

UK TOURISM SURVEY – DECEMBER 2010 SUMMARY OF RESULTS

1. Headlines

- In 2010, the volume of overnight trips taken in the UK fell by 5% when compared with 2009, with 6% fewer bednights and a 5% decrease in spend.
- Within England, annual trip volumes fell by 6% while bednights and spend were down by 8% and 6% respectively when compared to 2009.
- During the month of December, the total number of domestic overnight tourism trips made in the UK fell by 22% compared with December 2009.
- At the same time, both the total number of bednights and expenditure declined by 17%.
- Within England, the number of trips taken dropped by 24% while bednights and expenditure also fell by 22% and 21% respectively.
- In 2010 119.4 million overnight trips were taken in the UK, 6.6 million fewer than in 2009.

2. Trip Characteristics

- In 2010 the volume of domestic overnight tourism trips in the UK declined across all trip purposes; “pure holiday trips” by 7% and VFR trips by 4% on 2009 levels while business trips dropped by 6%. Expenditure on business trips fell sharply (by 10%) while holiday spend decreased by 4% and VFR spend by 2%.
- During 2010, the number of domestic overnight trips to seaside and countryside locations fell by 11% and 8% respectively. At the same time overnight trips to more urban locations fell to a lesser extent (trips to small towns were down slightly by 2% while trips to large cities and towns dropped by 4%).
- There were differences by social economic grade with the number of trips taken by the more affluent AB demographic group unchanged compared with 2009 levels while trips taken by the least affluent DE social grade were down by 15%.
- Households with children maintained trip levels, whereas 7% fewer trips were made by households without children.
- According to the Met Office, overall, the prolonged freezing conditions resulted in an exceptionally cold December across the UK: the coldest December in the last 100 years which may have contributed to the decline in trips during the month of December.

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 December results for the past four years.
- This shows very different trends by trip purpose. The number of holiday trips taken in 2010 was 9% higher than in 2008 and 5% higher than in 2007, 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.

4. Overseas Travel by UK Residents

- Travel abroad by British residents declined in 2009 and continued to do so in 2010, with 6% fewer trips taken in 2010 and a 2% reduction in expenditure. Outbound travel in December was down 15% on the same month in 2009.

UK TOURISM SURVEY – DECEMBER 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	% +/-
December '10									
UK	10.9	8.4	-22%	31.6	26.2	-17%	1,519	1,265	-17%
England	9.1	6.9	-24%	26.3	20.6	-22%	1,266	999	-21%
Jan – Dec'10									
UK	126.0	119.4	-5%	398.7	373.3	-6%	21,881	20,835	-5%
England	102.9	96.4	-6%	312.9	288.1	-8%	17,281	16,210	-6%

Purpose of Trip – December 2010

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	2.9	2.2	-25%	8.2	5.9	-28%	631	539	-15%
Business	1.4	1.1	-25%	2.6	2.0	-22%	321	203	-37%
VFR	6.3	5.1	-20%	20.5	18.1	-11%	539	506	-6%
England									
Holiday	2.3	1.9	-19%	6.7	4.8	-28%	524	463	-12%
Business	1.2	0.9	-29%	1.9	1.5	-20%	269	163	-39%
VFR	5.5	4.1	-25%	17.4	14.1	-19%	451	369	-18%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	60.7	56.6	-7%	222.5	202.8	-9%	12,612	12,072	-4%
Business	18.0	16.9	-6%	42.2	39.1	-7%	4,336	3,885	-10%
VFR	44.4	42.8	-4%	125.7	122.1	-3%	4,509	4,434	-2%
England									
Holiday	47.3	43.9	-7%	169.5	153.2	-10%	9,741	9,248	-5%
Business	15.0	13.6	-9%	33.6	30.3	-10%	3,516	3,074	-13%
VFR	38.2	36.2	-5%	103.2	97.7	-5%	3,682	3,543	-4%

Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2009	2010	% +/-	2009	2010	% +/-
December 2010	3.0	2.6	-15%	1.3	1.3	-2%
Jan – Dec '10	58.6	54.8	-6%	31.4	30.7	-2%

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
December '10												
UK	10.4	9.8	10.9	8.4	33.0	29.7	31.6	26.2	1,607	1,377	1,519	1,265
England	8.5	8.2	9.1	6.9	25.7	23.4	26.3	20.6	1,266	1,088	1,266	999
Jan – December '10												
UK	123.5	117.7	126.0	119.4	394.4	378.4	398.7	373.3	21,238	21,107	21,881	20,835
England	100.2	95.5	102.9	96.4	307.8	295.4	312.9	288.1	16,531	16,433	17,281	16,210

Purpose of Trip – December 2010

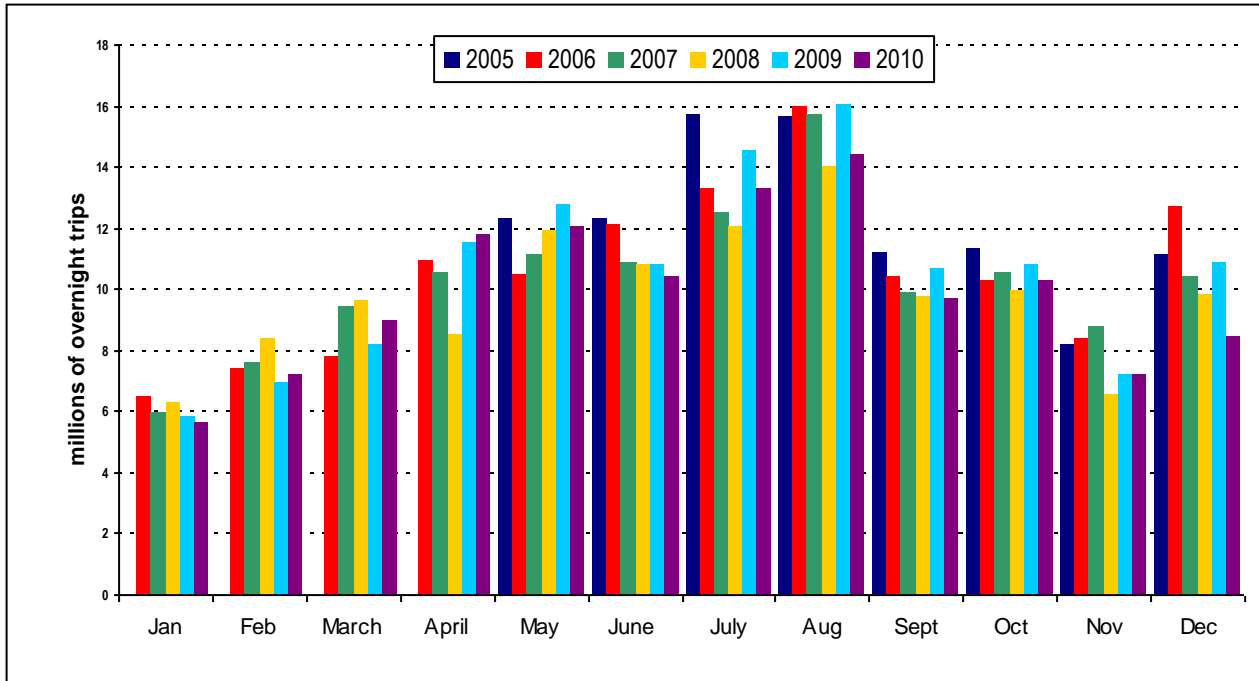
	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
UK												
Holiday	2.8	2.7	2.9	2.2	9.7	7.9	8.2	5.9	670	576	631	539
Business	1.0	1.1	1.4	1.1	2.6	2.1	2.6	2.0	258	250	321	203
VFR	6.4	5.8	6.3	5.1	20.2	19.3	20.5	18.1	639	528	539	506
England												
Holiday	2.3	2.2	2.3	1.9	7.4	5.9	6.7	4.8	526	435	524	463
Business	0.9	1.0	1.2	0.9	2.2	1.8	1.9	1.5	229	230	269	163
VFR	5.2	4.9	5.5	4.1	15.8	15.4	17.4	14.1	480	405	451	369

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

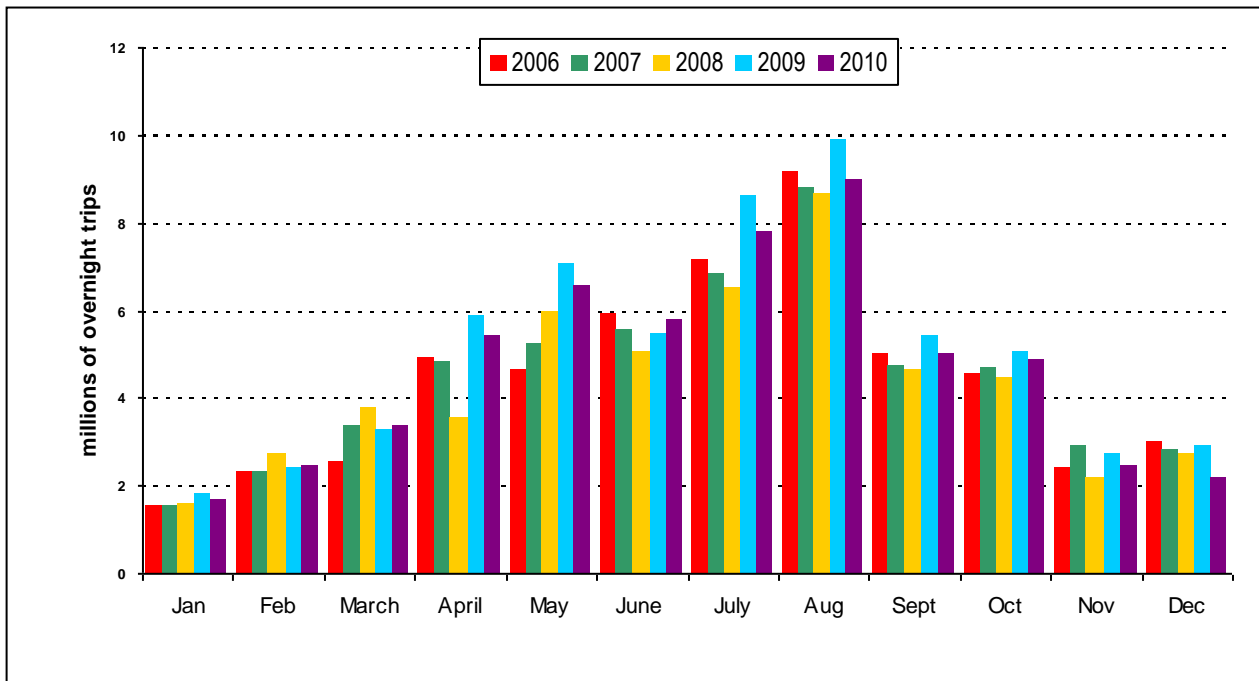
	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
UK												
Holiday	53.7	52.0	60.7	56.6	203.9	193.1	222.5	202.8	11,465	11,388	12,612	12,072
Business	18.7	18.2	18.0	16.9	45.0	42.9	42.2	39.1	4,451	4,483	4,336	3,885
VFR	47.8	44.1	44.4	42.8	134.9	128.3	125.7	122.1	4,835	4,750	4,509	4,434
England												
Holiday	41.6	40.0	47.3	43.9	152.5	142.7	169.5	153.2	8,776	8,654	9,741	9,248
Business	15.4	15.2	15.0	13.6	35.8	34.9	33.6	30.3	3,500	3,594	3,516	3,074
VFR	40.5	37.4	38.2	36.2	111.1	105.7	103.2	97.7	3889	3,798	3,682	3,543

TREND CHARTS

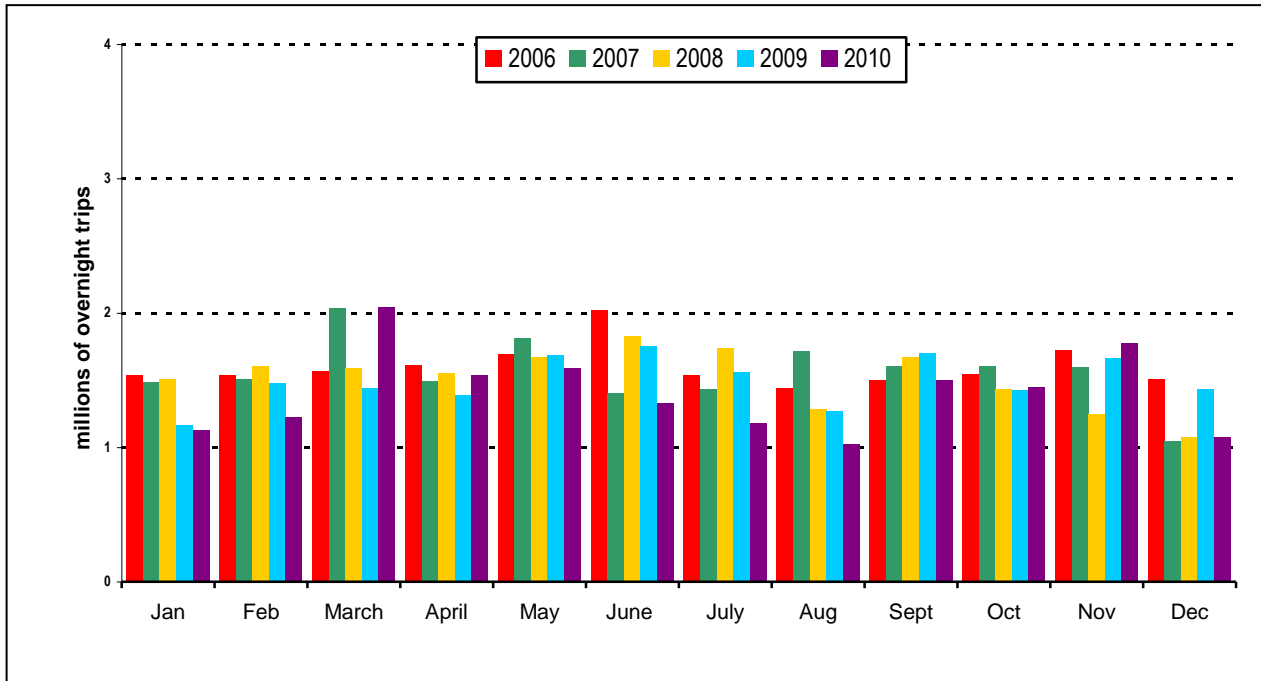
UK All Trips – Domestic Trip Volume by Month



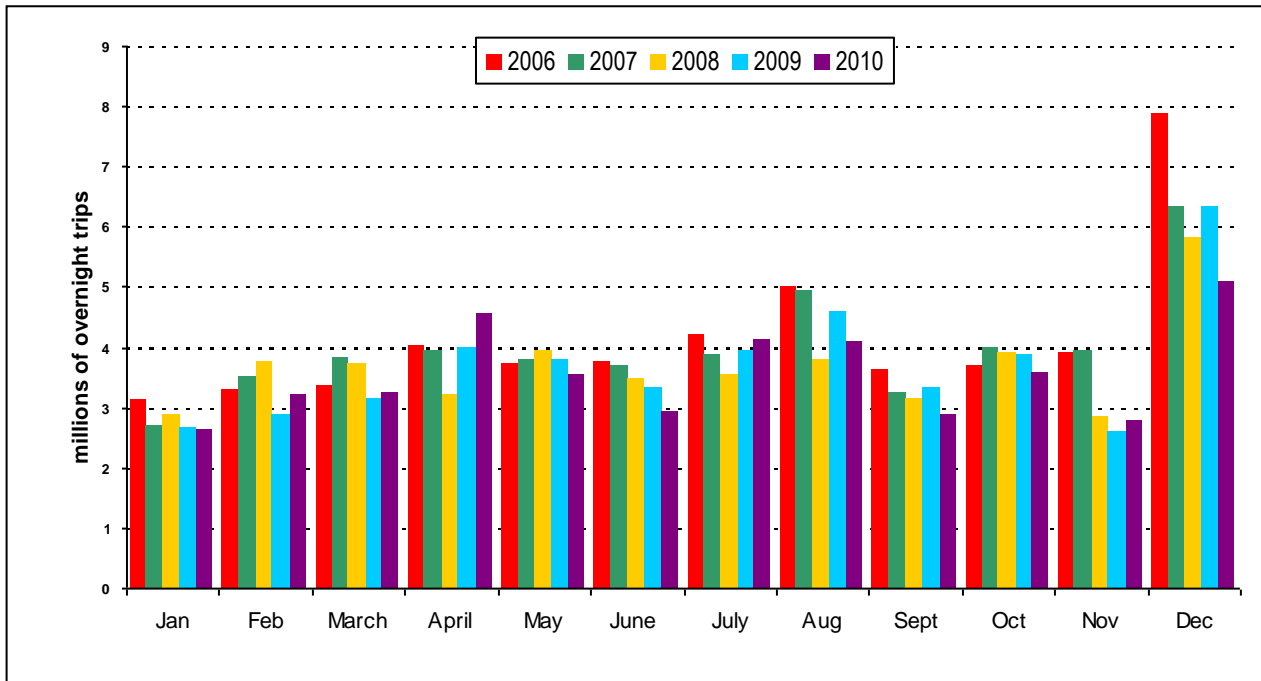
UK Holiday Trips – Domestic Trip Volume by Month



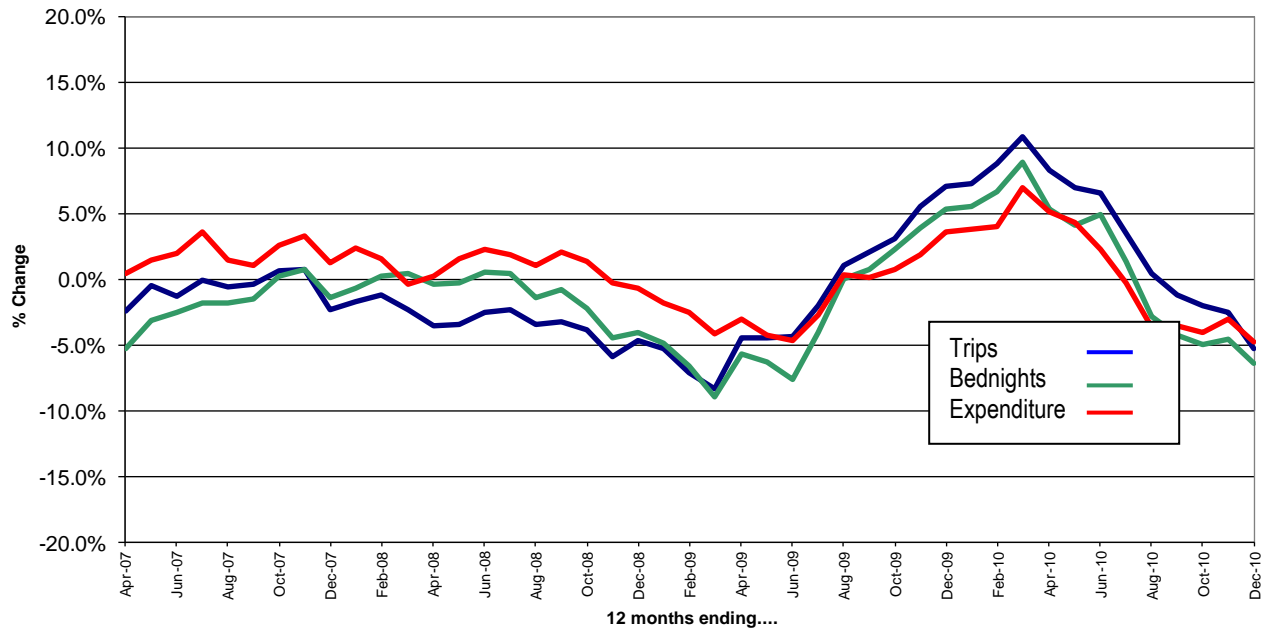
UK Business Trips – Domestic Trip Volume by Month



UK VFR 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 2009 vs. December 2010)
- Year to date (January – December 2009 vs. January – December 2010)
- 12 months (January 2009 – December 2009 vs. January 2009 – December 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.

