

GB Domestic Tourism: Monthly Volume & Value 2011

ALL TOURISM

TNS

	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Nov					
	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	2010	2011	%ch			
TRIPS (millions)																																										
GB	5.417	6.024	+11.2%	6.949	8.011	+15.3%	8.744	8.029	-8.2%	11.338	11.963	+5.5%	11.796	10.821	-8.3%	10.092	11.314	+12.1%	12.802	14.239	+11.2%	13.943	15.029	+7.8%	9.306	11.133	+19.6%	10.044	11.082	+10.3%	7.034	7.920	+12.6%							107.465	115.564	+7.5%
England	4.534	5.139	+13.3%	5.853	6.690	+14.3%	7.331	6.624	-9.6%	9.193	9.916	+7.9%	9.757	8.818	-9.6%	8.156	9.182	+12.6%	10.329	11.572	+12.0%	11.676	12.209	+4.6%	7.513	9.144	+21.7%	8.297	9.039	+8.9%	5.972	6.786	+13.6%							88.612	95.118	+7.3%
Wales																																										
Scotland																																										
North East																																										
North West																																										
Yorkshire and the Humber																																										
East of England																																										
London																																										
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West Midlands																																										
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BEDNIGHT S (millions)																																										
GB	11.819	14.822	+25.4%	18.230	20.051	+10.0%	23.899	20.677	-13.5%	33.003	37.424	+13.4%	34.739	32.983	-5.1%	33.421	36.091	+8.0%	50.962	53.199	+4.4%	55.332	59.178	+7.0%	28.767	32.445	+12.8%	28.512	30.862	+8.2%	17.44	17.334	-0.6%							336.123	355.065	+5.6%
England	9.512	12.615	+32.6%	14.132	16.411	+16.1%	19.453	16.923	-13.0%	25.667	30.050	+17.1%	27.563	25.963	-5.8%	26.072	28.542	+9.5%	38.612	39.442	+2.1%	44.443	46.254	+4.1%	22.542	25.815	+14.5%	22.833	24.280	+6.3%	13.776	14.380	+4.4%							264.604	280.677	+6.1%
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EXPENDITURE (£ millions)																																										
GB	£726	£923	+27.1%	£1,067	£1,215	+13.9%	£1,460	£1,289	-11.7%	£1,767	£2,043	+15.6%	£1,979	£1,983	+0.2%	£1,789	£2,192	+22.5%	£2,383	£2,947	+23.7%	£2,591	£3,129	+20.8%	£1,830	£2,096	+14.5%	£1,722	£1,847	+7.3%	£1,267	£1,313	+3.6%							£18,581	£20,975	+12.9%
England	£596	£755	+26.7%	£835	£981	+17.5%	£1,185	£1,066	-10.0%	£1,435	£1,645	+14.6%	£1,595	£1,578	-1.1%	£1,398	£1,666	+19.2%	£1,861	£2,344	+26.0%	£2,086	£2,403	+15.2%	£1,448	£1,640	+13.3%	£1,366	£1,430	+4.7%	£1,045	£1,085	+3.8%							£14,852	£16,593	+11.7%
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HEADLINE ANALYSIS:

- GB tourism in November 2011 compared to November 2010 recorded an increase of +13%. Bednights reported a minor decrease of -1%, whereas expenditure increased by +4%.
- It was a poor month for Scottish tourism with trips, bednights and expenditure decreasing by -16%, -40% and -24%, compared to November 2010. In contrast, Wales recorded a positive November with increases evident for trips (+58%), bednights (+48%) and expenditure (+90%). Trends in England were in line with GB results. Across the UK, November 2010 was a much colder and snowy month than was the case in November 2011.
- The YTD change is similar to those reported in previous months. GB trips were ahead of 2010 with an increase of +8% between January and November. Nights and spend also increased by +6% and +13%. These figures indicate a continuing trend towards higher spending trips, most likely due to increasing travel costs.
- Consequently, in 2011, GB trips between January and November increased to 115.6m – the highest level in the last six years. 2010 recorded 107.5m (8.1m fewer trips than 2011). Highlighting that the first eleven months off 2011 have been positive, the number of trips is higher than that recorded during a successful 2009 (112.0m) and previous years – 2008 (104.9m), 2007 (109.7m) and 2006 (110.3m).

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 Travel & Tourism
Fieldwork: 9 November - 18 December
TNS Face-to-Face Omnibus 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-Nov			
	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%	5.552	5.838	+5.2%	7.505	8.006	+6.7%	8.655	9.004	+4.0%	4.763	5.615	+17.9%	4.757	4.844	+1.8%	2.384	2.456	+3.0%				52.617	55.412	+5.3%	
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%	4.322	4.493	+4.0%	5.714	6.293	+10.1%	7.059	7.057	0.0%	3.787	4.504	+18.9%	3.841	3.852	+0.3%	1.934	2.068	+6.9%				41.669	43.752	+5.0%	
BEDNIGHTS (millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Nov			
	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	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%	20.702	22.047	+6.5%	34.760	35.424	+1.9%	38.503	40.876	+6.2%	17.375	19.657	+13.1%	14.943	14.983	+0.3%	6.167	5.845	-5.2%				191.475	200.773	+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%	16.119	16.704	+3.6%	25.105	25.416	+1.2%	30.136	30.572	+1.4%	13.710	15.525	+13.2%	11.683	11.481	-1.7%	4.671	4.753	+1.8%				146.929	152.026	+3.5%	
EXPENDITURE (£ millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD Jan-Nov			
	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	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%	£1,166	£1,366	+17.2%	£1,707	£1,983	+16.2%	£1,911	£2,204	+15.3%	£1,111	£1,245	+12.1%	£969	£967	-0.2%	£513	£512	-0.2%				£11,012	£12,319	+11.9%	
England	£241	£265	+10.0%	£344	£416	+20.9%	£497	£495	-0.4%	£828	£1,018	+22.9%	£951	£936	-1.6%	£900	£998	+10.9%	£1,290	£1,589	+23.2%	£1,525	£1,632	+7.0%	£873	£945	+8.2%	£745	£757	+1.6%	£414	£433	+4.6%				£8,609	£9,482	+10.1%	

HEADLINE ANALYSIS:

- GB holiday trips have seen an increase of +3% on November 2010. Bednights and expenditure reported decreases however of -5% and -0.2%. After experiencing a positive October, Scotland recorded a poor November with a decrease in holiday trips, nights and expenditure (down -28%, -29% and -35%). Although bednights in Wales decreased on November 2010 (-24%), expenditure increased by +14%, suggesting that although the length of the trips decreased, their value increased.
- YTD - GB holiday trips recorded an increase of +5% on 2010, with nights and spend also increasing by +5% and +12% (similar to results seen in previous months).
- GB holiday trips during January to November 2011 (55.4m) outperformed the previous six years with the exception of 2009 (56.2m). Volumes for the other years were: 2010 (52.6m), 2008 (47.8m), 2007 (49.5m) and 2006 (48.8m).

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

TRIPS (millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Nov		
	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	3.937	-11.4%	3.491	3.369	-3.5%	2.840	3.382	+19.1%	3.982	4.183	+5.0%	3.984	4.167	+4.6%	2.793	3.726	+33.4%	3.483	3.836	+10.1%	2.754	3.204	+16.3%				36.601	39.097	+6.8%
England	2.202	2.489	+13.0%	2.762	3.139	+13.6%	2.822	2.477	-12.2%	3.744	3.386	-9.6%	3.021	2.937	-2.8%	2.492	2.918	+17.1%	3.468	3.577	+3.1%	3.479	3.522	+1.2%	2.362	3.136	+32.8%	3.044	3.221	+5.8%	2.467	2.870	+16.3%				31.864	33.67	+5.7%
BEDNIGHTS (millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Nov		
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	2010	2011	%ch	
GB	5.893	6.210	+5.4%	7.977	8.666	+8.6%	8.732	7.761	-11.1%	11.519	11.803	+2.5%	9.345	8.847	-5.3%	7.891	9.395	+19.1%	12.190	12.543	+2.9%	13.122	13.357	+1.8%	7.595	8.477	+11.6%	8.690	10.200	+17.4%	7.108	6.791	-4.5%				100.061	104.051	+4.0%
England	4.891	5.368	+9.8%	6.503	7.441	+14.4%	7.496	6.773	-9.6%	9.254	9.770	+5.6%	7.803	7.414	-5.0%	7.010	8.106	+15.6%	10.114	10.096	-0.2%	10.973	11.450	+4.3%	5.824	6.803	+16.8%	7.089	8.224	+16.0%	5.604	5.937	+5.9%				82.561	87.382	+5.8%
EXPENDITURE (£ millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Nov		
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	2010	2011	%ch	
GB	£186	£254	+36.6%	£297	£316	+6.4%	£304	£299	-1.6%	£408	£376	-7.8%	£339	£354	+4.4%	£323	£339	+5.0%	£418	£514	+23.0%	£438	£487	+11.2%	£309	£435	+40.8%	£372	£384	+3.2%	£326	£306	-6.1%				£3,721	£4,066	+9.3%
England	£154	£213	+38.3%	£246	£279	+13.4%	£257	£252	-1.9%	£333	£315	-5.4%	£295	£297	+0.7%	£272	£280	+2.9%	£353	£424	+20.1%	£353	£394	+11.6%	£255	£343	+34.5%	£320	£307	-4.1%	£278	£271	-2.5%				£3,117	£3,376	+8.3%

HEADLINE ANALYSIS:

- VFR holidays trips increased by +16% compared to November 2010, whereas bednights and expenditure reported a decrease of -5% and -6%. There were some significant variations between countries however with Wales reporting significant increases in trips, nights and expenditure (+49%, +70% and +33%). However, Scotland reported a fall in all three categories (-8%, -63% and -50%). Trends in England were in line with GB with the exception of bednights which has seen a +6% increase.
- YTD trips in GB up to November increased by +7% on 2010. Nights and expenditure also increased by +4% and 9% (similar to results seen in previous months).
- The encouraging first eleven months of 2011 (39.1m) has resulted in a greater number of VFR trips than in 2010 (36.6m), 2009 (37.1m), as well as outperforming 2008 (37.4m). Nonetheless, the best performing years for VFR tourism continue to be 2006 and 2007 (2006 (40.6m) and 2007 (40.2m)).

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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GB Domestic Tourism: Year to Date – 2006-2011

Trips, Bednights & Expenditure, Jan-Nov period

	ALL TOURISM, Jan-Nov period						HOLIDAYS – Jan-Nov period						VFR – Jan-Nov period						Business – Jan-Nov 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	110.316	109.723	104.922	111.972	107.465	115.564	48.833	49.457	47.776	56.204	52.617	55.412	40.569	40.247	37.369	37.074	36.601	39.097	17.120	17.097	16.563	16.034	15.265	17.396
England	90.333	90.716	86.609	93.161	88.612	95.118	37.919	39.025	37.598	44.732	41.669	43.752	34.771	34.965	32.283	32.520	31.864	33.670	14.589	14.341	14.012	13.688	12.601	14.656
	ALL TOURISM, Jan-Nov period						HOLIDAYS – Jan-Nov period						VFR – Jan-Nov period						Business – Jan-Nov 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	350.471	350.025	339.596	356.762	336.123	355.065	184.325	189.035	180.739	209.608	191.475	200.773	112.591	110.018	105.672	101.486	100.061	104.051	41.132	40.960	39.549	38.212	35.660	39.265
England	274.109	278.626	269.847	284.020	264.604	280.677	138.838	143.733	135.933	161.936	146.929	152.026	92.798	93.645	89.643	84.912	82.561	87.382	33.285	33.074	32.521	31.267	28.392	31.895
	ALL TOURISM, Jan-Nov period						HOLIDAYS – Jan-Nov period						VFR – Jan-Nov period						Business – Jan-Nov 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	£18,429	£18,677	£18,852	£19,518	£18,581	£20,975	£9,922	£10,335	£10,374	£11,519	£11,012	£12,319	£3,913	£3,924	£4,010	£3,790	£3,721	£4,066	£4,046	£3,982	£4,015	£3,868	£3,442	£4,109
England	£14,557	£14,880	£15,008	£15,775	£14,852	£16,593	£7,604	£8,056	£8,047	£9,107	£8,609	£9,482	£3,278	£3,290	£3,319	£3,180	£3,117	£3,376	£3,247	£3,204	£3,280	£3,201	£2,798	£3,339

GB Domestic Tourism: Year to Date – 2006-2011

Trip Characteristics, Jan-Nov period



	ALL TOURISM, Jan-Nov period						HOLIDAYS – Jan-Nov period						VFR – Jan-Nov period						Business – Jan-Nov 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	3.18	3.19	3.24	3.19	3.13	3.07	3.77	3.82	3.78	3.73	3.64	3.62	2.78	2.73	2.83	2.74	2.73	2.66	2.40	2.40	2.39	2.38	2.34	2.26
England	3.03	3.07	3.12	3.05	2.99	2.95	3.66	3.68	3.62	3.62	3.53	3.47	2.67	2.68	2.78	2.61	2.59	2.60	2.28	2.31	2.32	2.28	2.25	2.18
	ALL TOURISM, Jan-Nov period						HOLIDAYS – Jan-Nov period						VFR – Jan-Nov period						Business – Jan-Nov 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	£53	£53	£56	£55	£55	£59	£54	£55	£57	£55	£58	£61	£35	£36	£38	£37	£37	£39	£98	£97	£102	£101	£97	£105
England	£53	£53	£56	£56	£56	£59	£55	£56	£59	£56	£59	£62	£35	£35	£37	£37	£38	£39	£98	£97	£101	£102	£99	£105
	ALL TOURISM, Jan-Nov period						HOLIDAYS – Jan-Nov period						VFR – Jan-Nov period						Business – Jan-Nov 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	£167	£170	£180	£174	£173	£182	£203	£209	£217	£205	£209	£222	£96	£97	£107	£102	£102	£104	£236	£233	£242	£241	£225	£236
England	£161	£164	£173	£169	£168	£174	£201	£206	£214	£204	£207	£217	£94	£94	£103	£98	£98	£100	£223	£223	£234	£234	£222	£228