

## 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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
<b>August '09</b>									
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%
<b>Jan – Aug'09</b>									
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)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
<b>UK</b>									
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%
<b>England</b>									
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)

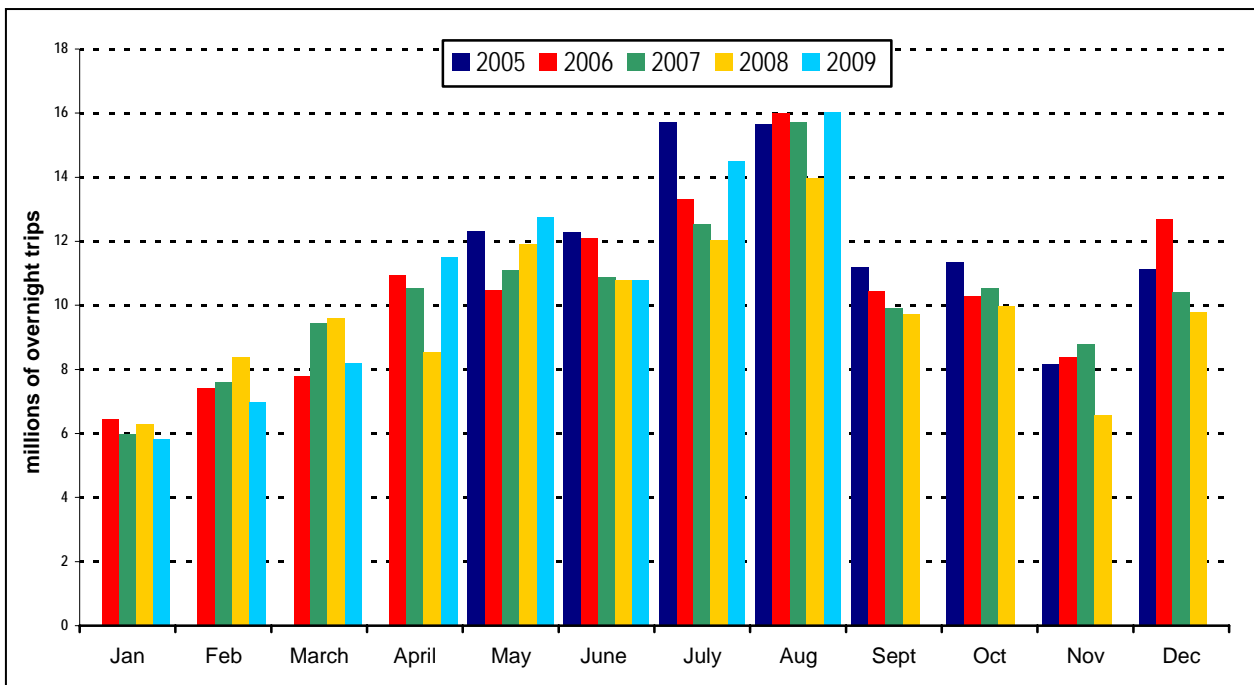
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
<b>UK</b>									
Holiday	37.9	44.5	17%	148.4	172.5	16%	8,342	9,354	12%
Business	12.8	11.7	-8%	30.3	29.0	-4%	3,164	2,896	-8%
VFR	28.3	28.3	0%	83.5	80.1	-4%	3,124	2,989	-4%
<b>England</b>									
Holiday	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

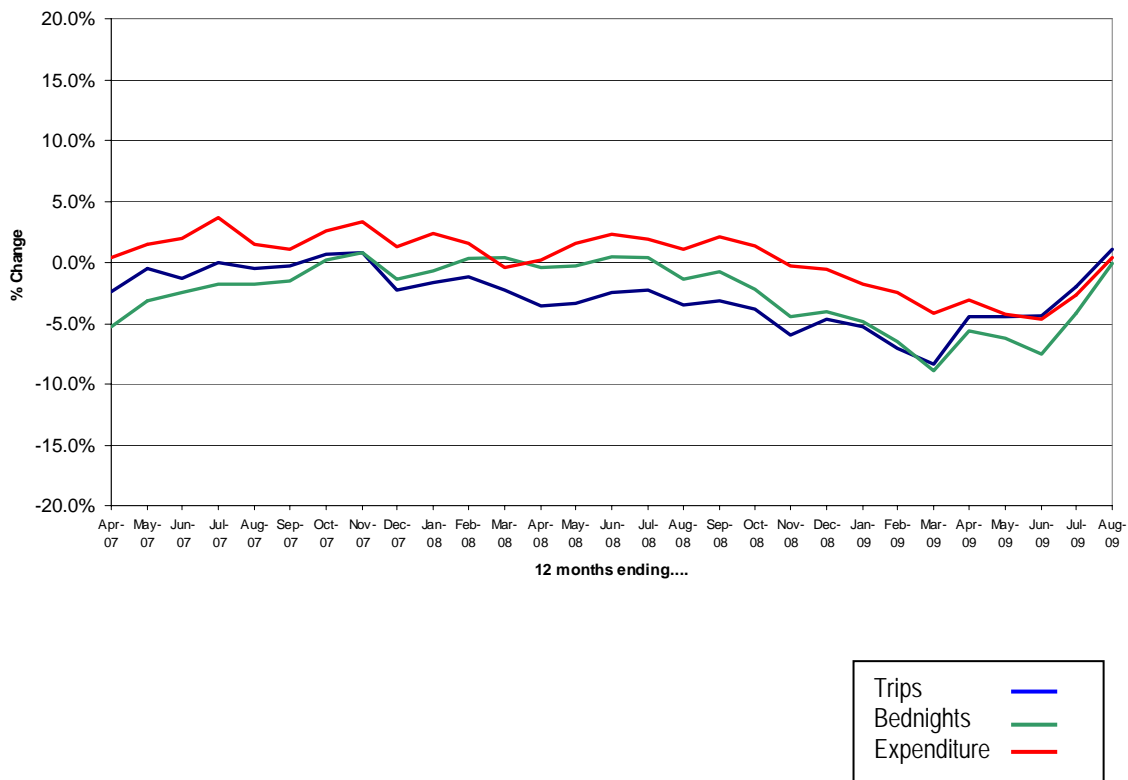
	TRIPS (MILLIONS)			SPEND (£BN)		
	2008	2009	% +/-	2008	2009	% +/-
<b>August 2009</b>	8.6	7.6	-11%	4.9	3.9	-22%
<b>Jan – Aug '09</b>	48.3	40.7	-16%	25.8	21.1	-19%
<b>Aug '08 – Aug '09</b>	70.8	61.4	-13%	36.9	32.1	-13%

## 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.

