



Visit Kent's Business Barometer September 2010

Accommodation returned to its 2008 occupancy levels, and showed strong signs of an improved year compared to 2009. Attractions are running at 3% down compared to 2009 which is in line with national figures. Business Tourism has improved since last year, but is starting to feel the effects of public sector cuts.

Comparison September 2009/2010

Attraction visitor numbers	Down 5%
TIC Visitor Numbers	Down 10%
Cross Channel Passengers	Up 3%
Business Tourism	Up 18%
Serviced Accommodation Smaller hotel, B&B and Guesthouses	Up 5%
Serviced Accommodation Larger Hotel Accommodation Occupancy for June <small>Source 2010 STR GLOBAL Ltd</small>	Up 10%

Topline Summary

- Carriers reported a strong end of summer 2010, in particular for car crossings.
- Larger hotels not only reported a strong month with a 10% increase in occupancy, but also a 4.2% increase in occupancy for the rolling year to date, compared to 2009.
- Smaller serviced accommodation returned to its 2008 occupancy level in September, a 4.9% rise from September 2009
- Business Tourism rose 18%, but the loss of public sector conference bookings is proving to be an issue for some venues.
- After the main season, attractions remained 3% down on 2009 overall.
- Urban attractions fared better than rural or coastal this month with a rise in visitor numbers of 7%, and museums in particular did well.



Attractions

Kent visitor numbers in September

Visitor numbers	2010	2009	% change
	273,664	287,445	Down 5%

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
Jan	98,955	81,026	Down 18%	98,955	81,026	Down 18%
Feb	143,756	126,612	Down 12%	242,711	207,638	Down 14%
Mar	231,633	216,473	Down 7%	474,344	424,111	Down 11%
Apr	429,492	438,581	Up 2%	903,836	862,692	Down 5%
May	404,413	359,436	Down 11%	1,308,249	1,222,128	Down 7%
June	373,958	399,201	Up 7%	1,682,207	1,621,329	Down 4%
July	412,685	426,321	Up 3%	2,094,892	2,047,650	Down 2%
Aug	613,521	585,205	Down 5%	2,708,413	2,632,855	Down 3%
Sep	287,445	273,664	Down 5%	2,995,858	2,906,519	Down 3%

Range of performance amongst attractions overall

Attractions ranged from 38% down to 45% up. 13 attractions were down, 10 were up.

Performance according to attraction type, % change September 09/10

Historic Building/ Heritage Attraction	Museum	Other
Down 2%	Up 19%	Down 19%



Performance according to cost % change Sep 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
Up 11%	Down 15%	Down 16%	Up 13%	Down 3%

Performance according to cost % change Sep 09/10

Charging	Free
Down 5%	Up 20%

Performance according to location, % change Sep 09/10

Coastal	Rural	Urban
Down 5%	Down 14%	Up 7%

Factors affecting visitor attraction results

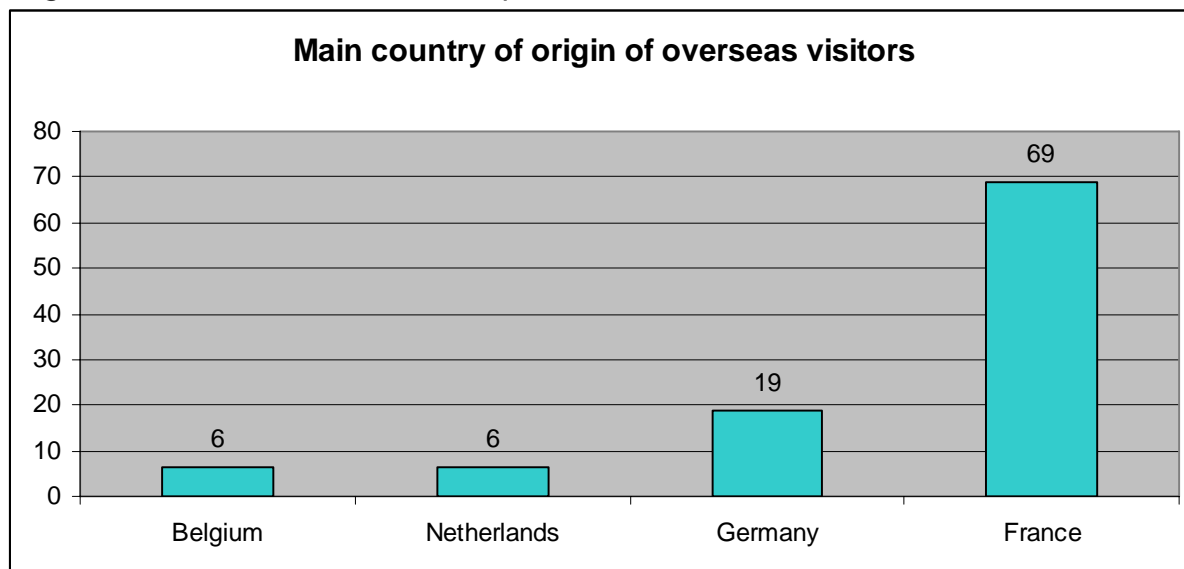
Positive
Special event fell this month rather than August as last year
Good events and promotion
Continuing good performance across the board, but especially near continent and domestic.
Leaflets
More visitors in the area generally
More volunteers
Improved weather
Exchange rate

Negative
Large event in September last year which did not take place this year
Economy
Reduction in groups
Delays in opening of extension
Road works
Weak group numbers



Overseas visitors to attractions in September

81% of visitors in September were of UK origin, but of the remaining 19%, 3% were long haul, and 16% were from Europe.



Accommodation

Serviced Accommodation

Smaller hotels, guest houses and B&B's

Smaller serviced accommodation returned to its 2008 occupancy level in September, a 4.9% rise from September 2009. 84% were UK guests staying an average of 1.87 days, and 16% were overseas staying an average of 2.25%.

RIBOS (www.ribos.co.uk)

Kent	Sep 2008	Sep 2009	Sep 2010
Net Room Occupancy	66.8%	62.0%	66.9%

Location	Occupancy
Countryside/village	57%
Seaside	61%
Large town/city	75%
Small town	77%

Visit Kent's **Business Barometer**

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





Larger hotels

September occupancy was strong for the larger hotels, with an increase of 10% in September 2010 compared to September 2009. Also, 2010 overall is proving to be better for occupancy generally than 2009, with a running 12 month increase of 4.2% compared to 2009

Occupancy (%)	2010								
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
This Year	49.7	64.9	59.9	71.3	76.0	78.1	86.4	82.3	80.1
Last Year	48.9	61.9	56.2	68.5	74.0	74.1	80.6	80.1	72.8
Percent Change	1.6	4.8	6.4	4.0	2.6	5.3	7.2	2.7	10.0

Occupancy %	2008	2009	2010
This Year	67.9	67.5	70.3
Last Year	67.9	67.9	67.5
Percent Change	0.1	-0.6	4.2

Source 2010 Smith Travel Research, Inc/STR Global, Ltd.

Cross Channel Carriers

These figures are the combined totals for the Port of Dover and Eurotunnel and show an average rise in passenger numbers of 3%, cars were up by 5% and coaches by 3%. Commentary is that the summer season for 2010 ended strongly.

September	2009	2010	% CHANGE
Passengers	1,065,066	1,100,573	Up 3%
Cars	296,973	312,656	Up 5%
Coaches	7,058	7,300	Up 3%

Visit Kent's Business Barometer

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





TICs

TICs Comparison September 2009/10

Name of TIC	Footfall Sep 2010	Footfall Sep 2009	% change Sep 09/10	Phone Calls Sep 2010	Phone Calls Sep 2009	Postal/emails Sep 2010	Postal/emails Sep 2009
Ashford	1194	1554	-23	163	421	268	305
Canterbury	31205	36358	-14	1051	1298	175	137
Deal	2201	1743	26	151	166	100	150
DFH&RM	0	0	n/a	950	909	294	268
Dover	12642	13171	-4	1699	1988	651	694
Faversham	2107	2249	-6	138	148	83	67
Gravesend	4392	4135	6	327	340	275	273
Maidstone	6286	6041	4	541	538	45	42
Medway	20754	24498	-15	629	648	318	438
Royal T. Wells	7440	10420	-29	707	234	228	287
Sandwich	2844	3183	-11	77	97	26	16
STOP24	1700	1081	57	0	0	0	0
Thanet	3220	4980	-35	355	286	151	17
Tonbridge	2384	1859	28	788	559	27	898

Please note that Tonbridge has had a change of structure and so the figures cannot be directly compared

Factors affecting visitor numbers to the TICs in Sep 2010

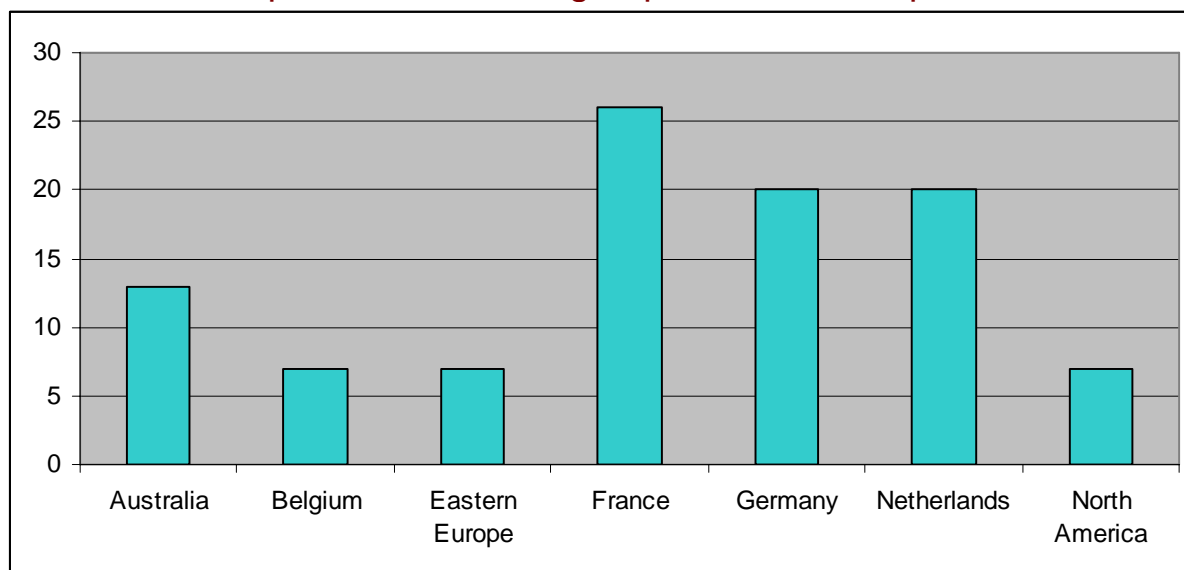
Positive Factors
Talks programme
Cruise ship port-of-call days
Heritage open days
Local event we sold tickets for
Coach trips from Germany

Negative Factors
Weather
TIC closed for emergency repairs
Economic climate
Roadworks
Weather



Nationality of TIC visitors

The top overseas visitor groups to TICs in September



Name of TIC	% Domestic Visitors	% Long Haul visitors	% European visitors	Euro visitors compared to September 2009
Ashford	80	10	10	Down 2%
Canterbury	30	20	50	Static
Deal	98	0.25	1.75	Down 13.25%
DFH&RM	90	1	9	Up 5%
Dover	52	25	23	Up 1%
Faversham	93	3	4	Up 0.5%
Gravesend	93	4	3	Up 1%
Maidstone	97.5	1	1.5	Down 0.5%
Medway	65	5	30	Down 5%
Royal T. Wells	80	5	15	Down 25%
Sandwich	86	3	11	Up 1%
Thanet	99	0.4	0.6	Static
Tonbridge	95	2	3	No data for 2009

Visit Kent's Business Barometer

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





Business Tourism

Number of events taking place

2010	2009	% change
432	365	Up 18%

Although overall a positive increase in bookings in Kent, several of the venues reported either cancellations or decreases in public sector type meetings or conference bookings. For some, prices have had to be reduced. 33% were ahead of target for this year, 33% on target, 25% behind target, and 9% had no targets.

Length of conferences

Half a day	1 day	2 days	3 days or more
18%	75%	4%	3%

Average daily delegate rate for this month

£18 to £25	8%
£26 to £30	33%
£31 to £40	50%
£41 to £50	8%
£51 or more	0%

Origin of delegates

Kent	92%
London	5%
UK	2%
Other	0%

Confidence Survey

Attractions' Confidence for the 3rd Quarter of 2010

Top three concerns for Kent attractions overall in Sep	
UK Economic climate concerns	89%
Weather concerns	56%
VAT increase concerns	50%



Attractions' performance in the last quarter compared to the same period last year	
Much better	6%
Better	11%
Slightly better	17%
About the same	22%
Slightly worse	17%
Worse	22%
Much worse	5%

Attractions' expectations for the next quarter	
Much better	6%
Better	6%
Slightly better	17%
About the same	44%
Slightly worse	22%
Worse	6%
Much worse	0%

Coach market to attractions

Coach market up	Coach market same	Coach market down
28%	44%	28%

Visit Kent News

Visit Kent Research

As part of our European SusTRIP programme, Visit Kent has recently completed a 3 month research project which highlights new and emerging communication technologies which can be sustainably used by tourism businesses.

Visit Kent Marketing

Kent Golf Campaign The Kent Golf campaign continues to gather momentum following a really successful presence at St Andrew's Open, where Kent golf was showcased to a worldwide audience. We have seen some keen interest from both domestic and international journalists and will be attending the IGTM (International Golf Travel Market) in Valencia this month, which is the principal route to the golf travel trade and appointments have been set up with some key buyers to ensure that Kent is seen as a serious golf destination long after the Open is over.



Travel Trade. The trade team have been gearing up for what is now the busiest time for the travel trade as they put to bed their brochures for 2011 and start planning for 2012. We have been visiting a lot of our key trade accounts on territory, including attending RDA in Germany, Travel!, the Workshop in Brussels and Britain Market Place in New York. Kent remains a popular destination with the trade as we are so proactive in meeting their requirements (including offering familiarisation visits, sample itineraries and images for their brochures). We have recently formed a 2012 Trade Forum to bring together our investors with key tour operators and agencies dealing specifically with the 2012 period. The first forum, held in July, was an open session for everyone to raise their concerns over how 2012 will impact business whilst the second session, held in October, focussed on the pressing issues of pricing and transport. The group will continue to meet on a regular basis.

Visit Kent Websites

The consumer website is down 5% in September, with page views down 4%.

Consumer website www.visitkent.co.uk

Visits Sep 2009	Visits Sep 2010
158,180	150,897

The B2B site is down 5% this month, although page views were up by 6%

B2B website www.visitkentbusiness.co.uk

Visits Sep 2009	Visits Sep 2010
1,341	1,275

Other News

Weather

According to the BBC, September was a changeable month and although temperatures overall were close to or above normal, there were significant variations with several warm days but also some cold nights and localised frost.

Mean temperatures were close to average. Rainfall was around less than 75% of normal in parts of south-east England. Sunshine duration was generally close to, or somewhat above, average. A maximum temperature of 24.6 °C was recorded at Gravesend (Kent) on the 22nd September.

Visit Britain – Tourism Trends

- September BAA's six UK airports handled 3.3% more passengers in September than a year ago, with Heathrow having its busiest ever September, with traffic up 7.6%.

Visit Kent's **Business Barometer**

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





- American Express's annual Global Business Travel Forecast suggests that short-haul flight prices in Europe will increase by between 4% and 9% with long-haul flight prices to/from Europe set to rise by between 5% and 9%
- Figures from TRI Hospitality Consulting for September show that London chain hotel occupancy stood at 87.0%, up from 83.5% a year ago, while occupancy in the provinces stood at 78.3% this September, up from 75.7% twelve months earlier. The average room rate in London in September was £129.63 and in the provinces £71.54
- Eurotunnel report that the number of vehicles conveyed on its shuttle service through the Channel Tunnel was 15% up on a year ago during the three months to September
- Figures from IATA show that in September international demand for air travel increased at an annual rate of 10.5%, with European carriers seeing a 8.4% rise
- British Airways announces a profit of £158m during the six months to September

International Passenger Survey (Visit Britain)

According to Visit Britain, the long-term trend is for the average length of time each inbound visitor stays in the UK to decline, however the figure has been stable for the past three years. In line with many other developed economies the UK has an international tourism balance of payments deficit. This increased both rapidly and consistently in the decade to 2008, but shrank by around 25% in 2009 as Britons took fewer overseas trips. Please see the table below for details.

Trends in inbound tourism to the UK

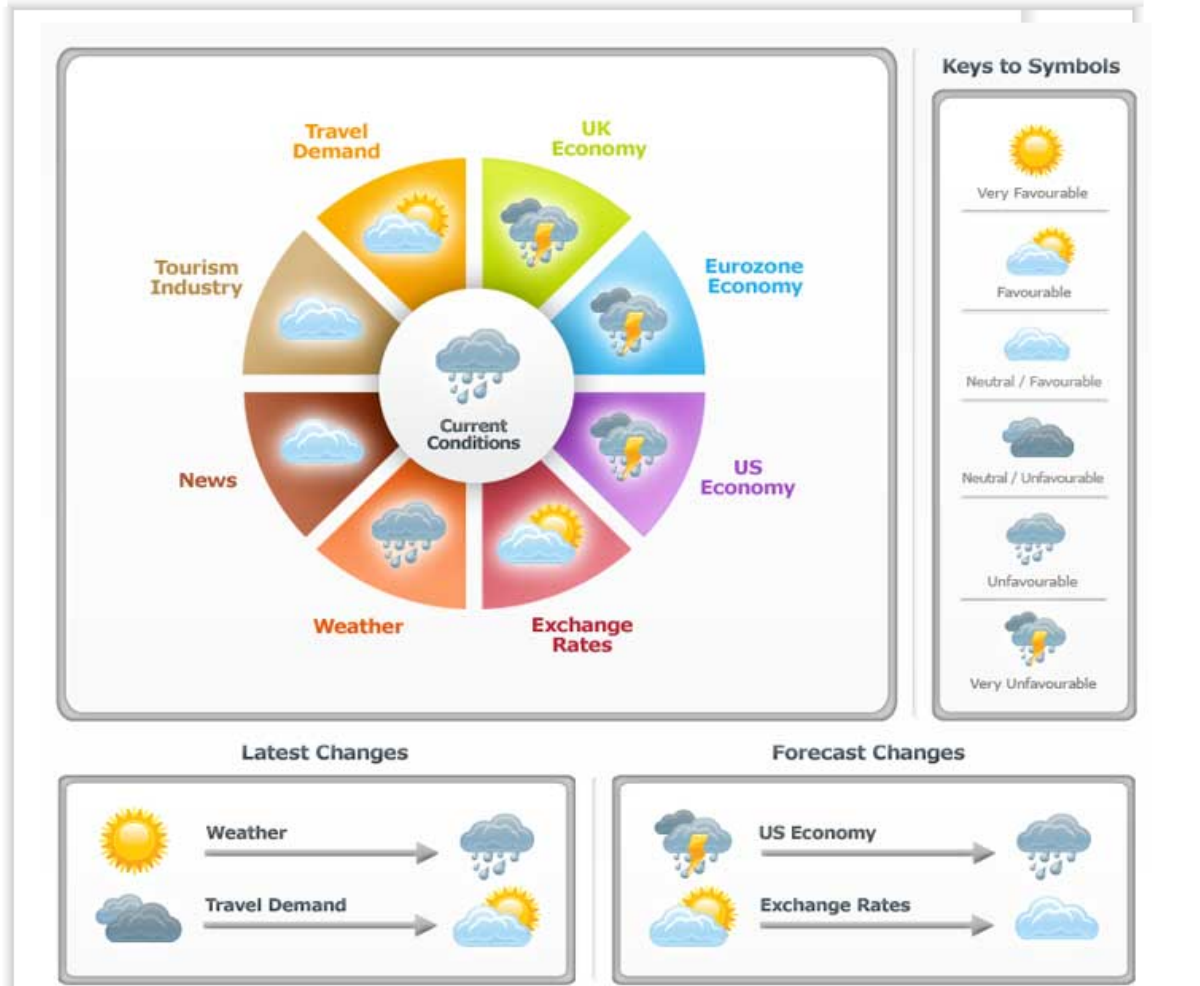
Year	Number of visits (m)	Value (£bn)	Spend per visit (£s)	Days per visit	International Balance of Payments £bn
1998	25.745	12.671	487	9.0	-6.818
1999	25.394	12.498	487	8.3	-9.522
2000	25.209	12.805	503	8.1	-11.446
2001	22.835	11.306	489	8.3	-14.026
2002	24.180	11.737	481	8.2	-15.225
2003	24.715	11.855	475	8.2	-16.695
2004	27.755	13.047	466	8.2	-17.238
2005	29.971	14.248	471	8.3	-17.906
2006	32.713	16.002	486	8.4	-18.409
2007	32.778	15.960	487	7.7	-19.053
2008	31.888	16.323	511	7.7	-20.515
2009	29.889	16.592	554	7.7	-15.102

Visit Kent's Business Barometer

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



Trends Update 137 - 20 September 2010



The Business Barometer is produced by the Research Team at Visit Kent. Contact Tracey Parker, Research Manager on 01227 812905, tracey.parker@visitkent.co.uk