

## UK TOURISM SURVEY – AUGUST 2010 SUMMARY OF RESULTS

### 1. Headlines

- The number of domestic overnight tourism trips made in the UK in the month of August fell by 10% compared with August 2009.
- At the same time, the total number of bednights and spend also fell (by -12% and -11% respectively).
- In England, the number of trips taken decreased by 6% while bednights (-5%) and expenditure (-7%) were also down on 2009 levels.
- Between January and August, the volume of overnight trips taken in the UK was 3% lower than in the first eight months of 2009, with 6% fewer bednights and a 7% decrease in spend.
- Within England, trip volumes fell by 4% with both 7% fewer bednights and a 7% reduction in expenditure compared to January-August 2009.
- In the past 12 months 123.174 million overnight trips were taken in the UK, half a million more than in the 12 months between September 2008 and August 2009.

### 2. Trip Characteristics

- Between January and August the total number of “pure” holiday trips taken in the UK has fallen by 6% and this decline is reflected in the 6% overall reduction in “pure” holiday spending.
- There are variations by trip length with the volume of shorter 1-3 night “pure” holiday trips (-4%) less affected than longer holiday trips (-8%). Similarly, spend on 4+ night holidays has decreased (-10%), more significantly than spending on 1-3 night holidays (-1%).
- Over the same period, the volume of business trips declined by 6% and, a result of a much shorter average trip length, there was a 13% reduction in expenditure.
- During the first eight months of the year, the volume of visits to friends and family remained at 2009 levels and spending dropped slightly (by -3%).
- Trips taken by the least affluent DE social grade have continued to decline, resulting in an 11% decrease in the number of trips taken by this group between January and August. At the same time, trips taken by the more affluent ABs rose slightly (+1%).

### 3. Longer-Term Trends

- 2009 was an exceptional year for domestic holiday tourism, and so it is helpful to understand longer-term trends when reviewing 2010 results. To enable these comparisons to be made, the third page of this document includes a comparison of August results for the past four years.
- This shows very different trends by trip purpose. The number of holiday trips taken in August 2009 was 18% higher than in 2008, and so although lower than last year, domestic holiday trip volumes and values remain at historically high levels.
- Business trips in contrast declined between 2008 and 2009, and have fallen back further over 2010, with the eight month volume and value totals at their lowest level since the current survey began.

### 4. Overseas Travel by UK Residents

- Travel abroad by British residents has continued to decline in 2010, with 7% fewer trips taken between January and August this year and a 3% reduction in spending.

**UK TOURISM SURVEY - AUGUST 2010**  
**SUMMARY OF RESULTS**  
**KEY MEASURES 2009-2010**

**Year on Year Comparison – All Trips**

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
<b>August '10</b>									
UK	16.0	14.4	-10%	64.9	57.1	-12%	3,042	2,703	-11%
England	12.4	11.8	-6%	46.9	44.4	-5%	2,274	2,117	-7%
<b>Jan – August'10</b>									
UK	86.6	83.3	-3%	287.48	268.97	-6%	15,521	14,506	-6%
England	70.2	67.4	-4%	222.72	206.43	-6%	12,148	11,266	-7%

**Purpose of Trip – August 2010**

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
<b>UK</b>									
Holiday	9.9	9.0	-9%	45.6	39.7	-13%	2,283	1,986	-13%
Business	1.3	1.0	-20%	3.2	2.7	-15%	252	223	-12%
VFR	4.6	4.1	-11%	15.2	13.9	-9%	477	457	-4%
<b>England</b>									
Holiday	7.4	7.1	-4%	33.0	30.4	-8%	1,709	1,551	-9%
Business	1.0	0.8	-15%	2.2	2.3	3%	185	175	-5%
VFR	3.9	3.5	-10%	11.2	11.0	-1%	357	355	-1%

**Purpose of Trip – Year to Date (January – August 2010)**

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
<b>UK</b>									
Holiday	44.5	42.1	-6%	172.5	157.5	-9%	9,354	8,817	-6%
Business	11.7	11.0	-6%	29.0	25.4	-12%	2,896	2,527	-13%
VFR	28.3	28.4	0%	80.1	79.7	-1%	2,989	2,854	-5%
<b>England</b>									
Holiday	34.5	32.4	-6%	130.1	118.0	-9%	7,166	6,716	-6%
Business	9.8	8.9	-9%	23.2	18.9	-19%	2,324	1,988	-14%
VFR	24.2	24.1	0%	64.9	64.8	0%	2,422	2,303	-5%

**Outbound Travel – UK Residents**

	TRIPS (MILLIONS)			SPEND (£BN)		
	2009	2010	% +/-	2009	2010	% +/-
August 2010	7.5	7.5	-1%	4.1	4.3	5%
Jan – Aug '10	40.6	37.9	-7%	22.2	21.6	-3%
Sept '09 – Aug '10	61.3	55.8	-9%	33.2	31.1	-6%

**UK TOURISM SURVEY**  
**SUMMARY OF RESULTS 2007-2010**

**Year-on-Year Comparison – All Trips**

	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
<b>August '10</b>												
UK	15.7	14.0	16.0	14.4	63.9	56.2	64.9	57.1	2,926	2,650	3,042	2,703
England	12.7	10.8	12.4	11.8	50.4	40.8	46.9	44.5	2,274	1,947	2,274	2,117
<b>Jan – August'10</b>												
UK	83.8	81.6	86.6	83.8	277.5	273.1	287.5	269.0	14,673	14,981	15,521	14,506
England	68.1	65.7	70.2	67.4	215.9	211.1	222.7	206.4	11,380	11,614	12,148	11,266

**Purpose of Trip – August 2010**

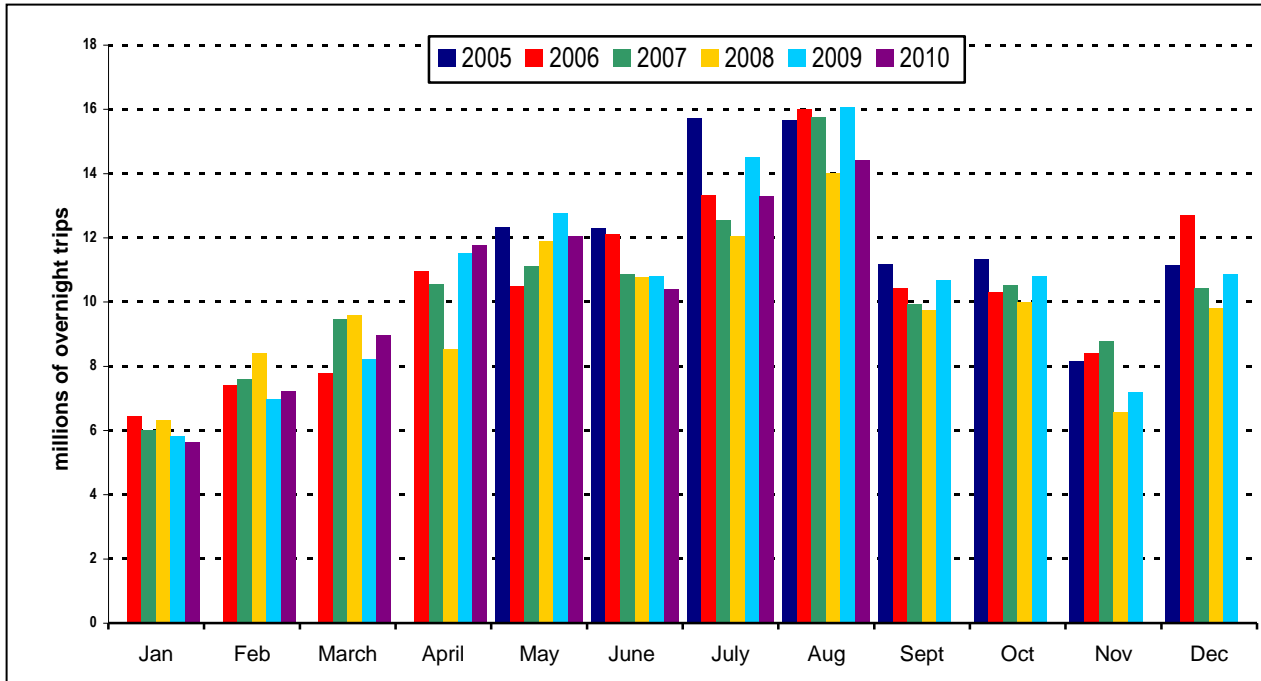
	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
<b>UK</b>												
Holiday	8.8	8.7	9.9	9.0	41.7	39.4	45.6	39.7	1,944	1,882	2,283	1,986
Business	1.7	1.3	1.3	1.0	5.3	3.7	3.2	2.7	413	302	252	223
VFR	4.9	3.8	4.6	4.1	15.9	12.3	15.2	13.9	536	429	477	457
<b>England</b>												
Holiday	6.9	6.5	7.4	7.1	32.4	28.1	33.0	30.4	1,548	1,380	1,709	1,551
Business	1.3	1.1	1.0	0.8	3.8	2.7	2.2	2.3	275	219	185	175
VFR	4.3	3.1	3.9	3.5	13.2	9.3	11.2	11.0	427	326	357	355

**Purpose of Trip – Year to Date (January – August 2010)**

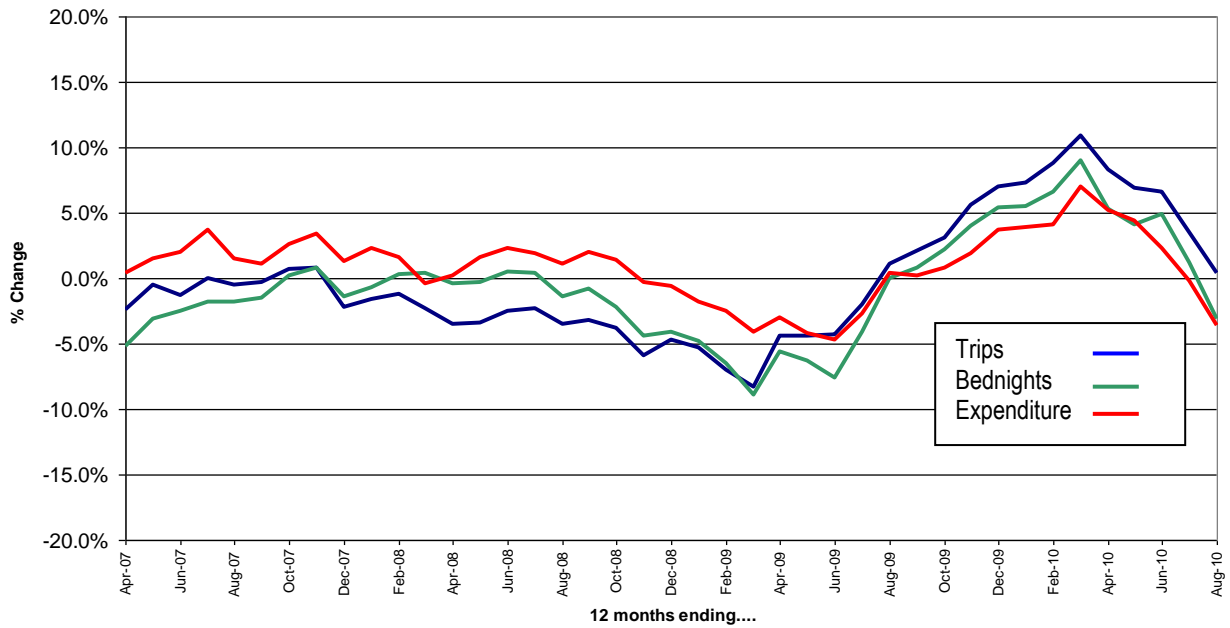
	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
<b>UK</b>												
Holiday	38.5	37.9	44.5	42.1	153.5	148.4	172.5	157.5	8,243	8,342	9,354	8,817
Business	12.9	12.8	11.7	11.0	30.4	30.3	29.0	25.4	3,073	3,164	2,896	2,527
VFR	30.3	28.3	28.3	28.4	86.2	83.5	80.1	79.7	3,023	3,124	2,989	2,854
<b>England</b>												
Holiday	29.8	29.1	34.5	32.4	114.3	108.6	130.1	118.0	6,252	6,331	7,166	6,716
Business	10.7	10.7	9.8	8.9	24.5	24.9	23.2	18.9	2,416	2,541	2,324	1,988
VFR	25.8	23.7	24.2	24.1	71.4	68.5	64.9	64.8	2,459	2,462	2,422	2,303

## 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 2009 vs August 2010)
- Year to date (January – August 2009 vs January – August 2010)
- 12 months (September 2008 – August 2009 vs September 2009 – August 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** **Comparisons with equivalent periods, 2009**

<b>LEGEND:</b>	Above Average Performance	Average Performance	Below Average Performance
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**NOTE:** In the tables below, 'average performance' refers to the total trips/highs/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												England												
	Month: August 2010			Unweighted Trips	YTD: January - August 2010			Unweighted Trips	month rolling September 2009 - August 2010			Unweighted Trips	Month: August 2010			Unweighted Trips	YTD: January - August 2010			Unweighted Trips	month rolling September 2009 - August 2010			Unweighted Trips	
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips
<b>TOTAL</b>	-10.2%	-12.1%	-11.1%	2221	-3.3%	-6.4%	-6.5%	12608	0.4%	-2.9%	-3.6%	18087	-5.6%	-5.2%	-6.9%	10149	-4.0%	-7.3%	-7.3%	10149	0.2%	-3.0%	-3.3%	14708	
<b>PURPOSE:</b>																									
Pure Holiday	-9.3%	-12.8%	-13.0%	1412	-5.5%	-8.7%	-5.7%	6504	-0.6%	-4.5%	-2.6%	8859	-4.1%	-8.0%	-9.2%	5006	-6.2%	-9.3%	-6.3%	5006	-0.7%	-4.1%	-2.1%	6872	
- 1-3 nights holiday	-9.5%	-11.1%	-14.3%	656	-4.2%	-6.8%	-0.6%	3786	1.3%	1.2%	0.5%	5355	-5.1%	-6.8%	-9.3%	2952	-4.7%	-17.9%	-1.0%	2952	1.3%	2.2%	0.8%	4200	
- 4+ nights holiday	-9.0%	-13.3%	-12.3%	756	-7.5%	-11.9%	-10.1%	2718	-3.9%	-7.2%	-5.6%	3504	-3.0%	-8.3%	-9.2%	2050	-8.5%	-22.6%	-10.9%	2050	-4.1%	-7.2%	-5.0%	2666	
VFR (on holiday)	-14.8%	-12.1%	-14.9%	349	0.4%	-2.9%	-2.7%	2343	0.9%	-0.8%	-4.4%	3600	-15.4%	-4.2%	-10.6%	1935	-2.3%	-2.3%	-5.6%	1935	-0.5%	1.0%	-3.9%	2999	
<b>HOLIDAY (TOTAL)</b>	-10.4%	-12.7%	-13.2%	1761	-4.0%	-7.4%	-5.3%	8847	-0.2%	-3.5%	-2.9%	12459	-6.6%	-7.3%	-9.4%	6941	-5.1%	-7.7%	-6.2%	6941	-0.7%	-2.7%	-2.4%	9871	
VFR (non-holiday)	-5.8%	-2.1%	14.4%	287	0.1%	3.1%	-7.0%	2048	1.3%	3.0%	-6.1%	3093	-2.6%	3.3%	15.1%	1802	1.8%	2.7%	-3.9%	1802	1.9%	1.7%	-6.7%	2733	
<b>VFR (TOTAL)</b>	-10.9%	-8.8%	-4.2%	636	0.3%	-0.5%	-4.5%	4391	1.1%	0.7%	-5.2%	6693	-9.6%	-1.3%	-0.6%	3738	-0.3%	-0.3%	-4.9%	3738	0.6%	1.3%	-5.1%	5734	
Business	-19.6%	-15.2%	-11.5%	128	-5.9%	-12.3%	-12.7%	1382	0.6%	-7.0%	-5.9%	2077	-14.6%	3.0%	-5.4%	1118	-8.8%	-18.6%	-14.5%	1118	-0.5%	-11.5%	-5.8%	1705	
<b>RDAs:</b>																									
Adv West Midlands	2.3%	20.1%	13.2%	127	-1.9%	6.5%	-3.4%	794	6.1%	12.9%	9.9%	1179	2.3%	20.1%	13.2%	794	-1.9%	6.5%	-3.4%	794	6.1%	12.9%	9.9%	1179	
East of England	-30.1%	-37.8%	-28.8%	143	-12.1%	-12.9%	1.9%	967	-1.4%	-7.5%	10.4%	1435	-30.1%	-37.8%	-28.8%	967	-12.1%	-12.9%	1.9%	967	-1.4%	-7.5%	10.4%	1435	
East Midlands	20.9%	35.5%	26.2%	170	3.3%	6.2%	1.5%	848	4.8%	5.7%	0.8%	1174	20.9%	35.5%	26.2%	848	3.3%	6.2%	1.5%	848	4.8%	5.7%	0.8%	1174	
London	28.3%	3.7%	9.8%	166	6.8%	2.8%	2.5%	1080	3.6%	-1.8%	0.4%	1554	28.3%	3.7%	9.8%	1080	6.8%	2.8%	2.5%	1080	3.6%	-1.8%	0.4%	1554	
North West	-15.0%	-13.5%	-14.5%	193	-5.9%	-9.8%	-8.3%	1260	-1.6%	-6.0%	-7.8%	1925	-15.0%	-13.5%	-14.5%	1260	-5.9%	-9.8%	-8.3%	1260	-1.6%	-6.0%	-7.8%	1925	
ONE North East	-13.7%	-10.1%	-16.3%	59	-8.2%	-13.9%	3.2%	350	-12.6%	-13.3%	-9.1%	526	-23.7%	-30.2%	-16.3%	350	-8.2%	-13.9%	3.2%	350	-12.6%	-13.3%	-9.1%	526	
South East England	-20.3%	-17.5%	-17.1%	291	-7.3%	-11.7%	-10.6%	1747	-2.1%	-5.7%	-3.4%	2550	-20.3%	-17.5%	-17.1%	1747	-7.3%	-11.7%	-10.6%	1747	-2.1%	-5.7%	-3.4%	2550	
South West	0.0%	-0.1%	-5.0%	475	-6.9%	-9.0%	-15.0%	2154	-1.1%	-2.2%	-8.3%	3045	0.0%	-0.1%	-5.0%	2154	-6.9%	-9.0%	-15.0%	2154	-1.1%	-2.2%	-8.3%	3045	
Yorkshire Forward	-0.7%	15.7%	-7.1%	209	-3.7%	-10.6%	-12.2%	1102	-0.9%	-6.7%	-8.9%	1543	-0.7%	15.7%	-7.1%	1102	-3.7%	-10.6%	-12.2%	1102	-0.9%	-6.7%	-8.9%	1543	
<b>LOCATION TYPE:</b>																									
Seaside	-15.6%	-13.6%	-17.5%	640	-10.8%	-13.7%	-14.5%	2943	-6.2%	-10.2%	-11.0%	3952	-15.1%	-15.2%	-16.0%	2286	-11.8%	-15.8%	-14.2%	2286	-6.7%	-11.5%	-10.1%	3107	
Large city/ large town	-0.1%	7.6%	2.5%	738	-2.9%	-1.9%	-3.0%	4514	1.1%	0.4%	-2.2%	6766	5.9%	22.9%	7.2%	3848	-1.9%	-0.9%	-1.1%	3848	1.8%	1.5%	0.3%	5770	
Small town	-14.4%	-24.3%	-16.9%	456	1.9%	-1.0%	0.4%	2972	2.2%	-0.1%	3.5%	4278	-9.3%	-18.1%	-11.6%	2320	-3.3%	-3.9%	-5.7%	2320	1.2%	-1.3%	0.5%	3406	
Countryside/ village	-16.9%	-16.8%	-15.0%	450	-5.5%	-7.8%	-10.1%	2430	0.6%	-0.9%	-5.1%	3452	-9.0%	-4.5%	-8.4%	1882	-7.4%	-6.8%	-12.6%	1882	-0.6%	0.1%	-7.3%	2705	
<b>AGE:</b>																									
16-24	1.2%	-4.9%	13.7%	258	2.5%	7.4%	-4.1%	1483	-3.1%	-0.7%	-10.2%	2046	11.8%	8.3%	17.2%	1246	6.0%	11.1%	-4.4%	1246	-1.6%	2.8%	-10.5%	1720	
25-34	-17.7%	-36.1%	-24.2%	321	-6.2%	-27.8%	-17.5%	1994	2.8%	-26.4%	-9.5%	2896	-18.2%	-26.4%	-25.8%	1629	-6.8%	-19.3%	-17.8%	1629	2.2%	-8.9%	-9.6%	2379	
35-44	-10.1%	-11.2%	-16.4%	572	-5.9%	-8.0%	-5.6%	2873	-2.3%	-6.5%	-4.8%	3985	-3.3%	0.1%	-10.5%	2258	-8.0%	-9.7%	-7.4%	2258	-3.3%	-7.0%	-4.7%	3179	
45-54	-13.7%	-12.6%	-13.5%	407	-0.2%	-4.2%	-5.2%	2225	3.8%	1.7%	-1.0%	3167	-8.6%	1.0%	-6.6%	1727	-1.6%	-2.3%	-5.5%	1727	2.9%	3.8%	-0.5%	2484	
55+	-7.4%	-9.6%	-5.1%	663	-3.6%	-6.3%	-2.6%	4033	0.9%	-1.9%	1.2%	5993	-4.3%	-6.8%	-0.8%	3297	-4.4%	-8.0%	-3.0%	3297	1.1%	-2.7%	2.1%	4949	
<b>SEG:</b>																									
AB	-3.5%	-4.4%	-3.8%	619	0.7%	-4.0%	-3.6%	4024	2.8%	-3.4%	-2.8%	5817	3.1%	5.6%	1.3%	3272	-0.3%	-3.8%	-1.9%	3272	1.9%	-3.7%	-0.7%	4769	
C1	-21.4%	-25.5%	-20.0%	662	-6.8%	-11.8%	-12.2%	3839	-1.1%	-5.2%	-5.3%	5515	-19.1%	-19.5%	-15.1%	3127	-6.7%	-12.3%	-13.4%	3127	-1.7%	-5.7%	-6.1%	4498	
C2	6.1%	0.5%	2.7%	481	2.5%	4.4%	8.1%	2307	2.0%	3.3%	2.1%	3218	14.6%	7.8%	6.8%	1801	-0.2%	-0.7%	1.9%	1801	2.2%	3.2%	0.2%	2590	
DE	-16.8%	-12.4%	-23.7%	460	-11.1%	-12.0%	-18.4%	2439	-3.4%	-4.0%	-9.0%	3537	-14.2%	-8.3%	-22.5%	1934	-11.0%	-11.7%	-18.7%	1934	-2.2%	-3.1%	-8.8%	2835	
<b>CHILDREN IN H/H:</b>																									
Any	-4.6%	-11.6%	-10.7%	997	1.1%	-4.2%	-1.6%	4801	3.2%	-2.4%	-1.3%	6581	-1.7%	-7.6%	-10.0%	3825	-0.2%	-5.4%	-4.2%	3825	2.0%	-3.2%	-1.9%	5302	
None	-13.7%	-12.5%	-11.4%	1225	-5.4%	-7.7%	-8.6%	7808	-0.8%	-3.2%	-4.5%	11506	-8.1%	-3.1%	-5.1%	6319	-5.8%	-8.3%	-8.5%	6319	-0.6%	-3.0%	-3.9%	9398	
<b>ACCOMMODATION:</b>																									
Commercial accom	-9.4%	-13.7%	-11.4%	1393	-2.6%	-6.2%	-5.6%	7502	1.1%	-3.0%	-2.8%	10318	-2.9%	-6.8%	-7.3%	5969	-3.1%	-8.2%	-6.6%	5969	1.4%	-3.5%	-2.7%	8293	
- Serviced accom	-8.7%	-10.2%	-12.7%	717	-0.3%	-2.3%	-5.4%	4758	1.7%	-1.2%	-3.5%	6816	-1.2%	-0.7%	-7.0%	3861	-0.8%	-4.4%	-6.3%	3861	2.0%	-1.8%	-3.2%	5568	
- Hotel/ motel/guesthouse	-7.2%	-11.1%	-12.5%	608	0.2%	-1.7%	-4.8%	4179	2.5%	-0.6%	-3.1%	6034	-1.3%	-5.3%	-9.0%	3394	-0.9%	-5.1%	-6.0%	3394	2.5%	-2.0%	-2.7%	4946	
- Bed & Breakfast	-18.6%	-6.3%	-13.9%	109	-5.2%	-5.6%	-9.6%	593	-4.2%	-4.8%	-6.5%	810	-4.9%	23.7%	6.5%	475	-1.9%	-0.3%	-8.4%	475	-3.6%	-0.4%	-7.4%	639	
Total self-catering rented	-9.2%	-13.8%	-10.1%	658	-5.2%	-7.3%	-4.0%	2563	1.8%	-1.9%	0.7%	3229	-4.7%	-10.3%	-9.1%	1971	-1.8%	-10.1%	-6.1%	1971	1.8%	-3.1%	-0.1%	2506	
- Camping & Caravanning	-5.7%	-9.0%	-5.4%	558	-7.1%	-8.2%	-8.1%	2033	-1.5%	-4.7%	-2.5%	2509	-5.8%	-10.5%	-5.8%	1488	-10.6%	-13.4%	-10.4%	1488	-3.5%	-8.1%	-0.4%	1856	
- Other self-catering rented	-17.3%	-18.2%	-14.5%	205	-4.9%	-8.7%	-3.2%	936	3.0%	-1.9%	1.8%	1250	-6.6%	-11.2%	-14.5%	711	-5.3%	-11.9%	-1.8%	711	3.3%	-3.7%	3.8%	960	
Hostels	-14.7%	-34.8%	-22.6%	21	-3.5%	-10.3%	-12.4%	157	-5.1%	-12.7%	-12.1%	215	49.2%	56.1%	42.9%	116	17.1%	16.3%	7.5%	116	13.3%	11.3%	3.1%	164	
Own home/ friends/relatives'	-14.3%	-10.3%	-13.9%	802	-5.1%	-6.8%	-10.1%	4931	-1.0%	-3.4%	-5.8%	7515	-13.9%	-5.9%	-12.0%	4033	-6.0%	-6.3%	-10.1%	4033	-2.0%	-3.0%	-5.4%	6196	