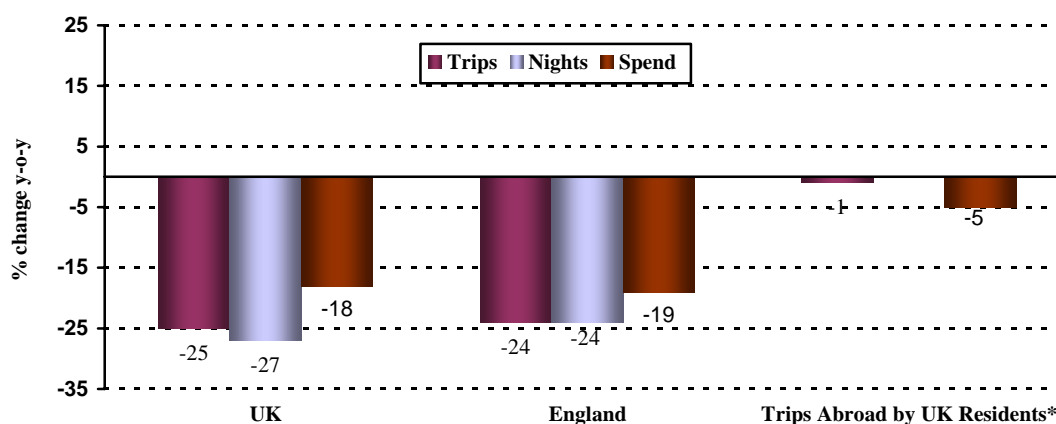


United Kingdom Tourism Survey – November 2008 Update

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



Source: UKTS, *International Passenger Survey

(2) November 2008

After a slight fall in October, domestic tourism declined more steeply in November as the economic downturn deepened.

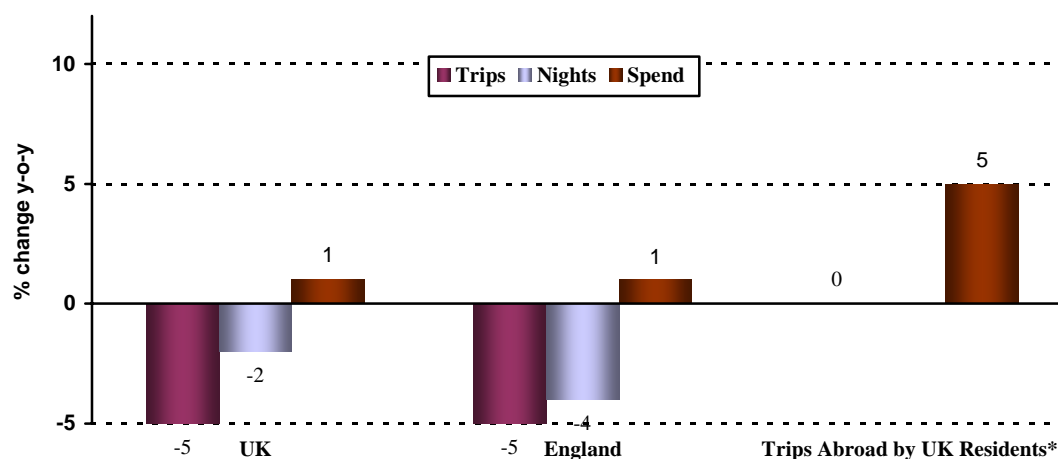
There were 6.6m overnight trips made in the UK by UK residents in November 2008, a fall of -25% from the same month in 2007 – equivalent to 2.2m fewer trips. The number of bed nights fell by -27% to 16.14 during the month. The value of overnight trips fell by -18% during November and domestic overnight trips were worth £1.16bn during the month compared with £1.41bn in November 2007.

Average spend per night actually increased by 13% to £72 and average spend per trip increased by 10% to £177 compared to November 2007 (note this does not take into account inflation which was around +3% at the time) i.e. the overall reduction in spend was due to fewer trips being taken, not a lower spend per trip. The overall decline was across all trip types; VFR (down -28%), Holiday (down -25%) and Business (down -15%). Spend fell most steeply across Business visits (-22%) driven by a fall in trip length.

In England there were 5.5m domestic overnight trips, -24% less than in November 2007 (equivalent to around 1.7m less trips) while nights and expenditure decreased by -24% and -19% respectively. Again, there were declines across all three trip types but most noticeably VFR (-26%) and Holiday (-23%).

	Trips (millions)	Nights (millions)	Spend (£ millions)	Average length of stay (nights)	Average spend per night (£s)	Average spend per trip (£s)
United Kingdom						
Total	6.6	16.1	1,160	2.5	72	177
Holiday	2.2	6.0	539	2.7	89	245
VFR	2.9	6.7	299	2.3	45	105
Business	1.4	2.9	304	2.1	107	224
England						
Total	5.5	13.1	914	2.4	70	167
Holiday	1.8	4.7	405	2.7	86	231
VFR	2.5	5.7	255	2.3	44	101
Business	1.1	2.2	240	2.0	111	226

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



Source: UKTS, International Passenger Survey

(4) Jan-November 2008

107.9m overnight trips were made in the UK by UK residents between January and November 2008, down -5% on the same period in 2007, while bed nights fell by -3% with 348.69m bed nights recorded. Expenditure increased by 1% to around £19.7bn compared to the first eleven months of 2007.

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-November 2007. Holiday trips fell by -4% while nights dropped by -6%.

Trips taken Jan-Nov 2008	Trips (Millions)			Bed nights (millions)			Expenditure (£ million)		
	2007	2008	% Change	2007	2008	% Change	2007*	2008	% Change
United Kingdom									
Total	113.0	107.9	-5	361.2	348.7	-3	19,631	19730	1
Holiday	50.9	49.2	-3	194.2	185.2	-5	10,795	10812	0
VFR	41.5	38.3	-8	114.5	108.9	-5	4,196	4222	1
Business	18.1	17.7	-2	43.1	42.4	-2	4,267	4346	2
England									
Total	91.7	87.3	-5	281.9	272.0	-4	15,264	15345	1
Holiday	39.4	37.9	-4	145.1	136.8	-6	8,250	8220	0
VFR	35.3	32.5	-8	95.0	90.3	-5	3,408	3393	0
Business	14.8	14.7	-1	34.1	34.0	0	3,308	3439	4

* all expenditure figures are in historic prices

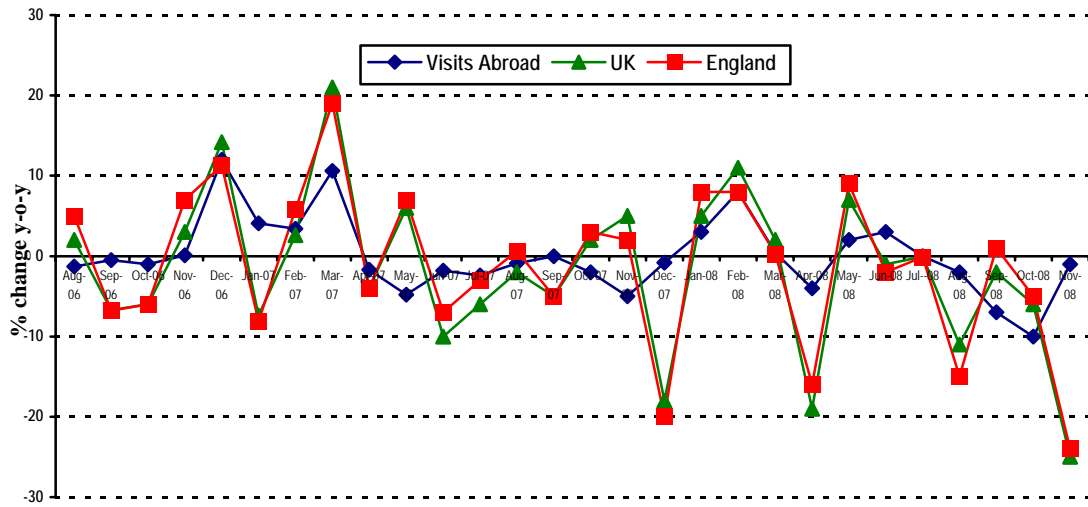
(5) Trips Abroad by UK Residents in November 2008

UK residents made 4.2m trips abroad in November 2008, representing a year-on-year decrease of -1%. Spend on overseas trips fell by -5% compared to the year before at £2.1bn during the month.

	Trips '07	Trips '08	Difference	Exp '07	Exp '08	Difference
Nov 2008	4.2m	4.2m	-1%	£2.0bn	£2.1bn	-5%
Jan-Nov '08	65.3m	65.1m	0%	£33.0bn	£34.7bn	+5%

Source: International Passenger Survey

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



Source: UKTS, International Passenger Survey

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

