



Visit Kent's Business Barometer 2009 End of Year Report

2009 Summary

2009 was a good year in many ways for tourism and for many attractions it was better than expected. TICs received nearly 1.2 million visitors face to face. Accommodation coped better than expected in the economic climate. Factors such as the exchange rate between the Pound and Euro meant UK visitors tried out a 'staycation' rather than overseas holiday, and European visitors found Kent good value for money. Business tourism providers found opportunities in the leisure market to counter their downturn in numbers. Although channel crossings were down slightly overall this year, signs of an increase in inbound European visitors, and strong responses to promotional campaigns have meant a stronger start to 2010.

End of year comparison 2008/9

Kent Attractions Visitor Numbers	Up 7%
* based on the Business Barometer sample	
Kent Serviced Accommodation	Down 3%
* provisional from Tourism South East	
Kent Self Catering Unit Occupancy	Down 1%
* provisional from Tourism South East	
TIC Visitor Numbers	Up 1%
* based on the Business Barometer sample	
Cross Channel Passengers	Down 3%
* based on Eurotunnel and Port of Dover feedback	

The Business Barometer system

Visit Kent's Business Barometer started in 1999, as part of the Transmanche Tourism Research Programme. The new enhanced monthly version began in June 2008 providing continuous monthly feedback to the industry. It continues to receive funding for its development through the new European funded programme SusTRIP (Sustainable Tourism Research and Intelligence Partnership)

The Business Barometer is based on feedback direct from the industry in Kent, and through timely monthly feedback helps to identify reasons for uplift or downturn in the market place to enable businesses to benchmark with others and respond to trends identified.

Visit Kent's Business Barometer is a unique feedback tool, offering 'real time' data, in sharp contrast to most tourism data which is not available until a year after collection.

Visit Kent's **Business Barometer**

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





Monthly performance

The Business Barometers each month indicated a snapshot of how Kent was faring. Although the year started slowly, it soon became clear that many positive underlying trends for Kent were in evidence.

- ◆ **January** – Attractions doing well, but a slow start to the year.
- ◆ **February** – 1 week's snow meant closure or problems with access.
- ◆ **March** – Increases in overseas visitors to self catering accommodation
- ◆ **April** – Good weather and Easter combined meant an increase in visitors to attractions. Cross channel passenger numbers up, and visits to TICs.
- ◆ **May** – Fine weather. TICs received more face to face enquiries. Business Tourism contacts reported a downturn in bookings and enquiries.
- ◆ **June** – Kent joint driest county this month and attraction visitors were 9% up. Research showed 'credit crunch' might actually be benefiting their business.
- ◆ **July** – Continuing good weather for Kent. Business Tourism was still reported as down but leisure bookings were helping to counter this.
- ◆ **August** – The 'staycation' hit Kent, self catering occupancy up 18% mainly due to UK bookings. TICs increases in footfall from Europe, more cruise ships
- ◆ **September** back to school routines, and so less 'staycation' impact. An increase in visitors from the USA. A small rise in coach numbers.
- ◆ **October** - Particularly good weather, day visits were booming especially at half term. TICs 13% rise in face to face visitors, Attractions 14% up.
- ◆ **November** – the wettest November since 1914, and a poor month for all sectors of the industry that remained open.
- ◆ **December** – Snow affected West Kent closing attractions and drawing the year to a quiet end with many cancelled accommodation bookings

Visitor Attractions

2009 was a good year for most attractions, particularly charging attractions, with an overall 7% increase in visitor numbers across the year compared to 2008. Many attractions are weather dependent and suffered during the wet month of November, and the snowy months of February and December.

The focus of leisure activity was still predictably in April for Easter, July and August for summer holidays and October for half term. The notable increases in visitor numbers directly relate to the fact that in 2009 good weather was experienced across Kent at these holiday times, whereas in 2008 the weather was much poorer on key dates. The 'staycation' aspect also meant that these holiday times were spent more prevalently in the UK.

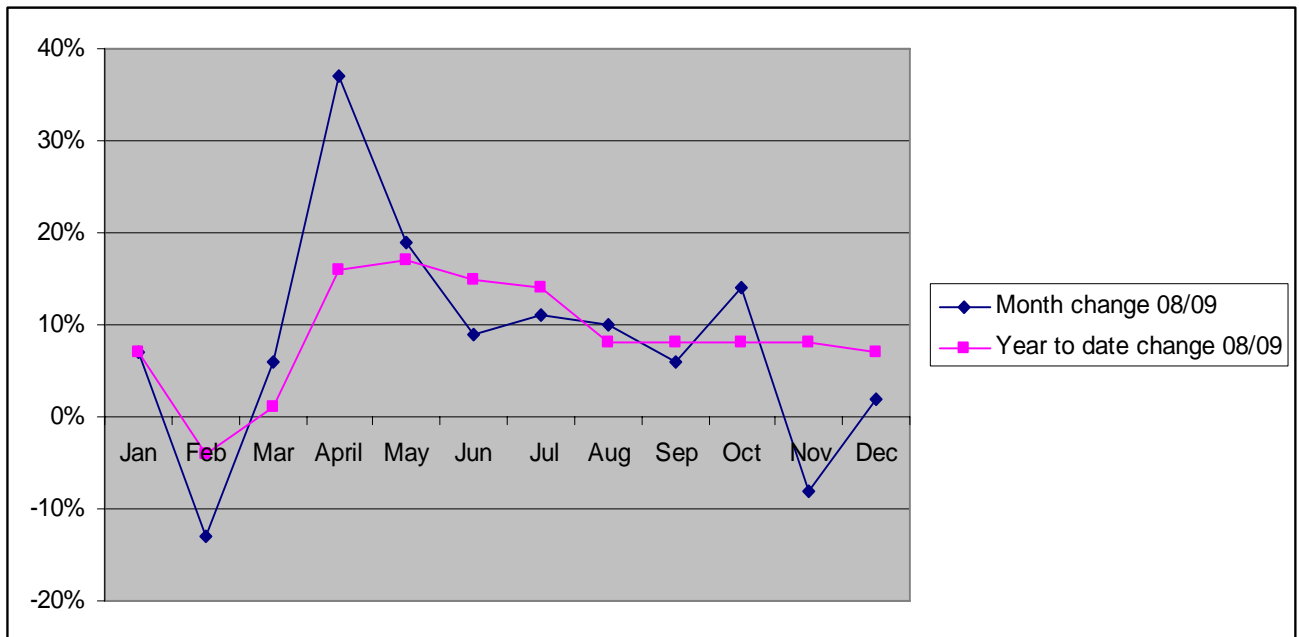
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Visitor numbers to attractions in Kent (Business Barometer sample)



The combination of mostly favourable weather, good value for money and a growing enthusiasm for healthy outdoor activity helped to make 2009 a good year for Bedgebury, with visitor numbers up and feedback positive.

Peter D'Aguilar, Bedgebury Pinetum

2009 has been a remarkable year for English Heritage properties in Kent; not only have we successfully launched two major new projects at Dover Castle and the Home of Charles Darwin, visitors numbers have continued to grow across the South East. The launch of the Great Tower at Dover Castle has been a highlight for 2009 and we now look forward to continuing this success with further developments underway for 2011.

Adam Bray, English Heritage.



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“Chartwell has had a wonderful year – having welcomed 193,858 visitors, it’s been the second busiest year since the house opened to the public in 1966. We’ve put this down to the economic climate and people’s desire to get out and about and spend free time closer to home, although the special events we put on have been very popular and well-attended, and our groups and functions business is looking healthy too.

Phoebe Vincent, Chartwell



Cross Channel Carriers

The year started off with one of the cross channel tunnels out of action through the fire in September 2008. This affected crossing methods for some of the market at the beginning of the year, but on reopening of the tunnel in February crossings gradually returned to nearer the balance found in August 2008 before the fire. Overall passenger numbers for the year were down 3%, cars down 1% and coaches down 9%.

Carriers	2008	2009	% change
Passengers	13,934,559	13,452,155	-3%
Cars	3,322,603	3,304,234	-1%
Coaches	104,677	95,152	-9%

An increase in inbound trips by European visitors was noted in April and July. In April, August, November and December Visit Kent was made aware of tactical promotions which had been successful in encouraging crossings, and helping to counter the effects of the recession.

"2009 was a challenging year but the Port of Dover’s performance remained extremely robust despite the fragile state of the UK economy. We were starting to see some growth over the last quarter of 2009 and early indications are that we will return to a positive, if steadier, economic growth pattern in 2010 as the market recovers. In the long term, significant growth is still anticipated and the Government still expects our freight traffic to double albeit it might take a few more years to get there. With this in mind, 2010 will still be a busy year for all at the Port."

Port of Dover.



Accommodation

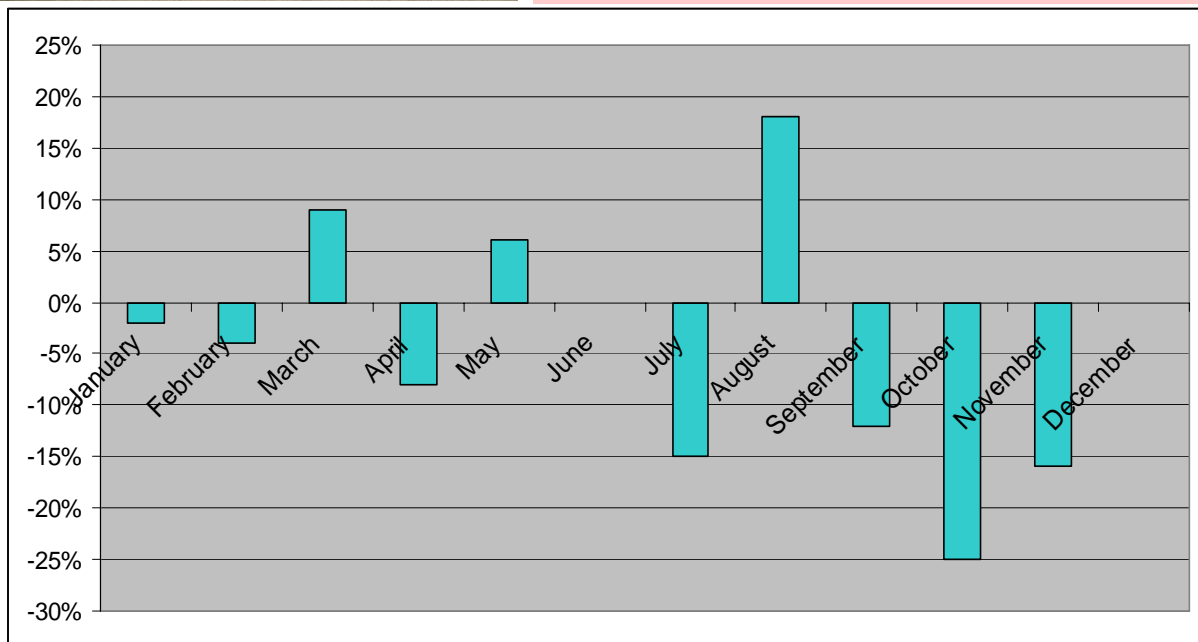
Self catering accommodation generally fared better than serviced accommodation in Kent. UK visitors on 'staycations' and European visitors benefiting from the favourable exchange rate explored self catering options around the county. Serviced accommodation that offered conference facilities suffered from a fall in business tourism, but for some this was countered by an increase in leisure customers.

Self catering accommodation was **1.5%** down on 2008 overall. March, May and August were strong for bookings, both from UK and European visitors. Unfortunately an insufficient sample of data was available in June and December for self catering properties to identify the change



"2009 was a difficult year to second guess because the early bookings did not come in the New Year as they usually do. However as each season or holiday period arrived all the cottages booked! As widely predicted there were record numbers of European visitors. 2009 was a nail biting year but it ended up breaking all the records!"

Sarah Wood, Mulberry Cottages



An increase in overseas visitors to self catering accommodation was most noticeable in the early months of the year i.e. February, March, and April.

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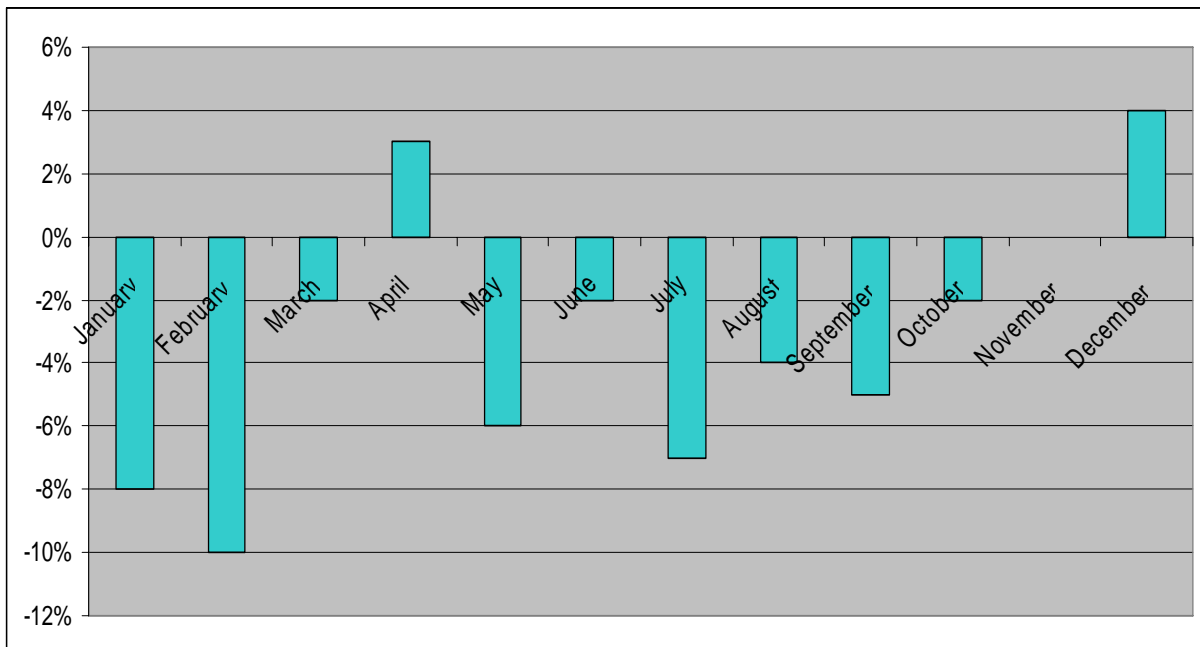


Serviced accommodation was down **3%** overall on 2008. Easter and Christmas leisure visitors helped to support the serviced providers who were experiencing fewer business customers.



We had a tough first quarter of the year, with sales and rate dropping significantly. Business levels improved from April - June in line with the previous year. We finished the last 6 months up on the previous year."

Declan Kelly, ABode Canterbury



By the middle of 2008 forward bookings and enquiries were showing signs of a significant downturn for 2009. Therefore we invested in improving our service levels, revamping our restaurant and bar and put money into an aggressive marketing programme that included a consistent digital marketing programme, upgraded website, improved accommodations packages with added services and benefits and increased use of network partners in the UK and Europe. 2009 turned into a great success for us. A 34% growth in leisure business and whilst corporate struggled In the first half we finished the year 3% up in this sector."

Matt Collins, The Bell Hotel, Sandwich

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Web visits

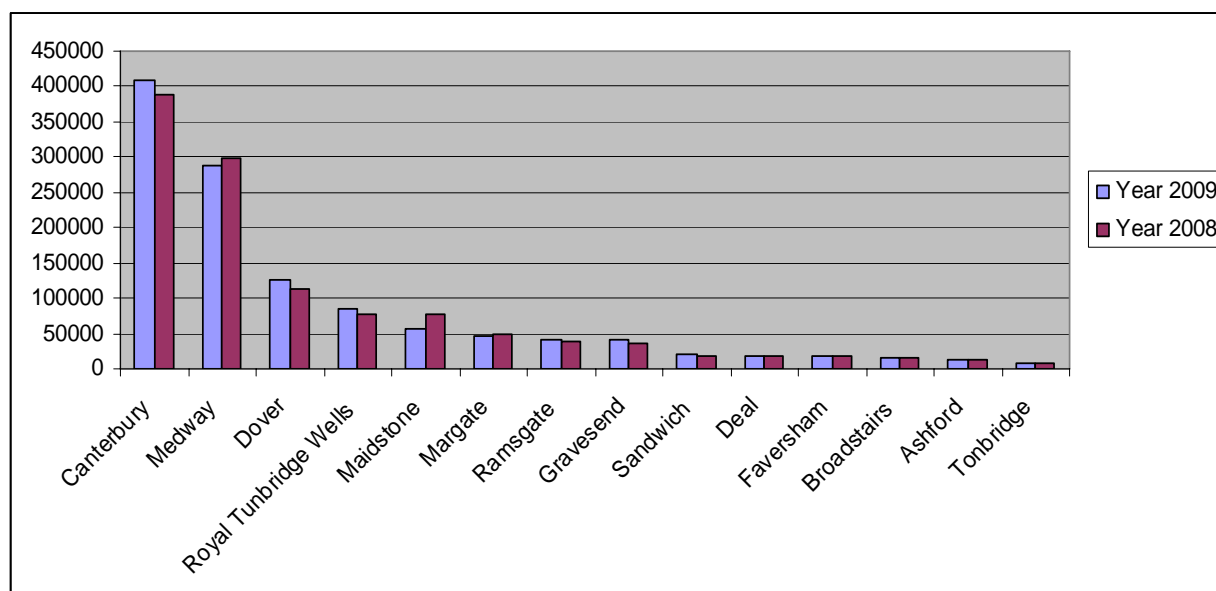
The consumer website www.visitkent.co.uk gives an indication of the level of interest in Kent as a destination, and during 2009 Visit Kent saw an exceptional rise in the level of visits and page views compared to 2008. Visits to the site, and therefore initial enquiries were up by 48%, and page views indicating visitors seeking more detailed information were up by 69%.

	Visits	Page views
2008	1,209,178	6,800,719
2009	1,685,246	11,461,355
% change	+48%	+69%

Tourist Information Centres

Overall nearly 1.2 millions visitors were seen by Kent's TICs. Canterbury and Medway have the highest footfall in the county.

Number of face to face visitors to each TIC



Please note that TICs are not directly comparable with each other, but their figures are comparable year on year.

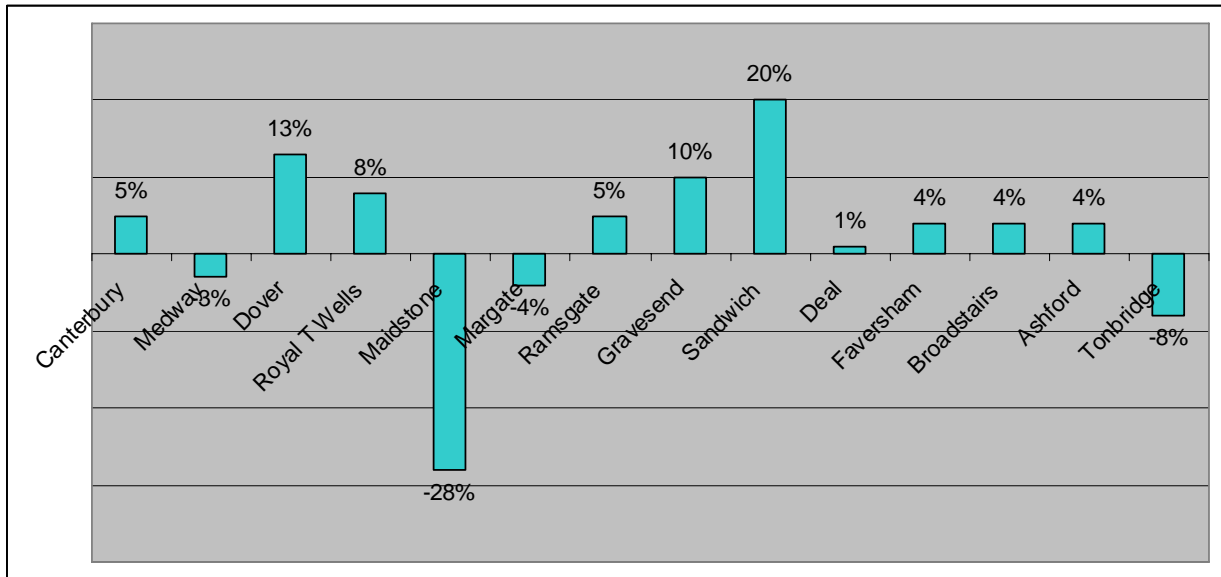
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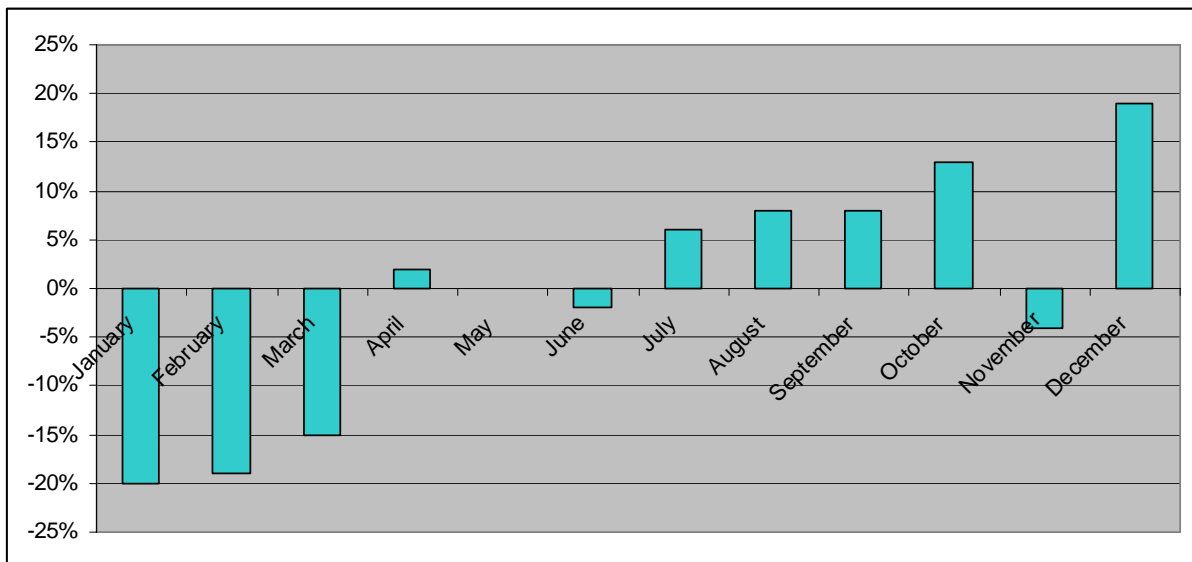


Year on year change at each TIC



All TICs – year on year comparison 2008/09

The year started off nervously for the TICs, and from January to March, visitors were dramatically down from 2008. However, indications from the monthly Barometers were that demand for day trip and short break information from TICs was increasing. This was across the board, from European visitors and from UK visitors on a staycation. Face to face information requests grew from July onwards, with only a dip in November due to particularly bad weather.



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"Investing in your future" Cross-border Cooperation Programme 2007-2013 Part-financed by the European Union (European Regional Development Fund)



The Headlines for the year end (provisional data from Visit Britain)

- ◆ Despite the snow causing disruption to travel in December, the number of overseas residents visiting the UK was 3% higher compared with December 2008. The full-year picture is that 7% fewer overseas visitors came to the UK in 2009 (29.57 million) compared to 2008 (31.89 million).
- ◆ Despite this 7% decrease in visits, spending in 2009 was 1% higher (in nominal terms) than in 2008. In total, visitors spent £16.48 billion in the UK in 2009.
- ◆ For the most-part, both the Euro and the US Dollar were stronger against the Pound during 2009 than during the previous three or four years, meaning that visitors' currencies went further

Contacts

For more information about the Business Barometer, or to participate in the 2010 surveys please contact Tracey Parker, Research Manager on 01227 862792, or Alison Hughes, Research and Administration Assistant on 01227 862782, or email on research@visitkent.co.uk.

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