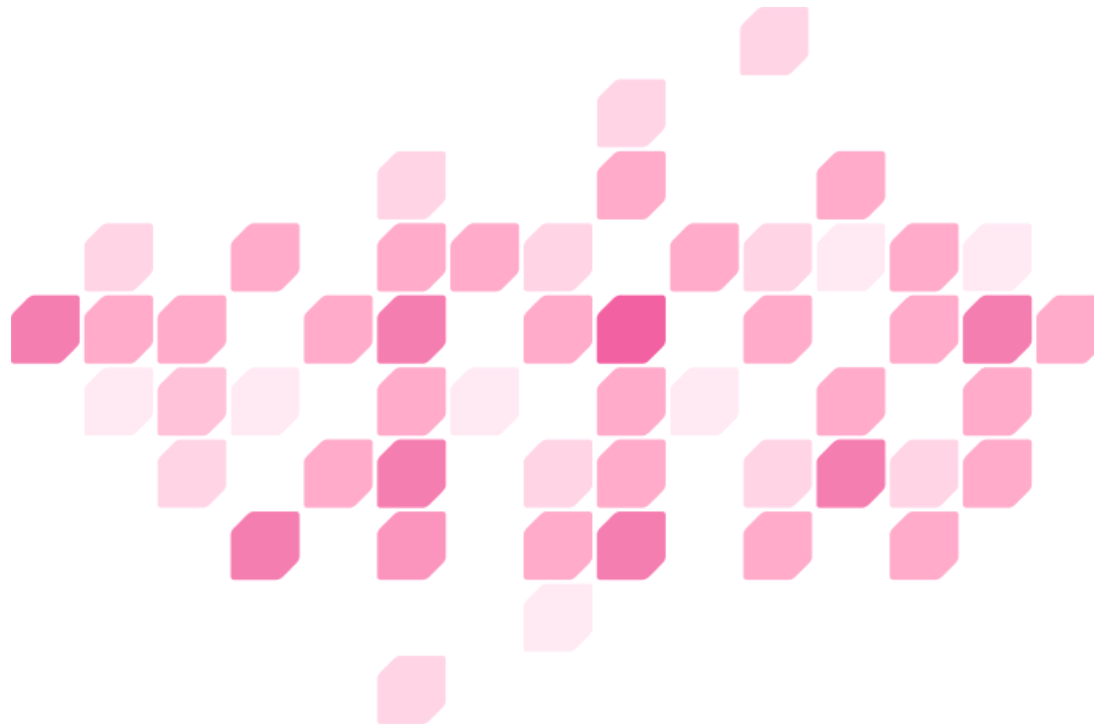




**UKTS - Deep Dive Report -  
The domestic UK holiday market  
Revised Report**

**JN: 217231**

**Date September 2011**



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# 1. Introduction

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## Overview

The UKTS (United Kingdom Tourism Survey) presents statistical information on the volume and value of tourism undertaken by the resident population of the United Kingdom to destinations within the UK and the Republic of Ireland. All of the information in the report comes from a face-to-face interview survey commissioned jointly by the national tourist boards - VisitEngland, VisitScotland, Northern Ireland Tourist Board (NITB) and Visit Wales (the Tourism Department of the Welsh Assembly Government).

This report is the first in a series of interpretative 'deep dive' reports and focuses on the specific characteristics of the holiday tourism market within the UK. A key aspect of the report has been to analyse the profile and trends of the domestic holiday market by trip length. Data from the survey has been analysed and presented on the basis of short trips of 1-3 nights, medium length trips of 4-7 nights and longer trips of 8 or more nights. The interpretation in the report first focuses on the UK market as a whole and then at an individual country level.

## Methodology

The UKTS comprises:

- Over 100,000 face-to-face interviews per annum, conducted in-home, resulting in a weekly sample size of over 2,000 adults aged 16 or over - representative of the UK population in relation to various demographic characteristics including gender, age group, socio-economic group, and geographical location
- Respondents are asked about any overnight trips taken in the last four weeks
- The questions were first added to TNS-RI's RSGB Omnibus survey on 4th May 2005 and have been asked continuously since that date.

## Sample Size

One of the advantages of UKTS is the extremely robust sample size at a UK level. On an annual basis, over 2,000 adults aged 16 or over are interviewed every week, resulting in a total annual contact sample of over 100,000 adults and annual data relating to around 18,000 trips. In this report we have combined the last five years of data for the period 2006-2010, which generates an extremely robust and representative data set. Data for 2005 has not been

included in this analysis as survey fieldwork did not begin until May of that year, meaning no data was collected for the first four months of the year. All of the 2006 to 2010 data covers a full 12-months' period allowing for valid comparison.

### **Report Structure**

The report begins with a summary table which provides an overview of the numbers of trips, bednights and the value of spend at a UK and then country level. Following this, the report focuses on trip based data, first looking at combined profile data for the five years (presented as a percentage share by destination), and then trended data (based on absolute values) across the five years' time period.

The next section provides a summary of the characteristics of the UK market holiday by trip length.

## 2. Overview and Summary of UK Domestic Holidays

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### Overview

This section includes detailed profile analysis based on combined data for 2006 to 2010 at a UK and where appropriate, individual country level, focusing on different trip lengths – 1-3, 4-7 and 8+ night 'pure' holidays. Trips that involve visiting friends and relatives on holiday have been excluded – the focus is on the 'pure holiday' market which is the primary focus for the national tourism organisations. Following this, the profile and characteristics of the holiday market are illustrated based on trended data across the five years' period.

### A Summary of UK Holidays

#### Short 1-3 night holidays...

*Short break holidays tend to involve a smaller party size reflecting their popularity with those in the younger and older lifecycle stages rather than families. They are more likely to involve a short break in a city or large town and to focus on serviced accommodation. Booking 'on spec' during the visit and online are also more prevalent than is the case for longer holidays. They are more likely to be taken during the first four months of the year (Jan-Apr) and in the last quarter (Oct-Dec), reflecting the importance of the Easter and Christmas holiday periods for these shorter trips.*

*Holidays of this length dominate the holiday market within Northern Ireland and to a lesser degree in England. Although they account for the largest share of holidays for all the constituent countries, Scotland, and particularly Wales, are less reliant on these shorter holidays.*

#### Key highlights

- 1-3 night holidays account for 34m trips, 67m nights and £5.8b spend per year. They account for around three in five (62%) of total holiday trips, a third (33%) of holiday nights and half (50%) of holiday spend. Although short in length, these trips tend to involve higher spending than longer holiday trips
- They are becoming **increasingly popular**, with the number of holiday trips of this length having risen by an average of +2% per annum since 2006, in line with the overall increase for holidays of all lengths. In particular, they rose significantly during 2009 by +18%

- They are much more **prevalent in Northern Ireland** where they account for eight out of ten (78%) of holidays, the majority of these being Northern Irish residents on holiday within the Province (81%)
- They also account for a considerable share of the holiday market in England (63%) but a lesser share in both Scotland (58%) and Wales (55%)
- They are more likely to be taken in **cities and large towns** with one in three (33%) taken in these large urban areas. Reflecting this, they account for one in ten (11%) of all holidays within London
- When compared to longer holidays they are much more prevalent among those aged **under 35 with no children** (20%)
- They are more likely to be taken by a couple. Around two in five (44%) consist of a **party size of two people**
- They are **less likely** to be taken by those from the less affluent DE socio-economic grade (15%) when compared to longer holidays
- The majority of these shorter holidays, over half (53%), involve the use of **serviced accommodation**. This is particularly so in Scotland (58%) and England (55%), but this type of accommodation is less dominant on holidays of this length in Northern Ireland (45%) and Wales (36%) - which are much more reliant on the camping and caravan sector
- They are more likely to be booked '**on spec**' rather than pre-visit – two in five (41%) are booked this way
- They are more likely to be **booked online** – close to one in three (32%) UK holidays of this length are booked using the internet
- They are more likely than longer holidays to be taken during the **first four months of the year** – 16% were taken between January-April. This reflects the large number of short holiday trips taken during the Easter holiday period of March and April
- They are more common during **October to December** (21%) reflecting the large increase in holiday trips during the Christmas holiday season
- They are more likely than longer trips to involve travel by train as the main form of transport (10%).

### Mid-length 4-7 night holidays...

*In many ways, UK holidays of 4-7 nights in length tend to fit the profile of a traditional seaside holiday. They are most likely to be taken at coastal locations with caravans, campsites and serviced accommodation being the most popular accommodation type. The peak summer months of July to September are when most of these holidays are taken. These holidays are popular among those aged 55 plus and among families and tend to have a larger party size than shorter 1-3 night breaks. Package/inclusive tours form a small but significant proportion of these holidays.*

### Key highlights

- 4-7 night holidays in the UK account for 17m trips, 95m nights and £4.6b spend per year. They account for a third (32%) of the total number of holiday trips, close to half (46%) of holiday nights and 40% of holiday spend. They therefore make up a relatively small share of the market compared to 1-3 night holidays, but are an important segment of the holiday market as they generate almost half of all holiday bed nights
- Holidays of this length have recorded greater growth than longer (8+ night) holidays in recent years. **Since 2006 they have increased by an average of +2% per annum**, driven by growth during 2007 (+4%) and 2009 (+16%)
- They are an important segment of the **holiday market in Wales** accounting for almost two in five (37%) of all holidays
- The majority of 4-7 night holidays in England are generated by English residents (91%). Also, (59%) of all holiday trips in Scotland by English visitors are 4-7 nights in length
- They are most prevalent among those **aged 55 plus years** (39%) and amongst **families** (37%). This is even more so in Scotland where 41% of all 4-7 night holidays are generated by those aged 55+
- They have, on average, the **largest party size** of all holiday trips (3.4 people). In Wales, close to half (46%) of 4-7 night holidays had a party size of four people or more, reflecting the popularity of Wales as a family holiday destination for holidays of this length
- Those from the less affluent **DE socio-economic group** are more likely to take a 4-7 night holiday – around one in five (21%)
- Unlike shorter 1-3 night holidays, they are much more likely, at a UK level, to be **taken at seaside/coastal locations** (46%). Within Scotland, this is less so with around one in five (22%) located on the coast, reflecting the competing claims of other areas of the country such as the Highlands. In contrast, 4-7 night holidays in Wales are most common at seaside locations (56%)
- **Camping and caravans** and **serviced accommodation** are the accommodation types used for three in five (61%) trips
- They are more likely to be **booked pre-visit** with two in three (66%) involving a firm booking. They are also more likely to be part of a **package/inclusive holiday** (12%)
- Close to half (47%) are taken during the peak summer months of **July to September**.

### Longer 8+ night holidays...

*Longer 8+ night holidays share many of the characteristics of shorter 4-7 night holidays. They tend to be taken at seaside locations during July to September, with caravan and campsites being the main accommodation types. Holidays of this length are more widespread in Scotland and Wales. In common with short 1-3 night breaks, they are more likely to be taken by visitors who fall into the more affluent AB socio-economic group. Those aged 55 plus and families form the main lifecycle stages for these types of holidays.*

### Key highlights

- These longer holidays account for 3.4m trips, 42m nights and £1.3b spend per year. They make up a much smaller share of the total number of holiday trips (6%), but account for one in five (21%) of holiday nights and 11% of holiday spend.
- Although these longer holidays account for the greatest average spend per trip (an average of £374), these trips tend to have a lower average spend per night compared to shorter trips
- In contrast to 1-3 and 4-7 night holidays, these longer holidays have recorded a **decrease of around -2% per annum in the number of trips since 2006**. The decrease is mainly the result of 2008 and 2010 when holidays of this length fell by -11% and -13% respectively. It is likely that the increase in popularity of shorter holidays (particularly 4-7 nights) and competition from UK residents taking holidays abroad have both contributed to these longer UK holidays decreasing over the last few years
- These longer trips are **more prevalent in Wales (8%) and Scotland (8%)** rather than England (6%) and Northern Ireland (4%)
- 71% of holidays within Scotland taken by English visitors are 8+ nights in length
- The South West of England is heavily reliant on these longer holidays where they account for a 44% share of the holiday market
- Similar to shorter 4-7 night holidays, they are most popular with those who are **aged 55 plus (41%) and families (39%)**. This is even more so in Wales where 46% of all 8+ night holidays are in the families lifecycle stage
- A **similar party size to 4-7 night holidays** with an average of 3.3 people per party
- More prevalent among those in the **AB social-economic group**. Over a third (35%) of these longer holidays are taken by this more affluent group reflecting their ability to afford longer holidays
- Extremely popular among **seaside locations in England (49%) and Wales (55%) and countryside/village locations for Scotland (45%)**
- **Caravans and campsites** are the dominant accommodation type on 43% of trips. In Wales, this is even more so accounting for a 56% share for 8+ night holidays



- 8+ night holidays have similar booking characteristics to 4-7 night holidays – three in five (60%) of all holidays **pre-booked**
- They are concentrated, even more so than 4-7 night holidays, on the peak tourism months of **July to September** with 63% taken during this period
- The car is even more dominant as the main mode of travel for longer 8+ night holidays (83%)

The next section looks at the volume and value of holiday trips within the UK.

### The Volume and Value of Holiday Tourism in the UK

Tables 2-1 to 2-5 below present the volume and value of the UK holiday market based on the three main tourism indicators; trips, nights and spend. The tables illustrate absolute volumes and values, initially based on a five years' average for trips taken during the 2006 – 2010 period, then for each year. The percentage change between the values for respective years has also been shown. The average nights per trip, spend per trip and spend per night have also been detailed.

The data in the report is based on data for 42,714 unweighted trips taken during the 2006 and 2010 period. When weighted and grossed up to the population, this equates to 276.1m trips taken during this time period resulting in an average of 55.2m trips per year. Trips of 1-3 nights in length were the most prevalent (34.4m per annum), with 4-7 night trips totalling 17.5m per annum and longer 8+ night trips averaging 3.4m. Reflecting this distribution, the average number of nights spent away on a typical domestic holiday was 3.7 nights; with spend averaging £212 per trip (or £57 per night). Shorter 1-3 night holidays are much higher spending than longer trips with a 'spend per night' figure of £86 compared to £30 for longer 8+ night trips.

Looking at trends over this period, there is a fluctuating pattern across the five years' period, the average annual change for holidays in the UK was +2%. Shorter 1-3 night holidays and mid-length 4-7 night holidays both increased by a similar amount of +2% per annum. In contrast, longer 8+ night holidays have recorded a decrease over the same period by an average of -2% per annum. The average spend per trip has remained consistent during the five years' period, increasing by an average of +1% per annum overall (in historic prices – not taking account of inflation). The increased growth in shorter 1-3 night (particularly in 2009) and 4-7 night holidays is likely to reflect a rise in the number of higher spending shorter trips to cities and large towns and a decline in longer, lower spending holidays in more rural/coastal locations where the accommodation and living costs tend to be lower.

On a year by year basis, the picture is more complex. When looking at the performance of each year for the UK as a whole (as illustrated in Table 2-1 overleaf), 2007 showed little growth compared to 2006 (trips increased by less than +1%) and then declined in 2008 (a fall of -3%), mainly due to a decrease

in longer trips. 2009 was the stand out year in terms of holiday trips, with an increase of +17% recorded. In particular, 1-3 night holidays featured a significant rise during 2009 of +18%.

In contrast, although there was a decline in holiday trips during 2010 (they decreased by -7% overall), the volumes recorded were still significantly higher than in the 2006 – 2008 period. Analysing the situation more closely, it was holiday trips of 4+ nights in length that contributed most to the decrease with 4-7 night holidays falling by -7% and longer 8+ night holidays by -13% (the lowest level recorded in the last five years). Shorter breaks (1-3 nights) also decreased compared to 2009 by -6%.

**Table 2-1 – Holiday Trips in the UK (millions) & % change**

	2006-2010 Average	2006	2007	% change (06-07)	2008	% change (07-08)	2009	% change (08-09)	2010	% change (09-10)	% annual avg. change 06-10
<b>Trips</b>	<b>55.235</b>	<b>53.264</b>	<b>53.722</b>	<b>+0.86%</b>	<b>51.958</b>	<b>-3.28%</b>	<b>60.657</b>	<b>+16.74%</b>	<b>56.576</b>	<b>-6.73%</b>	<b>+1.90%</b>
1-3 nights	34.397	33.203	32.838	-1.10%	32.286	-1.68%	37.939	+17.51%	35.720	-5.85%	+2.22%
4-7 nights	17.464	16.620	17.296	+4.07%	16.491	-4.65%	19.153	+16.14%	17.758	-7.28%	+2.07%
8+ nights	3.374	3.441	3.587	+4.24%	3.180	-11.35%	3.565	+12.11%	3.098	-13.10%	-2.02%
<b>Nights</b>	<b>203.920</b>	<b>197.271</b>	<b>203.869</b>	<b>+3.34%</b>	<b>193.145</b>	<b>-5.26%</b>	<b>222.473</b>	<b>+15.18%</b>	<b>202.841</b>	<b>-8.82%</b>	<b>+1.11%</b>
1-3 nights	67.006	64.325	64.473	+0.23%	63.361	-1.72%	73.668	+16.27%	69.202	-6.06%	+2.18%
4-7 nights	94.747	90.507	94.786	+4.73%	88.956	-6.15%	103.988	+16.90%	95.496	-8.17%	+1.83%
8+ nights	42.168	42.439	44.610	+5.12%	40.829	-8.48%	44.818	+9.77%	38.143	-14.89%	-2.12%
<b>Spend</b>	<b>£11,689</b>	<b>£10,906</b>	<b>£11,465</b>	<b>+5.13%</b>	<b>£11,388</b>	<b>-0.67%</b>	<b>£12,612</b>	<b>+10.75%</b>	<b>£12,072</b>	<b>-4.28%</b>	<b>+2.73%</b>
1-3 nights	£5,789	£5,298	£5,377	+1.49%	£5,866	+9.09%	£6,188	+5.49%	£6,215	+0.44%	+4.13%
4-7 nights	£4,636	£4,311	£4,732	+9.77%	£4,382	-7.40%	£5,052	+15.29%	£4,704	-6.89%	+2.69%
8+ nights	£1,264	£1,297	£1,357	+4.63%	£1,140	-15.99%	£1,372	+20.35%	£1,153	-15.96%	-1.74%
<b>Av. Nights per trip</b>	<b>3.69</b>	<b>3.70</b>	<b>3.79</b>	<b>+2.46%</b>	<b>3.72</b>	<b>-2.04%</b>	<b>3.67</b>	<b>-1.33%</b>	<b>3.59</b>	<b>-2.25%</b>	<b>-0.79%</b>
1-3 nights	1.95	1.94	1.96	+1.34%	1.96	-0.04%	1.94	-1.06%	1.94	-0.23%	0.00%
4-7 nights	5.43	5.45	5.48	+0.63%	5.39	-1.57%	5.43	+0.65%	5.38	-0.95%	-0.31%
8+ nights	12.50	12.33	12.44	+0.84%	12.84	+3.24%	12.57	-2.08%	12.31	-2.06%	-0.02%
<b>Av. Spend per trip</b>	<b>£212</b>	<b>£205</b>	<b>£213</b>	<b>+4.23%</b>	<b>£219</b>	<b>+2.70%</b>	<b>£208</b>	<b>-5.13%</b>	<b>£213</b>	<b>+2.62%</b>	<b>+1.10%</b>
1-3 nights	£168	£160	£164	+2.62%	£182	+10.96%	£163	-10.23%	£174	+6.68%	+2.51%
4-7 nights	£265	£259	£274	+5.48%	£266	-2.88%	£264	-0.73%	£265	+0.43%	+0.57%
8+ nights	£374	£377	£378	+0.37%	£358	-5.24%	£385	+7.35%	£372	-3.29%	-0.20%
<b>Av. Spend per night</b>	<b>£57</b>	<b>£55</b>	<b>£56</b>	<b>+1.72%</b>	<b>£59</b>	<b>+4.84%</b>	<b>£57</b>	<b>-3.85%</b>	<b>£60</b>	<b>+4.98%</b>	<b>+1.92%</b>
1-3 nights	£86	£82	£83	+1.26%	£93	+11.01%	£84	-9.27%	£90	+6.92%	+2.48%
4-7 nights	£49	£48	£50	+4.81%	£49	-1.33%	£49	-1.38%	£49	+1.39%	+0.87%
8+ nights	£30	£31	£30	-0.47%	£28	-8.21%	£31	+9.64%	£30	-1.26%	-0.07%

A pattern that is familiar throughout the report are the similarities between the profile of holidays in England when compared to the UK as a whole, reflecting the dominance of England as a destination within UK domestic tourism. Shorter 1-3 night and mid-length 4-7 night holidays both increased by an average of +3% per annum. In contrast, longer +8 night holidays decreased in growth, by -1% per annum.

On a year to year basis, all trip lengths in England have shown patterns of fluctuation similar to the UK, with little growth in 2007 and 2008 recording a fall in the number of holiday trips, particularly for 8+ night holidays which fell by -18%. 2009 was a much stronger year with significant growth recorded across all trip lengths, but noticeably for 8+ night holidays – these rose by +25%. 2010 was a different story however with a decline of -16% - back to around the same volume of trips recorded in 2008.

**Table 2-2 – Holiday Trips in England (millions) & % change**

	2006-2010 Average	2006	2007	% change (06-07)	2008	% change (07-08)	2009	% change (08-09)	2010	% change (09-10)	% annual avg. change 06-10
<b>Trips</b>	<b>42.712</b>	<b>40.665</b>	<b>41.631</b>	<b>+2.38%</b>	<b>40.046</b>	<b>-3.81%</b>	<b>47.293</b>	<b>+18.10%</b>	<b>43.927</b>	<b>-7.12%</b>	<b>+2.39%</b>
1-3 nights	26.968	25.716	25.773	+0.22%	25.364	-1.59%	29.896	+17.87%	28.093	-6.03%	+2.62%
4-7 nights	13.225	12.351	13.163	+6.57%	12.473	-5.24%	14.636	+17.34%	13.501	-7.75%	+2.73%
8+ nights	2.519	2.599	2.695	+3.69%	2.209	-18.03%	2.760	+24.94%	2.333	-15.47%	-1.22%
<b>Nights</b>	<b>152.873</b>	<b>146.475</b>	<b>152.462</b>	<b>+4.09%</b>	<b>142.694</b>	<b>-6.41%</b>	<b>169.538</b>	<b>+18.81%</b>	<b>153.194</b>	<b>-9.64%</b>	<b>+1.71%</b>
1-3 nights	51.866	49.038	49.682	+1.31%	49.123	-1.13%	57.51	+17.07%	53.979	-6.14%	+2.78%
4-7 nights	71.115	66.549	71.413	+7.31%	66.736	-6.55%	79.247	+18.75%	71.628	-9.61%	+2.47%
8+ nights	29.892	30.887	31.368	+1.56%	26.835	-14.45%	32.781	+22.16%	27.587	-15.84%	-1.65%
<b>Spend</b>	<b>£8,926</b>	<b>£8,212</b>	<b>£8,776</b>	<b>+6.87%</b>	<b>£8,654</b>	<b>-1.39%</b>	<b>£9,741</b>	<b>+12.56%</b>	<b>£9,248</b>	<b>-5.06%</b>	<b>+3.24%</b>
1-3 nights	£4,542	£4,129	£4,218	+2.16%	£4,651	+10.27%	£4,851	+4.30%	£4,862	+0.23%	+4.24%
4-7 nights	£3,488	£3,191	£3,603	+12.91%	£3,227	-10.44%	£3,836	+18.87%	£3,582	-6.62%	+3.68%
8+ nights	£896	£892	£955	+7.06%	£776	-18.74%	£1,054	+35.82%	£804	-23.72%	+0.11%
<b>Av. Nights per trip</b>	<b>3.58</b>	<b>3.60</b>	<b>3.66</b>	<b>+1.67%</b>	<b>3.56</b>	<b>-2.70%</b>	<b>3.58</b>	<b>+0.61%</b>	<b>3.49</b>	<b>-2.72%</b>	<b>-0.79%</b>
1-3 nights	1.92	1.91	1.93	+1.09%	1.94	+0.47%	1.92	-0.67%	1.92	-0.12%	+0.19%
4-7 nights	5.38	5.39	5.43	+0.69%	5.35	-1.38%	5.41	+1.20%	5.31	-2.02%	-0.38%
8+ nights	11.87	11.88	11.64	-2.06%	12.15	+4.37%	11.88	-2.23%	11.82	-0.44%	-0.09%
<b>Av. Spend per trip</b>	<b>£209</b>	<b>£202</b>	<b>£211</b>	<b>+4.39%</b>	<b>£216</b>	<b>+2.51%</b>	<b>£206</b>	<b>-4.69%</b>	<b>£211</b>	<b>+2.21%</b>	<b>+1.11%</b>
1-3 nights	£169	£161	£164	+1.93%	£183	+12.04%	£162	-11.51%	£173	+6.66%	+2.28%
4-7 nights	£264	£258	£274	+5.95%	£259	-5.48%	£262	+1.30%	£265	+1.23%	+0.75%
8+ nights	£355	£343	£354	+3.25%	£351	-0.87%	£382	+8.71%	£345	-9.76%	+0.33%
<b>Av. Spend per night</b>	<b>£58</b>	<b>£56</b>	<b>£58</b>	<b>+2.67%</b>	<b>£61</b>	<b>+5.36%</b>	<b>£57</b>	<b>-5.26%</b>	<b>£60</b>	<b>+5.07%</b>	<b>+1.96%</b>
1-3 nights	£88	£84	£85	+0.83%	£95	+11.52%	£84	-10.91%	£90	+6.78%	+2.06%
4-7 nights	£49	£48	£50	+5.22%	£48	-4.16%	£48	+0.11%	£50	+3.31%	+1.12%
8+ nights	£30	£29	£30	+5.42%	£29	-5.02%	£32	+11.19%	£29	-9.36%	+0.56%

Across the 2006-10 period, shorter 1-3 night and longer 8+ night holidays in Scotland have recorded the most growth rising by an average of +2% per annum. This only tells part of the story as, when viewed on a year by year basis, the number of trips of this length have fluctuated considerably. Following a significant increase in 2007 (+32%), 8+ night holidays decreased during 2008 (-12%) and 2010 (-18%).

Shorter 1-3 night holidays increased significantly during 2009 (+24%), one of the key factors being greater numbers of Scottish residents taking short breaks in their own country. All trip lengths declined by -16% in 2010 following a more challenging year for holiday tourism.

**Table 2-3 – Holiday Trips in Scotland (millions) & % change**

	2006-2010 Average	2006	2007	% change (06-07)	2008	% change (07-08)	2009	% change (08-09)	2010	% change (09-10)	% annual avg. change 06-10
<b>Trips</b>	<b>6.275</b>	<b>5.954</b>	<b>6.497</b>	<b>+9.12%</b>	<b>6.150</b>	<b>-5.34%</b>	<b>6.927</b>	<b>+12.63%</b>	<b>5.849</b>	<b>-15.56%</b>	<b>+0.21%</b>
1-3 nights	3.638	3.423	3.603	+5.26%	3.428	-4.86%	4.240	+23.69%	3.497	-17.52%	+1.64%
4-7 nights	2.133	2.088	2.311	+10.68%	2.209	-4.41%	2.149	-2.72%	1.910	-11.12%	-1.89%
8+ nights	0.504	0.443	0.583	+31.60%	0.513	-12.01%	0.538	+4.87%	0.441	-18.03%	+1.61%
<b>Nights</b>	<b>24.979</b>	<b>22.746</b>	<b>26.909</b>	<b>+18.30%</b>	<b>26.013</b>	<b>-3.33%</b>	<b>27.111</b>	<b>+4.22%</b>	<b>22.115</b>	<b>-18.43%</b>	<b>+0.19%</b>
1-3 nights	7.277	6.765	7.363	+8.84%	6.954	-5.55%	8.440	+21.37%	6.864	-18.67%	+1.50%
4-7 nights	11.342	10.642	12.454	+17.03%	11.881	-4.60%	11.646	-1.98%	10.088	-13.38%	-0.73%
8+ nights	6.359	5.339	7.091	+32.82%	7.178	+1.23%	7.026	-2.12%	5.162	-26.53%	+1.35%
<b>Spend</b>	<b>£1,562</b>	<b>£1,440</b>	<b>£1,592</b>	<b>+10.56%</b>	<b>£1,658</b>	<b>+4.15%</b>	<b>£1,641</b>	<b>-1.03%</b>	<b>£1,477</b>	<b>-9.99%</b>	<b>+0.92%</b>
1-3 nights	£702	£619	£672	+8.56%	£727	+8.18%	£791	+8.80%	£702	-11.25%	+3.57%
4-7 nights	£637	£588	£647	+10.03%	£733	+13.29%	£670	-8.59%	£548	-18.21%	-0.87%
8+ nights	£222	£233	£273	+17.17%	£197	-27.84%	£180	-8.63%	£228	+26.67%	+1.84%
<b>Av. Nights per trip</b>	<b>3.98</b>	<b>3.82</b>	<b>4.14</b>	<b>+8.41%</b>	<b>4.23</b>	<b>+2.12%</b>	<b>3.91</b>	<b>-7.47%</b>	<b>3.78</b>	<b>-3.39%</b>	<b>-0.08%</b>
1-3 nights	2.00	1.98	2.04	+3.40%	2.03	-0.73%	1.99	-1.87%	1.96	-1.39%	-0.15%
4-7 nights	5.31	5.10	5.39	+5.73%	5.38	-0.20%	5.42	+0.76%	5.28	-2.54%	+0.94%
8+ nights	12.59	12.05	12.16	+0.92%	13.99	+15.04%	13.06	-6.67%	11.71	-10.37%	-0.27%
<b>Av. Spend per trip</b>	<b>£249</b>	<b>£242</b>	<b>£245</b>	<b>+1.32%</b>	<b>£270</b>	<b>+10.02%</b>	<b>£237</b>	<b>-12.13%</b>	<b>£253</b>	<b>+6.59%</b>	<b>+1.45%</b>
1-3 nights	£193	£181	£187	+3.14%	£212	+13.71%	£187	-12.03%	£201	+7.60%	+3.10%
4-7 nights	£298	£282	£280	-0.58%	£332	+18.52%	£312	-6.04%	£287	-7.97%	+0.98%
8+ nights	£446	£526	£468	-10.97%	£384	-17.99%	£335	-12.88%	£517	+54.53%	+3.17%
<b>Av. Spend per night</b>	<b>£63</b>	<b>£63</b>	<b>£59</b>	<b>-6.55%</b>	<b>£64</b>	<b>+7.73%</b>	<b>£61</b>	<b>-5.03%</b>	<b>£67</b>	<b>+10.34%</b>	<b>+1.62%</b>
1-3 nights	£97	£92	£91	-0.25%	£105	+14.55%	£94	-10.35%	£102	+9.13%	+3.27%
4-7 nights	£56	£55	£52	-5.98%	£62	+18.76%	£58	-6.75%	£54	-5.58%	+0.11%
8+ nights	£36	£44	£38	-11.78%	£27	-28.71%	£26	-6.65%	£44	+72.41%	+6.31%

In contrast to England and Scotland, the number of holiday trips in Wales have declined slightly across the five years' period (-0.4% per annum). This has been driven by a decrease in the number of longer 8+ night holidays (an average of -6% per annum) whilst 1-3 night holidays have remained at a standstill – -0.2% per annum. In contrast, mid-length 4-7 night holidays have increased by +2% per annum, reflecting a significant increase of +31% in 2009.

On a year by year basis, the volume of holidays in Wales by trip length has varied with both shorter 1-3 night and mid-length 4-7 night holidays decreasing considerably during 2007 and then falling again during 2008, before increasing during 2009. In contrast, longer 8+ night holidays increased during 2008 (+5%) but fell significantly during 2009 (-25%). During 2010, 1-3 night holidays increased by +11% but 4-7 night and 8+ night holidays decreased by -6% and -2% respectively. This reflects the increased popularity of these shorter trips within Wales in the last couple of years.

**Table 2-4 – Tourism Holiday Trips in Wales (millions) & % change**

	2006-2010 Average	2006	2007	% change (06-07)	2008	% change (07-08)	2009	% change (08-09)	2010	% change (09-10)	% annual avg. change 06-10
<b>Trips</b>	<b>5.505</b>	<b>5.967</b>	<b>5.132</b>	<b>-13.99%</b>	<b>5.056</b>	<b>-1.48%</b>	<b>5.596</b>	<b>+10.68%</b>	<b>5.776</b>	<b>+3.22%</b>	<b>-0.39%</b>
1-3 nights	3.003	3.303	2.820	-14.62%	2.781	-1.38%	2.897	+4.17%	3.214	+10.94%	-0.22%
4-7 nights	2.054	2.174	1.828	-15.92%	1.767	-3.34%	2.316	+31.07%	2.187	-5.57%	+1.56%
8+ nights	0.448	0.490	0.484	-1.22%	0.507	+4.75%	0.383	-24.46%	0.375	-2.09%	-5.75%
<b>Nights</b>	<b>22.944</b>	<b>25.024</b>	<b>21.619</b>	<b>-13.61%</b>	<b>21.326</b>	<b>-1.36%</b>	<b>22.810</b>	<b>+6.96%</b>	<b>23.942</b>	<b>+4.96%</b>	<b>-0.76%</b>
1-3 nights	6.255	6.846	6.076	-11.25%	5.794	-4.64%	5.957	+2.81%	6.600	+10.79%	-0.57%
4-7 nights	11.279	12.266	9.888	-19.39%	9.395	-4.99%	12.456	+32.58%	12.392	-0.51%	+1.92%
8+ nights	5.410	5.911	5.655	-4.33%	6.137	+8.52%	4.396	-28.37%	4.949	+12.58%	-2.90%
<b>Spend</b>	<b>£981</b>	<b>£1,050</b>	<b>£919</b>	<b>-12.48%</b>	<b>£887</b>	<b>-3.48%</b>	<b>£997</b>	<b>+12.40%</b>	<b>£1,053</b>	<b>+5.62%</b>	<b>+0.51%</b>
1-3 nights	£394	£414	£385	-7.00%	£359	-6.75%	£364	+1.39%	£446	+22.53%	+2.54%
4-7 nights	£460	£492	£421	-14.43%	£378	-10.21%	£516	+36.51%	£494	-4.26%	+1.90%
8+ nights	£127	£144	£113	-21.53%	£150	+32.74%	£117	-22.00%	£113	-3.42%	-3.55%
<b>Av. Nights per trip</b>	<b>4.17</b>	<b>4.19</b>	<b>4.21</b>	<b>+0.45%</b>	<b>4.22</b>	<b>+0.13%</b>	<b>4.08</b>	<b>-3.36%</b>	<b>4.15</b>	<b>+1.69%</b>	<b>-0.27%</b>
1-3 nights	2.08	2.07	2.15	+3.95%	2.08	-3.30%	2.06	-1.30%	2.05	-0.13%	-0.20%
4-7 nights	5.48	5.64	5.41	-4.13%	5.32	-1.71%	5.38	+1.15%	5.67	+5.35%	+0.17%
8+ nights	12.11	12.06	11.68	-3.14%	12.10	+3.60%	11.48	-5.18%	13.20	+14.98%	+2.56%
<b>Av. Spend per trip</b>	<b>£178</b>	<b>£176</b>	<b>£179</b>	<b>+1.76%</b>	<b>£175</b>	<b>-2.03%</b>	<b>£178</b>	<b>+1.55%</b>	<b>£182</b>	<b>+2.33%</b>	<b>+0.90%</b>
1-3 nights	£131	£125	£137	+8.92%	£129	-5.45%	£126	-2.67%	£139	+10.44%	+2.81%
4-7 nights	£224	£226	£230	+1.77%	£214	-7.11%	£223	+4.15%	£226	+1.38%	+0.05%
8+ nights	£286	£294	£233	-20.55%	£296	+26.72%	£305	+3.25%	£301	-1.36%	+2.02%
<b>Av. Spend per night</b>	<b>£43</b>	<b>£42</b>	<b>£43</b>	<b>+1.31%</b>	<b>£42</b>	<b>-2.16%</b>	<b>£44</b>	<b>+5.09%</b>	<b>£44</b>	<b>+0.62%</b>	<b>+1.22%</b>
1-3 nights	£63	£60	£63	+4.78%	£62	-2.21%	£61	-1.38%	£68	+10.59%	+2.94%
4-7 nights	£41	£40	£43	+6.15%	£40	-5.50%	£41	+2.96%	£40	-3.77%	-0.04%
8+ nights	£24	£24	£20	-17.98%	£24	+22.32%	£27	+8.89%	£23	-14.21%	-0.24%

In Northern Ireland, holiday trips have increased by an average of +6% per annum across the five years' period.

The main growth recently has been an increase in mid-length 4-7 night holidays; these holidays increased significantly by +92% in 2010 after a -22% decline the previous year in 2009. This appears to have been at the expense of longer 8+ night holidays which declined by -7% during 2010. These longer holidays have been in long term decline since 2006, declining by -3% per annum.

**Table 2-5 – Tourism Holiday Trips in Northern Ireland (millions) & % change**

	2006-2010 Average	2006	2007	% change (06-07)	2008	% change (07-08)	2009	% change (08-09)	2010	% change (09-10)	% annual avg. change 06-10
<b>Trips</b>	<b>1.078</b>	<b>1.047</b>	<b>0.905</b>	<b>-13.56%</b>	<b>1.023</b>	<b>+13.04%</b>	<b>1.119</b>	<b>+9.38%</b>	<b>1.294</b>	<b>+15.64%</b>	<b>+6.12%</b>
1-3 nights	0.844	0.824	0.682	-17.23%	0.797	+16.86%	0.934	+17.19%	0.982	+5.14%	+5.49%
4-7 nights	0.188	0.174	0.177	+1.72%	0.180	+1.69%	0.140	-22.22%	0.269	+92.14%	+18.33%
8+ nights	0.046	0.049	0.046	-6.12%	0.046	0.00%	0.046	0.00%	0.043	-6.52%	-3.16%
<b>Nights</b>	<b>3.125</b>	<b>3.027</b>	<b>2.880</b>	<b>-4.86%</b>	<b>3.112</b>	<b>+8.06%</b>	<b>3.014</b>	<b>-3.15%</b>	<b>3.590</b>	<b>+19.11%</b>	<b>+4.79%</b>
1-3 nights	1.608	1.676	1.353	-19.27%	1.490	+10.13%	1.761	+18.19%	1.758	-0.17%	+2.22%
4-7 nights	1.010	1.050	1.032	-1.71%	0.943	-8.62%	0.638	-32.34%	1.388	+117.55%	+18.72%
8+ nights	0.507	0.302	0.496	+64.24%	0.678	+36.69%	0.615	-9.29%	0.444	-27.80%	+15.96%
<b>Spend</b>	<b>£220</b>	<b>£204</b>	<b>£179</b>	<b>-12.25%</b>	<b>£189</b>	<b>+5.59%</b>	<b>£233</b>	<b>+23.28%</b>	<b>£294</b>	<b>+26.18%</b>	<b>+10.70%</b>
1-3 nights	£150	£136	£102	-25.00%	£128	+25.49%	£181	+41.41%	£205	+13.26%	+13.79%
4-7 nights	£51	£40	£60	+50.00%	£45	-25.00%	£30	-33.33%	£80	+166.67%	+39.58%
8+ nights	£18	£28	£17	-39.29%	£16	-5.88%	£22	+37.50%	£9	-59.09%	-16.69%
<b>Av. Nights per trip</b>	<b>2.92</b>	<b>2.89</b>	<b>3.18</b>	<b>+10.07%</b>	<b>3.04</b>	<b>-4.41%</b>	<b>2.69</b>	<b>-11.46%</b>	<b>2.77</b>	<b>+3.00%</b>	<b>-0.70%</b>
1-3 nights	1.91	2.03	1.98	-2.46%	1.87	-5.76%	1.89	+0.85%	1.79	-5.05%	-3.11%
4-7 nights	5.36	6.03	5.83	-3.38%	5.24	-10.15%	4.56	-13.01%	5.16	+13.23%	-3.33%
8+ nights	11.08	6.16	10.78	+74.95%	14.74	+36.69%	13.37	-9.29%	10.33	-22.77%	+19.90%
<b>Av. Spend per trip</b>	<b>£203</b>	<b>£195</b>	<b>£198</b>	<b>+1.51%</b>	<b>£185</b>	<b>-6.59%</b>	<b>£208</b>	<b>+12.70%</b>	<b>£227</b>	<b>+9.12%</b>	<b>+4.19%</b>
1-3 nights	£176	£165	£150	-9.38%	£161	+7.38%	£194	+20.66%	£209	+7.72%	+6.60%
4-7 nights	£266	£230	£339	+47.46%	£250	-26.25%	£214	-14.29%	£297	+38.79%	+11.43%
8+ nights	£395	£571	£370	-35.33%	£348	-5.88%	£478	+37.50%	£209	-56.24%	-14.99%
<b>Av. Spend per night</b>	<b>£70</b>	<b>£67</b>	<b>£62</b>	<b>-7.78%</b>	<b>£61</b>	<b>-2.28%</b>	<b>£77</b>	<b>+27.29%</b>	<b>£82</b>	<b>+5.94%</b>	<b>+5.79%</b>
1-3 nights	£92	£81	£75	-7.10%	£86	+13.95%	£103	+19.65%	£117	+13.45%	+9.99%
4-7 nights	£50	£38	£58	+52.62%	£48	-17.92%	£47	-1.46%	£58	+22.57%	+13.95%
8+ nights	£41	£93	£34	-63.03%	£24	-31.15%	£36	+51.59%	£20	-43.34%	-21.48%

### 3. Tourism Destinations

This section looks in detail at holiday tourism within the UK and contrasts the performance of England, Scotland, Wales and Northern Ireland as destinations. Table 3-1 below examines the percentage share by destination, initially at a combined (average) for the 2006 to 2010 period and then for each individual year.

- Overall, England accounts for just over 3 out of 4 holiday trips (77%) with Scotland accounting for just over 1 in 10 (11%). Wales' share is 10% and Northern Ireland's share equals 2%
- The overall share of UK holidays of each length are fairly consistent across the five years' period

Table 3-2 examines the share of these trips within each country destination.

**Table 3-1 - Destination of Trip – (% share by destination – 06-10 data)**

	2006-10	2006	2007	2008	2009	2010
<b>England</b>	<b>77%</b>	<b>76%</b>	<b>77%</b>	<b>77%</b>	<b>78%</b>	<b>78%</b>
1-3 nights	78%	77%	78%	79%	79%	79%
4-7 nights	76%	74%	76%	76%	76%	76%
8+ nights	75%	76%	75%	69%	77%	75%
<b>Scotland</b>	<b>11%</b>	<b>11%</b>	<b>12%</b>	<b>12%</b>	<b>11%</b>	<b>10%</b>
1-3 nights	11%	10%	11%	11%	11%	10%
4-7 nights	12%	13%	13%	13%	11%	11%
8+ nights	15%	13%	16%	16%	15%	14%
<b>Wales</b>	<b>10%</b>	<b>11%</b>	<b>10%</b>	<b>10%</b>	<b>9%</b>	<b>10%</b>
1-3 nights	9%	10%	9%	9%	8%	9%
4-7 nights	12%	13%	11%	11%	12%	12%
8+ nights	13%	14%	13%	16%	11%	12%
<b>NI</b>	<b>2%</b>	<b>2%</b>	<b>2%</b>	<b>2%</b>	<b>2%</b>	<b>2%</b>
1-3 nights	2%	2%	2%	2%	2%	3%
4-7 nights	1%	1%	1%	1%	1%	2%
8+ nights	1%	1%	1%	1%	1%	1%



Table 3-2 overleaf presents the percentage share based on trip length within each destination, initially at a combined average for the 2006 to 2010 period and then for each year.

- Just over two in three (63%) holidays in England are 1-3 nights in length with around one in three (31%) 4-7 nights in length. Longer 8+ night holidays account for a smaller, but significant, 6% share. The share of holidays by trip length in England has remained consistent across the five years' period
- In Scotland, holiday trips tend to be longer. Close to two in five (58%) holidays are 1-3 nights in length with a third (34%) lasting 4-7 nights. The picture is more varied in Scotland however with the share of 1-3 night holidays fluctuating between 55% in 2007 to 61% in 2009. Also, 4-7 night holidays decreased from 36% to 31% during 2009 following three years at 35-36%
- Even though the share of 1-3 night holidays has increased in Scotland to 61% in 2009, holidays tend to be longer in duration than in England with 8+ night holidays accounting for an 8% share compared to 6% for England
- As in Scotland, holidays in Wales tend to be longer than those in England. Close to two in five (37%) holidays in Wales are between 4-7 nights in length. Some 8% are longer 8+ night holidays. Wales has a lower percentage share of 1-3 night holidays when compared to England (55% vs. 63%) but a larger percentage of 4-7 night holidays (37% vs. 31%) and 8+ night holidays (8% vs. 6%)
- Holidays in Northern Ireland are much shorter; they are dominated by shorter 1-3 night trips. Close to eight out of ten (78%) holidays in the Province are of this length.

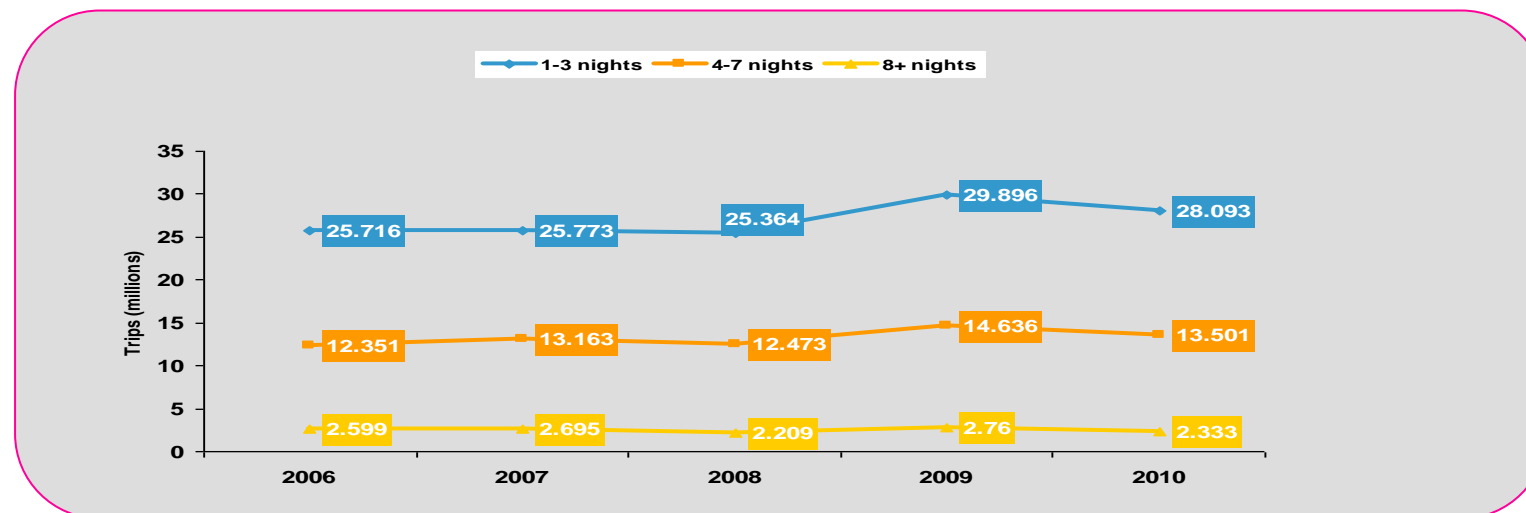
Table 3-2 - Destination of Trip – (% share by holiday length – 06-10 data)

	2006-10	2006	2007	2008	2009	2010
<b>England</b>						
1-3 nights	63%	63%	62%	63%	63%	64%
4-7 nights	31%	30%	32%	31%	31%	31%
8+ nights	6%	6%	6%	6%	6%	5%
<b>Scotland</b>						
1-3 nights	58%	57%	55%	56%	61%	60%
4-7 nights	34%	35%	36%	36%	31%	33%
8+ nights	8%	7%	9%	8%	8%	8%
<b>Wales</b>						
1-3 nights	55%	55%	55%	55%	52%	56%
4-7 nights	37%	36%	36%	35%	41%	38%
8+ nights	8%	8%	9%	10%	7%	6%
<b>NI</b>						
1-3 nights	78%	79%	75%	78%	83%	76%
4-7 nights	17%	17%	20%	18%	13%	21%
8+ nights	4%	5%	5%	4%	4%	3%

### Chart 3-1 - Number of holiday trips in England by trip length - 2006 to 2010 (millions)

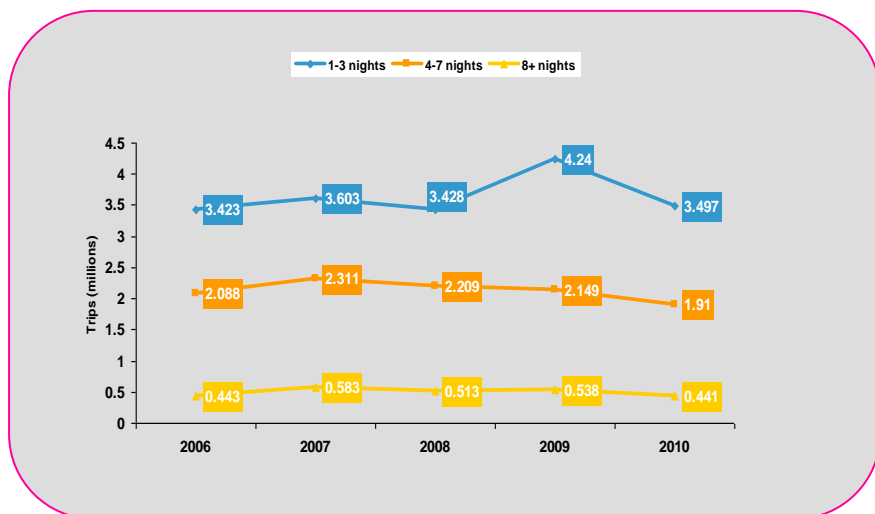
Charts 3-1 to 3-3 below and overleaf present the number of holidays (in millions) by trip length for England, Scotland and Wales. The sample size for trips to Northern Ireland, although robust when analysed based on five years' cumulative data, is not large enough to present at a yearly level.

### Chart 3-1 - Number of holiday trips in England by trip length - 2006 to 2010 (millions)



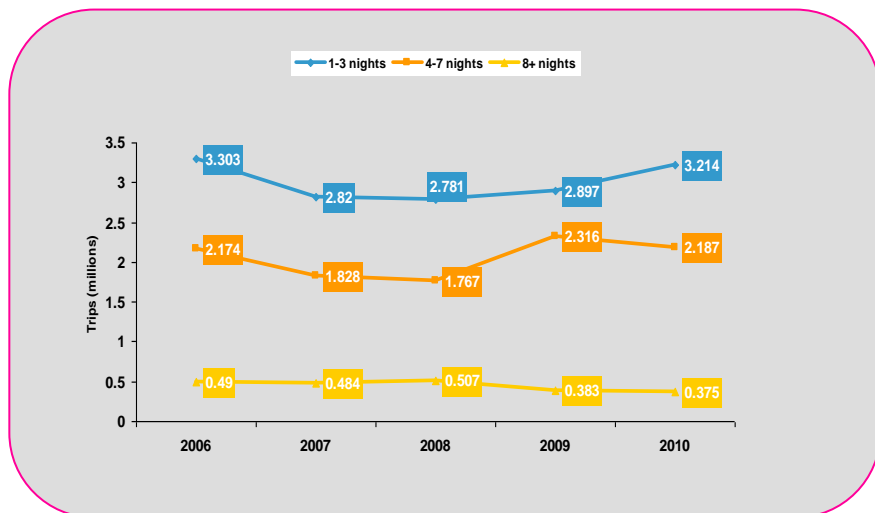
- 1-3 night holiday trips have increased from 25.7m in 2006 to 28.1m in 2010 (a rise of +9%)
- 4-7 night holidays have increased by +9% over the same time period (from 12.4m to 13.5m)
- 8+ night holidays have varied across the five year period ranging from between 2.2m – 2.8m

**Chart 3-2 - Number of holiday trips in Scotland by trip length - 2006 to 2010 (millions)**



- 1-3 night holidays in Scotland remained at a consistent volume during 2006 to 2008 but then increased by +24% in 2009 to 4.2m before returning to 2006 – 2008 levels in 2010
- This was driven by an increase in Scottish residents taking more short trips during 2009 (see chart 4-2 below)
- 4-7 and 8+ night holidays remained constant during 2006 – 2009. Both recorded a decline in 2010 however.

**Chart 3-3 - Number of holiday trips in Wales by trip length - 2006 to 2010 (millions)**



- The different holiday trip lengths in Wales have shown consistent trends across the five years, with a decrease during 2007 (following a strong 2006) and a rise back to 2006 levels during 2010 (except for 8+ night holidays) which have declined since 2008.

## 4. Origin & Destination of Trips

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So far, this report has looked at the destination of trips. This section now adds a further dimension - the origin of trips. Table 4-1 overleaf illustrates the percentage share by destination based on the origin of holiday visitors.

- Holiday trips taken in England were dominated by English residents (91%). The much larger population size of England in relation to the other countries in the UK accounts for England's pre-eminent position as a domestic tourism generator for the other parts of the UK: 77% of holiday visitors to Wales were from England, as were just under half of holiday trips made in Scotland (45%) but decreasing to one in five holiday trips to Northern Ireland (21%)
- The majority of 4-7 night and 8+ night holidays in Scotland were taken by English visitors who accounted for 59% and 71% of these trips respectively. The majority of shorter 1-3 night holidays are taken by Scottish residents (62%)
- As mentioned above, holidays by English visitors are a major component of the holiday market in Wales with close to nine out of ten (88%) longer 8+ night holidays generated by English visitors
- More than a quarter (27%) of 1-3 night holiday trips in Wales were generated by Welsh residents
- 1-3 night holidays within Northern Ireland were predominantly taken by Northern Irish residents (81%). Around three in five (58%) of the longer 8+ night holidays were generated by English visitors.

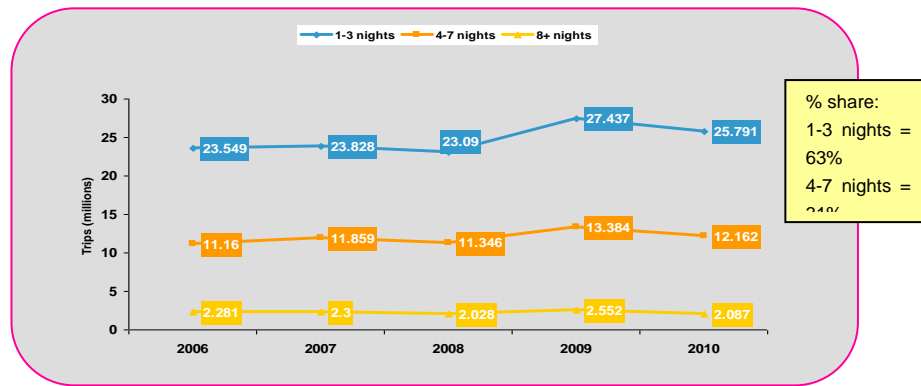
Table 4-1 - Destination of Trip by Origin – (% share by destination – 2006-2010 data)

	Residents of.....				
	UK	England	Scotland	Wales	Northern Ireland
<b>UK</b>	<b>100%</b>	<b>83%</b>	<b>9%</b>	<b>6%</b>	<b>2%</b>
1-3 nights	100%	82%	9%	6%	3%
4-7 nights	100%	85%	8%	5%	1%
8+ nights	100%	86%	8%	4%	1%
<b>England</b>	<b>100%</b>	<b>91%</b>	<b>4%</b>	<b>4%</b>	<b>1%</b>
1-3 nights	100%	92%	3%	4%	1%
4-7 nights	100%	91%	4%	4%	1%
8+ nights	100%	89%	5%	4%	1%
<b>Scotland</b>	<b>100%</b>	<b>45%</b>	<b>50%</b>	<b>1%</b>	<b>3%</b>
1-3 nights	100%	33%	62%	1%	4%
4-7 nights	100%	59%	36%	2%	3%
8+ nights	100%	71%	26%	2%	1%
<b>Wales</b>	<b>100%</b>	<b>77%</b>	<b>1%</b>	<b>21%</b>	<b>*</b>
1-3 nights	100%	72%	1%	27%	*
4-7 nights	100%	82%	1%	16%	1%
8+ nights	100%	88%	1%	10%	1%
<b>NI</b>	<b>100%</b>	<b>21%</b>	<b>6%</b>	<b>1%</b>	<b>73%</b>
1-3 nights	100%	14%	4%	*	81%
4-7 nights	100%	42%	8%	2%	48%
8+ nights	100%	58%	24%	-	18%

\* = less than 0.5%

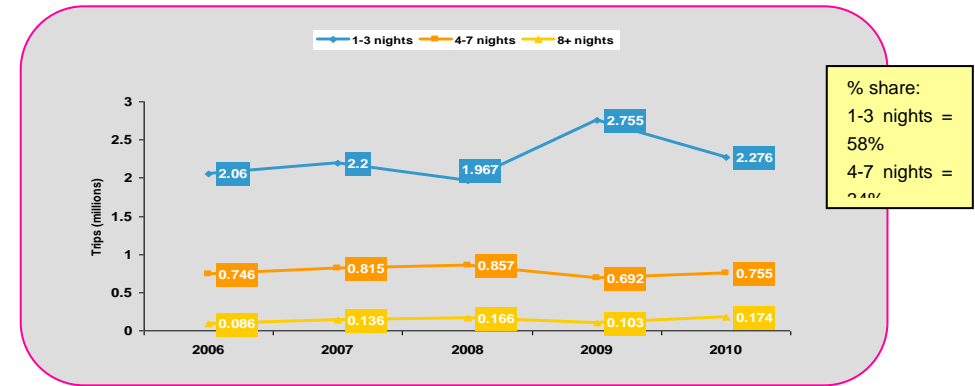
Charts 4-1 to 4-6 overleaf analyse the relationship between the country of origin and the country of destination between 2006 and 2010. The focus is on the destinations' own domestic markets (e.g. Scottish residents on holiday in Scotland), but we have also added, for Scotland and Wales, trends in visits by English residents as they represent a significant element of the market.

Chart 4-1 - Holiday trips in England by English residents - by trip length (millions) – 06 to 10



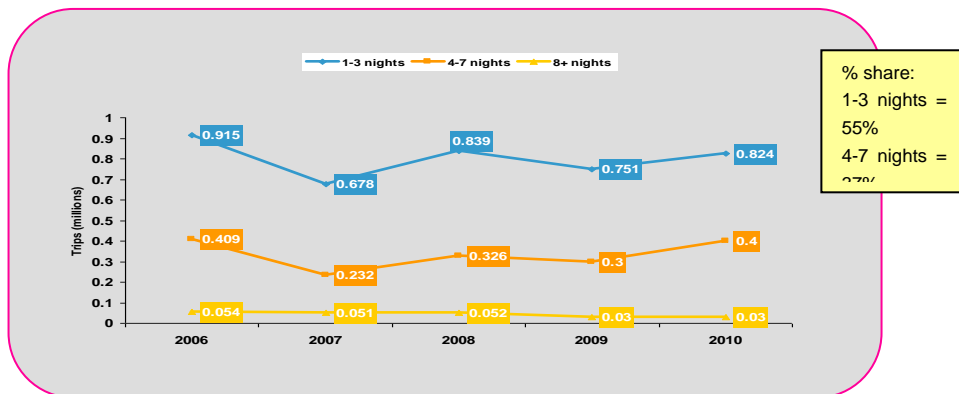
- Holiday trips in England by English residents recorded significant increases in 2009 – this followed three years where the figures remained relatively stable. This increase reflected a greater localisation of holidays during 2009. 2010 could not match 2009 but still recorded a greater number of trips than the 2006 – 2008 period, except for 8+ night trips which fell back to 2008 levels.
- Almost a third (31%) of English holidays by English residents are 4-7 nights in length

Chart 4-2 - Holiday trips in Scotland by Scottish residents - by trip length (millions) –06 - 10



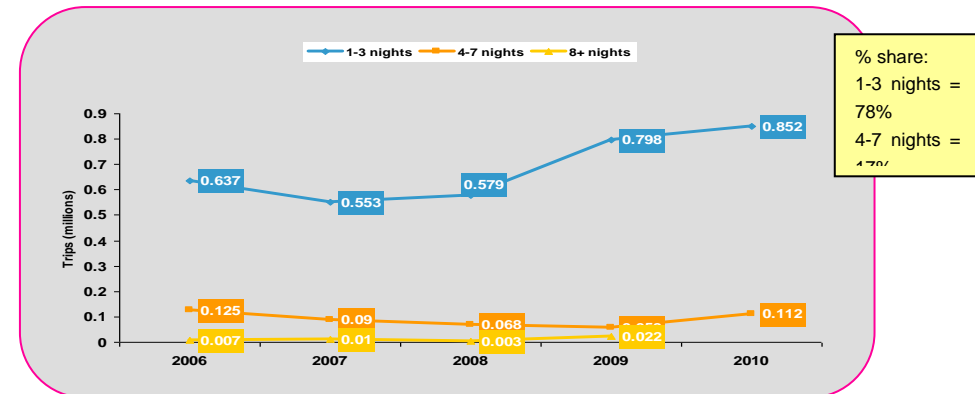
- 1-3 night holidays in Scotland taken by Scottish residents increased significantly from 2.0m in 2008 to 2.8m in 2009 – an increase of +40%. These types of holidays decreased to 2.3m during 2010, back to 2007 levels.
- 4-7 and 8+ night holidays recorded a decline in trips over the same time period (down -19% and -38% respectively)
- Scottish holidays by Scottish residents tend to be 1-3 nights in length (58%)

Chart 4-3 - Holiday trips in Wales by Welsh residents - by trip length (millions) – 06 to 10



- The level of 1-3 and 4-7 night holiday trips taken in Wales by Welsh residents have fluctuated over the period with 2006 remaining the strongest year
- 8+ night holidays have been more consistent remaining at 0.05m between 2006 and 2008 before falling to 0.03m in 2009 and 2010
- The Welsh holiday market for Welsh residents is very similar to Scotland's domestic market with a similar share by trip length – 1-3 night holidays account for a 55% share of the market

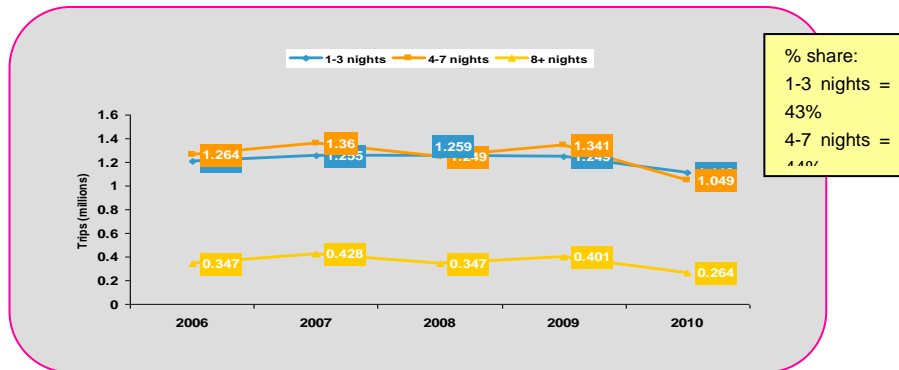
Chart 4-4 - Holiday trips in NI by NI residents - by trip length (millions) – 06 to 10



- The majority of holiday trips taken in Northern Ireland by Northern Irish residents are shorter holidays of 1-3 nights in length. These reported a sharp increase between 2008 (0.6m) and 2009 (0.8m) of +38%. They recorded a further increase in 2010 to 0.9m (+7%)
- Northern Ireland's holiday market by Northern Irish residents is dominated by short 1-3 night holidays with almost nine out of ten (78%) being of this length

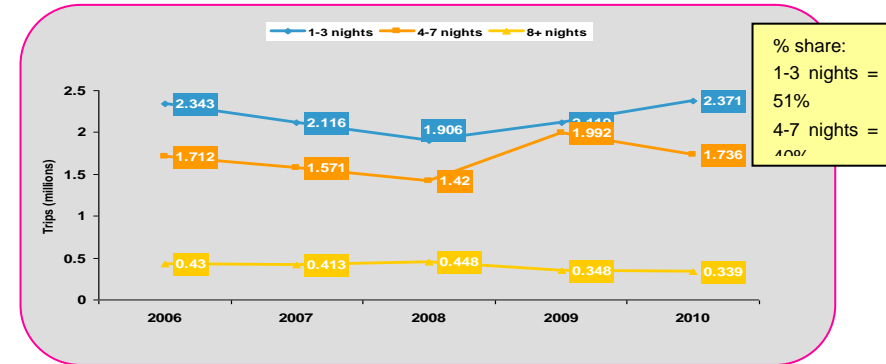


Chart 4-5 - Holiday trips in Scotland by English residents - by trip length (millions) – 06 to 10



- Holiday trips in Scotland by English visitors had remained relatively consistent between 2006 – 2009 with 1-3 and 4-7 night holidays being the most prevalent
- Visitors from England account for 13% of longer 8+ night holidays in Scotland
- During 2010, holidays of all trip lengths declined compared to 2009.

Chart 4-6 - Holiday trips in Wales by English residents - by trip length (millions) – 06 to 10



- 1-3 night holiday trips in Wales by English visitors decreased from 2.3m in 2006 to 1.9m in 2008, before increasing by +24% in 2010 to 2.4m
- 4-7 night holidays recorded a large increase of +40% between 2008 and 2009
- Half of all holiday trips in Wales by visitors from England are 1-3 nights in length with a further two in five (40%) being 4-7 nights in length

Please note that we have not been able to illustrate Northern Ireland analysis due to low sample size

The larger sample size for holiday trips in England has enabled analysis at a regional level. Table 4-2 below illustrates the percentage share based on the nine Regional Development Agency (RDA) regions.

- 1-3 night trips are particularly important to the tourism market within the capital with London accounting for 11% of trips of this length compared to 3% for both 4-7 night and 8+ night trips
- In contrast, the South West (which accounts for the largest share of holiday trips – 26%) is much more reliant on longer 8+ night holidays (44%) rather than shorter trips (1-3 night holidays – 19%)

**Table 4-2 - English regions visited by trip length – (2006-2010 data) %**

	All	1-3 nights	4-7 nights	8+ nights
<b>England</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
West Midlands	6%	7%	4%	5%
East	9%	8%	10%	11%
East Midlands	8%	8%	8%	8%
London	8%	11%	3%	3%
North West	16%	17%	14%	13%
North East	4%	4%	3%	5%
South East	15%	15%	13%	15%
South West	26%	19%	37%	44%
Yorkshire	11%	11%	10%	9%

## 5. Demographics

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### Lifecycle

This section looks at the different lifecycle stages and how their pattern of holidays varies by destination and trip length. There are clear trends at a UK and country level when analysing holiday trip length by the different lifecycle stages. Around four out of ten (41%) 1-3 night holidays tend to be taken by those aged under 55 with no children in the household. Longer 4-7 and 8+ night holidays are more likely however to be taken by those aged over 55 (39% and 41% respectively) and families (37% and 39% respectively).

At a country level, notable variations are that:

- Longer 4-7 and 8+ night holidays in Scotland are more likely to be taken by those aged 35-54 with no children (19% and 18% respectively)
- In Wales, close to two in five (37%) 8+ night holidays are generated by older families (those aged 35-54 with children)
- In Northern Ireland, 16% of 8+ night holidays are taken by younger families (16-34 with children)

When looking at the demographic breakdown of UK holidays, those from black or minority ethnic (BME) population groups (11%) and those in full-time employment (69%) tend to form a larger proportion of the shorter 1-3 night holiday market. Longer 8+ night holidays on the other hand are more likely to be taken by those who are white (93%) and married (77%).

Table 5-1 – Lifecycle stage - (2006-2010 data %)

Lifecycle						
	16-34, unmarried, no kids	16-34, married, no kids	16-34, with kids	35-54 no kids	35-54 with kids	55+
<b>UK</b>	<b>11%</b>	<b>5%</b>	<b>9%</b>	<b>19%</b>	<b>26%</b>	<b>30%</b>
1-3 nights	13%	7%	9%	21%	25%	25%
4-7 nights	7%	3%	11%	14%	26%	39%
8+ nights	5%	2%	8%	12%	31%	41%
<b>England</b>	<b>11%</b>	<b>5%</b>	<b>10%</b>	<b>18%</b>	<b>26%</b>	<b>30%</b>
1-3 nights	13%	7%	9%	21%	25%	25%
4-7 nights	7%	3%	11%	14%	26%	39%
8+ nights	5%	2%	7%	12%	32%	42%
<b>Scotland</b>	<b>11%</b>	<b>6%</b>	<b>8%</b>	<b>21%</b>	<b>23%</b>	<b>32%</b>
1-3 nights	13%	7%	8%	23%	24%	25%
4-7 nights	7%	5%	7%	19%	21%	41%
8+ nights	3%	4%	7%	18%	27%	40%
<b>Wales</b>	<b>10%</b>	<b>5%</b>	<b>9%</b>	<b>18%</b>	<b>29%</b>	<b>30%</b>
1-3 nights	12%	7%	8%	22%	27%	23%
4-7 nights	7%	2%	11%	14%	29%	37%
8+ nights	5%	2%	9%	9%	37%	38%
<b>Northern Ireland</b>	<b>13%</b>	<b>6%</b>	<b>11%</b>	<b>20%</b>	<b>27%</b>	<b>23%</b>
1-3 nights	14%	7%	10%	21%	27%	21%
4-7 nights	10%	3%	13%	18%	26%	30%
8+ nights	7%	-	16%	15%	24%	38%

## Party Size

This section looks at the party size of holiday trips in the UK. Table 5-2 overleaf presents both the percentage share by party size as well as the average party size.

The average party size for the three types of holiday trips is around three people per party. This is accounted for by two clear categories – those travelling in a party of two and those with a larger party size of four (a large proportion of whom are likely to be families).

When looking at UK holiday trips as a whole and by individual country destination, there is a clear trend towards shorter 1-3 night holidays being made by a parties of less than three people (on average, 2.9 people), and longer 4-7 night and 8+ night trips being made by larger parties (on average, 3.4 people for 4-7 night holidays and 3.3 people for 8+ night holidays). As mentioned above, this is a reflection of a larger number of couples without children taking shorter breaks and families taking longer holidays.

Notable variations at a country level are that:

- Holidays in England match the overall profile of UK trips
- Holiday trips in Scotland tend to have smaller party sizes than the UK average for longer 4-7 and 8+ night holidays. This reflects more longer holiday trips in Scotland being taken by couples
- Holidays in Wales tend to have larger party sizes for all trip lengths (3.3 on average). This is particularly the case for 4-7 night holidays, reflecting the popularity of Wales as a family holiday destination
- Holidays in Northern Ireland tend to consist of smaller party sizes, similar to holidays in Scotland in this respect.

Table 5-2 - Party size – (2006-2010 data %)

Party Size							
	1	2	3	4	5	6+	Avg. party size
<b>UK</b>	<b>11%</b>	<b>40%</b>	<b>12%</b>	<b>20%</b>	<b>7%</b>	<b>6%</b>	<b>3.1</b>
1-3 nights	13%	44%	11%	18%	6%	4%	2.9
4-7 nights	8%	35%	13%	22%	10%	9%	3.4
8+ nights	9%	34%	12%	25%	10%	9%	3.3
<b>England</b>	<b>11%</b>	<b>40%</b>	<b>12%</b>	<b>20%</b>	<b>7%</b>	<b>6%</b>	<b>3.1</b>
1-3 nights	13%	44%	11%	19%	6%	4%	2.9
4-7 nights	8%	35%	13%	23%	10%	9%	3.4
8+ nights	9%	34%	11%	25%	10%	9%	3.3
<b>Scotland</b>	<b>12%</b>	<b>44%</b>	<b>12%</b>	<b>18%</b>	<b>6%</b>	<b>5%</b>	<b>3.0</b>
1-3 nights	14%	45%	12%	17%	6%	4%	2.9
4-7 nights	9%	42%	12%	18%	7%	7%	3.1
8+ nights	9%	40%	14%	20%	8%	6%	3.1
<b>Wales</b>	<b>8%</b>	<b>36%</b>	<b>14%</b>	<b>21%</b>	<b>10%</b>	<b>8%</b>	<b>3.3</b>
1-3 nights	10%	40%	13%	19%	9%	5%	3.1
4-7 nights	6%	31%	14%	22%	13%	11%	3.5
8+ nights	5%	32%	13%	30%	9%	9%	3.4
<b>Northern Ireland</b>	<b>12%</b>	<b>41%</b>	<b>11%</b>	<b>19%</b>	<b>11%</b>	<b>4%</b>	<b>3.0</b>
1-3 nights	11%	43%	10%	17%	11%	4%	3.0
4-7 nights	13%	35%	13%	24%	8%	6%	3.1
8+ nights	11%	31%	17%	22%	13%	3%	3.2

## Social Class

This section looks at the holiday characteristics based on socio-economic groupings. Unsurprisingly, holiday trips of all lengths in the UK tend to be taken by those in the more affluent AB and C1 socio-economic groups.

In the UK, two in three (66%) of shorter 1-3 night holidays are taken by those in the AB (34%) and C1 (32%) socio-economic groups with a larger proportion of 4-7 night holidays taken by those in the DE socio-economic groups (21%). 8+ night holidays are more prevalent among those in the AB socio-economic group (35%).

Notable variations at a country level are that:

- A large proportion of 8+ night holidays in Scotland are taken by those in the AB socio-economic group (44%). This is likely to reflect that a holiday in Scotland can involve a greater distance to travel for many and so those in the AB groups are more likely to be able to afford such a trip
- In Wales, a larger proportion of those from the DE socio-economic group (who are less likely to take a holiday overall) take 4-7 night holidays (21%), and longer 8+ night holidays are taken by larger proportions of those from the AB socio-economic group (37%)

Table 5-3 - Social Class – (2006-2010 data %)

Social Class				
	AB	C1	C2	DE
<b>UK Adult Population</b>	20%	30%	21%	30%
<b>UK</b>	<b>33%</b>	<b>31%</b>	<b>19%</b>	<b>17%</b>
1-3 nights	34%	32%	19%	15%
4-7 nights	30%	30%	19%	21%
8+ nights	35%	26%	20%	18%
<b>England</b>	<b>33%</b>	<b>31%</b>	<b>19%</b>	<b>17%</b>
1-3 nights	35%	32%	19%	14%
4-7 nights	30%	30%	20%	21%
8+ nights	35%	25%	21%	19%
<b>Scotland</b>	<b>34%</b>	<b>31%</b>	<b>19%</b>	<b>17%</b>
1-3 nights	32%	32%	20%	16%
4-7 nights	34%	30%	18%	18%
8+ nights	44%	25%	16%	14%
<b>Wales</b>	<b>31%</b>	<b>32%</b>	<b>19%</b>	<b>18%</b>
1-3 nights	32%	33%	19%	16%
4-7 nights	29%	31%	19%	21%
8+ nights	37%	31%	15%	17%
<b>Northern Ireland</b>	<b>32%</b>	<b>26%</b>	<b>19%</b>	<b>23%</b>
1-3 nights	32%	26%	19%	23%
4-7 nights	37%	25%	15%	23%
8+ nights	19%	32%	24%	24%



## 6. Types of Location Visited

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This section looks at the different types of location visited on holiday. Table 6-1 overleaf presents key findings for each of four separate destination types: seaside and coastal locations, large cities and towns, small towns and countryside and villages.

The coastline is an important asset for holidays, with around one in three holidays (34%) taken at seaside/coastal locations. A quarter (26%) involve a trip to a city or large town. At a UK level, there are clear trends with 1-3 night holidays more likely to be taken in large cities and towns (33%), reflecting the popularity of short city breaks, and longer 4-7 and 8+ night holidays more likely to be taken at the seaside/coast (46% for 4-7 night and 47% for 8+ night holidays)

At a country level:

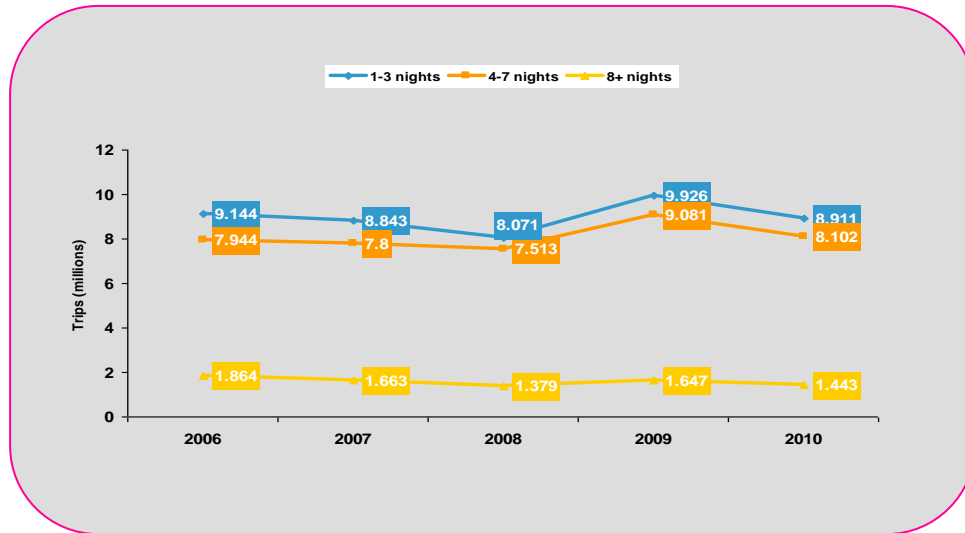
- Whereas longer holidays within England tend to be at seaside locations, in Scotland they are more likely to be taken within small towns (37%) and countryside/village locations (45%)
- Shorter 1-3 night holidays in Wales differ to those in England and Scotland in that they are less likely to be taken in cities and large towns and more likely to be taken at the seaside (42%)
- In Northern Ireland, 1-3 night and 4-7 night holidays are most likely to be taken at seaside locations (42% for both) whereas longer 8+ night holidays are more likely to be taken within large cities and towns (37%) and small towns (49%)

Table 6-1 - Types of location visited – (2006-2010 data %)

	Seaside & coast	Large city/town	Small town	Countryside/village
<b>UK</b>	<b>34%</b>	<b>26%</b>	<b>20%</b>	<b>23%</b>
1-3 nights	26%	33%	20%	22%
4-7 nights	46%	13%	19%	25%
8+ nights	47%	19%	26%	30%
<b>England</b>	<b>34%</b>	<b>27%</b>	<b>19%</b>	<b>23%</b>
1-3 nights	25%	35%	19%	21%
4-7 nights	49%	13%	17%	24%
8+ nights	49%	20%	25%	29%
<b>Scotland</b>	<b>18%</b>	<b>35%</b>	<b>27%</b>	<b>28%</b>
1-3 nights	15%	42%	23%	21%
4-7 nights	22%	24%	30%	35%
8+ nights	30%	29%	37%	45%
<b>Wales</b>	<b>48%</b>	<b>10%</b>	<b>20%</b>	<b>24%</b>
1-3 nights	42%	12%	21%	25%
4-7 nights	56%	5%	19%	23%
8+ nights	55%	11%	23%	27%
<b>Northern Ireland</b>	<b>41%</b>	<b>28%</b>	<b>19%</b>	<b>16%</b>
1-3 nights	42%	29%	16%	15%
4-7 nights	42%	22%	25%	17%
8+ nights	29%	37%	49%	21%

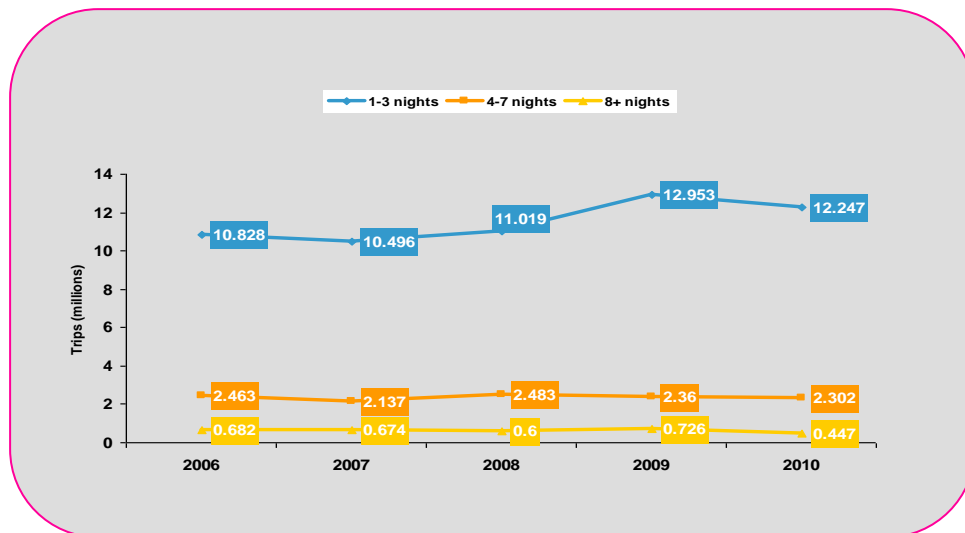
Charts 6-1 and 6-2 below illustrate the number of holiday trips for seaside/coastal locations and cities and large towns across the five years' period.

**Chart 6-1– Holiday Trips at seaside/coastal locations - by trip length (millions – 2006 to 2010)**



- These charts highlight the rise in popularity in holidays at seaside/coastal locations upto 2009
- The same pattern is true for 1-3 night holidays in cities and large towns, which recorded a sharp rise in holiday trips during 2009 before declining in 2010

**Chart 6-2 - Holiday trips in cities/large towns - by trip length (millions) – 2006 to 2010**



## 7. Types of Accommodation Used

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Section 7 examines the types of accommodation used on holiday trips. Table 7-1 overleaf presents key findings for the four key accommodation types:

- Serviced accommodation: hotels, guest houses and bed and breakfast establishments
- Self-catering (cottages, flats/apartments, houses)
- Camping and caravans (touring and static caravans and campsites)
- Homes of friends and relatives

In the UK, two in five holiday trips (43%) involve staying in serviced accommodation (a hotel, guest house or bed and breakfast). This type of accommodation is more prevalent on shorter 1-3 night trips (53%). The other types of accommodation: self-catering, camping and caravan, and staying with friends and relatives are more likely to be used on longer trips, particularly 8+ night holidays.

Notable variations at a country level are:

- Whereas holidays in England and Scotland mirror UK accommodation patterns, holidays in Wales are much more reliant on the camping and caravan sectors, with 56% of 8+ night holidays using this type of accommodation.
- In Northern Ireland, homes of friend and relatives are far more widely used, particularly for longer 4-7 (25%) and 8+ night holidays (32%).

Table 7-1 - Accommodation stayed in – (2006-2010 data %)

	Serviced (hotels & GHBB)	Self-catering	Camping & Caravans	Friends & relatives
<b>UK</b>	<b>43%</b>	<b>12%</b>	<b>27%</b>	<b>14%</b>
1-3 nights	53%	6%	23%	14%
4-7 nights	29%	21%	32%	12%
8+ nights	19%	23%	43%	23%
<b>England</b>	<b>44%</b>	<b>11%</b>	<b>26%</b>	<b>14%</b>
1-3 nights	55%	5%	21%	15%
4-7 nights	29%	20%	32%	11%
8+ nights	18%	23%	42%	23%
<b>Scotland</b>	<b>49%</b>	<b>15%</b>	<b>21%</b>	<b>14%</b>
1-3 nights	58%	8%	19%	12%
4-7 nights	38%	23%	23%	14%
8+ nights	30%	32%	27%	27%
<b>Wales</b>	<b>27%</b>	<b>15%</b>	<b>43%</b>	<b>11%</b>
1-3 nights	36%	8%	41%	11%
4-7 nights	19%	24%	42%	8%
8+ nights	11%	14%	56%	14%
<b>Northern Ireland</b>	<b>40%</b>	<b>9%</b>	<b>27%</b>	<b>18%</b>
1-3 nights	45%	6%	28%	15%
4-7 nights	20%	23%	24%	25%
8+ nights	30%	14%	26%	32%

## 8. Booking of Trip

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This section of the report looks at the booking channels used for UK holiday trips. This subject has witnessed some of the most significant changes in the tourism sector over the last few years, with the internet having a major impact on the way holidays are now booked. The majority of UK holiday trips are booked independently before the holiday. Although online booking increases in popularity year on year, overall, the majority of UK holidays are still booked offline.

Three in five holiday trips in the UK (62%) are booked pre-visit and almost one in three (31%) are booked online. A minority (7%) are package/inclusive holidays; this share rises to just over one in ten (12%) for 4-7 night holidays. 1-3 night holidays are more likely to be booked online (32%), with mid-length 4-7 night holidays more likely to be pre-booked before the trip (66%) and as part of a holiday package (12%).

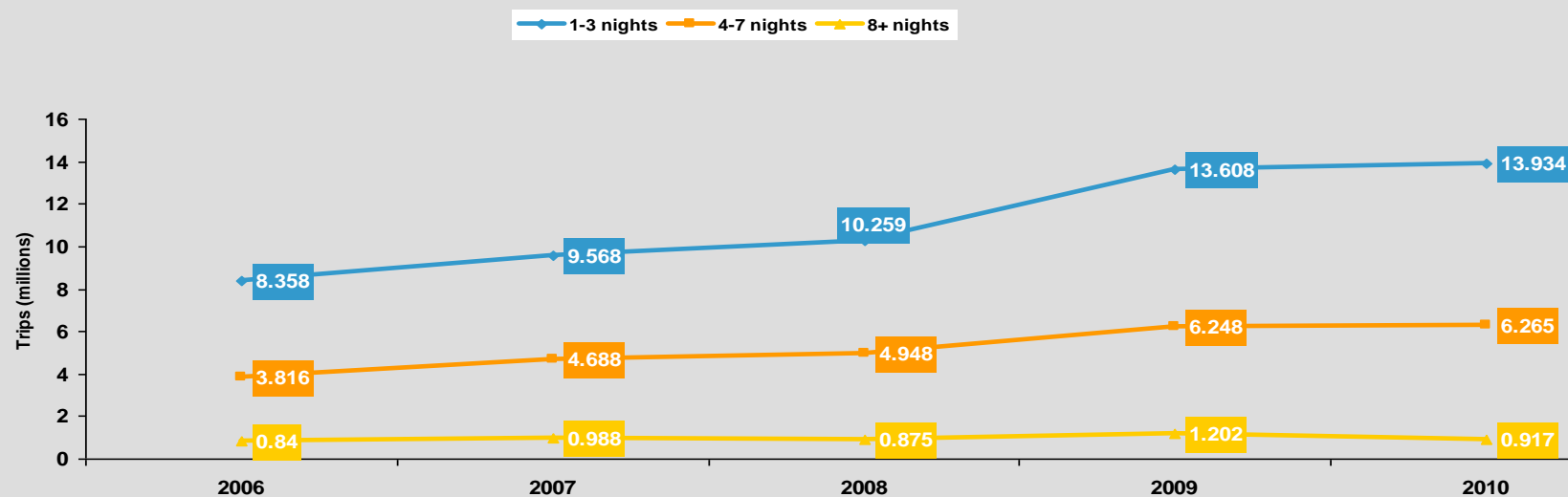
At a country level, notable variations are:

- In Scotland, 4-7 night holidays are more likely to be part of a package holiday (12%)
- In Wales, online booking is more prevalent among 4-7 night holidays (26%)
- In Northern Ireland, shorter 1-3 night holidays are more likely to be booked offline (75%) – this is likely to reflect that larger proportions of holidays in the Province are taken within the homes of friends and relatives. Longer 8+ night holidays are more likely to be booked pre-trip (70%) and online (39%) – this may be a reflection of the large number of visitors who book ferry/airline travel in advance before their trip.

Table 8-1 - Booking of trip – (2006-2010 data) %

	Pre-Booking vs. When there		Online or Offline		Organised vs. Independent	
	Pre-trip booking	During visit	Online	Offline	Package/inclusive	Not package
<b>UK</b>	<b>62%</b>	<b>38%</b>	<b>31%</b>	<b>69%</b>	<b>7%</b>	<b>93%</b>
1-3 nights	59%	41%	32%	68%	7%	93%
4-7 nights	66%	34%	30%	70%	12%	88%
8+ nights	60%	40%	29%	71%	8%	92%
<b>England</b>	<b>63%</b>	<b>37%</b>	<b>32%</b>	<b>68%</b>	<b>7%</b>	<b>93%</b>
1-3 nights	60%	40%	34%	66%	7%	93%
4-7 nights	68%	32%	30%	70%	12%	88%
8+ nights	63%	37%	29%	71%	9%	91%
<b>Scotland</b>	<b>62%</b>	<b>38%</b>	<b>33%</b>	<b>67%</b>	<b>7%</b>	<b>93%</b>
1-3 nights	61%	39%	34%	66%	7%	93%
4-7 nights	64%	36%	30%	70%	12%	88%
8+ nights	65%	35%	34%	66%	6%	94%
<b>Wales</b>	<b>53%</b>	<b>47%</b>	<b>24%</b>	<b>76%</b>	<b>6%</b>	<b>94%</b>
1-3 nights	49%	51%	23%	77%	6%	94%
4-7 nights	61%	39%	26%	74%	12%	88%
8+ nights	43%	57%	19%	81%	4%	96%
<b>Northern Ireland</b>	<b>60%</b>	<b>40%</b>	<b>27%</b>	<b>73%</b>	<b>2%</b>	<b>98%</b>
1-3 nights	58%	42%	25%	75%	2%	98%
4-7 nights	62%	38%	32%	68%	3%	97%
8+ nights	70%	30%	39%	61%	5%	95%

Chart 8-1- Booking of trip – online - UK – 2006 – 2010 data (millions)



- One of the fastest changing areas in the tourism industry is the dramatic increase in the number of holiday trips that are now booked online
- This is particularly so for shorter 1-3 night holidays which have increased from 8.4m in 2006 to 13.9m in 2009 – an increase of +65%
- The same is true for longer 4-7 night holidays within the UK which have also risen from 3.8m to 6.3m over the same time period – an increase of +66%
- The rate of increase has been slower for 8+ night holidays, but even so, online booking has risen by +50% from 0.8m in 2006 to 1.2m in 2009 before falling to 0.9m in 2010
- The rate of online booking has continued to increase for 1-3 night holidays (+2%) during 2010. It has remained consistent for 4-7 night holidays (+0.3%) but has fallen significantly for 8+ night holidays (-24%). This reflects that 8+ night holidays have decreased by -13% during 2010.



To illustrate the rapid growth in online trip booking, Table 8-2 below illustrates the percentage share between online and offline for 2010.

**Table 8-2 - Booking of trip – (2010 data) %**

	Online or Offline	
	Online	Offline
<b>UK</b>	<b>31%</b>	<b>69%</b>
1-3 nights	32%	68%
4-7 nights	30%	70%
8+ nights	29%	71%
<b>England</b>	<b>32%</b>	<b>68%</b>
1-3 nights	34%	66%
4-7 nights	30%	70%
8+ nights	29%	71%
<b>Scotland</b>	<b>33%</b>	<b>67%</b>
1-3 nights	34%	66%
4-7 nights	30%	70%
8+ nights	34%	66%
<b>Wales</b>	<b>24%</b>	<b>76%</b>
1-3 nights	23%	77%
4-7 nights	26%	74%
8+ nights	19%	81%
<b>Northern Ireland</b>	<b>27%</b>	<b>73%</b>
1-3 nights	25%	75%
4-7 nights	32%	68%
8+ nights	39%	61%

During 2010, around a third of trips in the UK were booked online (31%). This was more slightly more prevalent among trip booking for shorter 1-3 night holidays (32%).

## 9. Seasonal Variations

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This section presents the seasonal variations for holidays of different length. As the number of trips taken during March and April is influenced by when the Easter holiday period falls each year, rather than splitting the year into quarters, the year has been analysed on the basis of trips taken in:

- January to April
- May to June
- July to September
- October to December.

Table 9-1 presents the results based on these categories and then charts 9-1 – 9-5 illustrate the number of holidays taken on a monthly basis.

The holiday season in the UK is dominated by trips taken in the peak summer months of July – September (39%). This is particularly the case for longer 8+ night holidays (63%) and reflects the main school summer holiday period.

In the UK, around a 16% of all 1-3 night holiday trips are taken during the first four months of the year between January-April. Around one in five (21%) holidays of this length are also taken during the October-December period – this may well reflect the increase in holiday trips during the Christmas holiday season. 4-7 and 8+ night holidays dominate the July-September period when many people take their main holiday of the year. Close to half (47%) of 4-7 night holidays and over three in five (63%) of 8+ night holidays were taken during this period.

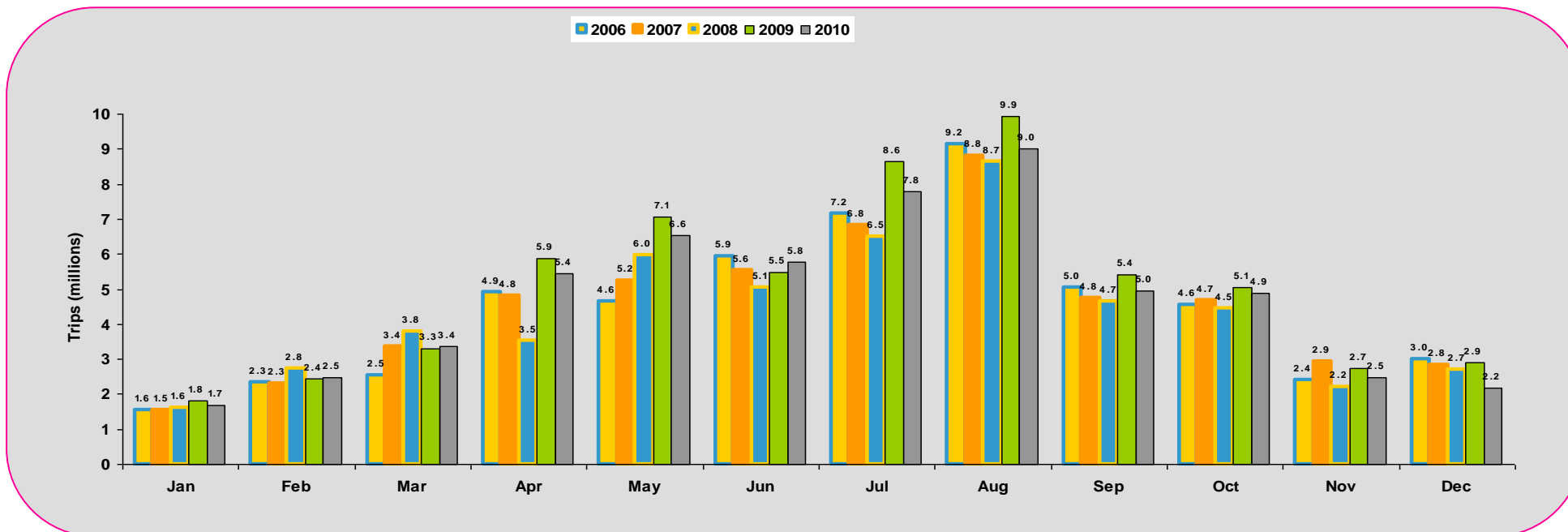
Notable variations at a country level are:

- In contrast to England, 8+ night holidays in Scotland account for a larger share of holidays during May-June (28%)
- Similarly, a larger proportion of holidays in Wales are taken during May-June in comparison to England. During these months, 1-3 night holidays were most prevalent (34%)

Table 9-1 - Seasonal variations – (2006-2010 data) %

	Jan-Apr	May-Jun	Jul-Sep	Oct-Dec
<b>UK</b>	<b>13%</b>	<b>30%</b>	<b>39%</b>	<b>18%</b>
1-3 nights	16%	30%	32%	21%
4-7 nights	9%	30%	47%	14%
8+ nights	5%	24%	63%	8%
<b>England</b>	<b>14%</b>	<b>29%</b>	<b>38%</b>	<b>19%</b>
1-3 nights	16%	30%	32%	22%
4-7 nights	9%	30%	47%	15%
8+ nights	6%	24%	63%	8%
<b>Scotland</b>	<b>15%</b>	<b>29%</b>	<b>38%</b>	<b>19%</b>
1-3 nights	19%	29%	32%	20%
4-7 nights	11%	28%	42%	19%
8+ nights	5%	28%	56%	11%
<b>Wales</b>	<b>9%</b>	<b>33%</b>	<b>44%</b>	<b>14%</b>
1-3 nights	13%	34%	35%	17%
4-7 nights	5%	33%	52%	10%
8+ nights	2%	24%	68%	6%
<b>Northern Ireland</b>	<b>14%</b>	<b>29%</b>	<b>41%</b>	<b>17%</b>
1-3 nights	15%	30%	36%	19%
4-7 nights	7%	27%	55%	11%
8+ nights	6%	21%	68%	6%

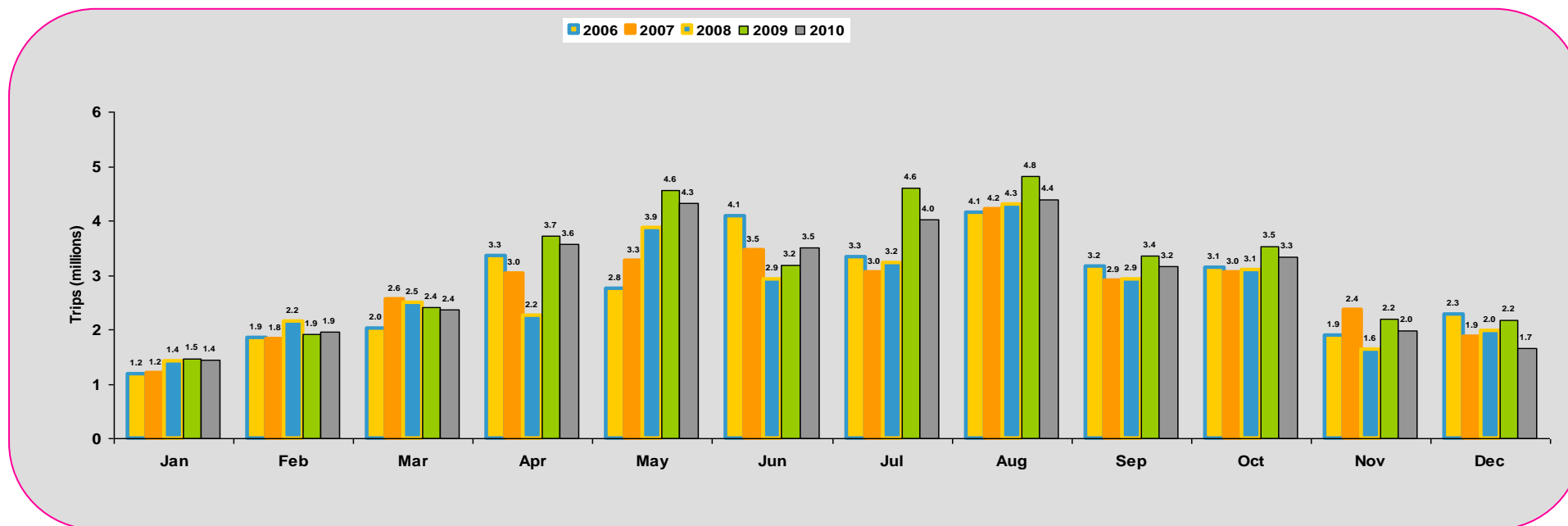
Chart 9-2 - Month-by-month – UK – 2006 to 2010 (millions)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>2006</b>	1.559	2.339	2.536	4.915	4.638	5.932	7.16	9.156	5.039	4.551	2.423	3.017
<b>2007</b>	1.535	2.325	3.372	4.833	5.24	5.552	6.837	8.81	4.762	4.696	2.935	2.824
<b>2008</b>	1.619	2.75	3.784	3.543	5.983	5.061	6.509	8.661	4.662	4.459	2.204	2.722
<b>2009</b>	1.814	2.44	3.301	5.879	7.077	5.472	8.631	9.92	5.412	5.062	2.741	2.909
<b>2010</b>	1.677	2.481	3.363	5.446	6.550	5.776	7.788	9.002	4.951	4.881	2.477	2.185

- 2009 recorded the largest number of holiday trips in the UK for 7 out of 12 months – Jan, Apr (Easter), May, Jul, Aug, Sep and Oct
- May continued to increase year on year from 2006 to 2009 – up from 4.6m in 2006 to 7.1m in 2009
- In contrast, 9 out of 12 months in 2010 decreased compared to 2009. The only months which reported an increase on 2009 were Feb, Mar and Jun.

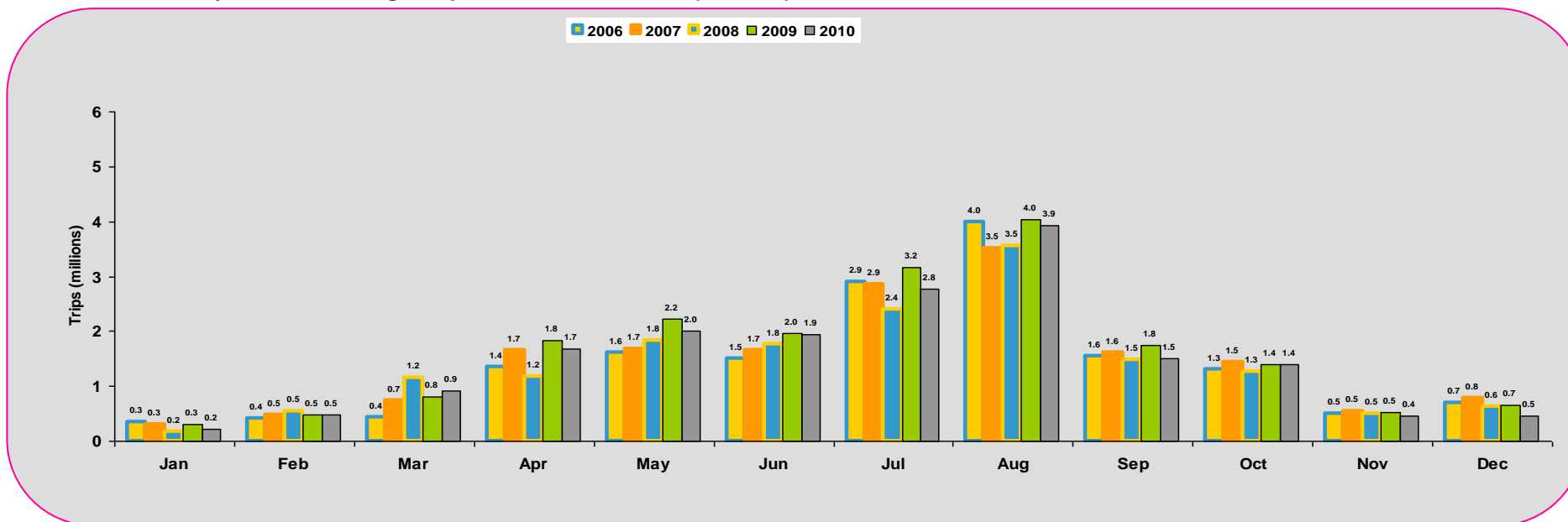
Chart 9-3 - Month-by-month – 1-3 night trips - UK – 2006 to 2010 (millions)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>2006</b>	1.183	1.855	2.03	3.345	2.76	4.077	3.342	4.145	3.166	3.133	1.898	2.27
<b>2007</b>	1.201	1.829	2.563	3.038	3.272	3.464	3.046	4.224	2.901	3.044	2.375	1.881
<b>2008</b>	1.422	2.156	2.484	2.249	3.865	2.935	3.219	4.295	2.934	3.096	1.644	1.989
<b>2009</b>	1.473	1.914	2.408	3.719	4.566	3.185	4.598	4.825	3.355	3.529	2.188	2.179
<b>2010</b>	1.441	1.949	2.375	3.563	4.333	3.512	4.028	4.378	3.17	3.333	1.981	1.657

- 1-3 night holidays vary considerably in March and April, depending on when the Easter holiday period falls. In 2009 and 2010, Easter fell in April resulting in a large increase in short holidays during this month. When Easter fell in March in 2008, there were fewer holidays taken in April (2.2m)
- Short holidays in June were at a peak in 2006, declining in 2007 and 2008, but increasing during 2009 and 2010
- During 2010, after a successful June, July – December recorded month on month decreases relative to 2009

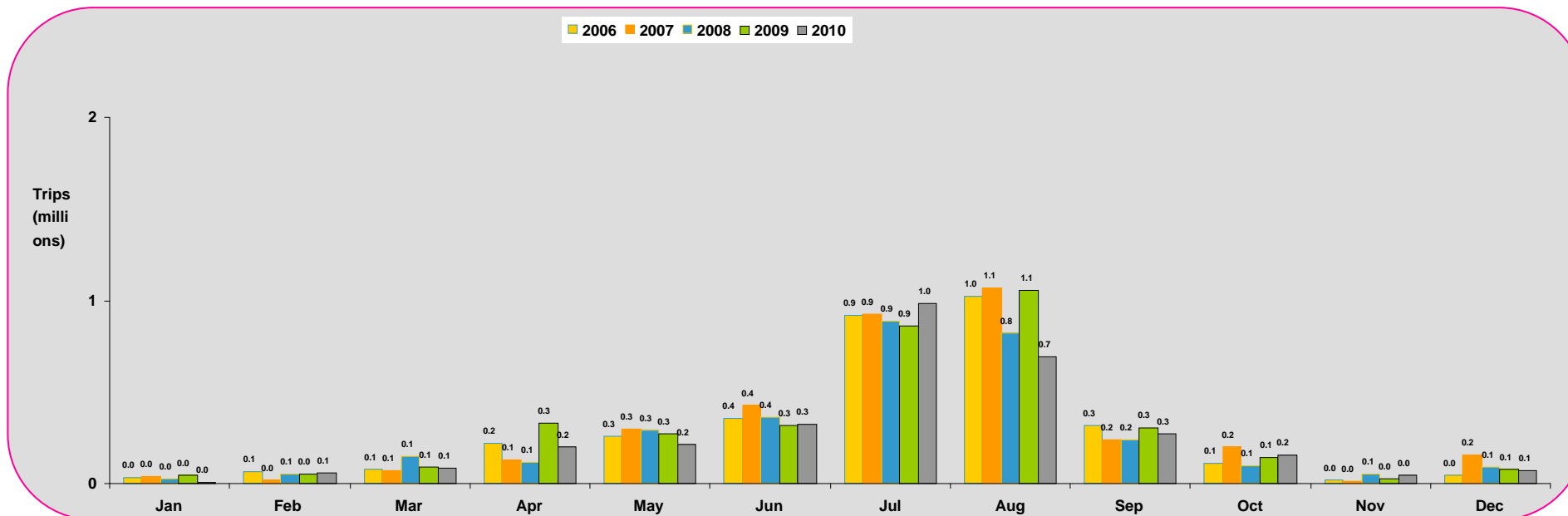
Chart 9-4 - Month-by-month – 4-7 night trips - UK – 2006 to 2010 (millions)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>2006</b>	0.344	0.421	0.429	1.352	1.618	1.497	2.9	3.99	1.558	1.308	0.504	0.701
<b>2007</b>	0.295	0.475	0.741	1.668	1.67	1.664	2.864	3.515	1.622	1.45	0.544	0.787
<b>2008</b>	0.169	0.541	1.151	1.18	1.826	1.765	2.406	3.547	1.487	1.269	0.507	0.642
<b>2009</b>	0.297	0.476	0.802	1.833	2.236	1.972	3.171	4.038	1.754	1.394	0.524	0.655
<b>2010</b>	0.228	0.474	0.906	1.683	2.006	1.940	2.779	3.932	1.509	1.395	0.449	0.457

- A similar pattern to 1-3 night holidays is evident for longer 4-7 night holidays, with the Easter holiday period impacting on March and April (depending when it falls)
- Easter fell in April in 2009 resulting in a large increase in the number of 4-7 night holidays (up to 1.8m)
- 4-7 night holidays are most popular during July and August
- May has been the third most popular month for holidays of this length, varying between 1.6m in 2006 and 2.2m trips in 2009
- During 2010, March and October were the only months that recorded an increase on 2009.

Chart 9-5 - Month-by-month – 8+ night trips - UK – 2006 to 2010 (millions)

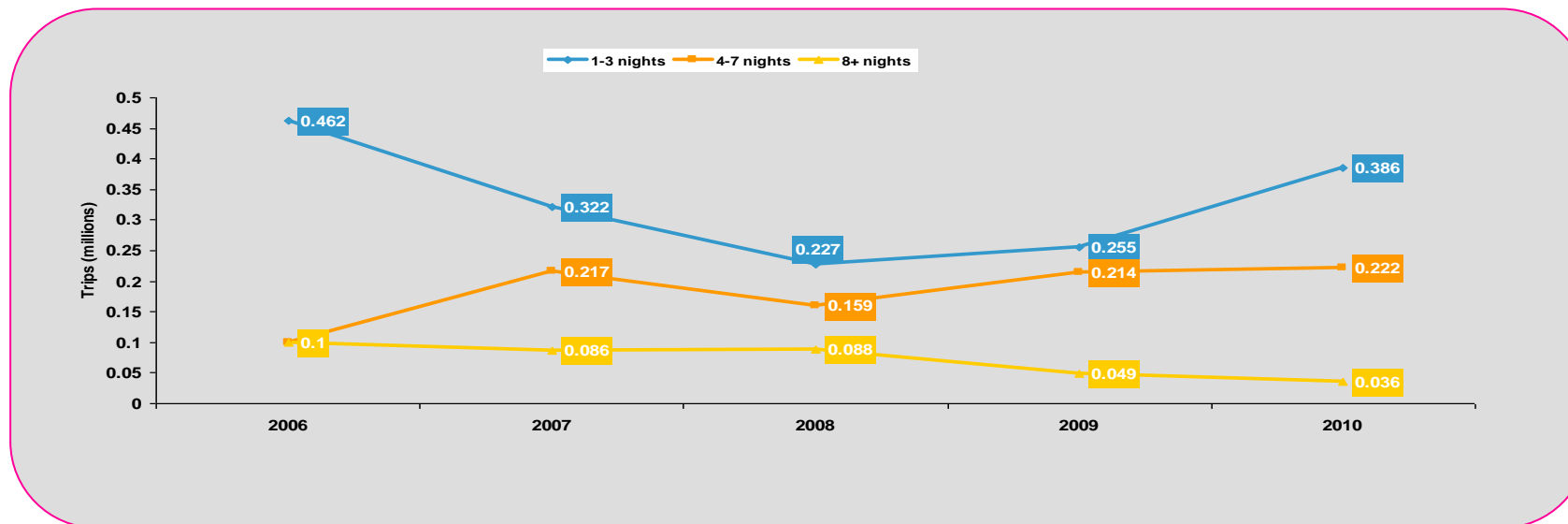


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>2006</b>	0.032	0.063	0.078	0.219	0.261	0.358	0.918	1.021	0.315	0.11	0.021	0.047
<b>2007</b>	0.038	0.021	0.068	0.127	0.298	0.424	0.927	1.071	0.239	0.202	0.016	0.156
<b>2008</b>	0.028	0.052	0.148	0.114	0.293	0.361	0.884	0.819	0.241	0.095	0.053	0.091
<b>2009</b>	0.043	0.049	0.091	0.327	0.275	0.315	0.862	1.057	0.302	0.14	0.028	0.075
<b>2010</b>	0.008	0.057	0.082	0.200	0.212	0.324	0.981	0.692	0.272	0.153	0.047	0.071

- 8+ night holidays within the UK have remained at a consistent level during the last five years
- July and August account for the largest share of holidays of this length, reflecting that for many, main summer holiday of the year will be taken in these months
- The number of trips recorded in July during 2010 was the highest in the last five years. In contrast, August recorded the lowest number of trips during this period

One of the more interesting monthly variations across the five years' time period has been Scottish holiday trips during the month of June.

**Chart 9-1 - Seasonal variations – June - Scotland – 2006 to 2010 (millions)**



- Although 4-7 night holidays have increased in popularity between 2006 and 2010 for the month of June, rising from 0.10m to 0.22m (an increase of +120%), 1-3 and 8+ night holidays have decreased over this time period by -16% and -64% respectively
- As 1-3 night holidays account for a majority share of the holiday market in June (56% of all trips), the decline in these shorter trips has had a significant impact on the overall number of holiday trips in the month during 2007 to 2009.



## 10. Transport Used

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This final section presents the key findings for the main modes of transport used for the longest part of the holiday journey. Table 10-1 overleaf illustrates the main types of transport used based on a five years' average between 2006 and 2010.

In the UK, the car is the dominant form of transport for holiday trips in the UK with around eight out of ten (79%) of trips involving a private/hired car for the longest part of the journey from home to the holiday destination. Trains are used on a larger proportion of 1-3 night trips (9%), reflecting the bias towards city destinations. Organised coach tours are more likely to be used on 4-7 night trips (7%). More than eight out of ten (83%) 8+ night holidays rely on a car as the main form of transport. This reflects the suitability of the car on trips of this length which normally involve more luggage compared to a shorter holiday trip.

Notable variations at a country level are:

- In Scotland, 7% 1-3 night trips involved travel by plane – a reflection of the large number of short city breaks in cities such as Edinburgh and Glasgow from visitors from other parts of the UK
- Holidays of all lengths in Wales were less reliant on public transport (10%) and more reliant on cars (86%). This reflects that a large proportion of holidays in Wales are longer, seaside family holidays
- Reflecting its location, holidays in Northern Ireland were more reliant on public transport, with three in ten (29%) 4-7 night trips made by plane. In total, 20% of trips of this length involved public transport

Table 10-1 – Transport used – (2006-2010 data) %

	Train	Regular bus/coach	Organised coach tour	Plane	Total public transport	Car (own/hired)	Other
<b>UK</b>	<b>9%</b>	<b>3%</b>	<b>4%</b>	<b>2%</b>	<b>17%</b>	<b>79%</b>	<b>4%</b>
1-3 nights	10%	2%	2%	3%	18%	78%	4%
4-7 nights	6%	3%	7%	2%	18%	79%	3%
8+ nights	6%	2%	2%	3%	12%	83%	5%
<b>England</b>	<b>9%</b>	<b>3%</b>	<b>4%</b>	<b>2%</b>	<b>17%</b>	<b>79%</b>	<b>4%</b>
1-3 nights	11%	2%	2%	2%	18%	78%	4%
4-7 nights	6%	3%	6%	1%	17%	80%	3%
8+ nights	6%	2%	1%	3%	11%	84%	5%
<b>Scotland</b>	<b>10%</b>	<b>4%</b>	<b>5%</b>	<b>7%</b>	<b>26%</b>	<b>69%</b>	<b>5%</b>
1-3 nights	12%	4%	2%	7%	25%	70%	5%
4-7 nights	7%	4%	11%	6%	28%	67%	5%
8+ nights	9%	2%	4%	5%	21%	76%	5%
<b>Wales</b>	<b>4%</b>	<b>1%</b>	<b>3%</b>	<b>1%</b>	<b>10%</b>	<b>86%</b>	<b>4%</b>
1-3 nights	4%	1%	2%	1%	8%	87%	5%
4-7 nights	4%	2%	5%	*	12%	85%	3%
8+ nights	4%	1%	1%	2%	7%	88%	5%
<b>Northern Ireland</b>	<b>3%</b>	<b>3%</b>	<b>1%</b>	<b>14%</b>	<b>20%</b>	<b>73%</b>	<b>7%</b>
1-3 nights	3%	3%	1%	11%	18%	77%	5%
4-7 nights	*	2%	1%	25%	29%	63%	8%
8+ nights	3%	4%	2%	15%	25%	46%	29%

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