

UK TOURISM SURVEY - June 2010 SUMMARY OF RESULTS

1. Headlines

- In the month of June 2010, the number of domestic overnight tourism trips in the UK dropped by 4% compared to June 2009.
- During the month, the number of bednights fell by 3% while total spend declined by 17%.
- Within England, trips were down by 8% against June 2009 while nights and spend fell by 6% and 20% respectively.
- In the first half of 2010 overall trip numbers were unchanged in the UK compared to the first six months of 2009, while trips in England were down by 2%.
- However, nights fell by 5% in the UK and 8% in England while spend dropped by 5% in the UK and 7% in England during the six month period.
- In the past 12 months, 125.97 million overnight trips were taken in the UK, 7.8 million more than in the 12 months from July 2008 to June 2009, an increase of 8%.

2. Trip Characteristics

- Although overall the number of domestic overnight trips made in the first half of 2010 was unchanged compared with 2009, differences were apparent by trip purpose. The number of “pure holiday” trips fell by 3% in the UK between January and June although it should be noted that they did in fact increase slightly during the month of June (+4%) perhaps reflecting a later half term holiday than in 2009.
- Business trips also fell slightly (-1%) during the first six months of the year while the number of VFR trips rose by 2% in the UK.
- Within England during the first six months of 2010, the number of “pure holiday” trips and business trips each fell by 5% while the number of VFR trips was the same as in 2009.
- In both the UK and England longer 4+ night holiday trips fell by 7% and 9% respectively in the first half of the year.
- There were variations by location type; while trips to small town locations increased (+6%), trips to other location types declined (seaside trips were down by 6%, trips to large cities/towns fell by 2% and countryside trips fell by 3%).
- There were some interesting differences amongst specific demographic groups, trips taken by social grade DEs declined by 8% while trips taken by ABs increased by 5% in the first half of the year.
- The average trip length in the UK has fallen in 2010 from 2.89 to 2.72 nights over the first six months of the year, and this has impacted spend levels.

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.
- In fact, the volume of holiday trips and nights is higher than in the first six months of any of 2006-2008, with holiday trip volumes in 2010 up by 11% (UK) and 9% (England) compared to 2008, and spend levels broadly comparable.
- Business trips and VFR however remain at historically low levels.

4. Overseas Travel by UK Residents

- In June, UK residents made 2% fewer trips abroad than in June 2009 but spent 6% more. In the first six months of the year, trips fell by 10% and spending fell by 5%.

5. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 53% for the month of June (4 percentage points higher than in June '09).
- In the VisitEngland Business Confidence Monitor, when asked about the summer period, 76% of businesses said that visitor numbers had either increased (38%) or stayed the same (38%) compared to the summer period in 2009.
- The England Attractions Monitor indicated an 11% increase in trips to visitor attractions compared to June 2009.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
June '10									
UK	10.8	10.4	-4%	34.3	33.1	-3%	2,220	1,840	-17%
England	8.9	8.2	-8%	27.5	25.9	-6%	1,769	1,416	-20%
Jan – June'10									
UK	56.1	56.0	0%	166.4	158.5	-5%	9,731	9,243	-5%
England	46.2	45.1	-2%	133.5	122.9	-8%	7,741	7,190	-7%

Purpose of Trip – June 2010

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	5.5	5.8	5%	20.7	21.1	2%	1,288	1,209	-6%
Business	1.8	1.3	-25%	4.5	2.8	-37%	519	270	-48%
VFR	3.3	2.9	-12%	8.3	8.1	-2%	372	330	-11%
England									
Holiday	4.4	4.3	0%	15.8	15.8	0%	977	909	-7%
Business	1.5	1.1	-32%	4.0	2.0	-49%	463	205	-56%
VFR	2.8	2.5	-11%	6.9	7.1	-2%	292	273	-7%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	26.0	25.3	-3%	87.9	81.3	-7%	5,178	5,028	-3%
Business	8.9	8.8	-1%	21.9	18.9	-14%	2,302	2,018	-12%
VFR	19.8	20.2	2%	52.6	53.1	1%	2,048	1,949	-5%
England									
Holiday	20.4	19.4	-5%	67.9	61.6	-9%	4,004	3,829	-4%
Business	7.5	7.1	-5%	18.0	14.4	-20%	1,861	1,582	-15%
VFR	17.1	17.1	0%	44.3	43.4	-2%	1,708	1,579	-8%

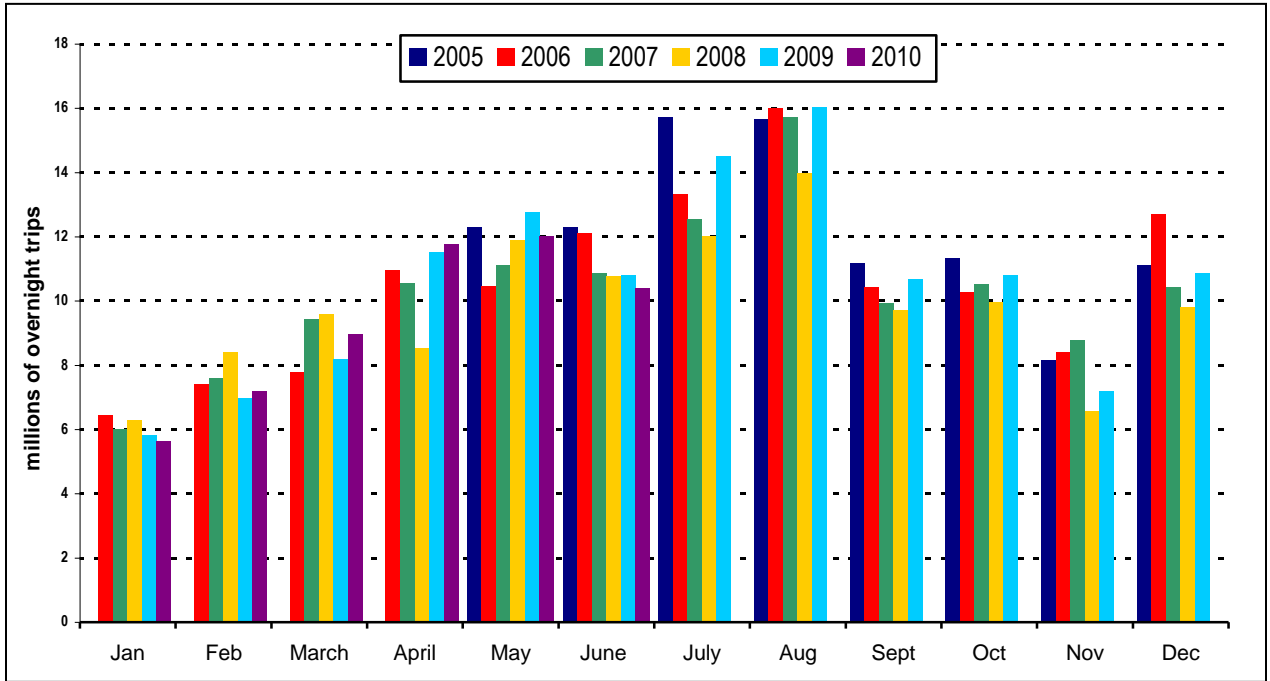
Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2009	2010	% +/-	2009	2010	% +/-
June 2010	5.7	5.6	-2%	2.9	3.1	6%
Jan – June '10	27.2	24.6	-10%	14.8	14.1	-5%
July '09 – June'10	63.3	56.0	-12%	34.5	31.0	-10%

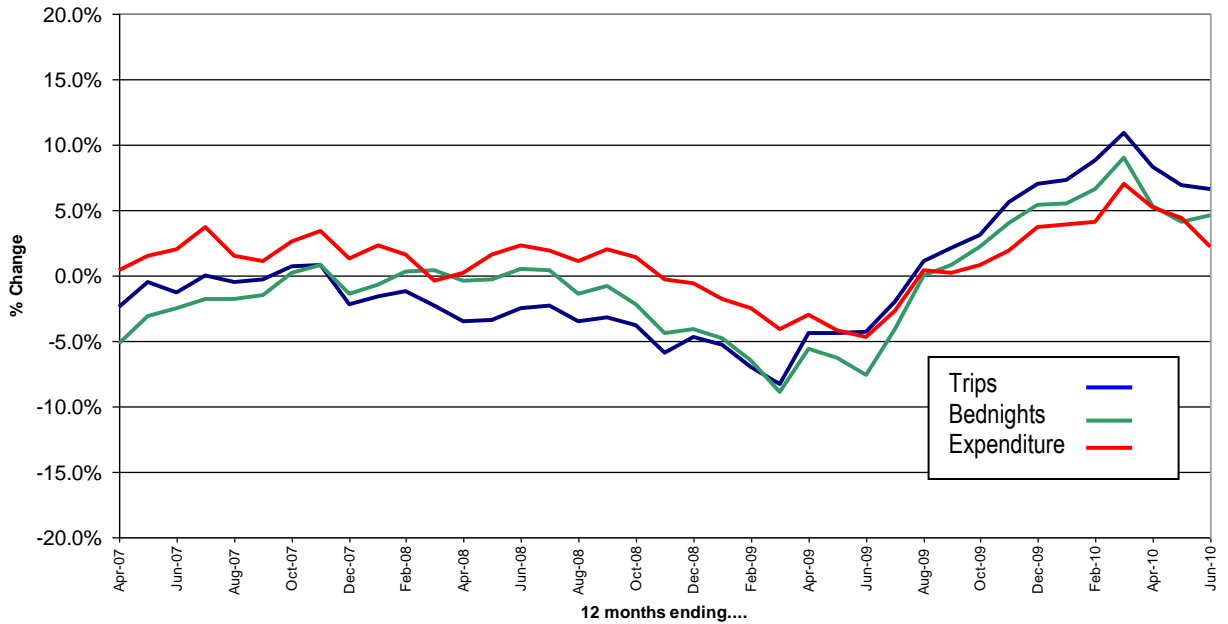
TREND CHARTS



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

Comparisons with equivalent periods, 2009

LEGEND: Above Average Performance (Green), Average Performance (Yellow), Below Average Performance (Red)

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				United Kingdom				England				England												
	Month: June 2010			Unweighted Trips	YTD: January - June 2010			Unweighted Trips	12 month rolling July 2009 - June 2010			Unweighted Trips	Month: June 2010			Unweighted Trips	YTD: January - June 2010			Unweighted Trips	12 month rolling July 2009 - June 2010			Unweighted Trips	
Trips	Bednights	Expenditure	Trips		Bednights	Expenditure	Trips		Bednights	Expenditure	Trips		Bednights	Expenditure	Trips		Bednights	Expenditure	Trips		Bednights	Expenditure	Trips		Bednights
TOTAL	-3.6%	-3.4%	-17.1%	1582	-0.1%	-4.7%	-5.0%	8332	6.6%	4.7%	2.2%	18480	-8.1%	-5.8%	-20.0%	1247	-2.2%	-8.0%	-7.1%	6715	6.0%	3.5%	2.3%	14954	
PURPOSE:																									
Pure Holiday	5.5%	2.0%	-6.1%	902	-2.7%	-7.5%	-2.9%	3868	8.6%	6.3%	7.2%	9102	-0.5%	0.4%	-7.0%	679	-4.6%	-9.3%	-4.4%	2974	8.9%	7.3%	8.2%	7038	
- 1-3 nights holiday	10.5%	10.9%	0.7%	522	-0.5%	-3.1%	2.5%	2530	9.9%	9.7%	6.2%	5495	-1.6%	-0.7%	-3.7%	389	-2.2%	-10.5%	0.8%	1959	9.6%	10.3%	5.1%	4293	
- 4+ nights holiday	-1.5%	-1.7%	-11.2%	381	-6.9%	-12.9%	-9.5%	1338	6.5%	4.6%	8.4%	3607	1.3%	0.9%	-9.4%	292	-9.3%	-12.1%	-10.8%	1014	7.6%	5.8%	11.7%	2740	
VFR (on holiday)	-3.4%	-0.9%	-10.8%	252	3.1%	1.5%	-1.9%	1637	4.8%	8.2%	-0.7%	3659	-6.5%	0.6%	-17.2%	209	-1.8%	-3.2%	-8.5%	1351	3.3%	6.3%	-0.7%	3037	
HOLIDAY (TOTAL)	3.4%	1.4%	-6.8%	1154	-1.1%	-5.2%	-2.7%	5505	7.5%	6.8%	5.8%	12760	-1.9%	0.4%	-8.4%	888	-3.7%	-7.7%	-5.2%	4324	7.1%	7.0%	6.6%	10074	
VFR (non-holiday)	-21.1%	-3.6%	-12.0%	207	0.6%	-0.1%	-8.4%	1466	4.3%	2.5%	-6.3%	3089	-15.7%	4.8%	8.1%	185	2.8%	-0.9%	-6.5%	1288	5.4%	1.0%	-8.3%	2726	
VFR (TOTAL)	-12.3%	-2.0%	-11.3%	459	1.9%	0.9%	-4.8%	3103	4.6%	5.8%	-3.1%	6748	-11.1%	2.4%	-6.5%	395	0.4%	-2.2%	-7.6%	2640	4.3%	4.1%	-4.1%	5766	
Business	-25.1%	-37.1%	-48.0%	165	-0.8%	-13.9%	-12.3%	1104	3.0%	-6.2%	-6.8%	2159	-31.6%	-49.2%	-55.7%	132	-5.4%	-19.8%	-15.0%	888	0.8%	-10.7%	-7.0%	1766	
RDAs:																									
Adv West Midlands	-22.4%	-21.7%	-20.9%	94	-8.0%	-11.2%	-12.1%	541	6.5%	4.1%	6.7%	1154	-22.4%	-21.7%	-20.9%	94	-8.0%	-11.2%	-12.1%	541	6.5%	4.1%	6.7%	1154	
East of England	16.6%	-1.9%	23.3%	136	-8.5%	-9.2%	2.7%	658	6.4%	0.9%	9.0%	1506	16.6%	-1.9%	23.3%	136	-8.5%	-9.2%	2.7%	658	6.4%	0.9%	9.0%	1506	
East Midlands	11.2%	10.8%	-4.2%	107	6.5%	8.4%	0.8%	557	8.6%	4.7%	0.8%	1179	11.2%	10.8%	-4.2%	107	6.5%	8.4%	0.8%	557	8.6%	4.7%	0.8%	1179	
London	-18.7%	-15.5%	-17.8%	103	1.3%	-2.6%	0.3%	774	0.0%	-4.6%	-2.2%	1510	-18.7%	-15.5%	-17.8%	103	1.3%	-2.6%	0.3%	774	0.0%	-4.6%	-2.2%	1510	
North West	-19.7%	-8.6%	-36.8%	154	-1.4%	-4.7%	-5.7%	863	3.6%	-0.1%	-1.0%	1986	-19.7%	-8.6%	-36.8%	154	-1.4%	-4.7%	-5.7%	863	3.6%	-0.1%	-1.0%	1986	
ONE North East	3.9%	3.3%	-47.3%	36	2.9%	0.6%	25.3%	247	-4.1%	-2.9%	-1.6%	551	-38.9%	-39.3%	-47.3%	36	2.9%	0.6%	25.3%	247	-4.1%	-2.9%	-1.6%	551	
South East England	4.7%	1.7%	-1.4%	229	0.3%	-9.3%	-7.7%	1187	10.9%	6.4%	7.2%	2711	4.7%	1.7%	-1.4%	229	0.3%	-9.3%	-7.7%	1187	10.9%	6.4%	7.2%	2711	
South West	-12.9%	-0.3%	-30.7%	288	-8.8%	-13.1%	-17.5%	1282	5.3%	7.1%	3.7%	3066	-12.9%	-0.3%	-30.7%	288	-8.8%	-13.1%	-17.5%	1282	5.3%	7.1%	3.7%	3066	
Yorkshire Forward	-4.9%	-15.4%	-8.3%	122	-3.2%	-13.3%	-17.6%	717	7.4%	3.8%	-4.2%	1562	-4.9%	-15.4%	-8.3%	122	-3.2%	-13.3%	-17.6%	717	7.4%	3.8%	-4.2%	1562	
LOCATION TYPE:																									
Seaside	-1.7%	-3.9%	-18.8%	413	-6.0%	-15.0%	-13.0%	1726	7.1%	2.1%	4.8%	4175	-8.3%	-6.8%	-19.9%	318	-7.4%	-15.8%	-13.0%	1389	6.5%	1.9%	4.3%	3286	
Large city/ large town	-19.1%	-15.9%	-24.4%	487	-1.5%	-3.5%	-3.0%	3178	6.2%	0.8%	-1.7%	6851	-16.8%	-13.3%	-19.5%	419	-1.4%	-6.1%	-1.9%	2698	6.5%	-0.1%	0.4%	5805	
Small town	18.1%	11.4%	14.2%	398	6.3%	5.9%	2.5%	2028	5.6%	6.5%	6.1%	4334	17.4%	8.1%	5.7%	316	2.5%	0.0%	-4.4%	1590	5.5%	6.7%	6.1%	3445	
Countryside/ village	-4.2%	-0.8%	-31.0%	311	-2.8%	-4.3%	-9.1%	1546	6.7%	12.1%	3.3%	3548	-18.9%	-7.8%	-42.6%	218	-8.6%	-8.7%	-16.6%	1177	3.6%	7.9%	-0.8%	2743	
AGE:																									
16-24	-15.4%	-17.5%	-34.8%	169	2.3%	2.7%	-8.7%	1001	-2.6%	-3.4%	-12.2%	2028	-13.4%	-13.5%	-36.7%	144	4.2%	5.9%	-10.1%	843	-4.2%	-3.7%	-14.8%	1680	
25-34	-6.0%	-36.7%	-19.1%	260	-0.7%	-28.0%	-15.0%	1363	11.0%	-26.4%	-1.1%	2995	-11.8%	-11.7%	-24.8%	210	-0.5%	-14.0%	-14.5%	1118	13.2%	5.3%	-0.7%	2473	
35-44	3.6%	4.5%	-10.9%	349	-0.2%	-3.9%	1.7%	1826	7.4%	6.1%	5.6%	4120	1.8%	-2.3%	-9.1%	276	-4.4%	-11.3%	-3.4%	1440	6.0%	3.3%	6.8%	3277	
45-54	11.0%	16.3%	-18.6%	278	4.8%	2.1%	-5.1%	1478	11.8%	15.4%	4.0%	3275	1.9%	16.8%	-21.2%	212	0.1%	-2.1%	-7.4%	1141	8.1%	10.3%	2.3%	2550	
55+	-10.5%	-8.2%	-13.7%	527	-3.7%	-7.1%	-2.9%	2663	4.6%	2.3%	5.4%	6061	-16.4%	-11.1%	-17.8%	405	-5.7%	-10.1%	-4.4%	2176	5.4%	2.3%	7.3%	4987	
SEG:																									
AB	0.2%	-6.7%	-22.5%	514	4.5%	-3.6%	-2.2%	2753	7.6%	0.5%	0.2%	6021	-6.6%	-11.1%	-22.0%	398	2.4%	-6.0%	-0.6%	2235	6.8%	-1.6%	3.0%	4921	
C1	-1.7%	-7.1%	-23.9%	496	-2.9%	-8.2%	-12.5%	2580	6.1%	7.8%	3.1%	5726	-3.6%	-5.8%	-29.0%	398	-3.9%	-9.5%	-15.7%	2121	4.0%	6.7%	0.9%	4643	
C2	-11.4%	-2.5%	-1.2%	263	2.8%	3.5%	12.1%	1412	7.3%	5.4%	5.9%	3166	-18.1%	-9.9%	-11.6%	205	-2.9%	-7.7%	2.5%	1090	7.2%	4.3%	4.1%	2532	
DE	-7.3%	10.2%	1.6%	308	-8.1%	-8.6%	-14.4%	1587	4.6%	7.0%	1.5%	3566	-9.5%	9.3%	1.9%	245	-9.1%	-9.5%	-16.4%	1261	6.9%	7.5%	1.4%	2840	
CHILDREN IN H/H:																									
Any	4.6%	9.1%	-0.4%	563	6.6%	0.3%	4.1%	3055	9.9%	7.9%	6.3%	6666	5.4%	11.0%	-5.7%	455	6.3%	-0.5%	1.8%	2492	10.9%	9.2%	9.0%	5414	
None	-7.0%	-8.1%	-22.2%	1019	-3.0%	-6.9%	-8.3%	5278	5.1%	3.1%	0.6%	11813	-13.5%	-12.0%	-24.4%	794	-6.0%	-11.1%	-10.4%	4228	3.8%	0.9%	-0.2%	9542	
ACCOMMODATION:																									
Commercial accom	1.2%	-2.3%	-19.6%	1038	1.2%	-4.0%	-4.0%	4827	8.1%	5.8%	3.3%	10557	-6.2%	-6.4%	-24.2%	792	-1.7%	-7.9%	-6.5%	3829	7.5%	5.0%	3.2%	8422	
- Serviced accom	-6.7%	-13.4%	-23.2%	612	2.6%	-0.3%	-3.4%	3355	6.5%	4.4%	1.2%	6910	-11.4%	-19.8%	-27.4%	485	-0.1%	-4.8%	-6.3%	2696	5.7%	3.1%	0.4%	5599	
- Hotel/motel/guesthouse	-6.2%	-11.1%	-21.3%	530	2.7%	0.5%	-2.9%	2991	6.7%	5.1%	1.0%	6098	-9.5%	-17.3%	-23.8%	427	-0.5%	-5.1%	-6.1%	2404	6.0%	3.6%	0.5%	4965	
- Bed & Breakfast	-7.3%	-23.0%	-33.7%	85	2.1%	-5.5%	-7.5%	375	4.3%	0.2%	2.6%	848	-21.1%	-31.2%	-47.3%	59	2.6%	-3.2%	-7.8%	296	2.1%	0.2%	-0.5%	655	
Total self-catering rented	8.1%	7.3%	-13.4%	380	-0.5%	-4.8%	-1.9%	1335	15.2%	11.8%	11.5%	3356	0.1%	8.4%	-17.9%	282	-4.0%	-8.7%	-4.4%	1025	15.4%	12.4%	12.8%	2595	
- Camping & Caravanning (inc. owned caravans)	11.4%	15.0%	-15.1%	307	-2.6%	-5.8%	-8.7%	1007	11.4%	6.6%	6.6%	2630	-8.0%	2.1%	-32.2%	208	-7.7%	-9.2%	-11.4%	750	11.9%	9.3%	-0.3%	1967	
- Other self-catering rented	2.8%	-6.6%	-13.4%	122	-1.4%	-9.0%	-4.3%	542	15.4%	11.7%	13.0%	1289	12.8%	8.8%	-4.4%	102	-3.7%	-13.7%	-3.2%	409	15.1%	10.8%	17.0%	984	
Hostels	175.3%	160.8%	9.5%	39	2.9%	-4.2%	-12.9%	121	-5.1%	-9.8%	-15.4%	224	70.2%	99.5%	-11.8%	22	13.4%	8.9%	1.9%	91	-3.3%	-4.5%	-8.2%	158	
Own home/friends'/relatives'	-12.2%	-6.1%	-9.4%	519	-3.0%	-6.6%	-9.3%	3353	4.4%	2.2%	-1.0%	7668	-10.9%	-3.7%	-1.1%	438	-3.6%	-8.1%	-9.7%	2793	4.1%	1.3%	-0.2%	6345	

	United Kingdom				United Kingdom				England				England									
	Month: June 2010			Unweighted Trips	YTD: January - June 2010			Unweighted Trips	12 month rolling July 2009 - June 2010			Unweighted Trips	Month: June 2010			Unweighted Trips	YTD: January - June 2010			Unweighted Trips	12 month rolling July 2009 - June 2010	