

UK TOURISM SURVEY - APRIL 2009 SUMMARY OF RESULTS

1. Headlines

- **Note: Easter fell in March in 2008 and April in 2009 – monthly results are therefore not directly comparable!**
- In the month of April, domestic tourism trips in the UK increased by 35% compared to April 2008, while nights and spend rose by 39% and 18% respectively.
- Within England, trips increased by 34% while nights were up by 33% and spend by 17%.
- While the later Easter holiday is a significant factor in this rise, it is worth noting that the absolute number of trips (11.5 million) is also higher than numbers recorded in either April 2006 or 2007.
- Between January and April 2009 trip numbers overall have remained fairly stable (-1% in the UK and unchanged in England compared to the same period in 2008).
- In the past 12 months, 117.3 million overnight trips were taken in the UK, 5.4 million fewer than in the 12 months from May 2007 to April 2008, a drop of 4%.

2. Trip Characteristics

- During the first four months of the year 'pure' holiday trips outperformed the market (+15% in the UK and +13% in England).
- Business visits declined steeply (-13%) and VFR also fell (-7%) in the same period.
- Reflecting the increase in holiday trips and decline in business and VFR, performance also varied widely by location type with increases in trips to the seaside (+16%) and countryside/villages (+12%) while there was a fall in urban travel (large city/town and small town trips fell by -10% and -3% respectively).
- There were also differences in accommodation type, which seem to confirm reports of 'trading down' by domestic tourists. While trips using serviced accommodation fell by 3% between January and April, trips using self-catering accommodation rose by 27% and camping and caravanning trips also increased by 27%.
- There are indications that the economic downturn is most affecting households at the lower end of the income scale – over the past 12 months, trip-taking has fallen back most dramatically among C2DE households (-9%), while among more affluent AB's, travel is down by only 1%.

3. Overseas Travel by UK Residents

- In April, UK residents made 10% fewer trips abroad than in April 2008, and from January – April 2009, trips were down by 18% - so far this year domestic travel is proving to be more resilient than outbound tourism.

4. Other Tourism Surveys

- In the month of April, occupancy in UK serviced accommodation rose by 2% vs. the previous year, up to 43%. Occupancy in seaside and countryside/village locations rose but fell in cities and large towns reflecting the same pattern seen in the UKTS results.
- Inbound travel to the UK has continued to be impacted by the economic downturn, with visitor numbers falling 3% in the month of April and 10% in the first four months of the year.

KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
April 09									
UK	8.5	11.5	+35%	26.6	37.0	+39%	1,656	1,951	+18%
England	7.1	9.4	+34%	21.9	29.2	+33%	1,340	1,563	+17%
Jan – April 2009									
UK	32.9	32.5	-1%	93.3	92.0	-1%	5,611	5,330	-5%
England	27.0	27.0	0%	76.1	74.3	-2%	4,469	4,262	-5%

Purpose of Trip – April 2009

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	3.5	5.9	+67%	11.8	20.7	+75%	803	1,142	+42%
Business	1.6	1.4	-11%	4.4	3.4	-23%	420	343	-18%
VFR	3.2	4.0	+23%	9.5	12.3	+29%	393	432	+10%
England									
Holiday	2.8	4.5	+61%	9.4	15.8	+69%	627	888	+42%
Business	1.3	1.2	-7%	3.9	3.0	-23%	356	302	-15%
VFR	2.7	3.4	+25%	8.0	9.7	+22%	325	341	+5%

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

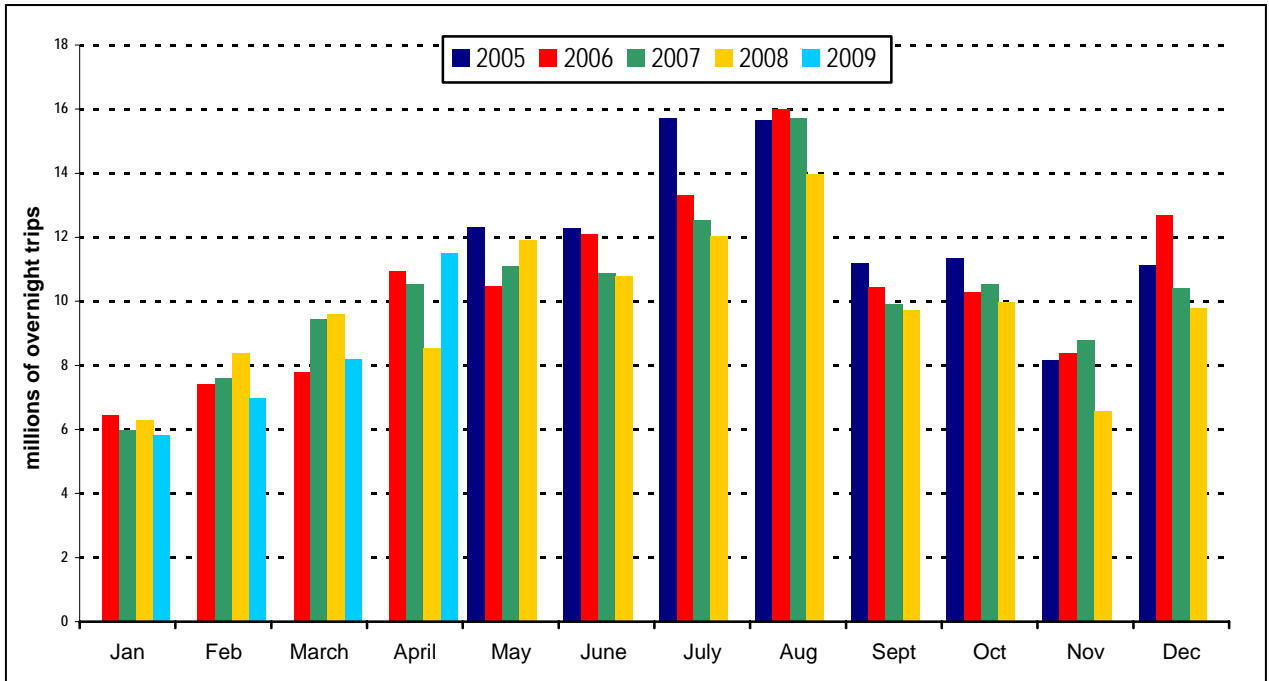
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	11.7	13.4	+15%	35.5	42.5	+20%	2,483	2,572	+4%
Business	6.3	5.5	-13%	14.6	12.9	-11%	1,553	1,363	-12%
VFR	13.6	12.7	-7%	38.0	34.1	-10%	1,402	1,252	-11%
England									
Holiday	9.3	10.5	+13%	27.8	32.9	+18%	1,937	2,006	+4%
Business	5.2	4.7	-11%	12.2	10.7	-12%	1,281	1,092	-15%
VFR	11.4	11.1	-3%	32.0	28.7	-10%	1,112	1,049	-6%

Outbound Travel – UK Residents

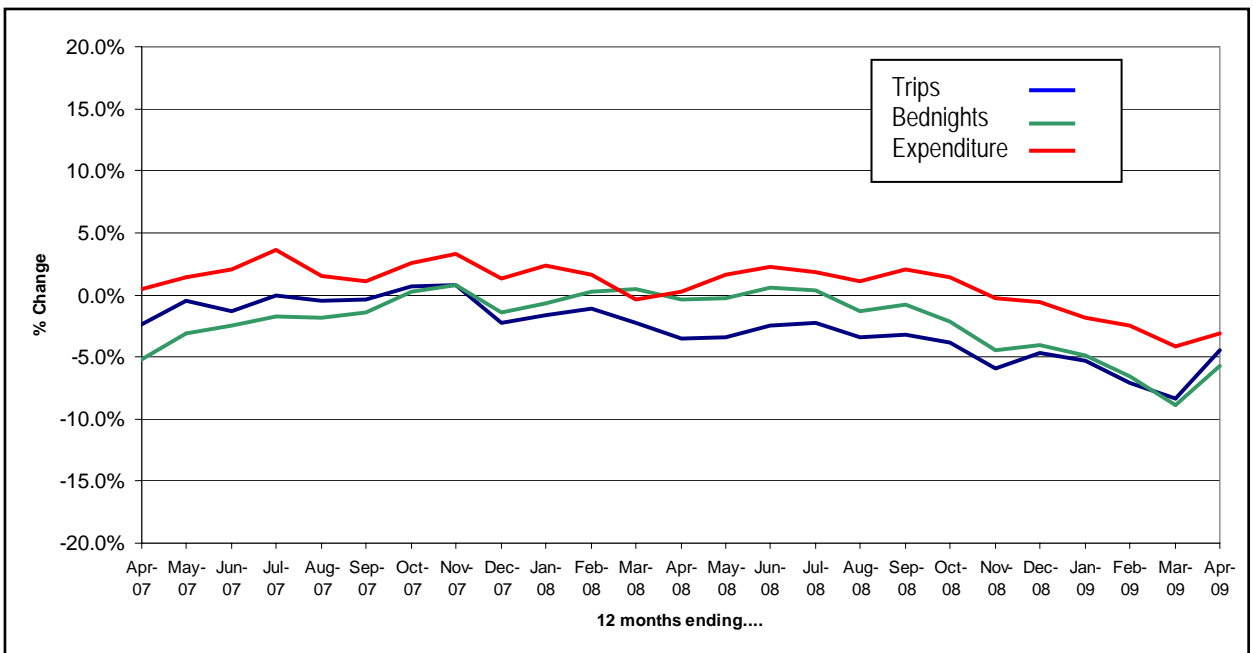
	TRIPS (MILLIONS)			SPEND (£BN)		
	2008	2009	% +/-	2008	2009	% +/-
April 2009	5.8	5.2	-10%	2.8	2.4	-13%
Jan – April 2009	20.1	16.5	-18%	10.6	9.0	-15%
May 08 – Apr 09	64.4	65.5	+2%	35.7	35.2	-2%

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 (April 2008 vs April 2009)
- Year to date (January - April 2008 vs January - April 09)
- 12 months (May 2007 – April 2008 vs May 2008 – April 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

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: April 2009			Unweighted Trips	YTD: January - April 2009			Unweighted Trips	12 month rolling (May 2008-April 2009)			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	34.6%	39.3%	17.8%	1787	-1.1%	-1.4%	-5.0%	4770	-4.4%	-5.8%	-3.1%	17403
PURPOSE:												
Pure Holiday	66.6%	75.4%	42.2%	937	15.0%	19.9%	3.6%	2047	-1.7%	-2.4%	-1.4%	8308
- 1-3 nights holiday	65.4%	67.5%	37.6%	562	14.5%	10.6%	-0.6%	1391	3.0%	0.6%	1.5%	4912
- 4+ nights holiday	68.9%	80.2%	48.0%	374	16.2%	27.8%	11.3%	657	-3.0%	-3.8%	-11.1%	3396
VFR (on holiday)	45.9%	58.0%	18.8%	374	-6.0%	-4.5%	-12.0%	1021	-3.7%	-5.3%	-2.6%	3538
HOLIDAY (TOTAL)	60.2%	70.1%	37.1%	1311	7.2%	10.9%	-0.2%	3068	-2.3%	-3.2%	-1.6%	11846
VFR (non-holiday)	0.9%	-5.5%	-1.8%	253	-7.5%	-17.2%	-9.0%	914	-16.9%	-14.4%	-12.3%	3020
VFR (TOTAL)	23.1%	29.1%	9.9%	627	-6.7%	-10.3%	-10.7%	1935	-10.3%	-9.3%	-7.0%	6558
Business	-10.9%	-23.2%	-18.3%	181	-12.5%	-11.2%	-12.2%	653	-5.4%	-10.2%	-2.9%	2120
RDAs:												
Adv West Midlands	22.1%	8.0%	-7.8%	120	-0.2%	-13.1%	-7.2%	362	-8.2%	-6.1%	-8.5%	1106
East of England	52.0%	20.9%	-21.3%	132	9.8%	1.3%	-6.9%	416	-10.8%	-10.6%	-9.6%	1472
East Midlands	34.3%	15.5%	4.7%	101	7.9%	-5.7%	1.9%	294	-0.6%	3.7%	0.3%	1107
London	24.5%	28.6%	33.3%	160	-12.2%	-19.7%	-13.3%	464	2.2%	-0.7%	-5.8%	1492
North West	22.0%	49.5%	-10.3%	181	0.2%	11.3%	4.3%	476	-0.1%	0.7%	4.1%	1897
ONE North East	33.8%	6.2%	21.9%	43	0.8%	-1.1%	-10.1%	137	6.9%	1.1%	10.5%	571
South East England	30.0%	16.9%	19.4%	263	-0.4%	-4.9%	-8.7%	686	-6.8%	-5.7%	-0.8%	2432
South West	52.6%	66.3%	53.9%	340	-1.1%	6.7%	-0.5%	756	-10.0%	-9.9%	-6.2%	2890
Yorkshire Forward	12.9%	26.8%	24.6%	153	1.5%	-2.4%	2.2%	428	-8.8%	-15.2%	-4.2%	1401
LOCATION TYPE:												
Seaside	76.3%	86.7%	44.6%	445	15.7%	27.5%	4.9%	883	-7.3%	-4.9%	-5.9%	3869
Large city/ large town	10.6%	12.6%	3.0%	614	-9.8%	-16.1%	-11.9%	1926	-6.4%	-5.7%	-3.3%	6346
Small town	49.8%	44.7%	23.3%	428	-3.1%	-5.7%	-6.4%	1146	-6.2%	-5.7%	-5.3%	4231
Countryside/ village	37.6%	32.0%	22.1%	353	11.6%	12.3%	12.8%	916	-4.1%	-6.4%	4.4%	3390
AGE:												
16-24	11.1%	-13.7%	21.4%	174	-5.4%	-30.7%	-9.4%	580	-10.2%	-16.4%	-5.0%	2089
25-34	37.3%	-12.2%	7.3%	287	-9.1%	-24.2%	-8.0%	746	-8.9%	-27.4%	-8.1%	2740
35-44	48.1%	72.8%	10.0%	430	3.5%	8.5%	0.3%	1041	-4.7%	-7.1%	-2.1%	3826
45-54	27.6%	16.6%	8.8%	280	-2.8%	-2.8%	-8.1%	800	-3.8%	-6.4%	-3.6%	2817
55+	37.6%	47.8%	38.9%	614	3.8%	8.0%	-3.3%	1603	1.2%	0.7%	0.1%	5929
SEG:												
AB	32.2%	50.6%	14.1%	580	-0.5%	7.0%	-7.4%	1572	-0.5%	0.3%	0.2%	5550
C1	37.2%	30.3%	21.6%	548	0.1%	-1.4%	2.6%	1501	-3.5%	-7.4%	-4.4%	5301
C2	22.2%	27.0%	3.1%	303	-6.1%	-9.5%	-14.0%	803	-9.2%	-6.9%	-6.5%	3128
DE	49.4%	44.9%	39.4%	356	0.0%	-10.9%	-4.7%	894	-9.7%	-13.0%	-5.2%	3423
CHILDREN IN H/H:												
Any	49.7%	63.3%	11.1%	644	-1.1%	3.2%	-6.4%	1567	-7.3%	-9.0%	-7.6%	5979
None	28.2%	29.4%	20.4%	1143	-1.1%	-3.2%	-4.5%	3203	-3.1%	-4.2%	-1.2%	11424
ACCOMMODATION:												
Commercial accom	37.9%	37.3%	18.7%	1016	2.0%	4.9%	-3.7%	2559	-2.8%	-5.5%	-2.7%	9675
- Serviced accom	30.9%	22.4%	13.3%	668	-2.7%	-5.7%	-9.7%	1913	-2.6%	-3.9%	-3.1%	6471
- Hotel/motel/guesthouse	32.9%	23.4%	15.2%	591	-1.9%	-5.1%	-9.5%	1734	-1.5%	-2.9%	-2.0%	5705
- Bed & Breakfast	15.6%	16.5%	-0.9%	80	-9.6%	-10.9%	-11.6%	185	-8.7%	-9.3%	-11.8%	812
- Self-catering rented	74.7%	74.0%	39.5%	320	27.4%	40.5%	28.2%	541	-5.7%	-9.5%	-1.7%	2827
Camping & Caravanning	119.3%	103.5%	60.0%	435	27.2%	35.0%	27.3%	385	-0.1%	-1.6%	4.5%	2314
Hostels	-5.0%	-29.4%	-28.9%	24	-9.8%	-26.8%	0.0%	71	19.1%	14.5%	16.2%	242
Own home/friends'/relatives'	33.1%	44.9%	15.7%	764	-4.4%	-5.7%	-7.0%	2155	-7.5%	-6.2%	-4.8%	7495

	England											
	Month: April 2009			Unweighted Trips	YTD: January - April 2009			Unweighted Trips	12 month rolling (May 2008-April 2009)			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	33.5%	32.9%	16.6%	1465	0.1%	-2.4%	-4.6%	3968	-4.2%	-6.4%	-3.4%	14174
PURPOSE:												
Pure Holiday	61.4%	68.8%	41.6%	723	13.4%	18.2%	3.6%	1603	-2.7%	-4.0%	-2.8%	6388
- 1-3 nights holiday	57.9%	61.7%	31.8%	430	11.2%	7.1%	-4.2%	1079	1.7%	-0.7%	1.0%	3824
- 4+ nights holiday	67.7%	72.9%	54.6%	293	19.1%	27.7%	19.6%	526	-4.4%	-5.7%	-13.1%	2558
VFR (on holiday)	49.5%	44.9%	12.9%	328	-1.0%	-5.5%	-5.8%	900	-2.3%	-7.1%	-4.3%	2975
HOLIDAY (TOTAL)	57.6%	61.0%	35.1%	1051	7.8%	9.0%	1.3%	2501	-2.5%	-4.9%	-3.1%	9365
VFR (non-holiday)	0.0%	-7.2%	-5.8%	212	-5.3%	-16.1%	-5.6%	790	-15.1%	-12.0%	-6.3%	2650
VFR (TOTAL)	24.6%	22.4%	4.9%	540	-3.1%	-10.3%	-5.7%	1690	-8.8%	-9.3%	-5.2%	5626
Business	-7.0%	-22.3%	-15.2%	161	-11.1%	-12.0%	-14.8%	555	-3.9%	-10.1%	-3.0%	1776
RDAs:												
Adv West Midlands	22.1%	8.0%	-7.8%	120	-0.2%	-13.1%	-7.2%	362	-8.2%	-6.1%	-8.5%	1106
East of England	52.0%	20.9%	-21.3%	132	9.8%	1.3%	-6.9%	416	-10.8%	-10.6%	-9.6%	1472
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South East England	30.0%	16.9%	19.4%	263	-0.4%	-4.9%	-8.7%	686	-6.8%	-5.7%	-0.8%	2432
South West	52.6%	66.3%	53.9%	340	-1.1%	6.7%	-0.5%	756	-10.0%	-9.9%	-6.2%	2890
Yorkshire Forward	12.9%	26.8%	24.6%	153	1.5%	-2.4%	2.2%	428	-8.8%	-15.2%	-4.2%	1401
LOCATION TYPE:												
Seaside	75.6%	79.5%	44.6%	353	17.6%	29.6%	6.9%	710	-8.6%	-7.0%	-7.7%	3028
Large city/ large town	11.9%	11.0%	2.8%	524	-8.9%	-16.3%	-12.0%	1644	-4.7%	-6.3%	-2.8%	5389
Small town	41.6%	32.7%	12.5%	337	-1.3%	-5.4%	-4.7%	947	-5.4%	-6.1%	-5.3%	3384
Countryside/ village	39.7%	26.5%	30.0%	291	14.4%	7.5%	12.6%	747	-4.8%	-5.5%	4.1%	2695
AGE:												
16-24	3.8%	-21.5%	12.7%	140	-4.2%	-33.5%	-8.1%	480	-7.9%	-14.7%	-2.6%	1774
25-34	41.6%	52.8%	10.5%	234	-5.7%	5.6%	-7.7%	622	-8.1%	-5.7%	-4.2%	2219
35-44	52.3%	71.5%	19.0%	352	4.5%	6.8%	4.4%	866	-5.7%	-10.1%	-3.5%	3075
45-54	30.0%	12.5%	9.4%	231	-3.1%	-4.7%	-9.9%	647	-4.5%	-9.5%	-5.8%	2255
55+	31.2%	35.8%	24.7%	507	4.4%	5.5%	-4.9%	1358	1.7%	0.9%	-1.5%	4852
SEG:												
AB	22.9%	30.4%	4.4%	475	1.0%	5.0%	-8.6%	1319	0.1%	-0.6%	-2.0%	4578
C1	40.2%	31.0%	27.6%	456	1.0%	-0.3%	1.6%	1266	-2.0%	-5.8%	-2.4%	4406
C2	28.9%	30.6%	6.9%	247	-5.2%	-8.9%	-10.0%	653	-11.2%	-11.3%	-8.8%	2474
DE	53.2%	44.0%	45.9%	286	1.3%	-15.1%	-0.2%	720	-10.7%	-13.3%	-3.3%	2668
CHILDREN IN H/H:												
Any	54.3%	55.1%	14.8%	529	0.1%	-1.9%	-4.0%	1298	-7.6%	-12.2%	-9.0%	4814
None	25.2%	24.5%	17.2%	936	0.1%	-2.5%	-4.9%	2669	-2.6%	-3.7%	-1.1%	9352
ACCOMMODATION:												
Commercial accom	36.2%	36.0%	19.7%	827	2.3%	5.7%	-4.8%	2087	-3.6%	-6.5%	-4.0%	7694
- Serviced accom	27.0%	23.0%	13.3%	541	-2.9%	-5.4%	-12.0%	1561	-2.6%	-3.9%	-3.7%	5234
- Hotel/motel/guesthouse	29.7%	25.1%	16.8%	482	-1.3%	-4.2%	-11.6%	1422	-1.3%	-2.8%	-3.1%	4642
- Bed & Breakfast	6.7%	9.8%	-12.1%	62	-16.4%	-14.1%	-16.2%	144	-11.1%	-10.3%	-9.1%	630
- Self-catering rented	77.0%	71.6%	42.6%	263	31.4%	48.0%	38.5%	439				