



# INTELLIGENCE UPDATE

Research & Intelligence - Keeping you in the picture

TOURISM  
SOUTH EAST

NOVEMBER 2010 EDITION

## Latest facts & figures

### Number of overseas visitors down over first half

The Office of National Statistics has just released the latest figures from the International Passenger Survey (IPS) for the South East. The figures which cover the first six months of the year, reveal a 4% drop in the number of overseas visitors staying overnight in the region compared to the same period last year. The historical data reveals year-on-year increases in visitor numbers until 2009 when we see a 8% drop in volume compared to 2008, following the start of a global recession. At national level, 4% fewer foreign visitors came to the UK in 2010 when compared to the corresponding period a year earlier.

Trends in overall spending levels have been less consistent and strongly influenced by the vagaries of international exchange rates. The data shows a 17% reduction in total spend for the period Jan-Jun 2010 compared to same period in 2009. At national level, spending in the year-to-date was 1% lower in nominal terms than during the corresponding period a year earlier.

**Table 1: Jan-Jun number of inbound visitor by year**

Year	Total Visits (000)	Year-on-year % difference
2010	1,913	-4%
2009	1,998	-8%
2008	2,162	+11%
2007	1,948	+3%
2006	1,897	+4%
2005	1,828	+4%
2004	1,756	+14%
2003	1,541	

Source: International Passenger Survey, VisitBritain

**Table 2: Jan-Jun inbound trip expenditure by year**

Year	Total Spend (£m)	Year-on-year % difference
2010	660	-17%
2009	795	+2%
2008	781	+24%
2007	631	-4%
2006	656	+15%
2005	568	+5%
2004	540	+3%
2003	524	

Source: International Passenger Survey, VisitBritain

The most recent national level data from IPS is for August 2010 and reveals that the number of overseas residents visiting the UK was 1% higher compared with August 2009. However, looking at the year-to-date, 2% fewer visitors came to the UK when compared to the corresponding period a year earlier. Spending in the year-to-date was no different in nominal terms compared to the corresponding period a year earlier.

[To view the latest domestic and inbound visitors figures click here](#)

### Hotels show strong September

Despite the gloomy economic prediction's following October's spending review, hoteliers across the region had an upbeat September according to STR Global. Room rates, occupancy and yield were all up.

Results from a sample of 330 hotels across the region reveal average room occupancy was up from 72.8% last September to 78.5% this September, while room rate increased from £76.20 to £80.80 this year. Room yield (revpar) increased by 14% to £63.52 from £55.60

[To view the latest occupancy figures click here](#)

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## Latest research reports

### Ignoring disabled customers could cost industry billions

The UK hospitality and tourism industry could be losing billions by failing to recognise the potential of the disabled market, as well as missing out on opportunities presented by the 2012 Paralympic Games, according to a report from the Department for Business, Innovation and Skills (BIS) and Office for Disability Issues.

The '2012 Legacy for Disabled People: Inclusive and Accessible Business report found that:

- Disabled consumers are a sizeable but poorly addressed segment of the consumer market worth £80 billion per year
- For an average business, disabled customers may account for up to 20 percent of the customer base
- 66% of consumers choose businesses where they have received good service
- 58% of disabled consumers state that how a business treats them affects the buying decisions of their family and friends
- 83% of disabled consumers have had to take their custom elsewhere, to a more accessible competitor

It also found that businesses with a better focus on disabled customers have seen a rapidly expanding customer base, increases in sales and profitability, have gained a substantial 'foothold' in their market and obtained a distinct advantage over their competitors.

The findings indicated that many small- and medium-sized businesses (SMEs) are failing to recognise the potential of the disabled market due to little understanding of the diverse customer base, the fear of 'getting it wrong' and a lack of material available which focuses on disabled people as customers and is specifically aimed at SMEs .

[To view the report click here](#)

### New research into opportunities for industry expansion

The British Hospitality Association's new report 'Creating Jobs in Britain--A Hospitality Economy Proposition', presents a proposition to government for an active and positive partnership to position hospitality firmly as a key driver of economic recovery and sustainable growth. The main points of the proposal are:

- Improved government relations with the hospitality industry
- long-term future for tourist boards and more cohesion between the boards across the UK
- The inauguration of a joint government/BHA study on the impact of VAT (other EU countries have a reduced rate compared to the UK's 20% on hotels and attractions)
- Seeking to minimise the regulatory burden on the sector
- Easing existing visitor visa application procedure
- Investment in new hotel products and facilities within real estate investment trust framework (more tax breaks)
- Training border staff (ensure they have 'the visitor experience' as part of skills set)
- Creating a Hospitality Service Academy to tackle long-term unemployment
- Making sustainability one of the key priorities
- A greater balance of comparison between private and public sector bids for outsourcing of food service and general facilities management.

[To view the report click here](#)

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## News from around the region

### Berkshire

Luxury hotel operator Dorchester Collection has opened a new country house hotel and eco-luxury spa, Coworth Park, near Ascot. Set in 240 acres of Berkshire parkland, the 70-bedroom Coworth Park hotel is a restored Georgian Manor House and has a host of eco-friendly operating procedures. These include a biomass boiler within an underground energy centre which is fuelled by burning willow grown on the estate and a cooling system provided via a ground source water circulation system of underground pipes known as 'slinkys' that are located within the hotel grounds.

### Buckinghamshire

Stoke Mandeville Stadium, the birthplace of the Paralympics Games, hosted the International Paralympic Committee's (IPC) Shooting World Cup in October, the first time the event has been held in Britain. The aim of the event was to create awareness of disabled sport and promote real talent and opportunities for disabled people. There were around 75 shooters taking part in this competition from 15 nations around the globe including Thailand, USA, Poland and Great Britain.

### Hampshire

Work is underway on the £16.3m construction phase of the new £35m Mary Rose Museum at Portsmouth Historic Dockyard. Due for completion in autumn 2012, the scheme will see a boat-shaped building constructed over the dry dock that contains the Mary Rose - Henry VIII's flagship. When the new museum opens, more than 19,000 artefacts raised from the bottom of the Solent will be put on show in galleries located on the same level as the ship's main deck.

The start of the scheme's construction phase also coincides with the 28th anniversary of the raising of the Mary Rose from the bottom of the Solent, where it sank in 1545.

### Isle of Wight

Cross-Solent ferry operator Wightlink has confirmed it has secured funding of £3.5m to safeguard the future of Ryde pier. The money the firm has raised so far will be used for the first part of work, which will allow the pier to re-open to both pedestrians and vehicles. The final schedule of works is still to be confirmed, but the company says it is hoping to complete them during March 2011, subject to Heritage approval, weather conditions and availability of sustainable FSC-approved (Forest Stewardship Council) material.

### Kent

All outstanding objections to plans to establish a new arts venue as part of a 'shared sacred space' at St Mary's Church in Ashford have been dismissed. Under plans for the Arts at St Mary's project, work will be carried out to enhance the church's existing role as a place of worship, as well as creating an arts venue able to cater for 350 people.

The £1.7m scheme has received £1.2m Growth Area Funding from Ashford's Future and £100,000 from Ashford Borough Council. The Church of England has also contributed.

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### Oxfordshire

West Oxfordshire District Council's tourism service has commissioned a new DVD extolling the virtues of visiting West Oxfordshire. The film, called *The Oxfordshire Cotswolds*, is aimed at enticing more visitors to come and visit the area. As well as being made available to view on YouTube, copies of the DVD have been sent to the national and regional tourist boards to promote West Oxfordshire as a tourist destination.

The district is already popular with tourists, attracting around 3.7 million visitors every year. Tourism is worth an estimated £232m to the local economy, supporting the equivalent of nearly 4,000 full-time jobs.

### Surrey

Guildford Borough Council has appointed HQ Theatres to operate the Surrey town's new entertainment venue, which is set to open in autumn 2011. When complete, the entertainment venue will replace Guildford's former Civic Hall and will feature an auditorium with a capacity of 1,000 seated or 1,700 standing. A multi-purpose studio; two conference and five seminar rooms; a café; bars; and foyer spaces will complete the venue's line-up of facilities.

### Sussex

Rother District Council has announced that work is due to commence on the next stage of a £3.5m scheme to transform the seafront in Bexhill, East Sussex. Kent-based Neilcott Construction will start construction work on the Next Wave scheme along the town's promenade. Plans include the renovation of the Grade II-listed King George V Colonnade, the creation of a new boathouse for Bexhill Rowing Club and the refurbishment of the Metropole Lawns.

Work on the first phase has included landscaping and resurfacing the West Promenade, with the entire scheme due for completion in summer 2011.

## 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](http://www.tourismsoutheast.com/marketintelligence)

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