Visit Kent's Business Barometer September 2011

September was a variable month for weather, but ended on a glorious note with sunny warm days making it the warmest end to September for 100 years (according to the BBC).

Comparison September 2010/2011

Attraction Visitor Numbers	Down 1.5%
VIC Visitor Numbers	No change
Cross Channel Passengers	Up 0.5%
Serviced Accommodation Smaller hotel, B&B and Guesthouses	Up 3%
Serviced Accommodation Larger Hotel Accommodation Source 2011 STR GLOBAL Ltd	Down 1.8%
Conference and Event/Business Tourism	Down 7%

Topline Summary

- Occupancy in smaller hotels, guest houses and B&B's in Kent has been steadily climbing year on year for September, rising from 66% in 2009 to 71% in 2011.
- Visit Kent fed back to the recent Kent Conference Bureau members' meeting the results for the year so far to September (see business tourism section). Conferences were up 1.6% for the year to date, Weddings up by 8%. Other leisure events were down by 22%.
- Attractions were 1.5% down for September but were up by 1.6% for the year to date. 56% of attractions feel performance this year has been better than last year. 85% of attractions feel confident about the final quarter's performance.
- VICs received the same number of visitors as last September, but post and email requests were up by 2%
- September was a very dry month for Kent, with the county receiving less than half of its usual rainfall for the month

Attractions

Kent visitor numbers in September

Visitor numbers	2010	2011	% change
	393,886	388,059	Down 1.5%

Kent visitor numbers – Year to date

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

	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%

Range of performance amongst attractions overall

40 attractions fed their figures into the Barometer this month and reported a wide range of results, 24 attractions reported a rise in visitor numbers from 1% to 60%, 1 attraction stayed the same as last year, and 13 attractions were down, ranging from 2% to 48%.

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

Gardens	Outdoor Activity Tour/Transport	Historic Building/ Heritage Attraction	Museum	Other
Up 2.5%	Up 11%	Down 2%	Up 3%	Down 3.5%

Performance according to attraction size, % change September 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 9.5%	Up 14%	Down 13%	Up 3%	Up 1.5%

Performance according to cost, % change September 2010/11

Charging	Free
Down 1.5%	Down 0.8%

Performance according to location, % change September 2010/11

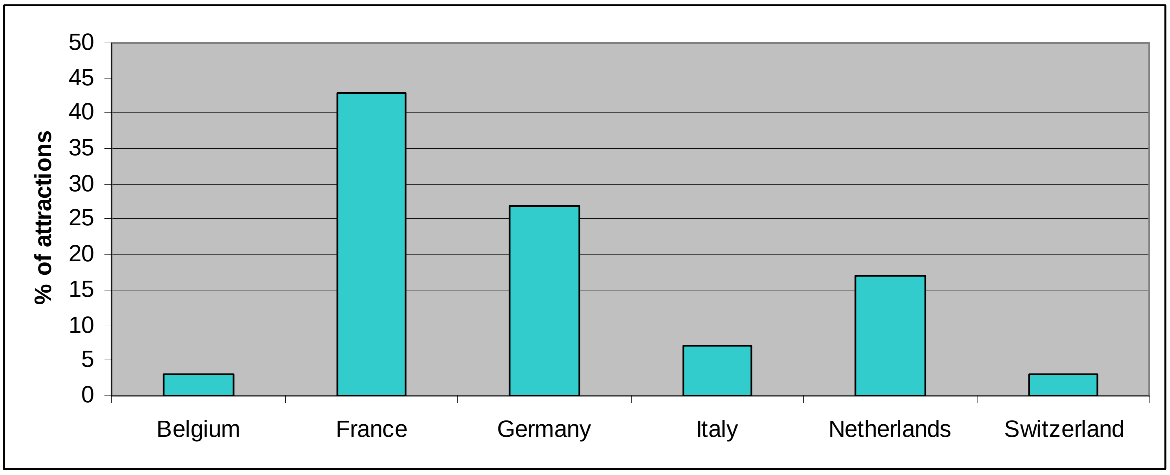
Coastal	Rural	Urban
Down 5%	Down 6%	Up 10%

Positive factors affecting visitor numbers this month
Excellent weather at the end of the month
Being free of charge
Interest in local produce
Good weather
Student numbers up
Efforts last year encouraged increased visits this year
The new Tourist Information Kiosk promoting attractions
More interest in the exhibition
Good groups market
New event
Increase in coaches
New shop area and exhibition

Negative factors affecting visitor numbers this month
Bomb scares
Oil spill on the river
Weather
Fuel costs
Ongoing works to site
Groups have dropped off slightly
Event failed but rest of month was up
Economy
Lack of volunteers
Less groups as product has changed
Last year we had a popular exhibition

Overseas visitors to attractions in September

Most visitors were from France and Germany this month.



Attractions' Confidence for the 3rd Quarter of 2011

Top three concerns for Kent attractions overall in September
Economic Climate
Increase in fuel costs
Weather

Attractions' performance in the last quarter compared to the same period last year	%
Much better (up by more than 10%)	11.8
Better (up by 5-10%)	20.6
Slightly better (Up by 1-5%)	23.5
About the same	20.6
Slightly worse (down by 1-5%)	20.6
Worse (down by 5-10%)	2.9
Much worse (down by more than 10%)	0.0

Attractions' expectations for the next quarter	%
Much better (up by more than 10%)	8.8
Better (up by 5-10%)	8.8
Slightly better (Up by 1-5%)	38.2
About the same	29.4
Slightly worse (down by 1-5%)	11.8
Worse (down by 5-10%)	2.9
Much worse (down by more than 10%)	0.0

Coach market to attractions

Coach market up	Coach market same	Coach market down
35%	38%	27%

Accommodation

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

Year on year change in monthly occupancy

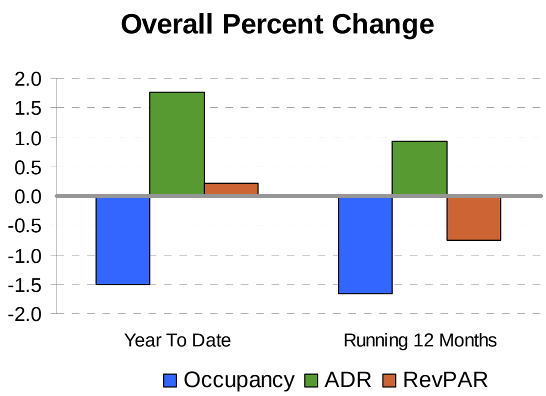
Occupancy for the larger hotels and chains in Kent fell 1.8% compared to last year, with a year to date fall of 1.5%

Year on year comparison for each month of 2011

Occupancy (%)	2011								
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
This Year	51.1	63.8	63.5	68.8	73.9	80.5	86.4	83.8	79.9
Last Year	50.0	66.3	64.2	71.5	77.4	81.0	86.0	85.7	81.3
Percent Change	2.2	-3.8	-1.1	-3.8	-4.4	-0.5	0.4	-2.2	-1.8

Year to date occupancy

Occupancy (%)	Year To Date		
	2009	2010	2011
This Year	69.8	73.7	72.6
Last Year	68.6	69.8	73.7
Percent Change	1.6	5.6	-1.5



ADR = Average Daily Rate, RevPAR = Revenue Per Available Room

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

Kent occupancy September

	Sep 2009	Sep 2010	Sep 2011
Kent	65.64	67.82	70.93

September occupancy according to location

Location	2009	2010	2011
Seaside	62.66	61.05	66.82
Large town/city	73.29	77.72	79.45
Small town	64.44	77.89	61.75
Countryside/village	60.92	59.62	57.81

September occupancy according to business type

Location	2009	2010	2011
Bed and Breakfast	62.73	60.70	68.43
Guest House	58.07	57.87	72.76
Hotel/Inn	66.73	77.29	71.96

VICs

VICs Comparison September 2010/11

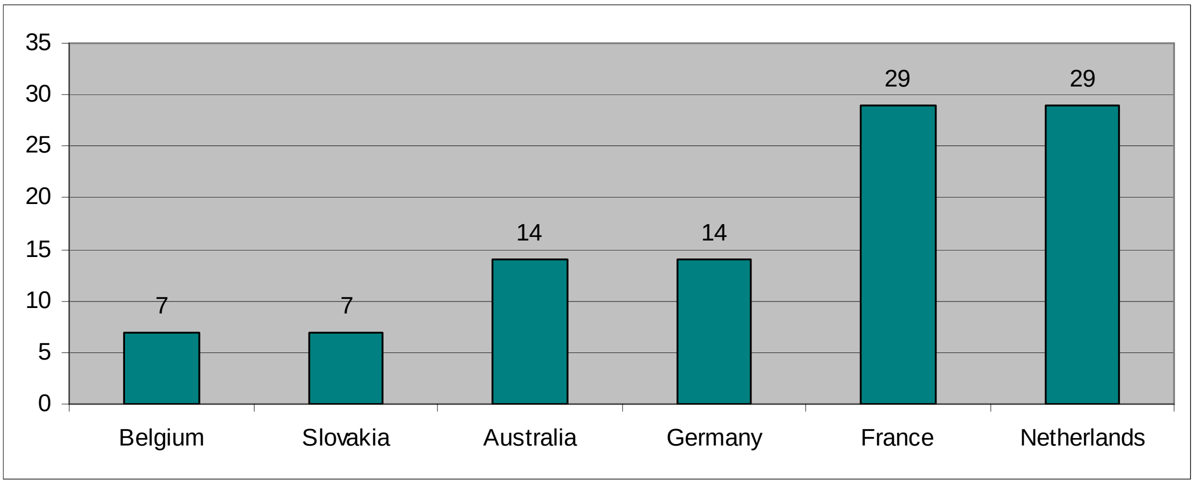
VIC visitor numbers were stable overall , but individually there was a wide range of performance

Name of VIC	Footfall Sep 2011	Footfall Sep 2010	% change Sep 10/11	Phone Calls Sep 2011	Phone Calls Sep 2010	Postal/ emails Sep 2011	Postal/ emails Sep 2010
Ashford	684	1194	-43	117	163	325	268
Canterbury	32111	31205	3	711	1051	249	175
Deal	1901	1208	57	108	151	74	69
DFH&RM	0	0	n/a	764	950	376	294
Dover	12856	12642	2	1433	1699	573	651
Faversham	2280	2107	8	155	138	69	83
Gravesend	2486	4392	-43	246	327	351	275
Maidstone	4199	6286	-33	398	541	26	45
Medway	18743	20754	-10	456	629	307	415
Royal T Wells	5921	7440	-20	707	707	274	228
Sandwich	3211	2844	13	82	77	15	26
Thanet	7844	3220	144	130	355	87	151
Tonbridge	2384	1168	104	681	788	0	0
Kent	94620	94460	0.17	5988	7576	2726	2680

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

The top overseas visitor groups to VICs in September (%)



Nationality of VIC visitors

Name of VIC	% Domestic Visitors	% Long Haul visitors	% European visitors	Euro visitors compared to September 2010
Ashford	92	2	6	Down 4%
Canterbury	50	10	40	Down 10%
Deal	95	2	3	Up 1.25%
DFH&RM	90	1	9	Static
Dover	53	24	23	Static
Faversham	89	4	7	Up 3%
Gravesend	93	3	4	Up 1%
Maidstone	98	0.5	1.5	Static
Medway	75	5	20	Down 10%
Royal T.Wells	50	10	40	Up 25%
Sandwich	90	3	7	Down 4%
Thanet	99.5	0.3	0.2	Down 0.4%
Tonbridge	95	2	3	Static

Top three concerns for Kent VICs overall in September
UK Economic Climate
Weather
Lack of promotion

VICs' Confidence for the 3rd Quarter of 2011

VIC performance in the last quarter compared to the same period last year	%
Much better (up by more than 10%)	7
Better (up by 5-10%)	0
Slightly better (Up by 1-5%)	29
About the same	29
Slightly worse (down by 1-5%)	21
Worse (down by 5-10%)	0
Much worse (down by more than 10%)	14

VIC expectations for the next quarter	%
Much better (up by more than 10%)	7
Better (up by 5-10%)	14
Slightly better (Up by 1-5%)	43
About the same	15
Slightly worse (down by 1-5%)	7
Worse (down by 5-10%)	0
Much worse (down by more than 10%)	14

Cross Channel Carriers

Channel crossings are now reported on a quarterly basis, as the figures are not now released by the carriers on a month by month basis.

Quarter 2 – July to September 2010/11 totals

	2011	2010	% change
Passengers	7,191,929	7,157,609	0.5%
Cars	1,845,303	1,871,613	-1.4%
Coaches	41,582	39,754	4.6%

Business Tourism

Business Tourism for September showed a general fall in bookings across the board. Conferences were down by 7%, weddings by 6% and other leisure events down by 39%. Reasons for weaker performance were given as less residential bookings and more day meetings, and also conference agents generally reporting a decrease in bookings, and fall in confidence.

The average tariff ranges of venues participating

Tariff range	% of venues within this range
£18 to £25	44%
£26 to £30	12.5%
£31 to £40	25%
£41 to £50	12.5%
£51 or more	6%

Average length of conferences held

Length of conference	Half a day	1 day	2 days	3 days +
% of conferences held	37%	50%	9%	5%

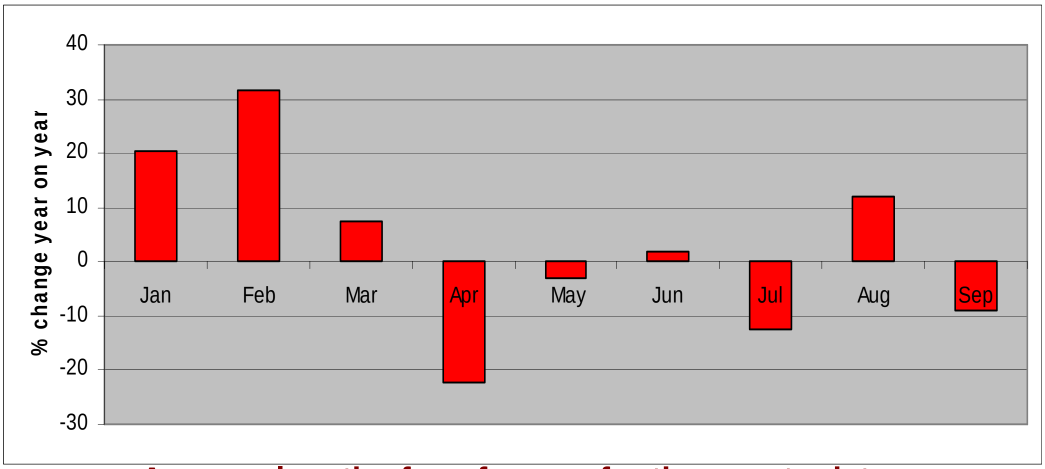
Origin of conference delegates

Kent	London	UK	Overseas
77%	10%	12%	2%

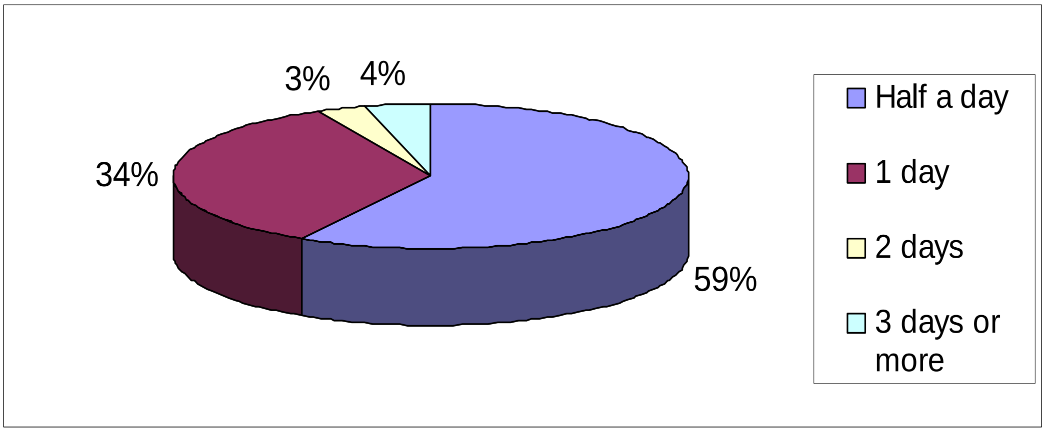
Presentation to Kent Conference Bureau on results for the year to date

Visit Kent presented the year to date conference and event data to the Kent Conference Bureau. The results from the presentation are below, but show that the Conference market is up by 1.7%, weddings 8.4%, but other events are down 22.3%

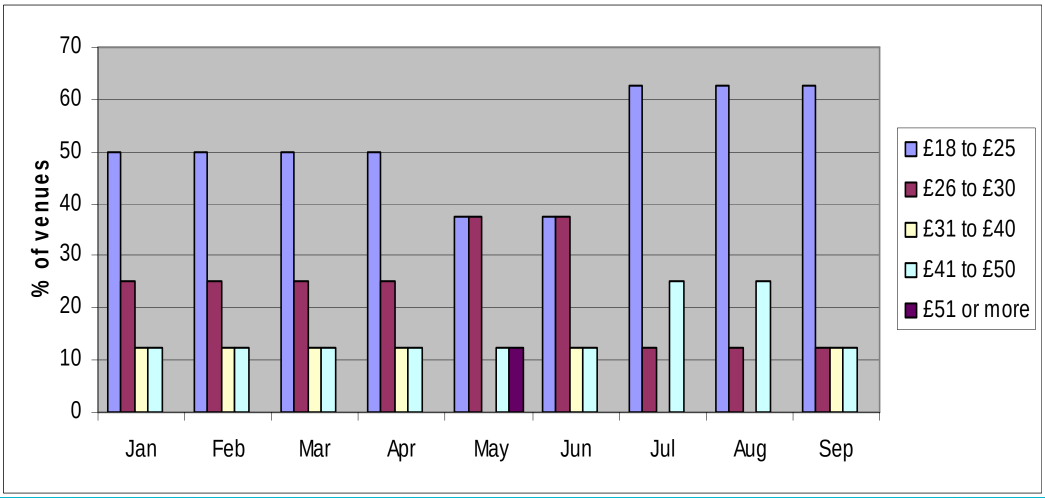
Conference % change for year to date (compared to 2010)
Up 1.7% for the year Jan to Sep 2011



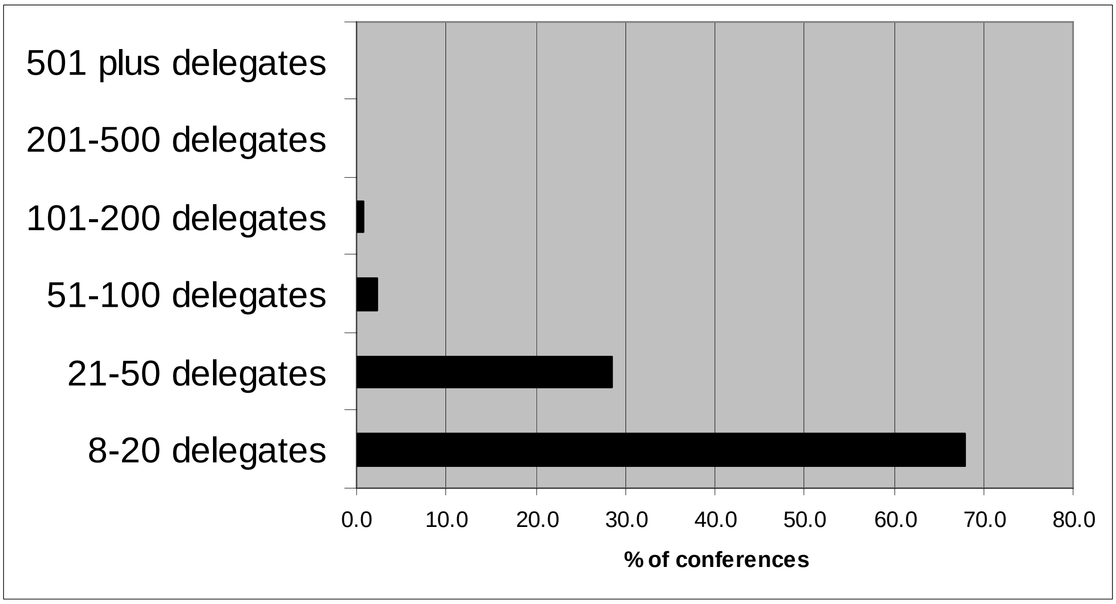
Average length of conference for the year to date



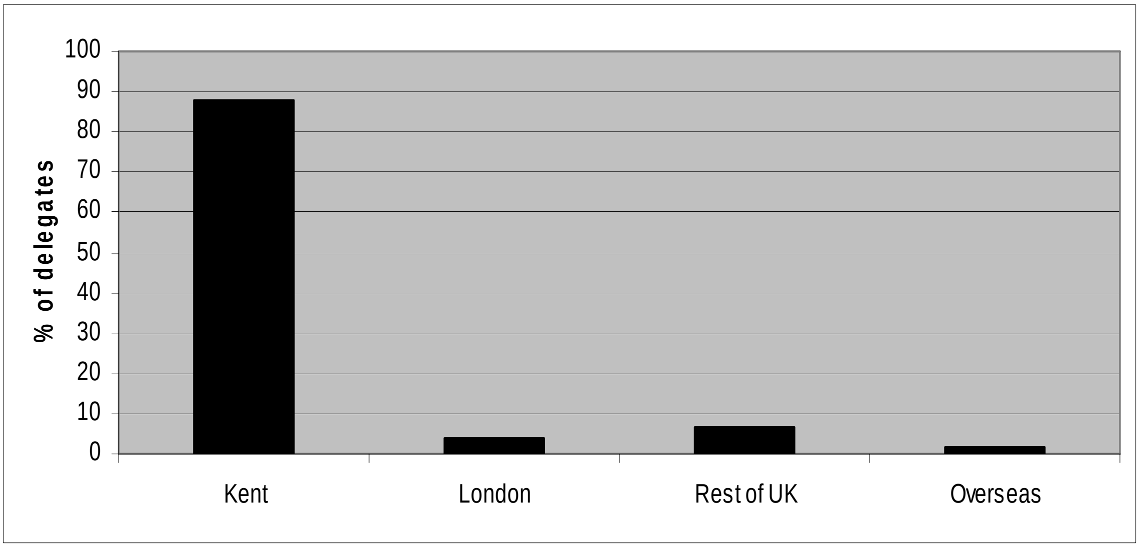
Average delegate rate for the year to date



Average size of conference



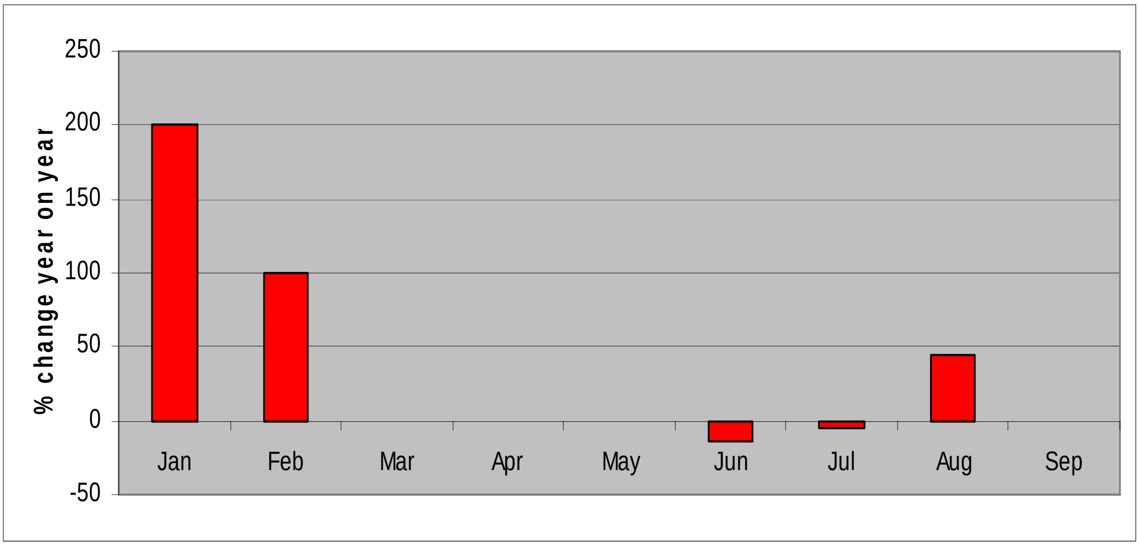
Origin of delegates



Issues affecting conference venues and their performance
"A massive decrease with KCC bookings and NHS bookings due to budget cuts"
"Business is decreasing especially for full day events. There has been a massive decline regarding KCC bookings compared to the year before"
"Other leisure event business has suffered"
"Fuel cost increases encouraged more local business"
"KCC are no longer providing food for their staff at meetings/training so our catering requirements have been reduced recently"

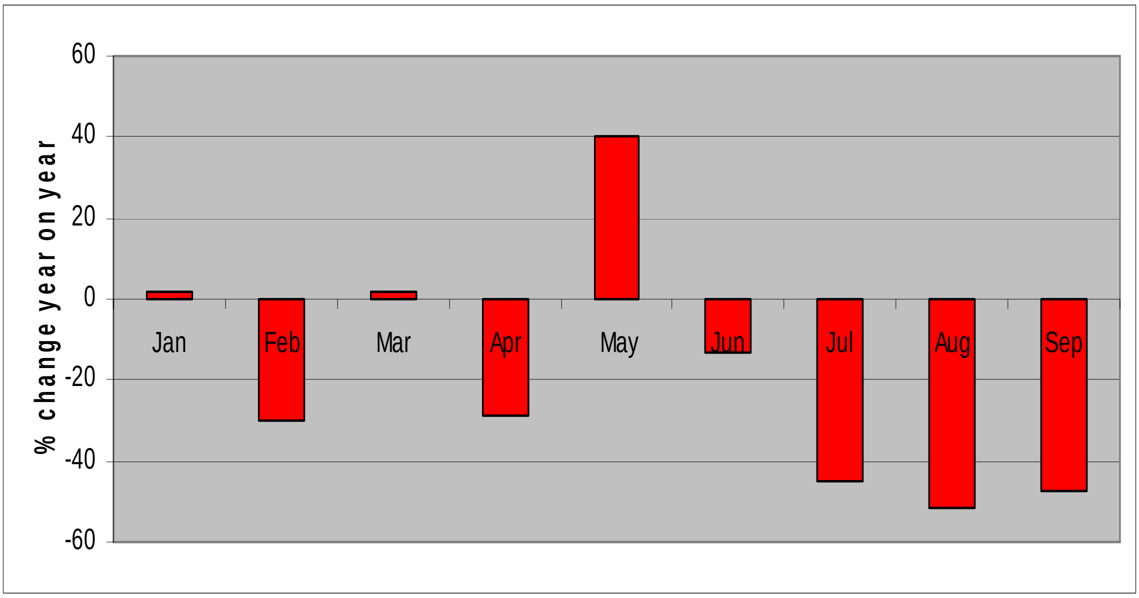
"Not very busy regarding full day conferences which involved lunch, rather 1/2 day meetings due to cut backs. One very small wedding compared to 3 big weddings last year"
"Positives were that we had 2 weddings & also a couple of parties at the hotel. Negatives we had less full day conferences than previous year, mostly 1/2 day conferences"
"Public spending cuts having an affect on catering income."
"There have been less residential conferences and more day meetings."

Weddings, % change compared to 2010
Up 8.4% for the year to date



Please note that the venues that offer weddings are currently a small sample

Other leisure events, % change compared to 2010
Down 22.3% for the year to date.



Visit Kent News

Visit Kent Research

The research team are currently working on developing the online accommodation database for self catering accommodation and hope to be able to report early in the New Year within the Barometer. Any self catering businesses that would like to be part of this research, please can you either contact Tracey Parker on tracey.parker@visitkent.co.uk or register direct on www.ribos.co.uk/kent

Visit Kent Marketing

The 2FOR1 campaign (ran in partnership with Southeastern, Stagecoach and Arriva) continued during September with a wide range of Kent attractions and accommodation offering fantastic 2FOR1 offers to encourage visitors to travel to and around Kent's venues by public transport. We welcomed five press visits from the near European markets, including one of the main German television stations, NDR, and the high end Dutch publication, Seasons. We met with over 50 key US wholesalers and tour operators at VisitBritain's Destination Britain event 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 September. We are currently working on the Visit Kent Magazine for 2012, the official destination guide for the whole of the county – if you are interested in being included in the publication please contact lynnette.crisp@visitkent.co.uk

Visit Kent Websites

Visits to the consumer website were up 28% compared to September 2010, with page views up by 42%

Consumer website www.visitkent.co.uk

Visits Sep 2009	Visits Sep 2010	Visits Sep 2011
158,180	150,897	193,859

Visits to the B2B website were up by 6% compared to September 2010, with page views up by 14%

B2B website www.visitkentbusiness.co.uk

Visits Sep 2009	Visits Sep 2010	Visits Sep 2011
1,341	1,275	1,350

Other News

Weather (BBC)

- During September the UK experienced close to average amounts of sunshine and rainfall but temperatures were well above average

International Passenger Survey – September update (Visit Britain)

- September figures are relatively positive, and bolstered by growth earlier in the year Total visits and spend so far in 2011 remain above 2010 levels at 3% and 4% respectively despite mixed figures from peak months July and August.
- At 2.53 million visitor numbers were slightly up (by 1%) on the 2.51 million visits in September 2010, but remain well below the record September 2006 which saw 3.06 million visits.
- Visitor spending in September was £1.5 billion, 7% up on the low of £1.4 billion in September 2010 (before taking account of inflation), but below the £1.6 billion spent in September 2009. Building on the record spend seen in June and July this has resulted in record earnings so far in 2011 of £13.19 billion, over £0.5 billion or 4% more than the year to date at the same point in the last two years.

For further details see the website link
http://www.visitbritain.org/Images/September%2011%20IPS%20Memo%20with%20charts_tcm29-27964.pdf

Visit Britain – Trends Update 159,160 &161

- According to IATA international air traffic increased by an annual rate of 5.6% in September, with European carriers seeing a 9.2% rise in demand
- British Airways Revenue Passenger kilometres increased by an annual rate of 6.0% in September
- The number of passengers handled at BAA's six UK airports increased at an annual rate of 1% in September; domestic traffic fell 7.2%, European scheduled increased 2.2%, North Atlantic by 3.7% and other long-haul by 3.2%
- UK consumer price inflation jumps to an annual rate of 5.2% in September

UK Brand and its performance in the 2011 Anholt GfK Roper Nations Brand Index Survey

It is encouraging to note that the UK's ranking has moved up in 2011 from 4th to 3rd for overall Nation Brand, 6th to 4th for culture, 6th to 4th for people, 13th to 12th for welcome, 5th to 4th for tourism, and 8th to 6th as a place to visit if money was no object. This is all a positive move in the lead up to the Olympics.

Measure	Rank 2011	Rank 2010	Rank 2009
Overall Nation Brand	3	4	4
Culture (overall)	4	6	4
The country has a rich cultural heritage	7	7	7
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	4	4	4
People (overall)	4	6	6
If I visited the country, the people would make me feel welcome	12	13	13
Tourism (overall)	4	5	5
Would like to visit the country if money was no object	6	8	8
The country is rich in natural beauty	22	22	24
The country is rich in historic buildings and monuments	4	4	4
The country has a vibrant city life and urban attractions	4	4	4

Source: http://www.visitbritain.org/Images/Foresight%20Issue%2096_tcm29-28346.pdf