

## GB Domestic Tourism: Monthly Volume &amp; Value 2011

## ALL TOURISM

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-May		
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%	11.338	11.957	+5.5%	11.796	10.821	-8.3%																			44.244	44.842	+1.4%			
England	4.534	5.139	+13.3%	5.853	6.690	+14.3%	7.331	6.624	-9.6%	9.193	9.910	+7.8%	9.757	8.818	-9.6%																			36.669	37.181	+1.4%			
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-May		
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%	33.003	36.930	+11.9%	34.739	32.983	-5.1%																			121.690	125.463	+3.1%			
England	9.512	12.615	+32.6%	14.132	16.411	+16.1%	19.453	16.923	-13.0%	25.667	29.557	+15.2%	27.563	25.963	-5.8%																			96.326	101.469	+5.3%			
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-May		
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%	£1,767	£2,040	+15.4%	£1,979	£1,983	+0.2%																			£6,999	£7,449	+6.4%			
England	£596	£755	+26.7%	£835	£981	+17.5%	£1,185	£1,066	-10.0%	£1,435	£1,643	+14.5%	£1,595	£1,578	-1.1%																			£5,647	£6,023	+6.7%			

**HEADLINE ANALYSIS:**

After a successful April, when tourism was boosted by several public holidays, GB tourism in May fell by -8%. Bednights also fell by -5% whilst expenditure was at a standstill (0%). As illustrated on the following slide, holiday tourism during the month was notably down on May 2010. This was possibly a result of fewer holiday trips being taken during May as many will have holidayed in April instead. The weather in May was also poor, especially when compared to April when many parts of GB experienced hot and sunny weather.

YTD – helped by a positive Jan, Feb and Apr period, GB trips are still ahead of 2010 with an increase of +1% between Jan-May, with nights and spend also increasing by +3% and +6% respectively.

Encouragingly, in 2011, GB trips during Jan-May increased to 44.8m – the highest level in the last six years. 2010 recorded 44.2m, similar to that recorded during 2009 (44.1m). Since 2006, there has been an increase in GB tourism year-on-year. 2006 recorded 41.9m trips, 2007 – 43.3m and 2008 43.6m.

Please note that the latest 2011 results are provisional and subject to minor changes in subsequent months due to the inclusion of trip-takers returning from late trips. Pre-2011 results are based on full-year data so will not change.

All expenditure figures are in  
HISTORIC PRICES

Undertaken by TNS-RI Travel & Tourism  
Fieldwork: 11th May – 26th June 2011  
TNS-RI Face-to-Face Omnibus Survey

# Great Britain Tourism Survey

## GB Domestic Tourism: Monthly Volume & Value 2011 HOLIDAYS

TRIPS (millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-May		
	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	+1.4%	5.256	6.199	+17.9%	6.443	5.705	-11.5%																			19.000	19.648	+3.4%			
England	1.273	1.395	+9.6%	1.824	2.207	+21.0%	2.694	2.601	-3.5%	4.086	4.903	+20.0%	5.134	4.378	-14.7%																			15.012	15.483	+3.1%			
BEDNIGHTS (millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-May		
	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	-6.8%	18.051	21.234	+17.6%	21.109	20.395	-3.4%																				59.026	61.940	+4.9%		
England	2.601	3.130	+20.3%	5.057	5.609	+10.9%	8.049	6.906	-14.2%	13.688	16.463	+20.3%	16.110	15.467	-4.0%																			45.505	47.575	+4.5%			
EXPENDITURE (£ millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD Jan-May		
	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%	£1,011	£1,308	+29.4%	£1,241	£1,220	-1.7%																				£3,635	£4,042	+11.2%		
England	£241	£265	+10.0%	£344	£416	+20.9%	£497	£495	-0.4%	£828	£1,018	+22.9%	£951	£936	-1.6%																				£2,862	£3,129	+9.3%		

### HEADLINE ANALYSIS:

- Following an +18% increase for GB holiday trips during April, May was less positive with a -12% decrease. Nights also decreased by -3% as did spend which fell by -2%. It is likely that May was affected by the success of April, when a combination of several public holidays and good weather contributed to increased tourism, resulting in many taking trips which took place or started in April rather than in May.
- Even though May was down on 2010, YTD – GB holiday trips still recorded an increase of +3% on 2010 (helped by a solid Jan-Feb and Apr period), with nights and spend also increasing by +5% and +11% respectively.
- GB holiday trips during Jan-May 2011 (19.7m) outperformed the previous six years with the exception of 2009 when 20.0m trips were taken. 2010 reported 19.0m holiday trips. The last three years have all performed far better than 2006 (15.5m), 2007 (16.7m) and 2008 (17.2m).

Please note that the latest 2011 results are provisional and subject to minor changes in subsequent months due to the inclusion of trip-takers returning from late trips. Pre-2011 results are based on full-year data so will not change.

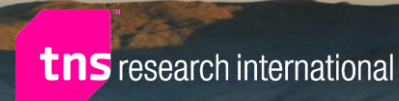
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# Great Britain Tourism Survey

## GB Domestic Tourism: Monthly Volume & Value 2011

### VISITING FRIENDS & RELATIVES



	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-May		
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%	4.445	3.932	-11.5%	3.491	3.369	-3.5%																								
England	2.202	2.489	+13.0%	2.762	3.139	+13.6%	2.822	2.477	-12.2%	3.744	3.381	-9.7%	3.021	2.937	-2.8%																								

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-May		
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%	11.519	11.310	-1.8%	9.345	8.847	-5.3%																								
England	4.891	5.368	+9.8%	6.503	7.441	+14.4%	7.496	6.773	-9.6%	9.254	9.276	+0.2%	7.803	7.414	-5.0%																								

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-May		
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%	£408	£374	-8.3%	£339	£354	+4.4%																								
England	£154	£213	+38.3%	£246	£279	+13.4%	£257	£252	-1.9%	£333	£313	-6.0%	£295	£297	+0.7%																								

#### HEADLINE ANALYSIS:

- VFR tourism decreased for the third month in a row, with trips falling by -4%. Nights also fell by -5% although spend increased by +4%.
- Consequently, the poor last three months have resulted in YTD trips for 2011 decreasing by -1% on 2010. Nights also fell by -2% although spend continued to remain ahead of 2010 by +4%, indicating a trend towards shorter but higher spending trips.
- In contrast to holiday tourism, VFR tourism during 2011 (16.6m) recorded the second lowest in the last six years. Only 2009 recorded lower numbers (16.1m). 2006, 2007, 2008 & 2010 all varied between 16.8m – 17.1m.

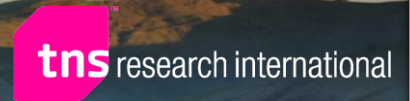
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# GB Domestic Tourism: Monthly Volume & Value 2011

## BUSINESS TOURISM



	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-May		
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%	1.413	1.416	+0.2%	1.529	1.400	-8.4%																								
England	0.893	1.065	+19.3%	1.022	1.186	+16.0%	1.583	1.319	-16.7%	1.187	1.258	+6.0%	1.298	1.202	-7.4%																								
BEDNIGHTS (millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-May		
GB	2.117	2.765	+30.6%	2.513	2.721	+8.3%	4.386	3.315	-24.4%	2.844	3.593	+26.3%	3.371	2.847	-15.5%																								
England	1.720	2.326	+35.2%	2.198	2.233	+1.6%	3.249	2.853	-12.2%	2.220	3.138	+41.4%	2.887	2.271	-21.3%																								
EXPENDITURE (£ millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-May		
GB	£207	£296	+43.0%	£244	£310	+27.0%	£494	£319	-35.4%	£316	£303	-4.1%	£356	£380	+6.7%																								
England	£174	£233	+33.9%	£209	£260	+24.4%	£393	£291	-26.0%	£247	£266	+7.7%	£309	£323	+4.5%																								

### HEADLINE ANALYSIS:

- GB business trips declined by -8% during May. Nights decreased even more, falling by -16%. In contrast, spend increased by +7% indicating shorter, but higher spending trips.
- YTD, following a weak Mar-May period, GB business trips have decreased by -2% compared to 2010. Nights are at a standstill (0%) whilst spend decreased slightly by -1%.
- Business trips during Jan-May 2011 (7.0m) are at similar levels to 2010 (7.2m). – both are lower than the 7.7m recorded in 2006 and 8.1m during 2007, but an improvement on 2009 when they fell to 6.9m.

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# Great Britain Tourism Survey

## GB Domestic Tourism: Year to Date – 2006-2011

### Trips, Bednights & Expenditure, Jan-May period

	ALL TOURISM, Jan – May period						HOLIDAYS – Jan – May period						VFR – Jan – May period						Business – Jan – May period					
<b>TRIPS (millions)</b>	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	41.891	43.248	43.592	44.117	44.244	44.842	15.494	16.719	17.158	19.966	19.000	19.648	17.075	17.221	17.147	16.095	16.765	16.594	7.727	8.08	7.626	6.938	7.175	7.017
England	34.582	35.869	36.425	37.002	36.669	37.181	12.055	13.149	13.814	15.929	15.012	15.483	14.646	14.968	14.755	14.184	14.551	14.422	6.578	6.800	6.502	5.911	5.983	6.030
	ALL TOURISM, Jan – May period						HOLIDAYS – Jan – May period						VFR – Jan – May period						Business – Jan – May period					
<b>BEDNIGHTS (millions)</b>	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	119.958	122.791	130.713	128.882	121.69	125.463	49.346	54.925	56.613	65.990	59.026	61.940	46.644	46.143	49.487	43.127	43.466	42.795	18.439	17.726	17.989	16.812	15.232	15.241
England	95.893	97.193	106.860	105.369	96.326	101.469	37.662	40.325	43.727	51.958	45.505	47.575	39.037	39.743	42.583	37.113	35.947	36.272	14.815	14.470	15.231	13.825	12.274	12.821
	ALL TOURISM, Jan – May period						HOLIDAYS – Jan – May period						VFR – Jan – May period						Business – Jan – May period					
<b>EXPENDITURE (£ millions)</b>	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	£6,496	£6,841	£7,404	£7,214	£6,999	£7,449	£2,868	£3,118	£3,538	£3,743	£3,635	£4,042	£1,601	£1,551	£1,761	£1,617	£1,536	£1,598	£1,785	£1,968	£1,878	£1,707	£1,617	£1,608
England	£5,110	£5,457	£6,003	£5,890	£5,647	£6,023	£2,206	£2,386	£2,815	£3,003	£2,862	£3,129	£1,351	£1,329	£1,436	£1,395	£1,286	£1,354	£1,368	£1,600	£1,565	£1,372	£1,332	£1,373

# Great Britain Tourism Survey

## GB Domestic Tourism: Year to Date – 2006-2011

### Trip Characteristics, Jan-May period

	ALL TOURISM, Jan – May period						HOLIDAYS – Jan – May period						VFR – Jan – May period						Business – Jan – May period					
<b>Av. Trip Length</b>	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	2.86	2.84	3.00	2.92	2.75	2.80	3.18	3.29	3.30	3.31	3.11	3.15	2.73	2.68	2.89	2.68	2.59	2.58	2.39	2.19	2.36	2.42	2.12	2.17
England	2.77	2.71	2.93	2.85	2.63	2.73	3.12	3.07	3.17	3.26	3.03	3.07	2.67	2.66	2.89	2.62	2.47	2.52	2.25	2.13	2.34	2.34	2.05	2.13
	ALL TOURISM, Jan – May period						HOLIDAYS – Jan – May period						VFR – Jan – May period						Business – Jan – May period					
<b>Av. £ / Night</b>	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	£54	£56	£57	£56	£58	£59	£58	£57	£62	£57	£62	£65	£34	£34	£36	£37	£35	£37	£97	£111	£104	£102	£106	£106
England	£53	£56	£56	£56	£59	£59	£59	£59	£64	£58	£63	£66	£35	£33	£34	£38	£36	£37	£92	£111	£103	£99	£109	£107
	ALL TOURISM, Jan – May period						HOLIDAYS – Jan – May period						VFR – Jan – May period						Business – Jan – May period					
<b>Av. £ / Trip</b>	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	£155	£158	£170	£164	£158	£166	£185	£186	£206	£187	£191	£206	£94	£90	£103	£100	£92	£96	£231	£244	£246	£246	£225	£229
England	£148	£152	£165	£159	£154	£162	£183	£181	£204	£189	£191	£202	£92	£89	£97	£98	£88	£94	£208	£235	£241	£232	£223	£228