Visit Kent's Business Barometer October 2011

A glorious beginning to the month meant visitors were out and about in Kent's attractions. Serviced accommodation at the smaller end of the range benefited from last minute bookings to take advantage of the weather.

Comparison October 2010/11	
Attraction visitor numbers	Up 8.6%
Conference and Event Venues	Down 23%
Visitor Information Centre (VIC) Footfall	No change
Serviced Accommodation which includes the independent and smaller hotels, B&Bs and guest houses. **Source:** www.ribos.co.uk/kent	Up 7.8%
Serviced Accommodation Larger Hotel Accommodation Occupancy for October Source 2011 STR Global Ltd	No change

Other news

- Smaller independent hotels, B&B's and Guest Houses are all up considerably in October compared to 2010, and 2.3% compared to 2009.
- In keeping with the late bookings due to the excellent weather, visits to the Visit Kent consumer website rose 64% compared to last October, with page views up by 69% as people hunted for late bargain breaks.
- Attractions are up 2.3% for the year to date, compared with the same time in 2010
- Confidence in attractions in Kent is still fairly strong, with 20% saying 2011 was much better so far than 2010, 40% saying better, and 27% saying it is the same.
- Visitor Information Centres results ranged from 39% down to 94% up.
- French visitors were the most prevalent overseas visitors at attractions in October.

Attractions

Kent visitor numbers in October 2011

Visitor numbers	2011 350,986	2010 323,307	% change Up 8.6%

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%
September	393,886	388,059	Down 1.5%	2,887,308	2,932,421	Up 1.6%
October	323,307	350,986	Up 8.6%	3,210,615	3,283,407	Up 2.3%

Range of performance amongst attractions overall

23 Attractions reported a rise in visitor numbers in October ranging from 4% to 145% up. 10 attractions reported a fall in visitor numbers ranging from 1% to 65%.

Performance according to cost % change Oct 10/11

Charging	Free
Up 9.2%	Up 4.4%

Performance according to location, % change Oct 10/11

Coastal	Rural	Urban
Up 7%	Up 18%	Down 4%

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

Museum	Historic Building/ Heritage Attraction	Other
Up 1.4%	Up 9%	Up 9.2%

Performance overall so far this year

Attractions remained pretty confident at this stage of the year, with 20% saying performance had been much better than last year, 40% better, 27% the same and only 13% experiencing a fall in performance, with none feeling business was 'much worse'.

Performance according to size, % change October 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 5.2%	Up 11.6%	Up 15.4%	Up 17.4%	Up 5%

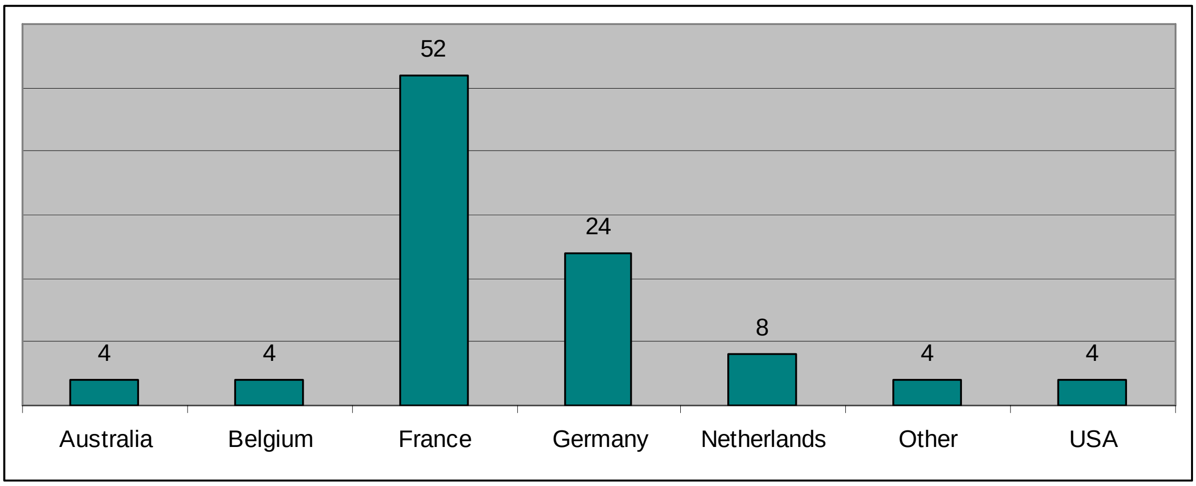
Factors affecting visitor attraction results

Negative factors
Lower attendance at special events
During 2010 we had free days for Public Sector Workers and Charity Workers so more visitors came in free of charge.
The weather
Press talking down the economy is never going to be helpful.
Petrol costs
Lack of volunteers
Economic climate Fuel prices
Local competition
Less events
Poor economy.

Positive factors
2014 increase in visitors compared to last year. Really good weather in October.
4000 increase on last year. Really good weather in October.
General improved awareness
Interest in local produce
Two extra special events
Up 7% - good groups market
Very good weather at the beginning of the month
Popular Halloween activities with our season ticket holders.
Good weather, interesting events, good autumn colour
Continued interest in local produce & English wine, No admission charge, start of Christmas buying, good weather
Good strong growth after recession from last year
Mild weather and strong groups market
Extra special events
Half term & additional Halloween events
Great weather during October Half Term. Nice weekend weather.
Special events

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

French day visitors were the most prevalent visitor in October at 52% of overseas visitors to attractions with German visitors second most prevalent at 24%.



Visitor Information Centres (VICs)

VIC visitor numbers were static compared to last year, although there is a broad range of performance individually. Phone calls were down, but emails up generally compared to last year.

VICs Comparison October 2010/11

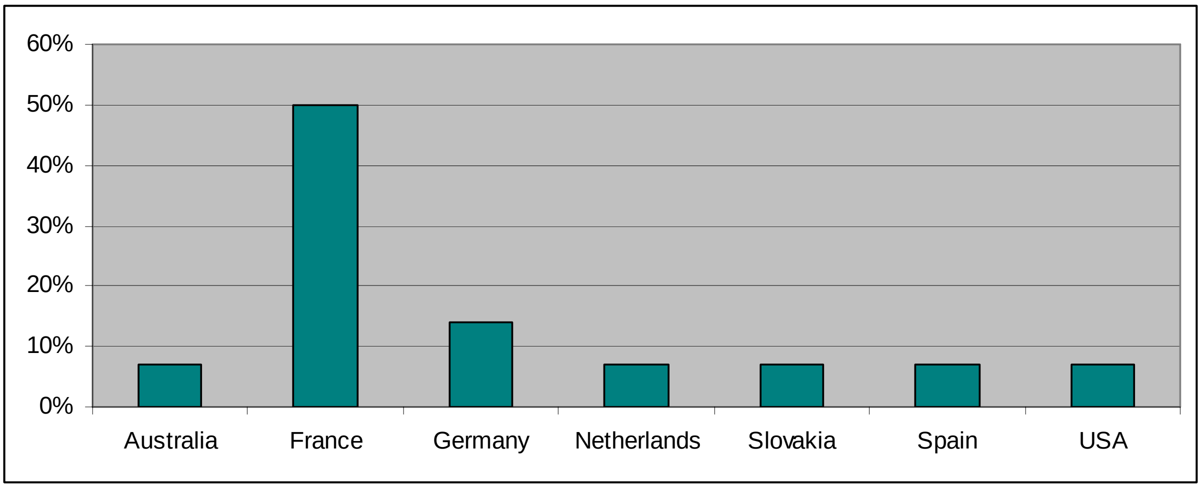
Name of VIC	Footfall 2011	Footfall 2010	% change	Phone Calls 2011	Phone Calls 2010	Emails 2011	Emails 2010
Ashford	660	1081	-39	108	220	317	318
Canterbury	27955	29764	-6	800	708	266	160
Deal	1900	1426	33	75	100	337	178
DFH&RM	0	0	n/a	448	653	339	189
Dover	9724	9838	-1	465	537	566	665
Faversham	1449	1370	6	103	107	71	88
Gravesend	2286	2617	-13	197	299	475	345
Maidstone	5543	6083	-9	270	351	9	36
Medway	17316	18566	-7	397	568	231	352
Royal T. Wells	4801	2472	94	392	353	230	241
Sandwich	1862	1989	-6	47	44	24	27
Thanet	4814	2929	64	81	235	91	69
Tonbridge	1295	1357	-5	710	625	0	0
Kent	79605	79492	0.1	4093	4800	2956	2668

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 October 2010
Ashford	91	0	9	Down 11%
Canterbury	70	5	25	Down 15%
Deal	91	2	7	No change
DFH&RM	85	5	10	No figs
Dover	52	21	27	No change
Faversham	91	3	6	No change
Gravesend	90	5	5	No change
Medway	75	10	15	Down 15%
Royal T. Wells	86	3	11	Up 6%
Sandwich	99	0.25	0.75	Down 9.25%
Thanet	97	1	2	Up 2%
Tonbridge	91	0	9	Up 6%

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



Accommodation

Larger hotel serviced accommodation Occupancy

Occupancy was down 0.1% compared to October 2010, so a negligible change this month but RevPar and ADR were down showing pricing incentives attempting to stimulate demand.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
This Year	51.1	63.8	63.5	68.8	73.9	80.5	86.3	83.8	80.2	73.7
Last Year	50.0	66.3	64.2	71.5	77.4	81.2	86.0	85.7	81.3	73.7
% Change	2.3	-3.8	-1.1	-3.8	-4.4	-0.9	0.4	-2.2	-1.4	-0.1

Rooms sold divided by rooms available multiplied by 100. Occupancy is always expressed as a percentage of rooms occupied.

Average Daily Rate (ADR)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
This year	49.16	50.51	50.89	49.05	50.29	52.45	62.70	53.16	52.46	49.96
Last year	48.89	50.19	50.59	50.04	50.98	52.62	55.07	53.45	53.80	52.65
Percent change	0.6	0.6	0.6	-2.0	-1.4	-0.3	13.8	-0.5	-2.5	-5.1

Room revenue divided by rooms sold, displayed as the average rental rate for a single room.

RevPar

.	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
This year	25.13	32.24	32.30	33.77	37.18	42.24	54.14	44.57	42.07	36.80
Last year	24.44	33.29	32.47	35.79	39.44	42.75	47.38	45.80	43.76	38.83
Percent change	2.8	-3.2	-0.5	-5.7	-5.7	-1.2	14.3	-2.7	-3.9	-5.2

Room revenue divided by rooms available

Smaller hotels, guest houses and B&Bs

Occupancy was up 7.8% in October 2011 compared to October 2010, with occupancy in seaside areas being particularly strong compared to 2010 and 2009. This may be due to late bookings in the excellent weather. All business types did better this month than last year.

Year on year % occupancy comparison Kent

Kent Occupancy	October 2009	October 2010	October 2011
	58.10	52.61	60.42

% Occupancy according to location

Location	2009	2010	2011
Seaside	49.51	37.72	56.54
Large town/city	66.23	68.37	69.13
Small town	61.87	65.77	41.20
Countryside/village	52.19	49.73	55.35

% Occupancy according to business type

Location	2009	2010	2011
Bed and Breakfast	51.15	42.22	56.05
Guest House	47.17	58.96	62.78
Hotel/Inn	59.68	58.59	61.94

Conference and Event

Conference business fell by 23% compared to last October and events are shorter in length with lower delegate rates compared to last October.

Average length of conferences held

Length of conference	Half a day	1 day	2 days	3 days +
% of conferences held Oct 2011	61%	32%	3%	4%
% of conferences held Oct 2010	49%	46%	4%	2%

The average tariff ranges of venues participating

Tariff range	% of venues within this range October 2010	% of venues within this range October 2011
£17 and under	Not known	23%
£18 to £25	27%	33%
£26 to £30	37%	22%
£31 to £40	18%	11%
£41 to £50	9%	0%
£51 or more	9%	11%

Origin of conference delegates

	Kent	London	UK	Overseas
Oct 2011	89	4	6	1
Oct 2010	79	10	9	2

Visit Kent News

Visit Kent Research update

The research team is currently working on the event impact online toolkit with its SusTRIP (Interreg Two Seas Programme) partners which should be available by mid 2012. The aim of the toolkit is to provide small and medium event organizers with the tools and guidance to be able not only to evaluate their events and their economic impact, but also to plan more sustainable events taking environmental and social issues into consideration. The toolkit will be designed to be clear and easy to complete and user-friendly.

In addition to this, consultants are also working on our behalf to consolidate our understanding of the accommodation product in Kent in the lead up to the Olympics. This involves recruiting to the occupancy survey RIBOS (www.RIBOS.co.uk/kent) for all accommodation types, self catering, camping and caravan site research to improve understanding of this sector and identify opportunities for development, and a hotel study. Please can we take this opportunity to thank all the Districts, accommodation providers and other stakeholders who have assisted us in our various pieces of research over the last year in these respects. Your assistance has been invaluable.

Visit Kent Websites

Visits to the Visit Kent consumer website rose 64% compared to last October, with page views up by 69%.

Consumer website www.visitkent.co.uk.

October 2009 visits	October 2010 visits	October 2011 visits
164,849	142,843	233,664

Visits to the B2B website were up by 28% and page views up by 26%.

B2B website www.visitkentbusiness.co.uk

October 2009 unique visits	October 2010 unique visits	October 2011 Unique visits
1,339	1,235	1,582

Visit Kent Marketing

The 2FOR1 campaign (ran in partnership with Southeastern, Stagecoach and Arriva) continued during October, with a particular push around the half term holidays. We hosted the first in our series of Master Classes on the subject of PR at the Shepherd Neame Brewery in Faversham. Some key journalists presented on their particular areas of expertise and the delegates all left armed with some useful hints and tips on gaining more PR exposure for their businesses. Four press visits were welcomed from the UK and near European markets, including The Daily Express and the French publication, Figaroscope. We attended the 4 day consumer exhibition, CountryFair, in Belgium and VisitBritain's International Business exchange where we discussed plans with VisitBritain's domestic and overseas teams around 2012 marketing, PR and trade opportunities. A wide range of tour operators and group travel organisers from Belgium were met at Travel the Workshop to ensure the Kent product remains a feature in tour programmes for 2012 and beyond. We are well underway with the commission of our new consumer website (due for launch in January 2012) and will be making an announcement about our new supplier at the beginning of December.

Other News

England Occupancy Survey – September

Excluding STR data in both the Kent and England figures, room occupancy for England was an average of 72% and for Kent 71%, so Kent was about average for the month.

- Across England as a whole, room occupancy witnessed a slight increase compared with the levels achieved in September 2010, whilst bed occupancy levels remained static with the previous year.
- Weekday room and bed occupancy levels during September 2011 were slightly above the September 2010 levels. Weekend room occupancy was on a par with the levels witnessed during the same period last year with bed occupancy levels slightly below those achieved in September 2010.
- Room and bed occupancy levels in the Guesthouse and B&B categories in September 2011 had increased slightly on the levels achieved during the same period last year. Hotel room occupancy levels remained static with the levels achieved during September 2010 whilst bed occupancy levels witnessed a slight decrease on levels achieved during September 2010.

•Small town and Countryside locations witnessed a slight increase in room occupancy levels compared with September 2010, with levels in seaside locations and city/large towns decreasing slightly. Bed occupancy levels in small town locations also increased on the levels achieved during September 2010, with countryside locations remaining static with the levels achieved during the same period last year. Seaside and city/large town locations witnessed a decrease in bed occupancy levels compared with the September 2010 levels.

•Room occupancy levels in the 4-10, 11-25 and 100+ size bands had increased compared with September 2010 percentages and levels remained static in the 51-100 category. Bed occupancy levels increased in the 4-10 and 100+ size bands and remained static in the 11-25 size band.

The most recent England occupancy survey for September 2011 can be found here

http://www.visitengland.org/Images/September%202011%20Final%20Graphs%20for%20EOS%20Reporting%20excluding%20regional_tcm30-28862.pdf

VisitEngland Attractions' Monitor - Autumn

Fairly good autumn visitor numbers

- The accommodation industry has had a reasonably good autumn. About one in three (32%) businesses report increased visitors compared to the same period last year, and about two in five (42%) report the same level.
- Visitor numbers are not quite as positive as this time last year however, when about two in five (39%) businesses increased their visitor numbers on the previous autumn.

Warm weather has helped caravan parks and seaside businesses

- The caravan sector has enjoyed a particularly good period, with about two in five (38%) businesses increasing their visitors. Warm autumn weather appears to have helped greatly. Presumably for the same reason, businesses in seaside locations have enjoyed a good autumn, with about two in five (39%) increasing their visitors.

Bookings down for the remainder of the year

- About one in six (17%) businesses which are open say that bookings for the remainder of the year are 'better than normal' but a third (34%) say bookings are 'not as good as normal'. However, the increased tendency to book last minute means that operators are generally not too concerned about advance bookings being down.

Confident outlook for 2012

- Confidence for 2012 is quite high, with just under a quarter (22%) of operators saying they are 'very confident' and nearly two thirds (63%) saying they are 'fairly confident'.

Slight increase in online booking facilities

- About two in five (42%) businesses offer immediate online booking; this is slightly higher than in May 2010 (38%) when the question was previously asked. The largest increase is in self catering, where one in three (33%) offer online booking now compared to just one in six (17%) in May 2010.

- The hotel sector still has by far the greatest online booking presence of any sector, with about three in four (76%) businesses offering it.

- Indications that online booking facility results in better performance

- There are indications in most sectors that the businesses which offer immediate online booking have performed the best in 2011 compared to 2010, and that those with a website have performed better than those without one. Over two in five (44%) businesses which offer immediate online booking have increased their year to date visitor numbers in 2011, compared to one in three (33%) businesses which do not offer online booking.

Telephone bookings still the most popular method with customers overall

- In spite of online booking facilities and email correspondence giving customers methods of booking that they didn't used to have, picking up the phone still appears to be the most popular booking method overall with customers. This is even the case in the hotel sector in spite of most (76%) businesses offering online booking.

The full report can be found on:
http://www.visitengland.org/Images/VisitEngland%20Business%20Confidence%20Monitor%20Autumn%202011_tcm30-28850.pdf

VisitBritain Trends Update (no 162)

- IATA figures show international air travel increased at an annual rate of 4.6% in October, with European carriers outperforming the global picture with growth of 6.4%
- BAA's six UK airports handled 1.3% fewer passengers in October than the year before – the first decline for seven months – the sharpest drop was in domestic traffic with a

decline of 9.9%, whereas scheduled European traffic rose 1.2%, that across the North Atlantic increased by 1.1%, while passenger volumes on other long-haul routes fell 0.8%

- Figures from TRI Hospitality Consulting show that in October London chain hotel occupancy declined from 87.9% a year ago to 85.5%, though with average room rates up from £131.56 to £134.34. Outside London occupancy increased fractionally from 73.5% to 73.6% while average room rates fell from £69.48 to £69.40

VisitEngland Attractions Monitor Q3

•Visit admissions in England again increased in Q3, up by +2% year-on-year, although this rate of increase was lower than the previous two quarters of the year. A weaker August (visits up less than 0.5%) restricted growth. For Kent, the Q3 quarterly growth was only 0.5% compared to Q3 last year.

•There was a notable geographical divide, with attractions in the North seeing visits decline overall, but attractions in the Midlands and South (particularly Eastern areas) performing above average in terms of visits. Coastal attractions (-2%) saw visits decrease.

•Increases in visits appear to have been driven for many attractions by visitors from the immediate locality. There are perceptions that visitors from overseas have generally declined.

•In line with slowing rates of visit increases, views of Q3 business performance also softened. This was exacerbated by an overall feeling of continued pressure upon visitor spend and other revenue streams. However, attractions are generally satisfied with their performance in the context of the current testing economic market conditions.

Full details can be found at:
http://www.visitengland.org/Images/2011%20Q3%20Report%20v1_tcm30-29025.pdf

VisitEngland, latest travel news stories

The global Travel & Tourism industry will grow more slowly in 2011 and 2012 than previously anticipated, the World Travel & Tourism Council (WTTC) announced. The WTTC forecast earlier in spring this year growth of 4.5% in 2011, followed by 5.1% in 2012, but following deterioration in global financial conditions, the eurozone debt crisis and the threat of a return to recession in the US, it now believes travel and tourism will grow only 3.2% and 3.3% in 2011 and 2012. *Source: Travel Mole*

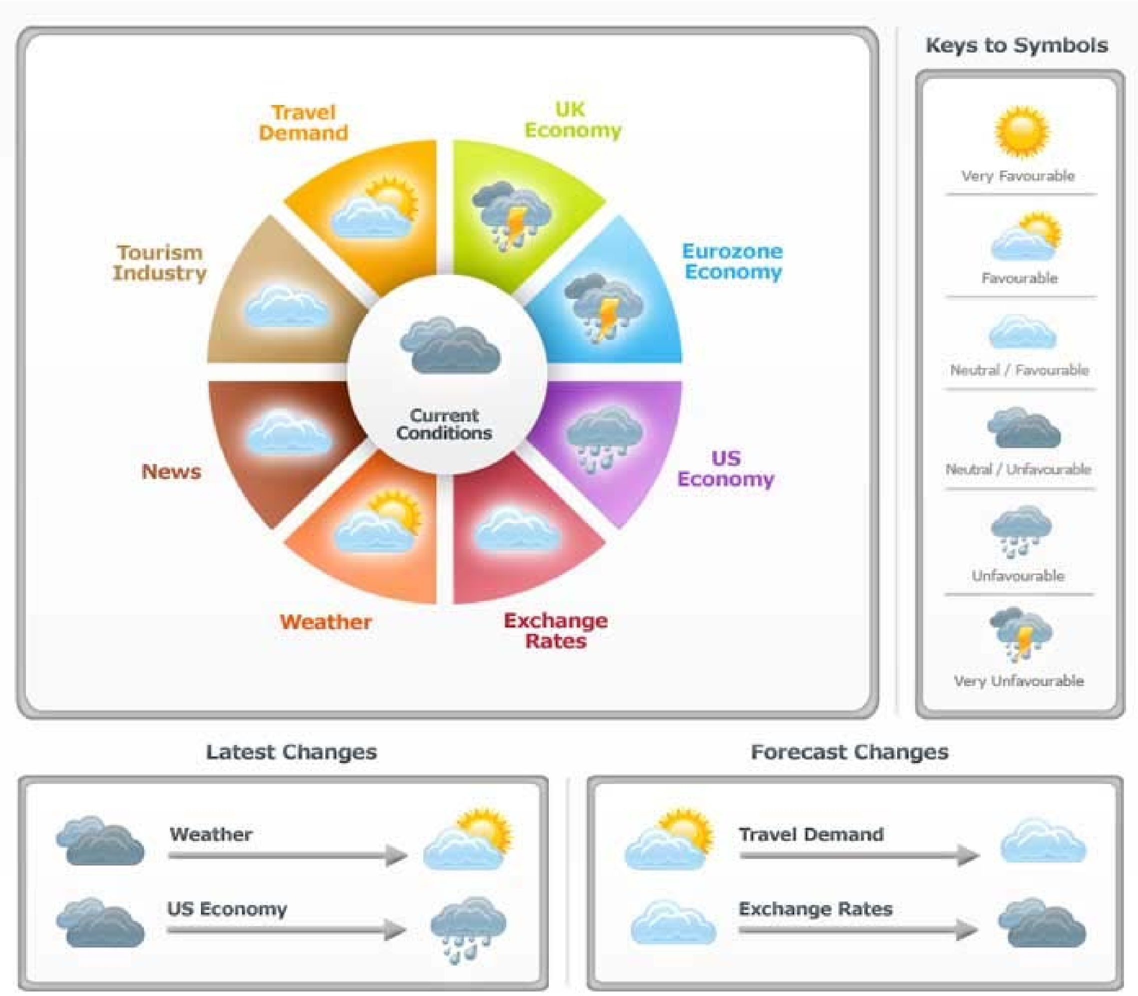
Research by laterooms.com has found that 66% of people prefer taking short breaks on a regular basis than one long break. The research revealed that 86% of us are now taking short breaks on a regular basis throughout the year, with a getaway every three months named by two thirds of people (66%) as being necessary for de-stressing.
Source: Travel Mole

VisitEngland and the British Beer & Pub Association have launched an online access statement tool, which provides detailed guidance on the information that may be required by people with access needs when visiting a pub. The tool can be found at: www.visitengland.org/accessstatements *Source: VisitEngland and Caterersearch*

For other recent news stories relating to the tourism industry copy and paste this link into your browser.
http://www.visitengland.org/Images/News%20Stories%20November%202011_tcm30-29086.pdf

BBC Weather

According to the BBC, the month began with a southerly airstream resulting in some exceptionally high temperatures, reaching 25-28 °C widely in England and Wales. The mean temperature was 2.0 °C above the 1971-2000 average, resulting in provisionally the warmest October since 2006 and the eighth warmest in the last 100 years. A maximum temperature of 29.9 °C was recorded at Gravesend (Kent) on the 1st, provisionally the highest UK temperature on record for October



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