

Kent Tourism Business Barometer

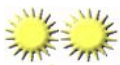
September 2004



A total of **40** businesses took part in the September survey with a good spread around the county. Thank you for your participation!

Should you have any queries regarding the Kent Tourism Business Barometer please contact Farah Miri-Meziane on 01622 221915 or email farah.mirimeziane@kent.gov.uk

September Summary



The best finale of the season!

What a great performance to finish the season! September 2004 Business Barometer survey results revealed that Kent's tourism sector has increased overall by **5.8%** when compared with the same month last year. The pleasant weather at the start of the month and some special events have helped increase the number of visitors to Kent.

The best performance for this month was from the Self-catering sector with an increase of **45.2%** (as the individual sample size for Self-catering is relatively small, the result should be treated with caution). This performance was followed by the TIC sector with an increase of **6.7%**. The best result was from Broadstairs TIC with a jump in footfall and mail enquiry to **44.2%** and **64.4%** respectively. Hotel accommodation sector also saw an increase of **4.9%** in their room occupancy level attributed to the increase demand from university students and special exhibitions and weddings scheduled in September.

The other sectors experienced a decline in their performance. The worse fall in business was from the Caravan and Camping sector with a decrease of **13.8%**.

Visitor attractions sector decreased by **4.5%** due to a drop in educational visits and change in timing of special events.

Cross Channel Carriers sector went down by **3.1%** due to continued fierce competition from budget airlines and general market decline experienced throughout the season

Expectations for next month

11.5% 

61.5% 

27% 

Each month, participants are asked to voice their expectations for the forthcoming month. 26 participants expressed their views. Kent businesses anticipated that the tourism industry would see a good increase in visitors with the half term scheduled for October.

Most of the hotel accommodation providers reported good advanced bookings of 37% and expect October to be a busy month. The self-catering sector is also expecting very good business for next month. TICs are optimistic and looking forward to an increase in enquiries due to special events and early Christmas shopping. Attractions are optimistic and expect good visitor numbers. For the coming month, Cross

Channel Carriers are expecting a decline in their passenger numbers due the market decline. 27% are not so optimistic about their performance in October due to the bad weather and cut down in some of their services.

Sector	September 2004 vs September 2003	% Overseas visitors (July 2004)	September 2003 vs September 2002	% Overseas Visitors (July 2003)
Cross Channel Carriers (Passengers)	↓3.1%	20.5%	↓9.5%	21%
Attractions	↓4.5%	24.3%	↓1.5%	23%
TICs	↑6.7%	15%	↑11%	16%
Hotels & Guest Acc	↑4.5%	13%	↑3%	22.5%
Camping & Caravan	↓13.8%	2.1%	↑32%	8%
Self-catering	↑45.2%	45%	↓47%	35%

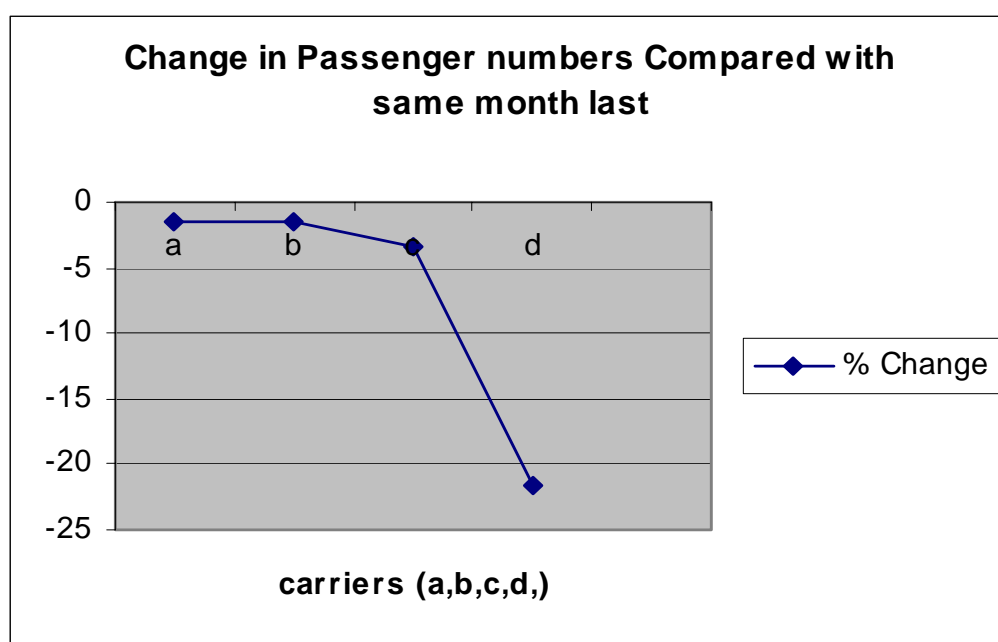
Results

Cross Channel Carriers (n=4)

- **Passenger number ↓ 3.1%**

During September, most of the carriers experienced a decrease in passenger numbers. The largest decrease being **21.6%** attributed to competition from low cost airlines opened in Manston International Airport and the general market decline.

- **Overseas visitor numbers: 17.5%**, predominantly from France and Germany



Attractions (n=10)

- **Visitor numbers: ↓ 4.5%**

Largest increase: **5%** resulted from better marketing activities, increase in the numbers of group business for this month. Other increases were due to school visits and special events.

Largest decrease: **29.7%** attributed to bad weather and drop in educational visits

- **Overseas visitors: 24.3%**

Equally from France, Germany and Holland.

TICs (n=12)

- **Footfall: ↑6.7%**

	Increase		Decrease
Broadstairs	44.2%	Whitstable	22%
Canterbury	30%	Ramsgate	20.5%
Dover	18.8%	Herne Bay	19.9%
Maidstone	4.2%	Ashford	16.3%
Gravesend	0.4%	Medway	10.6%
Tunbridge Wells	0.3%	Margate	10%

Broadstairs TIC experienced a large increase in footfall, this good performance was followed by Canterbury TIC, both centres reported that this was attributed to increased popularity of the centres.

Other reasons for the increase in visitor numbers given by the rest of the TICs were recruitment fairs organised in the centres and the closure of the bus Station in Dover which increased the local usage of the office.

Whitstable TIC experienced the worse performance of the month, a decrease in footfall during September of **22%** due to security reasons.

For the other TICs, reasons for the decreases were attributed to bad weather.

- **Overseas visitors: 15%**

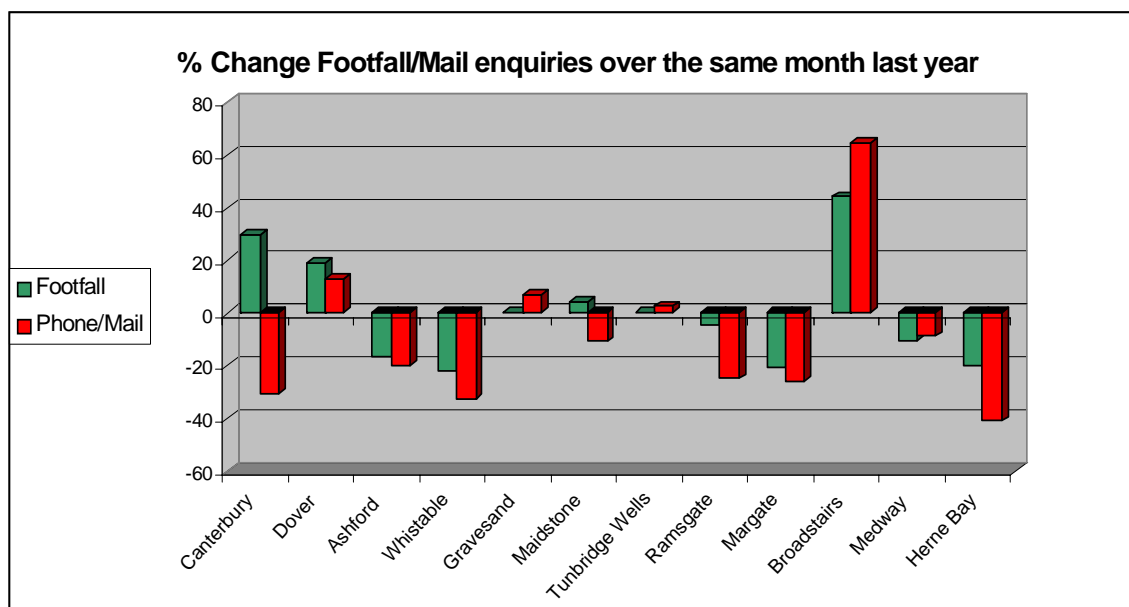
Predominantly from Germany, then France. Other countries mentioned were Japan, Holland, Australia and Spain.

Canterbury and Dover scored the highest number of overseas visitors at **50% and 43%** respectively followed by Tunbridge Wells TICs with **40%**. The lowest was reported from Herne Bay with **1%**.

- **Phone and Mail enquiries: ↓ 13%**

Largest increase: **64%** (Broadstairs) due to more publicity of the centre.

Largest decrease: **41%** (Herne Bay) due to increase use of the Internet.



Hotels and Guest Accommodation (n=6)

With the inclusion of Tourism South East's Occupancy Survey to bolster the survey (n=16)

- **Occupancy level ↑5%**

Largest increase: **32.4%** due to increase demand by university students and east Europeans visitors, large residential conference and wedding receptions.

Largest decrease: **5%** Reasons not given.

- **Overseas visitors: 5.8%**

Predominantly from France and USA. Saudi Arabia and Kuwait were also mentioned.

- **Business bookings: 9.7%**
- **Forward bookings: 37%** are booked for the forthcoming months
- **The Tourism South East Occupancy Survey: 71.8%**, ranging between **73%** and **13%**. Adding all responses together, the average Kent Occupancy rate for September was **69.4%** (n=22).

Caravan & Camping (n=4)

Due to the small sample size, this should be taken with cautions

- **Pitch occupancy: ↓13.8%**

The decrease in the pitch occupancy level was mainly due to the bad weather.

- **Guest numbers: up by 4.6%** attributed to more popularity to one particular establishment.
- **Overseas visitors: 2.1%** mainly from Germany and Holland

Self Catering Accommodation (n=5)

Due to the small sample size, an additional monthly telephone survey was undertaken with key Self Catering Agencies (n=3)

- **Occupancy level: ↑45.2%**

Two establishments reported an increase of **31%** and **25%** respectively due to better advertising.

Overseas visitors: 45% Predominantly from Holland

- **Business bookings:** Only one establishment reported that 9.4% of the customers were businesses related
- **Forward bookings:** two establishments cited that bookings were the same as last year and two was down.

September news

Kent Tourism

- September report is the last survey of the season. Thank you all for your participation. The end of season report will be published by the end of November.
- Kent Tourism is holding a tourism conference on the 24th November 2004 at the Canterbury Cathedral International Study Centre. The conference will be used for launching the Kent Tourism Academy and it will be an opportunity for networking within the tourism industry in Kent.

Transport:

- Dover Cruise is expecting a record year with 160,000 passengers embarking or disembarking from cruise, or coming ashore for an excursion.
- New ferries make waves in Ramsgate. TransEuropa is now offering the only direct passenger service between Ostend in Belgium and the English Channel Port.

Events:

- Many exciting events happened this month including the Walking Festival, the Hop Picking Festival and the Beer and Hop Festival.