

## Visit Kent's Business Barometer April 2011

April was a month of good weather, and a positive 'feel good' effect around special events such as the Royal Wedding and the associated bank holiday. Many UK residents took advantage of this and arranged for extended holidays following on from the Easter holiday weekend. April was a big month for Kent with Turner Contemporary opening its doors to the public.

### Comparison April 2010/11

Attraction visitor numbers	Up 5%
TIC Footfall	No change
Cross Channel Passengers	Down 7%
Serviced Accommodation which includes the smaller B&B and guest houses. Source: <a href="http://www.ribos.co.uk/kent">www.ribos.co.uk/kent</a>	Up 11%
Serviced Accommodation Larger Hotel Accommodation Occupancy for April Source 2011 STR Global Ltd	Down 2.5%

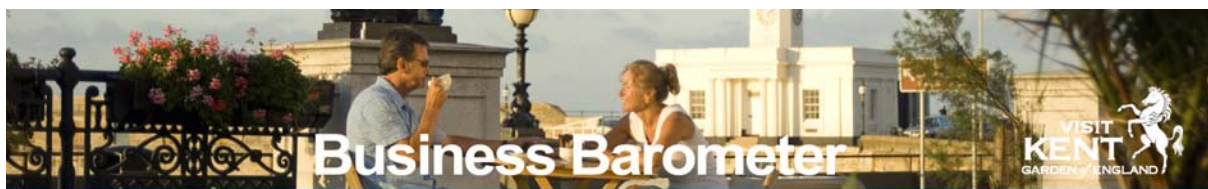
### Other news

- Attractions benefited from the excellent weather combined with the Easter holiday and Royal Wedding Bank Holiday weekend. Visitor numbers are 4% up on last year for the year to date.
- 54% of attractions felt that 2011 was a better year so far for their business than 2010.
- Channel crossings were down by 7% compared to last year, but this is due to the additional crossings laid on last year for those affected by the ash cloud.
- For the first time TICs have reported no change in footfall between 2010 and 2011, however this hides a very broad range of results and factors. Thanet's footfall rose by 80% for instance due to the interest in Turner Contemporary.
- Larger serviced accommodation was down 2.9% for the year to date.
- Smaller serviced accommodation was up by 11% with fine weather and some last minute bookings.
- Visits to the consumer website were up by 9%, with page views up by 60%. The business website visits were up by 47%, and page views by 11%.

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## Attractions

### Kent visitor numbers in April 2011

Visitor numbers	2011	2010	% change
	506,681	481,349	Up 5%

### Visitor numbers for the year to date

Visitor numbers for the year to date were 4% up on 2010.

	2010	2011	% change for month	Year to date Totals 2010	Year to date Totals 2011	% change for year to date
January	51,133	60,682	Up 18%	51,133	60,682	Up 18%
February	91,277	106,118	Up 16%	142,410	166,800	Up 17%
March	223,400	210,009	Down 6%	365,810	376,809	Up 3%
April	481,349	506,681	Up 5%	847,159	883,490	Up 4%

### Range of performance amongst attractions overall

23 attractions reported a rise in visitor numbers compared to April 2010 ranging from 2% up to 81% up. 1 attraction remained the same as last year. 10 attractions reported a fall in visitor numbers ranging from -5% to -31%.

### Performance according to cost % change April 10/11

Charging	Free
Up 7%	Down 22%

### Performance according to location, % change April 10/11

Coastal	Rural	Urban
Down 7%	Up 9%	Up 7%

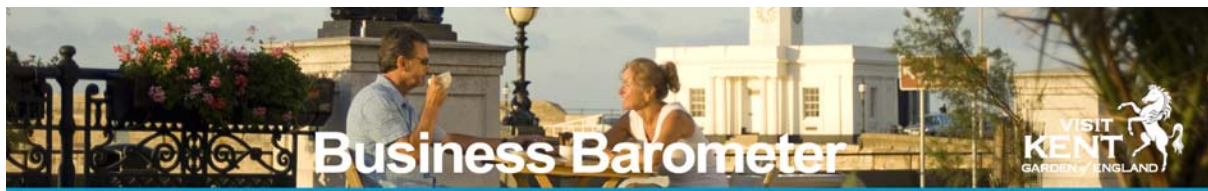
### Performance according to attraction type, % change April 10/11

Gardens	Museum	Historic Building Heritage Attraction	Other
Up 37%	Up 13%	Up 3%	Up 5%

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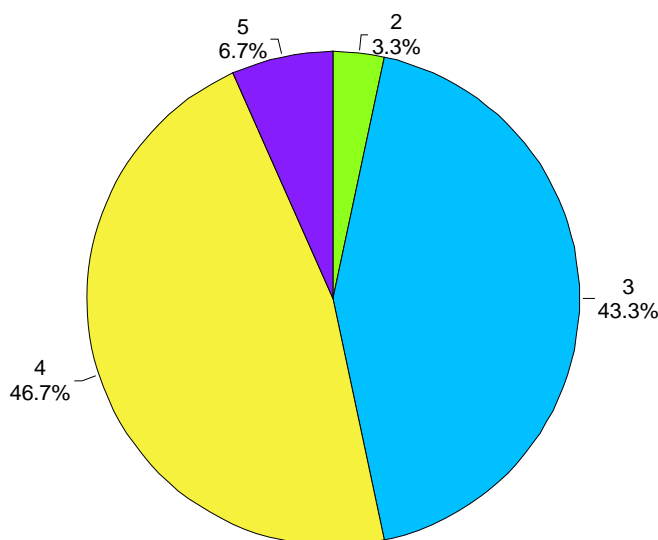




### Performance overall so far this year

47% of attractions felt that 2011 was better than 2010 so far, and 7% much better. 43% felt it was about the same, and 3% that it was not as good as last year.

1 = Much worse than expected, 5 = Much better than expected



### Performance according to size, % change April 2010/11

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 4%	Up 10%	Up 24%	Down 9%	Up 3%

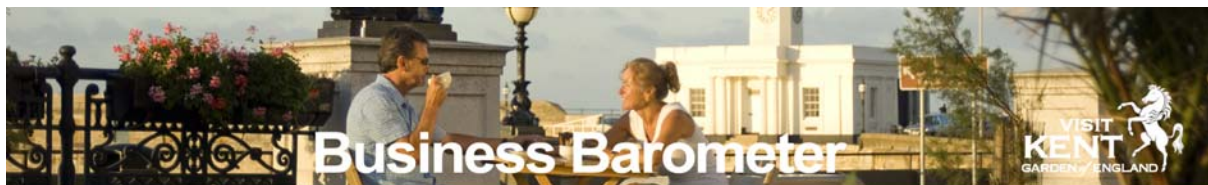
### Factors affecting visitor attraction results

Negative factors
Closed for bank holidays. Good weather meant people stayed outside!
Competition from other attractions
Economic conditions - we discounted to maintain admission numbers
High cost of fuel
Lack of volunteers to open museum
Less Group Bookings due to having more Bank Holidays
People more likely to visit on a special offer or make more use of their season ticket.
Royal Wedding
Shortage of volunteers to open museum
Sundays are a lot poorer in general, probably 40% down on average
Take up for Easter event lower than usual. Competition from other attractions

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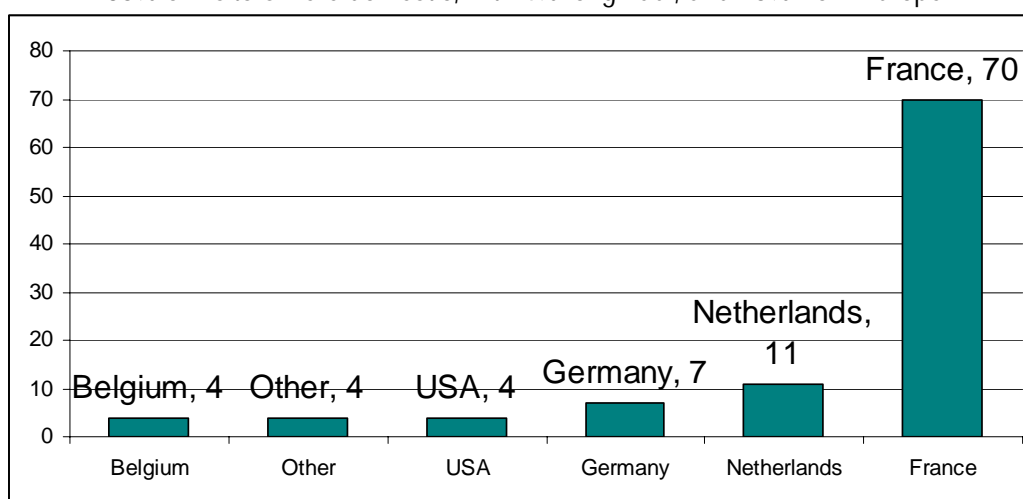


### Positive factors

Good school visits and general visitors up
Due to good weather and comparison with weak April in 2010
First time in my management that we did not lose a day to adverse weather
New extension
Good weather and strong educational visits.
Good weather attracting many people to the Castle Gardens.
High membership visits
Lovely weather over Easter - busiest Easter Saturday and Easter Monday ever!
More of the Festival was in April last year (4 extra days and these days attract our highest visitor numbers)
New extension open this year
Quality of exhibition & promotion of it
There has been a notable increase in numbers, particularly over the Easter weekend (double the number of visitors). Reasons would include the number of bank holidays in April, the good weather and the continued interest in local produce and the trend for 'staycations'.
Very good weather. Easter and Royal Wedding bank holidays
With the help of Visit Kent we have raised our profile both in London and Europe over the last two years and I am noticing more international interest. The weather has been kinder that last year during the Easter holidays
Yes, Easter fell in April only this year and weather was great.
Yes. Very good weather during the Easter break significantly boosted numbers. Bear in mind that these are visitor numbers to the Visitor Centre - open only at weekends and Bank Holidays. The country park is open 24/7 so weekday visitors are not routinely recorded.

### Top countries of origin of overseas visitors in April (%)

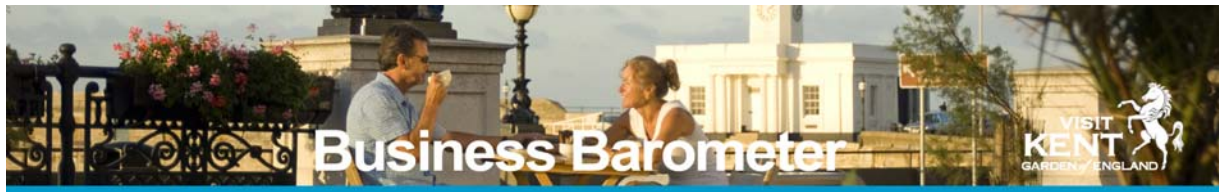
The majority of overseas visitors came from France this month, many for day visits in the good weather. 83% of visitors were domestic, with 4% long haul, and 13% from Europe



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## Cross Channel Carriers

These figures are the combined totals for the Port of Dover and Eurotunnel and show the impact of the ash cloud last year on figures. Crossings for passengers and coaches are lower this year than last year due to a return to more 'normal' crossing levels for the month.

### Cross channel crossings

April	2011	2010	% CHANGE
Passengers	1,393,809	1,503,601	Down 7%
Cars	333,659	342,989	Down 3%
Coaches	10,981	13,165	Down 17%

## Tourist Information Centres (TICs)

### TICs Comparison April 2010/11

Name of TIC	Footfall 2011	Footfall 2010	% change	Phone Calls 2011	Phone Calls 2010	Emails 2011	Emails 2010
Ashford	1045	1274	-18	207	318	357	388
Canterbury	32743	33058	-1	981	2000	137	133
Deal	1770	1968	-10	110	120	248	224
DFH&RM	0	0	n/a	1014	987	375	347
Dover	10357	9803	6	1833	1674	949	1066
Faversham	1935	1142	69	119	98	72	47
Gravesend	2479	2641	-6	268	318	303	410
Maidstone	6297	6918	-9	407	602	27	47
Medway	26348	23974	10	619	752	242	308
Royal T Wells	3084	8987	-66	463	474	262	305
Sandwich	2589	2842	-9	108	91	55	43
Thanet *	8331	4640	80	292	238	93	87
Tonbridge	1942	1445	34	742	569	0	0
	<b>98920</b>	<b>98692</b>	0	<b>7163</b>	<b>8241</b>	<b>3120</b>	<b>3405</b>

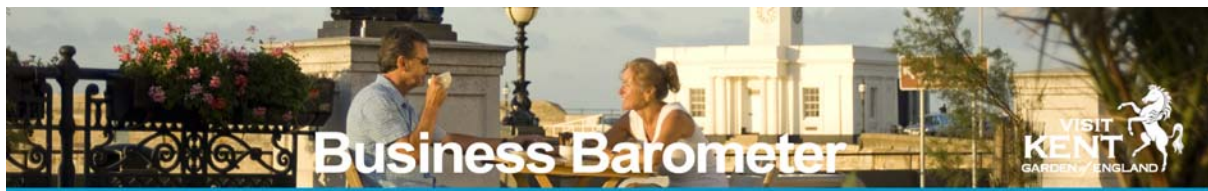
Please note that TICs are subject to a number of changes in the current economic environment and so at this time it is difficult to make comparisons. This table just serves as a notification of visitor numbers year on year, but does not take into account any changes in location, staffing levels, or opening hours. \* The rise across the board for Thanet TIC can be attributed to the opening of the Turner Contemporary.

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### Nationality of TIC visitors

Name of TIC	Domestic	Long Haul	European	Euro visitors compared to April 2010
Ashford	75	5	20	Up 11%
Canterbury	50	5	45	Down 5%
Deal	90	0.25	9.75	Up 5.75%
DFH&RM	80	5	15	Up 5%
Dover	50	15	35	Down 10%
Faversham	92	2	6	No change
Gravesend	93	3	4	Up 1%
Maidstone	98	0.5	1.5	No change
Medway	60	5	35	Up 5%
Royal T Wells	80	4	16	Down 6%
Sandwich	85	4	11	Up 1%
Thanet	98.25	1	0.75	Up 0.15%
Tonbridge	95	2	3	No change

### Top countries of origin of Overseas TIC Visitors in April (%)

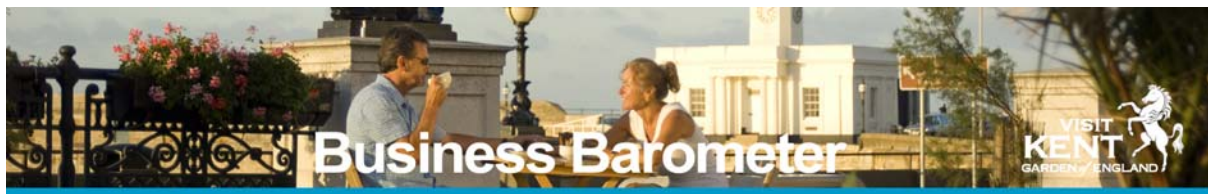
Overall, 80% of footfall was from domestic visitors, 4% long haul, and 16% from Europe. Two TICs noticed an increase in Danish visitors this month, but overall 61% were from France, 23% from the Netherlands, and 8% German/8% Eastern European

## Accommodation

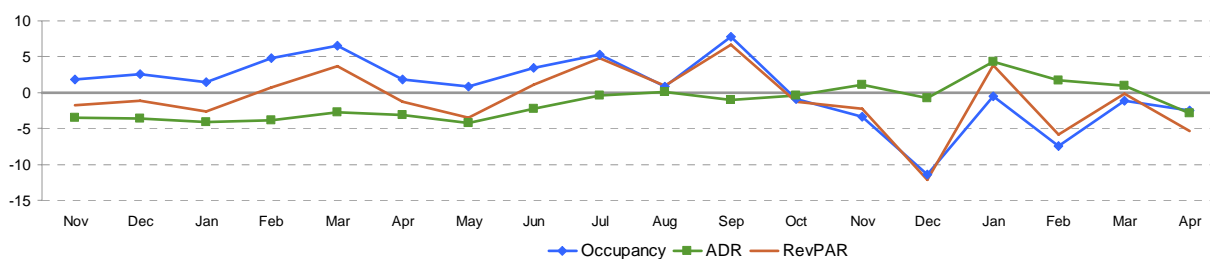
### Larger hotel serviced accommodation

According to STR Global, room occupancy in April for the larger and chain hotels was down by 2.5% with a year to date fall of 2.9%.

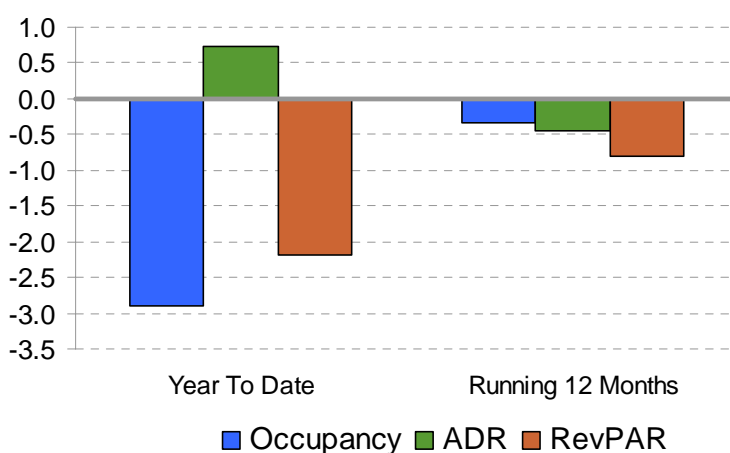
Occupancy (%)	2011			
	Jan	Feb	Mar	Apr
This Year	49.2	59.9	59.1	68.0
Last Year	49.4	64.7	59.8	69.7
Percent Change	-0.5	-7.4	-1.1	-2.5



Monthly Percent Change



Overall Percent Change



### Smaller hotels, guest houses and B&B's

Smaller serviced accommodation occupancy in April 2011 was very positive with an 11% increase on the previous year. The excellent weather may have attracted short break visitors to the county at the last moment as some reported a rise in last minute bookings.

Year on year % occupancy comparison Kent

Kent Occupancy	April 2008	April 2009	April 2010	April 2011
	51.8	54.3	48.3	59.2

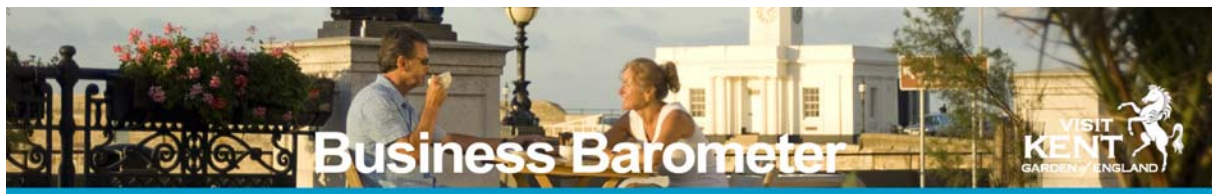
% Occupancy according to location

Location	Occupancy
Countryside/village	53.5
Seaside	58.3
Large town/city	65.6
Small town	55.5

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### % Occupancy according to business type

Location	Average Occupancy
Bed and Breakfast	47.4%
Guest House	56.9%
Hotel/Inn	71.0%

## Visit Kent News

### Visit Kent Research update

The Visit Kent Research Team held a very successful Research Forum in the Village Hotel in Maidstone Kent on May 12th under the SusTRIP (Sustainable Tourism Research and Intelligence Partnership). The forum was funded by Europe under the Two Seas Interreg Programme and brought together experts from all four partner areas. The topic of the forum was 'Measuring Tourism Performance in the Two Seas Region'

The Business Barometer processes in Kent, Nord Pas de Calais, Flanders, and Zeeland were compared, and best practice shared. Guests were invited from other parts of the UK tourism industry through British Destinations contacts. The conference will help each of the SusTRIP partners to develop their Barometers with Kent leading as a Best Practice example.

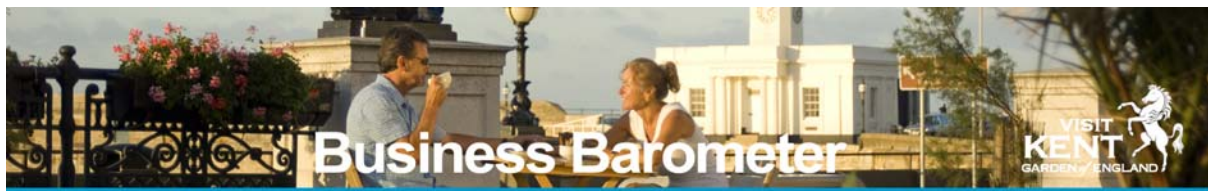


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## Ahead of the Games - your guide to preparing for London 2012

Advice is still available from the organisers of the 2012 Olympic Games about planning for the Olympic Games. Click on the link below for full details and the guide:

<http://www.tourism2012games.org/ahead-of-the-games.aspx>

### Visit Kent Websites

Consumer website [www.visitkent.co.uk](http://www.visitkent.co.uk).

Visits to the consumer site were up by 8.72%, with page views also up by an impressive 59.81%. This would seem to indicate that visitors to the site are exploring the site in more detail looking for information.

April 2009 unique visits	April 2010 unique visits	April 2011 unique visits
135,975	170,725	185,613

B2B website [www.visitkentbusiness.co.uk](http://www.visitkentbusiness.co.uk)

Visits to the B2B site were up by 47.36% with page views up by 11.47%

April 2009 unique visits	April 2010 unique visits	April 2011 Unique visits
1,121	1,193	1,758

### Visit Kent Marketing

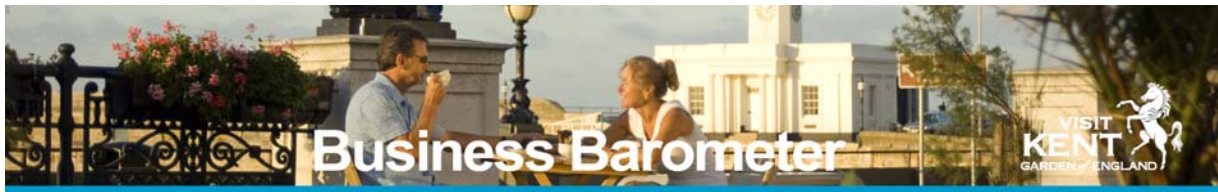
April marked the start of the new financial year and our exciting marketing plan for the year. Kent will be advertised on high profile poster sites throughout London during June and supporting activity will continue though to September prompting visits to Kent with 2FOR1 offers. The campaign will be promoted across the Southeastern network and through the Stagecoach and Arriva bus routes. There will also be some exciting promotions in partnership with Shepherd Neame and Ashford Designer Outlet. In April we launched our "Summer of Culture" campaign to help promote the wealth of cultural venues and events across the county this summer – check out [www.visitkent.co.uk/summerofculture](http://www.visitkent.co.uk/summerofculture)

We continue to welcome a large number of European journalists to the county, all of whom are hosted to an exceptionally high standard by our investors which results in some great press coverage in high quality publications. Our website hits remain high and our social networking activity is allowing us to reach new audiences with up to the minute events information and special offers. Are you one of our Facebook fans or a follower on Twitter?

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## Other News

Additional and unusual factors affected the visitor economy in April. The Royal Wedding in particular meant extended holiday breaks for many around the Easter holiday, an additional Bank Holiday, and 'feel good' factor. Following on from extended good weather, April was a very positive month for tourism.



### BBC Weather for April:

According to the BBC, The average UK temperature was 3.7 °C above normal meaning it was the warmest April on record since 1910. In central England, it was the warmest April for over 350 years. Maximum temperatures were well above average, by as much as 6 °C in south-east England. With areas of high pressure over or near to the UK for much of the month, there was plenty of fine, warm weather. Easter Saturday (23rd) saw temperatures peak around 27 °C in south-east England - the highest in April since 1949.

### Trend Updates (152 & 153 Visit Britain)

TRI Hospitality Consulting figures show that in April London chain hotel occupancy stood at 79.9%, up from 75.3% a year ago, while in the provinces occupancy stood at 66.9% up from 66.3%

In April BAA's six airports handled 31.1% more passengers than a year before, however the ash cloud of last April and changes in the number of bank holidays during April this year make meaningful comparisons difficult. However, both Heathrow and Edinburgh had their busiest April on record

### Activities undertaken by overseas visitors in the South East region in 2010.

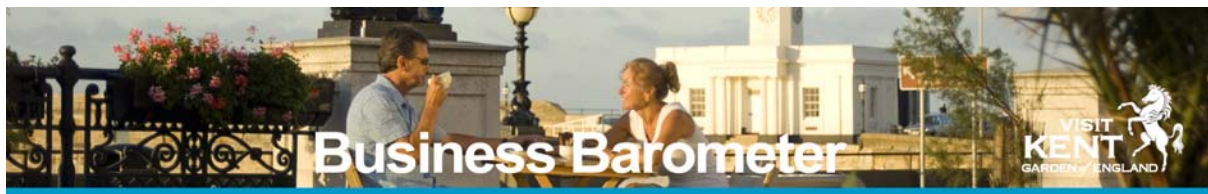
Visit Britain analyses the data from the International Passenger Survey to identify the activities that visitors from overseas undertake in the locality they visit. The activities undertaken in 2010 are below, but a full report can be found on the link below.

[http://www.visitbritain.org/Images/Activities%20by%20Area%20of%20the%20UK\\_tcm29-14612.pdf](http://www.visitbritain.org/Images/Activities%20by%20Area%20of%20the%20UK_tcm29-14612.pdf)

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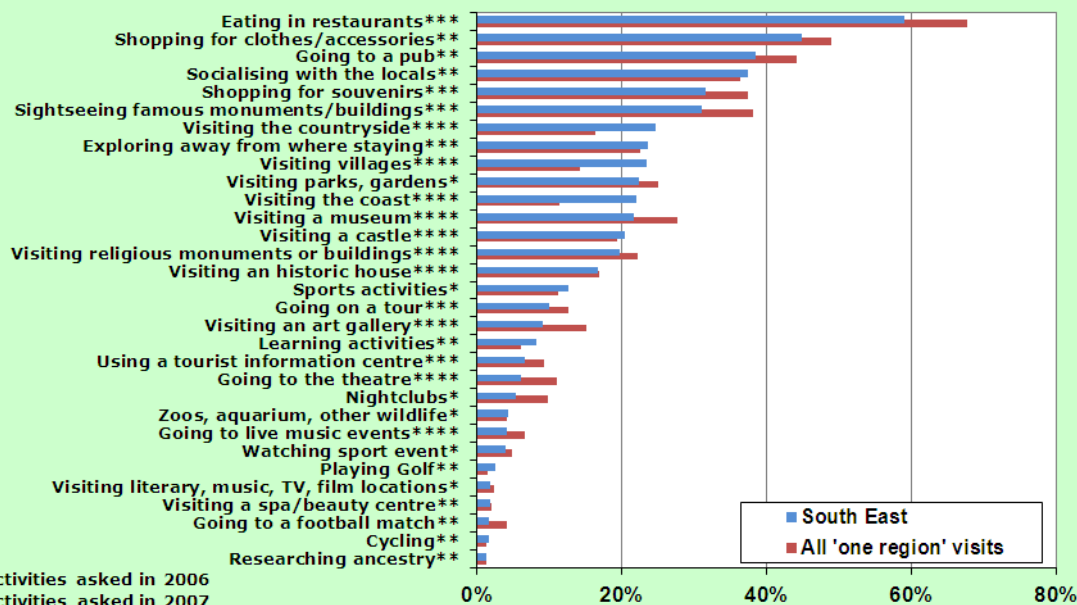
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## South East

### Activities undertaken during visit in 2006 - 2009



\*Activities asked in 2006  
 \*\*Activities asked in 2007  
 \*\*\*Activities asked in 2008  
 \*\*\*\*Activities asked in 2009

### England Occupancy Survey

The occupancy survey for March for England is now available online at the Visit England site. Please click on the link below:

[http://www.visitengland.org/Images/March%202011%20Final%20Graphs%20for%20EOS%20Reporting%20excluding%20regional\\_tcm30-26387.pdf](http://www.visitengland.org/Images/March%202011%20Final%20Graphs%20for%20EOS%20Reporting%20excluding%20regional_tcm30-26387.pdf)

### England Attractions' Monitor

The national picture for attractions for the first quarter of 2011 is available from Visit England on the link below:

[http://www.visitengland.org/Images/2011%20Q1%20Report%20v1\\_tcm30-26353.pdf](http://www.visitengland.org/Images/2011%20Q1%20Report%20v1_tcm30-26353.pdf)

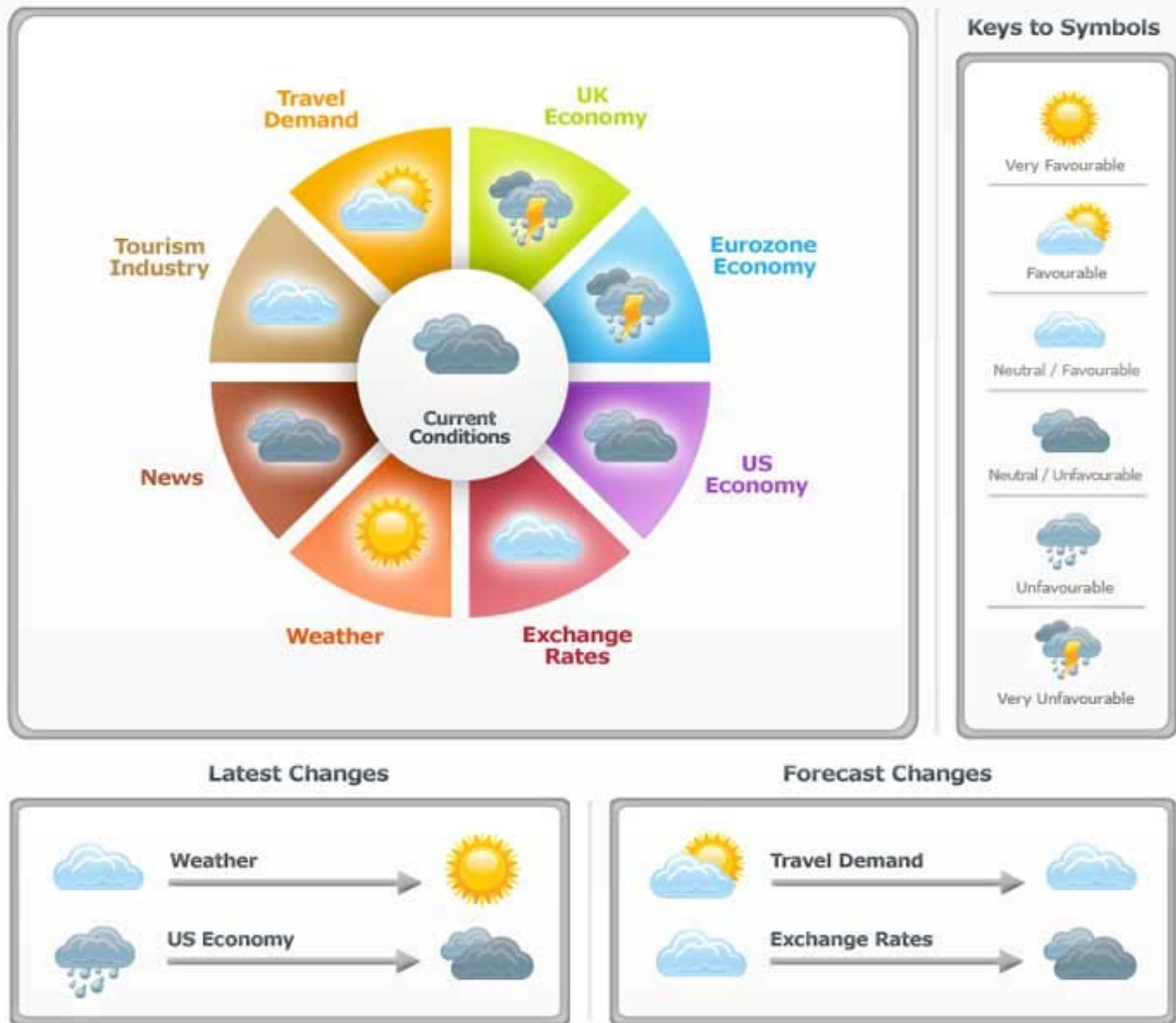
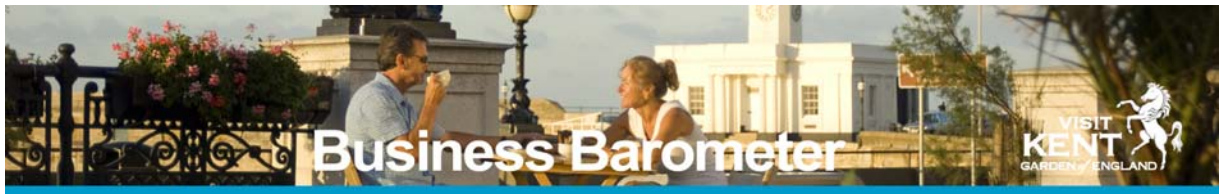
### Business Barometer Contact changes:

Alison Hughes will be moving on from her role as Research and Admin Assistant to a new role within the office as Admin Coordinator. Thank you to Alison for all her help over the last few years on the Business Barometer which has been invaluable to its development. We would like to welcome Kelly Sharp who starts on 20<sup>th</sup> June as the new Research and Development Assistant and can be contacted after that date on [kelly.sharp@visitkent.co.uk](mailto:kelly.sharp@visitkent.co.uk).

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If you would like to be part of the Business Barometer process, or have any comments on its content, please contact Tracey Parker, Research Manager [tracey.parker@visitkent.co.uk](mailto:tracey.parker@visitkent.co.uk) 01227 812905. All Barometers for the last 6 years are found on [www.visitkentbusiness.co.uk](http://www.visitkentbusiness.co.uk) under the Research and Development section of the site.