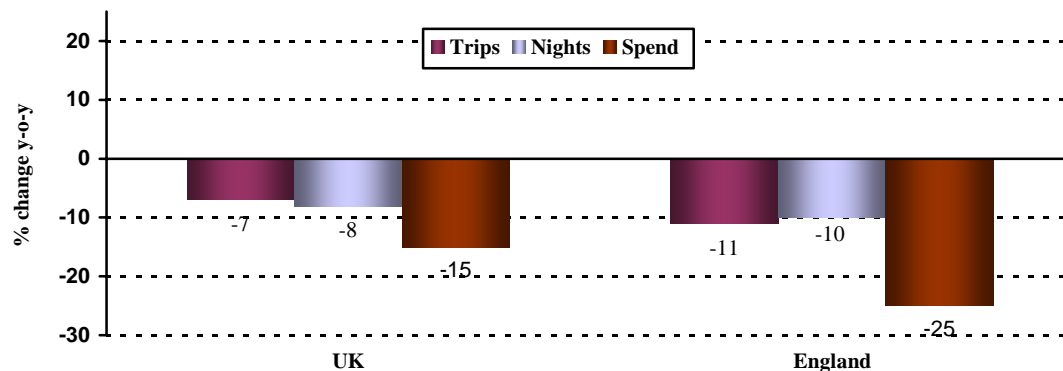


## United Kingdom Tourism Survey – January 2009 Update

### (1) Overview of January 2009 year-on-year changes



Source: UKTS, \*International Passenger Survey data for this period is expected to be available by mid-May

### (2) January 2009

In January, domestic overnight trips declined at a similar rate to December, albeit less steeply than in November. However, spend continued to fall far more steeply than the number of trips taken due to a lower spend per night, possibly a reflection of the continued trend towards widespread value offers and discounting. There were different trends by trip purpose, with holiday travel up, but VFR and business falling.

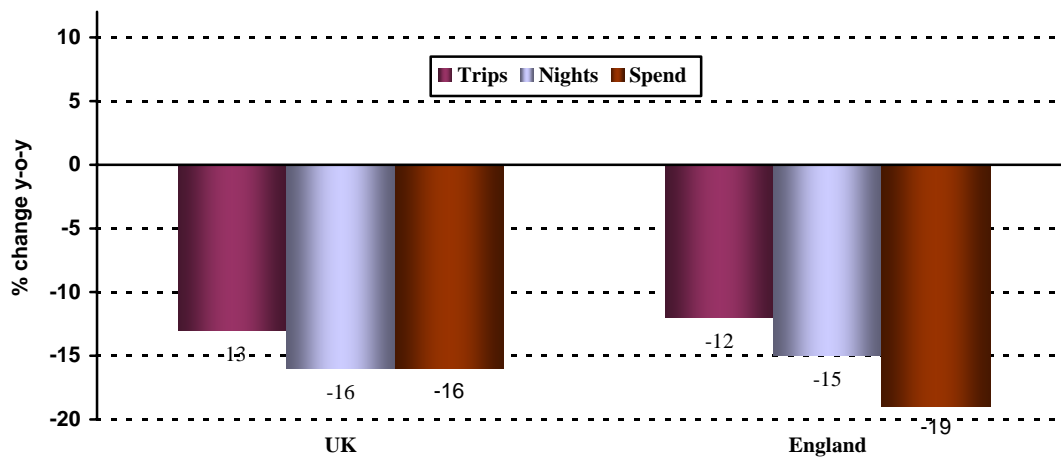
There were 5.8m overnight trips made in the UK by UK residents in January 2009, a fall of -7% from January 2008 – equivalent to 0.5m fewer trips. The number of bed nights fell by -8% to 14.2m during the month reflecting the fall in the number of trips. The value of overnight trips fell by -15% during January - domestic overnight trips were worth £878bn compared with £1.03bn in January 2008.

Average spend per night decreased by £5 to £62 and average spend per trip fell by £13 to £151 compared to January 2008 (note this does not take into account inflation which was around 0.1% at the time). The overall decline in trips taken was driven, as was the case in December, by a reduction in VFR travel (trips down -8% and nights -21%) and business travel (trips -22% and nights -21%). Holidays, though relatively unimportant at this time of year, actually increased (trips +12% and nights +18%).

In England there were 4.7m domestic overnight trips, -11% less than in January 2008 (equivalent to around 0.5m less trips) while nights and expenditure decreased by -10% and -25% respectively, again driven by a fall in business travel and VFR travel, while holiday trips rose by 5%.

	Trips (millions)	Nights (millions)	Spend (£ millions)	Average length of stay (nights)	Average spend per night (£s)	Average spend per trip (£s)
<b>United Kingdom</b>						
<b>Total</b>	5.8	14.2	878	2.4	62	151
<b>Holiday</b>	1.8	4.9	321	2.7	66	177
<b>VFR</b>	2.7	6.0	216	2.2	36	81
<b>Business</b>	1.2	2.9	325	2.4	111	268
<b>England</b>						
<b>Total</b>	4.7	11.5	649	2.4	56	137
<b>Holiday</b>	1.4	3.7	237	2.7	63	171
<b>VFR</b>	2.3	5.0	177	2.2	35	78
<b>Business</b>	1.0	2.3	221	2.4	94	225

### (3) Overview of 3 months performance (Nov'08 – Jan'09) % year-on-year change



Source: UKTS, International Passenger Survey

### (4) 3 Month Performance (Nov'08 – Jan'09)

22.2m overnight trips were made in the UK by UK residents between Nov'08 and Jan'09, down -13% on the same period the year before, while bed nights fell by -16% with 60.1m bed nights recorded. Expenditure decreased by -16% to around £3.4bn compared to November '07 – January '08.

Within England, trips declined by -12% and, like the monthly results, VFR and business experienced the steepest decline during the three month period (-12%) compared to Nov'07 – Jan '08.

Trips taken Nov-Jan	Trips (Millions)			Bed nights (millions)			Expenditure (£ million)		
	2007/8	2008/9	% Change	2007/8	2008/9	% Change	2007/8	2008/9	% Change
<b>United Kingdom</b>									
<b>Total</b>	25.5	22.2	-13	71.9	60.1	-16	4,063	3415	-16
Holiday	7.4	6.7	-9	21.4	18.8	-12	1,640	1436	-12
VFR	13.2	11.3	-14	37.7	32.0	-15	1,268	1044	-18
Business	4.3	3.8	-12	10.8	8.0	-26	1,062	894	-16
<b>England</b>									
<b>Total</b>	21.0	18.5	-12	56.7	48.1	-15	3,265	2651	-19
Holiday	5.8	5.3	-9	16.5	14.4	-13	1,295	1077	-17
VFR	11.1	9.7	-12	30.4	26.1	-14	1,014	837	-17
Business	3.5	3.1	-12	8.3	6.4	-23	879	701	-20

\* all expenditure figures are in historic prices

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

