



INTELLIGENCE UPDATE

Research & Intelligence - Keeping you in the picture

TOURISM
SOUTH EAST

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Latest facts & figures

International visitors to the South East

The latest detailed quarterly data released by the ONS for international trips (from the International Passenger Survey) to the South East show that the region received approximately 775,000 visitors from overseas over January to March. Total expenditure generated by these trips amounted to approximately £263 million.

Year-on-year trend analysis reveals a decline in volume and value following the start of a global economic recession in 2009.

Table 1: International trips to the South East January to March, Year-on-Year (Numbers)

	2006	2007	2008	2009	2010
Total Visits (000)	754	836	954	802	775
Total Nights (000)	6,361	6,323	6,960	6,538	5,238
Total Spend (£m)	258	291	305	338	263

Table 2: International trips to the South East, January to March, Year-on-Year (% Change)

	2006	2007	2008	2009	2010
Total Visits	0.85%	10.93%	14.01%	-15.87%	-3.45%
Total Nights	21.88%	-0.59%	10.07%	-6.06%	-19.88%
Total Spend	6.81%	12.97%	4.76%	10.83%	-22.15%

Occupancy performance

Serviced accommodation

Hotels across the region saw a 5.3% increase in average room occupancy, an increase of 3.4% in Achieved Daily Rate and a 11.3% increase in RevPAR.

Table 3: South East hotel performance

	2010	2009	% difference
Occupancy	76.5%	71.2%	5.3%
ADR	£84.60	£81.80	3.4%
RevPAR	£64.80	£58.20	11.3%

Source: STR Global hotel survey based on sample of 320 hotels across region

Results for June from the England Occupancy Survey for the South East show that average room occupancy among B&B accommodation providers was 54.7% (up 9.4% compared to last June), and average bed occupancy was 42.3% (up 6.7% compared to last June).

The above results are positive signs that the industry is experiencing recovery in 2010 following a difficult 2009.

Camping & caravanning

2009 was a boom year for camping and caravanning breaks; the latest advance booking figures show that volume levels are being sustained this year. Figures released by the Camping & Caravanning Club reveal that advance bookings are up year-on-year for both August (+2%) and September (+1%).

the Beautiful South