



INTELLIGENCE UPDATE

Research & Intelligence - Keeping you in the picture

TOURISM
SOUTH EAST

May Edition 2011

Latest facts & figures

Overnight trip volume and value in 2010

The South East holds onto its position as the second largest regional economy in England for both domestic tourism (after South West) and overseas tourism (after London).

The latest annual figures for overnight tourism for England and the Regions reveals that the South East welcomed around 16.3 million domestic visitors and just over 4 million overseas visitors who spent one or more nights in the region. Tourism overnight trips generated approximately £3.9 billion through visitor expenditure.

The lead role the region plays in generating tourism revenue should not belie the fact that the tourism market has been hit hard by the downturn in the economy in the UK and across the globe. All regions in England saw a drop in the number of trips taken. In the South East domestic trips fell by 10.3% and overseas trips fell by 3.5% compared to 2009.

A full analysis of national and regional trends will be presented in the June edition of Intelligence Update.

Table 1: Domestic tourism in England and Regions 2010						
	Staying Visits		Nights		Spend	
	m	% share	m	% share	£m	% share
Total England	96.3		288.1		£16,210	
South West	19.2	20%	73.8	26%	£3,606	22%
South East	16.3	17%	46.0	16%	£2,232	14%
North West	12.5	13%	34.3	12%	£2,260	14%
London	11.6	12%	24.8	9%	£2,515	16%
Yorks & Humb	10.0	10%	26.2	9%	£1,478	9%
East	8.9	9%	27.9	10%	£1,306	8%
West Midlands	7.9	8%	20.9	7%	£1,078	7%
East Midlands	7.7	8%	21.5	7%	£1,029	6%
North East	3.6	4%	10.8	4%	£627	4%

Table 2: Overseas tourism in England and Regions 2010						
	Staying Visits		Nights		Spend	
	000	% share	m	% share	£m	% share
Total England	25,490		195.6		£14,503	
London	14,600	57%	89.5	46%	£8,669	60%
South East	4,160	16%	28.9	15%	£1,703	12%
North West	2,150	8%	14.7	8%	£1,012	7%
South West	2,130	8%	16.2	8%	£902	6%
East	1,980	8%	15.7	8%	£731	5%
West Midlands	1,550	6%	10.6	5%	£545	4%
Yorks & Humb	1,040	4%	8.1	4%	£413	3%

the Beautiful South



INTELLIGENCE UPDATE

Research & Intelligence - Keeping you in the picture

TOURISM
SOUTH EAST

Hotel performance trends

Average room occupancy in March this year was up by 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) was 6% and 10% higher respectively in March this year compared to last year.

Results for the first quarter of the year (Jan to Mar) reveal a 1% point increase in occupancy, a 6% increase in ADR and a 8% increase in RevPAR.

South East Hotel Performance – January to March						
	Occ %		ADR		RevPAR	
	2011	2010	2011	2010	2011	2010
Current month	68%	66%	£80.41	£75.10	£54.47	£49.33
Year to date	61%	60%	£75.64	£70.84	£46.05	£42.60

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

Latest tourism research

The VisitEngland Research & Insights team have now published wave 14 of the Domestic Industry Panel research. VisitEngland conducts qualitative interviews with senior representatives from the tourism industry three times a year and wave 14 of this research took place in March. Wave 14 focused on past performance and expectations for the future, wider issues affecting tourism in England and panellists' expectations about the impact of both royal wedding and the Olympics.

The report is available to download [here](#).

VisitEngland has also published the latest results from its research into the 'staycation' market. VisitEngland started conducting research into the 'staycation' in 2010 and this is the successor to the 'credit crunch' research it began in late 2008.

The report is available to download [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 or phone (02380 625459).

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

the Beautiful South

www.tourismsoutheast.com

www.tourismsoutheast.com/marketintelligence