

GB TOURISM SURVEY - December 2011

SUMMARY OF RESULTS



1. Headlines

- In the month of December, there were 11.1 million domestic overnight tourism trips in Great Britain, a 34% increase from 8.2 million in December 2010, which in turn saw a 22% decrease as a result of snow disruption.
- Bednights and amount spent also increased, by 28% and 39% respectively.
- Considering the year January to December 2011, trip volumes were 9% higher than in 2010, while expenditure grew by 15%, though this is in the context of CPI inflation of 4-5% through most of the year.
- Reflecting the GB trend, in England, trips in December grew by 33% from 6.9 million in 2010 to 9.2 million in 2011, and both total nights and spending also increased in England, by 28% and 33% respectively.

2. Trip Characteristics

- Temperatures in December 2011 were just above seasonal norms, whereas December 2010 was the coldest for a century, with snowfall causing widespread travel disruption.
- Across all trip types, trip volumes increased in Great Britain in December 2011 compared to December 2010, particularly for holidays and visits to friends and relatives (VFR), which increased by 42% and 34% respectively. Volumes for business trips increased by 9%.
- For the year January to December 2011, trips, bednights and expenditure increased for all trip purposes. Business trips saw the greatest increase of 14% in the number of trips taken, while expenditure on these trips increased by 21%. VFR trips increased by 10% and holidays increased by 7%, while expenditure for both increased by 13%.
- During the year, trip volumes in Great Britain increased for all age groups, social grades and household types. However, they increased particularly among higher age groups (35+), the higher social grades (AB and C1) and among those without children.
- Most types of accommodation benefited from the increase in trip volumes; this was particularly the case for hotels/guest houses and self-catering accommodation, while bed & breakfasts did not benefit to the same extent, with a 1% increase in volumes for the year.
- All English regions saw an increase in trip volumes in 2011 except London (2.5% decrease), though the capital saw an increase in trip volumes in 2010 compared to 2009, the only region of the country to do so. The North East (21%), East Midlands (17%), East of England (17%) and Yorkshire (17%) particularly benefited from the increase in trip volumes throughout the year.

3. Overseas Travel by UK Residents

- From January to December 2011, there was just a 1% increase in trips abroad compared to 2010 leaving levels 19% lower than in the peak year of 2008. Spend decreased slightly, by 2%. The month of December saw a 14% increase in trip volumes compared to 2010, when overseas travel was disrupted by snow.

4. Other Tourism Surveys

- The UK Occupancy survey showed room occupancy increased from 49% in December 2010 to 52% in December 2011.
- In the Accommodation Business Confidence monitor, 41% of businesses interviewed in January 2012 reported that in 2011 they had more visitors than in 2010, while 25% had fewer.
- The England Attractions Monitor reported that visits to visitor attractions in England increased by 28% year-on-year in December 2011.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
December '11									
GB	8.2	11.1	+34%	25.3	32.3	+28%	1,216	1,691	+39%
England	6.9	9.2	+33%	20.4	26.1	+28%	990	1,321	+33%
Jan-Dec '11									
GB	115.7	126.6	+9%	361.4	387.3	+7%	19,797	22,666	+15%
England	95.5	104.3	+9%	285.0	306.8	+8%	15,842	17,914	+13%

Purpose of Trip – December 2011

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	2.1	3.0	+42%	5.7	7.7	+34%	523	681	+30%
Business	1.1	1.2	+9%	2.0	2.5	+23%	203	291	+43%
VFR	5.0	6.6	+34%	17.4	21.7	+25%	473	661	+40%
England									
Holiday	1.9	2.4	+28%	4.8	5.9	+24%	463	549	+19%
Business	0.9	0.8	-1%	1.5	1.8	+19%	163	199	+22%
VFR	4.1	5.7	+39%	14.0	18.0	+29%	360	527	+46%

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

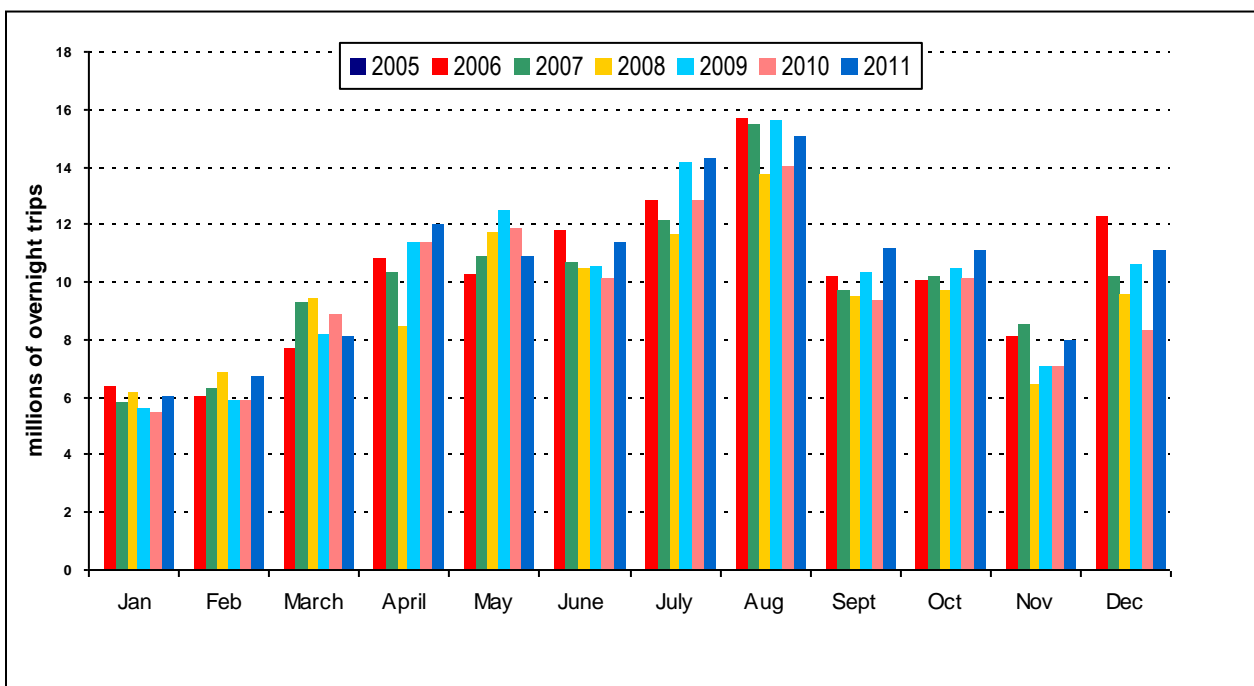
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2010	2011	% +/-	2010	2011	% +/-	2010	2011	% +/-
GB									
Holiday	54.7	58.4	+7%	197.2	208.5	+6%	11,534	13,000	+13%
Business	16.3	18.6	+14%	37.7	41.8	+11%	3,645	4,400	+21%
VFR	41.6	45.7	+10%	117.4	125.7	+7%	4,193	4,727	+13%
England									
Holiday	43.5	46.2	+6%	151.7	158.0	+4%	9,072	10,031	+11%
Business	13.5	15.5	+15%	29.9	33.7	+13%	2,961	3,538	+20%
VFR	36.0	39.4	+10%	96.5	105.4	+9%	3,478	3,903	+12%

Outbound Travel – UK Residents

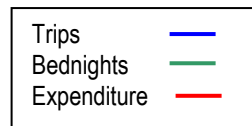
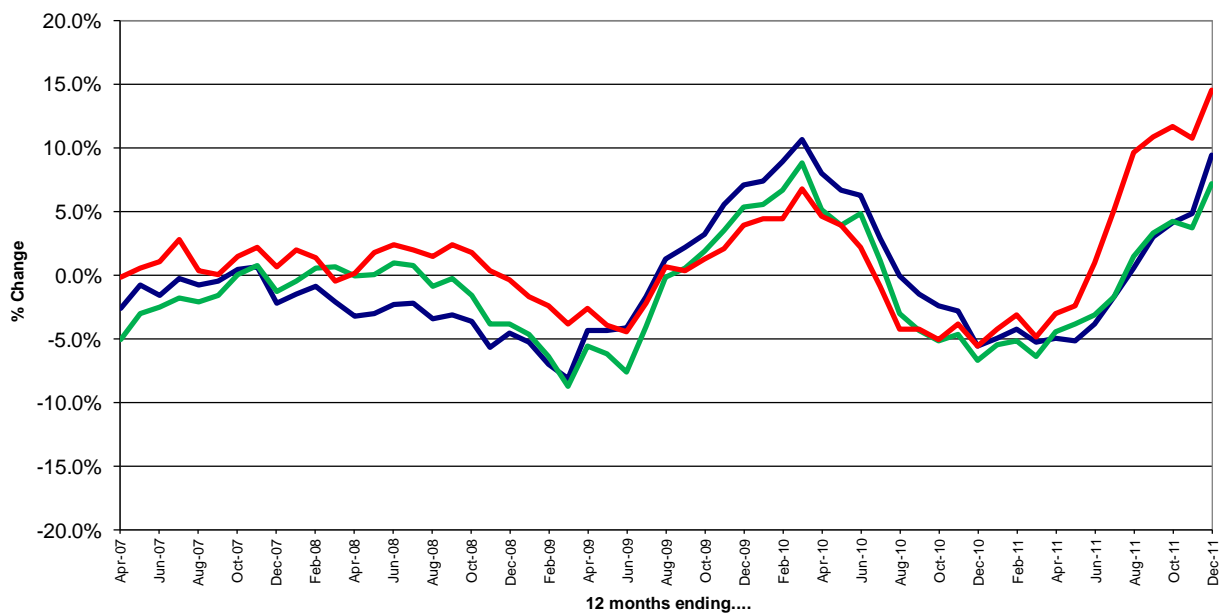
	TRIPS (MILLIONS)			SPEND (£BN)		
	2010	2011	% +/-	2010	2011	% +/-
December	2.7	3.0	+14%	1.5	1.7	+11%
January-December	55.6	56.1	+1%	31.8	31.1	-2%

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

