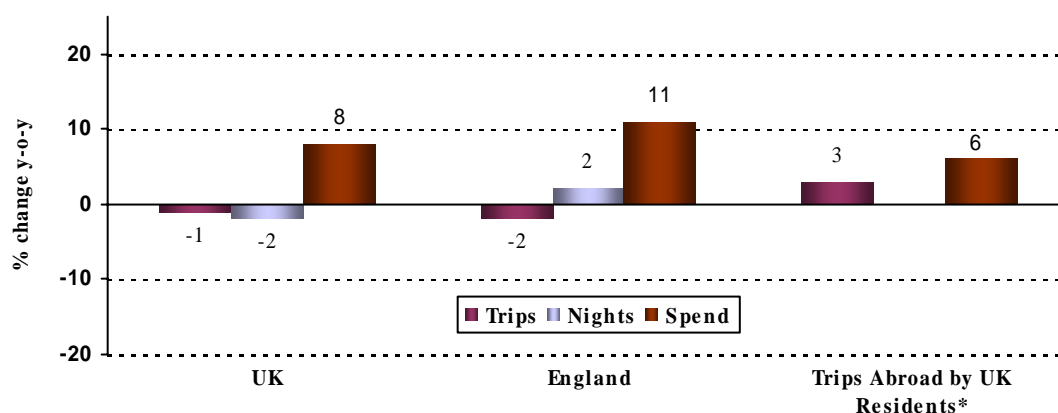


United Kingdom Tourism Survey – June 2008 Update

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



Source: UKTS, International Passenger Survey

(2) June 2008

There were 10.8m overnight trips made in the UK by UK residents in June 2008, a decrease of -1% from the same month in 2007 or 0.1m fewer trips. The number of bed nights increased during the month, with +2% more nights recorded than in June 2007. The average length of stay increased from 3.2 to 3.3 nights.

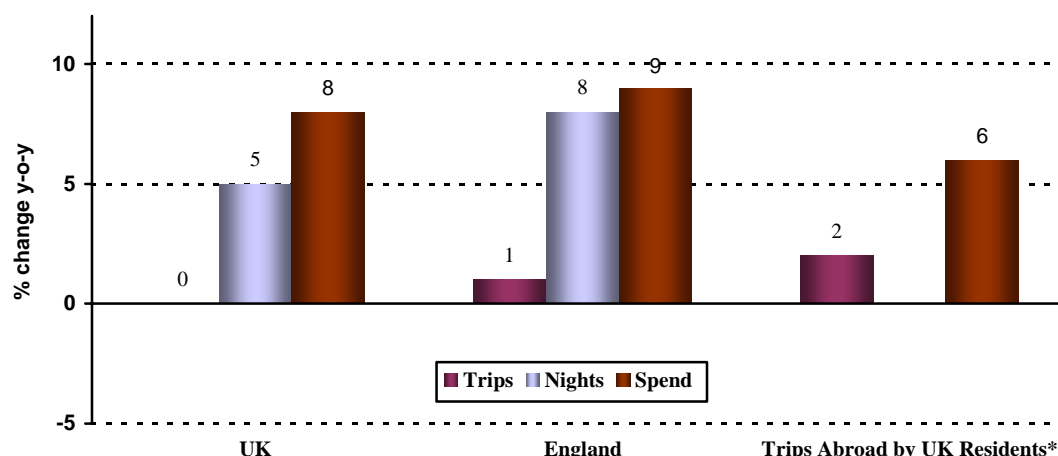
The value of overnight trips rose by +8% during June (note this does not take into account inflation which was around +5% at the time). Domestic overnight trips were worth £2.2bn during the month while average spend per night increased by +7% to £60 and average spend per trip increased +9% to £200 compared to June 2007.

Within this holiday trip volume declined by -9% and nights by -10% compared with June 2007. Nevertheless, holidays accounted for around half of all domestic overnight trips and almost 3/5 of expenditure. England experienced the greatest decline in holiday trips and nights (-11% in both).

Within England there were 8.7m domestic overnight trips, -2% less than in June 2007 while nights and expenditure increased by 2% and 10% respectively. UK residents made 1.5m fewer domestic trips in June 2008 than they did in June 2005 with the greatest decline seen between June 2006 and June 2007.

| | Trips (millions) | Nights (millions) | Spend (£ millions) | Average length of stay (nights) | Average spend per night (£s) | Average spend per trip (£s) |
|-----------------------|------------------|-------------------|--------------------|---------------------------------|------------------------------|-----------------------------|
| United Kingdom | | | | | | |
| Total | 10.8 | 35.8 | 2,150 | 3.3 | 60 | 200 |
| Holiday | 5.1 | 19.8 | 1,237 | 3.9 | 62 | 243 |
| VFR | 3.5 | 10.3 | 405 | 2.9 | 39 | 116 |
| Business | 1.9 | 4.7 | 469 | 2.5 | 100 | 247 |
| England | | | | | | |
| Total | 8.7 | 28.1 | 1,680 | 3.2 | 60 | 192 |
| Holiday | 3.9 | 14.7 | 929 | 3.8 | 63 | 238 |
| VFR | 2.9 | 8.6 | 338 | 3.0 | 39 | 117 |
| Business | 1.6 | 3.9 | 378 | 1.3 | 97 | 130 |

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



Source: UKTS, International Passenger Survey

(4) Jan-June 2008

55.6m overnight trips were made in the UK by UK residents between January and June 2008, unchanged compared with the same period in 2007. However, bed nights and expenditure both increased compared to the first six months of 2007. Bed nights rose by 5%, with 169.75 bed nights recorded while spend on overnight trips was £9.9bn, up +7% on the first six months of 2007. Compared to Jan-June 2007, the number of business trips increased while VFR and holiday trips declined slightly. Holiday trips accounted for the greatest share of trips for the first six months of 2008.

In England, increases in bed nights (+8%) and expenditure (+10%) were 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 | 55.6 | 55.6 | - | 161.3 | 169.8 | 5 | 9,198 | 9,907 | 8 |
| Holiday | 22.9 | 22.7 | -1 | 78.4 | 77.8 | -1 | 4,586 | 4,944 | 8 |
| VFR | 21.5 | 21.0 | -2 | 57.1 | 61.2 | 7 | 2,032 | 2,246 | 11 |
| Business | 9.9 | 10.1 | 2 | 21.3 | 24.1 | 13 | 2,377 | 2,483 | 4 |
| England | | | | | | | | | |
| Total | 45.2 | 45.5 | 1 | 125.35 | 135.81 | 8 | 7,150 | 7,828 | 10 |
| Holiday | 17.7 | 17.8 | 1 | 57.1 | 58.8 | 3 | 3,431 | 3,821 | 11 |
| VFR | 18.2 | 17.6 | -4 | 47.9 | 51.4 | 7 | 1,682 | 1,802 | 7 |
| Business | 8.2 | 8.4 | 3 | 17.1 | 19.8 | 16 | 1,876 | 2,002 | 7 |

* all expenditure figures are in historic prices

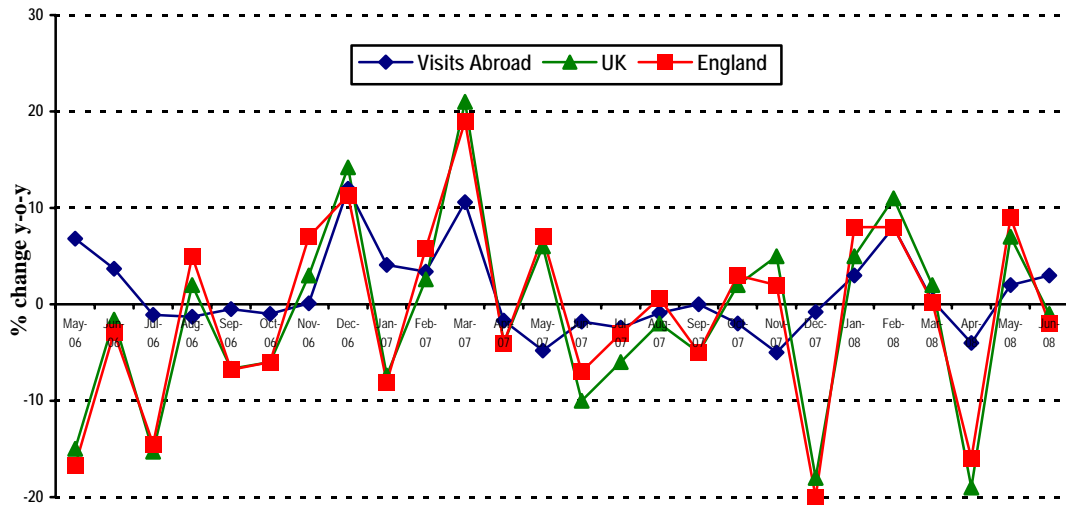
(5) Trips Abroad by UK Residents in June 2008

UK residents made 6.9m trips abroad in June 2008, representing a year-on-year increase of +3%. Spend on overseas trips also increased by +6% during the month to £3.6bn.

| | Trips '07 | Trips '08 | Difference | Exp '07 | Exp '08 | Difference |
|--------------|-----------|-----------|------------|---------|---------|------------|
| June 2008 | 6.7m | 6.9m | +3% | £3.4bn | £3.6bn | +6% |
| Jan-Jun 2008 | 31.5m | 32.79m | +2% | £16.2bn | £17.1bn | +6% |

Source: International Passenger Survey

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



Source: UKTS, International Passenger Survey

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

