



Visit Kent's Business Barometer December 2011

Due to the improved weather compared to 2010 many of the businesses benefited. Channel crossings were up generally as visitors were able to access the ports and Eurotunnel, attractions who normally see much reduced numbers in December had a boost, and business visitors were able to make their conferences. This month's data very much reinforces the dramatic effect the weather can have on tourism.

Comparison December 2010/2011

Attraction Visitor Numbers	Up 20%
VIC Visitor Numbers	Up 4%
Cross Channel Passengers	Up 4.9%
Serviced Accommodation Smaller hotel, B&B and Guesthouses	Up 7.6%
Serviced Accommodation Larger Hotel Accommodation Source 2011 STR GLOBAL Ltd	Up 7.4%
Conference and Event/Business Tourism	Up 5%

Topline Summary

- As December 2010 was the coldest in 100 years it is no surprise that businesses in the main did better this year. However, in most cases they were not back up to 2009 levels.
- Attractions were 20% up, but as December is a month for lower visitor figures generally then any rises resulting from better weather this year were exaggerated by low starting points.
- Visits to Visit Kent websites, consumer and B2B, were up this month. For the year end visits to the consumer site were up by 29% with page views up by 53.56%. Total visits for the B2B site for the year end were up by 9.14% and page views by 6.29%.
- Both larger and smaller serviced accommodation received a late year boost from the weather when guests were able to make their visits. B&B's in particular in countryside areas did better this year.
- 35% of attractions stated that their coach market had been up in the final quarter of 2011 compared to 2010. 74% of attractions were confident about the first quarter of 2012.

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Attractions

Kent visitor numbers in December

Visitor numbers	2010	2011	% change
	157,879	189,830	Up 20%

Kent visitor numbers – Year to date

The 'year to date' visitor figures from our sample (excluding retail) are below, but more comprehensive end of year calculations are available on our end of year Barometer for 2011:

	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%
September	393,886	388,059	Down 1.5%	2,887,308	2,932,421	Up 1.6%
November	323,307	350,986	Up 8.6%	3,210,615	3,283,407	Up 2.3%
December	157,879	189,830	Up 20%	3,368,494	3,473,237	Up 3%

Range of performance amongst attractions overall

Due to the attractions only expecting smaller quantities of visitors in December and because of the good weather compared to last December, many reported very positive increases. All attractions except two reported a rise in visitor figures, and the rises ranged from 4% to 320%, but as mentioned these rises are magnified by the unusual circumstances.

Performance according to attraction type, % change December 2010/11

Historic Building/ Heritage Attraction	Museum	Other
Up 16%	Up 67%	Up 32%

Performance according to attraction size, % change December 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 117%	Up 56%	Up 10%	Up 44%	Up 17%

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Performance according to cost, % change December 2010/11

Charging	Free
Up 18%	Up 49%

Performance according to location, % change December 2010/11

Coastal	Rural	Urban
Up 7%	Up 27%	Up 45%

Positive factors affecting visitor numbers this month
Additional events and publicity
Good weather – no snow
Mild weather for time of year
Other activities and events in the town brought visitors in
More group business
Less competition
Opened our visitor centre for the first time
Increase in local produce
More advertising

Negative factors affecting visitor numbers this month
People being more aware of how much they are spending over Christmas
Secondary spend lower than previously
Economic climate
Not enough seats for the demand
Lots of people shopping & not visiting
Reduction in opening hours over Christmas
High fuel prices

Overseas visitors to attractions in December

81% of visitors were from the UK, 8% long haul and 12% from Europe. Of the overseas visitors, 76% were from France, 12% from Germany, 6% from the USA and 6% from 'Other' origins.

Attractions' Confidence for the 4th Quarter of 2011

Attractions' performance compared to 4th Quarter 2010

Attractions' performance in the last quarter compared to the same period last year	%
Much Better (up by more than 10%)	13.0
Better (up by 5-10%)	0.0
Slightly Better (Up by 1-5%)	21.7
About the same	56.5
Slightly Worse (Down by 1-5%)	8.7
Worse (Down by 5-10%)	0.0
Much Worse (Down by more than 10%)	0.0

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Attractions' expectations for the next quarter

Attractions' expectations for the next quarter	%
Much Better (up by more than 10%)	26.1
Better (up by 5-10%)	21.7
Slightly Better (Up by 1-5%)	26.1
About the same	17.4
Slightly Worse (Down by 1-5%)	8.7
Worse (Down by 5-10%)	0.0
Much Worse (Down by more than 10%)	0.0

Coach market to attractions

Coach market up	Coach market same	Coach market down
34.7%	56.5%	8.7%

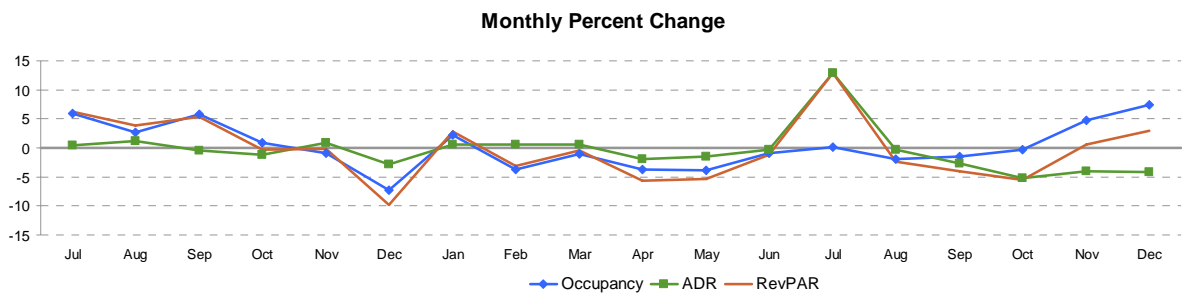
Top three concerns for attractions in December

These concerns shown in December have been the top concerns for attractions throughout 2011, and do not look set to change.

Top three concerns for Kent attractions overall in December
UK Economic Climate
Increase in Fuel costs
Weather

Accommodation

Serviced Accommodation (larger hotels, chains)
Source STR Global 2011



Year on year change in monthly occupancy

Occupancy for the larger hotel chains in December was 7.4% up compared to 2010, with Average Daily Rates down 4.1% and Revenue per Available Room up 3.0%.



End of year change

Occupancy (%)	Year To Date		
	2009	2010	2011
This Year	69.2	71.8	71.6
Last Year	67.5	69.2	71.8
Percent Change	2.5	3.7	-0.3

Smaller hotels, guest houses and B&B's Source RIBOS (www.ribos.co.uk)

With December 2010 being the coldest for 100 years it was very likely that the occupancy in December 2011 would be higher, and this has proven to be the case with a rise of 7.59%.

Kent occupancy December

	Dec 2010	Dec 2011
Kent	33.7%	41.3%

December occupancy according to location

Location	%Occupancy 2010	%Occupancy 2011
Countryside/village	17.73	29.33
Seaside	35.88	32.41
Large town/city	46.30	52.45
Small town	24.86	28.64

December occupancy according to business type

Location	%Occupancy 2010	%Occupancy 2011
Bed and Breakfast	21.88	35.95
Guest House	32.96	35.89
Hotel/Inn	42.67	47.43

Cross Channel Carriers

Channel crossings are now be reported on quarterly, as the figures are not now released by the carriers on a month by month basis. Overall for channel crossings, December was a good month as passengers and vehicles were not prohibited from reaching their crossings by snow, as was the case in 2010.

Quarter 2 – July to December 2010/11 totals

	2011	2010	% change
Passengers	2,937,593	2,800,683	Up 4.9%
Cars	746,603	700,238	Up 6.6%
Coaches	20,611	20,590	Up 0.1%



VICs

VICs Comparison December 2010/11

Name of VIC	Footfall Dec 2011	Footfall Dec 2010	% Change	Phone Dec 2011	Phone Dec 2010	Emails Dec 2011	Emails Dec 2010
Ashford	378	417	-9	69	170	224	248
Canterbury	18650	23384	-20	501	551	113	77
Deal	811	405	100	32	36	217	95
DFH&RM	0	0	n/a	283	358	144	111
Dover	2329	2601	-10	157	165	378	416
Gravesend	2133	1558	37	237	189	257	257
Maidstone	2610	3658	-29	242	279	11	14
Medway	38848	33024	18	559	802	166	207
Royal T. Wells	2128	660	222	270	271	231	279
Thanet	1548	1146	35	43	49	46	19
Tonbridge	890	788	13	404	514	0	0
Kent	70325	67641	4.0	2797	3384	1787	1723

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

63.6% of visitors to VICs were from France, with 18.2% from the Netherlands, 9.1% from Germany and 9.1% from 'other' origins. This is in keeping with the usual trend this time of year when French day visitors continue to come in educational trips and day trips.

Nationality of VIC visitors

Name of VIC	% Domestic Visitors	% Long Haul visitors	% European visitors	Euro visitors compared to December 2010
Ashford	95	0	5	Down 3%
Canterbury	70	10	20	Down 15%
Deal	98	1	1	Down 3%
DFH&RM	90	2	8	Down 6%
Dover	65	10	25	Up 4%
Gravesend	89	3	8	No change
Maidstone	100	0	0	Down 5%
Medway	85	5	10	Down 15%
Royal T. Wells	90	7	3	Up 2.5%
Thanet	99	0	1	Up 0.5%
Tonbridge	95	2	3	Up 1%

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Top concerns for VICs

Top three concerns for Kent VICs overall in December
UK Economic climate
Strength of the pound
Competition from other parts of the UK/Weather

VICs' Performance for the fourth Quarter of 2011

VIC performance in the last quarter compared to the same period last year	%
Much Better (up by more than 10%)	27.3
Better (up by 5-10%)	0
Slightly Better (Up by 1-5%)	9.1
About the same	45.5
Slightly Worse (Down by 1-5%)	9.1
Worse (Down by 5-10%)	9.1
Much Worse (Down by more than 10%)	0

VICs' Performance 2011

The second and fourth quarters show better performance for the VICs, particularly the fourth quarter where VICs benefited from the better weather.

VIC performance in the last quarter compared to the same period last year	First Quarter %	Second Quarter %	Third Quarter %	Fourth Quarter %
Much Better (up by more than 10%)	0	8	7	27.3
Better (up by 5-10%)	8.3	15	0	0
Slightly Better (Up by 1-5%)	16.7	31	29	9.1
About the same	50	23	29	45.5
Slightly Worse (Down by 1-5%)	8.3	8	21	9.1
Worse (Down by 5-10%)	8.3	8	0	9.1
Much Worse (Down by more than 10%)	8.3	8	14	0

VICs' expectations for the first quarter 2012

VIC expectations for the next quarter	%
Much Better (up by more than 10%)	18.2
Better (up by 5-10%)	9.1
Slightly Better (Up by 1-5%)	18.2
About the same	36.4
Slightly Worse (Down by 1-5%)	0
Worse (Down by 5-10%)	9.1
Much Worse (Down by more than 10%)	9.1



VICs' confidence for the 'next' quarter 2011

After a stronger end to the year, some VICs were more confident going into 2012.

VIC expectations for the next quarter	First Quarter %	Second Quarter %	Third Quarter %	Fourth Quarter %
Much Better (up by more than 10%)	0	8	7	18.2
Better (up by 5-10%)	17	8	14	9.1
Slightly Better (Up by 1-5%)	33	39	43	18.2
About the same	25	23	15	36.4
Slightly Worse (Down by 1-5%)	8.3	8	7	0
Worse (Down by 5-10%)	8.3	15	0	9.1
Much Worse (Down by more than 10%)	8.3	0	14	9.1

Business Tourism

Conference and business events were up by 5%, weddings static but other types of events were 14% down. Reasons given for this fall were businesses restricting spend on Christmas events and the result of the way the weekends fell in December this year. Christmas parties were hard to sell on the first weekend (3rd & 4th) as it was deemed too early so there were only really two key weekends for these to happen.

Average length of conferences held

Length of conference	Half a day	1 day	2 days	3 days +
% of conferences held	51	46	3	0

The average tariff ranges of venues participating

Tariff range	% of venues within this range
Under £17	23.1%
£18 to £25	30.8%
£26 to £30	23.1%
£31 to £40	15.4%
£41 to £50	7.7%
£51 or more	0%

Origin of conference delegates

Kent	London	UK	Overseas
94%	4.1%	1.1%	0%



Visit Kent News

Visit Kent Research

We are currently compiling the end of year Barometer and this will be produced shortly. Thank you to all the contributors over the last year that have made this document possible. The Business Barometer now contains feedback from over 300 businesses in Kent. If you would like to be a participant in the coming year, please contact the research team on 01227 812905, or tracey.parker@visitkent.co.uk.

Tourism South East has been instructed to complete a Cambridge Model measurement of the economic impact of tourism for 2011 and this will be available at the end of 2012. Visit Kent is also currently evaluating the impact of its marketing activity and will be releasing top line figures from its conversion research shortly.

Visit Kent Marketing

My Kent Big Weekend

Scores of visitor attractions and destinations across Kent and Medway are getting ready to give away thousands of free tickets to local residents for the My Kent Big Weekend 2012. The popular annual event organised by Visit Kent celebrating the county's tourism, leisure and hospitality industry will be held on 17 and 18 March. Free tickets to castles, historic houses, animal attractions, museums and a wide range of visitor experiences are featured on the special event's website at www.mykentbigweekend.co.uk. Kent and Medway residents will be able to apply for free tickets, two per household, which will be allocated on a ballot system after the website closes for applications on 13 February. For 2012, cross-Channel service providers Eurolines and Eurotunnel have also joined forces with Visit Kent and their tourism partners in the Nord Pas De Calais to enable a number of Kent people to visit attractions in France and vice versa. The weekend of Kent entertainment will also mark the end of the first England Tourism Week highlighting the importance of the industry to the national economy.

2012 Visit Kent Magazine

The 2012 Visit Kent Magazine in partnership with Archant KOS media has been launched. This year the printed version has six different cover designs and content is split between "rural" and "coastal" meaning anyone wanting to plan their day trip or short break to the county can pick up the edition which best suits their needs. If you would like to receive a copy please contact stephanie.blackwellgraham@visitkent.co.uk or see the electronic version on www.visitkent.co.uk

2012 Visit Kent Magazine

Kent County Council in partnership with Visit Kent is offering 300 volunteers the opportunity to become official Games Time Kent Greeters and play an active part in the 2012 Games.

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Games Time Kent Greeters will be on hand to provide support and advice to residents and visitors from July 17 to September 9. They will play an essential role along the route of the Torch Relay, including the special events and overnight stops at Dover and Maidstone, and at key transport hubs such as Dover, Ebbsfleet and Sevenoaks during the Olympics and Paralympics.

Volunteers need to be over 18 years old with an overriding enthusiasm for the Games, the county and meeting new people. No specific skills or qualifications are required and full customer service training will be given including access to a fun, online Welcome to Kent training programme. For further information go to www.visitkentbusiness.co.uk

Visit Kent Websites

Visits to the Visit Kent consumer website were up by 10.89% and page views up by 28.22%.

Consumer website www.visitkent.co.uk

Visits Dec 2009	Visits Dec 2010	Visits Dec 2011
130,929	177,860	197,242

B2B website www.visitkentbusiness.co.uk

Visits to the B2B website were up 8.67% but page views were down by 10.33%.

Visits Dec 2009	Visits Dec 2010	Visits Dec 2011
967	1,038	1,128

Other News

Weather

According to the Met Office, a persistent Atlantic airstream brought changeable, sometimes stormy, weather and generally mild conditions especially to southern counties and in the last 10 days. The mean temperature was 0.9 °C above the 1971-2000 average, making it the mildest December since 2006 and 6 °C warmer than December 2010. Rainfall amounts were over 50% above normal in East Kent and much of North-West England but close to normal elsewhere.

Visit Britain – Trends Update

- The government gives the go ahead for a second terminal to be built at the Port of Dover, 'when market conditions require'
- Due to the disruption to Sea France sailings P&O Ferries adds an additional vessel to its Calais to Dover route
- BAA's six UK airports handled 0.9% fewer passengers in November than a year before, with domestic routes seeing a 3.0% fall in comparison with no change in the volume of passengers on European scheduled routes, an increase of 3.5% on North Atlantic routes and drop of 3.8% on other long-haul routes

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- Figures from TRI Hospitality Consulting show that in November London chain hotel occupancy declined from 84.5% a year ago to 82.6%, though with average room rates up from £136.33 to £139.20. Outside London occupancy was flat at 70.0% while average room rates fell from £70.39 to £69.47
- Latest UNWTO figures indicate that global international tourism increased at an annual rate of 4.5% during the first eight months of 2011, with Europe showing the fastest growth (+6%)

GB Tourism Survey October 2011

The most recent GB Tourism Survey indicated that in October attractions were 9% up in England (comparing with 8.6% in Kent), and room occupancy for serviced accommodation was 67% in England (compared with 73.7% STR occupancy for larger hotels in Kent, and 60.42% occupancy for the smaller and independent hotels on RIBOS in Kent). Full details can be found on the following link: http://www.visitengland.org/Images/October%202011-%20Commentary%20of%20results_tcm30-30061.pdf

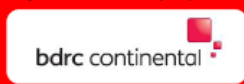
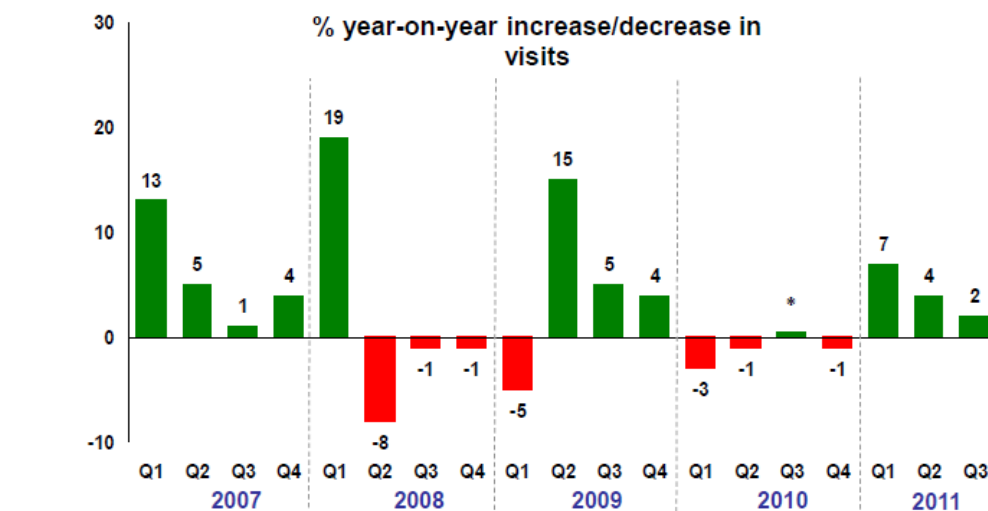
A summary for the third quarter of the volume and value of tourism compared to 2010 can also be found on the following link: http://www.visitengland.org/Images/GBTS%20-%20Quarterly%20Regional%20Summary%20-%20Q3%202011_tcm30-29840.pdf

England Attractions Monitor – Visit England

Visit England reports a 2% rise in visitor numbers for quarter 3 in England, whereas for Kent we experienced a smaller 0.44% rise across the three months of July/August/September 2011.

Year-on-Year Quarterly Visit Trends

Whilst visits have continued the trend of increasing year-on-year, the rate of increase has slowed somewhat in Q3, with visits increasing by an average of 2% compared with Q3 2010.



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Full details can be found of the attractions monitor at:

http://www.visitengland.org/Images/2011%20Q3%20Report%20v1_tcm30-29025.pdf

England Occupancy Survey – Visit England

The Visit England survey shows room occupancy at 56% (excluding STR) whereas Kent occupancy under RIBOS (excluding STR) was 48.1%. The national figure is skewed by the London occupancy figures. Full details are on the following link:

http://www.visitengland.org/Images/November%202011%20Final%20Graphs%20for%20EOS%20Reporting%20excluding%20regional_tcm30-29931.pdf

Domestic Industry Panel

Industry experts are asked their opinions on a number of key issues relating to the industry. Their latest report can be found on the link below and show that:

- Prolonged economic slowdown is the main challenge
- Overheads have risen for both customer and business
- Restrictions on bank lending is hurting business
- Late booking trends remain strong
- Customers are demanding the best possible deals
- Overall secondary spend is down but memberships are growing
- People do still want to indulge themselves, though perhaps on a smaller scale.
- Quality of experience is a prerequisite too
- Domestic breaks are seen as a good value alternative to heading overseas
- Despite concern at the overall Eurozone area, inbound tourism is seen as a growth area.
- Continued impact of economic slowdown on business tourism

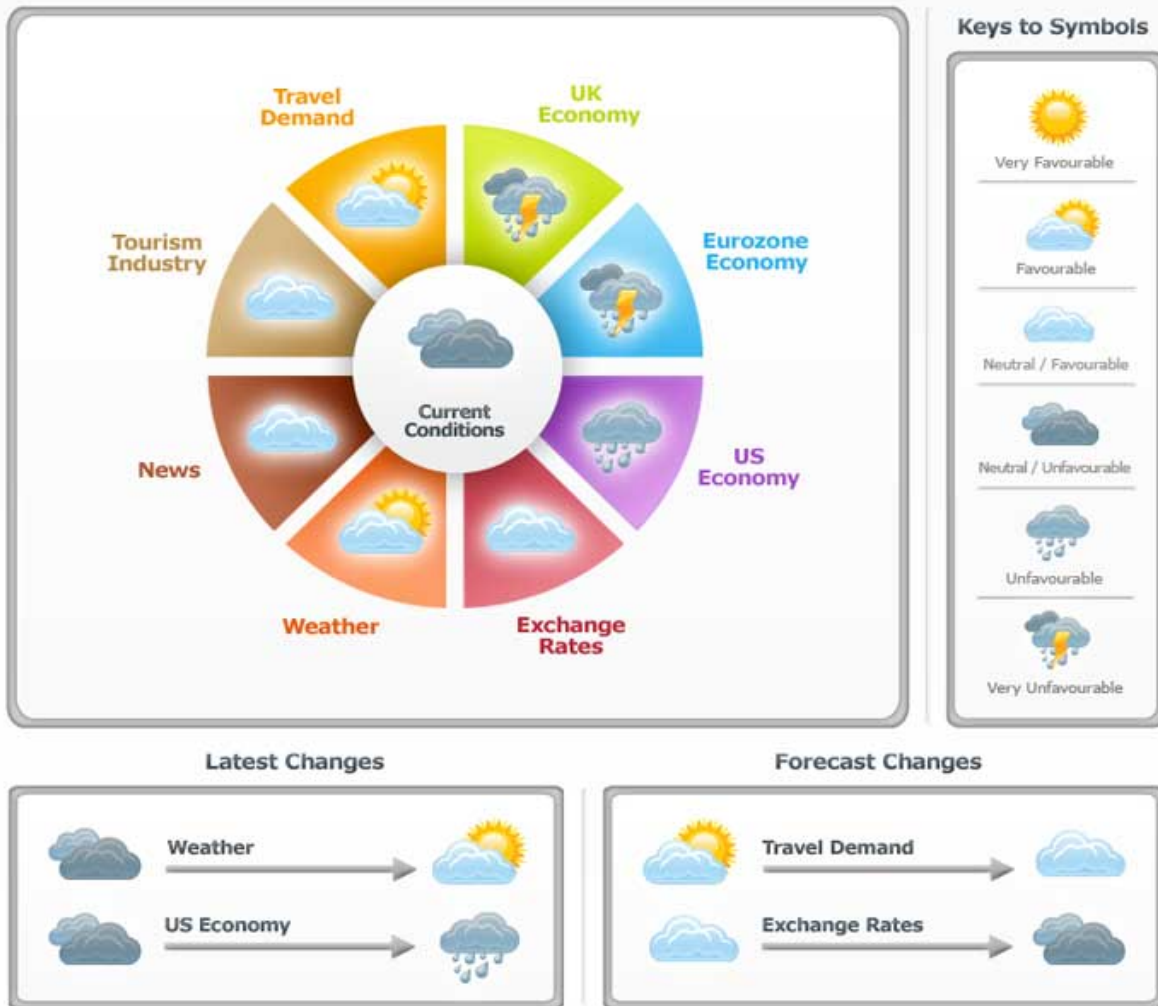
http://www.visitengland.org/Images/DIP_Wave_16_Lisafinal_tcm30-29096.pdf

Staycation Research – Visit England

The most recent update on the tendency for staycations can be found in the attached report and show that in 2011, 70% of UK residents took at least one UK break although longer holidays still tended to be overseas.

http://www.visitengland.org/Images/Staycation%202011%20Autumn%202011_for%20website_tcm30-28685.pdf

Visit Kent's Business Barometer



If you have any comments or questions relating to the Business Barometer, please contact the Research team:

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