

UK TOURISM SURVEY – OCTOBER 2010 SUMMARY OF RESULTS

1. Headlines

- During the month of October, the number of domestic overnight tourism trips made in the UK decreased by 4% compared with October 2009.
- Similarly, the total number of bednights made in the month fell (by -4%). At the same time, spend was unchanged.
- Within England, the number of trips taken dropped by 6% while bednights (-7%) were also down on 2009 levels. Expenditure in England also fell during the month (by -4%).
- Between January and October, the volume of overnight trips taken in the UK fell 4% when compared with the first ten months of 2009, with 6% fewer bednights and a 5% decrease in spend.
- Within England, trip volumes fell by 5% while bednights and spend were down by 7% and 6% respectively when compared to January-October 2009.
- In the past 12 months 121.811 million overnight trips were taken in the UK, 2 % fewer than in the 12 months between November '08 and October '09 but 1% more were taken than during the November '07 – October '08 period.

2. Trip Characteristics

- During the first ten months of the year, volumes declined by all trip purposes; business trips were down -5% and spend dropped by -11%, at the same time visits to friends and family decreased by -2% (while spend fell -4%) and there were 6% fewer holiday trips with a 4% reduction in spend compared to the same period in 2009.
- However, when looking specifically at the month of October, in contrast to the year-to-date picture, business trips increased slightly (by 3%) although spend continued to be well below 2009 levels (-6%). During the month, visits to friends and family were noticeably down (-8%) and “pure holiday” trips were down 4% on the same month in 2009.
- Trips taken by the least affluent DE social grade declined by 12% in the first ten months of 2010 with their spend decreasing by 18%. This trend was reflected in the month of October with DE trip volumes and spend declining by 13% and 22% respectively. Meanwhile the number of trips taken by ABs rose by 1% between January and October with spend slightly lower (-1%) while in the month of October trips by ABs increased by 6% and their expenditure grew by 8%.

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 September results for the past four years.
- This shows very different trends by trip purpose. The number of holiday trips taken in October 2009 were 15% higher than in 2008, 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, with the ten month volume and value totals at their lowest level since the current survey began.

4. Overseas Travel by UK Residents

- Travel abroad by British residents declined in 2009 and has continued to do so in 2010, with 8% fewer trips taken between January and October this year and a 5% reduction in expenditure.

UK TOURISM SURVEY – OCTOBER 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	% +/-
October '10									
UK	10.7	10.3	-4%	29.6	28.4	-4%	1,817	1,815	0%
England	8.9	8.4	-6%	24.0	22.2	-7%	1,459	1,400	-4%
Jan – Oct'10									
UK	107.9	103.8	-4%	350.4	328.4	-6%	19,228	18,238	-5%
England	87.6	83.4	-5%	272.6	252.7	-7%	15,073	14,149	-6%

Purpose of Trip – October 2010

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	5.1	4.9	-4%	15.6	15.3	-2%	1,001	1,014	1%
Business	1.5	1.5	3%	3.3	3.2	-3%	374	353	-6%
VFR	3.9	3.6	-8%	9.9	9.0	-9%	394	403	2%
England									
Holiday	4.0	3.9	-3%	12.2	11.8	-3%	765	762	0%
Business	1.2	1.2	-2%	2.9	2.8	-7%	328	294	-10%
VFR	3.4	3.1	-9%	8.2	7.1	-13%	329	323	-2%

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

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2009	2010	% +/-	2009	2010	% +/-	2009	2010	% +/-
UK									
Holiday	55.0	51.9	-6%	207.6	190.7	-8%	11,448	10,978	-4%
Business	14.9	14.0	-5%	36.0	32.8	-9%	3,681	3,259	-11%
VFR	35.5	34.9	-2%	99.3	96.7	-3%	3,731	3,594	-4%
England									
Holiday	42.7	40.1	-6%	157.2	143.7	-9%	8,775	8,362	-5%
Business	14.9	14.1	-9%	29.1	25.2	-13%	2,972	2,574	-13%
VFR	35.5	34.9	-2%	80.6	77.9	-3%	3,029	2,892	-5%

Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2009	2010	% +/-	2009	2010	% +/-
October 2010	5.0	5.1	-2%	2.6	2.7	0%
Jan – Oct '10	52.0	49.0	-8%	28.3	27.7	-5%
Nov '09 – Oct '10	59.8	55.6	-7%	36.8	31.7	-14%

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
October '10												
UK	10.5	10.0	10.7	10.3	31.4	27.9	29.6	28.4	1,736	1,712	1,817	1,815
England	8.5	8.1	8.9	8.4	25.0	21.8	24.0	22.2	1,363	1,323	1,459	1,400
Jan – October'10												
UK	104.3	101.4	108.0	103.8	339.0	332.6	350.4	328.4	18,219	18,571	19,228	18,238
England	84.5	81.8	87.6	83.4	264.5	258.8	272.6	252.7	14,138	14,431	15,073	14,149

Purpose of Trip – October 2010

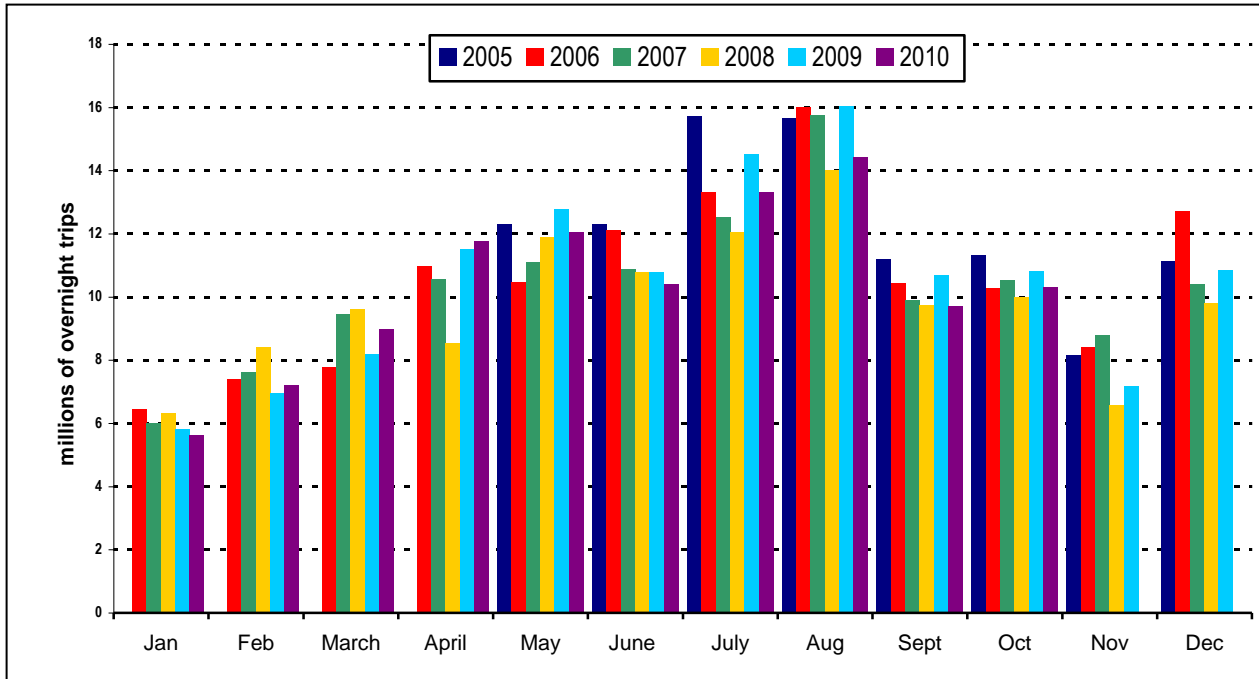
	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
UK												
Holiday	4.7	4.5	5.1	4.9	15.8	13.9	15.6	15.3	909	896	1,001	1014.0
Business	1.6	1.4	1.5	1.5	3.7	3.5	3.3	3.2	333	352	374	353.0
VFR	4.0	3.9	3.9	3.6	10.6	10.0	9.9	9.0	460	433	394	403.0
England												
Holiday	3.6	3.4	4.0	3.9	11.8	10.3	12.2	11.8	697	688	765	762.0
Business	1.4	1.1	1.2	1.2	3.0	2.7	2.9	2.8	266	261	328	294.0
VFR	3.4	3.4	3.4	3.1	8.9	8.4	8.2	7.1	373	348	329	323.0

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

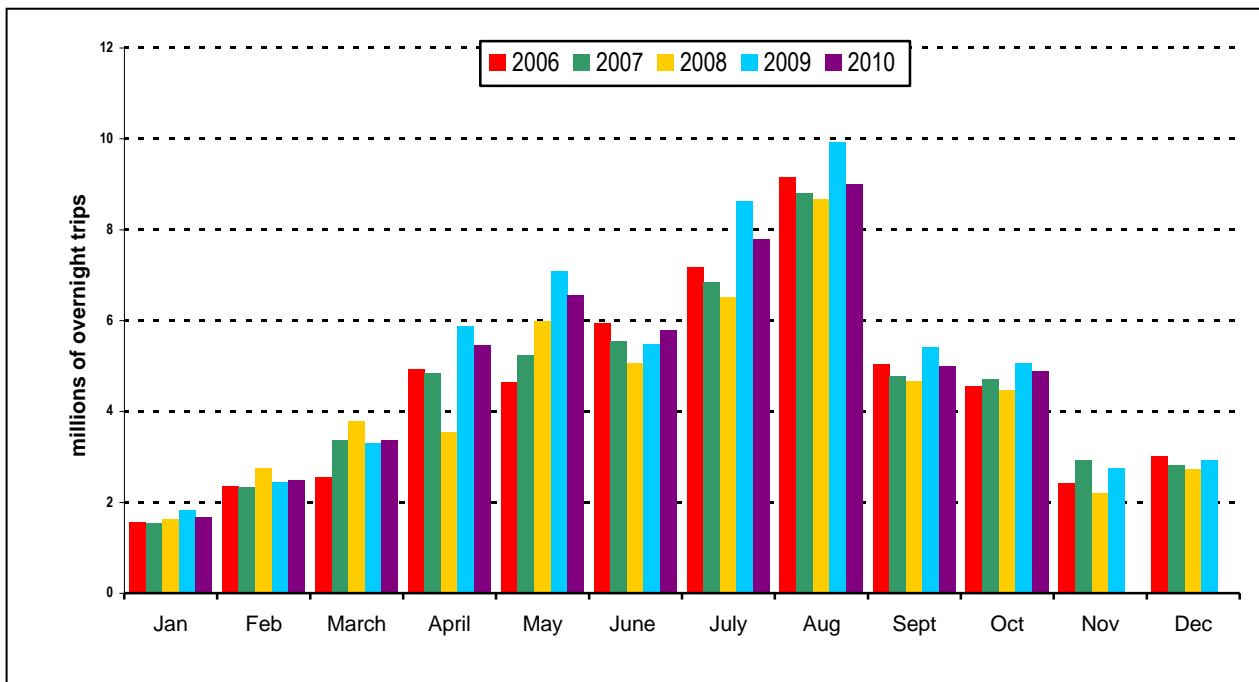
	TRIPS (MILLIONS)				NIGHTS (MILLIONS)				SPEND (£M)			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
UK												
Holiday	48.0	47.0	55.0	51.9	186.6	179.2	207.6	190.7	10182.0	10273.0	11448.0	10978.0
Business	16.1	15.9	14.9	14.1	38.1	38.1	36.0	32.8	3805.0	3958.0	3681.0	3259.0
VFR	37.5	35.4	35.5	34.9	105.0	102.2	99.3	96.7	3823.0	3923.0	3731.0	3594.0
England												
Holiday	37.1	36.1	42.7	40.1	139.3	132.1	157.2	143.7	7775.0	7814.0	8775.0	8362.0
Business	13.3	13.3	12.4	11.3	30.5	31.0	29.1	25.2	2974.0	3151.0	2972.0	2574.0
VFR	31.9	29.9	30.4	29.6	87.2	84.6	80.6	77.9	3084.0	3138.0	3029.0	2892.0

TREND CHARTS

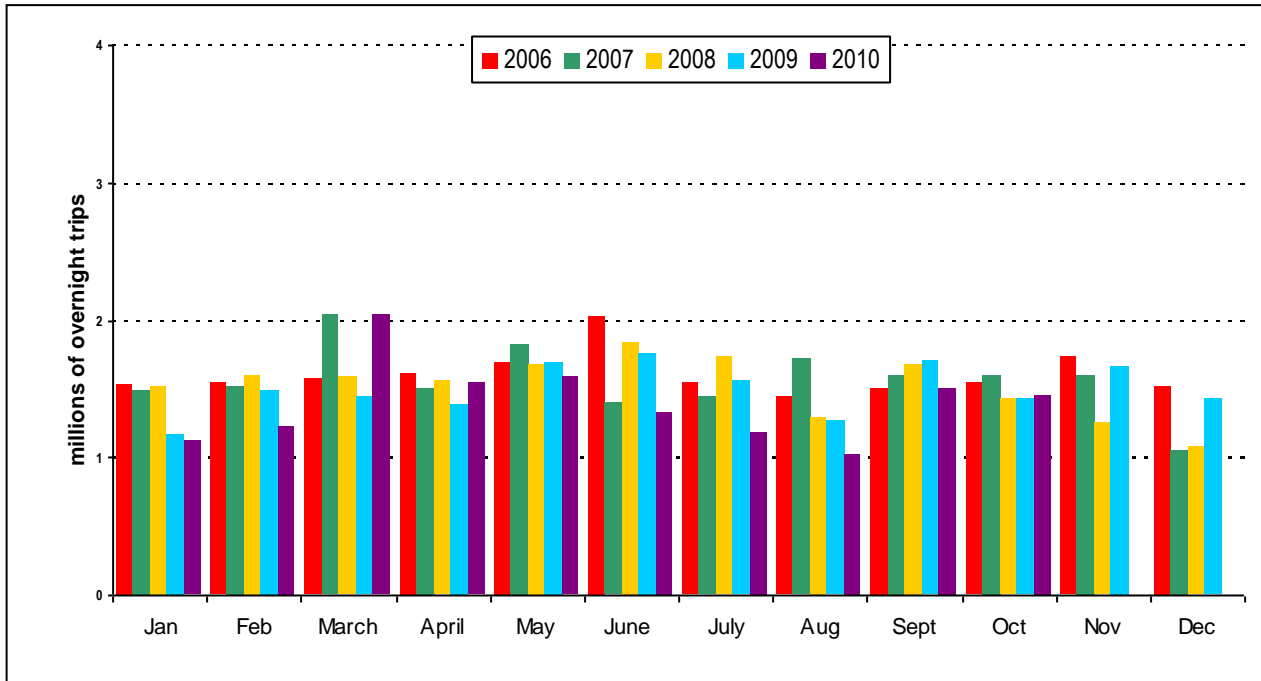
UK All Trips – Domestic Trip Volume by Month



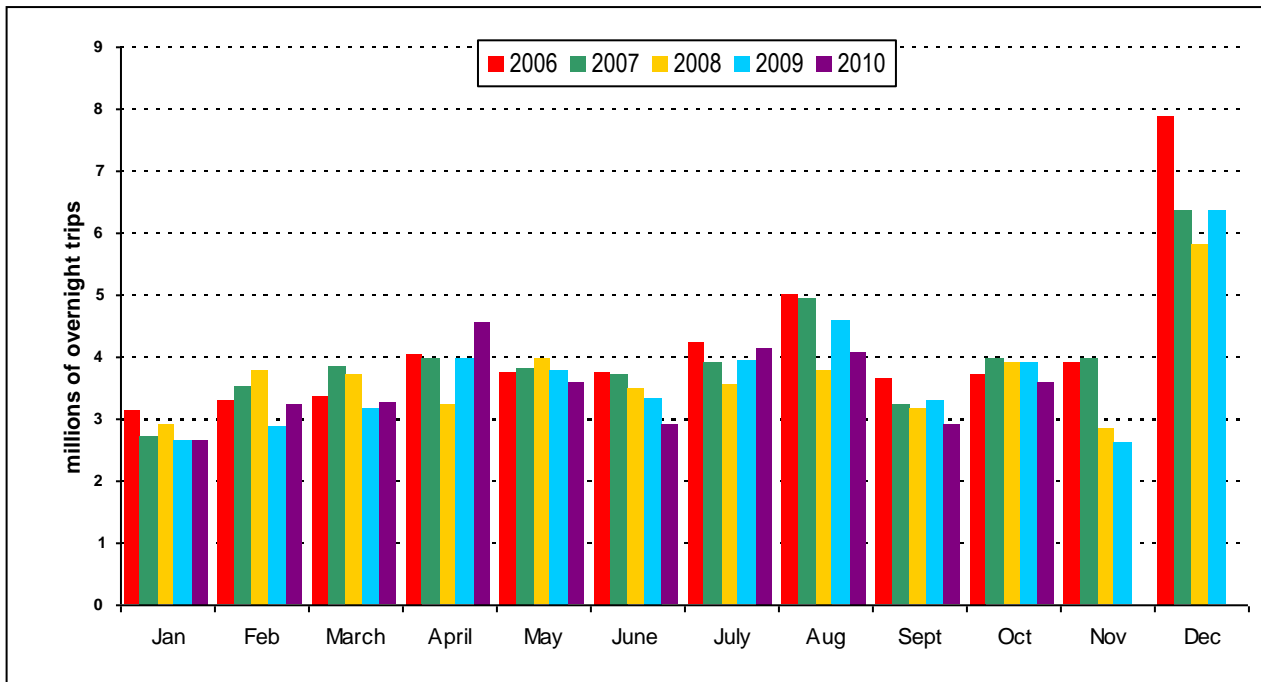
UK Holiday Trips – Domestic Trip Volume by Month



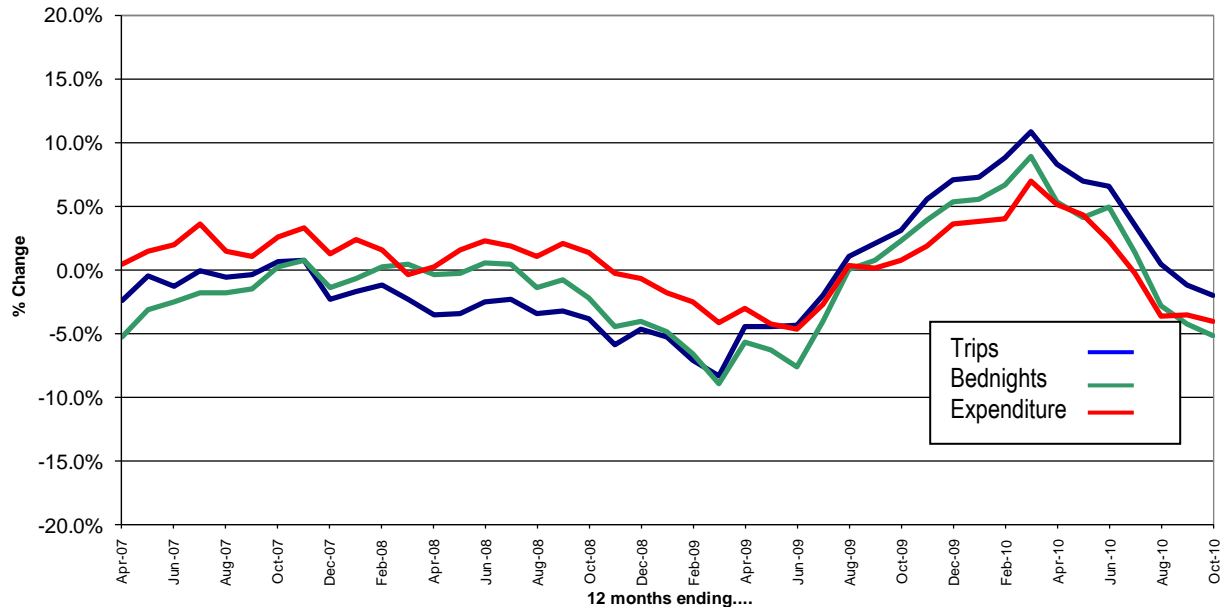
UK Business Trips – Domestic Trip Volume by Month



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 (October 2009 vs October 2010)
- Year to date (January – October 2009 vs January – October 2010)
- 12 months (November 2008 – October 2009 vs November 2009 – October 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											
	Month: October 2010			Unweighted Trips	YTD: January - October 2010			Unweighted Trips	Month rolling November 2009 - October 2010			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-3.7%	-4.1%	-0.1%	1490	-3.9%	-6.3%	-5.1%	15541	-2.0%	-5.0%	-4.0%	17589
PURPOSE:												
Pure Holiday	-3.6%	-2.1%	1.3%	740	-5.6%	-8.2%	-4.1%	8010	-4.0%	-7.2%	-3.4%	8699
- 1-3 nights holiday	-5.6%	-4.0%	2.8%	489	-4.5%	-6.8%	0.7%	4747	-2.1%	-2.1%	1.4%	5258
- 4+ nights holiday	1.1%	-0.5%	-1.0%	251	-7.4%	-11.2%	-8.4%	3263	-7.0%	-9.7%	-7.9%	3441
VFR (on holiday)	-13.2%	-15.8%	-11.4%	252	-2.8%	-7.0%	-3.4%	2819	-1.9%	-5.8%	-4.3%	3471
HOLIDAY (TOTAL)	-6.2%	-5.5%	-1.0%	992	-4.9%	-7.9%	-4.0%	10829	-3.4%	-6.9%	-3.5%	12170
VFR (non-holiday)	-2.9%	-2.4%	19.5%	277	-0.4%	4.0%	-4.1%	2549	0.6%	5.2%	-3.9%	3033
VFR (TOTAL)	-8.0%	-9.4%	2.3%	529	-1.7%	-2.6%	-3.7%	5369	-0.7%	-1.5%	-4.1%	6504
Business	2.5%	-2.7%	-5.6%	174	-5.4%	-9.0%	-11.5%	1751	-0.1%	-5.8%	-7.0%	2037
RDAs:												
Adv West Midlands	-16.8%	-18.8%	-18.2%	82	-4.6%	2.1%	-4.4%	967	1.4%	8.1%	8.3%	1142
East of England	-12.9%	-4.8%	-23.4%	115	-13.2%	-11.6%	-5.0%	1166	-6.1%	-10.8%	-1.2%	1368
East Midlands	-20.8%	-14.1%	6.5%	83	0.9%	3.3%	2.7%	1024	0.3%	5.4%	1.2%	1146
London	5.8%	0.4%	37.4%	142	6.9%	3.3%	9.8%	1340	5.4%	0.2%	8.0%	1545
North West	-4.9%	7.3%	12.7%	171	-6.3%	-7.2%	-5.7%	1587	-0.5%	-2.2%	-3.4%	1871
ONE North East	63.4%	72.4%	32.1%	60	-5.3%	-3.9%	2.3%	452	-10.2%	-2.9%	-2.7%	522
South East England	-25.7%	-33.6%	-47.6%	188	-10.3%	-13.9%	-15.6%	2110	-8.5%	-10.9%	-13.9%	2417
South West	-0.6%	-6.3%	-11.9%	257	-6.6%	-8.9%	-13.0%	2679	-4.9%	-7.5%	-11.3%	2985
Yorkshire Forward	12.4%	1.4%	44.2%	129	-2.7%	-10.3%	-4.9%	1342	-2.1%	-8.9%	-3.5%	1531
LOCATION TYPE:												
Seaside	3.9%	-1.5%	9.7%	343	-9.3%	-11.6%	-11.5%	3644	-7.3%	-10.4%	-10.5%	3916
Large city/ large town	-8.6%	-10.9%	-3.4%	564	-2.9%	-2.9%	-1.1%	5639	-0.7%	-0.3%	-0.2%	6630
Small town	3.0%	3.7%	5.1%	345	-0.2%	-2.1%	-1.4%	3616	0.6%	-3.2%	-0.2%	4180
Countryside/ village	-4.7%	-4.5%	-7.2%	275	-7.2%	-7.5%	-9.1%	2982	-5.2%	-6.3%	-8.5%	3320
AGE:												
16-24	4.1%	12.9%	-11.2%	183	2.2%	9.2%	-4.1%	1822	-0.8%	5.0%	-6.8%	2067
25-34	-12.4%	-25.3%	0.0%	225	-9.5%	-28.2%	-17.5%	2413	-4.7%	-26.6%	-13.7%	2796
35-44	-1.1%	12.1%	-3.6%	342	-5.3%	-6.1%	-3.9%	3485	-2.6%	-4.9%	-2.1%	3917
45-54	6.1%	7.8%	11.8%	266	-0.4%	-4.3%	-3.7%	2756	0.1%	-2.8%	-4.1%	3089
55+	-9.6%	-19.2%	-0.8%	474	-4.0%	-6.8%	-0.5%	5065	-1.7%	-5.5%	0.8%	5819
SEG:												
AB	5.7%	1.4%	8.3%	502	0.7%	-3.1%	-1.2%	4941	1.2%	-4.4%	-1.5%	5621
C1	-7.9%	-7.5%	-10.1%	451	-7.6%	-12.4%	-10.5%	4745	-4.6%	-10.2%	-6.9%	5421
C2	-7.4%	14.4%	18.3%	246	0.5%	5.9%	7.7%	2837	0.2%	5.8%	4.5%	3177
DE	-13.4%	-25.0%	-21.7%	291	-11.5%	-13.0%	-18.3%	3018	-6.6%	-7.4%	-14.8%	3469
CHILDREN IN HH:												
Any	7.7%	15.3%	9.7%	568	1.2%	-3.2%	0.8%	5824	2.8%	-2.4%	-0.1%	6522
None	-8.6%	-12.1%	-3.6%	922	-6.3%	-7.9%	-7.5%	9716	-4.2%	-6.3%	-5.6%	11167
ACCOMMODATION:												
Commercial accom	0.1%	1.5%	2.3%	893	-2.4%	-5.1%	-3.6%	9329	-1.0%	-4.5%	-2.4%	10178
- Serviced accom	0.5%	-0.3%	2.6%	615	-0.2%	-2.3%	-3.5%	5999	0.9%	-2.0%	-2.4%	6743
- Hotel/motel/guesthouse	0.6%	-1.5%	-1.9%	541	0.3%	-2.0%	-3.1%	5273	1.7%	-1.2%	-1.7%	5973
- Bed & Breakfast	5.1%	6.9%	40.6%	81	-4.5%	-3.6%	-6.6%	752	-5.6%	-6.4%	-7.8%	798
Total self-catering rented	-0.3%	3.5%	3.5%	250	-5.4%	-5.9%	-2.2%	3094	-4.0%	-5.1%	-1.2%	3156
- Camping & Caravanning (inc. owned caravans)	1.6%	2.2%	-11.5%	181	-7.6%	-7.4%	-8.0%	2434	-6.3%	-6.7%	-7.3%	2437
- Other self-catering rented	7.3%	10.0%	7.8%	126	-4.7%	-7.1%	-0.5%	1164	-2.9%	-6.1%	0.6%	1228
Hostels	33.1%	29.0%	-11.8%	24	7.7%	-0.5%	-6.2%	205	11.1%	-0.2%	1.6%	232
Own home/friends'/relatives'	-11.6%	-10.7%	-16.5%	565	-7.3%	-8.8%	-11.9%	5973	-4.6%	-6.8%	-10.3%	7232

Comparisons with equivalent periods, 2009

	England											
	Month: October 2010			Unweighted Trips	YTD: January - October 2010			Unweighted Trips	Month rolling November 2009 - October 2010			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	-5.5%	-7.5%	-4.0%	1213	-4.8%	-7.3%	-6.1%	12494	-2.5%	-5.2%	-4.2%	14346
PURPOSE:												
Pure Holiday	-3.5%	-3.4%	-0.4%	590	-6.0%	-8.6%	-4.7%	6187	-4.0%	-7.1%	-3.0%	6759
- 1-3 nights holiday	-4.8%	-3.4%	6.9%	395	-4.7%	-16.5%	0.5%	3705	-2.2%	-1.5%	1.9%	4130
- 4+ nights holiday	-0.5%	-3.4%	-11.6%	195	-8.1%	-19.6%	-9.5%	2477	-7.0%	-9.9%	-7.8%	2622
VFR (on holiday)	-13.9%	-20.9%	-13.8%	203	-5.8%	-7.9%	-7.0%	2313	-3.6%	-4.6%	-4.6%	2873
HOLIDAY (TOTAL)	-6.4%	-7.8%	-2.9%	793	-6.0%	-8.5%	-5.1%	8499	-3.9%	-6.4%	-3.3%	9633
VFR (non-holiday)	-4.4%	-4.7%	11.6%	249	1.0%	3.1%	-1.3%	2242	1.7%	4.7%	-3.0%	2680
VFR (TOTAL)	-8.8%	-12.8%	-1.8%	452	-2.5%	-3.4%	-4.5%	4558	-1.1%	-0.8%	-3.9%	5555
Business	-2.4%	-6.6%	-10.4%	143	-8.6%	-13.2%	-13.4%	1414	-2.7%	-9.5%	-8.7%	1658
RDAs:												
Adv West Midlands	-16.8%	-18.8%	-18.2%	82	-4.6%	2.1%	-4.4%	957	1.4%	8.1%	8.3%	1142
East of England	-12.9%	-4.8%	-23.4%	115	-13.2%	-11.6%	-5.0%	1166	-6.1%	-10.8%	-1.2%	1368
East Midlands	-20.8%	-14.1%	6.5%	83	0.9%	3.3%	2.7%	1024	0.3%	5.4%	1.2%	1146
London	5.8%	0.4%	37.4%	142	6.9%	3.3%	9.8%	1340	5.4%	0.2%	8.0%	1545
North West	-4.9%	7.3%	12.7%	171	-6.3%	-7.2%	-5.7%	1587	-0.5%	-2.2%	-3.4%	1871
ONE North East	63.4%	72.4%	32.1%	60	-5.3%	-3.9%	2.3%	452	-10.2%	-2.9%	-2.7%	522
South East England	-25.7%	-33.6%	-47.6%	188	-10.3%	-13.9%	-15.6%	2110	-8.5%	-10.9%	-13.9%	2417
South West	-0.6%	-6.3%	-11.9%	257	-6.6%	-8.9%	-13.0%	2679	-4.9%	-7.5%	-11.3%	2985
Yorkshire Forward	12.4%	1.4%	44.2%	129	-2.7%	-10.3%	-4.9%	1342	-2.1%	-8.9%	-3.5%	1531
LOCATION TYPE:												
Seaside	-0.2%	-3.0%	0.7%	285	-10.8%	-14.1%	-12.4%	2839	-9.1%	-12.9%	-11.4%	3057
Large city/ large town	-8.8%	-11.3%	-8.7%	478	-2.2%	-1.6%	0.5%	4785	0.2%	1.6%	2.1%	5654
Small town	-0.2%	-2.9%	1.5%	268	-2.0%	-6.2%	-7.0%	2829	0.2%	-4.9%	-3.9%	3326
Countryside/ village	-8.8%	-10.7%	-1.7%	208	-9.7%	-6.5%	-11.2%	2279	-7.4%	-5.2%	-9.9%	2577
AGE:												
16-24	6.2%	6.2%	-14.3%	156	5.7%	11.2%	-5.0%	1536	1.6%	8.4%	-7.5%	1745
25-34	-16.8%	-16.7%	-1.0%	179	-10.9%	-20.9%	-18.1%	1961	-6.2%	-16.3%	-13.6%	2277
35-44	-0.8%	8.5%	-8.8%	291	-6.8%	-7.8%	-5.7%	2758	-3.8%	-5.8%	-3.1%	3132
45-54	0.6%	1.0%	8.5%	209	-1.9%	-2.7%	-4.0%	2141	-0.8%	-0.7%	-3.7%	2423
55+	-11.4%	-20.9%	-5.9%	378	-5.4%	-8.5%	-1.5%	4105	-2.0%	-6.1%	0.9%	4779
SEG:												
AB	6.6%	2.5%	7.2%	417	0.2%	-2.4%	0.3%	4020	1.2%	-3.4%	1.3%	4618
C1	-7.7%	-8.5%	-15.1%	370	-7.4%	-12.6%	-11.9%	3862	-4.7%	-10.2%	-8.0%	4425
C2	-15.4%	1.3%	3.0%	194	-3.6%	-0.7%	0.6%	2215	-2.9%	1.5%	-0.6%	2511
DE	-18.7%	-31.1%	-17.4%	228	-12.2%	-13.7%	-18.5%	2372	-6.3%	-6.5%	-15.6%	2764
CHILDREN IN HH:												
Any	5.5%	10.5%	5.9%	473	-0.1%	-4.0%	-1.8%	4644	1.7%	-2.8%	-1.0%	5244
None	-10.5%	-15.3%	-7.5%	742	-7.0%	-8.9%	-7.9%	7844	-4.4%	-6.3%	-5.5%	9095
ACCOMMODATION:												
Commercial accom	-1.1%	-1.7%	-1.5%	724	-3.2%	-7.1%	-4.9%	7413	-1.3%	-5.8%	-3.0%	8138
- Serviced accom	-1.6%	-6.7%	-3.7%	493	-1.0%	-4.4%	-4.8%	4845	0.8%	-3.0%	-2.9%	5483
- Hotel/motel/guesthouse	-0.4%	-5.8%	-5.4%	440	-1.0%	-5.0%	-4.5%	4272	1.1%	-3.1%	-2.2%	4873
- Bed & Breakfast	-9.8%	-11.9%	10.7%	56	-2.3%	-0.8%	-7.5%	588	-3.2%	-2.6%	-8.2%	626
Total self-catering rented	-0.4%	3.5%	7.9%	203	-6.7%	-8.5%	-3.8%	2387	-5.3%	-7.7%	-2.6%	2438
- Camping & Caravanning (inc. owned caravans)	-10.9%	-6.8%	-18.3%	134	-11.6%	-12.9%	-15.8%					