



## Visit Kent's Business Barometer January 2010

January was a month of snow for Kent, at levels unseen for decades, and the coldest since 1987. This had an impact on all components of the industry with some attractions having to close as staff and visitors could not reach them. Other visitors cancelled their accommodation bookings in anticipation of travel difficulties, and business and leisure events, depending on their timing were also hit by cancellations.

### Comparison January 2009/2010

<b>Attraction visitor numbers</b> Many attractions reported closures due to snow, but coastal attractions fared better than rural or urban	<b>Down 18%</b>
<b>TIC Visitor Numbers</b> 5 TICs reported a rise in visitors, with overseas visitors mainly coming from France	<b>Up 9%</b>
<b>Cross Channel Passengers</b> A positive increase of 7% was seen in coach traffic	<b>Up 1%</b>
<b>Business Tourism</b> 90% of delegates came from Kent, and 92% of conferences were for a day or less.	<b>Up 3%</b>
<b>Hotel Accommodation Occupancy for Kent</b> <small>Source 2010 STR GLOBAL Ltd</small>	<b>Up 1%</b>
<b>Serviced Accommodation Occupancy - Other</b> This includes B&B operators, guest houses and the smaller hotels. Occupancy was hit by a number of cancellations due to the snow.	<b>Down 6%</b>

### Other news

- ◆ Smaller attractions suffered most in the poor weather, especially those with 20,000 visitors or less.
- ◆ French and Dutch visitors were the most prevalent.
- ◆ Tourist information centres were noticing an increase in face to face enquiries related to transport, during the snowy weather.
- ◆ The consumer website has experienced an increase of 46% in visits compared to January last year
- ◆ Visits to [www.visitkentbusiness.co.uk](http://www.visitkentbusiness.co.uk) have increased by 25% compared to last January
- ◆ In January UK consumer confidence improved to its healthiest level since the end of 2007



## Attractions

The visitor numbers in the tables below are from our sample of 16 attractions that submitted their figures this month. January is traditionally a quiet month, but a number of attractions closed due to the heavy snowfall this month, and so the sample is smaller than usual.

### Kent visitor numbers in January

Visitor numbers	2010	2009	% change
	81,026	98,955	Down 18%

### Range of performance amongst attractions overall

Many attractions visitor figures were down as they had to either close, or their public transport links were affected by the heavy snowfall in January. 12 of the attractions were down compared with last year, ranging from 2% down to 66% down. 4 attractions were up compared to last year, ranging from 1% up to 24% up.

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

Charging	Free
-19	-2

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

Coastal	Rural	Urban
16%	-21%	-20%

### Performance according to attraction type % change Jan 09/10

The January results reflect the attraction types that are open this time of year. For groups too small for separate analysis, they have been added to the 'Other' group for this month.

Historic Building/Heritage Attraction	Museum	Other
-17	-16	-2

### Performance according to size, % change Jan 09/10

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
-38	-19	-15	1	-3



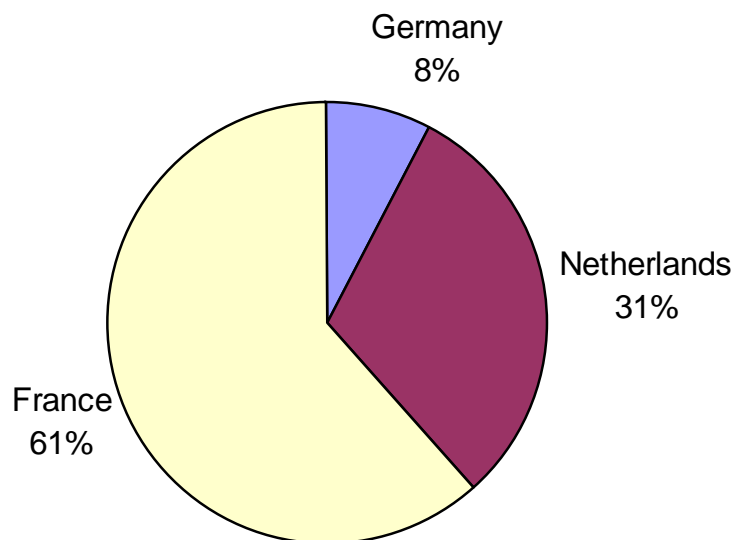
## Factors affecting visitor attraction results

Positive
Special event
Half price offer
New event at the beginning of the month
Shop

Negative
Snow and bad weather causing problems with access
Closure due to ice and heavy snow
Reduction in in-house visits and events
VAT Increase

## Overseas visitors to attractions in January

Of the 13 attractions that were able to identify their main overseas group to their attraction, only three groups were in evidence. French visitors were the main visitor at 61%, Netherlands second at 31%, and German visitors at 8%.





## Accommodation

### Accommodation

The research team has been working hard to ensure the new system is accurate, relevant, and compatible with the new national system. This has involved discussions over the last two months with businesses and the new national agency collecting the data. Visit Kent now has an excellent sample of hotels, bed and breakfasts, self catering properties and caravan and camping contributors taking part. Forthcoming barometers will carry a more robust picture of accommodation trends. Self catering will be included in future barometers and backdated to January.

### Hotel Occupancy

Our hotel occupancy figures for Kent are now obtained from STR Global Ltd, and show that occupancy rose by 1% in January 2010 (49.6%) compared to 2009 (48.9%)

### Serviced Accommodation Other

The serviced accommodation occupancy total for Kent was available by the time of issue of this Barometer. Smaller serviced accommodation was severely hit by the snowy weather in January and occupancy was 26% compared with 32% in January 2009, and 40% in January 2008.

## TICs

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

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

Positive Factors
French and Belgian shoppers enjoying the strong Euro
Enquiries were up due to public transport disruption

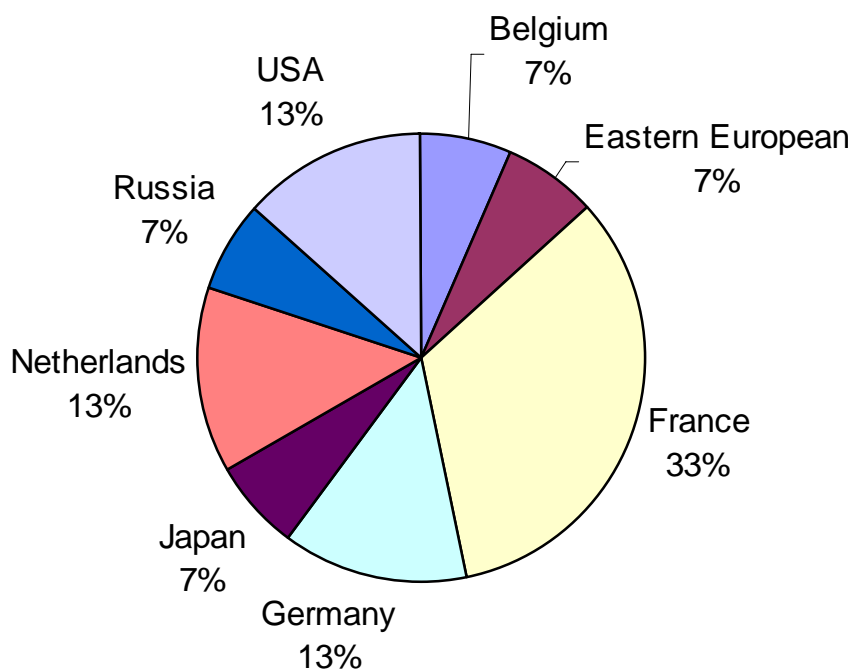
Negative Factors
Weather - disruption caused by Snow
Economic downturn
Disruption to public transport
Spend down



### TICs Comparison January 2009/2010

Name of TIC	Footfall Jan 2010	Footfall Jan 2009	% change January 09/10	Phone Calls Jan 2010	Phone Calls Jan 2009	Postal/ emails Jan 2010	Postal/ emails Jan 2009
Ashford	817	780	5	242	241	3	5
Broadstairs	148	201	-26	10	25	0	0
Canterbury	23578	15981	48	726	1915	181	183
Deal	896	1178	-24	110	129	172	297
DFH & RM	0	0	n/a	585	566	220	194
Dover	2681	3464	-23	521	998	800	1098
Faversham	623	715	-13	0	0	0	0
Gravesend	1747	2261	-23	227	265	234	257
Maidstone	4160	1798	131	376	293	50	39
Margate	1614	1910	-15	146	162	35	165
Medway	11048	14922	-26	567	777	239	271
Ramsgate	1788	1679	6	70	94	14	35
Royal T. Wells	2766	2701	2	442	417	334	369
STOP24	560	0	n/a	0	0	0	0
Tonbridge	1196	1330	-10	595	794	858	2078

### Origin of TIC visitors in January 2010





### Nationality of TIC visitors

Name of TIC	% Domestic Visitors	% Long Haul visitors	% European visitors	Euro visitors compared to Jan 2009
Ashford	92	1	8	Up 4%
Broadstairs	91	8	1	Up 0.5%
Canterbury	90	2	8	Down 17%
Deal	95	1	4	Up 1%
DFH & RM	90	3	7	Down 13%
Dover	70	10	20	Up 5%
Faversham	94	3	3	Up 3%
Gravesend	97	2	1	Down 5%
Maidstone VIC	99	0	1	Down 1%
Margate	88	2	10	Up 10%
Medway VIC	80	5	15	Up 5%
Ramsgate	99.7	0.01	0.02	No change
Royal Tunbridge Wells	85	10	5	Up 2%
STOP24	0	0	0	n/a
Tonbridge	95	2	3	n/a

## Cross Channel Carriers

These figures are the combined totals for the Port of Dover and Eurotunnel and show a positive increase in coach traffic in January 2010 compared to 2009 of 7%.

January	2009	2010	% CHANGE
Passengers	658,665	667,313	Up 1%
Cars	169,235	173,035	Up 2%
Coaches	3938	4197	Up 7%

## Business Tourism

New this month is the Business Tourism indicator which is the feedback from our conference venues in Kent on performance and issues affecting their businesses. Thank you to the 20 volunteers from Kent Conference Bureau who sent in their data.

Visit Kent's Business Barometer

The Business Barometer is a monthly performance snapshot of over 100 Kent tourism businesses





**Structure of the sample:**

- ◆ 50% of the sample are residential
- ◆ 90% are Quality Assured
- ◆ 40% are hotel with conference facilities, 25% purpose built conference centres, 10% educational, and 25% 'other'.
- ◆ The majority of contributors (75%) had capacity for at least 150 people in a theatre style setting. 20% had capacity for between 81 and 150 people, and the remaining 5% could provide space for 21 to 80.

**Number of events taking place**

2010	2009	% change
475	462	Up 3%

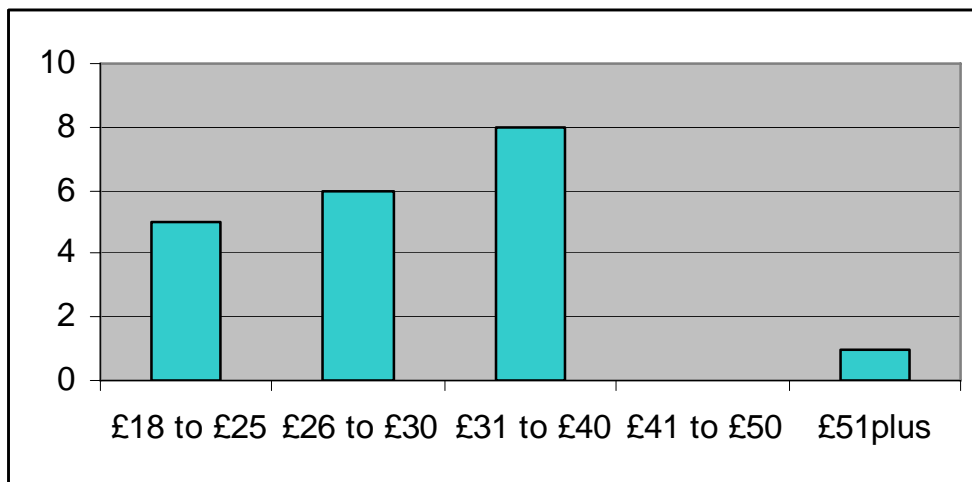
**Length of conferences**

The majority of conferences (92%) were held for either 1 day or less and so the majority of delegates did not stay overnight either at the host venue, or at local accommodation.

Half a day	1 day	2 days	3 days or more
26%	66%	6%	3%

**Average daily delegate rate for this month**

40% of the sample charged £31 to £40 per day for delegates.



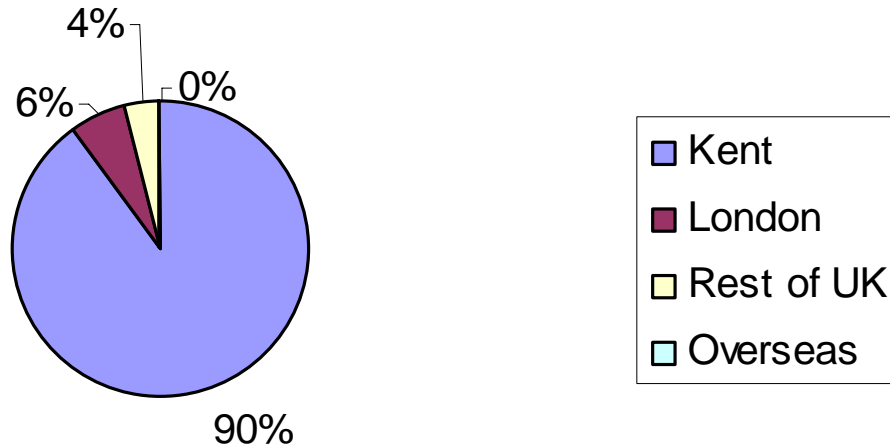
**Factors affecting business this month**

Positive factors
Refurbishment of buildings resulted in an increase in bookings
New clients recruited
Negative factors
The snowy weather caused cancellations, and a loss of confidence in travel. Many cancellations were last minute.



### Origin of delegates

Our sample showed that 90% of conference delegates in January 2010 came from Kent, 6% from London and 4% from the rest of the UK.



## Visit Kent News

### Visit Kent Research

The end of year Barometer for 2009, plus a full set of monthly reports is available on [www.visitkentbusiness.co.uk](http://www.visitkentbusiness.co.uk). Visit Kent has instructed Tourism South East to undertake a measurement of the economic impact of tourism in Kent, using the Cambridge Model. The results of this research will be available at the end of 2010/early 2011 and will be supported by local data gathered from visitor surveys at Districts across Kent.

### Visit Kent Websites

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

The consumer website has experienced an increase of 46% in visits compared to January last year. Page views have increased by 26%.

January 2009	January 2010
97,201	141,825

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

The B2B website has now been fully operating for over a year and comparisons can be made. Visits to the site have increased by 25% compared to last January, but page views have remained static at around 3500.

January 2009	January 2010
1,059	1,325



## 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 M&C Saatchi will include stunning new photography and high profile advertising site in London, backed up by a new user-generated content website.

Additional activity will include a 2FOR1 campaign with Southeastern rail, European activity, USA activity and a campaign to promote the new flight route from Edinburgh into Kent International Airport. For more information about Visit Kent Campaigns please contact [Lynnette.clark@visitkent.co.uk](mailto:Lynnette.clark@visitkent.co.uk)

## Other News

### Weather

According to the BBC, overall, it was a very cold month with mean temperatures 2.5 to 3.0C below the 1971-2000 normal over England and Wales. Provisionally, it was the coldest January over the UK since 1987 and equal eighth coldest in a series from 1914. During this time there were widespread delays to road, rail and air travel, thousands of school closures, interruptions to power supplies, numerous accidents as well as general disruption to businesses and everyday life.

### Visit Britain updates

#### Update 112 and Trends Update – Issue 123 (12 Feb 2010)

- ◆ Gatwick Airport handled 5.4% fewer passengers in January than a year before
- ◆ BA carried 8% fewer passengers in January than a year earlier, with declines across all geographic regions
- ◆ The UK Government says that the risk of a swine ‘flu pandemic’ has now passed
- ◆ In January UK consumer confidence improved to its healthiest level since the end of 2007

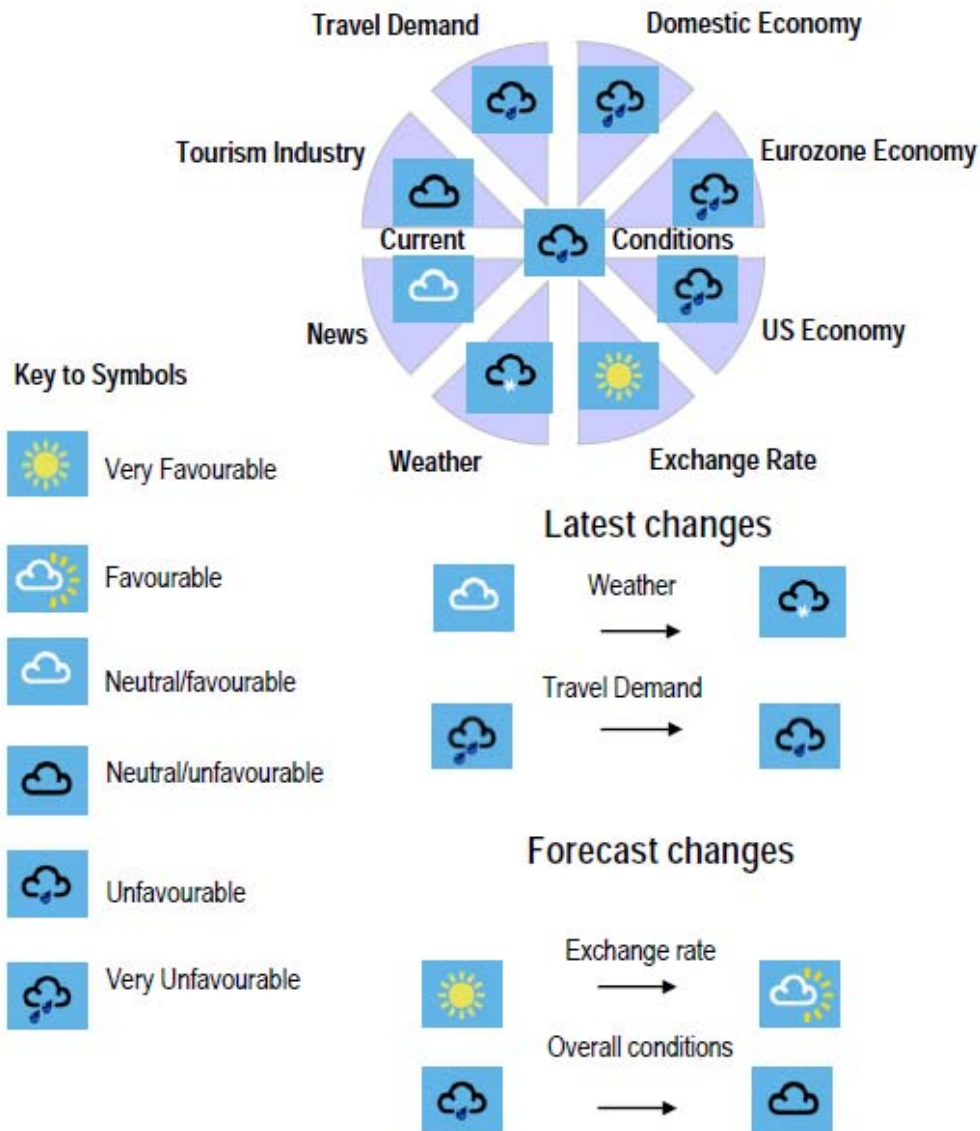
According to Key Tourism Facts from Visit Britain, the ‘direct effect of spending by tourists is estimated at £90bn in 2009, comprising of:	
<b>Spending by Overseas Residents</b>	<b>£ billion</b>
Visits to the UK	16.5
Fares to UK carriers	2.9
<b>Spending by Domestic Tourists</b>	<b>£ billion</b>
Trips of 1+ nights	22.2
Day Trips	47.6
Rent for Second Ownership	1.0

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



Source Visit Britain, Tourism Trends Update Number 121