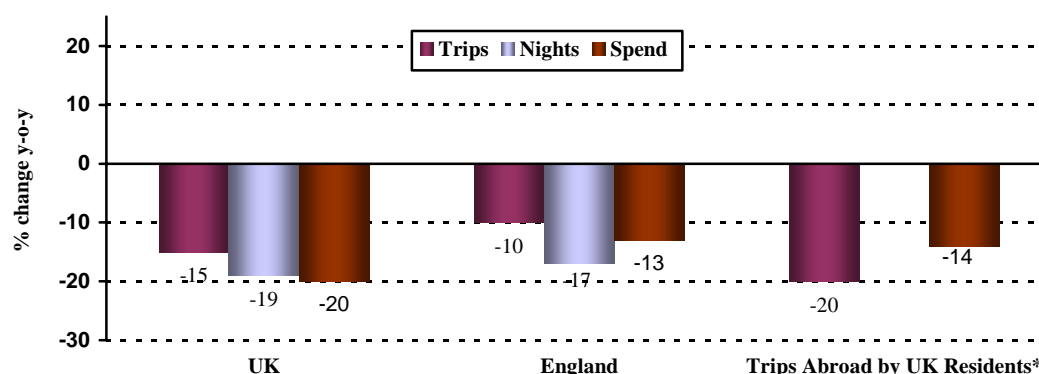


United Kingdom Tourism Survey – March 2009 Update

(1) Overview of March 2009 year-on-year changes



Source: UKTS, *International Passenger Survey

(2) March 2009

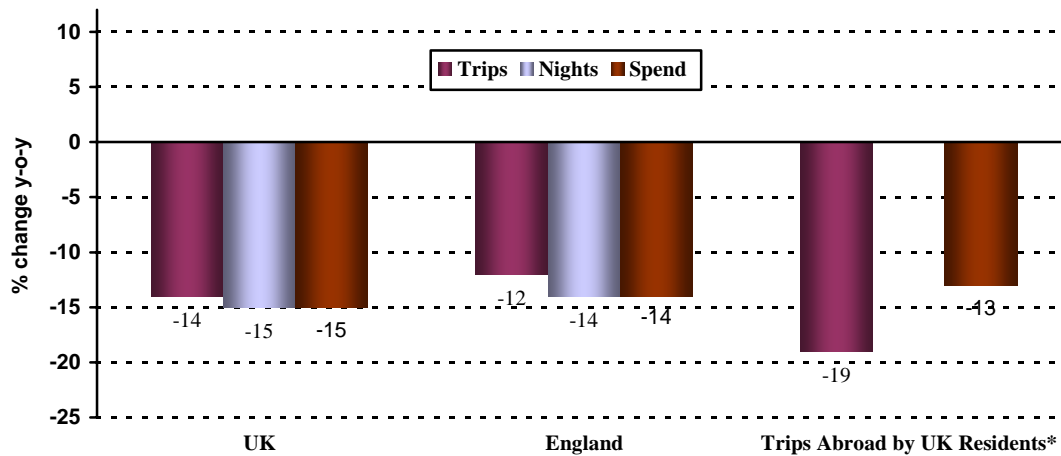
In March, domestic overnight trips fell sharply compared with the same period in 2008. However, it is important to note that in 2008 Easter fell in March while in 2009 it was in April so results are not directly comparable.

There were 8.2m overnight trips made in the UK by UK residents in March 2009, a fall of -15% from March 2008 – equivalent to 1.4m fewer trips. The number of bed nights fell by -19% to 22.5m during the month reflecting the fall in the number of trips and reduced trip length. The value of overnight trips fell by -20% during March - domestic overnight trips were worth £1.3bn compared with £1.5bn in March 2008. Average spend per trip fell by £10 to £159 (please note this does not take into account inflation although this was around 0% at the time). Trips declined across all sectors but most significantly across VFR travel (trips down -14% and nights down -28%). Fewer trips for holiday purposes were also taken (trips dropped by -13% and nights -15%) while business travel also decreased (trips down -10%, nights -6%).

In England trips fell by -10% to 6.9m and nights by -17% to 18.5m in March 2009 – less than the UK average - compared to the same period in 2008. Consequently, average spend per night increased by £3 to £58 but due to shorter trip length, 2.7 nights down from 2.9 nights, average spend per trip dropped by £6 to £153.

	Trips (millions)	Nights (millions)	Spend (£ millions)	Average length of stay (nights)	Average spend per night (£s)	Average spend per trip (£s)
United Kingdom						
Total	8.2	22.5	1,304	2.7	58	159
Holiday	3.3	10.1	646	3.1	64	196
VFR	3.2	8.2	302	2.6	37	95
Business	1.5	3.6	329	2.4	92	224
England						
Total	6.9	18.5	1,065	2.7	58	153
Holiday	2.7	7.8	523	2.9	67	196
VFR	2.9	7.1	262	2.5	37	92
Business	1.2	3.0	259	2.5	87	215

(3) Overview of Jan-March 2009 year-on-year changes % year-on-year change



Source: UKTS, *International Passenger Survey

(4) Jan-Mar '09

21.0m overnight trips were made in the UK by UK residents between Jan and March '09, down -14% on the same period the year before, while bed nights fell by -15% with 55.0m bed nights recorded. Expenditure decreased by -15% to around £3.4bn compared to January – March '08. Although there were declines across all trip types, holiday travel (-7%) was less affected than business (-16%) or VFR (-16%).

Within England, trips declined by -12% and spend fell by -14%, again, a slightly lower rate of decline than the UK average.

Trips taken Jan-Mar '09	Trips (Millions)			Bed nights (millions)			Expenditure (£ million)		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
United Kingdom									
Total	24.3	21.0	-13.6	64.9	55.0	-15.3	3,950	3,378	-14.5
Holiday	8.2	7.6	-7.3	23.6	21.8	-7.9	1,679	1,429	-14.9
VFR	10.4	8.7	-16.0	28.1	21.8	-22.1	1,009	820	-18.7
Business	4.8	4.1	-15.6	10.7	9.9	-8.3	1,151	1,059	-8.0
England									
Total	19.9	17.6	-11.6	52.6	45.2	-14.2	3,125	2,699	-13.6
Holiday	6.5	6.0	-7.5	18.5	17.1	-7.5	1,310	1,119	-14.6
VFR	8.7	7.6	-11.8	23.5	18.9	-19.5	786	707	-10.1
Business	3.9	3.5	-9.8	8.6	7.9	-8.6	936	812	-13.2

* all expenditure figures are in historic prices

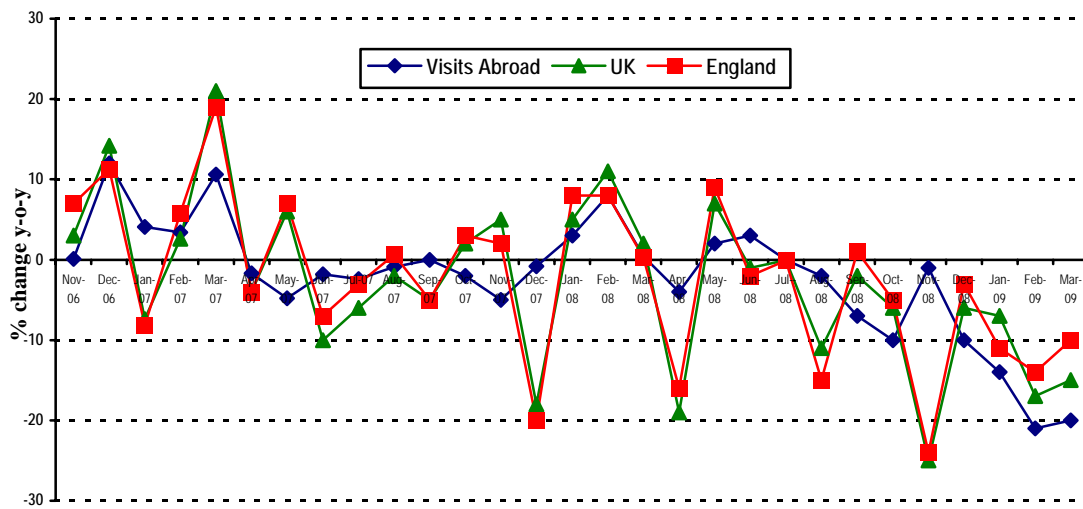
(5) Trips Abroad by UK Residents in March 2009

UK residents made 4.1m trips abroad in March 2009, representing a year-on-year decrease of -20%. Spend on overseas trips fell by -14% during the month to £2.3bn.

	Trips '08	Trips '09	Difference	Exp '08	Exp '09	Difference
Mar 2009	5.1m	4.1m	-20%	£2.7bn	£2.3bn	-14%
Jan-Mar 2009	14.3m	11.6m	-19%	£7.8bn	£6.8bn	-13%

Source: International Passenger Survey

(6) UK Resident Trips Abroad vs. UK and England Domestic Trips November 2006-March 2009



Source: UKTS, International Passenger Survey

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

