

UK TOURISM SURVEY - MAY 2009 SUMMARY OF RESULTS

1. Headlines

- In the month of May, domestic tourism trips in the UK increased by 7% compared to May 2008, with the highest trip volume in this month since the start of the current UKTS in 2005. The number of bednights increased by 6%, but spend growth lagged behind (+2%).
- Within England, trips increased by 5% while nights were up by 6% and spend by 2%.
- In the first five months of this year, overall trip numbers have shown a marginal increase (+1%), but spend has fallen back (-3%)
- In the past 12 months, 118.2 million overnight trips were taken in the UK, 5.5 million fewer than in the 12 months from June 2007 to May 2008, a drop of 4%.

2. Trip Characteristics

- Continuing the trend seen in previous months, 2009's overall "flat" performance masks considerable differences by trip characteristics.
- Between January and May, the number of "pure" holiday trips increased significantly (+16% UK, +15% England) – though holiday spending showed a more modest increase (+5% for both UK and England)
- At the same time, there were decreases in business trips (down 10%) and visiting friends and relatives (-6%)
- Seaside destinations have benefited from the increase in leisure tourism, with 21% volume growth compared to the same period last year. Trips to the countryside are also up (+7%), but the reduction in business travel has impacted urban destinations, with 5% fewer trips being made to large towns and cities.
- Self-catering accommodation (up 25% since the start of the year) and specifically camping and caravanning (up 24%) continue to benefit from budget-conscious travellers.
- There are some indications that families in particular are rediscovering domestic breaks – trips among households with children are up by 4% since the start of the year, and 18% in the month of May, while there is virtually no change in households without children.

3. Overseas Travel by UK Residents

- In May, UK residents made 13% fewer trips abroad than in May 2008, and from January – May 2009, trips were down by 17% - while total domestic travel may be showing only low level growth, it is holding up far more strongly than outbound travel.

4. Other Tourism Surveys

- In the month of May, occupancy in UK serviced accommodation fell by 2% vs. the previous year, down to 47%.
- Inbound travel to the UK continued to be impacted by the economic downturn, with visitor numbers falling 14% in the month of May and 10% in the first four months of the year.
- May 2009 saw a 9% increase in visits to visitor attractions compared to the previous year.

- KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
May 09									
UK	11.9	12.8	+7%	37.5	39.8	+6%	2,140	2,180	+2%
England	9.7	10.2	+5%	29.6	31.4	+6%	1,674	1,709	+2%
Jan – May 2009									
UK	44.8	45.3	+1%	130.8	132.1	+1%	7,751	7,512	-3%
England	36.7	37.2	+1%	105.7	106.1	+0%	6,143	5,972	-3%

Purpose of Trip – May 2009

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	6.0	7.1	+18%	21.4	24.8	+16%	1,223	1,318	+8%
Business	1.7	1.7	+1%	4.0	4.5	+14%	422	420	-1%
VFR	3.9	3.8	-4%	11.1	9.9	-11%	434	422	-3%
England									
Holiday	4.7	5.5	+17%	16.2	19.2	+19%	955	1,020	+7%
Business	1.4	1.3	-4%	3.2	3.2	+1%	319	306	-4%
VFR	3.4	3.2	-5%	9.2	8.4	-8%	348	366	-4%

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

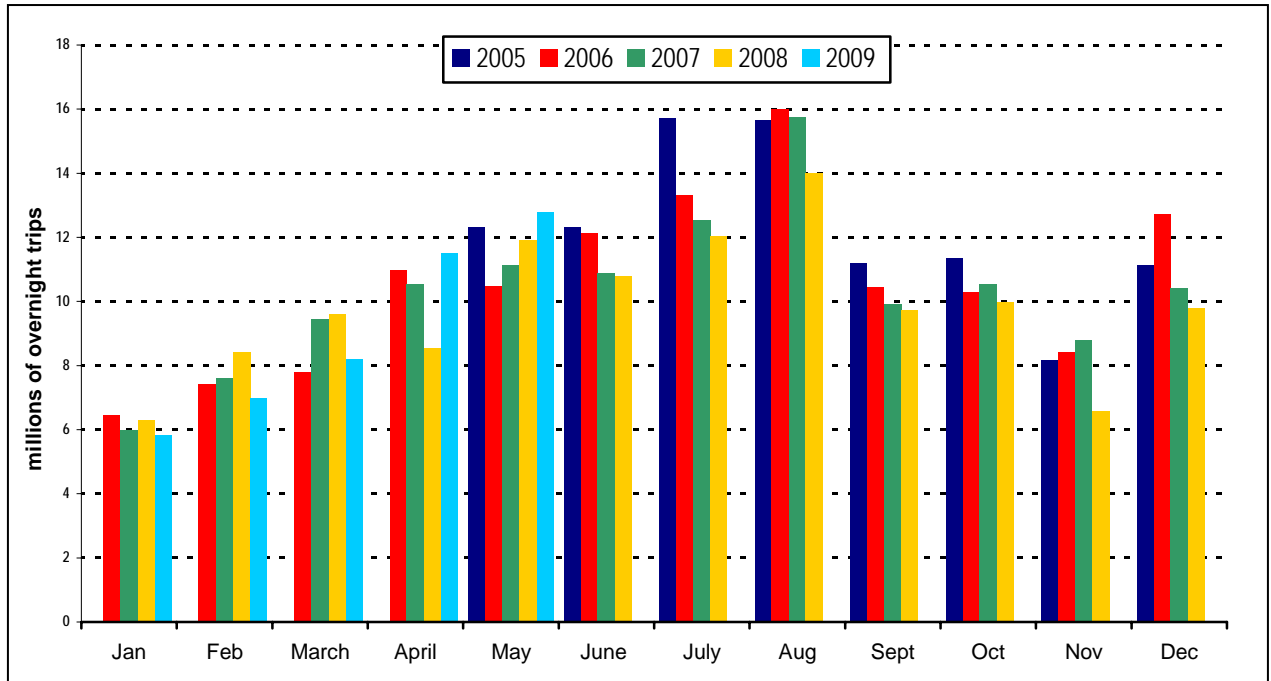
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	17.7	20.5	+16%	56.8	67.3	+18%	3,706	3,890	+5%
Business	7.9	7.2	-10%	18.6	17.5	-6%	1,975	1,783	-10%
VFR	17.5	16.5	-6%	49.1	44.4	-10%	1,836	1,676	-10%
England									
Holiday	14.0	16.0	+15%	44.1	52.1	+18%	2,892	3,027	+5%
Business	6.6	6.0	-10%	15.4	14.0	-9%	1,600	1,398	-13%
VFR	14.8	14.3	-4%	41.1	37.4	-9%	1,459	1,416	-3%

Outbound Travel – UK Residents

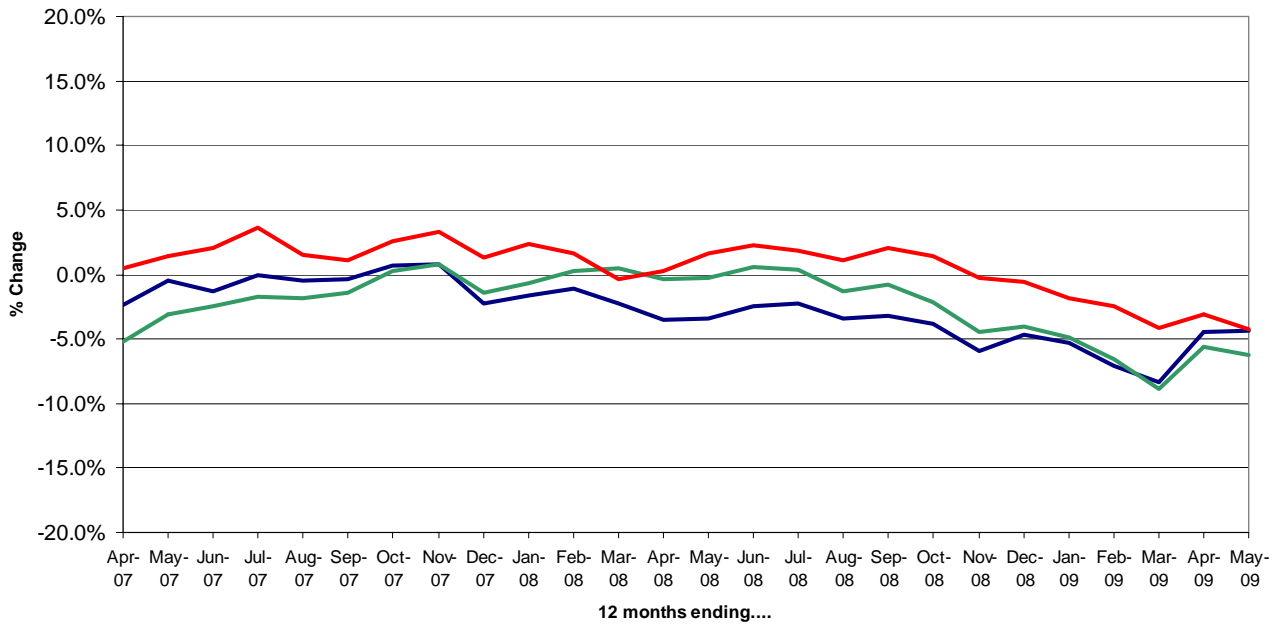
	TRIPS (MILLIONS)			SPEND (£BN)		
	2008	2009	% +/-	2008	2009	% +/-
May 2009	5.8	5.1	-13%	2.9	2.7	-8%
Jan – May 2009	26.0	21.6	-17%	13.5	11.4	-16%
June 08 – May 09	64.4	65.5	-8%	36.1	34.7	-4%

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
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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: May 2009			Unweighted Trips	YTD: January - May 2009			Unweighted Trips	12 month rolling June 2008-May 2009			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	7.1%	6.0%	1.9%	1995	1.1%	1.0%	-3.1%	6766	-4.4%	-6.4%	-4.2%	17587
PURPOSE:												
Pure Holiday	18.3%	15.9%	7.8%	1140	16.1%	18.4%	5.0%	3187	1.3%	-1.5%	-2.7%	8517
- 1-3 nights holiday	17.9%	17.8%	3.5%	702	15.6%	12.9%	0.6%	2093	3.2%	1.3%	1.6%	5042
- 4+ nights holiday	18.9%	14.8%	12.9%	438	17.3%	22.4%	11.9%	1094	-1.8%	-2.8%	-6.8%	3475
VFR (on holiday)	-1.0%	0.8%	-2.3%	327	-4.8%	-3.4%	-9.9%	1348	-2.3%	-9.2%	-4.5%	3534
HOLIDAY (TOTAL)	13.4%	12.7%	6.2%	1467	9.1%	11.5%	1.8%	4535	0.2%	-3.6%	-3.0%	12051
VFR (non-holiday)	-6.4%	-22.7%	-3.3%	266	-7.2%	-16.9%	-7.4%	1182	-16.7%	-16.0%	-13.4%	3000
VFR (TOTAL)	-3.6%	-10.5%	-2.8%	593	-6.0%	-9.6%	-8.7%	2529	-9.6%	-12.2%	-8.6%	6533
Business	0.8%	13.5%	-0.5%	228	-9.7%	-5.9%	-9.7%	881	-4.9%	-7.8%	-1.9%	2135
RDAs:												
Adv West Midlands	-34.3%	-11.1%	-48.4%	89	-8.4%	-12.6%	-17.2%	451	-13.3%	-19.7%	-16.0%	1066
East of England	25.0%	17.1%	-7.4%	198	14.0%	5.9%	-7.3%	614	-6.4%	-11.1%	-13.5%	1520
East Midlands	-1.6%	12.2%	-30.6%	128	5.1%	-0.4%	-8.5%	422	-1.2%	4.0%	-2.6%	1112
London	13.2%	-17.0%	30.6%	162	-7.0%	-19.1%	-5.1%	627	0.6%	-2.9%	-3.0%	1518
North West	-0.5%	-13.0%	-14.1%	191	0.0%	3.4%	-1.2%	667	-0.6%	-3.6%	-1.9%	1896
ONE North East	-9.7%	-9.1%	-33.8%	47	-2.0%	-3.5%	-17.7%	184	8.6%	0.5%	5.4%	561
South East England	24.8%	47.6%	42.3%	316	6.2%	9.8%	4.4%	1004	-3.0%	-1.1%	2.5%	2508
South West	4.9%	5.3%	3.4%	342	0.7%	6.3%	0.7%	1098	-8.3%	-10.3%	-7.6%	2912
Yorkshire Forward	7.8%	5.3%	37.2%	173	3.2%	-0.2%	10.5%	601	-7.7%	-13.4%	-0.1%	1413
LOCATION TYPE:												
Seaside	32.3%	41.0%	20.7%	548	21.4%	32.5%	10.6%	1431	-1.0%	-0.9%	-5.5%	4000
Large city/ large town	10.7%	-3.1%	-1.9%	696	-5.4%	-12.4%	-9.5%	2623	-6.1%	-8.2%	-4.9%	6431
Small town	-7.3%	-10.7%	-8.3%	429	-4.2%	-7.1%	-6.9%	1575	-5.4%	-7.8%	-6.1%	4218
Countryside/ village	-3.5%	-3.5%	-1.3%	390	6.8%	7.1%	8.1%	1306	-3.3%	-7.8%	1.7%	3384
AGE:												
16-24	5.2%	8.7%	2.6%	218	-2.9%	-23.0%	-6.5%	797	-10.8%	-15.8%	-6.8%	2110
25-34	14.2%	-31.6%	47.6%	322	-3.1%	-26.4%	5.1%	1068	-8.4%	-28.2%	-4.8%	2770
35-44	12.2%	13.8%	-10.1%	452	5.9%	10.0%	-2.7%	1493	-4.4%	-8.1%	-4.9%	3870
45-54	3.9%	-2.3%	-4.4%	361	-0.9%	-1.0%	-7.0%	1163	-3.0%	-6.3%	-5.0%	2870
55+	1.4%	-3.8%	-6.0%	643	3.1%	4.1%	-4.1%	2246	0.4%	-0.4%	-1.8%	5966
SEG:												
AB	-5.6%	-10.2%	-6.9%	615	-1.8%	2.1%	-7.3%	2188	-2.7%	-1.6%	-1.8%	5570
C1	3.1%	-0.7%	5.0%	602	0.9%	-0.3%	3.4%	2104	-3.6%	-8.2%	-5.4%	5352
C2	20.5%	22.5%	4.3%	379	1.1%	0.2%	-8.7%	1182	-7.7%	-7.6%	-8.1%	3177
DE	34.4%	35.8%	20.1%	399	9.3%	1.7%	2.4%	1293	-6.3%	-10.6%	-3.9%	3487
CHILDREN IN H/H:												
Any	18.1%	24.3%	-4.2%	788	4.3%	9.4%	-5.7%	2335	-6.4%	-9.0%	-10.8%	6095
None	1.9%	-1.6%	4.5%	1227	-0.3%	-2.4%	-2.1%	4431	-3.5%	-5.1%	-1.5%	11492
ACCOMMODATION:												
Commercial accom	15.3%	9.8%	7.2%	1237	5.8%	6.5%	-0.7%	3789	-1.7%	-5.0%	-2.8%	9866
- Serviced accom	10.4%	3.3%	3.7%	724	0.5%	-3.4%	-6.4%	2641	-1.9%	-4.0%	-3.2%	6559
- Hotel/motel/guesthouse	6.8%	-3.8%	-0.3%	633	0.2%	-4.7%	-7.3%	2371	-1.5%	-4.0%	-2.7%	5764
- Bed & Breakfast	38.4%	58.0%	46.2%	95	1.9%	7.0%	2.3%	279	-4.1%	-3.7%	-7.7%	840
- Self-catering rented*	21.8%	14.6%	10.0%	471	24.8%	28.2%	20.1%	1002	-3.9%	-8.2%	-2.7%	2917
Camping & Caravanning*	20.6%	19.8%	0.8%	393	23.9%	27.4%	13.5%	769	2.5%	1.7%	3.0%	2386
Hostels	16.6%	5.3%	51.5%	34	-2.9%	-18.5%	15.5%	104	17.0%	9.0%	18.3%	247
Own home/friends'/relatives'	-4.1%	-3.7%	-15.6%	728	-4.3%	-4.6%	-9.2%	2892	-8.5%	-8.1%	-8.9%	7489

	England											
	Month: May 2009			Unweighted Trips	YTD: January - May 2009			Unweighted Trips	12 month rolling June 2008-May 2009			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	4.8%	6.3%	2.1%	1594	1.4%	0.4%	-2.8%	5566	-4.6%	-7.4%	-4.7%	14291
PURPOSE:												
Pure Holiday	17.1%	18.5%	6.8%	884	14.6%	18.3%	4.7%	2488	1.3%	-1.5%	-2.7%	8517
- 1-3 nights holiday	14.5%	15.0%	2.3%	546	12.2%	9.6%	-2.4%	1625	3.2%	1.3%	1.6%	5042
- 4+ nights holiday	22.0%	20.7%	12.6%	338	20.2%	24.9%	16.7%	864	-1.8%	-2.8%	-6.8%	3475
VFR (on holiday)	-3.2%	6.7%	2.3%	269	-4.8%	-3.4%	-9.9%	1348	-2.3%	-9.2%	-4.5%	3534
HOLIDAY (TOTAL)	11.6%	15.9%	6.1%	1153	9.0%	11.2%	2.8%	3656	0.2%	-3.6%	-3.0%	12051
VFR (non-holiday)	-7.2%	-22.9%	8.2%	231	-7.2%	-15.9%	-1.5%	1022	-16.7%	-16.0%	-13.4%	3000
VFR (TOTAL)	-5.2%	-8.2%	5.2%	500	-3.6%	-8.9%	-2.9%	2191	-9.6%	-12.2%	-8.6%	6533
Business	-3.9%	0.9%	-4.1%	180	-9.6%	-9.3%	-12.6%	736	-4.9%	-7.8%	-1.9%	2135
RDAs:												
Adv West Midlands	-34.3%	-11.1%	-48.4%	89	-8.4%	-12.6%	-17.2%	451	-13.3%	-19.7%	-16.0%	1066
East of England	25.0%	17.1%	-7.4%	198	14.0%	5.9%	-7.3%	614	-6.4%	-11.1%	-13.5%	1520
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Seaside	37.4%	55.1%	24.7%	422	24.2%	38.7%	13.4%	1132	-1.0%	-0.9%	-5.5%	4000
Large city/ large town	8.6%	-7.8%	-0.5%	588	-5.0%	-13.4%	-9.3%	2233	-6.1%	-8.2%	-4.9%	6431
Small town	-12.1%	-13.7%	-10.8%	337	-4.3%	-7.6%	-6.4%	1285	-5.4%	-7.8%	-6.1%	4218
Countryside/ village	-6.9%	-2.5%	-4.3%	305	7.6%	4.3%	6.9%	1053	-3.3%	-7.8%	1.7%	3384
AGE:												
16-24	-1.4%	0.1%	0.0%	179	-3.5%	-26.6%	-5.8%	658	-10.8%	-15.8%	-6.8%	2110
25-34	5.9%	22.8%	45.0%	242	-3.1%	-26.4%	5.1%	1068	-8.4%	-28.2%	-4.8%	2770
35-44	9.7%	11.0%	-13.5%	370	5.9%	10.0%	-2.7%	1493	-4.4%	-8.1%	-4.9%	3870
45-54	9.5%	10.2%	6.7%	286	-0.9%	-1.0%	-7.0%	1163	-3.0%	-6.3%	-5.0%	2870
55+	0.0%	-3.4%	-5.8%	521	3.1%	4.1%	-4.1%	2246	0.4%	-0.4%	-1.8%	5966
SEG:												
AB	-10.7%	-14.7%	-9.0%	490	-1.8%	2.1%	-7.3%	2188	-2.7%	-1.6%	-1.8%	5570
C1	2.9%	-0.4%	2.1%	484	0.9%	-0.3%	3.4%	2104	-3.6%	-8.2%	-5.4%	5352
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CHILDREN IN H/H:												
Any	16.6%	24.5%	-0.8%	620	4.3%	9.4%	-5.7%	2335	-6.4%	-9.0%	-10.8%	6095
None	-0.7%	-1.5%	3.4%	975	-0.3%	-2.4%	-2.1%	4431	-3.5%	-5.1%	-1.5%	11492
ACCOMMODATION:												
Commercial accom	15.6%	11.8%	7.8%	988	5.8%	6.5%	-0.7%	3789	-1.7%	-5.0%	-2.8%	9866
- Serviced accom	10.9%	2.5%	4.5%	600	0.5%	-3.4%	-6.4%	2641	-1.9%	-4.0%	-3.2%	6559
- Hotel/motel/guesthouse	8.4%	-4.3%	1.5%	531	0.2%	-4.7%	-7.3%	2371	-1.5%	-4.0%	-2.7%	5764
- Bed & Breakfast	38.7%	54.8%	33.8%	72	1.9%	7.0%	2.3%	279	-4.1%	-3.7%	-7.7%	840
- Self-catering rented	26.4%	21.3%	12.1%	363								