



## Latest facts & figures

### Domestic tourism volume and value

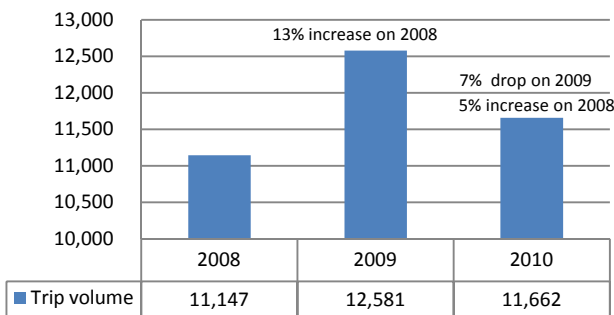
Between January and August, the volume of overnight trips taken in the UK was 4% lower than in the first eight months of 2009, with 7% fewer bednights and a 7% decrease in spend.

Regional results for this period show a 7% reduction in the volume of domestic overnight trips to the South East compared to last year. Trips also shortened in length leading to a 10% fall in bednights. Trip expenditure dropped by 11% compared to 2009.

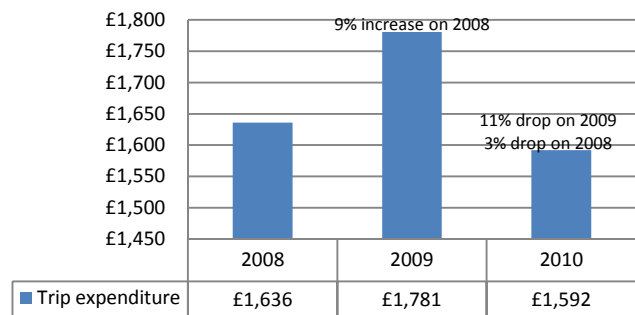
However, the results need to be reviewed in the context of a boom in domestic tourism in 2009. 2009 was an exceptional year for domestic tourism, so it is more helpful to compare 2010 volume and value figures with that of 2008. Compared to the same eight months in 2008, the overall volume of trips in 2010 was 5% higher with overall trip spend only 3% lower.

The point is best illustrated with results for 'pure holiday trips'. In 2009 holiday-motivated domestic trips to the South East increased by a staggering 36% compared to 2008, indicative of the staycation phenomenon sweeping across the UK. This high volume level has been difficult to sustain in 2010, not least because of the continuing pressures on household income, but trip volume is still 13% higher than it was in 2008 and pure holiday spend is 2% higher than it was in 2008.

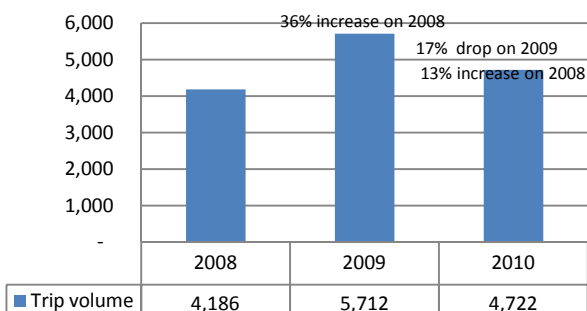
**Domestic trips volume (all trips) in thousands  
Jan to August period**



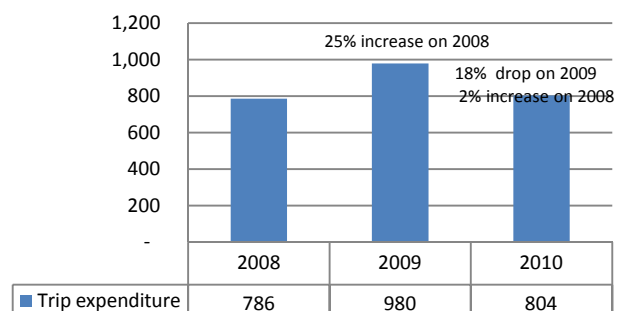
**Domestic trips expenditure (all trips) in millions  
Jan to August period**



**Domestic trips volume (pure holiday trips) in thousands  
Jan to August period**



**Domestic trip expenditure (pure holiday trips) in millions  
Jan to August period**



## Latest facts & figures

### Overseas tourism volume and value

The latest published figures from the International Passenger Survey on the volume and value of trips made by foreign nationals are at the UK level only. Regional results will be available for reporting in the February Intelligence Update.

According to the Survey in October 2010, the number of overseas residents visiting the UK was 8% higher compared with October 2009. Looking at the year-to-date, 1% 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.

Looking ahead to this year, VisitBritain forecast modest growth in the volume of overseas trips to the UK. The forecast is that the volume of inbound tourism into the UK in 2011 will be 30.0 million visits, with inbound visitors spending £17.2bn; an increase of 1% in trip volume and an increase of 2% (before inflation) in visitor spend.

### Occupancy

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

Average room occupancy in November was 5% higher than last year (up from 63% to 68%). Room yield also continued to improve; achieved daily rate was up by 10% to £80.10 from £72.60 last November and RevPAR increased from £45.90 in November 2009 to £54.20 this year (up 18%).

Year-to-date figures show a 8% point increase in average room occupancy compared to the same period last year, an increase in ADR of 4% and an increase in RevPAR of 11%.

Hotel performance – November			
	Nov-09	Nov-10	% change
Room occupancy	63%	68%	5%
Achieved Room Rate	£72.60	£80.10	10%
RevPAR	£45.90	£54.20	18%

Hotel performance – year to date			
	Jan-Nov 09	Jan-Nov 10	% change
Room occupancy	66%	74%	8%
Achieved Room Rate	£74.00	£77.20	4%
RevPAR	£48.90	£54.40	11%

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



## News from around the region

### Berkshire

Newbury Racecourse and Bespoke Hotels have agreed terms for a 10-year hotel management contract at the Berkshire venue. The racecourse operator will own the 120-bedroom property to be built as part of a multi-million pound redevelopment of the venue. It is due to open in 2014. Under the plans, the hotel will be called The Newbury and will include 3,800sq m (40,903sq ft) of event and exhibition space.

### Buckinghamshire

Land next to the new Waterside Theatre in Aylesbury is to benefit from a new £18m mixed-use development. An 80-bedroom Travelodge and a Waitrose supermarket form part of the proposals which have received the go-ahead from Aylesbury Vale District Council. The development is scheduled for completion in 2012.

### Hampshire

Portsmouth City Council has launched a new public consultation in order to gather views on a draft strategy for the regeneration of the city. *Shaping the Future of Portsmouth* has been drawn up over the past 12 months with the assistance of a previous consultation with businesses and residents. Members of the public had the opportunity to comment on the document which aims to guide the future redevelopment of the city centre.

### Isle of Wight

Isle of Wight Council is to seek a new operator for Ventnor Winter Gardens after the current operator revealed it can no longer run the attraction. Ventnor Town Council has informed the Council that it wishes to end the existing arrangement, which will see the Winter Gardens shut on 31 January.

### Kent

Margate's Turner Contemporary, a new £17.4m gallery dedicated to artist JMW Turner, has been officially handed over by Kent County Council to its trustees. Construction work is now complete at the David Chipperfield-designed attraction, which has been transferred over to the trust that will operate the venue. The handover comes after it was confirmed that Turner Contemporary will open its doors on 16 April 2011.

### Oxfordshire

Work is to start on a £5m redevelopment of the Ashmolean Museum's Egyptian galleries after the plans were approved by Oxford City Council. The project - backed by Lord Sainsbury's Linbury Trust - will also include the creation of a fifth gallery in a space currently occupied by the museum's shop. Plans will see the rooms linked by new doorways to allow the Ashmolean's collection to be exhibited under a number of broad themes. The galleries will be closed from 1 January 2011 to allow work to be carried out, with the new facilities due to open in winter 2011.



# INTELLIGENCE UPDATE

Research & Intelligence - Keeping you in the picture

TOURISM  
SOUTH EAST

JANUARY 2011 EDITION

## Surrey

An arts venue in Walton-on-Thames is in line for a refurbishment after the local authority backed the proposals. Elmbridge Borough Council (EBC) has agreed in principle to carry out work to transform the venue in order to increase its life span by 10-15 years. The council's cabinet requested that a further report, including detailed price specifications, be submitted for consideration in January. Initial plans include a new roof, an improved bar area and upgraded dressing rooms.

## Sussex

Plans for The Keep, a new £19m historical resource centre for East Sussex, have been given the green light by Brighton and Hove City Council. The facility is to be built at Woollards Field near Falmer as part of a scheme led by Brighton and Hove City Council, East Sussex County Council, and the University of Sussex. Work is due to start on site this summer and it is anticipated The Keep will open its doors in 2013, housing more than 900 years-worth of historical material.

## 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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