

UK TOURISM SURVEY - July 2009 SUMMARY OF RESULTS

1. Headlines

- In the month of July, domestic tourism trips in the UK increased by 20% compared to July 2008 – the strongest performance in this month since July 2005, despite above average rainfall.
- The number of bednights increased by 22%, and spend by 13%.
- Within England, trips increased by 24% while nights were up by 26% and spend by 16%.
- In the first seven months of this year, overall trip numbers increased by 4% and spend also increased marginally (+1%).
- In the past 12 months, 120.6 million overnight trips were taken in the UK, 2.5 million fewer than in the 12 months from August 2007 to July 2008, a drop of 2%.

2. Trip Characteristics

- The overall increase in trips in 2009 (+4%) is driven by the upsurge in the number of “pure holiday” trips which have increased significantly between January and July (by +18% in the UK and +20% in England).
- However, business trips declined (-9% in both the UK and England) as did visits to friends and family albeit to a lesser extent during the same period (-4% in the UK and -1% in England).
- Specific demographic groups helped drive the growth of domestic overnight trips. In particular, trips amongst households where there are children increased by 10% in the first seven months of the year and the number of trips taken by 35-44 year olds rose by 13%.
- Seaside locations have continued to benefit from the upsurge in domestic tourism with 21% growth in volume terms compared to January-July 2008. Countryside trips also rose by 5% but trips to small towns fell slightly (-3%).
- Self-catering accommodation has continued the upward trend seen in previous months with a 28% increase in trip volume for the seven months of the year. Within this sector camping & caravanning experienced a 26% increase in the number of trips during this period.
- Growth in serviced accommodation is much more modest, 3%, reflecting the reliance of parts of this sector on business travel.

3. Overseas Travel by UK Residents

- In July, UK residents made 14% fewer trips abroad than in July 2008, and from January – July 2009, trips were down by 17% - it seems clear that some people are substituting domestic breaks for overseas travel.

4. Other Tourism Surveys

- In the month of July, occupancy in UK serviced accommodation increased by 1% vs. the previous year, up to 55%.
- Inbound travel to the UK continued to be impacted by the economic downturn, with visitor numbers falling 14% in the month of July and 17% in the first seven months of the year.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
July 09									
UK	12.0	14.5	+20%	45.3	55.1	+22%	2,421	2,742	+13%
England	9.4	11.6	+24%	33.2	41.8	+26%	1,837	2,128	+16%
Jan – July 2009									
UK	67.6	70.5	+4%	215.6	221.8	+3%	12,328	12,475	+1%
England	54.9	57.7	+5%	169.5	175.6	+4%	9,666	9,871	+2%

Purpose of Trip – July 2009

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	6.5	8.6	+32%	30.9	38.2	+24%	1,514	1,890	+25%
Business	1.7	1.6	-10%	3.6	3.9	+8%	426	342	-20%
VFR	3.6	3.9	+11%	10.0	12.0	+20%	449	461	+3%
England									
Holiday	4.8	6.7	+40%	21.7	28.9	+33%	1130	1,453	+29%
Business	1.5	1.3	-12%	3.0	3.0	-1%	349	279	-20%
VFR	2.9	3.3	+14%	7.9	9.2	+17%	334	353	+6%

Purpose of Trip – Year to Date (January – July 2009)

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	29.2	34.6	+18%	108.7	126.4	+16%	6,458	7,070	+9%
Business	11.5	10.5	-9%	26.7	25.8	-3%	2,862	2,644	-8%
VFR	24.6	23.7	-4%	71.3	64.7	-9%	2,695	2,509	-7%
England									
Holiday	22.6	27.1	+20%	80.5	97.0	+21%	4,951	5,458	+10%
Business	9.7	8.8	-9%	22.2	21.0	-6%	2,321	2,140	-8%
VFR	20.6	20.4	-1%	59.3	53.5	-10%	2,136	2,061	-4%

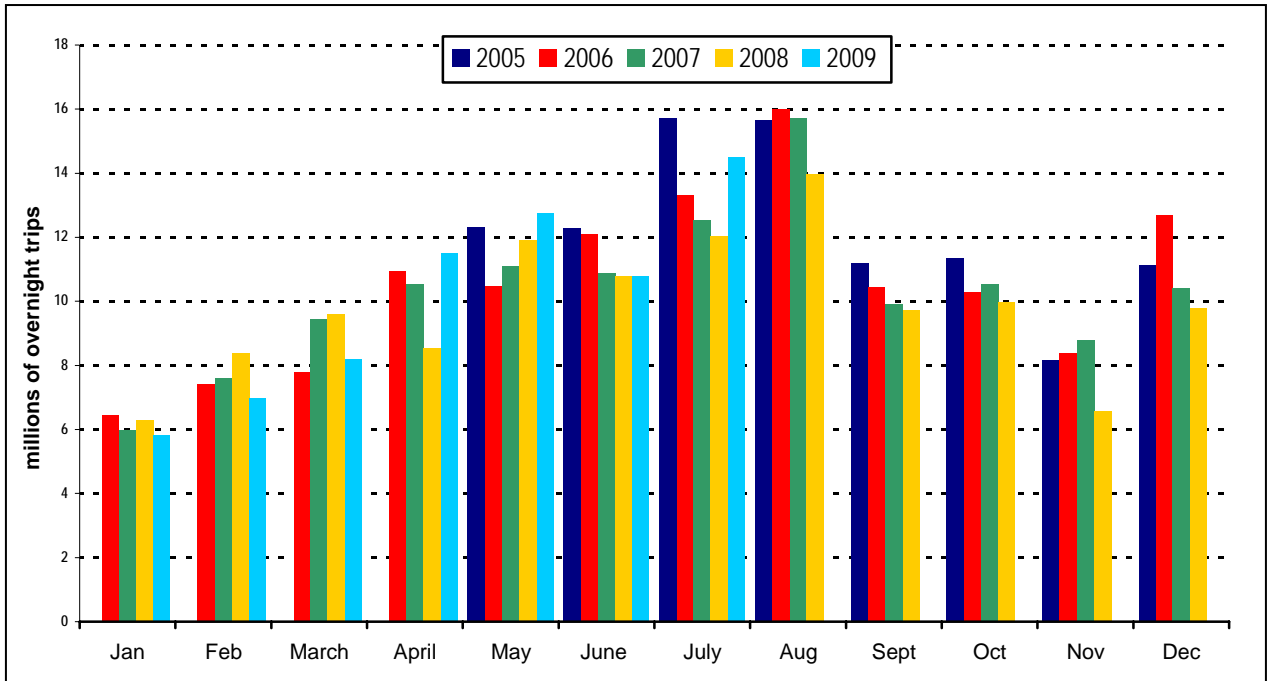
Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2008	2009	% +/-	2008	2009	% +/-
July 2009	6.8	5.9	-14%	3.7	3.1	-18%
Jan – July 2009	39.7	33.0	-17%	20.9	17.2	-18%
Aug 08 – Jul 09	70.9	62.3	-12%	36.6	33.1	-10%

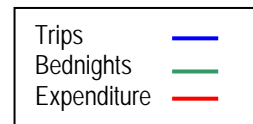
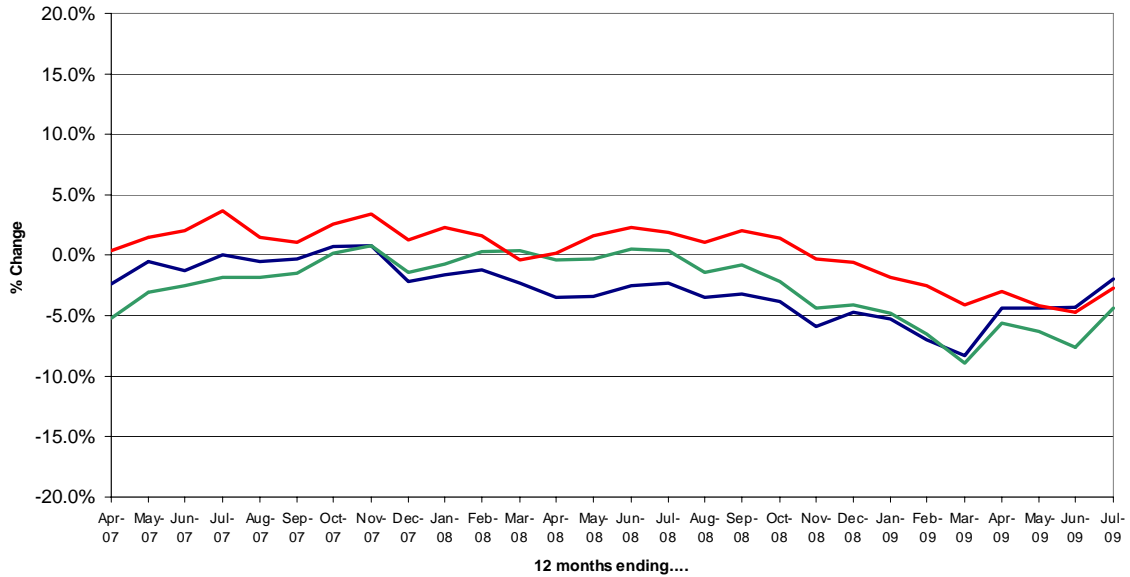
TREND CHARTS



UK All Trips – Domestic Trip Volume by Month



UK All Trips - Annual Percentage Change



Year on Year Comparison, by Trip Characteristic

Important Note

The analysis on the following page shows year-on-year comparisons across a number of trip characteristics, considering:

- Month (July 2008 vs July 2009)
- Year to date (January - July 2008 vs January - July 09)
- 12 months (August 2007 – July 2008 vs August 2008 – July 2009)

Percentage changes are colour coded:

Green indicates a change of over 5 percentage points **better** than the average across all trips (so a drop of -4% would be shaded green if all trips had declined by 10% over the same period)

Yellow indicates a change of within +/- 5 percentage points of the average

Orange indicates a change of more than 5 percentage points **worse** than the average

This analysis does **not necessarily indicate differences that are statistically significant**. For many of the categories included, particularly when reviewing single month data, changes would need to be much larger than the +/-5% cut-off point used to be statistically significant, and should always be reviewed in the context of the longer term trends. Even so, we feel that this analysis is helpful in understanding some of the market dynamics behind the overall monthly figures.

Sample sizes (underlying numbers of trips) are indicated on the spreadsheet – those with a very low base (fewer than 75 trips) have been “greyed out” to highlight that results should be treated with caution.

YEAR-ON-YEAR COMPARISON, BY TRIP CHARACTERISTIC

UKTS: Comparisons with equivalent periods, 2008

Comparisons with equivalent periods, 2008

LEGEND: Above Average Performance, Average Performance, Below Average Performance

NOTE: In the tables below, 'average performance' refers to the total trips/nights/expenditure to either UK or England in each time period. Those cells marked 'above average performance' indicate where the percentage change is more than 5 percentage points above the average; those marked 'below average performance' indicate where the percentage change is more than 5 percentage points below the average. These changes are not necessarily statistically significant - they only indicate those cells where changes are further away from the average. The numbers of unweighted trips are also displayed to indicate where sample sizes are relatively small. Where there are 75 or fewer unweighted trips, the % change figures have been 'greyed out' to indicate that they should be treated with caution.

	United Kingdom											
	Month: July 2009			Unweighted Trips	YTD: January - July 2009			Unweighted Trips	12 month rolling August 2008 - July 2009			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	20.3%	21.8%	13.3%		4.3%	2.8%	1.2%		-2.0%	-4.5%	-2.7%	
PURPOSE:												
Pure Holiday	32.5%	23.6%	24.8%	1317	18.3%	16.3%	9.5%	5367	7.6%	4.6%	3.2%	8814
- 1-3 nights holiday	41.7%	38.0%	19.8%	667	19.1%	16.5%	4.1%	3238	9.2%	7.2%	2.2%	5240
- 4+ nights holiday	23.2%	19.8%	27.6%	649	17.1%	16.2%	15.3%	2129	5.0%	3.4%	4.2%	3574
VFR (on holiday)	9.2%	27.1%	3.6%	345	-3.2%	-3.4%	-7.9%	1952	-2.9%	-6.3%	-7.2%	3524
HOLIDAY (TOTAL)	26.9%	24.2%	21.6%	1661	11.8%	11.0%	6.2%	7319	4.4%	1.6%	1.2%	12338
VFR (non-holiday)	12.2%	8.5%	0.6%	265	-3.9%	-16.7%	-5.6%	1703	-13.4%	-18.8%	-13.1%	3000
VFR (TOTAL)	10.5%	20.2%	2.7%	609	-3.5%	-9.3%	-6.9%	3655	-8.1%	-11.7%	-9.9%	6524
Business	-10.1%	7.9%	-19.7%	198	-8.9%	-3.2%	-7.6%	1310	-9.9%	-9.7%	-8.4%	2089
RDAs:												
Adv West Midlands	6.6%	13.6%	-3.6%	105	-1.9%	-16.7%	-10.4%	672	-8.2%	-16.6%	-14.9%	1097
East of England	4.6%	-4.8%	-4.3%	175	7.4%	0.7%	-8.0%	916	-8.2%	-12.5%	-13.6%	1480
East Midlands	57.3%	54.1%	17.0%	150	11.2%	8.0%	0.8%	668	5.9%	9.8%	2.4%	1153
London	5.9%	6.3%	-6.3%	128	-5.9%	-16.3%	-5.8%	884	-4.2%	-10.6%	-11.1%	1502
North West	22.4%	18.4%	13.7%	225	6.9%	7.9%	6.0%	1077	5.8%	1.5%	3.3%	1949
ONE North East	21.2%	7.5%	17.4%	54	2.2%	-1.3%	-4.2%	291	11.3%	3.0%	10.0%	559
South East England	41.8%	56.8%	17.9%	325	8.9%	10.8%	2.9%	1557	0.8%	-1.9%	1.2%	2564
South West	20.2%	18.9%	28.4%	420	6.8%	8.5%	9.2%	1837	-3.6%	-6.4%	-2.1%	2986
Yorkshire Forward	35.1%	66.8%	21.6%	189	9.1%	13.6%	13.3%	921	-2.5%	-3.1%	3.7%	1472
LOCATION TYPE:												
Seaside	36.7%	33.4%	46.4%	668	21.3%	26.9%	17.7%	2525	6.4%	8.6%	5.3%	4135
Large city/ large town	24.6%	13.2%	0.2%	685	0.8%	-8.4%	-6.1%	3896	-3.4%	-9.9%	-7.5%	6573
Small town	11.5%	12.4%	1.9%	464	-3.1%	-5.3%	-5.1%	2389	-4.9%	-7.5%	-4.9%	4178
Countryside/ village	6.6%	21.7%	2.7%	428	5.3%	3.1%	7.7%	2068	-2.7%	-7.3%	1.9%	3404
AGE:												
16-24	1.6%	-1.8%	-1.1%	208	-2.1%	-16.3%	-6.0%	1191	-10.4%	-20.8%	-9.1%	2081
25-34	12.7%	-36.1%	18.0%	343	2.0%	-29.3%	5.5%	1677	-3.9%	-29.9%	-0.8%	2783
35-44	44.2%	50.7%	35.8%	561	13.3%	15.8%	6.2%	2386	2.5%	3.3%	1.2%	4043
45-54	22.1%	27.6%	-4.9%	370	2.7%	3.9%	-2.2%	1795	-1.5%	-4.5%	-5.9%	2951
55+	12.5%	12.1%	10.8%	691	2.4%	0.8%	-0.2%	3539	-0.8%	-3.0%	-2.2%	5963
SEG:												
AB	29.5%	22.8%	14.0%	734	4.5%	7.5%	-1.1%	3450	0.5%	0.2%	-2.0%	5716
C1	4.4%	20.3%	15.9%	646	1.0%	1.0%	6.4%	3285	-4.4%	-6.1%	-2.1%	5416
C2	45.2%	28.3%	25.3%	407	7.6%	0.5%	-0.6%	1878	-1.7%	-5.9%	-2.0%	3236
DE	11.1%	16.6%	-3.8%	386	7.3%	-0.4%	-1.9%	1974	-3.1%	-8.7%	-7.0%	3453
CHILDREN IN H/H:												
Any	26.7%	21.6%	26.1%	795	9.8%	10.8%	2.8%	3642	-0.1%	-1.2%	-4.2%	6236
None	17.1%	21.9%	8.4%	1378	1.9%	-0.5%	0.6%	6945	-2.8%	-6.0%	-2.1%	11585
ACCOMMODATION:												
Commercial accom	24.4%	26.7%	14.4%	1367	9.2%	9.6%	3.4%	6181	2.1%	-0.3%	-0.7%	10101
- Serviced accom	11.6%	18.7%	3.5%	697	2.9%	0.6%	-4.0%	3996	-0.4%	-1.6%	-4.7%	6611
- Hotel/motel/guesthouse	8.6%	19.4%	0.1%	582	2.5%	-0.3%	-5.2%	3520	-0.1%	-1.5%	-5.1%	5802
- Bed & Breakfast	26.1%	15.4%	26.8%	123	3.2%	5.9%	7.2%	493	-3.7%	-2.1%	-1.3%	844
Total self-catering rented	42.9%	31.9%	28.9%	636	27.5%	23.8%	24.0%	1989	7.6%	4.1%	10.2%	3124
- Camping & Caravanning (inc. owned caravans)	43.5%	25.3%	19.9%	561	25.8%	22.7%	19.8%	1605	11.8%	8.5%	12.1%	2546
- Other self-catering rented	35.2%	39.0%	35.8%	186	23.5%	21.7%	23.1%	740	2.8%	0.6%	7.8%	1173
Hostels	5.0%	-7.8%	-11.8%	19	-6.9%	-23.1%	11.1%	138	10.4%	-4.3%	16.5%	238
Own home/friends/relatives'	14.9%	12.6%	11.9%	783	-1.6%	-5.0%	-5.9%	4271	-7.0%	-9.2%	-9.3%	7500

	England											
	Month: July 2009			Unweighted Trips	YTD: January - July 2009			Unweighted Trips	12 month rolling July 2008 - July 2009			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	23.5%	25.9%	15.8%		5.2%	3.6%	2.1%		-1.4%	-4.8%	-2.8%	
PURPOSE:												
Pure Holiday	40.1%	33.1%	28.6%	1029	19.7%	20.6%	10.2%	4205	7.5%	5.4%	1.5%	6845
- 1-3 nights holiday	43.4%	40.7%	14.0%	522	18.9%	16.4%	1.6%	2546	8.8%	7.0%	0.9%	4108
- 4+ nights holiday	36.4%	30.9%	37.7%	506	21.2%	22.9%	20.4%	1658	5.4%	4.7%	2.2%	2731
VFR (on holiday)	9.0%	20.6%	12.1%	279	-0.2%	-4.5%	-2.8%	1670	-1.1%	-8.7%	-6.4%	2968
HOLIDAY (TOTAL)	32.2%	30.8%	26.0%	1307	13.3%	13.3%	7.7%	5873	4.8%	1.3%	0.0%	9815
VFR (non-holiday)	20.8%	11.0%	-2.9%	232	-2.5%	-16.1%	-4.5%	1469	-11.6%	-16.4%	-8.3%	2634
VFR (TOTAL)	14.1%	17.0%	5.7%	510	-1.3%	-9.7%	-3.5%	3140	-6.4%	-12.1%	-7.2%	5603
Business	-12.5%	-1.1%	-20.1%	165	-8.8%	-5.6%	-7.8%	1104	-9.1%	-9.9%	-7.3%	1741
RDAs:												
Adv West Midlands	6.6%	13.6%	-3.6%	105	-1.9%	-16.7%	-10.4%	672	-8.2%	-16.6%	-14.9%	1097
East of England	4.6%	-4.8%	-4.3%	175	7.4%	0.7%	-8.0%	916	-8.2%	-12.5%	-13.6%	1480
East Midlands	57.3%	54.1%	17.0%	150	11.2%	8.0%	0.8%	668	5.9%	9.8%	2.4%	1153
London	5.9%	6.3%	-6.3%	128	-5.9%	-16.3%	-5.8%	884	-4.2%	-10.6%	-11.1%	1502
North West	22.4%	18.4%	13.7%	225	6.9%	7.9%	6.0%	1077	5.8%	1.5%	3.3%	1949
ONE North East	21.2%	7.5%	17.4%	54	2.2%	-1.3%	-4.2%	291	11.3%	3.0%	10.0%	559
South East England	41.8%	56.8%	17.9%	325	8.9%	10.8%	2.9%	1557	0.8%	-1.9%	1.2%	2564
South West	20.2%	18.9%	28.4%	420	6.8%	8.5%	9.2%	1837	-3.6%	-6.4%	-2.1%	2986
Yorkshire Forward	35.1%	66.8%	21.6%	189	9.1%	13.6%	13.3%	921	-2.5%	-3.1%	3.7%	1472
LOCATION TYPE:												
Seaside	37.4%	31.3%	45.2%	511	24.7%	30.9%	21.1%	1994	7.6%	9.9%	7.4%	3271
Large city/ large town	31.7%	22.3%	3.8%	586	1.2%	-8.4%	-6.2%	3310	-2.3%	-10.4%	-7.0%	5575
Small town	18.0%	27.0%	14.7%	372	-2.1%	-3.7%	-2.8%	1936	-4.1%	-8.2%	-5.5%	3345
Countryside/ village	5.0%	19.8%	-2.7%	331	6.6%	2.8%	7.3%	1660	-3.9%	-8.1%	-1.4%	2705
AGE:												
16-24	-1.3%	-2.4%	-16.2%	165	-3.4%	-19.5%	-9.2%	978	-9.2%	-21.6%	-8.6%	1747
25-34	21.1%	26.3%	12.7%	287	5.2%	11.4%	6.0%	1380	-1.8%	0.5%	0.4%	2273
35-44	53.2%	62.4%	54.4%	449	15.2%	16.0%	11.2%	1951	3.0%	0.6%	2.4%	3273
45-54	13.2%	11.5%	-8.5%	279	2.0%	1.6%	-1.9%	1432	-2.3%	-8.4%	-6.4%	2355
55+	18.8%	18.9%	20.4%	561	3.3%	3.0%	0.2%	2937	-0.3%	-1.9%	-3.9%	4895
SEG:												
AB	36.4%	23.9%	21.8%	615	5.9%	6.5%	0.4%	2866	1.2%	-2.1%	-2.8%	4731
C1	-2.2%	20.0%	10.8%	496	-0.5%	1.6%	3.0%	2688	-3.8%	-5.6%	-3.3%	4447
C2	60.8%	40.6%	32.5%	322	11.9%	3.4%	5.6%	1523	-0.2%	-6.4%	0.3%	2611
DE	21.0%	26.7%	-4.3%	305	9.5%	1.9%	1.5%	1580	-3.8%	-6.9%	-5.1%	2715
CHILDREN IN H/H:												
Any	39.0%	32.2%	39.2%	646	12.2%	10.3%	7.0%	2975	1.2%	-3.7%	-3.2%	5066
None	16.4%	22.4%	7.7%	1086	2.3%	0.9%	0.4%	5694	-2.6%	-5.3%	-2.6%	9469
ACCOMMODATION:												
Commercial accom	26.3%	29.7%	14.8%	1083	10.5%	12.5%	4.0%	4993	2.4%	-0.8%	-1.6%	8083
- Serviced accom	14.5%	22.6%	3.0%	565	4.0%	2.5%	-4.0%	3273	0.5%	-1.0%	-5.1%	5384
- Hotel/motel/guesthouse	8.0%	17.0%	-3.4%	469	3.2%	0.5%	-5.9%	2896	0.5%	-1.8%</		