



Photographs courtesy of Diggerland and North Foreland Lighthouse

## Visit Kent's Business Barometer January 2009

Welcome to the first Business Barometer of 2009 produced by Visit Kent's research team. Visit Kent would welcome any new contributors to any of the categories, attractions, accommodation providers, carriers or other. If you want to take part and support the Kent industry by providing us with your information, but have not yet submitted, please contact Tracey Parker on 01227 862792. We guarantee that the information is gathered and reported on a confidential basis.

### Kent Headlines - Comparison January 2008/9

Kent Attraction Visitor Numbers	- Up 7%
Serviced Accommodation Room Occupancy	- Down 8%
Kent Self Catering Unit Occupancy	- Down 2%
TIC Visitor Numbers	- Down 20%
Cross Channel Passengers Port of Dover	- Up 14%
Cross Channel Passengers Eurotunnel*	- Down 43%
(Please be aware that this is due to the fire in September)	

### Weather January 2009 (Source [www.bbc.co.uk](http://www.bbc.co.uk))

According to the BBC, the first 10 days were mostly dry but very cold with some unusually prolonged and severe frosts. Thereafter, the weather became much more unsettled with rain at times. It remained generally cold, but with some brief milder interludes. Mean temperatures were below normal, and it was the coldest January since 1997 when a mean temperature of 2.0 degrees Centigrade was recorded.

<b>England Mean Temperature Series</b>	<b>0.5 degrees below average</b>
<b>England Rainfall Series</b>	<b>101% of average rainfall</b>
<b>England Sunshine Series</b>	<b>128% of average sunshine</b>

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## Attractions January

The attractions sample is the smallest we have had due to many attractions being closed during January. 19 attractions have submitted their figures during this month, so the sample is not as reliable as other months, but still represents their collective average results.

### **Kent Visitor numbers**

<b>Visitor numbers</b>	<b>January 2008</b>	<b>January 2009</b>	<b>% Change</b>
	89,795	95,732	Up 7%

### **Range of performance amongst attractions overall**

The performance of attractions ranged from down 38% to up 52%, with 7 attractions experiencing a fall, 7 attractions experiencing a rise, and 5 attractions having similar levels to 2008.

### **Performance according to attraction type, location and cost**

Due to the size of the sample, we are unable to analyse the attractions according to these categories.

### **Reasons quoted for performance**

Good publicity  
More free events.  
5 week month  
Closed part of month for refurbishment  
30% reduction in visitors - general reduction in visitor numbers  
Possibly the weather and economic climate - we also had cheaper winter rates last year and are not doing it this year so that may have had an effect?  
Event figures good  
3% up but not aware of any reason  
Weather (snow) and economic situation  
events & exhibition during this period  
Low exchange rate for the pound

### **Origin of overseas visitors to Kent in January**

January's contributors cited France as the top group of overseas visitors followed by Holland, then Germany.

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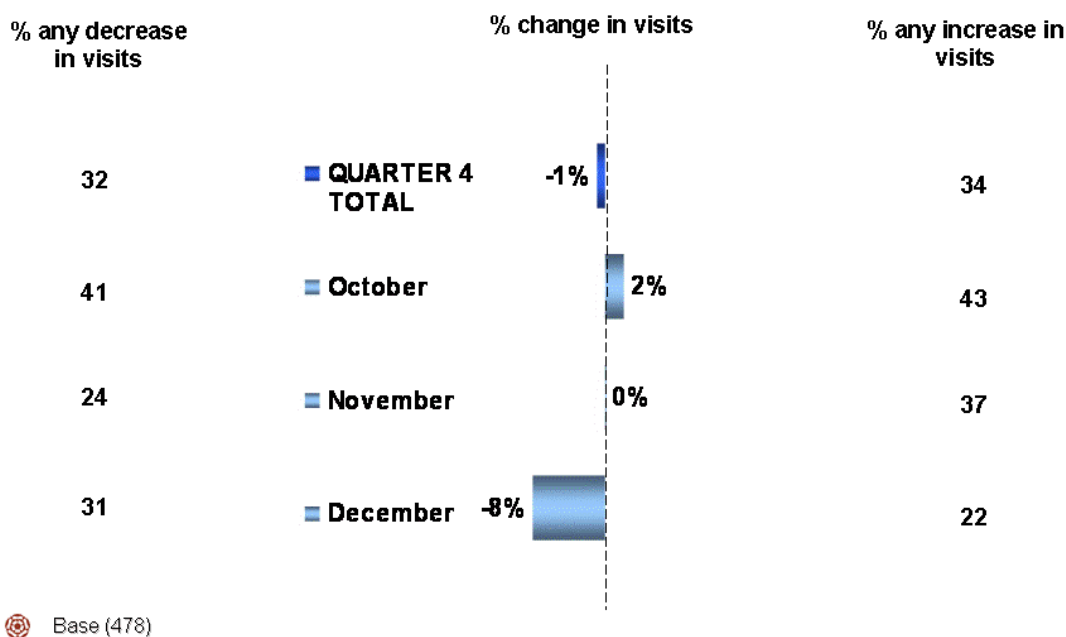
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## National Data on attractions (Source: Visit Britain)

The Quarterly Attractions Monitor for October, November and December has been released by Visit Britain and shows that nationally, overall there was a drop of 1% in visitor numbers in the final quarter of 2008. October and November were at a relative standstill, but December was particularly badly hit with an 8% drop in numbers.



These national figures compare with the Kent and South East figures as follows:

### Comparison of Kent with South East and National figures

	October	November	December	Quarter 4
<b>Kent</b>	-4%	-7%	-6%	-6%
<b>South East</b>	1%	-7%	-14%	-6%
<b>National</b>	2%	No change	-8%	-1%

Please remember that our sample is small for these three months as many of our attractions close, and are a variety of type. The national figure includes London, and many London attractions are open throughout the year, and so this will be part of the reason why our attractions do not compare so favourably during this part of the year.

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Kent's results are consistent with the South East's results, but we were faring worse than the national picture for attractions in the final quarter.

## Accommodation

Serviced accommodation in Kent continues to suffer, amongst the contributors to the Tourism South East occupancy survey.

### Serviced accommodation overall

		Room Occupancy	Bedspace Occupancy	% UK Guests	% OS Guests	Length of Stay
January	2008	40.1	24.7	90.0	10.0	1.8
January	2009	31.7	20.0	94.1	5.9	1.8
		Down 8%	Down 5%	Up 4%	Down 4%	No change

### Kent serviced accommodation January 2008/9

	% room occupancy Jan 08	% room occupancy Jan 09	% change for month January 08/09	Length of stay Jan 08	Length of stay Jan 09	Change for month
Ashford	32.4	sample too small	n/a	1.4	1.5	0.1
Canterbury	35.2	34.3	-0.9	1.7	1.5	-0.2
Dartford	no sample	no sample	n/a			
Dover	40.1	33	-7.1	1.4	1.3	-0.1
Gravesham	no sample	no sample	n/a			
Maidstone	41.9	47.4	5.5	2.1	2.3	0.2
Medway	55.9	27.2	-28.7	1.9	1.8	-0.1
Sevenoaks	sample too small	sample too small	n/a			
Shepway	21.3	24.7	3.4	1.8	1.9	0.1
Swale	37.5	37.7	0.2	2.3	2.4	0.1
Swanley	no sample	no sample	n/a			
Thanet	50.2	30.7	-19.5	2.1	2.3	0.2
Tonbridge & Malling	no sample	no sample	n/a			
Tunbridge Wells	58.7	44.7	-14	2.1	2.7	0.6
<b>KENT</b>	<b>40.10%</b>	<b>31.70%</b>	<b>-8%</b>	<b>1.8</b>	<b>1.8</b>	<b>No change</b>

The lower figure for Medway is likely to be a direct effect of the recession on the construction industry, as many construction workers have been accommodated in local hotels for the regeneration of the area, but construction (in both public and private sectors) has slowed down over the last few months. Apart from the recession, no other reason could be identified for the downturn for Tunbridge Wells and Thanet.

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## National serviced accommodation data

Source: Visit Britain

The UK Occupancy Survey for **serviced** accommodation has been updated for October and November 2008 and is available on the Visit Britain website. The Kent figures relate to the Tourism South East Accommodation survey figures updated at the end of each year to include late submissions. From this it would appear that although overall occupancy is lower in Kent, the year on year percentage change is more positive than the national picture.

### Serviced accommodation comparison October and November 07/08

	Bedspace occupancy 2008	% change 2007/8	Room occupancy 2008	% change 2007/8
<b>October National</b>	46%	4% down	63%	4% down
<b>October KENT</b>	37%	4% up	53%	5% up
<b>November National</b>	38%	5% down	55%	4% down
<b>November KENT</b>	31%	1% down	46%	2% down

## Kent self catering occupancy data

### Self-Catering occupancy comparison data January 2008/9

	Average Stay	Net unit occupancy	Average Party size	% UK residents	% Overseas residents
<b>Average January 2008</b>	11.6	40.9	2.2	71.7	28.3
<b>Average January 2009</b>	11.6	39.2	2.6	83.9	16.1
<b>Change from 08/09</b>	<b>No change</b>	<b>Down 1.7%</b>	<b>0.4 up</b>	<b>Up 12%</b>	<b>Down 12%</b>

The surge in overseas visitors to self catering occupancy tailed off in January following several very positive months at the end of 2008. However, overall unit occupancy was only slightly down at 1.7%, and average stay remained the same, and average party size was up by 0.4. Self Catering has still fared better this month than its serviced counterpart.

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## Carrier News

### Port of Dover Figures

<b>JANUARY</b>	<b>2009</b>	<b>2008</b>	<b>% CHANGE</b>
Passengers	367,665	323,083	14% up
Car	74,235	61,405	21% up
Coaches	1,988	1,655	20% up

### Eurotunnel Figures

Eurotunnel is now back and operating at full capacity, but in January it was still operating with one tunnel after the fire in September last year. The decrease in passengers of 43% reflects this reduced service, but hopefully in February Eurotunnel will start to see a return to usual passenger numbers.

## Tourist Information Centres

### Visitor Numbers

<b>TICs</b>	<b>% change 2008-9</b>
Coastal	Down 17%
Urban	Down 20%
Rural	No data
Kent overall	Down 20%

### Telephone Enquiries

<b>TICs</b>	<b>% change 2008-9</b>
Coastal	Up 9%
Urban	Down 17%
Rural	No data
Kent	Down 10%

### Postal and Email Enquiries to

<b>TICs</b>	<b>% change 2008-9</b>
Coastal	Up 11%
Urban	Up 14%
Rural	No data
Kent	Up 12%

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### Figures for individual TICs January 2008/9

Name	Footfall January 2009	Footfall January 2008	% change	Phone calls Jan 09	Phone calls Jan 08	Postal/ email enquiries Jan 2009	Postal/ email enquiries Jan 2008
Ashford	780	960	-19%	241	346	233	217
Broadstairs	200	519	-61%	25	24	n/r	n/r
Canterbury	15981	18351	-13%	1915	2454	253	235
Deal	1178	723	63%	129	83	317	351
Dover	3464	3292	5%	998	1009	1098	994
Faversham	715	821	-13%	No figs	No figs	No figs	No figs
Folkestone	n/a	n/a	n/a	566	437	194	201
Gravesend	1798	1010	78%	265	325	257	142
Maidstone	1798	6520	-72%	293	396	39	71
Margate	1910	3367	-42%	162	174	165	59
Medway	14922	16629	-10%	777	866	271	280
Ramsgate	1679	2299	-27%	94	71	35	31
Tunbridge Wells	2701	4131	-34%	417	321	474	391
Sandwich	Closed	Closed	n/a	n/a	n/a	n/a	n/a
Sevenoaks	No figs	No figs	n/a	No figs	No figs	No figs	No figs
Tonbridge	No figs	No figs	n/a	No figs	No figs	No figs	No figs

Please note that TIC at Faversham was closed for one week for refurbishment, and Tunbridge Wells TIC figures counted manually as mat counter is out of action. Maidstone TIC has changed to a stand alone facility.

The TICs put changes down to either national economic downturn, or an increase in European visitors due to the current beneficial Exchange Rate for Euros

### Nationality of TIC visitors

January 2009	% Domestic Visitors	% Long Haul Visitors	% European Visitors
Ashford	90	6	4
Broadstairs	96.5	3	0.5
Canterbury	70	5	25
Deal	95	2	3
Dover	75	10	15
Faversham	99	1	0
Folkestone	75	5	20
Gravesend	92	2	6
Maidstone	97.5	0.5	2
Margate	99.8	0.2	0
Medway VIC	85	5	10
Ramsgate	99	1	0
Tunbridge Wells	90	7	3
Sandwich	Closed	Closed	Closed
Sevenoaks	No figs	No figs	No figs
Tonbridge	No figs	No figs	No figs

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## Other News

Source Visit Britain website

Due to the prompt availability of Kent data through the Business Barometer, and the smaller sample size, we are able to report more quickly than Visit Britain on trends. However, November's International Passenger Survey reports that after a slight fall in October, domestic tourism declined more steeply in November as the economic downturn deepened. There were 6.6m overnight trips made in the UK by UK residents in November 2008, a fall of -25% from the same month in 2007 – equivalent to 2.2m fewer trips. The number of bed nights fell by -27% to 16.14 during the month. The value of overnight trips fell by -18% during November and domestic overnight trips were worth £1.16bn during the month compared with £1.41bn in November 2007.

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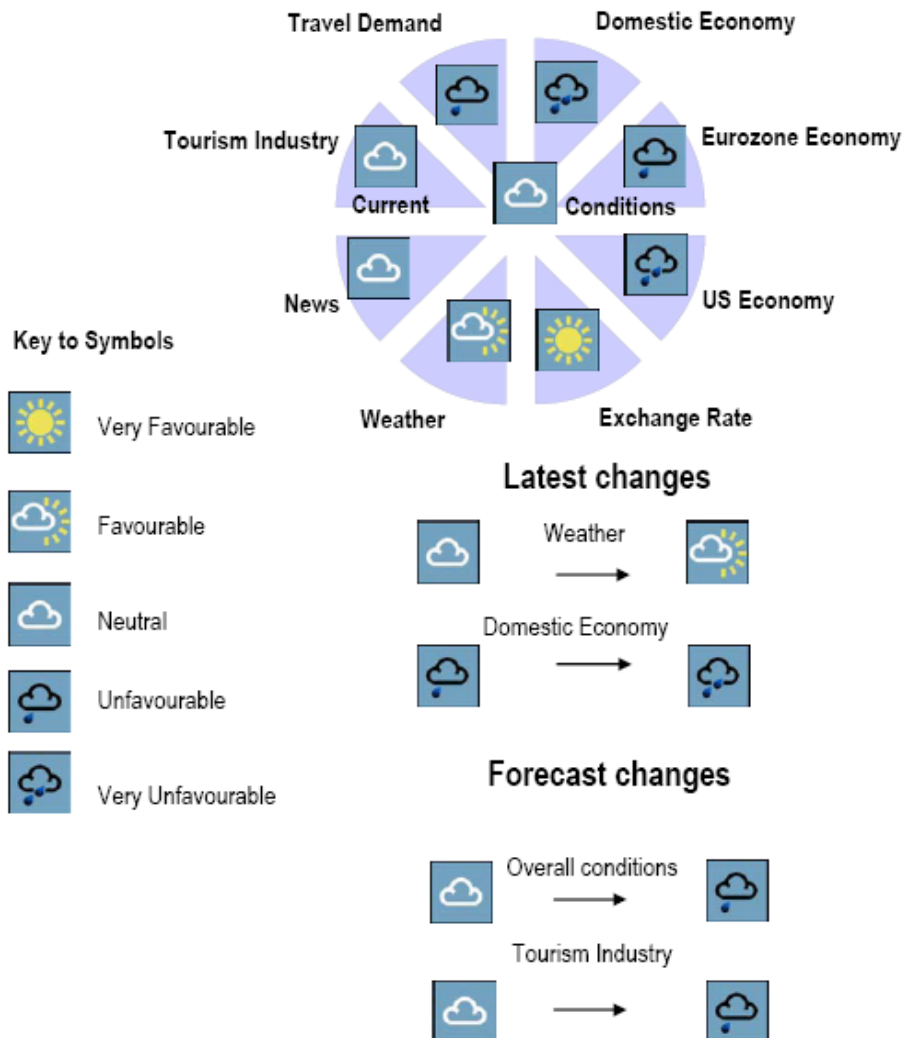


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# Factors contributing to tourism trends in Britain, January 2009



Source Visit Britain Trends Update, 29.1.09

Please direct any comments or feedback on the Business Barometer to Tracey Parker, Research Manager, Visit Kent on 01227 862792, or [tracey.parker@visitkent.co.uk](mailto:tracey.parker@visitkent.co.uk). Thank you for your continued support and feedback.

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