**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.
### Year on Year Comparison – All Trips

<table>
<thead>
<tr>
<th></th>
<th>TRIPS (MILLIONS)</th>
<th>NIGHTS (MILLIONS)</th>
<th>SPEND (£M)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2009</td>
<td>2010</td>
<td>% +/-</td>
</tr>
<tr>
<td><strong>February ‘10</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>7.0</td>
<td>7.2</td>
<td>3%</td>
</tr>
<tr>
<td>England</td>
<td>5.9</td>
<td>5.9</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Jan – Feb’10</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>12.8</td>
<td>12.8</td>
<td>0%</td>
</tr>
<tr>
<td>England</td>
<td>10.6</td>
<td>10.5</td>
<td>-1%</td>
</tr>
</tbody>
</table>

### Purpose of Trip – February 2010

<table>
<thead>
<tr>
<th></th>
<th>TRIPS (MILLIONS)</th>
<th>NIGHTS (MILLIONS)</th>
<th>SPEND (£M)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2009</td>
<td>2010</td>
<td>% +/-</td>
</tr>
<tr>
<td><strong>UK</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>2.4</td>
<td>2.5</td>
<td>2%</td>
</tr>
<tr>
<td>Business</td>
<td>1.5</td>
<td>1.2</td>
<td>-17%</td>
</tr>
<tr>
<td>VFR</td>
<td>2.9</td>
<td>3.2</td>
<td>12%</td>
</tr>
<tr>
<td><strong>England</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>1.9</td>
<td>1.8</td>
<td>-5%</td>
</tr>
<tr>
<td>Business</td>
<td>1.3</td>
<td>1.0</td>
<td>-20%</td>
</tr>
<tr>
<td>VFR</td>
<td>2.5</td>
<td>2.8</td>
<td>10%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>TRIPS (MILLIONS)</th>
<th>NIGHTS (MILLIONS)</th>
<th>SPEND (£M)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2009</td>
<td>2010</td>
<td>% +/-</td>
</tr>
<tr>
<td><strong>UK</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>4.2</td>
<td>4.2</td>
<td>-2%</td>
</tr>
<tr>
<td>Business</td>
<td>2.6</td>
<td>2.4</td>
<td>-11%</td>
</tr>
<tr>
<td>VFR</td>
<td>5.5</td>
<td>5.9</td>
<td>5.8%</td>
</tr>
<tr>
<td><strong>England</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>3.3</td>
<td>3.1</td>
<td>-5%</td>
</tr>
<tr>
<td>Business</td>
<td>2.2</td>
<td>1.9</td>
<td>-13%</td>
</tr>
<tr>
<td>VFR</td>
<td>4.8</td>
<td>5.0</td>
<td>5%</td>
</tr>
</tbody>
</table>

### Outbound Travel – UK Residents

<table>
<thead>
<tr>
<th></th>
<th>TRIPS (MILLIONS)</th>
<th>SPEND (£BN)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2009</td>
<td>2010</td>
</tr>
<tr>
<td><strong>February 2009</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.5</td>
<td>3.2</td>
</tr>
<tr>
<td><strong>Jan – Feb’10</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>7.4</td>
<td>6.6</td>
</tr>
<tr>
<td><strong>Mar ’09 – Feb ’10</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>67.1</td>
<td>57.7</td>
</tr>
</tbody>
</table>
TREND CHARTS

UK All Trips – Domestic Trip Volume by Month

![Bar chart showing domestic trip volume by month for UK All Trips from 2005 to 2010.]

UK All Trips - Annual Percentage Change

![Line chart showing annual percentage change for UK All Trips from 2007 to 2010.]

% Change

12 months ending....

-20.0%

-15.0%

-10.0%

-5.0%

0.0%

5.0%

10.0%

15.0%

20.0%

Apr-07 May-07 Jun-07 Jul-07 Aug-07 Sep-07 Oct-07 Nov-07 Dec-07 Jan-08 Feb-08 Mar-08 Apr-08 May-08 Jun-08 Jul-08 Aug-08 Sep-08 Oct-08 Nov-08 Dec-08 Jan-09 Feb-09 Mar-09 Apr-09 May-09 Jun-09 Jul-09 Aug-09 Sep-09 Oct-09 Nov-09 Dec-09 Jan-10 Feb-10

Trips

Bednights

Expenditure
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**

### PERFORMANCE

**Legend:**
- The blue bars 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 changes where differences are particularly low compared to the average. The contents of unweighted trips are also displayed to indicate where sample sizes are small.
- Where there are less than 75 unweighted trips, an 'average per cent' is calculated and indicated by a thin black line. These changes are not necessarily statistically significant.

### United Kingdom

<table>
<thead>
<tr>
<th>Month</th>
<th>Trips</th>
<th>Bednights</th>
<th>Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 2010</td>
<td>18671</td>
<td>15230</td>
<td>9311</td>
</tr>
<tr>
<td>Jan - Feb 2010</td>
<td>16872</td>
<td>14270</td>
<td>7855</td>
</tr>
<tr>
<td>Mar 2009 - Feb 2010</td>
<td>18672</td>
<td>15230</td>
<td>9311</td>
</tr>
</tbody>
</table>

### England

<table>
<thead>
<tr>
<th>Month</th>
<th>Trips</th>
<th>Bednights</th>
<th>Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 2010</td>
<td>2163</td>
<td>1740</td>
<td>901</td>
</tr>
<tr>
<td>Jan - Feb 2010</td>
<td>1986</td>
<td>1600</td>
<td>800</td>
</tr>
<tr>
<td>Mar 2009 - Feb 2010</td>
<td>2163</td>
<td>1740</td>
<td>901</td>
</tr>
</tbody>
</table>

### Location Type:

- **Voluntary and non-independent accommodation:**
  - **Self-catering:**
    - Total self-catering rented: 5339
    - Other self-catering rented: 1305
  - **Hostels:**
    - 16
  - **Camping & Caravanning:**
    - 13

### Age:

- **Children:**
  - 30.0% 15-21 years
  - 31.8% 12-15 years
  - 13.8% under 12 years
  - 8.8% under 5 years

### Seg:

- **Commercial accommodation:**
  - 11.8% 18-24 years
  - 6.4% 55+ years
  - 17.8% 25-34 years
  - 32.5% 35-44 years
  - 3.6% 45-54 years
  - 9.2% 16-24 years

### SEG:

- **Ab:**
  - 15.2% 14-18 years
  - 16.4% 18-24 years
  - 15.2% 25-34 years
  - 9.9% 25-34 years

### Child and adult visitors:

- **Children:**
  - 3.6% under 5 years
  - 11.1% 5-11 years
  - 12.1% 12-15 years
  - 12.2% 16-24 years
  - 13.7% 25-34 years
  - 12.9% 35-44 years

- **Adults:**
  - 8.5% 16-24 years
  - 11.5% 25-34 years
  - 11.8% 35-44 years
  - 12.1% 45-54 years
  - 8.8% 55+ years

### Avatar: UKTS in Focus 2009

- **United Kingdom:**
  - 3.6% under 5 years
  - 16.8% 5-11 years
  - 12.1% 12-15 years
  - 12.2% 16-24 years
  - 13.7% 25-34 years
  - 12.9% 35-44 years
  - 13.1% 45-54 years
  - 8.8% 55+ years

- **England:**
  - 3.6% under 5 years
  - 16.8% 5-11 years
  - 12.1% 12-15 years
  - 12.2% 16-24 years
  - 13.7% 25-34 years
  - 12.9% 35-44 years
  - 13.1% 45-54 years
  - 8.8% 55+ years

### Purpose:

- **Pure Holiday:**
  - 11.6% 18-24 years
  - 3.6% 55+ years
  - 11.6% 25-34 years
  - 11.6% 35-44 years
  - 11.6% 45-54 years

- **1-7 nights holiday:**
  - 13.8% 18-24 years
  - 6.1% 25-34 years
  - 4.3% 35-44 years
  - 3.6% 45-54 years

- **VFR (on holiday):**
  - 20.1% 18-24 years
  - 3.6% 25-34 years
  - 3.6% 35-44 years
  - 3.6% 45-54 years

- **HOLIDAY (TOTAL):**
  - 20.1% 18-24 years
  - 6.1% 25-34 years
  - 3.6% 35-44 years
  - 3.6% 45-54 years

- **VFR (nonholiday):**
  - 20.1% 18-24 years
  - 6.1% 25-34 years
  - 3.6% 35-44 years
  - 3.6% 45-54 years

- **Business:**
  - 20.1% 18-24 years
  - 6.1% 25-34 years
  - 3.6% 35-44 years
  - 3.6% 45-54 years

### Location:

- **One North East:**
  - 43.8% 18-24 years
  - 22.6% 25-34 years
  - 22.6% 35-44 years
  - 17.8% 45-54 years

- **South West:**
  - 43.8% 18-24 years
  - 22.6% 25-34 years
  - 22.6% 35-44 years
  - 17.8% 45-54 years

### Month:

- **Feb 2010:**
  - 18671 trips
  - 15230 bednights
  - 9311 expenditure

- **Jan - Feb 2010:**
  - 16872 trips
  - 14270 bednights
  - 7855 expenditure

- **Mar 2009 - Feb 2010:**
  - 18672 trips
  - 15230 bednights
  - 9311 expenditure

### YTD:

- **Trips:**
  - 2010: 18671
  - 2009: 16872

- **Bednights:**
  - 2010: 15230
  - 2009: 14270

- **Expenditure:**
  - 2010: 9311
  - 2009: 7855