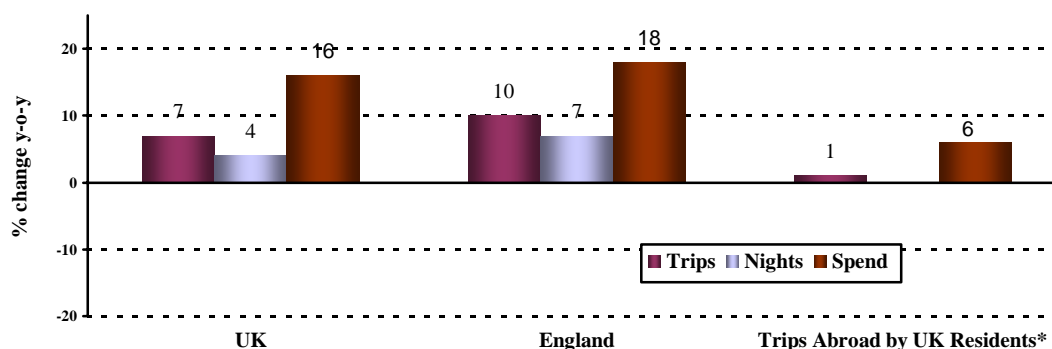


United Kingdom Tourism Survey – May 2008 Update

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



Source: UKTS, International Passenger Survey

(2) May 2008

There were 11.9m overnight trips made in the UK by UK residents in May 2008, an increase of +7% from the same month in 2007 or 2.6m more trips, helping to reverse the decline in domestic tourism seen in April 2008.

The number of bed nights increased during the month, with +4% more nights recorded than in May 2007. On a slightly less positive note, the average length of stay decreased from 3.3 to 3.2 nights. The value of overnight trips rose by +16% during May (note this does not take into account inflation which was around +3% at the time).

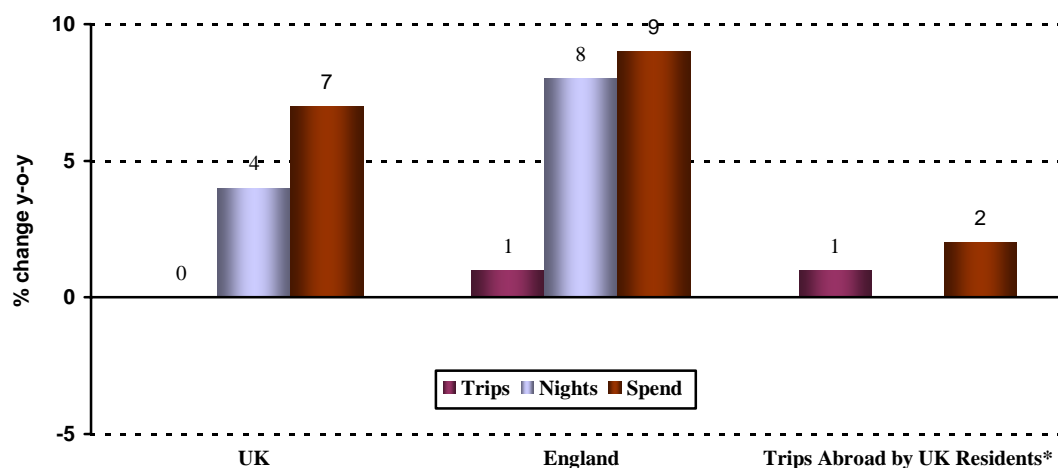
Domestic overnight trips were worth £2.1bn during the month while average spend per night increased by +11% to £57 and average spend per trip increased +8% compared to May 2007.

Holidays accounted for around half of all domestic overnight trips and spend possibly encouraged by the good weather, according to the Met Office mean temperatures were 2-3 degrees above average in May 2008.

Within England there were 9.7m domestic overnight trips which is 10% higher than in May 2007 while nights and expenditure increased by 7% and 18% respectively.

	Trips (millions)	Nights (millions)	Spend (£ millions)	Average length of stay (nights)	Average spend per night (£s)	Average spend per trip (£s)
United Kingdom						
Total	11.9	37.5	2,140	3.2	57	179
Holiday	6.0	21.4	1,223	3.6	57	204
VFR	3.9	11.1	434	2.8	39	111
Business	1.8	4.2	422	2.3	100	234
England						
Total	9.7	29.6	1,674	3.0	57	172
Holiday	4.7	16.2	955	3.4	59	203
VFR	3.4	9.2	348	2.7	38	102
Business	1.5	3.4	319	2.3	94	213

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



Source: UKTS, International Passenger Survey

(4) Jan-May 2008

44.8m overnight trips were made in the UK by UK residents between January and May 2008, while this was virtually unchanged vs. 2007 (44.7m), bed nights and expenditure have both increased compared to the first five months of 2007. Bed nights rose by 4%, with 130.82 bed nights recorded while spend on overnight trips was £7.8bn, up +7% on the first five months of 2007.

Compared to Jan-May 2007, the number of holiday trips increased while both VFR and business declined, holiday has now overtaken VFR to account for the greatest share of trips for the first five months of 2008.

In England, increases in holiday trips (+5%), bed nights (+5%) and spend (+18%) are higher than for the UK as a whole.

Trips taken Jan-May 2008	Trips (Millions)			Bed nights (millions)			Expenditure (£ million)		
	2007	2008	% Change	2007	2008	% Change	2007*	2008	% Change
United Kingdom									
Total	44.7	44.8	-	126.1	130.8	4	7,213	7,751	8
Holiday	17.3	17.7	2	56.4	56.8	1	3,279	3,706	13
VFR	17.8	17.5	-2	47.5	49.1	3	1,668	1,836	11
Business	8.5	8.2	-4	18.5	19.4	5	2,095	2,014	-4
England									
Total	36.3	36.7	1	97.8	105.7	8	5,626	6,143	9
Holiday	13.3	14.0	5	40.5	44.1	9	2,458	2,892	18
VFR	15.1	14.8	-2	39.9	41.1	3	1,385	1,459	5
Business	7.0	6.8	-3	14.8	15.9	7	1,653	1,625	2

* all expenditure figures are in historic prices

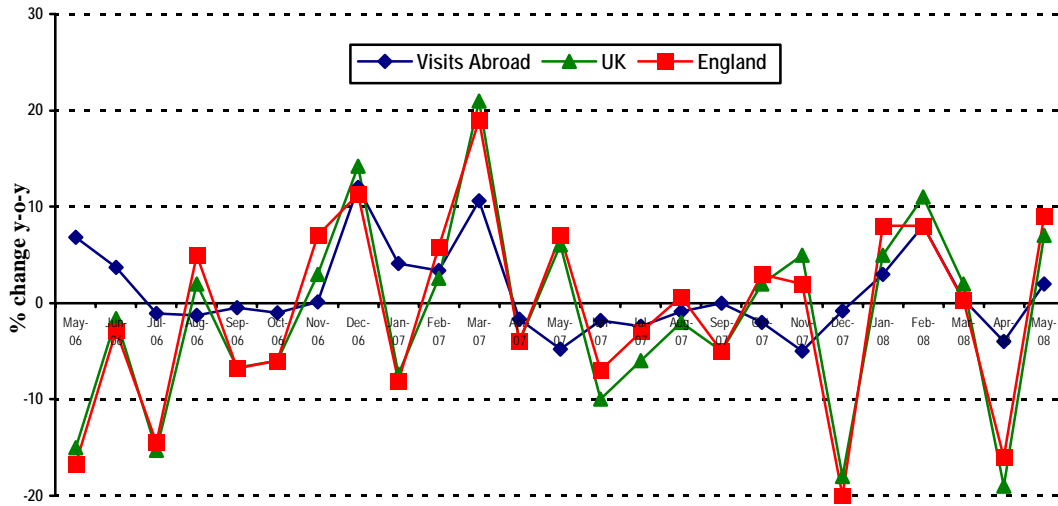
(5) Trips Abroad by UK Residents in May 2008

UK residents made 3.0m trips abroad in May 2008, representing a year-on-year increase of 1%. Spend on overseas trips grew by 6% during the month to £1.4bn.

	Trips '07	Trips '08	Difference	Exp '07	Exp '08	Difference
May 2008	3.0m	3.0m	1%	£1.3bn	£1.4bn	6%
Jan-May 2008	12.8m	12.9m	1%	£3.5bn	£3.8bn	2%

Source: International Passenger Survey

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



Source: UKTS, International Passenger Survey

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

