

## UK TOURISM SURVEY – NOVEMBER 2010 SUMMARY OF RESULTS

### 1. Headlines

- During the month of November, the total number of domestic overnight tourism trips made in the UK was unchanged compared with November 2009.
- At the same time, the total number of bednights made in the month rose by 8% while spend was up by 17%, driven by a higher average spend per trip.
- Within England, the number of trips taken dropped slightly (by 3%) while bednights rose marginally (+1%) on 2009 levels. Reflecting the UK trend, spend in England also rose by 13% during the month.
- Between January and November, the volume of overnight trips taken in the UK fell 4% when compared with the first eleven months of 2009, with 6% fewer bednights and a 4% decrease in spend.
- Within England, trip volumes fell by 5% while bednights and spend were down by 7% and 5% respectively when compared to January-November 2009.
- In the past 12 months 121.850 million overnight trips were taken in the UK, 3.1 million fewer than in the 12 months between December '08 and November '09.

### 2. Trip Characteristics

- In the first eleven months of 2010, the number of overnight trips taken in the UK declined across all trip purposes; business trips were down by 4% and spending by 8%, the volume and value of VFR trips decreased by 1%. The number of “pure holiday” trips taken dropped by 6% and their value by 4% compared to January-November 2009.
- There were differences in performance by location type when compared with Jan-Nov 2009 levels. Urban locations outperform the overall average, trips and spending in small towns was unchanged, and while there was a slight reduction in the number of trips to large cities/towns (-3%) expenditure was the same as in the year before. At the same time, seaside locations experienced a fall in both trips and spending (-10%) during the eleven month period and in the countryside trip volumes and spend fell by 7% and 9% respectively.
- Between January and November, trips including an overnight stay in a serviced accommodation establishment were unchanged compared to 2009 levels while self-catering establishments saw a 6% fall in trip volumes. Spend in both serviced and non-serviced accommodation establishments fell by 2% during the same period.

### 3. Longer-Term Trends

- 2009 was an exceptional year for domestic holiday tourism, and so it is helpful to understand longer-term trends when reviewing 2010 results. To enable these comparisons to be made, the third page of this document includes a comparison of November results for the past four years.
- This shows very different trends by trip purpose. The number of holiday trips taken since the start of the year was 11% higher than in 2008 and 7% higher than in 2007, and so although lower than last year, domestic holiday trip volumes and values remain at historically high levels.
- Business trips in contrast declined between 2008 and 2009, and have fallen back further over 2010, though the two most recent months have seen volumes increase compared to 2009.

### 4. Overseas Travel by UK Residents

- Travel abroad by British residents declined in 2009 and has continued to do so in 2010, with 6% fewer trips taken between January and November this year and a 2% reduction in expenditure. Outbound travel in November was down 7% on the same month in 2009.

**UK TOURISM SURVEY – NOVEMBER 2010**  
**SUMMARY OF RESULTS**  
**KEY MEASURES 2009-2010**

**Year on Year Comparison – All Trips**

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
<b>November '10</b>									
UK	7.2	7.2	0%	16.1	17.3	8%	1,133	1,330	17%
England	6.2	6.0	-3%	13.8	13.9	1%	942	1,061	13%
<b>Jan – Nov'10</b>									
UK	115.1	111.0	-4%	366.9	346.1	-6%	20,362	19,568	-4%
England	93.8	89.5	-5%	286.4	267.0	-7%	16,051	15,211	-5%

**Purpose of Trip – November 2010**

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
<b>UK</b>									
Holiday	2.7	2.5	-10%	6.7	6.3	-6%	532	554	4%
Business	1.7	1.8	7%	3.1	3.9	26%	332	421	27%
VFR	2.6	2.8	8%	5.7	6.7	18%	239	333	39%
<b>England</b>									
Holiday	2.3	2.0	-15%	5.6	4.7	-17%	443	423	-5%
Business	1.4	1.4	1%	2.6	3.1	18%	275	336	22%
VFR	2.3	2.5	7%	5.0	5.7	14%	201	282	40%

**Purpose of Trip – Year to Date (January – November 2010)**

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
<b>UK</b>									
Holiday	57.7	54.4	-6%	214.3	197.0	-8%	11,980	11,533	-4%
Business	16.5	15.8	-4%	39.6	37.1	-6%	4,015	3,682	-8%
VFR	38.1	37.7	-1%	105.1	103.4	-2%	3,970	3,927	-1%
<b>England</b>									
Holiday	45.0	42.1	-6%	162.9	148.4	-9%	9,217	8,785	-5%
Business	13.8	12.8	-8%	31.7	28.8	-9%	3,246	2,911	-10%
VFR	32.7	32.1	-2%	85.6	83.6	-2%	3,230	3,174	-2%

**Outbound Travel – UK Residents**

	TRIPS (MILLIONS)			SPEND (£BN)		
	2009	2010	% +/-	2009	2010	% +/-
November 2010	3.5	3.3	-7%	1.8	1.7	-6%
Jan – Nov '10	55.6	52.2	-6%	30.1	29.4	-2%
Dec '09 – Nov '10	59.3	55.2	-7%	32.0	31.0	-3%

**UK TOURISM SURVEY**  
**SUMMARY OF RESULTS 2007-2010**

**Year on Year Comparison – All Trips**

	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
<b>November '10</b>												
UK	8.8	6.6	7.2	7.2	22.2	16.1	16.1	17.3	1,412	1,160	1,133	1,330
England	7.2	5.5	6.2	6.0	17.4	13.1	13.8	13.9	1,127	914	942	1,061
<b>Jan – November '10</b>												
UK	113.0	107.9	115.1	111.0	361.2	348.7	366.9	346.1	19,631	19,730	20,362	19,568
England	91.7	87.3	93.8	89.5	281.9	272.0	286.4	267.0	15,264	15,345	16,015	15,211

**Purpose of Trip – November 2010**

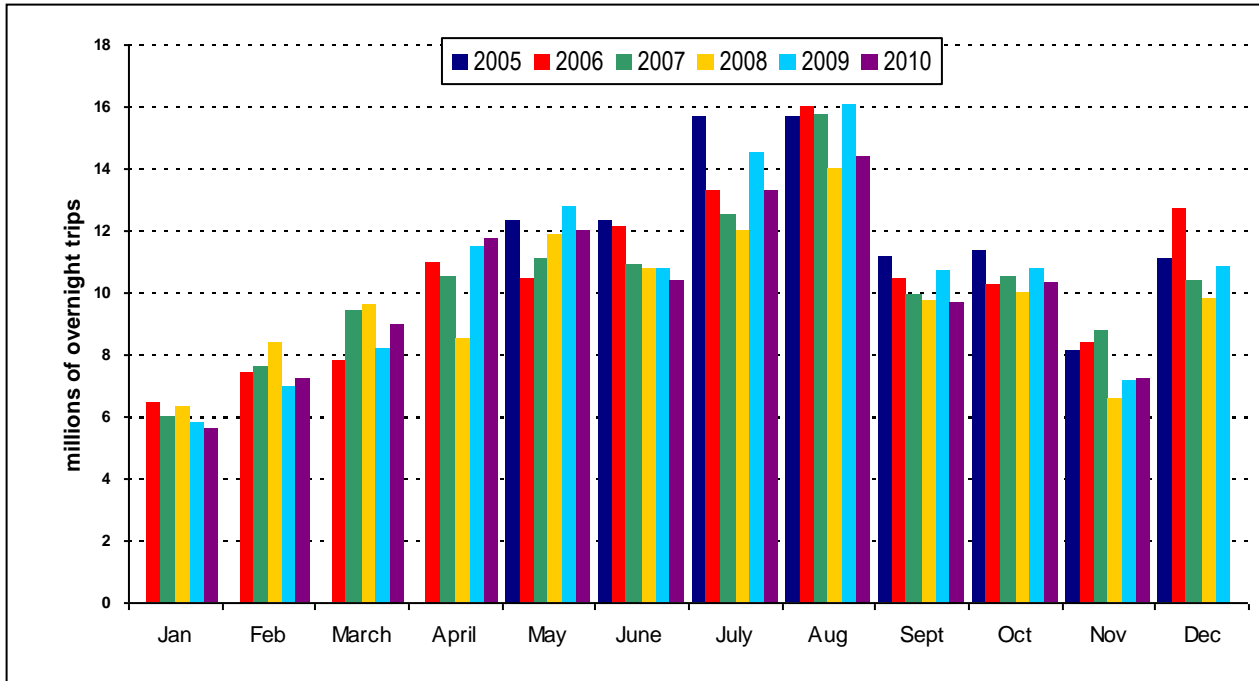
	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
<b>UK</b>												
Holiday	2.9	2.2	2.7	2.5	7.6	6.0	6.7	6.3	613	539	532	554
Business	1.6	1.2	1.7	1.8	4.3	2.7	3.1	3.9	387	275	332	421
VFR	3.9	2.9	2.6	2.8	9.5	6.7	5.7	6.72	373	299	239	333
<b>England</b>												
Holiday	2.3	1.8	2.3	2.0	5.8	4.7	5.6	4.7	474	405	443	423
Business	1.2	9.6	1.4	1.4	3.0	2.1	2.6	3.1	297	212	275	336
VFR	3.4	2.5	2.3	2.5	7.8	5.7	5.0	5.7	324	255	201	282

**Purpose of Trip – Year to Date (January – November 2010)**

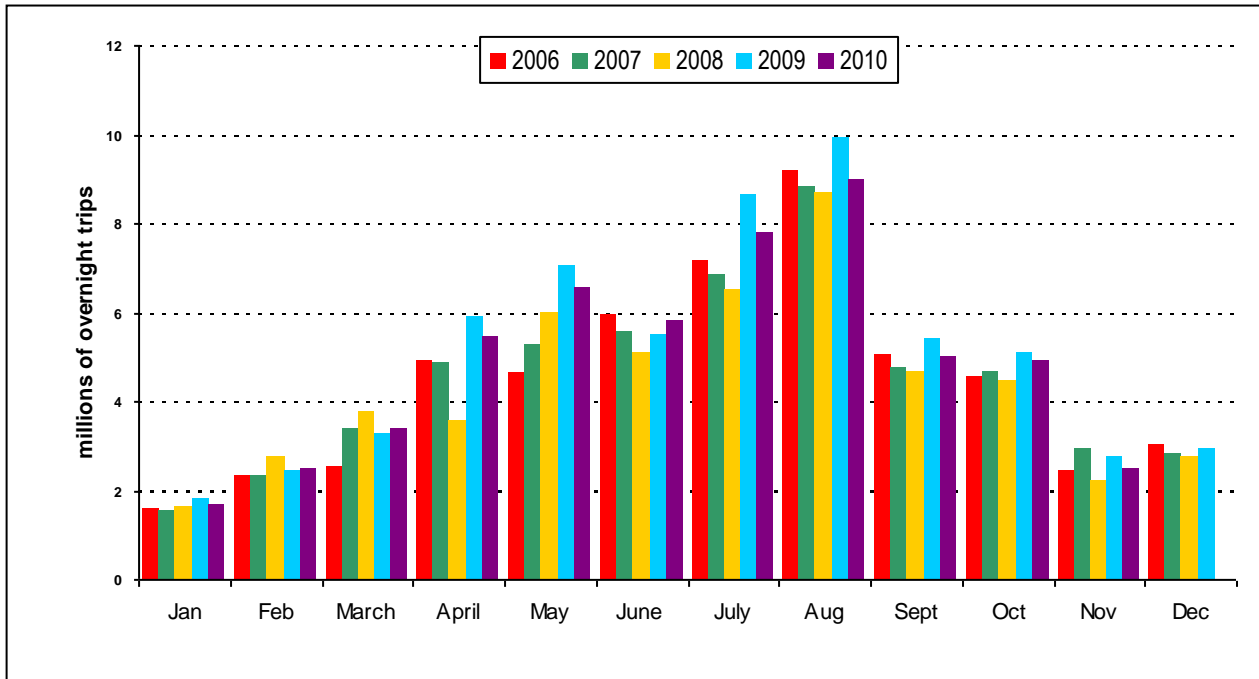
	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
<b>UK</b>												
Holiday	50.9	49.2	57.7	54.4	194.2	185.2	214.3	197.0	10,795	10,812	11,980	11,533
Business	17.7	17.1	16.5	15.8	42.4	40.8	39.6	37.1	4,193	4,233	4,015	3,682
VFR	41.5	38.3	38.1	37.7	114.5	108.9	105.1	103.4	4,196	4,222	3,970	3,927
<b>England</b>												
Holiday	39.4	37.9	45.0	42.1	145.1	136.8	162.9	148.4	8,250	8,220	9,217	8,785
Business	14.6	14.2	13.8	12.8	33.5	33.1	31.7	28.8	3,271	3,363	3,246	2,911
VFR	35.3	32.5	32.7	32.1	95.0	90.3	85.6	83.6	3408	3,393	3,230	3,174

## TREND CHARTS

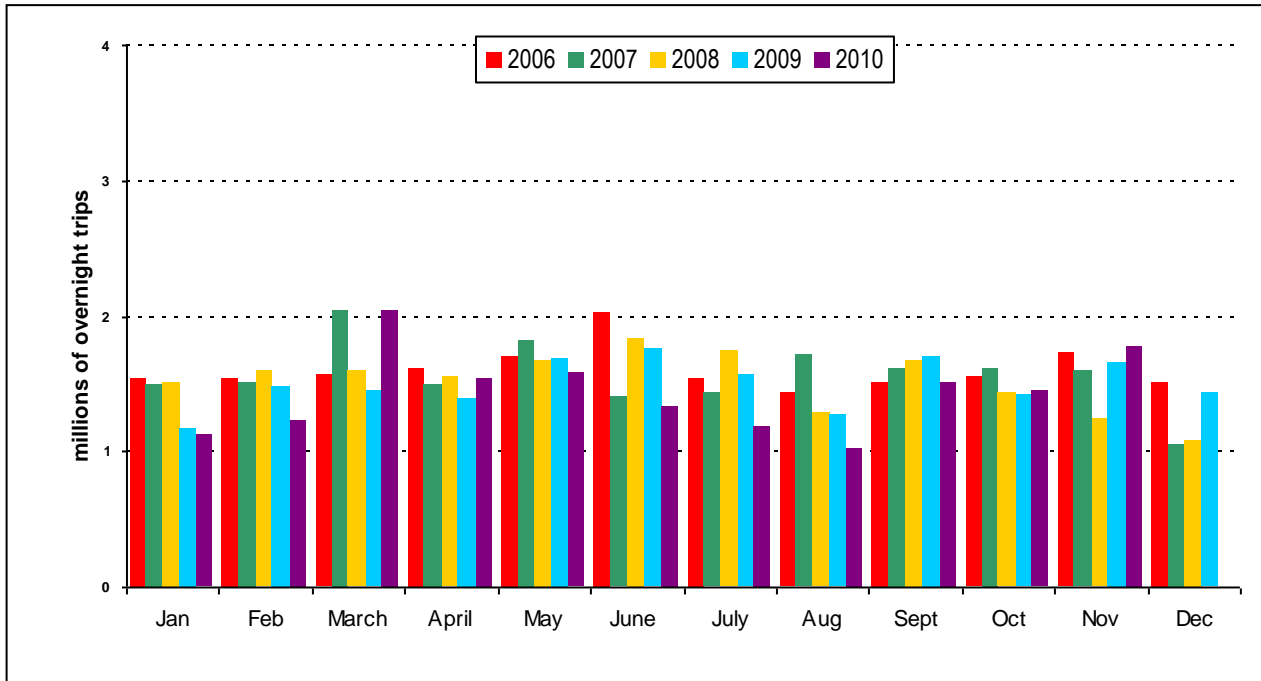
### UK All Trips – Domestic Trip Volume by Month



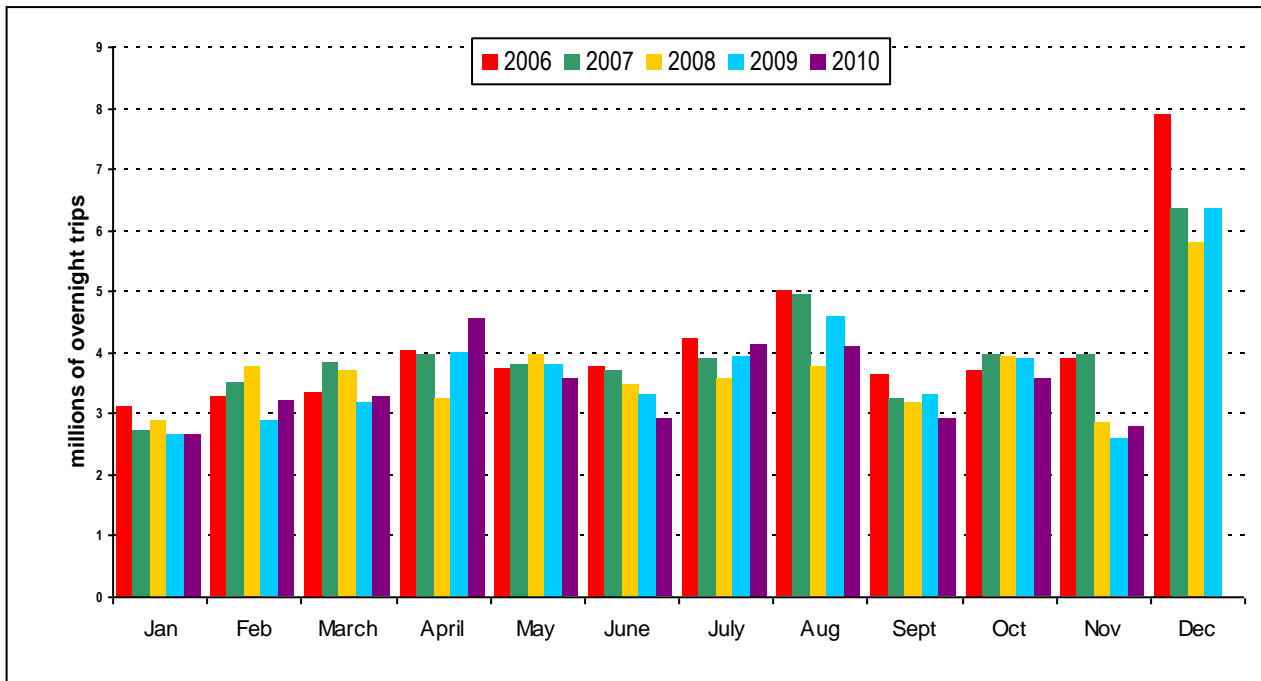
### UK Holiday Trips – Domestic Trip Volume by Month



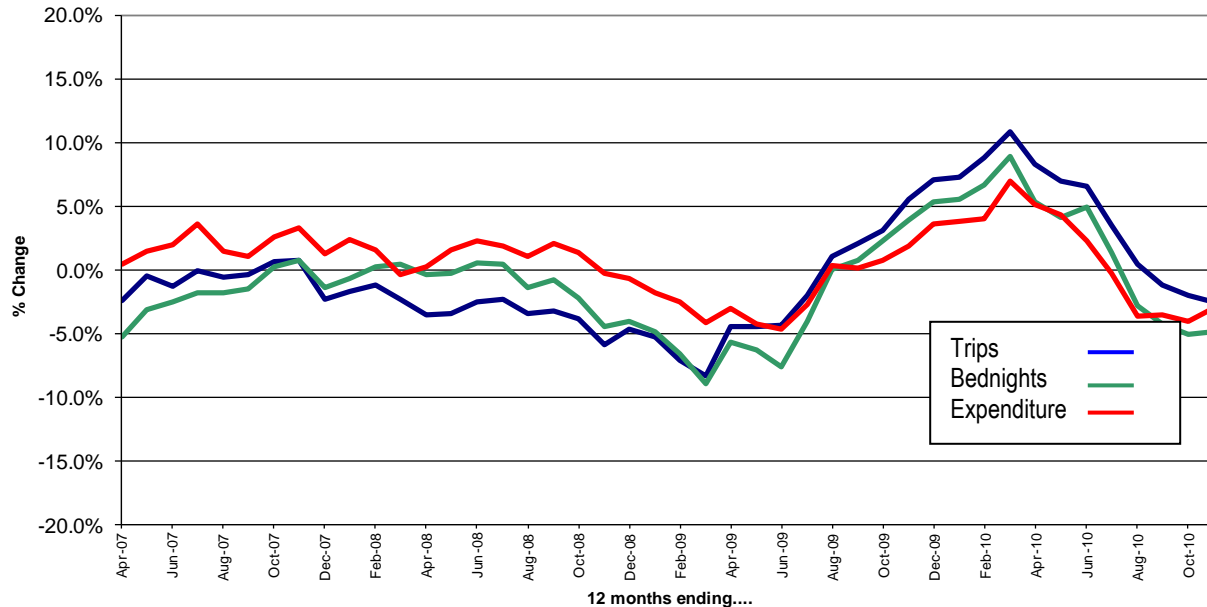
### UK Business Trips – Domestic Trip Volume by Month



### UK VFR 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 2009 vs. November 2010)
- Year to date (January – November 2009 vs. January – November 2010)
- 12 months (December 2008 – November 2009 vs. December 2009 – November 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 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				United Kingdom				United Kingdom			
	Month: November 2010			Unweighted Trips	YTD: January - November 2010			Month rolling December 2009 - November 2010			Unweighted Trips	
Trips	Bednights	Expenditure	Trips		Bednights	Expenditure	Trips	Bednights	Expenditure			
<b>TOTAL</b>	0.5%	8.0%	17.4%	890	-3.6%	-5.7%	-3.9%	16432	-2.5%	-4.7%	-3.0%	17639
<b>PURPOSE:</b>												
Pure Holiday	-9.6%	-5.5%	4.1%	316	-5.8%	-8.1%	-3.7%	8326	-5.2%	-7.7%	-3.1%	8641
- 1-3 nights holiday	-9.5%	-10.5%	10.1%	244	-4.8%	-7.2%	1.3%	4991	-4.1%	-3.9%	1.5%	8209
- 4+ nights holiday	-10.3%	-8.0%	11.2%	72	-7.4%	-10.9%	-8.5%	3335	-7.2%	-9.5%	-7.6%	3432
VFR (on holiday)	0.3%	15.7%	77.6%	155	-2.6%	-6.0%	0.8%	2974	-1.3%	-4.8%	0.9%	3463
HOLIDAY (TOTAL)	-6.6%	0.8%	17.3%	471	-5.0%	-7.6%	-3.0%	11300	-4.1%	-6.9%	-2.4%	12104
VFR (non-holiday)	14.0%	19.3%	3.3%	209	0.7%	5.0%	-3.5%	2758	2.1%	7.3%	-2.9%	3044
VFR (TOTAL)	7.6%	17.5%	39.3%	363	-1.1%	-1.5%	-1.1%	5732	0.3%	0.0%	-0.7%	6507
Business	6.9%	25.7%	26.8%	189	-4.1%	-6.3%	-8.3%	1941	-1.9%	-4.8%	-6.1%	2043
<b>RDAs:</b>												
Adv West Midlands	-13.2%	-14.8%	-10.3%	70	-5.2%	2.8%	-6.7%	1038	-2.0%	6.2%	2.5%	1136
East of England	-14.0%	16.0%	8.0%	57	-13.3%	-10.5%	-4.6%	1223	-8.8%	-10.9%	-2.5%	1347
East Midlands	-9.1%	-21.6%	-10.1%	45	0.4%	2.3%	0.0%	1069	0.3%	5.5%	0.2%	1150
London	65.5%	78.6%	73.2%	125	10.7%	7.4%	14.1%	1464	10.1%	5.9%	12.6%	1582
North West	-13.7%	-12.5%	7.3%	109	-6.9%	-7.5%	-4.8%	1696	-3.8%	-3.6%	-2.3%	1841
ONE North East	-9.0%	77.9%	17.3%	24	-5.6%	-0.8%	3.0%	476	-8.1%	1.3%	3.7%	520
South East England	5.6%	12.5%	17.3%	128	-9.3%	-12.6%	-13.9%	2238	-8.0%	-10.4%	-12.6%	2409
South West	-9.2%	-9.7%	32.9%	117	-6.7%	-8.9%	-11.2%	2796	-5.9%	-8.1%	-10.8%	2974
Yorkshire Forward	-1.8%	-10.1%	8.7%	75	-5.1%	-11.8%	-5.0%	1417	-6.2%	-11.7%	-4.2%	1497
<b>LOCATION TYPE:</b>												
Seaside	-14.0%	-13.7%	38.0%	108	-9.5%	-11.6%	-10.1%	3752	-8.2%	-10.9%	-9.4%	3894
Large city/ large town	-0.5%	2.9%	13.4%	434	-2.8%	-2.9%	0.0%	6072	-1.2%	-0.5%	0.9%	6607
Small town	4.6%	29.8%	29.7%	231	0.2%	0.0%	0.4%	3848	-0.2%	-2.1%	1.2%	4172
Countryside/ village	5.1%	14.1%	-3.4%	128	-6.6%	-6.8%	-8.9%	3090	-4.9%	-5.2%	-8.1%	3319
<b>AGE:</b>												
16-24	-0.5%	9.7%	11.1%	137	2.0%	9.3%	-3.2%	1959	-0.7%	6.3%	-5.5%	2068
25-34	-7.4%	-22.3%	39.3%	141	-9.4%	-27.9%	-14.4%	2554	-6.4%	-26.8%	-12.2%	2777
35-44	-10.1%	-13.3%	6.4%	168	-5.5%	-6.0%	-3.3%	3653	-4.2%	-5.7%	-2.1%	3894
45-54	35.0%	75.9%	31.1%	168	1.4%	-1.7%	-1.8%	2924	1.6%	-0.3%	-2.2%	3125
55+	-2.9%	1.5%	7.9%	277	-4.0%	-6.7%	-0.1%	5342	-2.0%	-5.3%	1.6%	5775
<b>SEG:</b>												
AB	1.5%	13.0%	31.1%	298	0.8%	-2.4%	0.7%	5239	0.3%	-3.4%	0.2%	5589
C1	6.0%	19.3%	10.9%	290	-6.8%	-11.1%	-9.3%	5036	-4.6%	-9.7%	-6.9%	5430
C2	1.4%	9.5%	13.2%	148	0.6%	6.7%	8.1%	2986	0.5%	7.2%	7.1%	3170
DE	-16.0%	-19.8%	-11.0%	154	-11.8%	-13.9%	-18.0%	3172	-7.9%	-9.7%	-14.9%	3451
<b>CHILDREN IN HH:</b>												
Any	-5.8%	3.2%	1.4%	257	0.9%	-2.6%	0.8%	6082	2.0%	-1.9%	0.2%	6502
None	2.8%	9.5%	22.7%	633	-5.7%	-7.2%	-5.7%	10350	-4.5%	-6.1%	-4.3%	11137
<b>ACCOMMODATION:</b>												
Commercial accom	4.0%	2.6%	18.3%	507	-2.0%	-4.6%	-2.4%	9833	-1.3%	-4.2%	-1.5%	10170
- Serviced accom	7.6%	6.8%	22.3%	427	0.4%	-1.3%	-1.7%	6444	1.0%	-1.2%	-0.8%	6759
- Hotel/motel/guesthouse	7.7%	5.4%	22.7%	392	0.9%	-1.0%	-1.2%	5684	1.8%	-0.4%	0.0%	5989
- Bed & Breakfast	0.0%	21.9%	17.0%	36	-4.2%	-2.6%	-5.5%	787	-5.6%	-5.3%	-6.5%	796
Total self-catering rented	-8.1%	-4.3%	14.8%	64	-5.5%	-5.8%	-1.8%	3135	-5.0%	-5.5%	-1.4%	3139
- Camping & Caravanning (inc. owned caravans)	-17.2%	-4.3%	3.2%	26	-8.1%	-7.8%	-7.9%	2438	-7.7%	-7.4%	-7.5%	2411
- Other self-catering rented	12.1%	10.7%	16.7%	45	-4.1%	-6.4%	0.0%	1204	-3.2%	-5.9%	0.5%	1230
Hostels	-34.8%	-43.6%	-67.9%	11	3.8%	-3.7%	-12.5%	215	6.1%	-2.8%	-8.4%	225
Own home/friends'/relatives'	-1.0%	21.7%	16.0%	366	-6.9%	-7.4%	-10.4%	6344	-4.8%	-5.7%	-9.0%	7204

## Comparisons with equivalent periods, 2009

	England				England				England			
	Month: November 2010			Unweighted Trips	YTD: January - November 2010			Month rolling December 2009 - November 2010			Unweighted Trips	
Trips	Bednights	Expenditure	Trips		Bednights	Expenditure	Trips	Bednights	Expenditure			
<b>TOTAL</b>	-3.0%	0.9%	12.6%	743	-4.6%	-6.8%	-5.0%	13244	-3.4%	-5.3%	-3.7%	14275
<b>PURPOSE:</b>												
Pure Holiday	-15.4%	-16.6%	-4.5%	249	-6.5%	-8.9%	-4.7%	6437	-5.9%	-8.2%	-3.6%	6691
- 1-3 nights holiday	-13.2%	-16.0%	2.4%	199	-5.3%	-16.5%	0.7%	3905	-4.7%	-3.9%	1.5%	4080
- 4+ nights holiday	-13.3%	-17.3%	-10.4%	50	-8.5%	-18.1%	-9.9%	2526	-7.9%	-10.3%	-8.6%	2604
VFR (on holiday)	-1.4%	11.3%	77.6%	133	-5.5%	-7.0%	-2.4%	2447	-3.3%	-4.0%	0.3%	2864
HOLIDAY (TOTAL)	-11.1%	-8.2%	10.4%	362	-6.2%	-8.5%	-4.3%	8894	-5.1%	-7.1%	-2.9%	9556
VFR (non-holiday)	13.2%	15.7%	4.8%	191	2.0%	4.0%	-0.8%	2434	3.2%	6.8%	-0.9%	2690
VFR (TOTAL)	6.6%	13.5%	40.3%	323	-1.9%	-2.4%	-1.7%	4883	-0.2%	0.4%	-0.2%	5556
Business	1.3%	18.2%	22.2%	152	-7.5%	-9.3%	-10.3%	1567	-5.4%	-8.4%	-8.5%	1654
<b>RDAs:</b>												
Adv West Midlands	-13.2%	-14.8%	-10.3%	70	-5.2%	2.8%	-6.7%	1038	-2.0%	6.2%	2.5%	1136
East of England	-14.0%	16.0%	8.0%	57	-13.3%	-10.5%	-4.6%	1223	-8.8%	-10.9%	-2.5%	1347
East Midlands	-9.1%	-21.6%	-10.1%	45	0.4%	2.3%	0.0%	1069	0.3%	5.5%	0.2%	1150
London	65.5%	78.6%	73.2%	125	10.7%	7.4%	14.1%	1464	10.1%	5.9%	12.6%	1582
North West	-13.7%	-12.5%	7.3%	109	-6.9%	-7.5%	-4.8%	1696	-3.8%	-3.6%	-2.3%	1841
ONE North East	-9.0%	77.9%	17.3%	24	-5.6%	-0.8%	3.0%	476	-8.1%	1.3%	3.7%	520
South East England	5.6%	12.5%	17.3%	128	-9.3%	-12.6%	-13.9%	2238	-8.0%	-10.4%	-12.6%	2409
South West	-9.2%	-9.7%	32.9%	117	-6.7%	-8.9%	-11.2%	2796	-5.9%	-8.1%	-10.8%	2974
Yorkshire Forward	-1.8%	-10.1%	8.7%	75	-5.1%	-11.8%	-5.0%	1417	-6.2%	-11.7%	-4.2%	1497
<b>LOCATION TYPE:</b>												
Seaside	-9.6%	-12.7%	34.7%	88	-10.7%	-14.0%	-11.0%	2929	-9.5%	-13.3%	-10.3%	3045
Large city/ large town	-4.5%	-1.7%	8.0%	367	-2.4%	-1.6%	1.1%	5151	-0.8%	1.2%	2.4%	5617
Small town	-0.2%	13.5%	26.7%	194	-1.8%	-4.4%	-4.8%	3027	-1.5%	-4.8%	-2.9%	3310
Countryside/ village	1.4%	4.1%	-9.2%	105	-9.2%	-6.1%	-11.1%	2386	-7.6%	-4.5%	-10.0%	2572
<b>AGE:</b>												
16-24	-9.3%	-4.5%	-7.5%	116	4.4%	10.2%	-5.2%	1652	0.5%	8.4%	-7.3%	1734
25-34	-4.0%	-2.7%	40.0%	123	-10.5%	-19.9%	-14.8%	2086	-7.7%	-17.1%	-12.2%	2267
35-44	-23.9%	-24.1%	-3.0%	127	-7.9%	-7.9%	-5.5%	2894	-6.5%	-7.4%	-3.6%	3084
45-54	43.4%	63.2%	28.8%	142	0.4%	-0.3%	-2.1%	2285	1.0%	1.4%	-2.3%	2461
55+	-2.8%	-0.5%	8.1%	237	-5.2%	-8.1%	-1.0%	4345	-2.3%	-5.8%	1.4%	4742
<b>SEG:</b>												
AB	-2.6%	6.0%	33.0%	243	0.0%	-2.0%	2.3%	4262	-0.1%	-2.9%	2.8%	4581
C1	3.7%	16.6%	7.5%	249	-6.7%	-11.3%	-10.7%	4113	-5.0%	-9.8%	-8.4%	4427
C2	-3.3%	-1.8%	-7.5%	122	-3.6%	0.1%	0.2%	2340	-3.2%	2.2%	0.3%	2499
DE	-18.8%	-28.6%	-17.7%	131	-12.6%	-14.5%	-18.5%	2505	-8.2%	-9.4%	-15.9%	2742
<b>CHILDREN IN HH:</b>												
Any	-17.3%	-18.5%	-14.6%	202	-1.0%	-4.1%	-2.4%	4947	-0.3%	-3.5%	-2.4%	5194
None	2.5%	7.4%	22.5%	538	-6.3%	-8.0%	-6.0%	8389	-4.8%	-6.2%	-4.2%	9070
<b>ACCOMMODATION:</b>												
Commercial accom	-2.7%	-7.9%	12.4%	408	-3.2%	-6.9%	-3.9%	7816	-2.4%	-6.3%	-2.7%	8105
- Serviced accom	2.5%	0.3%	19.7%	354	-0.7%	-3.5%	-3.0%	5212	0.1%	-3.0%	-1.7%	5480
- Hotel/motel/guesthouse	2.3%	-1.3%	19.3%	321	-0.7%	-4.1%	-2.6%	4607	0.4%	-3.1%	-1.1%	4870
- Bed & Breakfast	0.0%	15.8%	24.4%	33	-2.2%	0.0%	-6.1%	620	-3.8%	-2.0%	-6.8%	624
Total self-catering rented	-17.9%	-12.2%	14.8%	41	-7.3%	-9.0%	-4.0%	2408	-6.8%	-8.7%	-3.7%	2413
- Camping & Caravanning (inc. owned caravans)	-18.9%	-4.0%	3									