



Visit Kent's Business Barometer August 2011

August was disappointing for weather during the main school holiday weeks with attractions reporting a fall of 3.5% in visitor numbers. However, conference and event venues were still experiencing a positive rise in the number of conferences and events compared to last year, with weddings increasing by 2%. Falls in other types of event shows hesitancy by the public to spend due to more constrained budgets.

Comparison August 2010/11

Attraction visitor numbers	Down 3.5%
Conference Venues	Up 11%
VIC Footfall	Down 4%
Serviced Accommodation which includes the independent and smaller hotels, B&Bs and guest houses. Source: www.ribos.co.uk/kent	Up 1.3%
Serviced Accommodation Larger Hotel Accommodation Occupancy for August Source 2011 STR Global Ltd	Down 2.1%

Other news

- The consumer website visits grew again in August by 33% with page views up by 43%.
- Larger hotel and chain occupancy for the year to date was down by 1.5%.
- Attraction visitor numbers were up 2% for the year to date.
- Accommodation providers are most confident and positive about the Olympics next year as they have received bookings or enquiries for the event. Attractions are neither positive nor negative and at this stage very few have planned Olympic linked events. VICs have received a few enquiries.
- Conference and event venues reported a rise in conferences and weddings but a fall in other types of events linked to tightening of budgets.

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Attractions

Kent visitor numbers in August 2011

Visitor numbers	2011	2010	% change
	432,334	447,791	Down 3.5%

Visitor numbers for the year to date

	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%
May	427,498	442,723	Up 4%	1,274,657	1,326,213	Up 4%
June	314,509	302,358	Down 4%	1,589,166	1,628,571	Up 2.5%
July	456,465	483,457	Up 6%	2,045,631	2,112,028	Up 3.2%
August	447,791	432,334	Down 3.5%	2,493,422	2,544,362	Up 2%

Range of performance amongst attractions overall

14 attractions' visitor numbers were up ranging from 3% to 68%. 5 attractions were the same as last year, and 16 attractions were down ranging from -1% to -35%

Performance according to location, % change Aug 10/11

Coastal	Rural	Urban
Down 7%	Down 2%	No change

Performance according to attraction type, % change Aug 10/11

Museum	Gardens	Tour or Transport attraction	Historic Building/ Heritage Attraction	Other
Down 2%	Up 10%	Down 3%	Up 1%	Down 16%

Performance overall so far this year

- 7% of attractions say performance has been much better this year
- 50% better
- 23% about the same
- 20% worse
- 0% much worse

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Performance according to cost, % change Aug 10/11

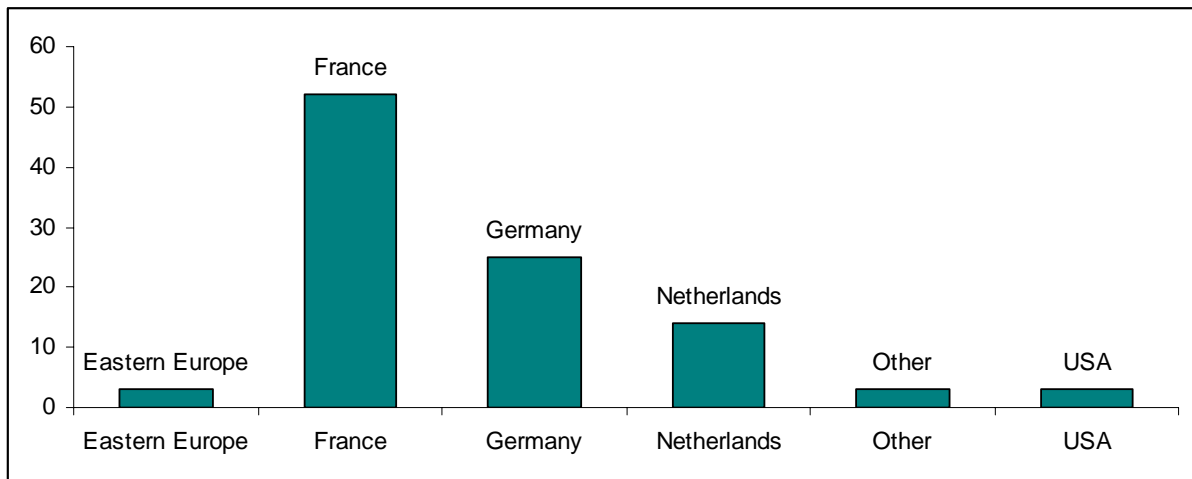
Charging	Free
No change	Down 25%

Performance according to size, % change August 10/11

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 8%	Down 3%	Down 3%	Down 10%	Down 3%

Top countries of origin of overseas visitors in August (%)

81.5% of visitors were domestic, with 3.5% coming from long haul destinations such as the USA and Asia, and 15% from Europe.



Factors affecting visitor attraction results

Negative factors
Lack of volunteers
Fuel prices
Poor weather
Economic situation
Lack of media interest
Coldest Summer on record since 1993. People have less money to spend. Smaller marketing budget.
Cost of fuel
Global economy
Ancillary spend poor, weather not particularly good during month, general doom and gloom on economy in media.
We are slightly down – due to less Marketing budget, worse weather for summer and people having less money to spend.
Poor August weather
Lack of volunteers

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Positive factors
Continued interest in local produce. More people holidaying at home/in the country
Looks strangely similar, had to double check that I was looking at two different years
Increase in visitors, summer children's event every Monday and Tuesday in August.
Aggressive price promotion.
TV advert and good weather
Summer events at property throughout August
Additional Weddings and extra marketing for tours
Fewer group bookings and other special hires
There was a five week August in 2010 and a four week in August 2011
Well attended special event
Successful mediaeval event and growth in general visitors to the destination.
After-effects of Open Golf Tournament
New visitor exhibition and reception
Reasonable weather for the bank holiday weekend
Exhibition
Summer holiday activities, 12 month ticket and popular temporary exhibition
New attractions open for Summer

Visitor Information Centres (VICs)

VICs Comparison August 2010/11

Name of VIC	Footfall 2011	Footfall 2010	% change	Phone Calls 2011	Phone Calls 2010	Emails 2011	Emails 2010
Ashford	993	1981	-50	175	731	229	307
Canterbury	43113	47401	-9	1025	1088	306	135
Deal	2409	2673	-10	142	196	275	155
DFHRM	75	0	n/a	906	1106	470	443
Dover	20815	21571	-4	2566	2973	1077	1461
Faversham	2098	1588	32	133	101	73	91
Gravesend	3103	3134	-1	249	244	410	265
Maidstone	9178	6885	33	574	636	26	31
Medway	25619	28558	-10	460	530	232	290
Royal T Wells	7591	11134	-32	712	871	278	297
Sandwich	4181	4270	-2	140	157	27	24
Thanet	11887	6169	93	261	725	112	57
Tonbridge	1582	2264	-30	721	640	0	0
Kent	132644	137628	-4	8064	9998	3515	3556

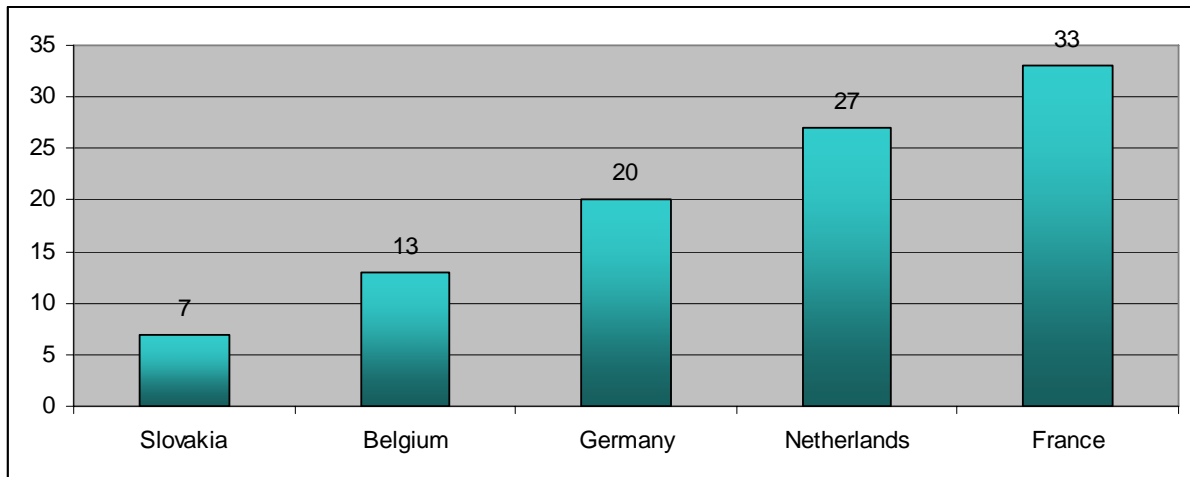
Please note that VICs are subject to a number of changes in the current economic environment and so at this time it is difficult to make comparisons. This table just serves as a notification of visitor numbers year on year, but does not take into account any changes in location, staffing levels, or opening hours.



Nationality of VIC visitors

Name of VIC	Domestic	Long Haul	European	Euro visitors compared to August 2010
Ashford	85	2	13	Down 12%
Canterbury	12	3	85	Up 35%
Deal	87	1	12	Down 3%
DFHRM	77	3	20	Up 10%
Dover	50	15	35	Remained same
Faversham	92	3	5	Down 1%
Gravesend	89	8	3	Up 1%
Maidstone	99	0	1	Down 0.5%
Medway	55	5	40	Up 5%
Royal T Wells	60	10	30	Down 5%
Sandwich	81	3	16	Up 4%
Thanet	99	0.1	0.9	Down 0.35%
Tonbridge	90	4	6	No figures

Top countries of origin of Overseas VIC Visitors in August (%)



Accommodation

Larger hotel serviced accommodation

Overall percentage change

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
This year	51.1	63.9	63.5	68.8	73.9	80.5	86.4	83.9
Last year	50.0	66.3	64.2	71.5	77.4	81.0	86.0	85.7
% change	2.2	-3.7	-1.1	-3.8	-4.4	-0.5	0.4	-2.1

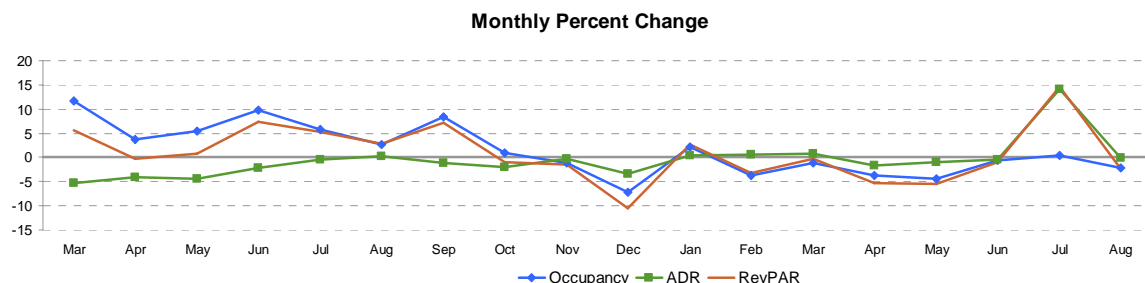
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After the boom of RevPAR and ADR around the Golf Open, these returned to a comparable level to 2010. Occupancy fell by 2.1%.



Smaller hotels, guest houses and B&Bs

Occupancy was up by 1.3% amongst the independent hotels and guest house/B&B style properties.

Year on year % occupancy comparison Kent

Kent Occupancy	August 2009	August 2010	August 2011
	60.38	72.22	73.55

% Occupancy according to location

Location	2009	2010	2011
Seaside	55.62	70.72	73.42
Large town/city	66.90	75.86	81.42
Small town	68.88	71.17	56.93
Countryside/village	65.26	68.84	70.37

% Occupancy according to business type

Location	2009	2010	2011
Bed and Breakfast	43.41	66.15	69.25
Guest House	66.78	71.97	75.96
Hotel/Inn	71.30	78.34	76.71

Conference and Event

Conferences were up by 11% in August compared to 2010 with weddings up by 2%, but other types of events down by 24%. This would seem to indicate that mainly landmark or vital business events are taking place rather than less vital leisure ones with these being more restricted in these times of tighter budgets. Some reported that bookings had been made but that subsequently they had been cancelled with 'tightening of budgets' given as the reason for cancellation.

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Average length of conferences held

Length of conference	Half a day	1 day	2 days	3 days +
% of conferences held	52%	38%	3%	7%

The average tariff ranges of venues participating

Tariff range	% of venues within this range
£18 to £25	54%
£26 to £30	8%
£31 to £40	23%
£41 to £50	8%
£51 or more	8%

Origin of conference delegates

Kent	London	UK	Overseas
65%	13%	21%	1%

Visit Kent News

Visit Kent Research update

2012

Visit Kent has produced its own guide to businesses in the lead up to the Olympics. This can be found on our B2B website under <http://www.visitkentbusiness.co.uk/index/business-advice/London-2012/>

Businesses were asked if they had any enquiries or bookings in connection with the Olympics and their responses are below:

	Yes lots of bookings	Yes some bookings	No bookings or enquiries	Yes lots of enquiries	Yes some enquiries
Conference and event venues	8%	31%	46%	0%	15%
Attractions	3%	50%	27%	0%	20%
Accommodation*	5%	43%	2.5%	2.5%	2.5%
Visitor Information Centres	0%	8%	46%	8%	39%

* please note that the accommodation providers did not all respond to the question and so the total does not add up to 100% of respondents.



We also asked businesses how positive they were feeling about the Olympics and their responses are below:

	Very positive	Quite positive	Neither positive nor negative	Quite negative	Very negative
Conference and event venues	15%	15%	69%	0%	0%
Attractions	10%	30%	60%	0%	0%
Accommodation*	5%	40%	7%	2.5%	2.5%
Visitor Information Centres	31%	39%	31%	0%	0%

* please note that the accommodation providers did not all respond to the question and so the total does not add up to 100% of respondents.

Visit Kent Websites

Consumer website www.visitkent.co.uk.

The consumer website visits rose by 33% this August, with page views up by 43%.

August 2009 visits	August 2010 visits	August 2011 visits
185,490	209,228	279,070

B2B website www.visitkentbusiness.co.uk

The B2B site visits fell by 16% with page views down by 24%

August 2009 unique visits	August 2010 unique visits	August 2011 unique visits
1,542	1,449	1,222

Visit Kent Marketing

August marked the launch of the summer 2FOR1 campaign in partnership with Southeastern, Stagecoach and Arriva. A wide range of Kent attractions and accommodation suppliers have provided fantastic 2FOR1 offers to encourage visitors to travel to and around Kent's venues by public transport. The campaign has been promoted across the transport networks, through a dedicated brochure and a significant online campaign. We have welcomed journalists from two different publications in the Netherlands and we are well underway with the commission of our new consumer website (due for launch in January 2012).

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Other News

BBC Weather

- The weather was predominantly unsettled and cool during August, with areas of low pressure over or close to the UK for most of the month.
- It was the coolest August since 1993 across Scotland and Northern Ireland, but similar to August 2010 across England and Wales.
- The rainfall pattern was highly variable, with over twice the average amount in the eastern half of Scotland and in north-east England and about 150% of average across central southern England.
- A maximum temperature of 30.3 °C was recorded at Gravesend (Kent) on the 3rd.

England Occupancy Survey – July results now available

http://www.visitengland.org/Images/July%202011%20Final%20Graphs%20for%20EOS%20Reporting%20excluding%20regional_tcm30-27945.pdf

UK Occupancy – June results now available

http://www.visitengland.org/Images/junsum11_tcm30-28024.pdf

Accommodation – Business Confidence Monitor

Visit England has issued its 'Wave 4' research for the summer holidays for 2011, measuring the level of confidence in accommodation. The headlines from the report are:

Reasonable visitor numbers

- 1.1 The tourism industry in England has had a reasonable summer holiday period, with about a third (32%) of businesses reporting increased visitors and two in five (40%) reporting the same level as last summer.
- 1.2 The hotel and caravan sectors have performed the best in terms of visitor numbers, as has been the case through the research waves this year. Over a third (37%) of businesses in each of these two sectors report increased visitors.
- 1.3 Visitor numbers are not as positive as this time last year however, when about two in five (38%) businesses increased their visitor numbers on the summer before.

High satisfaction during challenging times

- 1.4 Satisfaction with performance this summer is generally high, with about a third (34%) of operators saying they are 'very satisfied' with performance, and just under half (45%) saying they are 'quite satisfied'. Operators seem to accept that economic circumstances are still very difficult and are generally content to match last year's visitor numbers.

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1.5 Satisfaction is not as high as this time last year however, when about two in five (41%) operators were 'very satisfied' with performance.

Advance bookings slightly down but confidence is high

1.6 About one in four (26%) businesses are up on advance bookings for the autumn for this time of year, and more than two in five (44%) are level. Three in ten (30%) are down. However, last minute bookings are so commonplace now that it is difficult for operators to predict how the next period will be based on advance bookings alone.

1.7 Over a quarter (28%) of operators maintain they are 'very confident' for the autumn and just over half (53%) say they are 'fairly confident'.

Riots impacted negatively on businesses in London

1.8 About one in five (18%) businesses in London have experienced 'significant' negative impact on visitor numbers by the recent riots, and a similar proportion (21%) report 'some' negative impact.

1.9 Most (88%) London operators however believe there will be no ongoing impact over the coming months. The sample size for London is quite small (34) so the figures need to be treated with a degree of caution.

1.10 Outside of London the riots have had a negligible impact on the tourism industry.

The full report is available here:

http://www.visitengland.org/Images/REPORT%20VisitEngland%20Business%20Confidence%20Monitor%20Summer%202011_tcm30-27897.pdf

VisitBritain Trends Update – August 2011

- Figures from TRI Hospitality Consulting show that in July London full-service hotel occupancy stood at a record 92.4%, with room rates also at a record high of £148.65, while in the provinces occupancy of 77.7 was up from 77.0% a year ago, while room rates were almost unchanged on July last year at £68.94
- BAA's six UK airports handled 0.8% more passengers in July than a year before, while Heathrow had its busiest ever month and, on 31 July, its busiest ever day in terms of passenger volumes. Domestic traffic fell 7.2% across BAA airports while European scheduled traffic rose 0.9%, North Atlantic traffic by 5.6% and other long-haul traffic by 3.9%. Traffic to/from Brazil was up 80% in July compared with a year ago.

For a general news update from Visit England – click here

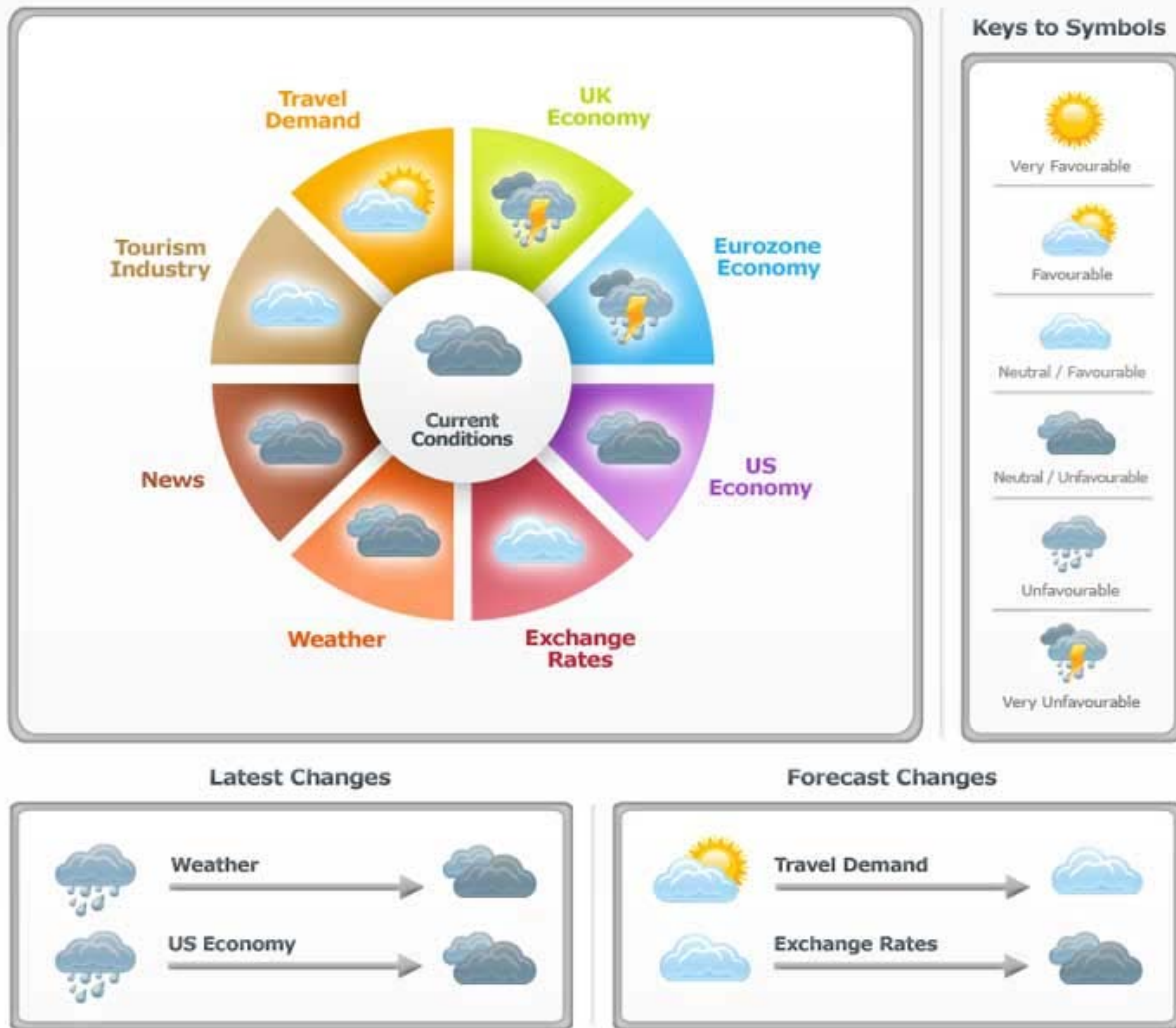
http://www.visitengland.org/Images/News%20Stories%20September%202011_tcm30-28128.pdf

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Visit Kent's Business Barometer



All enquiries regarding the Business Barometer should be directed to Tracey Parker, Research Manager, Visit Kent on 01227 812905 or tracey.parker@visitkent.co.uk; or Kelly Sharp, Research and Development Assistant, on kelly.sharp@visitkent.co.uk

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