

Great Britain Tourism Survey

GB Domestic Tourism: Monthly Volume & Value 2011

ALL TOURISM

TRIPS (millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Sep		
	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	11.963	+5.5%	11.796	10.821	-8.3%	10.092	11.314	+12.1%	12.802	14.239	+1.2%	13.943	15.029	+7.8%	9.306	11.133	+19.6%								90.387	96.562	+6.8%		
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%	10.392	11.572	+11.4%	11.676	12.209	+4.6%	7.513	9.144	+21.7%								74.343	79.293	+6.7%		
BEDNIGHTS (millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Sep		
	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	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%								290.171	306.869	+5.8%		
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%								227.995	242.016	+6.1%		
EXPENDITURE (£ millions)	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Sep		
	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	£2,043	+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%									£15,592	£17,815	+14.3%	
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%									£12,441	£14,078	+13.2%	

HEADLINE ANALYSIS:

- GB tourism in September 2011 compared to September 2010 recorded a significant increase of +20%. Bednights and expenditure also increased, although to a lesser extent: +13% and +15%, respectively.
- As illustrated on the following slides, holiday tourism trips and VFR trips during the month also increased significantly on September 2010 by +18% and +33%, respectively. However, business tourism has reported a minor decrease (-0.5%) , ending the continuous upward trend seen since June.
- YTD – GB trips were ahead of 2010 with an increase of +7% between Jan-Sep (which is higher than the YTD change seen in Jan-Aug). Nights and spend increased by +6% and +14%, respectively. These figures indicate a continuing trend towards higher spending trips, which is most likely due to increasing travel costs.
- Consequently, in 2011, GB trips during Jan-Sep increased to 96.6m – the highest level in the last six years. 2010 recorded 90.4m (6.2m fewer trips than 2011). Highlighting that the nine months off 2011 have been positive, the number of trips is higher than that recorded during a successful 2009 (94.6m) and previous years – 2008 (88.8m), 2007 (91.1m) and 2006 (92.2m).

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.

All expenditure figures are in
HISTORIC PRICES

Undertaken by TNS-RI Travel & Tourism
Fieldwork: 7 September - 30 October
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-Sep		
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	+1.4%	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%								45.475	48.112	+5.8%		
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%								35.894	37.831	+5.4%		
	January			February			March			April			May			June			July			August			September			October			November			December			YTD – Jan-Sep		
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	-6.8%	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%								170.366	179.944	+5.6%		
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%								130.576	135.791	+4.0%		
	January			February			March			April			May			June			July			August			September			October			November			December			YTD Jan-Sep		
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%	£1,011	£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%								£9,529	£10,840	+13.8%		
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%								£7,450	£8,292	+11.3%		

HEADLINE ANALYSIS:

- GB holiday trips have also seen a significant increase, rising by +18% on September 2010; bednights and expenditure also increased by +13% and +12%, respectively. All three countries have experienced a very good month with increases evident across trips, bednights and expenditures (except Wales expenditure which decreased -3%). Wales trips and Scotland expenditure have increased above average by +31% and +49%, respectively.
- A positive September means that YTD, GB holiday trips recorded an increase of +6% on 2010, with nights and spend also increasing by +6% and +14% respectively (similar to results seen in July).
- GB holiday trips during Jan-Sep 2011 (48.1m) outperformed the previous six years with the exception of 2009 (48.6m) which had seen 500,000 more holiday trips (with the gap closing compared to previous months). The other years recorded – 2010 (45.5m), 2008 (41.3m), 2007 (42.1m) and 2006 (42.0m).

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

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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-Sep		
	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	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%								30.364	32.057	+5.6%		
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%									26.352	27.58	+4.7%	
BEDNIGHTS (millions)																																							
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%								84.264	87.06	+3.3%		
England	4.891	5.368	+9.8%	6.503	7.441	+14.4%	7.496	6.773	-9.6%	9.254	9.707	+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%									69.868	73.221	+4.8%	
EXPENDITURE (£ millions)																																							
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%								£3,023	£3,376	+11.7%		
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%									£2,519	£2,798	+11.1%	

HEADLINE ANALYSIS:

- VFR holidays had an especially good month with trips, bednights and expenditure increasing on 2010 by +33%, +12% and +41%, respectively. The most prominent increases were evident for Wales trips and expenditure, rising by +68% and +100%, respectively, however Wales bednights decreased by -15%.
- Consequently, this has resulted in GB YTD trips for 2011 increasing by +6% on 2010. Nights and expenditure also increased by +3% and 12%, respectively.
- The encouraging nine months of 2011 (32.1m) has resulted in a greater number of VFR trips than in 2010 (30.4m), 2009 (30.8m), as well as outperforming 2008 (30.8m). Nonetheless, the best performing years for VFR tourism were 2006 – 2007 (2007 (32.6m) and 2006 (33.3m)).

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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-Sep		
	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	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	-8.44%	1.301	1.673	+28.6%	1.122	1.673	+49.1%	0.988	1.580	+59.9%	1.516	1.508	-0.5%							12.102	13.451	+11.1%			
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	-7.40%	1.044	1.388	+33.0%	0.964	1.391	+44.3%	0.829	1.382	+66.7%	1.192	1.284	+7.7%							10.012	11.475	+14.6%			
BEDNIGHTS (millions)																																							
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	-15.54%	3.705	3.727	+0.6%	3.582	3.780	+5.5%	2.615	4.067	+55.5%	3.219	3.726	+15.8%							28.354	30.539	+7.7%			
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	-21.34%	2.023	2.913	+44.0%	2.974	2.788	-6.3%	2.275	3.466	+52.4%	2.668	3.065	+14.9%							22.214	25.053	+12.8%			
EXPENDITURE (£ millions)																																							
GB	£207	£296	+43.0%	£244	£310	+27.0%	£494	£319	-35.4%	£316	£303	-4.1%	£356	£380	+6.7%	£270	£446	+65.2%	£235	£399	+69.8%	£206	£392	+90.3%	£366	£371	+1.4%							£2,693	£3,216	+19.4%			
England	£174	£233	+33.9%	£209	£260	+24.4%	£393	£291	-26.0%	£247	£266	+7.7%	£309	£323	+4.5%	£198	£353	+78.3%	£195	£292	+49.7%	£173	£340	+96.5%	£286	£316	+10.5%							£2,184	£2,674	+22.4%			

HEADLINE ANALYSIS:

- Following a positive summer for GB business trips, September reported a decrease of -0.5% on September 2010. However, bednights and expenditure still recorded increases of +16% and +1%, respectively.
- Consequently, YTD, GB business trips, nights and expenditure have reported increases of +11%, +8% and +19%, respectively.
- Business trips during Jan-Sep 2011 (13.5m) are outperforming 2010 (12.1m) and 2009 (13.0m). Levels seen in 2006-2008 were higher – 14.0m for each of the three years.

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Great Britain Tourism Survey

GB Domestic Tourism: Year to Date – 2006-2011

Trips, Bednights & Expenditure, Jan-Sep period

	ALL TOURISM, Jan-Sep period						HOLIDAYS – Jan-Sep period						VFR – Jan-Sep period						Business – Jan-Sep 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	92.206	91.063	88.838	94.568	90.387	96.562	42.017	42.052	41.302	48.616	45.475	48.112	33.254	32.607	30.79	30.778	30.364	32.057	13.952	14.018	13.967	12.98	12.102	13.451
England	75.245	75.264	73.14	78.226	74.343	79.293	32.461	33.293	32.438	38.444	35.894	37.831	28.491	28.263	26.431	26.9	26.352	27.58	11.942	11.762	11.942	11.074	10.012	11.475
	ALL TOURISM, Jan-Sep period						HOLIDAYS – Jan-Sep period						VFR – Jan-Sep period						Business – Jan-Sep 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	303.409	298.097	296.685	311.696	290.171	306.869	164.356	166.243	161.19	187.764	170.366	179.944	94.816	90.688	89.543	86.341	84.264	87.06	34.175	33.247	33.462	31.382	28.354	30.539
England	236.485	236.802	235.139	246.439	227.995	242.016	123.505	126.405	121.026	144.215	130.576	135.791	78.046	77.015	75.567	71.742	69.868	73.221	27.576	27.158	27.826	25.714	22.214	25.053
	ALL TOURISM, Jan-Sep period						HOLIDAYS – Jan-Sep period						VFR – Jan-Sep period						Business – Jan-Sep 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	£15,626	£15,705	£16,131	£16,702	£15,592	£17,815	£8,614	£8,887	£9,013	£10,054	£9,529	£10,840	£3,242	£3,140	£3,316	£3,201	£3,023	£3,376	£3,340	£3,314	£3,425	£3,168	£2,693	£3,216
England	£12,289	£12,463	£12,838	£13,429	£12,441	£14,078	£6,581	£6,917	£6,999	£7,920	£7,450	£8,292	£2,699	£2,619	£2,722	£2,671	£2,519	£2,798	£2,688	£2,655	£2,823	£2,605	£2,184	£2,674

Great Britain Tourism Survey

GB Domestic Tourism: Year to Date – 2006-2011

Trip Characteristics, Jan-Sep period

	ALL TOURISM, Jan-Sep period						HOLIDAYS – Jan-Sep period						VFR – Jan-Sep period						Business – Jan-Sep 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	3.29	3.27	3.34	3.30	3.21	3.18	3.91	3.95	3.90	3.86	3.75	3.74	2.85	2.78	2.91	2.81	2.78	2.72	2.45	2.37	2.40	6.65	2.34	2.27
England	3.14	3.15	3.21	3.15	3.07	3.05	3.80	3.80	3.73	3.75	3.64	3.59	2.74	2.72	2.86	2.67	2.65	2.65	2.31	2.31	2.33	6.48	2.22	2.18
	ALL TOURISM, Jan-Sep period						HOLIDAYS – Jan-Sep period						VFR – Jan-Sep period						Business – Jan-Sep 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	£52	£53	£54	£54	£54	£58	£52	£53	£56	£54	£56	£60	£34	£35	£37	£37	£36	£39	£98	£100	£102	£37	£95	£105
England	£52	£53	£55	£54	£55	£58	£53	£55	£58	£55	£57	£61	£35	£34	£36	£37	£36	£38	£97	£98	£101	£36	£98	£107
	ALL TOURISM, Jan-Sep period						HOLIDAYS – Jan-Sep period						VFR – Jan-Sep period						Business – Jan-Sep 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	£169	£172	£182	£177	£173	£184	£205	£211	£218	£207	£210	£225	£97	£96	£108	£104	£100	£105	£239	£236	£245	£244	£223	£239
England	£163	£166	£176	£172	£167	£178	£203	£208	£216	£206	£208	£219	£95	£93	£103	£99	£96	£101	£225	£226	£236	£235	£218	£233