

Visit Kent's Business Barometer November 2009 Headlines

Kent has experienced a rise in visitor numbers of 8% to the end of November, compared with 2008. Word of mouth feedback indicates that many accommodation providers have also experienced a better year than expected. This is positive news for Kent in an economic climate which has proved tough for other industries. The November figures below show clearly that uncontrollable factors such as the weather have an impact on the industry as a whole, which in turn affects performance.

Comparison November 2008/2009

Kent Attractions Visitor Numbers

- Down 8%

November is traditionally the first month of closure for a number of attractions which affects the sample size and spread.

Kent Serviced Accommodation

- No change

Results varied across the Districts ranging from 38% down to 13% up

Kent Self Catering Unit Occupancy

- Down 16%

The proportion of overseas visitors staying overnight was comparable to 2007, but staying visitors generally were down in November compared to 2008.

TIC Visitor Numbers

- Down 4%

The exceptionally poor weather discouraged exploring in November, and so visitor numbers were down.

Cross Channel Passengers

- Down 3%

Car crossings this month were up by 8% due to a number of tactical promotions.

Other indicators

- ◆ November was the wettest November since 1914 (BBC) and dramatically affected open air attraction visitor figures.
- ◆ The rain affected coastal and rural attractions in particular.
- ◆ In November 2008 Kent self catering providers experienced a surge in interest due to the favourable exchange rate, and the expectation that this favourable rate might be short lived. This has balanced out in the November 2009 figures.
- ◆ 14% of respondents to the conversion research visited Kent as a direct result of the information that they had received from Visit Kent.

ATTRACTIONS

The year to date visitor figures from our sample (excluding retail) are:

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%
Sept	252,726	269,014	6%	3,267,164	3,520,661	Up 8%
October	273,841	311,606	14%	3,541,005	3,832,267	Up 8%
November	124,674	114,483	-8%	3,665,679	3,946,750	Up 8%

Kent Visitor numbers in November

Visitor numbers	2009	2008	% Change
	114,483	124,674	Down 8%

Range of performance amongst attractions overall

11 attractions experienced a fall in visitor numbers ranging from 2% to 87%, 2 attractions remained the same as last year. 8 attractions experienced a rise in visitor numbers ranging from 3 to 92%. 3 further attractions were unable to be compared as they had not been open in November in both years.



**Performance according to attraction type
(% change since last November)**

Historic Building/Heritage Attraction	Museums	Other attractions
-8%	-4%	-14%

The November results reflect the performance of those attractions that are open, i.e. it excludes those that are closed e.g. Zoos and Gardens. As the sample for some groups were too small for separate analysis, they have been added to the 'Other' group for this month.

Performance according to attraction location

Coastal and open air attractions were badly affected by the heavy rainfall this month.

Coastal	Rural	Urban
-50%	-8%	-1%

Performance according to attraction cost

The performance according to attraction cost reflects the type of attractions open at this time of year as many are free Museums.

Charging	Free
-2%	Up 9%

Performance according to attraction size.

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
-9%	+15%	-9%	+12%	-11%

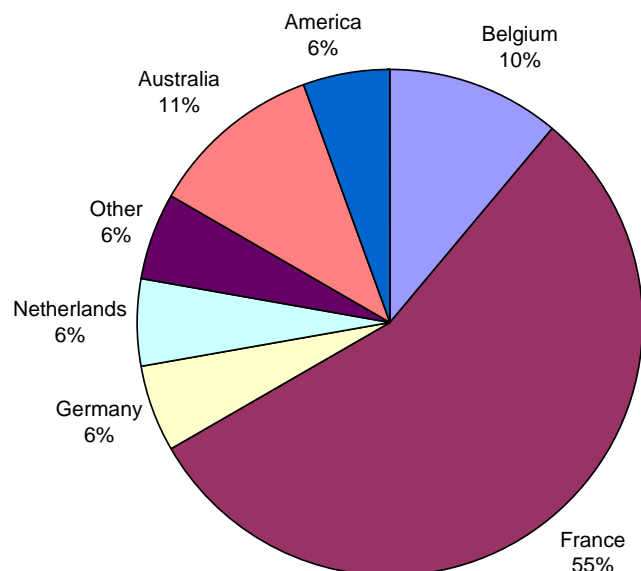
Factors affecting visitor attraction results

Positive
Additional visitors staying in the area, especially at weekends
Earlier Christmas shopping
Exhibition & events provision
Good weather and Christmas events
Low pound
More volunteers

Negative
Fewer group visits
Fewer operating days
Need for more marketing, reduction in general individual visitors and overseas groups.
Problems with heating systems
Quite a drop in visitors - groups were down in November, as were general visitors

Overseas visitors to attractions in November

Of the 18 attractions that were able to identify the main overseas visitor group to their attraction, 55% stated that French visitors were the most prevalent in November 2009. French visitors were also most prevalent in November 2008. This is the most popular month for school visits from French schools.



CARRIERS

These figures are the combined totals for the Port of Dover and Eurotunnel and show an 8% increase in cars on last year, but a 3% fall in passengers. Coaches were virtually the same as last year. In November 2008, channel crossings were affected by the fire in the tunnel, but in 2009 a number of promotions have helped to boost the number of car crossings.

November	2008	2009	% CHANGE
Passengers	674031	654294	-3%
Cars	188611	203878	+8%
Coaches	5667	5653	-0.2%

ACCOMMODATION

Kent serviced accommodation occupancy data November 2008/9

District serviced accomm.	% room occupancy November 2008	% room occupancy November 2009	% change for month November	Length of stay November 2008	Length of stay November 2009	Change for month November
Ashford	39.9	48.2	+8.3%	1.5	1.3	-0.2
Canterbury	60.8	22.8	-38%	1.6	1.5	-0.1
Dover	43.8	44.5	+0.7%	1.4	1.2	-0.2
Maidstone	43.5	47.4	+3.9%	2.3	1.9	-0.4
Medway	56.3	44.7	-11.6%	1.9	1.9	No change
Sevenoaks	23.9	Too small a sample	Too small a sample	1.8	Not available	N/a
Shepway	30.1	43.2	+13.1%	1.9	1.5	-0.4
Swale	63.4	50.9	-12.5%	2.5	1.3	-1.2
Thanet	37.7	44.0	+6.3%	2.0	Not available	N/a
Tunbridge Wells	51.9	62.5	+10.6%	2.3	2.1	-0.2
Kent overall	45.4	45.4	No change	1.8	1.6	-0.2

Kent self catering occupancy data

	Average Stay	Net unit occupancy	Average Party size	% UK residents	% Overseas residents
Average November 2008	7.0	54.2	2.3	43.0	57.0
Average November 2009	6.8	37.8	3.6	68.3	31.7
Change from 08/09	-0.2	-16.4	+1.3	+25.3	-25.3

TOURIST INFORMATION CENTRES

Each of the TICs monitors visitor numbers in a slightly different way, so 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 – November 2009

Name	Footfall November 2009	Footfall November 2008	% change November 08/09	Phone calls November 2009	Phone calls for November 2008	Postal/ email enquiries November 2009	Postal/ email enquiries November 2008
Ashford	851	792	7	230	399	323	221
Broadstairs	213	150	42	9	14	0	0
Deal	1154	1073	8	107	125	50	67
DFH&RM	0	0		594	543	258	170
Dover	3743	4109	-9	477	599	392	450
Faversham	1124	943	19	121	0	79	0
Gravesend	2165	2267	-4	269	355	339	437
Maidstone	5415	5299	2	390	438	26	61
Margate	1697	1785	-5	131	132	8	37
Medway	14515	16821	-14	840	1504	264	503
Ramsgate	2303	1464	57	49	41	2	4
Royal T. Wells	4985	4976	0	490	488	178	228
Sandwich	0	0	n/a	0	0	0	0
STOP24	1070	0	n/a	0	0	0	0

NOTE: Unfortunately due to a computer problem Canterbury were unable to provide their figures before the deadline.

Factors affecting visitor numbers to the TICs in November 09

Negative Factors

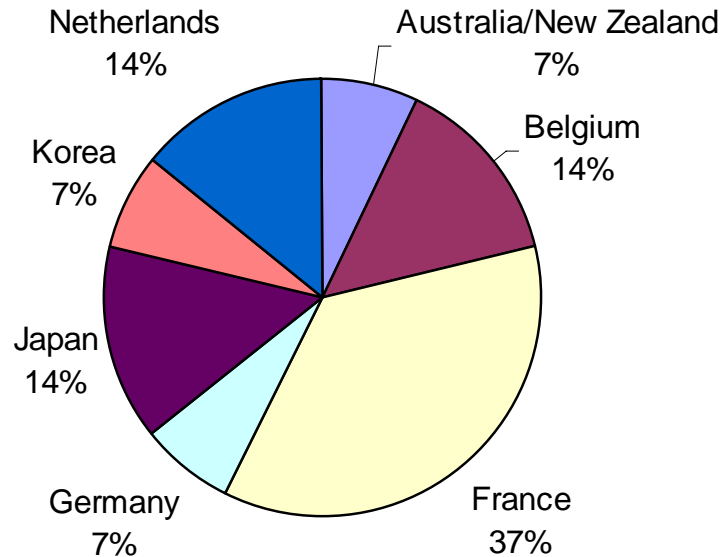
- Weather
- Recession
- Drop in overseas groups

Positive Factors

- A surge of enquiries from European visitors and hits to the website - higher for European than UK visitors
- Towards the end of the month visitor numbers picked up, probably due to people doing their Christmas shopping
- Fall in postal enquiries countered by a rise in website visits

Origin of TIC visitors

The pie chart below indicates the top overseas visitor groups to the TICs, with France being the most common origin for November.



Origin of visitors, and comparison of European visitor numbers 2008/9

November 2009	% Domestic Visitors	% Long Haul Visitors	% European Visitors	Comparison to November 2008
Ashford TIC	90	1	9	Up 1%
Broadstairs	75	5	20	No figures
Deal	98	0	2	Up 3%
DFH&RM	98	0	2	No change
Dover	70	5	25	Up 5%
Faversham	93	3	4	Up 3%
Gravesend	93	4	3	Up 1%
Maidstone	98.5	0.5	1	No change
Margate	98.75	1	0.25	No figures
Medway	75	5	20	Up 5%
Ramsgate	98	0	2	No figures
Royal T. Wells	85	5	10	Up 5%

NOTE: Unfortunately due to a computer problem Canterbury were unable to provide their figures before the deadline

Visit Kent News

Visit Kent Research

The Conversion Research completed in November obtained the following feedback on Kent and Visit Kent marketing activities:

- ◆ 14% of respondents visited Kent as a direct result of the information they had received from Visit Kent.
- ◆ It was estimated that Visit Kent activities (based on the English speaking database) had contributed over £8 million to the Kent economy.
- ◆ Further research to the European database is currently taking place to identify the economic impact of Visit Kent activities.

- ◆ The top 6 factors that influenced the decision to visit Kent were:
 - Historic aspects/heritage (60% of respondents)
 - Attractive countryside (50%)
 - Seaside beaches (38%)
 - Country pubs (30%)
 - Visiting friends and relatives (26%)
 - Visitor attractions (26%)
- ◆ The top 5 towns/cities visited were:
 - Canterbury 48%
 - Dover 33%
 - Tunbridge Wells 30%
 - Maidstone 28%
 - Whitstable 23%
- ◆ Visit Kent magazine – 44% of the respondents had seen the magazine in either printed or online version. 34% of those that had seen the magazine stated that it had particularly influenced their decision to visit Kent. 29% stated that it had encouraged them to stay longer than originally planned.

Visit Kent Marketing

Visit Kent's London Campaign with Southeastern has resulted so far in 45,271 visits to the website www.visitkentbytrain.co.uk, 4,986 vouchers downloaded, and 7,275 redemptions (from both website and brochure).

The Europe Campaign is performing extremely well with over 118,900 visits to the foreign language websites since April 09. 38 journalists have been hosted and €829,853 has been generated in press coverage to date.

The VIP campaign has continued activity in the US and domestic market focusing on Kent's famous connections (modern and historical). Many activities have been taking



place, including attendance at the United States Tour Operators Association (USTOA) where over 30 key buyers were met with on an individual basis.

Visit Kent Website
Visitors to www.visitkent.co.uk

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 November comparison 2008/9, visits to the website went up by 89% and page views by 112%.

November 2008	November 2009
88,661	167,098

Visitors to www.visitkentbusiness.co.uk

The number of visitors to the Visit Kent business website gives us an indication of how frequently Kent businesses are consulting our website for information. Year on Year comparisons will be made with effect from January, but in the meantime visits to the site in November 2009 were 1,308 and page views 3,420.

Other News

Visit Britain Trends Update 118 (9th December 2009)

- ◆ Latest TRI Hospitality Consulting figures show that London hotel performance continues to outperform most other leading European destinations
- ◆ According to STR Global hotel revenue per available room in London increased by 10% in November compared with October, the first rise for 14 months
- ◆ British Airways carried 3.4% fewer passengers in November than a year earlier; volumes on routes to/from Asia Pacific saw by far the steepest decline, down 23.2%, while the best performing routes were to/from Middle East and Africa

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 in the Enjoy England September Occupancy Survey (please click on link for full report) UK bedspace occupancy in September 2009 was 51%, one percentage point higher than in September 2008. At 69%, room occupancy was the same as the previous year.

For Kent in September 2009, Serviced room occupancy was 5% down compared to September 2008.



National Data on attractions (Source International Passenger Survey)

The most recent International Passenger Survey for October shows that for the year to date overseas visitors to the UK are down by 8%. The origins of visitors and the percentage changes are detailed below:

	OCTOBER		3 MONTHS TO OCTOBER		YEAR-TO-DATE		TWELVE MONTHS TO OCTOBER	
	Visits	% change	Visits	% change	Visits	% change	Visits	% change
	(000)	09/08	(000)	09/08	(000)	09/08	(000)	09/08
North America	290	+1	1,070	+11	3,090	-10	3,470	-13
EU15	1,450	-6	4,610	-10	14,920	-4	17,630	-6
A12	220	-25	720	-23	2,260	-23	2,620	-25
Rest of Europe	140	-11	430	-21	1,460	-15	1,790	-14
Rest of World	350	-10	1,360	+1	3,670	-6	4,170	-8
Total Visits	2,450	-8	8,200	-5	25,420	-8	29,680	-9
	Spend	% change	Spend	% change	Spend	% change	Spend	% change
	(£m)	09/08	(£m)	09/08	(£m)	09/08	(£m)	09/08
Total Spend	1,360	-7	5,000	+3	13,890	-1	16,200	-2

Source: International Passenger Survey, Office for National Statistics

Note that numbers may not sum due to rounding

Notes:

EU15 = Austria, Belgium, Denmark, France, Finland, Germany, Greece, Irish Republic, Italy, Luxembourg, Netherlands, Portugal, Spain and Sweden

A12 = Bulgaria, Cyprus (South of), Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia

Rest of Europe – European countries outside the European Union (includes Russia)

Weather November 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 the wettest November for the UK in a series from 1914, provisionally some 25 mm. Mean temperatures were well above the 1971-2000 normal for November, typically by between 1.5 and 2.5 °C over England and Wales and between 0.5 and 1.5 °C over Scotland and Northern Ireland.

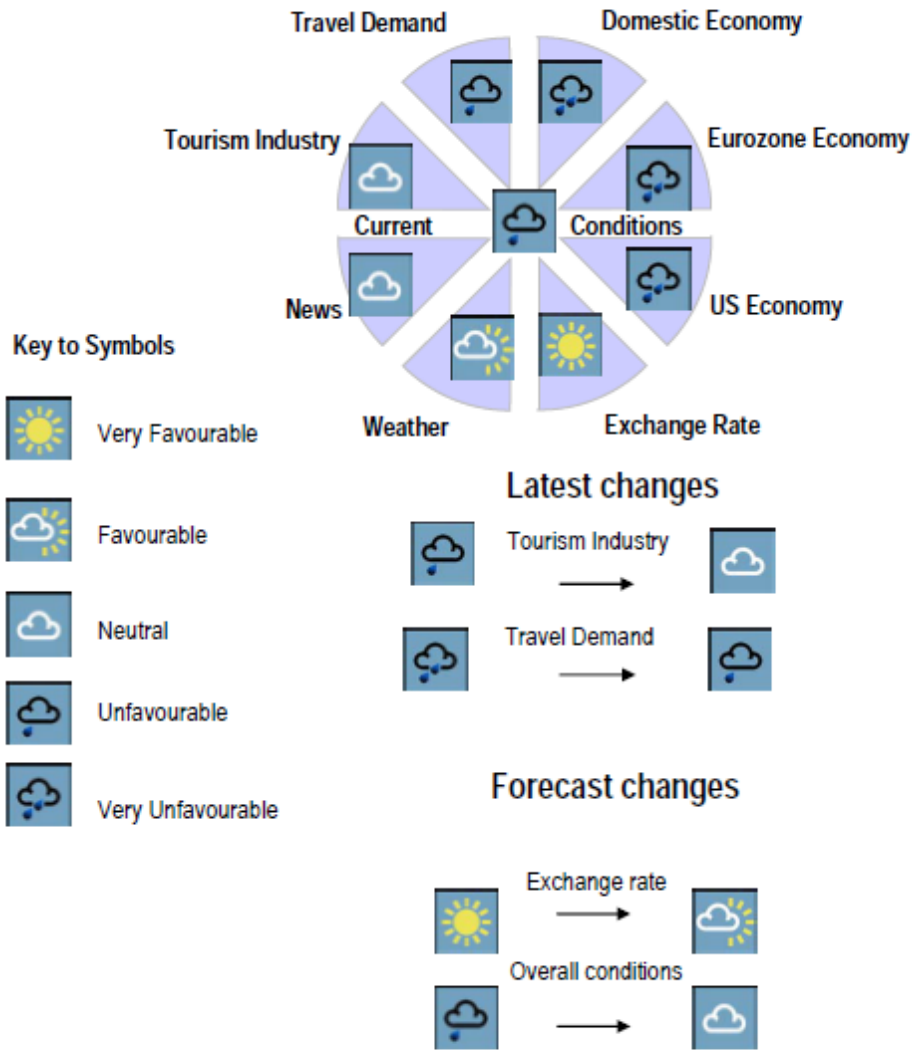
For the UK, provisionally November was the warmest since 2003 and ranks seventh in a series starting in 1914. There were very few days with air frost. Almost all areas recorded well above average rainfall, with many having well over twice the normal amount.”

Visit Kent's Business Barometer

The Business Barometer is a monthly performance snapshot of over 100 Kent tourism businesses



Factors contributing to tourism trends in Britain, November 2009



Source: Visit Britain – Trends Update Issue 117 (26th November 2009)