Kent's
Business Barometer
July to September 2007

Welcome to our second issue of the new Business Barometer, and thank you to those who gave us feedback on our last issue. This issue covers July to September 2007 and has been compiled using data supplied to Tourism South East by tourism businesses in Kent. Welcome to our new contributors, and thank you to those who continue to loyally send in the data month on month, we appreciate your efforts. The cycle for the information to be input, collated, analysed and published is still longer than we would like, but it is important that we display as full a picture as possible in each issue, so apologies for any delays in its production. More contributors still would be welcome as a larger sample helps us to give you a more accurate picture

Kent Headlines July – September 2007

Kent Attraction Visitor Numbers Up 20.9%
Kent Accommodation Occupancy UNCHANGED
TIC Visitor Numbers DOWN 2%
Kent Cross Channel Carriers UP 3.47%

Attractions

Kent Data on attractions

There has been great success in getting new attractions on board to feed data into the Business Barometer, with Maidstone, Medway, and Swale all adding 3 new attractions each since July 2007. Gravesham was not far behind with 2 new attractions signed up, and Ashford, Shepway, Tonbridge and Tunbridge Wells with 1 each, but Thanet are to be particularly congratulated as their contributing attractions sample is the largest in Kent. If you are an attraction in any District considering taking part please do discuss it with your Tourism Officer at the local government office, or with Janet Biles at Tourism South East on jbiles@tourismse.com, Telephone number 02380 625400.

Data was provided from a **constant** sample of attractions with a good geographical spread across Kent, and attraction type. During the quarter from July to September 2007, there would seem to have been an amazing increase of 20.9% in visitor numbers, and as the sample is constant, it would appear to be due in part to the highly successful Tour de France stimulating the figures in July, and possibly a delayed season due to the poor early summer weather. A number of attractions within the sample have in 2007 experimented with annual tickets, or Gift Aid, and this has had a positive impact on their visitor figures. Cruise liner port of call visits to Dover have increased in 2007 and accommodation providers are noticing crujse passengers are staying longer prior to boarding which may also be impacting upon local visitor attractions and their visitor numbers.

The attractions with indoor activities seem to have benefited more than the outdoor attractions due to the weather. The monthly data for visitors to Kent Attractions is:

July	**Up 13.8%**
August	**Up 27.6%**
September	**Up 21.3%**

Rural attractions were up by 33% and seemed untouched by the poor weather in July, as were urban attractions at 35% up. The majority of attractions on the route of the Tour de France were either rural or urban and so may have benefited most from the spin off from the event. However Coastal attractions were down 3.3% during the period from July to September. Different types of attraction also seem to have fared very differently as can be seen below:

Visitor Numbers to attractions Jul to Sept 2007 analysed by attraction type

Historic Properties	**Up 27.4%**
Museums	**Up 42.4%**
Gardens	**Up 3.3%**
Zoos	**No figures**
Other	**Up 1.4%**

Regional Data on attractions

According to Tourism South East, South East Visitor numbers were up 1% overall in the quarter, no change in July, up 1% in August, and up 2% in September

National Data on attractions

Nationally, visitor numbers were less positive in this quarter than the previous two quarters of 2007, increasing by just 1% nationally compared with 13% in Quarter 1 and 5% in Quarter 2. Nationally the figures across the quarter were as follows:

- Historic Houses/Castles Up 3%
- Other historic properties Up 3%
- Museums/art galleries Down 1%
- Gardens Up 3%
- Visitor heritage Centres Down 3%
- Wildlife attractions/zoos Up 1%
- Other attractions No change

- Free attractions – No change
- Paid attractions – Up 1%
- Coastal Attractions - Down1%
- Rural Attractions Up 3%
- Urban Attractions - No change

Tourist Information Centres

The collection of TIC data ran more smoothly this quarter, and hopefully those TIC's who had experienced problems have now had them resolved. There would seem to have been some problems in the data transferring from Destination Centre to EnglandTIC, so it will continue to be important for TIC's to check their data each month. Please let Tracey Parker, the Research Coordinator know if you are still experiencing problems with loading visitor figures.

Tourist Information Centres again had a mixed quarter with Inland TIC's experiencing a 1.3% growth in visitor numbers in the quarter, compared to a 3.73 reduction for Coastal TIC's. As this quarter was the main one affected by the higher than average rainfall, it may be due to visitors preferring the more protected inland and undercover attractions, and therefore visiting urban and rural rather than coastal TIC's.

Year on Year comparison of visitor numbers at Kent TIC's
July to September 2006/2007

Month	% Increase/Decrease
July	+7.08
August	+1.06
September	-5.55

In Kent there were 6 TIC's that had experienced an increase in visitor numbers over the quarter, and 8 that experienced a decline. Overall this quarter, visitor numbers to TIC's were down nearly 2%.

Accommodation

Accommodation providers are needed across the county to submit data to ensure that the picture is accurately presented. If you think you can help with this data collection, please can you contact Janet Biles at Tourism South East on jbiles@tourismse.com, Telephone number 02380 625400.

Kent Data

Room occupancy stayed constant between 2006 and 2007 for this quarter, at around 65%. As you can see from the table below of serviced accommodation, some Districts have insufficient sample sizes to enable accurate analysis to take place. Other Districts are achieving variable results partially because of a variable sample size.

Serviced Accommodation Providers occupancy levels

District Serviced Accommodation	Average % Room Occupancy Jul – Sept 2006	Average % Room Occupancy Jul – Sept 2007	% change for month of July	% change for month of Aug	% change for month of Sep
Ashford (insufficient sample size)					
Canterbury	70.8	69.9	-5.23	-4.58	7.21
Dartford (insufficient sample size)					
Dover	75.7	80.5	6.02	-0.39	8.74
Maidstone (insufficient sample size)					
Medway (insufficient sample size)					
Sevenoaks	67.8	43.4	-25.48	-18.92	-28.25
Shepway	52.4	59.8	8.64	5.5	8.10
Swale	60.7	55.0	-16.82	8.84	17.08
Thanet	72.9	63.9	-5.14	-7.07	-14.73
Tonbridge and Malling (insufficient sample size)					
Tunbridge Wells	54.0	82.69	31.42	31.09	23.62
Occupancy – Kent overall	**64.9**	**65.0**	**-0.94**	**2.07**	**3.11**

These results compare favourably with the occupancy data from the previous 6 months of each year, which were 50% for Jan – Jun 2006 and 51% for Jan – Jun 2007.

Self Catering Accommodation Data

To enable analysis to take place, we need consistent provision of information so that any month by month, or year by year changes can be monitored. Unfortunately the sample of data submitted by contributors to the Self Catering Accommodation database ‘fell away’ for July to September 06 and so was insufficient for analysis, but the figures for the quarter July to September 07 are as follows.

	Average Stay	Net unit occupancy	% UK residents	% Overseas residents	Average Party Size
July 07	9.0	58.9	55.8	44.2	3.3
August 07	8.4	74.6	64.4	35.6	3.3
Sept 07	7.4	62.3	69.4	30.6	2.4
Average	**8.3**	**65.3**	**63.2**	**36.8**	**3.0**

National Data on Accommodation (Source Visit Britain)

July

UK bedspace occupancy in July 2007 was 59%, 1 percentage point higher than in July 2006. Room occupancy was 70%, 1 percentage point lower than in July 2006.

City/large town locations recorded rises in occupancy levels when compared with July 2006. Bedspace occupancy in small town locations also rose while room occupancy fell. Seaside and country/village locations saw a fall in both room and bedspace occupancy

August

UK bedspace occupancy in August 2007 was 65%, 4 percentage points higher than in August 2006. Room occupancy was 74%, 2 percentage points higher than in August 2006.

City/large town locations recorded rises (of 10 percentage points for bedspace occupancy and 4 for room occupancy) in occupancy levels when compared with August 2006. Bedspace occupancy in small town locations also rose while room occupancy fell. In seaside locations bedspace occupancy fell while room occupancy rose and in country/village locations both measures of occupancy fell.

September

UK bedspace occupancy in September 2007 was 56%, 1 percentage point lower than in September 2006. Room occupancy was 71%, 2 percentage points lower than in September 2006.

When compared with September 2006, bedspace occupancy in hotels and guest houses rose slightly while room occupancy remained unchanged in guest houses but fell in hotels. Bed and breakfast establishments saw a 3 percentage point fall in both measures of occupancy

Seaside, small town and country/village locations all recorded falls in occupancy levels when compared with September 2006. In city/large town locations bedspace occupancy rose slightly but room occupancy fell

Operator News

Both Eurotunnel and Port of Dover had another excellent quarter with increased passenger traffic across all three months.

Cross Channel Passenger Numbers % increase 2006-7

July	August	September
2.21%	4.2%	4.0%

Both carriers must be congratulated as they have had a continuous rise in business across all of the first nine months of 2007. This may be due in part to cheap flights being less appealing for short haul destinations due to queues at check-in and confusion on security practice at airports. One reason for the Port of Dover's continuing success was put down to the growth in use of both cruise terminals.

Business Confidence

A Tourism South East regional update on business confidence will be available in the next issue for the 6 months July – December 2007. Nationally, for the quarter July – Sept, the picture is as follows:

- Business Performance

Although business performance overall remained positive in July to September with attractions more likely to be claiming better performance than worse performance compared with the equivalent period of 2006, attractions were less likely to report positive performance compared with earlier quarters of 2007.

- Business Confidence

There have been indications in July to September of business confidence becoming more fragile, with fewer attractions feeling optimistic about their prospects for the next quarter compared with earlier in 2007. Nevertheless, there remain a greater proportion of attractions (36%) who feel more optimistic about prospects for the future than they did in 2006.

UK News from Visit Britain

Following an exceptionally wet May and June, July 2007 continued to deliver rainfall significantly above average (double the average across England as a whole). Late July 2007 was also characterised by severe flooding across southern England. This contrasts with the exceptionally warm, dry and sunny conditions recorded in July 2006. August and September tended to be more typical overall in terms of rainfall and sunshine levels, although August was the coldest across England since 1993.

Domestic Economic News

The Department for Culture, Media and Sport is to provide £45 million of funding between 2008 & 2011 to help culture and the arts regenerate some of England's most run down seaside resorts. The investment is to be targeted at disadvantaged coastal resorts around England and is intended to stimulate wider improvements and economic benefits in the destinations. (Source DPUK, winter 2007)

Please feedback to Tracey Parker, Research Coordinator at Visit Kent, tracey@ktanet.co.uk (01227) 862792 if you have any suggested improvements for the style or content of the Barometer.

Kent County Council

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