Visit Kent's Business Barometer November 2010

For many the month started well, with relatively mild weather and the beginnings of the Christmas shopping and event rush. Attractions noticed increased purchases in gift shops to beat the VAT increase. However, the heavy snow and subsequent travel issues at the end of the month resulted in cancellations and stranded residents and visitors for accommodation and conference venues.

Comparison November 2009/2010	
Attraction visitor numbers	**Up 6%**
TIC Footfall	**Down 24%**
Cross Channel Passengers	**Down 6%**
Business Tourism	**Up 9%**
Serviced Accommodation which includes the smaller B&B and guest houses. **Source: www.ribos.co.uk/kent**	**Down 8%**
Serviced Accommodation **Larger Hotel Accommodation Occupancy for November** **Source 2010 STR Global Ltd**	**Down 2%**

Other news

- Attractions that had new special events earlier in the month or had developed their product had good November results in spite of the weather and were 21% up.
- Accommodation providers and Conference venues were particularly hit by the cancellation of public sector events. However, business tourism had such a poor year in 2009, that 2010 in comparison was still more positive.
- Heavy, early snow at the end of the month meant that Kent transport routes and carriers suffered, causing travel delays and cancellations.
- TIC footfall fell away in November although emails and phone calls were up.
- Cross channel carrier passengers, cars and coaches were all down compared to November 2009
- Both consumer and B2B websites were up on November 2009

Attractions

Kent visitor numbers in November

Visitor numbers	2010	2009	% change
	128,820	122,024	Up 6%

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%

Range of performance amongst attractions overall

9 attractions were up ranging from 2% up, to 81% up. 8 attractions were down ranging from 44% down to 1% down. 2 attractions stayed the same.

Performance according to cost % change November 09/10

Charging	Free
Up 6%	Up 7%

Performance according to location, % change November 09/10

Coastal	Rural	Urban
Down 20%*	Up 21%	Up 5%

*small sample for coastal attractions

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

Historic Building Heritage Attraction	Other
Up 1%	Up 38%

Many attractions are closed this time of year, and so attraction groups that were too small were merged together with the 'other' section.

Performance according to size, % change November 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 10%	Up 11%	Up 6%	Sample too small	Up 3%

Factors affecting visitor attraction results

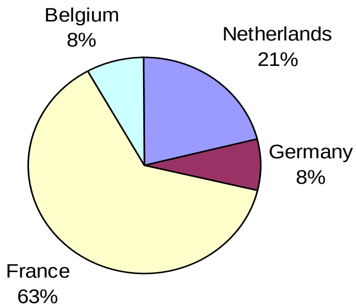
Positive factors
New events in November
Increase in number of people wanting to support & buy local.
up 2% so pretty stable
Open seven days a week in November 2010 whereas only weekends in November 2009.
Strong groups market
Overseas market still strong
Xmas sales boosted by prospect of bad pre Xmas weather + buying early to beat NY vat increase.
New marketing strategy
Higher corporate business and tours

Negative factors
Bad weather
Quieter generally
Bad road works
Economic uncertainty before Christmas people saving/spending for Christmas
Recession & extreme weather conditions

Overseas visitors to attractions in November

Estimates were that around 83% of visitors were domestic, 4% long haul, and 13% of European origin.

Top countries of origin of overseas visitors in November



Cross Channel Carriers

These figures are the combined totals for the Port of Dover and Eurotunnel and show November 2010 was a more difficult month for both ferries and Eurotunnel with falls in passenger and car crossings due in part to the snowy conditions. No other factors affecting results were reported by the cross channel carriers.

Cross channel crossings

November	2009	2010	% CHANGE
Passengers	790,294	743,836	-6%
Cars	203,878	192,711	-6%
Coaches	5,653	5,474	-3%

Tourist Information Centres (TICs)

Snow reduced the number of visitors to the TICs. Please note that TICs can only be compared with their own performance from the previous year, and not compared with other TICs as all are set up in different ways and operate under different conditions.

TICs Comparison November 2009/10

Name of TIC	Footfall 2010	Footfall 2009	% change	Phone Calls 2010	Phone Calls 2009	Emails 2010	Emails 2009
Ashford	845	851	**-1**	232	230	274	310
Canterbury	23353	28943	**-19**	696	1025	121	174
DFH&RM	0	0	**n/a**	561	594	258	219
Dover	3208	3743	**-14**	354	477	380	392
Faversham	1114	1245	**-11**	115	109	79	38
Gravesend	2668	2165	**23**	253	269	366	213
Maidstone	5680	5415	**5**	396	390	33	26
Medway	15352	14515	**6**	779	840	446	444
Royal T. Wells	1330	4985	**-73**	375	490	133	178
STOP24	705	1070	**-34**	0	0	0	0
Thanet	2052	1697	**21**	131	87	37	8
Tonbridge	1436	1234	**16**	1436	448	191	167
Kent	**57743**	**75863**	**-24**	**5328**	**4959**	**2318**	**2169**

Please note that Tonbridge has had a change of structure, and Tunbridge Wells have changed their setup. Thanet is the name for the only remaining TIC in Thanet based at Margate, and so the figures now relate to the merged TIC enquiries and are not directly comparable until April 2011 onwards.

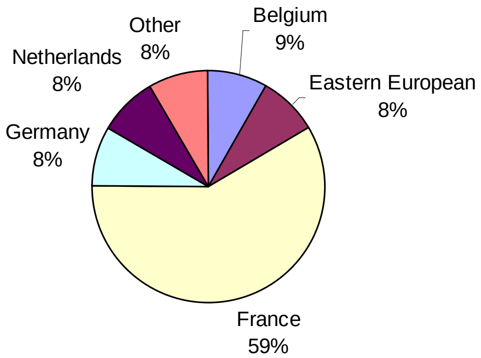
Factors affecting visitor numbers to the TICs in November 2010 (sic)

Economic climate and uncertainty
Bad weather, very cold, and snow.
Euro is (just about) strong enough for near-Continental neighbours to come here for Christmas shopping.
Our visitor numbers have increased due to the centre becoming an agent for National Express coaches and Eurolines which has become a very popular service. We are also holding talks at the centre twice a month which brings extra visitors.
Large number of groups
Pilot to deliver TIC services from a different site continuing.
More interest in local projects e.g. Turner Contemporary and Dreamland. New stock lines recently added to draw in visitors and locals.

Nationality of TIC visitors

Name of TIC	Domestic	Long Haul	European	Euro visitors compared to November 2009
Ashford	90%	3%	7%	Down 2%
Canterbury	40%	1%	59%	No figures
DFH&RM	80%	2%	18%	Up 16%
Dover	65%	12%	23%	Down 2%
Faversham	92%	3%	5%	Up 1%
Gravesend	88%	2%	10%	Up 7%
Maidstone	98%	0.25%	1.75%	Up 0.75%
Medway	70%	5%	25%	Up 5%
Royal T. Wells	98%	1%	1%	Down 9%
Thanet	98.5%	0	1.50%	Up 1.25%
Tonbridge	95%	2%	3%	No figures

Top countries of origin of Overseas TIC Visitors in November (%)



Accommodation

Due to the snow in November, personal and business events across the country were cancelled and so the associated accommodation was also cancelled. This is reflected in both sets of occupancy figures for Kent this month.

Larger hotel serviced accommodation

According to STR Global, room occupancy for the larger and chain hotels fell by nearly 2% in November. The year to date figure still showed occupancy as 3% up compared to 2009 and RevPAR up 1.9% for the year to date.

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

Smaller hotels, guest houses and B&B's

We are now one year into the RIBOS (www.ribos.co.uk/kent) system, and many of our respondents have added in their revised 2009 data. This has provided us with up to date comparison data for November 2009 as well as 2010.

Occupancy fell by 8% in November 2010, and this was attributed in the main to the heavy snow at the end of the month. Average length of stay for UK residents was 1.61 days, and for Overseas residents 1.77 days. 81% of occupancy was for UK residents.

Year on year occupancy comparison Kent

Kent	November 2008	November 2009	November 2010
Occupancy	45.4	51.13	42.92

Occupancy according to location

Location	Occupancy
Countryside/village	33%
Seaside	39%
Large town/city	52%
Small town	41%

Occupancy according to business type

Location	Average Occupancy
Bed and Breakfast	35%
Guest House	43%
Hotel/Inn	50%

Business Tourism

Number of business conferences taking place

2010	2009	% change
325	299	Up 9%

2009 was a poor year for Business Tourism, and so increases are based on this low base.

Number of weddings taking place

2010	2009	% change
14	8	Up 75%

Seven venues reporting offer weddings, and so care should be taken given the small size of the sample.

Number of other events taking place

2010	2009	% change
256	229	Up 12%

Comments from Business Tourism venues in November
Public sector budget cuts affecting us Special Offer wedding reception rates advertised earlier in the year
Starting to see the slow down of public sector bookings
Public sector cancelled 8 meetings this month due to cutbacks
Definite decrease in corporate business, but historically November very quiet
Snow - we had to postpone many, many events.
Snow and cold weather conditions
A better performing month than this time last year.

Length of conferences

Half a day	1 day	2 days	3 days or more
43%	49%	6%	2%

"Investing in your future" Cross-border Cooperation Programme 2007-2013 Part-financed by the European Union (European Regional Development Fund)

Average daily delegate rate for this month

£18 to £25	29%
£26 to £30	36%
£31 to £40	29%
£41 to £50	0%
£51 or more	7%

Origin of delegates

Kent	89%
London	5%
UK	7%
Other	0%

Visit Kent News

Visit Kent Research update

Visit England have produced a report on the average trip volumes and values, domestic and inbound, from 2006 – 2009 for the South East Region. The information is sourced from the UKTS (UK Tourism Survey) and the IPS (International Passenger Survey), and considers only inbound tourism and domestic overnight tourism as data is unavailable at county level for tourism day visits.

From the figures it can be seen that although Kent has the greatest number of staying visits of all the counties in the south east, Hampshire receive the highest amount of overnight tourism spend and domestic visits and spend.

	Total Visits ('000)	Total Spend (£m)	Domestic Visits	Domestic Spend	Inbound Visits	Inbound Spend
Kent	4,453	£624	3,592	£368	861	£256
Hampshire	4,236	£688	3,609	£463	627	£225
East Sussex	2,927	£626	2,342	£370	586	£256
West Sussex	2,195	£403	1,758	£265	438	£138
Oxfordshire	2,173	£466	1,576	£203	597	£263
Berkshire	2,097	£465	1,515	£223	582	£242
Surrey	2,036	£382	1,425	£164	612	£218
Buck'hamshire	1,309	£251	998	£146	310	£105
Isle of Wight	1,109	£246	1,059	£231	50	£ 15

The Visiting Friends and Relatives surveys will shortly be in circulation, incorporating where possible the suggestions made by stakeholders. The results will be available in April but Kent residents and visitors are being invited to complete the survey during January and February. You can find the survey shortly on our consumer website www.visitkent.co.uk.

Visit Kent Websites

Consumer website www.visitkent.co.uk.

Visits to the consumer site were up by 2%, and page views up by 10%

November 2009 unique visits	November 2010 unique visits
167,098	170,338

B2B website www.visitkentbusiness.co.uk

Visits to the B2B site were up by 15%, and page views by 32%

November 2009 unique visits	November 2010 unique visits
1,308	1,498

Visit Kent Marketing

2011 Visit Kent Magazine and Group Travel Guides are here!
We are delighted to have taken delivery of the Visit Kent Magazine for 2011 and the Group Travel Guide. As in previous years we have worked with KOS Media to produce the Visit Kent Magazine, which contains some of our stunning new Kent Contemporary photography, listings for all of our investors and many ideas for things to see and do across the county. The Group Travel Guide has been produced in association with Group Travel Organiser Magazine and will be distributed with the January edition. Please take a look at the online edition of the Visit Kent Magazine - http://www.visitkent.co.uk/explore/Kent-eMagazine.asp

Other News

Trends Update (144 - Visit Britain)

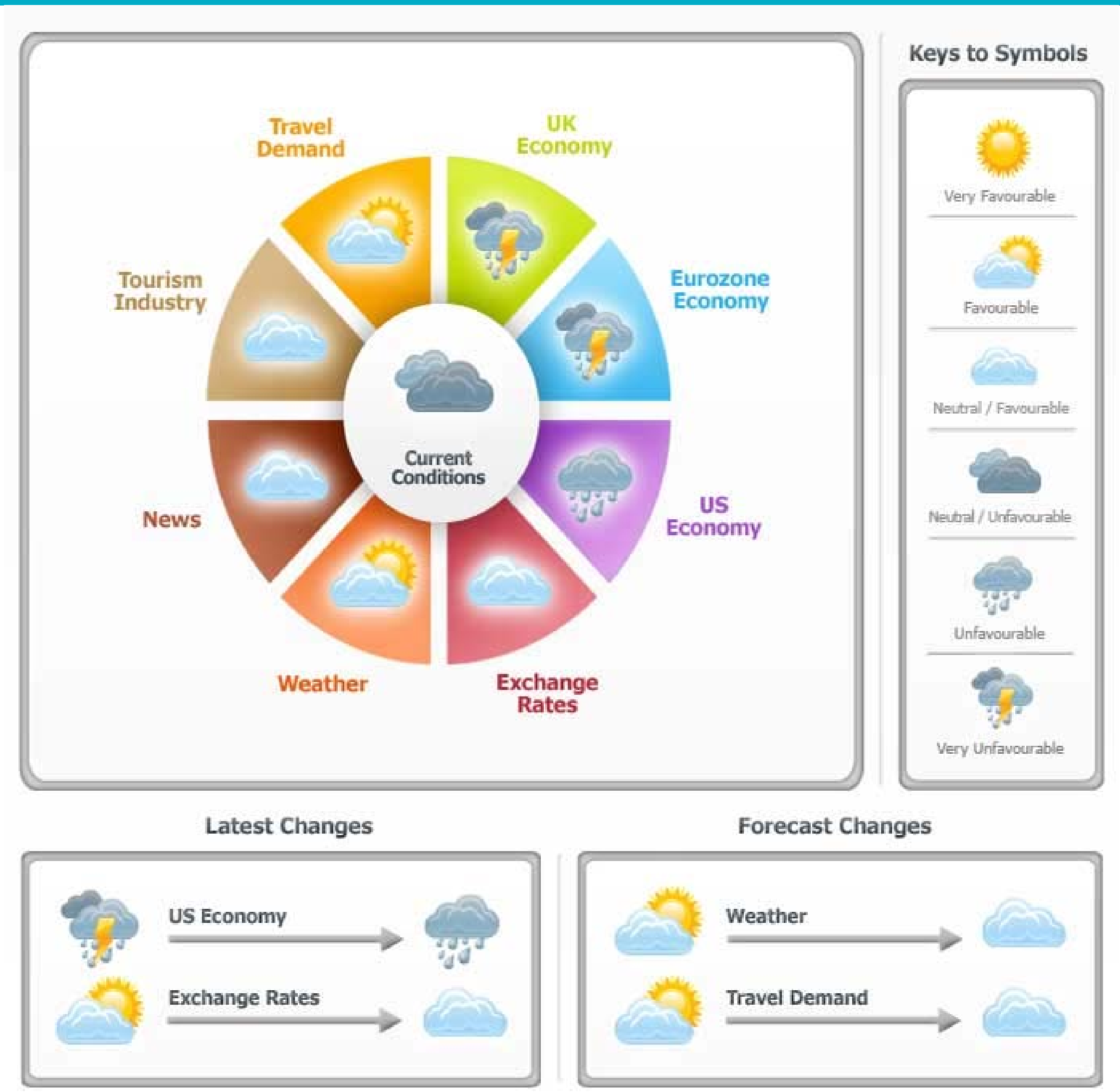
November BAA's six UK airports handled 1% more passengers than a year ago (BAA estimate that were it not for weather related disruption growth would have been 2.7%). Heathrow had its fifth consecutive record month with 5.2 million passengers. Traffic on domestic and routes to/from Ireland fell by more than 3%, however volumes on European scheduled routes rose 2.2%, on North Atlantic routes 4.3% and on other long-haul routes by 1.6%

Weather (Source BBC)

According to the BBC, the first three weeks of November were characterised by areas of low pressure moving across the UK from the Atlantic, giving plenty of rain and some strong winds at times. Subsequently, northerly then easterly airstreams brought much colder weather with some significant snowfalls

The snowfalls spread to eastern and southern England on the 30th including Lincolnshire, Kent and Surrey. Widespread transport disruption ensued with 400 lorries trapped on the M25 in Surrey overnight, difficult driving conditions and road closures elsewhere, Gatwick airport closed and rail service was delayed with many cancellations. This was the most significant spell of snow in November since that of late November 1965.

Visit Britain – Trends Update 142



Business Barometer Contacts:

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