

Key Tourism Facts Updated September 2010



The big picture

Tourism is one of the largest industries in the UK.

According to a recent Deloitte study 'The Economic Contribution of the Visitor Economy – UK and the nations' tourism was worth £115.4bn to the UK economy in 2009 once the direct and indirect impacts are taken into account, equivalent to 8.9% of UK Gross Domestic Product.

The Deloitte study found that tourism would account for a similar proportion of the overall UK economy in 2020 as it did in 2008 (8.8%).

The number of jobs that tourism supports is forecast to increase by 250,000 between 2010 and 2020, from 2.645 million to 2.899 million.

One in twelve jobs in the UK is currently either directly or indirectly supported by tourism.

The long-run GVA growth rate of the visitor economy is forecast to be 3.5% per annum over the period 2010 to 2020, well ahead of the 2.9% forecast for the economy as a whole.

Tourism expenditure is forecast to grow at an annual real growth rate of 3.0% per annum over the period 2010 to 2020 according to Deloitte, with spending by inbound visitors forecast to grow at a faster rate than spending by domestic residents (4.4% versus 2.6%).

Tourism is the UK's third highest export earner behind Chemicals and Financial Services, with inbound visitors spending more than £16bn annually and contributing over £3bn to the Exchequer.

The 'direct' effect of spending by tourists is estimated at £90bn in 2009, comprised as follows:

Spending by Overseas Residents	£ billion
Visits to the UK	16.6
Fares to UK carriers	2.9

Spending by Domestic Residents	£ billion
Trips of 1+ nights	22.2
Day Trips	47.6
Rent for Second Ownership	1.0

Inbound Tourism to the UK

The 29.9 million overseas visitors who came in 2009 spent £16.6 billion in the UK. These figures represent a 6% decline in volume and 2% (nominal) increase in value compared with 2008.

In 2009 the UK ranked seventh in the international tourism earnings league (compared with sixth in 2007) behind the USA, Spain, France, Italy, China and Germany according to UNWTO figures.

The UK now accounts for 3.5% of international tourism receipts (3.8% in 2008).

In 2009 the UK ranked sixth in the international tourist arrivals league behind France, USA, Spain, China and Italy. The UK now accounts for 3.2% of international arrivals (3.3% in 2008).

Top inbound markets for the UK in 2009

	Visits (000s)	% total		Spend (£m)	% total
France	3,784	13%	USA	2,173	13%
Irish Republic	2,948	10%	Germany	1,167	7%
USA	2,877	10%	France	1,151	7%
Germany	2,780	9%	Irish Republic	1,038	6%
Spain	2,164	7%	Spain	1,001	6%
Netherlands	1,715	6%	Australia	856	5%
Italy	1,221	4%	Netherlands	599	4%
Poland	1,041	3%	Italy	591	4%
Australia	912	3%	Canada	408	2%
Belgium	903	3%	Switzerland	382	2%

Outbound tourism by UK residents fell by 15% in 2009 in terms of trips and 14% in terms of spending.

This resulted in the UK's international tourism balance of payments deficit falling to £15.1bn in 2009 from £20.5bn in 2008.

UK Domestic Overnight Tourism

In 2009 UK residents took:

- 60.7 million holidays of one night or more spending £12.6 billion
- 18.0 million overnight business trips spending £4.3 billion
- 44.4 million overnight trips to friends and relatives spending £4.5 billion

Overall the number of domestic overnight trips taken in 2009 was 126 million, 7% higher than in 2008, while total spending increased by 4% in nominal terms to £21.9bn.

Accommodation

In 2009, average room occupancy for all serviced accommodation throughout the UK was 58% (down 2 percentage points from 2008). Average bedspace occupancy was 43% (a decrease of 1 percentage point on 2008).

According to Eurostat the number of bedspaces (that is the total number of persons who can stay) in UK 'hotels and similar establishments' was 1,176,000 in 2008.

Furthermore, Eurostat estimate that the number of bedspaces in 'other collective accommodation establishments' (including holiday dwellings and tourist campsites) in the UK was 1,667,000 in 2008.

In total therefore the UK has a tourist accommodation 'bedspace' stock capable of sleeping around 2.9 million people.

Attractions

Among visitor attractions who are members of the Association of Leading Visitor Attractions the top five attractions in 2009 were:

	million
British Museum	5.6
The National Gallery	4.8
Tate Modern	4.7
Natural History Museum	4.1
Science Museum (South Kensington)	2.8