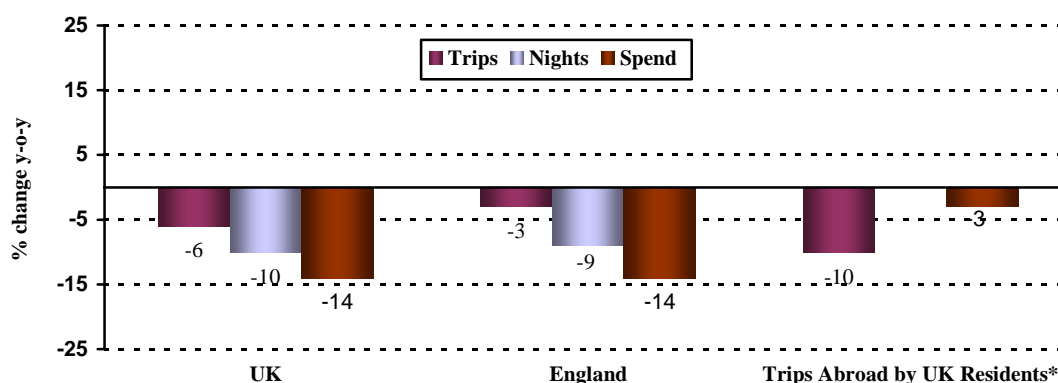


United Kingdom Tourism Survey – December 2008 Update

(1) Overview of December 2008 year-on-year changes



Source: UKTS, *International Passenger Survey

(2) December 2008

After a significant fall in November, domestic tourism trips were also down in December, but less dramatically than in the previous month— perhaps people were less willing to compromise on Christmas and New Year plans. However, spend fell far more steeply than the number of trips taken due both to shorter holiday trip length but also lower spend per night, possibly a reflection of widespread value offers and discounting.

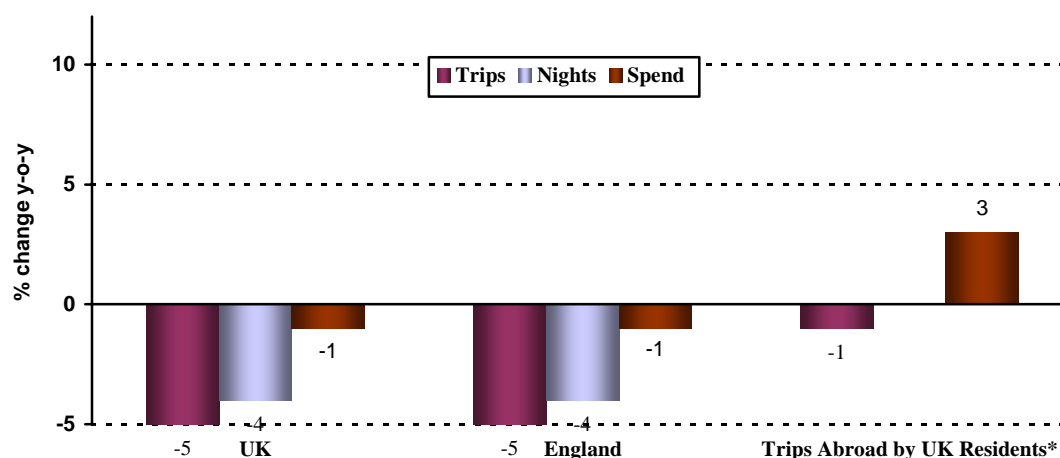
There were 9.8m overnight trips made in the UK by UK residents in December 2008, a fall of -6% from December 2007 – equivalent to 0.6m fewer trips. The number of bed nights fell by -10% to 29.70 during the month as trips taken were shorter in length. The value of overnight trips fell by -14% during December - domestic overnight trips were worth £1.38bn compared with £1.61bn in December 2007.

Average spend per night decreased by -5% to £46 and average spend per trip fell by -9% to £141 compared to December 2007 (note this does not take into account inflation which was around +1% at the time). The overall decline in trips taken was driven by a reduction in VFR trips (down -9%) while holiday trips fell by (-4%) and business trips, the smallest segment, increased (+12%). There was a sharp drop in holiday nights (-19%), business nights (-14%) and to a lesser extent VFR nights (-5%) (note the Xmas Bank Holiday fell on Thurs/Fri this year and Tues/Wed in 07).

In England there were 8.2m domestic overnight trips, -3% less than in December 2007 (equivalent to around 0.2m less trips) while nights and expenditure decreased by -9% and -14% respectively mainly driven by a fall in holiday nights (-19%) and spend on holiday (-17%) and VFR (-16%) trips.

	Trips (millions)	Nights (millions)	Spend (£ millions)	Average length of stay (nights)	Average spend per night (£s)	Average spend per trip (£s)
United Kingdom						
Total	9.8	29.7	1,377	3.0	46	141
Holiday	2.8	7.9	576	2.9	73	212
VFR	5.8	19.3	528	3.3	27	91
Business	1.2	2.2	264	1.9	117	219
England						
Total	8.2	23.4	1,088	2.8	46	132
Holiday	2.2	5.9	435	2.7	74	200
VFR	4.9	15.4	405	3.1	26	82
Business	1.1	1.9	240	1.8	126	225

(3) Overview of Jan-Dec 2008 year-on-year changes



Source: UKTS, International Passenger Survey

(4) Jan-December 2008

117.7m overnight trips were made in the UK by UK residents in 2008, down -5% on the same period in 2007, while bed nights fell by -4% with 378.4m bed nights recorded. Expenditure decreased by 1% to around £21.1bn compared to full year 2007, but again, this doesn't take into account inflation.

Within England, trips declined by -5% and, like the monthly results, VFR experienced the steepest decline during the eleven month period (-8%) compared to Jan-December 2007. Holiday trips fell by -4% while nights dropped by -6%.

Trips taken Jan-Dec 2008	Trips (Millions)			Bed nights (millions)			Expenditure (£ million)		
	2007	2008	% Change	2007	2008	% Change	2007*	2008	% Change
United Kingdom									
Total	123.5	117.7	-5	394.4	378.4	-4	21,238	21107	-1
Holiday	53.7	52.0	-3	203.9	193.1	-5	11,465	11388	-1
VFR	47.8	44.1	-8	134.9	128.3	-5	4,835	4750	-2
Business	19.1	18.9	-1	45.7	44.6	-2	4,532	4611	2
England									
Total	100.2	95.5	-5	307.8	295.4	-4	16,531	16433	-1
Holiday	41.6	40.0	-4	152.5	142.7	-6	8,776	8654	-1
VFR	40.5	37.4	-8	111.1	105.7	-5	3,889	3798	-2
Business	15.7	15.7	0	36.3	35.9	-1	3,543	3679	4

* all expenditure figures are in historic prices

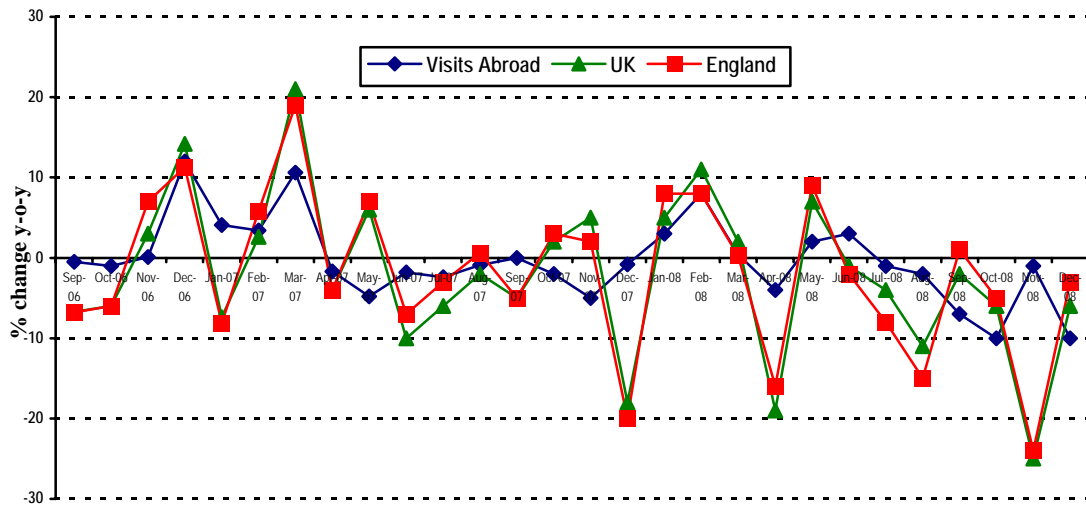
(5) Trips Abroad by UK Residents in December 2008

UK residents made 3.7m trips abroad in December 2008, representing a year-on-year decrease of -10%. Spend on overseas trips fell by -3% compared to the year before at £1.9bn during the month.

	Trips '07	Trips '08	Difference	Exp '07	Exp '08	Difference
Dec 2008	4.2m	3.7m	-10%	£2.0bn	£1.9bn	-3%
Jan-Dec '08	69.5m	68.8m	-1%	£16.0bn	£16.4bn	+3%

Source: International Passenger Survey

(6) UK Resident Trips Abroad vs. UK and England Domestic Trips, August 2006-December 2008



Source: UKTS, International Passenger Survey

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

