

UK TOURISM SURVEY - December 2009 SUMMARY OF RESULTS

1. Headlines

- In 2009, the number of UK domestic overnight trips grew by 7% and spend rose by 4%.
- Within England, trip numbers were up by 8% while expenditure rose by 5%.
- Bednights also rose during 2009 (+5% in the UK and +6% in England) compared to 2008.
- In December, domestic tourism trips in the UK grew by 11% compared to December 2008.
- During the month, the number of bednights rose by 7% and total expenditure grew by 10%.
- In England, trips were up by 11% during December while nights and spend also rose (+12% and +10% respectively).

2. Trip Characteristics

- In 2009 the number of trips grew by (+7%) overall. However, this increase has been driven by strong growth in "pure holiday" trips during the year (up by +17% in the UK and +18% in England). Within the month of December "pure holiday" trips continued to increase (7%).
- The increase in pure holiday trips has come from both longer and shorter breaks, with 1-3 and 4+ night holidays up by 18% and 16% respectively during the year.
- In 2009 business trips were down slightly compared with 2008 (-1% in the UK and England). However, in the last few months of 2009 business trips have started to stabilise, and rose from 1.1m to 1.4m in the month of December.
- The number of visits to friends and family in 2009 increased only marginally (by 1% in the UK and 2%) in England. However, specifically in the month of December, VFR trips rose by 9% in the UK and 11% in England.
- As a result of the growth in domestic holiday trips during 2009, the self-catering sector experienced a 26% increase in trips, while serviced accommodation grew by a comparatively small 6%, perhaps reflecting the decline in business travel at the beginning of 2009.

3. Overseas Travel by UK Residents

- In 2009, UK residents made 15% fewer trips abroad than in 2008, while spend was down by 13%. In the month of December 2009, UK residents' trips abroad fell by 16% compared with 2008 and they spent 11% less.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 35% for the month of December (2% higher than in December '08).
- The England Attractions Monitor showed that in the month of December visits to visitor attractions fell slightly by -1% compared with December '08.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
December '09									
UK	9.8	10.9	11%	29.7	31.6	7%	£1,377	£1,519	10%
England	8.2	9.1	11%	23.4	26.3	12%	£1,088	£1,266	16%
Jan – Dec'09									
UK	117.7	126.0	7%	378.4	398.7	5%	£21,107	£21,881	4%
England	95.5	102.9	8%	295.4	312.9	6%	£16,433	£17,281	5%

Purpose of Trip – December 2009

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	2.7	2.9	7%	7.9	8.2	3%	£576	£631	10%
Business	1.1	1.4	33%	2.1	2.6	23%	£250	£321	28%
VFR	5.8	6.3	9%	19.3	20.5	6%	£528	£539	2%
England									
Holiday	2.2	2.3	7%	5.9	6.7	12%	£435	£524	20%
Business	1.0	1.2	25%	1.8	1.9	7%	£230	£269	17%
VFR	4.9	5.5	11%	15.4	17.4	13%	£405	£451	11%

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

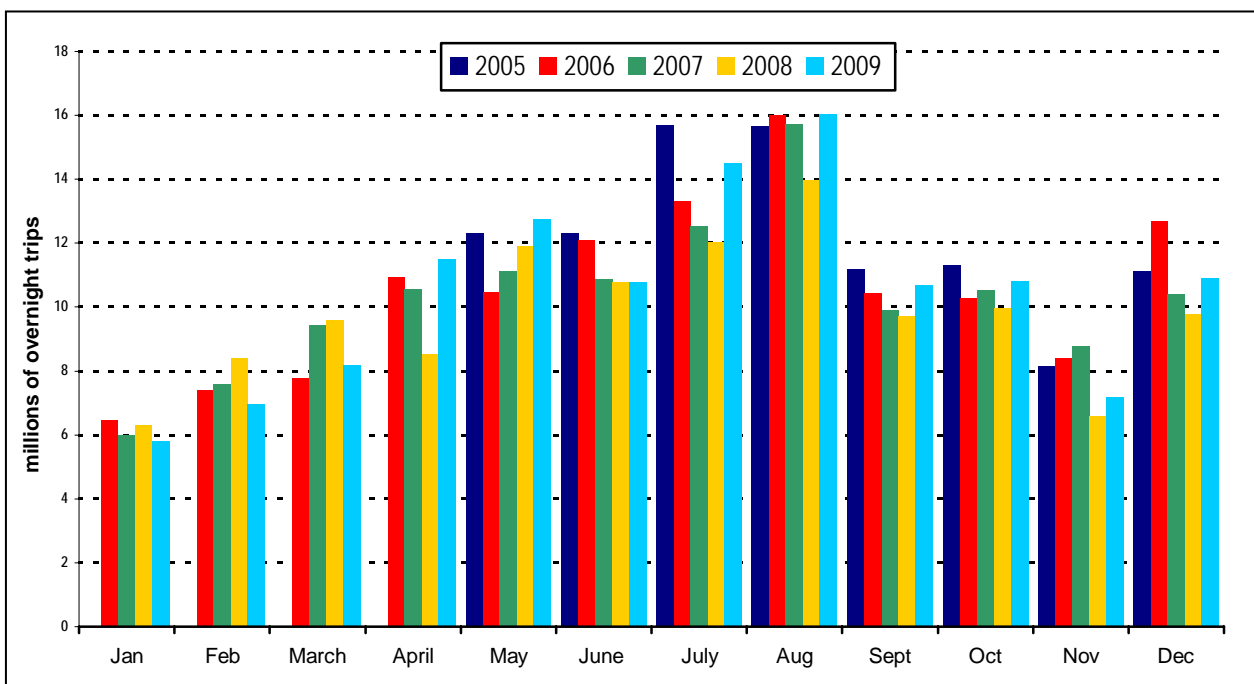
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	52.0	60.7	17%	193.1	222.5	15%	£11,388	£12,612	11%
Business	18.2	18.0	-1%	42.9	42.2	-2%	£4,483	£4,336	-3%
VFR	44.1	44.4	0.8%	128.3	125.7	-2%	£4,750	£4,509	-5%
England									
Holiday	40.0	47.3	18%	142.7	169.5	19%	£8,654	£9,741	13%
Business	15.2	15.0	-1%	34.9	33.6	-4%	£3,594	£3,516	-2%
VFR	37.4	38.2	2%	105.7	103.2	-2%	£3,798	£3,682	-3%

Outbound Travel – UK Residents

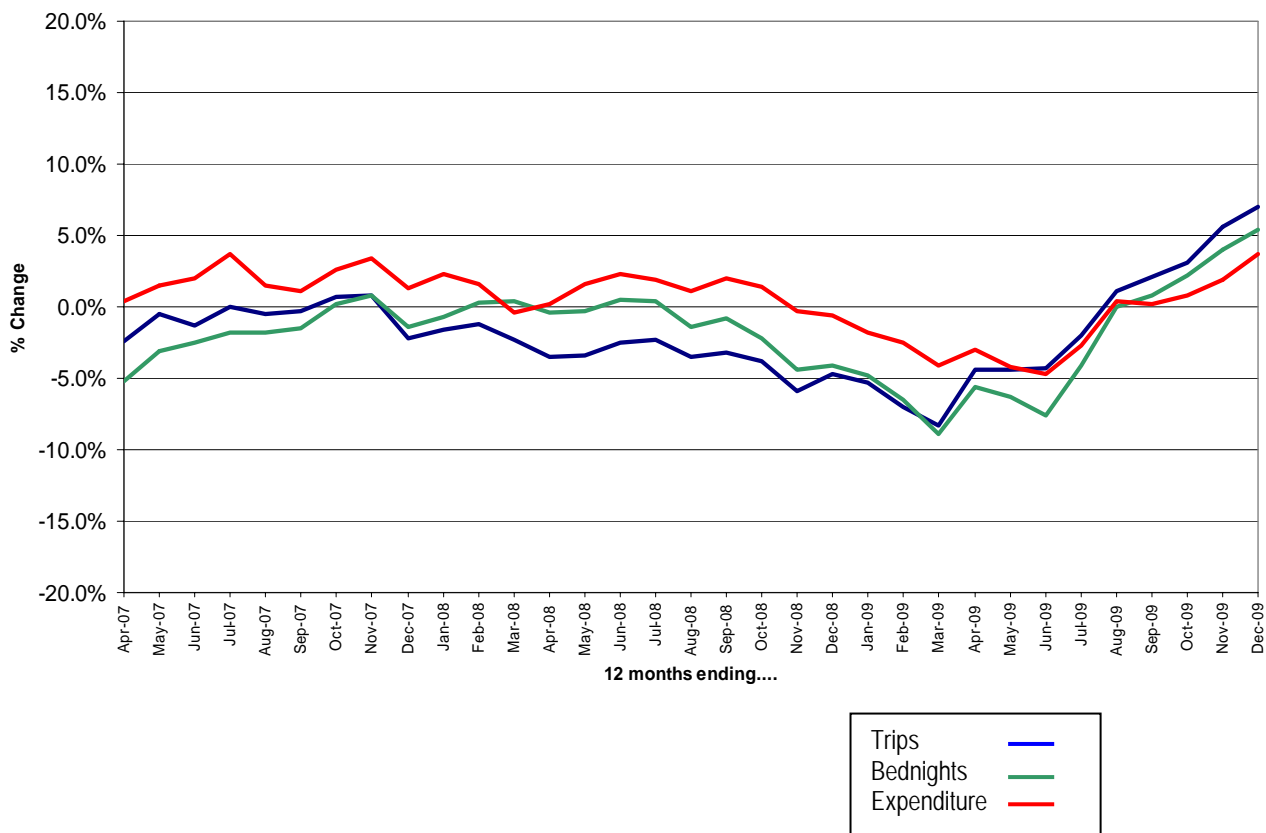
	TRIPS (MILLIONS)			SPEND (£BN)		
	2008	2009	% +/-	2008	2009	% +/-
December 2009	3.7	3.1	-16%	1.9	1.7	-11%
Jan – Dec '09	69.0	58.5	-15%	36.8	31.9	-13%

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 (December 2008 vs December 2009)
- Year to date (January – December 2008 vs January – December 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.

