Photos courtesy of Thanet College and Canterbury College – Students involved in Visit Kent's Big Day Out, March 2009

Visit Kent's Business Barometer March 2009

Welcome to the March Business Barometer produced by Visit Kent's research team which shows positive signs of the industry maximising on opportunities in this difficult economic time.

Kent Headlines – Comparison March 2008/2009

Kent Attraction Visitor Numbers overall – Up 6%

Kent Serviced Accommodation Occupancy - Down 2%

Kent Self Catering Unit Occupancy - Up 9%
Including a 19% increase in overseas visitors compared to last March

TIC Visitor Numbers - Down 15%

Cross Channel Passengers Port of Dover - Down 16%

Cross Channel Passengers Eurotunnel - Down 38%

- The decline in Cross Channel Passengers is predominantly due to a drop in outbound which provides opportunities for Kent as more people do seem to be holidaying at home
- There has been a very positive increase in overseas visitors to Kent during March, with a 19% rise in overseas visitors staying in self catering accommodation compared with March 2008.
- Confidence for attractions is up as 61% of attractions reporting are confident about the next quarter's business performance.
- The fact attractions show a 6% increase in March without an Easter holiday falling in the month is a strong performance

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Weather March 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, the first half of the month of March was unsettled but was followed by a fine, mainly sunny week before again turning less settled and cloudier towards the end of the month. This was unfortunate for the Big Day Out on 28th March as the day was mainly rainy. However, this did not stop thousands of Kent residents going out and about enjoying the fantastic range of attractions found within Kent.

England Mean Temperature Series	1.4 degrees above average
England Rainfall Series	62% of average
England Sunshine Series	59% above average

Attractions

Kent Visitor numbers

In 2008 Easter fell in March and so positively influenced the March figures for that year. In 2009, Easter fell in April, so the benefits from this seasonal holiday will not be felt until the April figures. So it is all the more positive that many attractions have had good visitor figures in March and the actual total visitor figures for the attractions reporting show an overall 6% increase for Kent.

Visitor numbers	March 2009	March 2008	% Change
	229,804	215,604	6% Up

Range of performance amongst attractions overall

12 attractions' visitor numbers were down this month with changes year on year ranging from -100% (although not closed) to -2%. 10 attractions were up this month, with changes ranging from +4% to +170%, with 5 of these attractions experiencing rises of more than 40%. 1 attraction did not have comparable figures.

Performance according to attraction type

Gardens	Historic Building Heritage Attraction	Museum	Zoo/ Animal Attraction	Outdoor Activity water sports	Other
Too small a sample	Down 1%	Up 2%	Up 47%	Too small a sample	Up 5%

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Zoos and animal attractions have done well in March due to much better weather than last year, as weather is a key part of attracting visitors to outdoor attractions.

Museums and other attractions were up slightly, and historic buildings down but only by a marginal 1%.

Performance according to attraction location

Insufficient coastal attractions submitted this month to be able to analyse their data. However a good sample of rural and urban attractions submitted, and rural attractions have done particularly well in March at 21% up. Reasons quoted for this from the rural respondents were good weather, additional advertising and promotional material.

Coastal	Rural	Urban
Insufficient sample for location analysis	**21% up**	**3% down**

Performance according to attraction cost

Surprisingly charging attractions fared better in March, and there was a more robust sample of charging attractions than free attractions. One paying attraction put their increase in visitor numbers down specifically to the exchange rate and overseas visitors being more willing to pay.

Charging	Free
Up 7%	**Down 2%**

Industry concerns – attractions

Top three concerns for Kent attractions overall in March 2009
UK economy
Weather
Exchange rate

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Issues having a positive effect on business in March ('sic')

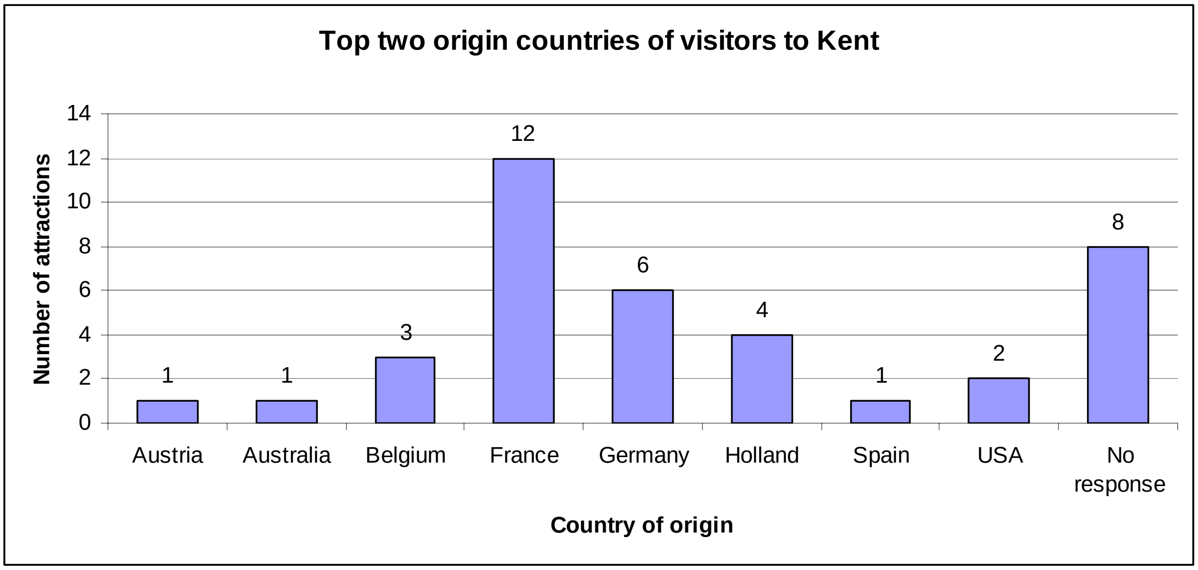
Advertisement
Better weather overall. Good value. Good facilities
BETTER WEATHER THIS YEAR
Better weather, revised opening times
Exchange rate.
Exhibitions & events. Free entry attracting people with less money to spend.
First month of trading so no indicators apart from weather / advertising open in March.
Good weather opened slightly earlier, exchange rate.
Growth in overseas groups
Increased online bookings
More central advertising support, family visits driven by added-value events, good weather
More overseas visitors. Discounted promotional offers
New attractions
No Easter in this period in 2009.
Not many to talk about other than small growth in French visitors. Decline in domestic coach market.
Strong Euro, local employment
Weather

Issues having a negative effect on business in March ('sic')

No Easter in March this year - Bad weather (Jan-Feb) closed to the public for two days. - Recession
Change of publicity process.
Credit crunch
Credit crunch
Decline in domestic coaches and general visitors
Economy. Weather.
Poor weather
Recession Weather
SECONDARY SPEND IS LOWER
Seeing effects of recession and drop in leisure visitors generally
Slower coach business
some bad weather early on
UK economic climate
Weather
Weather and Credit Crunch
Weather!
Whilst performance has been pretty good over last quarter, the economic factors must be having some impact upon visits hence some hefty promotional offers.

Overseas visitors to attractions in March

French visitors were again the highest represented nation in Kent in March, with Germany second and Holland third.



Attractions Confidence for the 1st quarter 2009

Each quarter, the attractions are asked within their survey for responses on their levels of business confidence, and for how their coach market is faring. The survey in March contained the confidence questions for the 1st quarter of 2009. We have included the expectations from the last survey, and compared them to the actual performance from this survey. Unfortunately for both surveys, there was an insufficient sample for coastal attractions to enable analysis to take place.

Overall, 18% more attractions than expected performed well in the first quarter and 6% more attractions than expected performed worse.

LAST CONFIDENCE SURVEY - Expectations for Jan to Mar 2009

Location	Expectations Up	Expectations Same	Expectations Down
Rural	55%	45%	0%
Urban	0%	60%	40%
Coastal	Insufficient sample	Insufficient sample	Insufficient sample
Overall	30%	50%	20%

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THIS QUARTER'S SURVEY - Estimated overall performance for January to March 2009

Location	Performance Up	Performance Same	Performance Down
Rural	60%	20%	20%
Urban	42%	25%	33%
Coastal	Insufficient sample	Insufficient sample	Insufficient sample
Overall	48%	26%	26%

Confidence amongst rural attractions is very high at 80%, but 26% of all attractions still expect a downturn over the coming quarter.

THIS QUARTER'S SURVEY – Expectations for April to Jun 2009

Location	Expectations Up	Expectations Same	Expectations Down
Rural	80%	Nil	20%
Urban	42%	25%	33%
Coastal	Insufficient sample	Insufficient sample	Insufficient sample
Overall	61%	13%	26%

Coach market to attractions

The coach market overall has improved according to an extra 2% of attractions whereas a further 19% believe it to have declined.

THIS 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%

LAST SURVEY Coach market 4th Quarter September to December 2008

Location	Coach Market Up	Coach Market Same	Coach Market Down
Rural	11%	78%	11%
Urban	30%	40%	30%
Coastal	Insufficient sample	Insufficient sample	Insufficient sample
Overall	20%	60%	20%

National Data on attractions (Source International Passenger Survey)

International Passenger Survey data for January to March will be available at the end of May, and will be included in the May Business Barometer. December's data was reported in February's Barometer.

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Accommodation

Kent self catering occupancy data

The figures for self catering are very strong for March and indicate that the Euro is continuing to have an effect on filling self catering rooms. As can be seen from the table below, although length of stay is down by on average nearly 3 days, net unit occupancy is up 9%, average party size up 0.2% and the percentage of overseas resident up 19%.

Self-Catering occupancy comparison data March 2008/9

	Average Stay	Net unit occupancy	Average Party size	% UK residents	% Overseas residents
Average March 2008	9.1	55.6	2.4	69	31
Average March 2009	6.4	64.5	2.6	50	50
Change from 08/09	-2.7	+8.9	+0.2	-19	+19

Kent serviced accommodation occupancy data

The serviced occupancy figures are looking stronger than the previous two months, and overall Kent serviced accommodation providers experienced a fall of just 2.5% compared to an 8% fall in January and a 10% fall in February.

Kent serviced accommodation occupancy data March 2008/9

District serviced accomm.	% room occupancy March 2008	% room occupancy March 2009	% change for month March		Length of stay March 2008	Length of stay March 2009	Change for month March
Ashford	No figs	49.2	Not comparable		No figs	1.6	Not comparable
Canterbury	57.6	42.6	-15%		1.8	1.4	-0.4
Dover	55.3	41.3	-14%		1.7	1.3	-0.4
Maidstone	61.4	54.7	-6.7%		2.0	1.0	-1.0
Medway	54.8	51.8	-3.0%		4.2	1.9	-2.3
Sevenoaks	20.8	72.8	Not comparable		No figs	No figs	No figs
Shepway	30.6	33.5	+2.9%		2.1	2.0	-0.1
Swale	44.2	30.2	-14%		1.8	No figs	Not comparable
Thanet	39.8	32.3	-7.5%		2.0	No figs	Not comparable
Tonbridge & Malling	No figs	No figs	No figs		No figs	No figs	No figs
Tunbridge Wells	56.9	55.8	-1.1%		1.4	3.6	+2.2
Kent average overall	47.0	44.5	-2.5%				

Please note that for Sevenoaks data from 2008 is not confirmed and that Tonbridge and Malling do not submit figures to the Business Barometer. Ashford did not have a sample of respondents for March 2008 and so comparison is not possible in this issue.

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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. However, data is now available for January 2009 from Visit Britain and shows that UK serviced bed space occupancy in January 2009 was 27%, 2 percentage points lower than in January 2008. At 41%, room occupancy was 3 percentage points lower than in January 2008.

Kent in comparison for January fared less well with serviced room occupancy down 8% and bed space occupancy down 5%.

The full UK occupancy survey for January can be found on the link below.

http://www.tourismtrade.org.uk/Images/jansum09_tcm12-45591.pdf

Accommodation Confidence Survey Jan – Mar 2009

The accommodation **Quarterly Confidence Survey** for the 1st quarter from January to March 2009 was sent out by Visit Kent directly to accommodation providers from all sectors. The respondents were from a good spread of locations and size but the sample was small in number and we would like to improve this. Please bear this in mind when interpreting the results. If you are an accommodation provider in Kent who would like to submit their data and support the Business Barometer, please contact Tracey Parker on 01227 862792 or tracey.parker@visitkent.co.uk. Thank you to those who offered during this survey.

Top three concerns for Kent accommodation overall in March 2009
1st - UK economy
2nd - Strength of the Pound
Jointly in 3rd place – Competition from other parts of the UK, and lack of promotion

1st Quarter 2009, Business Expectations for the next quarter

Location	Expectations up	Expectations same	Expectations down
Rural	36%	27%	36%
Urban	60%	20%	20%
Coastal	Nil	33%	67%
Overall	37%	26%	37%

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Positive factors affecting accommodation providers (sic)

A lot of regeneration locally, the Euro
beautiful rural AONB location attracts
Both New Zealand visitors were on business working in the area. More overseas visitors
euro exchange rate has helped with a slight increase in foreign guests
Exchange Rates, and overseas visiting relatives
Good weather may have helped
Just undergone a major refurbishment
Lots of overseas tour groups Businesses trying to spend their money prior to the end of the financial year end
Marketing and advertising
People deciding to stay/holiday in the UK
People not prepared to pay for a hotel, so are using B & Bs instead
Silver award + 4 star rating
Strength of Euro
Strong food and beverage demand within the hotel and tavern. Good weekend leisure.
We were recently rated No.1 Hostel in England (hostelworld.com) and was awarded 3 stars from the VisitBritain team
A lot of regeneration locally, the Euro

Negative factors affecting accommodation providers in Kent (sic.)

Bad weather
Credit Crunch
Downturn in pub trade
General economic downturn
Historically quieter at this time of year, lack of weekend business
Main corporate clients have reduced the number of room nights they required for the first quarter although we had an excellent April.
None other than weather
Pound
Prices, concerns about money
Recession in other countries means less people travelling to the UK.
The credit crunch, people not visiting relatives, guests asking for discounts
The current economic climate
The state of the UK market - there is little money for the early holiday break
UK Economy - lack of business in the area
Weather at times
Weather, Operation Stack

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Carrier News

Port of Dover Figures

MARCH	2009	2008	% CHANGE
Passengers	402,902	481,086	16.3% down
Cars	72,421	87,761	17.5% down
Coaches	2,839	3,867	26.6% down

Passenger numbers were considerably down during March for the Port of Dover, although this is partially attributed to Easter being in March 2008 and a considerable number of day visitor and short break visitors use the port during the Easter break.

Eurotunnel Figures

March was the first full month that Eurotunnel has been open since the fire in September 2008. However, there was still a 38% fall in visitor numbers since last March, due in part to Easter being in April this year, and also due to the recession. The poor Euro exchange rate meant fewer UK visitors travelled to Europe for a short break. France and Belgium were the top two countries of origin for passengers during March (excluding UK).

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).

The Tourist Information Centres in Kent reported a number of factors affecting their visitor numbers this month. Positive factors were that the Euro is still encouraging visitors and school groups from Europe, and one TIC was happy to report strong UK enquiries too. Another TIC reported a new local event had encouraged visitors. For some coach numbers were better, and early school holidays benefited a few. Good weather generally seemed to have encouraged more visitors. The only negative factor cited to be affecting TICs was the economic climate.

Visitor numbers at Kent TICs – March 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.

Visitor Numbers to

TICs	% change 2008-9
Coastal	-18%
Urban	-15%
Rural	No rural TICs submit
Kent overall	-15%

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Telephone Enquiries to

TICs	% change 2008-9
Coastal	+28%
Urban	-30%
Rural	No rural TICs submit
Kent	-19%

Postal and Email Enquiries to

TICs	% change 2008-9
Coastal	+74%
Urban	+15%
Rural	No rural TICs submit
Kent	+32%

Figures for individual TICs March 08/09

Name	Footfall March 2009	Footfall March 2008	% change Mar 08/09	Phone calls Mar 2009	Phone calls for Mar 2008	Postal/email enquiries Mar 2009	Postal/email enquiries Mar 2008
Ashford	1023	1009	1	300	233	284	160
Broadstairs	596	913	-35	18	22	0	0
Canterbury	24795	39410	-37	695	2840	266	211
Deal	1091	1316	-17	150	125	90	109
DOVER	5277	4988	6	458	405	579	348
Faversham	1259	981	28	87	0	27	0
Folkestone, Hythe & Romney	0	0	Not applicable	757	651	340	112
Gravesend	4234	3430	23	378	338	274	495
Maidstone	4437	5540	Not comparable, please see note below	348	371	88	42
Margate	2600	5428	-52	314	234	74	60
Medway	22986	22906	0	978	1357	360	309
Ramsgate	2072	2108	-2	107	42	58	41
Royal Tunbridge Wells	7440	3777	97	354	378	514	340
Sevenoaks	No figures	No figures	No figs	No figs	No figs	No figs	No figs
Tonbridge and Malling	365	408	-11	1302	724	0	0

Maidstone TIC has changed its organisational structure between 2008 and 2009 and so accurate comparison is not possible.

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Nationality of TIC visitors

March 2009	% Domestic Visitors	% Long Haul Visitors	% European Visitors
Ashford	90	1.5	8.5
Broadstairs	90	0	10
Canterbury	30	10	60
Deal	75%	5%	20%
Dover	65%	10%	25%
Faversham	87	5	8
Folkestone	80	5	15
Gravesend	95%	2%	3%
Maidstone	99	0.5	0.5
Margate	98.5	0.5	1
Medway VIC	60	5	35
Ramsgate	99.7	0.15	0.15
Royal Tunbridge Wells	75	5	20
Sevenoaks	No figs	No figs	No figs
Tonbridge & Malling	90%	2%	8%

Positive factors affecting the results include: (sic)

School holidays, good exchange rate, weather	Canterbury
Euro and overseas school groups	Dover
Strong Euro is still driving enquiries from near-Continent, but I am very happy to report that enquiries from UK are at decent levels also.	Folkestone
The improvement in the weather and also booking for our Heritage Festival has meant an increase in visitor numbers.	Gravesend
Relative pick up in visitors for March akin to last year. Coach numbers are stronger given a weak Jan and Feb.	Medway
Rise in French groups. Rise in Domestic Group Walks organised by the TIC	T Wells

Negative factors affecting the results were cited as: (sic)

Economic climate
credit crunch
Quiet time of year
Economic climate
credit crunch
credit crunch
Credit crunch

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Other News

– Source Visit Britain Trends Update

- BAA's seven UK airports handled 11.3% fewer passengers in March than a year earlier; domestic traffic declined 8.6%, European scheduled 11%, North Atlantic by 17.6% and other long-haul by 5.6%
- Civil Aviation Authority figures reveal that the number of passengers arriving and departing UK airports in January onboard scheduled air services was 7.2% down on a year earlier
- BA carried 8.2% fewer passengers in March than a year earlier
- EasyJet carried 6.3% fewer passengers in March than a year earlier
- Flybe to operate 18 flights per week from Dusseldorf to Gatwick from June
- Blockades by French fishermen result in the cancellation of several cross-channel ferry services

Big Day Out update

The third Big Day Out on 28th March was an outstanding success, with more attractions, more vouchers, more media partners, and more participants proud to live in Kent. The full report will be available shortly, and will be posted on the B2B site. www.visitkentbusiness.co.uk, but some of the top line figures are as follows:

- 143 attractions took part
- 18,403 vouchers were available from the website
- Over 100 Tourism Students took part
- 86% rated the Big Day Out as an excellent idea
- 80% stated they would visit the attraction again
- 93% would recommend the attraction to Friends and Family
- 97% were proud to live in Kent

Exchange rate

As can be seen by the following diagram from Visit Britain, the continuing very favourable exchange rate and good weather are the real positive factors supporting domestic tourism and tourism to Kent.

If you have any questions regarding the Business Barometer, please contact Tracey Parker, Research Manager, on 01227 862792 or tracey.parker@visitkent.co.uk .

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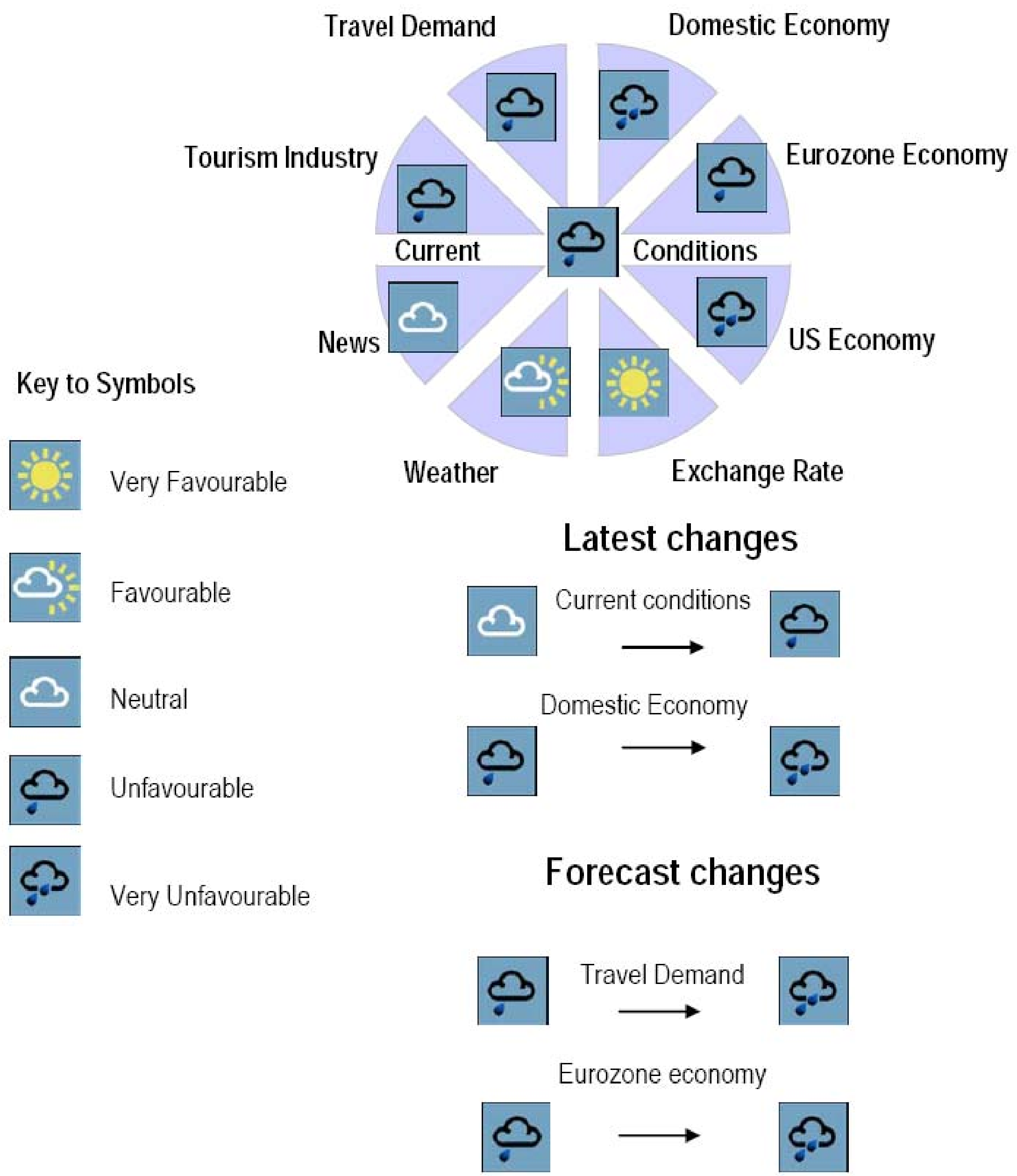
Factors contributing to tourism trends in Britain, March 2009



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