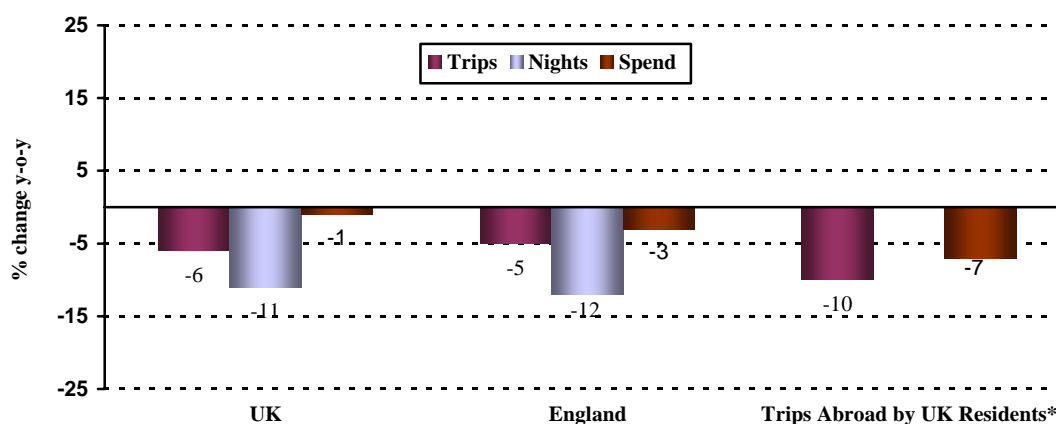


United Kingdom Tourism Survey – October 2008 Update

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



Source: UKTS, *International Passenger Survey

(2) October 2008

After a more stable September, domestic tourism declined in October. Domestic trips were slightly more resilient than international trips as the real onset of the credit crunch continued (a rescue package for the banking system was announced in October).

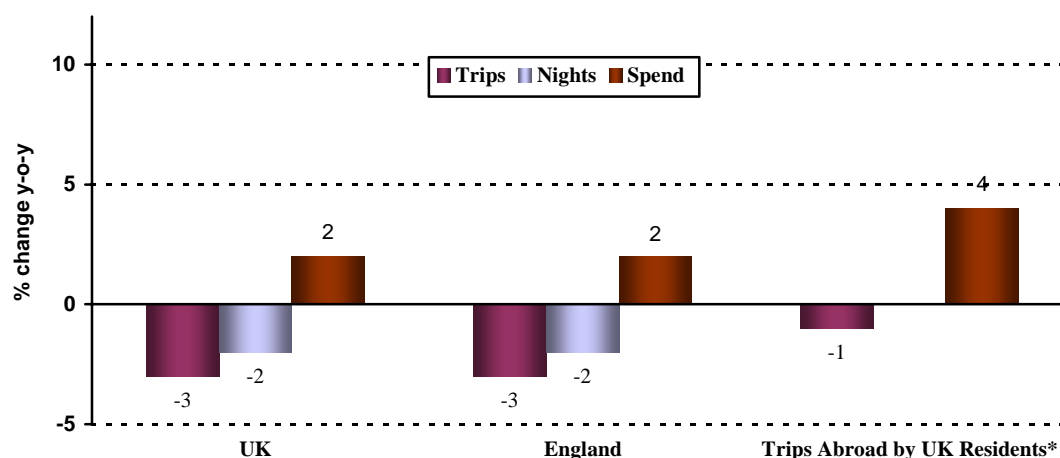
There were 10m overnight trips made in the UK by UK residents in October 2008, a decrease of -5% from the same month in 2007 – equivalent to 0.5m fewer trips. The number of bed nights fell by -11% to 27.86 during the month. The average length of stay dropped by -6% compared to the same month the year before from 2.98 to 2.79 nights. The value of overnight trips fell slightly by -1% during October and domestic overnight trips were worth £1.71bn during the month compared with £1.74bn in October 2007.

Average spend per night increased by 11% to £61 and average spend per trip increased by 4% to £172 compared to October 2007 (note this does not take into account inflation which was around +4% 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 driven by holiday trips and business trips, the smallest of the three categories, (-4.3% and -6.3% respectively), while VFR dropped the least (by -2.5%).

Within England there were 8.1m domestic overnight trips, -5% less than in October 2007 (equivalent to around 0.4m less trips) while nights and expenditure decreased by -12.8% and -2.9% respectively. Again, the decline in holiday trips (-4.3%) was greater than the fall in VFR.

	Trips (millions)	Nights (millions)	Spend (£ millions)	Average length of stay (nights)	Average spend per night (£s)	Average spend per trip (£s)
United Kingdom						
Total	10.00	27.86	1,712	2.8	61	172
Holiday	4.46	13.90	896	3.1	64	199
VFR	3.92	10.03	433	2.6	43	111
Business	1.46	3.60	360	2.4	100	240
England						
Total	8.08	21.78	1,323	2.7	61	164
Holiday	3.45	10.31	688	3.0	67	200
VFR	3.35	8.42	348	2.5	41	104
Business	1.15	2.72	266	2.4	98	231

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



Source: UKTS, International Passenger Survey

(4) Jan-October 2008

101.4m overnight trips were made in the UK by UK residents between January and October 2008, down -3% on the same period in 2007, while bed nights fell by -2% with 332.6m bed nights recorded. Expenditure increased by 2% to around £18.6bn compared to the first ten months of 2007 while average spend per trip increased by 5% to £172 (although again this doesn't take into account inflation).

In England, trips declined by -3% with VFR experiencing the steepest decline during the nine month period (-6%) compared to Jan-October 2007. Holiday trips fell by -3% while nights dropped by -5%.

Trips taken Jan-Oct 2008	Trips (Millions)			Bed nights (millions)			Expenditure (£ million)		
	2007	2008	% Change	2007	2008	% Change	2007*	2008	% Change
United Kingdom									
Total	104.3	101.4	-3	339.0	332.6	-2	18,219	18571	2
Holiday	48.0	47.0	-2	186.6	179.2	-4	10,182	10273	1
VFR	37.5	35.4	-6	105.0	102.2	-3	3,823	3923	3
Business	16.4	16.4	0	38.7	39.5	2	3,878	4042	4
England									
Total	84.5	81.8	-3	264.5	258.8	-2	14,138	14431	2
Holiday	37.1	36.1	-3	139.3	132.1	-5	7,775	7814	1
VFR	31.9	29.9	-6	87.2	84.6	-3	3,084	3138	2
Business	13.5	13.6	1	31.0	31.8	3	3,009	3199	6

* all expenditure figures are in historic prices

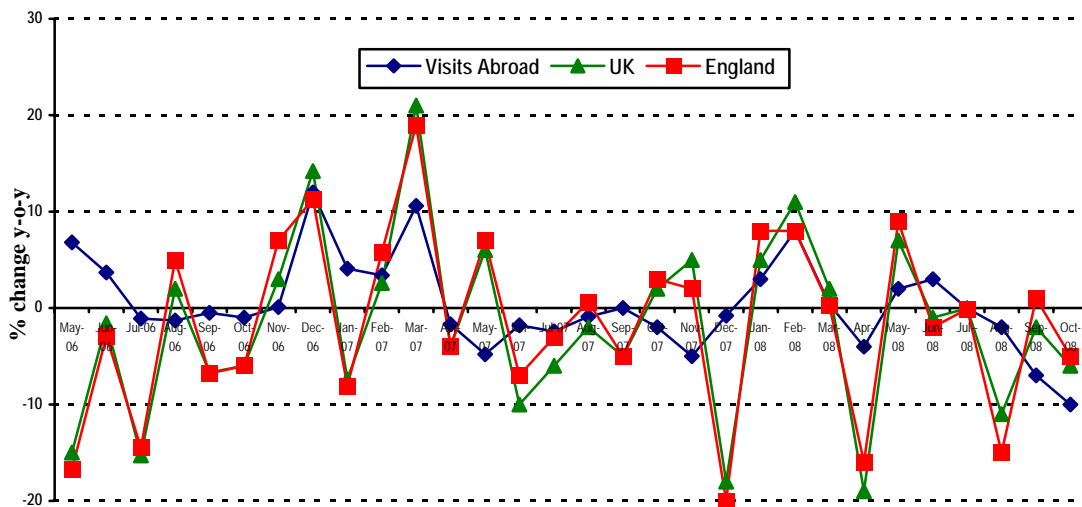
(5) Trips Abroad by UK Residents in October 2008

UK residents made 5.9m trips abroad in October 2008, representing a year-on-year decrease of -10%. Spend on overseas trips fell by -7% compared to the year before at £2.9bn during the month.

	Trips '07	Trips '08	Difference	Exp '07	Exp '08	Difference
Oct 2008	6.6m	5.9m	-10%	£3.1bn	£2.9bn	-7%
Jan-Oct '08	61.1m	60.7m	-1%	£31.0bn	£32.3bn	+4%

Source: International Passenger Survey

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



Source: UKTS, International Passenger Survey

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

