


With thanks to Broadstairs and Sissinghurst for our June images

Visit Kent's Business Barometer
June 2009

Welcome to the June Business Barometer produced by Visit Kent's research team. This issue celebrates one year of the new style barometer, and we would like to take this opportunity to thank our contributors over the past 12 months for their support.

Kent Headlines – Comparison June 2008/2009

Kent Attraction Visitor Numbers overall	– 9% up
Kent Serviced Accommodation Occupancy	- 2% down
Kent Self Catering Unit Occupancy Insufficient data received	- not known
TIC Visitor Numbers	- 2% down
Cross Channel Passengers	- 7% down

- Kent and Cornwall are the driest counties in the UK
- Attractions in urban areas experience 30% surge in visitor numbers.
- Attractions are confident about the next quarter's performance and 33% state that the Credit Crunch has actually had a positive effect on their business with a surge in domestic tourism.
- Over half of serviced accommodation providers are confident that July to September will see an improvement in business.
- Half of TICs believe the Credit Crunch has had a positive effect on their business and a further 31% believe it has had no effect.
- Hits to Visit Kent's website are up by 9% to 121,717 in June 2009.
- Visit Kent's Dutch, French, and German language microsites are all now up and running.

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Weather June 2009 (Source www.bbc.co.uk)

The weather is cited as a concern for all businesses in all our surveys, and so is included in each of our monthly Business Barometers. According to the BBC, June saw some of the highest temperatures of the year so far and weather watches for the heat were issued for the first time since 2006. However, some parts of the UK expereinced heavy thunderstorms which caused flash flooding; Kent and Cornwall were the driest counties in the UK during June. Temperatures on average were 1.5° up, and the South East reported temperatures at the end of the month over 30° Centigrade.

Attractions

Kent Visitor numbers

It was another strong month overall for visitors to Kent attractions with a rise of 9% compared to last year.

Visitor numbers	June 2009	June 2008	% Change
	380508	349459	Up 9%

Range of performance amongst attractions overall

Behind the overall rise of 9% there is a mixed performance. Of the 32 attractions reporting this month, 17 reported a rise in visitor figures ranging from 2% to 187%. Three attractions' figures remained static compared with last year, but 13 attractions reported a fall in visitor figures ranging from 2% to 62%.

Performance according to attraction type

Gardens	Historic Building Heritage Attraction	Museum	Zoo/ Animal Attraction	Outdoor Activity water sports	Transport or tour	Other
Up 22%	Up 18%	Down 9%	Down 22%	Down 14%	Up 46%	Down 30%

Gardens and historic buildings/heritage attractions seem to be doing very well, but the best performing category in June was the transport or tour type attraction.

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Performance according to attraction location

The mixed performance for attractions is even more evident in the analysis according to location. Attractions in urban areas fared much better in June than those in rural and coastal locations which is surprising considering the good weather.

Coastal	Rural	Urban
Down 4%	Down 5%	Up 30%

Performance according to attraction cost

Whether an attraction is free or not does not seem to influence the visitor at the moment but this does not mean value for money is not a key issue.

Charging	Free
9% up	**2% up**

Industry concerns – attractions

Although the usual top two concerns were still the economy and the weather, competition from other parts of the UK, and in fourth place 'local competition' were raised as current concerns.

Top three concerns for Kent attractions overall in June 2009
UK Economic Climate
Weather
Strength of the pound/Competition from other parts of the UK

Issues having a positive effect on business in June (as cited by Kent attractions)

The weather, being both dry and warm, meant for a number of attractions a rise in visitors. However for some outdoor attractions it was too hot, and for some other indoor attractions there was a fall in visitors.

Other reasons quoted for a positive result included plenty of volunteers available; good coach business; some good new events; the strong Euro; Staycations; good marketing; increased school group market; revised opening patterns; excellent PR coverage,

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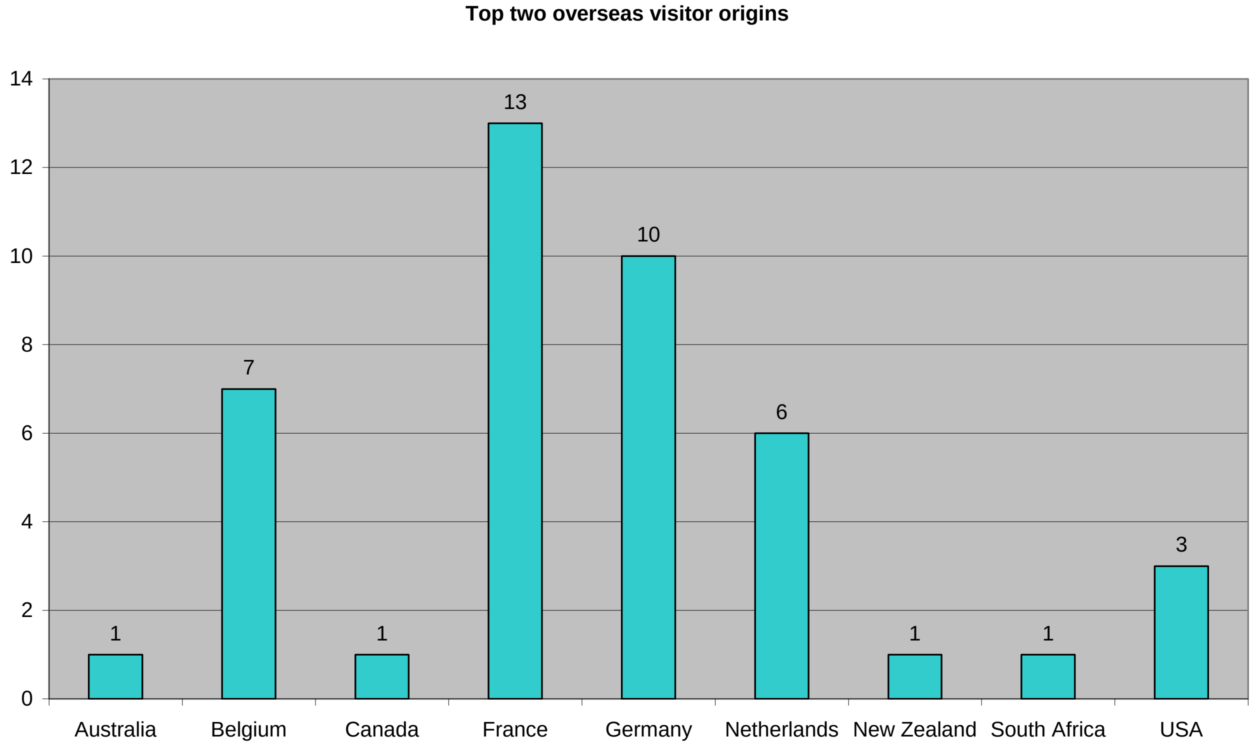
Issues having a negative effect on business in June as cited by Kent attractions

The economic climate continues to feature as a negative influence, but other reasons given are less secondary spend from visitors; lack of events; slow corporate market; the temperature was too hot for older visitors; increased costs; traffic problems; a lack of support from the local tourism association; and a lack of space in the retail area.

Overseas visitors to attractions in June

French visitors were the most often listed by attractions within their top two visitor groups, with Germany a close second.



Attractions Confidence for the 2nd quarter 2009

Confidence level predication by attractions were very accurate for April to June being very similar to the overall performance achieved

LAST QUARTER'S CONFIDENCE SURVEY – Expectations for April to June 2009

Expectations Up	Expectations Same	Expectations Down
61%	13%	26%

THIS QUARTER'S SURVEY - Estimated Performance for April to June 2009

Performance Up	Performance Same	Performance Down
60	15	25

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Confidence for the next quarter continues to be high for the next three months.

THIS QUARTER'S CONFIDENCE SURVEY – Expectations for July to Sep 2009

Expectations Up	Expectations Same	Expectations Down
60	15	25

Coach market to attractions

The coach market to attractions was faring well in the second quarter compared to the first quarter with 42% remaining the same as last year, or 39% reporting a rise. Rural locations seemed to be faring less well others, but urban attractions were doing particularly well.

LAST SURVEY Coach market 1st Quarter January to March 2009

Location	Coach Market Up	Coach Market Same	Coach Market Down
Rural	20%	50%	30%
Urban	25%	33%	42%
Coastal	Insufficient sample	Insufficient sample	Insufficient sample
Overall	22%	39%	39%

THIS SURVEY Coach Market 2nd quarter April to June 2009

Location	Coach Market Up	Coach Market Same	Coach Market Down
Rural	33%	40%	27%
Urban	50%	42%	8%
Coastal	33%	67%	0%
Overall	39%	42%	19%

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Accommodation

Kent self catering occupancy data

Unfortunately we are unable to provide you with figures at this time as we have not yet received a sufficient sample for June. We will include this in the next issue of the Business Barometer.

Kent serviced accommodation occupancy data

Serviced occupancy is slightly down this month at 2%, which is better than May. Length of stay is 0.1 days up on average. The table shows a very mixed picture across the county.

Kent serviced accommodation occupancy data June 2008/9

District serviced accomm.	% room occupancy June 2008	% room occupancy June 2009	% change for month June		Length of stay June 2008	Length of stay June 2009	Change for month June
Ashford	66.5	77.4	Up 10.9%		1.3	1.5	Up 0.2
Canterbury	67.4	54.2	Down 13.2%		1.5	1.5	No change
Dover	66.1	72.0	Up 5.9%		1.3	1.1	Down 0.2
Maidstone	66.3	59.7	Down 6.6%		2.2	2.3	Up 0.1
Medway	79.0	31.8	Down 47.2%		2.2	1.8	Down 0.4
Sevenoaks	70.1	Too small	n/a		2.0	Too small	n/a
Shepway	53.4	62.0	Up 8.6%		2.0	2.5	Up 0.5
Swale	61.2	48.3	Down 12.6%		2.5	1.9	Down 0.6
Thanet	46.6	46.8	Up 0.2%		2.1	No data	n/a
Tonbridge & Malling	No data	No data	No data		No data	No data	No data
Tunbridge Wells	67.9	68.5	Up 0.6%		1.8	1.5	Down 0.3
Kent average overall	61.8	60.1	Down 1.7%		1.8	1.9	Up 0.1

Please note that for Sevenoaks data from 2008 is not confirmed and that Tonbridge and Malling do not submit figures to the Business Barometer

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Accommodation Confidence Survey April to June 2009

Top three concerns for Kent accommodation overall in June 2009
The Economic Climate
Strength of the pound/Exchange rates
Weather/Competition from other parts of the UK

LAST QUARTER'S CONFIDENCE SURVEY – Expectations for April to June 2009

The reported performance for April to June shows that performance was perhaps slightly better than expected, as 6% of providers, business was better than expected.

Expectations up	Expectations same	Expectations down
37%	26%	37%

THIS QUARTER'S SURVEY - Estimated Performance for April to June 2009

Performance up	Performance same	Performance down
43%	24%	33%

THIS SURVEY Expectations for July to Sep 09

The survey indicates a more positive attitude to the coming quarter of July to September, and over half of accommodation providers anticipate business will improve during this time.

Expectations up	Expectations same	Expectations down
52%	20%	28%

Positive factors affecting accommodation providers in June

The responses from accommodation providers about positive influences were that the exchange rate is favouring more European travellers, low mortgage rates mean more disposable income, special offers are available, business bookings are increasing, there are strong midweek corporate bookings, more UK guests are booking for later in the season e.g. September, good promotional techniques have been introduced and groups are booking more repeat visits

Negative factors affecting accommodation providers in June

The responses from accommodation providers were cited as the strength of the pound and the UK economy, a much reduced grey market, one business cited Swine Flu, local

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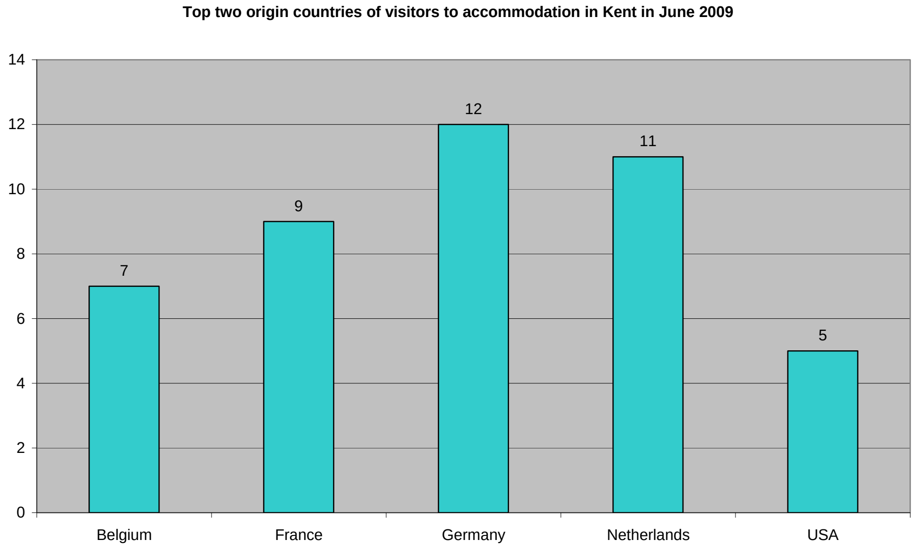
competition, reduction in business booking, UK is not perceived as a favourable destination, spend on food and drink has dropped, and energy prices.

Overseas visitors to Kent accommodation in June 2009

Accommodation providers were asked to identify the nationality of their guests, and as can be seen from below, visitors from Germany and the Netherlands were the top visiting nations to accommodation in Kent in June. Overseas occupancy rates varied from 1% to 95%, with 81% of providers having overseas occupancy of 50%.



Carrier News

The Carrier figures represent the totals of the Port of Dover and Eurotunnel combined and show that June was not a good month for channel crossings with an overall drop of 7% in passenger numbers.

JUNE	2008	2009	% CHANGE
Passengers	1,311,699	1,216,531	Down 7%
Cars	310,668	284,408	Down 8%
Coaches	12,221	11,156	Down 9%

Tourist Information Centres

Please note that each of the TICs monitors its visitor numbers and stats in a slightly different manner, and so the 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).

Visitor numbers at Kent TICs – June 2009

The next three tables show how TIC changes in visitor numbers, telephone enquiries, and postal/email enquiries compare year on year across coastal, rural and urban areas

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Visitor Numbers

TICs	% change 2008-9
Coastal	Up 14%
Rural	Up 20%
Urban	Down 9%
Kent overall	Down 2%

Telephone Enquiries

TICs	% change 2008-9
Coastal	Up 27%
Rural	Up 12%
Urban	Down 3%
Kent	Up 8%

Postal and Email Enquiries to

TICs	% change 2008-9
Coastal	Up 8%
Rural	Down 26%
Urban	Up 16%
Kent	Up 12%

Figures for individual TICs June 08/09

Name	Footfall June 2009	Footfall June 2008	% change June 08/09	Phone calls June 2009	Phone calls for June 2008	Postal/email enquiries June 2009	Postal/email enquiries June 2008
Ashford	1329	1244	**Up 7%**	479	478	266	175
Broadstairs	1484	1639	**Down 9%**	72	92	0	0
Canterbury	33825	36841	**Down 8%**	2523	2814	173	247
Deal	1632	1605	**Up 2%**	147	167	79	101
DFH&RM	0	0	**n/a**	958	860	273	243
Dover	13056	11175	**Up 17%**	2897	2582	1780	1699
Faversham	1667	1701	**Down 2%**	111	0	87	0
Gravesend	3134	2672	**Up 17%**	397	435	277	335
Maidstone	5007	6740	**Down 26%**	390	687	61	83
Margate	4767	4201	**Up 13%**	620	44	53	93
Medway	25138	29666	**Down 15%**	889	1008	508	397
Ramsgate	4272	3193	**Up 34%**	262	260	49	9
Royal Tunbridge Wells	9036	9044	**n/a**	617	425	310	289
Sandwich	2965	2470	**Up 20%**	111	99	14	19
STOP24	1651	0	**n/a**	0	0	0	0

Maidstone TIC has changed its organisational structure between 2008 and 2009 and so accurate comparison is not possible. No figures were submitted for Tonbridge and Malling.

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Factors affecting visitor numbers to the TICs in June 09

The TICs gave the following reasons for changes in their visitor numbers; the economy, excellent weather and a series of well attended events, the exchange rate, change of structure within TIC; more Belgian and Dutch visitors than the last couple of years;and quite a few Hungarian groups.

Nationality of TIC visitors

June 2009	% Domestic Visitors	% Long Haul Visitors	% European Visitors
Ashford TIC	84	4	12
Broadstairs	90	2	8
Canterbury	25	15	60
Deal	60	5	35
DFH&RM	90	2	8
Dover	55	15	30
Faversham	7	2	5
Gravesend	96	2	2
Maidstone Visitor Information	98	1	1
Margate	98	1	1
Medway VIC	60	5	35
Ramsgate	96	1	3
Royal Tunbridge Wells	50	10	40
Sandwich	90	2	8
STOP24	No figs	No figs	No figs

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Hot Topic – The Credit Crunch

Thank you to all our contributors for their completion of the additional questions from Tourism South East. We have forwarded the results on to TSE, but detail below the Kent picture for your information.

Question - What impact has the credit crunch had on the running of your business or the behaviour of your customers over the January to June period?

	Attractions	Accommodation	TICs
Negative	27%	48%	19%
Positive	33%	14%	50%
No impact	40%	38%	31%

Question – If the impact is negative, has your business been affected in any of the given areas?

	Attractions	Accommodation	TIC's
Reduced numbers of visitors/guests	78%	70%	33%
Reduced levels of visitor spend	67%	30%	100%
Cancelled bookings	22%	40%	0
Fewer enquiries generally	33%	80%	100%
Fewer advanced bookings	22%	70%	67%
Increased business costs	22%	40%	0
Decreased number of staff	11%	30%	0
Cashflow problems	0	20%	0
Difficulties accessing finance	0	20%	0
Bank loans renegotiated	0	0	0
Other	11%	0	0

Question – If the impact is positive, please provide examples of the positive impacts your business has experienced during this period

Attractions
Domestic visitors are choosing days out rather than their annual holiday
High season ticket sales are up 25%
Increased visitors as more stay at home
See us as a treat in tough times
High membership numbers, and staying at home to use their membership
Accommodation
Busier, people changing from hotels to B & B for better value for money
Low interest rates a definite bonus. Longer and more 'Short Breaks' during the Spring - exchange rate definitely benefiting our business.
An increase in leisure spend on rooms, food and drink.
TICs

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More visitors asking for ways to get the best value from their stay.
More visitors taking UK breaks instead of holidays abroad
Retail sales have increased
More domestic visitors, taking day or short break trips
Increase in British staying in UK and FRA/BEL 'Daytrippers' keen to take advantage of Euro
More visitors having holidays in UK instead of abroad
We seem to be hearing that more visitors coming in saying they're spending their holidays in UK
Increased numbers

Question – do you expect to be affected by the Credit Crunch before long?

	Yes	No	Don't know
Attractions	23%	23%	54%
Accommodation	0%	38%	62%
TICs	20%	0%	80%

Question – Have you taken any of the following actions to counter the effect of the Credit Crunch?

	Attractions	Accommodation	TIC's
Developed website/invested in search engines	27%	33%	13%
Identified niche markets	15%	24%	13%
Increased marketing/ advertising spend	30%	29%	0
Increase press/PR coverage	52%	10%	25%
Increasing efforts to encourage repeat business	42%	43%	38%
Invested in facitilies	15%	43%	25%
Offered special deals/promotions	42%	57%	25%
Reduced business/operating costs	15%	24%	19%
Reduced prices	3%	38%	25%
Reduced staffing levels	3%	19%	25%
Bank loans renegotiated	0	0	0
Targeted new customers	33%	29%	25%
Targeted previous customers	33%	38%	31%
Introduced new efficiency measures	18%	24%	13%
Nothing	21%	10%	44%
Other	6%	0	0

Question – Has the Credit Crunch made you look more carefully at your money and the way it is spent on your business?

	Attractions	Accommodation	TICs
Yes	64%	76%	75%
No	36%	24%	25%

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Question – If yes, have you save money as a result of this?

	Attractions	Accommodation	TICs
Yes	76%	50%	58%
No	24%	50%	42%

Question – Have you noticed any unusual trends emerging because of the credit crunch? These can be positive or negative. (Tick as many as apply)

	Attractions	Accommodation	TICs
Yes, visitors are bringing picnics and not using the restaurants	33%		
Yes, visitors are staying longer at the attraction	6%		
Yes, guests are booking shorter stays		43%	6%
Yes, fewer guests are using the restaurant		10%	
Yes, fewer guests using other facilities e.g. spa/beauty		0%	
Yes, fewer visitors are browsing in the shop			6%
Yes, fewer visitors are making purchases in the shop			31%
Yes, other unusual trends	18%	10%	6%
No ,no unusual trends	52%	52%	56%

Other unusual trends for attractions were cited as visitors spending less, a fall in visitors from Belgium, and visitors using vouchers in 2 for 1 deals.

Other unusual trends for accommodation were cited as guests booking much closer to their arrival date; corporate businesses using 3rd party websites much more in an effort to book a better rate; guests looking to negotiate rates rather than accept the rates quoted looking for added value; trying to renegotiate on arrival, and not going to breakfast to save money.

There were no unusual trends cited by TICs.

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Queston – if there was one single change that could be made to help your business, what would it be?

Changes desired by Kent Attractions were:

Requiring external action	Requiring internal action
More corporate bookings	Permanent member of staff
Lower visa costs.	Increase investment in site and spend more on marketing
Exchange rate - go into euro	Large marketing campaign/PR campaign
Better promotion of the South east tourism facilities especially in Thanet	More promotional spend
Improve public transport	Help make us cheaper to visit - whilst covering our costs
Good weather throughout the summer/	Be able to open our new extension asap
Annual parish council support	Investment in improving car parks and adding new facilities
For media providers to charge lower rates/offer more incentives for advertising during this time	Reduce prices with good promotions.
Improved public transport	Better location
Improved public transport from London	When we become an independent trust
Reduction in utility costs	Better advertising
Promoting of all tourism attractions in Dover area (as a whole)	Fabulous New restaurant and we are getting it next year
Knock out local competition and good weather!!	
Tourist Board increase domestic promotion & highlight quality/value for money rather than discounts	
Great weather throughout the summer holidays	
Reduce alcohol tax	

Change desired by Accommodation providers were:

Improve public transport
Less interference from government bodies eg fire authorities, local council, etc in word red tape (two words?)
Better marketing for the rural sector
Investment in and the regeneration of Dover town centre and seafront
Lower taxation
Room extension
Easier road directions to various places en route
Increased awareness of the hotel locally

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More upbeat media news!
Change of government
Greater confidence within the economy
Reduce duty on Drink
The weather!
No more duty increases for 1 year
Re-open our tourist information centre
Reduction in overhead costs

Change desired by TICs

High street location.
Funding from statutory bodies.
Access to more funding.
Refurbishment
More Destination marketing spend
More money in our budget to help with operating costs and equipment
Some stability and commitment to a future, even short term
More assistance from district and county councils

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Visit Kent News

Visit Kent Research

VISIT KENT has won its bid to lead a new €3m European Sustainable Tourism Research and Intelligence Partnership. Known as SusTrip, the initiative aims to enable similar areas in different countries across Europe to work together to develop their visitor economies, share research initiatives and build market intelligence. The programme will identify new opportunities to develop sustainable tourism in Kent, with best practice shared with partners in Lille, France, West Flanders in Belgium and a university in The Netherlands.

The first meeting of the partners was held in the Bell Hotel in Sandwich on 24th July to discuss plans for the next three years. The research will be shared across the four partner countries through an online databank and forum. Details of the programme are available from Visit Kent's research team.

Visit Kent Marketing

Visit Kent's London campaign launched in July, the joint campaign with Southeastern targets the London market with hundreds of 2FOR1 offers on Kent attractions for the first time, accommodation and food and drink. The campaign is supported by an above the line marketing campaign including London Underground advertising, Heart London radio, a campaign website – www.visitkentbytrain.co.uk and PR.

Visit Kent's European campaign targets the markets of France, The Netherlands, Germany and Belgium. The campaign includes dedicated travel trade, PR and exhibition opportunities, along with working with some on territory specialists across the key markets to advise on market conditions.

2009 has seen Visit Kent's VIP campaign enter its second year. The campaign targets the both the domestic market and the US market and continues to build on the "Begin your Adventure" work. New for the 2009/10 campaign, and hot on the heels of the success of the Coach Tourism Council Conference in Kent, the campaign will include the introduction of some dedicated trade activity with the domestic travel trade

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Stats to date, January to July 2009

Domestic Press Trips	6
European Press Trips	19
Exhibitions attended	6
Familiarisation Trips	12

Visit Kent Website

Since the beginning of 2009, Visit Kent has launched a Dutch, French and German microsite for www.visitkent.co.uk, and built on the information contained on its B2B website www.visitkentbusiness.co.uk .

The number of visitors to the Visit Kent consumer website gives an indication of the level of interest in Kent on the web. For the June comparison 2008/9 there has been a 9% rise in visitors to the site.

Visitors to www.visitkent.co.uk

June 2008	June 2009
111,151	121,717

8127 visitors have used the B2B website www.visitkentbusiness since its inception in December with 27,718 page views, an average of 3.4 pages per visitor.

Other News

Swine Flu

Visit Britain is currently undertaking research on the impacts of Swine Flu in tourism, and in our Business Barometer survey for July in Kent we have included some Swine Flu questions to identify its impact this summer in Kent. The results of both surveys will be included in our July Barometer.

Visit Britain Trends Update

- British Airways carried 3.8% fewer passengers in June than a year ago, though premium traffic declined by 14.9%; the largest declines in traffic were on Asia Pacific routes with a fall of 15%
- According to PKF UK regional hotel occupancy fell from 74.2% in May 2008 to 70.1% this year, with yield per available room declining 14.4%, while in London occupancy increased from 81% to 82.1% with yield per
- available room 6.4% down

National Data on attractions (Source International Passenger Survey)

The most recent International Passenger Survey for May shows an 8% fall in visitors for incoming visitors with US visitors and European visitors outside the European Union most affected.

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	MAY		3 MONTHS TO MAY		YEAR-TO-DATE		TWELVE MONTHS TO MAY	
	Visits	% change	Visits	% change	Visits	% change	Visits	% change
	(000)	09/08	(000)	09/08	(000)	09/08	(000)	09/08
North America	320	-20	860	-18	1,230	-19	3,520	-20
EU15	1,620	-9	4,740	-4	7,140	-5	17,920	-4
A12	190	-42	660	-29	1,020	-31	2,860	-14
Rest of Europe	150	-18	480	-9	707	-16	1,910	-7
Rest of World	330	-5	820	-10	1,340	-15	4,180	-10
Total Visits	2,610	-14	7,560	-9	11,440	-12	30,390	-8
	Spend	% change	Spend	% change	Spend	% change	Spend	% change
	(£m)	09/08	(£m)	09/08	(£m)	09/08	(£m)	09/08
Total Spend	1,290	-11	3,760	-3	5,720	-3	16,135	-1

Source: International Passenger Survey, Office for National Statistics

National accommodation data - Source: Visit Britain

Due to the more prompt feedback now available from Kent businesses through our system and liaison with Tourism South East, national data will be reported retrospectively as the UK occupancy survey is not available as frequently as our local data. The figures below relate to serviced occupancy in April.

- In April 2009 UK bed space occupancy increased by 2 percentage points compared to the same month the year before (although it is important to note that in 2008 Easter fell in March while in 2009 it was April so results are not directly comparable).
- Room occupancy was the same as in April 2008
- There are some very positive signs for leisure tourism, with both seaside and country/village occupancy matching April 2007 results, though urban locations, especially larger towns/cities, are still proving less resilient to the downturn.
- There are differing trends by accommodation type/size. Guesthouses, B&Bs and smaller establishments have all seen occupancy rise since 08 (and for those with less than 10 rooms, levels are better than in 2007), while in the largest (100+) establishments, occupancy in April was down year-on-year.

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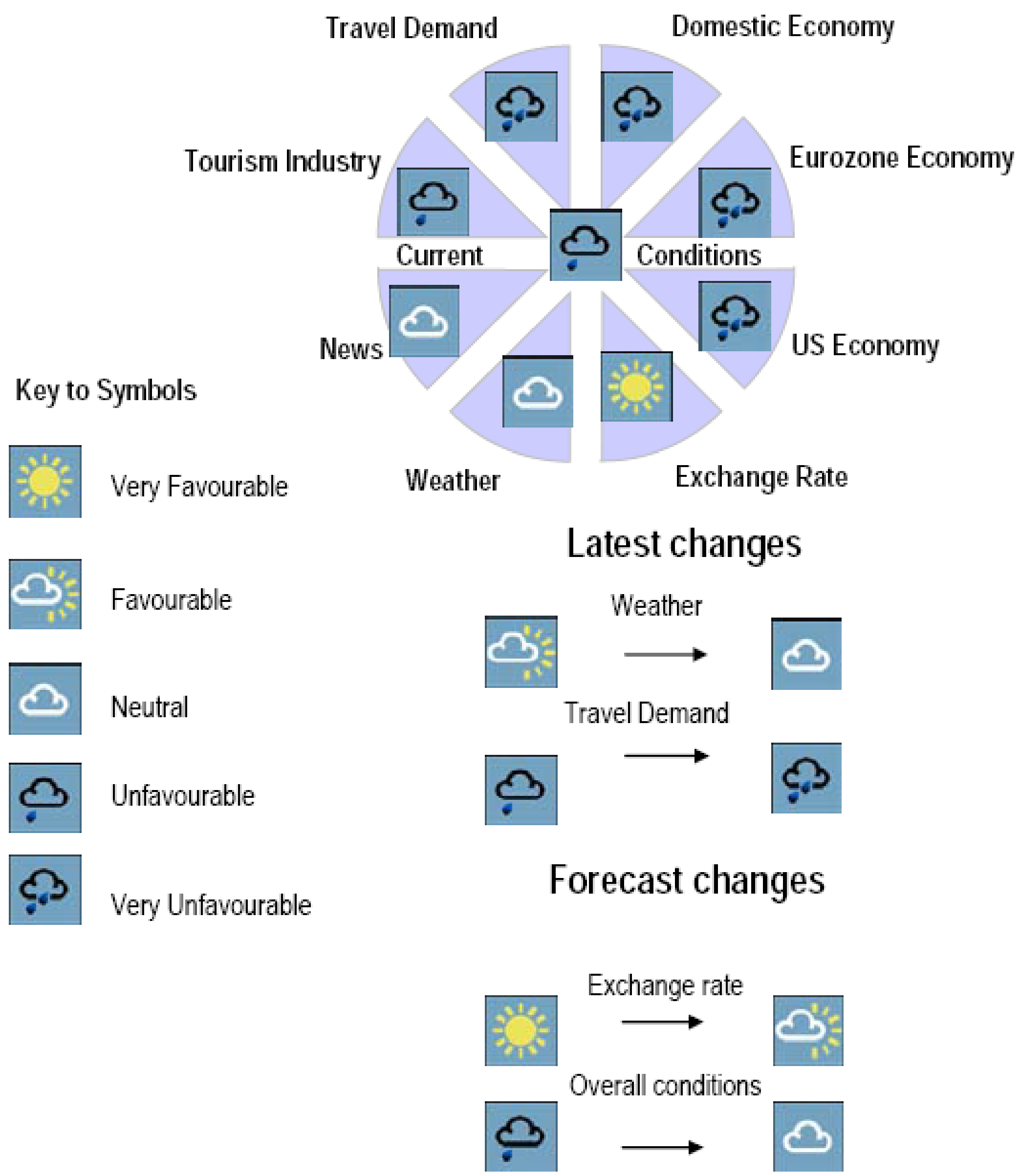
Factors contributing to tourism trends in Britain, June 2009



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