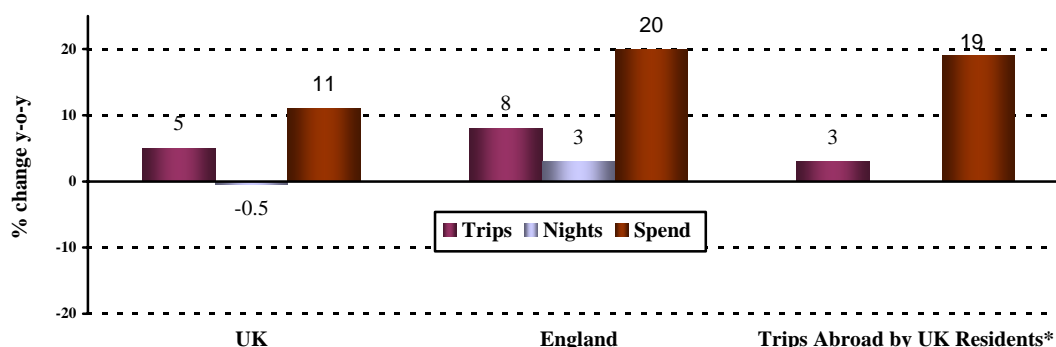


## United Kingdom Tourism Survey – January and February 2008 Update

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



Source: UKTS, International Passenger Survey

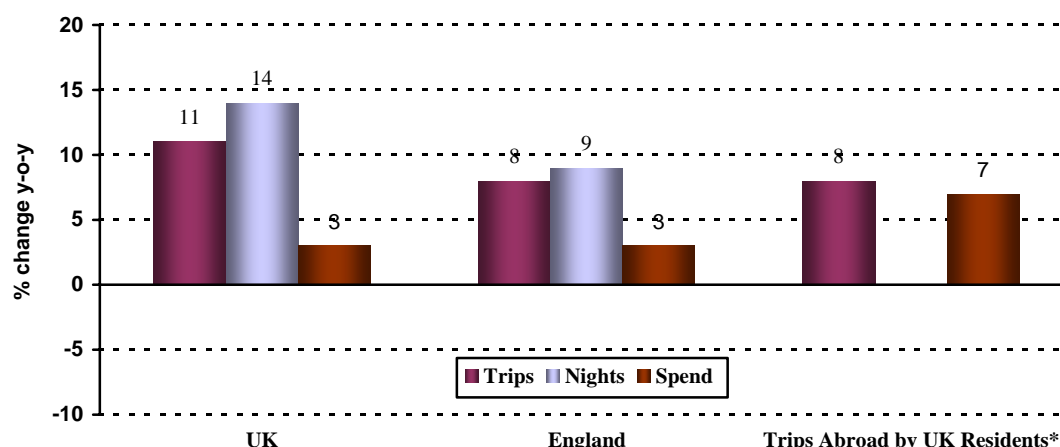
### (2) January 2008

There were 6.3m overnight trips made in the UK by UK residents in January 2008, an increase of +5% from the same month in 2007. UK residents shortened the length of their stays during the month, with -0.5% fewer nights recorded than January 2007. This fall drove the average length of stay down -5% to 2.5 nights. The value of overnight trips rose dramatically during January, increasing +11% to £1,033m. This leap, combined with a shortening of nights meant that average spend per night increased +11%.

January is traditionally a very slow month for overnight domestic travel, and the low number of overall trips made in January compared to other months of the year means that the sample sizes are low. It will be necessary for complete Q1 data to become available before trend data is more robust.

	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>						
Total	6.3	15.5	1,033	2.5	67	164
Holiday	1.6	4.2	357	2.6	86	221
VFR	2.9	6.8	245	2.3	36	85
Business	1.6	3.8	408	2.4	107	262
<b>England</b>						
Total	5.3	12.7	861	2.4	68	162
Holiday	1.3	3.4	294	2.6	87	222
VFR	2.5	5.8	200	2.3	35	81
Business	1.3	3.0	345	2.2	116	258

### (3) Overview of February 2008 year-on-year changes



Source: UKTS, International Passenger Survey

### (4) February 2008

There were 8.4m overnight trips made in the UK by UK residents in February 2008, an increase of +11% from the same month in 2007. Reversing the trend of January, trips were longer in duration in February, with +14% more bed nights than February 2007, and average length of stay up +3%. The increase in value of domestic overnight trips in February 2008 was more subdued than with trips and nights, up +3% compared with February 2007 to £1.3bn.

As with January, February is also a slow month for domestic overnight tourism, with the 7-8m trips recorded on average well below the 15-16m usually recorded in the busiest travel month of August. Nevertheless, January and February combined saw 14.7m overnight trips, +8% higher than the same period in 2007. It will be interesting to see what impact the very early and very wet Easter has on trip behaviour when March data is released.

	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>						
Total	8.4	20.6	1,294	2.5	63	154
Holiday	2.8	7.5	541	2.7	72	197
VFR	3.8	9.0	342	2.4	38	91
Business	1.7	3.6	380	2.2	107	230
<b>England</b>						
Total	6.9	16.6	1,034	2.4	62	151
Holiday	2.2	5.8	420	2.7	73	195
VFR	3.1	7.4	266	2.4	36	85
Business	1.4	2.9	318	2.2	109	235

### (5) Trips Abroad by UK Residents in January and February 2008

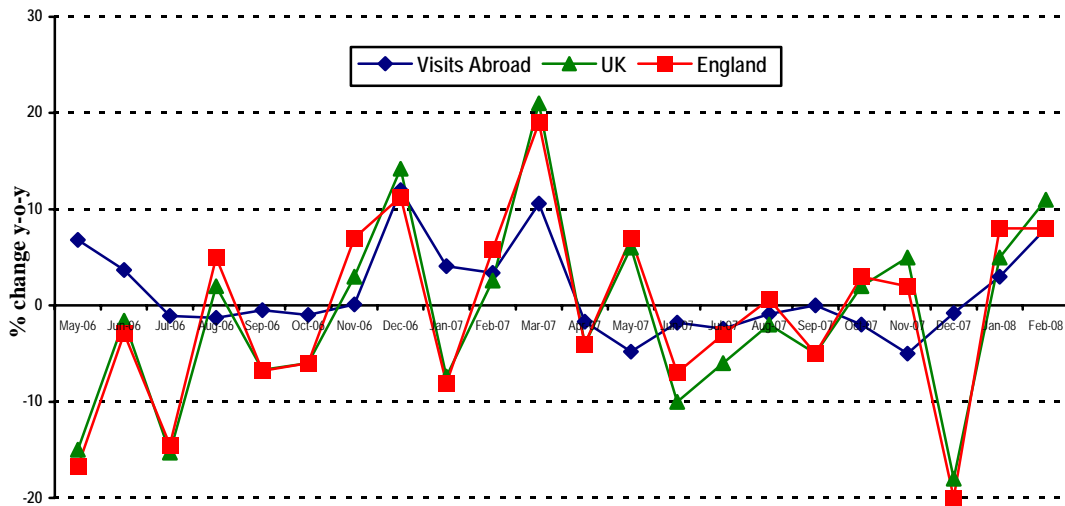
UK residents made 4.6m and 4.8m trips abroad in January and February 2008, respectively. This represented an increase year-on-year for both months (+3% for January and +8% for February). Spending in both months also increased, up +19% in January and +7% in February.

With headlines at the beginning of 2008 dominated by talk of an economic slowdown and reduction of consumer confidence, it is interesting to note that propensity to travel in Jan and Feb appeared strong with increases in domestic and outbound travel across both months.

	Trips '07	Trips '08	Difference	Exp '07	Exp '08	Difference
Jan	4.6m	4.8m	+3%	£2.2bn	£2.8bn	+19%
Feb	4.2m	4.6m	+8%	£2.3bn	£2.5bn	+7%

Source: International Passenger Survey

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



Source: UKTS, International Passenger Survey

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

