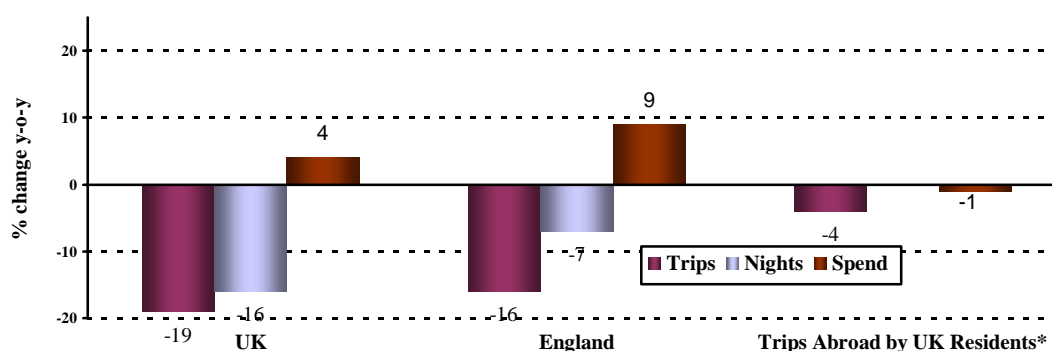


## United Kingdom Tourism Survey – April 2008 Update

### (1) Overview of April 2008 year-on-year changes



Source: UKTS, International Passenger Survey

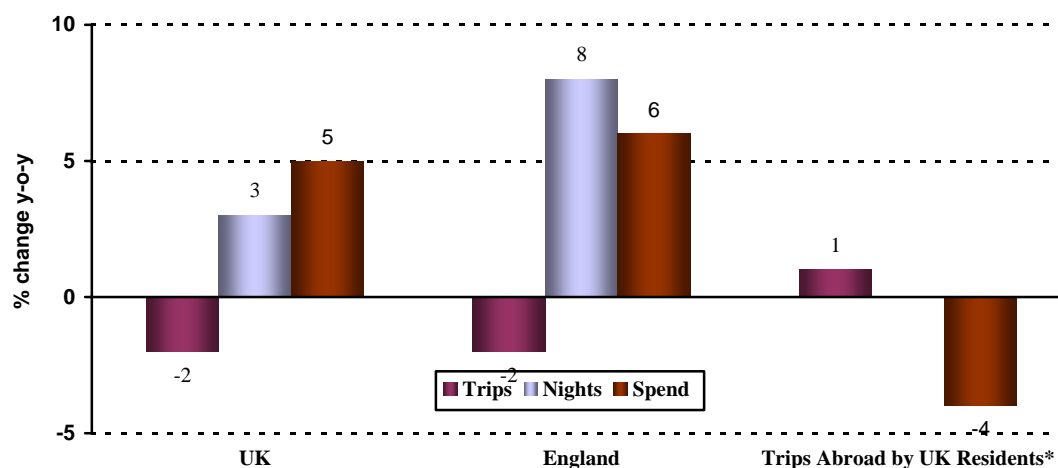
### (2) April 2008

There were 8.5m overnight trips made in the UK by UK residents in April 2008, a decrease of -19% from the same month in 2007 or 2m fewer trips. The number of bed nights also fell during the month, with -16% less nights recorded than in April 2007. On a more positive note, the average length of stay increased by +4% to 3.1 nights. The value of overnight trips rose by +4% during April but this increase does not take into account inflation (around +3% at the time). Nevertheless, domestic overnight trips were worth £1.7bn during the month. Average spend per night increased by +23% to £62, whilst average spend per trip increased +28%.

Easter fell in March 2008 but April in 2007, which largely explains the decline in trip volume in April 2008 compared to the year before. When the two months are combined, there were 18.1m overnight trips made, a -9% decline on March-April 2007. This suggests that the decrease in the number of trips during the reviewed period may not simply be attributed to the early March Easter. It will be interesting to see how the economic slowdown develops over the course of the next few months and what impact this will have on both domestic and overseas trips by UK residents.

	Trips (millions)	Nights (millions)	Spend (£ millions)	Average length of stay (nights)	Average spend per night (£s)	Average spend per trip (£s)
<b>United Kingdom</b>						
<b>Total</b>	8.5	26.6	1,656	3.1	62	194
<b>Holiday</b>	3.5	11.8	894	3.3	68	227
<b>VFR</b>	3.2	9.5	368	2.9	41	122
<b>Business</b>	1.6	4.4	280	2.8	95	269
<b>England</b>						
<b>Total</b>	7.1	21.9	1,340	3.1	61	190
<b>Holiday</b>	2.8	9.4	627	3.3	67	223
<b>VFR</b>	2.7	8.0	325	2.9	41	119
<b>Business</b>	1.3	3.9	358	2.9	92	269

### (3) Overview of Jan-April 2008 year-on-year changes



Source: UKTS, International Passenger Survey

### (4) Jan-April 2008

There were 32.9m overnight trips made in the UK by UK residents between January and April 2008, a decline of -2% from the same period in 2007. Growth in bed nights reversed the decline in trip volume, with 93.3m bed nights recorded, +3% more than during the January-April period in 2007. Spend on overnight trips was £5.6bn, up +4% on the first four months of 2007. The first three months of 2008 saw increases in domestic overnight trip volume (+3% in January, +8% in February and +2% in March) and the subsequent fall in trip volume during April can likely be attributed to the early Easter period in 2008. Consistent with 2007 data, VFR was the leading reason for travel during the first four months of 2008. It will be interesting to see how the economic slowdown impacts travel as the year progresses.

Trips taken Jan-April 2008	Trips (Millions)			Bed nights (millions)			Expenditure (£ million)		
	2007	2008	% Change	2007	2008	% Change	2007*	2008	% Change
<b>United Kingdom</b>									
Total	33.6	32.9	-2	90.2	93.3	3	5,371	5,611	5
Holiday	12.1	11.7	-3	36.5	35.5	-3	2,310	2,483	8
VFR	14.0	13.6	-3	36.8	38.0	3	1,300	1,402	8
Business	6.5	6.4	-2	13.6	15.2	12	1,585	1,574	-1
<b>England</b>									
Total	27.4	27.0	-2	70.2	76.1	8	4,208	4,469	6
Holiday	9.4	9.3	-1	26.3	27.8	6	1,739	1,937	11
VFR	11.9	11.4	-4	30.9	32.0	4	1,071	1,112	4
Business	5.4	5.3	-1	10.9	12.5	15	1,273	1,294	2

\* all expenditure figures are in historic prices

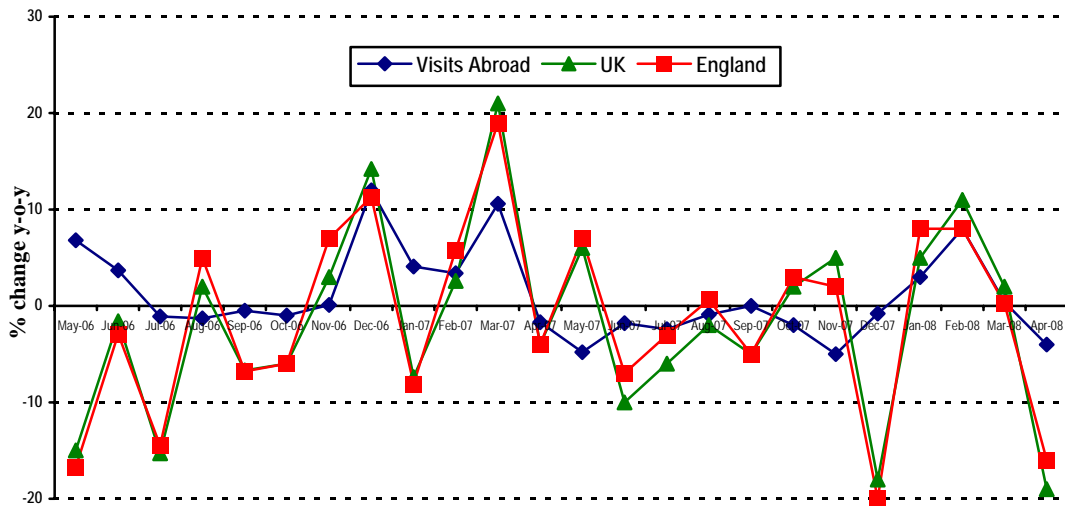
### (5) Trips Abroad by UK Residents in April 2008

UK residents made 5.8m trips abroad in April 2008, representing a decline year-on-year of -4%. Spend on overseas trips grew during the month showed a marginal decline to £1.3bn. As with domestic overnight trips, the early Easter period could explain the decline in outbound trips during April. It is interesting to note that at this point in the year UK residents do not seem to be substituting trips abroad for domestic holidays. However, the decline in value of outbound trips could indicate UK residents are more cautious with their spending whilst abroad.

	Trips '07	Trips '08	Difference	Exp '07	Exp '08	Difference
April 2008	6.0m	5.8m	-4%	£1.3bn	£1.3bn	-1%
Jan-Apr 2008	19.9m	20.2m	+1%	£4.4bn	£4.3bn	-4%

Source: International Passenger Survey

### (6) UK Resident Trips Abroad vs. UK and England Domestic Trips, May 2006-Apr 2008



Source: UKTS, International Passenger Survey

### (7) UK Domestic Trip Volume by Month, 2005-2008

