

UK TOURISM SURVEY - May 2010 SUMMARY OF RESULTS

1. Headlines

- In May 2010, the number of domestic overnight tourism trips in the UK declined by 6% compared to May 2009, although levels are still ahead of those recorded in 2006-2008.
- During the month, the total number of bednights fell by 12% while total expenditure decreased by 6%.
- Within England, trips were down by 4% against May 2009 while nights and spend fell by 14% and 5% respectively.
- In the first five months of 2010 overall trip numbers were up 1% in the UK compared to January-May 2009, while trips in England were down by 1%.
- However, nights fell by 6% in the UK and 9% in England while spend dropped by 2% in the UK and 3% in England during the five month period.
- In the past 12 months, 126.34 million overnight trips were taken in the UK, 8.2 million more than in the 12 months from June 2008 to May 2009, an increase of 7%.

2. Trip Characteristics

- In the first five months of the year, the average spend per night has actually increased compared to 2009, from £57 to £59. However, average trip length has declined (from 2.9 to 2.7 nights) and this has resulted in a lower spend per trip (from £166 to £162), driving the overall decline in value.
- Between January and May 2010, business trips were up slightly on 2009 levels (+5%) while visits to friends and family also rose by 5%.
- At the same time, "pure" holiday trips fell slightly (by -5%) compared to the same period in 2009. In particular, longer (4+ night) holiday trips decreased by (-9%) while shorter holiday trips fell to a lesser extent (-3%).
- Mirroring the decline in longer holiday trips, the number of seaside trips taken during the first five months of the year fell by -7% while trips to the countryside were also down slightly (-2%). Trips to urban locations increased slightly (trips to large city/town locations were up by 2% and trips to small towns rose by 4%) perhaps reflecting the slight improvement within the business sector.
- The fall in longer holiday trips may have resulted in a decline in camping and caravanning trips (-8%) and the slight recovery in business trips helped grow the serviced accommodation sector by 5% during the first five months of 2010.
- There were interesting differences by demographic groups – most noticeably trips in households with children increased by 7% while trips made by 16-24s also rose by 7%.

3. Overseas Travel by UK Residents

- In May, UK residents made 9% fewer trips abroad than in May 2009, spending 4% less. Between January and May, trips fell by 12% and spend by 8%.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 48% for the month of May (one percentage point higher than in May '09).
- In the VisitEngland Business Confidence Monitor, when asked about the April-May period, 32% of accommodation operators said that they had more visitors than in the same period in 2009 and 35% had the same level.
- The England Attractions Monitor indicated a 10% decline in trips to visitor attractions compared to May 2009.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
May '10									
UK	12.8	12.0	-6%	39.8	34.8	-12%	2,180	2,045	-6%
England	10.2	9.8	-4%	31.4	27.0	-14%	1,709	1,616	-5%
Jan – May'10									
UK	45.3	45.6	1%	132.1	124.7	-6%	7,512	7,398	-2%
England	37.2	36.9	-1%	106.1	96.4	-9%	5,972	5,770	-3%

Purpose of Trip – May 2010

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	7.1	6.6	-7%	24.8	21.4	-13%	1,318	1,263	-4%
Business	1.7	1.6	-6%	4.5	3.2	-30%	420	383	-9%
VFR	3.8	3.6	-6%	9.9	9.3	-6%	422	354	-16%
England									
Holiday	5.5	5.1	-6%	19.2	16.1	-16%	1,020	958	-6%
Business	1.3	1.3	-1%	3.2	2.6	-19%	306	322	5%
VFR	3.2	3.0	-5%	8.4	7.5	-11%	366	295	-19%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	20.5	19.5	-5%	67.3	60.3	-10%	3,890	3,818	-2%
Business	7.2	7.5	5%	17.5	15.8	-10%	1,783	1,745	-2%
VFR	16.5	17.2	5%	44.4	44.6	1%	1,676	1,617	-4%
England									
Holiday	16.0	15.1	-6%	52.1	45.7	-12%	3,027	2,920	-4%
Business	6.0	6.0	1%	14.0	12.1	-14%	1,398	1,374	-2%
VFR	14.3	14.6	3%	37.4	35.9	-4%	1,416	1,304	-8%

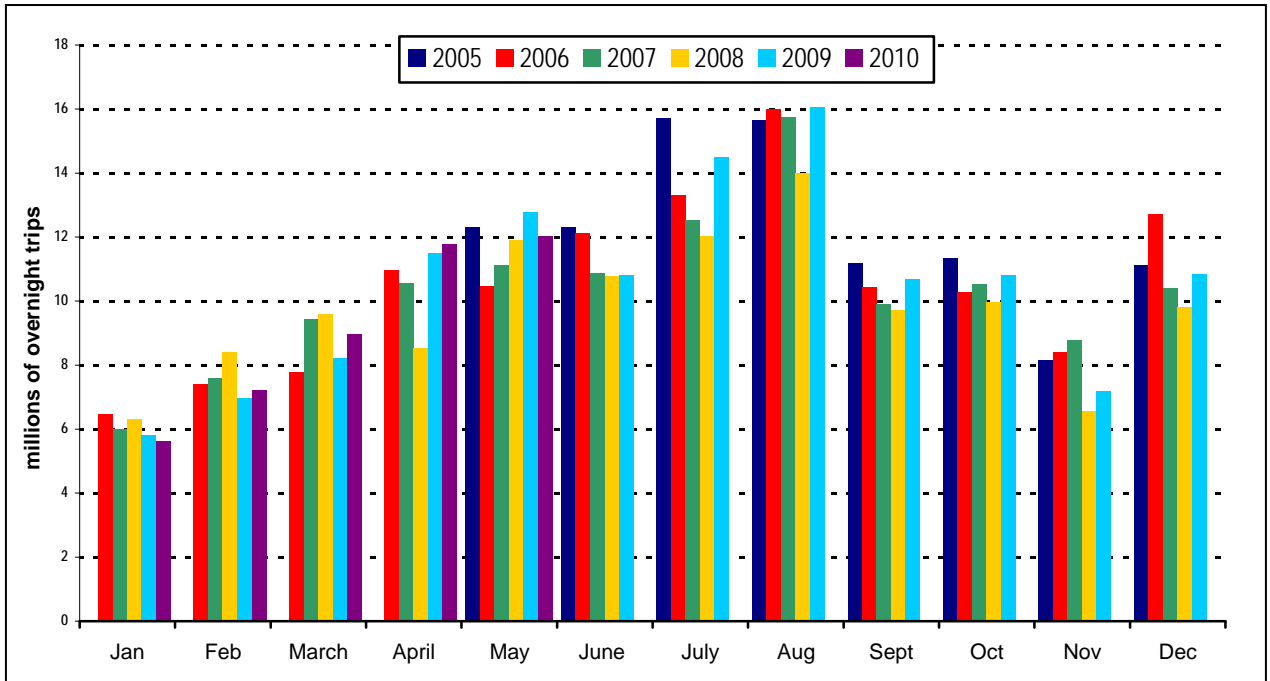
Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2009	2010	% +/-	2009	2010	% +/-
May 2010	5.1	4.6	-9%	2.6	2.5	-4%
Jan – May '10	21.5	19.1	-12%	11.9	11.0	-8%
June '09 – May '10	65.3	56.6	-13%	36.1	31.4	-13%

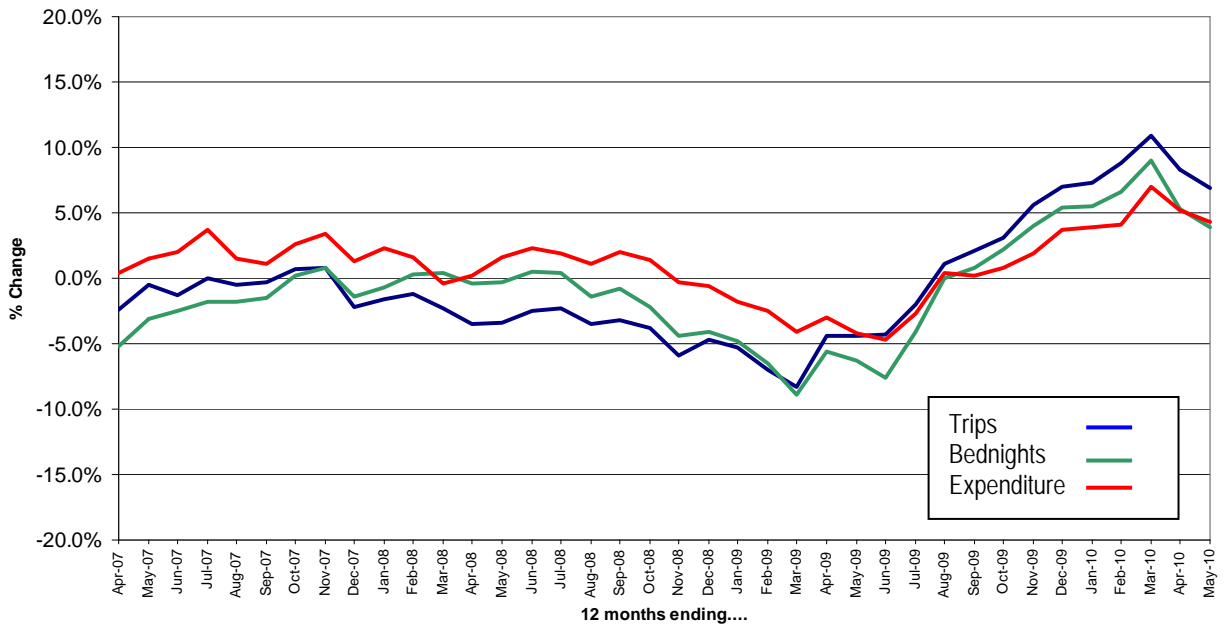
TREND CHARTS



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 (May 2009 vs May 2010)
- Year to date (January – May 2009 vs January – May 2010)
- 12 months (June 2008 – May 2009 vs June 2009 – May 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 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 2010			Unweighted Trips	YTD: January - May 2010			Unweighted Trips	12 month rolling June 2009 - May 2010			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-5.8%	-12.5%	-6.2%	1787	0.7%	-5.6%	-1.5%	6749	6.9%	3.9%	4.3%	18544
PURPOSE:												
Pure Holiday	-7.4%	-13.4%	-4.2%	990	-4.8%	-10.4%	-1.9%	2966	8.9%	6.5%	8.4%	9063
- 1-3 nights holiday	-5.2%	-9.4%	3.9%	629	-3.0%	-5.6%	2.9%	2009	9.7%	9.4%	6.4%	5451
- 4+ nights holiday	-11.6%	-15.8%	-13.1%	361	-8.8%	-16.1%	-8.7%	957	7.5%	5.0%	10.5%	3611
VFR (on holiday)	-17.9%	-12.5%	-18.5%	256	4.2%	0.5%	0.0%	1384	4.4%	7.0%	-0.9%	3665
HOLIDAY (TOTAL)	-9.8%	-13.2%	-6.2%	1247	-2.2%	-7.4%	-1.5%	4350	7.6%	6.6%	6.7%	12728
VFR (non-holiday)	7.6%	2.1%	-13.6%	295	5.2%	0.6%	-7.6%	1260	5.8%	-0.9%	-5.6%	3139
VFR (TOTAL)	-5.9%	-6.4%	-16.1%	552	4.7%	0.6%	-3.5%	2644	5.1%	3.7%	-2.9%	6804
Business	-6.4%	-29.6%	-8.8%	194	5.0%	-9.7%	-2.1%	938	5.0%	-3.1%	0.2%	2223
RDAs:												
Adv West Midlands	19.8%	10.1%	27.7%	98	-4.2%	-8.5%	-9.1%	447	11.6%	7.6%	11.0%	1175
East of England	-10.3%	-2.4%	16.1%	157	-13.5%	-11.1%	-2.5%	522	3.6%	0.1%	5.1%	1497
East Midlands	-6.4%	-24.9%	17.4%	109	5.5%	7.9%	2.5%	450	6.8%	2.8%	3.2%	1168
London	-16.9%	-9.8%	-9.5%	127	5.3%	-0.2%	4.2%	671	0.6%	-5.1%	-1.3%	1536
North West	4.4%	-3.1%	8.6%	200	3.2%	-6.1%	3.9%	708	7.0%	0.8%	5.3%	2016
ONE North East	32.4%	9.1%	95.3%	57	15.0%	12.2%	57.5%	211	-0.5%	0.0%	5.0%	568
South East England	-19.3%	-29.8%	-26.8%	233	-0.7%	-13.6%	-9.4%	958	9.2%	2.7%	5.2%	2709
South West	-7.0%	-16.9%	-19.6%	324	-7.6%	-17.4%	-12.2%	995	8.0%	6.7%	9.0%	3097
Yorkshire Forward	-0.2%	-13.4%	-13.6%	162	-2.9%	-12.8%	-19.9%	595	8.5%	6.4%	-2.2%	1571
LOCATION TYPE:												
Seaside	-12.5%	-18.3%	-17.3%	477	-7.3%	-18.4%	-10.7%	1313	7.5%	2.8%	7.4%	4188
Large city/ large town	-8.9%	-17.4%	-5.5%	592	2.3%	-2.3%	1.8%	2690	8.8%	1.6%	0.8%	6951
Small town	-4.9%	-3.8%	1.3%	393	3.7%	4.5%	-0.5%	1631	2.8%	2.9%	4.1%	4286
Countryside/ village	2.1%	-4.3%	1.3%	367	-2.4%	-5.2%	-0.6%	1234	7.0%	10.3%	9.0%	3570
AGE:												
16-24	-8.3%	-20.3%	-19.9%	190	6.5%	8.3%	-0.9%	832	-1.5%	-3.9%	-9.8%	2045
25-34	-10.2%	-56.3%	-21.9%	292	0.7%	-25.8%	-14.1%	1104	12.7%	-24.9%	0.1%	3001
35-44	-11.5%	-14.2%	2.6%	388	-1.2%	-6.7%	5.0%	1477	7.8%	5.8%	7.1%	4103
45-54	4.7%	8.6%	0.2%	337	3.5%	-1.3%	-0.8%	1201	10.6%	13.0%	8.4%	3260
55+	-3.6%	-7.5%	-1.4%	580	-2.0%	-7.6%	0.6%	2135	4.6%	1.1%	7.0%	6135
SEG:												
AB	2.3%	-2.2%	-0.7%	552	5.4%	-4.3%	3.6%	2237	8.0%	1.3%	3.2%	6033
C1	-3.9%	-10.8%	-7.2%	548	-3.1%	-8.5%	-9.0%	2084	6.1%	7.7%	6.7%	5765
C2	-4.5%	-16.4%	-4.1%	334	6.4%	5.2%	15.9%	1149	8.0%	2.5%	5.9%	3193
DE	-25.6%	-25.6%	-20.5%	353	-8.3%	-13.0%	-18.8%	1279	4.9%	4.1%	0.1%	3552
CHILDREN IN H/H:												
Any	-8.0%	-13.6%	-3.1%	685	7.1%	-1.7%	5.3%	2492	10.5%	8.1%	7.2%	6615
None	-4.6%	-11.9%	-7.4%	1102	-2.1%	-7.4%	-4.1%	4257	5.3%	2.0%	3.2%	11929
ACCOMMODATION:												
Commercial accom	-4.3%	-10.9%	-0.5%	1126	1.1%	-5.0%	0.9%	3794	8.4%	5.7%	6.1%	10550
- Serviced accom	0.4%	-9.8%	-2.5%	692	4.9%	2.4%	2.1%	2742	7.5%	5.3%	3.4%	6955
- Hotel/motel/guesthouse	0.1%	-8.8%	-4.1%	603	4.8%	3.5%	2.0%	2460	7.9%	6.1%	2.9%	6135
- Bed & Breakfast	2.6%	-14.4%	8.8%	93	4.6%	-4.5%	3.5%	289	3.1%	0.6%	7.5%	854
Total self-catering rented	-6.0%	-6.0%	14.1%	421	-3.4%	-9.2%	3.7%	958	15.8%	12.4%	16.5%	3331
-Camping & Caravanning (inc. owned caravans)	-6.0%	-6.9%	23.3%	352	-7.5%	-13.3%	-7.7%	704	10.5%	5.2%	12.4%	2601
-Other self-catering rented	-7.3%	-7.5%	-1.1%	142	-2.5%	-9.7%	-1.1%	420	16.1%	13.6%	15.7%	1286
Hostels	-43.6%	-46.1%	-66.0%	18	-20.2%	-25.3%	-16.4%	83	-18.0%	-24.2%	-15.5%	200
Own home/friends'/relatives'	-6.6%	-11.3%	-20.3%	647	-1.2%	-7.3%	-9.3%	2830	4.8%	0.7%	-1.2%	7741

	England											
	Month: May 2010			Unweighted Trips	YTD: January - May 2010			Unweighted Trips	12 month rolling June 2009 - May 2010			Unweighted Trips