



## Latest facts & figures

### Domestic tourism trends

Between January and November 2010, the volume and value of overnight domestic trips taken in England fell by 5% when compared to the first eleven months of 2009.

In the first eleven months of 2010, the number of overnight domestic trips taken in England declined across all trip purposes. Business trips were down by 4% and spending by 8%. The number of 'pure holiday' overnight trips dropped by 6% and their value dropped by 4%. The Visiting Friends and Relatives (VFR) market was more resilient, dropping by only 1% overall.

In the South East, overnight domestic trip volume dropped by 9% and spend by 14% when compared to the same period in 2009.

As reiterated in the *March Intelligence Update*, the results need to be put in the context of plummeting levels of consumer confidence, increased concerns over job security, and how quickly the economy will recover. These concerns damaged consumer spending levels in 2010 and are likely to be heightened in 2011 with the spectre of major public sector cuts and job losses.

**Table 1: Overnight domestic trips (Jan-Nov)**

	2010	2009	% change
Trips - South East	15,208,000	16,765,000	-9%
Trips - England	89,500,000	93,800,000	-5%
Spend - South East	£2,093,000,000	£2,431,000,000	-14%
Spend - England	£15,211,000,000	£16,051,000,000	-5%

Source: UKTS

### Overseas tourism trends

Travel abroad by British residents declined in 2009 and continued to do so in 2010. Overall 6% fewer trips abroad were taken by British nationals between January to November 2010 compared to the same period in 2009 according to the International Passenger Survey (IPS).

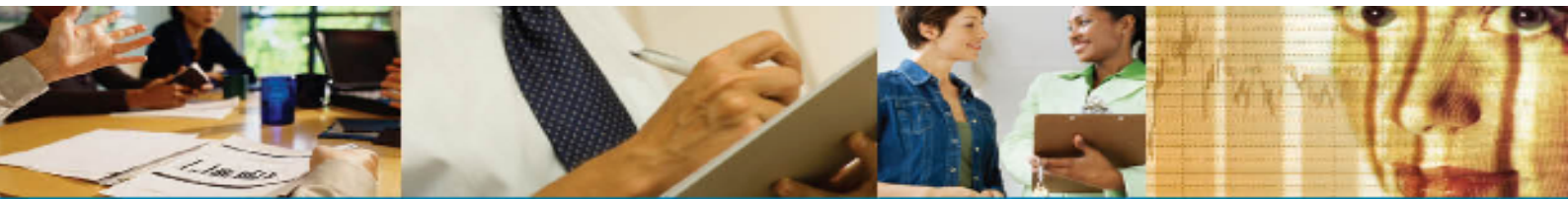
The number of foreign nationals visiting the UK also dropped in 2010 compared to 2009. The headlines for 2010 (full year) were as follows:

- The UK had 29.6 million visits from overseas in 2010 (a fall of 0.3 million, down 1% on 2009).
- Visitors spent £16.7 billion in the UK in 2010 (vs. £16.6 billion in 2009, 0% change in nominal terms)
- Visits for Holiday grew by 1%, following on from the 5% growth shown in 2009
- Visits to see Friends and Relatives declined by 5% in 2010, following a 10% fall in 2009
- Business travel has shown moderate growth on 2009 (3% increase).

The latest results from IPS are for January this year and reveal that the number of overseas residents visiting the UK was 2% lower compared with January 2010. In the three months to January 2011 there were 2% fewer visits to the UK by overseas residents than in the equivalent three months a year before.

There was no change, in nominal terms, in the amount that overseas visitors spent in the UK during the three months to January 2011 compared with the same period a year before.

Regional full year results are not yet available.



# INTELLIGENCE UPDATE

Research & Intelligence - Keeping you in the picture

TOURISM  
SOUTH EAST

## Hotel performance trends

Average room occupancy in February this year was down by 1.2 per cent points compared to the same month last year. Room yield measured by ADR (Average Daily Rate) and revPAR (Revenue per Available Room) on the other hand were 9% and 8% higher respectively in February this year compared to last year.

Table 2: Current Month – Feb 2011 vs Feb 2010

	2011	2010	% change
Room occ.	63.0%	64.2%	-1.2% points
ADR	£77.09	£70.59	9%
RevPAR	£48.89	£45.28	8%

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

## Latest tourism research

According to the TRI Hospitality Consulting 'Budget Hotels 2011' report the number of branded budget hotels in the UK increased by 54 during 2010, with 5,446 new rooms coming on stream.

For more information go to:

<http://www.trihospitality.com>

New research by the National Trust has revealed more people are now opting for 'daycations' rather than a two-week holiday. The National Trust study shows a new trend for British residents in taking multiple single day holidays throughout the year, as opposed to the traditional two-week break; with half of all British residents not planning on taking a fortnights holiday at all this year. The daycation is strongly believed to be a cheaper alternative to the traditional holiday, with 46% of respondents citing the cost of a fortnight's holiday as the main reason for not taking two weeks off work.

For more information go to:

<http://www.nationaltrust.org.uk/main/w-vh/w-visits/w-visits-daycations.htm>

Just over half (53%) of UK consumer's research and buy holidays online, though many could be deterred by unclear pricing, according to a recent survey commissioned by Econsultancy. The survey of 2,004 UK consumers found that 29% of respondents do not find travel websites easy to use, and that unclear pricing is the most likely reason for abandoning purchases online. Around 15% said that holiday research and purchase all takes place offline, while 14% research offline before booking online. To put it another way, the internet is involved in almost 85% of holiday purchases.

For more information go to:

<http://econsultancy.com/uk/blog/7134-what-do-customers-want-from-travel-websites>

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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