September 2009

At the end of the main season, Kent is still experiencing an increase of visitors to attractions of 8% on average compared to 2008. The groups and near continental visitors market remain buoyant. Serviced accommodation is still down on last year, and self catering occupancy also fell this month. Cross Channel figures show a mixed picture* for carriers depending on where their main market is.

Kent Headlines – Comparison September 2008/2009

Kent Attraction Visitor Numbers overall - Up 6%

Rural and Urban attractions did particularly well with rises of 12% and 7% respectively. Coastal attractions saw a fall in visitor numbers of 3%. In the confidence survey, 90% of attractions reported that they had either performed at the same level or better than last year.

Kent Serviced Accommodation Occupancy - Down 5%
Kent Self Catering Unit Occupancy – Down 12%

75% of the accommodation providers, both self catering and serviced, reported in the confidence survey that they had either performed at the same level or better than last year for the year to date. Most of these do not have business tourism bookings, and so have held up with the leisure bookings, but found September to be a poor month for occupancy.

TIC Visitor Numbers – Up 8%

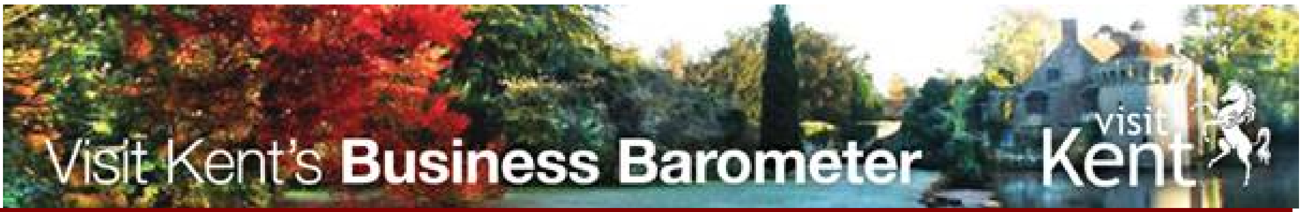
TICs fared well with face to face visitors in the warm and dry weather in Kent in September, but showed a mixed picture for phone and email enquiries.

Cross Channel Passengers - Up 10%*

This hides a mixed picture across the carriers, as the fire in the Channel Tunnel last September affected passenger numbers, and so year on year visitor numbers are not directly comparable.

Other News

- www.visitkent.co.uk saw an increase in visits to the website of 51% and page views by 130%, and page views by 130%.
- Visitors from the USA were more noticeable in the county this month, for attractions and accommodation providers, but French, Dutch and German visitors were still the top three.
- Good weather helped attractions and TICs alike this month with above average temperatures luring residents and visitors out for day trips.
- 36% of attractions reported a rise in coach groups in the third quarter.



ATTRACTIONS

Kent Visitor numbers in September

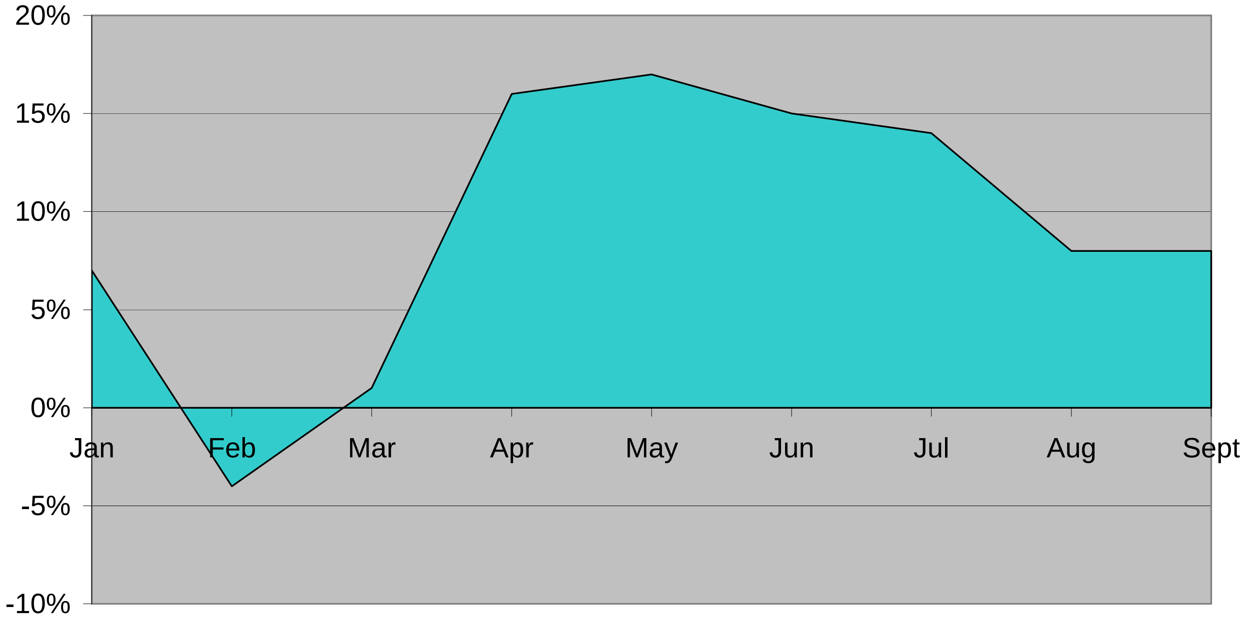
Visitor numbers are up by 6% in September showing a strong finish to the season for many attractions.

Visitor numbers	2009	2008	% Change
	269,014	252,726	Up 6%

Range of performance amongst attractions overall

Of the 36 attractions reporting this month 15 attractions reported a fall in visitor numbers ranging from 3% to 100% down. The remaining 21 attractions reported rises from 1 to 200%.

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



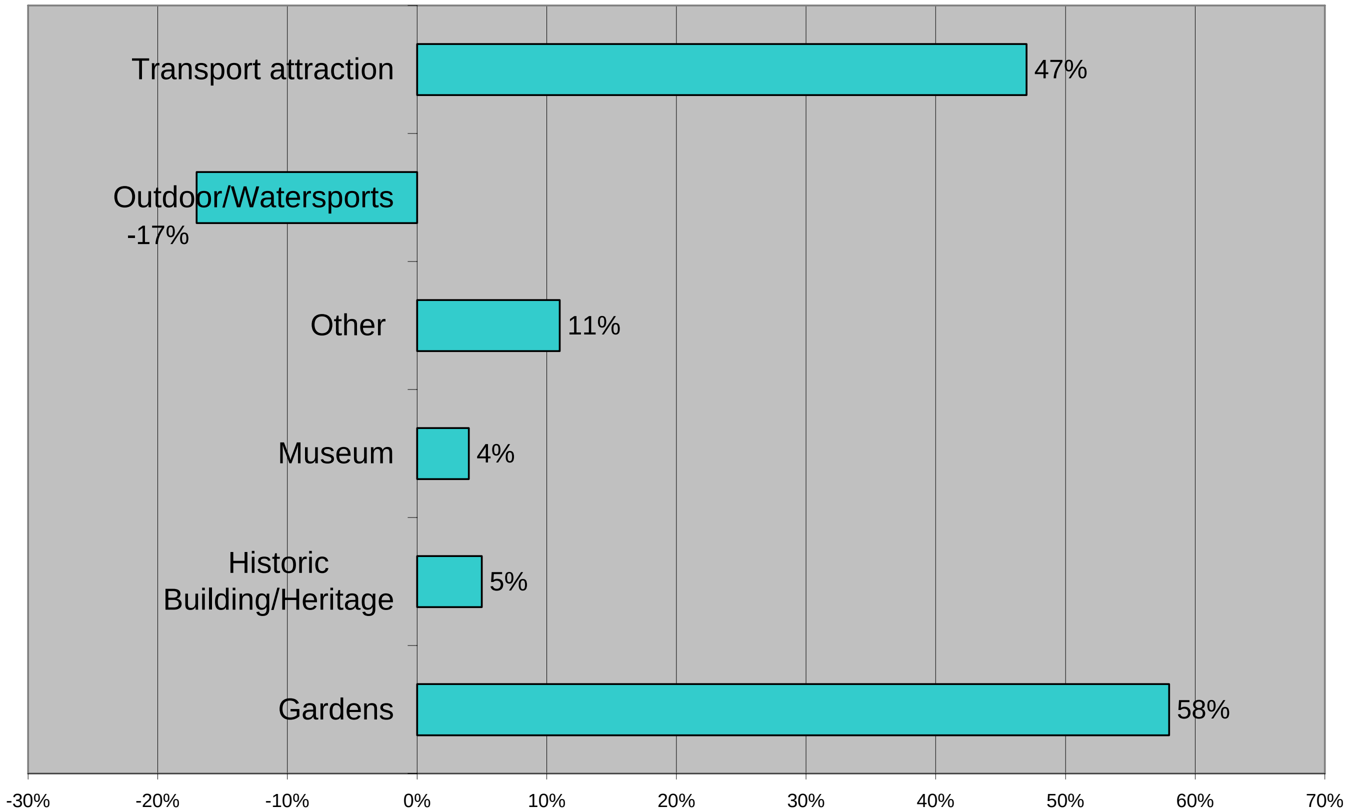
The year to date figures for attractions reporting are shown below and indicate that although the end of the main season was not quite so busy, and 42% of attractions experienced a fall in visitor numbers, overall Kent attractions' visitor numbers are still up by 8% compared to 2008.

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%

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

Gardens and transport attractions did particularly well this month, mainly due to the excellent weather in September



Performance according to attraction location

Rural attractions such as gardens, and city centres have done well in the September sunshine, but coastal attractions and in particular heritage attractions and museums in coastal areas did not have such a good month on average.

Coastal	Rural	Urban
Down 3%	**Up 12%**	**Up 7%**

Performance according to attraction cost

The cost of the attraction is not influencing the visitor in September, with charging attractions experiencing most of the increase in visitors.

Charging	Free
Up 7%	**Down 2%**

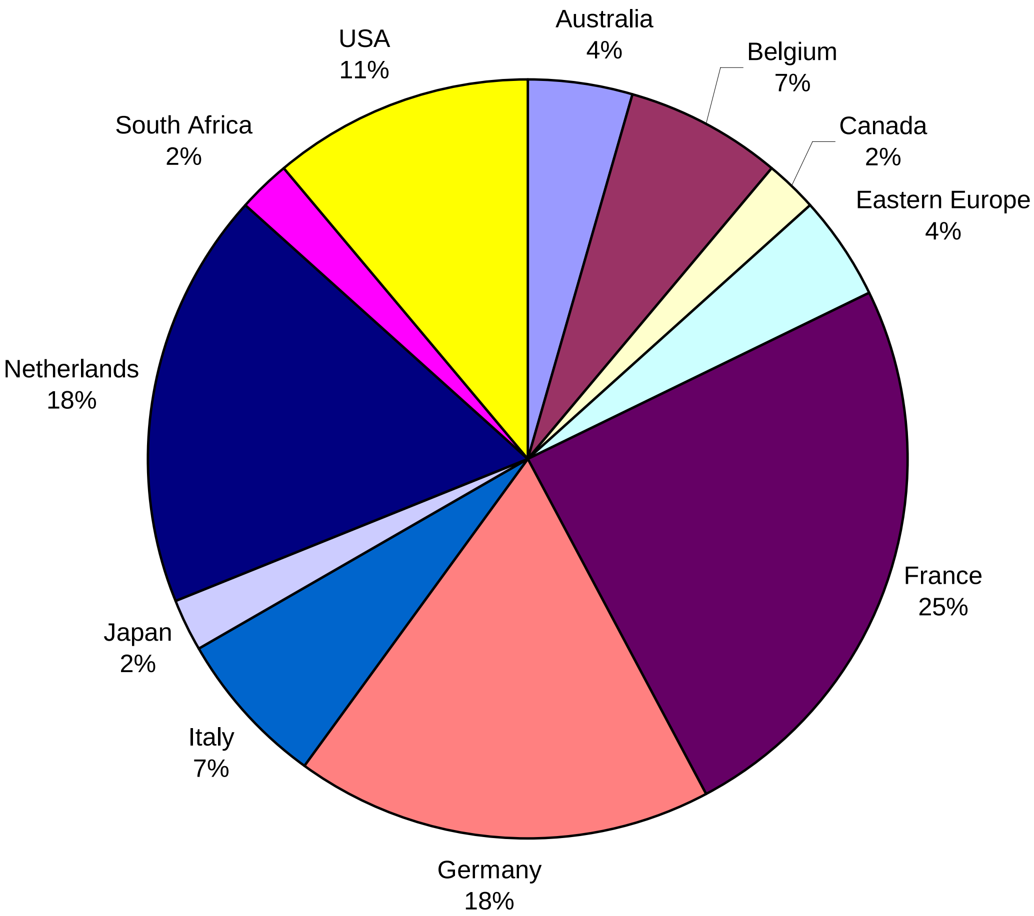
Factors affecting attraction results

The factors affecting the results are quoted word for word where possible but ensuring confidentiality of each attraction.

Positive
Increase in group markets, increase in senior market
Weak pound.
Revised opening times
Two Events
Better weather
Weather, general upwards trend this year continues
Decreased footfall as more Weddings and private dining functions were held in 2009
Increase in general awareness
Strong performance from overseas and continuation of tactical discounting
Better group numbers in 2009. Effect of PR
Events were more successful in 2009
Good weather
Opened for one day more in 2008 than this year.

Negative
Schools going back and overseas visitors dried up
Students return later. Fewer tourists this month than Sept 08.

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



French visitors continued to be the most visible at attractions, with the Netherlands and Germany joint second, and the USA coming in next in fourth place.

CARRIERS

These figures are for the combined totals for the Port of Dover and Eurotunnel and show a 10% increase in passengers on last year overall. September is the anniversary of the fire in the Channel Tunnel, when one tunnel was closed for several months. The service is fully operational this September.

SEPT	2008	2009	% CHANGE
Passengers	957,964	1,065,066	10% up
Cars	245,790	296,973	17% up
Coaches	6,885	7,058	2% up

ACCOMMODATION

Kent serviced accommodation occupancy data

	% room occupancy	% room occupancy	% change		Length of stay	Length of stay	Change
	2008	2009			2008	2009	
Ashford	66.4	74.0	7.6		1.5	1.5	No change
Canterbury	77.0	46.0	- 31		1.8	1.6	-0.2
Dover	71.9	78.0	6.1		1.4	1.4	No change
Maidstone	65.3	64.0	-1.3		2.1	1.9	-0.2
Medway	74.3	45.0	-29.3		2.1	1.9	-0.2
Sevenoaks	too small sample	too small sample	too small sample		too small sample	too small sample	too small sample
Shepway	62.8	66.0	3.2		2.8	2.2	-0.6
Swale	56.3	60.0	3.7		2.1	2.0	-0.1
Thanet	50.9	48.0	-2.9		2.0	No data	n/a
Tunbridge Wells	65.4	79.0	13.6		1.4	1.8	0.4
Kent overall	66.8	62.0	-4.8		1.9	1.8	-0.1

Kent self catering occupancy data

The self catering occupancy data sample from Tourism South East shows a fall in net unit occupancy for the month at 12% with an increase in stay of 1 day, no change in average party size, and an increase in overseas visitors 11%. The sample for September 2009 is equal to September 2008.

	Average Stay	Net unit occupancy	Average Party size	% UK residents	% Overseas residents
Average September 2008	**6.6**	**77.6**	**2.6**	**82.4**	**17.6**
Average September 2009	**7.6**	**65.7**	**2.5**	**71.0**	**29.0**
Change from 08/09	**+1.0**	**-11.9**	**-0.1**	**-11.4**	**+11.4**

Factors affecting accommodation occupancy during September 2009

Positive Factors
Quality
Weather
Wind farm
Businesses seem to have more funds
Good corporate business
Increase in Leisure visitors
More UK residents holidaying in the UK
Workforce in area
Competition closing
More European visitors

Negative Factors
No money for improvements
Cheaper competitors
Cost cutting
Business meetings down
Lack of investment in the town
Economic climate
Swine Flu
Over regulation
People wanting deals
No money for improvements

TOURIST INFORMATION CENTRES

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

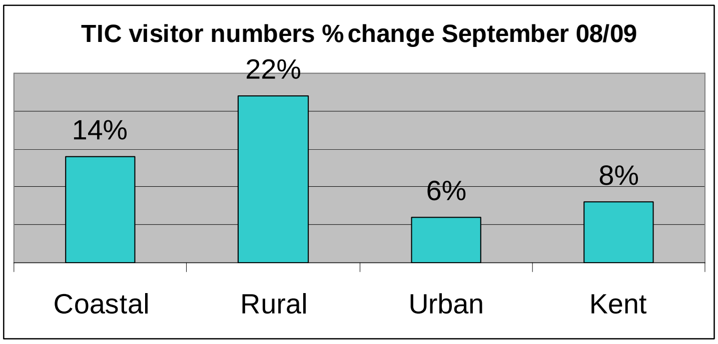
Figures for individual TICs Sept 08/09

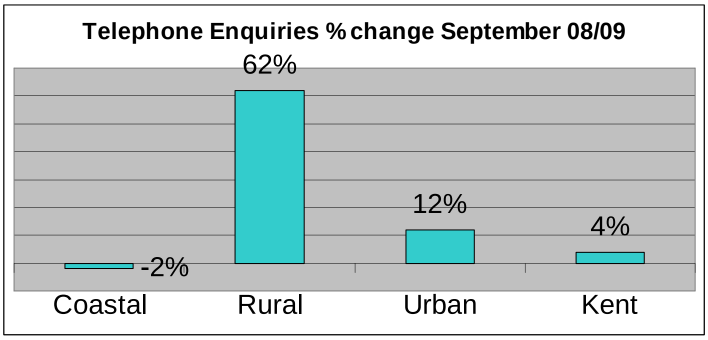
Name of TIC	Footfall Sept 09	Footfall Sept 08	% change	Phone calls Sept 09	Phone calls Sept 08	% change	Postal & email Sept 09	Postal & email Sept 08	% change
Ashford	1554	1255	24	421	430	-2	305	234	30
Broadstairs	1830	1473	24	48	49	-2	0	0	0
Canterbury	36358	34288	6	1298	488	166	137	111	23
Deal	1749	1547	13	166	127	31	72	97	-26
DFH&RM	0	0	0	909	756	20	268	202	33
Dover	13171	11954	10	1988	2401	-17	694	912	-24
Faversham	2249	1795	25	142	0	0	35	0	0
Gravesend	4135	3952	5	340	406	-16	273	229	19
Maidstone	6041	6675	-9	538	409	32	42	43	-2
Margate	4980	4041	23	286	278	3	17	85	-80
Medway	24498	22326	10	648	936	-31	738	892	-17
Ramsgate	3871	3658	6	191	189	1	16	43	-63
Royal T Wells	10420	9250	13	493	570	-14	287	218	32
Sandwich	3183	2609	22	97	60	62	16	12	33
STOP24	1081	0	0	0	0	0	0	0	0
Tonbridge	1859	2192	-15	559	584	-4	898	359	150

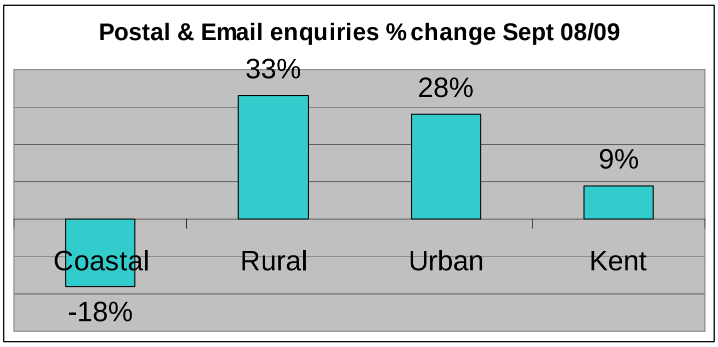
Factors affecting visitor numbers to the TICs in Sept 09

Couples with children are here now that schools have restarted - higher spend in shops and restaurants
Cruise Business
Economic conditions
Excellent weather
New and additional events, or different timing of events
No longer offering general Council services is causing a slight decrease in Visitor numbers
Our talks programme has begun, therefore we have extra visitors to the centre who come and listen to talks at our TIC twice a month until April.
Strong Euro
Swine Flu - we have had cancellations

TICs experienced a good month generally for face to face visits, but a mixed month for telephone contact and postal/email enquiries







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 many cases the TICs have had a considerable influx of additional European visitors in September.

September 2009	% Domestic Visitors	% Long Haul Visitors	% European Visitors	Comparison to September 2008
Ashford	84	4	12	1% more European visitors
Broadstairs	99	0.05	0.95	No data for September 2008
Canterbury	30	20	50	35% more European visitors
Deal	80	5	15	No data for September 2008
DFH&RM	95	1	4	2% more European visitors
DOVER	52	26	22	No change
Faversham	95	1.5	3.5	5.5% less European visitors
Gravesend	93	5	2	3% less European visitors
Maidstone	97	1	2	No change
Margate	99	0.4	0.6	No data for September 2008
Medway	60	5	35	20% more European visitors
Ramsgate	98.5	0.5	1	No data for September 2008
Royal T Wells	50	10	40	5% more European visitors
Sandwich	85	5	10	4% less European visitors
STOP24	0	0	0	No data for September 2008

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

Attractions Confidence for the 3rd quarter 2009

For attractions it has been on average a good year so far. Attractions were asked how their business has performed since the start of 2009 compared to the same period in 2008. The responses were:

Much better	**35%**
Better	**19%**
Slightly better	**13%**
About the same	**23%**
Slightly worse	**10%**
Worse	**0%**
Much worse	**0%**

Top three concerns for Kent attractions overall in September
UK Economic Climate
Strength of the pound
The Weather

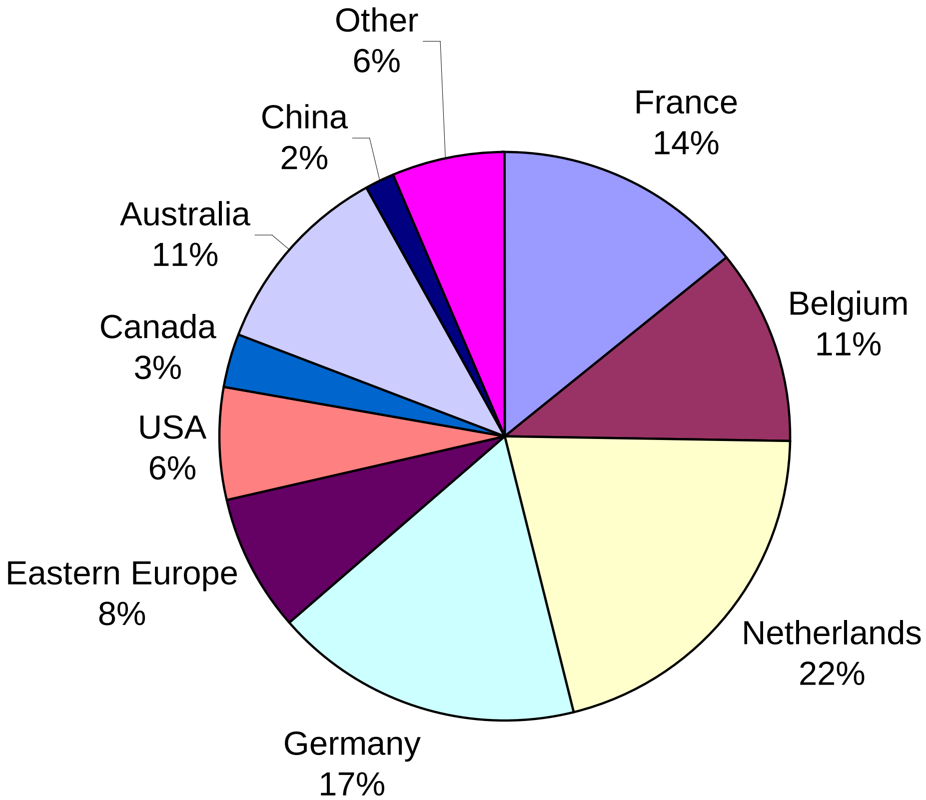
Accommodation Confidence Survey for the third quarter 2009

Accommodation providers were less confident about the year with 25% having a less successful year than last year. However, in this economic climate it is reassuring to see that 75% either performed at the same level or better than last year. Many of the sample are not involved in business tourism and so this may make the picture seem more positive.

Much better	**13%**
Better	**6%**
Slightly better	**19%**
About the same	**37%**
Slightly worse	**19%**
Worse	**6%**
Much worse	**0%**

Top three concerns for Kent accommodation overall in September
UK Economic Climate
Poor Transport
Competition/Strength of pound/Over regulation

Nationality of overseas staying visitors



Coach market to attractions

The coach market to attractions was faring well in the second quarter compared to the first quarter with 42% remaining the same as last year, or 39% reporting a rise. For the third quarter, the picture is slightly less optimistic than the second, but 36% were still reporting a rise in coach visitors.

Coach market 1st Quarter January to March 2009

	Coach Market Up	Coach Market Same	Coach Market Down
Overall	22%	39%	39%

Coach Market 2nd quarter April to June 2009

	Coach Market Up	Coach Market Same	Coach Market Down
Overall	39%	42%	19%

Coach Market 3rd quarter July to Sept 2009

	Coach Market Up	Coach Market Same	Coach Market Down
Overall	36%	42%	22%

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

Visit Kent News

Visit Kent Research

The Visit Kent research team is taking over the accommodation data collection from Tourism South East (TSE) with effect from 1st January 2010 and will from then on make direct contact with Kent providers. All providers already involved in the system will receive an email or letter from Tourism South East confirming the change of system, and their details will be transferred to Visit Kent by the end of the year. All new contributors are welcome, please contact Tracey Parker on 01227 862792 or tracey.parker@visitkent.co.uk.

Visit Kent Marketing

Visit Kent's London Campaign with Southeastern has resulted so far in 38,000 visits to the website www.visitkentbytrain.co.uk, 4,076 vouchers downloaded, and 5,595 redeemed (from both website and brochure).

The Europe Campaign is still going 'great guns' in the current economic climate! There have been over 55,548 visits to the foreign language websites since June, 28 journalists have been hosted and Euros 628,803 spend on 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 are taking place, but these include a group of 10 US journalists who visited Kent on a familiarisation trip organised in partnership with the Coach Tourism Council. The new USA website www.visitkent.us is due to launch imminently.

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 September comparison 2008/9, visits to the website went up by 51% and page views by 130%.

Visitors to www.visitkent.co.uk

Sept 2008	Sept 2009
104,584	158,180

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

Weather

• Met Office figures show that across the UK September brought average amounts of sunshine, above average temperatures and exceptionally below average amounts of rainfall

Visit Britain Trends Update

- The UN World Tourism Organisation report that international tourism declined by 7% in the first seven months of 2009
- Halfords reports better than expected profits which it says is in part down to growth in sales of camping equipment to those looking for value for money holiday options
- Global Refund report that in August sales to inbound visitors who reclaimed tax on departure from the UK were up by 77% compared with a year ago
- According to PKF hotel occupancy in regional hotels in August stood at 72.4%, down from 74.8% a year earlier, with occupancy in London hotels at 81.8%, down from 83.7% in August 2008; room rates fell 8% in the regions and by 7% in London in the year to August
- According to American Express business class air fares are set to rise by 15% in 2010 due to reduced capacity and higher ancillary costs for airlines

UK Tourism Survey – June 2009

The survey, available on www.enjoyengland.com, shows that June 2009 was similar to June 2008, with no real change in visitor numbers. There is a clear split between the situation for holiday and business visitors, with a 14% rise on the year to date of holiday visitors to the UK and England, but a 9% and 8% fall in business visitors respectively.

Purpose of Trip – Year to Date (January – June 2009)

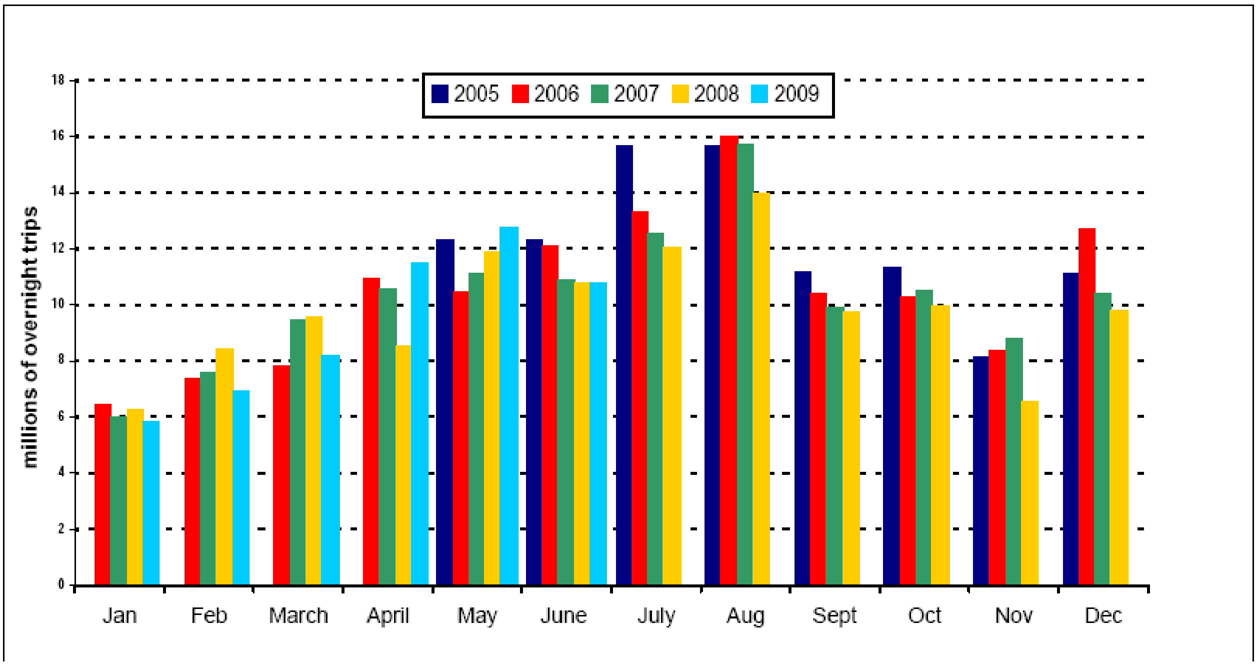
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2008	2009	% +/-	2008	2009	% +/-	2008	2009	% +/-
UK									
Holiday	22.7	26.0	+14%	77.8	87.9	+13%	4944	5178	+5%
Business	9.8	8.9	-9%	23.1	21.9	-5%	2436	2302	-5%
VFR	21.0	19.8	-6%	61.1	52.6	-14%	2246	2048	-9%
England									
Holiday	17.8	20.4	+14%	58.8	67.9	+16%	3821	4004	+5%
Business	8.2	7.5	-8%	19.2	18.0	-6%	1972	1861	-6%
VFR	17.8	17.1	-4%	51.4	44.3	-14%	1802	1708	-5%

Outbound Travel – UK Residents

	TRIPS (MILLIONS)			SPEND (£BN)		
	2008	2009	% +/-	2008	2009	% +/-
June 2009	6.9	5.8	-16%	3.6	2.7	-25%
Jan – June 2009	32.9	27.4	-17%	17.1	14.1	-18%
July 08 – June 09	70.9	63.5	-10%	36.4	33.8	-7%

TREND CHARTS

UK All Trips – Domestic Trip Volume by Month



National Data on attractions (Source International Passenger Survey)

The most recent International Passenger Survey for August shows an 8% fall in incoming visitors for incoming visitors, but an impressive 22% increase in US visitors.

	AUGUST		3 MONTHS TO AUGUST		YEAR-TO-DATE		TWELVE MONTHS TO AUGUST	
	Visits	% change	Visits	% change	Visits	% change	Visits	% change
	(000)	09/08	(000)	09/08	(000)	09/08	(000)	09/08
North America	460	22	1,270	-4	2,490	-13	3,450	-18
EU15	1,730	-9	4,960	-3	12,040	-5	17,700	-6
A12	240	-36	750	-17	1,770	-25	2,710	-22
Rest of Europe	160	-30	490	-12	1,150	-18	1,790	-16
Rest of World	570	7	1,550	1	2,890	-7	4,200	-9
Total Visits	3,160	-8	9,030	-4	20,380	-9	29,890	-10
	Spend	% change	Spend	% change	Spend	% change	Spend	% change
	(£m)	09/08	(£m)	09/08	(£m)	09/08	(£m)	09/08
Total Spend	2,050	8	4,150	2	10,930	-1	16,205	-2

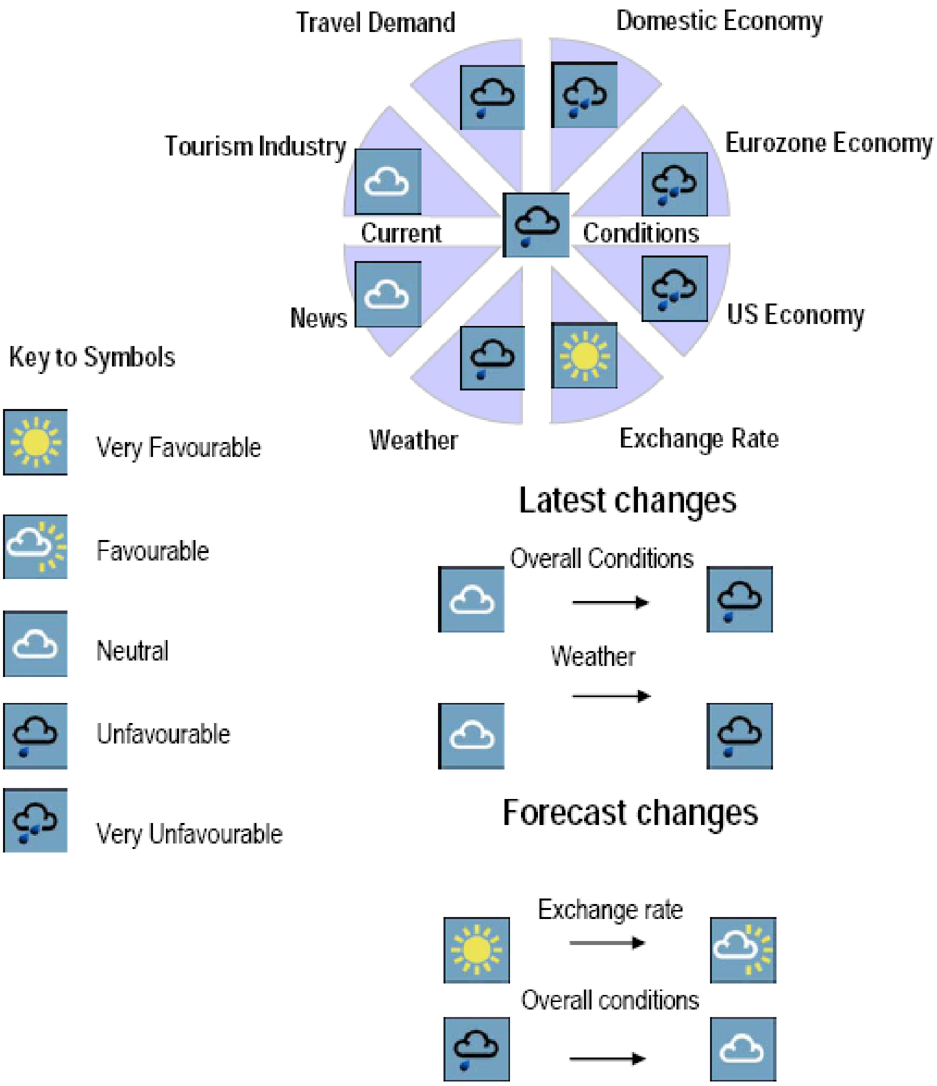
Source: International Passenger Survey, Office for National Statistics

National accommodation data - Source: Visit Britain

The figures below relate to serviced occupancy in July.

- UK bedspace occupancy in July 2009 was 55%, one percentage point higher than in July 2008. At 68%, room occupancy was 2 percentage points lower than in July 2008.
- When compared with July 2008, occupancy levels in seaside and country/village locations rose (by 4 percentage points in the latter). In small town locations, bedspace occupancy also rose but room occupancy fell (by 3 percentage points), while in city/large town locations both room and bedspace occupancy fell (by 5 and 3 percentage points respectively)
- The Kent serviced room occupancy figures for July 2009 were 7% down on July 2008, and so for this month, Kent was considerably worse off than the national average. However, the sample for Kent is not as large and therefore not as reliable as the greater sample that Visit Britain uses for this report.

Factors contributing to tourism trends in Britain, September 2009



Source Trends Update – Issue 112 (18 September 2009)

If you have any questions about the Barometer, or wish to contribute, please contact Tracey Parker on 01227 862792 or tracey.parker@visitkent.co.uk.