

UK TOURISM SURVEY – JULY 2010 SUMMARY OF RESULTS

1. Headlines

- In the month of July 2010, the number of domestic overnight tourism trips in the UK was 8% lower than in the same month of 2009.
- This decline was reflected in a lower number of bednights (down 5%) and a reduction in spend (-7%).
- Within England, trips were down by 9% against July 2009 while nights and spend fell by 7% and 8% respectively.
- Between January and July 2010, the number of overnight trips taken in the UK was 2% lower than in the first seven months of 2009, with 5% fewer bednights and a 5% reduction in spend.
- Similarly, in England, 4% fewer trips were taken between January and July than in 2009, with 8% fewer bednights and 7% less expenditure.
- Considering the past 12 months, the number of trips taken was 4% higher than in the period between August 2008 and July 2009. Bednights increased by 1%, while expenditure remained at the same level.

2. Trip Characteristics

- The first seven months of the year have seen the volume of both holiday and business trips decline by 4% in the UK, with longer (4+ night) holidays affected more (-7%) than shorter breaks (-3%).
- Holiday expenditure has fallen back by 3% over the same period, whereas business spend has dropped back sharply by 13%, the result of a much lower average trip length than in 2009.
- Although there has been a slight increase (+2%) in the number of trips made to visit friends and relatives, this is not reflected in spend on this trip type, which has fallen by 4% year on year.
- It is notable that the steepest decline in activity is in the least affluent DE social grade, with a 10% reduction in trip volumes, compared to a modest increase (+2%) among better-off AB's.
- In a reversal of last year's trends, fewer trips have been taken to seaside destinations so far this year (-9%), while trips to small towns have increased (+6%). At the same time, serviced accommodation trip volumes (+1%) are outperforming non-serviced categories (-4%)

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 July results for the past four years.
- This shows very different trends by trip purpose. The number of holiday trips taken in July 2009 was over 30% higher than in 2008, 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, with the seven month volume and value totals at their lowest level since the current survey began.

4. Overseas Travel by UK Residents

- Travel abroad by British residents continued to decline in 2010, with 2% fewer trips taken in July this year than last, and an 8% reduction in trip volume since January.

UK TOURISM SURVEY - JULY 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	% +/-
July '10									
UK	14.5	13.3	-8%	55.1	52.1	-5%	2,742	2,550	-7%
England	11.6	10.5	-9%	41.8	38.7	-7%	2,128	1,959	-8%
Jan – July'10									
UK	70.5	69.3	-2%	221.8	211.0	-5%	12,475	11,793	-5%
England	57.7	55.7	-4%	175.6	162.0	-8%	9,871	9,149	-7%

Purpose of Trip – July 2010

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	8.6	7.8	-10%	38.2	36.1	-5%	1,890	1,803	-5%
Business	1.6	1.2	-24%	3.9	2.9	-26%	342	275	-20%
VFR	3.9	4.1	5%	12.0	12.7	6%	461	448	-3%
England									
Holiday	6.7	5.8	-14%	28.9	25.7	-11%	1,453	1,336	-8%
Business	1.3	1.0	-24%	3.0	2.2	-27%	279	231	-17%
VFR	3.3	3.5	7%	9.2	10.4	13%	353	369	5%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	34.6	33.1	-4%	126.4	117.8	-7%	7,070	6,831	-3%
Business	10.5	10.0	-4%	25.8	21.7	-16%	2,644	2,293	-13%
VFR	23.7	24.3	2%	64.7	65.8	2%	2,509	2,397	-4%
England									
Holiday	27.1	25.3	-7%	97.0	87.6	-10%	5,458	5,165	-5%
Business	8.8	8.1	-8%	21.0	16.6	-21%	2,140	1,813	-15%
VFR	20.4	20.7	1%	53.5	53.7	0.4%	2,061	1,948	-5%

Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2009	2010	% +/-	2009	2010	% +/-
July 2010	5.8	5.7	-2%	3.3	3.2	-0.4%
Jan – July '10	33.1	30.4	-8%	18.1	17.2	-5%
Aug '09 – July'10	62.3	56.0	-10%	34.0	30.9	-9%

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
July												
UK	12.53	12	14.5	13.3	51.3	45.3	55.1	52.1	2543	2,421	2,742	2,550
England	10.15	9.4	11.6	10.5	39.5	33.2	41.8	38.7	1953	1,837	2,128	1,959
Jan – July												
UK	68.1	67.6	70.5	69.3	213.3	215.6	221.8	211	11744	12,328	12,475	11,793
England	55.3	54.9	57.7	55.7	165.5	169.5	175.6	162	9106	9,666	9,871	9,149

Purpose of Trip – July

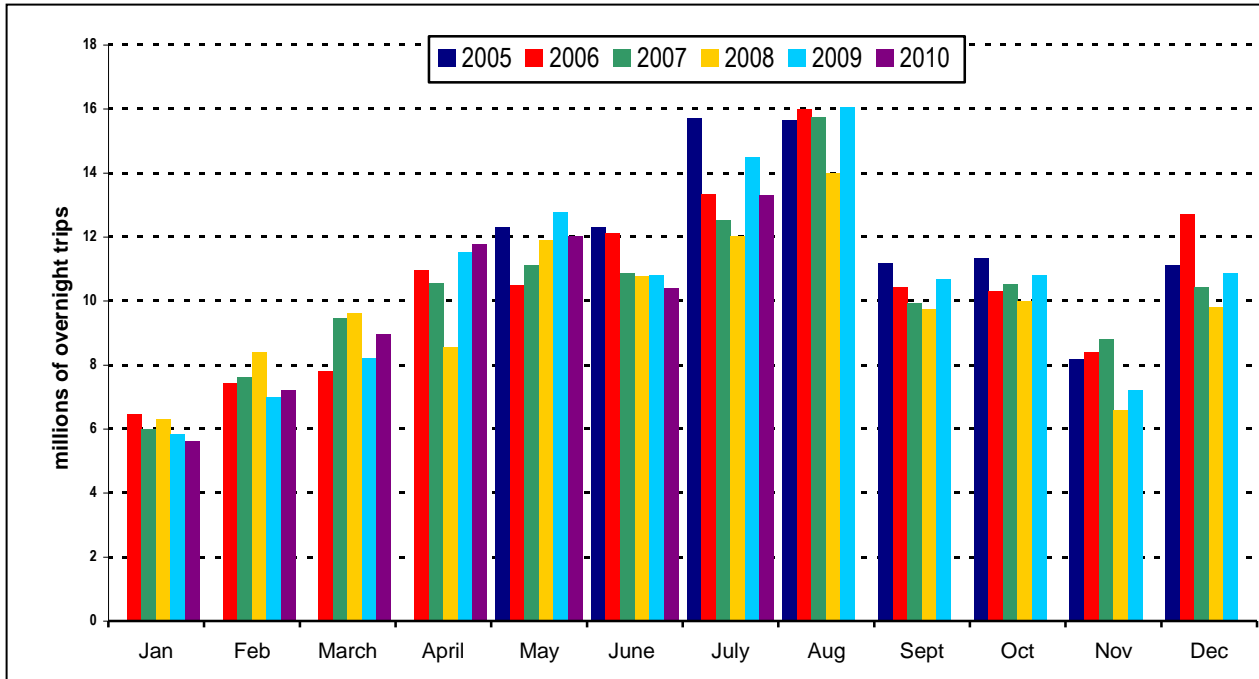
	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
UK												
Holiday	6.8	6.5	8.6	7.8	33.4	30.9	38.2	36.1	1714	1,514	1,890	1,803
Business	1.44	1.7	1.6	1.2	4.1	3.6	3.9	2.9	326	426	342	275
VFR	3.9	3.6	3.9	4.1	12.3	10	12	12.7	449	449	461	448
England												
Holiday	5.2	4.8	6.7	5.8	24.7	21.7	28.9	25.7	1273	1130	1,453	1,336
Business	1.29	1.5	1.3	1.0	3.7	3.0	3.0	2.2	282	349	279	231
VFR	3.3	2.9	3.3	3.5	9.7	7.9	9.2	10.4	347	334	353	369

Purpose of Trip – Year to Date (January – July)

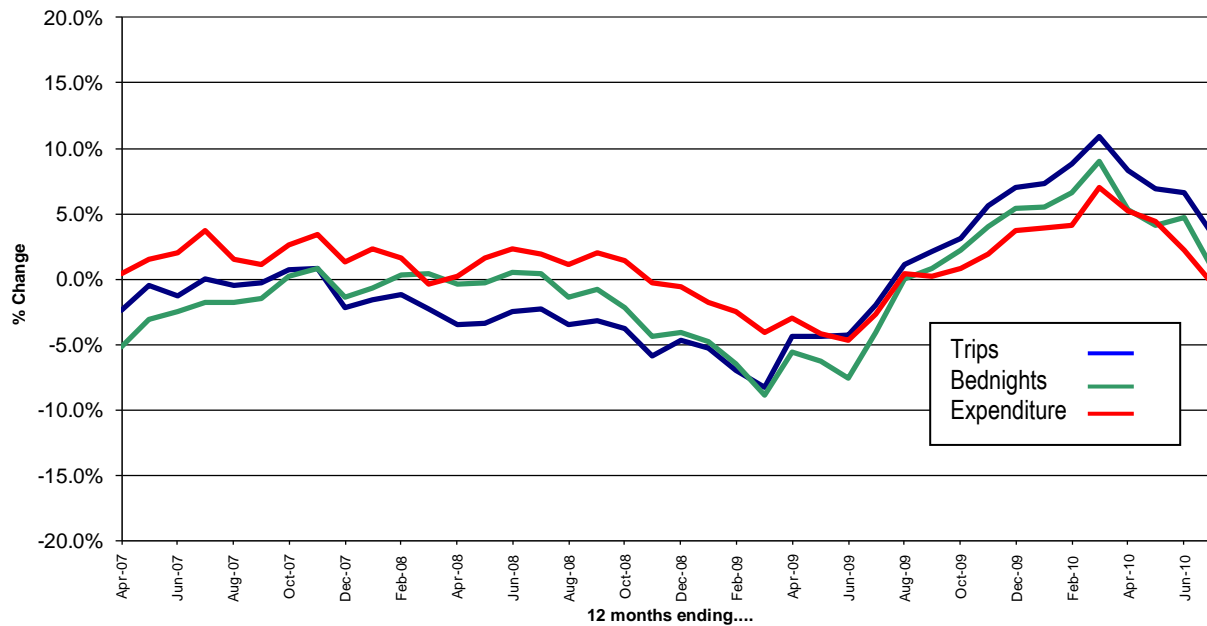
	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
UK												
Holiday	29.7	29.2	34.6	33.1	118.0	108.7	126.4	117.8	6300	6,458	7,070	6,831
Business	11.2	11.5	10.5	10	25.1	26.7	25.8	21.7	2660	2,862	2,644	2,293
VFR	25.4	24.6	23.7	24.3	70.1	71.3	64.7	65.8	2484	2,695	2,509	2,397
England												
Holiday	22.9	22.6	27.1	25.3	81.8	80.5	97	87.6	4704	4,951	5,458	5,165
Business	9.4	9.7	8.8	8.1	20.6	22.2	21	16.6	2141	2,321	2,140	1,813
VFR	21.5	20.6	20.4	20.7	58.3	59.3	53.5	53.7	2032	2,136	2,061	1,948

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 (June 2009 vs July 2010)
- Year to date (January – July 2009 vs January – July 2010)
- 12 months (Aug 2008 – July 2009 vs Aug 2009 – July 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

LEGEND: Above Average Performance Average Performance Below Average Performance

NOTE: In the tables below, 'average performance' refers to the total trips/nights/expenditure to either UK or England in each time period. Those cells marked 'above average performance' indicate where the percentage change is more than 5 percentage points above the average; those marked 'below average performance' 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 cells where changes are further away from the average. The numbers of unweighted trips are also displayed to indicate where sample sizes are relatively small. Where there are 75 or fewer unweighted trips, the % change figures have been greyed out to indicate that they should be treated with caution.

Comparisons with equivalent periods, 2009

	United Kingdom												England												
	Month: July 2010			YTD: January - July 2010			12 month rolling August 2009 - July 2010			Month: July 2010			YTD: January - July 2010			12 month rolling August 2009 - July 2010									
	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure	Trips	Bednights	Expenditure							
TOTAL	-8.0%	-5.5%	-7.0%	2053	-1.7%	-4.9%	-5.5%	10388	3.5%	1.3%	-0.3%	16355	TOTAL	-9.3%	-7.5%	-7.9%	1622	-3.6%	-7.8%	-7.3%	8339	2.5%	-0.2%	-0.5%	14834
PURPOSE:																									
Pure Holiday	-9.7%	-5.5%	-4.6%	1223	-4.4%	-6.8%	-3.4%	5092	3.2%	1.4%	3.1%	9006	Pure Holiday	-13.6%	-10.9%	-8.1%	914	-6.8%	-9.7%	-5.4%	3890	2.1%	0.5%	3.1%	6923
- 1-3 nights holiday	-12.2%	-10.0%	3.0%	600	-3.0%	-5.0%	2.5%	3130	4.2%	4.5%	4.6%	5428	- 1-3 nights holiday	-13.8%	-10.1%	1.2%	461	-4.6%	-12.4%	0.9%	2420	3.6%	4.9%	3.9%	4232
- 4+ nights holiday	-6.7%	-4.1%	-8.4%	623	-6.8%	-10.1%	-9.2%	1962	1.5%	-0.2%	1.7%	3578	- 4+ nights holiday	-13.4%	-11.2%	-12.9%	451	-10.6%	-2.4%	-11.5%	1466	-0.4%	-1.7%	2.3%	2684
VFR (on holiday)	6.4%	-5.2%	8.0%	357	3.7%	0.1%	0.1%	1994	4.5%	4.1%	-0.4%	3669	VFR (on holiday)	11.1%	7.6%	13.1%	301	0.4%	-1.2%	-4.4%	1652	-3.4%	4.0%	-0.6%	3058
HOLIDAY (TOTAL)	-6.4%	-5.4%	-3.0%	1580	-2.3%	-5.2%	-2.8%	7086	3.6%	2.1%	2.5%	12675	HOLIDAY (TOTAL)	-8.5%	-7.8%	-5.3%	1216	-4.8%	-7.6%	-5.2%	5541	2.5%	1.5%	2.4%	9981
VFR (non-holiday)	3.9%	27.0%	-20.6%	295	1.1%	4.1%	-10.4%	1781	3.7%	4.9%	-8.0%	3119	VFR (non-holiday)	1.7%	22.1%	-10.6%	253	2.6%	2.6%	-6.9%	1541	4.0%	3.0%	-8.6%	2747
VFR (TOTAL)	5.3%	5.6%	-2.8%	652	2.5%	1.7%	-4.5%	3755	4.1%	4.4%	-3.7%	6798	VFR (TOTAL)	6.8%	12.8%	4.5%	553	1.4%	0.4%	-5.5%	3194	3.7%	3.6%	-4.2%	5806
Business	-24.3%	-26.0%	-19.6%	149	-4.3%	-15.7%	-13.3%	1253	1.8%	-9.2%	-6.5%	2109	Business	-23.8%	-27.3%	-17.2%	125	-8.1%	-20.8%	-15.3%	1014	-0.1%	-13.0%	-6.5%	1225
RDAS:																									
Adv West Midlands	27.5%	59.1%	25.0%	125	-2.6%	3.8%	-6.0%	667	8.5%	10.6%	9.5%	1175	Adv West Midlands	27.5%	59.1%	25.0%	125	-2.6%	3.8%	-6.0%	667	8.5%	10.6%	9.5%	1175
East of England	-6.4%	6.2%	38.3%	165	-8.1%	-5.7%	9.9%	823	5.1%	2.3%	14.2%	1496	East of England	-6.4%	6.2%	38.3%	165	-8.1%	-5.7%	9.9%	823	5.1%	2.3%	14.2%	1496
East Midlands	-23.6%	-25.4%	-24.2%	121	-0.3%	-0.5%	-4.3%	678	0.3%	-4.3%	-3.8%	1149	East Midlands	-23.6%	-25.4%	-24.2%	121	-0.3%	-0.5%	-4.3%	678	0.3%	-4.3%	-3.8%	1149
London	19.2%	34.0%	10.6%	140	3.8%	2.6%	1.6%	914	1.1%	-0.6%	-0.6%	1521	London	19.2%	34.0%	10.6%	140	3.8%	2.6%	1.6%	914	1.1%	-0.6%	-0.6%	1521
North West	-14.4%	-18.0%	-11.7%	204	-4.1%	-9.0%	-7.0%	1066	-0.2%	-5.1%	-3.8%	1965	North West	-14.4%	-18.0%	-11.7%	204	-4.1%	-9.0%	-7.0%	1066	-0.2%	-5.1%	-3.8%	1965
ONE North East	-13.7%	-17.4%	-10.1%	45	-4.3%	-8.7%	8.7%	292	-9.1%	-8.1%	-8.2%	541	ONE North East	-33.7%	-37.4%	-40.7%	45	-4.3%	-8.7%	8.7%	292	-9.1%	-8.1%	-8.2%	541
South East England	-20.9%	-12.3%	-13.5%	269	-4.2%	-10.0%	-8.9%	1456	4.2%	1.6%	3.5%	2654	South East England	-20.9%	-12.3%	-13.5%	269	-4.2%	-10.0%	-8.9%	1456	4.2%	1.6%	3.5%	2654
South West	-8.3%	-7.2%	-18.3%	397	-8.7%	-11.5%	-17.7%	1679	1.5%	2.0%	-3.9%	3041	South West	-8.3%	-7.2%	-18.3%	397	-8.7%	-11.5%	-17.7%	1679	1.5%	2.0%	-3.9%	3041
Yorkshire Forward	-9.2%	-26.4%	2.0%	176	-4.4%	-16.7%	-13.4%	893	2.8%	-7.1%	-6.1%	1550	Yorkshire Forward	-9.2%	-26.4%	2.0%	176	-4.4%	-16.7%	-13.4%	893	2.8%	-7.1%	-6.1%	1550
LOCATION TYPE:																									
Seaside	-18.4%	-11.3%	-14.9%	576	-9.4%	-13.8%	-13.5%	2302	-0.8%	-5.1%	-4.2%	4084	Seaside	-20.6%	-16.2%	-15.2%	429	-10.9%	-15.9%	-13.6%	1788	-1.6%	-5.6%	-4.3%	3206
Large city/ large town	-12.4%	-5.8%	-8.4%	598	-3.4%	-4.0%	-3.9%	3778	2.9%	0.3%	-2.5%	6764	Large city/ large town	-11.9%	-2.2%	-4.7%	515	-3.2%	-5.4%	-2.4%	3213	2.8%	-0.6%	-0.3%	5734
Small town	2.2%	3.7%	10.0%	486	5.5%	6.2%	4.1%	2515	4.6%	4.4%	6.9%	4352	Small town	-2.6%	-5.0%	-4.1%	371	1.6%	-0.1%	-4.3%	1962	3.4%	2.7%	3.7%	3443
Countryside/ village	-1.5%	-3.5%	-7.1%	435	-2.5%	-4.7%	-8.6%	1980	5.7%	8.1%	2.0%	3554	Countryside/ village	-0.4%	-0.6%	-3.3%	340	-7.0%	-7.5%	-13.8%	1516	2.9%	4.7%	-0.9%	2751
AGE:																									
16-24	3.5%	14.6%	-8.7%	221	2.6%	6.7%	-8.8%	1223	-2.4%	0.5%	-13.3%	2042	16-24	7.1%	25.8%	-4.8%	162	4.8%	11.7%	-9.1%	1026	-3.3%	2.0%	-13.6%	1698
25-34	-14.6%	-33.5%	-20.3%	310	-3.6%	-28.3%	-16.1%	1673	7.4%	-26.4%	-5.8%	2961	25-34	-18.1%	-28.6%	-22.0%	249	-4.3%	-17.4%	-16.1%	1367	8.1%	-2.0%	-5.1%	2434
35-44	-19.3%	-10.3%	-15.3%	475	-4.7%	-5.8%	-2.6%	2301	0.1%	-2.4%	-0.6%	4032	35-44	-24.6%	-16.7%	-16.5%	355	-9.1%	-12.8%	-6.7%	1795	-2.4%	-6.2%	-1.3%	3183
45-54	-3.2%	-10.5%	6.7%	339	3.3%	-1.2%	-2.9%	1818	9.0%	9.8%	5.4%	3244	45-54	0.2%	-7.2%	4.5%	264	0.1%	-3.3%	-5.3%	1406	6.8%	7.6%	3.9%	2535
55+	1.1%	2.7%	1.3%	707	-2.8%	-5.3%	-2.0%	3371	3.5%	1.2%	4.3%	6076	55+	1.3%	2.2%	0.7%	575	-4.4%	-7.9%	-3.3%	2752	3.7%	0.5%	5.0%	4999
SEG:																									
AB	-9.9%	-4.6%	-8.4%	652	1.5%	-3.9%	-3.5%	3405	3.5%	-1.7%	-2.3%	5939	AB	-13.3%	-5.7%	-9.1%	526	-0.9%	-5.9%	-2.5%	2762	1.7%	-3.6%	-0.5%	4833
C1	-4.9%	-9.4%	-2.3%	595	-3.3%	-8.5%	-10.4%	3178	5.0%	3.3%	1.0%	5673	C1	-3.0%	-10.6%	-1.2%	466	-3.7%	-9.7%	-12.9%	2587	3.9%	2.2%	-0.4%	4610
C2	-2.7%	7.9%	1.8%	414	1.6%	5.7%	9.6%	1827	2.7%	3.7%	3.3%	3174	C2	-6.0%	5.5%	-5.6%	316	-3.5%	-3.2%	0.6%	1408	1.4%	1.5%	0.0%	2529
DE	-15.7%	-13.7%	-24.0%	392	-9.7%	-10.6%	-16.8%	1979	1.4%	1.4%	-1.4%	3569	DE	-14.9%	-18.4%	-21.8%	313	-10.3%	-12.5%	-17.7%	1573	2.9%	0.9%	-1.0%	2848
CHILDREN IN HH:																									
Any	-10.7%	-1.7%	-6.7%	749	2.7%	-0.2%	1.5%	3804	5.4%	4.0%	2.3%	6617	Any	-21.1%	-14.9%	-15.3%	538	0.2%	-4.6%	-2.3%	3030	4.0%	2.4%	2.5%	5306
None	-6.6%	-7.7%	-7.1%	1304	-3.7%	-7.0%	-8.1%	6582	2.6%	-0.1%	-1.2%	11738	None	-2.9%	-3.1%	-4.6%	1078	-5.4%	-9.2%	-9.2%	5305	1.8%	-1.4%	-1.6%	8521
ACCOMMODATION:																									
Commercial accom	-8.4%	-6.1%	-5.1%	1286	-0.9%	-4.6%	-4.2%	6110	4.2%	1.6%	0.9%	10472	Commercial accom	-8.8%	-10.4%	-6.3%	1010	-3.2%	-8.6%	-6.4%	4837	3.4%	0.0%	0.6%	8346
- Serviced accom	-5.4%	-9.6%	-7.6%	677	1.2%	-2.2%	-4.1%	4037	4.8%	1.4%	0.0%	6891	- Serviced accom	-3.9%	-6.7%	-5.3%	555	-0.7%	-5.2%	-6.1%	3253	3.9%	0.2%	-0.5%	5589
- Hotel/motel/guesthouse	-4.5%	-10.7%	-6.6%	571	1.5%	-1.6%	-3.6%	3567	5.4%	2.1%	0.3%	6088	- Hotel/motel/guesthouse	-2.2%	-5.1%	-2.0%	469	-0.8%	-5.1%	-5.4%	2875	5.0%	1.5%	0.6%	4965
- Bed & Breakfast	-13.1%	-4.9%	-12.2%	109	-1.7%	-5.4%	-8.5%	484	-0.6%	-2.3%	-2.3%	835	- Bed & Breakfast	-12.1%	-13.6%	-23.4%	89	-1.2%	-5.7%	-11.7%	385	-4.8%	-6.7%	-9.1%	645
Total self-catering rented	-10.7%	-4.1%	-1.5%	584	-3.7%	-4.6%	-1.7%	1911	6.1%	4.8%	5.9%	3298	Total self-catering rented	-13.2%	-12.3%	-6.2%	436	-6.9%	-10.0%	-5.0%	1458	5.4%	3.1%	5.9%	2537
- Camping & Caravanning (inc. owned caravans)	-16.7%	-9.7%	-16.3%	490	-7.6%	-7.9%	-7.9%	1480	0.4%	-1.3%	-1.5%	2545	- Camping & Caravanning (inc. owned caravans)	-21.0%	-21.4%	-31.6%	332	-12.2%	-14.5%	-11.2%	1079	-0.6%	-3.3%	-1.1%	1886
- Other self-catering rented	0.3%	4.0%	13.1%	192	-0.9%	-5.2%	1.0%	732	10.8%	6.7%	10.1%	1293	- Other self-catering rented	-8.4%	-8.5%	16.7%	144	-4.9%	-12.1%	2.8%	553	7.5%	2.9%	15.3%	973
Hostels	-29.6%	-10.5%	13.3%	14	-1.5%	-4.9%	-10.6%	135	-7.7%	-9.9%	-14.1%	219	Hostels	19.0%	48.7%	27.3%	11	13.9%	12.5%	4.2%	102	1.8%	0.6%	-6.8%	160
Own home/friends'/relatives'	-4.0%	0.4%	-8.5%	772	-3.1%	-5.0%	-9.1%	4128	2.6%	0.4%	-3.2%	7655	Own home/friends'/relatives'	-7.7%	1.6%	-8.8%	596	-4.3%	-6.1%	-9.5%	3392	1.6%	-0.3%	-2.9%	6310