Visit Kent's Business Barometer October 2009

H e a d l i n e s

An 'Indian Summer' at the end of October meant for many parts of the country, including Kent, the temperature was 5 degrees warmer than average, and little rain. This combined with the half term holidays resulted in another good month for many attractions and TICs. Initial topline results from Visit Kent's Conversion research indicate Visit Kent activities generated more than **£8 million** for the Kent economy.

Comparison October 2008/2009

Kent Attractions Visitor Numbers – Up 14%

In particular, coastal attractions did well this month, buoyed by a few attractions in particular who had excellent results. Paying attractions did better than free attractions.

TIC Visitor Numbers – Up 13%

TICs did well with 9 experiencing a rise in face to face visitors. Rural TICs did best with a 13% rise in footfall, followed closely by Urban TICs at 12% up.

Kent Serviced Accommodation – Down 2%

Room occupancy was down 2%, bed occupancy was the same as last year, but with a higher proportion of UK guests than last year (4%)

Kent Self Catering Unit Occupancy – Down 25%

It should be noted that the 2009 sample was larger than 2008 and so is not directly comparable.

Cross Channel Passengers – Up 1%

Passenger figures remained steady, but the number of cars crossing increased by 10%, and number of coaches decreased by 10%.

Other indicators

- Excellent Weather at the end of the month described by the BBC as almost an Indian Summer
- The latest UK Tourism Survey, from the Office for National Statistics, shows that trips taken by UK residents in England between June and August increased by 22% compared with last year, with the amount spent by travellers up 20%. Domestic holidaymakers were visiting the seaside (up 24% on the same quarter last year), going self catering (up 25%) and going away with children (up 33%), the ONS said. VisitEngland chief executive James Berresford said the figures showed that the 'staycation' had reigned over the course of 2009

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%

Kent Visitor numbers in October

Visitor numbers	2009	2008	% Change
	311,606	273,841	Up 14%

Range of performance amongst attractions overall

Of the 33 attractions reporting in October, 3 attractions did not have comparable years (due to closures), 7 attractions experienced a fall in numbers ranging between 2% and 88%. 2 attractions experienced the same level of visitor numbers as last year, and the remaining 21 attractions were up, ranging from 1% to 113%.

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

Gardens	Historic Buildings	Museums	Outdoor activity	Other
Up 39%	Up 13%	Down 2%	Up 3%	Down 3%

Please note some categories were too small for analysis and so were merged with the 'Other' category this month.

Performance according to attraction location

All areas did well, but in particular the coastal attractions. Three coastal attractions from the coastal sample did particularly well which bumped up the average performance

Coastal	Rural	Urban
Up 57%	Up 3%	Up 10%

Performance according to attraction cost

Charging	Free
Up 15%	Down 4%

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
Down 19%	Up 21%	Up 7%	Up 3%	Down 1%

Factors affecting attraction results

Reasons for positive results were given as the staycation phenomenon, favourable exchange rates, good weather, more awareness of the attraction through publicity, good corporate numbers, more attractive exhibitions, events, season tickets and changes of system, and additional opening hours.

No reasons were given for downturns in visitor numbers except for potentially less interesting exhibitions than previous years.

CARRIERS

These figures are for the combined totals for the Port of Dover and Eurotunnel and show a 10% increase in cars on last year, and a 1% rise in passengers. Coaches on the other hand were down by 10%. In October 2008, channel crossings were affected by the fire in the tunnel.

October	2008	2009	% CHANGE
Passengers	1,477,464	1,492,689	Up 1%
Cars	323,520	355,342	Up 10%
Coaches	10,884	9,815	Down 10%

ACCOMMODATION

Kent serviced accommodation occupancy data

This shows a wide range of results for each District ranging from 38% down to 20% up. With the new data collection system for accommodation starting in January 2010, more explanation of district variance and underlying issues will be possible.

Kent serviced accommodation occupancy data October 2008/9

District serviced accomm.	% room occupancy October 2008	% room occupancy October 2009	% change for month October	Length of stay October 2008	Length of stay October 2009	Change for month October
Ashford	54.3	61.8	7.5	1.4	1.4	No change
Canterbury	64.2	26.5	-37.7	1.7	1.5	-0.2
Dover	60.5	56.5	-4.0	1.4	1.2	-0.2
Maidstone	56.9	62.5	5.6	2.4	2.1	-0.3
Medway	61.9	51.5	-10.4	2.3	1.9	-0.4
Sevenoaks	38.8	44.0	5.2	1.8	1.4	-0.4
Shepway	42.6	50.0	7.4	2.1	1.7	-0.4
Swale	62.8	41.5	-21.3	2.9	1.9	-1.0
Thanet	39.0	47.2	8.2	1.9	No figs	n/a
Tunbridge Wells	47.6	67.1	19.5	1.7	2.1	0.4
Kent overall	54.2	52.0	-2.2	1.9	1.7	-0.2

Kent self catering occupancy data

The self catering sample is small but for 2009 was larger than that for 2008, and so will have influenced the results. Although party size grew by 0.6 people and average stay by 0.6 days, net unit occupancy was down 25%. The UK/overseas split was comparable to last year.

	Ave party size	Ave stay	Net Unit Occ	% UK	% OS
October 2009	3.2	7.5	50.6	63.7	36.3
October 2008	2.6	6.9	75.4	64.0	36.0
% change 08/09	**0.6**	**0.6**	**-24.8**	**-0.3**	**0.3**

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).

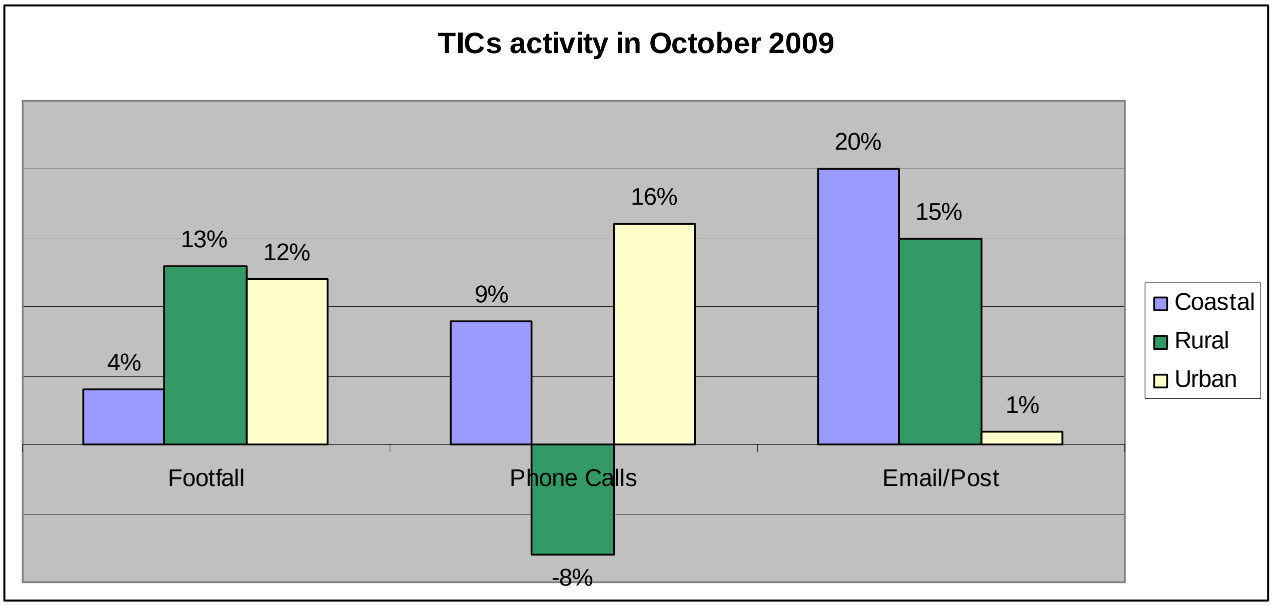
Visitor numbers at Kent TICs – October 2009

Name of TIC	Footfall 09	Footfall 08	% change	Phone 09	Phone 08	Email/Post 09	Email/Post 08
Ashford	1389	976	42	317	364	317	230
Broadstairs	885	654	35	13	34	0	0
Canterbury	38220	27888	37	2230	1399	153	108
DEAL	1449	1743	-17	111	166	64	71
DFH&RM	0	0	N/A	909	652	268	215
DOVER	9940	9616	3	589	684	689	595
Faversham	1492	1353	10	148	0	25	0
Gravesend	2505	2732	-8	286	424	161	189
Maidstone	5860	6634	-12	490	411	35	26
Margate	2569	2497	3	152	210	31	21
Medway VIC	20013	21835	-8	848	996	331	501
Ramsgate	2444	2265	8	67	81	6	1
Royal T. Wells	8089	7610	6	549	460	297	233
Sandwich	2037	1484	37	61	53	8	4
STOP24	1670	0	N/A	0	0	0	0
Tonbridge Castle	503	769	-35	592	656	306	269
TOTALS	**99065**	**88056**	**13%**	**7362**	**6590**	**2691**	**2463**

Factors affecting visitor numbers to the TICs in October 09

Positive factors
Weather
Good publicity of the area
Domestic visitors not going abroad due to weak Pound
People Christmas shopping and buying gifts from us.
Holding talks which bring in more visitors to the centre
Strong Euro
Popular event
More group visits
Negative factors
Economic conditions
Weaker coach numbers

Overall TICs were up by 11%, with footfall being up most in rural and urban areas. Telephone and email/postal contact continue to rise, except for the rural TICs this month where telephone enquiries dropped by 8%.



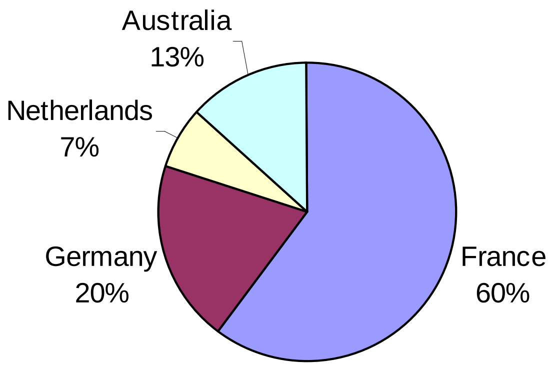
Origin of TIC visitors

The reported overseas visitors to TICs show that in Canterbury and Medway there was a noticeable increase of 25% and 15% respectively in European visitors. This is potentially because of the continuing weakness of the pound against the Euro.

October 2009	% Domestic Visitors	% Long Haul Visitors	% European Visitors	Comparison to October 2008
Ashford TIC	85	2	13	Up 1%
Broadstairs	96.5	0.5	3	No figs
Canterbury	50	10	40	Up 25%
Deal	95	1.5	3.5	Up 3.5%
DFH&RM	96	1	3	No change
Dover	60	5	35	Down 5%
Faversham	93	2	5	No figs
Gravesend	93	4	3	Up 1%
Maidstone	92	7	1	No change
Margate	93	0	7	No figs
Medway	55	10	35	Up 15%
Ramsgate	99.9	0	0.1	No figs
Royal T. Wells	70	10	20	No change
Sandwich	85	5	10	Up 3%
STOP24	0	0	0	No figs
Tonbridge Castle	95	2.5	2.5	No figs

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

Most prominent overseas visitor group



Two TICs reported Australians as their most prominent overseas visitor group this month. French day visitors were the highest group overall, which is often a regular feature at this time of year.

Visit Kent News

Visit Kent Research

Recent Conversion Research in November to identify how well Visit Kent marketing activity encouraged visitors to and around Kent showed that activities such as the website, campaigns and Kent Magazine contributed over £8million to the Kent economy. The full results of the research will be available shortly.

The team are currently contacting accommodation providers in Kent who submit their data to the Business Barometer and transferring them over to the new system. All accommodation data will now be collected direct by Visit Kent, enabling us to give more detailed feedback on issues in the sector through our Business Barometer. Any questions regarding this should be directed to Tracey Parker on 01227 862792, or Alison Hughes on 01227 862782.

Visit Kent Marketing

Visit Kent's London Campaign with Southeastern has resulted so far in 43,000 visits to the website www.visitkentbytrain.co.uk, 4,775 vouchers downloaded, and is fast approaching 7,000 redemptions (from both website and brochure).

The Europe Campaign is still going 'great guns' in the current economic climate! There have been over 61,000 visits to the foreign language websites since June. 30 journalists have been hosted and Euros 628,803 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 Britain Marketplace where over 50 buyers were met with on an individual basis, hosting Liberty Travel on a familiarisation visit and a Sherlock Holmes themed press trip.

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 October comparison 2008/9, visits to the website went up by 81% and page views by 170%.

October 2008	October 2009
90,927	164,849

Visitors to www.visitkentbusiness.co.uk

Visits to the B2B site year to date are 10,788, and page views 34,131. No year on year comparisons can be made until the end of the year when the B2B site will have been in existence for a year.

Other News

Visit Britain Trends Issue 116 (12th November)

- The seven BAA airports handled 1.4% fewer passengers in October than a year earlier, results by market were; domestic -5%, European scheduled +1.1%, North Atlantic -4.8%, other long-haul +4.6%
- In October British Airways carried 2.8% fewer passengers than a year ago; the steepest decline was on routes to/from Asia Pacific whereas travel to/from the Americas improved slightly and to/from Middle East and Africa by a healthier margin

Visit Britain Trends Issue 117 (26th November)

- Latest figures from TRI Hospitality Consulting show that in October London chain hotel occupancy stood at 85.1% (up from 83.6% a year earlier), with regional occupancy at 73.6% (down from 74.5% in October 2008). Room rates fell by less than 5% in London and by 8% in the provinces

National accommodation data - Source: Visit Britain

National data is reported retrospectively as the UK occupancy survey is not available as quickly as our local data. From the overall England figures provided by the UK occupancy survey, serviced bed space occupancy for England in September 2009 was 51%, one percentage point higher than in September 2008. At 69%, room occupancy was the same as the previous year.

National Data on attractions
(Source England Attractions Monitor, Visit Britain)

Quarter 3 of 2009 figures for England are shown in the table below and show nationally attractions were up by 4% in July, 6% in August and 6% in September. Kent compares well as attractions were up 11% in July, 10% in August and 6% in September. Kent benefits from close proximity to Europe where many of the additional visitors have originated from.

Quarter 3 Visit Trends 2008-2009 (July-Sept) – By Attraction Category

Attraction Category	Total Qtr 3 Change (%)	Jul Change (%)	Aug Change (%)	Sept Change (%)
TOTAL ENGLAND (679)	5	4	6	6
Historic Houses/Castles (250)	12	12	16	8
Other historic properties (66)	11	17	18	-4
Museums/art galleries (137)	-2	-2	-4	2
Gardens (50)	11	4	13	18
Visitor/heritage centres (29)	13	6	14	21
Wildlife attractions/zoos (31)	1	-3	2	9
Others (115)	3	1	3	4

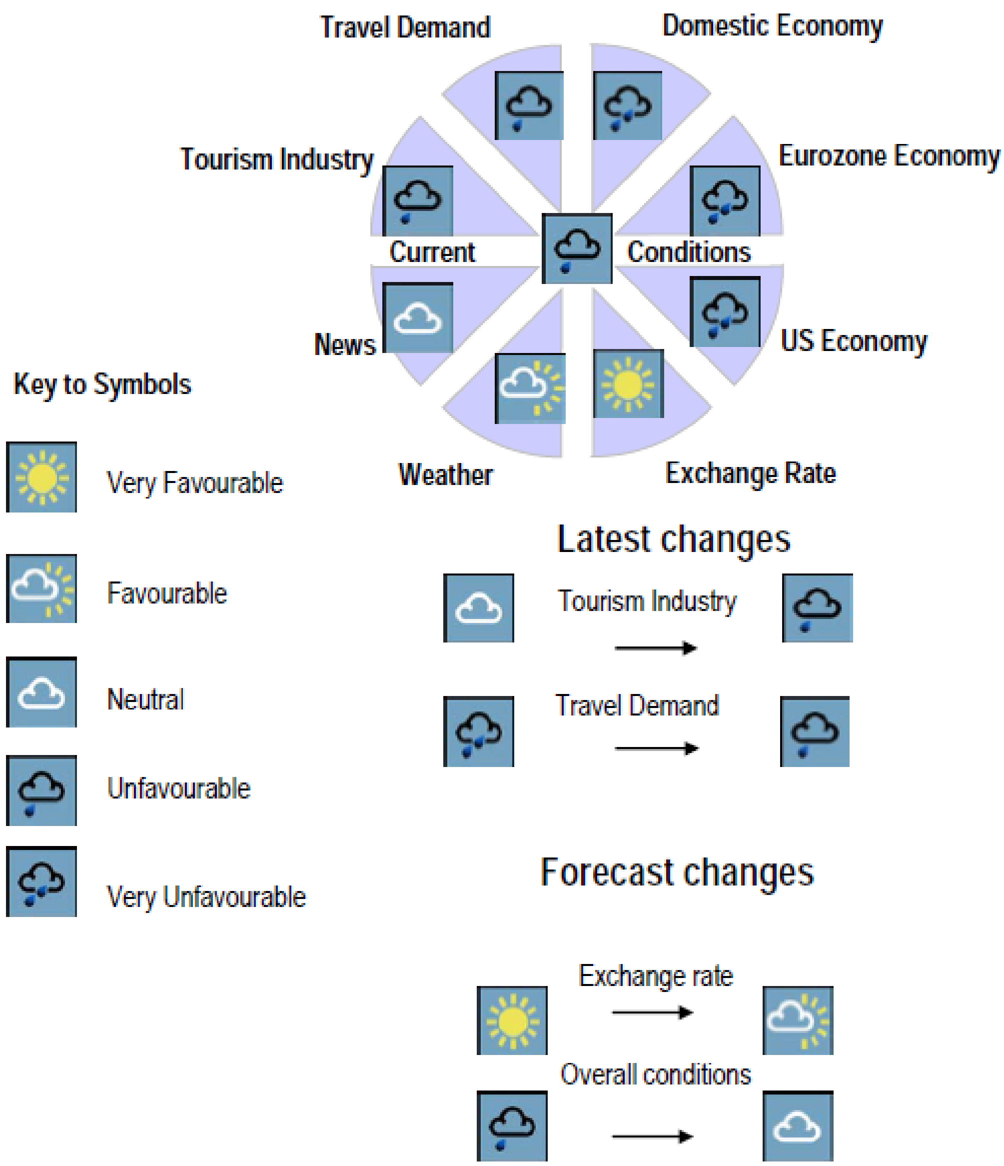
Weather October 2009 (Source www.bbc.co.uk)

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, rainfall was below average in October and it was almost an Indian summer in the last 10 days of the month with temperatures about 5 degrees above normal for this time of year. This combined with half term holidays well timed for the weather resulted in good visitor numbers for the county.

"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, October 2009



Source: Visit Britain – Trends Update Issue 115 (29th October 2009)