



Visit Kent's Business Barometer August 2009

Headlines

Up until the end of August there have been 8% more visitors to Kent's attractions in 2009 compared to the same period in 2008. It is estimated by Visit Kent that this has been worth at least £8 million to Kent's economy so far this year.

Comparison August 2008/2009

Kent Attractions Visitor Numbers - Up 10%

71% of attractions reported a rise this month, with gardens, heritage attractions and tour/transport attractions doing best. Indoor attractions and museums have fared less well in the good August weather. French and Dutch visitors were the highest in number, but there has been a considerable rise in German visitors compared to July with 7 attractions citing them as their biggest visitor group.

Kent Serviced Accommodation - Down 4%

54 accommodation providers submitted data this August and showed a mixed picture of results.

Kent Self Catering Unit Occupancy - Up 18%

Self Catering accommodation providers appear to have experienced a rise in occupancy during August, and mostly from UK visitors.

TIC Visitor Numbers - Up 8%

Nine TICs have reported a significant rise in their European visitors during August. There are also reports of strong visitor numbers from cruise ships docking in Kent, and the new high speed train.

Cross Channel Passengers - Down 5%

Some carriers have advised Visit Kent that they have improved their sales by advertising and communicating the value for money offered in ferry travel, and that this 5% fall overall covers a mixed picture of performance across inbound and outbound.

Other indicators

- A maximum August temperature of 30.3 degrees Centigrade was recorded in Gravesend, Kent
- Website visits to www.visitkent.co.uk are up by 35% compared with August last year, and a 75% increase for page views which shows visitors are lingering longer and searching for more detail.
- The top performing overseas countries are (according to our sample) – 1. Netherlands, 2. France and 3. Germany although some attractions noticed a dramatic increase in German visitors.

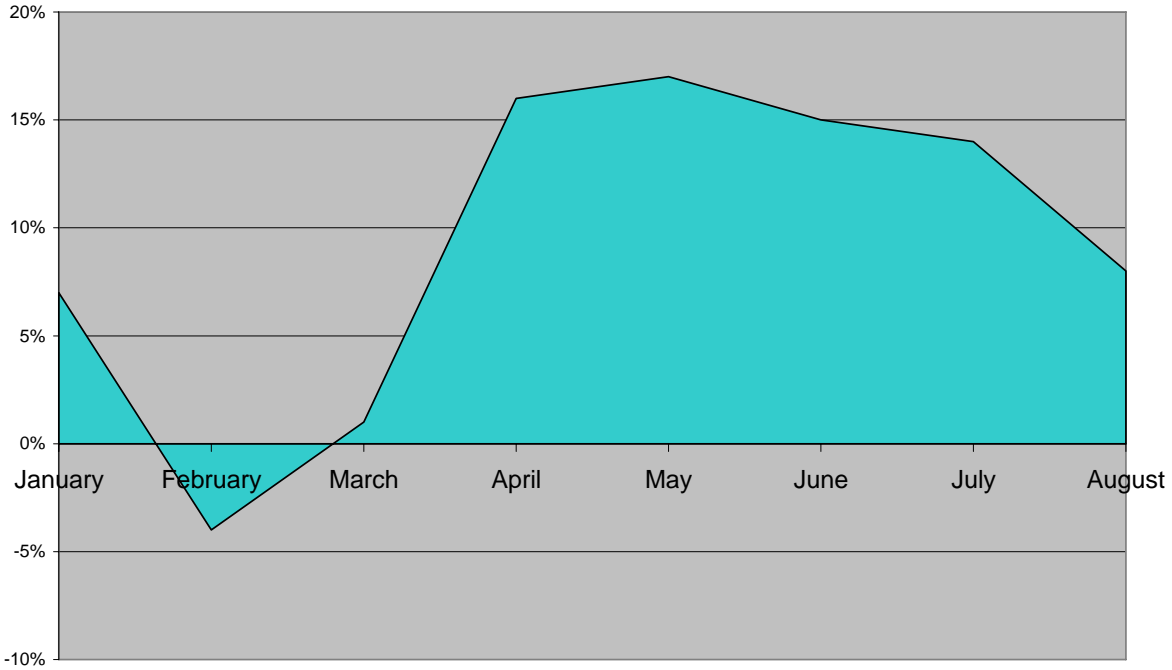
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The year to date visitor figures from our sample (excluding retail) will be included in each Business Barometer from this month onwards.

**% change in visitor numbers for year to date compared to 2008
(provisional sample)**



Visitor Numbers year on year (2008/09)

	2008	2009	% change for month	Year to date Totals 2008	Year to date Totals 2009	% change for year to date
Jan	89,795	95,732	7%	89,795	95,732	Up 7%
Feb	118,393	103,238	-13%	208,188	198,970	Down 4%
Mar	215,604	229,804	6%	423,792	428,774	Up 1%
April	285,411	390,732	37%	709,203	819,506	Up 16%
May	439,505	523,873	19%	1,148,708	1,343,379	Up 17%
Jun	349,459	380,508	9%	1,498,167	1,723,887	Up 15%
Jul	728,916	810,604	11%	2,227,083	2,534,491	Up 14%
August	717,156	787,355	10%	3,014,438	3,251,647	Up 8%



Kent Visitor numbers in August

Visitor numbers were up by 10% in August.

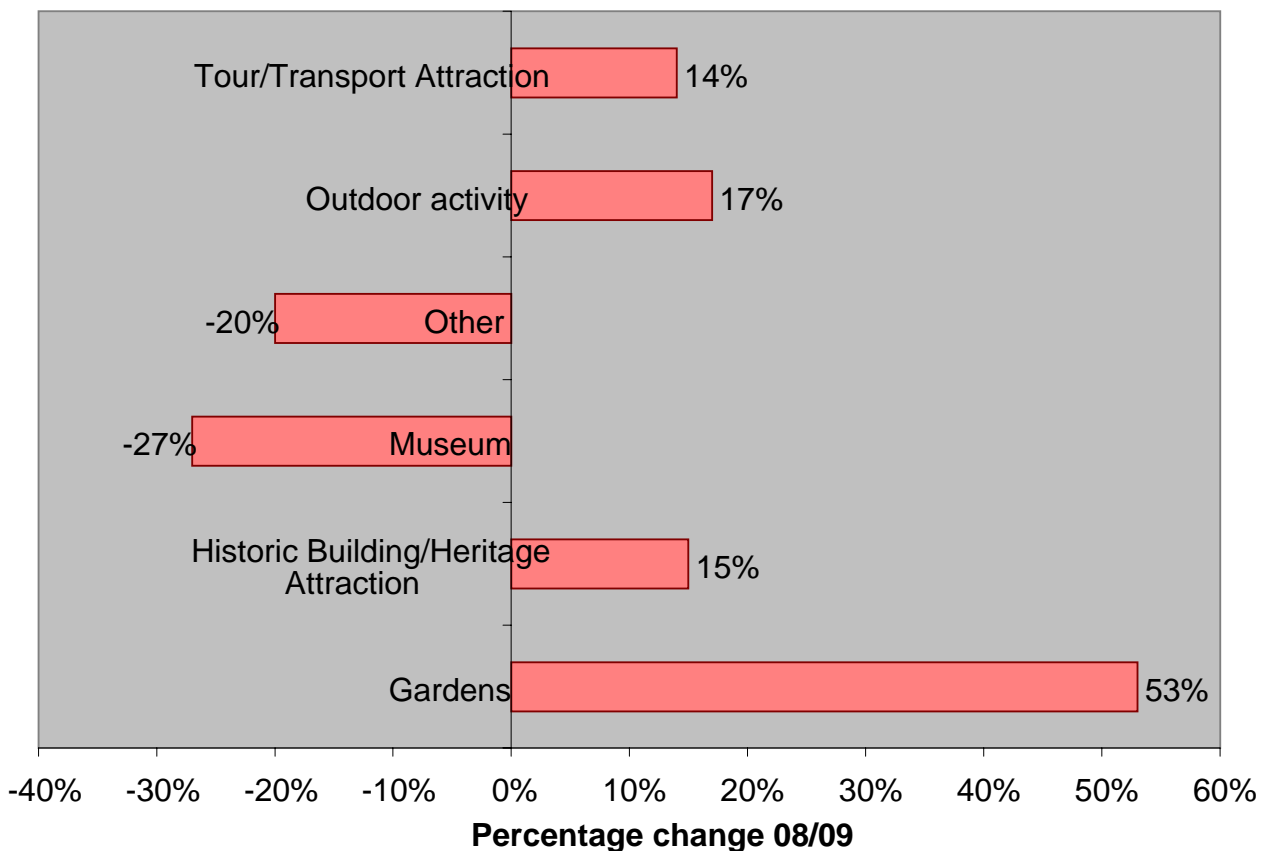
Visitor numbers	2009	2008	% Change
	787355	717156	Up 10%

Range of performance amongst attractions overall

Of the 42 attractions reporting, 12 reported a fall in visitor numbers ranging from -4% to -40%. The remaining 30 attractions reported a rise ranging from 1% to 500% (a small attraction). However, from those 30 attractions, 5 reported a less than 5% rise, 3 reported a 5-10% rise, 7 reported a 10-20% rise, 5 reported a 20 – 30% rise, and 10 reported greater than a 30% rise.

Performance according to attraction type (% change since last August)

Gardens have done particularly well in August and people have taken advantage of the good August weather.



Performance according to attraction location

Coastal attractions, of which the sample is mainly 'historic building and heritage' attractions, have benefited the most in August.

Coastal Up 27%	Rural Up 6%	Urban Up 4%
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Performance according to attraction cost

The free attractions are down considerably with the sample mainly museums for this month.

Charging Up 11%	Free Down 26%
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Performance according to attraction size

Although all have done well, it would seem that the larger the attraction, the better their results.

Visitors of 20,000 or less	Visitors of between 20,001 and 50,000	Visitors of between 50,001 and 100,000	Visitors of between 100,001 and 200,000	Visitors of over 200,000 per year
Up 10%	Up 13%	Up 15%	Down 3%	Up 12%

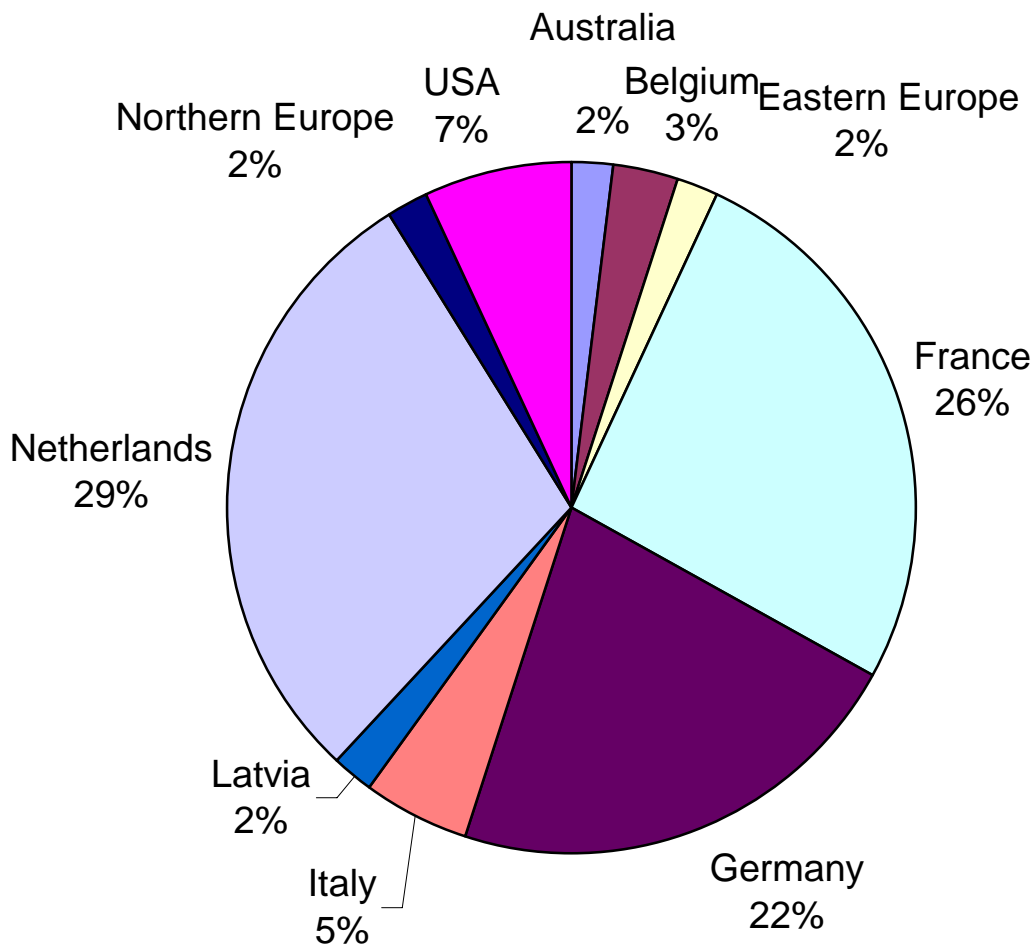
Factors affecting attraction results

Many attractions cited the excellent weather as bringing good visitor numbers to their attraction during August. Other factors were:

Positive
People holidaying at home
Strong Euro
Effective online discount promotion
Increased European Visitors
More group visits
Perceived good value in a recession
More people from France and Germany
Stronger marketing campaigns and good publicity
Greater awareness of the attraction
Revised opening days
Tactical discounts

Negative
Change of exhibition type not working as well as last year
Events held last year not held this year
Dry weather adversely affecting the attraction
Recession
Less French visitors and more Dutch and Belgian

**Overseas visitors to attractions in August
(Based on the top two nationalities each attraction cited)**



The top three origin countries who made up the top two overseas visitors to attractions were Netherlands (cited by 29% of sample) France (cited by 26% of the sample) and Germany (22%). German visitors featured more prominently in feedback this month compared to last month.



CARRIERS

The Carrier figures represent the totals of the crossings through Port of Dover and Eurotunnel combined, both inbound and outbound. Although for some, car crossings were up, in the main passenger and coach journeys were down. Feedback also indicates that the August Bank Holiday weekend was strong across all carriers, but the recession was still taking its toll.

AUGUST	2008	2009	% CHANGE
Passengers	1,874,257	1,788,571	Down 5%
Cars	494,006	482,452	Down 2%
Coaches	8,998	7,733	Down 14%

ACCOMMODATION

Kent serviced accommodation occupancy data

The picture is very mixed across serviced accommodation with a range of occupancy changes from 40% down to 13% up. As the sample is small for serviced accommodation at the present time, a small change in sample size can skew the results. Visit Kent will be working with the Districts over the coming months to increase and improve the sample and make the data more relevant for businesses to benchmark against.

Kent serviced accommodation occupancy data August 2008/9

District serviced accomm.	% room occupancy August 2008	% room occupancy August 2009	% change for month August	Length of stay August 2008	Length of stay August 2009	Change for month August
Ashford	76.6	81.0	Up 4.4	1.4	1.6	Up 0.2
Canterbury	75.7	36.0	Down 39.7	1.5	1.6	Up 0.1
Dover	78.5	79.0	Up 0.5	1.5	1.6	Up 0.1
Maidstone	74.7	65.0	Down 9.7	2.6	1.8	Down 0.8
Medway	68.9	50.0	Down 18.9	1.9	1.8	Down 0.1
Sevenoaks	Insufficient sample	Insufficient sample	Insufficient sample	Insufficient sample	Insufficient sample	Insufficient sample
Shepway	62.5	75.0	Up 12.5	2.0	2.0	No change
Swale	66.9	56.0	Down 10.9	2.0	1.7	Down 0.3
Thanet	63.0	68.0	Up 5.0	2.0	1.7	Down 0.3
Tunbridge Wells	66.3	76.0	Up 9.7	1.7	2.0	Up 0.3
Kent overall	71.2	67.0	-4.2	1.8	1.8	No change

Please note that the sample for Medway is small and from smaller accommodation providers, Canterbury's sample is smaller than last year and no providers for the Tonbridge and Malling or Dartford area submit their figures to the Business Barometer. It is hoped that this can be resolved through the new accommodation occupancy system to take effect on 1st January 2010.

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Kent self catering occupancy data

The self catering occupancy data sample from Tourism South East shows a rise in net unit occupancy for the month at 18% with an increase in stay of 1 day, and an increase in UK residents of 3%. The sample for August 2009 is slightly smaller than August 2008, and so this should be borne in mind when interpreting the results.

	Average Stay	Net unit occupancy	Average Party size	% UK residents	% Overseas residents
Average August 2008	7.1	71.3	3.6	64.4	35.6
Average August 2009	8.1	89.0	3.3	67.6	32.4
Change from 08/09	+1.0	+17.7	+0.3	+3.2	-3.2

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).

Visitor numbers at Kent TICs – August 2009

Name	Footfall August 2009	Footfall August 2008	% change August 08/09	Phone calls August 2009	Phone calls for August 2008	Postal/email enquiries August 2009	Postal/email enquiries August 2008
Ashford	1735	1451	20	767	690	270	195
Broadstairs	3232	3317	-3	141	102	0	0
Canterbury	51092	41973	22	2701	1784	57	139
Deal	2419	1990	22	219	155	81	78
DFH&RM	0	0		1541	1587	415	441
Dover	23073	20205	14	3466	3610	1412	1370
Faversham	2430	2352	3	172	0	75	0
Gravesend	4871	5161	-6	290	403	235	235
Maidstone	6825	6198	10	402	625	22	24
Margate	9016	9011	0	701	537	7	44
Medway	31247	29529	6	777	979	126	74
Ramsgate	5883	8520	-31	515	441	40	110
Royal T. Wells	11162	11719	-5	622	542	337	229
Sandwich	4586	3965	16	236	153	14	10
STOP24	2018	n/a		0	0	0	0

No figures are submitted for Dartford, Tonbridge and Malling, or for Sevenoaks TICs.

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2 Měsíční Společný Zásah INTERREG N. A.
"Investing in your future" Cross-border Cooperation Programme 2007-2013
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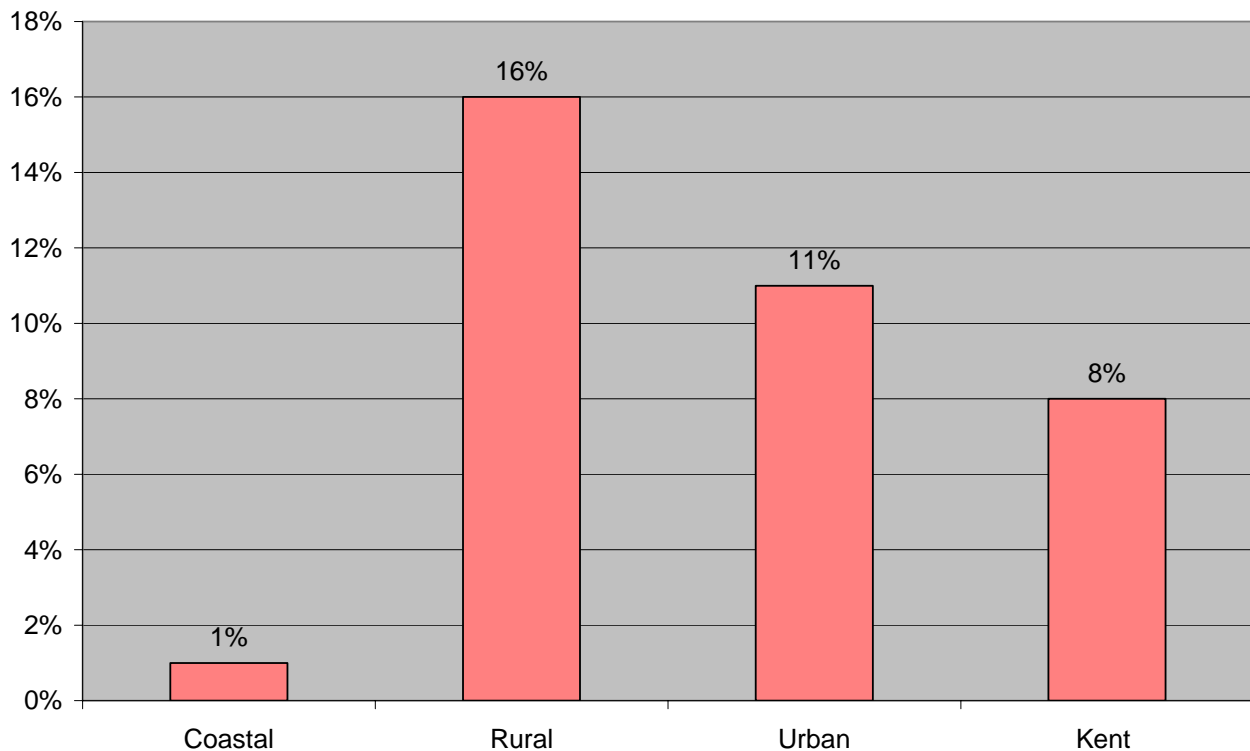


Factors affecting visitor numbers to the TICs in August 09

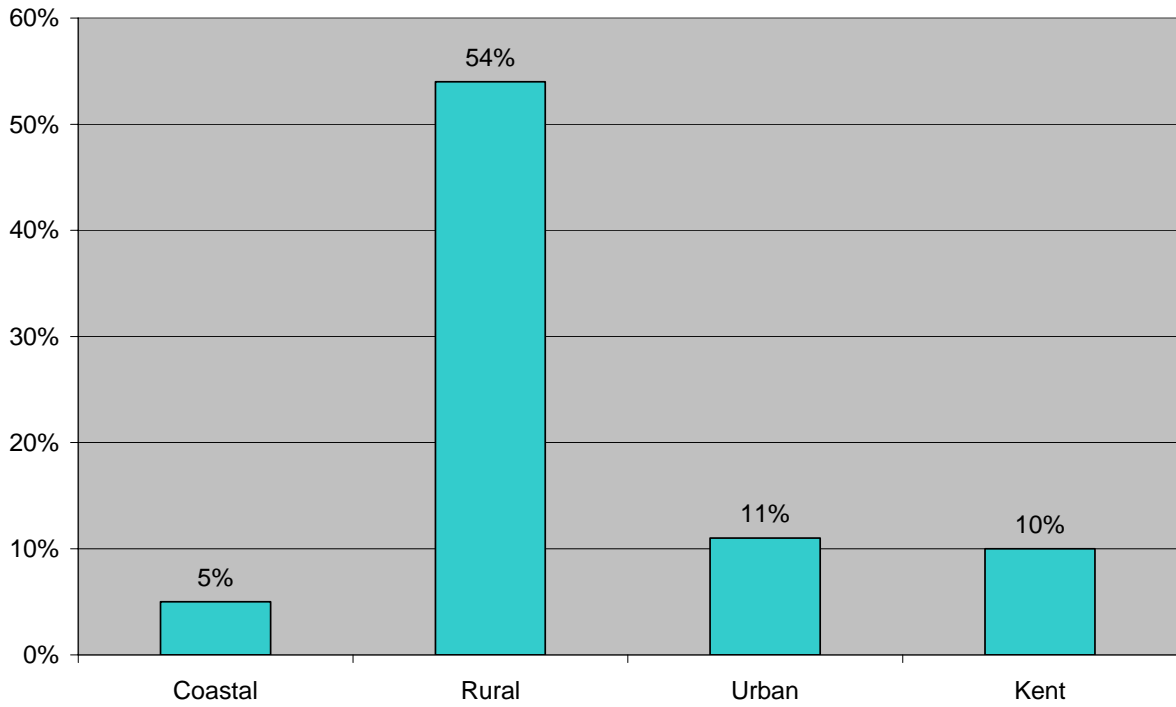
TICs are experiencing a mixed month with Ramsgate 31% down on visitor numbers whereas Ashford, Canterbury and Deal all are around 20% up. The positive factors affecting the TICs were cited as increases in visitors due to cruise liner stopovers, high speed train users, increased European visitors and the strong Euro. Negative factors were cited as the economic climate, and a reduction in events in the area. From the following charts it can be seen that for Kent overall TIC visitor numbers were up by 8%, and rural and urban TICs did well with face to face visitors. The coastal picture for face to face visitors was mixed, with some doing very well, and others particularly badly, which resulted in an average rise of 1%.

For telephone enquiries, rural TICs were 54% up on last year, which would indicate more planned day trips to the countryside. Overall telephone enquiries in August were up 10%. For postal and email enquiries, the coastal TICs experienced a fall, whereas urban and rural TICs online and postal enquiries increased by 11% and 16% respectively.

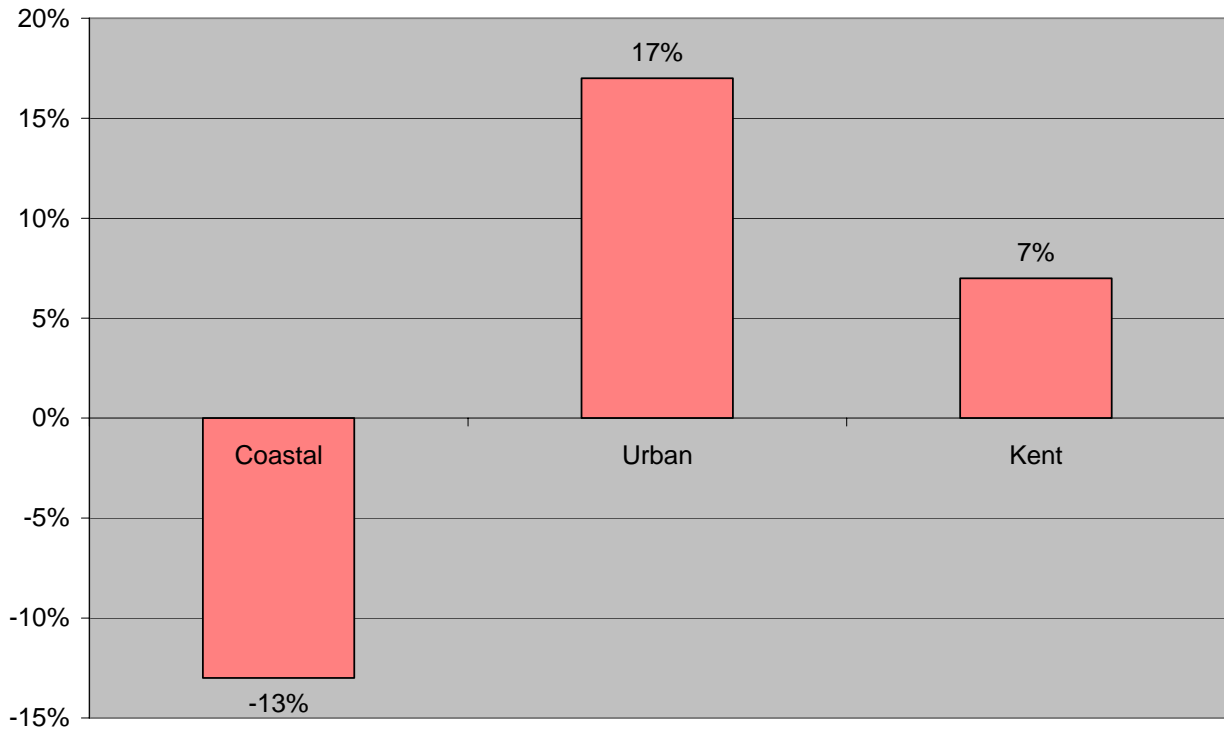
TIC visitor numbers % change 2008/9



Telephone enquiries % change 2008-9



Postal and Email enquiries % change 2008-9



Origin of TIC visitors

The table below shows the percentage of each type of visitors, and now that we have more than 1 year's data we can start to see some patterns emerging. In nearly all cases each TIC has had a considerable influx of additional European visitors in August.

August 2009	% Domestic Visitors	% Long Haul Visitors	% European Visitors	Comparison to August 2008
Ashford TIC	70	2	28	8% more European visitors
Broadstairs	90	2	8	4% more European visitors
Canterbury	15	25	60	30% more European visitors
Deal	70	5	25	17% more European visitors
DFH&RM	80	5	15	9% more European visitors
Dover	50	18	32	8% more European visitors
Faversham				Did not submit
Gravesend	87	4	9	
	86	10	4	Did not submit
Maidstone Visitor Information	96	2	2	Same as last year
Margate	95	1	4	2% more European visitors
Medway VIC	65	5	30	5% more European visitors
Ramsgate	98	1	1	1% less European visitors
Royal Tunbridge Wells	50	40	10	10% more European visitors
Sandwich				Did not submit
	85	2.5	12.5	
STOP24	d/k	d/k	d/k	n/a



Visit Kent News

Visit Kent Research

The Visit Kent research team has begun work on the research programme for SusTRIP, the Sustainable Tourism Research and Intelligence Programme which will provide baseline type research on events impacts, economic impact, existing visitors, potential visitors, accessibility and communication technology. If you are interested or would like to know more details contact the research team on 01227 862792.

Visit Kent Marketing

Visit Kent's new London Campaign with Southeastern was launched in July and features seventy-five 2FOR1 offers, figures show that there have already been over 35,000 visits to the dedicated website www.visitkentbytrain.co.uk

So far 3,726 vouchers have been downloaded, the most popular ones being for Leeds Castle, Howletts and Port Lympne Wild Animal Parks, Dover Castle, Hever Castle and Canterbury Cathedral

Visit Kent Website

The number of visitors to the Visit Kent consumer website gives an indication of the level of interest in Kent on the web. For the August comparison 2008/9 the site received 36% more visits in August than last year and 76% more page views which shows visitors have an increased interest in looking beyond the home page at the detail behind.

Visitors to www.visitkent.co.uk

August 2008	August 2009
136,785	185,490

The Visit Kent business to business website (www.visitkentbusiness.co.uk) also continues to grow with 9,453 visits and 30,624 page views since its inception in December.

Other News

Visit Britain Trends Update 112

- Heathrow airport had its busiest August on record according to BAA
- The French government reports that the number of foreign visitors to France was 14.5% down on 2008 during July and August, but domestic tourism in France was up by 6.3% over this period according to data from hotels, holiday homes and campsites
- According to Hotels.com the average price of a hotel room in the UK was 16% lower than a year ago in the first half of this year, meaning that room rates are now back at 2004 levels

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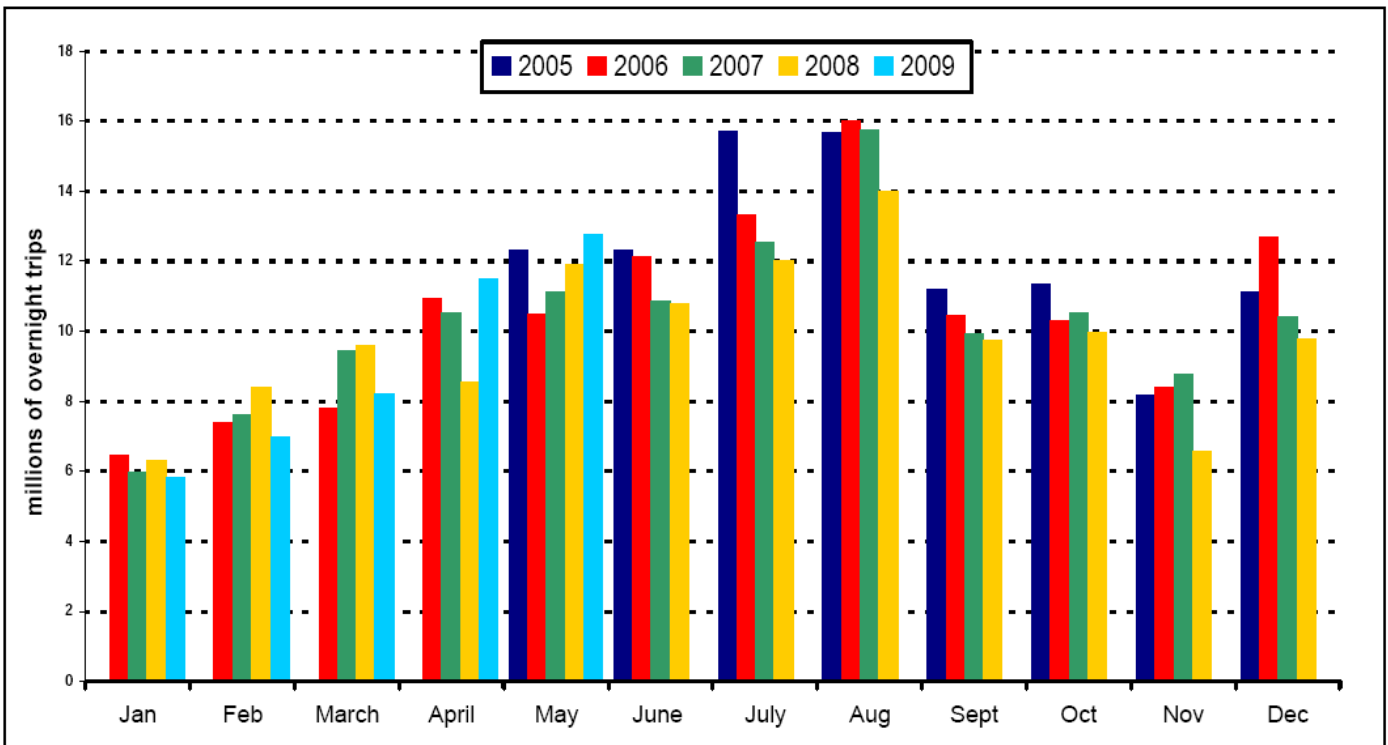
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UK Tourism Survey – May 2009

This document is available on www.enjoyengland.com and shows a surge in Domestic visitors within the UK during April and May (the date up to which their information is available). This matches the increase in visitors noticed in Kent in these months reported in previous Barometers. The Barometer for April showed an increase of 37% in visitor numbers (Easter being a factor) and May showed an increase of 19% in visitors overall, and many attractions commented on a noticeable increase in UK visitors. The table below gives a broader picture of how Domestic Trip Volume has changed over the last 4 – 5 years.

UK All Trips – Domestic Trip Volume by Month



National accommodation data - Source: Visit Britain

National data will be reported retrospectively as the UK occupancy survey is not available as quickly as our local data. From the UK figures, serviced bed space occupancy for England in August 2009 remained unchanged, but room occupancy fell by 1% compared with Kent which was down 2%.

National Data on attractions (Source International Passenger Survey)

The most recent International Passenger Survey for July shows that for the year to date overseas visitors to the UK are down by 9%. The origins of visitors and the percentage changes are detailed below:

	JULY		3 MONTHS TO JULY		YEAR-TO-DATE		TWELVE MONTHS TO JULY	
	Visits	% change	Visits	% change	Visits	% change	Visits	% change
	(000)	09/08	(000)	09/08	(000)	09/08	(000)	09/08
North America	440	-8	1,130	-16	2,050	-17	3,380	-21
EU15	1680	-7	4,880	-2	10,410	-3	17,990	-4
A12	250	-17	700	-18	1,530	-24	2,840	-16
Rest of Europe	200	2	490	-5	1,050	-11	1,910	-7
Rest of World	540	-5	1,310	-3	2,320	-10	4,160	-11
Total Visits	3,120	-7	8,520	-6	17,350	-8	30,280	-9
	Spend	% change	Spend	% change	Spend	% change	Spend	% change
	(£m)	09/08	(£m)	09/08	(£m)	09/08	(£m)	09/08
Total Spend	1,650	-8	4,500	-4	8,930	-2	16,100	-2

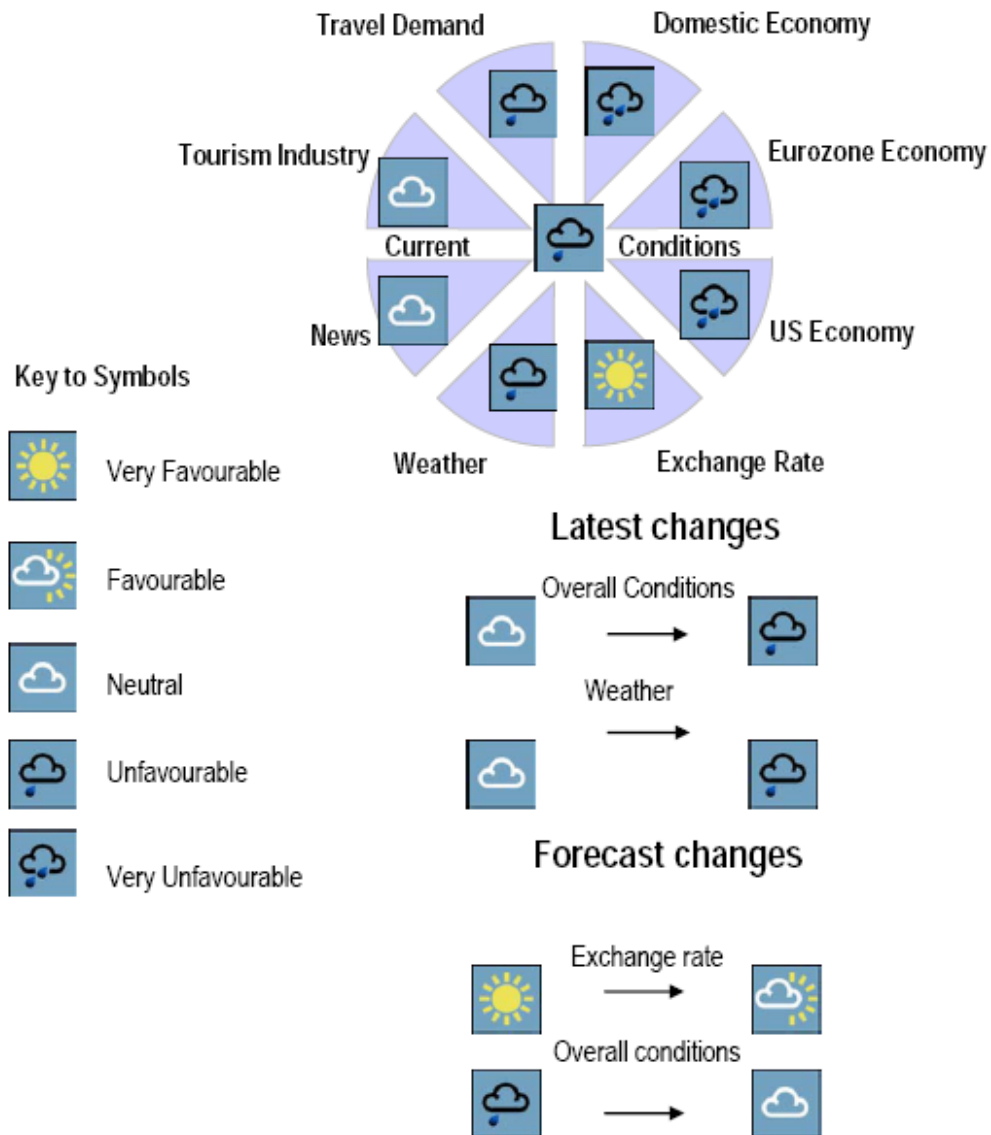
Weather August 2009 (Source www.bbc.co.uk)

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.

According to the BBC, it was an unsettled theme for much of August with showers or longer outbreaks of rain, particularly affecting north-western areas. In contrast, the south-east also enjoyed plenty of dry, warm days. During the first week, the wettest day was the 6th when heavy rain produced falls of 40 to 60mm in places in central and eastern England.

However for the month as a whole it was dry over much of Wales, the west Midlands, southern England and, especially, East Anglia with some places receiving less than half the normal amount. Sunshine totals were close to or below normal across much of the UK, eastern areas faring best with around 110% of normal. A maximum temperature of 30.3C was recorded at Gravesend (Kent) on the 19th.

Factors contributing to tourism trends in Britain, August 2009



Source: Visit Britain – Trends Update Issue 110 (13th August 2009)