



With thanks to Wildwood for the images of some new residents of Kent, the baby polecats and a baby red squirrel.

Visit Kent's Business Barometer May 2009

Welcome to the Business Barometer for May produced by Visit Kent's research team.

Kent Headlines - Comparison May 2008/2009

Kent Attraction Visitor Numbers overall	- Up 19%
Kent Serviced Accommodation Occupancy	- Down 6%
Kent Self Catering Unit Occupancy	- Up 6%
TIC Visitor Numbers	- No change
Cross Channel Passengers	- Down 7%

- Visitor Attractions in Kent have experienced another excellent month for day visitors benefiting from the strength of the Euro and the fine weather. Historic buildings were up 25% and charging attractions up by 20%
- Cross channel carriers experienced a fall in passenger, car and coach crossings. This may be due to UK residents having more breaks and day trips in the UK rather than crossing the channel due to the strong Euro.
- Self catering accommodation experienced a 6% rise in occupancy, and an increase of 9% in UK occupants, and so it would seem that the 'staycation' was in evidence in May for this type of accommodation
- Ashford and Shepway serviced accommodation saw an increase from last year but this sector overall was down with business tourism being particularly affected by the current economic climate
- Coastal TICs have experienced a 16% rise in May of face to face visitors which bucks the trend to a more telephone/internet based type of enquiry.
- Kent seems to be performing better than the rest of the UK for overseas visitors. IPS data reported a 3% drop in overseas visitors to the UK over Easter and a 10% drop in 2009 so far. Kent tourism businesses are reporting an increase in near European visitors and May saw good representation from the long haul markets.
- Hits to www.visitkent.co.uk were up 32% compared to last year

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Weather May 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. The BBC has altered its reporting format online for the weather for May and so our reporting will take a slightly different format from now on in line with this.

According to the BBC, May was a warm and sunny month generally getting off to a quiet start. The month became 'livelier' around the 6th to 7th with a period of unseasonably strong winds followed a week later by some very heavy, thundery rain which provided 20 to 30mm in just a few hours across central and southern England. Heavy, thundery rain affected parts of south-east England overnight on the 25th into the 26th, although the worst of this disruptive weather remained just off-shore to the east.

England Mean Temperature Series 1.5 degrees above average

England Rainfall Series 75% of average

Visit Kent website

Each month the Business Barometer will now also show the number of visitors to the Visit Kent website to give an indication of the level of interest in Kent on the web. For the May comparison 2008/9 it shows a 32% rise in visitors to the site.

Visitors to www.visitkent.co.uk

May 2008	May 2009
97,249	143,903

Attractions

Visitors to attractions in Kent seem to be mainly day visitors from either France, residents of the county, or from elsewhere in the UK. Following on from the excellent rise in April, May visitor numbers are up again by 19%.

Kent visitor numbers to attractions reporting in May

Visitor numbers	May 2008	May 2009	% Change
	439,505	523,873	Up 19%

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Range of performance amongst attractions overall

For 70% of the submitting attractions, their visitor numbers were up, ranging from 4% to 53% up compared to May 2008. 6% had no change in their figures, and 24% had a fall in visitor numbers ranging from 1% to 64%.

Performance according to attraction type

With the continuing good weather in May, outdoor attractions and rural areas benefited most. Historic buildings were up by 25%, and 'other' attractions which in this month's submission are mainly 'outdoor' in nature, were also up by 31%. Gardens surprisingly were less successful this month in attracting visitors.

Gardens	Historic Building Heritage Attraction	Museum	Tour/Transport attraction	Zoo/ Animal Attraction	Outdoor Activity water sports	Other
Down 10%	Up 25%	Up 3%	Up 12%	Up 6%	Up 9%	Up 31%

Performance according to attraction location

Rural and urban attractions performed the most strongly in May, and for many of the rural attractions this was put down to good weather and some interesting new events or product changes.

Coastal	Rural	Urban
Up 4%	Up 22%	Up 17%

Performance according to attraction cost

The weather was sufficient a lure to visitors to encourage them to pay for their attractions in spite of the economic conditions.

Charging	Free
Up 20%	Up 10%

The range of performances of the attractions is due to a number of factors which are detailed below.

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Reasons given for an increase in visitor numbers

- Good weather
- Good marketing
- Euro exchange rate
- Extra events
- General growth in visitors
- Good value of product
- Group visits up on last year
- More education bookings
- UK visitors staying at home
- Diversification of product
- Opened a week earlier
- Vouchers and money offers

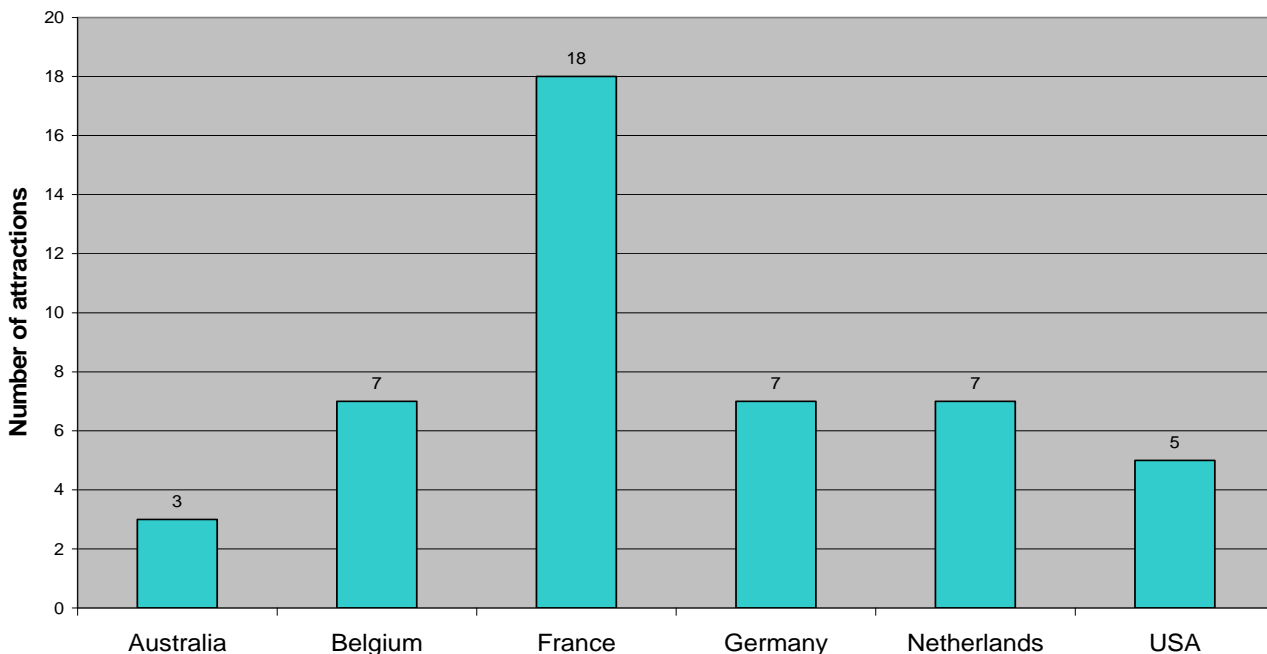
Reasons given for a decrease in visitor numbers

- Economic climate
- Lower secondary spend
- Extra visitors not sufficient to cover costs
- Good weather not always good for indoor attractions
- Lack of support from local tourism association
- Lack of marketing
- More limited opening due to cut in resources

Overseas visitors to attractions in May

Interestingly May appears to have attracted a few more long haul visitors from the USA and Australia part of which may be down to the good exchange rate with the US dollar at the moment. The continuing European market is dominated by the French, but following on an equal footing are Belgium, the Netherlands, and Germany.

Top two origin countries for visitors to Kent



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National Data on attractions (Source International Passenger Survey)

VisitBritain provide regular information on the incoming visitors to the UK through the International Passenger survey available on www.tourismtrade.org.uk.

From the April update from Visit Britain it would seem that Kent is doing comparatively well to other parts of the country. The update states that:

- In spite of the positive impact of Easter falling in April this year as opposed to March last year, the number of overseas residents visiting the UK in April 2009 was down 3% compared with April 2008.
- Spending in April this year was also 3% lower than the same month last year.
- The year-to-date picture is that 10% fewer overseas visitors came to the UK in the first four months of 2009 compared to the same period of 2008. Total spending over this period is 1% lower than last year in nominal terms.
- Sterling was (on average) 11% weaker against the Euro and 26% weaker against the US Dollar in April 2009 compared to April 2008, meaning that most visitors' currencies are going further this year, with each visitor spending more on average.

Visit Britain shows the origins of the visitors to the UK in the table below, and the increases or decreases in numbers as relevant. In April it can be seen that there was a 3% rise in the EU15 countries visiting which includes France, Belgium, Netherlands and Germany, Kent's main markets.

	APRIL		3 MONTHS TO APRIL		YEAR-TO-DATE		TWELVE MONTHS TO APRIL	
	Visits	% change	Visits	% change	Visits	% change	Visits	% change
	(000)	09/08	(000)	09/08	(000)	09/08	(000)	09/08
North America	300	-9	700	-18	930	-17	3,630	-18
EU15	1,660	3	4,290	-5	5,530	-4	18,100	-3
A12	220	-22	680	-19	880	-23	3,050	-7
Rest of Europe	190	6	420	-17	530	-19	1,911	-5
Rest of World	260	-16	670	-22	1,020	-17	4,230	-8
Total Visits	2,630	-3	6,780	-10	8,910	-10	30,940	-6
	Spend	% change	Spend	% change	Spend	% change	Spend	% change
	(£m)	09/08	(£m)	09/08	(£m)	09/08	(£m)	09/08
Total Spend	1,295	-3	3,295	-4	4,420	-1	16,320	1

Source: International Passenger Survey, Office for National Statistics

Notes:

EU15 = Austria, Belgium, Denmark, France, Finland, Germany, Greece, Irish Republic, Italy, Luxembourg, Netherlands, Portugal, Spain and Sweden

A12 = Bulgaria, Cyprus (South of), Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia

Rest of Europe – European countries outside the European Union (includes Russia)

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Accommodation

There is a mixed picture for accommodation in Kent, with self catering experiencing a 6% rise and serviced accommodation experiencing a 6% drop in May. Ashford and Shepway are the only two areas this month who have experienced a rise in occupancy for their serviced accommodation.

Please note that Medway's serviced accommodation occupancy figure is from a small sample of accommodation providers who are in the majority smaller providers rather than larger brand hotels, and so the occupancy rate is not reflective of the whole Medway accommodation product.

Kent serviced accommodation

Occupancy data for May 08/09

District serviced accomm.	% room occupancy May 2008	% room occupancy May 2009	% change for month May	Length of stay May 2008	Length of stay May 2009	Change for month May
Ashford	62.7	68.0	+ 5.3	1.3	1.5	+0.2
Canterbury	63.5	53.7	- 9.8	1.6	1.8	+0.2
Dover	62.9	61.4	- 1.5	1.4	1.1	-0.3
Maidstone	72.5	69.1	- 3.4	2.4	2.8	+0.4
Medway	77.3	27.2	-50.1	2.6	1.6	-1.0
Sevenoaks	38.3	78.3	Not comparable *	2.2	1.6	-0.6
Shepway	51.6	56.2	+4.6	2.1	2.1	No change
Swale	54.9	50.9	- 4	2.1	2.2	+0.1
Thanet	52.2	44.2	- 8	1.8	No data	n/a
Tonbridge & Malling	No contributors	No contributors	No contributors	No contributors	No contributors	No contributors
Tunbridge Wells	76.5	62.0	- 14.5	2.1	2.1	No change
Kent average overall	62.3	56.7	-5.6	1.9	1.9	No change

* Please note that for Sevenoaks data from 2008 is not confirmed.

Kent self catering occupancy data

It is a more positive picture for self catering accommodation which for May is receiving more UK residents this year than last and this may indicate a greater tendency for UK residents to stay in the UK for their half term breaks. Self catering occupancy was 6% up on last year

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Self-Catering occupancy comparison data May 2008/9

	Average Stay	Net unit occupancy	Average Party size	% UK residents	% Overseas residents
Average May 2008	7.0	64.7	3.1	58.3	41.7
Average May 2009	6.7	70.7	2.6	67.6	32.4
Change from 08/09	- 0.3	+ 6.0	- 0.5	+ 9.3	- 9.3

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 March 2009 as follows:

National serviced accommodation occupancy from the UK Occupancy survey Comparison between 2008 and 2009

	Bed space occupancy	Room occupancy	Location and differences in results
March 08/09	36% Down 3%	51% Down 3%	The greatest falls were noticed by seaside and small town accommodation providers (-5%).

These serviced room occupancy figures for March 2009 compare with Kent as follows:

	Kent	National figures
March	44.5% (down 2.5%)	51% (down 3%)

Carrier News

The channel crossings totals include both Port of Dover and Eurotunnel figures and show that for May, crossings were down 7% for passengers, 8% for cars and 9% for coaches.

MAY	2009	2008	% CHANGE
Passengers	1,301,410	1,393,246	Down 7%
Car	290,697	314,310	Down 8%
Coaches	11,484	12,560	Down 9%

The current economic recession and the strength of the Euro were given as the main reasons for the drop in numbers. Overseas passengers were estimated to be mainly from France and Belgium, but it would seem from accommodation figures that these visitors are potentially for day trips only.

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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). Coastal TICs seem to have experienced a rise in face to face visitors in May which is against the trend for the other TICs which seem to be increasing their telephone and email contact instead.

Visitor numbers at Kent TICs – May 2009

Visitor Numbers

TICs	% change 2008-9
Coastal	Up 16%
Urban	Down 6%
Rural	Too small sample
Kent overall	No change

Telephone Enquiries

TICs	% change 2008-9
Coastal	Up 4%
Urban	Up 25%
Rural	Too small sample
Kent	Up 18%

Postal and Email Enquiries

TICs	% change 2008-9
Coastal	Up 8%
Urban	Up 22%
Rural	Too small sample
Kent	Up 16%

Factors quoted as affecting the TICs level of business (sic)

Economic climate, good weather driving people towards the coast rather than inland

Weather, overseas student visits

We are getting quite busy now.

Good weather, keen prices on short breaks with larger hotels

Strong euro and cruise business. Increased confidence in economy

This month was very busy due to our Heritage Festival 16th-31st May.

We no longer offer Council Services

Steady Coach groups - growth in overseas groups. Good Weather and general increase in individual visitors.

Good weather, public holidays

Good weather, exchange rate for dollar and euro.

Numbers stopping at motorway service area

People do not have money to spend

Figures for individual TICs May 08/09

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Name	Footfall May 2009	Footfall May 2008	% change May 08/09	Phone calls May 2009	Phone calls for May 2008	Postal/email enquiries May 2009	Postal/email enquiries May 2008
Ashford	1143	1385	-17	356	619	205	198
Broadstairs	1600	1163	38	51	63	0	2
Canterbury	40389	43387	-7	4950	2420	223	0
Deal Visitor Information Centre	1500	1607	-7	186	161	355	463
Discover Folkestone	n/a	n/a	n/a	660	587	259	277
DOVER	15015	12446	21	2025	2003	970	816
Faversham	1574	1736	-9	136	0	25	0
Gravesend	4625	3002	54	96	103	296	230
Maidstone Visitor Information	3848	6874	Not comparable	353	509	46	64
Margate	4682	4868	-4	269	407	57	30
Medway VIC	39797	40535	-2	906	1476	303	373
Ramsgate	5470	3879	41	237	211	67	10
Royal Tunbridge Wells	2131	2033	5	516	621	375	260
Sandwich	2520	2140	18	106	106	20	24
STOP24	1778	n/a	n/a	Not recorded	Not recorded	Not recorded	Not recorded
Tonbridge	822	1214	-32	943	746	1099	956

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

Origin of TIC visitors

May 2009	% Domestic Visitors	% Long Haul Visitors	% European Visitors
Ashford	83	7	10
Broadstairs	98	1	1
Canterbury	30	10	60
Deal Visitor Information Centre	75	10	15
Discover Folkestone	90	1	9
DOVER	55	30	15
Faversham	94	6	4
Gravesend	95	3	2
Maidstone	98	1	1
Margate	97	1	2

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Medway VIC	60	10	30
Ramsgate	97	1	2
Royal Tunbridge Wells	50	15	35
Sandwich	85	3	12
Tonbridge	90	2	8

Other News

Exchange Rates

Visit Britain reports the exchange rate between Sterling and the Euro, and demonstrates the good value of the UK as a destination to our European neighbours.

month ends	Euro	yr-on-yr %
31-May-09	1.13	-11%
30-Apr-09	1.12	-11%
31-Mar-09	1.09	-16%
28-Feb-09	1.13	-15%
31-Jan-09	1.09	-18%
31-Dec-08	1.10	-20%
30-Nov-08	1.20	-15%
31-Oct-08	1.27	-11%
30-Sep-08	1.25	-14%
31-Aug-08	1.26	-15%
31-Jul-08	1.26	-15%
30-Jun-08	1.26	-15%
31-May-08	1.26	-14%
30-Apr-08	1.26	-15%
31-Mar-08	1.29	-12%
29-Feb-08	1.33	-11%
31-Jan-08	1.34	-11%

Web marketing

For marketing using the World Wide Web it is also interesting to note the level of use in each country listed below. Web marketing works best for those countries where the Internet penetration is highest.

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Country	Internet users	Internet penetration	Broadband subscribers	Broadband penetration
Australia	15,504,531	76%	4,700,200	22%
Belgium	5,100,000	49%	2,512,884	24%
Canada	22,000,000	68%	8,142,320	25%
European Union	269,740,453	55%	90,851,417	18%
France	34,851,835	55%	14,250,000	23%
Germany	53,240,115	65%	17,472,000	21%
Greece	3,800,000	34%	787,000	7%
Guernsey and Alderney	36,000	56%	n/a	0%
Hong Kong, (China)	4,878,713	68%	1,796,200	25%
Ireland	2,060,000	50%	653,000	16%
Italy	33,143,152	57%	9,307,000	16%
Japan	87,540,000	68%	27,152,349	21%
Jersey	27,000	30%	n/a	0%
Luxembourg	339,000	73%	105,134	23%
Netherlands	14,544,400	88%	5,470,000	33%
New Zealand	3,200,000	75%	683,500	16%
Norway	4,074,100	88%	1,388,047	30%
Portugal	7,782,760	74%	1,555,641	15%
Sweden	6,981,200	77%	2,596,000	29%
Switzerland	5,230,351	69%	2,322,577	31%
United Kingdom	40,362,842	66%	14,361,816	24%
United States	215,088,545	71%	66,213,257	22%

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New research and intelligence updates from Visit Britain



Visit Britain has just introduced a new quarterly 'round-up' e-newsletter to highlight the key market intelligence and research available through them at a national level. The link for the 'Arrivals' newsletter is:

http://www.tourismtrade.org.uk/Images/Arrivals_Spring%2009_tcm12-45709.pdf

This replaces the Visitor's Voice bulletin.

Holiday intentions of Europeans – Research

FORESIGHT
Issue 67 May 2009

Source Visit Britain

The holiday intentions of Europeans were examined by research from the European Commission, where 1000 consumers in each of the European states were interviewed on their holiday intentions for 2009. The results show that one fifth of all respondents were not prepared to give up any trips at all, only one in eight would give up their summer holiday, and winter holidays were the most likely break to be cut.

As can be seen from **Chart 1** below, there seems to be a reasonably strong correlation between the level of disposable income per capita in each country, and their willingness to take a holiday in 2009. For the main European market for Kent and for Visit Kent, it would appear that at least 80% of the population of the target countries of Germany, France, Belgium and the Netherlands are still planning to take a holiday in 2009, in spite of the current economic conditions.

Chart 2 helps us to analyse the priority each country places on 'Value' versus 'Price' for their holidays. For the European market, in the majority of countries, value was far more important than price, and in the UK this was by a factor of 3 to 1. In 11 out of 27 countries, more than a third of respondents said that value was the most important consideration. For Kent and for Visit Kent, the Netherlands consumer is more cost conscious than the other near European markets. Germany, Belgium and France all place value for money as a key consideration for their holiday booking.

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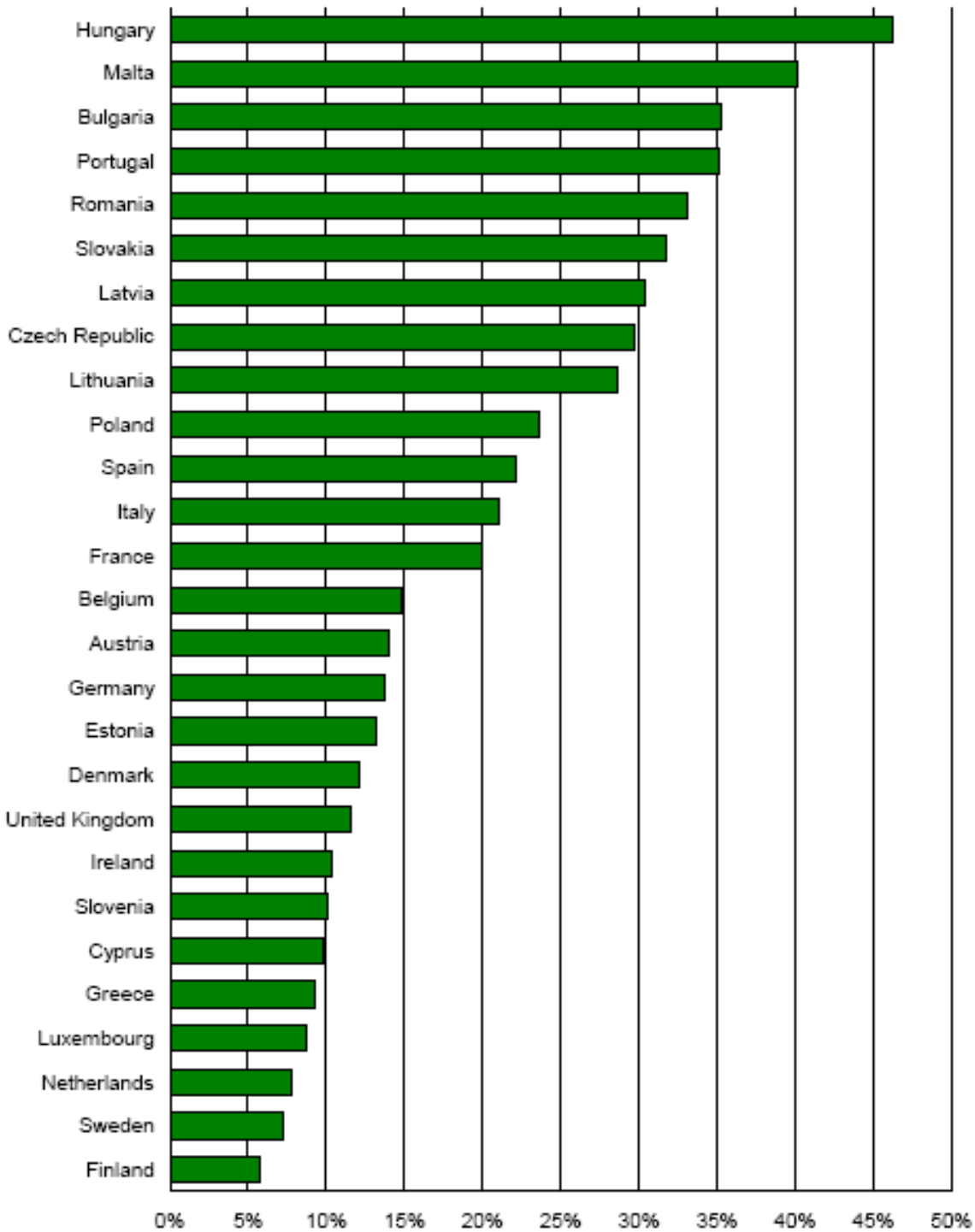
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CHART 1

Proportion not planning to take a holiday in 2009

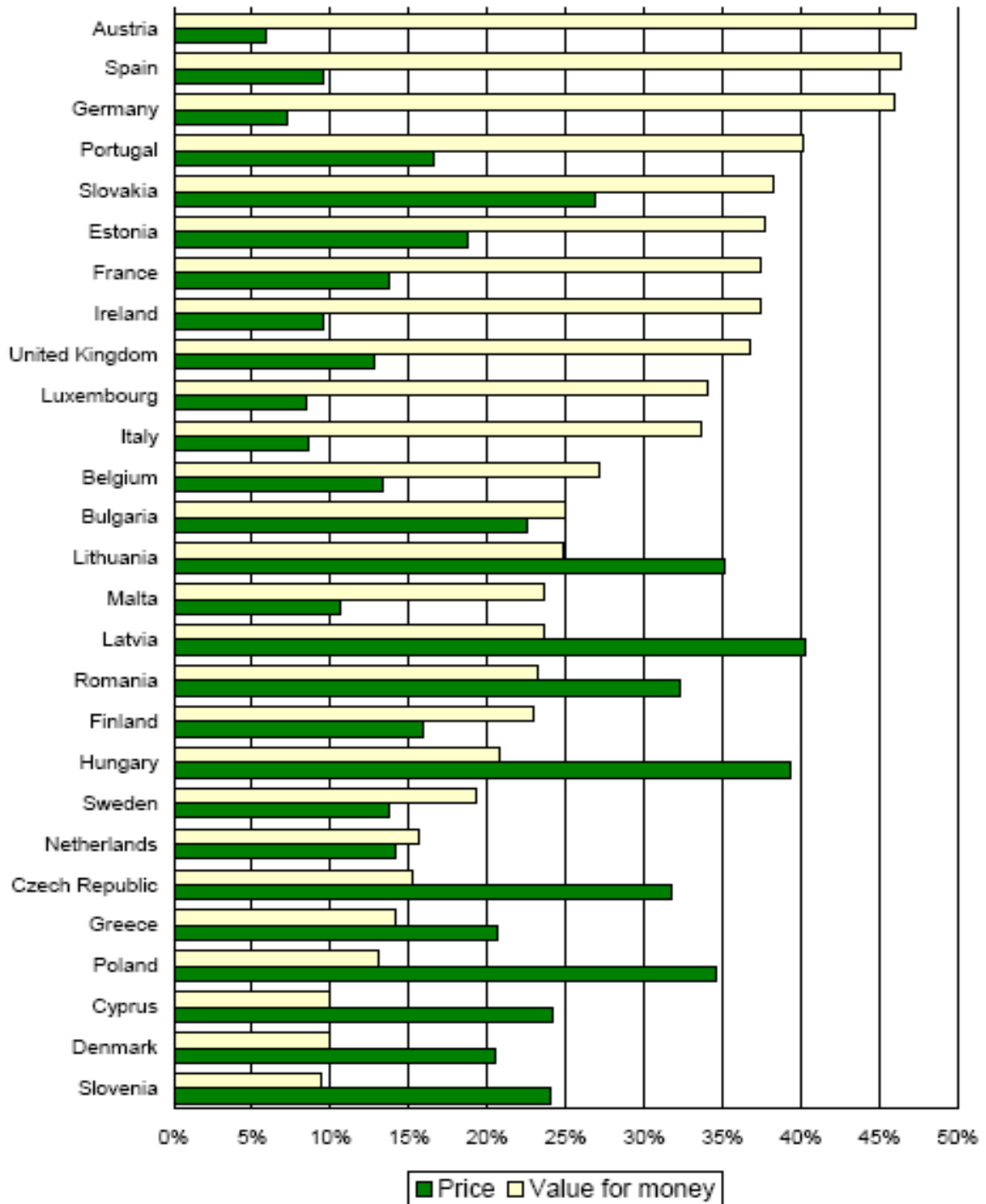


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CHART 2

The importance of price versus value for money

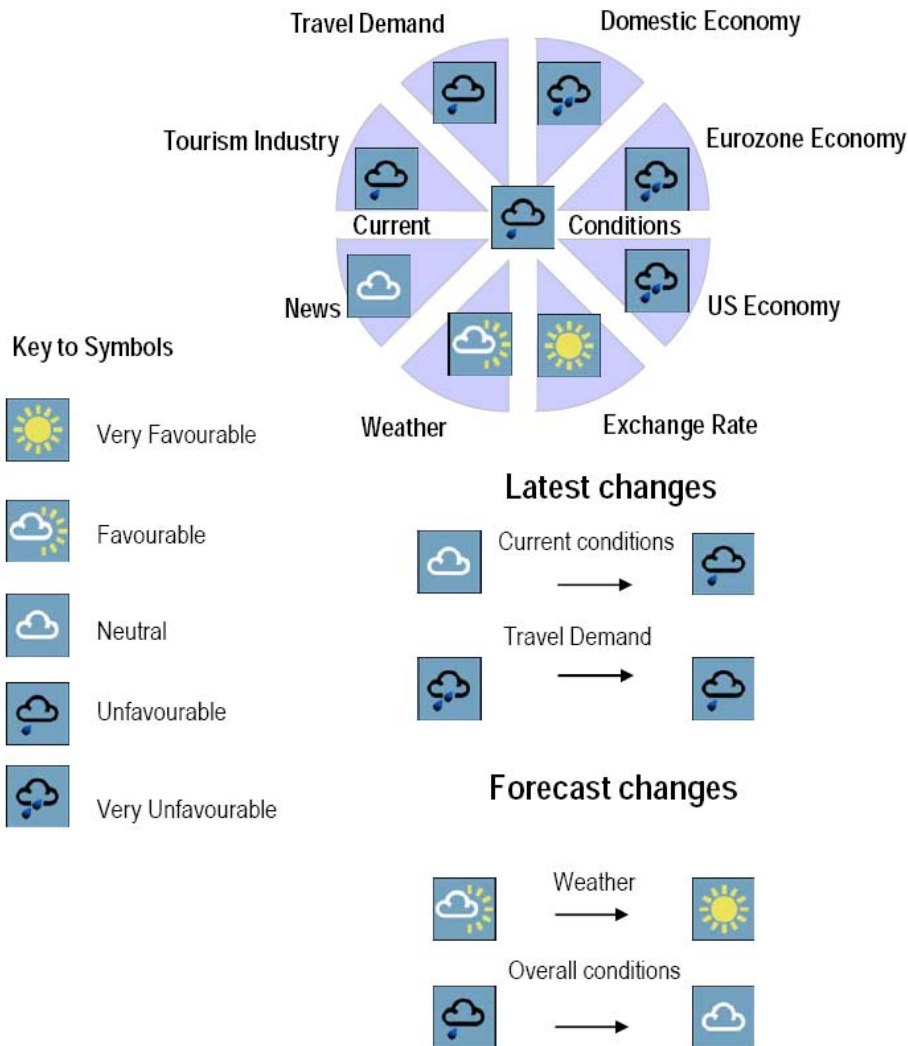


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Factors contributing to tourism trends in Britain, May 2009



If you have any questions, comments or suggestions regarding this document please contact the Visit Kent's Research Manager, Tracey Parker on 01227 862792 or email on tracey.parker@visitkent.co.uk. If you do not yet contribute your data but would like to participate as a business in Kent, please also contact Tracey as above.

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