

## UK TOURISM SURVEY - October 2009 SUMMARY OF RESULTS

### 1. Headlines

- During the month of October, domestic tourism trips in the UK grew by 8% compared to October 2008.
- The number of bednights increased by 8% and total expenditure rose by 7%.
- Within England, trips and spend both increased by 11% while nights were up by 12%.
- In the first ten months of 2009, overall trip numbers increased by 7% and spend also increased (+4%).
- In the past 12 months, 124.4 million overnight trips were taken in the UK, 3.8 million more than in the 12 months from September 2007 to October 2008, an increase of 3%.

### 2. Trip Characteristics

- Although in 2009 to date the number of trips has increased overall (+7%) this growth has been driven by the considerable growth in "pure holiday" trips between January and October (up by +17% in the UK and +18% in England). This trend towards holidaying domestically continued in October with "pure holiday" trips up by 15% in the UK and 18% in England.
- The increase in holiday trips has come from both longer and shorter breaks, with 1-3 and 4+ night holidays recording double-digit growth.
- Meanwhile, business trips have decreased (-6% in the UK and -6% in England) in the first ten months of 2009. However, there are signs that the business market is starting to stabilise, with a decline of only 1% in October after a marginal (+2%) increase in September.
- The number of visits to friends and family is unchanged in the UK vs. Jan-Oct 2008 and increased only marginally (+2%) in England, and October reflected this stability (+0% in the UK and +1% in England).
- During the first ten months of the year, seaside locations benefited most from the growth in domestic tourism (+17%) and trips to the UK countryside have also shown a marked increase (+11%). However, when looking specifically at the month of October, in contrast to the year-to-date picture, it is large cities/towns and countryside locations that have driven the increase.
- As a consequence of the growth of domestic holidays, the self-catering sector experienced a 25% increase in trips while serviced accommodation rose by only 5% between January-October 2009 probably due to the drop in business travel. This pattern continued in the month of October (self-catering up 29% and serviced up 4%).

### 3. Overseas Travel by UK Residents

- In October, UK residents made 13% fewer trips abroad than in October 2008 but spent 9% less. From January – October 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 47% for the month of October (1% higher than in October '08).

## KEY MEASURES



### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
<b>October '09</b>									
UK	10.0	10.8	+8%	27.9	30.1	+8%	£1,712	£1,836	+7%
England	8.1	9.0	+11%	21.8	24.4	+12%	£1,323	£1,474	+11%
<b>Jan – Oct'09</b>									
UK	101.4	108.0	+7%	332.6	350.9	+6%	£18,571	£19,246	+4%
England	81.8	87.7	+7%	258.8	273.0	+6%	£14,431	£15,088	+5%

### Purpose of Trip – October 2009

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
<b>UK</b>									
Holiday	4.5	5.1	+15%	13.9	15.8	+14%	£896	£1,013	+13%
Business	1.4	1.4	-1%	3.5	3.4	-4%	£352	£376	+7%
VFR	3.9	3.9	0%	10.0	10.1	0%	£433	£398	-8%
<b>England</b>									
Holiday	3.4	4.1	+18%	10.3	12.4	+20%	£688	£774	+13%
Business	1.1	1.2	+9%	2.7	3.0	+12%	£261	£330	+26%
VFR	3.4	3.4	+1%	8.4	8.3	-1%	£348	£333	-4%

### Purpose of Trip – Year to Date (January – October 2009)

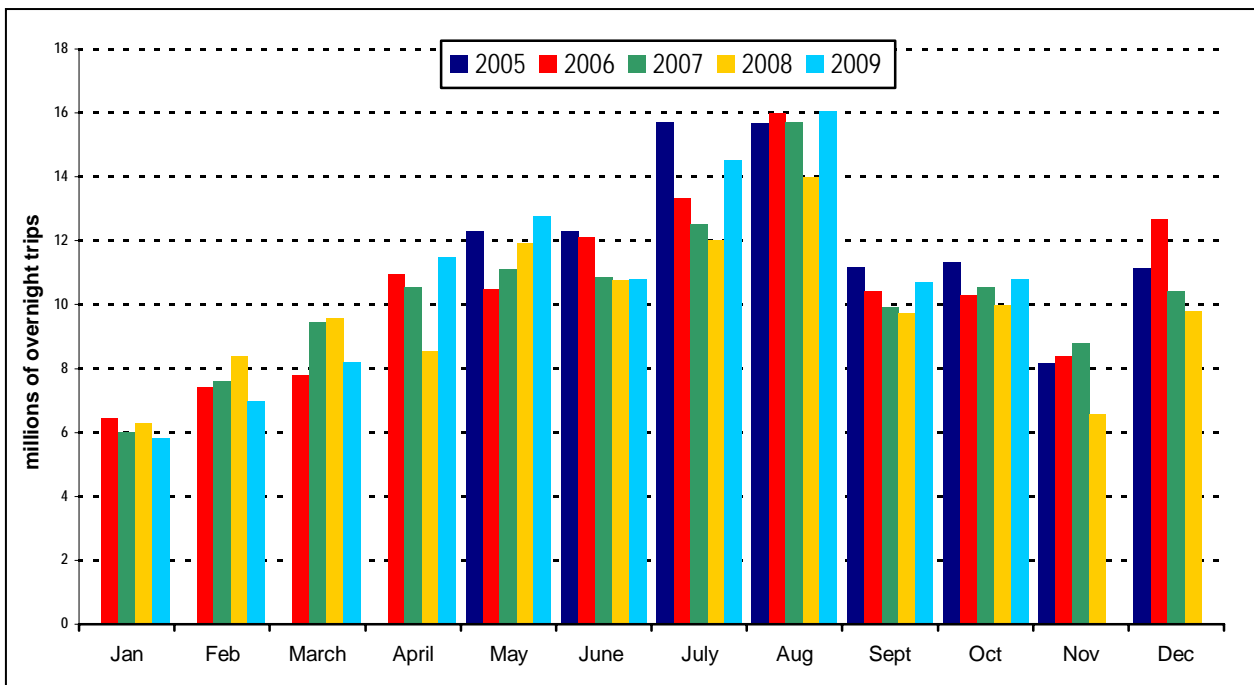
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
<b>UK</b>									
Holiday	47.0	55.1	+17%	179.2	207.8	+16%	£10,273	£11,460	+12%
Business	15.9	14.9	-6%	38.1	36.1	-5%	£3,958	£3,683	-7%
VFR	35.4	35.5	+0%	102.2	99.5	-3%	£3,923	£3,736	-5%
<b>England</b>									
Holiday	36.1	42.7	+18%	132.1	157.4	+19%	£7,814	£8,784	+12%
Business	13.3	12.4	-6%	31.0	29.1	-6%	£3,151	£2,974	-6%
VFR	29.9	30.4	+2%	84.6	80.7	-5%	£3,138	£3,033	-3%

### Outbound Travel – UK Residents

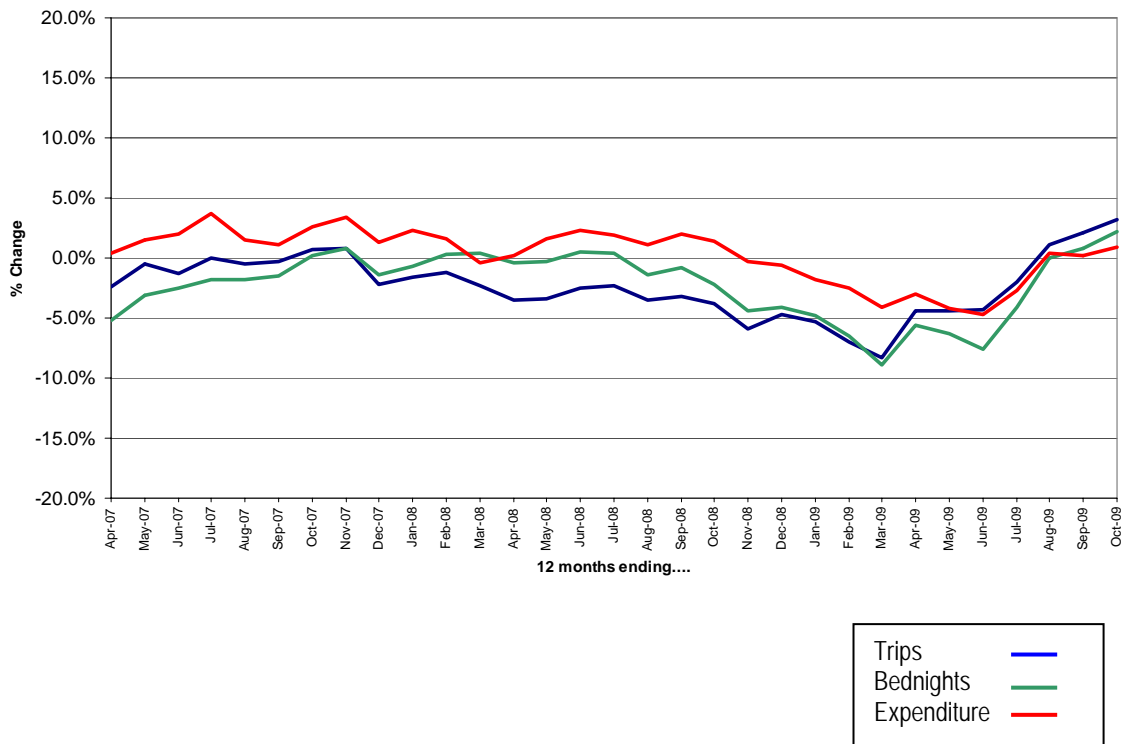
	TRIPS (MILLIONS)			SPEND (£BN)		
	2008	2009	% +/-	2008	2009	% +/-
October 2009	5.8	5.1	-13%	2.9	2.7	-9%
Jan – Oct '09	61.2	51.9	-15%	32.8	28.3	-14%
Nov '08 – Oct '09	69.6	59.7	-14%	36.8	32.4	-12%

## 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 (October 2008 vs October 2009)
- Year to date (January – October 2008 vs January – October 2009)
- 12 months (November 2007 – October 2008 vs November 2008 – October 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.

