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Visit Kent's Business Barometer December 2008

Welcome to the last Business Barometer of 2008 produced by Visit Kent's research team. Within this month's Barometer we have included overall summary figures for the June to December 2008 period, since the new system began. This still covers a good amount of this year's season and gives an overview of Kent's performance in a difficult economic climate. If you still want to take part but have not yet submitted your data, whether you are an accommodation provider, attraction, or carrier, please contact Tracey Parker on 01227 862792.

Kent Headlines - Comparison December 2007/2008

Kent Attraction Visitor Numbers	- Down 6%
Kent Serviced Accommodation Occupancy	- Up 1%
Kent Self Catering Unit Occupancy	- Up 23%
TIC Visitor Numbers	- Down 13%
Cross Channel Passengers Port of Dover	- Up 12%
Cross Channel Passengers Eurotunnel*	- Down 42%

(Please be aware that this is due to the fire in September)

Weather December 2008 (Source www.bbc.co.uk)

According to the BBC, in December the weather was generally cold at first then milder, and mainly dry towards Christmas before turning very cold by the New Year. Rainfall was mostly below normal. Sunshine was generally above or well above normal. It was the coldest December since 2001.

England Mean Temperature Series	0.8°C below average and the coldest December since 2001, when 3.4 degrees C was recorded.
England Rainfall Series	69% of average and the driest December since 2001, when 39.4 mm was recorded.
England Sunshine Series	165% of the average and 2 nd sunniest December since 2001, when 75.7 hours was recorded

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Attractions December

Kent visitor numbers

This month is out of season for a number of our contributing attractions, and the sample size will be smaller during the winter months as some close until the spring. This should be taken into account when examining the data below. For December, the visitor numbers for the 20 attractions submitting were:

Visitor numbers	December 2007	December 2008	% Change
	98,436	92,695	Down 6%

Range of performance amongst attractions overall

12 attractions experienced a fall in visitor numbers, ranging from 36% to 2%. The reasons for falls in visitor numbers included more restricted opening hours, or fewer events happening due to 'cut backs', poor weather and the recession. However, in spite of falling individual visitor numbers, some experienced good group visits, and a couple of attractions reported increases in visitor spend.

6 attractions experienced a rise, ranging from 5% to 406% (although this was due to a new event and an increase in opening hours in December). The reasons for increases in visitor numbers were put down to increased events, better signage and a surge in European day visitors.

Performance according to attraction type

Gardens	Historic Building/ Heritage Attraction	Museum	Tour/Transport attraction	Zoo/ Animal Attraction	Outdoor Activity water sports	Other
Insufficient Sample	Down 6%	Up 4%	Down 9%	Up 8%	Down 7%	Down 5%

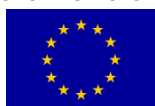
Many museums are free and so have maintained their market share of visitors during December, even experiencing a 4% rise. Zoo/Animal Attractions too seem to have experienced a good month. Outdoor activity and water sports, historic buildings and tour/transport attractions all seem to have suffered a poor month, which may be in part due to the weather, but also the continuing downturn in the economic climate.

Performance according to attraction location

Coastal Insufficient Sample	Rural Down 5%	Urban Down 6%
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Many of the coastal attractions were closed in December, and so there were insufficient numbers submitting for analysis. For rural and urban attractions, the situation was similar, with each experiencing a downturn overall.

Performance according to attraction cost

Charging	Free
Down 4%	Up 1%

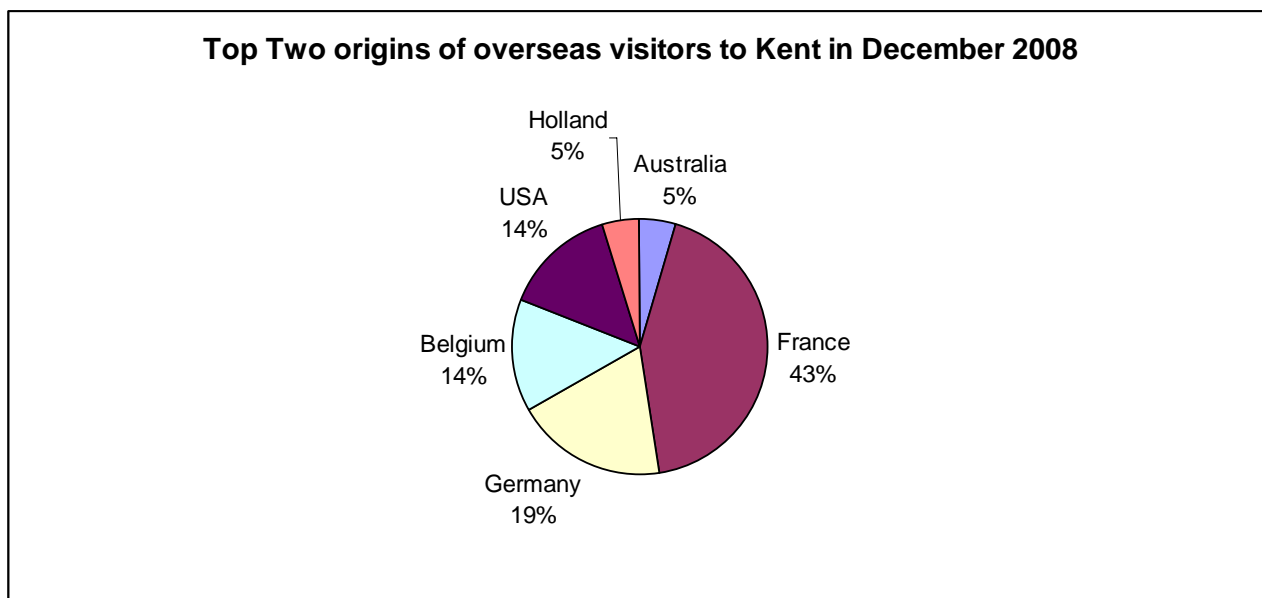
Charging attractions in December were being affected more dramatically than free attractions, as perhaps some visitors switched to more economical alternatives for visits. This is only to be expected in the current economic climate.

Industry concerns – attractions

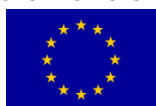
Top three concerns for attractions overall
Economy
Weather
Costs

Overseas visitors to attractions in December

Each attraction is asked what its top two origins of overseas visitors are each month. 9 attractions gave us their figures on this question, and the percentage of overseas visitors ranged from 1% to 65%. The results are below for December, showing that 43% of those that receive overseas visitors cited France as in their top two, and German visitors were the second most prevalent. This increase in French visitors in December is quite usual as French schools take their educational trips mainly during November and December.



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National Data on attractions (Source: Visit Britain)

The Quarterly Attractions Monitor for October, November and December has not yet been released by Visit Britain

Attractions Confidence for the 4th quarter 2008

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 December contained the confidence questions for the 4th quarter of 2008. This has then been compared to the 3rd quarter confidence survey and analysed in each section.

Expectations for the next quarter

Rural expectations for Jan to March 2009 were very positive with all expecting either the same levels of business or an increase. The same could not be said for urban attractions, as none were expecting a rise in business, 60% expected it to be the same as the September to December quarter, and 40% expected it to be worse.

4th Quarter September to December 2008

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%

When comparing quarter 4 to quarter 3, it can be seen that in fact rural attractions have become more confident and urban attractions far less confident of an improvement in business. However, most businesses in the 4th quarter still expect January to March 2009 to be about the same rather than down. This is very positive in the face of a recession for other industries.

3rd Quarter June to August 2008

Location	Expectations Up	Expectations Same	Expectations Down
Rural	47%	32%	21%
Urban	35%	15%	50%
Coastal	33%	0%	66%
Overall	38%	16%	46%

Coach market to attractions

The coach market has remained pretty constant, and where UK business has perhaps been down in some areas, it has been replaced by overseas clients.

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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%

This resilience is seen in the comparison between quarters, as the coach market has held firm into December.

Coach market 3rd Quarter June to August 2008

Location	Coach Market Up	Coach Market Same	Coach Market Down
Rural	37%	42%	21%
Urban	35%	45%	20%
Coastal	0%	67%	33%

Attractions Industry concerns

This has been broken down into attraction locations as there is some difference in December between locations and their concerns. After the usual concerns about the economic climate and the weather, for rural attractions the transport network was a major concern, and for urban attractions, the exchange rate.

Top three concerns for rural attractions	Top three concerns for urban attractions
1. Economic Climate	1. Economic Climate
2. Weather	2. Weather
3. Poor Transport network	3. Weakness of pound

Attractions summary for June to December 2008

In spite of a difficult year, Kent attractions have held up well against poor economic conditions. Overall, visitor numbers between June and December compared to 2007 were 1% down.

Performance according to attraction type

Gardens	Historic Building/ Heritage Attraction	Museum	Tour/Transport attraction	Zoo/ Animal Attraction	Outdoor Activity water sports	Other
Up 13%	Down 1%	Down 2%	Up 2%	Up 2%	Down 12%	Down 5%

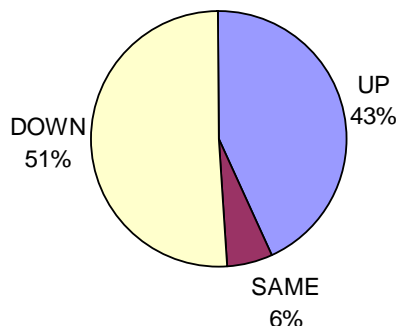
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Attraction Visitor Numbers, Jun-Dec 07/08



Performance according to location

Coastal	Rural	Urban
6% Up	3% Up	7% Down

Coastal and rural attractions seem to have done very well in comparison to urban attractions. This may be because a greater percentage of the urban attractions are free, and as can be seen by the table in the next section, free attractions fared worse than charging attractions. It may be that day visitors are being more selective and making their day out more of an event by going to the larger charging attractions.

Performance according to charging status

Charging	Non Charging
0.4% Down	6% Down

Surprisingly non charging attractions fared worse than charging attractions overall for the June to December period. Many free attractions are museums, or smaller more voluntarily run attractions, and it may be that these have found it harder to put special measures in place to beat the recession.

Accommodation

Kent serviced accommodation December 2007/8

District serviced accommodation	% room occupancy December 2007	% room occupancy December 2008	% change for month December	Length of stay Dec 2007	Length of stay Dec 2008	Change for month Dec
Ashford	Insufficient sample	44.5	n/a	Insufficient sample	1.4	n/a
Canterbury	41.4	33.4	7% down	1.5	1.3	0.2 down
Dover	44.0	45.5	1.5% up	1.6	1.2	0.4 down
Maidstone	Insufficient sample	72.0	n/a	Insufficient sample	2.0	n/a
Medway	Insufficient sample	34.1	n/a	Insufficient sample	1.7	n/a
Sevenoaks	18.3*	30.6	12.3% up*	2.5	2	0.5 down
Shepway	36.2	32.9	3.3% down	1.8	2.2	0.4 up
Swale	32.2	31.7	0.5% down	2.1	1.7	0.4 down
Thanet	36.4	30.6	5.8% down	1.9	1.9	Static
Tonbridge & Malling	Insufficient sample	Insufficient sample	Insufficient sample	Insufficient sample	Insufficient sample	n/a
Tunbridge Wells	40.7	50.4	9.7% up	1.8	2.7	0.9 up
Kent occupancy average overall	39.6	40.7	1.1% up	1.7	1.6	0.1 down

* please note that due to a data collection issue in December 2007, the figure for Sevenoaks is not reliable.

Tunbridge Wells' occupancy was 9.7% up, but the difference is probably mainly because of a poor December figure in 2007. According to the Kent data for 2007 & 2008, there has only been a slight rise in overseas guest occupancy in December from 2.9% to 3.2%.

Kent self catering occupancy data

As in November, there has been a startling rise in the percentage of overseas residents staying in our self catering accommodation rising from 41% to 63%. Also, in December there was a net unit occupancy increase of 23%.

Self-Catering occupancy comparison data December 2007/8

	Average Stay	Net unit occupancy	Average Party size	% UK residents	% Overseas residents
Average December 2007	9.0	47.8	2.3	58.9	41.1
Average December 2008	6.8	71.0	2.6	37.1	62.9
Change from 07/08	-2.2	+23.2	+0.3	-21.2	+21.2

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There is no doubt from these figures that near European neighbours are taking advantage of the positive exchange rate with the pound sterling and searching for bargain accommodation and visitor experiences available in the UK at this time.

Accommodation Confidence – 4th Quarter

The accommodation **Quarterly Confidence Survey** for the 4th quarter from September to December 2008 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.

Accommodation business expectations

Accommodation providers were more positive about the next few months this quarter, and expectations were up for both rural and urban accommodation providers. Coastal accommodation providers were less positive about the near future, but for Kent overall, expectations for the same or an increase in occupancy in 1st quarter 2009 were up from 50% to 52%.

4th Quarter business expectations

Location	Expectations Up	Expectations Same	Expectations Down
Rural	25%	17%	58%
Urban	29%	43%	28%
Coastal	25%	25%	50%
Kent	26%	26%	48%

3rd Quarter business expectations

Location	Expectations Up	Expectations Same	Expectations Down
Rural	0%	33%	66%
Urban	0%	50%	50%
Coastal	33%	33%	33%
Kent	11%	39%	50%

Accommodation industry concerns

Top three concerns for the accommodation providers
1. UK Economic climate
2. Exchange rates
3. Weather

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Other specific factors affecting the reporting accommodation businesses, and reported verbatim are:

POSITIVE FACTORS

Christmas

£: Euro encouraged near Europeans back later in the year. Niche market on farms. Personal pro-active marketing

Weddings in the locality

Foreign holidays and breaks are now more expensive as the £ is weak

More local integration has borne fruit as more local people are using our services

We still offer value for money & convenience.

Weakness of pound attractive for overseas visitors

People are choosing to holiday in the UK, and within the UK closer to home too.

Work at the Isle of Grain

Good advertisements by my Agents in England and Frankfurt

increase in European group trade incoming

Offering lower rates

The weak pound, and our good reputation

strength of Euro

pound against Euro

exchange rate Sterling/euro

Regular business

Pre-Christmas visits

Increased Leisure Rooms and Food Revenue

Resurgence in domestic tourism

Improved restaurant

More marketing

more business guests

NEGATIVE FACTORS

Fiddling around with the VAT for a short time "gain" was more work than it was worth!

Cost of supplies

The negative economic climate - no contractors staying during the week days, fewer people at the weekends as people conserve what money they have for Christmas

Monetary fears - especially cautious spending.

Inexpensive hotels have opened up locally

Insufficient Road Signing to main names of places further afield than the next town

economic climate having an impact on cut backs on expenses so therefore reduction of guest bedrooms

Smoking ban, cheap supermarket sales of alcohol, UK job losses and the general downturn in the economy

No local tourism support

economic downturn (had 2 cancellations from UK visitors badly affected)

Uncertainty and concerns in peoples finances.

Drop in Corporate Rooms Business

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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. No further data since the September occupancy data has been made available by Visit Britain at this point in time.

However, Travel Mole (Phil Davies, 27.1.09) reported on the less favourable picture for serviced accommodation and hotel breaks on a UK wide basis. The article claims that room rate, occupancy and rooms yield all fell for most in December, according to preliminary monthly figures from PKF Hotel Consultancy Services. Families also tended to stay at home, rather than taking festive breaks.

Serviced accommodation summary for Jan to Dec 2008

Tourism South East has recorded occupancy for Kent for the whole of 2007 and 2008 and so occupancy for the full two years can be reported. As can be seen by the complete tables below, room occupancy in Kent serviced accommodation rose by 3.5%. Bed space occupancy rose by 4.2%, but length of stay fell marginally. However, in the two annual summaries it also shows the rise in overseas guests from 6.3% to 12.2%.

Kent Serviced Accommodation Occupancy 2008					
	Room Occupancy	Bedspace Occupancy	% UK Guests	% OS Guests	Length of Stay
January	40.1	24.7	90.0	10.0	1.8
February	50.6	32.7	95.6	4.4	2.0
March	53.4	35.0	94.3	5.7	1.7
April	56.3	43.0	95.8	4.2	1.8
May	62.3	47.8	79.7	20.3	1.9
June	61.8	46.6	76.9	23.1	1.8
July	73.0	54.3	81.3	18.7	1.9
August	71.2	55.8	80.4	19.6	1.8
September	66.8	47.3	85.3	14.7	1.9
October	54.2	37.1	85.5	14.5	1.9
November	45.4	30.4	92.0	8.0	1.8
December	40.7	26.7	96.8	3.2	1.6
AVERAGE	56.3	40.1	87.8	12.2	1.83



Kent Serviced Accommodation Occupancy 2007					
	Room Occupancy	Bedspace Occupancy	% UK Guests	% OS Guests	Length of Stay
January	39.4	22.5	96.6	3.5	1.7
February	46.7	29.7	95.3	5.5	1.9
March	44.6	31.6	95.0	5.0	1.9
April	47.6	32.8	91.5	8.5	1.9
May	52.9	37.6	93.1	6.9	2.0
June	63.4	41.8	91.9	8.1	1.8
July	67.9	46.0	89.3	10.7	2.0
August	71.2	52.1	94.0	6.0	2.1
September	65.7	45.7	91.0	9.0	2.3
October	47.5	33.2	93.5	6.5	1.9
November	47.3	32.0	97.1	2.9	2.1
December	39.6	26.5	97.1	2.9	1.7
AVERAGE	52.8	35.9	93.8	6.3	1.9

Self Catering accommodation summary for Jan to Dec 2008

The year on year comparisons show that although party size and stay is down, unit occupancy is up by 3% overall in Kent, and overseas guests are up 5.6%, particularly noticeably in the final quarter of 2008.

Self catering accommodation occupancy for 2008					
	Average Party	Average Stay	Net Unit Occ	% UK	% OS
2008					
January	2.2	11.6	40.9	71.7	28.3
February	2.6	12.1	68.2	76.0	24.0
March	2.4	9.1	55.6	68.6	31.4
April	2.3	7.3	67.4	68.6	31.4
May	3.1	7.0	64.7	58.3	41.7
June	2.8	7.1	64.0	59.2	40.8
July	3.0	7.5	79.8	49.3	50.7
August	3.3	7.1	71.3	64.4	35.6
September	2.6	6.6	77.6	82.4	17.6
October	2.6	6.9	75.4	64.0	36.0
November	2.3	7.0	54.2	43.0	57.0
December	2.6	7.1	62.2	40.9	59.1
Totals	2.7	8.0	65.1	62.2	37.8

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Self catering accommodation occupancy for 2007						
2007	Average Party	Average Stay	Net Unit Occ	% UK	% OS	
January	2.6	15.2	50.1	78.7	21.3	
February	2.4	15.4	67.5	96.6	3.4	
March	2.9	10.0	47.1	81.4	18.6	
April	3.0	7.2	70.1	57.0	43.0	
May	2.9	7.7	68.3	64.2	35.8	
June	3.0	7.1	66.4	62.7	37.3	
July	3.3	9.0	60.3	52.8	47.2	
August	3.4	8.3	75.9	62.6	37.4	
September	2.6	7.8	64.9	73.8	26.2	
October	2.5	7.0	65.4	61.8	38.2	
November	2.4	7.6	60.9	63.1	36.9	
December	2.3	9.0	47.8	58.9	41.1	
	2.8	9.3	62.1	67.8	32.2	

Carrier News

Port of Dover Figures

DECEMBER	2008	2007	% CHANGE
Passengers	584,979	525,756	+11%
Car	114,466	101,199	+13%
Coaches	4,375	3,979	+10%

The Port of Dover continued to benefit from the increase in traffic due to more European visitors, as well as the closure of one of the tunnels at Eurotunnel. There were increases across the board in passengers, cars and coaches.

Port of Dover annual figures for 2008

Comparing 2007 with 2008, Port of Dover has had a varied year, but overall passengers and coaches are down compared to 2007.

- Passengers down 3% compared to 2007
- Cars - no change
- Coaches down 7% compared to 2007

Eurotunnel Figures

Eurotunnel still had one of its tunnels out of action in December after the fire in September, and so this was still impacting upon the number of crossings in December. Traffic in December was 42% down on 2007, but the tunnel is now fully opened (Feb 2009), and so normal levels of business should be resumed shortly. In spite of the difficulties faced last year with the loss of one tunnel, Eurostar carried a record 9.1 million passengers in 2009.

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Tourist Information Centres

Visitor Numbers

TICs	% change 2007-8
Coastal	Down 13%
Urban	Down 13%
Rural	Insufficient sample
Kent overall	Down 13%

Telephone Enquiries

TICs	% change 2007-8
Coastal	Down 1%
Urban	Up 8%
Rural	Insufficient sample
Kent	Up 5%

Postal and Email Enquiries to

TICs	% change 2007-8
Coastal	Down 1%
Urban	Up 32%
Rural	Insufficient sample
Kent	Up 11%

Figures for individual TIC's December 07/08

Name	Footfall December 2008	Footfall December 2007	Phone calls Dec 2008	Phone calls for Dec 2007	Postal/email enquiries Dec 2008	Postal/email enquiries Dec 2007
Ashford	536	678	255	191	179	155
Broadstairs	26	168	0	19	0	4
Canterbury	No figs	No figs	No figs	No figs	No figs	No figs
Deal	723	691	93	82	297	378
Dover	2828	2897	299	323	425	379
Faversham	1126	711	No figs	No figs	No figs	No figs
Gravesend	No figs	No figs	No figs	No figs	No figs	No figs
Maidstone	5060	5048	273	237	1	0
Margate	1067	1717	74	95	19	2
Medway	23747	27867	837	798	274	205
Ramsgate	829	1418	20	29	2	1
Tunbridge Wells	3519	4097	302	322	174	116
Sandwich	Closed in Dec	Closed	Closed	Closed	Closed	Closed
Sevenoaks	No figs	No figs	No figs	No figs	No figs	No figs
Shepway	0	0	349	298	60	45
Tonbridge	No figs	No figs	No figs	No figs	No figs	No figs

Nationality of TIC visitors

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December 2008	% Domestic Visitors	% Long Haul Visitors	% European Visitors
Ashford	90%	2%	8%
Broadstairs	100%	0	0
Canterbury	No figs	No figs	No figs
Deal	90%	2%	8%
Dover	65%	14%	21%
Faversham	97%	1%	2%
Folkestone	80%	5%	15%
Gravesend	No figs	No figs	No figs
Herne Bay	No figs	No figs	No figs
Maidstone	50%	37%	13%
Margate	99%	0%	1%
Medway VIC	70%	5%	25%
Ramsgate	99%	0%	1%
Royal Tunbridge Wells	85%	5%	10%
Sevenoaks	No figs	No figs	No figs
Tonbridge & Malling	No figs	No figs	No figs
Whitstable	No figs	No figs	No figs

Tourist Information Centre summary for June to December

For many TICs, 2008 meant a drop in footfall, and in some cases closure. The table below shows the year on year comparisons for the TICs who were able to submit sufficient data for a comparison to be made. Overall for Kent, TIC footfall for June to Dec was down 12%.

Ashford	-3%	Gravesend	-6%	T Wells	7%
Broadstairs	-7%	Herne Bay	21%	Sandwich	16%
Canterbury	-29%	Maidstone	-14%	Whitstable	-17%
Deal	-9%	Margate	-11%		
Dover	2%	Medway	-12%		
Faversham	14%	Ramsgate	-1%		

Performance according to location

TICs	% change 2007-8
Coastal	Up 1%
Urban	Down 19%
Rural	Up 12%
Kent overall	Down 12%

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Other News

Research in 2008 by VisitBritain and Visit London into the impact of the credit crunch on tourism indicates that 20% of those who took a foreign holiday last year plan to save money by choosing the UK instead in 2009. (Source TravelMole, 11.2.09)

Business to Business Website – www.visitkentbusiness.co.uk

Have you had a look at our new B2B website yet? It was designed for you. All of our research and plans are posted onto the site for your use so please give us your feedback on how useful you find the site and what you would like to see. Contact Nina Dietrich on 01227 862787 or nina.dietrich@visitkent.co.uk

All copies past and present of the Business Barometer are posted on to the website, under research and development, Business Barometer

The screenshot shows the Visit Kent Business website. The header includes the 'visit Kent Business' logo, a search bar, and a navigation menu with links for Home, About us, Marketing, Media Centre, Research & Development, Training & Support, and Join us. The main content area features a large image of a meeting room. Below the image is a sidebar with a list of links: Business Barometer, Economic Impact Model, Other Research, Tourism Research Contacts, Tourism Development Strategy, London 2012 Olympics, District Dashboards, Tourism Signs, Planner's Guide, Hotel Development, Transport, Green Tourism, and Contact Details. The main text area is titled 'Research & Development' and contains three paragraphs of text. The footer includes links for Contact us, Terms & Conditions, Privacy Policy, Accessibility Statement, Site map, Image Library, and the website URL www.visitkent.co.uk.

Thank you for your valued contributions during 2008. We look forward to an informed and successful 2009. For any comments regarding the Business Barometer, please contact Tracey Parker on 01227 862792 or tracey.parker@visitkent.co.uk

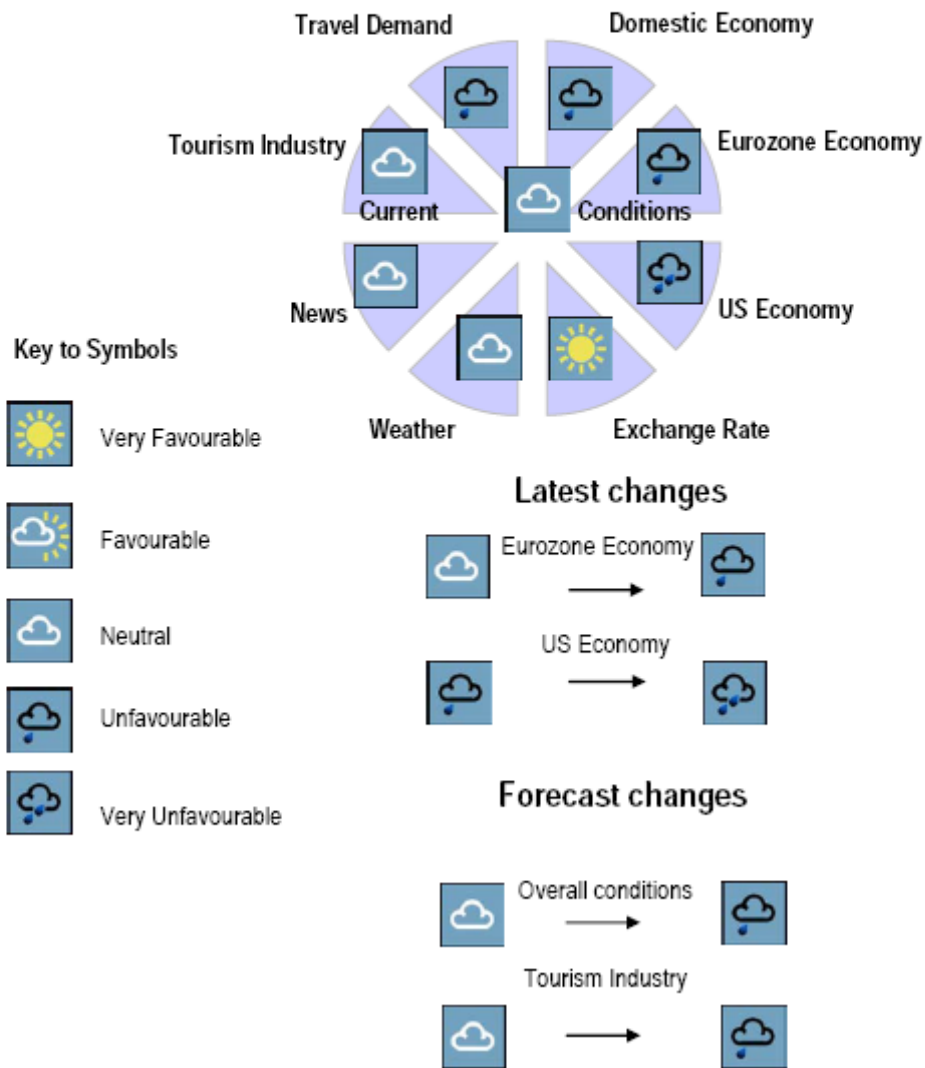
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Factors contributing to tourism trends in Britain, December 2008



Source Visit Britain Insights 12th December 2008.

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