

Visit Kent's Business Barometer December 2010

December 2010 was the coldest for 100 years with heavy snow across most of Kent for most of the month. This impacted severely upon every part of the tourism sector in Kent.

Comparison December 2009/2010

Attraction visitor numbers	Down 11%
TIC Visitor Numbers	Down 4%
Cross Channel Passengers	Down 9%
Serviced Accommodation Smaller hotel, B&B and Guesthouses	Down 15%
Serviced Accommodation Larger Hotel Accommodation Occupancy for June <small>Source 2010 STR GLOBAL Ltd</small>	Down 10%

Topline Summary

- Larger hotel accommodation ended up overall 2.9% up on 2009 in spite of a difficult December.
- Overall attractions saw a 3% fall in visitor numbers in Kent in 2010 compared to 2009 having recovered well from a very poor start to the year.
- 44% of attractions stated that the coach market was up for them in the fourth quarter.
- TICs experienced an increase of 14% in emails and postal enquiries
- The VAT increase due in January was showing as a key concern for the industry
- Visit Kent's consumer website visits increased by 36% compared to 2009, and page views were up by 170% which shows extended use of the site when visited.

Attractions

Kent visitor numbers in December

Visitor numbers	2010	2009	% change
	141,758	158,887	Down 11%

Kent visitor numbers – Year to date

The 'year to date' visitor figures from our sample (excluding retail) are:

	2009	2010	% change for month	Year to date Totals 2009	Year to date Totals 2010	% change for year to date
Jan	98,955	81,026	Down 18%	98,955	81,026	Down 18%
Feb	143,756	126,612	Down 12%	242,711	207,638	Down 14%
Mar	231,633	216,473	Down 7%	474,344	424,111	Down 11%
Apr	429,492	438,581	Up 2%	903,836	862,692	Down 5%
May	404,413	359,436	Down 11%	1,308,249	1,222,128	Down 7%
June	373,958	399,201	Up 7%	1,682,207	1,621,329	Down 4%
July	412,685	426,321	Up 3%	2,094,892	2,047,650	Down 2%
Aug	613,521	585,205	Down 5%	2,708,413	2,632,855	Down 3%
Sep	287,445	273,664	Down 5%	2,995,858	2,906,519	Down 3%
Oct	250,878	253,982	Up 1%	3,246,736	3,160,501	Down 3%
Nov	122,024	128,820	Up 6%	3,368,760	3,289,321	Down 2%
Dec	158,887	141,758	Down 11%	3,527,647	3,431,079	Down 3%



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Range of performance amongst attractions overall

18 attractions were down ranging from 3% down to 54% down. 4 attractions were up ranging from 8% to 66%.

Performance according to attraction type, % change December 09/10

Historic Building/ Heritage Attraction	Museum	Tour and transport	Other
Down 10%	Down 18%	Down 13%	Down 3%

Performance according to size, % change Dec 09/10

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
Down 34%	Down 10%	Down 2%	Down 10%	Down 8%

Performance according to cost % change Dec 09/10

Charging	Free
Down 10%	Down 15%

Performance according to location, % change Dec 09/10

Coastal	Rural	Urban
Down 34%	Down 11%	Down 10%

Factors affecting visitor attraction results

Education themed week in 2010 cancelled due to bad weather.

Heavy snow

66% up due to Christmas market in grounds. Not up as much as expected due to closure for snow at start of the month.

Reduction by 17% which is surprising. Probably due to competition from other events and attractions taking place in December.

Heavy snow, closed to public on 3 days.

Many cancelled groups due to weather and fewer people off street due to weather

Large wedding group in 2009 and poor weather 2010

Month's gallery exhibition attracted less interest.

This year weather affected the attraction badly meaning we lost 4.5 trading days due to snow and ice, which accounts for 22% of our business days

Interest in local produce, Christmas & New Year

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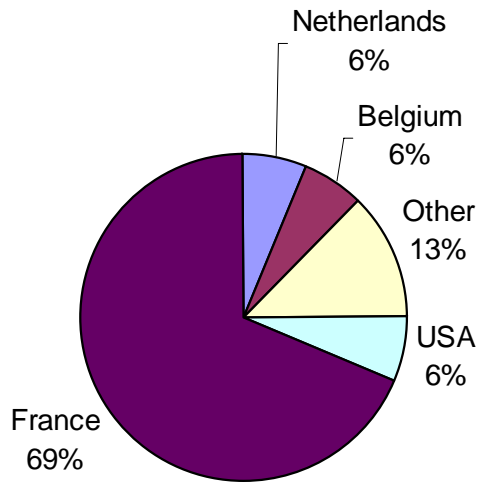
The Business Barometer is a monthly performance snapshot of over 100 Kent tourism businesses





Overseas visitors to attractions in December

85% of visitors were from the UK, 4% Long haul visitors and European visitors 11%. The most prominent visitor group in December was French.



Accommodation

Serviced Accommodation

Smaller hotels, guest houses and B&B's

Unsurprisingly occupancy has fallen considerably in Kent in December 2010 due to the extreme weather conditions and difficulties with transport links. Many accommodation providers reported group and individual cancellations for the month. Some were able to make up for part of this with local rebooking where guests were stranded. Rural providers suffered more harshly than seaside or urban providers.

RIBOS (www.ribos.co.uk)

Kent occupancy December

	Dec 2008	Dec 2009	Dec 2010
Kent	40.7%	44.8%	29.9%

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Occupancy according to location

Location	Occupancy
Countryside/village	17%
Seaside	36%
Large town/city	36%
Small town	25%

Occupancy according to business type

Location	Occupancy
Bed and Breakfast	20%
Guest House	30%
Hotel/Inn	37%

Larger hotels Source 2010 Smith Travel Research, Inc/STR Global, Ltd.

Occupancy (%)	2010											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
This Year	49.7	64.9	59.8	71.3	75.9	78.1	86.4	82.3	80.1	72.1	64.0	53.1
Last Year	48.9	61.9	56.3	68.7	74.0	74.1	80.6	80.1	73.0	71.6	65.2	58.8
% Change	1.7	4.8	6.2	3.8	2.6	5.3	7.2	2.7	9.7	0.6	-1.8	-9.7

Year To Date occupancy		
2008	2009	2010
67.5	67.8	69.8
67.9	67.5	67.8
-0.6	0.5	2.9

National accommodation occupancy up to November 2010 is available on the following link from Visit England: [Accommodation Occupancy England November 2010](#)

Cross Channel Carriers

These figures are the combined totals for the Port of Dover and Eurotunnel and show that the snow affected the channel crossings quite dramatically, especially cars and passengers as they were unable to get to the ports to cross.

December	2009	2010	% CHANGE
Passengers	1,117,695	1,014,093	Down 9%
Cars	277,225	240,717	Down 13%
Coaches	7,472	7,428	Down 1%

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TICs

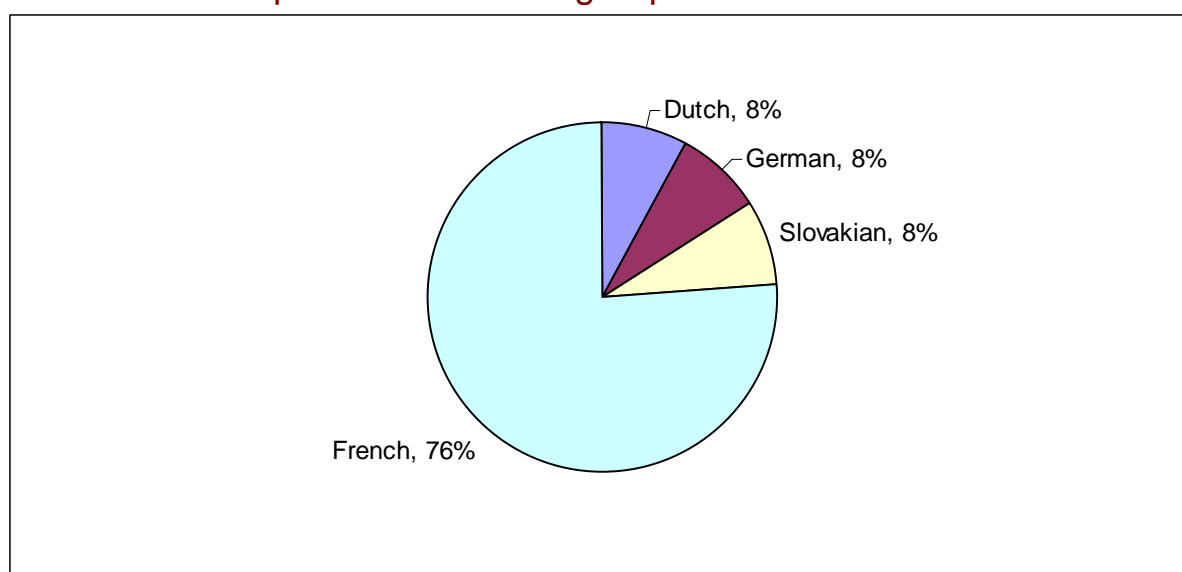
TICs Comparison December 2009/10

Name of TIC	Footfall Dec 2010	Footfall Dec 2009	% change Dec 09/10	Phone Calls Dec 2010	Phone Calls Dec 2009	Postal/emails Dec 2010	Postal/emails Dec 2009
Ashford	417	643	-35	170	186	248	238
Canterbury	23384	32091	-27	551	748	77	122
Deal	405	767	-47	36	68	124	215
DFH&RM	0	0	n/a	358	411	111	132
Dover	2601	2742	-5	165	155	416	243
Faversham	934	899	4	92	79	103	35
Gravesend	1558	2016	-23	189	281	257	207
Maidstone	3658	4132	-11	279	314	14	24
Medway	33024	22350	48	802	918	218	228
Royal T Wells	660	3099	-79	271	296	279	179
Thanet	1146	2396	-52	49	133	19	6
Tonbridge	941	737	28	410	254	0	0
Kent	68728	71872	-4	3372	3843	1866	1629

Please note that under the current economic conditions many TICs have had changes to their structure, location, opening hours and staffing levels. Direct comparison year on year is therefore more difficult to make.

Nationality of TIC visitors

The top overseas visitor groups to TICs in December





Nationality of TIC visitors

Name of TIC	% Domestic Visitors	% Long Haul visitors	% European visitors	Euro visitors compared to December 2009
Ashford	89	3	8	Down 2%
Canterbury	60	5	35	No figs 2009
Deal	95	1	4	Same
DFH&RM	85	1	14	Down 6%
Dover	65	14	21	Up 20%
Faversham	93	3	4	Down 15%
Gravesend	88	4	8	Up 7%
Maidstone	95	0	5	Up 4%
Medway	70	5	25	Up 5%
Royal T Wells	99	0.5	0.5	Down 4.5%
Thanet	99.5	0	0.5	Down 0.4%
Tonbridge	97	1	2	Down 5.5%

Factors affecting visitor numbers to the TICs in Dec 2010

Factors affecting visitor numbers
Snow caused office closure on more than one occasion. Customers cancelling trips due to weather.
The main factor affecting the visitors was the very cold weather. There was snow and ice for a longer time than usual. Just before Christmas it was impossible for visitors to cross the channel! And most of the population did not go out unless it was absolutely necessary.
The figures are down this December as we were affected by the bad weather conditions and we were open for 2 hours less each day during this month due to staff shortages.
Strong euro bringing Continental shoppers in. UK residents staying home, but VFR is on the up.
Sold tickets for local Pantomime. Snow at the start of the month.
This month we continued to have many enquiries/bookings for National Express, which we are now agents for.
Exceptional bad weather conditions resulting in reduced opening hours of the TIC as well as visitor numbers
Up 48% mainly due to Christmas Market in Rochester and significant growth in coach arrivals in December.
Snow caused office closure on more than one occasion. Customers cancelling trips due to weather.



Business Tourism

Insufficient data to report for this month

Confidence Survey

Attractions' Confidence for the 4th Quarter of 2010

Top three concerns for Kent attractions overall in Dec	
UK Economic Climate	78%
Weather	67%
VAT Increases	39%

Attractions' performance in the last quarter compared to the same period last year	%
Much better	6%
Better	6%
Slightly better	22%
About the same	33%
Slightly worse	11%
Worse	11%
Much worse	11%

Attractions expectations for the next quarter	
Much better	6%
Better	0%
Slightly better	33%
About the same	50%
Slightly worse	11%
Worse	0%
Much worse	0%

Coach market to attractions

Coach market up	Coach market same	Coach market down
44%	33%	23%



TICs' Confidence for the 4th Quarter of 2010

Top three concerns for Kent TICs overall in Dec
UK Economy (75%)
VAT increase (50%)
Weather (42%)

TIC performance in the last quarter compared to the same period last year	%
Much better	17%
Better	0%
Slightly better	17%
About the same	25%
Slightly worse	17%
Worse	8%
Much worse	17%

TIC expectations for the next quarter	%
Much better	8%
Better	17%
Slightly better	25%
About the same	17%
Slightly worse	33%
Worse	0%
Much worse	0%

Visit Kent News

Visit Kent Research

The Sustainable Tourism Research Intelligence Partnership (SusTRIP) programme is due to hold its next research forum on 12th May in Kent. The Interreg Two Seas funded programme, led by the research team in Kent, has partners in Nord Pas de Calais, Flanders and Holland, and the partners will be gathering in May to discuss methodology on the collection of baseline data for benchmarking across the Two Seas area.

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The 2009 Cambridge Model for Kent (funded by SusTRIP) which measures the economic impact of tourism on Kent has just been completed on our behalf by Tourism South East and shows a strong 10% growth in income generated for the county. The economic impact is measured at just under £3.2 billion (including retail) supporting 63,261 jobs.

Visit Kent Marketing

Kent Contemporary success brings in £18 million

Kent Contemporary, our innovative marketing campaign backed by Kent County Council, has delivered an £18 million fillip to the county's economy in its first five months. Detailed independent research into the campaign, conducted by Tourism South East, has revealed a 47:1 return on investment. According to the research, from May to October the campaign generated 79,000 additional overnight trips and short breaks to the county, 221,260 additional visitor nights worth almost £11 million, and 196,375 day trips from outside Kent with visitors spending £7,853,000. Furthermore, but not included in the economic impact figures, the campaign encouraged local residents to take more overnight trips and day trips within the county with a total value of just under £11 million.

The campaign photograph of Hever Castle proved to be the most memorable with Botany Bay taking second place. However, research respondents said they found the image of Botany Bay the most appealing and it was the one most likely to encourage them to visit Kent.

We are currently busy planning for the 2011 campaign. To find out how you can be involved in the campaign please contact lynette.crisp@visitkent.co.uk

Visit Kent Websites

The consumer website showed strong activity throughout December with an increase in visits compared to 2009 of 36%, and an increase in page views of 170% (over 1.4 million page views for the month)

Consumer website www.visitkent.co.uk

Visits Dec 2009	Visits Dec 2010
130,929	177,860

The B2B website visits have grown by 3%, with page views by 27%

B2B website www.visitkentbusiness.co.uk

Visits Dec 2009	Visits Dec 2010
967	998

Other News

Weather

According to the BBC, December 2010 was the coldest December in 100 years, with snow falling in most areas of the UK and temperatures struggling to get above freezing during the day.

A combination of sustained low temperatures and frequent snowfalls affected everyday life in most parts of the UK for much of the month. The emergency services, local authorities, transport organisations and utilities were put under great pressure. Gatwick airport's runway was closed for several days.

It was also a dull month in southeast England with around 60% of average sunshine.

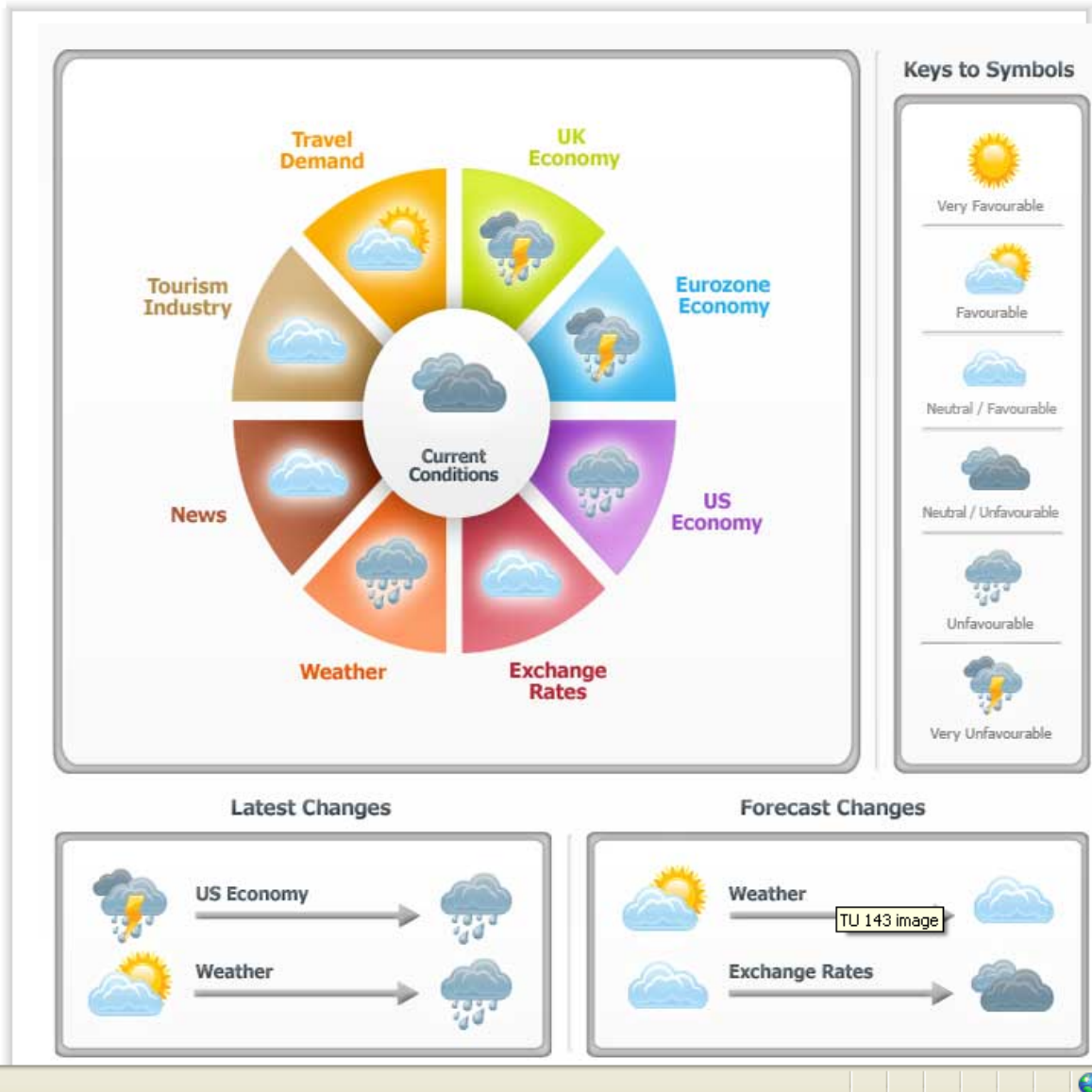
International Passenger Survey (Visit Britain) – headlines for December 2010

- In December 2010, the number of overseas residents visiting the UK was 7% lower compared with December 2009. There was heavy disruption to transport due to the snow. Looking at the whole of 2010, visitor numbers fell 1% compared to 2009 (ending 2010 at 29.6 million), whilst visitor spending was unchanged in nominal terms (£16.7 billion in 2010).
- The Euro was 6% weaker against the Pound in December 2010 (compared to December 2009) but remained strong compared to the previous three or four years. On average, £1 cost €1.39 in December 2007, but in December 2010 £1 cost just €1.18. The US Dollar was 4% stronger against the Pound in December 2010 compared to December 2009. £1 cost \$2.02 in December 2007 but cost just \$1.56 in December 2010.

Visit Britain – Tourism Trends - Update 146

- According to STR Global at the end of December 14,061 hotel rooms were 'in construction' in the UK, with 38% of these rooms being in London – the number of rooms being constructed in the UK is almost double that of Russia, which sits in second place in the construction league table
- According to TRI Hospitality Consulting during December London chain hotel occupancy stood at 76.4%, unchanged on a year before) with regional occupancy at 57.2%, down from 58.7%. Average room rates in London were 8.8% up on a year before compared with an increase of 1.0% in the provinces.

Trends Update 144 - 21 December 2010



- ◆ The Business Barometer is produced by the Research Team at Visit Kent. Contact Tracey Parker, Research Manager on 01227 812905, tracey.parker@visitkent.co.uk or Alison Hughes, on 01227 812900, alison.hughes@visitkent.co.uk.