

GB Domestic Tourism: Monthly Volume & Value 2011

ALL TOURISM

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Mar		
TRIPS (millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	5.417	6.024	11.2%	6.949	8.011	15.3%	8.744	8.029	-8.2%																										21.110	22.064	4.5%		
England	4.534	5.139	13.3%	5.853	6.690	14.3%	7.331	6.624	-9.6%																										17.719	18.453	4.1%		
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Mar		
BEDNIGHTS (millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	11.819	14.822	25.4%	18.230	20.051	10.0%	23.899	20.677	-13.5%																											53.948	55.550	3.0%	
England	9.512	12.615	32.6%	14.132	16.411	16.1%	19.453	16.923	-13.0%																											43.097	45.948	6.6%	
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Mar		
EXPENDITURE (£ millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	£726	£923	27.1%	£1,067	£1,215	13.9%	£1,460	£1,289	-11.7%																											£3,253	£3,426	5.3%	
England	£596	£755	26.7%	£835	£981	17.5%	£1,185	£1,066	-10.0%																											£2,617	£2,802	7.1%	

HEADLINE ANALYSIS:

- March 2011 was a weaker month for GB tourism with trips decreasing by -8% compared to March 2010. Nights and spend also decreased by -14% and -12% respectively.
- YTD – due to a positive Jan/Feb period, GB trips are still ahead of 2010 with an increase of +5% between Jan-Mar, with nights and spend also increasing by +3% and +5% respectively.
- In 2011, GB trips during Jan-Mar (22.1m) were higher than in 2010 (21.1m) and 2009 (20.5m). Jan-Mar during 2008 was boosted by Easter falling in March resulting in 23.6m trips – the highest figure in the last six years (2007 recorded 22.3m and 2006 21.1m).

Please note relatively low volumes of trips taken during January/February compared to the rest of the year. Caution should be applied when interpreting results.

All expenditure figures are in
HISTORIC PRICES

Undertaken by TNS-RI Travel & Tourism
Fieldwork: 9th Mar – 1st May 2011
TNS-RI Face-to-Face Omnibus Survey

GB Domestic Tourism: Monthly Volume & Value 2011 HOLIDAYS

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Mar		
TRIPS (millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	1.632	1.681	3.0%	2.380	2.729	14.7%	3.289	3.334	1.3%	11.338																									7.301	7.745	6.1%		
England	1.273	1.395	9.6%	1.824	2.207	21.0%	2.694	2.601	-3.4%	9.193																									5.792	6.203	7.1%		
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Mar		
BEDNIGHTS (millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	3.480	3.945	13.4%	6.633	7.274	9.7%	9.754	9.093	-6.7%	33.003																									19.867	20.312	2.2%		
England	2.601	3.130	20.3%	5.057	5.609	10.9%	8.049	6.906	-14.2%	25.667																									15.707	15.645	-0.4%		
	January			February			March			April			May			June			July			August			September			October			November			December			YTD Jan-Mar		
EXPENDITURE (£ millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	£304	326	7.2%	£460	£552	20.0%	£618	£636	2.9%																										£1,383	£1,514	9.5%		
England	£241	265	10.0%	£344	£416	20.9%	£497	£495	-0.4%																										£1,083	£1,176	8.6%		

HEADLINE ANALYSIS:

- GB holiday trips during March reported a small increase of +1%. Nights however fell by -7% whilst spend increased by +3%.
- YTD – GB holiday trips recorded an increase of +6% on 2010 (helped by a solid Jan-Feb period), with nights and spend also increasing by +2% and +10% respectively.
- GB holiday trips during Jan-Mar 2011 (7.7m) outperformed the previous six years (with the exception of 2008 (7.9m) when Easter fell in March). 2006, 07, 09 & 10 (which like 2011, saw Easter fall in April) varied between 6.2m (06) and 7.3m (09/10).

All expenditure figures are in
HISTORIC PRICES

Undertaken by TNS-RI Travel & Tourism
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GB Domestic Tourism: Monthly Volume & Value 2011

VISITING FRIENDS & RELATIVES

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Mar		
TRIPS (millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	2.516	2.854	13.4%	3.108	3.552	14.3%	3.205	2.887	-9.9%																									8.829	9.293	5.3%			
England	2.202	2.489	13.0%	2.762	3.139	13.6%	2.822	2.477	-12.2%																									7.786	8.105	4.1%			
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Mar		
BEDNIGHTS (millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	5.893	6.210	5.4%	7.977	8.666	8.6%	8.732	7.761	-11.1%																										22.602	22.638	0.2%		
England	4.891	5.368	9.8%	6.503	7.441	14.4%	7.496	6.773	-9.6%																										18.890	19.581	3.7%		
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Mar		
EXPENDITURE (£ millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	£186	£254	36.6%	£297	£316	6.4%	£304	£299	-1.6%																										£788	£869	10.3%		
England	£154	£213	38.3%	£246	£279	13.4%	£257	£252	-1.9%																										£657	£744	13.2%		

HEADLINE ANALYSIS:

- March 2011 was a challenging month for VFR tourism with trips falling by -10% compared to 2010 at a GB level. Nights reported a similar decrease of -11% whilst spend decreased by -2%.
- YTD – GB VFR tourism has increased by +5% over 2010. Nights however reported no change (0%) whilst spend has increased by +10%.
- VFR trips in GB during Jan-Mar 2011 (9.3m) were higher than 2010 (8.8m) and 2009 (8.5m) but lower than 2008 (when Easter fell in Mar – 10.1m), 2007 (9.7m) and 2006 (9.5m).

All expenditure figures are in
HISTORIC PRICES

Undertaken by TNS-RI Travel & Tourism
Fieldwork: 9th Mar – 1st May 2011
TNS-RI Face-to-Face Omnibus Survey

GB Domestic Tourism: Monthly Volume & Value 2011

BUSINESS TOURISM

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Mar		
TRIPS (millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	1.088	1.259	15.7%	1.188	1.418	19.4%	1.957	1.525	-22.1%																									4.233	4.201	-0.8%			
England	0.893	1.065	19.3%	1.022	1.186	16.0%	1.583	1.319	-16.7%																									3.498	3.570	2.1%			
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Mar		
BEDNIGHTS (millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	2.117	2.765	30.6%	2.513	2.721	8.3%	4.386	3.315	-24.4%																										9.017	8.801	-2.4%		
England	1.720	2.326	35.2%	2.198	2.233	1.6%	3.249	2.853	-12.2%																										7.167	7.412	3.4%		
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Mar		
EXPENDITURE (£ millions)	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch	2010	2011	%ch			
GB	£207	£296	43.0%	£244	£310	27.0%	£494	£319	-35.4%																										£945	£925	-2.1%		
England	£174	£233	33.9%	£209	£260	24.4%	£393	£291	-26.0%																										£776	£784	1.0%		

HEADLINE ANALYSIS:

- Consistent with the other trip purposes, GB business trips also reported a weaker performance in March with trips, nights and spend all decreasing by -22%, -24% and -35% respectively.
- YTD – GB business trips have decreased slightly by -1% (helped by a good Jan-Feb) for trips compared to 2010. Nights and spend also decreased by -2% each.
- Business trips during Jan-Mar 2011 (4.2m) are at the same level as 2010 (4.2m). The 2006-09 period varied between 4.8m (07) to 4.0m (09).

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Fieldwork: 9th Mar – 1st May 2011
TNS-RI Face-to-Face Omnibus Survey

Great Britain Tourism Survey

GB Domestic Tourism: Year to Date – 2006-2011

Trips, Bednights & Expenditure, Jan-Mar period

	ALL TOURISM, Jan – Mar period						HOLIDAYS – Jan – Mar period						VFR – Jan – Mar period						Business – Jan - Mar period					
TRIPS (millions)	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011
GB	21.064	22.257	23.585	20.454	21.110	22.064	6.218	6.957	7.935	7.323	7.301	7.745	9.547	9.742	10.104	8.527	8.829	9.293	4.515	4.834	4.466	3.971	4.233	4.201
England	17.673	18.725	19.748	17.47	17.719	18.453	4.975	5.586	6.408	5.946	5.792	6.203	8.217	8.475	8.644	7.612	7.786	8.105	3.842	4.086	3.82	3.368	3.498	3.570
	ALL TOURISM, Jan - Mar period						HOLIDAYS – Jan - Mar period						VFR – Jan - Mar period						Business – Jan - Mar period					
BEDNIGHTS (millions)	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011
GB	56.100	56.856	64.957	53.588	53.948	55.550	16.972	20.084	23.051	21.301	19.867	20.312	24.765	24.323	27.810	21.333	22.602	22.638	11.349	9.954	9.719	9.229	9.017	8.801
England	45.678	46.017	53.774	44.796	43.097	45.948	13.708	15.004	18.376	16.999	15.707	15.645	20.832	21.134	23.849	18.829	18.890	19.581	8.829	8.239	8.206	7.619	7.167	7.412
	ALL TOURISM, Jan - Mar period						HOLIDAYS – Jan - Mar period						VFR – Jan - Mar period						Business – Jan - Mar period					
EXPENDITURE (£ millions)	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011
GB	£3,135	£3,557	£3,756	£3,239	£3,253	£3,426	£1,115	£1,322	£1,607	£1,373	£1,383	£1,514	£846	£867	£963	£800	£788	£869	£1,049	£1,240	£1,060	£973	£945	£925
England	£2,473	£2,855	£3,063	£2,653	£2,617	£2,802	£885	£999	£1,289	£1,108	£1,083	£1,176	£716	£745	£775	£703	£657	£744	£788	£1,025	£897	£771	£776	£784

GB Domestic Tourism: Year to Date – 2006-2011

Trip Characteristics, Jan-Mar period

	ALL TOURISM, Jan - Mar period						HOLIDAYS – Jan - Mar period						VFR – Jan - Mar period						Business – Jan - Mar period					
Av. Trip Length	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011
GB	2.66	2.55	2.75	2.62	2.56	2.52	2.73	2.89	2.90	2.91	2.72	2.62	2.59	2.50	2.75	2.50	2.56	2.44	2.51	2.06	2.18	2.32	2.13	2.09
England	2.58	2.46	2.72	2.56	2.43	2.49	2.76	2.69	2.87	2.86	2.71	2.52	2.54	2.49	2.76	2.47	2.43	2.42	2.30	2.02	2.15	2.26	2.05	2.08
	ALL TOURISM, Jan - Mar period						HOLIDAYS – Jan - Mar period						VFR – Jan - Mar period						Business – Jan - Mar period					
Av. £ / Night	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011
GB	£56	£63	£58	£60	£60	£62	£66	£66	£70	£64	£70	£75	£34	£36	£35	£38	£35	£38	£92	£125	£109	£105	£105	£105
England	£54	£62	£57	£59	£61	£61	£65	£67	£70	£65	£69	£75	£34	£35	£32	£37	£35	£38	£89	£124	£109	£101	£108	£106
	ALL TOURISM, Jan - Mar period						HOLIDAYS – Jan - Mar period						VFR – Jan - Mar period						Business – Jan - Mar period					
Av. £ / Trip	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011
GB	£149	£160	£159	£158	£154	£155	£179	£190	£203	£187	£189	£195	£89	£89	£95	£94	£89	£94	£232	£257	£237	£245	£223	£220
England	£140	£152	£155	£152	£148	£152	£178	£179	£201	£186	£187	£190	£87	£88	£90	£92	£84	£92	£205	£251	£235	£229	£222	£220