


Thank you to Explore Kent for their images of Kent in Spring

Visit Kent's Business Barometer
April 2009

Welcome to the Business Barometer for April produced by Visit Kent's research team.
In the extraordinary current economic climate, we continue to try to reflect accurately the underlying trends in average overall figures. Many of our attractions were now back open during April, and the Easter festivities were held in April this year. With the addition of a good level of sunshine during April, we have been anticipating and are pleased to report a positive set of results.

Kent Headlines – Comparison April 2008/2009

Kent Attraction Visitor Numbers overall	**- Up 37%**
Kent Serviced Accommodation Occupancy	**- Up 3%**
Kent Self Catering Unit Occupancy	**- Down 8%**
TIC Visitor Numbers	**- Up 2%**
Cross Channel Passengers	**- Up 6%**

- Visitor Attractions in Kent have experienced an excellent month with the majority experiencing at least a 10% rise or more.
- French day trippers are taking advantage of good Euro rates and accessibility of Kent.
- Tourist Information Centres have experienced a strong rise in near European visitors making enquiries, and a rise in coach numbers.
- Cross channel carriers experienced the Easter boost in crossing numbers.
- Self catering accommodation experienced a 9% rise in overseas visitors, but a fall in occupancy of 8% compared to April last year. This fall would have been greater if Easter had not fallen during April.
- Serviced accommodation in Kent is faring less well than national accommodation, potentially due to our proximity as a day visit destination.

"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)

Weather April 2009 (Source www.bbc.co.uk)

The weather is cited as a concern for all businesses in all our surveys, and so is included in each of our monthly Business Barometers. April was a glorious month, according to the BBC, there was plenty of fine, settled and warm weather, especially in the first and third weeks of April. Easter was in the first week of April and so benefited from this. Overall, April was warmer, drier and sunnier than average and provisionally it equals the third warmest April in a series from 1914, but was not as warm as April 2007.

England Mean Temperature Series	2.2 degrees above average
England Rainfall Series	74% of average
England Sunshine Series	124% of average

Attractions

April was an excellent month overall for our reporting attractions, as the Easter holidays and sunny weather combined to make visitors come out and explore Kent in large numbers. A 37% increase was even higher than expected even taking into consideration these factors, and from a good sample of 35 attractions.

Kent Visitor numbers to attractions

Visitor numbers	April 2008	April 2009	% Change
	285,411	390,732	Up 37%

Range of performance amongst attractions overall

In April, 27 attractions reported a rise in visitor numbers ranging from 1% to 140% with a pleasing 19 of these attractions reporting a rise of 25% or more. Of the 35 attractions reporting, only 6 attractions experienced a fall in visitor numbers ranging from 62% down, to 5% down. 2 attractions had unusual circumstances and so were unable to report two years of comparable figures.

Performance according to attraction type

Both gardens and historic buildings/heritage attractions did very well in April, up 50% compared with last year. Many of these are in rural areas and these types of attractions tend to do well in good weather. A few contributed their increases to particularly successful events and marketing. Indoor attractions such as the museums fared less well this month and were the only group overall to experience a fall in visitors year on year.

Gardens	Historic Building Heritage Attraction	Museum	Tour/Transport attraction	Zoo/ Animal Attraction	Outdoor Activity water sports	Other
Up 50%	Up 50%	Down 8%	No change	Up 29%	Up 28%	Up 16%

"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)

Performance according to attraction location

All locations did well in April, but rural attractions in particular experienced excellent visitor numbers during the month up 44% on last year. Urban (non museum) attractions also were 24% up overall. The coastal attractions sample was quite small, but indicated that the weather was not quite warm enough yet for these types of attractions to benefit as much as the others.

Coastal	Rural	Urban
Up 4%	Up 44%	Up 24%

Performance according to attraction cost

Visitors were prepared to pay for their attractions during April, probably as part of the Easter holidays, and so charging attractions did better than the free attractions. However, the sample for free attractions was small this month, and so this fall only represents a couple of attractions.

Charging	Free
38% up	15% down

Issues having a positive effect on business in April ('sic')

Easter has been strong this April - looks like visitors are returning, strong groups market especially big growth in Belgian groups. Good Weather
Easter in April and it didn't snow...weather warm and school holidays included Easter.
EASTER IN APRIL- WEATHER- EXCHANGE RATE- GROUP MARKET
Easter, very good weather, Easter Activities
Excellent Easter event. Fairly good weather.
Fair weather. Low £ cost
good weather during our biggest festival, Easter fell in April this year
Good weather for most of the Easter Holidays.
Good Weather, Easter in April,
Good weather, good bluebells, Easter and revised opening times
Good weather. Good value in a recession
Good weather. More volunteers
Increase in overseas visitors
Tourism at home
Trade fairs in 2008 were very good and this has helped group business with forward bookings. Better weather than last year
Weather for gardens

"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)

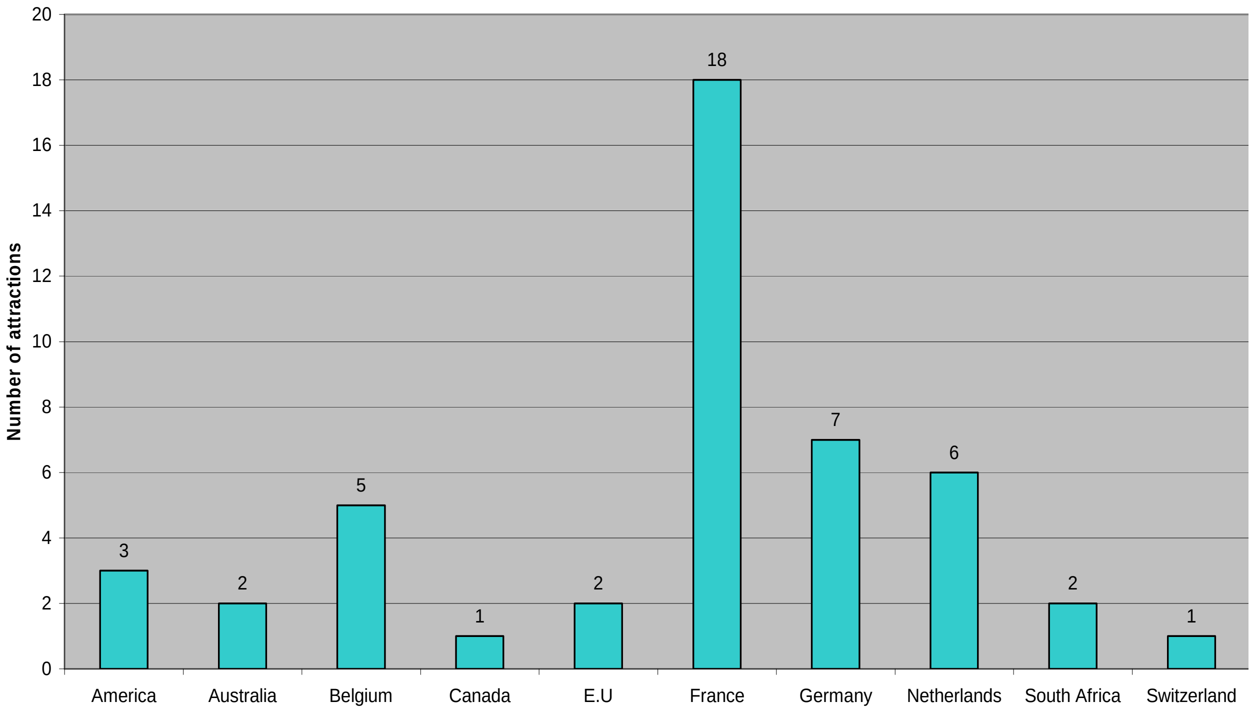
Issues having a negative effect on business in April ('sic')

Credit crunch - secondary spend is still down.
Economic climate
general downturn in economy
Good weather does not help this attraction however that fact that it is free should have shown a growth in a recession. Lack of exhibitions on site.
Growth in visitors not reflected in spend
half term in may and not April this year
Lack of advertising and the weather.
Late Easter opening
Less spend in shops
Not many bookings for weddings or private events - effect of recession?
Uncertainty about economy
Visitors holding off awaiting new extension to open
Weather is also a crucial factor

Overseas visitors to attractions in April

Visitors from France were still our highest group of visitors according to the attractions that record their overseas visitors. Two attractions specified EU rather than a particular country, and so the origin of these visitors is less clear.

Top two origin countries of visitors to Kent



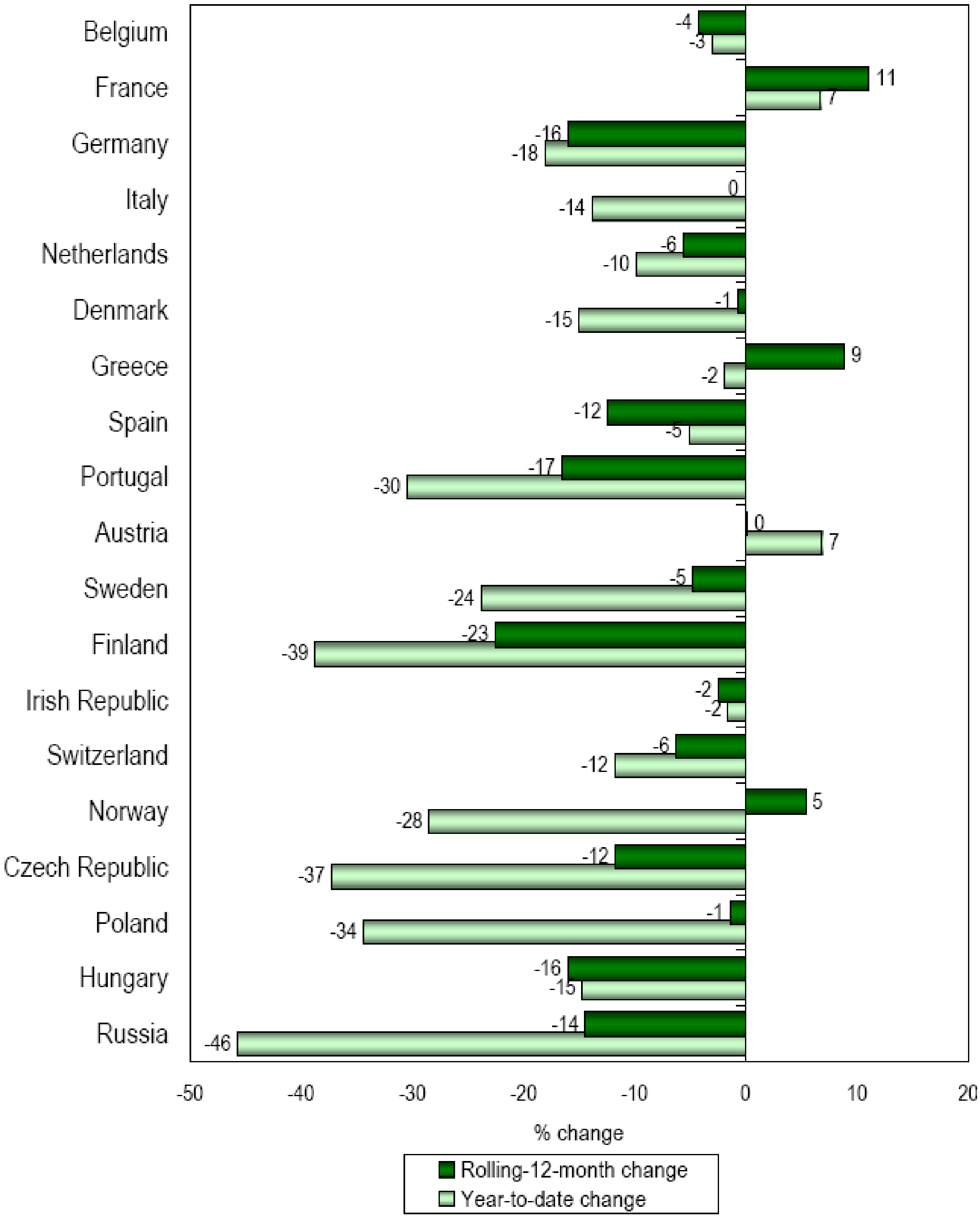
National Data on attractions (Source International Passenger Survey)

VisitBritain provide regular information on the incoming visitors to the UK through the International Passenger survey available on www.tourismtrade.org.uk . As can be seen

"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)

from the first chart, the French and Austrian visitors are both up in 2009 by 7%, but other European visitors across the UK are down compared to last year.

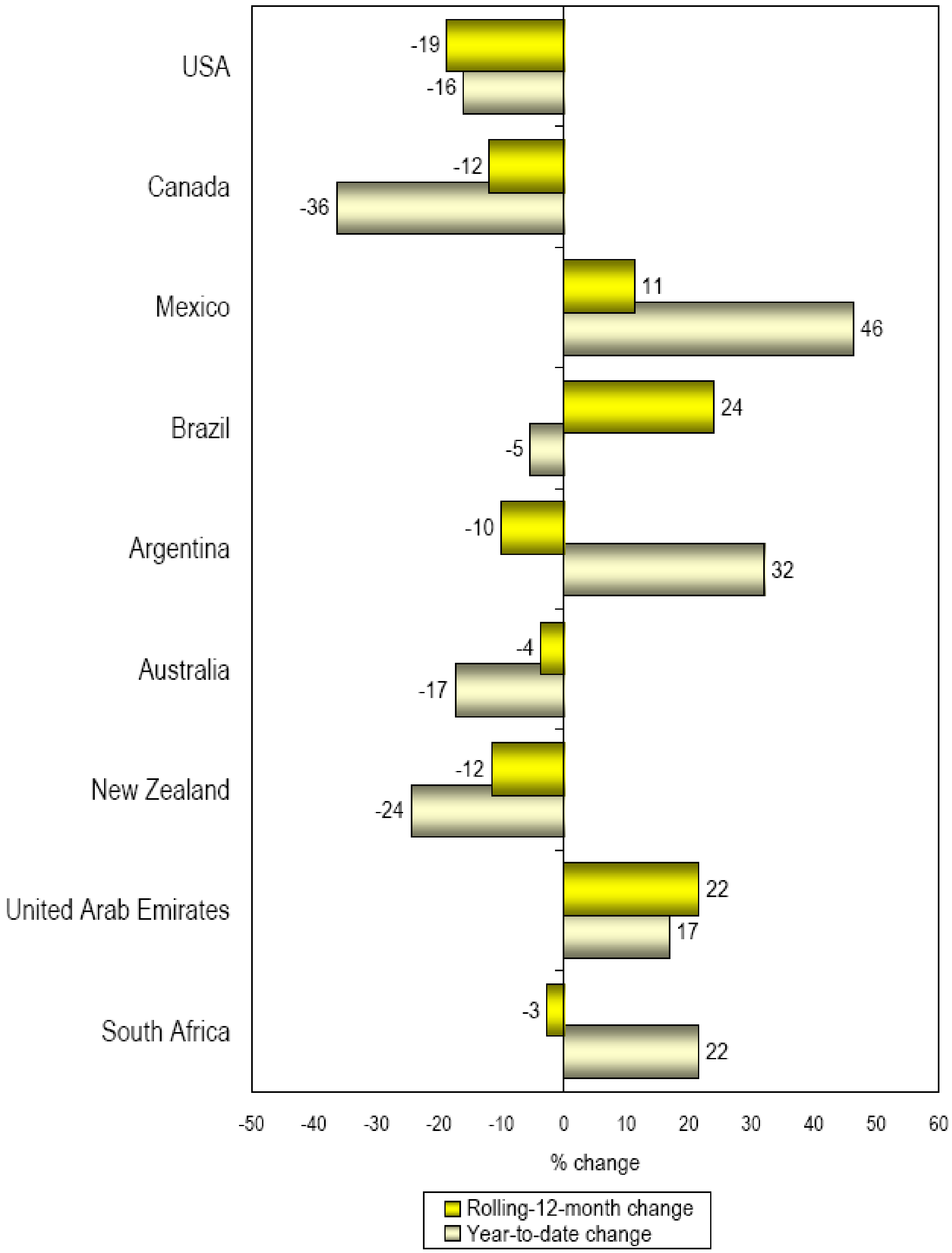
Inbound Visits to the UK
March 2009: Year-to-date and Rolling-12-month change vs. same period of previous year
(Provisional Estimates)



Inbound Visits to the UK

March 2009: Year-to-date and Rolling-12-month change vs. same period of previous year

(Provisional Estimates)



"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)

The following tables give an indication of the national tourism picture for 2008 and show a high level of growth in visitors from Poland and Spain. There is also good growth in the level of Irish, French and Italian visitors to the UK, but a decline in US and Japanese visitors. However, the US market still provides a high level of spend to the UK; with 13.6% of the total spend, more than twice the income from Germany or France.

Top Ten Markets by Volume (2008P)

	Visits (000s)	% total
France	3,636	11.4%
Irish Republic	3,069	9.6%
USA	2,959	9.3%
Germany	2,905	9.1%
Spain	1,977	6.2%
Netherlands	1,811	5.7%
Italy	1,645	5.2%
Poland	1,493	4.7%
Belgium	969	3.0%
Australia	959	3.0%

Top Ten Markets by Value (2008P)

	Spend (£m)	% total
USA	2,228	13.6%
Germany	1,130	6.9%
France	1,054	6.4%
Irish Republic	965	5.9%
Spain	816	5.0%
Italy	811	5.0%
Australia	773	4.7%
Netherlands	698	4.3%
Canada	526	3.2%
Poland	519	3.2%

Fastest growing markets by value (2000-08P)

	Growth £m		%
Poland	459	Poland	763%
Spain	407	Czech Republ	202%
Irish Republic	395	Hungary	130%
France	370	Norway	116%
Italy	339	India	111%

Fastest declining markets by value (2000-08P)

	Decline £m		%
USA	-524	Japan	-64%
Japan	-291	Argentina	-59%
Israel	-46	Venezuela	-51%
Mexico	-39	Mexico	-49%
Argentina	-34	Colombia	-39%

"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)

Accommodation

Kent self catering occupancy data

Self catering accommodation has not had such a good month in April with a net unit occupancy fall of 7.6% compared to last year. However, average party size is up slightly, and the number of overseas residents is up 9.4%.

Self-Catering occupancy comparison data April 2008/9

	Average Stay	Net unit occupancy	Average Party size	% UK residents	% Overseas residents
Average April 2008	7.3	67.4	2.3	68.6	31.4
Average April 2009	6.3	59.8	3.0	59.2	40.8
Change from 08/09	-1.0	-7.6	+0.7	-9.4	9.4

Kent serviced accommodation occupancy data

It was a more positive picture for serviced accommodation this month with Medway, Sevenoaks, Shepway, Thanet and Tunbridge Wells all experiencing an increase in serviced occupancy during April. This can be attributed at least in part to the Easter break, but this factor makes the fall in occupancy for Ashford, Canterbury, Maidstone and Swale more extreme. Many of the visitors experienced by the attractions are potentially day trippers and so do not require accommodation.

District serviced accomm.	% room occupancy April 2008	% room occupancy April 2009	% change for month April		Length of stay April 2008	Length of stay April 2009	Change for month April
Ashford	60.5	58.4	-2.1		1.4	1.4	No change
Canterbury	56.3	45.6	-10.7		1.8	1.7	-0.1
Dover	58.7	55.9	-2.8		1.4	1.3	-0.1
Maidstone	69.7	59.2	-10.5		1.1	2.7	+1.6
Medway	44.4	47.0	+2.6		2.7	1.9	-0.8
Sevenoaks	50.6	75.3	+24.7		1.7	0	n/a
Shepway	38.9	54.5	+15.6		0	2.2	n/a
Swale	53.2	50.7	-2.5		2.2	2.0	-0.2
Thanet	36.1	47.0	+10.9		2.1	0	n/a
Tonbridge & Malling	No data	No data	Not applicable		No data	No data	No data
Tunbridge Wells	61.6	62.5	+0.9		1.2	2.6	+1.4
Kent average overall	51.8	54.3	+2.5		1.5	2.0	+0.5

Please note that for Sevenoaks data from 2008 is not confirmed

"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)

National accommodation data - Source: Visit Britain

Due to the more prompt feedback now available from Kent businesses through our system and liaison with Tourism South East, national data will be reported retrospectively as the UK occupancy survey is not available as frequently as our local data. However, data is now available for January and February 2009 as follows:

National serviced accommodation occupancy from the UK Occupancy survey Comparison between 2008 and 2009

	Bed space occupancy	Room occupancy	Location and differences in results
January 08/09	Down 2%	Down 3%	The greatest falls were in seaside locations and the smallest in country/village locations
February 08/09	Down 1%	Down 6%	The greatest falls were in small town locations, where a year on year fall of 9% was recorded.

These serviced room occupancy figures compare with Kent as follows:

	Kent	National figures
January	Down 8%	Down 3%
February	Down 10%	Down 6%

Kent seems to have fared poorly in the early part of this year compared to the national averages, however, because of our location to Europe it may be that more day trippers are coming to Kent rather than staying visitors. Also, as we do not have large cities in Kent, our accommodation is more likely to be of the 'small town' or seaside location.

Carrier News

Total passenger numbers for Channel Crossings including Port of Dover and Eurotunnel show that April, which included Easter this year, was busier than last April, which is to be expected. An average rise of 6% overall was experienced by all of the reporting carriers.

APRIL	2009	2008	% CHANGE
Passengers	1,233,738	1,161,903	Up 6%

Car and coach figures are only available for the Port of Dover and show that car journeys were quite dramatically up by 22%; however we do not know if these are incoming visitors to Kent or outgoing visitors to Europe. The recession and the strength of the Euro were quoted as factors affecting the levels of crossings. The ferries conducted a number of promotional offers to encourage crossings.

APRIL	2009	2008	% CHANGE
Car	114,843	94,159	Up 22%
Coaches	4,405	4,113	Up 7%

"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)

Tourist Information Centres

Please note that each of the TICs monitors its visitor numbers and stats in a slightly different manner, and so the TICs are not directly comparable with each other. Comparison can only be made by individual TICs of their own year on year figures (unless specified otherwise).

We would like to welcome STOP 24, the new visitor centre at Junction 11 of the M20, who have just begun to submit their visitor figures to the Barometer. Year on year comparisons are not yet possible, but we will report on each of their figures as soon as it is relevant to do so.

Visitor numbers at Kent TICs – April 2009

Visitor Numbers

TICs	% change 2008-9
Coastal	Up 20%
Urban	Down 8%
Rural	Insufficient sample
Kent overall	Up 2%

Telephone Enquiries

TICs	% change 2008-9
Coastal	Up 22%
Urban	Up 13%
Rural	Insufficient sample
Kent	Up 18%

Postal and Email Enquiries

TICs	% change 2008-9
Coastal	Down 8%
Urban	Down 8%
Rural	Insufficient sample
Kent	Down 4%

April was a better month for TICs, and in particular Tunbridge Wells's visitor information centre experienced a surge of visitors across all three channels in April. They report that the weather, Easter, and a rise in overseas visitor groups from France, Germany, Holland and Belgium have resulted in year on year increases to their figures. However a software problem with their mat counters and door clickers meant that their system was not providing reliable data for the 2008 figures. Another two TICs also reported an increase in overseas groups arriving by coach.

"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)

Figures for individual TICs April 08/09

Name	Footfall April 2009	Footfall April 2008	% change April 08/09	Phone calls Apr 2009	Phone calls for Apr 2008	Postal/email enquiries Apr 2009	Postal/email enquiries Apr 2008
Ashford	1000	1311	-24	363	451	220	183
Broadstairs	1336	868	54	67	22	0	0
Canterbury	38103	41597	-8	4373	2908	224	253
Deal Visitor Information Centre	1538	1684	-9	179	142	360	562
Discover Folkestone	0	0	n/a	840	675	222	247
DOVER	7661	6942	10	1549	1498	178	111
Faversham	1509	1022	48	152	0	96	0
Gravesend	4627	3532	31	386	480	328	300
Maidstone Visitor Information	2832	7673	n/a	381	444	48	52
Margate	4137	3954	5	335	255	45	80
Medway VIC	24998	23363	7	852	1349	246	367
Ramsgate	4317	2740	58	222	144	44	54
Royal Tunbridge Wells	8375	4594	82	425	221	386	305
Sandwich	2571	1993	29	81	78	33	12
STOP24	2069	n/a	n/a	Not recorded	Not recorded	Not recorded	Not recorded

Maidstone TIC has changed its organisational structure between 2008 and 2009 and so accurate comparison is not possible. Tunbridge Wells experienced some software problems in recording its 2008 figures

Factors quoted as affecting the TICs level of business (sic)

Weather, Economic Climate
More people taking domestic holidays
Exchange rate, weather, music festivals and spring events
Early in the season but we are getting quite busy now.
Still have weak £ and strong Euro so enquiries from Continental Europe are strong
Strong pound and Cruise business
Easter/better weather
Visitor numbers have increased due to the launch of our Heritage festival.
Credit crunch
Recession - less disposable income, which has reduced spend in the shop.
Credit crunch - more people taking domestic holidays
Good weather, Easter break in April in 2009.
Economic climate
Number of cars stopping at the service area.

"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)

Nationality of TIC visitors

Canterbury, Dover, Medway and Tunbridge Wells are the top four TICs for European visitors, with Thanet TICs, Maidstone and Gravesend having the greatest proportion of domestic visitors.

April 2009	% Domestic Visitors	% Long Haul Visitors	% European Visitors
Ashford	86	4	10
Broadstairs	83	1	16
Canterbury	40	10	50
Deal Visitor Information Centre	80	5	15
Discover Folkestone	80	8	12
DOVER	60	10	30
Faversham	88	4	8
Gravesend	95	1	4
Maidstone Visitor Information	96	2	2
Margate	98.3	0.2	1.5
Medway VIC	65	5	30
Ramsgate	99.5	0.1	0.4
Royal Tunbridge Wells	60	10	30
Sandwich	80	8	12

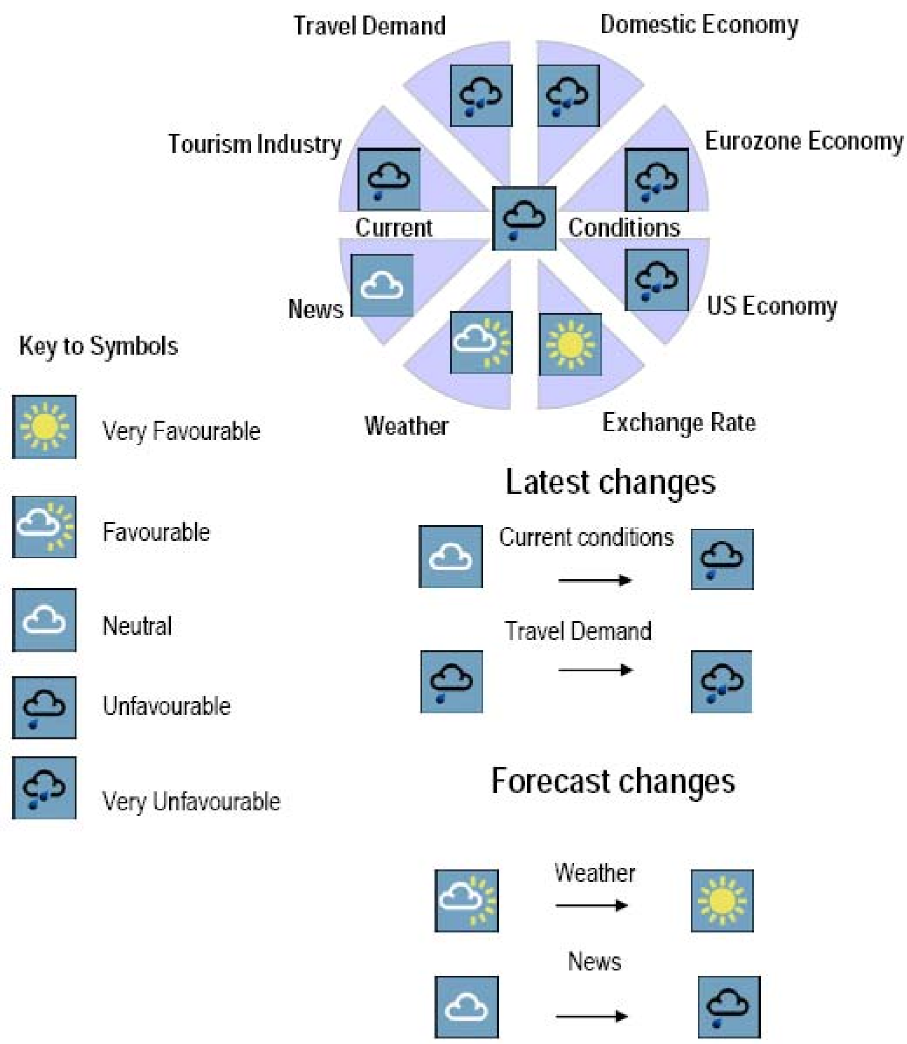
Other News

Other news from Visit Britain

- The number of overseas residents visiting the UK in the three months from January to March 2009 was down 13% compared with the same period of 2008, whilst total spend over this period was neither up nor down in nominal terms.
- Sterling was (on average) 29% weaker against the US dollar and 16% weaker against the Euro in March 2009 compared to March 2008, meaning that most visitors' currencies are going further, with each visitor spending more on average.

"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)

Factors contributing to tourism trends in Britain, April 2009



If you have any questions, comments or suggestions regarding this document please contact Tracey Parker on 01227 862792 or email on tracey.parker@visitkent.co.uk . If you do not yet contribute your data but would like to participate, please also contact Tracey as above.

"Investing in your future"
Cross-border Cooperation Programme 2007-2013
Part-financed by the European Union (European Regional Development Fund)