



Visit Kent's Business Barometer February 2011

February was another good month for many businesses compared to the slow start last year. Attractions and smaller accommodation providers particularly noticed a stronger upward trend in bookings and occupancy, and half term was considered very successful.

Comparison February 2010/11

Attraction visitor numbers	Up 16%
TIC Footfall	Down 11%
Cross Channel Passengers	Up 3.5%
Serviced Accommodation which includes the smaller B&B and guest houses. Source: www.ribos.co.uk/kent	Up 5.9%
Serviced Accommodation Larger Hotel Accommodation Occupancy for February Source 2011 STR Global Ltd	Down 7.3%

Other news

- Visitor numbers to attractions continue to be buoyant compared to last year, as better weather encourages visits.
- Smaller serviced accommodation is buoyant compared to 2010, and is in many cases back to 2008 levels.
- Cross channel carriers report a better start to the year than 2010, due to better weather.
- TICs report a drop in footfall and phone calls, but emails and letters are up by 2%
- Visits to the consumer site were up by 41% and page views up by 71%
- Half Term mild weather brought visitors out to the county for day visits
- Business Tourism figures for February were not available from Kent Conference Bureau at the time of going to 'print', but will be reported in the next Barometer.



Attractions

Kent visitor numbers in February 2011

Visitor numbers	2010	2011	% change
	91,277	106,118	Up 16%

Visitor numbers for the year to date

	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%

Range of performance amongst attractions overall

11 attractions were up ranging from 9% up to 113%. 1 attraction remained the same as last year, and 6 attractions were down, ranging from 1% to 57% down.

Performance according to cost % change February 10/11

Charging	Free
Up 25%	Down 21%

Performance according to location, % change February 10/11

Coastal	Rural	Urban
Down 2%	Up 27%	Up 12%

Performance according to attraction type, % change February 10/11

Museum	Historic Building Heritage Attraction	Other
Down 1%	Up 23%	Up 8%

Performance according to size, % change February 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 10%	Up 33%	Up 10%	Up 23%	Up 17%



Factors affecting visitor attraction results

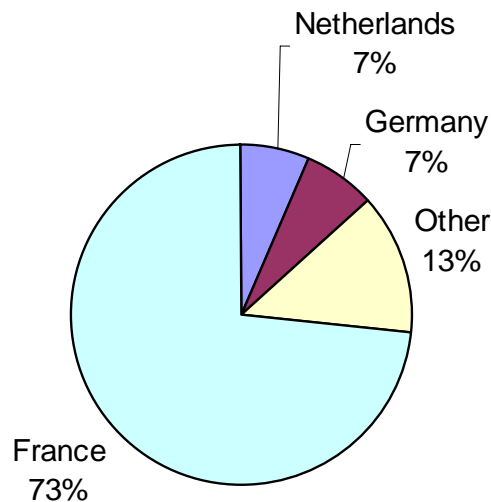
Positive factors
Good weather. Concern over future of forests
Gallery exhibitions
Kids promotion at half term
Very good half term week (helped with our event), mild weather, good marketing
Good weather and strong groups market - strongest Feb on record
Visitors from Europe still holding up reasonably well
Increase in Individual visitors and an additional week of educational schools visits. Very good half term holiday week.
We only opened for half term this year - but there was a good increase in visitors to the attraction.
Exhibition & events on offer

Negative factors
Lack of facilities
Weather. Cold, wet and extremely foggy

Overseas visitors to attractions in February

Domestic visitors were 85.7% of visitor totals, with long haul 2.7%, and European 11.6%.

Top countries of origin of overseas visitors in February





Cross Channel Carriers

These figures are the combined totals for the Port of Dover and Eurotunnel and show a rise in crossings across the board in February compared to 2010. Crossings were affected by snow at the beginning of the month.

Cross channel crossings

February	2011	2010	% CHANGE
Passengers	826,892	798,550	Up 3.5%
Cars	206,189	197,553	Up 4.4%
Coaches	5,027	4,921	Up 2.1%

Tourist Information Centres (TICs)

TICs Comparison February 2010/11

Name of TIC	Footfall 2011	Footfall 2010	% change	Phone Calls 2011	Phone Calls 2010	Emails 2011	Emails 2010
Ashford	798	917	-13	182	254	316	325
Canterbury	22303	27880	-20	578	679	172	187
Deal	1131	1208	-6	94	100	245	196
DFH&RM	0	0	n/a	638	662	241	315
Dover	4329	4372	-1	256	224	530	507
Faversham	1149	691	66	105	68	79	31
Gravesend	3000	2767	8	244	280	413	308
Medway	16500	15240	8	531	779	260	243
Royal T Wells	1257	4308	-71	364	356	335	447
Thanet	1932	1748	11	133	175	66	50
Tonbridge	1638	1392	18	508	571	0	0
Kent	54037	60523	-11%	3633	4148	2657	2609

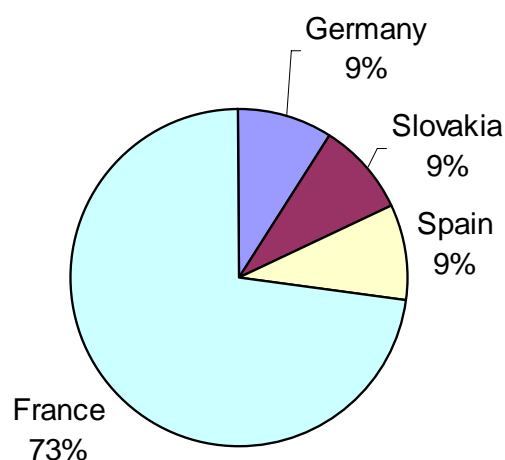
Please note that Tonbridge has had a change of structure, and Tunbridge Wells have changed their setup. Thanet is the name for the only remaining TIC in Thanet based at Margate, and so the figures now relate to the merged TIC enquiries and are not directly comparable until April 2011 onwards.



Nationality of TIC visitors

Name of TIC	Domestic	Long Haul	European	Euro visitors compared to February 2010
Ashford	92	1	7	Down 4%
Canterbury	60	5	35	Up 15%
Deal	99	0	1	Down 3%
DFH&RM	80	3	17	Up 11%
Dover	60	10	30	No change
Faversham	96	1	3	No change
Gravesend	93	1	6	Up 5%
Medway	60	5	35	Up 15%
Royal T Wells	98	1	1	Down 9%
Thanet	99.2	0.2	0.6	Down 0.2%
Tonbridge	95	1	4	Up 1%

Top countries of origin of Overseas TIC Visitors in February (%)



Accommodation

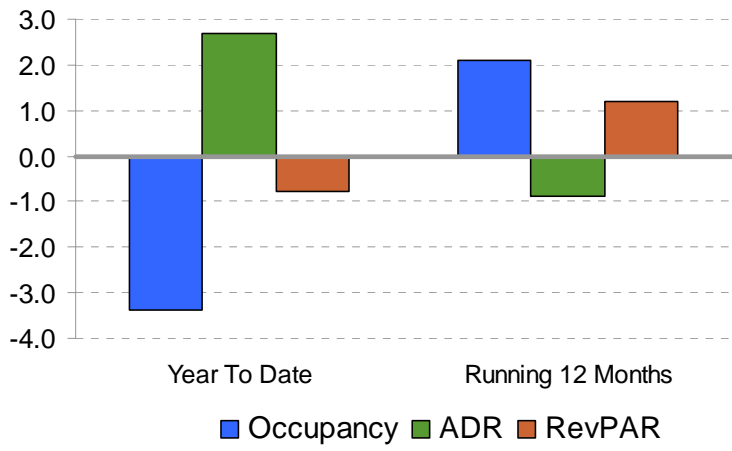
Larger hotel serviced accommodation

According to STR Global, room occupancy in February for the larger and chain hotels was down 7.3% compared to 2010. This may be as a result of a downturn in business tourism bookings and the associated accommodation.

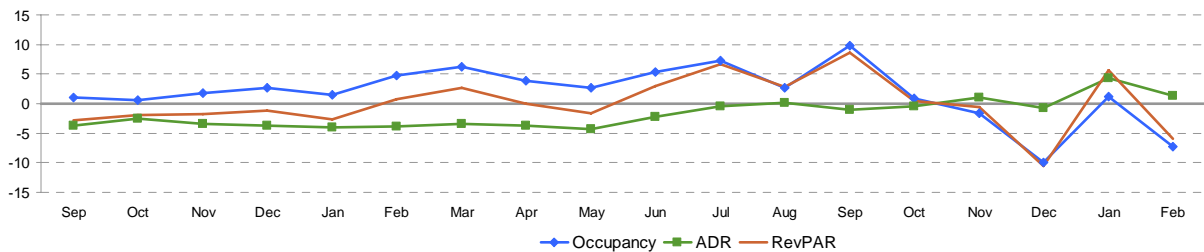


Occupancy (%)	2011	
	Jan	Feb
This Year	50.2	60.2
Last Year	49.6	64.9
Percent Change	1.2	-7.3

Overall Percent Change



Monthly Percent Change

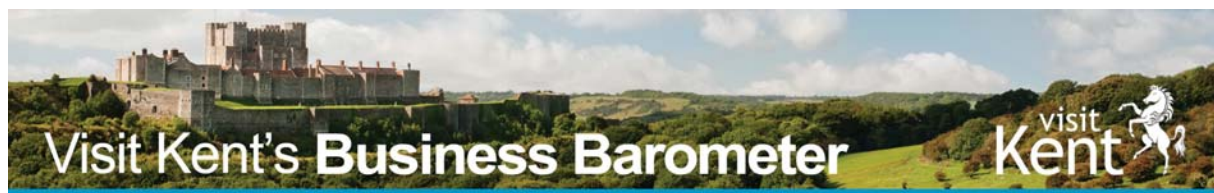


Smaller hotels, guest houses and B&B's

Accommodation occupancy in February was the best since 2008 for the individual hotels, guest houses and B&B's. 91% of guests were from the UK, 9% from overseas. Average length of stay for UK guests was 1.72 days, and for overseas guests 1.71 days.

Year on year occupancy comparison Kent

Kent Occupancy	February 2008	February 2009	February 2010	February 2011
	50.6%	41.0%	36.6%	42.5%



Occupancy according to location

Location	Occupancy
Countryside/village	31.09
Seaside	33.67
Large town/city	52.37
Small town	60.28

Occupancy according to business type

Location	Average Occupancy
Bed and Breakfast	34.2
Guest House	40.6
Hotel/Inn	51.2

Visit Kent News

Visit Kent Research update

The Research Team is hosting a Research Forum in Kent on May 12th under the SusTRIP (Sustainable Tourism Research and Intelligence Partnership). The forum is funded by Europe under the Two Seas Interreg Programme and will bring together experts from all four partner areas. The topic of the forum is **‘Measuring Tourism Performance in the Two Seas Region’**

Royal Wedding – Is it good for business?

Businesses were asked in the Barometer surveys if the Royal Wedding will have a positive or negative effect on their business. Generally opinion was pretty undecided on whether the Royal Wedding would benefit their business or not. For TICs, 64% were unsure, 27% thinking it will be good for business and the remaining 9% thinking it will be bad. For attractions, 58% were unsure, 21% thinking it is good for business, and 21% thinking it will be bad for business. For accommodation, 75% felt it would have a small effect on business, 20% not at all, and the remaining 5% a considerable effect.

Rises in fuel prices – will it affect your business?

Businesses were also asked in the Barometer survey if they have noticed an effect on their business of the recent fuel price rises. Accommodation providers commented that they had noticed either some effect or a noticeable effect with only a few reporting no effect at all. For attractions, the following comments about the fuel rises were made.



Impact of fuel rises on businesses in Kent
They will discourage people from travelling from further afield
Slightly less visitor numbers
We are charged a percentage of the cost for the whole building so this will presumably increase.
Bad news - we are primarily a drive to attraction and expect to suffer as the year continues
Will affect visitors travelling from over 60min drive time areas.
Too early to say, but likely to deter visitors
Increased costs as a major part of our expenses are fuel related
Yes, it will definitely impact eventually on our business
No real measurable impact as yet, although it may well reduce visitors from beyond 1hr drive time.
Only affecting corporate business.
We are a location that it is necessary to drive to so some effect if people are driving less

For TICs, merchandise was felt to be increasing in price due to higher fuel costs, but for those with good public transport it was felt to be encouraging greater use of sustainable transport.

Ahead of the Games - your guide to preparing for London 2012

Advice is available from the organisers of the 2012 Olympic Games about planning for the Olympic games. Click on the link below for full details and the guide:

<http://www.tourism2012games.org/ahead-of-the-games.aspx>

Visit Kent Websites

Consumer website www.visitkent.co.uk.

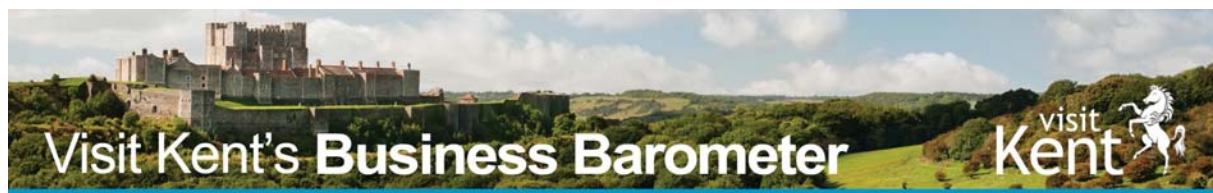
Visits to the consumer site were up by 41% and page views up by 71%

February 2009 unique visits	February 2010 unique visits	February 2011 unique visits
100,048	159,072	223,949

B2B website www.visitkentbusiness.co.uk

Visits to the B2B site were down by 10 % and page views by 14%

February 2009 unique visits	February 2010 unique visits	February 2011 Unique visits
1,071	1,641	1,478



Visit Kent Marketing

Following a busy month of exhibitions in January, in February our Investors were invited to an exclusive preview of Turner Contemporary for our Investors' Meeting. At this event we welcomed Alex Mawer from Visit England who updated us on tourism from the national perspective and officially launched our new 'Garden of England' branding.

A brand tool kit has been developed for Kent's tourism industry (and wider stakeholders) to help stimulate ideas for their own marketing campaigns. Whilst Visit Kent does not want all tourism businesses in Kent to do the same thing it needs to encourage consistency of message across all consumer touch points which potential visitors will see. Repetition of message promotes a very powerful image for Kent and differentiates it from its competitors – leading to more awareness, more impact and more visitors. Full details can be found on the following link:

<http://www.visitkentbusiness.co.uk/index/marketing/branding/>

Other News

Trends Update (149 - Visit Britain)

- During February BAA's six UK airports handled 0.2% fewer passengers than a year before. Traffic on routes between Heathrow and India increased 10% on last February; however North Atlantic traffic to/from BAA airports was down 1.5%. European scheduled traffic increased by 1.4%
- The rate of unemployment in the UK increased to 8.0% in the three months to February
- UK consumer price inflation increases to an annual rate of 4.4% in February
- According to a 2010 Deloitte Global Hotel Performance report London was ranked third for room occupancy behind Sydney and Seoul. London was ranked 9th in terms of Revenue per Available Room and 14th in terms of room rates

BBC Weather for February:

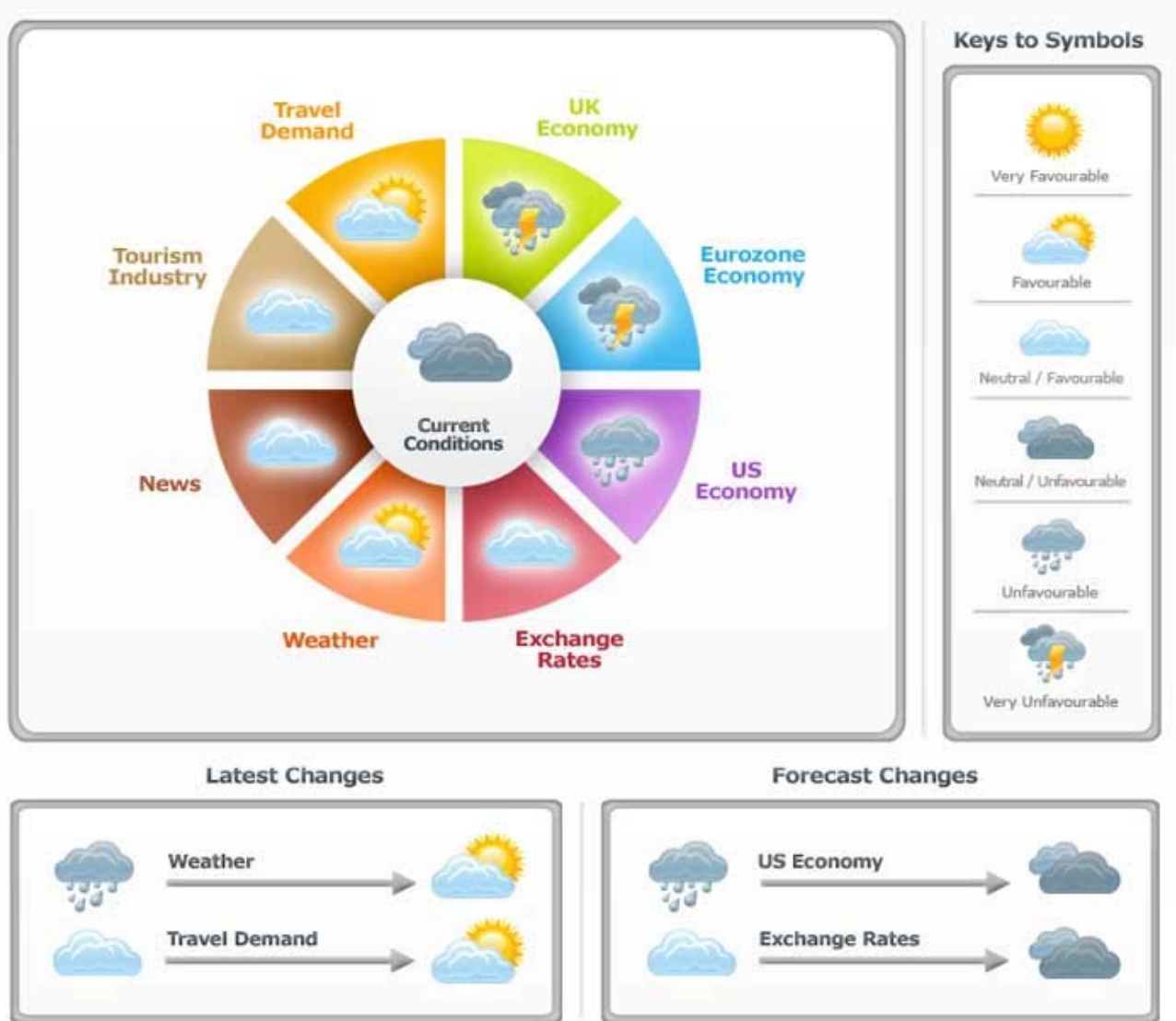
According to the BBC, the UK mean temperature for the month was about 2.0 °C above the 1971-2000 average, and it was particularly mild in central England. It was the mildest February since 2002 and the 9th mildest in the last 100 years.

Visit Kent's Business Barometer

The Business Barometer is a monthly performance snapshot of over 100 Kent tourism businesses



Trends Update (147 - Visit Britain)



Business Barometer Contacts:

If you would like to be part of the Business Barometer process, or have any comments on its content, please contact Tracey Parker, Research Manager tracey.parker@visitkent.co.uk 01227 812905