

UK TOURISM SURVEY - December 2009 SUMMARY OF RESULTS

1. Headlines

- In 2009, the number of UK domestic overnight trips grew by 7% and spend rose by 4%.
- Within England, trip numbers were up by 8% while expenditure rose by 5%.
- Bednights also rose during 2009 (+5% in the UK and +6% in England) compared to 2008.
- In December, domestic tourism trips in the UK grew by 11% compared to December 2008.
- During the month, the number of bednights rose by 7% and total expenditure grew by 10%.
- In England, trips were up by 11% during December while nights and spend also rose (+12% and +10% respectively).

2. Trip Characteristics

- In 2009 the number of trips grew by (+7%) overall. However, this increase has been driven by strong growth in "pure holiday" trips during the year (up by +17% in the UK and +18% in England). Within the month of December "pure holiday" trips continued to increase (7%).
- The increase in pure holiday trips has come from both longer and shorter breaks, with 1-3 and 4+ night holidays up by 18% and 16% respectively during the year.
- In 2009 business trips were down slightly compared with 2008 (-1% in the UK and England). However, in the last few months of 2009 business trips have started to stabilise, and rose from 1.1m to 1.4m in the month of December.
- The number of visits to friends and family in 2009 increased only marginally (by 1% in the UK and 2%) in England. However, specifically in the month of December, VFR trips rose by 9% in the UK and 11% in England.
- As a result of the growth in domestic holiday trips during 2009, the self-catering sector experienced a 26% increase in trips, while serviced accommodation grew by a comparatively small 6%, perhaps reflecting the decline in business travel at the beginning of 2009.

3. Overseas Travel by UK Residents

- In 2009, UK residents made 15% fewer trips abroad than in 2008, while spend was down by 13%. In the month of December 2009, UK residents' trips abroad fell by 16% compared with 2008 and they spent 11% less.

4. Other Tourism Surveys

- The UK Occupancy Survey showed that within serviced accommodation bedspace occupancy was at 35% for the month of December (2% higher than in December '08).
- The England Attractions Monitor showed that in the month of December visits to visitor attractions fell slightly by -1% compared with December '08.

KEY MEASURES



Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
December '09									
UK	9.8	10.9	11%	29.7	31.6	7%	£1,377	£1,519	10%
England	8.2	9.1	11%	23.4	26.3	12%	£1,088	£1,266	16%
Jan – Dec'09									
UK	117.7	126.0	7%	378.4	398.7	5%	£21,107	£21,881	4%
England	95.5	102.9	8%	295.4	312.9	6%	£16,433	£17,281	5%

Purpose of Trip – December 2009

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	2.7	2.9	7%	7.9	8.2	3%	£576	£631	10%
Business	1.1	1.4	33%	2.1	2.6	23%	£250	£321	28%
VFR	5.8	6.3	9%	19.3	20.5	6%	£528	£539	2%
England									
Holiday	2.2	2.3	7%	5.9	6.7	12%	£435	£524	20%
Business	1.0	1.2	25%	1.8	1.9	7%	£230	£269	17%
VFR	4.9	5.5	11%	15.4	17.4	13%	£405	£451	11%

Purpose of Trip – Year to Date (January – December 2009)

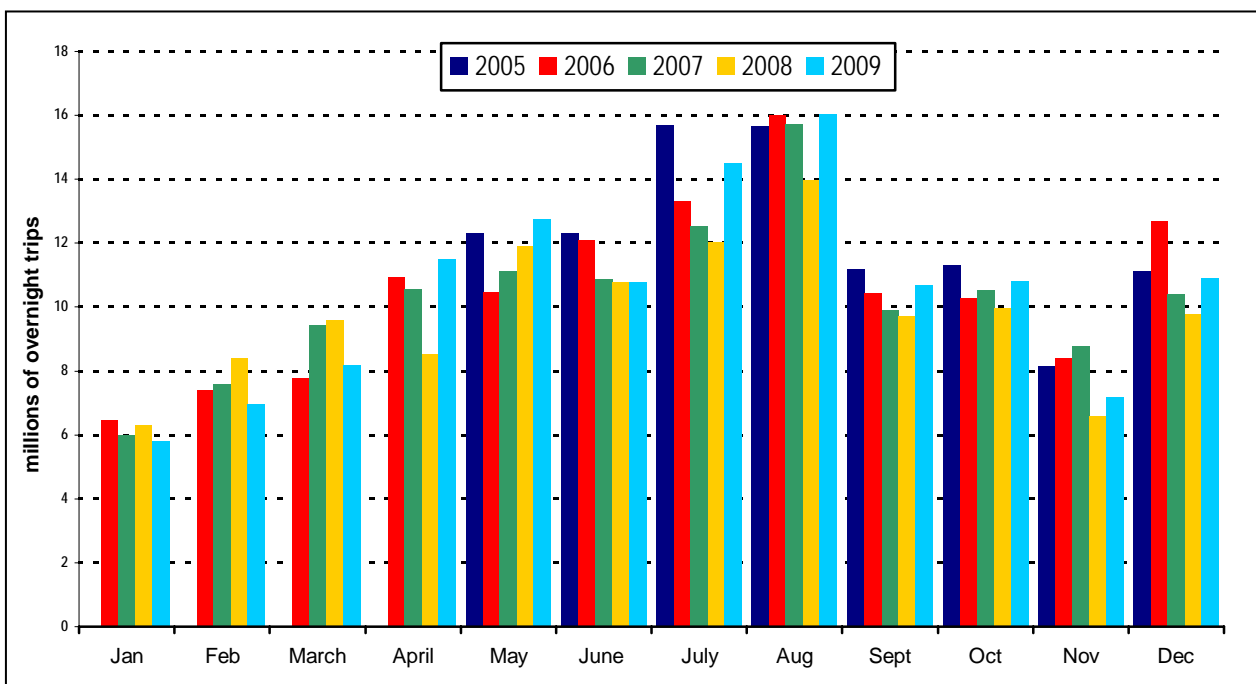
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	52.0	60.7	17%	193.1	222.5	15%	£11,388	£12,612	11%
Business	18.2	18.0	-1%	42.9	42.2	-2%	£4,483	£4,336	-3%
VFR	44.1	44.4	0.8%	128.3	125.7	-2%	£4,750	£4,509	-5%
England									
Holiday	40.0	47.3	18%	142.7	169.5	19%	£8,654	£9,741	13%
Business	15.2	15.0	-1%	34.9	33.6	-4%	£3,594	£3,516	-2%
VFR	37.4	38.2	2%	105.7	103.2	-2%	£3,798	£3,682	-3%

Outbound Travel – UK Residents

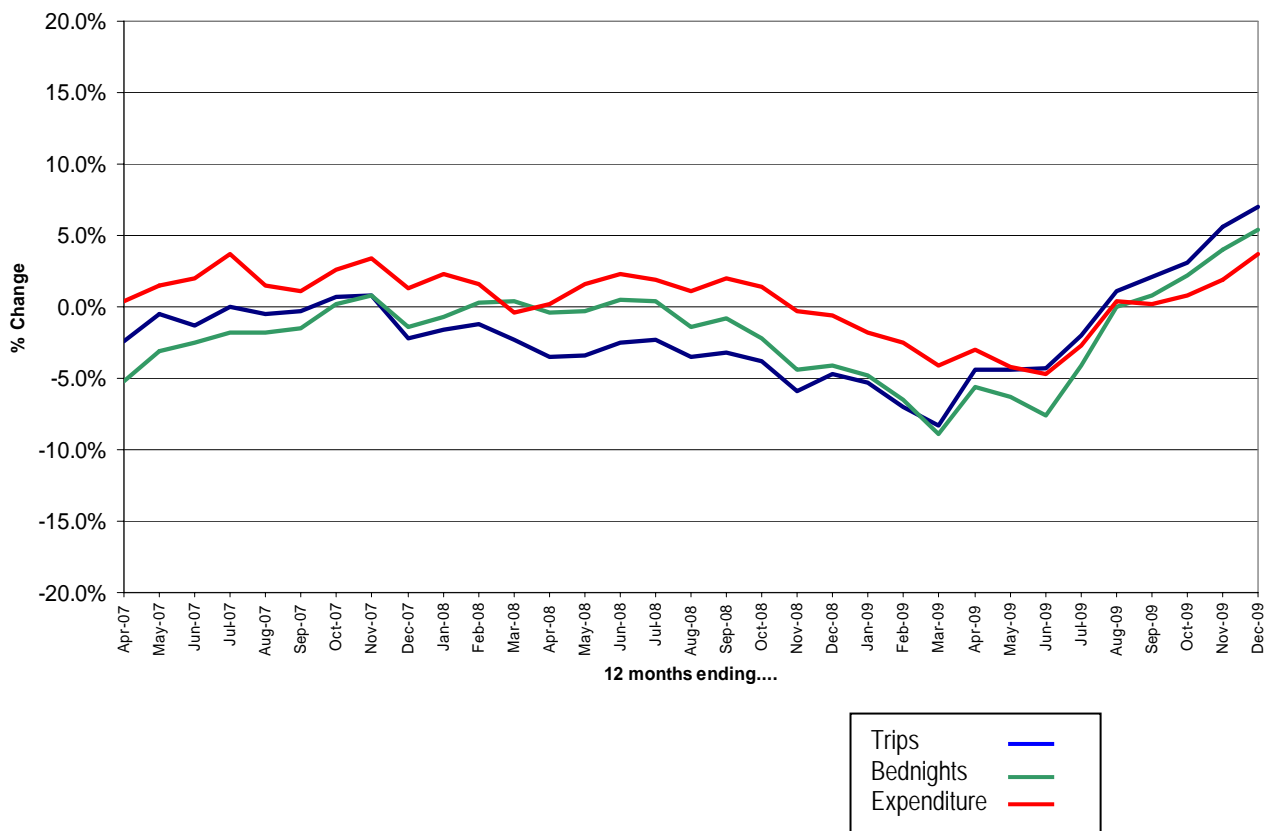
	TRIPS (MILLIONS)			SPEND (£BN)		
	2008	2009	% +/-	2008	2009	% +/-
December 2009	3.7	3.1	-16%	1.9	1.7	-11%
Jan – Dec '09	69.0	58.5	-15%	36.8	31.9	-13%

TREND CHARTS

UK All Trips – Domestic Trip Volume by Month



UK All Trips - Annual Percentage Change



Year on Year Comparison, by Trip Characteristic

Important Note

The analysis on the following page shows year-on-year comparisons across a number of trip characteristics, considering:

- Month (December 2008 vs December 2009)
- Year to date (January – December 2008 vs January – December 2009)

Percentage changes are colour coded:

Green indicates a change of over 5 percentage points **better** than the average across all trips (so a drop of -4% would be shaded green if all trips had declined by 10% over the same period)

Yellow indicates a change of within +/- 5 percentage points of the average

Orange indicates a change of more than 5 percentage points **worse** than the average

This analysis does **not necessarily indicate differences that are statistically significant**. For many of the categories included, particularly when reviewing single month data, changes would need to be much larger than the +/-5% cut-off point used to be statistically significant, and should always be reviewed in the context of the longer term trends. Even so, we feel that this analysis is helpful in understanding some of the market dynamics behind the overall monthly figures.

Sample sizes (underlying numbers of trips) are indicated on the spreadsheet – those with a very low base (fewer than 75 trips) have been “greyed out” to highlight that results should be treated with caution.

YEAR-ON-YEAR COMPARISON, BY TRIP CHARACTERISTIC

UKTS: Comparisons with equivalent periods, 2008

Comparisons with equivalent periods, 2008

LEGEND: Above Average Performance, Average Performance, Below Average Performance

NOTE: In the tables below, 'average performance' refers to the total trips/nights/expenditure to either UK or England in each time period. Those cells marked 'above average performance' indicate where the percentage change is more than 5 percentage points above the average; those marked 'below average performance' indicate where the percentage change is more than 5 percentage points below the average. These changes are not necessarily statistically significant - they only indicate those cells where changes are further away from the average. The numbers of unweighted trips are also displayed to indicate where sample sizes are relatively small. Where there are 75 or fewer unweighted trips, the % change figures have been greyed out to indicate that they should be treated with caution.

	United Kingdom													
	Month: December 2009			Unweighted Trips	YTD: January - December 2009			Unweighted Trips	2 month rolling January 2009 - December 2009			Unweighted Trips		
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure			
TOTAL	10.8%	6.5%	10.3%		7.0%	5.4%	3.7%		7.0%	5.4%	3.7%		18559	
PURPOSE:														
Pure Holiday	6.9%	3.3%	9.5%	315	16.7%	15.2%	10.7%	9284	16.7%	15.2%	10.7%	9284	9284	
- 1-3 nights holiday	9.6%	13.5%	5.0%	217	17.5%	16.2%	5.5%	5536	17.5%	16.2%	5.5%	5536	5536	
- 4+ nights holiday	-0.4%	-5.0%	19.2%	97	15.5%	14.7%	16.4%	3748	15.5%	14.7%	16.4%	3748	3748	
VFR (on holiday)	6.3%	1.1%	1.4%	489	0.8%	3.1%	-4.7%	3629	0.8%	3.1%	-4.7%	3629	3629	
HOLIDAY (TOTAL)	6.5%	1.9%	6.6%	804	11.8%	11.8%	7.8%	12913	11.8%	11.8%	7.8%	12913	12913	
VFR (non-holiday)	13.7%	16.1%	2.8%	286	0.7%	-8.8%	-5.5%	3060	0.7%	-8.8%	-5.5%	3060	3060	
VFR (TOTAL)	9.1%	6.0%	2.1%	774	0.8%	-2.0%	-5.1%	6689	0.8%	-2.0%	-5.1%	6689	6689	
Business	33.1%	23.1%	28.4%	102	-1.4%	-1.6%	-3.3%	2166	-1.4%	-1.6%	-3.3%	2166	2166	
RDAs:														
Adv West Midlands	32.3%	39.9%	136.6%	98	8.8%	-2.9%	5.7%	1179	8.8%	-2.9%	5.7%	1179	1179	
East of England	42.7%	5.3%	31.8%	125	15.0%	8.4%	3.5%	1589	15.0%	8.4%	3.5%	1589	1589	
East Midlands	-1.1%	18.3%	4.5%	80	6.6%	-1.8%	-0.8%	1139	6.6%	-1.8%	-0.8%	1139	1139	
London	4.5%	-6.0%	-3.0%	118	-4.6%	-13.1%	-5.3%	1492	-4.6%	-13.1%	-5.3%	1492	1492	
North West	35.4%	53.7%	32.9%	146	5.8%	4.2%	3.5%	1975	5.8%	4.2%	3.5%	1975	1975	
ONE North East	-29.4%	21.6%	10.8%	44	-5.9%	-4.5%	-13.9%	541	-5.9%	-4.5%	-13.9%	541	541	
South East England	7.8%	9.8%	7.1%	170	12.0%	11.2%	10.4%	2753	12.0%	11.2%	10.4%	2753	2753	
South West	5.7%	5.5%	-4.1%	178	11.0%	14.3%	13.3%	3200	11.0%	14.3%	13.3%	3200	3200	
Yorkshire Forward	-18.6%	-10.5%	8.1%	80	11.2%	11.4%	10.2%	1577	11.2%	11.4%	10.2%	1577	1577	
LOCATION TYPE:														
Seaside	25.9%	11.4%	10.9%	142	17.6%	18.7%	14.4%	4306	17.6%	18.7%	14.4%	4306	4306	
Large city/ large town	14.8%	15.2%	10.9%	533	5.3%	-4.2%	-3.9%	6882	5.3%	-4.2%	-3.9%	6882	6882	
Small town	-3.9%	-12.5%	11.4%	324	-0.1%	-0.8%	1.6%	4231	-0.1%	-0.8%	1.6%	4231	4231	
Countryside/ village	18.5%	18.3%	5.7%	229	10.5%	12.4%	11.9%	3642	10.5%	12.4%	11.9%	3642	3642	
AGE:														
16-24	-27.2%	-17.8%	-30.3%	110	-5.1%	-15.1%	-11.5%	2010	-5.1%	-15.1%	-11.5%	2010	2010	
25-34	33.4%	-12.6%	24.6%	223	11.0%	-26.1%	7.7%	2966	11.0%	-26.1%	7.7%	2966	2966	
35-44	13.6%	-2.2%	16.1%	241	10.5%	10.0%	4.4%	4119	10.5%	10.0%	4.4%	4119	4119	
45-54	3.0%	19.7%	-6.7%	201	8.8%	13.1%	5.8%	3221	8.8%	13.1%	5.8%	3221	3221	
55+	19.9%	11.2%	29.5%	431	6.5%	4.1%	5.3%	6243	6.5%	4.1%	5.3%	6243	6243	
SEG:														
AB	-4.8%	-9.8%	-6.0%	350	5.2%	4.1%	-0.9%	5984	5.2%	4.1%	-0.9%	5984	5984	
C1	23.2%	7.3%	30.4%	395	7.6%	9.5%	11.4%	5785	7.6%	9.5%	11.4%	5785	5785	
C2	-1.3%	3.8%	-6.8%	183	6.0%	-1.6%	-2.4%	3225	6.0%	-1.6%	-2.4%	3225	3225	
DE	46.7%	48.4%	40.1%	278	11.6%	7.8%	7.4%	3565	11.6%	7.8%	7.4%	3565	3565	
CHILDREN IN H/H:														
Any	16.0%	9.0%	-9.0%	420	9.5%	10.8%	3.1%	6458	9.5%	10.8%	3.1%	6458	6458	
None	8.7%	5.6%	18.4%	786	5.9%	3.0%	3.9%	12101	5.9%	3.0%	3.9%	12101	12101	
ACCOMMODATION:														
Commercial accom	12.6%	5.8%	16.1%	426	10.3%	9.1%	5.5%	10545	10.3%	9.1%	5.5%	10545	10545	
- Serviced accom	10.8%	0.9%	12.9%	351	5.8%	3.0%	0.0%	6853	5.8%	3.0%	0.0%	6853	6853	
- Hotel/motel/guesthouse	15.5%	9.6%	16.7%	331	6.0%	2.8%	-0.8%	6044	6.0%	2.8%	-0.8%	6044	6044	
- Bed & Breakfast	-33.6%	-46.7%	-27.9%	20	2.2%	4.2%	7.2%	844	2.2%	4.2%	7.2%	844	844	
Total self-catering rented	24.3%	18.6%	18.4%	56	25.4%	22.2%	21.3%	3376	25.4%	22.2%	21.3%	3376	3376	
- Camping & Caravanning (inc. owned caravans)	46.5%	68.2%	69.2%	21	20.4%	15.9%	15.0%	2668	20.4%	15.9%	15.0%	2668	2668	
- Other self-catering rented	22.0%	10.8%	12.8%	40	26.3%	23.7%	23.7%	1302	26.3%	23.7%	23.7%	1302	1302	
Hostels	53.7%	13.5%	157.1%	11	-10.6%	-21.0%	-2.5%	221	-10.6%	-21.0%	-2.5%	221	221	
Own home/friends/relatives'	10.7%	6.5%	3.0%	767	3.4%	0.7%	-1.5%	7800	3.4%	0.7%	-1.5%	7800	7800	

	England													
	Month: December 2009			Unweighted Trips	YTD: January - December 2009			Unweighted Trips	2 month rolling January 2009 - December 2009			Unweighted Trips		
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure			
TOTAL	11.0%	12.4%	16.4%		7.8%	5.9%	5.2%		7.8%	5.9%	5.2%		15163	
PURPOSE:														
Pure Holiday	6.7%	12.4%	20.5%	251	18.1%	18.8%	12.6%	7239	18.1%	18.8%	12.6%	7239	7239	
- 1-3 nights holiday	5.6%	12.3%	13.7%	173	17.9%	17.1%	4.3%	4357	17.9%	17.1%	4.3%	4357	4357	
- 4+ nights holiday	10.0%	12.5%	34.3%	77	18.5%	19.7%	22.2%	2876	18.5%	19.7%	22.2%	2876	2876	
VFR (on holiday)	9.1%	11.0%	19.7%	414	3.1%	3.2%	0.5%	3077	3.1%	3.2%	0.5%	3077	3077	
HOLIDAY (TOTAL)	8.1%	11.5%	20.4%	664	13.2%	14.2%	10.2%	10315	13.2%	14.2%	10.2%	10315	10315	
VFR (non-holiday)	13.5%	17.5%	-1.9%	255	1.1%	-9.4%	-7.5%	2674	1.1%	-9.4%	-7.5%	2674	2674	
VFR (TOTAL)	10.8%	13.3%	11.4%	670	2.1%	-2.4%	-3.1%	5752	2.1%	-2.4%	-3.1%	5752	5752	
Business	25.3%	6.9%	17.0%	85	-1.0%	-3.6%	-2.2%	1813	-1.0%	-3.6%	-2.2%	1813	1813	
RDAs:														
Adv West Midlands	32.3%	39.9%	136.6%	98	8.8%	-2.9%	5.7%	1179	8.8%	-2.9%	5.7%	1179	1179	
East of England	42.7%	5.3%	31.8%	125	15.0%	8.4%	3.5%	1589	15.0%	8.4%	3.5%	1589	1589	
East Midlands	-1.1%	18.3%	4.5%	80	6.6%	-1.8%	-0.8%	1139	6.6%	-1.8%	-0.8%	1139	1139	
London	4.5%	-6.0%	-3.0%	118	-4.6%	-13.1%	-5.3%	1492	-4.6%	-13.1%	-5.3%	1492	1492	
North West	35.4%	53.7%	32.9%	146	5.8%	4.2%	3.5%	1975	5.8%	4.2%	3.5%	1975	1975	
ONE North East	-29.4%	21.6%	10.8%	44	-5.9%	-4.5%	-13.9%	541	-5.9%	-4.5%	-13.9%	541	541	
South East England	7.8%	9.8%	7.1%	170	12.0%	11.2%	10.4%	2753	12.0%	11.2%	10.4%	2753	2753	
South West	5.7%	5.5%	-4.1%	178	11.0%	14.3%	13.3%	3200	11.0%	14.3%	13.3%	3200	3200	
Yorkshire Forward	-18.6%	-10.5%	8.1%	80	11.2%	11.4%	10.2%	1577	11.2%	11.4%	10.2%	1577	1577	
LOCATION TYPE:														
Seaside	22.6%	7.7%	10.1%	115	19.6%	21.7%	16.0%	3411	19.6%	21.7%	16.0%	3411	3411	
Large city/ large town	14.7%	20.1%	17.3%	461	5.4%	-4.7%	-2.8%	5830	5.4%	-4.7%	-2.8%	5830	5830	
Small town	1.1%	0.4%	19.9%	276	1.4%	1.3%	4.8%	3418	1.4%	1.3%	4.8%	3418	3418	
Countryside/ village	12.7%	17.6%	10.7%	184	11.3%	11.2%	12.4%	2894	11.3%	11.2%	12.4%	2894	2894	
AGE:														
16-24	-35.5%	-7.9%	-30.9%	85	-7.9%	-18.4%	-13.4%	1650	-7.9%	-18.4%	-13.4%	1650	1650	
25-34	28.0%	18.3%	30.5%	181	14.3%	16.0%	8.6%	2447	14.3%	16.0%	8.6%	2447	2447	
35-44	10.0%	-0.4%	26.3%	197	11.7%	10.2%	9.0%	3337	11.7%	10.2%	9.0%	3337	3337	
45-54	7.7%	24.7%	-5.3%	173	8.0%	10.7%	5.9%	2560	8.0%	10.7%	5.9%	2560	2560	
55+	28.0%	20.5%	38.1%	383	8.3%	6.6%	7.2%	5182	8.3%	6.6%	7.2%	5182	5182	
SEG:														
AB	-1.3%	-5.5%	10.3%	310	5.7%	2.6%	1.1%	4937	5.7%	2.6%	1.1%	4937	4937	
C1	16.3%	8.8%	28.3%	317	5.8%	9.7%	9.4%	4714	5.8%	9.7%	9.4%	4714	4714	
C2	1.0%	20.0%	1.1%	154	10.0%	2.7%	2.6%	2643	10.0%	2.7%	2.6%	2643	2643	
DE	51.7%	58.1%	26.3%	232	15.0%	9.1%	10.7%	2853	15.0%	9.1%	10.7%	2853	2853	
CHILDREN IN H/H:														