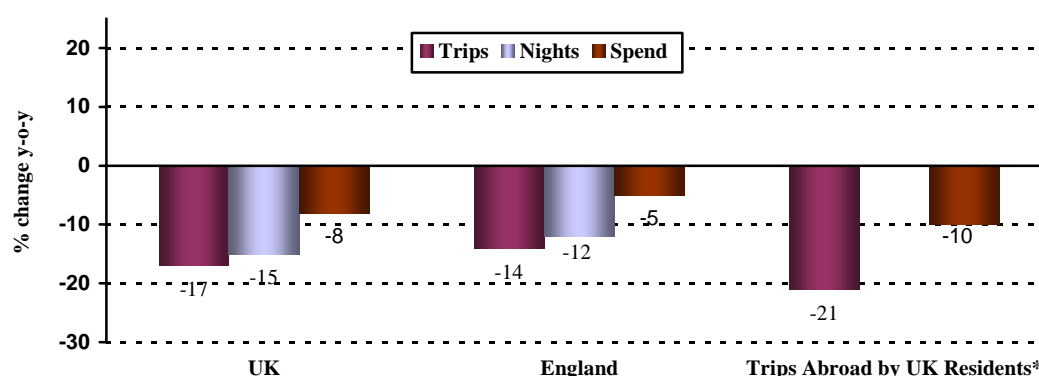


United Kingdom Tourism Survey – February 2009 Update

(1) Overview of February 2009 year-on-year changes



Source: UKTS, *International Passenger Survey

(2) February 2009

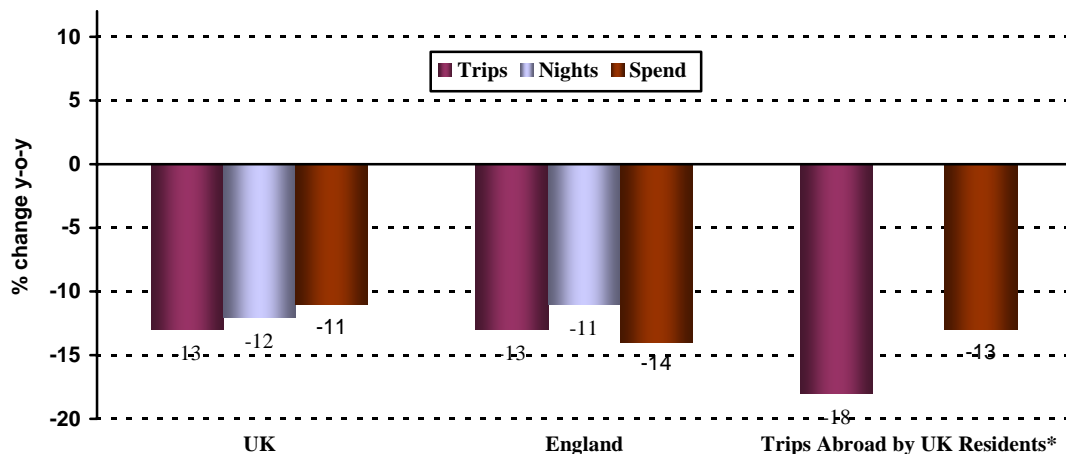
In February, domestic overnight trips fell sharply, however, spend fell less steeply than trips driven by a slightly spend per night. It is worth noting that February saw unusually heavy snowfall (the most widespread since 1991).

There were 7m overnight trips made in the UK by UK residents in February 2009, a fall of -17% from February 2008 – equivalent to 1.4m fewer trips. The number of bed nights fell by -15% to 17.5m during the month reflecting the fall in the number of trips. The value of overnight trips fell by -8% during February - domestic overnight trips were worth £1.2bn compared with £1.3bn in February 2008.

Average spend per night increased by £5 to £68 and average spend per trip rose by £18 to £154 compared to February 2008 (note this does not take into account inflation although this was around 0% at the time). Trips declined across all sectors but most significantly across VFR travel (trips down -24% and nights down -14%). Fewer trips for holiday purposes were also taken (trips dropped by -13% and nights -19%) while business travel also decreased (trips down -9%, nights -7% while spend actually rose by 7%).

	Trips (millions)	Nights (millions)	Spend (£ millions)	Average length of stay (nights)	Average spend per night (£s)	Average spend per trip (£s)
United Kingdom						
Total	7.0	17.5	1,195	2.5	68	172
Holiday	2.4	6.1	461	2.5	76	190
VFR	2.9	7.7	301	2.7	39	105
Business	1.5	3.4	405	2.2	121	263
England						
Total	5.9	14.5	984	2.5	68	167
Holiday	1.9	4.9	357	2.5	73	186
VFR	2.5	6.8	268	2.7	40	106
Business	1.3	2.6	332	1.9	129	249

(3) Overview of Jan-Feb 2009 year-on-year changes % year-on-year change



Source: UKTS, *International Passenger Survey

(4) Jan-Feb '09

12.8m overnight trips were made in the UK by UK residents between Jan and Feb '09, down -13% on the same period the year before, while bed nights fell by -12% with 31.7m bed nights recorded. Expenditure decreased by -11% to around £2.1bn compared to January – February '09.

Within England, trips declined by -13% and VFR and business experienced the steepest decline during the three month period (-14%) compared to January – February '09.

Trips taken Jan-Feb '09	Trips (Millions)			Bed nights (millions)			Expenditure (£ million)		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
United Kingdom									
Total	14.7	12.8	-12.9	36.1	31.7	-12.0	2,327	2,073	-10.9
Holiday	4.4	4.2	-2.8	11.7	11.0	-5.9	897	782	-12.8
VFR	6.6	5.5	-16.7	15.7	13.7	-12.9	587	517	-11.9
Business	3.2	2.8	-14.3	7.4	6.3	-14.8	788	730	-7.4
England									
Total	12.2	10.6	-12.5	29.3	26.0	-11.2	1,895	1,633	-13.8
Holiday	3.5	3.3	-4.8	9.1	8.6	-6.0	714	594	-16.8
VFR	5.6	4.8	-14.4	13.2	11.8	-10.4	466	446	-4.3
Business	2.7	2.3	-14.0	5.9	4.9	-16.5	663	553	-16.6

* all expenditure figures are in historic prices

(5) Trips Abroad by UK Residents in February 2009

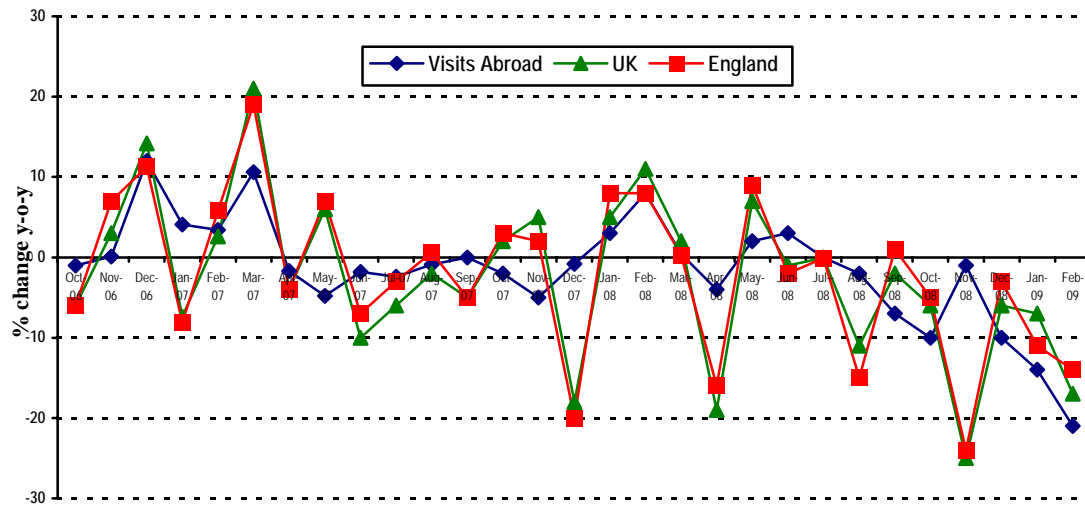
UK residents made 3.6m trips abroad in February 2009, representing a year-on-year decrease of -21%. Spend on overseas trips fell by -10% during the month to £2.2bn.

	Trips '08	Trips '09	Difference	Exp '08	Exp '09	Difference
Feb 2009	4.5m	3.6m	-21%	£2.4bn	£2.2bn	-10%
Jan-Feb 2009	9.2m	7.6m	-18%	£5.1bn	£4.4bn	-13%

Source: International Passenger Survey



(6) UK Resident Trips Abroad vs. UK and England Domestic Trips October 2006-February 2009



Source: UKTS, International Passenger Survey

(7) UK Domestic Trip Volume by Month, 2005-2009

