



## Kent's Business Barometer October to December 2007

Since our last edition of the Business Barometer, Kent Tourism and the Kent Tourism Alliance have come together under the new brand of **Visit Kent**. The new organisation was launched at the Kent 2020 Vision conference on 3<sup>rd</sup> April at the Kent County Showground.

The new Cambridge Economic Impact Model has also been released which shows the value of our tourism industry to Kent. **Tourism expenditure is worth £2.1 billion to Kent** according to the Cambridge Model 2006, a 13.5% increase from 2003. The overall **Economic Impact is £2.5 billion** taking into account the multiplier effect. If you would like to explore these figures in detail the full report is on our website [www.ktanet.co.uk](http://www.ktanet.co.uk) under the research section and any questions should be addressed to Tracey Parker on [tracey.parker@visitkent.co.uk](mailto:tracey.parker@visitkent.co.uk).

### Kent Headlines Oct - Dec 2007

**Kent Attraction Visitor Numbers 9.6% UP**  
**Kent Accommodation Occupancy 5% DOWN**  
**TIC Visitor Numbers 8% UP**  
**Kent Carriers 1.7% UP**

### Attractions

#### Kent Data on attractions

Three good months for tourism attractions in Kent as the following table shows:

Change in Visitor numbers Oct 06/07	Change in Visitor numbers Nov 06/07	Change in Visitor numbers Dec 06/07

<b>3.8% UP</b>	<b>6.72% UP</b>	<b>18.43% UP</b>
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The historic properties and museums in Kent seem to have been particularly successful during this period, but it must be remembered that the sample is small and so not totally representative of the sector. This small sample may have resulted in an overly distorted increase in visitor numbers to these attractions, however this can be remedied by more attractions coming on board and supplying data. As can be seen from the national data from Visit Britain in the next section, this positive quarter for historic properties is part of a national trend. The weather may have influenced these figures due to the climate being relatively dry and sunny with temperatures above 'the norm' for that time of year.

### **Visitor Numbers to attractions Oct to Dec 2007 analysed by attraction type**

	<b>October</b>	<b>November</b>	<b>December</b>
<b>Historic Properties</b>	<b>Up 20%</b>	<b>Up 31.5%</b>	<b>Up 106%</b>
<b>Museums</b>	<b>Down 32%</b>	<b>Up 1.3%</b>	<b>Down 75%</b>
<b>Gardens</b>	<b>Up 4%</b>	<b>Down 5.1%</b>	<b>Down 2%</b>
<b>Zoos</b>	<b>No figures</b>	<b>No figures</b>	<b>No figures</b>
<b>Other</b>	<b>No change</b>	<b>Up 1%</b>	<b>Down 3.5%</b>

### **National Data on attractions (Source Visit Britain)**

According to Visit Britain, the results from Oct to Dec 2007 were more positive than those of the previous quarter of 2007, with visitor numbers increasing by 4% compared with only 1% in July to Sept 2007. This improvement was driven by a strong growth in visitor admissions during October. However, growth remained at lower rates than observed during the first half of the year

Historic houses/castles and gardens performed particularly well in October, benefiting from the dry weather reported.

Nationally the figures across the quarter, analysing according to attraction type were as follows:

<b>Attraction Category</b>	<b>Total Qtr 4 change %</b>	<b>October Change %</b>	<b>November Change %</b>	<b>December Change %</b>
<b>Total England</b>	<b>4</b>	<b>6</b>	<b>2</b>	<b>1</b>
<b>Historic Houses/Castles</b>	<b>10</b>	<b>11</b>	<b>5</b>	<b>14</b>
<b>Other Historic Properties</b>	<b>2</b>	<b>0</b>	<b>5</b>	<b>5</b>
<b>Museums/Art galleries</b>	<b>4</b>	<b>3</b>	<b>5</b>	<b>3</b>
<b>Gardens</b>	<b>12</b>	<b>21</b>	<b>4</b>	<b>-8</b>
<b>Visitor/heritage centres</b>	<b>-1</b>	<b>-5</b>	<b>2</b>	<b>3</b>
<b>Wildlife attractions/Zoos</b>	<b>-2</b>	<b>-1</b>	<b>-2</b>	<b>-5</b>
<b>Others</b>	<b>-1</b>	<b>3</b>	<b>-4</b>	<b>-6</b>

## Accommodation

### Kent Serviced Accommodation Data

Districts where the number of providers submitting information was too small to analyse are not included in this table. The Districts with sufficient sample size, and their results, are detailed below.

District Serviced Accommodation	% Room Occupancy Oct - Dec 2006	% Room Occupancy Oct - Dec 2007	% change for month of Oct	% change for month of Nov	% change for month of Dec
<b>Canterbury</b>	<b>56.50</b>	<b>51.14</b>	Up 1.2%	Down 7.8%	Down 9.5%
<b>Dover</b>	<b>52.98</b>	<b>50.91</b>	Down 2.1%	Down 0.5%	Down 3.6%
<b>Shepway</b>	<b>34.11</b>	<b>39.87</b>	Up 3.3%	Up 2.6	Up 11.3
<b>Swale</b>	<b>45.87</b>	<b>39.03</b>	Down 16.5%	Up 1.5	Down 5.5
<b>Thanet</b>	<b>57.90</b>	<b>40.17</b>	Down 26.4%	Down 16.5	Down 10.3
<b>Tunbridge Wells</b>	<b>59.72</b>	<b>39.80</b>	Down 24.8	Down 32.0	Down 2.9
<b>Occupancy – Kent quarterly average overall</b>	<b>49.45</b>	<b>44.80</b>			

### Kent Self Catering Data

Last quarter we were unfortunately not able to make comparisons year on year due to insufficient data. However, this quarter sufficient data has been received to enable comparisons, and we would like to thank the efforts of Districts and the self catering accommodation providers themselves for providing this information and for their efforts in this area.

### **Self-Catering Occupancy Comparison Data Oct- Dec 2006/7**

	Average Stay	Net unit occupancy	% change of occupancy levels	Average Party size	% UK residents	% Overseas residents
<b>Oct 06</b>	6.7	65.9		2.5	62.1	37.9
<b>Nov 06</b>	9.3	47.4		2.0	54.3	45.7
<b>Dec 06</b>	10.2	50.0		2.4	67.6	32.4
<b>Average</b>	<b>8.7</b>	<b>54.4</b>		<b>2.3</b>	<b>61.3</b>	<b>38.7</b>
<b>Oct 07</b>	7.0	65.4	1% Down	2.5	61.8	38.2
<b>Nov 07</b>	7.6	60.9	28% Up	2.4	63.1	36.9
<b>Dec 07</b>	9.0	47.8	4.4% Down	2.3	58.9	41.1
<b>Average</b>	<b>7.9</b>	<b>58.0</b>		<b>2.4</b>	<b>61.2</b>	<b>38.8</b>
<b>% change</b>	<b>9%</b>	<b>7%</b>		<b>4% Up</b>	<b>No</b>	<b>No</b>

in quarters 06/07	down	Up			change	change
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## National Data - United Kingdom Occupancy Survey – Source Visit Britain

**October 2007:** UK bedspace occupancy in October 2007 was 50%, 2 percentage points higher than in October 2006. Room occupancy was 67%, also 2 percentage points higher than in October 2006

When compared with October 2006, occupancy levels in hotels rose while those in bed and breakfast establishments fell. In guest houses, bedspace occupancy rose slightly while room occupancy fell by a similar small amount (see Table 3).

Occupancy levels in city/large town locations rose when compared with October 2006 but fell in seaside and country/village locations. Small town locations recorded a slight rise in bedspace occupancy but a small fall in room occupancy.

### **November 2007**

UK bedspace occupancy in November 2007 was 43%, 2 percentage points higher than in November 2006. Room occupancy was 59%, the same as in November 2006.

When compared with November 2006, occupancy levels in hotels and guest houses rose (by up to 3 percentage points) while those in bed and breakfast establishments fell (by 1 percentage point for bedspace occupancy and by 2 for room occupancy)

Occupancy levels in city/large town locations rose when compared with November 2006 but fell in all other locations (seaside, small towns and country/village locations)

### **December 2007**

UK bedspace occupancy in December 2007 was 38%, 3 percentage points lower than in December 2006. At 49%, room occupancy was also lower (by 4 percentage points) than in December 2006.

When compared with December 2006, occupancy levels in all types of serviced accommodation fell, with the greatest falls being seen in bed and breakfast establishments where falls of 7 percentage points for bedspace occupancy and 13 percentage points for room occupancy were recorded.

Occupancy levels in seaside, city/large town and country/village locations fell when compared with December 2006. In small town locations, bedspace occupancy was as in the previous year but room occupancy fell slightly

## Carrier News

### Kent

The final quarter of the year was positive for the carriers with a strong October showing 5% growth, a slight drop in November down 1%, and then a 1% rise again in December

Carriers felt that the coach market in October to December 2007 compared to the previous year (2006) was:

<b>October</b>	<b>November</b>	<b>December</b>
Same	Down	Down

## **Tourist Information Centres**

Kent TIC's experienced an overall increase in visitor numbers with an 8% average across the quarter, however most TIC's had a particularly bad month in October. Broadstairs, Herne Bay and Margate suffered low visitor numbers this quarter overall compared to 2006, but Dover Deal and Whitstable had a good quarter. Results improved in December for most, but this may be due to a late improvement in weather, with mid December showing 'a dry spell of weather with little if any rain and often quite sunny skies by day' (Source www.bbc.co.uk)

### **Comparison of visitor numbers at Kent TIC's Oct – Dec 2006/7**

<b>Month</b>	<b>% Increase/Decrease</b>
<b>October</b>	14% Decrease
<b>November</b>	23% Increase
<b>December</b>	25% increase

## **Business Confidence**

Visit Britain commented that the major and rapidly growing negative influence on business confidence is fear about the general economic climate (interest rates, fuel prices, credit squeeze etc.). The proportion highlighting this as a reason for lack of optimism has increased rapidly over the past two quarters. The two regions with lowest business confidence were again the South East and South West, as they have been in previous quarters of the year.

Across the year, quarterly growth rates were:

- 13% Quarter 1 (January to March);
- 5% Quarter 2 (April to June);
- 1% Quarter 3 (July to September);
- 4% Quarter 4 (October to December).

This is the last 2007 Business Barometer and the last in Quarterly format. A new system is being introduced for 2008 data which will provide monthly reports, and this data will be collated direct from the Kent Industry by Visit Kent. We will be contacting tourism businesses shortly in this respect to set up the sample. If you would like to be part of this confidential sample, please contact Tracey Parker on the number below.

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