



# INTELLIGENCE UPDATE

Research & Intelligence - Keeping you in the picture

TOURISM  
SOUTH EAST

## Latest facts & figures

February 2015 Edition

### Tourism volume and value

#### Domestic overnight tourism – results up to October 2014

The volume of domestic overnight trips taken in England during October 2014 fell slightly compared with October 2013 (trips down 3%, nights down 9%) however spend was up by 8%. Holiday trips in England were down 10% compared with October 2013, although VFR trips increased by 9% and business trips were up 6%. The South East also saw a fall in the volume of domestic overnight trips in October, but a significant increase in spend (Table 1).

Looking at the January to October period, domestic overnight trips to the South East were down 12% compared with the same period in 2013, while trips within England as a whole over this period were down 8%. Expenditure over the January to October period was down 9% in the South East, while visitor spend in England decreased by 3% over the same period.

**Table 1: Volume and value of Domestic Overnight Visitors (comparison with 2013)**

	Month: October 2014			Year to date: Jan to Oct 2014		
	Trips	Nights	Spend	Trips	Nights	Spend
<b>South East</b>	-14.1%	-11.1%	28.4%	-12.3%	-15.1%	-9.2%
<b>England</b>	-2.6%	-9.3%	7.8%	-7.7%	-9.0%	-3.4%

Source: Great Britain Tourism Survey

Although comparisons are available for October, actual figures for the South East are only available up to September 2014.

The results for the whole of Q3 (July to September) reflect a significant decrease in performance compared with the exceptionally strong summer of 2013, both for the South East and England as a whole (Table 2a). Holiday trips in the South East were down 13% and VFR trips were down 11% compared with results for Q3 of 2013. The value of VFR trips in the South East was steady (up 2%), however, the value of holiday trips was 15% lower than Q3 in 2013.

**Table 2a: Volume and value of Domestic Tourism – July to September**

	Trips (millions)			Bednights (millions)			Expenditure (£ millions)		
	2013	2014	% change	2013	2014	% change	2013	2014	% change
<b>South East</b>	5.797	4.883	-15.8%	19.481	15.392	-21.0%	£984	£822	-16.5%
<b>England</b>	32.664	29.063	-11.0%	112.70	99.470	-11.7%	£6,648	£6,357	-4.4%

Source: Great Britain Tourism Survey

The average duration of trips in the South East during Q3 was 3.15 nights (3.36 nights during Q3 of 2013), with an average spend per trip of £168 (down 1% compared with Q3 in 2013).



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Volume and value data for England and the South East for the January to September period is shown in Table 2b. The figures indicate a challenging year for England as a whole, with particularly disappointing results for the South East.

**Table 2b: Volume and value of Domestic Tourism – YTD: January to September**

	Trips (millions)			Bednights (millions)			Expenditure (£ millions)		
	2013	2014	% change	2013	2014	% change	2013	2014	% change
<b>South East</b>	13.411	11.845	-11.7%	38.118	32.377	-15.1%	£2,102	£1,844	-12.3%
<b>England</b>	76.729	70.408	-8.2%	230.23	209.72	-8.9%	£14,658	£14,002	-4.5%

Source: Great Britain Tourism Survey

## Overseas Visitors – national results up to December 2014

Recently released provisional figures from the International Passenger Survey (IPS) show that overseas visits to the UK during December were similar to December 2013 (0%), while visitor spend was up 3% compared with December 2013. Inbound holiday trips were up 10% and business trips up 4%, however these increases were offset by a fall of 10% in VFR trips compared with December 2013.

Over the full year (January to December 2014), inbound trips to the UK were up 6% compared with 2013, while visitor spend increased by 3%. Inbound holiday trips were up 8% compared with 2013, while VFR and business trips both increased by 5% over the year.

UK residents took 2% more overseas trips during the three months covering October to December 2014 compared with the same period in 2013, and spent 2% more on overseas trips than this time last year.

## Overseas Visitors – South East results for Q3

Although national comparisons are available up to November, figures for the South East have only recently been released for the third quarter of 2014.

During Q3 of 2014 (July to September) 1,518,000 overnight trips were made to the South East by overseas visitors, a fall of 4% compared with the same period in 2013. Visitor nights were up by 1% (to 12,438,000 nights), and trip expenditure was up by 7% (to £826 million) compared with Q3 in 2013.

**Table 3a: Volume and value of Overseas Visitors – Q3 (July to September)**

	South East			England		
	2013	2014 Provisional	% change 2013/14	2013	2014 Provisional	% change 2013/14
<b>Total Visits (000)</b>	1,587	1,518	-4%	8,520	8,760	+3%
<b>Total Nights (000)</b>	12,329	12,438	+1%	78,613	78,487	0%
<b>Total Spend (£m)</b>	£769	£826	+7%	£6,107	£6,206	+2%

Source: International Passenger Survey

Holiday trips to the South East were down 11% during Q3 (590,000 trips), while VFR trips were down 1% (501,000 trips) and business trips were down 2% compared with Q3 in 2012 (265,000 trips). For England as a whole, the modest increase in trips during Q3 appears to be driven by an increase in business trips (up11%) while VFR trips increased by 3% and holiday trips to England remained static (0%).



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Overseas visitors to the South East spent more on business trips compared with Q3 in 2013 (up 40%), however, spend on VFR trips in the South East was down 8% compared with Q3 2013 and spend on holiday trips in the South East was static (up 1%).

Due to the four month time lag in the publication of regional data from the International Passenger Survey, regional data for trips made by overseas visitors during Q4 of 2014 (October to December) will be reported on in a future Intelligence Update.

Overseas visitor figures for the first three quarters of the year (January to September) indicate a 3% increase in trips to the South East and a 5% increase in overseas visitor spend (Table 3b). Although England enjoyed a 7% increase in trips over the first three quarters of 2014, visitor expenditure in England increased by a relatively modest 4% over the same period.

**Table 3b: Volume and value of Overseas Visitors – Year to Date (January to September)**

	South East			England		
	2013	2014 Provisional	% change 2013/14	2013	2014 Provisional	% change 2013/14
<b>Total Visits (000)</b>	3,642	3,735	+3%	21,744	23,168	+7%
<b>Total Nights (000)</b>	26,329	27,352	+4%	169,366	183,931	+9%
<b>Total Spend (£m)</b>	1,622	1,708	+5%	13,963	14,535	+4%

Source: International Passenger Survey

The average expenditure per trip for overseas visitors to the South East over the first three quarters of 2014 (average £457 per trip) was slightly higher than over the same period in 2013 (average £444 per trip).

## Tourism Day Visits in England – national results up to December 2014

Latest headline figures released from VisitEngland's GB Day Visits Survey indicate that 339 million Tourism Day Visits were taken in England between October and December 2014, with a value of £11,755 million. The volume of trips was up 1% compared with the same period in 2013, however the value of day visitor spend increased by 3%.

Over the year as a whole, the volume and value of tourism day trips in England decreased by 2% compared with the same period in 2013.

**Table 3: Volume and value of Domestic Tourism Day Visits in England**

	October to December			Year to date: January to December		
	2013	2014	% change	2013	2014	% change
<b>Volume of visits (millions)</b>	336	339	+1%	1,370	1,345	-2%
<b>Value of visits (£ millions)</b>	11,375	11,755	+3%	46,024	45,101	-2%

Source: Great Britain Day Visits Survey

Tourism day visit figures for the South East are not expected to become available until around May this year, however, the 2013 report indicates that 245.3 million tourism day visits were made to the South East in 2013 with an overall value of £7,547 million.



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## Tourism Business Monitor:

The latest Tourism Business Monitor prepared by Visit England shows that the majority of participating attractions and accommodation providers (68% of attractions and 64% accommodation businesses) saw an increase in visitor/guest numbers over the whole of 2014 compared with 2013. Fifteen percent of attractions and 16% of accommodation providers reported that visitor numbers were about the same, while around a fifth of participating businesses reported that visitor numbers were down in 2014 compared with 2013.

Looking ahead, 95% of attractions were 'very confident' (45%) or 'fairly confident' (51%) about the period up to Easter 2015. Accommodation businesses were slightly less confident about the outlook for the first part of this year (32% 'very confident' and 54% 'fairly confident').

The full survey findings and commentary on the results can be accessed via the following links:

Tourism Business Monitor January 2015: [Accommodation report](#) (36 pages)  
[Attractions report](#) (35 pages)

## Recently released reports:

**Domestic Leisure Tourism Trends for the Next Decade** (published by VisitEngland in December 2013) identifies trends in domestic leisure tourism and looks at factors that are likely to influence visitors in the years ahead. Businesses are invited to discuss the trends identified in the report via a dedicated microsite: <http://www.visitenglandtrends.com>

The Future Trends report (20 pages) can be downloaded [here](#).

**Inbound tourism forecasts for 2015** (prepared by Visit Britain) are predicting 2.5% growth in volume and 4.5% growth in the value of inbound tourism this year. [Click here](#) to read more.

The January 2015 issue of **Foresight** (published by VisitBritain) looks at the types of holiday activities of interest to potential visitors to Britain from overseas. [Click here](#) to access this report (12 pages).

The December 2014 issue of **Foresight** examines the draw of Britain's culture and heritage to visitors from overseas. [Click here](#) to access this report (10 pages).

Further Foresight reports offering insight into various aspects of the inbound visitor market can be found [here](#).

If you have any queries regarding the *Intelligence Update*, or require any additional Market Intelligence, please contact Parves Khan (Head of Research) [pkhan@tourismse.com](mailto:pkhan@tourismse.com) or phone (02380 625459).

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