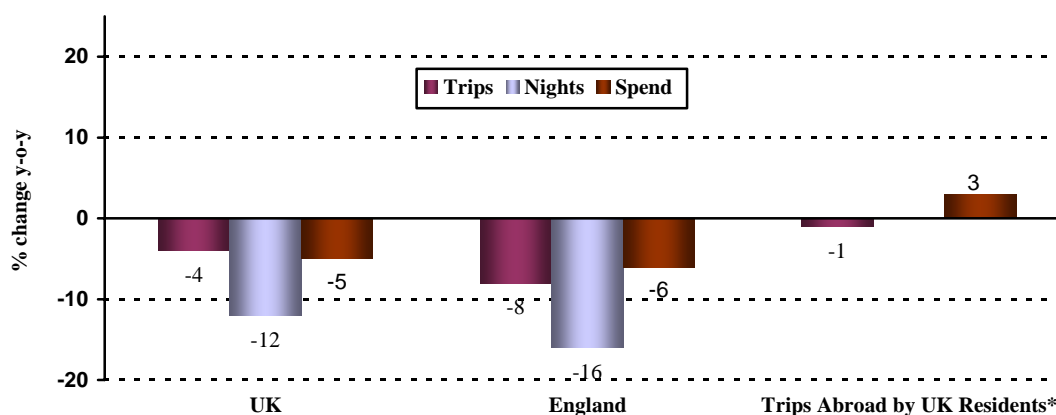


United Kingdom Tourism Survey – July 2008 Update

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



Source: UKTS, International Passenger Survey

(2) July 2008

There were 12m overnight trips made in the UK by UK residents in July 2008, a decrease of -4% from the same month in 2007 – equivalent to 0.5m fewer trips. The number of bed nights also declined during the month, with -12% less nights recorded than in July 2007. The average length of stay fell from 4.1 to 3.8 nights.

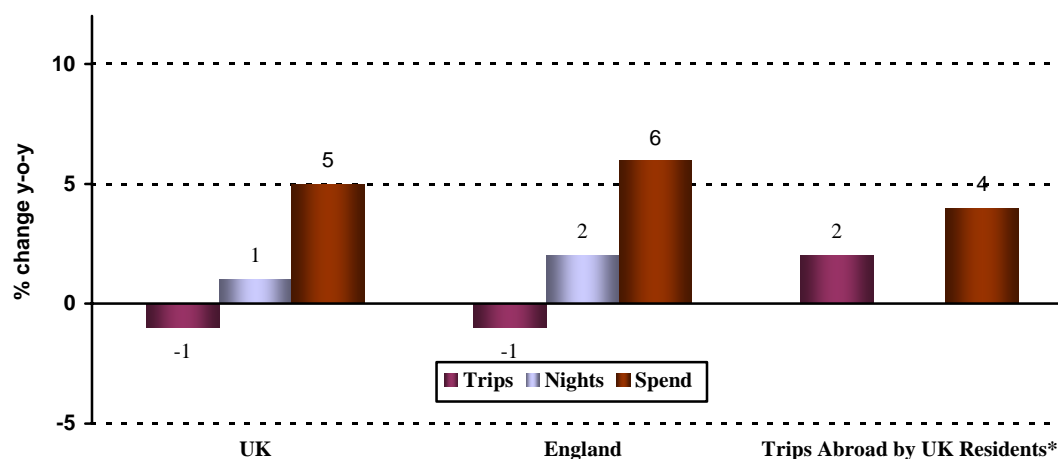
The value of overnight trips dropped by -5% during July (note this does not take into account inflation which was around +5% at the time). Domestic overnight trips were worth £2.4bn during the month and, while average spend per night increased by +8% to £53, the shorter trip length meant that the average spend per trip dropped slightly by -1% to £201 compared to July 2007.

VFR (visiting friends and family) trip volume declined by -8% on the same period last year and VFR nights fell by -19%. Holiday trip volume also dropped by -5% and nights by -8% compared with July 2007. Nevertheless, holidays accounted for over half of all domestic overnight trips and almost 2/3 of expenditure.

Within England there were 9.4m domestic overnight trips, -8% less than in July 2007 while nights and expenditure decreased by 16% and 6% respectively. England rainfall was 172% of the 1961-1990 average in July 2008 and this may have contributed to the decline in 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	12.0	45.3	2,421	3.8	53	201
Holiday	6.5	30.9	1,514	4.8	49	233
VFR	3.6	10.0	449	2.8	45	125
Business	1.8	3.7	433	2.1	117	241
England						
Total	9.4	33.2	1,837	3.5	55	196
Holiday	4.8	21.7	1,130	4.5	52	235
VFR	3.5	7.9	334	2.3	42	95
Business	1.7	3.1	356	1.8	115	209

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



Source: UKTS, International Passenger Survey

(4) Jan-July 2008

67.6m overnight trips were made in the UK by UK residents between January and July 2008, down -1% on the same period in 2007. However, bed nights and expenditure both increased compared to the first seven months of 2007. Bed nights rose marginally by 1%, with 215.65m bed nights recorded while spend on overnight trips was £12.3bn, up +5% on the first seven months of 2007 (though again this doesn't take into account inflation). Compared to Jan-July 2007, the number of business trips increased while VFR and holiday trips declined slightly.

In England, increases in bed nights (+2%) and expenditure (+6%) were slightly higher than for the UK as a whole.

Trips taken Jan-June 2008	Trips (Millions)			Bed nights (millions)			Expenditure (£ million)		
	2007	2008	% Change	2007	2008	% Change	2007*	2008	% Change
United Kingdom									
Total	68.1	67.6	-1	213.3	215.65	1	11,744	12,328	5
Holiday	29.7	29.2	-2	118.0	108.7	-8	6,300	6,458	3
VFR	25.4	24.6	-3	70.1	71.3	2	2,484	2,695	8
Business	11.3	11.8	4	25.5	27.7	9	2,704	2,916	8
England									
Total	55.3	54.9	-1	165.5	169.47	2	9,106	9,666	6
Holiday	22.9	22.6	-1	81.8	80.5	-2	4,704	4,951	5
VFR	21.5	20.6	-4	58.3	59.3	2	2,032	2,136	5
Business	9.5	9.9	4	20.9	22.9	10	2,158	2,358	9

* all expenditure figures are in historic prices

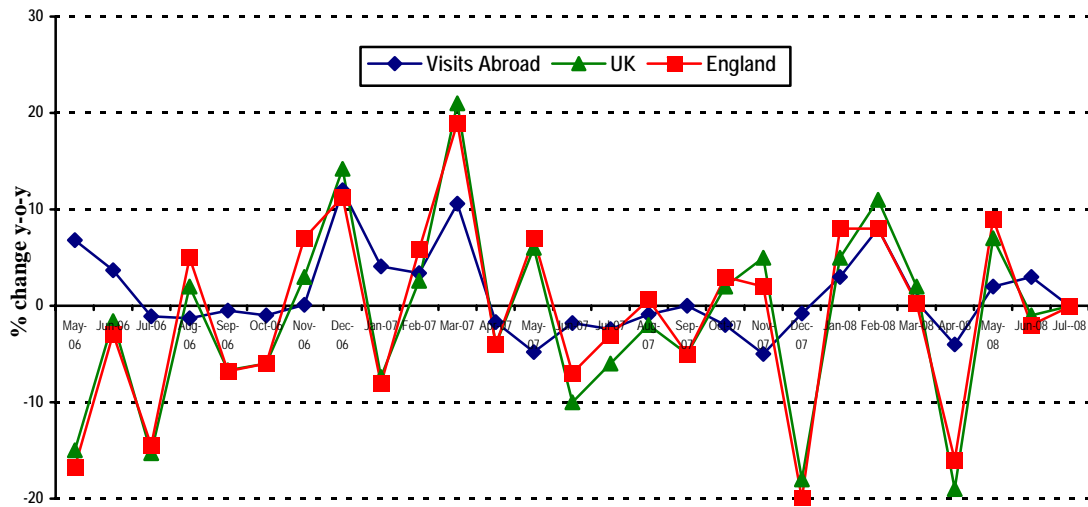
(5) Trips Abroad by UK Residents in July 2008

UK residents made 6.7m trips abroad in July 2008, representing a year-on-year decrease of -1%. Spend on overseas trips increased by +3% during the month to £3.7bn.

	Trips '07	Trips '08	Difference	Exp '07	Exp '08	Difference
July 2008	6.8m	6.7m	-1%	£3.6bn	£3.7bn	+3%
Jan-July 2008	38.3m	39.59m	+3%	£19.3bn	£20.8bn	+8%

Source: International Passenger Survey

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



Source: UKTS, International Passenger Survey

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

