

UK TOURISM SURVEY - June 2009

SUMMARY OF RESULTS

1. Headlines

- In the month of June, domestic tourism trips in the UK were virtually unchanged compared to June 2008, while spend rose by 3% (the first monthly increase since September 2008). Nights fell (-4%) due to shorter average trip length.
- Within England, performance was slightly stronger than for the UK as a whole, as trips increased by 2% and spend by 5%, while nights dropped by -2%
- Similarly, between January and June 2009 trip numbers overall have remained fairly stable (+1% in both the UK and in England compared to the same period in 2008).
- In the past 12 months, 118.2 million overnight trips were taken in the UK, 5.4 million fewer than in the 12 months from July 2007 to June 2008, a drop of 4%. Spend has fallen by 5% over the same period.

2. Trip Characteristics

- During the first six months of the year 'pure' holiday trips outperformed the market (+14% in the UK and in England).
- Growth has come from both short breaks (1-3 nights) and longer holidays (4+ nights) (increased by 14% for the two holiday types) during the first half of the year.
- The increase in holiday trips is reflected in the continued above average growth of seaside trips (+16%).
- Business visits and VFR were down by -9% and -6% respectively in the same period.
- Doubtless linked to this, there continues to be a fall in urban travel with small towns (-6%) slightly worse affected than large cities/towns (-3%) while trips to London fell by 8% during the six month period.
- Differences were also apparent by accommodation type with trips using self-catering rented accommodation up by 21% during the first half of the year – included within this camping and caravanning trips increased by 18%.

3. Overseas Travel by UK Residents

- In June, UK residents made 16% fewer trips abroad than in June 2008, and from January – June 2009, trips were down by 17%, continuing the trend seen in previous months.

4. Other Tourism Surveys

- In the month of June, occupancy in UK serviced accommodation was unchanged vs. the previous year, at 49%.
- Inbound travel to the UK increased by 5% in the month of June but fell by 9% in the first six months of the year.
- In the quarterly attractions survey, attractions recorded an increase of 15% through the second quarter of this year (+36% in April, +9% in May and +2% in June).

- KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
June 09									
UK	10.8	10.8	-	35.8	34.3	-4%	2,150	2,220	+3%
England	8.7	8.9	+2%	28.1	27.5	-2%	1,680	1,769	+5%
Jan – June 2009									
UK	55.6	56.1	+1%	169.8	166.4	-2%	9,907	9,731	-2%
England	45.5	46.2	+1%	135.8	133.5	-2%	7,828	7,741	-1%

Purpose of Trip – June 2009

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	5.1	5.5	+8%	19.8	20.7	+4%	1237	1288	+4%
Business	1.8	1.8	-4%	4.5	4.5	-1%	461	519	+13%
VFR	3.5	3.3	-5%	10.3	8.3	-20%	405	372	-8%
England									
Holiday	3.9	4.4	+13%	14.7	15.8	+7%	929	977	+5%
Business	1.6	1.5	-2%	3.8	4.0	+6%	372	463	+24%
VFR	2.9	2.8	-4%	8.6	6.9	-20%	338	292	-14%

Purpose of Trip – Year to Date (January – June 2009)

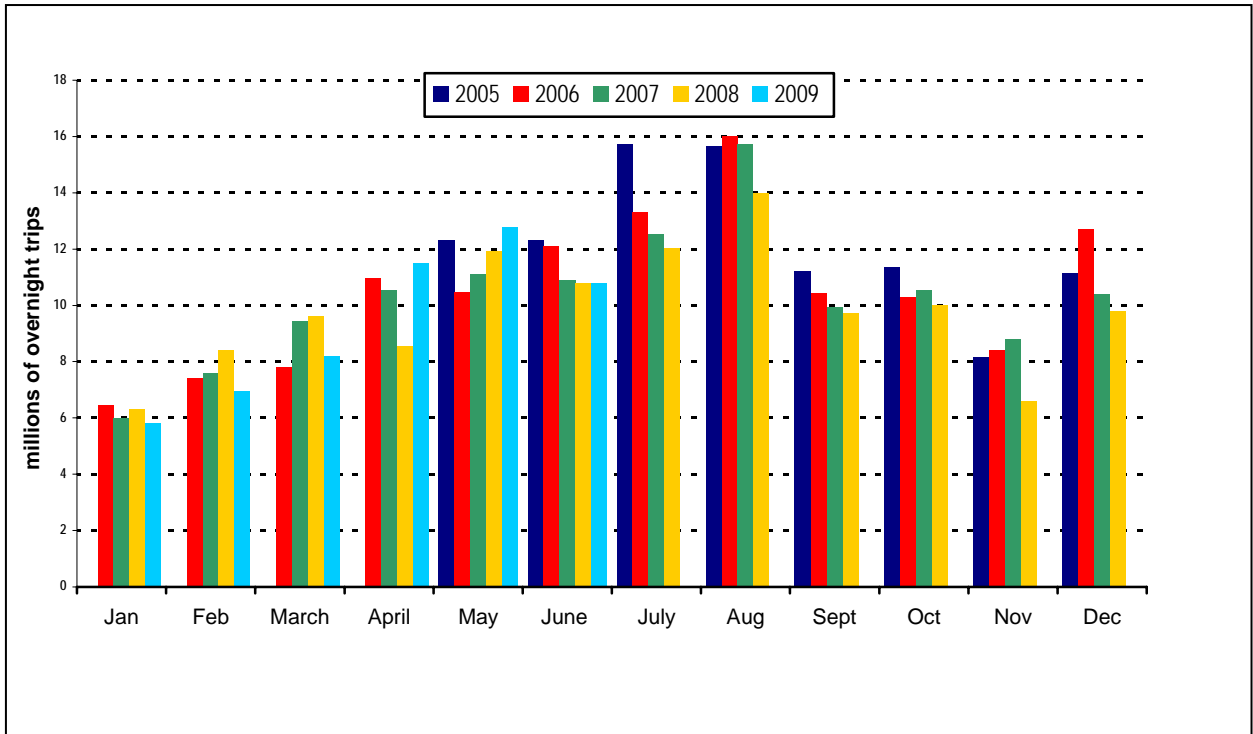
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	22.7	26.0	+14%	77.8	87.9	+13%	4944	5178	+5%
Business	9.8	8.9	-9%	23.1	21.9	-5%	2436	2302	-5%
VFR	21.0	19.8	-6%	61.1	52.6	-14%	2246	2048	-9%
England									
Holiday	17.8	20.4	+14%	58.8	67.9	+16%	3821	4004	+5%
Business	8.2	7.5	-8%	19.2	18.0	-6%	1972	1861	-6%
VFR	17.8	17.1	-4%	51.4	44.3	-14%	1802	1708	-5%

Outbound Travel – UK Residents

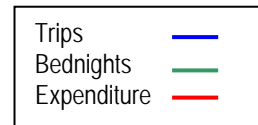
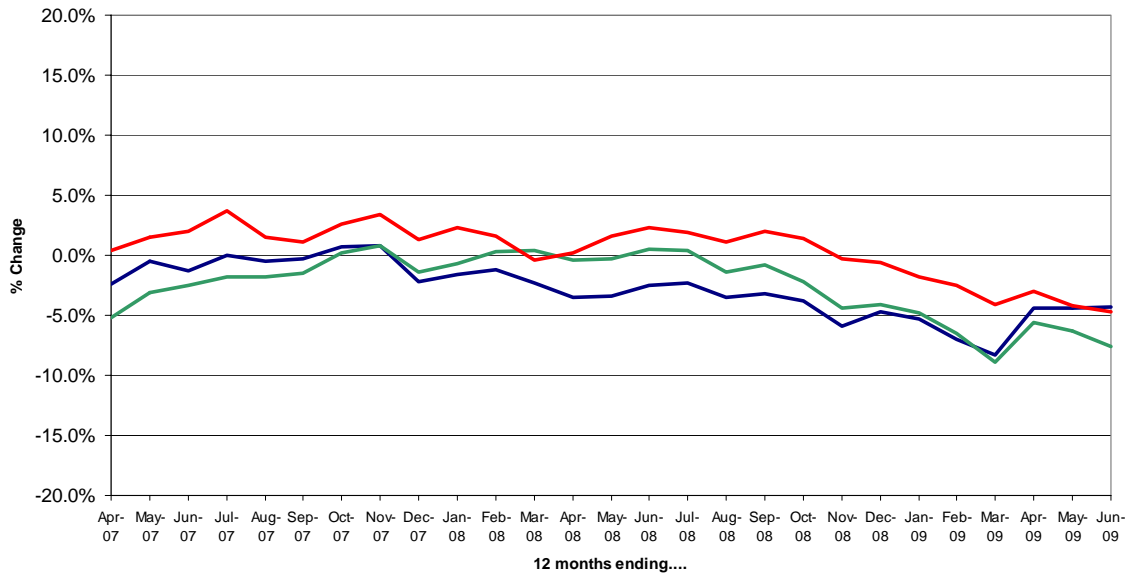
	TRIPS (MILLIONS)			SPEND (£BN)		
	2008	2009	% +/-	2008	2009	% +/-
June 2009	6.9	5.8	-16%	3.6	2.7	-25%
Jan – June 2009	32.9	27.4	-17%	17.1	14.1	-18%
July 08 – June 09	70.9	63.5	-10%	36.4	33.8	-7%

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 (May 2008 vs May 2009)
- Year to date (January - May 2008 vs January - May 09)
- 12 months (June 2007 – May 2008 vs June 2008 – May 2009)

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, 2008

Comparisons with equivalent periods, 2008

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.			

	United Kingdom											
	Month: June 2009			Unweighted Trips	YTD: January - June 2009			Unweighted Trips	12 month rolling July 2008-June 2009			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	0.2%	-4.1%	3.3%	1647	0.8%	-2.0%	-1.8%	8413	-4.3%	-7.7%	-4.7%	17542
PURPOSE:												
Pure Holiday	8.1%	4.2%	4.1%	862	14.3%	13.0%	4.7%	4049	3.0%	-0.4%	-1.7%	8554
- 1-3 nights holiday	8.5%	7.0%	3.0%	478	14.2%	11.8%	1.0%	2571	5.6%	3.9%	1.7%	5068
- 4+ nights holiday	7.6%	3.1%	5.2%	384	14.3%	13.8%	9.6%	1479	-1.2%	-2.4%	-5.0%	3486
VFR (on holiday)	-7.4%	-8.4%	-11.7%	259	-5.5%	-9.1%	-10.4%	1607	-3.1%	-9.5%	-7.3%	3501
HOLIDAY (TOTAL)	4.1%	1.6%	1.8%	1121	7.9%	6.4%	1.7%	5656	1.1%	-2.9%	-2.8%	12055
VFR (non-holiday)	-1.8%	-31.4%	-4.0%	257	-6.3%	-19.5%	-6.8%	1439	-15.9%	-20.1%	-13.3%	2988
VFR (TOTAL)	-4.7%	-19.7%	-8.1%	516	-5.9%	-13.8%	-8.8%	3045	-9.5%	-14.2%	-10.0%	6489
Business	-4.0%	-1.1%	12.6%	231	-8.6%	-5.0%	-5.5%	1112	-7.5%	-11.3%	-4.5%	2120
RDAs:												
Adv West Midlands	29.1%	13.8%	16.2%	116	-3.2%	-20.9%	-11.6%	567	-9.5%	-18.6%	-13.2%	1087
East of England	-14.4%	-9.0%	-15.9%	127	8.1%	2.3%	-9.1%	742	-7.5%	-12.4%	-14.7%	1486
East Midlands	-7.7%	-10.5%	20.4%	96	2.4%	-2.5%	-2.7%	518	-1.5%	2.8%	0.2%	1103
London	-10.1%	-19.5%	-8.2%	130	-7.6%	-19.2%	-5.8%	756	-3.6%	-7.8%	-9.0%	1499
North West	19.6%	3.4%	24.3%	183	3.5%	3.4%	4.0%	850	1.6%	-3.1%	-0.4%	1912
ONE North East	-0.3%	-5.0%	13.8%	53	-1.6%	-3.8%	-10.1%	237	7.7%	-1.3%	7.5%	556
South East England	-11.1%	-17.4%	-17.7%	228	2.6%	3.8%	-0.7%	1231	-4.7%	-6.3%	-0.8%	2481
South West	13.3%	6.8%	9.8%	320	3.3%	4.9%	3.0%	1417	-6.0%	-10.3%	-7.7%	2945
Yorkshire Forward	8.0%	13.2%	15.7%	131	3.9%	2.1%	11.4%	732	-6.6%	-11.7%	2.7%	1424
LOCATION TYPE:												
Seaside	1.7%	3.1%	2.3%	426	16.4%	24.1%	8.2%	1857	-0.6%	-0.4%	-6.3%	4000
Large city/ large town	10.4%	2.4%	3.6%	588	-3.0%	-12.0%	-7.3%	3211	-5.1%	-8.6%	-5.8%	6458
Small town	-13.7%	-10.7%	-5.9%	349	-6.1%	-8.5%	-6.7%	1925	-6.9%	-10.9%	-6.1%	4158
Countryside/ village	-0.7%	-14.1%	13.1%	332	5.0%	-2.8%	9.2%	1638	-3.5%	-11.0%	2.5%	3375
AGE:												
16-24	-1.8%	8.7%	-9.9%	186	-2.7%	-17.8%	-7.4%	983	-10.2%	-19.2%	-9.2%	2095
25-34	12.2%	-20.5%	-5.5%	266	-0.5%	-27.3%	2.5%	1334	-5.7%	-28.9%	-4.4%	2795
35-44	8.8%	5.7%	5.3%	332	6.2%	5.2%	-1.1%	1825	-3.9%	-6.8%	-5.2%	3878
45-54	-1.6%	-8.5%	21.0%	262	-1.1%	-2.5%	-1.4%	1424	-4.1%	-8.9%	-4.8%	2869
55+	-9.2%	-12.8%	0.9%	601	0.3%	-2.3%	-3.0%	2846	-1.1%	-3.5%	-2.5%	5905
SEG:												
AB	5.3%	8.4%	5.8%	528	-0.6%	3.3%	-4.6%	2716	-2.5%	-1.1%	-3.7%	5585
C1	-1.8%	-4.8%	7.6%	535	0.3%	-3.4%	4.3%	2639	-4.7%	-10.2%	-5.0%	5360
C2	-2.4%	-10.8%	0.6%	289	0.1%	-6.8%	-6.8%	1471	-7.7%	-11.6%	-6.6%	3143
DE	-3.5%	-16.7%	-11.6%	294	6.4%	-4.7%	-1.4%	1586	-4.2%	-11.6%	-4.5%	3454
CHILDREN IN H/H:												
Any	13.0%	11.7%	9.5%	511	5.6%	6.9%	-3.0%	2847	-4.8%	-7.1%	-9.7%	6131
None	-4.3%	-9.0%	1.5%	1135	-1.2%	-5.4%	-1.3%	5566	-4.2%	-8.0%	-2.6%	11411
ACCOMMODATION:												
Commercial accom	4.6%	2.8%	4.9%	1028	5.5%	4.3%	0.6%	4814	-1.1%	-5.0%	-3.1%	9884
- Serviced accom	4.4%	-1.7%	-1.7%	658	1.2%	-3.0%	-5.4%	3299	-1.8%	-5.1%	-5.1%	6569
- Hotel/motel/guesthouse	6.7%	-1.0%	-2.3%	568	1.3%	-4.0%	-6.3%	2938	-1.0%	-4.7%	-4.8%	5784
- Bed & Breakfast	-14.4%	-4.7%	2.3%	92	-2.6%	3.2%	2.3%	370	-7.3%	-7.3%	-7.6%	823
Total self-catering rented	13.1%	13.5%	25.1%	353	21.3%	19.6%	21.6%	1353	-0.3%	-4.2%	2.4%	2950
- Camping & Caravanning (inc. owned caravans)	3.6%	2.9%	30.7%	276	17.8%	19.8%	19.2%	1044	4.5%	2.9%	8.5%	2389
- Other self-catering rented	9.4%	11.2%	9.5%	119	20.0%	15.8%	18.5%	554	-4.6%	-9.2%	-2.4%	1131
Hostels	-35.9%	-52.7%	10.5%	14	-8.6%	-24.7%	14.0%	119	8.7%	-4.1%	17.7%	239
Own home/friends/'relatives'	-5.7%	-16.4%	-10.4%	594	-4.6%	-8.9%	-9.6%	3487	-8.8%	-10.7%	-10.5%	7434

	England											
	Month: June 2009			Unweighted Trips	YTD: January - June 2009			Unweighted Trips	12 month rolling July 2008-June 2009			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	2.1%	-2.4%	5.3%	1362	1.4%	-1.7%	-1.1%	6928	-4.3%	-8.5%	-5.1%	14279
PURPOSE:												
Pure Holiday	12.7%	7.2%	5.2%	688	14.2%	15.5%	4.8%	3175	1.9%	-1.5%	-3.6%	6599
- 1-3 nights holiday	20.4%	18.7%	5.9%	400	13.7%	11.3%	-0.9%	2024	5.2%	3.6%	1.3%	3970
- 4+ nights holiday	2.4%	2.5%	4.4%	286	15.2%	18.3%	12.7%	1150	-3.4%	-3.9%	-8.5%	2621
VFR (on holiday)	-2.0%	-3.0%	-10.1%	222	-1.9%	-8.9%	-5.7%	1392	-1.5%	-10.9%	-7.9%	2950
HOLIDAY (TOTAL)	8.7%	5.0%	2.5%	910	8.8%	7.6%	2.6%	4566	0.8%	-4.2%	-4.4%	9551
VFR (non-holiday)	-6.8%	-34.8%	-18.0%	215	-5.8%	-19.5%	-4.6%	1238	-14.8%	-17.8%	-7.6%	2609
VFR (TOTAL)	-4.4%	-19.6%	-13.6%	438	-3.9%	-13.7%	-5.2%	2629	-8.3%	-14.0%	-7.8%	5561
Business	-1.9%	6.2%	24.5%	202	-8.1%	-6.3%	-5.6%	938	-6.7%	-11.4%	-3.6%	1772
RDAs:												
Adv West Midlands	29.1%	13.8%	16.2%	116	-3.2%	-20.9%	-11.6%	567	-9.5%	-18.6%	-13.2%	1087
East of England	-14.4%	-9.0%	-15.9%	127	8.1%	2.3%	-9.1%	742	-7.5%	-12.4%	-14.7%	1486
East Midlands	-7.7%	-10.5%	20.4%	96	2.4%	-2.5%	-2.7%	518	-1.5%	2.8%	0.2%	1103
London	-10.1%	-19.5%	-8.2%	130	-7.6%	-19.2%	-5.8%	756	-3.6%	-7.8%	-9.0%	1499
North West	19.6%	3.4%	24.3%	183	3.5%	3.4%	4.0%	850	1.6%	-3.1%	-0.4%	1912
ONE North East	-0.3%	-5.0%	13.8%	53	-1.6%	-3.8%	-10.1%	237	7.7%	-1.3%	7.5%	556
South East England	-11.1%	-17.4%	-17.7%	228	2.6%	3.8%	-0.7%	1231	-4.7%	-6.3%	-0.8%	2481
South West	13.3%	6.8%	9.8%	320	3.3%	4.9%	3.0%	1417	-6.0%	-10.3%	-7.7%	2945
Yorkshire Forward	8.0%	13.2%	15.7%	131	3.9%	2.1%	11.4%	732	-6.6%	-11.7%	2.7%	1424
LOCATION TYPE:												
Seaside	10.3%	10.7%	12.2%	352	20.7%	30.7%	13.0%	1484	-0.2%	0.5%	-5.1%	3167
Large city/ large town	5.4%	1.3%	-1.6%	492	-3.5%	-13.3%	-8.0%	2725	-4.5%	-9.5%	-5.4%	5453
Small town	-12.8%	-8.7%	-7.2%	278	-5.9%	-8.7%	-6.5%	1564	-7.1%	-13.1%	-7.9%	3310
Countryside/ village	5.2%	-17.2%	21.5%	274	7.0%	-2.6%	10.3%	1327	-4.8%	-12.0%	-0.1%	2687
AGE:												
16-24	-4.6%	6.3%	-11.3%	154	-3.7%	-21.0%	-7.4%	813	-9.1%	-19.5%	-7.7%	1764
25-34	22.5%	15.0%	5.2%	230	1.5%	7.6%	4.3%	1093	-4.7%	-4.5%	-1.5%	2263
35-44	14.9%	12.7%	12.1%	267	7.2%	3.9%	1.5%	1503	-4.7%	-10.7%	-6.2%	3123
45-54	-2.2%	-11.1%	20.9%	217	-0.2%	-1.2%	-0.2%	1151	-4.2%	-10.8%	-4.9%	2308
55+	-9.7%	-13.4%	-1.4%	494	0.3%	-1.3%	-4.3%	2374	-1.4%	-2.9%	-5.1%	4823
SEG:												
AB	10.4%	13.6%	13.7%	439	0.0%	1.9%	-4.5%	2251	-2.1%	-2.4%	-5.0%	4599
C1	-6.6%	-13.6%	-0.2%	438	-0.1%	-2.6%	1.3%	2191	-3.9%	-10.1%	-5.6%	4433
C2	4.9%	-1.3%	9.6%	244	3.1%	-4.9%	-0.8%	1202	-7.9%	-14.1%	-6.0%	2516
DE	0.9%	-6.5%	-7.6%	239	7.0%	-3.7%	3.3%	1274	-6.6%	-11.5%	-2.7%	2691
CHILDREN IN H/H:												
Any	14.4%	13.1%	11.9%	410	6.2%	3.5%	-0.4%	2329	-5.0%	-11.0%	-10.3%	4934
None	-2.2%	-7.1%	3.4%	950	-0.5%	-3.7%	-1.4%	4597	-4.0%	-7.3%	-2.9%	9337
ACCOMMODATION:												
Commercial accom	9.9%	6.2%	10.2%	843	6.8%	7.3%	1.2%	3909	-1.2%	-6.0%	-4.2%	7898
- Serviced accom	8.9%	6.6%	5.2%	546	2.0%	-1.3%	-5.4%	2708	-1.4%	-4.9%	-5.5%	5338
- Hotel/motel/guesthouse	8.5%	5.0%	2.1%	472	2.4%	-2.5%	-6.4%	2427	-0.6%	-4.7%	-5.3%	4720
- Bed & Breakfast	1.5%	14.0%	25.9%	74	-4.2%	6.9%	4.2%	290	-7.8%	-6.0%	-6.7%	647
Total self-catering rented	20.3%	11.7%	26.2%	281	26.7%	28.6%	26.7%	1072	-1.8%	-6.0%	2.5%	2266
- Camping & Caravanning (inc. owned caravans)	25.6%	21.1%	63.3%	226	25.8%	28.1%	8.8%	816	1.1%	-1.5%	0.1%	1771
- Other self-catering rented	-1.3%	-6.7%	-5.4%	90	19.3%	22.2%	16.6%	427	-5.1%	-9.2%	-7.2%	862
Hostels	-32.8%	-55.0%	21.4%	13	-24.9%	-37.6%	5.9%	81	8.4%	-10.9%	27.8%	165
Own home/friends/'relatives'	-6.8%	-15.1%	-19.6%	491	-4.2%	-10.4%	-9.2%	2910	-8.4%	-11.0%	-9.4%	6142