

UK TOURISM SURVEY - November 2009 SUMMARY OF RESULTS

1. Headlines

- During the month of November, domestic tourism trips in the UK grew by 9% compared to November 2008, though levels were well below those recorded in 2005-2007.
- However, despite the increase in trips, the number of bednights fell slightly (-1%) as did total expenditure (-2%).
- Within England, trips increased by 13% while nights and spend also rose (+5% and +3% respectively).
- Between January and November 2009, overall trip numbers were up by 7% and spend also increased (+3%).
- In the past 12 months, 124.9 million overnight trips were taken in the UK, 6.6 million more than in the 12 months from December 2007 to November 2008, an increase of 6%.

2. Trip Characteristics

- In total, the number of domestic overnight trips grew by 7% in the first eleven months of the year. However, this growth has been driven by the upsurge in "pure holiday" trips between January and November (up by +17% in the UK and +19% in England). This trend towards holidaying domestically continued in November with "pure holiday" trips up by 24% in the UK and 32% in England.
- Meanwhile, domestic overnight business trips have fallen slightly (-4% in the UK and -3% in England) in the first eleven months of 2009 albeit to a much lesser extent than inbound business trips which were down 22% during the same period. However, there are signs that the business market is settling down, with a 33% increase in business trips in the month November 2009 (although the sample size here is quite small and should be treated with caution).
- In the year-to-date, Yorkshire, the East of England, the South East and South West have all outperformed the national average with growth rates of over 10%.
- Between January and November, there were trip and spend increases amongst all age groups with the exception of 16-24s who experienced a -3% decrease in trips and a -10% reduction in spending.
- During the first eleven months of the year trips to self-catering accommodation rose by 25% while those to serviced increased to a lesser degree (5%), with spend in serviced accommodation falling by 1% reflecting the intense competition in this sector.

3. Overseas Travel by UK Residents

- In November, UK residents made 13% fewer trips abroad than in November 2008 and spent 13% less. From January – November 2009, trips were down by 15%, with spend down 14%.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 37% for the month of November (-1% lower than in November '08).
- The England Attractions Monitor showed that in the month of November visits to visitor attractions fell by -5% compared with November '08.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
November '09									
UK	6.6	7.2	9%	16.1	16.1	-1%	£1,160	£1,133	-2%
England	5.5	6.2	13%	13.1	13.8	5%	£914	£942	3%
Jan – Nov '09									
UK	107.9	115.1	7%	348.7	366.9	5%	£19,730	£20,362	3%
England	87.3	93.8	7%	272.0	286.4	5%	£15,345	£16,015	4%

Purpose of Trip – November 2009

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	2.2	2.7	24%	6.0	6.7	11%	£539	£532	-1%
Business	1.2	1.7	33%	2.7	3.1	14%	£275	£332	21%
VFR	2.9	2.6	-9%	6.7	5.7	-14%	£299	£239	-20%
England									
Holiday	1.8	2.3	32%	4.7	5.6	20%	£405	£443	9%
Business	1.0	1.4	47%	2.1	2.6	28%	£212	£275	30%
VFR	2.5	2.3	-8%	5.7	5.0	-13%	£255	£201	-21%

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

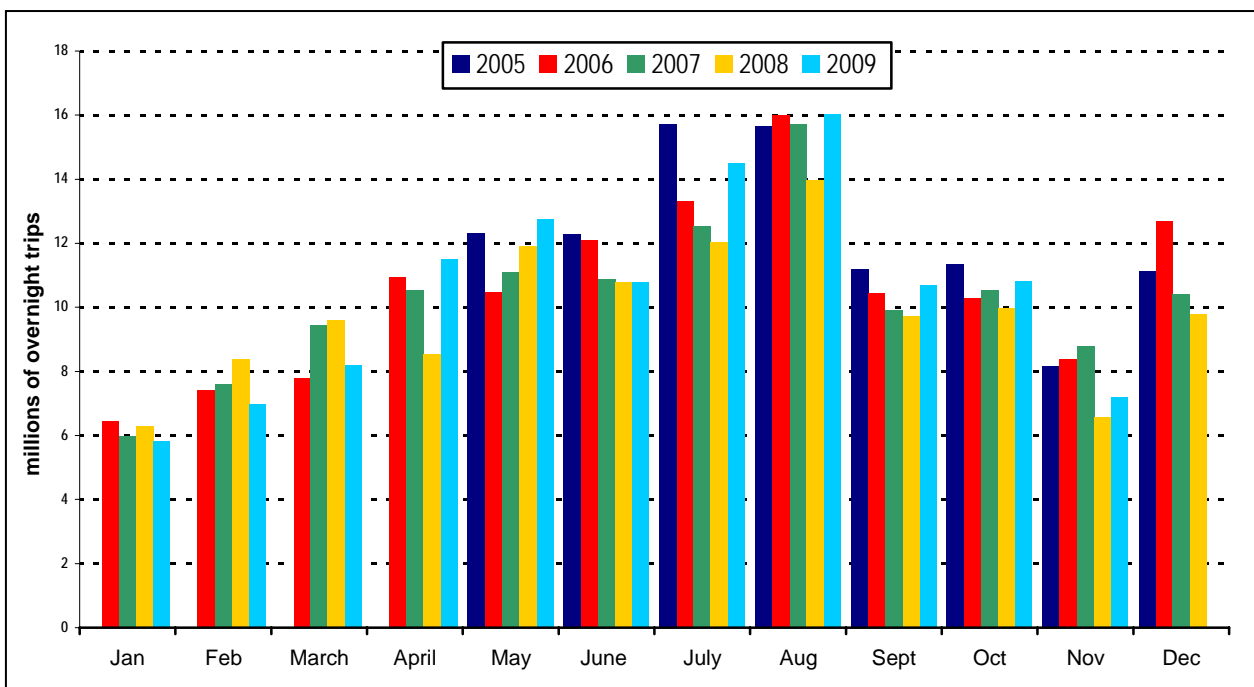
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	49.2	57.7	17%	185.2	214.3	16%	£10,812	£11,980	11%
Business	17.1	16.5	-4%	40.8	39.6	-3%	£4,233	£4,015	-5%
VFR	38.3	38.1	-0.5%	108.9	105.1	-4%	£4,222	£3,970	-6%
England									
Holiday	37.9	45.0	19%	136.8	162.9	19%	£8,220	£9,217	12%
Business	14.2	13.8	-3%	33.1	31.7	-4%	£3,363	£3,246	-3%
VFR	32.5	32.7	1%	90.3	85.6	-5%	£3,393	£3,230	-5%

Outbound Travel – UK Residents

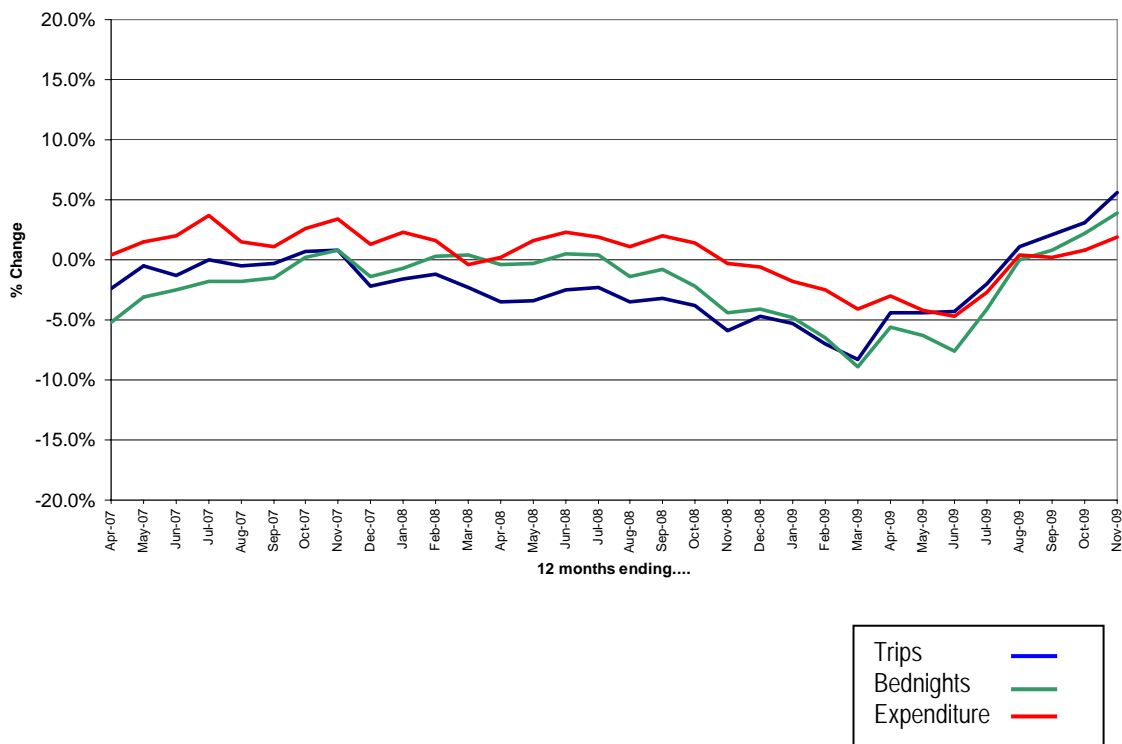
	TRIPS (MILLIONS)			SPEND (£BN)		
	2008	2009	% +/-	2008	2009	% +/-
November 2009	4.1	3.6	-13%	2.1	1.9	-13%
Jan – Nov '09	65.3	55.5	-15%	34.9	30.2	-14%
Dec '08 – Nov '09	69.5	59.1	-15%	36.9	32.1	-13%

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 (November 2008 vs November 2009)
- Year to date (January – November 2008 vs January – November 2009)
- 12 months (December 2007 – November 2008 vs December 2008 – November 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

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: November 2009			Unweighted Trips	YTD: January - November 2009			Unweighted Trips	month rolling December 2008 - November 2009			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	9.4%	-0.5%	-2.3%	940	6.7%	5.2%	3.2%	17353	5.6%	4.0%	1.9%	18622
PURPOSE:												
Pure Holiday	24.4%	10.9%	-1.3%	375	17.3%	15.7%	10.8%	8969	16.2%	14.0%	9.4%	9324
- 1-3 nights holiday	32.8%	31.3%	7.9%	294	18.0%	16.4%	5.5%	5318	17.3%	15.9%	5.0%	5571
- 4+ nights holiday	-0.5%	-9.3%	-20.8%	81	16.1%	15.4%	16.3%	3651	14.3%	13.1%	13.9%	3754
VFR (on holiday)	-11.5%	-15.2%	-28.4%	162	-0.2%	3.2%	-5.6%	3139	0.5%	2.1%	-6.2%	3623
HOLIDAY (TOTAL)	10.7%	1.6%	-7.6%	537	12.3%	12.6%	7.9%	12108	11.3%	10.7%	6.4%	12948
VFR (non-holiday)	-6.8%	-13.5%	-10.2%	197	-0.9%	-12.1%	-6.3%	2775	-4.1%	-11.9%	-9.1%	3082
VFR (TOTAL)	-9.0%	-14.4%	-20.1%	359	-0.5%	-3.6%	-6.0%	5913	-1.7%	-3.9%	-7.5%	6705
Business	33.3%	13.6%	20.7%	184	-3.5%	-2.9%	-5.2%	2064	-3.2%	-3.8%	-5.0%	2170
RDAs:												
Adv West Midlands	43.6%	49.9%	61.0%	77	6.5%	-6.9%	-3.0%	1081	3.6%	-9.1%	-6.9%	1173
East of England	53.2%	28.6%	26.6%	77	12.3%	8.7%	1.5%	1464	8.7%	9.6%	-2.5%	1574
East Midlands	-8.6%	-18.0%	-17.9%	41	7.4%	-3.5%	-1.2%	1058	7.3%	-3.7%	-0.9%	1149
London	-11.7%	-28.1%	-2.1%	87	-5.6%	-13.9%	-5.6%	1374	-4.3%	-11.2%	-4.7%	1504
North West	41.8%	11.1%	-8.5%	139	3.4%	0.7%	1.5%	1829	3.2%	-2.3%	0.3%	1950
ONE North East	-35.3%	-48.9%	-54.1%	26	-3.3%	-8.6%	-15.3%	497	0.5%	-7.8%	-16.2%	550
South East England	-4.5%	2.7%	-8.0%	136	12.4%	11.3%	10.7%	2584	11.8%	9.9%	9.0%	2775
South West	16.4%	14.1%	31.4%	128	11.5%	14.9%	14.4%	3023	10.1%	13.6%	13.3%	3211
Yorkshire Forward	33.2%	21.6%	5.9%	109	14.4%	13.4%	10.4%	1497	12.7%	10.9%	8.0%	1603
LOCATION TYPE:												
Seaside	13.7%	7.9%	-2.1%	131	17.2%	19.0%	14.5%	4165	16.2%	17.8%	13.7%	4313
Large city/ large town	5.6%	-0.5%	-1.3%	457	4.4%	-6.3%	-5.1%	6349	3.1%	-7.1%	-6.6%	6875
Small town	23.1%	10.2%	3.2%	240	0.3%	0.5%	0.8%	3905	0.6%	1.7%	0.4%	4302
Countryside/ village	-3.0%	-19.3%	-13.0%	130	9.9%	12.0%	12.4%	3413	7.9%	8.8%	10.9%	3636
AGE:												
16-24	-2.1%	-13.5%	-13.3%	136	-2.9%	-14.8%	-10.0%	1900	-4.1%	-15.1%	-11.5%	2062
25-34	26.8%	-18.3%	13.0%	160	9.2%	-27.2%	6.6%	2742	8.5%	-24.7%	4.7%	2940
35-44	22.7%	27.3%	6.8%	192	10.2%	10.9%	3.6%	3878	8.4%	9.1%	3.1%	4140
45-54	3.5%	-4.1%	-7.1%	132	9.4%	12.6%	6.7%	3020	8.8%	11.2%	6.2%	3223
55+	0.8%	-12.4%	-8.8%	321	5.1%	3.4%	3.7%	5812	4.2%	2.5%	1.8%	6256
SEG:												
AB	19.5%	-10.6%	-0.2%	331	6.2%	5.4%	-0.6%	5634	5.7%	4.3%	-2.2%	6065
C1	5.2%	3.1%	14.6%	280	6.3%	9.6%	10.1%	5389	5.0%	7.9%	8.0%	5764
C2	-2.3%	-6.1%	-25.6%	157	6.6%	-2.0%	-2.1%	3042	5.1%	-2.2%	-1.4%	3259
DE	9.7%	24.6%	-9.9%	173	8.8%	4.9%	5.4%	3288	7.2%	3.0%	4.5%	3534
CHILDREN IN H/H:												
Any	12.0%	-2.1%	-4.7%	278	9.0%	10.9%	4.0%	6039	7.9%	9.8%	3.7%	6440
None	8.5%	0.0%	-1.5%	662	5.7%	2.7%	2.9%	11314	4.6%	1.4%	1.2%	12182
ACCOMMODATION:												
Commercial accom	10.7%	0.1%	0.5%	518	10.2%	9.3%	4.9%	10211	9.2%	8.2%	3.7%	10606
- Serviced accom	6.4%	-0.3%	-2.4%	421	5.4%	3.1%	-0.8%	6536	4.9%	3.0%	-1.6%	6889
- Hotel/motel/guesthouse	6.9%	0.9%	-1.6%	386	5.4%	2.4%	-2.0%	5735	4.6%	1.8%	-2.9%	6056
- Bed & Breakfast	2.1%	-11.0%	-11.7%	39	4.0%	7.7%	9.1%	836	4.8%	10.6%	10.1%	868
Total self-catering rented	46.8%	21.6%	27.1%	74	25.4%	22.2%	21.4%	3378	23.1%	19.8%	19.5%	3401
- Camping & Caravanning (inc. owned caravans)	71.4%	33.4%	40.9%	44	20.2%	15.7%	14.6%	2701	19.8%	15.3%	14.7%	2690
- Other self-catering rented	27.3%	11.4%	25.4%	42	26.4%	24.2%	24.1%	1278	21.6%	19.3%	20.6%	1308
Hostels	23.4%	-5.8%	33.3%	17	-13.3%	-22.4%	-6.3%	211	-12.1%	-20.9%	-6.4%	218
Own home/friends/relatives'	3.4%	-8.1%	-11.5%	392	2.4%	-0.3%	-2.1%	6939	1.3%	-1.3%	-3.7%	7793

	England											
	Month: November 2009			Unweighted Trips	YTD: January - November 2009			Unweighted Trips	month rolling December 2008 - November 2009			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	13.4%	5.0%	3.1%	812	7.5%	5.3%	4.4%	14135	6.6%	4.3%	3.0%	15208
PURPOSE:												
Pure Holiday	31.6%	20.2%	9.4%	316	18.7%	19.1%	12.1%	6985	17.5%	17.1%	10.4%	7270
- 1-3 nights holiday	37.1%	35.2%	9.4%	250	18.7%	17.4%	3.6%	4183	18.0%	17.0%	3.2%	4393
- 4+ nights holiday	13.0%	3.4%	9.3%	66	18.8%	20.0%	21.7%	2797	16.7%	17.1%	18.5%	2871
VFR (on holiday)	-7.7%	-10.8%	-20.3%	141	2.1%	1.3%	-2.1%	2661	2.9%	0.3%	-3.7%	3059
HOLIDAY (TOTAL)	16.2%	8.9%	2.3%	457	13.7%	14.4%	9.5%	9643	12.8%	12.2%	7.6%	10329
VFR (non-holiday)	-8.0%	-14.6%	-20.6%	181	-0.5%	-13.0%	-8.0%	2418	-3.0%	-11.4%	-9.1%	2693
VFR (TOTAL)	-7.8%	-12.8%	-21.2%	322	0.8%	-5.2%	-4.8%	5079	0.0%	-4.9%	-6.1%	5754
Business	46.9%	28.3%	29.7%	156	-2.7%	-4.1%	-3.5%	1728	-2.1%	-5.1%	-3.2%	1824
RDAs:												
Adv West Midlands	43.6%	49.9%	61.0%	77	6.5%	-6.9%	-3.0%	1081	3.6%	-9.1%	-6.9%	1173
East of England	53.2%	28.6%	26.6%	77	12.3%	8.7%	1.5%	1464	8.7%	9.6%	-2.5%	1574
East Midlands	-8.6%	-18.0%	-17.9%	41	7.4%	-3.5%	-1.2%	1058	7.3%	-3.7%	-0.9%	1149
London	-11.7%	-28.1%	-2.1%	87	-5.6%	-13.9%	-5.6%	1374	-4.3%	-11.2%	-4.7%	1504
North West	41.8%	11.1%	-8.5%	139	3.4%	0.7%	1.5%	1829	3.2%	-2.3%	0.3%	1950
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South East England	-4.5%	2.7%	-8.0%	136	12.4%	11.3%	10.7%	2584	11.8%	9.9%	9.0%	2775
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Yorkshire Forward	33.2%	21.6%	5.9%	109	14.4%	13.4%	10.4%	1497	12.7%	10.9%	8.0%	1603
LOCATION TYPE:												
Seaside	2.7%	5.5%	-4.7%	102	19.4%	22.2%	16.2%	3296	18.9%	21.7%	15.9%	3419
Large city/ large town	9.4%	4.2%	4.3%	402	4.4%	-7.2%	-4.4%	5365	3.6%	-7.9%	-5.7%	5823
Small town	33.9%	24.7%	12.0%	211	1.4%	1.1%	3.4%	3135	1.4%	1.9%	1.9%	3457
Countryside/ village	5.0%	-15.5%	-6.3%	110	11.2%	10.6%	12.5%	2709	9.4%	8.1%	10.6%	2899
AGE:												
16-24	5.3%	-3.8%	-10.9%	127	-5.0%	-19.3%	-12.1%	1566	-5.4%	-19.5%	-13.7%	1709
25-34	29.5%	21.1%	16.3%	135	13.1%	15.8%	7.2%	2267	12.9%	15.6%	6.0%	2434
35-44	30.0%	38.5%	7.5%	172	11.8%	11.0%	7.9%	3139	10.3%	9.7%	7.1%	3362
45-54	6.2%	1.2%	5.1%	105	8.0%	9.5%	6.7%	2383	7.1%	7.6%	5.7%	2552
55+	1.9%	-10.1%	-2.2%	274	6.3%	5.2%	5.0%	4787	5.4%	4.5%	3.1%	5157
SEG:												
AB	21.1%	-6.9%	6.5%	281	6.4%	3.4%	0.5%	4617	6.2%	2.7%	-1.6%	4989
C1	9.4%	4.2%	17.9%	245	4.9%	9.6%	8.1%	4398	4.5%	8.4%	6.6%	4718
C2	3.1%	0.6%	-17.4%	136	10.9%	1.5%	2.7%	2487	8.6%	0.9%	2.7%	2666
DE	17.1%	42.5%	-12.7%	153	12.0%	5.5%	9.5%	2619	9.7%	3.7%	9.1%	2817
CHILDREN IN H/H:												
Any	26.0%	14.6%	13.8%	249	11.1%	11.6%	8.7%	4906	10.4%	10.8%	8.0%	5260
None	9.2%	2.1%	-0.4%	564	5.8%	2.6%	2.7%	9228	4.9%	1.5%	1.1%	9949
ACCOMMODATION:												
Commercial accom	19.5%	10.4%	8.8%	441	11.7%	11.7%	6.2%	8216	10.7%	10.6%	4.8%	8545
- Serviced accom	14.4%	8.2%	2.9%	363	6.5%	4.7%	-0.5%	5341	6.0%	4.5%	-1.5%	5636
- Hotel/motel/guesthouse	14.4%	9.0%	4.1%	3								