

## UK TOURISM SURVEY - September 2009 SUMMARY OF RESULTS

### 1. Headlines

- During the month of September, domestic tourism trips in the UK grew by 10% compared to September 2008.
- The number of bednights increased by 9% and total expenditure rose very slightly (+1%).
- Within England, trips increased by 7% while nights were up by 4% but spend fell by -2%.
- In the first nine months of this year, overall trip numbers increased by 6% and spend also increased (+3%).
- In the past 12 months, 123.6 million overnight trips were taken in the UK, 2.5 million more than in the 12 months from August 2007 to September 2008, an increase of 2%.

### 2. Trip Characteristics

- Although in 2009 the number of trips has increased overall (+6%) this growth has been achieved through "pure holiday" trips which rose considerably between January and September (by +17% in the UK and +18% in England). This trend continued in September with "pure holiday" trips up by 16% in the UK and 15% in England.
- Meanwhile, business trips have decreased (-7% in the UK and -8% in England) in the first three quarters of 2009. On a positive note the number of business trips for the month of September rose by +2%.
- The number of visits to friends and family is unchanged in the UK and increased only marginally (+2%) in England, and September reflected this stability (+4% in the UK though -2% in England).
- Reflecting the increased number of holiday trips, seaside locations have grown considerably since the start of the year (+20% growth in trips) while the countryside has also benefited (+10% increase in trips). Interestingly, in the month of September, growth to countryside locations outstripped seaside growth (+32% growth in countryside trips vs. 11% increase in seaside trips).
- Within accommodation, the self-catering sector continued to grow (+25%) while serviced accommodation increased by a more modest 6% overall in the first nine months of 2009, likely to reflect the continued downturn in business travel.

### 3. Overseas Travel by UK Residents

- In September, UK residents made 9% fewer trips abroad than in September 2008 but spent 18% less. From January – September 2009, trips were down by 15%, with spend down 18%.

### 4. Other Tourism Surveys

- The Quarter 3 England Attractions Monitor found that visits to English visitor attractions were up by 6% for the month of September.
- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 51% for the month of September (1% higher than in September '08).

## KEY MEASURES



### Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
<b>September '09</b>									
UK	9.7	10.7	+10%	30.1	32.7	+9%	£1,871	£1,887	+1%
England	8.0	8.5	+7%	24.4	25.4	+4%	£1,487	£1,464	-2%
<b>Jan – Sep'09</b>									
UK	91.4	97.3	+6%	304.7	320.7	+5%	£16,859	£17,410	+3%
England	73.7	78.7	+7%	237.1	248.7	+5%	£13,108	£13,614	+4%

### Purpose of Trip – September 2009

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
<b>UK</b>									
Holiday	4.7	5.4	+16%	16.9	19.5	+16%	1,034	1,093	+6%
Business	1.7	1.7	+2%	4.2	3.7	-11%	442	411	-7%
VFR	3.2	3.3	+4%	8.2	8.7	+6%	361	345	-4%
<b>England</b>									
Holiday	3.6	4.1	+15%	13.2	15.0	+14%	796	843	+6%
Business	1.4	1.4	+0.4%	3.4	2.9	-15%	349	320	-8%
VFR	2.8	2.8	-1%	7.2	7.0	-3%	323	276	-15%

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

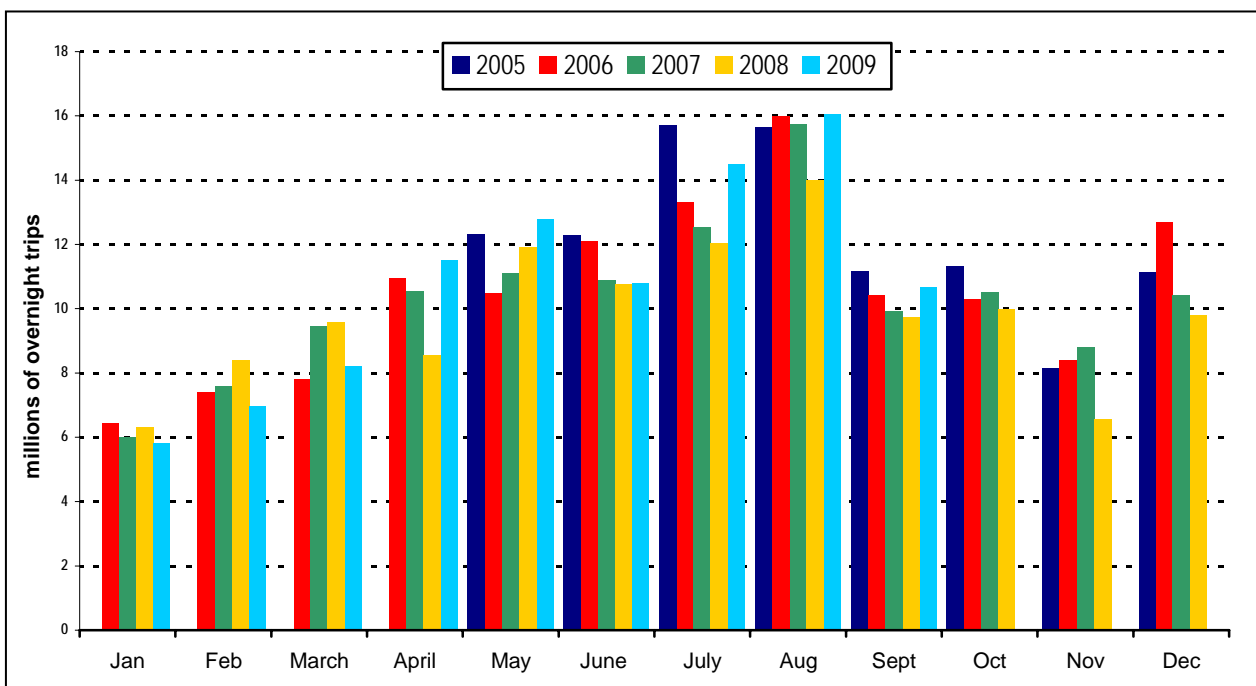
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
<b>UK</b>									
Holiday	42.6	49.9	+17%	165.3	192.0	+16%	9,377	10,447	+11%
Business	14.4	13.4	-7%	34.5	32.7	-5%	3,606	3,307	-8%
VFR	31.5	31.6	+0%	92.2	89.3	-3%	3,490	3,337	-4%
<b>England</b>									
Holiday	32.7	38.6	+18%	121.8	145.0	+19%	7,127	8,010	+12%
Business	12.1	11.2	-8%	28.3	26.1	-8%	2,890	2,644	-9%
VFR	26.6	27.0	+2%	76.2	72.4	-5%	2,790	2,700	-3%

### Outbound Travel – UK Residents

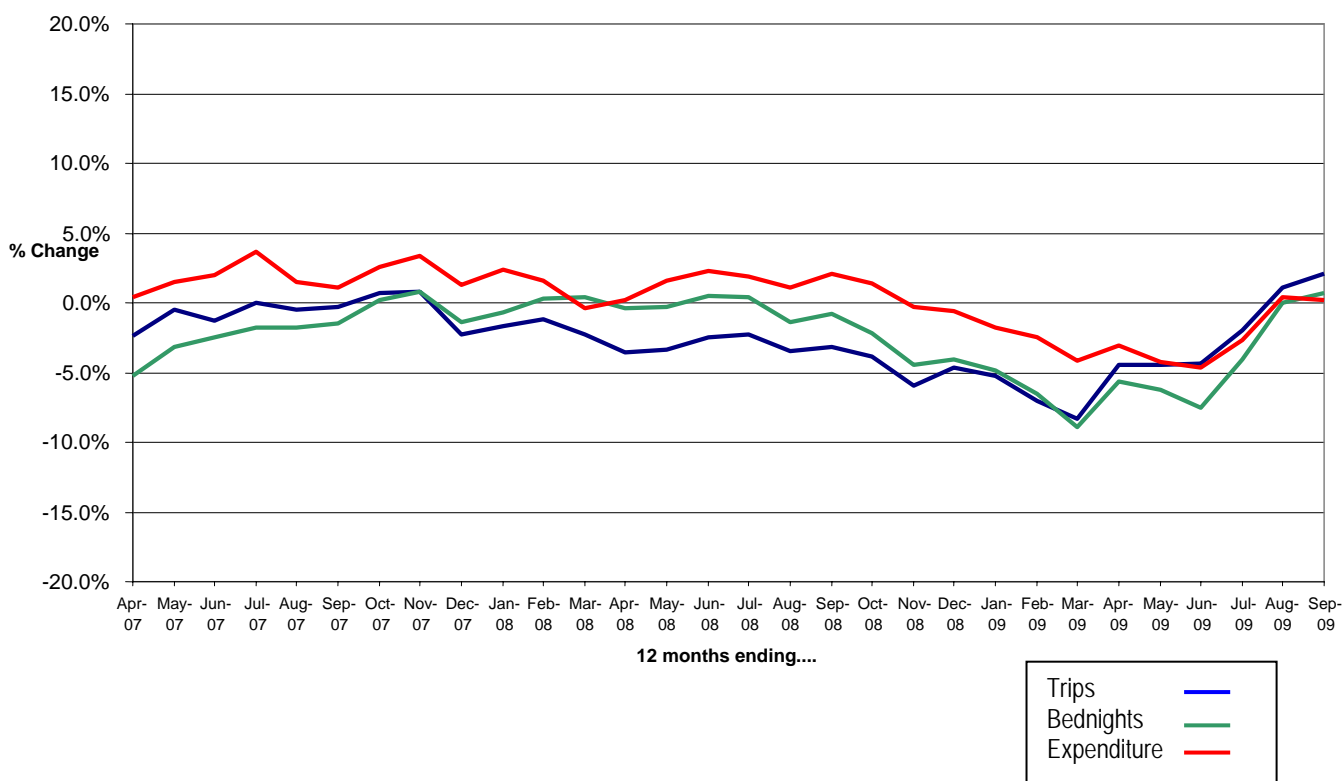
	TRIPS (MILLIONS)			SPEND (£BN)		
	2008	2009	% +/-	2008	2009	% +/-
<b>September 2009</b>	7.1	6.5	-9%	4.0	3.3	-18%
<b>Jan – Sep '09</b>	55.4	47.1	-15%	29.9	24.4	-18%
<b>Sep '08 – Sep '09</b>	70.4	60.8	-14%	37.0	31.4	-15%

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

**LEGEND:** Above Average Performance (Green), Average Performance (Yellow), Below Average Performance (Red)

**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: September 2009			Unweighted Trips	YTD: January - September 2009			Unweighted Trips	2 month rolling October 2008 - September 2009			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
<b>TOTAL</b>	9.8%	8.7%	0.9%	1648	6.4%	5.2%	3.3%	14730	2.1%	0.6%	0.2%	18351
<b>PURPOSE:</b>												
Pure Holiday	16.1%	15.5%	5.7%	858	17.3%	16.1%	11.4%	7787	11.9%	10.8%	7.7%	9121
- 1-3 nights holiday	14.9%	18.1%	1.0%	515	17.5%	16.0%	6.0%	4482	11.8%	10.3%	4.1%	5400
- 4+ nights holiday	18.2%	14.3%	10.4%	343	17.0%	16.2%	16.4%	3305	12.0%	11.1%	11.5%	3721
VFR (on holiday)	16.6%	27.7%	-8.2%	285	1.9%	5.1%	-3.6%	2656	1.1%	0.4%	-5.0%	3655
<b>HOLIDAY (TOTAL)</b>	16.2%	18.0%	3.5%	1143	13.0%	13.5%	8.8%	10443	8.6%	7.9%	5.2%	12776
VFR (non-holiday)	-6.6%	-17.5%	0.0%	243	-1.5%	-13.9%	-5.3%	2258	-8.4%	-15.1%	-10.8%	3052
<b>VFR (TOTAL)</b>	4.3%	5.8%	-4.4%	528	0.3%	-3.2%	-4.4%	4915	-3.5%	-6.3%	-7.5%	6707
Business	1.6%	-11.2%	-7.0%	223	-7.0%	-5.3%	-8.3%	1694	-8.1%	-9.0%	-8.7%	2117
<b>RDAs:</b>												
Adv West Midlands	8.2%	10.3%	-5.1%	104	2.5%	-12.1%	-7.7%	898	-4.9%	-16.1%	-14.6%	1135
East of England	-1.6%	21.1%	11.9%	120	8.7%	7.3%	-5.0%	1240	-0.1%	0.2%	-11.9%	1521
East Midlands	17.7%	-20.9%	9.1%	91	7.0%	-4.2%	0.1%	903	1.3%	-6.2%	-1.6%	1145
London	-25.1%	-28.5%	-28.2%	120	-7.9%	-15.7%	-8.4%	1138	-8.7%	-13.3%	-11.6%	1476
North West	-12.2%	-24.3%	-13.8%	183	2.8%	1.2%	5.8%	1493	0.4%	-5.5%	3.0%	1925
ONE North East	-8.9%	-26.1%	-38.5%	61	1.0%	-4.7%	-12.0%	426	7.0%	-4.5%	-6.2%	562
South East England	17.8%	7.4%	13.4%	230	13.3%	11.5%	9.2%	2182	11.0%	8.4%	8.6%	2715
South West	36.8%	51.2%	21.7%	309	11.9%	14.8%	13.6%	2619	7.1%	10.3%	9.1%	3159
Yorkshire Forward	17.4%	7.4%	5.9%	124	13.7%	13.4%	13.0%	1261	6.8%	4.5%	8.6%	1554
<b>LOCATION TYPE:</b>												
Seaside	10.8%	3.9%	4.4%	392	19.5%	21.1%	16.8%	3689	13.4%	16.2%	12.4%	4291
Large city/ large town	-3.2%	-14.4%	-17.7%	581	2.6%	-8.5%	-6.9%	5213	-1.5%	-11.0%	-9.4%	6713
Small town	15.4%	23.2%	28.9%	371	0.2%	0.2%	0.8%	3296	-2.0%	-2.8%	-0.1%	4270
Countryside/ village	31.8%	46.8%	15.0%	343	9.9%	12.2%	12.9%	2963	5.2%	5.6%	10.1%	3585
<b>AGE:</b>												
16-24	-18.6%	-35.0%	-28.4%	150	-2.5%	-15.8%	-8.8%	1596	-8.4%	-18.8%	-11.1%	2070
25-34	41.2%	-29.9%	14.5%	279	8.0%	-27.6%	6.3%	2343	3.9%	-26.6%	0.5%	2906
35-44	-8.2%	-5.3%	-23.6%	297	9.7%	12.4%	3.8%	3303	4.3%	6.5%	3.1%	4055
45-54	36.6%	40.5%	38.0%	317	9.5%	12.9%	7.0%	2596	4.5%	4.7%	3.0%	3161
55+	7.1%	4.5%	3.6%	606	4.9%	2.7%	3.1%	4892	2.8%	0.9%	0.2%	6159
<b>SEG:</b>												
AB	2.8%	-2.6%	-9.9%	527	3.9%	4.9%	-2.0%	4718	0.6%	0.6%	-4.6%	5836
C1	17.9%	26.7%	6.7%	505	6.6%	9.5%	10.2%	4614	1.8%	3.3%	3.9%	5695
C2	18.3%	21.6%	1.3%	298	9.5%	0.6%	1.6%	2613	5.5%	-0.3%	4.4%	3302
DE	2.3%	-5.8%	21.5%	318	8.9%	3.3%	5.8%	2786	2.5%	-2.8%	1.2%	3517
<b>CHILDREN IN H/H:</b>												
Any	8.0%	21.0%	10.1%	504	9.6%	13.4%	4.9%	5182	4.6%	7.9%	1.8%	6370
None	10.5%	5.5%	-1.5%	1144	5.0%	1.5%	2.6%	9548	0.9%	-2.6%	-0.4%	11981
<b>ACCOMMODATION:</b>												
Commercial accom	15.1%	12.7%	0.1%	1000	10.4%	9.9%	5.2%	8728	6.7%	5.8%	2.8%	10445
- Serviced accom	7.0%	1.7%	-6.0%	649	5.6%	3.4%	-1.0%	5440	3.9%	2.7%	-1.3%	6815
- Hotel/motel/guesthouse	7.6%	0.0%	-10.9%	569	5.6%	2.7%	-2.7%	4753	4.1%	2.1%	-2.9%	5990
- Bed & Breakfast	8.2%	12.3%	39.8%	88	4.3%	7.4%	12.5%	715	1.6%	6.1%	12.3%	861
Total self-catering rented	45.5%	36.7%	25.4%	334	24.7%	22.3%	21.2%	3047	16.4%	14.4%	15.1%	3307
-Camping & Caravanning (inc. owned caravans)	37.3%	22.0%	42.5%	282	20.6%	16.6%	15.1%	2477	17.4%	13.6%	12.4%	2649
-Other self-catering rented	46.5%	41.3%	15.6%	124	26.2%	24.2%	23.3%	1112	12.5%	12.1%	14.2%	1266
Hostels	-58.4%	-59.1%	-69.0%	10	-16.5%	-24.5%	-7.5%	173	-13.9%	-21.2%	-12.7%	216
Own home/friends'/relatives'	5.8%	8.8%	11.7%	630	1.9%	-0.1%	-2.3%	5849	-3.2%	-4.4%	-7.1%	7708

	England											
	Month: September 2009			Unweighted Trips	YTD: January - September 2009			Unweighted Trips	2 month rolling October 2008 - September 2009			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
<b>TOTAL</b>	6.8%	4.2%	-1.5%	1313	6.8%	4.9%	3.9%	11921	2.7%	0.5%	0.4%	14924
<b>PURPOSE:</b>												
Pure Holiday	15.0%	13.5%	5.9%	650	18.3%	19.1%	12.4%	6024	12.9%	13.1%	8.1%	7073
- 1-3 nights holiday	15.2%	20.9%	2.6%	388	17.6%	16.4%	3.9%	3498	12.5%	11.6%	3.5%	4237
- 4+ nights holiday	14.8%	10.3%	9.1%	263	19.3%	20.4%	21.0%	2522	13.6%	13.9%	13.1%	2830
VFR (on holiday)	16.4%	25.5%	-12.1%	245	4.7%	3.2%	-0.4%	2258	3.3%	-1.5%	-5.0%	3087
<b>HOLIDAY (TOTAL)</b>	15.4%	16.0%	2.7%	895	14.3%	15.0%	10.1%	8279	9.8%	8.8%	5.5%	10160
VFR (non-holiday)	-16.3%	-29.3%	-17.3%	202	-1.4%	-14.9%	-6.7%	1945	-7.2%	-14.2%	-9.1%	2659
<b>VFR (TOTAL)</b>	-1.5%	-2.7%	-14.6%	447	1.7%	-4.9%	-3.2%	4205	-1.9%	-7.1%	-6.8%	5748
Business	0.4%	-14.6%	-8.3%	183	-7.7%	-7.8%	-8.5%	1411	-9.0%	-10.8%	-9.1%	1754
<b>RDAs:</b>												
Adv West Midlands	8.2%	10.3%	-5.1%	104	2.5%	-12.1%	-7.7%	898	-4.9%	-16.1%	-14.6%	1135
East of England	-1.6%	21.1%	11.9%	120	8.7%	7.3%	-5.0%	1240	-0.1%	0.2%	-11.9%	1521
East Midlands	17.7%	-20.9%	9.1%	91	7.0%	-4.2%	0.1%	903	1.3%	-6.2%	-1.6%	1145
London	-25.1%	-28.5%	-28.2%	120	-7.9%	-15.7%	-8.4%	1138	-8.7%	-13.3%	-11.6%	1476
North West	-12.2%	-24.3%	-13.8%	183	2.8%	1.2%	5.8%	1493	0.4%	-5.5%	3.0%	1925
ONE North East	-8.9%	-26.1%	-38.5%	61	1.0%	-4.7%	-12.0%	426	7.0%	-4.5%	-6.2%	562
South East England	17.8%	7.4%	13.4%	230	13.3%	11.5%	9.2%	2182	11.0%	8.4%	8.6%	2715
South West	36.8%	51.2%	21.7%	309	11.9%	14.8%	13.6%	2619	7.1%	10.3%	9.1%	3159
Yorkshire Forward	17.4%	7.4%	5.9%	124	13.7%	13.4%	13.0%	1261	6.8%	4.5%	8.6%	1554
<b>LOCATION TYPE:</b>												
Seaside	11.2%	3.1%	6.2%	307	21.7%	24.3%	18.4%	2897	15.6%	19.4%	14.2%	3391
Large city/ large town	-7.3%	-22.2%	-22.4%	474	2.1%	-10.2%	-7.4%	4384	-1.0%	-12.3%	-9.5%	5665
Small town	6.8%	19.4%	19.8%	292	0.6%	0.5%	2.4%	2626	-1.7%	-2.6%	-0.8%	3411
Countryside/ village	34.2%	47.3%	17.0%	273	11.0%	10.7%	14.1%	2344	5.7%	4.7%	10.6%	2848
<b>AGE:</b>												
16-24	-19.3%	-36.2%	-24.8%	124	-5.2%	-21.4%	-10.9%	1299	-8.9%	-23.0%	-11.6%	1714
25-34	38.1%	43.5%	3.6%	234	12.1%	16.1%	6.3%	1932	8.0%	10.0%	1.2%	2398
35-44	-13.3%	-17.4%	-29.9%	222	10.0%	10.5%	6.9%	2640	4.4%	4.8%	4.3%	3256
45-54	27.8%	30.3%	39.5%	243	7.6%	8.6%	6.3%	2036	3.1%	0.4%	2.5%	2496
55+	6.6%	6.4%	5.5%	493	6.1%	5.5%	4.2%	4026	3.7%	3.8%	0.4%	5070
<b>SEG:</b>												
AB	-6.5%	-13.4%	-17.6%	412	3.7%	2.4%	-1.6%	3854	0.3%	-1.5%	-5.7%	4786
C1	12.6%	20.8%	3.0%	402	4.8%	9.5%	7.2%	3745	2.1%	4.4%	3.6%	4656
C2	32.8%	38.8%	10.8%	258	13.5%	3.3%	6.1%	2115	8.1%	1.1%	6.7%	2678
DE	2.1%	-11.7%	29.4%	239	11.5%	3.3%	10.1%	2194	3.8%	-2.7%	4.7%	2782
<b>CHILDREN IN H/H:</b>												
Any	-2.3%	2.7%	-1.5%	388	10.8%	12.5%	8.2%	4164	6.2%	7.1%	3.6%	5156
None	10.5%	4.6%	-1.6%	923	4.9%	1.6%	2.2%	7754	1.1%	-2.3%	-0.8%	9765
<b>ACCOMMODATION:</b>												
Commercial accom	15.2%	13.1%	-0.6%	801	11.3%	11.5%	5.7%	6978	7.3%	6.6%	2.5%	8354
- Serviced accom	4.5%	-0.7%	-8.2%	522	5.9%	4.3%	-1.5%	4422	4.2%	3.3%	-2.4%	5534
- Hotel/motel/guesthouse	7.1%	-1.3%	-10.7%	467	6.4%	3.9%	-2.9%	3899	4.9%	3.1%	-3.7%	4899
- Bed & Breakfast	8.2%	12.3%	39.8%	88	4.3%	7.4%	12.5%	715	1.6%	6.1%	12.3%	861
Total self-catering rented	45.5%	36.7%	25.4%	334	24.7%	22.3%	21.2%	3047	16.4%	14.4%	15.1%	3307
-C												