



## Visit Kent's Business Barometer February 2010

February has been another month directly affected by extreme weather, with snowy conditions causing accessibility problems for many, both working and enjoying leisure time.

### Comparison February 2009/2010

<b>Attraction visitor numbers</b> Rural and open air attractions suffered due to the heavy snow	<b>Down 12%</b>
<b>TIC Visitor Numbers</b>	<b>Up 15%</b>
<b>Cross Channel Passengers</b> February 2009 saw French fishermen blocking the ports during their strike.	<b>Up 3%</b>
<b>Business Tourism</b>	<b>Down 4%</b>
<b>Serviced Accommodation</b> Small hotel, guest house and B&B occupancy for Feb	<b>Down 4%</b>
<b>Serviced Accommodation</b> Larger Hotel Accommodation Occupancy for Feb Source 2010 STR GLOBAL Ltd	<b>Up 4%</b>

### Other news

- ◆ Larger serviced accommodation providers in accessible locations fared better in the snow than smaller hotels, guest houses and B&B's.
- ◆ TICs reported a wide variety of nationalities visiting Kent in February
- ◆ Visit Britain (Quarterly Tourism Trends) confirmed that in December there was an increase in visitors to the UK from over the channel who cited 'miscellaneous activity' (probably Christmas shopping) as their motivation.
- ◆ Visit Britain reported a rise in North American visitors in the last quarter which is born out by the December Barometer.
- ◆ Car crossings of the channel were up by 12% following tactical campaigns promoting cheap day trips.
- ◆ Visit Kent's consumer website saw a 59% increase in visits in February 2010 compared to 2009.
- ◆ Visit Kent's B2B website saw a 53% increase in visits in February 2010 compared to 2009



## Attractions

### Kent visitor numbers in February

Visitor numbers	2010	2009	% change
	126612	143756	Down 12%

### Kent visitor numbers – Year to date

The 'year to date' visitor figures from our sample (excluding retail) are:

	2009	2010	% change for month	Year to date Totals 2009	Year to date Totals 2010	% change for year to date
January	98,955	81,026	Down 18%	98,955	81,026	Down 18%
February	143,756	126,612	Down 12%	242,711	207,638	Down 14%

### Range of performance amongst attractions overall

The performance of 7 of the attractions ranged between 3 and 37% up, but a further 10 attractions reported a fall in visitor numbers, ranging from 1% to 52%. One attraction remained the same as last year

### Performance according to cost % change Feb 09/10

Free attractions submitting tended to be indoor type attractions and so were less affected by the weather.

Charging	Free
Down 13%	Up 6%

### Performance according to location, % change Feb 09/10

Rural attractions suffered the most due to their inaccessibility during the snow and poor weather.

Coastal	Rural	Urban
Sample too small	Down 33%	Down 4%

### Performance according to attraction type, % change Feb 09/10

Indoor attractions such as museums fared better than those with an outdoor element.

Historic Building/Heritage Attraction	Museum	Other
Down 12%	Up 2%	Down 22%



**Performance according to size, % change Feb 09/10**

The bigger attractions suffered most in the poor weather, as most have an outdoor element to them.

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 4%	No change	Down 26%	Down 14%

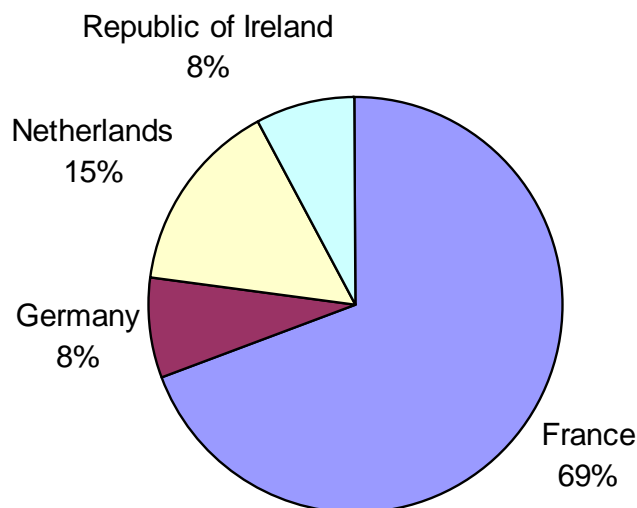
**Factors affecting visitor attraction results**

Positive
An increase in school parties
Very busy school holiday activities
Events and exhibitions held

Negative
Snow
Lack of groups
Low corporate numbers
Economic climate

**Overseas visitors to attractions in February**

Due to the poor weather visitor numbers were down generally, and the range of overseas visitors reduced too.





# Accommodation

## Serviced Accommodation

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

This total includes all of the guest houses, B&B's and smaller hotels who feed into our online system. Occupancy has **fallen by 4.4%**, compared to February 2009 caused by cancellations due to the weather, and inaccessibility due to public transport problems caused by the snow

Kent	Feb 2008	Feb 2009	Feb 2010
<b>Net Room Occupancy</b>	<b>50.6</b>	<b>41.0</b>	<b>36.6</b>

### Larger hotels

Our hotel occupancy figures for Kent show that occupancy **rose by 4.8%** in February 2010 (STR Global Ltd). Occupancy was 64.9% compared to 61.9% in February 2009. The larger hotels are generally in more accessible locations and therefore fared better than the smaller serviced providers during the snowfall.

### Self Catering Accommodation

Due to Visit Kent's need to ensure the occupancy data for self catering is dovetailed into the new national system effectively, there is a delay on reporting these figures, but we will bring them to you, and backdate them as soon as they are available.

# TICs

## Factors affecting visitor numbers to the TICs in February 2010

Positive Factors
Low cross channel fares
Half Term boosted numbers
Exchange rates for the Euro encouraged visitors

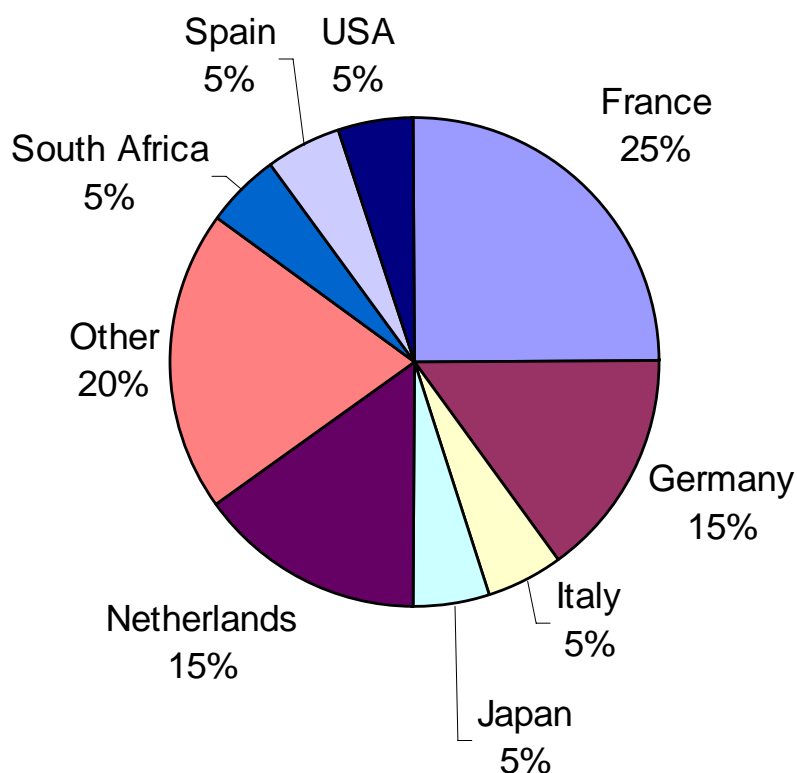
Negative Factors
Wintery weather conditions
Economic uncertainty



### TICs Comparison February 2009/10

Name of TIC	Footfall Feb 2010	Footfall Feb 2009	% change Feb 09/10	Phone Calls Feb 2010	Phone Calls Feb 2009	Postal/emails Feb 2010	Postal/emails Feb 2009
Ashford	917	895	2	252	245	6	3
Broadstairs	390	401	-3	14	24	0	0
Canterbury	28120	19277	46	679	633	187	189
Deal	1208	1090	11	100	131	196	357
DFH&RM	0	0	n/a	662	534	315	173
Dover	4372	4837	-10	224	298	507	675
Faversham	691	806	-14	0	0	0	0
Gravesend	1818	2069	-12	243	276	231	235
Maidstone	5110	2579	98	440	281	46	59
Margate	1748	2438	-28	175	221	50	108
Medway	15240	16864	-10	779	631	287	269
Ramsgate	2066	1612	28	221	82	52	21
Royal T Wells	4308	4201	3	356	322	447	400
STOP24	689	0	n/a	0	0	0	0
Tonbridge	1392	1397	0	571	696	138	9324

### Origin of TIC visitors in February





### Nationality of TIC visitors

Name of TIC	% Domestic Visitors	% Long Haul visitors	% European visitors	Euro visitors compared to Feb 2009
Ashford	91	0	11	Up 3%
Broadstairs	87	0	13	Up 5%
Canterbury	75	5	20	Down 15%
Deal	95	1	4	No change
DFH & RM	93	1	6	Down 9%
Dover	60	10	30	Up 5%
Faversham	95	2	3	Up 2%
Gravesend	97	2	1	No change
Maidstone VIC	99	0	1	Down 0.5%
Margate	99.2	0	0.8	Up 0.8%
Medway VIC	75	5	20	Up 10%
Ramsgate	97.5	1.5	1	No change
Royal Tunbridge Wells	80	10	10	Up 5%
Tonbridge	95	2	3	Down 2%

## Cross Channel Carriers

These figures are the combined totals for the Port of Dover and Eurotunnel and show that car crossings were up by 12% partially as the result of day trip promotions. The figures still contain an element of readjustment following the fire closure of the tunnel. Also in February 2009, French fishermen went on strike which caused delays at the ports, and so the February 2009 crossings were affected.

February	2009	2010	% CHANGE
Passengers	768315	798551	4%
Cars	175972	197553	12%
Coaches	5208	4921	-5%



## Business Tourism

The sample for February was smaller than for January which is evident in the number of events taking place. If you are a conference or event venue and would like to take part in this part of the survey, please contact Tracey Parker on 01227 862792, as the larger the sample, the more representative the analysis.

### Number of events taking place

2010	2009	% change
96	100	-4%

The number of delegates at the events cited was in total 2524

### Factors affecting business this month

Negative factors
Snow
'Half term results in less bookings'
Positive factors
All were repeat bookings

### Length of conferences

Half a day	1 day	2 days	3 days or more
29%	46%	17%	8%

### Average daily delegate rate for this month

£31 to £40

### Origin of delegates

81% of delegates came from Kent, 16% from London, and 3% from the rest of the UK. No delegates originated from overseas.

## Visit Kent News

### Visit Kent Marketing

Visit Kent is currently busy planning its campaign activity for the forthcoming financial year. Activity will include a brand new "Kent Contemporary" campaign which aims to reposition Kent for the 21<sup>st</sup> Century; the campaign being delivered by leading creative agency M&C Saatchi will include stunning new photography and high profile advertising site in London, backed up by a new user-generated content website featuring real people and real places. Visit Kent is now looking for characters to include in the campaign. If you have an interesting background, unique job or real passion for the county we want to hear your story! Please contact Scott Mackay for an application form – [scott.mackay@visitkent.co.uk](mailto:scott.mackay@visitkent.co.uk)



### Visit Kent Research

The Research Team recently attended their first Research Symposium at Breda Holland where experts and guest speakers from the four partner countries were gathered to discuss economic impact models, and how to measure and benchmark the value of tourism in the four partner regions. Peter Lane from the English Tourism Intelligence Partnership reported on recent developments and issues in data collection. The new virtual network on which research will be shared will be up and running from April 2010 onwards.



### Visit Kent Websites

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

In February the website saw a 59% increase in visits and an 18% increase in page views.

February 2009	February 2010
100,048	159,072

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

The B2B website is attracting a steady flow of visits. Visits to the site increased 53% year on year and page views by 32%.

February 2009	February 2010
1,071	1,641

## Other News

### Weather

Provisionally it was the coldest February in the UK since 1991. According to the BBC, ten to 20cm of snow fell in Kent and East Sussex on 10th and 11th February, resulting in road and rail delays and hundreds of school closures

Overall, it was cold with mean temperatures 1-2C below the 1971-2000 average across England and Wales



### **Visit Britain – Tourism Trends Quarterly Issued 4th Feb 2010**

According to Visit Britain, for 2009 although there had been a decline in overseas trips to the UK there were “definitely glimmers of encouragement to be found in the numbers, with a 3% jump in overseas visitors choosing to take a holiday in Britain last year, equivalent to an increase of 350,000”

Visit Britain goes on to say that “during the final three months of 2009 holiday visits increased at an annual rate of 5%, and trips classified as having a ‘miscellaneous’ purpose witnessed a jump of 8%, we can be pretty certain that Christmas shopping trips from across the Channel was a key driver behind this trend”

The cross channel shopping trips are likely to be most prevalent in Kent due to our proximity to Europe, and so this would have supported our visitor numbers for December.

Visit Britain continued by saying that “Key European markets set the pace for much of 2009 with our near neighbours taking advantage of the value for money on offer in Britain, but one of the most positive signs emerging during the final months of 2009 was a return to growth in the number of visits from North America, with visits up 8% in the final three months of the year”. This was in evidence in our December Barometer where TICs reported visitors from Canada, attractions reported visitors from Canada and the USA, and accommodation providers mentioned USA visitors as their fourth highest group.

### **Visits to the UK in February 2010, from International Passenger Survey data**

- ◆ Visits in the three months to February from EU15 countries (nations who were members of the European Union before the 2004 expansion) are up 2% compared to the corresponding period a year earlier.
- ◆ Visits from North America are also recovering from their decline, up 3% in the three months to February.
- ◆ Visits from Accession countries are up 10% in the three months to February while visits from non-EU countries in Europe are up 11%, after both struggled in 2009.
- ◆ Visits from remaining parts of the world (Central and South America, Africa, Middle East, Asia and Australasia) were up 5% in the three months to February.

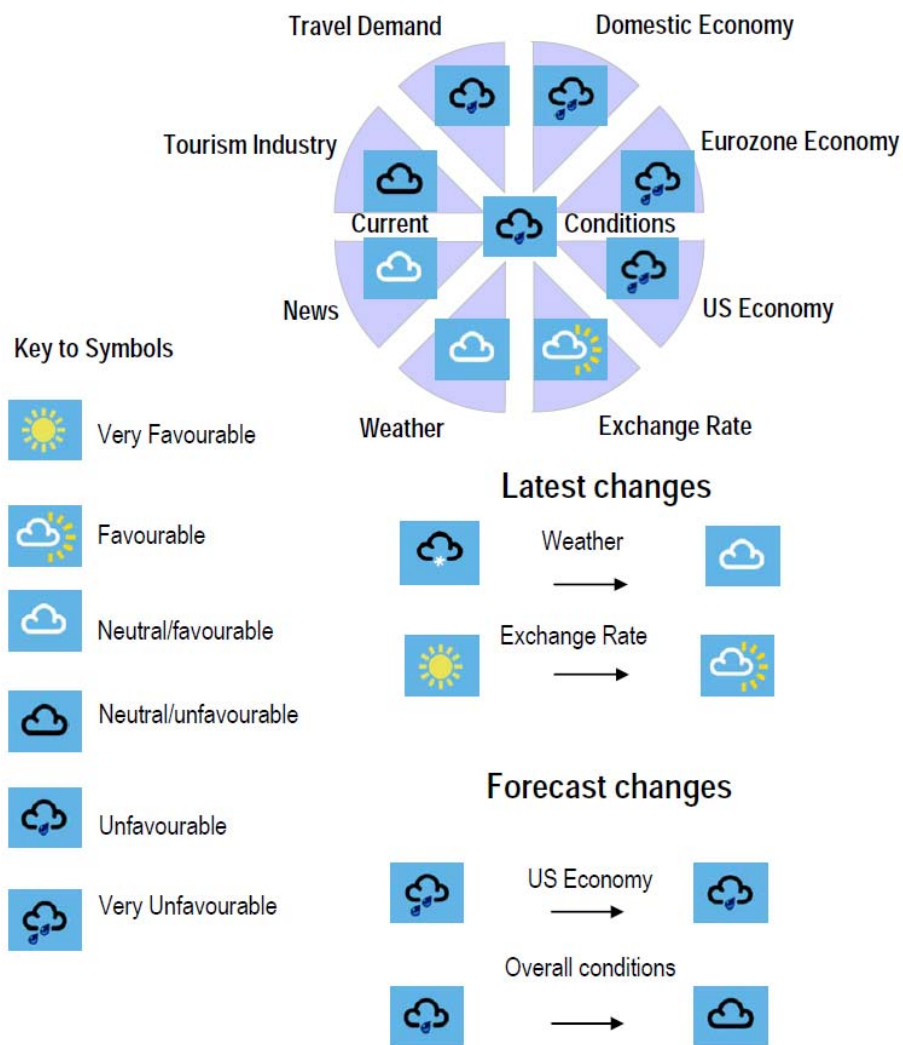
### **The IPS Headlines for February...**

- ◆ In February 2010, the number of overseas residents visiting the UK was 1% higher compared with February 2009. Looking at the last three months, from December 2009 to February 2010, 3% more visitors came to the UK when compared to the corresponding period a year earlier.
- ◆ Spending in the three months to February was 5% higher in nominal terms than during the corresponding period a year earlier.



- ◆ The Euro and the US Dollar weakened against the Pound in February 2010 compared to February 2009 (1% and 8% respectively), but remain strong compared to the previous three or four years. On average, £1 cost €1.50 in February 2007, but in February 2010 £1 cost just €1.14. £1 cost \$1.96 in February 2007 but cost just \$1.56 in February 2010.

## Factors contributing to tourism trends in Britain, February 2010



Source Trends Update No 123, 12<sup>th</sup> February 2010