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VISIT KENT BUSINESS GARDEN of ENGLAND

Kent Downs
Area of Outstanding Natural Beauty

Interreg EXPERIENCE- Analysis and Reporting of Kent Pilot Region: Business Needs Survey

27 November 2020

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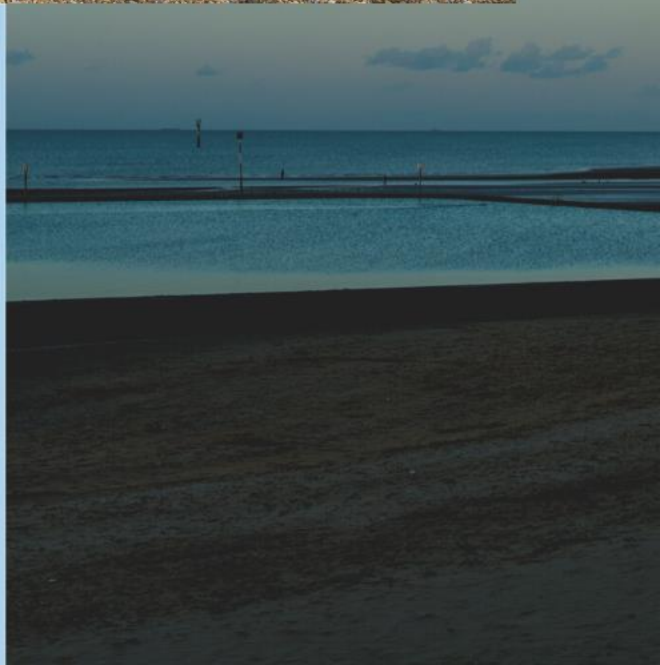
Contents



Introduction and Report Overview

This report looks to present findings from a recent survey, which aimed to capture the needs of visitor economy businesses in Kent. The survey focuses on identifying training and skills development businesses now need to inform and adapt their product offering.

This survey is part of the Interreg EXPERIENCE project, an exciting €23.3 million European funded project centred on the development of off-season bookable experiences, with a focus on overnight stays, to extend the tourism season. The growing demand for experiential tourism, fuelled by the consumer's desire to immerse themselves in new cultures and activities presents a strong opportunity for businesses and destinations to not only increase visitation in the shoulder months, but also to strengthen the resilience of the sector in the county. This demand will enable the creation of a new tourism strategy that moves away from the more traditional 'destination tourism' in the peak season and towards a more innovative and sustainable approach. The principle of sustainable tourism is also highly embedded in the project's approach and objectives, aiming to bring both economic and environmental benefits to communities and the wider destination. The topic of sustainability is one that is gathering increased attention and it is becoming increasingly important for organisations to adopt sustainable practices and initiatives, further emphasising the importance of the project. Lastly, the revenue generated will be used to protect and maintain historical and cultural attractions, that are integral to Kent's tourism landscape and product offering. These survey findings will be key in understanding business needs and the learnings will be used to help inform the structure of training and support, which will be delivered as part of the project. Findings will also offer considerable value to other elements of the project, allowing key recommendations and guidance to be created, that can be used to help support local tourism providers to develop bookable experiences.

Given the unprecedented situation and impact of the COVID-19 pandemic, outlining the implications of this will also be essential, to provide support and guidance to businesses and work to rebuild the sector and build back tourism better. To enrich the survey findings and create a picture of the current climate, the report will initially begin with a small secondary insights section, covering any relevant local or national research and trends. Following this the report will present the findings from the survey including sample characteristics and location, key markets prior to COVID-19, desired training programmes and questions around public transport and the last mile. Subsequently, the report will also contain three additional sub-sections, which will present findings that have been segmented by region for East, West and North Kent. And lastly key takeaways will be summarised and a list of recommendations will be complied to inform the next steps in this activity.

Understanding business needs to help structure training and support

Latest Research and Trends

Due to the unprecedented impact of the COVID-19 pandemic, businesses in the UK have experienced a significant loss of both domestic and international visits, with VisitBritain's 2020 forecast estimating a decrease of 74% in international arrivals compared to 2019. The forecast also estimates that this will equate to a loss of 79% in international spend.[1] VisitEngland's latest COVID-19 consumer sentiment tracker which looks to understand domestic intent towards overnight trips both within the UK and abroad, shows that restrictions on travel from the government is the leading reason why consumers do not feel confident in taking an overnight trip. However, general leisure intentions that are likely to attract more visitors as lockdown lifts include outdoor areas and activities.[2] Although due to the rapidly evolving situation and the introduction of a new stricter three-tiered system, domestic travel will inevitability fluctuate, as businesses and consumers face levels of uncertainty. However, looking to the medium and longer-term future, it will be vital to secure the long-term health of the visitor economy and use this time as an opportunity to strengthen productivity, drive innovation and resilience of the industry. VisitBritain highlights that by using the sector deal outcomes, the sector can look to boost the UK's profile as a leading destination through product development, data sharing and increasing inbound visitors and domestic staycations.

Although the trajectory of many consumer trends prior to the pandemic will have slowed, these will start to slowly pick up in the longer-term, however consumer behaviours and priorities will have inevitably altered. Therefore, it is crucial for businesses to align their efforts and strategic plans with these trends and changed habits. As highlighted in the Kent Options Analysis as part of the EXPERIENCE project, which looks to map the experiential product in the county, there has been a rise in the small group travel and bubble booking trend, which allows friends and families to reconnect in line with household limit restrictions. Overall, consumers will want to reconnect and create new shared experiences, with friends, families, and the natural environment. Consumers will be looking to improve general wellbeing, experience local and authentic places and as outlined in the trend 'transformative travel', create memorable moments and take part in experiences that will allow them to learn and feel positively changed.[4]

'An opportunity to strengthen productivity, drive innovation and resilience of the industry'- VisitBritain

Although COVID-19 has delayed certain trends, it has also increased others. In an article published by City/Nation/Place, research conducted by Mintel shows that digital consumption has increased dramatically, with consumers turning to digital alternatives as opposed to physical experiences. It also raises the importance of staying in touch with digital trends and for businesses to have the ability to adapt and keep in contact with consumers. It outlines that this can be achieved through the use of digital data to align budgeting and messaging with changing consumer sentiment and with the use of technology. [5]

In the rebuild it will also be vital to strengthen the interconnectedness among tourism business, to further build the industry's resilience.[6] At present the survival of many businesses is at risk, particularly smaller businesses that may be less resilient and businesses that are dependent on others through the supply chain and seasonality.[7] As outlined in a document published by UNWTO, enhancing collaboration, and developing partnerships between stakeholders both in the public and private sector will allow for a more sustainable and resilient tourism model. [6]

At present the main priority for businesses will be staying open or working to re-open and practices around adhering to health and safety guidelines and maintaining social distancing. But looking to the future, during the recovery and rebuild it will be essential that businesses look to adapt and engage effectively with consumers, through utilising current trends, data and by building partnerships to develop and diversify their offering.

'In the rebuild it will be vital to strengthen the interconnectedness among tourism business, to further build the industry's resilience and build back tourism better'- UNWTO

Survey Methodology and Sample

Data was collected with the use of an online survey sent out to Kent businesses via Visit Kent's, The Kent Downs AONB's and partners business databases. The survey itself was scripted and hosted by the University of Surrey, who are also partners in the project. Following this, data was sent to Visit Kent from the University to be analysed further for the purpose of this report. Data was imported to Snap Surveys software and any duplicates and incompletes up to an agreed point in the survey were removed for consistency and accuracy purposes, which resulted in a total sample size of 70 businesses.

All questions were analysed including both quantitative and open-ended questions, which were analysed by categorising responses by common themes to allow an overall picture to be presented for these particular questions. Results were also segmented by other variables such as busines type and location where sample sizes allowed, highlighting any findings that differed from the Kent wide results, to add further depth to findings and recommendations.

Alongside the research sources covered in the previous section, where possible findings from the survey will be cross referenced with other research. This included Visit Kent's COVID-19 Business Impact survey and the EXPERIENCE Options Analysis reports for both Visit Kent and The Kent Downs AONB, which looked to map the experiential product in Kent and identify various strengths, gaps and opportunities for product development and diversification.

Map displaying the locations of respondents by using postcodes and coloured coded by region. Source: Google Maps My Maps (2020)

Online survey sent out to Kent Businesses

70 Businesses

East Kent

West Kent

North Kent

Multiple Locations

Kent Business Needs Survey

KEY FINDINGS

The survey focuses on identifying training and skills development businesses now need to develop and adapt their out of season product offering.

84%

Interested in developing offer between October-March

Average % of business each season

Spring	Summer	Autumn	Winter
21%	43%	21%	15%

70

Kent Businesses

Online Survey

Top 3 Markets prior to COVID-19

1. Local/county
2. South East
3. London

59%

Of businesses have previously worked with the travel trade

Top 5 Training Programmes

1. Capitalise on local and regional events
2. Digital and Online Marketing
3. Upsell and increase return visits
4. Create Virtual Content
5. Learn Experiential Marketing Techniques

Other support needed included access to funding, help in bettering consumer confidence and other digital skills

Top potential partnerships for developing a new product

- Outdoor Activity Providers
- Community Groups
- Local Producers

Top 3 formats of training

- Instructor-led training
- Online Training
- Coaching or Mentoring

Group Discussions were most popular for training on co-producing marketing messages with DMOs

Case Studies ranked most highly for training on virtual content

56%

Of customers have asked for an additional service such as private tours and food and drink

BUSINESS NEEDS SURVEY FINDINGS:

KENT WIDE RESULTS

Business Type and Employees

The survey initially asked businesses to select which category their business fell into in terms of business type, for which they were able to select all that applied if they offered more than one service. Findings show that **53%** of all businesses selected multiple categories, with the remaining **47%** selecting just one type of business. Although the difference is small, this does indicate that the overall majority of businesses are currently offering a more diverse product offering. Looking at responses by business type, the largest proportion of businesses stated they offered accommodation with **40%**, followed by those selecting visitor attractions **(34%).** In addition to this, activity providers and food and drink providers were both selected by **31%** of businesses, followed by **30%** selecting event venue/organiser, as illustrated in figure 1 below. The survey then looked to establish how many employees businesses had, including any full or part-time staff and those on furlough. As shown in figure 2, the majority of businesses that completed the survey **(64%)** have between 1-10 employees, followed by **16%** who stated they have between 11-50. Businesses could also choose to specify their actual number of employees, of which **3%** did, and on average these businesses had 6 employees. And when looking at the job role of respondents, **77%** stated they were either in a managerial position or the business owner, followed by **11%** working in Marketing.

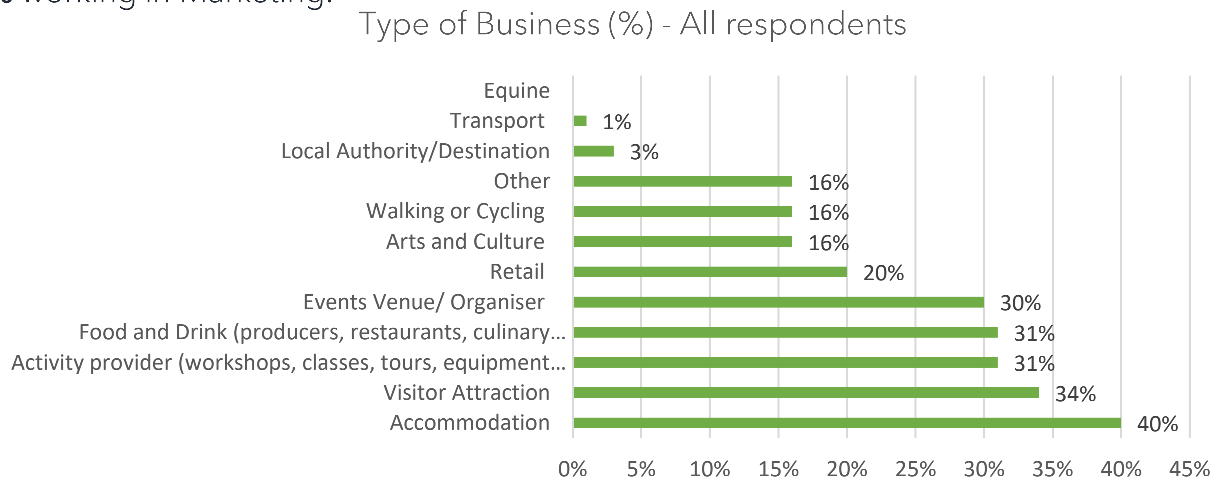


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Figure 1: Graph showing % of respondents that selected the above types of business

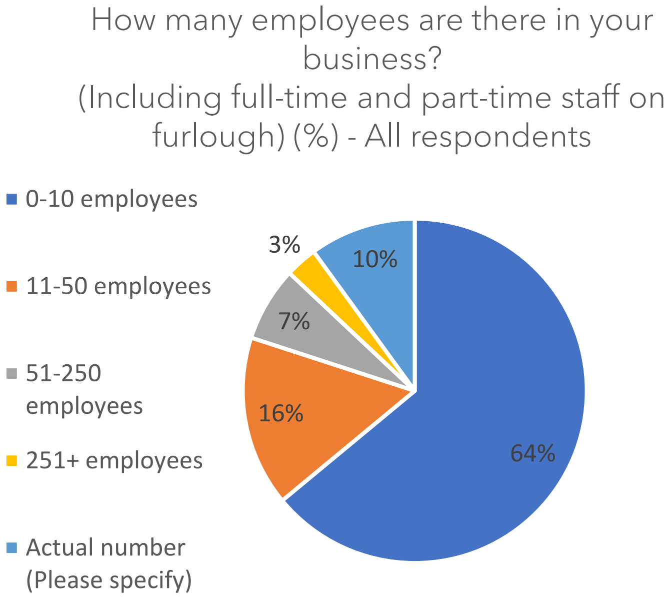

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Figure 2: Graph showing % of respondents that stated how many employees are in their business

Seasonal Staff, Volunteers and Staff Turnover

The survey then looked to gain an understanding into other areas of the business workforce, in terms of the proportion of their staff that are seasonal, in addition to the number of volunteers they have. Findings show that in terms of the seasonal staff, as shown in figure 3, **61%** of businesses had no seasonal staff, followed by **23%** having a seasonal workforce of up to **25%**.

Businesses were also asked to describe their usual staff turnover, by selecting which percentage of their staff change every year. Results show that a significant proportion of businesses stated they have less than **10%** staff turnover every year, followed by **10%** who stated they have between 10-25% staff changes per year.

What percentage of staff are seasonal? (%) – All respondents

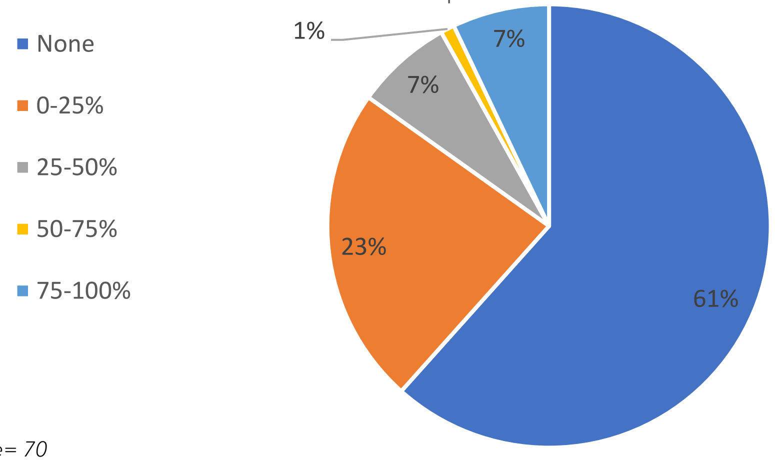

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Figure 3: Graph showing % of respondents that selected the above categories of seasonal staff

61% of businesses stated they have no seasonal staff

81% of businesses stated they have less than 10% staff turnover per year

66% of businesses stated they do not have any volunteers

Businesses were then asked to specify if they have any volunteers, with findings showing that the majority of respondents specified they did not have any volunteers, with **66%**. Although, the next largest percentage **(16%)** stated they have 21+ volunteers, as illustrated in the graph in figure 4 below.

If you have any volunteers, please indicate how many (%) - All respondents

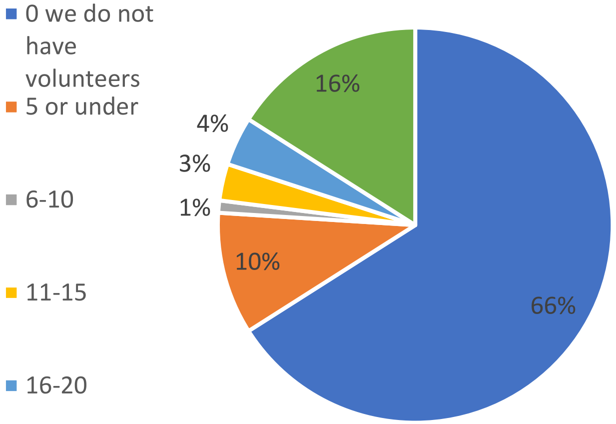

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Figure 4: Graph showing % of respondents that selected the above categories of volunteers

Location and Venue Type

The survey then looked to ask businesses about their location and type of venue. As seen in figure 5, the largest proportion of businesses **(20%)** were situated in Dover, followed by **16%** from Canterbury and **11%** from both Ashford and Folkstone and Hythe.

Businesses were also asked to select their type of venue, with results showing that the largest proportion selected a mix of both outdoor and indoor **(49%)**, followed by **36%** selecting indoor and **16%** outdoor. In addition to district, the survey asked respondents if they were located within The Kent Downs AONB area or within 3 miles of the North Downs Way National Trail. Out of the total sample, **37%** of businesses stated they were based within the Kent Downs AONB area, with **46%** stating they were not and the remaining **17%** selected 'don't know'. Awareness of being with 3 miles of The North Downs Way was fairly similar, with **34%** selecting 'yes', **46%** selecting 'no' and the remaining **20%** selecting 'don't' know'.

However, in order to establish the location of those that stated 'don't know' to both questions, postcodes provided were analysed. In the case of The AONB, all of those that selected 'don't know' were not in the AONB area. Although, for the North Downs Way, **30%** from this group were in fact 3 miles from the trail. Overall, findings show that there is a higher level of awareness around location and the AONB, with perhaps the need to increase this among businesses around their distance from the trail.

Businesses by type of Venue

Outdoor- 16%

Indoor- 36%

Mixed- 49%

Are you within the Kent Downs AONB?

Yes- 37%

No- 46%

Don't know- 17%

Are you within 3 miles of the North Downs Way National Trail?

Yes- 34%

No- 46%

Don't know- 20%

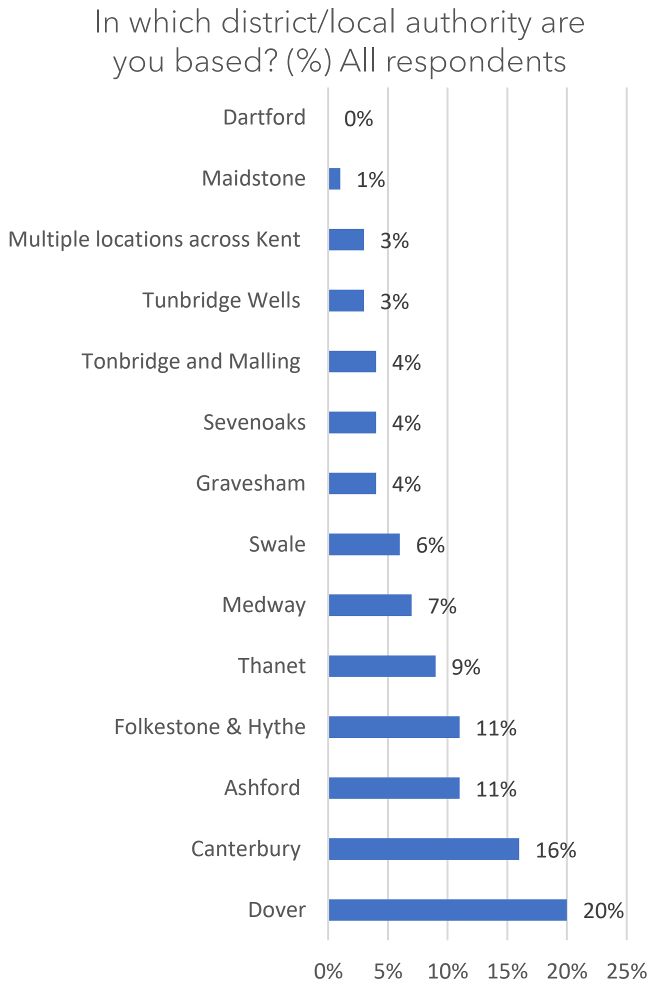

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Figure 5: Graph showing % of businesses based in each of Kent's districts

Key Markets and Travel Trade Activity

The survey also aimed to identify businesses' top target markets prior to COVID-19, alongside their engagement with working with the travel trade. As shown in the diagram below, the top three markets among all respondents were, local/county **(63%)**, South East **(59%)** and the London market **(46%)**. These were then followed by attracting visitors from the wider domestic area **(36%)** and those from European countries **(30%)** and groups **(29%)**. Businesses were also asked to what degree they work with the travel trade, with findings showing that the majority of businesses **(59%)** do in some capacity, although **41%** stated they did not work with the trade at all. However, this may be due to the sample including a number of smaller businesses, that may not be in the best position to cater for the travel trade market. When looking at these findings post-COVID-19, businesses' main target markets will most likely remain the same, albeit the domestic market may take even greater precedence given the growth in staycations and domestic tourism. Although, it will also be important for businesses to rebuild and attract international visitors when it is safe to do so, from near European markets and groups. Furthermore, in order to achieve this, increasing engagement with trade organisations is advantageous in developing a product offering that appeals to these markets. Lastly, it will also be important for businesses to cater for the changing needs of the travel trade following the pandemic, and findings from the EXPERIENCE travel trade survey will certainly help to inform this and provide additional insights for businesses.

1 Local/County   2 South East   3 London

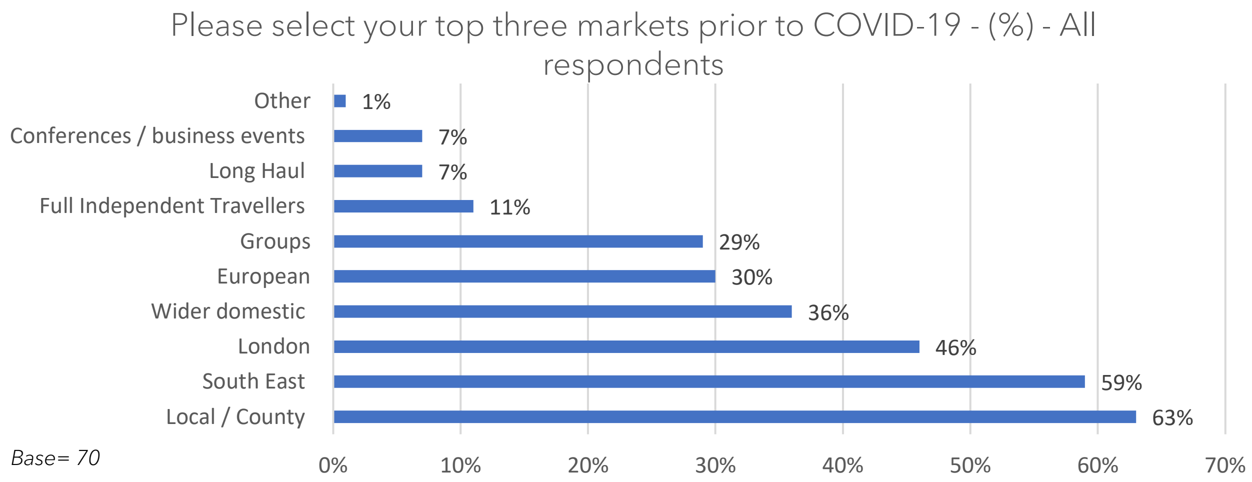


Figure 6: Graph showing % of businesses that selected the above as being in their top three markets prior to COVID-19

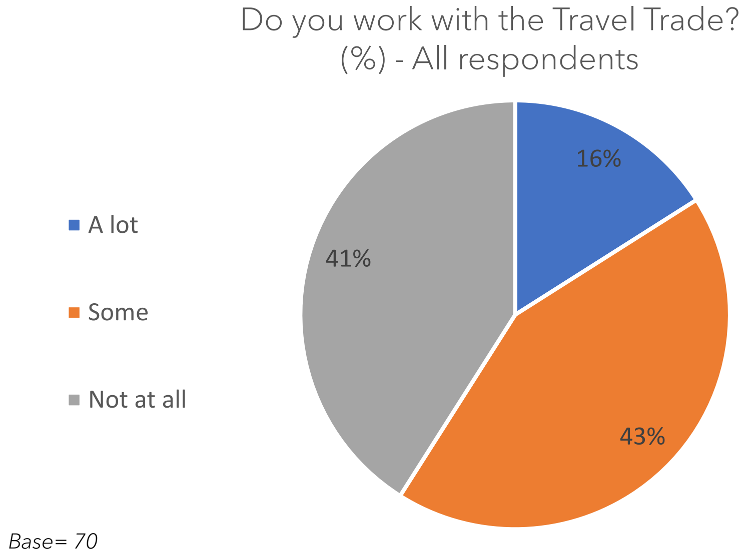


Figure 7: Graph showing % of businesses and the frequency to which they work with the travel trade

Key Markets and Travel Trade Activity: Business Type

Visitor Attractions

Although the top three markets for visitor attractions remained unchanged, a larger proportion selected local/county with 79%, compared to 63% for all businesses, showing the importance of the local market in particular to attractions.

67% have worked with the travel trade

Accommodation

As expected, for accommodation the top three markets differed, including wider domestic (57%), European (54%) and London and South East (both 43%). And a higher percentage selected FIT's, with 18% compared to 11% for all businesses. Overall, this shows the importance of markets outside the local area and overseas.

67% have worked with the travel trade

Events Venues

For event venues, the local and county market was particularly strong with 81%, compared to 63% for all businesses. And groups ranked higher with 43% compared to 29% overall.

71% have worked with the travel trade

Arts and Culture

Although the top three markets for arts and culture remained unchanged, a larger proportion selected local/county with 82%, compared to 63% for all businesses and the South East (82% vs. 59%), showing the importance of local and regional markets.

64% have worked with the travel trade

Activity Providers

Although the top three markets for activity providers remained the same, a larger proportion selected local/county with 77%, compared to 63% for all businesses and the London market (85% vs. 46%). And overall groups ranked higher with 46% compared to 29% overall.

60% have worked with the travel trade

Walking and Cycling

Again a larger proportion selected local/county with 77%, compared to 63% overall and for the London market (64% vs. 46%). In addition to groups with 36% compared to 29% overall.

64% have worked with the travel trade

Food and Drink Providers

For those providing food and drink services the top three markets remained the same, although a higher percentage selected local/county (77%), compared to all businesses (63%).

68% have worked with the travel trade

Retail

For those within the retail sector, the top three markets remained the same, although these were selected by a significant proportion- Local/county (86%), the South East (71%) and London (79%).

43% have worked with the travel trade

**% of activity covers both those that have worked with the trade 'some' and 'a lot'.*

Key Markets and Travel Trade Activity: AONB VS. NON-AONB

Looking at results based on whether businesses were located in The Kent Downs AONB, findings show that for travel trade activity, those situated within the AONB had a slightly lower level of engagement with trade organisations compared to those that were not (54% vs. 62%). However, overall for both groups the majority had engaged with the trade in some capacity.

Responses on key markets for businesses not situated in The Kent Downs AONB remained very similar to businesses overall, although a higher percentage (77% vs. 63%) selected Local/county. And for those businesses that were in fact situated in the AONB, the top three markets differed as seen in the diagram below.

AONB Businesses

1 The South East (54%)
2 Wider Domestic (50%)
3 London (42%)

Findings show that overall those within the AONB looked more towards markets further afield, which was also reinforced by a larger percentage selecting European (39% vs. 25%), Long-Haul (19% vs. 0%) and FIT markets (15% vs. 9%).

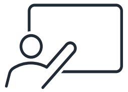
Overall, findings do show some differences between businesses in relation to location, particularly for those in The Kent Downs AONB, looking more towards international visitors and wider domestic audiences. However, in the case of attracting international visitors particularly post-COVID-19, activity and engagement with trade organisations could be increased for those in the AONB to assist and aid with this.

Support and Training Programmes

Types of Training and Format

As the main output from this research was to help inform the planning and structure of training programmes for businesses in the county, the survey looked to gain an understanding into what types of training and other support businesses require both on a strategic and operational level. Respondents were also asked to select the level at which they would be looking for this to be delivered, ranging from basic to intermediate and expert level. Businesses were asked to select up to ten areas of training that they felt their business would benefit from. Findings show that when combining interest for each type of training programme at basic, intermediate and expert level, the top three that emerged were- capitalising on local and regional events (82%), Training and support with digital and online marketing (80%) and guidance on how to upsell and increase return visits (79%). Others included experiential marketing techniques, storytelling around product offering and the creation of virtual content and photography. Businesses also selected several areas in the top ten around diversifying and working on collaborative ventures, such as adapting their business model in line with new trends, and working in partnership with other businesses and DMO's on designing new packages and marketing messages, alongside, welcoming international visitors. And although not in the top ten, other areas that are strategically important to the project also ranked highly. This included training on sustainable practices, which ranked 14th out of the 33 training programmes provided.

1. Capitalise on local and regional events
2. Digital and online marketing
3. Upsell and increase return visits
4. Create virtual content
5. Learn experiential marketing techniques
6. Adapt our business model to new trends
7. Design new packages in collaboration with other businesses
8. Welcoming international visitors
9. Co-produce marketing messages with destination management organisations
10. Create storytelling around products and services/ Photography

1  Instructor-led training

2  Online training

3  Coaching or mentoring

What format of training do you prefer?	%
Instructor-led training	67%
Online training	63%
Coaching or mentoring	57%
Group discussion and activities	50%
Peer-to-peer	40%
Case studies	26%
Role-playing	4%

And in terms of preferred format, the top two were instructor-led training and online training, followed by coaching or mentoring.. This shows a preference towards more expertise led training and online, with perhaps online training being prioritised more due to COVID-19 restrictions. This section will also include more in-depth analysis by business type in terms of training requirements.

Recommended Format and Level of Delivery

In order to enrich the findings of this research further and to help inform the delivery of training programmes, the table on the following page displays the top ten training programmes selected, and looks to outline the recommended level of delivery for each area.

Results show that the majority of programmes should ideally be delivered at a basic or intermediate level, with the exception of learning experiential marketing techniques, which scored fairly similar across all levels. And for upselling and increasing return visits, this was requested at a higher level, with **59%** selecting either intermediate or expert.

Looking at types of training in relation to format, the last column displays the percentage of businesses that selected each format for that particular programme. Overall, the results show that the top three formats remained unchanged, however, instructor-led training was particularly prominent for delivering both digital and online marketing and creating storytelling around products and services. And although instructor-led training was the top selected format for the majority of training programmes, online training was the top selected by those looking for training on upselling and increasing return visits, alongside guidance on how to capitalise on local and regional events.

When looking at lower scoring formats (as highlighted in the table in green), group discussions and peer-to-peer scored higher for training around co-producing marketing messages with DMO's. And finally, the use of case studies ranked highest for those looking for guidance around creating virtual content. The table of the following page highlights the top 10 training programmes selected by businesses, including any that scored equally. However, in order to see where each training programme ranked, a full table of results can be found in appendix 1.

Type of training programme	None (%)	Basic (%)	Intermediate (%)	Expert (%)	Total at all levels (%)	Recommended level(s)	Recommended format(s)
Capitalise on local and regional events	17%	31%	41%	10%	82%	Basic/ Intermediate	Online training **67%** Instructor led training **66%** Coaching or mentoring **59%** Group discussion **52%** Peer to peer **40%** Case studies **28%** Role playing **5%**
Digital and online marketing	20%	9%	47%	24%	80%	Intermediate	Instructor led training **71%** Online training **59%** Coaching or mentoring **59%** Group discussion **54%** Peer to peer **45%** Case studies **23%** Role playing **2%**
Upsell and increase return visits	21%	20%	36%	23%	79%	Intermediate/ Expert	Online training **66%** Instructor led training **64%** Coaching or mentoring **56%** Group discussion **56%** Peer to peer **44%** Case studies **24%** Role playing **6%**
Create virtual content	24%	16%	39%	21%	76%	Intermediate	Instructor led training **70%** Online training **66%** Coaching or mentoring **62%** Group discussion **57%** Peer to peer **45%** Case studies **45%** Role playing **4%**
Learn experiential marketing techniques	24%	24%	26%	26%	76%	All levels	Instructor led training **66%** Online training **62%** Coaching or mentoring **62%** Group discussion **53%** Peer to peer **43%** Case studies **23%** Role playing **2%**
Adapt our business model to new trends	27%	24%	33%	16%	73%	Basic/ Intermediate	Instructor led training **67%** Online training **65%** Coaching or mentoring **59%** Group discussion **59%** Peer to peer **43%** Case studies **24%** Role play **6%**
Design new packages in collaboration with other businesses	27%	23%	31%	19%	73%	Basic/ Intermediate	Instructor led training **67%** Coaching or mentoring **65%** Online training **61%** Group discussion **55%** Peer to peer **49%** Case studies 26% Role playing **6%**
Welcoming international visitors	29%	31%	29%	11%	71%	Basic/ Intermediate	Instructor led training **70%** Coaching or mentoring **60%** Online training **56%** Group discussion **52%** Peer to peer **40%** Case studies **30%** Role playing **6%**
Co-produce marketing messages with destination management organisations	30%	29%	26%	16%	71%	Basic/ Intermediate	Instructor led training **65%** Coaching or mentoring **65%** Online training **63%** Group discussion **61%** Peer to peer **51%** Case studies **25%** Role playing **6%**
Create storytelling around products and services	31%	20%	34%	14%	68%	Intermediate	Instructor led training **75%** Online training **69%** Coaching or mentoring **63%** Group discussion **60%** Peer to peer **42%** Case studies **27%** Role playing **4%**
Photography	31%	21%	31%	16%	68%	Basic/ Intermediate	Instructor led training **65%** Online training **65%** Coaching or mentoring **60%** Group discussion **56%** Peer to peer **44%** Case studies **23%** Role playing **4%**

Figure 8: Table showing the top ten types of training programmes selected by businesses, in addition to recommended levels and format

Training Programmes: Business Type

Findings around desired training programmes were also analysed according to business type and location. The following insights highlight any areas that differed significantly from results for all businesses.

Accommodation

For businesses that selected they offered accommodation, their top ten were fairly similar. Although it did include - creating a unique selling proposition, how to welcome and attract visitors for the active rural market and support to help understand the wider destination in terms of the landscape, heritage and wildlife. This shows a preference to engage more in outdoor areas with the wider destination.

Visitor Attractions

For visitor attractions, the top ten included the desire for training on how to improve sustainable practices, alongside improving more basic digital skills. This also included understanding the needs of different visitors including accessibility needs and understanding the wider destination in relation to recommendations and cross-selling.

Retail

For those offering retail, the top ten training programmes included areas such as guidance on how to diversify activity into tourism and understanding the wider destination in terms of recommendations and cross selling. Retail providers also favoured understanding needs of different visitors including those with accessibility needs, alongside gathering and interpreting data and how to create a unique selling proposition.

Walking & Cycling

For those that offered walking and cycling services, the top ten also included, training on how to understand international visitors and guidance on improving sustainable practices. Alongside this, they also displayed a preference for training on how to welcome and attract visitors for the active rural market and to gain an understanding into the needs of different visitors including accessibility needs.

Food & Drink

For food and drink providers, the top ten remained very similar to findings for all businesses with the exception of the inclusion of training around improving sustainable practices

Activity Providers

For activity providers, their top ten training programmes also included working with the travel trade, gathering and interpreting data, understanding the wider destination in terms of recommendations and cross selling and support to create a unique selling proposition.

Arts & Culture

Arts and Culture related businesses also favoured working with the travel trade compared to businesses overall, in addition to understanding the wider destination in reference to recommendations and cross selling. This group also expressed a greater interest in understanding tourism supply and demand.

The Kent Downs AONB

When comparing training needs with those not located in the AONB, AONB businesses rated training on how to welcome and attract visitors from the active rural markets including activities such as cycling, walking and horse-riding more highly (77% vs. 45%). Findings also show that support on how to understand the wider destination in terms of landscape, heritage and wildlife was also favoured (65% vs. 62%). And finally, training on how to offer local tours and guided activities was selected by a larger percentage of businesses in the AONB, compared to those that were not. And in terms of level of delivery, for training on the active rural market and understanding the wider destination's landscape, heritage and wildlife, the majority of AONB businesses requested this at a higher level (either intermediate or expert level).

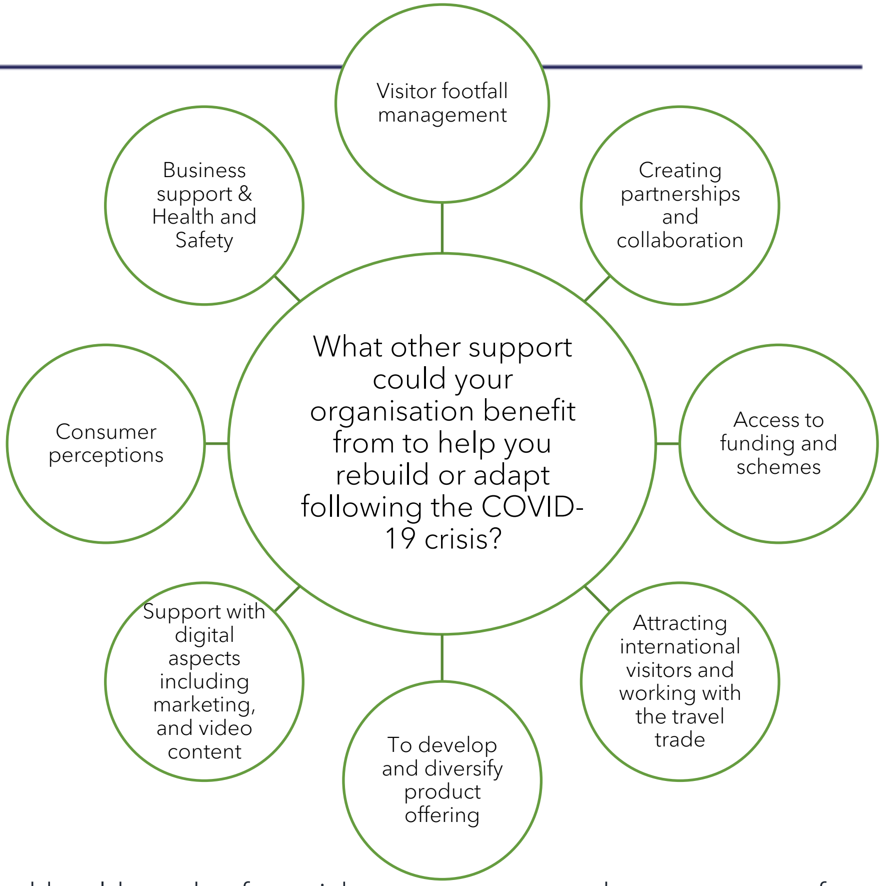
Event Venues

In terms of findings for event venues and organisers their top ten differed slightly with the inclusion of training on - improving sustainable practices, and creating a unique selling proposition.

EXPERIENCE Options Analysis-
The Options Analysis, which looked to map the experiential product for the North Downs Way and the Kent Downs AONB, identified bookable experiences such as guided walks and tours as an opportunity for growth. This, together with the trend in rise of bike sales in 2020 due to COVID-19, present an ideal opportunity to develop these product offerings around walking tours, cycling, which can be strengthened by training on the active rural market and delivering local tours and guided activities, as mentioned in the findings above.

Other Support

In addition to specific types of training the survey asked businesses what other support their organisation would benefit from, to help rebuild or adapt following the COVID-19 crisis. Data was analysed by sorting answers into common themes, with the following areas emerging.



- Footfall Management- A number of businesses cited the need for support with managing visitor footfall, relating to either increasing their footfall during quieter periods or dealing with fluctuating numbers due to COVID-19 and various changing restrictions.
- Partnerships and Collaboration- Another theme around support that emerged was the desire to work with other local organisations to create a joined up approach. Working to re-build and co-market the wider offering to create experiences particularly in the off-season.
- Support with digital marketing and design- Businesses also raised the need for support with digital marketing including building digital campaigns across multiple platforms, website improvements and creation of virtual experiences and video creation. Alongside, bettering their overall skills in design and understanding of tech and IT options.
- International visitors- Support to help welcome international visitors back was raised and more specifically, visitors from European countries and group and coach bookings.
- Development and diversification of product offering- Support to help develop and adapt offering in the current climate and expand to other areas safely and within the relevant guidelines.
- Business support and health and safety- Another common theme was the need for guidance around health and safety, risk assessments and procurement for PPE. As well as other general support including, insurance protection, planning advice and procedures for taking on new staff.
- Consumer perceptions and funding schemes- Other support mentioned included understanding consumer needs and messaging around building consumer confidence. In addition to guidance on accessing funding schemes and grants.

Visit Kent COVID-19 Business Impact Survey & September 2020 Business Barometer

Findings from Visit Kent's COVID-19 Business Impact Survey and September Business Barometer echoed the need for business support in relation to accessing additional funding and Government schemes, alongside concerns around loss of visitor footfall and revenue.[8] Businesses' desire for support around implementing health and safety measures were also mirrored in these reports, alongside how they can effectively communicate this to consumers and work to rebuild visitor confidence. [9]

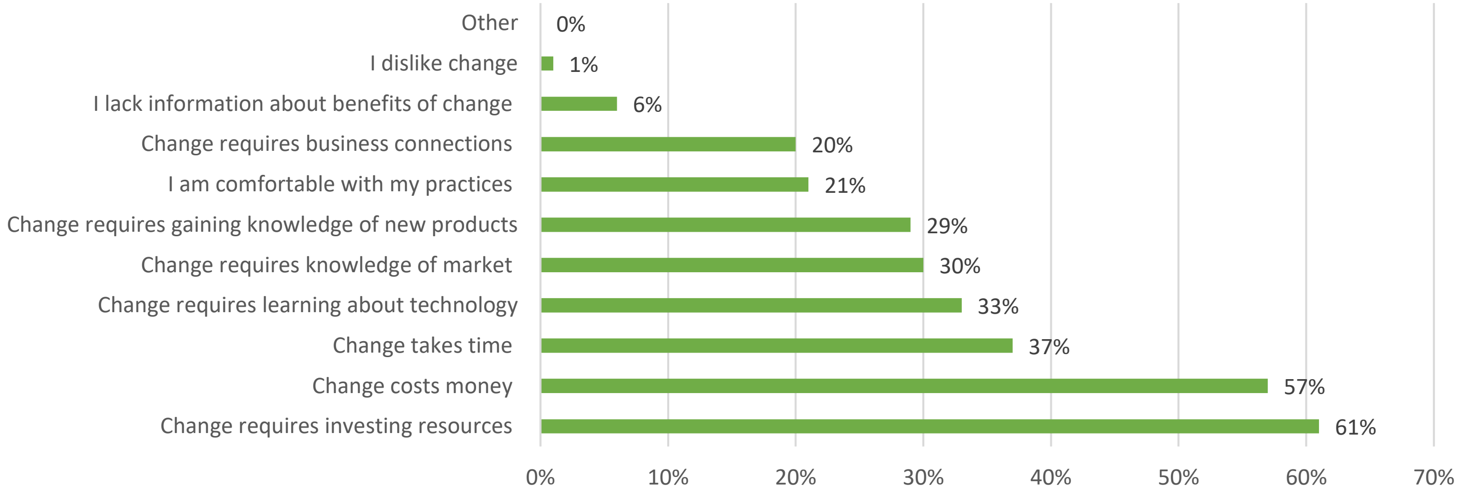
Product Development

Barriers to adapting

To understand ways in which businesses can adapt following COVID-19, businesses were also asked which barriers to change applied to them from a list of pre-defined areas. Findings show that the top three barriers centred on change requiring investment of resources (81%), money (57%) and that change takes time (37%). This was then closely followed by barriers surrounding knowledge of technology (33%), which further emphasises the importance placed on delivering training and support to businesses around using digital platforms and IT systems.

Other barriers included the need to gain knowledge of the market (30%) and new products (29%). Again, these areas tie in with support and guidance needed to help develop and diversify product knowledge and offering and gain insights from relevant markets and how to tailor messaging to them.

As a result of COVID-19 many businesses are having to adapt. Which of these barriers to change apply to you? (%) - All respondents



Base= 70

Figure 9: Graph showing percentage of respondents each factor as a barrier to adapting

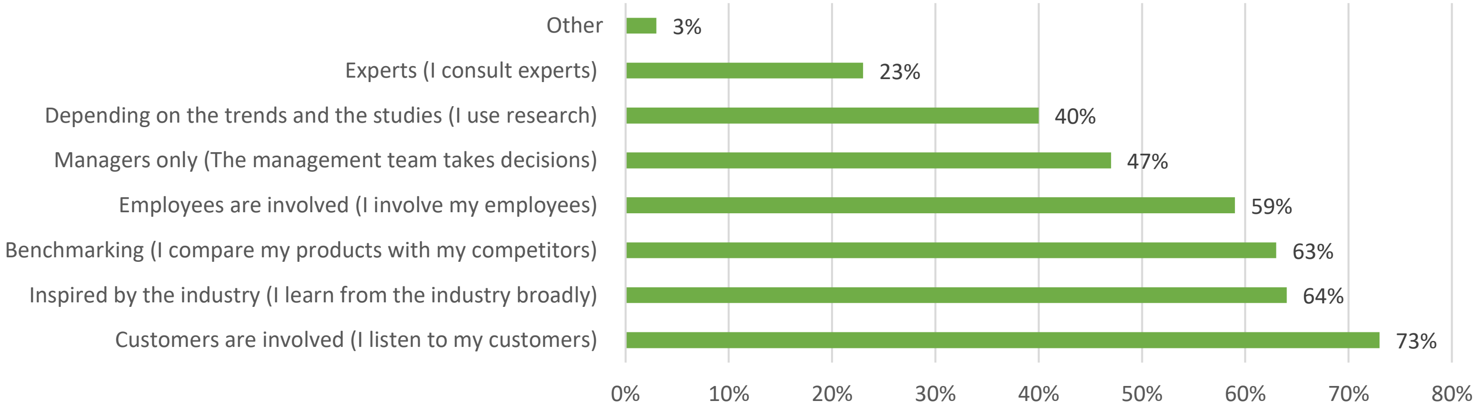
Product Creation and Customer Feedback

The survey then looked to gain an understanding into how businesses create products or services for their customers, alongside the tools or platforms they utilise to collect customer feedback. Findings show that the predominant method for product creation is the use of customer insights, selected by **73%** of businesses. This was then followed by **64%** who stated that they look for inspiration from the industry and **63%** selecting that they use benchmarking, looking to their competitors to compare their own product offering against. When looking at findings for this question in relation to business type, for visitor attractions, event venues, food and drink providers and arts and cultural businesses, employee involvement in product creation was ranked in the top two.

Businesses were then asked if they collect customer feedback from a list of channels. Results show that the top channel for collecting feedback was face-to-face, followed by social media and TripAdvisor. And for both retail and food and drink providers, use of social media was ranked as the top channel for sourcing customer feedback.

Face-to-face 74% Social Media 69% TripAdvisor 51%

How do you create products or services for your clients? (%) – All respondents



Base= 70 *Figure 10: Graph showing percentage of respondents that stated they use the above methods to create products or services for their clients*

Additional Services

To further explore the idea of product development and diversification, the survey asked businesses if their customers ever ask for a service that their company cannot provide. Findings show that 56% of businesses stated that their customers have asked for a service that they don't currently provide, followed by 31% that stated 'no' and the remaining 13% stating they had not thought about it. Furthermore, this indicates that consumers are looking for more business diversification and supports the need for businesses to use this as opportunity to increase visitor spend and visits in quieter periods. Data for this question was analysed by sorting answers by common themes, with the following areas emerging most strongly.

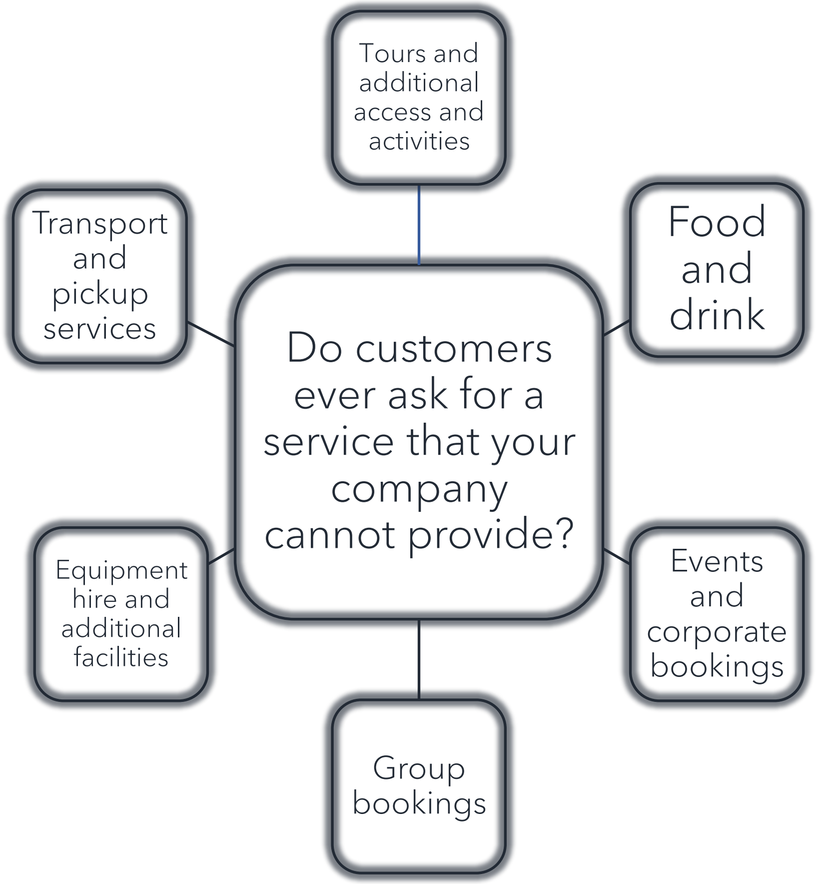
- Tours and additional activities- One of the main themes to emerge from this question was centred on customers requesting tours, access to additional areas and other activities. More specifically, this included experiential tour offerings, additional courses, cycling tours and animal experiences.

- Food and Drink- Another area cited was the introduction of food and drink services, including takeaways.

- Events- A number of businesses raised requests from customers around the desire for outdoor events and enquiries into if they offered event space and catered for conferences and weddings.

- Transport- Some businesses cited customers previous requests for transport services to provide pick up services from locations outside of the area and transport from London airports or the port.

- Groups/Equipment hire- Other points raised by businesses included requests to accommodate larger group bookings, alongside offering more equipment hire.



Visitor Footfall and Seasonality

As one of the central aims of the wider project is to help extend the tourism season, the survey asked businesses if they would be interested in developing their out of season offer, between October and March. Overall, **84%** of businesses said they were interested, with only **9%** stating 'no' and the remaining **7%** stated they have not thought about it. However, these results clearly demonstrate the willingness and interest from businesses to explore this and look at ways to extend the tourism season out of summer months, and given the impact of COVID-19, diversification and adaptation will be vital in the rebuild.

Businesses were also asked to provide their annual visitor footfall figures for 2019, prior to the COVID-19 pandemic. On average this resulted in an annual footfall of **25,861**, which is most likely reflective of the sample consisting of smaller businesses. Subsequently, businesses were also asked to specify what percentage of their business is delivered in each season during a typical year. The below figures on based on the average percentage for each season, and highlights the prominence of summer tourism, with other seasons, particularly winter, receiving considerably less business. Findings for business type were consistent with the overall averages with the exception of arts and cultural, which saw the highest proportion of business out of season. This perhaps indicates this sector's appeal on a more year round basis, alongside the opportunity for businesses to partner with those in art and culture. Overall, this reinforces the need and opportunity to develop off-season products and experiences, to ease tourism hotspots and reliance on summer tourism and to bring additional income to businesses through new seasonal products and services.

Seasonality

Spring

21%

The percentage of business in a typical year during spring among all types of businesses were fairly consistent ranging from 19%-24%

Summer

43%

The summer months brought the highest proportion of business, which the exception of arts & culture that saw 29% in summer. And accommodation and outdoor attractions (both 51%) seeing the highest averages.

Autumn

21%

Looking to autumn, results among all types of businesses ranged between 18%-23%, again with the except of arts & culture seeing an average of 29% during the autumn season.

Winter

15%

All businesses experienced the lowest percentage of business during the colder winter months ranging from 9% for accommodation to 20% for arts & culture businesses.

Partnerships and Collaboration

As an integral element of product diversification, the survey asked businesses if they would be interested in developing a new product in partnership with a range of different businesses.

Results show that the most commonly selected business to develop a new partnership with were outdoor activity providers, with **54%** of businesses selecting this. This was then followed by a desire to engage and work with community groups **(52%)** and local producers **(49%).**

In addition to these, as shown in figure 11, other partnership possibilities that ranked highly included businesses operating in the hospitality field **(46%)** alongside transport, events and environmental and nature activities/education **(all 42%).**

Outdoor activity providers 54%

Community Groups 52%

Local Producers 49%

These findings certainly highlight potential partnership opportunities, and by helping to facilitate these and offer businesses guidance and case studies on examples of successful product creation and collaboration, it can help move businesses towards a more joined up collaborative approach. And through the development of packages, there is an opportunity to increase length of stay and overnight trips.

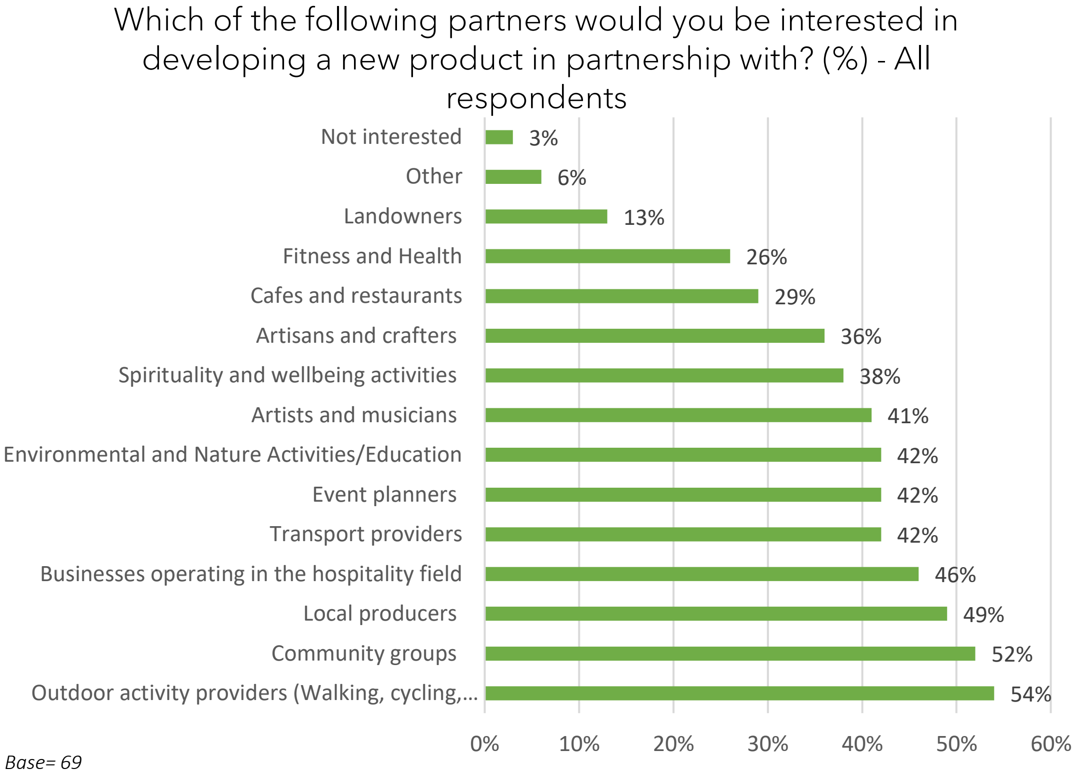


Figure 11: Graph showing the percentage of respondents that were interested in developing a new partnership with each organisation

EXPERIENCE Options Analysis

This research highlighted the appeal of outdoor activities and the natural environment following COVID-19, tying in with the trend of bettering wellbeing and reconnecting, alongside the trend of local produce and authenticity- and that these offer an opportunity to attract visitors. It also gave insight into the value of additional triggers points for certain businesses that may not be the main reason for travel, such as food and drink and heritage to attract certain markets, which can evolve and develop through partnership working and offer customer experiences and packages.

Partnerships and Collaboration: Business Type

Responses regarding possible partnerships were also analysed according to business type in order to delve deeper into opportunities for collaboration and what products can be joined up to create new products. One of the main findings when looking at type of respondents is that when it came to those that selected partnerships within outdoor activity providers, this was most predominantly selected by businesses that were situated within the Kent Downs AONB **(73%)**, those within three miles of the North Downs Way **(71%)**, alongside accommodation providers **(68%)**. This may present an opportunity for packages and partnerships to be created that incorporate outdoor activities with an overnight stay in more rural areas. When it came to a desire to engage with community groups, this was particularly important to businesses with an arts and cultural offering **(100%)**, showing the importance of community and local engagement to this sector.

Developing partnerships with local producers, was highest for businesses with a walking and cycling **(73%)**, retail **(79%)** or food and drink **(77%)** offering. This illustrates the opportunity for theses businesses to engage with local producers and tap into trends around locally sourced produce, to allow customers to also experience local food and drink, while also reducing food miles and supply chain security.

Businesses in the AONB had a much higher interest in developing a new product in partnership with outdoor activity providers compared to those not in the AONB- 73% vs. 42%

In terms of those that favoured partnerships with businesses operating in the hospitality field, this included walking and cycling and arts and culture **(both 64%)**, compared to **46%** for all businesses, showing eagerness to collaborate with wider organisations within the hospitality industry. Lastly, activity providers **(68%)**, retail **(71%)** and walking and cycling **(73%)** valued potential partnerships with environmental and nature activities/education more, compared to businesses overall. Overall, for businesses based in more rural settings including those that offer walking and cycling show a focus towards diversifying into additional outdoor and nature based activities, with the opportunity to develop this in line with wellbeing trends and appeal of open spaces post COVID-19, with activity providers also highlighting their preference for partnerships with spirituality and wellbeing activities **(59%)**. A full table of results for partnerships by business type can be found in appendix 2.

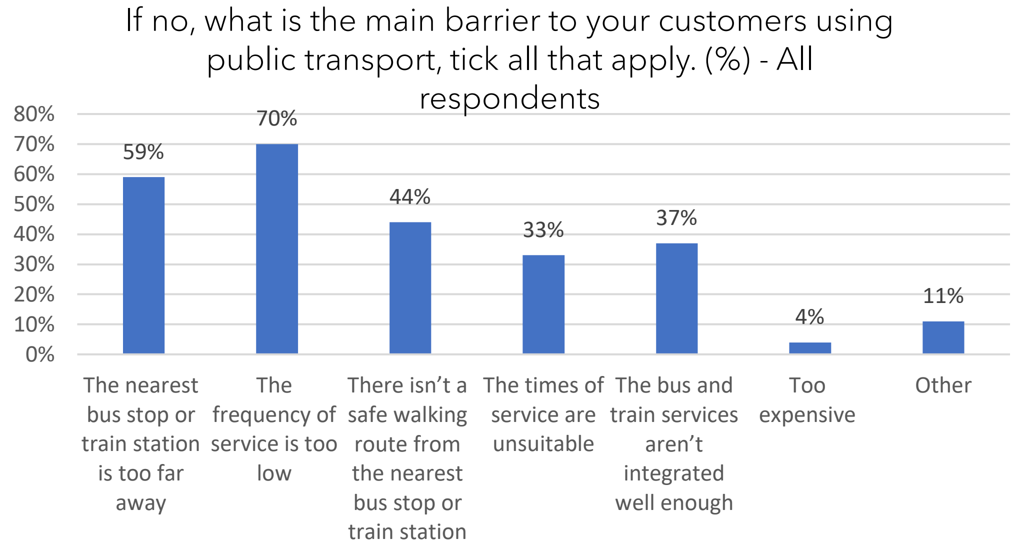
EXPERIENCE Options Analysis

The report highlighted the opportunity for businesses and destinations to utilise and incorporate the underlying benefit of wellbeing, particularly in rural destinations and the various opportunities to link up products such as walking trails, local produce and vineyard visits, with food and drink continuing to be the top-ranking bookable experience on both TripAdvisor and Airbnb.

Transport

Public Footpaths and Barriers to Public Transport

This section of report outlines the findings from the survey that looked to examine businesses perceptions around public transport and accessibility, with the overarching aim to help businesses utilise public transport connections, last mile footpaths and cycle routes to attract both domestic and international visitors. Not only does maximising public transport help businesses to become more accessible, but it also helps to reduce a journey's carbon footprint and contribute towards sustainable efforts and tackling climate change. It is vital to work with businesses on the last mile, and ensure this is effectively communicated to customers, if that be via bus, train or walking routes and cycle paths. This also involves ensuring routes are easy to plan and book, to achieve a more integrated approach. Initially the survey asked businesses if there is a public footpath linking their business to the nearest train or bus station.



Base= 27 *Figure 12: Graph showing the main barrier to customers using public transport*

Findings show that **64%** stated there is a public footpath, with **28%** stating there was not and the remaining **9%** stated they did not know. Businesses were then asked if overall they felt their business is sufficiently serviced by public transport, with **61%** stating 'yes' and **39%** 'no'.

Following this, those businesses that felt they were not sufficiently serviced by public transport were asked to select what barriers they felt there were to their customers using these services during their visit. The findings from this question show the major barrier is the frequency of services being too low **(70%)**, in addition to the nearest bus stop or train station being too far away **(59%)** or that there isn't a safe walking route from the nearest bus stop or train station **(44%)**.

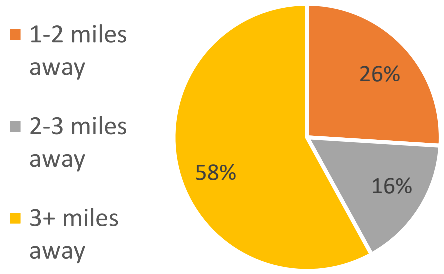
Reducing a journey's carbon footprint and contributing towards sustainable efforts and tackling climate change

Distance from Public Transport Services

Following this, if businesses selected that either the nearest train station or bus stop was too far away or that there isn't a safe walking route, respondents were asked to specify how far away the nearest train station or bus stop was.

The results in the pie charts below show that for **58%** of businesses, the nearest train station is over three miles away, followed by 1-2 miles away for **26%** of businesses. And when it came to proximity to bus stops, the largest proportion **(42%)** specified there was a stop located within 1-2 miles from their businesses, closely followed by **37%** selecting 'under 1 mile away'. These findings show that the proximity to bus stops is nearer compared to train stations, however when looking at barriers the frequency of services may be too low for this to be advantageous. This perhaps highlights the opportunity for bus routes to be tweaked or safe walking routes to be added. So respondents were then asked what frequency would be sufficient to service visitors. Results show that **42%** felt this needed to be every hour, followed by **37%** selecting every 30 minutes, and **21%** every 2 hours. Overall, there are barriers around distance to overcome, however by working with transport providers to rethink services, ticketing and overall business model in favour of leisure travel, progress can be made to bettering businesses accessibility.

How far away is your nearest train station? (%) - All respondents



How far away is your nearest bus stop? (%) - All respondents

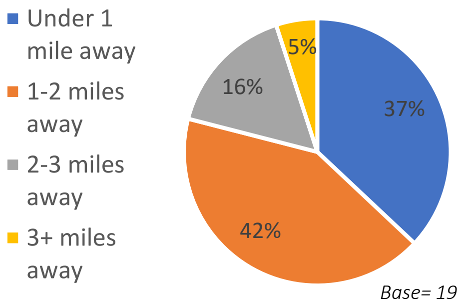


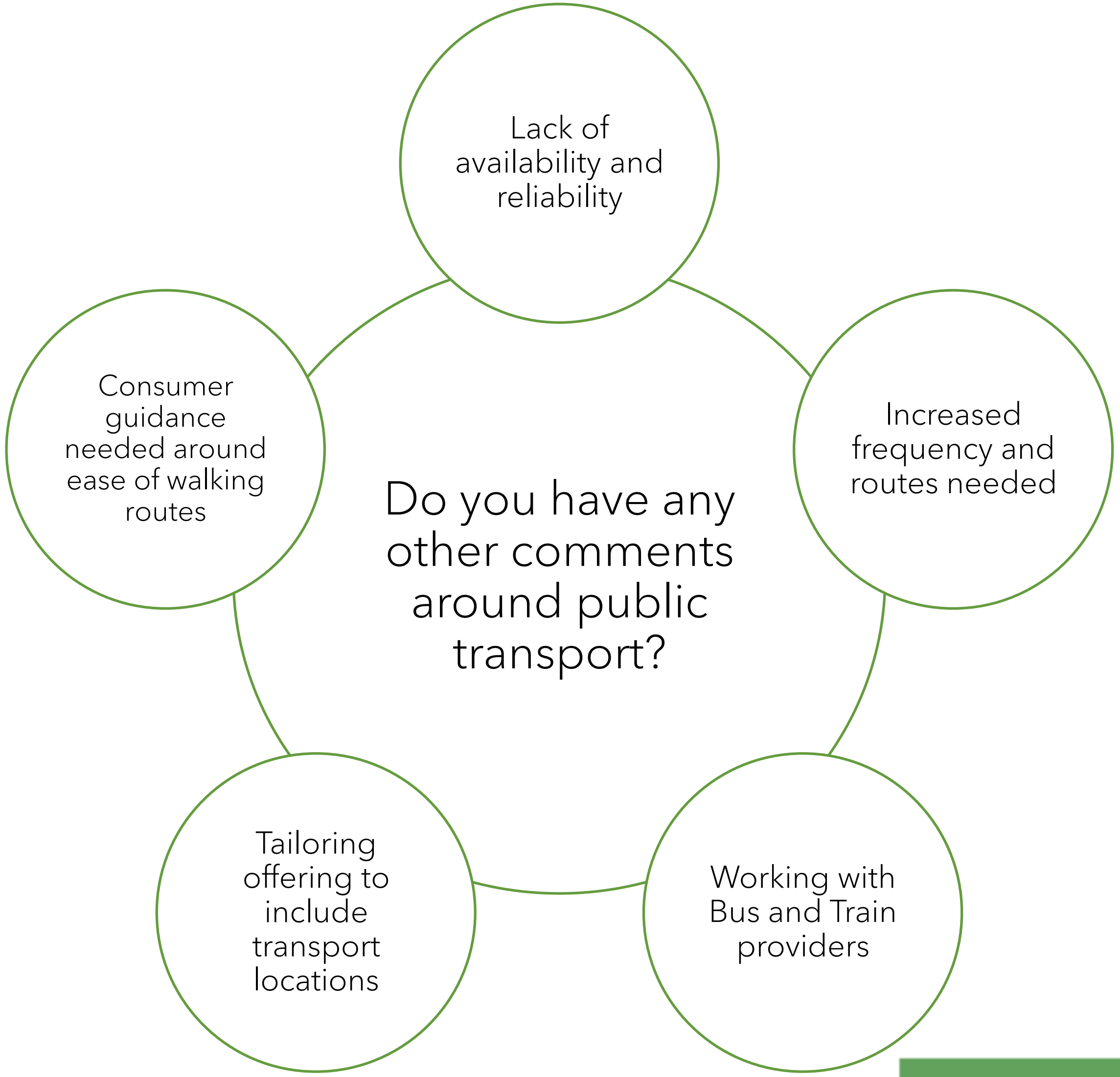
Figure 13: Graphs showing how far the nearest train station and bus stop is from businesses

Promoting alternative walking and cycling routes alongside transport may aid towards bettering accessibility

Public Transport- Other Comments

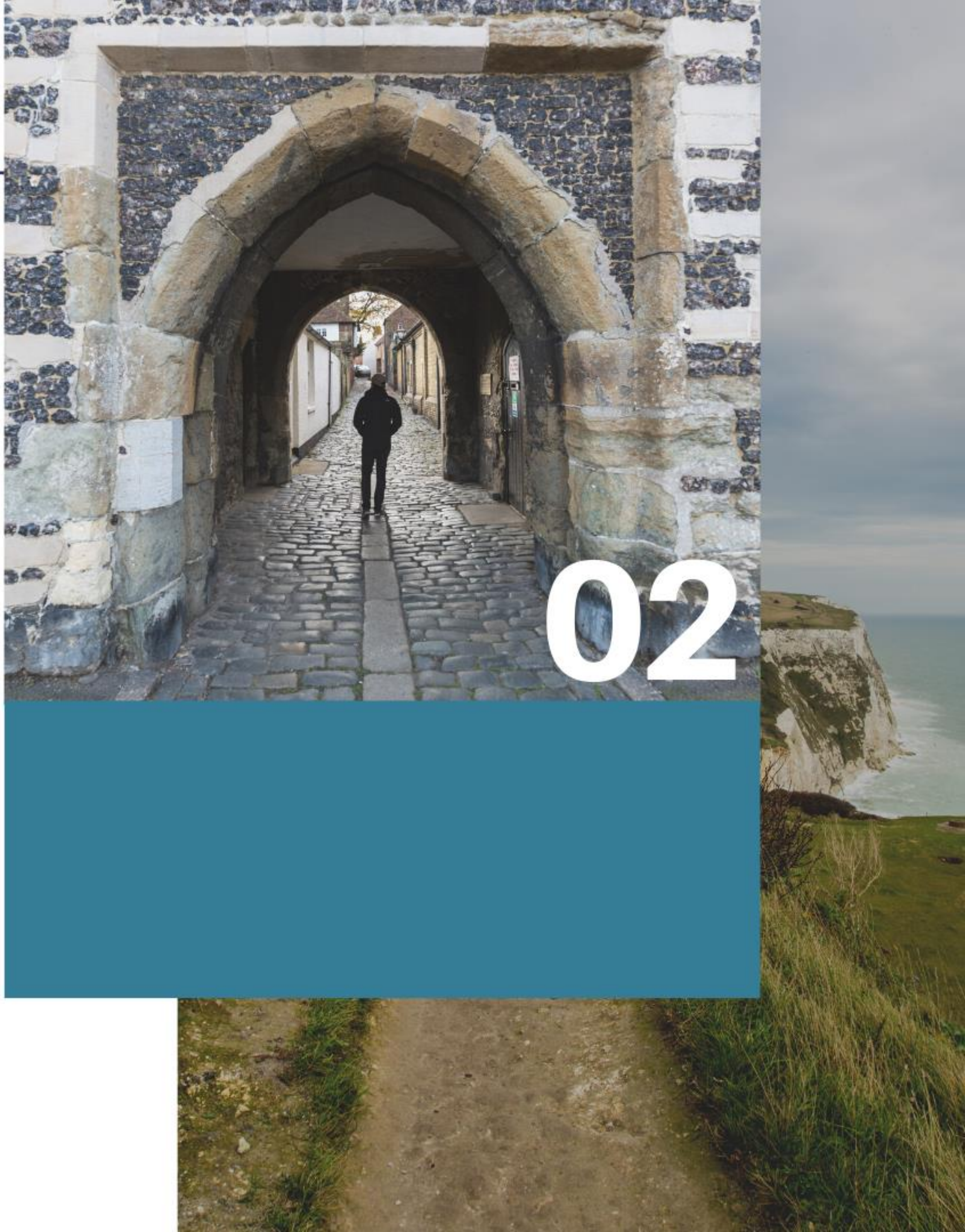
To gain further insight into thoughts and perceptions around public transport, businesses were asked if they had any additional comments. And similar to previous open-ended questions data was analysed by sorting comments into common themes.

- Lack of availability and reliability - Businesses stated that transport services are not always reliable and that certain areas are better serviced compared to others.
- Additional routes and frequency needed - A number of businesses raised the issue that more regular services are needed, particularly to more rural areas.
- Consumer barriers - Businesses also cited that there are various barriers around ease and location of walking routes for consumers and that guidance is needed to help navigate this perhaps through use of maps, sharing walking times, waymarking and better signage.
- Including transport links in offering - Several businesses mentioned that in order to ease accessibility for consumers they incorporate transport links and locations within their offering, for example starting tours and walking breaks that begin from a public transport location.
- Partnerships and integration with transport providers- Businesses also raised the need for increased integration and collaboration between train and bus providers, alongside operators potentially offering incentives or lower fares for certain times or routes.



BUSINESS NEEDS SURVEY FINDINGS:

EAST KENT REGION



Sample

These sub-sections look to examine survey findings in the context of each Kent sub-region, to help inform training and business needs on a more geographical level as part of the project. This also aligns with the Visit Kent Visitor First Strategy, which looks to promote areas of Kent that make sense in the mind of the consumer and link more popular sites with lesser known places to help disperse footfall and increase length of stay. Data was segmented and analysed for those businesses that are located in the districts of East Kent, which include- Canterbury, Dover, Folkestone and Hythe and Thanet, with a total sample of 39 businesses.

Looking at responses by type of business, to which respondents were asked to tick all that applied, the largest proportion of businesses stated they offered accommodation with **49%**, followed by those selecting events venue/organiser **(31%).** In addition to this, activity providers, food and drink providers and activity providers were all selected by **28%** of respondents. The survey then looked to establish how many employees businesses had, including any full or part-time staff and those on furlough. Results show that the majority of businesses that completed the survey **(69%)** have between 0-10 employees, followed by **13%** who stated they have between 11-50 employees.

Businesses by type of Venue

Outdoor- 18%

Indoor- 41%

Mixed- 41%

Are you within the Kent Downs AONB?

Yes- 39%

No- 41%

Don't' know- 21%

Are you within 3 miles of the North Downs Way National Trail?

Yes- 39%

No-39%

Don't' know- 23%

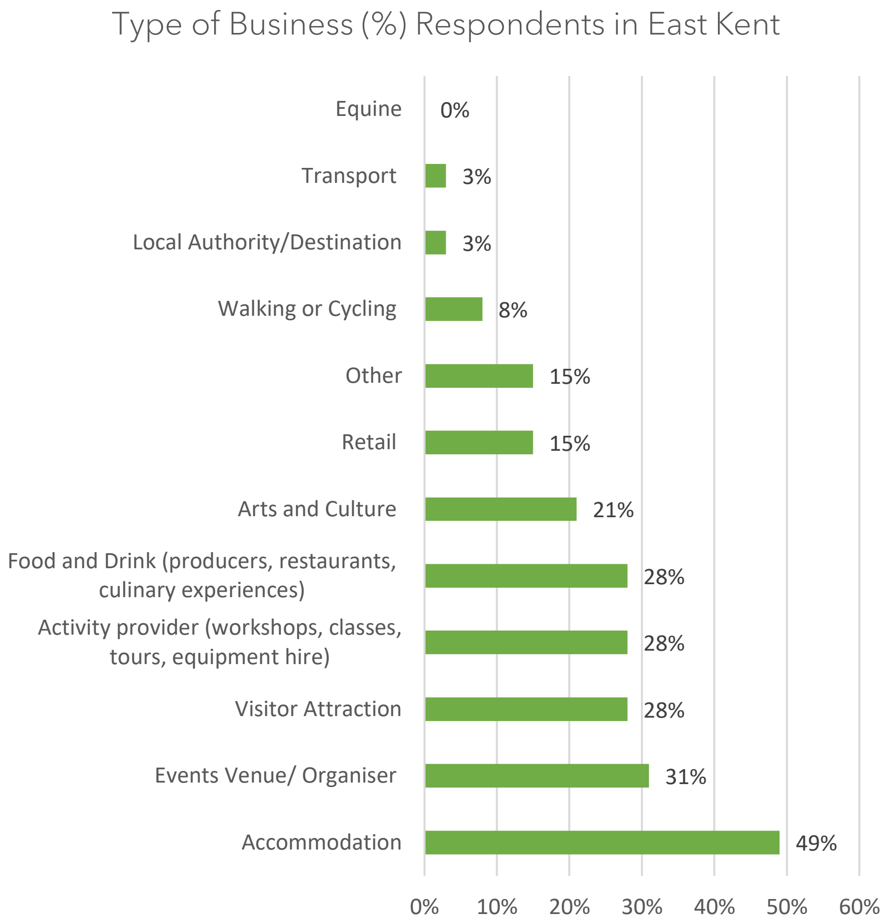


Figure 14: Graph showing % of East Kent businesses that selected the above types of business

Key Markets and Travel Trade Activity

The survey then looked to identify businesses' top target markets prior to COVID-19, alongside their engagement with working with the travel trade. As shown below, the top three markets for businesses in the East Kent region were, South East **(54%)**, Local/county **(51%)** and the wider domestic market **(46%)**. These were then followed by attracting visitors from European markets **(41%)** London and Groups **(both 31%)**. These findings indicate the South East market is slightly more important to this region compared to Kent wide results, alongside the wider domestic market **(10%** higher than Kent findings) as opposed to London visitors specifically. But overall, both international and domestic markets were of focus prior to COVID-19.

Businesses were also asked to what degree they work with the travel trade, with findings showing that the majority of businesses **(69%)** do to some capacity, although **31%** stated they did not work with the trade at all. When comparing these results with all businesses, the level of trade activity is higher for the East Kent region, illustrating perhaps the regions strong links with these organisations, which will be important to reengage and welcome back international visitors and groups.

1 South East

2 Local/County

3 Wider Domestic

Key markets prior to COVID-19 (%) Respondents in East Kent

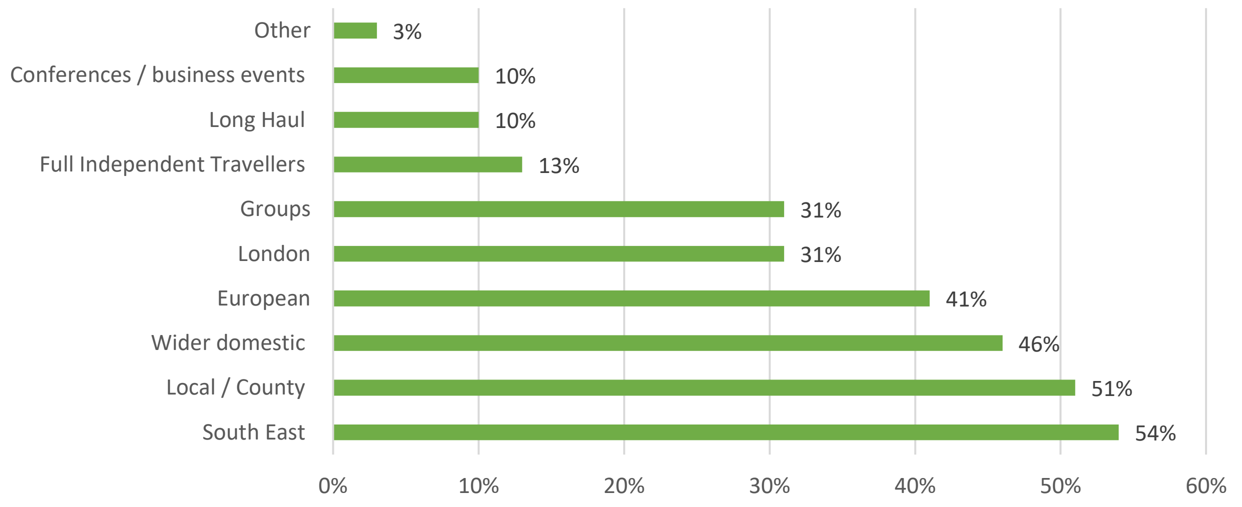


Figure 15: Graph showing % of businesses in East Kent that selected the above as being in their top three markets prior to COVID-19

Do you work with the Travel Trade? (%) Respondents in East Kent

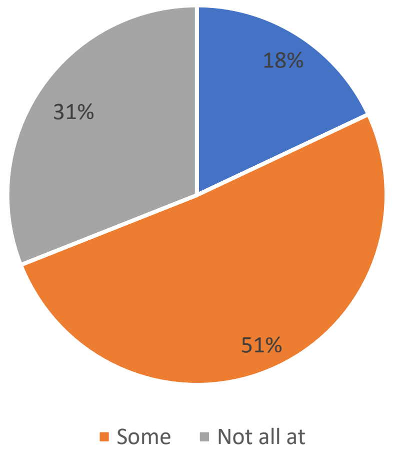


Figure 16: Graph showing % of businesses in East Kent and the frequency to which they work with the travel trade

Support and Training Programmes

Training Programme Insights

Types of Training and Format

Looking to types of training programmes and preferred format, the top ten programmes selected by those based in the East Kent region remained fairly consistent with results for Kent businesses overall. However, differences included businesses ranking working with the travel trade higher than Kent businesses overall, with this programme being in 10th place. Alongside this, training to create a unique selling proposition also ranked higher than Kent wide results, illustrating that these two areas may offer more to businesses in this region. In addition to this, the majority of programmes were requested at an intermediate level, with both photography and digital and online marketing also being requested partially at an expert level. This shows that businesses in this region are already fairly advanced in many of these areas but wish to advance further.

And then when it came to format, findings were consistent again with Kent results, with the top three including, online, instructor-led training and coaching or mentoring.

1 Online training 69%

2 Instructor-led training 69%

3 Coaching or mentoring 54%

Type of training programme	None	Basic	Intermediate	Expert	Total- all levels	Recommended level (s)
Capitalise on local and regional events	15%	36%	41%	8%	85%	Basic/Intermediate
Digital and online marketing	21%	5%	49%	26%	80%	Intermediate/Expert
Create virtual content	23%	8%	49%	21%	78%	Intermediate
Upsell and increase return visits	28%	15%	39%	18%	72%	Intermediate
Adapt our business model to new trend	28%	23%	33%	15%	71%	Intermediate
Design new packages in collaboration with other businesses	31%	18%	39%	13%	70%	Intermediate
Photography	33%	18%	28%	21%	67%	Intermediate/Expert
Co-produce marketing messages with destination management organisation	33%	28%	31%	8%	67%	Basic/Intermediate
Learn experiential marketing techniques	33%	21%	28%	18%	67%	Intermediate/Expert
Work with the Travel Trade	33%	23%	28%	15%	66%	Basic/Intermediate

Seasonality

Looking at findings around seasonality, when asked about interest in developing their out of season experience offering, **82%** of East Kent businesses stated that they would be interested in doing this, followed by **10%** that stated 'no' and **8%** stated they had not thought about it. This is consistent with interest expressed by businesses in Kent overall, demonstrating a high level of interest and recognition of the benefits this could bring.

And when looking at the average percentage of business in a typical year, East Kent saw a similar distribution across each of the four seasons, which the largest proportion of business taking place during the summer months. Finally, in terms of working to adapt, when asked what barriers they felt there were to change, East Kent businesses selected the same top three as Kent wide businesses, although requiring knowledge of new products ranked higher (**39%** vs. **29%** for all businesses). Furthermore, this presents the need to better the region's knowledge of the product offering and potential opportunities this could bring.

Spring	Summer	Autumn	Winter
22%	45%	21%	15%

82%
of East Kent businesses are interested in developing their out of season offering

Partnerships and Collaboration

To help further advance and inform the development of out of season experiential products, responses regarding interest in potential partnerships were also analysed by those businesses based in the East Kent region.

Looking at the top five responses for this question, findings were similar to Kent overall, however interest in developing a new product in partnership with artists and musicians ranked more highly being in 5th place. This could be a reflection of the regions arts and cultural offering and assets including Folkstone's Creative Quarter and Turner Contemporary in Margate, alongside Discover England Fund's England's Creative Coast activity. Overall, this presents viable opportunities for partnership working and creation of experience-led products, including outdoor activities and working with local producers and artists.

Interest from businesses in these areas also supports opportunities raised in the Kent Options Analysis around utilising the countryside and access to the North Downs Way by offering activities around walking, in addition to coastline, and bookable seafood and foraging experiences with local producers.

Which of the following partners would you be interested in developing a new product in partnership with?	%
Outdoor activity providers (Walking, cycling, equine Tourism…)	56%
Businesses operating in the hospitality field	54%
Community groups	51%
Local producers	46%
Artists and musicians	44%

Transport

Looking at transport and connectivity, **74%** of East Kent businesses stated that there was a public footpath linking their businesses to the nearest bus stop or train station, with **21%** specifying there was not and the remaining **5%** were unsure.

Looking at these figures in comparison to Kent businesses overall and within each of the three different regions, East Kent businesses that completed the survey were most likely to be linked to a train or bus station via a public footpath. Similarly, **74%** of businesses in the region stated they felt they are sufficiently serviced by public transport.

Overall, in terms of general accessibility and connectivity, East Kent is fairly well connected, particularly via train links to larger towns and coastal areas.

Is there a public footpath linking your business to the nearest bus stop or train station?

Yes- 74%

No- 21%

Don't know- 5%

Are you sufficiently serviced by public transport?

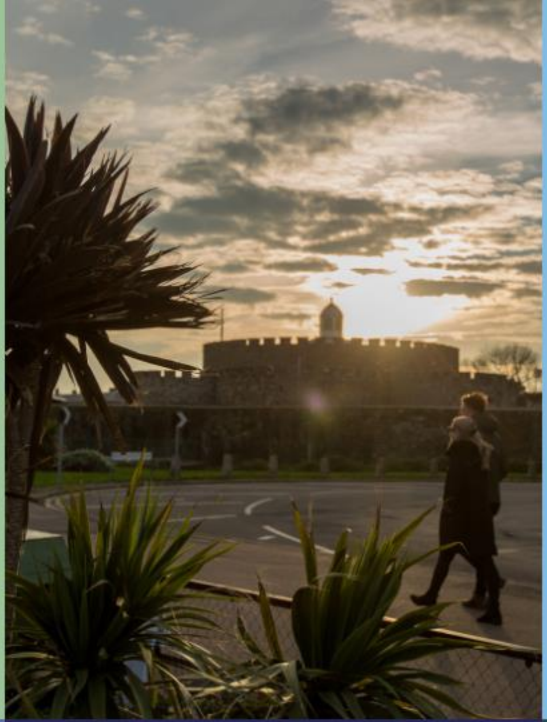
Yes- 74%

No- 26%

Key Findings & Recommendations: East Kent

South East and wider domestic markets were ranked higher by businesses in the East Kent region compared to Kent wide findings, with less of a focus on the London market and more towards European visitors. This was also supported by a strong level of travel trade engagement compared to Kent overall. Although, less focus on the London market could be due to that fact the region already receives a good level of visitors from the capital already.

Awareness of proximity to the North Downs Way could be improved, with 4 out of the 6 businesses that selected they 'did not know' that were in fact within three miles of the trail, were situated in East Kent.



The top ten selected training programmes were similar to Kent overall, with the inclusion of training on working with the travel trade. This perhaps indicates business recognition of its value and appeal of the product offering the region has to this market and their desire to advance their knowledge further.

East Kent businesses displayed a higher level of knowledge around digital and online marketing and photography- These could therefore be delivered at a higher intermediate/expert level.

Requiring knowledge of new products ranked higher for East Kent businesses in terms of being a barrier to change- This presents an opportunity to increase business awareness of the region's product opportunities.

Opportunities for partnership working included outdoor activity providers, local producers, and artists & musicians. This supports some of the experience-led opportunities highlighted in the Kent Options Analysis report such as, countryside and coastline activities and bookable and foraging experiences.

East Kent was the most well-connected region in terms of responses regarding public transport and proximity to public footpaths - therefore this strength should be utilised fully where possible.

BUSINESS NEEDS SURVEY FINDINGS:

WEST KENT REGION

03

Sample

Data was also segmented and analysed for those businesses that are located in the districts of West Kent, which included- Sevenoaks, Tunbridge Wells, Tonbridge & Malling, Maidstone and Ashford, with a total sample of 17 businesses.

Looking at responses on type of business, to which respondents were asked to tick all that applied, the largest proportion of businesses stated they offered accommodation with **47%**, followed by those selecting food and drink **(41%).** In addition to this, activity providers were selected by **35%** of businesses and visitor attractions and retail were both selected by **29%** of respondents.

The survey then looked to establish how many employees businesses had, including any full or part-time staff and those on furlough. Results show that the majority of businesses that completed the survey **(71%)** have between 0-10 employees, followed by **24%** who stated they have between 11-50 employees.

Businesses by type of Venue

Outdoor- 12%

Indoor- 29%

Mixed- 59%

Are you within the Kent Downs AONB?

Yes- 53%

No- 35%

Don't' know- 12%

Are you within 3 miles of the North Downs Way National Trail?

Yes- 35%

No-47%

Don't' know- 18%

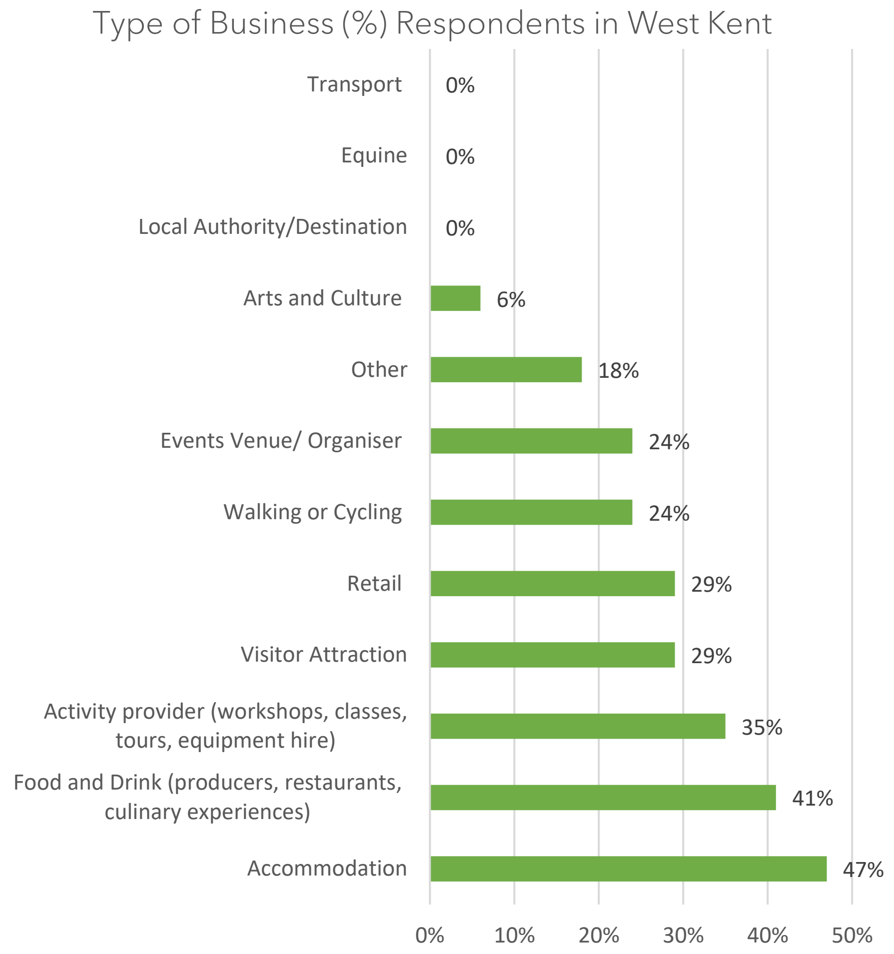


Figure 17: Graph showing % of West Kent businesses that selected the above types of business

Key Markets and Travel Trade Activity

In terms of top target markets prior to COVID-19, as shown below, the top three markets for businesses in the West Kent region were, local/county **(65%)**, London **(65%)** and the South East **(46%)**. This was then followed by attracting visitors from the wider domestic market. These findings, although fairly similar to Kent as a whole, indicate that London is a more important market to this region (**19%** higher than Kent findings).

When asked about travel trade activity, **47%** of businesses in West Kent stated they had worked with the travel trade in some capacity, although **53%** stated they had not. When comparing these results with Kent wide and East Kent businesses, the level of trade activity was lower. These findings perhaps indicate that these smaller businesses could benefit from increased trade connections.

1 Local/County

2 London

3 South East

Key markets prior to COVID-19 (%) respondents in West Kent

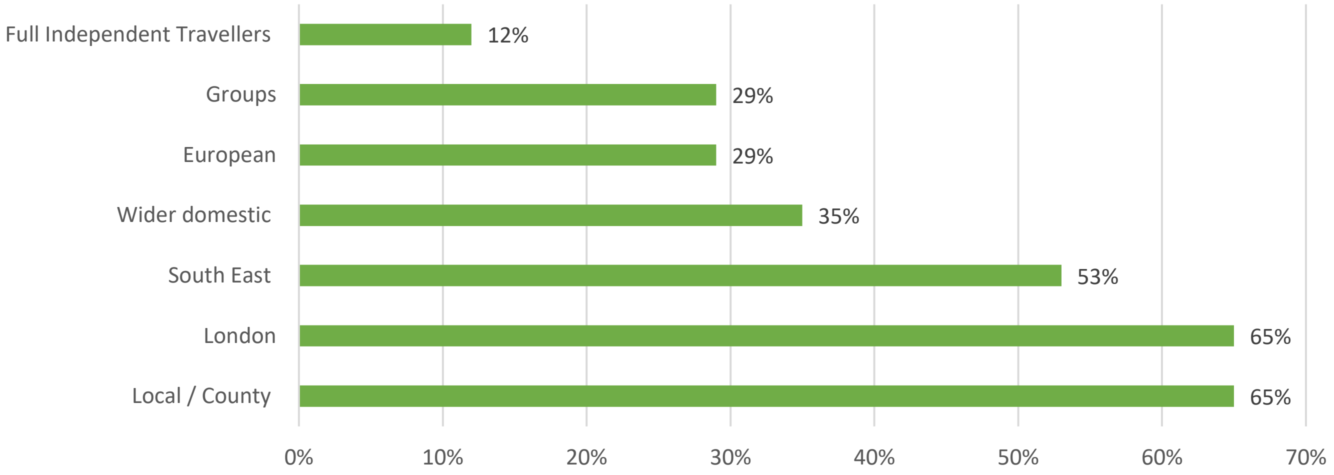


Figure 18: Graph showing % of businesses in West Kent that selected the above as being in their top three markets prior to COVID-19

Do you work with the Travel Trade? (%) Respondents in West Kent

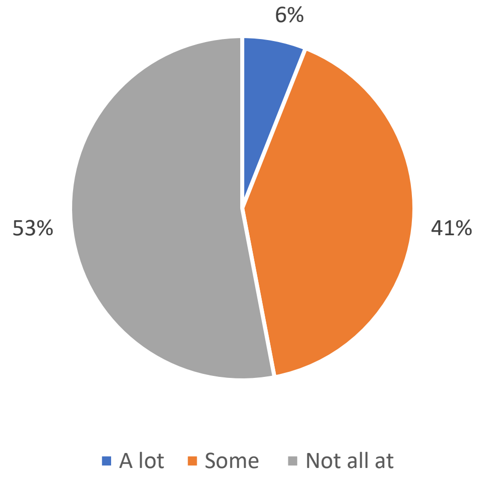


Figure 19: Graph showing % of businesses in West Kent and the frequency to which they work with the travel trade

Support and Training Programmes

Types of Training and Format

Looking to types of training programmes, the top ten programmes selected by those based in West Kent remained consistent in many areas compared to Kent businesses overall. However, differences included a higher percentage of businesses selecting learning about experiential marketing techniques (**94%** vs. **82%**) and creating storytelling around products and services (**88%** vs. **68%**), being in 1st and 2nd place. Alongside this, West Kent businesses expressed a high level of interest in training around understanding the wider destination in terms of its landscape, heritage and wildlife, compared to Kent overall and was the only region to have this programme in their top ten.

Training around sustainability and accessibility also ranked higher than Kent wide results, illustrating that these areas alongside how to use the wider landscape and nature are of particular interest to businesses in this region of the county. And looking at the level of delivery, the majority were preferred at a basic or intermediate level. When it came to training format, findings show that online training emerged as the most popular format overall **(71%)**, followed by group discussion and activities **(65%)** and instructor-led training **(59%)**. Findings show that businesses in the West Kent region preferred more open group discussions compared to the overall findings and those based in East Kent.

Training Programme Insights

1 Online training 71%

2 Group discussion & Activities 65%

3 Instructor-led training 59%

Type of training programme	None	Basic	Intermediate	Expert	Total- all levels	Recommended level (s)
Learn experiential marketing techniques	6%	41%	18%	35%	94%	Basic
Create storytelling around products and services	12%	47%	29%	12%	88%	Basic
Digital and online marketing	18%	18%	41%	24%	83%	Intermediate
Improve sustainable practices	18%	41%	29%	12%	82%	Basic/Intermediate
Upsell and increase return visits	18%	29%	18%	35%	82%	Basic/Expert
Understand the wider destination – landscape, heritage, wildlife	24%	18%	41%	18%	77%	Intermediate
Create a unique selling proposition	24%	6%	59%	12%	77%	Intermediate
Understand the needs of different visitors including accessibility needs	24%	41%	24%	12%	77%	Basic/Intermediate
Capitalise on local and regional events	24%	29%	41%	6%	76%	Basic/Intermediate
Welcoming international visitors	24%	35%	29%	12%	76%	Basic/Intermediate

Seasonality

Looking at findings around seasonality, when asked about interest in developing their out of season experience offering, 88% of West Kent businesses stated that they would be interested in developing this, with the remaining 12% selecting 'no'. This is consistent with interest expressed by businesses in Kent overall, demonstrating a high level of interest and recognition of the benefits this could bring.

And when looking at the average percentage of business in a typical year, West Kent saw a similar distribution across each of the four seasons, although the proportion of business in the summer months was slightly higher compared to the average for businesses overall. Finally, in terms of working to adapt, when asked what barriers they felt there were to change, West Kent businesses selected the same top two as Kent wide findings, although 'I am comfortable with my practices' came third overall for this group.

Spring	Summer	Autumn	Winter
20%	49%	21%	12%

88%
of West Kent businesses are interested in developing their out of season offering

Partnerships and Collaboration

Responses regarding interest in potential partnerships were also analysed by those businesses based in the West Kent region. Results show that working with local producers came out as the the top selected partnership, with **53%** selecting this compared to **46%** for Kent businesses overall.

Other differences included the addition of Artisans and crafters in West Kent's top five, selected by **47%** of businesses, compared to **36%** for businesses overall. However, partnership opportunities with outdoor activity providers, community groups and environmental/nature activities also ranked highly.

Interest in these partnerships, may reflect the region's strong rural countryside offering, and the opportunity to develop particular activities around this. Strong interest in partners with local producers and artisans also supports opportunities outlined in the Kent Options Analysis, which highlighted the strength of local producers and vineyards.

Which of the following partners would you be interested in developing a new product in partnership with?	%
Local producers	53%
Outdoor activity providers (Walking, cycling, equine Tourism	47%
Community groups	47%
Artisans and crafters	47%
Environmental and Nature Activities / Education	41%

Transport

Looking at transport and connectivity, **47%** of West Kent businesses stated that there was a public footpath linking their businesses to the nearest bus stop or train station, although **53%** stated that there was not. And when asked if they felt sufficiently serviced by public transport, only **29%** felt they were.

Findings therefore show that overall, West Kent businesses that completed the survey felt the least connected to public transport out of the three regions in the county. In terms of the region itself, areas such as Ashford are better connected, benefiting from both international connections and HS1 services from London, which also supports London being a key market in West Kent. However, the region does also consist of larger more rural areas that aren't as connected, which was also highlighted in the Kent wide findings where businesses raised issues surrounding barriers that rural businesses have. These findings show that this is an area which needs focus in this region, to utilise and work with transport operators to better transport services or develop products that include transport links.

Is there a public footpath linking your business to the nearest bus stop or train station?

Yes- 47%

No- 53%

Are you sufficiently serviced by public transport?

Yes- 29%

No- 71%

West Kent businesses that completed the survey felt the least connected to public transport

Key Findings & Recommendations: West Kent

The London market was a key market for this region compared to Kent wide findings. Although travel trade activity was lower compared to Kent, presenting an opportunity to increase this to attract more international groups.

Training around sustainability and accessibility ranked higher than Kent wide results, alongside understanding the wider landscape, heritage and nature.

Businesses in West Kent preferred more open group discussions compared to Kent wide findings and those in East Kent.

The percentage of business in the summer months was slightly higher for West Kent compared to the average for businesses overall, showing the reliance on the summer months and the need to perhaps distribute visitors further into the shoulder months.

Partnerships with local producers and artisans emerged as strong partnership opportunities, supporting recommendations raised in the Kent Options Analysis around utilising the regions strong local produce and vineyard offering.

Businesses that completed the survey in West Kent felt the least connected via transport out of the three regions, highlighting the need to better transport providers in this area, by working with operators to better services and consumer accessibility.

BUSINESS NEEDS SURVEY FINDINGS:

NORTH KENT REGION

04

Sample

Data was also segmented and analysed for those businesses that were located in the districts of North Kent, which included Gravesham, Swale, Dartford and Medway, with a total sample of 12 businesses.

Looking at responses on type of business, respondents were asked to tick all that applied. The largest proportion of businesses stated they were a visitor attraction with 58%, followed by activity providers (33%). In addition to this, events venue/organisers were selected by 33% of businesses and food and drink was selected by 25% of respondents.

The survey then looked to establish how many employees businesses had, including any full or part-time staff and those on furlough. Results show that the largest proportion of businesses that completed the survey (42%) have between 0-10 employees, followed by 25% who specified an actual number of employees, which showed an average of one member of staff. Findings also show that only a small number of North Kent businesses were within the Kent Downs AONB or within three miles of the North Downs Way.

Businesses by type of Venue

Outdoor- 8%

Indoor- 33%

Mixed- 58%

Are you within the Kent Downs AONB?

Yes- 8%

No- 75%

Don't' know- 17%

Are you within 3 miles of the North Downs Way National Trail?

Yes- 17%

No-67%

Don't' know- 17%

Type of Business (%) Respondents in North Kent

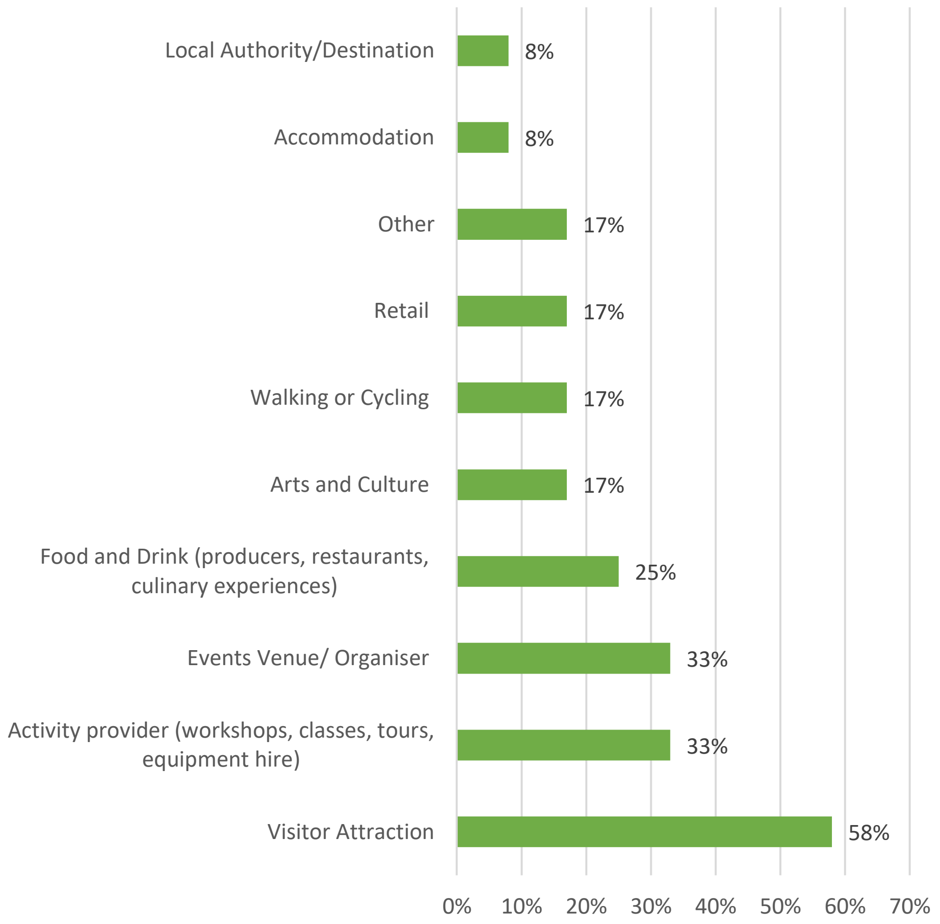


Figure 20: Graph showing % of North Kent businesses that selected the above types of business

Key Markets and Travel Trade Activity

In terms of top target markets prior to COVID-19, as shown below, the top three markets for businesses in the North Kent region were local/county **(92%)**, the South East **(75%)** and London **(46%)**. This was then followed by Groups **(17%)**. These findings, although fairly similar to Kent as a whole, indicate that the local and county markets in particular are essential to businesses in North Kent that completed the survey, alongside visitors from home counties. However, the percentage of businesses that selected overseas markets, including European and long-haul were lower overall than other regions.

When asked about travel trade activity, **58%** of businesses in North Kent stated they had not worked with the trade previously. When comparing these results with Kent wide findings and those from other regions, the level of trade activity was the lowest for this group of businesses, indicating that these smaller businesses could benefit from increased trade connections and product that appeals to the overseas market.

1 Local/County

2 South East

3 London

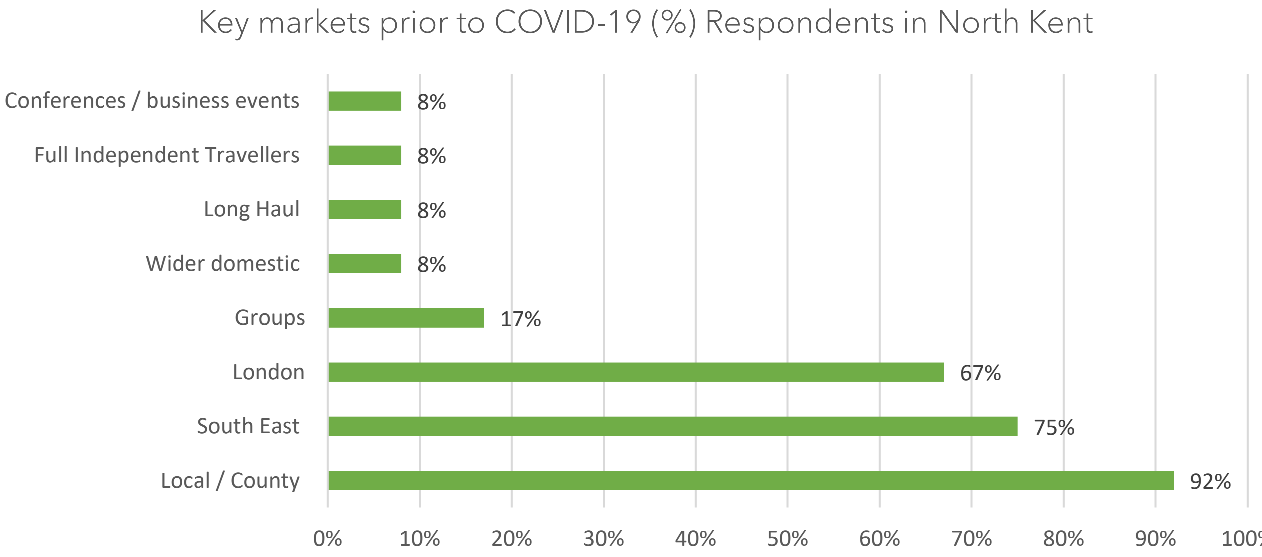


Figure 21: Graph showing % of businesses in North Kent that selected the above as being in their top three markets prior to COVID-19

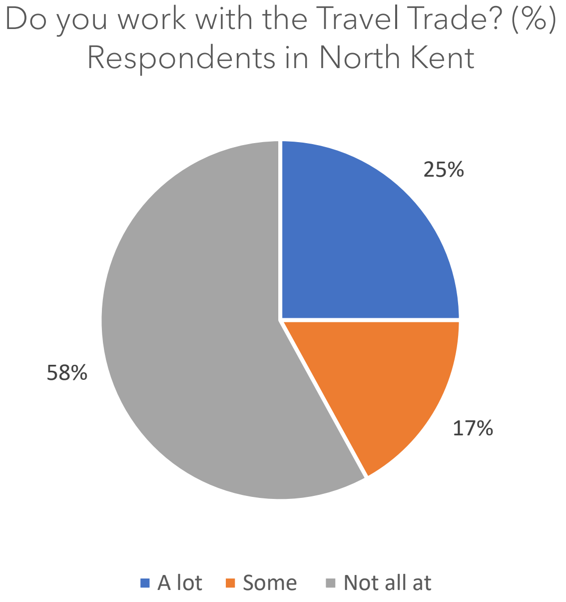


Figure 22: Graph showing % of businesses in North Kent and the frequency to which they work with the travel trade

Support and Training Programmes

Training Programme Insights

Types of Training and Format

Looking to types of training programmes and preferred format, the top ten programmes selected by those based in the North Kent region remained fairly consistent with results for Kent businesses overall.

Although, training programmes around welcoming international visitors and working with the travel trade were selected by a larger proportion of businesses in North Kent compared to Kent wide figures. This perhaps indicates that these training programmes will be particularly useful to businesses in this region, particularly as current trade engagement is lower than other regions. Findings also show that the majority of training programmes should be delivered on a basic/intermediate level, with the exception of experiential marketing techniques at a intermediate/expert level.

And in terms of format of delivery, findings differed slightly compared to Kent as a whole, with North Kent businesses displaying a preference towards group discussions and peer-to-peer formats, as opposed to online training.

1 Instructor-led training 75%

2 Coaching or mentoring 67%

3 Group discussions & Peer-to-peer both 50%

Type of training programme	None	Basic	Intermediate	Expert	Total- all levels	Recommended level (s)
Upsell and increase return visits	8%	25%	58%	8%	91%	Intermediate
Welcoming international visitors	17%	42%	42%	0%	84%	Basic/Intermediate
Design new packages in collaboration with other businesses	17%	33%	33%	17%	83%	Basic/Intermediate
Adapt our business model to new trend	17%	42%	33%	8%	83%	Basic/Intermediate
Digital and online marketing	17%	8%	58%	17%	83%	Intermediate
Capitalise on local and regional events	17%	25%	50%	8%	83%	Intermediate
Create virtual content	25%	33%	25%	17%	75%	Basic/Intermediate
Work with the Travel Trade	25%	33%	17%	25%	75%	Basis
Photography	25%	33%	42%	0%	75%	Basic/Intermediate
Learn experiential marketing techniques	25%	17%	33%	25%	75%	Intermediate/Expert
Co-produce marketing messages with destination management organisation	25%	25%	25%	25%	75%	All levels

Seasonality and Additional Services

Looking at findings around seasonality, when asked about interest in developing their out of season experience offering, **82%** of North Kent businesses stated that they would be interested in developing this, with the remaining **18%** stating they 'had not thought about it.' This is consistent with interest expressed by businesses in Kent overall, demonstrating a high of level of interest and recognition of the benefits this could bring.

And when looking at the average percentage of business in a typical year, North Kent saw a similar distribution across each of the four seasons, although the proportion of business in the summer months was slightly lower compared to the average for businesses overall and compared to each of the other regions, showing the region's appeal in the shoulder seasons.

Spring	Summer	Autumn	Winter
24%	35%	23%	19%

82% of North Kent businesses are interested in developing their out of season offering

Partnerships and Collaboration

Looking to potential partnerships to develop new products, the largest proportion of businesses selected transport providers **(73%)**, followed by event planners **(64%)** and community groups **(56%)**. When comparing these findings with Kent wide results, the proportion of businesses selecting both transport providers and event planners was considerably higher, illustrating desire to utilise these areas to develop their offering further. Other differences to the Kent wide results was the inclusion of artists and musicians **(46%)**, being in the top five selected answers.

Some of these areas of development are also mirrored in the Kent Options Analysis, which looks at the opportunity to utilise events and festivals in the region, alongside incorporating cultural and literacy links within experience led products and tours. Alongside these elements, it also looks at the potential to further develop local produce led bookable experiences.

Which of the following partners would you be interested in developing a new product in partnership with?	%
Transport providers	73%
Event planners	64%
Community groups	55%
Outdoor activity providers (Walking, cycling, equine Tourism	46%
Artists and musicians	46%
Local producers	46%

Transport

Looking at transport and connectivity, **55%** of North Kent businesses stated that there was a public footpath linking their businesses to the nearest bus stop or train station. This shows that overall the majority of businesses could utilise this to help inform visitors on how to reach them via public transport. However, findings for this question also show that **27%** of businesses were unsure, the highest percentage out of the three regions within the county. This shows that perhaps there is a need to increase businesses awareness around nearby public footpaths to assist further with visitor connectivity.

And when asked if they felt sufficiently serviced by public transport, only **55%** felt they were, with the remaining **46%** stating that they were not, indicating that even though a large proportion are satisfied, a substantial proportion feel they are not well connected. Overall, North Kent businesses felt fairly connected to public transport links, although results were below those of Kent wide and East Kent findings. Larger towns such as Rochester and Faversham are more connected via HS1, but similarly with West Kent, the region also consists of more rural areas that aren't as connected, which again was highlighted in wider findings where businesses cited issues surrounding the barriers rural destinations have with accessibility and connectivity.

Is there a public footpath linking your business to the nearest bus stop or train station?

Yes- 55%

No- 18%

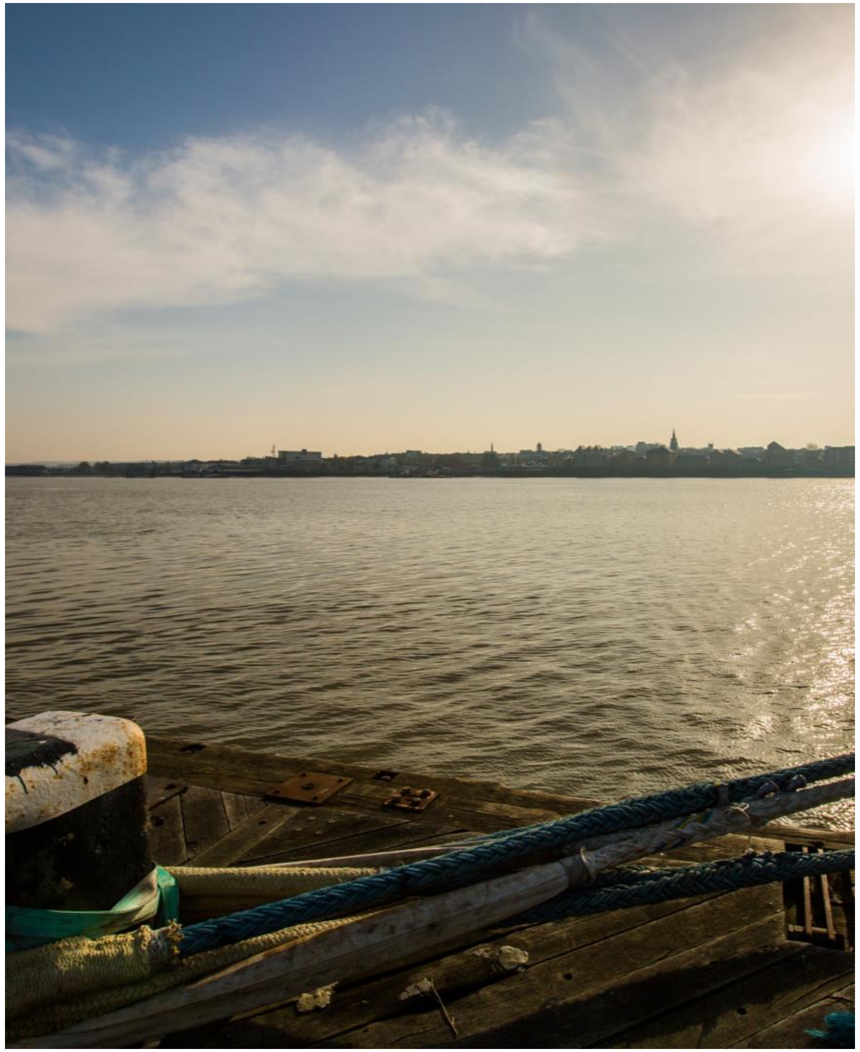
Don't Know- 27%

Are you sufficiently serviced by public transport?

Yes- 55%

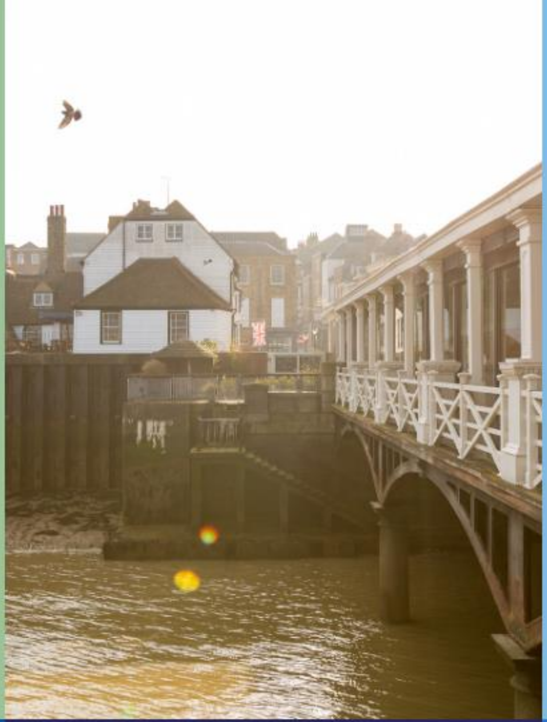
No- 46%

27% of businesses were unsure if there was a public footpath, the highest percentage out of the three regions



Key Findings & Recommendations: North Kent

Local markets were key for this region, with overseas markets only being selected by a small number of businesses. Travel trade activity was also the lowest out of the three regions, perhaps illustrating the need to increase trade connections and develop group friendly experiences that appeal to the overseas markets.



Businesses favoured training around working with the travel trade compared to Kent wide findings, showing again the need to increase businesses knowledge in this area.

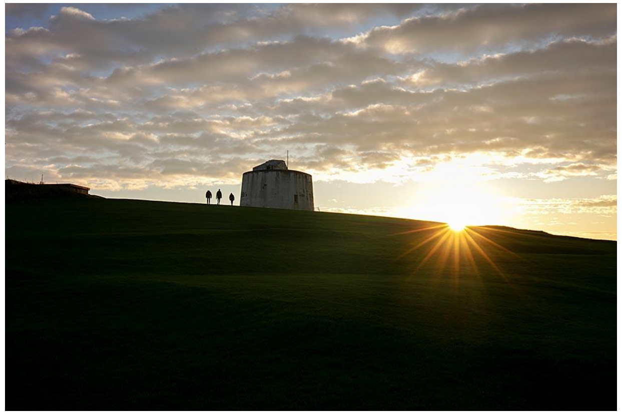
Although businesses that completed the survey in North Kent felt fairly well connected with public transport, there was still a considerable proportion who did not. Alongside this, North Kent had the highest uncertainty around proximity to public footpaths. This indicates that awareness around this could be explored, alongside working with businesses on last mile activity.

North Kent businesses displayed a preference towards more one-on-one and group discussions when it came to delivering training, as opposed to more online.

Potential partnerships to develop new products differed to Kent with the inclusion of both transport providers, event planners and artists and musicians. For events and cultural partnerships in particular, this supports opportunities outlined in the Kent Options Analysis around utilising events and festivals and incorporating the region’s strong cultural and literacy links to create experience-led tours and bookable products.

Summary and Recommendations: Kent Wide Findings

The findings from this research certainly offer an insight into the needs of tourism businesses in terms of the types of training programmes they feel they would benefit from, along with other support needed, particularly post-COVID. Overall, findings also show great support of the wider projects aims and objectives and specifically business willingness and awareness of the benefits of product diversification and out of season product development. This section of the report looks to outline key takeaways and recommendations.



Awareness of proximity to The AONB and The North Downs Way Trail- Overall, businesses displayed a higher level of awareness in relation to their proximity to The Kent Downs AONB, whereas some businesses that were within 3 miles of the North Downs Way National Trail did not perceive themselves to be. Furthermore, perhaps the AONB has a stronger brand in the mind of businesses and that businesses' awareness and their distance from The North Downs Way could be built upon.

Key markets and travel trade activity- Key markets prior to COVID-19 included the local area, the South East and the London market, showing the importance and value of these markets to Kent businesses. However, post-COVID-19 the domestic market may take even greater precedence given the growth in staycations and uncertainty around international travel and quarantine periods. Although, businesses will also want to focus on attracting and welcoming international visitors when it is safe to do so, from near European markets and groups. Furthermore, in order to achieve this, increasing some businesses engagement with trade organisations will be advantageous and ensuring products and experiences can be packaged that appeal to the trade and group market.

Trade appeal- Businesses that had some of the lowest levels of engagement with the travel trade included, arts and culture, activity providers, walking and cycling and retail. In addition, businesses based in The Kent Downs AONB had a lower level of trade engagement than those that were not situated in the area. Therefore, to expand their reach to the international and groups market, guidance could be given to businesses in these areas to aid with this. Linking to the findings of the Kent Options Analysis, product hooks such as heritage can be used alongside other experiences to attract the overseas market and that when the travel sector resumes the industry will be looking for experience-led products to partner with, to reengage and welcome back the groups market.

Outdoor pursuits and the London market- When looking at key markets and type of business, businesses that offered activities and walking and cycling ranked London more highly as a key market compared to the Kent wide results. This shows the appeal of these activities to the London market, allowing visitors to escape the city for more open spaces and outdoor leisure activities. Using this appeal to develop experience-led packages involving activities alongside accommodation for example can extend their length of stay and spend within the county.

Digital and marketing-based support and content creation- As highlighted previously in the report, the use of technology and virtual platforms has seen major growth due to the COVID-19 pandemic and it is vital that businesses keep up with the latest trends and advancements in this area. In particular, businesses need to ensure that they are communicating with their consumers in the right way and through the right channels by using knowledge-led and targeted marketing campaigns. Needs around types of training programmes certainly support this, with the top ten programmes including, digital and online marketing, experiential marketing techniques, creation of virtual content, storytelling about products and photography. Businesses also raised the need for further support with video creation, website improvements and assistance with understanding IT and online platform options. Learning about technology was also cited as one of the main barriers to change following COVID-19.

Adaptation and Collaboration- The majority of the other training programmes selected further supports the need for adapting and developing product offering. Businesses favoured training about collaboration with other businesses and co-producing messages with DMO'S, both of which support national level recovery guidelines and project aims around the importance of building partnerships and working with other organisations to create a joint voice and message for the destination.

Upselling, increasing return visits and events- The top training programme selected by businesses centred on learning how to capitalise on local and regional events - illustrating the large appeal and potential opportunities the events market holds and should therefore should be an area of focus, together with training on working to upsell and increase return visits.

Online and expertise-led formats – When it came to training format the preferred options included online and instructor-led or coaching sessions. This shows a preference towards more expertise-led training and online, with the latter perhaps being prioritised more due to COVID-19.

Level of delivery- Results show that the majority of programmes are ideally to be delivered at a basic or intermediate level, with the exception of learning experiential marketing techniques, which scored fairly similar across all levels. And for upselling and increasing return visits, this was requested at a higher level, with 59% selecting either intermediate or expert.

Instructor-led programmes- This format of training was particularly prominent for delivering both digital and online marketing and creating storytelling around products and services, with perhaps these programmes involving more technical and creative sessions.

Online training- Findings show that online training was the preferred format when it came to delivering training on upselling and increasing return visits, alongside guidance on how to capitalise on local and regional events. Therefore, these areas could be delivered via an online session or webinar, with an easy to follow presentation, showing examples, case studies and an opportunity for questions.

Group discussions and peer-to-peer sessions- When it came to training on co-producing marketing messages with DMO's, group discussions and peer-to-peer activity was favoured in comparison to the other programmes. By using this format of delivery DMO's and businesses can come together to discuss these ideas and examples of effective messaging.

Virtual content case studies- This format ranked most highly for creating virtual content compared to other programmes, therefore when delivering training on this area, examples of case studies could be used allowing businesses to immerse themselves in cases of best practice and take inspiration from these.

Training on sustainable practices- When it came to businesses that ranked training on improving sustainable practices most highly, these included food and drink providers, event venues, visitor attractions and those providing walking and cycling services. Although sustainable practices are an important area for all businesses, these businesses expressed the most interest. Training on this can also touch on trends around food miles, experiencing local produce and sustainable forms of transport that may appeal to these types of businesses in particular.

Training for businesses in The Kent Downs AONB- Comparing training needs between those in the AONB verses those that are not , AONB businesses displayed a higher level of interest in receiving training on the active rural market and to how to offer local tours and guided activities. This firstly shows support of delivering training in these areas, but it also supports experience-led opportunities outlined in the Options Analysis for the AONB and North Downs Way around bookable guided tours and walking and cycling.

Access to funding and improving consumer confidence- Two other areas of support which emerged in the survey and in the Visit Kent COVID-19 Business Impact survey report is the ongoing need for information on accessing latest funding opportunities. Alongside this, businesses expressed the importance of support around being able to effectively communicate with consumers around products and health and safety and the need to rebuild consumer confidence.

Consumer interest in diversification- The majority of businesses stated that their customers also ask for additional services that they do not provide, which does indicate that consumers are looking for businesses to perhaps offer more in certain areas. When asked what types of services this included, common themes included food and drink and access to additional areas and guided tours. These requests show great support of behind the scenes access and private tours of heritage sites outlined in the Kent Options Analysis.

Seasonality- Findings indicated that businesses displayed a significant level of interest in developing out of season products between October- March. This shows support for project activity around developing the tourism offering in the shoulder months, to help increase revenue and business resilience post-COVID-19.

Partnerships and developing new products- Findings showed that there was significant interest from businesses when asked about developing new products in partnership with other types of organisations. Outdoor activity providers, community groups and local producers emerged as the top selected partners. This is also perhaps reflective of the growing trend in visitors wanting to experience authentic and local produce and the benefits of outdoor based activities following COVID-19, on general wellbeing and self-improvement. This interest shows support of a collaborative joined-up destination approach and support other local businesses. It is therefore important to help facilitate these through sharing connections, examples of best practice to allow businesses to diversify and for smaller businesses to benefit from partnerships with larger organisations that may be the initial trigger for visiting.

Transport barriers- The main barriers around public transport were proximity to the nearest bus stop or train station and the frequency of the already available services not being sufficient. Although bus stops where overall nearer, there are considerable barriers to overcome, in particular for those in more rural areas.

Consumer perception and walking barriers- Businesses raised the issue of consumer perceptions and length of walking routes and this could perhaps be helped through digital maps, walking times and increased promotion of using public footpaths that link with businesses. In addition, the use of walking tours and cycling to link up public transport and attractions can help to reduce this gap.

Incorporating transport links into product offering- In order to overcome transport barriers, experience-led products and packages could look to incorporate pick up points from main line transport links or start and end tours and experiences at these locations or nearby.

Working with transport providers- Communication with and between transport providers is key, working on a joined-up approach around messaging and working to increase services and ticket offers to lesser connected destinations.

References

[1] VisitBritain (2020) *2020 Tourism Forecast*

[2] VisitEngland (2020) *COVID-19 Consumer Tracker Wave 19: UK Results*

[3] VisitBritain (2020) *Helping the Tourism Industry Recover from COVID-19*

[4] Visit Kent (2020) *Experience Options Analysis: Mapping the Experiential Product in Kent*

[5] City/Nation/Place (2020) *Using digital data to adapt to a changing travel landscape*

[6] UNWTO (2020) *One Planet Vision for a Responsible Recovery of the Tourism Sector*

[7] OECD (2020) *Rebuilding tourism for the future: COVID-19 policy responses and recovery*

[8] Visit Kent (2020) Visit Kent September Business Barometer

[9] Visit Kent (2020) COVID-19 Business Impact report

BUSINESS NEEDS SURVEY:

Appendices

Appendix 1

Type of training programme	None	Basic	Intermediate	Expert	Total- all levels
Capitalise on local and regional events	17	31	41	10	82
Digital and online marketing	20	9	47	24	80
Upsell and increase return visits	21	20	36	23	79
Create virtual content	24	16	39	21	76
Learn experiential marketing techniques	24	24	26	26	76
Adapt our business model to new trend	27	24	33	16	73
Design new packages in collaboration with other businesses	27	23	31	19	73
Welcoming international visitors	29	31	29	11	71
Co-produce marketing messages with destination management organisation	30	29	26	16	71
Create storytelling around products and services	31	20	34	14	68
Photography	31	21	31	16	68
Work with the Travel Trade	33	24	26	17	67
Create a unique selling proposition	34	10	40	16	66
Understand the wider destination - recommendations and cross selling	36	26	31	7	64
Improve sustainable practices	37	26	27	10	63
Gather and interpret data effectively	37	20	29	14	63
Understand the wider destination – landscape, heritage, wildlife	37	20	31	11	62
Understand the tourism supply and demand	39	23	24	14	61
Diversify activity into tourism	40	23	24	13	60
Testing messages and products	40	23	24	13	60
Understand the needs of different visitors including accessibility needs	41	26	23	10	59
Understand International markets	43	23	21	13	57
How to welcome and attract visitors for the active rural market - cycling, walking, horse-riding	43	16	24	17	57
Improve my basic digital skills	44	19	27	10	56
Customer service and feedback	44	17	24	14	55
Offer local tours or guided activities	49	21	14	16	51
Improve health and safety	51	19	21	9	49
Improving welcome	54	17	26	3	46
Deal with difficult customers	53	14	21	11	46
Manage crisis communication	56	27	16	1	44
Retain staff, increase flexibility, engagement with company values and loyalty	76	14	7	3	24
Managing volunteers	80	7	9	4	20
Other	94	3	1	1	5

Appendix 2

Type of Business	Top three partnership opportunities	%
Accommodation	Outdoor activity providers (Walking, cycling, equine Tourism...)	68%
	Local producers	43%
	Businesses operating in the hospitality field	43%
	Environmental and Nature Activities / Education	43%
Visitor Attractions	Community groups	65%
	Local producers	61%
	Artisans and crafters	57%
	Transport providers	57%
	Artists and musicians	57%
Events	Local producers	71%
	Community groups	62%
	Environmental and Nature Activities / Education	57%
Arts and Culture	Community groups	100%
	Artists and musicians	73%
	Local producers	64%
	Artisans and crafters	64%
	Environmental and Nature Activities / Education	64%
Activity providers	Community groups	86%
	Environmental and Nature Activities / Education	68%
	Local producers	68%
	Spirituality and wellbeing activities	59%
Walking and Cycling	Local producers	73%
	Environmental and Nature Activities / Education	73%
	Businesses operating in the hospitality field	64%
	Outdoor activity providers (Walking, cycling, equine Tourism...)	64%
	Fitness and Health	64%
	Community Groups	64%
Food and Drink providers	Local producers	77%
	Outdoor activity providers (Walking, cycling, equine Tourism	59%
	Community groups	59%
Retail	Community groups	86%
	Local producers	79%
	Environmental and Nature Activities / Education	71%
The Kent Downs AONB	Outdoor activity providers (Walking, cycling, equine Tourism	73%
	Businesses operating in the hospitality field	58%
	Local producers	50%
North Downs Way	Outdoor activity providers (Walking, cycling, equine Tourism	71%
	Community Groups	54%
	Local producers	54%
	Businesses operating in the hospitality field	50%

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