

## UK TOURISM SURVEY - February 2010 SUMMARY OF RESULTS

### 1. Headlines

- During the month of February, domestic tourism trips in the UK grew by 3% compared to the same month in 2009.
- Although the total number of bednights increased by 4% total expenditure fell by -8%.
- Within England, the number of trips was unchanged compared with February 2009 while nights and spend fell (-2% and -14% respectively).
- In the first two months of 2010 overall trip numbers were unchanged in the UK against January-February, while trips fell fractionally (-1%) in England during the same period.
- In the past 12 months, 126.0 million overnight trips were taken in the UK, 10.2 million more than in the 12 months from March 2008 to February 2009, an increase of 9%.

### 2. Trip Characteristics

- The number of "pure holiday" trips fell slightly (-2%) compared to the first two months of 2009 driven by a 10% decrease in longer 4+ night holiday trips. However, on a positive note "pure holiday" expenditure actually increased during the period.
- Business trips also fell (by -11% in the UK and -13% in England) while business expenditure decreased considerably (-33% in the UK and -28% in England) during the review period.
- Meanwhile visits to friends and family were up by 12% in the UK and 9% in England in the first two months of the year.
- Performance varied by location type; while trips to small towns were up by 12%, trips to seaside and large city/towns fell by 2.6% and 2.7% respectively. Trips to countryside/village locations were down by -6%.
- Interestingly trips in households where there are children were up 13% in the first two months of 2010 and down by -5% in households where there are no children.
- It should be noted that January and February were cold months with widespread snowfall and sharp frosts.

### 3. Overseas Travel by UK Residents

- In February, UK residents made 8% fewer trips abroad than in February 2009 and spent 14% less. In the first two months of the year, trips were down by 10%, with spend down 12%.

### 4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 36% for the month of February (1% higher than in February '09).
- The England Attractions Monitor showed that in the month of February visits to visitor attractions fell by -6% compared with February '09.

## KEY MEASURES



### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
<b>February '10</b>									
UK	7.0	7.2	3%	17.5	18.1	4%	£1,195	£1,110	-7%
England	5.9	5.9	0%	14.5	14.3	-2%	£984	£849	-14%
<b>Jan – Feb'10</b>									
UK	12.8	12.8	0%	31.7	30.6	-4%	£2,073	£1870	-10%
England	10.6	10.5	-1%	26.0	23.9	-8%	£1,633	£1,460	-11%

### Purpose of Trip – February 2010

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
<b>UK</b>									
Holiday	2.4	2.5	2%	6.1	6.8	12%	£461	£496	8%
Business	1.5	1.2	-17%	3.2	2.6	-18%	£378	£257	-32%
VFR	2.9	3.2	12%	7.7	8.2	6%	£301	£314	4%
<b>England</b>									
Holiday	1.9	1.8	-5%	4.9	5.1	4%	£357	£349	-2%
Business	1.3	1.0	-20%	2.5	2.2	-13%	£319	£209	-34%
VFR	2.5	2.8	10%	6.8	6.6	-3%	£268	£252	-6%

### Purpose of Trip – Year to Date (January – February 2010)

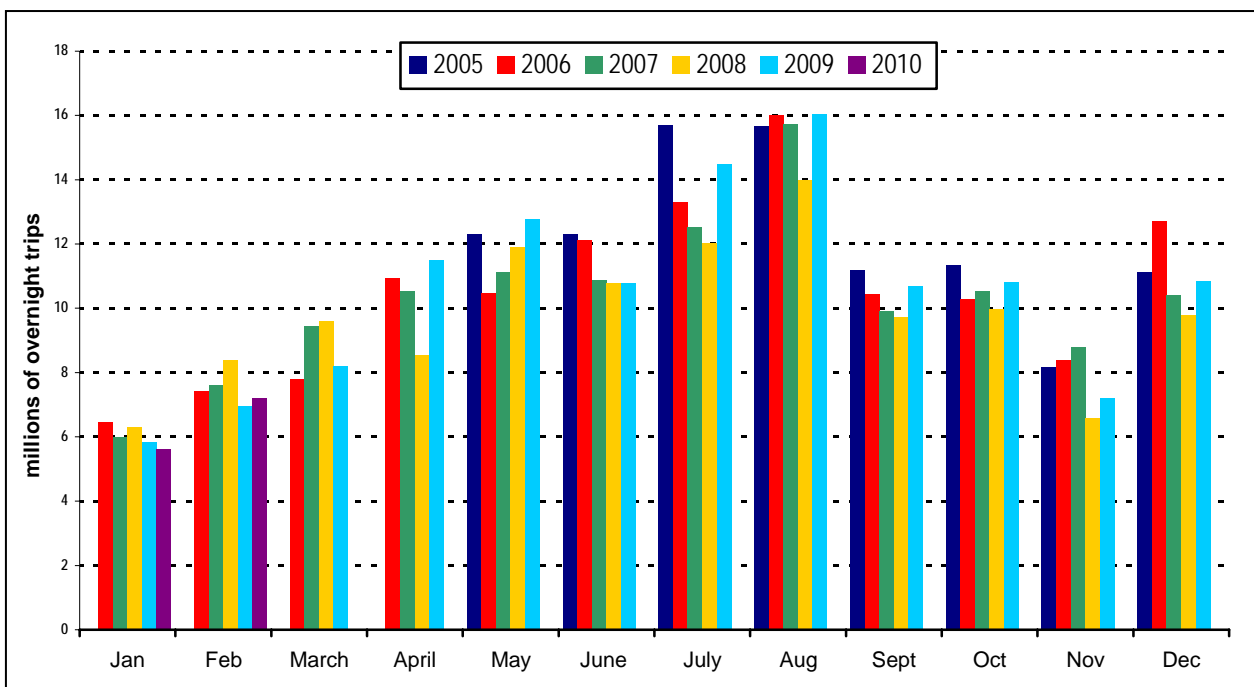
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
<b>UK</b>									
Holiday	4.2	4.2	-2%	11.0	10.5	-5%	£782	£813	4%
Business	2.6	2.4	-11%	6.0	4.7	-21%	£695	£468	-33%
VFR	5.5	5.9	5.8%	13.7	14.5	6%	£517	£517	0%
<b>England</b>									
Holiday	3.3	3.1	-5%	8.6	7.7	-10%	£594	£599	1%
Business	2.2	1.9	-13%	4.8	3.9	-18%	£533	£385	-28%
VFR	4.8	5.0	5%	11.8	11.6	-2%	£446	£411	-8%

### Outbound Travel – UK Residents

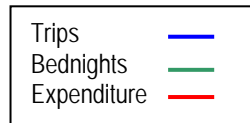
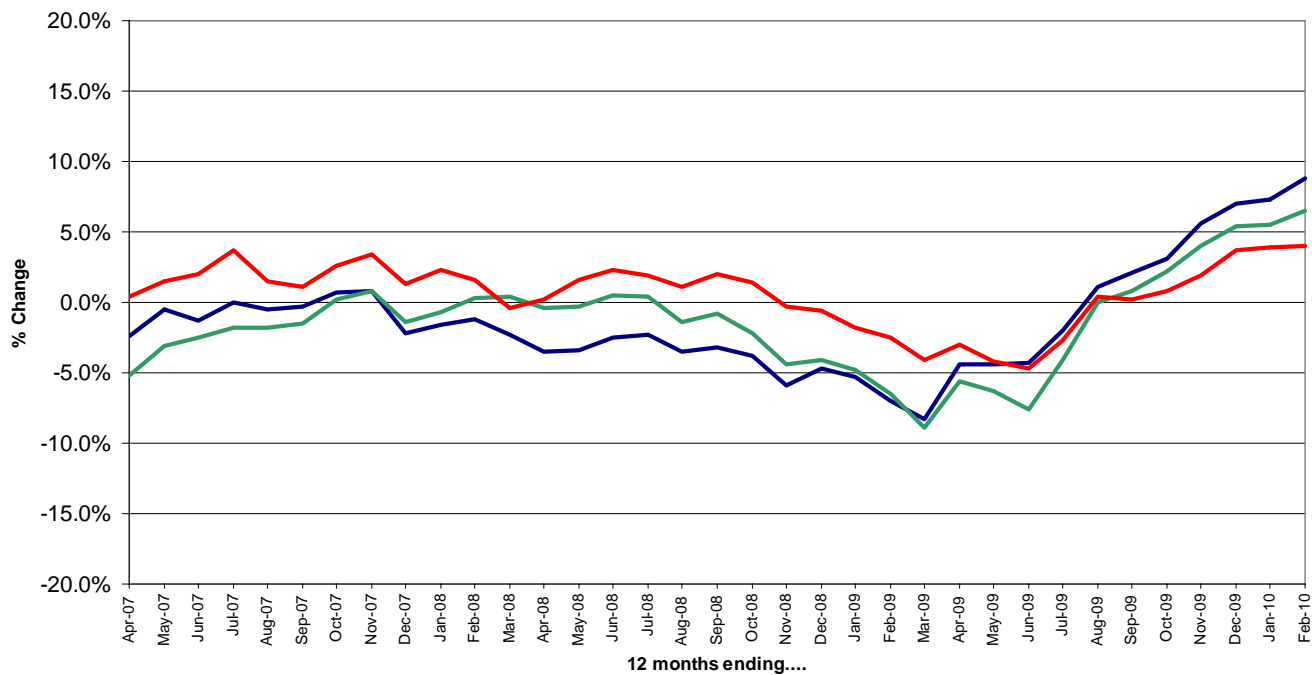
	TRIPS (MILLIONS)			SPEND (£BN)		
	2009	2010	% +/-	2009	2010	% +/-
February 2009	3.5	3.2	-8%	2.2	1.9	-14%
Jan – Feb '10	7.4	6.6	-10%	4.5	3.9	-12%
Mar '09 – Feb '10	67.1	57.7	-14%	37.0	31.2	-14%

## 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 (February 2009 vs February 2010)
- Year to date (January – February 2009 vs January – February 2019)
- 12 months (March 2008 – February 2009 vs March 2009 – February 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

	Month: February 2010			Unweighted Trips	YTD: January - February 2010			Unweighted Trips	2 month rolling March 2009 - February 2010			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
<b>TOTAL</b>	<b>3.4%</b>	<b>3.6%</b>	<b>-7.1%</b>	<b>1043</b>	<b>0.3%</b>	<b>-3.7%</b>	<b>-9.8%</b>	<b>1873</b>	<b>8.8%</b>	<b>6.5%</b>	<b>3.9%</b>	<b>18671</b>
<b>PURPOSE:</b>												
Pure Holiday	2.1%	11.6%	7.6%	375	-2.1%	-4.7%	4.0%	623	16.8%	14.6%	12.1%	9311
- 1-3 nights holiday	1.4%	5.0%	8.6%	284	-0.2%	0.2%	7.7%	497	18.1%	17.8%	8.4%	5570
- 4+ nights holiday	4.3%	20.2%	4.0%	90	-9.5%	-10.9%	-6.8%	126	14.7%	13.0%	16.0%	3741
VFR (on holiday)	17.2%	17.0%	21.0%	256	12.0%	11.7%	8.4%	470	4.5%	6.4%	-2.5%	3690
HOLIDAY (TOTAL)	7.7%	13.8%	10.8%	630	3.4%	1.8%	4.9%	1094	13.0%	12.4%	9.3%	13001
VFR (non-holiday)	6.4%	-6.0%	-13.9%	223	-0.1%	-0.3%	-9.1%	417	3.7%	-5.0%	-5.1%	3073
VFR (TOTAL)	11.9%	6.2%	4.3%	478	5.8%	6.0%	0.0%	887	4.1%	1.6%	-3.6%	6763
Business	-16.9%	-18.5%	-32.0%	155	-10.8%	-20.6%	-32.7%	299	-0.4%	-2.6%	-6.7%	2163
<b>RDA:</b>												
Adv West Midlands	-20.6%	-17.0%	-46.3%	78	-28.7%	-24.3%	-40.1%	127	6.1%	-0.8%	-0.3%	1151
East of England	-31.1%	-15.0%	-25.7%	89	-20.8%	-23.5%	-19.7%	153	9.2%	2.2%	-0.6%	1572
East Midlands	-13.2%	-11.5%	-30.9%	61	-6.8%	-4.6%	-14.0%	112	6.0%	-0.2%	-1.6%	1146
London	18.3%	13.4%	-8.5%	127	29.3%	33.9%	7.4%	254	4.7%	-1.7%	2.1%	1562
North West	-7.5%	-8.0%	-32.1%	108	-14.6%	-16.2%	-21.7%	174	4.8%	2.8%	-1.8%	1962
ONE North East	6.4%	31.0%	88.5%	34	-5.2%	-7.5%	43.4%	67	-8.2%	-6.9%	-12.6%	546
South East England	37.5%	9.0%	13.9%	161	33.6%	6.9%	5.6%	295	18.1%	12.6%	14.4%	2828
South West	1.1%	8.8%	-7.1%	141	-6.1%	-18.6%	-21.3%	226	13.9%	13.1%	14.9%	3183
Yorkshire Forward	-9.9%	-25.1%	4.2%	73	-16.2%	-13.6%	-6.8%	151	9.8%	14.5%	12.4%	1574
<b>LOCATION TYPE:</b>												
Seaside	2.3%	-0.5%	7.9%	144	-2.5%	-11.0%	-5.2%	224	18.8%	17.8%	15.9%	4309
Large city/ large town	-3.0%	-5.6%	-20.1%	466	-2.7%	-7.8%	-18.0%	862	7.8%	-0.8%	-4.8%	6929
Small town	6.3%	1.9%	-2.5%	278	11.9%	1.8%	-7.0%	500	3.5%	0.2%	2.5%	4297
Countryside/ village	15.5%	33.3%	29.4%	180	-6.1%	4.2%	16.1%	317	9.0%	11.6%	12.7%	3639
<b>AGE:</b>												
16-24	11.3%	30.8%	3.5%	144	10.7%	27.1%	0.4%	264	-1.2%	-8.3%	-9.8%	2023
25-34	9.8%	8.5%	-23.0%	172	2.3%	6.8%	-28.9%	312	15.3%	-23.5%	5.3%	3003
35-44	6.1%	4.7%	-8.7%	237	4.2%	-4.9%	-5.2%	413	10.9%	10.6%	2.8%	4158
45-54	-14.7%	-20.9%	-15.0%	175	-13.3%	-25.6%	-20.4%	319	8.2%	10.4%	5.1%	3205
55+	6.8%	4.8%	10.2%	315	0.3%	-4.7%	6.9%	566	8.4%	5.3%	8.7%	6282
<b>SEG:</b>												
AB	17.8%	18.5%	11.2%	382	-1.7%	-6.8%	-10.0%	635	6.6%	3.5%	-0.2%	6034
C1	-5.5%	-9.3%	-21.3%	340	0.6%	-3.5%	-14.1%	626	8.9%	9.9%	9.2%	5833
C2	-14.0%	-22.7%	-14.7%	135	1.7%	-10.1%	13.4%	281	7.7%	-0.3%	1.3%	3223
DE	8.2%	28.2%	-12.7%	186	4.3%	11.2%	-20.8%	330	15.4%	13.5%	7.8%	3580
<b>CHILDREN IN H/H:</b>												
Any	9.6%	0.9%	-14.4%	374	13.3%	1.6%	-10.9%	661	12.0%	12.2%	1.5%	6564
None	0.6%	4.8%	-4.1%	668	-4.7%	-5.6%	-9.5%	1211	7.4%	3.9%	4.9%	12106
<b>ACCOMMODATION:</b>												
Commercial accom	-1.2%	-0.9%	-6.2%	544	-2.0%	-8.8%	-9.7%	943	11.1%	8.7%	5.7%	10584
- Serviced accom	-4.1%	-4.7%	-8.9%	449	-1.3%	-4.3%	-8.6%	800	7.3%	4.4%	1.3%	6882
- Hotel/motel/guesthouse	1.7%	1.1%	-4.6%	422	0.5%	-2.7%	-7.4%	743	7.8%	4.2%	0.5%	6083
- Bed & Breakfast	-47.0%	-50.3%	-53.8%	29	-19.7%	-19.8%	-25.0%	58	1.5%	5.2%	7.6%	834
Total self-catering rented	30.5%	21.8%	29.8%	73	0.0%	-22.1%	-15.7%	108	25.1%	18.9%	18.8%	3394
- Camping & Caravanning (inc. owned caravans)	49.0%	88.4%	177.8%	21	7.9%	-9.7%	-3.2%	32	22.4%	16.7%	15.2%	2686
- Other self-catering rented	22.8%	12.0%	14.5%	55	-3.2%	-24.0%	-19.9%	83	22.4%	15.8%	19.0%	1305
Hostels	13.0%	-12.7%	-35.7%	16	14.0%	27.4%	-5.6%	28	-8.7%	-19.1%	-4.9%	226
Own home/friends/relatives	6.0%	2.9%	-11.7%	479	0.4%	-2.6%	-11.6%	888	6.2%	2.8%	-1.5%	7849

## Comparisons with equivalent periods, 2009

	Month: February 2010			Unweighted Trips	YTD: January - February 2010			Unweighted Trips	2 month rolling March 2009 - February 2010			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
<b>TOTAL</b>	<b>0.2%</b>	<b>-1.6%</b>	<b>-13.7%</b>	<b>856</b>	<b>-1.3%</b>	<b>-8.0%</b>	<b>-10.6%</b>	<b>1535</b>	<b>9.4%</b>	<b>6.7%</b>	<b>5.8%</b>	<b>15230</b>
<b>PURPOSE:</b>												
Pure Holiday	-4.6%	4.3%	-2.2%	277	-5.5%	-10.4%	0.8%	468	18.1%	17.6%	14.2%	7242
- 1-3 nights holiday	-2.0%	3.4%	-3.9%	211	-0.5%	3.6%	5.3%	378	19.2%	20.0%	7.8%	4383
- 4+ nights holiday	-13.2%	5.3%	2.0%	65	-23.7%	-25.3%	-11.0%	90	16.2%	16.4%	21.3%	2852
VFR (on holiday)	14.1%	5.3%	10.1%	219	8.6%	1.1%	0.0%	394	6.2%	5.6%	0.9%	3116
HOLIDAY (TOTAL)	2.9%	4.7%	1.2%	495	0.3%	-5.6%	0.6%	862	14.2%	14.2%	11.6%	10358
VFR (non-holiday)	6.4%	-11.2%	-23.3%	197	1.3%	-5.5%	-16.2%	367	3.9%	-6.5%	-8.6%	2691
VFR (TOTAL)	10.3%	-2.6%	-6.0%	415	4.8%	-2.1%	-7.8%	761	5.1%	0.3%	-3.4%	5809
Business	-20.4%	-12.7%	-34.5%	129	-13.3%	-17.6%	-27.8%	245	-0.1%	-3.6%	-3.0%	1804
<b>RDA:</b>												
Adv West Midlands	-20.6%	-17.0%	-46.3%	78	-28.7%	-24.3%	-40.1%	127	6.1%	-0.8%	-0.3%	1151
East of England	-31.1%	-15.0%	-25.7%	89	-20.8%	-23.5%	-19.7%	153	9.2%	2.2%	-0.6%	1572
East Midlands	-13.2%	-11.5%	-30.9%	61	-6.8%	-4.6%	-14.0%	112	6.0%	-0.2%	-1.6%	1146
London	18.3%	13.4%	-8.5%	127	29.3%	33.9%	7.4%	254	4.7%	-1.7%	2.1%	1562
North West	-7.5%	-8.0%	-32.1%	108	-14.6%	-16.2%	-21.7%	174	4.8%	2.8%	-1.8%	1962
ONE North East	6.4%	31.0%	88.5%	34	-5.2%	-7.5%	43.4%	67	-8.2%	-6.9%	-12.6%	546
South East England	37.5%	9.0%	13.9%	161	33.6%	6.9%	5.6%	295	18.1%	12.6%	14.4%	2828
South West	1.1%	8.8%	-7.1%	141	-6.1%	-18.6%	-21.3%	226	13.9%	13.1%	14.9%	3183
Yorkshire Forward	-9.9%	-25.1%	4.2%	73	-16.2%	-13.6%	-6.8%	151	9.8%	14.5%	12.4%	1574
<b>LOCATION TYPE:</b>												
Seaside	9.9%	6.7%	7.9%	116	4.8%	-7.2%	-3.5%	6	21.7%	20.2%	17.8%	3426
Large city/ large town	-1.5%	-9.1%	-25.2%	411	-0.7%	-8.5%	-14.6%	752	8.2%	-0.7%	-2.7%	5885
Small town	-4.8%	-7.0%	-14.8%	215	4.9%	-6.3%	-13.4%	393	3.9%	0.8%	5.4%	3447
Countryside/ village	2.7%	20.6%	32.4%	134	-16.9%	-9.0%	8.0%	229	8.2%	9.2%	12.9%	2860
<b>AGE:</b>												
16-24	15.6%	18.0%	10.6%	123	9.6%	16.9%	-0.5%	219	-4.9%	-13.0%	-12.4%	1659
25-34	7.6%	7.4%	-31.2%	145	4.5%	3.8%	-27.5%	262	19.2%	15.6%	7.9%	2483
35-44	-1.7%	-2.9%	-18.5%	187	-3.5%	-15.3%	-14.8%	323	11.4%	10.1%	6.7%	3344
45-54	-22.2%	-25.8%	-26.5%	134	-12.3%	-24.2%	-15.4%	256	7.9%	8.0%	6.9%	2550
55+	6.8%	1.7%	5.8%	269	-0.7%	-9.1%	5.6%	480	9.9%	7.7%	10.5%	5210
<b>SEG:</b>												
AB	15.2%	14.9%	5.6%	317	-2.1%	-9.4%	-7.5%	528	7.0%	1.7%	3.3%	4977
C1	-7.3%	-14.8%	-27.1%	284	-1.8%	-10.7%	-15.9%	521	6.8%	8.9%	7.5%	4740
C2	-19.0%	-30.3%	-20.8%	106	-3.4%	-19.6%	7.7%	216	11.4%	3.3%	5.2%	2630
DE	1.6%	25.1%	-22.3%	146	4.9%	14.8%	-24.9%	267	19.3%	16.3%	10.1%	2867
<b>CHILDREN IN H/H:</b>												
Any	4.8%	-2.8%	-23.9%	308	13.5%	-0.7%	-14.2%	548	13.8%	12.9%	6.2%	5339
None	-1.9%	-1.1%	-9.3%	547	-6.9%	-10.7%	-9.3%	987	7.4%	3.9%	5.6%	9888
<b>ACCOMMODATION:</b>												
Commercial accom	-6.6%	-3.8%	-11.9%	428	-3.8%	-9.9%	-7.2%	755	12.7%	11.3%	8.5%	8532
- Serviced accom	-10.1%	-9.0%	-16.8%	355	-3.5%	-5.0%	-6.5%	647	8.3%	6.6%	3.3%	5628
- Hotel/motel/guesthouse	-5.6%	-3.7%	-14.4%	333	-2.9%	-4.0%	-6.3%	597	9.2%	6.6%	2.9%	5005
- Bed & Breakfast	-47.8%	-53.2%	-47.7%	22	-11.1%	-14.3%	-11.1%	50	-0.6%	6.2%	7.0%	647
Total self-catering rented	34.7%	28.1%	63.3%	51	-6.5%	-33.3%	-13.9%	73	30.0%	24.2%	24.3%	2655
- Camping & Caravanning (inc. owned caravans)	46.8%	101.2%	233.3%	13	-8.8%	-13.5%	-36.4%	20	29.8%	26.0%	4.0%	2046
- Other self-catering rented	31.9%	19.0%	60.0%	40	-6.1%							