



INTELLIGENCE UPDATE

Research & Intelligence - Keeping you in the picture

TOURISM
SOUTH EAST

DECEMBER 2010 EDITION

Latest facts & figures

Tourism volume and value

In the month of July, the number of domestic overnight tourism trips in England was 9% lower than the same month of 2009, while nights and spend fell by 7% and 8% respectively.

Between January and July 2010, the number of overnight trips taken in England was 4% lower than in the first seven months of 2009, with 8% fewer bednights and a 7% reduction in spend.

Regional results for this period show a 4.2% reduction in the volume of domestic overnight trips to the South East over the first seven months of the year compared to last year. Trips also shortened in length leading to a 10% fall in bednights. Trip expenditure dropped by 8.9% compared to 2009.

However, the results need to be reviewed in the context of a boom in domestic tourism in 2009. Compared to the same seven months in 2008, the volume of trips has actually increased by 4.4% and the number of nights spent is similar in volume. Trip expenditure, however, is 6.3% lower.

Volume and value of domestic trips taken to South East (Jan to Jul)				
	2010	2009	% change 10/09	% change 10/08
No of trips	9.7 million	10.1 million	-4.2%	4.4%
No of nights	26.4 million	29.3 million	-10.0%	0.4%
Expenditure	£1.3 billion	£1.4 billion	-8.9%	-6.3%

Source: United Kingdom Tourism Survey

The latest results from the International Passenger Survey for the month of September are available at national level only and reveal a 3% drop in the number of overseas residents visiting the UK. The year to date figures show a 2% drop in trips and a 1% drop in visitor expenditure.

Occupancy

The region's hotel industry posted increases in all three key performance measurements during October 2010, according to data from STR. This follows month on month improvements throughout 2010 compared to 2009.

Average room occupancy was 3.7 per cent points higher this October compared to last year (up from 69.4% to 73.1%). Room yield is also continued to improve; achieved daily rate was up by 4.4% to £76.61 from £73.36 last October and revpar increased from £50.96 in October 2009 to £56.21 this year (up 10.3%).

Hotel performance (Oct)			
	2010	2009	% change 10/09
Room occupancy	73.1%	69.4%	3.7%
Achieved daily rate	£76.61	£73.36	4.4%
RevPAR	£56.21	£50.96	10.3%

Source: STR Global Regional Hotel Survey among sample of 320 hotels

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Visitor Attractions

Following a strong recovery in admission numbers during 2009 (on the back of the staycation trend) which saw many attractions bounce back to stronger position than in 2007, results from the England Attraction Monitor reveal that admission numbers have fallen back slightly in 2010.

At national level this decline stabilised in Q3, with visits increasing marginally by less than 0.5%. Growth was strongest in the North East and London. In the South East, however, footfall was down by 2% on average among the attractions taking part in the survey.

According to the Attraction Monitor, urban-based attractions led the way in Q3, showing an increase of 3% in admissions compared to last year. The environment has been more challenging for coastal attractions (down 3%) following a strong 2009.

Those investing in membership/season ticket schemes to attract local visitors appear to have benefited most from increases in admissions, with a quarter reporting increased visits from this segment.

Attractions are generally feeling cautious about the immediate future, with slightly fewer attractions more positive than less positive about the rest of the year. The larger urban attractions are most positive.

Continued uncertainty over the economy drives this caution, with the spectre of government spending cuts now appearing as a specific concern for many attractions.

Region	Qtr 1 change	Jan change	Feb change	Mar change
TOTAL ENGLAND (628)	-3%	-11%	-6%	6%
North East (52)	2%	-17%	10%	0%
North West (70)	-2%	-18%	<1%	10%
Yorkshire (53)	-4%	-31%	-15%	9%
East Midlands (57)	-2%	-12%	-10%	7%
West Midlands (57)	-7%	-7%	-11%	4%
East of England (64)	-2%	-15%	-23%	5%
London (40)	3%	-3%	4%	0%
South East (113)	-14%	-15%	-18%	4%
South West (122)	-18%	-19%	-3%	8%

Region	Qtr 2 change	Apr change	May change	Jun change
TOTAL ENGLAND (616)	-1%	-2%	-10%	11%
North East (44)	-6%	-10%	-18%	12%
North West (66)	6%	<1%	<1%	18%
Yorkshire (59)	-3%	-5%	-16%	13%
East Midlands (54)	-3%	-5%	-15%	16%
West Midlands (52)	-3%	-3%	-15%	12%
East of England (75)	-2%	<1%	-16%	10%
London (36)	1%	-2%	-1%	5%
South East (120)	-1%	<1%	-12%	10%
South West (110)	<1%	-1%	-10%	12%

Region	Qtr 3 change	Jul change	Aug change	Sept change
TOTAL ENGLAND (632)	<1%	3%	-1%	-1%
North East (50)	6%	-1%	12%	7%
North West (66)	<1%	1%	-2%	1%
Yorkshire (58)	-2%	-1%	-2%	-3%
East Midlands (52)	-4%	-2%	-6%	-2%
West Midlands (59)	-2%	9%	-2%	-1%
East of England (79)	<1%	<1%	-1%	3%
London (35)	4%	8%	6%	-3%
South East (123)	-2%	2%	-7%	<1%
South West (110)	1%	3%	-1%	<1%

Source: England Attraction Monitor

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News from around the region

Berkshire

More attractive shops and revamped public space will boost “brand Wokingham”, the local Chamber of Commerce has said after Wokingham Borough Council appointed a development partner to develop a new town centre.

Planned to be completed by 2016, proposals include doubling the floor space of Marks & Spencer, creating a new pedestrian area and building new shops. The town centre project is expected to generate 750 new jobs.

Buckinghamshire

The National Trust has spoken out against the Government's proposed route for a high speed rail link between London and Birmingham. The superfast rail link, known as High Speed 2, would see trains reach speeds of up to 250mph, reducing journey times between the UK's two biggest cities by more than half an hour.

The planned line cuts through the estate of one of the Trust's properties, Hartwell House in the Vale of Aylesbury - a celebrated 17th-century country house that was once home to the exiled King Louis XVIII of France. The Grade I-listed house, owned by the Ernest Cook Trust which leased it to The National Trust in 2007, is now a hotel set in 90 acres of gardens and parkland.

Hampshire & Isle of Wight

A new 'alliance' has been established by local authorities and museums along the south coast in a bid to improve services and secure government funding.

The Hampshire and Solent Museum Alliance will involve Hampshire County Council (HCC); Portsmouth City Council; Southampton City Council and Winchester City Council. The Isle of Wight Council, the Mary Rose Trust and the National Motor Museum in Beaulieu will also join the alliance following changes to the Renaissance scheme.

Kent

New restaurants and a cinema are at the heart of new regeneration plans which have been submitted to the local authority for Sittingbourne, Kent. Spenhill Regeneration has lodged the plans with Swale Borough Council for the scheme which will also include a hotel and leisure space.

The proposals have been shaped by a series of consultations over the last five years, which have found a demand for new restaurants and leisure facilities to revitalise the town. It is also estimated that the substantial investment will create over 500 jobs for local people.

Oxfordshire

Oxford City Council is to invest more than £700,000 to upgrade Oxford Ice Rink; improvements will include a new rink barrier and new rubber matting in addition to "high-level" maintenance to the ceiling area. OCC board member for leisure partnerships Bob Timbs said: "[Oxford Ice Rink] is a much-loved facility and we are pleased that this work is being carried out to ensure the smooth running of the rink for many years".

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Surrey

Hoteliers in Surrey are being invited to a series of multimedia workshops to protect hotels in the county against terrorism.

The events, run by Surrey Police, are part of a series being held across the region where local businesses are placed in the midst of a simulated terrorist attack. Other business sectors have already taken part in the Project Argus events but police say hotels are a particularly attractive and soft target for terrorists.

General/duty managers, chief engineers, restaurant managers and housekeeping managers are being taught how to minimise the risk of an attack and how to keep customers and premises safe. Bob Stephens, Head of Counter Terrorism for Surrey Police, said: "Hotels are crowded places, often with little or no security measures. They attract large numbers of people, often in confined areas. The managers must be prepared".

Sussex

Lewes District Council and Newhaven Town Council have agreed to support leisure trust Wave Leisure's bid to turn Shakespeare Hall in Newhaven into a "viable business". The venue has suffered from a fall in customer numbers in recent years. The proposed bid will involve providing sports and activities at the venue. As part of the agreement, the three partners will invest a total of £150,000 towards immediate maintenance costs of the hall and a further £30,000 has been set aside to cover revenue deficit costs.

Contact us

If you have any queries regarding the *Intelligence Update*, or require any additional Market Intelligence, please contact Parves Khan (Head of Research) by [email](#) or phone (02380 625459).

To view all the latest market intelligence visit www.tourismsoutheast.com/marketintelligence

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