION:												
Commercial accom	15.6%	14.8%	12.7%	1030	7.1%	7.3%	13.9%	8500	5.0%	5.9%	11.0%	10232
- Serviced accom	13.4%	18.5%	13.6%	678	5.9%	2.7%	12.0%	5340	3.9%	1.3%	9.3%	6674
- Hotel/motel/guesthouse	13.2%	21.9%	11.1%	594	7.2%	4.8%	13.1%	4731	4.7%	2.7%	9.4%	5947
- Bed & Breakfast	18.1%	3.6%	37.0%	82	-2.2%	-5.7%	3.4%	556	-1.7%	-2.7%	8.9%	669
Total self-catering rented	22.0%	10.6%	12.5%	331	9.2%	9.6%	18.2%	2951	7.9%	9.2%	16.9%	3292
-Camping & Caravanning (inc. owned caravans)	25.0%	9.8%	11.0%	263	4.9%	4.3%	11.1%	2244	3.6%	3.5%	9.7%	2438
-Other self-catering rented	23.7%	15.6%	14.2%	120	18.2%	19.0%	25.9%	1156	16.3%	18.6%	23.4%	1362
Hostels	-24.4%	3.9%	-38.1%	14	-9.9%	-7.5%	-10.6%	148	-8.9%	-8.8%	-18.3%	192
Own home/friends'/relatives'	28.7%	9.6%	20.7%	576	7.0%	4.5%	15.7%	5412	0.4%	1.1%	9.3%	6998

England

	Month: September 2011			Unweighted	YTD: January - September 2011			Unweighted	month rolling October 2010 - September 20			Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	21.7%	14.5%	13.3%	1346	6.7%	6.1%	13.2%	11569	2.1%	2.4%	9.1%	14399
PURPOSE:												
Pure Holiday	18.9%	13.2%	8.2%	686	5.4%	4.0%	11.3%	5681	2.3%	1.3%	8.4%	6750
- 1-3 nights holiday	24.0%	26.8%	15.8%	435	7.1%	7.3%	12.1%	3434	3.1%	2.7%	9.8%	4189
- 4+ nights holiday	10.2%	6.3%	1.1%	251	2.7%	2.4%	10.5%	2238	0.8%	0.6%	6.9%	2549
VFR (on holiday)	36.5%	29.4%	27.1%	226	7.5%	7.1%	13.5%	2189	-1.3%	-1.2%	9.4%	2846
HOLIDAY (TOTAL)	22.8%	16.0%	10.6%	912	6.0%	4.7%	11.7%	7868	1.2%	0.7%	8.6%	9595
VFR (non-holiday)	29.7%	5.4%	42.9%	245	1.7%	1.8%	8.0%	1957	-0.1%	0.1%	6.6%	2654
VFR (TOTAL)	32.8%	16.8%	34.5%	472	4.7%	4.8%	11.1%	4146	-0.7%	-0.6%	8.1%	5501
Business	7.7%	14.9%	10.5%	158	14.6%	12.8%	22.4%	1400	8.0%	10.5%	13.4%	1754
Regions:												
West Midlands	1.3%	-19.8%	-19.6%	90	1.2%	-6.6%	4.1%	876	-3.4%	-3.8%	-6.2%	1127
East of England	73.4%	64.5%	44.1%	134	16.7%	14.5%	16.0%	1167	5.0%	9.4%	6.6%	1434
East Midlands	15.6%	27.7%	6.6%	109	14.0%	14.0%	25.7%	1029	7.3%	3.8%	16.7%	1230
London	0.8%	-2.3%	-11.9%	124	-5.4%	5.9%	3.4%	1115	-2.3%	5.7%	9.5%	1474
North West	33.3%	29.4%	35.5%	207	13.1%	11.0%	14.5%	1535	5.4%	5.4%	11.0%	1927
North East	71.7%	6.2%	61.0%	64	26.7%	22.6%	14.7%	485	25.8%	18.8%	20.6%	608
South East	1.3%	-0.4%	1.5%	178	-1.1%	-2.4%	14.3%	1864	-5.1%	-6.0%	4.4%	2330
South West	9.8%	1.5%	0.0%	286	5.4%	3.2%	14.1%	2427	1.3%	0.1%	9.9%	2937
Yorkshire & the Humber	63.4%	52.7%	58.6%	178	7.6%	9.4%	15.8%	1220	3.7%	5.2%	16.2%	1517
LOCATION TYPE:												
Seaside	31.4%	24.6%	19.8%	337	6.4%	6.0%	13.4%	2617	2.8%	2.9%	11.3%	3072
Large city/ large town	18.6%	17.7%	16.9%	531	4.8%	4.4%	11.1%	4348	0.3%	-0.6%	6.9%	5599
Small town	9.2%	-0.7%	-6.0%	266	7.3%	11.4%	16.8%	2620	2.1%	7.6%	10.3%	3313
Countryside/ village	29.2%	11.2%	12.1%	234	10.8%	2.7%	14.1%	2225	5.8%	0.3%	10.5%	2708
AGE:												
16-24	6.7%	-4.0%	27.8%	132	-1.9%	-1.9%	15.6%	1380	-0.2%	1.3%	12.9%	1777
25-34	46.0%	45.8%	54.3%	229	0.4%	7.1%	13.2%	1799	-2.5%	2.5%	11.5%	2278
35-44	34.7%	41.6%	20.9%	282	9.4%	8.1%	13.6%	2520	3.8%	5.6%	7.2%	3125
45-54	2.8%	-4.0%	0.0%	202	13.6%	9.4%	18.2%	2086	9.8%	6.2%	15.7%	2540
55+	20.0%	8.1%	1.2%	502	7.6%	5.9%	8.8%	3776	-0.2%	-1.2%	3.9%	4672
SEG:												
AB	25.7%	14.9%	10.4%	453	9.1%	5.1%	14.8%	3896	5.5%	3.5%	12.4%	4844
C1	13.0%	3.7%	-6.5%	386	9.0%	15.4%	19.6%	3609	4.7%	11.8%	12.9%	4525
C2	19.2%	22.1%	50.7%	234	3.0%	3.4%	7.7%	2037	-1.3%	0.7%	4.9%	2485
DE	34.2%	24.0%	24.7%	271	-0.6%	-5.0%	-1.6%	1999	-8.3%	-14.0%	-6.7%	2516
CHILDREN IN H/H:												
Any	27.9%	23.6%	10.5%	456	1.3%	2.1%	8.0%	4137	-0.5%	2.1%	5.8%	5151
None	19.3%	11.8%	14.1%	891	9.4%	8.2%	15.4%	7427	3.4%	2.5%	10.4%	9245
ACCOMMODATION:												
Commercial accom	18.8%	14.9%	12.4%	841	6.8%	7.7%	13.1%	6876	4.1%	5.3%	9.8%	8314
- Serviced accom	16.0%	16.4%	16.0%	560	6.2%	4.0%	12.8%	4440	3.6%	1.5%	9.3%	5565
- Hotel/motel/guesthouse	14.9%	17.8%	12.3%	492	7.2%	6.7%	14.1%	3942	4.2%	3.4%	9.6%	4968
- Bed & Breakfast	32.4%	17.3%	58.2%	66	0.4%	-7.7%	3.8%	452	-0.1%	-5.1%	8.5%	545
Total self-catering rented	24.8%	11.2%	5.6%	263	7.2%	9.2%	14.5%	2262	5.0%	7.8%	12.8%	2520
-Camping & Caravanning (inc. owned caravans)	32.8%	16.6%	18.8%	208	7.9%	8.0%	17.0%	1721	5.0%	5.9%	13.6%	1862
-Other self-catering rented	15.7%	8.1%	-3.4%	95	10.8%	14.5%	14.8%	847	9.5%	13.8%	13.4%	1008
Hostels	-2.6%	56.0%	-50.0%	11	-8.1%	-16.5%	-22.9%	113	-4.2%	-13.0%	-24.6%	154
Own home/friends'/relatives'	28.5%	16.3%	17.6%	482	6.8%	4.9%	13.3%	4537	-0.2%	-0.2%	6.2%	5898