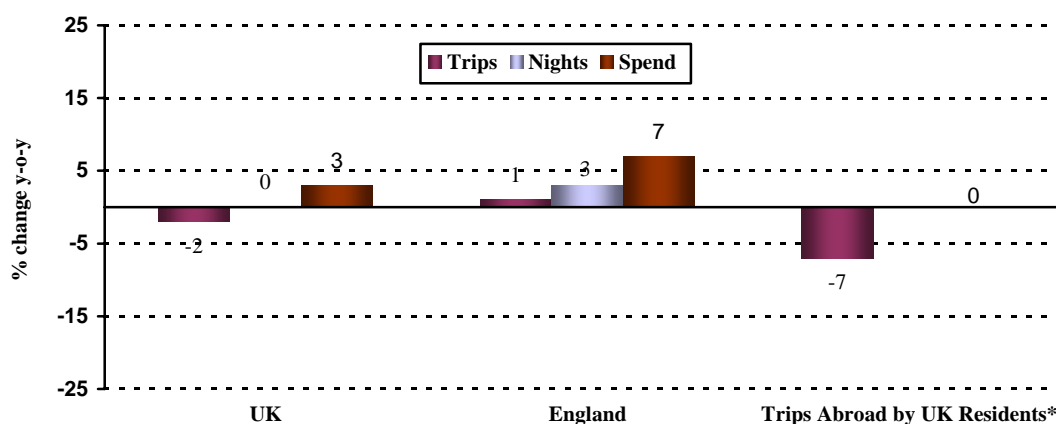


United Kingdom Tourism Survey – September 2008 Update

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



Source: UKTS, *International Passenger Survey

(2) September 2008

After a disappointing July and August, September was more stable for UK domestic tourism which proved to be more resilient than international trips to the real onset of the credit crunch (the banking crisis became much more severe in September).

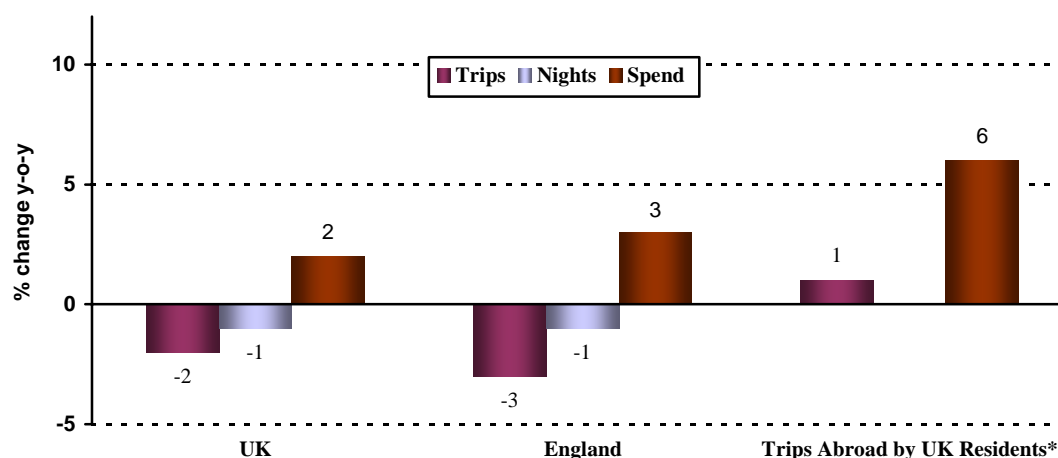
There were 9.7m overnight trips made in the UK by UK residents in September 2008, a marginal decrease of -2% from the same month in 2007 – equivalent to 0.2m fewer trips. The number of bed nights was unchanged at 30.08 during the month. The average length of stay increased by 1.7% compared to the same month the year before from 3.04 to 3.09 nights.

The value of overnight trips rose by 3% during September and domestic overnight trips were worth £1.87bn during the month compared with £1.81bn in September 2007. Average spend per night increased by 4% to £62 and average spend per trip increased by 5% to £192 compared to September 2007 (note this does not take into account inflation which was around +5% at the time). The overall decline was driven by holiday trips and VFR trips (-2.9% and -0.9% respectively), while business trips, the smallest of the three categories, increased slightly (by 2.9%).

Within England there were 8.0m domestic overnight trips 1% more than in September 2007 (equivalent to around 0.1m more trips) while nights and expenditure increased by 3.0% and 6.6% respectively. Visits to friends and family rose slightly though holiday visits fell by 3.8% on the same period last year.

	Trips (millions)	Nights (millions)	Spend (£ millions)	Average length of stay (nights)	Average spend per night (£)	Average spend per trip (£)
United Kingdom						
Total	9.72	30.08	1,871	3.1	62	192
Holiday	4.66	16.88	1,034	3.6	61	222
VFR	3.17	8.25	361	2.6	44	114
Business	1.75	4.36	455	2.5	104	260
England						
Total	7.97	24.41	1,487	3.1	61	187
Holiday	3.56	13.19	796	3.7	60	224
VFR	2.84	7.19	323	2.5	45	114
Business	1.46	3.51	354	2.4	101	242

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



Source: UKTS, International Passenger Survey

(4) Jan-Sept 2008

91.4m overnight trips were made in the UK by UK residents between January and September 2008, down -2% on the same period in 2007, while bed nights fell by -1% with 304.7m bed nights recorded. Expenditure increased by 2% to around £17bn compared to the first nine months of 2007 while average spend per trip increased by 1% to £185 (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 (-7%) compared to Jan-September 2007. Holiday trips fell by -3% while nights dropped by -4%.

Trips taken Jan-Sept 2008	Trips (Millions)			Bed nights (millions)			Expenditure (£ million)		
	2007	2008	% Change	2007	2008	% Change	2007*	2008	% Change
United Kingdom									
Total	93.7	91.4	-2	307.6	304.7	-1	16,483	16859	2
Holiday	43.3	42.6	-2	170.8	165.3	-3	9,273	9377	1
VFR	33.5	31.5	-6	94.4	92.2	-2	3,362	3490	4
Business	14.8	14.9	1	35.0	35.9	3	3,533	3682	4
England									
Total	76.0	73.7	-3	239.6	237.0	-1	12,775	13108	3
Holiday	33.6	32.7	-3	127.5	121.8	-4	7,078	7127	1
VFR	28.5	26.6	-7	78.3	76.2	-3	2,711	2790	3
Business	12.1	12.4	2	27.9	29.1	4	2,732	2934	7

* all expenditure figures are in historic prices

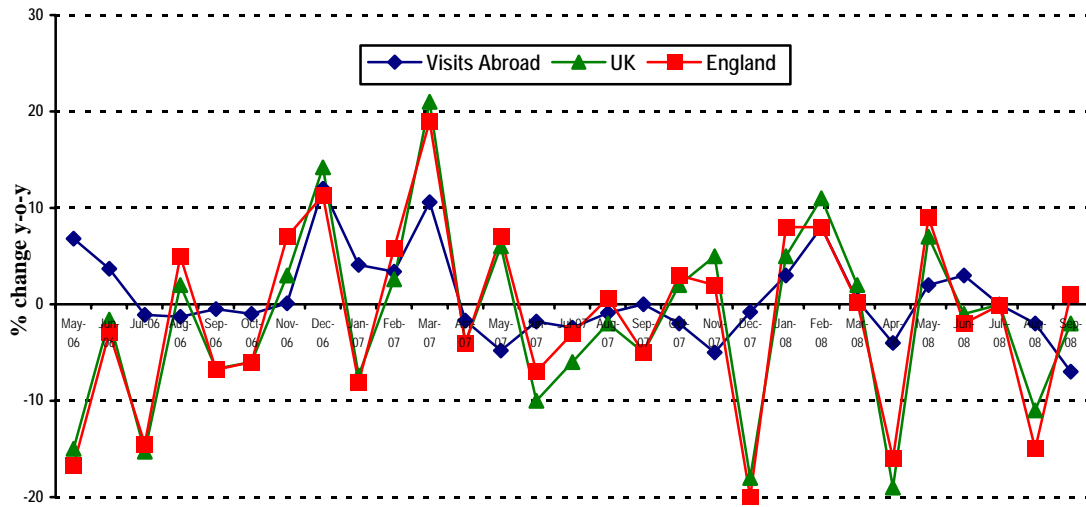
(5) Trips Abroad by UK Residents in September 2008

UK residents made 7.0m trips abroad in September 2008, representing a year-on-year decrease of -7%. Spend on overseas trips remained unchanged compared to the year before at £3.9bn during the month.

	Trips '07	Trips '08	Difference	Exp '07	Exp '08	Difference
Sept 2008	7.5m	7.0m	-7%	£3.9bn	£3.9bn	+0%
Jan-Sept '08	54.5m	54.8m	+1%	£27.8bn	£29.4bn	+6%

Source: International Passenger Survey

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



Source: UKTS, International Passenger Survey

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

