

GB TOURISM SURVEY - November 2011

SUMMARY OF RESULTS

1. Headlines

- In the month of November, there were 7.9 million domestic overnight tourism trips in Great Britain, a 13% increase from 7.0 million in November 2010.
- The amount spent also increased, by 4%; however, bednights were down slightly (by 1%).
- Considering the first eleven months of 2011, trip volumes were 8% higher than in 2010, while expenditure grew by 13%.
- Reflecting the GB trend, in England, trips in November grew by 14% from 6.0 million in 2010 to 6.8 million in 2011. In November, both total nights and spending also increased in England, by 4%.

2. Trip Characteristics

- Temperatures in the UK in November were significantly above average, while rainfall was lower than average in England.
- All trip type volumes increased in Great Britain in November 2011 compared to November 2010, particularly visits to friends and relatives (VFR) and business trips, which increased by 16% and 15% respectively. Holidays increased by 3%.
- However, although more VFR trips were taken, they were of shorter duration, and as a result both the number of nights (-5%) and spend (-6%) decreased. The number of holiday nights also decreased (-5%).
- Volumes for all trip purposes have increased for the year-to-date. Business trips have increased the most over the first eleven months of the year, by 14%, while VFR trips have increased by 7% and holidays 5%.
- While trip volumes in Great Britain increased for all age groups and social grades between January and November 2011, they have increased particularly among those in older age groups (especially 45+) and the higher social grades of AB and C1.
- 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.

3. Overseas Travel by UK Residents

- In the first eleven months of 2011, UK residents made a similar number of trips abroad compared to the same period in 2010, while spend decreased by 3%. The month of November saw a 3% decline in trip volumes.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that bedspace occupancy in the UK in November 2011 was increased from the same time in 2010 from 41% to 44%, while room occupancy also increased from 58% to 61%.
- The England attractions monitor showed that visits to visitor attractions in England increased by 9% year-on-year in November 2011.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
November '11									
GB	7.0	7.9	+13%	17.4	17.3	-1%	1,267	1,313	+4%
England	6.0	6.8	+14%	13.8	14.4	+4%	1,045	1,085	+4%
Jan-Nov '11									
GB	107.5	115.6	+8%	336.1	355.1	+6%	18,581	20,975	+13%
England	88.6	95.1	+7%	264.6	280.7	+6%	14,852	16,593	+12%

Purpose of Trip – November 2011

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	2.4	2.5	+3%	6.2	5.8	-5%	513	512	0%
Business	1.7	2.0	+15%	3.7	4.0	+6%	409	446	+9%
VFR	2.8	3.2	+16%	7.1	6.8	-5%	326	306	-6%
England									
Holiday	1.9	2.1	+7%	4.7	4.8	2%	414	433	+5%
Business	1.4	1.6	+13%	3.1	3.0	-2%	333	338	+2%
VFR	2.5	2.9	+16%	5.6	5.9	+6%	278	271	-3%

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

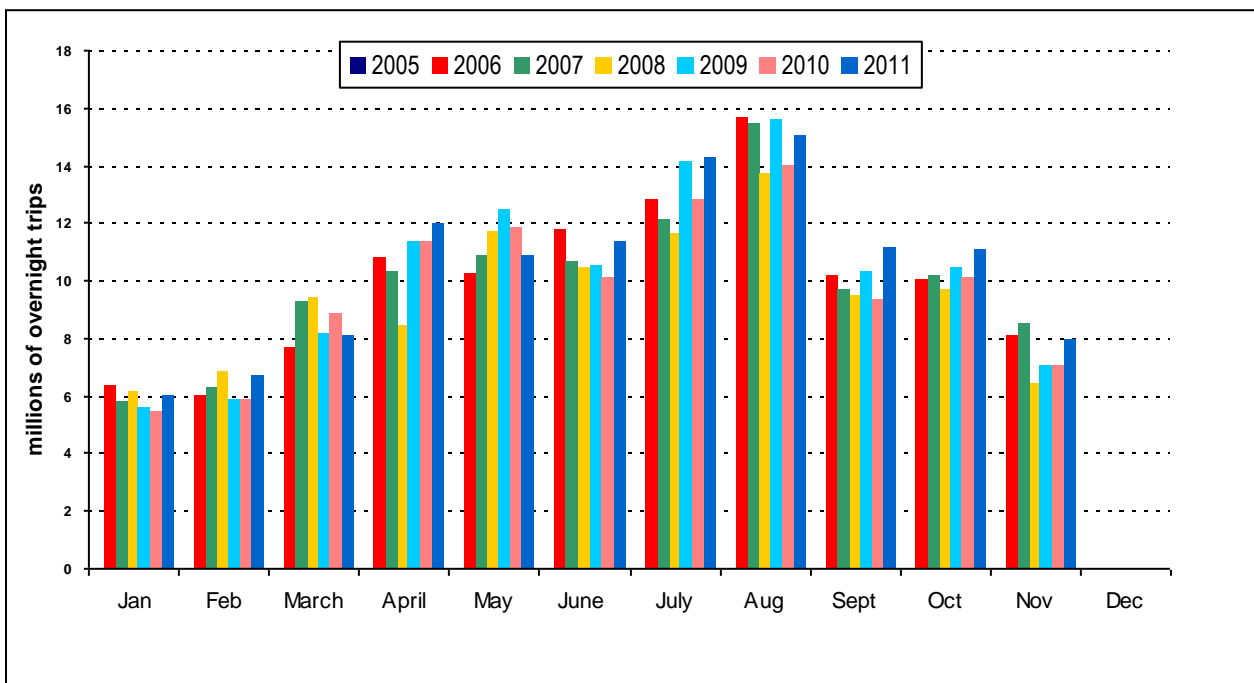
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	52.6	55.4	+5%	191.5	200.8	+5%	11,012	12,319	+12%
Business	15.3	17.4	+14%	35.7	39.3	+10%	3,442	4,109	+19%
VFR	36.6	39.1	+7%	100.1	104.1	+4%	3,721	4,066	+9%
England									
Holiday	41.7	43.8	+5%	146.9	152.0	+4%	8,609	9,482	+10%
Business	12.6	14.7	+16%	28.4	31.9	+12%	2,798	3,339	+19%
VFR	31.9	33.7	+6%	82.6	87.4	+6%	3,117	3,376	+8%

Outbound Travel – UK Residents

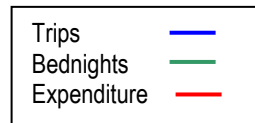
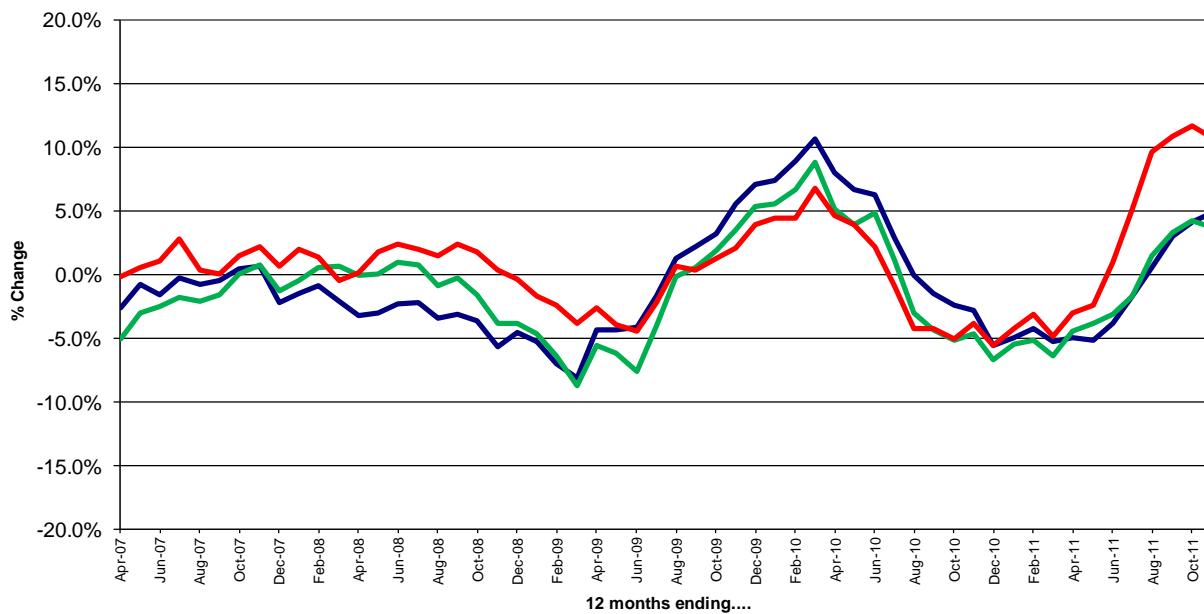
	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	2011	% +/-	2010	2011	% +/-
November	3.4	3.3	-3%	1.8	1.8	0%
January-November	52.9	53.0	0%	30.3	29.4	-3%
Nov '10 – Nov '11	55.9	55.7	0%	31.9	30.9	-3%

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

