

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			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)

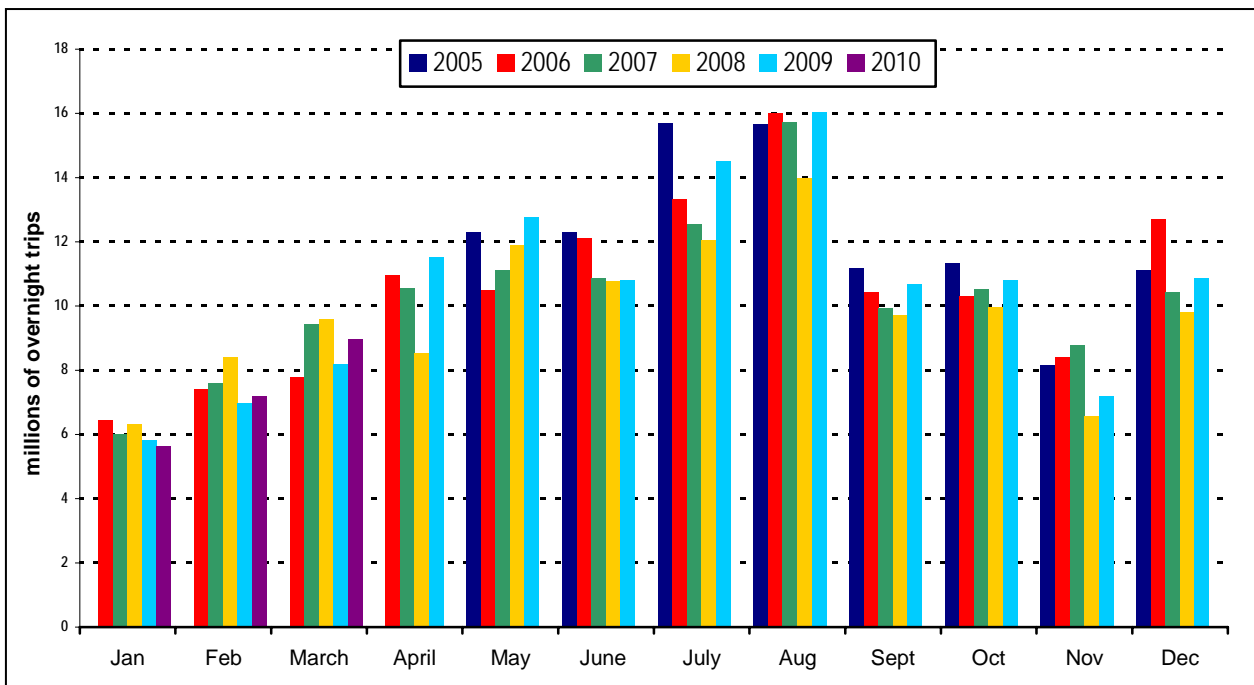
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	7.6	7.5	0%	21.8	20.4	-6%	£1,429	£1,476	3%
Business	4.1	4.4	8%	9.5	9.3	9%	£1,020	£1,006	-1%
VFR	8.7	9.1	5%	21.8	23.5	7%	£820	£840	2%
England									
Holiday	6.0	5.8	-2%	17.1	15.8	-7%	£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

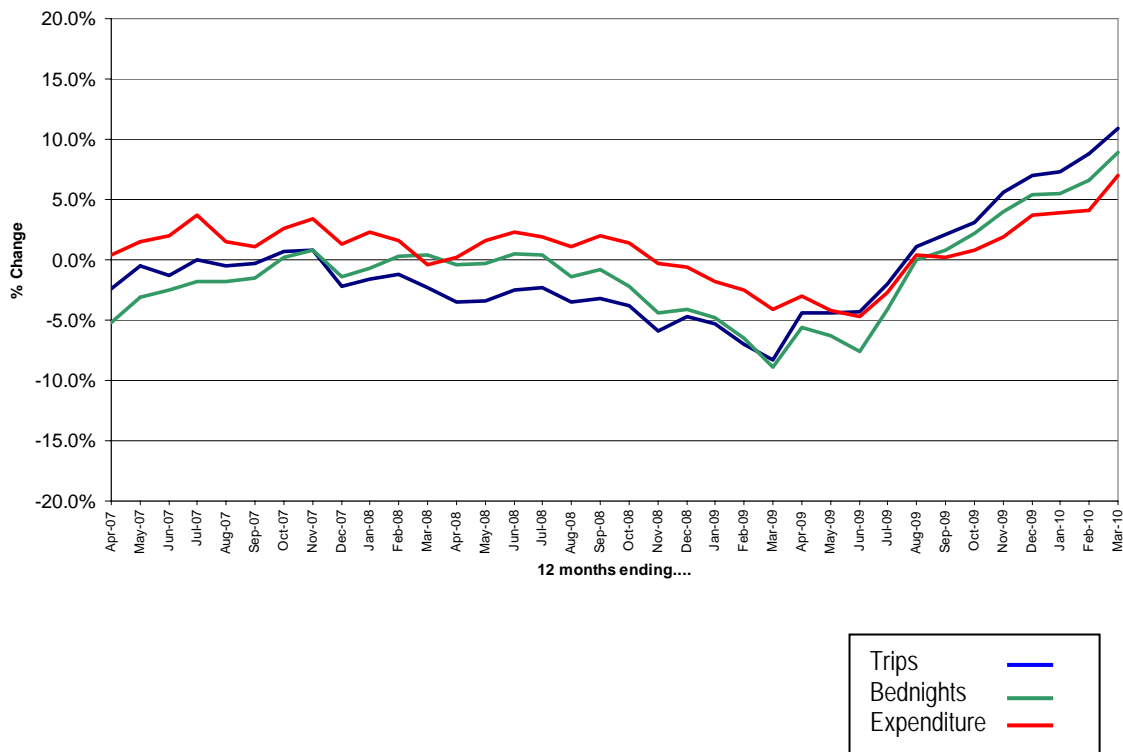
	TRIPS (MILLIONS)			SPEND (£BN)		
	2009	2010	% +/-	2009	2010	% +/-
March 2009	3.9	3.6	-8%	2.3	2.2	-4%
Jan – Mar '10	11.3	10.2	-9%	6.8	6.1	-9%
Apr '09 – Mar '10	65.9	57.4	-13%	35.8	31.1	-13%

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 2010)
- 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.

