

UK TOURISM SURVEY - April 2010 SUMMARY OF RESULTS

1. Headlines

- During the month of April, domestic tourism trips in the UK grew by 2% compared to the same month in 2009.
- The total number of bednights fell by 8% and total expenditure dropped by 3%.
- Within England, the number of trips were down by 2% against April 2009 while nights and spend also fell by 12% and 7% respectively.
- In the first four months of 2010 overall trip numbers were up 3% in the UK compared to January-April 2009, while trips in England were unchanged in the same period.
- In the past 12 months, 127.1 million overnight trips were taken in the UK, 9.7 million more than in the 12 months from May 2008 to April 2009, an increase of 8%.

2. Trip Characteristics

- Between January and April 2010 there was a 3% growth in overall UK trips compared to the same period in 2009, while spend was unchanged during the same period. However, differences are apparent by journey purpose.
- The increase was mainly driven by growth in visits to friends and family for holiday purposes (trips increased by +11% in the UK and +3% in England). Business trips also showed an improvement on the first four months of 2009 (+9% in UK and +2% in England), though levels remain well below pre-recession volumes.
- At the same time, "pure holiday" trips fell by 4%, in particular there was a noticeable decline in longer holiday trips which declined by 7%. "Pure holiday" bednights fell by 9% reflecting a move to a shorter length of stay. However, "pure holiday" spend fell only slightly -1% indicating a higher average spend per night.
- Reflecting both the drop in "pure holiday" trips, visits to seaside and countryside locations each fell by 4% in the UK. Meanwhile, the growth in business trips probably helped drive the increase in trips to more urban locations (visits to large city/large town and small town locations were up by 6% and a 7% respectively).
- Similarly, the relative improvement in business trips may have helped contribute to the growth in trips involving an overnight stay in serviced accommodation (+6% in the UK and +3% in England), while the decrease in "pure holiday" trips may have been a factor in the slight drop in self-catering accommodation (-1% in the UK and -6% in England).
- Note: the Easter weekend fell between 2nd and 5th April in 2010, and across much of the country the weather was unseasonably cold and wet.

3. Overseas Travel by UK Residents

- In April, UK residents made 17% fewer trips abroad than in April 2009, spending 4% less. Between January and April, trips fell by 12% and spend by 9%. [Note that the eruption of Iceland's Eyjafjallajökull volcano disrupted flights, with the whole of UK airspace closed from 15th April to 20th April].

4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 43% for the month of April (unchanged compared with April '09).
- In the VisitEngland Business Confidence Monitor, when asked about the April-May period, showed that 32% of accommodation operators said that they had more visitors than in the same period in 2009 and 35% had the same level.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
April '10									
UK	11.5	11.8	2%	37.0	34.0	-8%	1,951	1,886	-3%
England	9.4	9.2	-2%	29.2	25.6	-12%	1,563	1,449	-7%
Jan – April '10									
UK	32.5	33.6	3%	92.0	89.4	-3%	5,330	5,349	0%
England	27.0	27.1	0%	74.3	69.2	-7%	4,262	4,150	-3%

Purpose of Trip – April 2010

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	5.9	5.4	-7%	20.7	18.3	-12%	1,142	1,076	-6%
Business	1.4	1.5	11%	3.4	3.3	-4%	343	355	3%
VFR	4.0	4.6	15%	12.3	11.9	-3%	432	424	-2%
England									
Holiday	4.5	4.1	-9%	15.8	13.6	-14%	888	835	-6%
Business	1.2	1.2	-2%	3.0	2.2	-26%	302	252	-17%
VFR	3.4	3.7	10%	9.7	9.3	-5%	341	335	-2%

Purpose of Trip – Year to Date (January – April 2010)

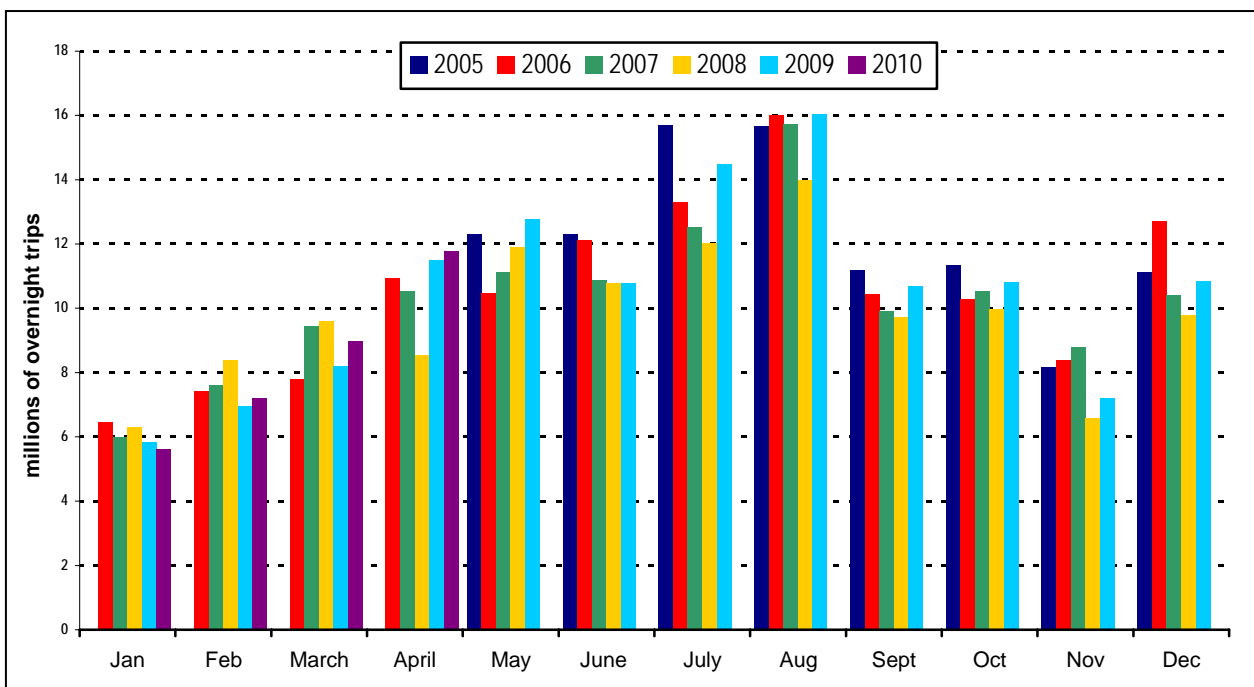
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	13.4	13.0	-4%	42.5	38.7	-9%	2,572	2,552	-1%
Business	5.5	5.9	8%	12.9	12.6	-3%	1,363	1,362	0%
VFR	12.7	13.7	8%	34.1	35.4	4%	1,252	1,264	1%
England									
Holiday	10.5	10.0	-5%	32.9	29.4	-11%	2,006	1,959	-2%
Business	4.7	4.7	2%	10.7	9.5	-12%	1,092	1,052	-4%
VFR	11.1	11.6	5%	28.7	28.4	-1%	1,049	1,009	-4%

Outbound Travel – UK Residents

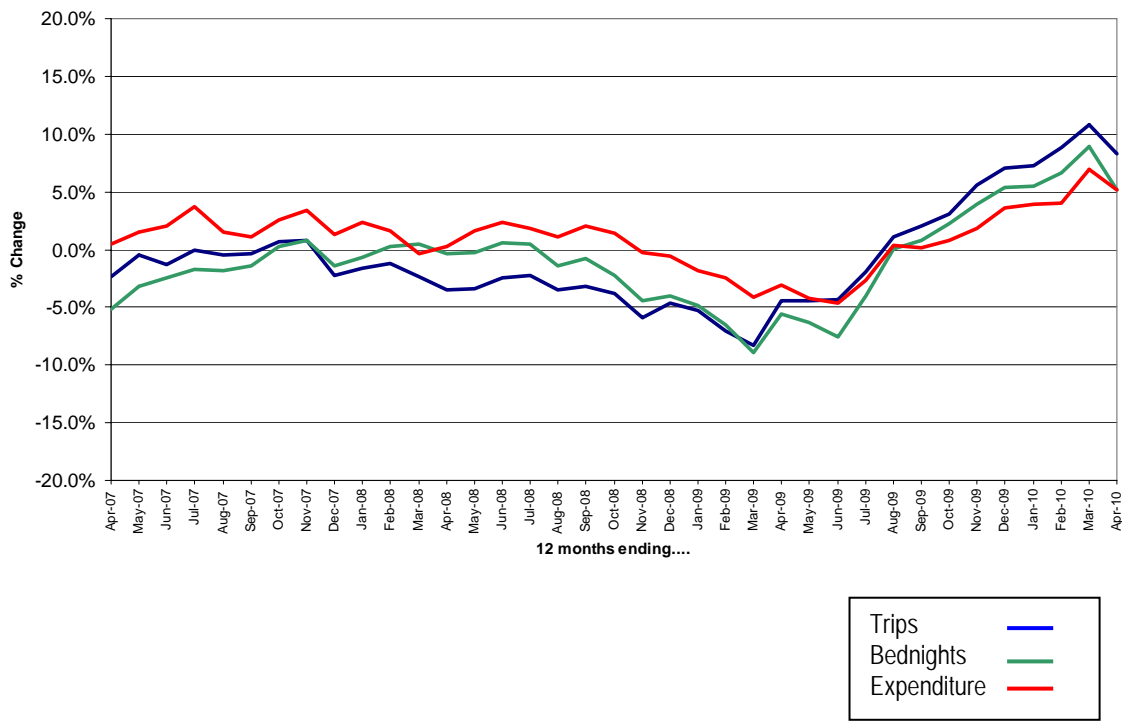
	TRIPS (MILLIONS)			SPEND (£BN)		
	2009	2010	% +/-	2009	2010	% +/-
April 2010	5.2	4.3	-17%	2.6	2.5	-4%
Jan – Apr '10	16.4	14.4	-12%	9.3	8.5	-9%
May '09 – Apr '10	65.3	56.6	-13%	35.6	30.9	-13%

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 2009 vs April 2010)
- Year to date (January – April 2009 vs January – April 2010)
- 12 months (May 2008 – April 2009 vs May 2009 – April 2010)

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, 2009

LEGEND: Above Average Performance (Green), Average Performance (Yellow), Below Average Performance (Red)

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

Comparisons with equivalent periods, 2009

	United Kingdom											
	Month: April 2010			Unweighted Trips	YTD: January - April 2010			Unweighted Trips	12 month rolling May 2009 - April 2010			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	2.3%	-8.1%	-3.3%	1783	3.3%	-2.7%	0.4%	4960	8.3%	5.3%	5.1%	18750
PURPOSE:												
Pure Holiday	-7.5%	-12.0%	-5.8%	849	-3.5%	-9.0%	-0.8%	1975	12.1%	9.8%	9.7%	9211
- 1-3 nights holiday	-4.0%	0.3%	-2.0%	539	-2.0%	-43.1%	2.5%	1380	12.7%	13.1%	6.3%	5524
- 4+ nights holiday	-13.3%	-18.8%	-10.2%	311	-7.2%	9.5%	-6.1%	595	11.1%	8.3%	13.3%	3687
VFR (on holiday)	1.6%	-18.8%	-13.5%	368	11.1%	4.4%	5.6%	1128	5.8%	5.6%	0.2%	3736
HOLIDAY (TOTAL)	-4.9%	-13.9%	-7.2%	1217	1.3%	-4.8%	0.6%	3102	10.2%	8.7%	8.0%	12947
VFR (non-holiday)	33.5%	28.7%	16.9%	338	4.6%	2.7%	-5.1%	964	4.6%	-2.7%	-4.3%	3110
VFR (TOTAL)	14.8%	-3.0%	-1.9%	706	7.9%	3.7%	1.0%	2092	5.2%	2.2%	-1.8%	6846
Business	10.9%	-4.3%	3.5%	191	8.5%	-2.7%	-0.1%	744	5.7%	1.4%	1.0%	2257
RDAs:												
Adv West Midlands	4.6%	-10.6%	-10.4%	127	-9.3%	-13.4%	-16.3%	349	5.7%	-2.6%	3.0%	1166
East of England	5.5%	6.0%	22.9%	132	-14.8%	-15.2%	-10.1%	365	7.5%	2.1%	2.6%	1538
East Midlands	29.5%	28.9%	19.1%	135	9.9%	20.5%	-3.7%	341	7.3%	6.1%	-2.3%	1186
London	-10.2%	-21.3%	-19.3%	142	12.6%	2.6%	8.9%	544	3.6%	-6.0%	2.2%	1572
North West	3.5%	-20.0%	16.9%	185	2.7%	-7.3%	2.3%	508	6.5%	-0.3%	3.0%	2006
ONE North East	18.7%	26.8%	41.0%	47	9.3%	13.4%	43.5%	154	-3.8%	-1.5%	-4.2%	558
South East England	-8.7%	-20.0%	-16.2%	236	7.5%	-3.2%	0.2%	725	14.2%	11.6%	13.0%	2792
South West	-18.3%	-24.4%	-15.1%	264	-7.9%	-17.6%	-8.4%	671	9.3%	8.5%	11.6%	3115
Yorkshire Forward	7.8%	-3.3%	-34.3%	164	-3.8%	-12.6%	-22.5%	433	9.5%	8.6%	2.8%	1583
LOCATION TYPE:												
Seaside	-3.9%	-18.4%	-7.0%	417	-4.1%	-18.5%	-6.4%	835	13.0%	9.5%	12.1%	4259
Large city/ large town	6.9%	-2.1%	-0.9%	636	6.2%	3.1%	4.4%	2096	10.7%	1.8%	1.1%	7053
Small town	2.2%	3.9%	2.3%	441	6.7%	6.7%	-1.5%	1237	2.5%	1.6%	3.0%	4322
Countryside/ village	-5.4%	-13.6%	-10.5%	315	-4.2%	-5.6%	-1.5%	867	6.3%	9.7%	8.6%	3592
AGE:												
16-24	20.7%	13.1%	27.8%	218	11.5%	19.3%	5.9%	642	-0.2%	-1.3%	-7.9%	2072
25-34	-4.5%	-34.0%	-13.7%	282	5.4%	-9.7%	-10.3%	812	15.6%	-22.4%	7.4%	3031
35-44	0.1%	-14.5%	2.7%	427	3.1%	-3.7%	5.9%	1088	10.3%	7.0%	5.8%	4167
45-54	8.7%	12.2%	0.6%	298	3.1%	-2.9%	-1.1%	864	10.6%	12.6%	7.9%	3284
55+	-2.5%	-12.6%	-13.8%	557	-1.5%	-9.2%	1.2%	1555	5.1%	1.1%	6.4%	6197
SEG:												
AB	13.5%	-3.4%	8.6%	604	6.5%	-5.5%	5.1%	1684	7.2%	0.3%	2.5%	6096
C1	-10.2%	-16.5%	-19.0%	516	-2.8%	-6.4%	-9.6%	1536	6.8%	9.1%	8.0%	5819
C2	11.6%	13.0%	22.3%	299	11.5%	17.7%	25.9%	816	10.6%	4.6%	6.8%	3238
DE	-6.4%	-20.3%	-24.5%	365	0.3%	-7.7%	-18.0%	924	11.7%	9.4%	4.4%	3597
CHILDREN IN H/H:												
Any	13.4%	-3.0%	15.8%	710	14.1%	4.4%	9.1%	1808	13.5%	11.0%	7.0%	6699
None	-3.1%	-10.7%	-10.1%	1074	-1.2%	-5.7%	-2.8%	3152	5.9%	2.7%	4.4%	12052
ACCOMMODATION:												
Commercial accom	1.8%	-1.8%	0.2%	1009	3.6%	-1.9%	1.6%	2669	10.7%	8.1%	6.9%	10656
- Serviced accom	5.9%	9.7%	1.5%	690	6.4%	7.2%	3.8%	2050	8.6%	6.7%	4.1%	6989
- Hotel/motel/guesthouse	5.3%	10.4%	1.2%	607	6.4%	7.9%	4.1%	1857	8.6%	6.6%	3.3%	6166
- Bed & Breakfast	8.2%	5.5%	4.6%	84	5.5%	1.5%	0.4%	196	5.9%	7.2%	10.5%	856
Total self-catering rented	-3.6%	-9.6%	3.6%	301	-1.2%	-11.6%	-3.4%	538	20.0%	15.2%	16.1%	3375
- Camping & Caravanning (inc. owned caravans)	-14.6%	-28.0%	-25.5%	231	-9.0%	-19.0%	-14.2%	353	14.5%	8.5%	9.9%	2637
- Other self-catering rented	3.7%	10.1%	25.1%	127	0.2%	-10.8%	-1.3%	278	19.9%	16.0%	18.0%	1305
Hostels	-11.8%	-30.8%	-21.9%	13	-9.6%	-14.9%	15.7%	64	-10.6%	-16.9%	1.8%	215
Own home/friends'/relatives'	1.0%	-15.2%	-14.2%	752	0.6%	-5.7%	-5.8%	2182	5.0%	0.4%	-1.1%	7826

	England											
	Month: April 2010			Unweighted Trips	YTD: January - April 2010			Unweighted Trips	12 month rolling May 2009 - April 2010			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-2.0%	-12.2%	-7.3%	1400	0.4%	-6.9%	-2.6%	4012	7.9%	4.7%	5.8%	15207
PURPOSE:												
Pure Holiday	-9.4%	-14.0%	-6.0%	641	-5.4%	-10.6%	-2.3%	1517	13.2%	12.4%	11.1%	7151
- 1-3 nights holiday	-4.7%	-1.0%	-2.1%	409	-2.8%	-55.6%	0.2%	1061	13.7%	14.8%	5.6%	4339
- 4+ nights holiday	-17.3%	-21.2%	-10.3%	233	-11.5%	-15.7%	-6.8%	455	12.2%	11.2%	17.3%	2805
VFR (on holiday)	-10.9%	-26.0%	-19.5%	283	2.7%	-4.1%	-3.6%	820	4.3%	3.7%	1.3%	3097
HOLIDAY (TOTAL)	-9.9%	-17.5%	-8.6%	924	-2.5%	-8.4%	-2.6%	2435	10.3%	10.0%	9.2%	10248
VFR (non-holiday)	39.9%	38.8%	26.7%	298	7.5%	3.6%	-4.4%	856	5.0%	-3.6%	-7.2%	2740
VFR (TOTAL)	9.7%	-4.7%	-1.8%	581	5.0%	-0.8%	-3.8%	1778	4.6%	0.6%	-2.5%	5841
Business	-2.4%	-25.8%	-16.6%	149	1.8%	-11.9%	-3.7%	594	3.5%	-3.2%	2.1%	1852
RDAs:												
Adv West Midlands	4.6%	-10.6%	-10.4%	127	-9.3%	-13.4%	-16.3%	349	5.7%	-2.6%	3.0%	1166
East of England	5.5%	6.0%	22.9%	132	-14.8%	-15.2%	-10.1%	365	7.5%	2.1%	2.6%	1538
East Midlands	29.5%	28.9%	19.1%	135	9.9%	20.5%	-3.7%	341	7.3%	6.1%	-2.3%	1186
London	-10.2%	-21.3%	-19.3%	142	12.6%	2.6%	8.9%	544	3.6%	-6.0%	2.2%	1572
North West	3.5%	-20.0%	16.9%	185	2.7%	-7.3%	2.3%	508	6.5%	-0.3%	3.0%	2006
ONE North East	18.7%	26.8%	41.0%	47	9.3%	13.4%	43.5%	154	-3.8%	-1.5%	-4.2%	558
South East England	-8.7%	-20.0%	-16.2%	236	7.5%	-3.2%	0.2%	725	14.2%	11.6%	13.0%	2792
South West	-18.3%	-24.4%	-15.1%	264	-7.9%	-17.6%	-8.4%	671	9.3%	8.5%	11.6%	3115
Yorkshire Forward	7.8%	-3.3%	-34.3%	164	-3.8%	-12.6%	-22.5%	433	9.5%	8.6%	2.8%	1583
LOCATION TYPE:												
Seaside	-7.8%	-19.0%	-6.4%	318	-4.4%	-16.2%	-4.8%	669	14.3%	12.3%	13.5%	3371
Large city/ large town	3.0%	-5.5%	-3.7%	523	4.4%	-2.8%	2.6%	1760	9.9%	-0.1%	1.9%	5947
Small town	-0.5%	-2.7%	-0.7%	338	1.5%	-0.5%	-7.5%	973	2.1%	1.7%	4.0%	3444
Countryside/ village	-12.4%	-20.6%	-24.1%	240	-9.9%	-10.6%	-9.5%	665	4.7%	6.5%	7.1%	2810
AGE:												
16-24	24.0%	24.3%	33.8%	180	12.5%	22.1%	5.7%	536	-3.3%	-3.8%	-10.2%	1706
25-34	-6.0%	-19.9%	-12.8%	227	6.1%	-4.5%	-7.6%	681	18.0%	13.2%	9.1%	2505
35-44	-7.7%	-21.3%	-9.2%	323	-3.7%	-13.6%	-4.9%	846	9.3%	4.8%	6.5%	3319
45-54	-1.6%	-6.6%	-12.9%	223	-2.4%	-9.3%	-3.2%	662	8.2%	8.8%	8.1%	2573
55+	-5.1%	-13.4%	-10.9%	448	-3.4%	-12.1%	-0.3%	1293	6.1%	2.2%	8.3%	5119
SEG:												
AB	7.8%	-7.4%	9.0%	469	3.0%	-9.7%	3.8%	1367	6.2%	-2.0%	4.7%	4984
C1	-12.0%	-18.2%	-24.7%	421	-4.9%	-9.6%	-12.1%	1268	4.1%	6.9%	5.6%	4713
C2	2.5%	-3.3%	8.8%	224	5.5%	0.7%	14.5%	628	13.1%	5.8%	8.6%	2617
DE	-7.5%	-18.6%	-25.5%	290	0.7%	-1.7%	-18.3%	747	14.8%	13.6%	6.2%	2882
CHILDREN IN H/H:												
Any	10.6%	-1.3%	16.8%	569	13.1%	4.4%	7.7%	1484	14.5%	12.6%	11.1%	5437
None	-8.2%	-17.3%	-15.8%	834	-4.9%	-11.3%	-6.4%	2531	4.9%	1.3%	3.8%	9771
ACCOMMODATION:												
Commercial accom	-1.4%	-8.1%	-4.9%	800	0.7%	-7.3%	-1.0%	2138	11.3%	8.4%	8.0%	8553
- Serviced accom	5.0%	6.8%	-3.6%	557	3.4%	1.9%	1.1%	1640	8.8%	7.0%	4.8%	5689
- Hotel/motel/guesthouse	3.5%	4.5%	-5.8%	489	2.7%	1.1%	0.4%	1484	8.8%	6.4%	4.0%	5047
- Bed & Breakfast	14.0%	23.4%	17.5%	70	7.3%	8.8%	10.2%	157	5.3%	10.4%	12.1%	663
Total self-catering rented	-11.2%	-20.7%	-5.4%	229	-5.5%	-19.4%	-8.5%	421	22.6%	16.6%	18.1%	2630
- Camping & Caravanning (inc. owned caravans)	-17.2%	-32.6%	-29.7%	17								