

### UK TOURISM SURVEY - March 2010 SUMMARY OF RESULTS

#### 1. Headlines

- During the month of March, domestic tourism trips in the UK grew by 9% compared to the same month in 2009.
- The total number of bednights increased by 8%, while total expenditure rose by 20%.
- Within England, the number of trips was up 7% against March 2009 while nights and spend also increased by 6% and 17% respectively.
- In the first three months of 2010 overall trip numbers were up 4% in the UK compared to January-March 2009, while trips in England were up 2% in the same period.
- In the past 12 months, 126.8 million overnight trips were taken in the UK, 12.4 million more than in the 12 months from April 2008 to March 2009, an increase of 11%.

### 2. Trip Characteristics

- Although trips overall increased by 4% during the first quarter of 2010 there were variations by trip purpose.
- The number of "pure holiday" trips was unchanged compared to the first three months of 2009 and while "pure holiday" bednights fell by 6%, expenditure actually increased by 3% due to a higher average spend per night.
- Business trips rose by 8% in the UK and 3% in England in the first quarter of 2010
  Business expenditure was down fractionally in the UK as a whole (-1%) but up marginally in England (1%).
- Meanwhile visits to friends and family were up by 5% in the UK and 3% in England in the first three months of the year.
- Perhaps driven by the increase in business trips compared to January-March 2009, trips to urban locations increased (trips to a large city/large town were up by 6% and trips to a small town rose by 9%). However, trips to seaside and countryside locations fell slightly (down 4%).
- In terms of demographics, the most significant changes were that trips in households where there are children were up by 15% while trips amongst younger age groups also increased (+7% amongst 16-24s and 12% among 25-34s).

### 3. Overseas Travel by UK Residents

- In March, UK residents made 8% fewer trips abroad than in March 2009 and spent 4% less. In the first quarter of the year, trips and spend were both down by 9%.

### 4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 36% for the month of March (unchanged compared with March '09).
- The England Attractions Monitor showed that in the month of March visits to visitor attractions rose by 3% compared with March '09.

### **KEY MEASURES**



# Year on Year Comparison – All Trips

	TRIF	S (MILLIO	NS)	NIG	HTS (MILL	IONS)	SPEND (£M)			
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-	
March '10										
UK	8.2	9.0	9%	22.5	24.2	8%	£1,304	£1,569	20%	
England	6.9	7.4	7%	18.5	19.7	6%	£1,065	£1,241	17%	
Jan – March'10										
UK	21.0	21.8	4%	55.0	55.4	1%	£3,378	£3,463	3%	
England	17.6	17.9	2%	45.2	43.6	-3%	£2,699	£2,702	0%	

## Purpose of Trip – March 2010

	TRIP	S (MILLIO	NS)	NIGH	TS (MILLI	ONS)	SPEND (£M)			
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-	
UK										
Holiday	3.3	3.4	2%	10.1	9.9	-2%	£646	£664	3%	
Business	1.4	2.0	41%	3.5	4.6	29%	£325	£538	66%	
VFR	3.2	3.3	3%	8.2	8.9	10%	£302	£322	7%	
England										
Holiday	2.7	2.7	2%	7.8	8.1	4%	£523	£525	0%	
Business	1.2	1.6	34%	3.0	3.3	11%	£257	£415	61%	
VFR	2.9	2.8	0%	7.1	7.6	7%	£262	£263	0%	

# Purpose of Trip – Year to Date (January – March 2010)

	TRIF	PS (MILLIO	NS)	NIGH	TS (MILLI	ONS)	SPEND (£M)			
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-	
UK										
Holiday	7.6	7.5	0%	21.8	20.4	-6%	£1,429	£1,476	3%	
Business	4.1	4.4	8%	9.5	9.3	9%	£1,020	£1,006	-1%	
VFR	8.7	9.1	5%	21.8	23.5	7%	£820	£840	2%	
England										
Holiday	6.0	5.8	-2%	17.1	15.8	-7%	£1,119	£1,124	0%	
Business	3.4	3.5	3%	7.7	7.2	-7%	£790	£800	1%	
VFR	7.6	7.9	3%	18.9	19.2	1%	£707	£674	-5%	

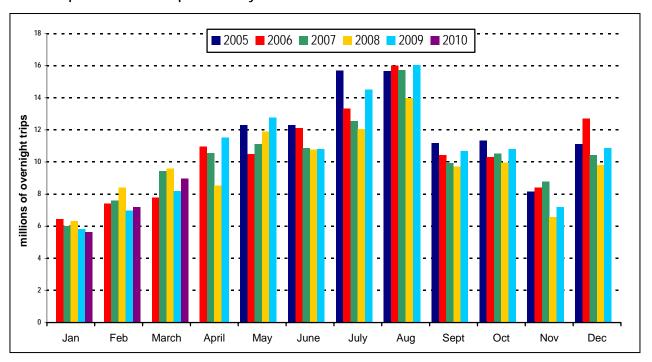
### **Outbound Travel - UK Residents**

	1	TRIPS (MILLIONS	S)	SPEND (£BN)				
-	2009	2010	% +/-	2009	2010	% +/-		
March 2009	3.9	3.6	-8%	2.3	2.2	-4%		
Jan – Mar '10	11.3	10.2	-9%	6.8	6.1	-9%		
Apr '09 – Mar '10	65.9	57.4	-13%	35.8	31.1	-13%		

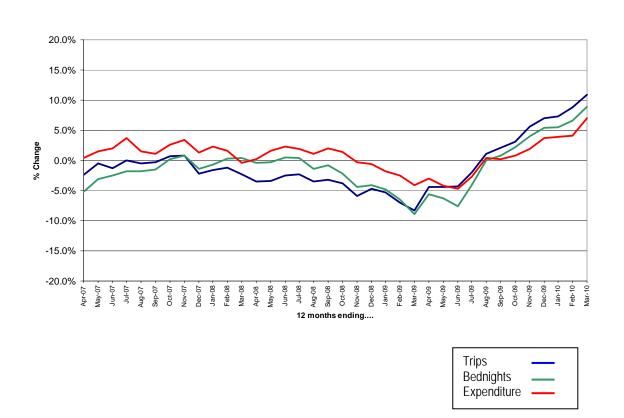
### TREND CHARTS



## 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 (March 2009 vs March 2010)
- Year to date (January March 2009 vs January March 2019)
- 12 months (April 2008 March 2009 vs April 2009 March 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 Performance 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 marked below average performance indicate where the percentage change is more than 5 percentage points below the average. The percentage points below the average and 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 (figure to two been flyered out to beloade that they should be treated whe aution).

					United Kingdom  YTD: January - March 2010 Unweighted					Unweighted		
	M Trips	onth: March 20 Bednights	110 Expenditure	Unweighted Trips	YTD: Trips	January - Marc Bednights	h 2010 Expenditure	Unweighted Trips	12 month rol Trips	ling April 2009 Bednights	- March 2010 Expenditure	Unweighted Trips
TOTAL	9.4%	7.5%	20.3%	1302	3.8%	0.9%	2.5%	3177	10.9%	8.9%	7.0%	18754
PURPOSE:												
Pure Holiday	1.9%	-1.7%	2.8%	502	-0.4%	-6.3%	3.3%	1126	18.0%	15.6%	13.7%	9299
- 1-3 nights holiday	-1.4%	-1.7%	2.1%	344	-0.7%	-0.6%	5.3%	841	18.3%	18.5%	9.7%	5548
- 4+ nights holiday	10.8%	-1.8%	4.0%	159	0.3%	-11.7%	-1.1%	285	17.6%	14.2%	17.8%	3751
VFR (on holiday)	24.0%	35.4%	33.5%	289	16.3%	20.6%	17.6%	760	9.1%	12.3%	3.3%	3741
HOLIDAY (TOTAL)	8.8%	9.5%	8.7%	792	5.5%	3.1%	6.6%	1885	15.3%	14.7%	11.7%	13040
VFR (non-holiday)	-16.0%	-20.2%	-22.2%	209	-6.0%	-7.6%	-14.2%	626	1.9%	-4.7%	-5.7%	3026
VFR (TOTAL)	2.9%	9.7%	6.6%	499	4.8%	7.4%	2.4%	1386	5.7%	5.1%	-0.7%	6767
Business	41.4%	29.0%	65.5%	255	7.7%	-2.1%	-1.4%	554	3.8%	-0.7%	-1.1%	2248
RDAs:												
Adv West Midlands	10.4%	-1.2%	28.8%	95	-15.6%	-14.7%	-18.7%	222	7.2%	-1.0%	3.1%	1160
East of England	-27.3%	-27.4%	-28.4%	80	-23.1%	-25.1%	-23.7%	233	10.3%	3.0%	-1.0%	1538
East Midlands	11.2%	40.9%	-16.0%	94	0.5%	15.5%	-14.8%	206	7.1%	4.8%	-3.4%	1152
London	17.0%	-1.2%	53.8%	148	24.4%	17.5%	24.7%	402	6.9%	-1.0%	7.7%	1590
North West	31.5%	30.6%	29.3%	148	2.2%	1.7%	-4.0%	322	7.9%	5.4%	0.8%	2002
ONE North East	30.0%	39.6%	42.4%	40	5.6%	8.1%	43.0%	107	-3.5%	-2.7%	-5.9%	554
South East England	-2.9%	10.3%	14.9%	193	16.9%	8.3%	9.9%	489	18.0%	16.2%	16.5%	2820
South West	9.9%	17.0%	24.6%	181	0.0%	-11.7%	-2.2%	407	15.7%	16.2%	17.6%	3191
Yorkshire Forward	-0.6%	-23.1%	-23.9%	118	-9.7%	-18.1%	-14.4%	270	9.9%	11.4%	9.7%	1572
LOCATION TYPE:												
Seaside	-5.6%	-13.7%	-5.3%	194	-4.2%	-18.5%	-5.7%	418	19.2%	17.5%	16.4%	4286
Large city/ large town	20.5%	20.7%	53.4%	596	5.8%	5.6%	6.7%	1460	11.1%	3.4%	1.5%	7033
Small town	5.2%	19.7%	1.0%	296	9.2%	8.6%	-3.7%	796	5.7%	4.3%	4.7%	4309
Countryside/ village	0.4%	-5.0%	-9.1%	235	-3.5%	0.0%	4.5%	552	9.8%	12.1%	11.5%	3630
AGE:	0.470	0.070	0.170		0.070	0.070	4.070		5.676	12.170	11.070	
16-24	2.3%	16.5%	-11.8%	160	7.4%	22.3%	-4.2%	424	-1.2%	-3.5%	-8.8%	2029
25-34	26.9%	34.5%	28.3%	218	11.7%	7.8%	-8.3%	529	19.6%	-20.4%	9.6%	3036
35-44	5.6%	9.8%	20.7%	246	5.0%	6.4%	7.5%	661	14.2%	14.4%	6.4%	4170
45-54	26.2%	18.2%	34.9%	247	0.5%	-10.5%	-1.7%	565	12.0%	13.5%	8.7%	3267
55+	-2.7%	-9.3%	18.8%	432	-1.0%	-6.8%	12.2%	997	8.1%	4.6%	10.9%	6254
SEG:	2.770	0.070	10.070		1.070	0.070	12.270		0.170	4.070	10.070	
AB	10.7%	0.4%	23.5%	445	2.9%	-6.8%	3.3%	1080	8.4%	4.3%	2.9%	6072
C1	2.1%	5.9%	15.0%	394	1.1%	0.3%	-4.0%	1020	10.8%	12.5%	11.9%	5853
C2	24.3%	46.3%	34.3%	233	11.4%	20.9%	28.2%	516	11.4%	5.4%	5.3%	3242
DE	5.7%	-7.5%	0.0%	230	4.8%	2.8%	-13.4%	560	16.5%	15.2%	10.0%	3588
CHILDREN IN H/H:	5.776	-7.5%	0.0%	230	4.0%	2.0%	-13.476	300	10.5%	15.2%	10.0%	3000
Any	15.9%	14.1%	23.2%	435	14.5%	10.9%	5.3%	1098	16.1%	16.1%	6.5%	6633
None	6.8%	5.2%	19.2%	867	-0.3%	-2.7%	1.5%	2079	8.5%	5.7%	7.1%	12122
ACCOMMODATION:	0.078	3.276	13.276	557	-0.576	-2.1 /6	1.576	2075	0.576	3.1 /6	7.176	12.122
Commercial accom	14.9%	7.6%	18.5%	717	4.7%	-2.0%	2.4%	1662	13.6%	10.6%	8.5%	10662
	20.3%			556		5.8%		1358		7.6%		6967
- Serviced accom		13.0%	24.2%		6.7%		5.0%		10.6%		5.1%	
- Hotel/motel/guesthouse	17.5%	11.6%	23.7%	503	6.9%	6.6%	5.5%	1247	10.8%	7.6%	4.5%	6150
- Bed & Breakfast	50.6%	27.0%	30.2%	54	3.8%	-1.5%	-2.0%	113	6.5%	8.1%	9.9%	852
Total self-catering rented	4.4%	10.2%	-5.0%	133	1.8%	-14.2%	-10.5%	241	26.1%	19.9%	18.8%	3394
-Camping & Caravanning (inc. owned caravans)	0.5%	7.5%	20.3%	93	2.4%	3.5%	12.6%	125	23.9%	18.0%	16.3%	2681
-Other self-catering rented	0.0%	-6.7%	-18.2%	69	-2.6%	-26.7%	-18.7%	152	22.8%	15.3%	17.3%	1303
Hostels	-3.8%	-39.2%	146.7%	22	5.8%	-6.2%	37.3%	50	-7.1%	-17.3%	4.6%	225

Comparisons with equivalent periods, 2009

	England											
	M	lonth: March 20	110	Unweighted	YTD:	Eng January - Marc	gland h 2010	Unweighted	12 month ro	iling April 2009	- March 2010	Unweighted
	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips	Trips	Bednights	Expenditure	Trips
TOTAL	6.5%	6.4%	16.5%	1074	1.7%	-3.5%	0.1%	2610	10.8%	8.7%	8.0%	15270
PURPOSE:												
Pure Holiday	1.9%	3.8%	0.4%	405	-2.3%	-7.4%	0.4%	874	19.2%	19.1%	15.2%	7233
- 1-3 nights holiday	-3.2%	-4.4%	-2.9%	274	-1.6%	0.0%	1.7%	652	19.0%	20.1%	8.5%	4361
- 4+ nights holiday	15.7%	11.2%	6.6%	133	-4.7%	-14.2%	-2.3%	223	19.5%	18.6%	22.7%	2866
VFR (on holiday)	12.8%	24.3%	14.6%	243	10.1%	10.2%	5.8%	637	9.2%	10.5%	4.5%	3140
HOLIDAY (TOTAL)	5.7%	10.7%	3.4%	649	2.5%	-0.9%	1.7%	1510	16.0%	16.7%	13.1%	10373
VFR (non-holiday)	-12.7%	-15.4%	-17.8%	191	-4.0%	-9.0%	-16.8%	559	1.9%	-6.1%	-9.7%	2656
VFR (TOTAL)	-0.4%	6.6%	0.4%	435	2.9%	1.2%	-4.7%	1196	5.7%	3.2%	-1.9%	5799
Business	34.4%	11.4%	61.5%	200	3.3%	-6.5%	1.3%	445	3.1%	-3.3%	1.9%	1864
RDAs:												
Adv West Midlands	10.4%	-1.2%	28.8%	95	-15.6%	-14.7%	-18.7%	222	7.2%	-1.0%	3.1%	1160
East of England	-27.3%	-27.4%	-28.4%	80	-23.1%	-25.1%	-23.7%	233	10.3%	3.0%	-1.0%	1538
East Midlands	11.2%	40.9%	-16.0%	94	0.5%	15.5%	-14.8%	206	7.1%	4.8%	-3.4%	1152
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North West	31.5%	30.6%	29.3%	148	2.2%	1.7%	-4.0%	322	7.9%	5.4%	0.8%	2002
ONE North East	30.0%	39.6%	42.4%	40	5.6%	8.1%	43.0%	107	-3.5%	-2.7%	-5.9%	554
South East England	-2.9%	10.3%	14.9%	193	16.9%	8.3%	9.9%	489	18.0%	16.2%	16.5%	2820
South West	9.9%	17.0%	24.6%	181	0.0%	-11.7%	-2.2%	407	15.7%	16.2%	17.6%	3191
Yorkshire Forward	-0.6%	-23.1%	-23.9%	118	-9.7%	-18.1%	-14.4%	270	9.9%	11.4%	9.7%	1572
LOCATION TYPE:												
Seaside	-6.1%	-3.5%	-2.2%	168	-1.1%	-13.3%	-3.4%	351	21.2%	20.0%	17.8%	3406
Large city/ large town	15.2%	10.1%	47.3%	485	5.1%	-1.5%	5.4%	1237	10.7%	1.7%	2.5%	5950
Small town	-1.0%	11.8%	-7.5%	241	2.5%	0.8%	-10.8%	634	5.1%	4.4%	5.2%	3443
Countryside/ village	4.4%	4.3%	-6.2%	196	-8.5%	-3.2%	1.6%	425	9.1%	11.2%	12.3%	2860
AGE:	4.470	4.070	0.270		0.070	0.270	1.070		5.176	11.270	12.070	
16-24	4.5%	27.0%	-13.7%	137	7.6%	21.2%	-6.2%	356	-5.0%	-7.4%	-11.9%	1667
25-34	27.0%	36.5%	33.9%	192	13.5%	5.5%	-4.5%	454	22.6%	19.6%	11.6%	2513
35-44	2.8%	5.7%	19.8%	200	-1.1%	-7.0%	-2.1%	523	14.4%	13.0%	9.2%	3347
45-54	14.5%	15.5%	32.5%	183	-1.1%	-10.7%	1.6%	438	10.8%	11.4%	10.2%	2581
55+	-4.9%	-13.7%	8.2%	364	-2.5%	-11.3%	6.5%	843	9.0%	6.2%	11.6%	5178
SEG:	-4.9%	-13.7%	8.2%	364	-2.5%	-11.3%	6.5%	843	9.0%	6.2%	11.6%	5178
				370				898				4990
AB	5.2%	-5.3%	12.7%		0.7%	-11.0%	1.2%		7.4%	1.1%	4.3%	
C1	0.0%	5.9%	17.0%	326	-1.2%	-4.2%	-4.5%	847	8.4%	11.8%	10.6%	4750
C2	22.3%	35.1%	30.9%	187	7.2%	3.3%	17.8%	404	15.3%	8.3%	8.4%	2641
DE	8.2%	11.1%	12.1%	191	6.3%	13.3%	-13.0%	457	20.2%	19.6%	12.6%	2878
CHILDREN IN H/H:												
Any	16.3%	23.7%	28.8%	367	14.6%	8.9%	2.6%	915	17.7%	17.1%	10.9%	5397
None	2.7%	0.7%	12.1%	709	-3.2%	-7.8%	-0.9%	1697	7.8%	5.1%	6.9%	9874
ACCOMMODATION:												
Commercial accom	11.0%	3.9%	14.0%	582	2.1%	-6.7%	1.5%	1338	14.5%	12.2%	10.3%	8581
- Serviced accom	13.5%	5.4%	19.9%	435	2.7%	-0.9%	3.7%	1082	10.6%	8.3%	6.4%	5674
- Hotel/motel/guesthouse	11.6%	4.1%	19.9%	397	2.4%	-0.8%	3.6%	994	11.0%	8.2%	6.0%	5041
- Bed & Breakfast	29.9%	17.2%	20.0%	38	2.7%	-1.5%	4.3%	88	4.6%	9.2%	9.0%	655
Total self-catering rented	8.7%	12.7%	-8.7%	122	1.8%	-17.8%	-11.9%	195	30.5%	24.6%	22.2%	2662
-Camping & Caravanning (inc. owned caravans)	3.9%	32.9%	22.6%	79	1.1%	21.6%	5.3%	99	31.3%	29.0%	4.3%	2046
-Other self-catering rented	8.0%	-7.2%	-26.0%	63	-0.5%	-33.8%	-17.9%	120	22.7%	15.8%	18.2%	1007
Hostels	23.4%	-25.3%	230.0%	20	33.6%	23.6%	72.2%	46	-10.0%	-19.0%	12.0%	160
Own home/friends'/relatives'	-0.8%	7.0%	15.3%	469	-0.9%	-3.8%	-7.0%	1223	6.5%	4.1%	-0.1%	6490
	0.078	7.070	.0.0,8		0.078	0.073	,		0.0 /3		0.173	