

### UK TOURISM SURVEY - August 2009 SUMMARY OF RESULTS

#### 1. Headlines

- In the month of August, domestic tourism trips in the UK increased by 15% compared to August 2008 the best performance in this month since the current survey began.
- The number of bednights and total expenditure both increased by 15% a positive development as previously this year spend growth has lagged behind volume growth.
- Within England, trips increased by 15% while nights were up by 15% and spend by 17%.
- In the first eight months of this year, overall trip numbers increased by 6% and spend also increased (+4%).
- In the past 12 months, 122.6 million overnight trips were taken in the UK, 1.4 million more than in the 12 months from September 2007 to August 2008, an increase of 1%.

### 2. Trip Characteristics

- In 2009 the growth in trips overall (+6%) is driven by the number of "pure holiday" trips which increased considerably between January and August (by +18% in the UK and +19% in England).
- At the same time, business trips have decreased (-8% in the UK and -9% in England) in the first eight months of the year. The number of visits to friends and family is unchanged over this period, but saw considerable growth in the month of August, increasing by 21% in the UK and 25% in England.
- The growth in domestic holiday trips benefited both short and longer trip lengths (1-3 night trips rose by 18% while 4+ nights grew by 17%) during the first eight months of the year.
- In terms of type of location visited, trips to seaside locations have grown phenomenally (+21%) while trips to the countryside have also increased significantly (+8%). Urban locations have benefited less from the growth of domestic tourism (there was a small +3% increase in trips to large cities/towns while trips to small towns fell by -2%).
- There were notable increases amongst certain demographic sub-groups trips made by 35-44s grew by 12% and there was a 10% increase amongst households where there are children between January and August 2009.
- Within accommodation, the self-catering sector continued to grow (+23%) while serviced accommodation increased by 6% overall in the first eight months of 2009.

#### 3. Overseas Travel by UK Residents

- In August, UK residents made 11% fewer trips abroad than in August 2008 but spent 22% less, showing that travellers' desire to save money also applies to overseas trips. From January – August 2009, trips were down by 16%, with spend down 19%.

### 4. Other Tourism Surveys

- The Quarter 3 England Attractions Monitor found that visits to English visitor attractions were up by 5% in July-September this year, and up 6% in the month of August.
- The Monitor also found that 42% of attractions said they were more optimistic about the coming quarter than during the same period in 2008, and only 13% were more negative.

### **KEY MEASURES**



# Year on Year Comparison – All Trips

	TRIF	PS (MILLIC	ONS)	NIGH	TS (MILLI	ONS)	SPEND (£M)			
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-	
August '09										
UK	13.9	16.1	+15%	56.2	64.9	+15%	£2,650	£3,042	+15%	
England	10.8	12.5	+15%	40.8	46.9	+15%	£1,947	£2,274	+17%	
Jan – Aug'09										
UK	81.6	86.6	+6%	273.1	287.5	+5%	£14,981	£15,521	+4%	
England	65.7	70.2	+7%	211.1	222.7	+6%	£11,614	£12,148	+5%	

## Purpose of Trip – August 2009

	TRIPS (MILLIONS)			NIGH	HTS (MILL	IONS)	SPEND (£M)			
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-	
UK										
Holiday	8.7	9.9	15%	39.4	45.6	16%	1,882	2,283	21%	
Business	1.3	1.3	-2%	3.7	3.2	-14%	302	252	-17%	
VFR	3.8	4.6	21%	12.3	15.2	24%	429	477	11%	
England										
Holiday	6.5	7.4	15%	28.1	33.0	17%	1,380	1,709	24%	
Business	1.1	1.0	-8%	2.7	2.2	-18%	219	185	-16%	
VFR	3.1	3.9	25%	9.3	11.2	21%	326	357	10%	

## Purpose of Trip – Year to Date (January – August 2009)

	TRI	PS (MILLIC	NS)	NIGH	ITS (MILL	IONS)	SPEND (£M)			
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-	
UK										
Holiday	37.9	44.5	17%	148.4	172.5	16%	8,342	9,354	12%	
Business	12.8	11.7	-8%	30.3	29.0	-4%	3,164	2,896	-8%	
VFR	28.3	28.3	0%	83.5	80.1	-4%	3,124	2,989	-4%	
England										
Holiday	29.1	34.5	19%	108.6	130.1	20%	6,331	7,166	13%	
Business	10.7	9.8	-9%	24.9	23.2	-7%	2,541	2,324	-9%	
VFR	23.7	24.2	2%	68.5	64.9	-5%	2,462	2,422	-2%	

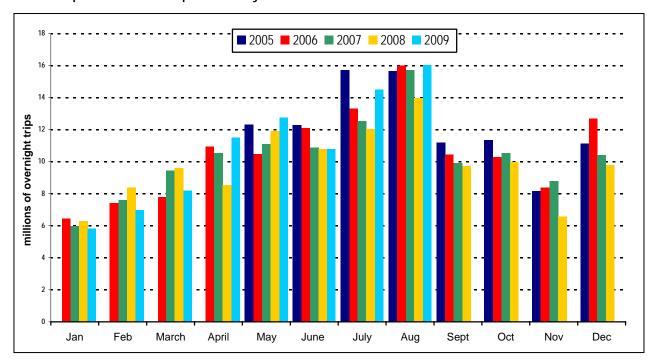
### **Outbound Travel - UK Residents**

	-	TRIPS (MILLION:	S)	SPEND (£BN)					
_	2008	2009	% +/-	2008	2009	% +/-			
August 2009	8.6	7.6	-11%	4.9	3.9	-22%			
Jan – Aug '09	48.3	40.7	-16%	25.8	21.1	-19%			
Aug '08 – Aug '09	70.8	61.4	-13%	36.9	32.1	-13%			

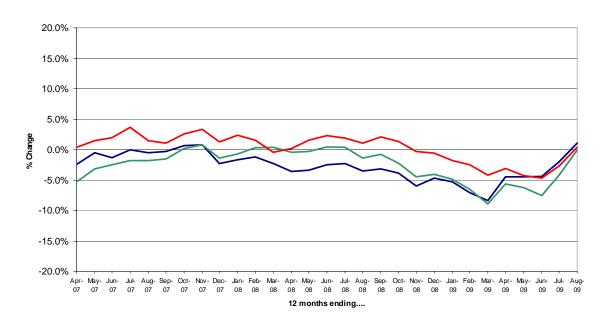
### TREND CHARTS

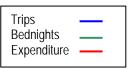


## UK All Trips - Domestic Trip Volume by Month



## **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 (August 2008 vs August 2009)
- Year to date (January August 2008 vs January August 09)
- 12 months (September 2007 August 2008 vs September 2008 August 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

Own home/friends'/relatives'

21.9% 16.2% 8.8%

LEGEND: Above Average Performance Performance Performance

NOTE: In the tables below, "average performance' refers to the total trips/rights/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 performace' 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 flavores have been greyed out' to indicate that they should be teated with control be treated with control be treated with control be treated with control be treated with control.

	fewer unweig	hted trips, the	% change fig	ures have been	greyed out to			treated with cau	tion.			
	м	onth: August 20	009	Unweighted	YTD:	January - Augu	Kingdor	11 Unweighted	2 month rolling	September 20	08 - August 2009	Unweighted
<u></u>	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	14.7%	15.4%	14.8%	2490	6.1%	5.3%	3.6%	13081	1.1%	-0.2%	0.4%	18142
PURPOSE:												
Pure Holiday	14.5%	15.7%	21.3%	1559	17.5%	16.2%	12.1%	6929	10.3%	9.3%	7.2%	9001
- 1-3 nights holiday	12.6%	12.7%	20.3%	729	17.8%	15.7%	6.7%	3967	10.6%	8.7%	5.0%	5318
- 4+ nights holiday	16.5%	16.6%	21.8%	830	16.9%	16.4%	17.2%	2962	9.7%	9.6%	9.5%	3683
VFR (on holiday)	21.5%	26.6%	24.2%	418	0.4%	2.1%	-3.2%	2370	0.7%	-1.4%	-2.6%	3595
HOLIDAY (TOTAL)	15.9%	17.5%	21.6%	1977	12.6%	12.8%	9.4%	9300	7.4%	6.3%	5.4%	12596
VFR (non-holiday)	21.3%	19.3%	-5.9%	312	-0.8%	-12.4%	-5.8%	2016	-8.9%	-14.3%	-12.2%	3057
VFR (TOTAL)	21.4%	24.1%	11.2%	730	-0.2%	-4.1%	-4.3%	4386	-4.0%	-7.0%	-6.9%	6652
Business	-1.6%	-13.5%	-16.6%	162	-8.1%	-4.5%	-8.5%	1471	-7.9%	-7.5%	-7.2%	2096
RDAs:												
Adv West Midlands	28.9%	-0.4%	10.4%	122	1.8%	-14.4%	-8.0%	794	-4.6%	-16.6%	-13.5%	1125
East of England	23.2%	28.7%	-3.0%	204	9.9%	5.8%	-7.1%	1120	-2.5%	-3.8%	-13.5%	1516
East Midlands	-14.0%	-30.1%	-7.2%	145	5.9%	-1.9%	-0.8%	813	-0.1%	-2.4%	-2.2%	1134
London	-1.9%	18.4%	-3.4%	134	-5.4%	-12.1%	-5.6%	1018	-3.6%	-8.2%	-8.7%	1499
North West	-2.2%	-5.8%	26.2%	233	5.2%	5.2%	9.0%	1309	4.7%	-0.3%	7.2%	1952
ONE North East	4.7%	4.0%	-9.5%	74	2.7%	0.0%	-5.6%	365	9.8%	2.9%	4.8%	560
South East England	32.8%	36.6%	39.6%	396	12.9%	15.6%	8.9%	1952	8.6%	8.2%	8.8%	2680
South West	20.6%	24.9%	26.8%	471	9.3%	10.7%	12.6%	2309	3.3%	4.5%	6.6%	3058
Yorkshire Forward	37.8%	16.5%	15.4%	216	13.3%	14.1%	13.7%	1137	4.1%	3.0%	6.5%	1529
LOCATION TYPE:												
Seaside	18.1%	13.4%	20.9%	772	20.6%	23.1%	18.5%	3297	12.2%	16.0%	11.7%	4254
Large city/ large town	19.6%	6.7%	-0.6%	736	3.3%	-6.1%	-5.4%	4632	-0.4%	-8.4%	-6.6%	6681
Small town	6.0%	7.4%	10.5%	531	-1.5%	-2.9%	-2.4%	2924	-4.0%	-5.8%	-3.3%	4218
Countryside/ village	17.6%	35.5%	33.3%	552	7.6%	9.2%	12.6%	2620	1.5%	1.1%	8.3%	3495
AGE:												
16-24	8.6%	22.8%	-8.5%	254	-0.5%	-12.5%	-6.5%	1445	-7.6%	-16.6%	-8.3%	2104
25-34	18.5%	-25.8%	4.8%	387	4.7%	-28.6%	5.4%	2064	0.6%	-26.1%	-0.7%	2824
35-44	6.3%	6.5%	11.2%	618	11.8%	14.0%	7.3%	3007	5.2%	7.3%	6.8%	4060
45-54	25.3%	33.7%	34.4%	484	6.6%	10.3%	4.0%	2279	1.3%	1.3%	-1.4%	3057
55+	17.5%	14.8%	21.1%	747	4.6%	2.9%	3.1%	4287	2.2%	0.8%	0.6%	6097
SEG:												
AB	2.6%	7.3%	-0.2%	741	4.1%	7.5%	-0.9%	4190	1.3%	2.5%	-1.7%	5761
C1	26.8%	30.7%	29.5%	821	5.3%	7.2%	10.5%	4107	-0.2%	-0.3%	2.1%	5609
C2	12.7%	2.7%	11.7%	437	8.4%	-1.6%	1.7%	2315	2.8%	-3.0%	3.5%	3256
DE	20.8%	19.5%	30.6%	492	9.7%	4.5%	3.9%	2468	1.6%	-2.2%	-1.2%	3516
CHILDREN IN H/H:												
Any	9.4%	15.7%	9.3%	1033	9.7%	12.8%	4.4%	4678	4.1%	6.0%	0.6%	6319
None	18.3%	15.2%	18.3%	1457	4.3%	1.6%	3.3%	8404	-0.2%	-2.9%	0.3%	11823
ACCOMMODATION:												
Commercial accom	13.1%	15.4%	17.0%	1549	9.9%	10.3%	5.8%	7729	5.2%	4.6%	3.2%	10281
- Serviced accom	21.5%	20.3%	23.8%	790	5.5%	3.7%	-0.3%	4791	3.4%	2.6%	-0.3%	6750
- Hotel/motel/guesthouse	24.3%	22.9%	24.8%	660	5.3%	3.1%	-1.5%	4185	3.8%	2.7%	-1.0%	5930
- Bed & Breakfast	5.7%	10.3%	18.4%	135	3.7%	6.8%	9.1%	628	-0.8%	2.1%	5.9%	852
Total self-catering rented	10.8%	14.5%	13.1%	730	22.7%	20.9%	20.7%	2713	11.7%	11.1%	13.3%	3195
-Camping & Caravanning	3.2%	5.0%	-2.1%	596	18.8%	16.0%	12.4%	2195	13.6%	12.4%	9.2%	2566
(inc. owned caravans)				250				988				1223
-Other self-catering rented	26.0%	24.8%	26.9%		24.1%	22.5%	24.1%		8.2%	8.2%	13.1%	228
Hostels	-30.0%	-13.8%	-32.6%	25	-11.3%	-21.5%	1.0%	163	-3.3%	-14.6%	-0.7%	
Own home/friends'/relatives'	18.2%	15.2%	6.7%	942	1.4%	-1.0%	-3.7%	5217	-3.7%	-5.4%	-8.6%	7646

		onth: August 20	100	Unweighted	VTD.	Eng January - Augu	gland	Unweighted	2 month cellin	g September 20	08 August 2001	Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	14.8%	14.9%	16.8%	1932	6.8%	5.5%	4.6%	10607	2.1%	0.3%	1.1%	14788
PURPOSE:												
Pure Holiday	14.9%	17.4%	23.8%	1167	18.6%	19.8%	13.2%	5374	11.1%	11.8%	7.2%	6987
- 1-3 nights holiday	13.6%	13.5%	16.8%	564	17.9%	15.8%	4.1%	3110	10.8%	9.3%	3.6%	4173
- 4+ nights holiday	16.1%	18.6%	28.3%	601	19.8%	21.6%	22.5%	2259	11.6%	13.2%	11.0%	2808
VFR (on holiday)	26.2%	21.9%	24.6%	341	3.4%	-0.1%	0.9%	2012	3.4%	-3.2%	-1.0%	3036
HOLIDAY (TOTAL)	17.2%	18.1%	23.9%	1507	14.1%	14.6%	11.0%	7384	8.7%	7.4%	5.6%	10024
VFR (non-holiday)	23.1%	18.5%	-7.9%	274	0.7%	-11.9%	-4.9%	1744	-6.5%	-11.9%	-7.4%	2687
VFR (TOTAL)	24.8%	20.6%	9.5%	616	2.1%	-5.3%	-1.6%	3757	-1.5%	-7.1%	-4.0%	5724
Business	-8.0%	-17.9%	-15.5%	125	-8.7%	-6.9%	-8.5%	1228	-8.2%	-8.5%	-6.8%	1739
RDAs:												
Adv West Midlands	28.9%	-0.4%	10.4%	122	1.8%	-14.4%	-8.0%	794	-4.6%	-16.6%	-13.5%	1125
East of England	23.2%	28.7%	-3.0%	204	9.9%	5.8%	-7.1%	1120	-2.5%	-3.8%	-13.5%	1516
East Midlands	-14.0%	-30.1%	-7.2%	145	5.9%	-1.9%	-0.8%	813	-0.1%	-2.4%	-2.2%	1134
London	-1.9%	18.4%	-3.4%	134	-5.4%	-12.1%	-5.6%	1018	-3.6%	-8.2%	-8.7%	1499
North West	-2.2%	-5.8%	26.2%	233	5.2%	5.2%	9.0%	1309	4.7%	-0.3%	7.2%	1952
ONE North East	4.7%	4.0%	-9.5%	74	2.7%	0.0%	-5.6%	365	9.8%	2.9%	4.8%	560
South East England	32.8%	36.6%	39.6%	396	12.9%	15.6%	8.9%	1952	8.6%	8.2%	8.8%	2680
South West	20.6%	24.9%	26.8%	471	9.3%	10.7%	12.6%	2309	3.3%	4.5%	6.6%	3058
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LOCATION TYPE:												
Seaside	17.6%	17.3%	17.4%	596	23.0%	27.1%	20.1%	2590	14.2%	19.6%	13.4%	3361
Large city/ large town	18.2%	3.4%	1.0%	599	3.4%	-6.7%	-5.3%	3909	0.7%	-8.9%	-6.0%	5658
Small town	11.0%	11.3%	16.7%	394	-0.1%	-2.5%	0.2%	2333	-1.9%	-4.9%	-2.2%	3390
Countryside/ village	17.4%	25.7%	43.0%	411	8.6%	7.4%	13.7%	2071	1.4%	-0.4%	8.0%	2773
AGE:												
16-24	-3.5%	2.7%	-9.7%	196	-3.5%	-18.5%	-9.4%	1174	-8.1%	-20.4%	-9.3%	1743
25-34	32.2%	21.9%	10.5%	318	9.2%	13.5%	6.7%	1698	5.2%	6.4%	1.9%	2333
35-44	3.3%	4.9%	14.6%	466	12.8%	13.1%	11.8%	2419	5.9%	6.7%	9.7%	3272
45-54	22.3%	25.8%	28.8%	360	5.4%	6.5%	3.1%	1793	0.7%	-2.3%	-2.1%	2428
55+	22.3%	20.4%	27.2%	595	6.0%	6.1%	4.2%	3534	3.3%	3.4%	0.4%	5021
SEG:												
AB	1.3%	6.9%	3.4%	572	5.1%	6.5%	0.8%	3440	2.2%	1.7%	-1.1%	4761
C1	27.2%	31.6%	31.1%	651	3.9%	7.7%	7.7%	3340	0.7%	1.2%	2.0%	4602
C2	8.5%	-2.4%	5.8%	333	11.2%	-0.2%	5.5%	1856	4.1%	-3.7%	4.0%	2614
DE	29.5%	21.8%	39.0%	374	12.7%	5.5%	7.7%	1955	3.0%	-0.2%	2.1%	2781
CHILDREN IN H/H:					121111	0.0.0	,					
Any	13.0%	21.5%	16.6%	799	12.3%	13.2%	9.1%	3775	7.0%	6.5%	4.1%	5152
None	15.9%	9.8%	16.9%	1133	4.2%	1.9%	2.8%	6831	0.0%	-2.4%	0.0%	9637
ACCOMMODATION:	10.070	0.070	10.070		4.270	1.070	2.070		0.070	2.470	0.070	
Commercial accom	12.3%	15.6%	19.1%	1188	10.8%	12.4%	6.5%	6179	5.8%	5.4%	3.0%	8219
- Serviced accom	19.4%	18.8%	23.1%	624	6.1%	5.0%	-0.6%	3901	4.0%	3.4%	-0.9%	5489
				533								5489 4850
- Hotel/motel/guesthouse	27.6%	30.5%	29.4%		6.3%	4.7%	-1.8%	3433	4.9%	4.0%	-1.6%	
- Bed & Breakfast	-12.4%	-19.7%	-7.5%	96	1.9%	6.9%	9.5%	485	-3.0%	0.1%	5.1%	666
Total self-catering rented	13.3%	18.4%	19.4%	551	27.0%	27.1%	25.3%	2110	13.4%	14.4%	15.0%	2476
-Camping & Caravanning (inc. owned caravans)	8.2%	10.2%	-5.9%	446	25.6%	25.3%	3.3%	1669	17.9%	20.1%	3.0%	1935
-Other self-catering rented	19.0%	27.5%	50.6%	173	24.1%	27.1%	26.6%	753	6.9%	9.7%	12.2%	934
Hostels	-55.9%	-51.9%	-51.7%	10	-31.5%	-38.8%	-6.3%	100	-11.2%	-25.0%	3.8%	146

2.6% -1.9% -2.6%

-1.9% -4.8% -6.1%