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EXPERIENCE

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VISIT KENT
BUSINESS
GARDEN of ENGLAND

Interreg EXPERIENCE- Analysis and Reporting of Kent Pilot Region: Travel Trade Survey

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Contents

Introduction and Report Overview

This report looks to present findings from a recent survey which aimed to gather insights from domestic and international tour operators and travel trade buyers that work primarily in the leisure and educational sectors, to establish the type of products that are in demand with their clients and what the trade requires in order to work with them.

Using these key findings and recommendations, Visit Kent will work with local authority partners to engage with both tourism and non-traditional tourism businesses and experience providers across the region, to help adapt and diversify their product offering to ensure that there are new, bookable and experiential products all-year round. A key part to this product development will be ensuring they appeal and are suitable for distribution through the travel trade, key trade markets and can be included in future itineraries.

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 drive recovery and 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. The contribution that the project will bring to the local area is vital, including mitigating the impact of increased visitor footfall, and revenue generated will be used to protect and maintain historical and cultural attractions, that are integral to Kent's tourism landscape and product offering.

Given the unprecedented impact and challenges brought about by the COVID-19 pandemic, it is essential that destinations work to support the travel trade to rebuild the overseas and group markets. This activity will help drive the demand for Kent by providing all-important reasons to visit, helping the destination to become more competitive and develop local businesses' out of season offering and travel trade 'readiness'.

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 key markets, popular leisure experiences, rising trends and enquiries post-COVID. Lastly, key takeaways will be summarised and a list of recommendations will be compiled to inform the next steps in this activity.

Understanding the travel trade's needs in order to provide all important reasons to visit

Latest Research and Trends

The impact of the COVID-19 pandemic will have inevitably changed traveller habits and subsequently their behaviour. Many trends prior to the pandemic will have slowed, while others will emerge stronger in the mind of consumers moving forward. Earlier in the year COVID-19 triggered a near total shutdown in overseas travel, and although lockdown was eased during the summer, additional restrictions and lockdowns have been put with place, with international visits seeing substantial decease compared to 2019.[1]

Although forecasting figures at this time is challenging given the rapidly evolving situation, according to VisitBritain's 2020 inbound forecast, they have predicted a 76% decline in international visits and a 80% decrease in visitor spending. This forecast also assumes that the majority of visitors will still face restrictions on arrival and return, and is very much still a short-term forecast, as longer-term recovery will depend of progression of vaccines, wider supply and demand and the ever-evolving economic outlook. [1]

Overall, the travel and tourism industry has been hit hard by the pandemic and as a result its sectors, including the travel trade, are now facing an ever-changing landscape and uncertainty. As the rebuild begins, businesses will need to re-think and adapt their offering to align with the changed behaviour. [2]

According to a report by Euronews about what tourism will look like after COVID19, some of the key future travel trends that were growing prior to the pandemic have now been hugely accelerated by its impact. Examples of these include 'wilderness tourism', which centres on travellers wanting to get back to nature, and more rural areas now taking more precedence when planning. [2]

Many trends prior to the pandemic will have slowed, while others will emerge stronger in the mind of consumers moving forward

Latest Research and Trends

Euronews also highlighted the growth in 'authentic tourism', where travellers will want to be immersed in 'real' destinations and its local traditions. Other trends also included 'eco-tourism' and 'wellness tourism', where visitors will look to make more conscious choices and will prioritise wellbeing and improved health more than ever. Overall, the rising trend for more outdoor and remote locations will allow for new opportunities and demand for rural areas. [2]

2020 has brought about considerable challenges for the sector, but with this there is also an opportunity to encourage innovation, explore new markets and product development. [3] To aid with this, evolving trends and demand from consumers will need to be understood and used to help inform product development and marketing communications, to ensure businesses stay relevant and in touch with consumers. [2]

Furthermore, as highlighted in the Visit Kent Options Analysis, as part of the EXPERIENCE project, when travel starts to return, the travel trade will be looking for experience-led products to partner with, to kick start their reduced groups market. This may also include a demand for smaller groups tours and experiences, due to potential COVID-19 restrictions and health concerns. [4]

'The travel trade will be looking for experience-led products to partner with to kick start their reduced groups markets'- Visit Kent Options Analysis Report

Survey Methodology and Sample

Data was collected with the use of an online survey sent out to travel trade organisations including tour operators and DMCs via Visit Kent's existing trade database. Following several weeks of data collection, any duplicates and test submissions were removed for consistency and accuracy purposes, which resulted in a total sample size of 40 businesses.

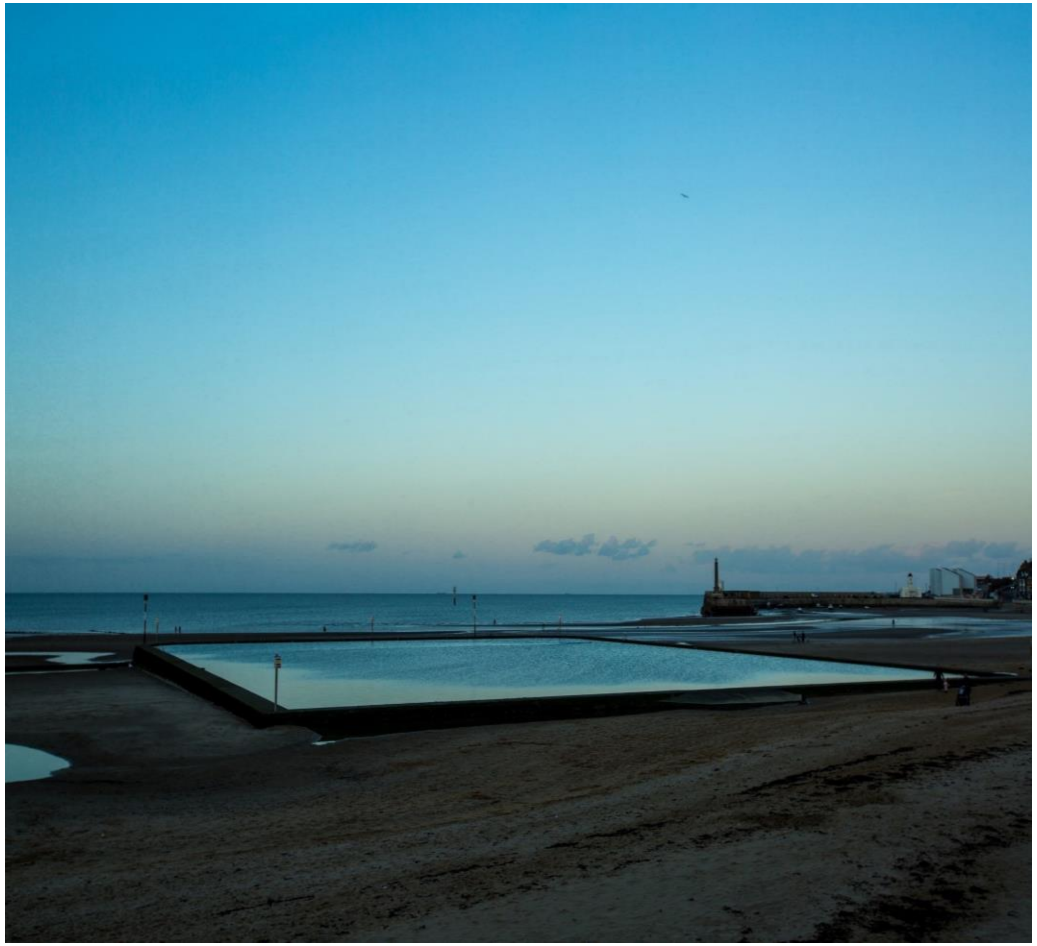
All questions were analysed including both quantitative and open-ended questions, which were broken down by categorising responses by common themes, to allow an overall picture to be presented for these particular questions. Results were also segmented by other variables such as business type and markets where sample sizes allowed, to highlight where insights differ from the overall findings, to add further depth to the report.

Alongside this, where possible, findings from the survey will be cross-referenced with other research. This will include the EXPERIENCE Kent Options Analysis report, which looked to map the experiential product in Kent and identify various strengths, gaps and opportunities for product development and diversification.

Online survey

40 Responses

10-15 minutes to complete



Kent Travel Trade Survey

KEY FINDINGS

This survey aimed to gather insights from domestic and international trade buyers, working primarily in the leisure and educational sectors, to establish what type of products are in demand and to understand any requirements that operators have of suppliers.

64%

Would consider contracting and offering off-season product

When do operators run their tours?

Spring	Summer	Autumn	Winter
75%	55%	63%	33%

40

Organisations

Online Survey

Top markets respondents operate in

1. The UK
2. Germany
3. France

80%

Have previously contracted a Kent product or experience

73%

Have previously offered off-season products

Business requirements to work with the travel trade

1. Products available ideally to book 12-24 months in advance
2. Factor in commission levels and offer net rates
3. Willing to offer a flexible cancellation policy due to COVID-19
4. Quality imagery, editorial/copy and video content

75% of trade organisations consider accessibility when contracting

POST COVID-19

Top 3 types of requested activity- New enquiries

- Private guided tours of indoor spaces
- Private guided tours of outdoor spaces
- Smaller group sizes

Clients are looking for a combination of **good value and high-end** elements

78%

Have received new enquiries

55% for large groups

45% for private family groups &

42% for couples

Need for more suitable and good value **accommodation** options

Product themes of interest

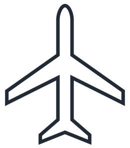
1. Culture
2. Food and Drink

There is a need to promote products that are **unique to the region** due to rising competition from other destinations

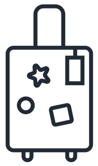
Business Type & Markets

The survey initially asked respondents to select their type of business, alongside what type of travel they operate in. For both questions businesses could select all that applied, with findings showing that the majority of respondents **(65%)** that completed the survey stated they were a tour operator. This was then followed by **20%** who selected coach operators and **18%** selecting they were a DMC, with the remaining **6%** classing themselves as either a cruise ground handler or a travel agent. And looking at type of travel, leisure was the most frequently selected **(90%)**, followed by those operating in educational-based travel **(20%)** and the corporate/business sector **(13%)**.

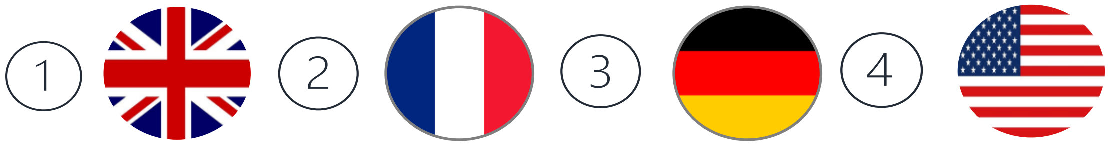
Respondents were then asked to select which markets they operated in, with findings showing that the UK was selected by the largest proportion of trade organisations, followed by France, Germany and the US. Although, other European markets such as Italy, Spain and The Netherlands were also selected by a significant proportion of respondents, alongside Canada.



65% Tour operators
20% Coach operators
18% DMC
3% Cruise ground handler
3% Travel agent



90% Leisure
20% Educational
13% Corporate/business



What markets do you operate in? - % All respondents

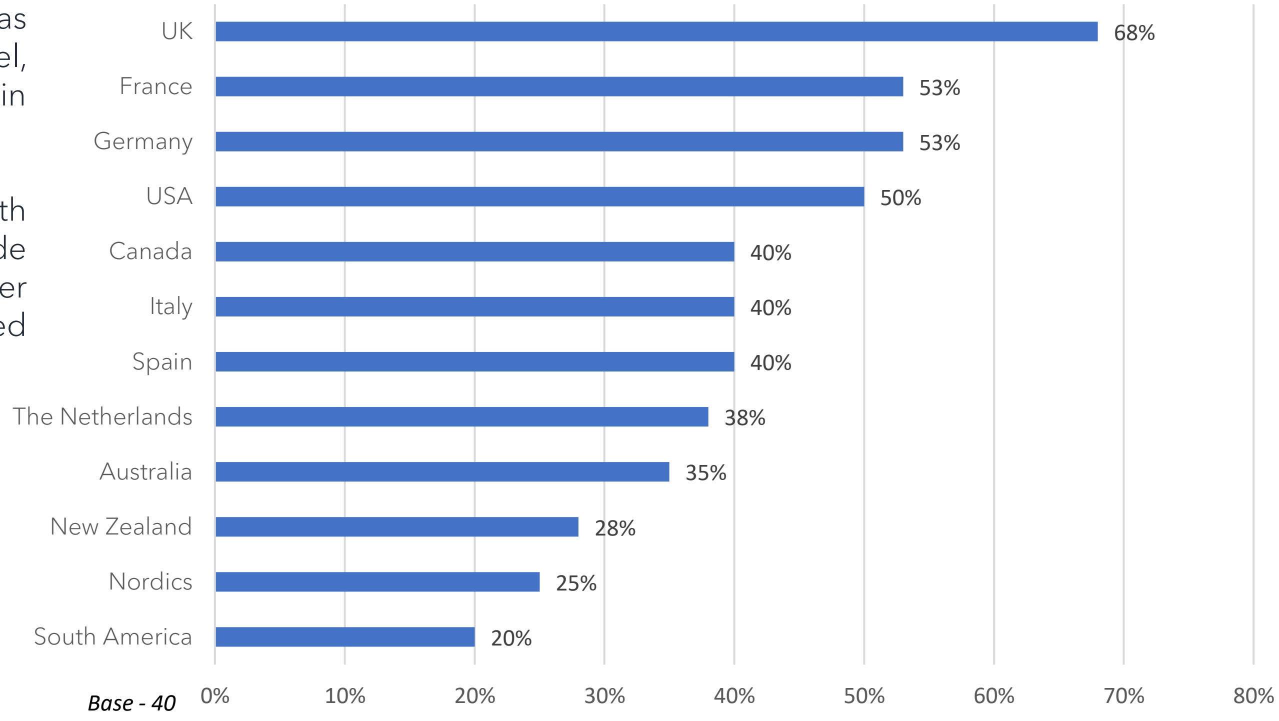
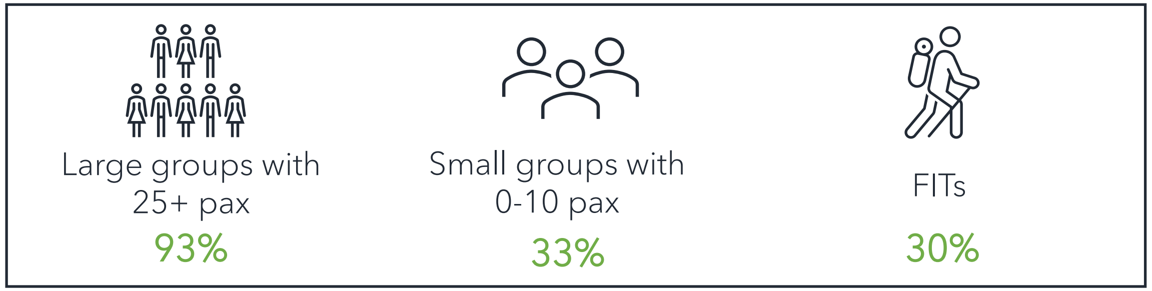


Figure 1: Graph showing % of respondents and markets their business operates in

Clients and Popular Leisure Experiences/Incentives

To understand trade organisations' markets in more depth, the survey asked respondents to specify who their clients were, this included small and large groups, alongside FITs, for which respondents could select multiple types. Results show that the most significant clientele for organisations were large groups with 25+ pax, selected by **93%** of respondents. Following this, small groups (0-10 pax) and those that cater for FITs were both selected by around **30%** of respondents. When looking at responses of those that selected small groups by market, the USA emerged most strongly **(69%)**, with the top five for this group also including the UK, Italy **(both 62%)**, Spain and Australia **(both 54%).** This perhaps indicates the prominence of smaller group travel in these markets.



PRE COVID-19

The survey then looked to gain insight into how trade organisations were operating prior to COVID-19. This sub-section of the survey begins by asking respondents to select their most popular types of leisure experiences/incentives prior to the pandemic. Both sightseeing and private guided tours around sites of historical interest emerged most strongly, both selected by **90%** of organisations. This was then followed by food and drink tastings **(40%)** and various immersive experiences **(30%)** such as brew your own beer and cookery classes. These findings support international visitors' overall interest and motivation around heritage and sites of historical interest, which has always been a major motivation to visit the UK. Alongside rising pre-pandemic trends of more local and immersive experiences and learning new skills.

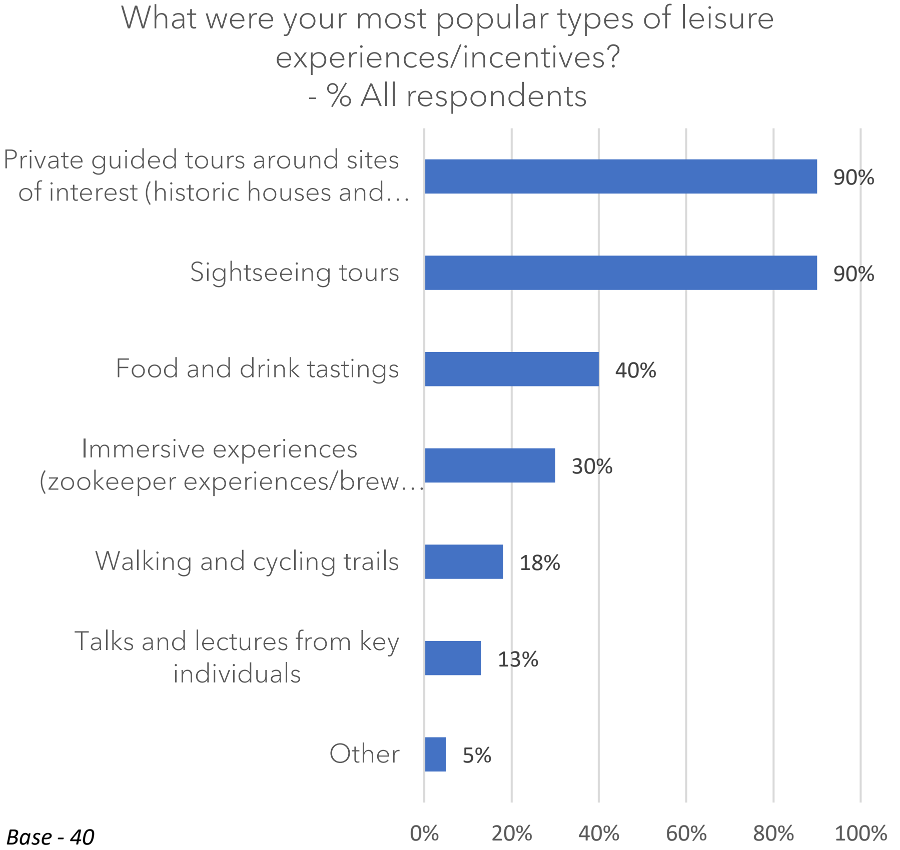


Figure 2: Graph showing % of respondents and their most popular types of leisure experiences/incentives pre-COVID-19

Rising Trends and Experiences

To gain a deeper insight into activity and trends pre-COVID-19, organisations were asked to specify if they were seeing a rise in any new trends or types of experiences. Of the **55%** of organisations that stated they were, they were asked to provide further details. Data was analysed by sorting answers into common themes, with the following areas emerging.

- The most predominant trend that organisations felt emerging prior to the COVID-19 pandemic centred on clients looking for unique and private tours and experiences. Examples included requests for one-off experiences that couldn't be booked online, alongside tours after hours and behind-the-scenes experiences.
- Another major theme that emerged was the rising demand for food and drink experiences, with requests ranging from afternoon teas, gin and whisky tastings, to Instagram-friendly culinary tours and hands-on demonstrations.
- Several organisations also stated they were seeing consumers looking for experiences that allow them to be immersed in local cultures and with local people, including local guides and meeting local people.
- Findings also highlighted the rising demand for active and outdoor activities, centred around nature and fresh air.
- Other areas included those looking for more specialised tours, located in areas outside of mainstream destinations, as well as packages centred more around slow travel.
- But overall, there was considerable interest in experiential packages and activities, which supports wider project activity.

Clients were looking for unique and private tours and **experiences**

Figure 3: Most common themes when asked about any rising trends/experiences pre-COVID

Inclusion of Kent in Itineraries and Programmes

In order to gain a more focused insight into existing trade activity in Kent, pre-COVID-19, the survey asked respondents if any Kent-based products or experiences had been included in their itineraries and programmes. Results show the inclusion of Kent was high, with **80%** stating they had included a Kent-based product in their activity prior to the pandemic.

As illustrated below, heritage-based attractions and tours again emerged most strongly, followed by food and drink experiences and coastal destinations. And in terms of regional spread, most trade activity was concentrated in East and West Kent, with the exception of the Historic Dockyard Chatham and Rochester in North Kent. Overall, this interest clearly demonstrates Kent's appeal to both a domestic and international audience pre-COVID. Looking to the future these pre-existing hooks can be developed and linked up with other lesser-known experiences and destinations.

Kent heritage attractions were the most popular choice for trade programmes, including castles, stately homes and guided tours. Attractions and sites mentioned included - Canterbury Cathedral, Hever Castle, The Historic Dockyard Chatham, Leeds Castle, Sissinghurst Castle and trips to Rochester.

Kent's food and drink offering also emerged strongly, with experiences such as brewery tours, food and wine tasting experiences, alongside cooking sessions and vineyard visits.

Several programmes and itineraries also included coastal destinations, including Dover, Whitstable and Folkestone.

Gardens were also commonly included in programmes.

Cricket sessions.

Steam Railways experiences and tours.

Off-Season Products

As wider project activity will be focused on developing Kent's off-season product offering, trade activity and interest in products in these seasons were examined, alongside any potential interest in contracting and offering off-season products.

As shown in figure 4, a significant proportion **(73%)** stated that off-season products have previously been included in activity. Examples included Christmas markets and shopping trips, light festivals, indoor dining and smaller private tours. Alongside these, some organisations also said that they function all year round and offer products in every season.

And of those that hadn't previously offered off-season products, reasons given included the uncertainty around weather conditions in the UK and that summer weather is more appealing to their clientele.

Reasons given also included barriers such as lack of awareness and that some attractions are closed during the winter period. However of this group **64%** said they would consider contracting off-season products.

Reasons given also included barriers such as lack of **awareness**

Did you offer off-season products?

Yes 73%

No 28%

Would you consider contracting and offering off-season product?

Yes 64%

No 36%

Figure 4:% of previous uptake in off-season products and % of respondents that stated they would consider

PRE COVID-19

Results for these questions were also analysed by organisations operating in various markets, to highlight any differences and give further insight into off-season demand.

Organisations operating in both the USA **(75%)** and Canada **(88%)**, displayed a higher level of engagement with off-season products compared to overall results. Alongside this, **100%** of those operating in Canada and **80%** operating in the USA, stated they would consider contracting off-season product, highlighting the overall appeal of this offering to these particular markets.

In terms of those with a lower previous engagement with off-season products, this included Italy at **44%** and Spain at **50%**. Although, the majority of those operating in these markets still displayed positive interest in contracting and offering this in the future (**67%** for Italy and **75%** for Spain). Those that catered for the UK **(67%)**, German **(75%)** and French market **(71%)** also showed a higher level of consideration compared to the overall findings.

Overall, findings show a positive interest in contracting off-season products, showing again support and demand for project activity, particularly among the international markets outlined above.

There are several barriers that can be addressed through the activity of this project, including raising the awareness of availability of off-season products in the county and highlighting experiences that are not weather dependant.

New Markets and Enquiries Post-COVID

Due to the unprecedented impact of COVID-19 and changing travel habits, the survey asked respondents to answer a series of questions regarding their activity post-COVID. This included looking at new enquiries that may have been received and if clients are requesting different types of experiences or destinations. These insights will allow for interest in particular areas to be identified, giving Kent businesses an insight into demand and to help inform product development.

Initially, respondents were asked if they are looking to target any new markets in response to COVID-19, with the majority stating that they were not **(55%).** Of the **45%** that were, these included the UK domestic market, other near European markets, Australia and New Zealand. Responses also included smaller group bookings, FITs and walking and cycling groups. The survey then asked respondents if they are starting to receive new enquiries for future travel, with findings showing that new enquiries were high, with **78%** having received requests. Results were also analysed by organisations operating in various countries, and figures show that new enquiries were particularly high for those operating in The Netherlands, Germany and the UK, alongside Spain and the USA. This perhaps indicates that these markets in particular are looking more towards future travel.

New Enquiries (%)

All respondents

78%

Netherlands	Germany	The UK	Spain	USA
93%	91%	89%	88%	85%

When looking at these enquiries in further detail for all respondents, findings show that **55%** have received enquiries for large group bookings, followed by private family groups **(45%)** and couples **(42%)**. And for those operating in the US. and Canada, enquiries for private family groups were higher with **59%** and **69%** respectively. Overall, findings show that there is still a demand for larger groups particularly among those operating in the Canada (**69%**) and Germany (**58%**), alongside those operating in the UK and France (**54%** and **53%** respectively). Furthermore, this demonstrates that it will still be important to cater for larger group markets, but more operators will also be looking at smaller group sizes.

Looking at the enquiries you have received, what type of clients were they? - % All respondents

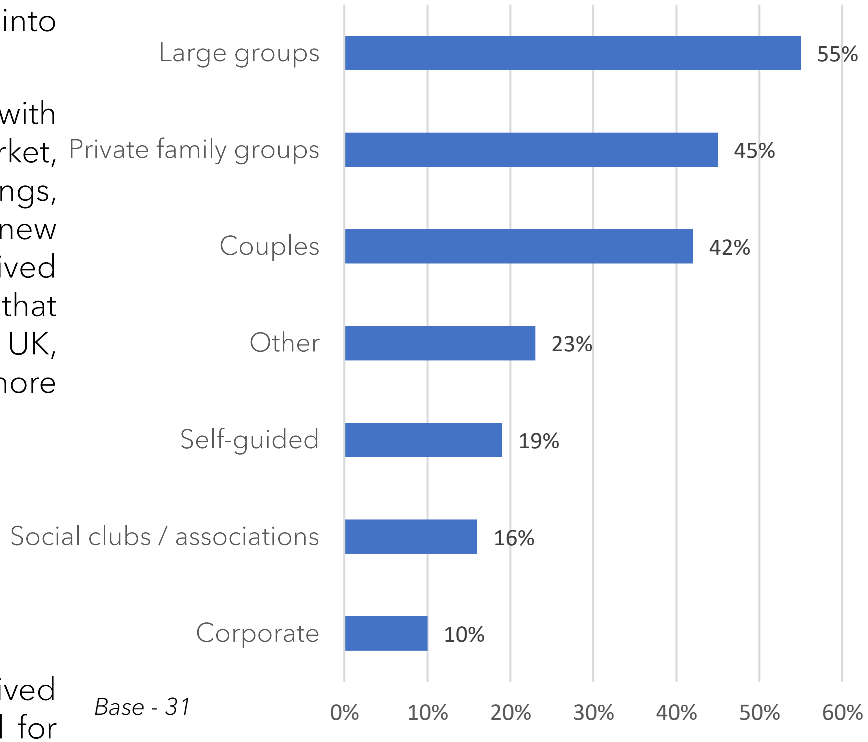
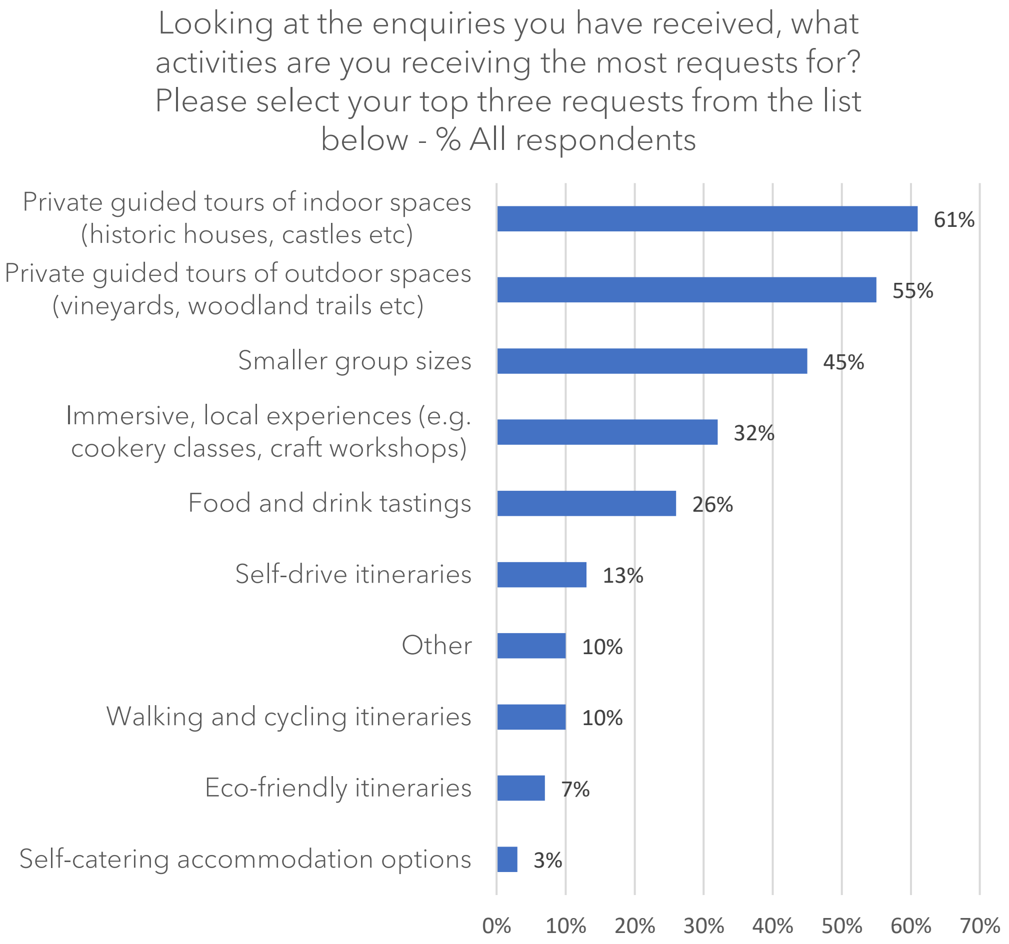


Figure 5:% of respondents that have received enquiries from various types of clients

When asked about what types of experience value clients are now looking for, findings show that **71%** specified that new enquiries included those looking for experiences with a mix of high-end and good value, followed by budget **(42%)** and high-end luxury **(19%)**. And for those that stated they operate in Canada, Germany and France the percentage of new enquiries for high-end luxury experiences was higher, compared to results for organisations overall. This indicates that overall consumers are still looking for good value, but desire some high end elements. Although a more luxury experience may appeal more to the Canadian, German and French markets.

Following this question, respondents were asked to select the top three types of activity that are being requested most frequently. As shown in figure 6, the most commonly selected types of activity were private guided tours of indoor spaces, including those at places of historical interest **(61%)**, followed again by private guided tours but in outdoor spaces such as vineyards and woodland trails **(55%).** Smaller group sizes also emerged strongly, being the third most selected answer with **45%.** This was also particularly high for those operating in the USA **(59%)**, Australia **(70%)**, Italy **(69%)** and Spain **(71%)** where smaller group enquiries was the top selected answer, highlighting this growing trend post-COVID.

Other popular activities requested also included immersive, local experiences **(32%)** and food and drink tastings **(26%)**. These results do certainly highlight a demand and interest in more private guided tours and food and drink tastings, which aligns with rising trends previously mentioned around consumers looking for more one-off and behind the scenes experiences. This shows that demand for these types of experiences will still grow post-COVID-19, although enquiries around smaller group sizes will have certainly seen a rise due to COVID restrictions and social distancing guidelines. Businesses should therefore look to align their product development with these areas, and in particular ensure they can cater for the changing group dynamics and restrictions due to the pandemic.



Base - 40

Figure 6:% of respondents and their top three activities that are being requested

New Products and Experiences

Following questions regarding new travel enquiries post COVID-19, the survey asked respondents what new products and experiences their product teams are looking to offer customers. The following products and experiences emerged as common themes.

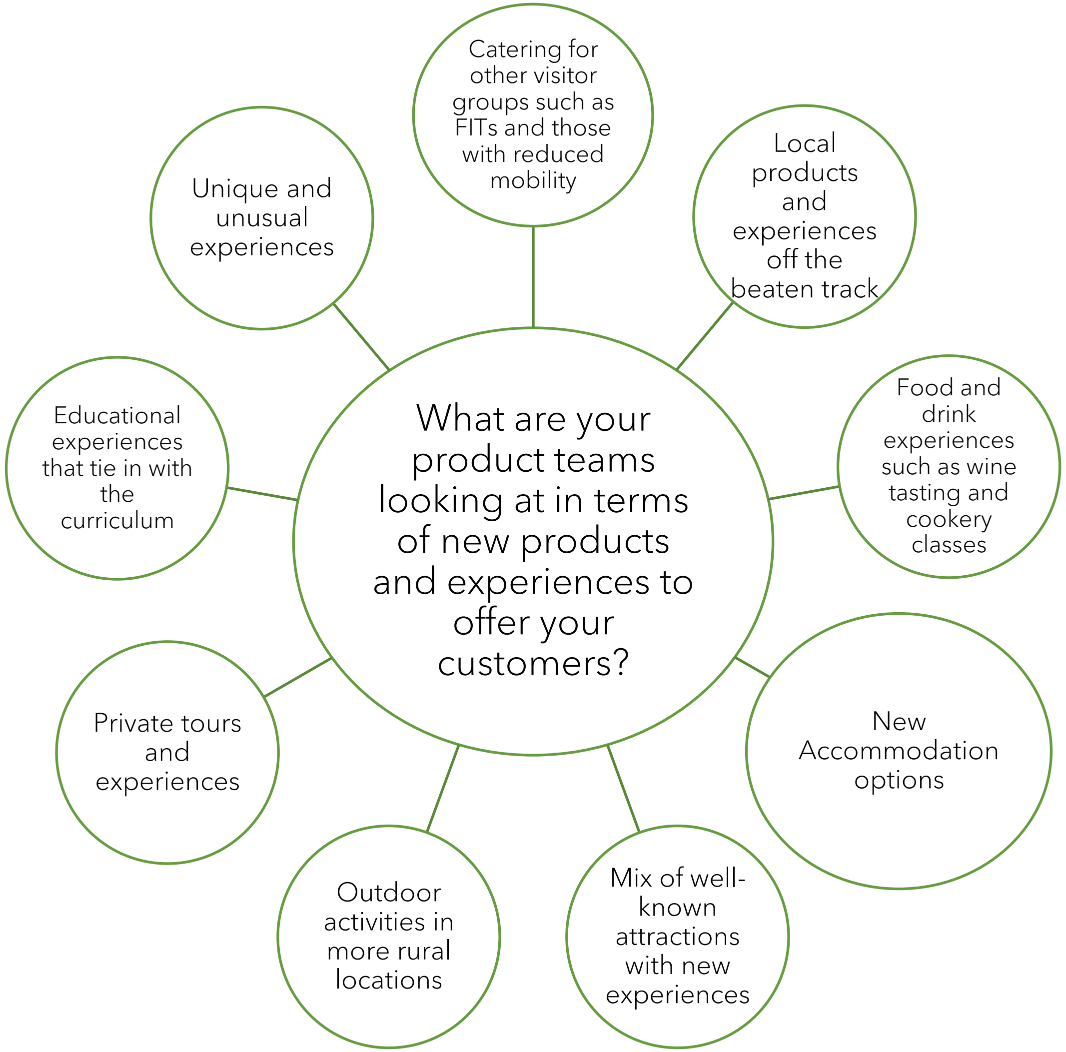
- Outdoor activities - Outdoor activities and experiences in more rural areas emerged strongly, including walking, cycling, hiking and incentive trips around this and included destinations such as Scotland and Ireland. And although only **10%** of respondents specified walking and cycling itineraries were being requested, this may reflect providers preparing for the possibility of the pandemic continuing and more people looking for more healthy, outdoor-based experiences.

- Private smaller group tours - Echoing enquiries received, trade organisations are looking to offer more private and smaller group bookings, including aspects such as special access and after hours tours with custodians.

- Something interesting and different - Findings also showed that product teams are also looking at adding products and experiences that are interesting and different, that are a little more unusual.

- Local traditions - Trade organisations also said that they are looking to introduce more products and experiences that reflect local culture and traditions. This included immersive experiences that capture a sense of place and allow visitors to discover local sites and hidden gems in small groups and families.

- Education - Respondents also mentioned educational activities that tie in with the curriculum, such as WW2 and "Chatham shipyard", which can be incorporated into school group visits. Alongside this, other examples include experiences with guest speakers and lecturers to accompany usual trips.



Accommodation - Trade organisations also mentioned that they are looking at new accommodation options to offer their customers, alongside direct contact with self-catering accommodation providers.

Kent specific - There were also mentions of Kent more specifically, this included the need for more Kent-based products to have preferred supplier status and as mentioned previously, the need for more unusual and new experiences that can be added on to a visit to Kent.

New and well-known - Several trade organisations also mentioned that their product teams are looking at incorporating new experiences, but alongside those that are more well known and established. They stated that in doing this, it is easier to attract clients and makes packages easier to sell, as clients will be attracted initially by the larger sites, such as stately homes and gardens, castles, National Trust properties and coastal destinations.

COVID-19 - Due to the impact of COVID-19, several organisations stated that they are currently looking into what suppliers are still operating post-COVID and which sites are able to welcome groups of various sizes. This will inevitably be a barrier in the short-term and is dependant on local restrictions. Organisations also mentioned that they are looking for COVID-friendly activities.

Food and drink - Other products cited by organisations included food and drink experiences, including cooking classes, afternoon teas and wine tasting.

Additional markets - Several organisations also stated that they are looking at providing more tours for specific markets, including more scheduled tours for FITs and activities that suit senior visitors and visitors with any mobility issues.

Overall, some organisations raised that they are offering clients similar products to that of previous years, alongside reusing their 2020 brochure which was never used due to COVID. However, in general findings show that trade organisations are looking for new and interesting products and experiences to combine with larger attractions which will act as hooks for clients. As seen previously, there is certainly a demand for more out of the ordinary and exclusive tours and experiences, experiencing local traditions and local produce. All of which present areas which Kent businesses can tap into to fulfil this demand, creating packageable experiences that appeal to the trade and overseas markets.

Contracting Timeframes and Commission Levels

To help Kent businesses prepare to work with the travel trade, the survey also asked organisations about their commission levels, alongside timeframes around contracting products and experiences. These insights will enable businesses to understand trade activity in more depth and help them to prepare their product and experiences to meet their requirements.

Findings show that the largest proportion **(45%)** of trade organisations look to contract 12-24 months in advance, followed by **33%** specifying that they would need to do this between 7-12 months beforehand. And when it came to commission levels, **35%** selected 'other', which consisted of a mix of those stating that this did not apply to them, they only worked with net rates or they did not charge commission at all. Although, **18%** stated they charge up to 0-2.5% commission, closely followed by **15%** charging between 11-15% commission.

How far in advance are you contracting? - % All respondents

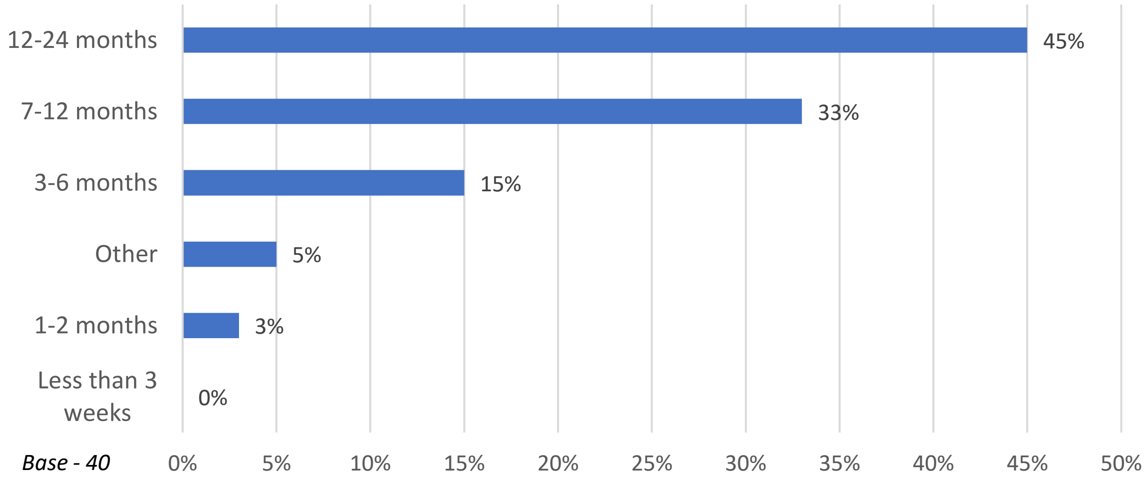


Figure 7:% of respondents and how in advance they look to contract

Do you require block net rates or best rate available on the date?

Net rates	Best rates	Both	Other/NA
55%	15%	5%	25%

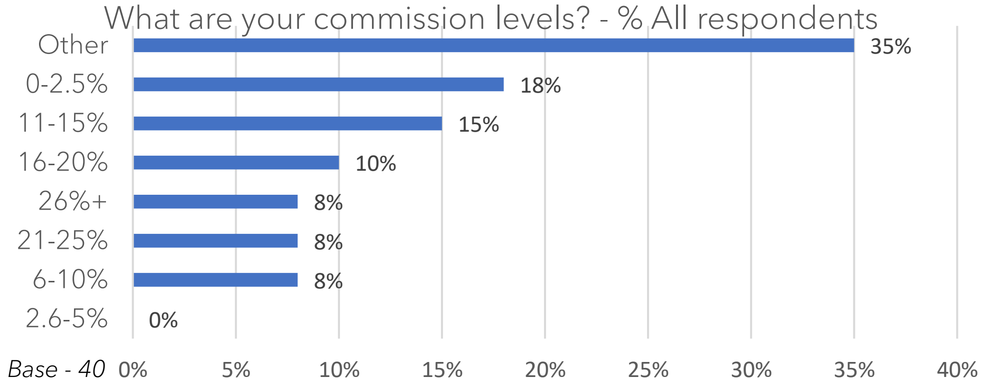


Figure 8:% of respondents and the commissions levels they look for

Organisations were then also asked if they require block net rates or best available rate on the date of the booking. Results show that the majority **(55%)** require net rates, with only **15%** selecting best rates. **25%** of organisations did select 'other', which ranged from preferring an annual contract, to rates being dependant on the product itself. Findings indicate that it is essential that businesses looking to work with the trade look to have products and experiences available to book ideally 12-24 months prior to be visible to the trade, in addition to ensuring they have an understanding of commission levels and what net rates they are able to offer.

Cancellation Policies and Requirements

Organisations were then asked to specify if they have any specific cancellation policies or requirements, and the diagram below displays the common themes identified, alongside some examples of comments given by organisations. Overall, the main sentiment among trade organisations was that there is an increasing need for suppliers to be as flexible as possible with cancellation policies given the uncertainty with COVID-19 restrictions. Some cited that clients are uneasy about not having this flexibility, with some suggesting free cancellation 2-7 days before is needed to increase consumer confidence in booking. Organisations also cited that they usually have cancellations ranging up to 4 weeks prior to the visit, although given the pandemic they are also looking for this to be more flexible given the changing situation. These findings and insights from organisations clearly indicate that businesses will need to be willing to offer flexible terms and perhaps free cancellations nearer to the time of arrival, compared to pre-COVID-19.

Flexibility due to COVID-19

"We're looking for shorter cancellation policies as requested by the clients due to the uncertainty of the future because of the COVID-19"

"Flexibility would be even more important especially in the post-COVID-19 world"

"For FIT, looking to have cancellation policies and requirements much nearer to time of date as flexibility has become prime concern of clients"

2-4 weeks prior

"Cancellation usually 4 weeks prior to arrival foc. But due to Covid19 and more last-minute bookings we should work with shorter cancellation times, e.g. 2-3 weeks"

"For groups, free cancellation up to 30 days before arrival, and a further flexibility for a few cancellations closer to the arrival date"

"We often work with 2-4 weeks cancellation"

Other

"Free cancellation before visit day"

"Our operators can not work on deposits at present"

"When the UK is under a lock down it would be great not to pay cancelation fees and to get refunds"

Seasonality

As mentioned earlier in the report, many of the organisations that completed the survey stated they have previously offered off-season products to their clients and of those that haven't, there was considerable interest in doing so. To explore this interest further, the survey asked organisations in which seasons they would like to see more products available. Findings show that there is interest in more products being available in each of the seasons, although the season with the highest interest was spring, with **75%** of respondents selecting this. This was then followed by autumn **(63%)** and summer with **55%**. And looking to winter, this was selected by the fewest organisations, with **33%,** which may also reflect that certain geographical markets such as Spain and Italy typically do not seek to travel in the winter months.

Linking this interest with development of off-season products and experiences as part of the wider project, findings do certainly support this, with interest in each of the seasons between October and March. Although, overall businesses could focus and prioritise looking at offering experiences to the trade in spring and autumn to reflect overall demand, while still capturing those looking for a winter offer.

Seasonal Interest

Spring

75%

Spring was selected by a larger percentage of those organisations that operated in the UK (82%) and The Netherlands (80%) compared to overall results.

Summer

55%

Interest in more product in the summer months was fairly consistent across organisations working in different markets.

Autumn

63%

Looking at interest in autumn products, organisations operating in France (67%), Germany (67%), The UK (67%) and Spain (69%) displayed a higher interest compared to results overall.

Winter

33%

Interest in winter based products by those operating in various markets in most cases were similar to the overall findings. However, this interest was lower for those operating in Spain (19%), The Netherlands and Italy (both 13%).

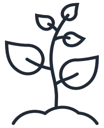
Sustainability and Accessibility

Trade organisations were asked if they consider sustainability or reduction of carbon emissions when contracting new products and experiences. Results show that a significant proportion **(70%)**, did not see this as a deciding factor or something that they actively look for, with the remaining **30%** stating they do consider sustainability when contracting. Of those that did consider sustainability, they were asked to specify what this looks like. Several organisations cited they preferred contracting accommodation that is sustainable and local-run, alongside looking for sustainable products to include, such as local produce. Another common response was the increasing awareness and requests from clients for tours that focus on sustainability as a theme. Other answers included those encouraging the use of trains and looking to support the local economy and communities. However, several organisations stated that although they do consider sustainability and like to know what suppliers are doing to be sustainable, it is not an essential requirement, unless a supplier is part of a sustainable themed tour.

The survey then asked if accessibility is considered when contracting an experience. This area emerged as a more necessary requirement, with **75%** stating this is a consideration. In general, findings show that consideration must be given to accessibility in particular to ensure that they appeal to the trade, and while sustainability may not be an essential requirement when contracting, sharing sustainable practices and statements is still advantageous.

Do you consider sustainability/carbon-footprints when contracting?

No 70% Yes 30%



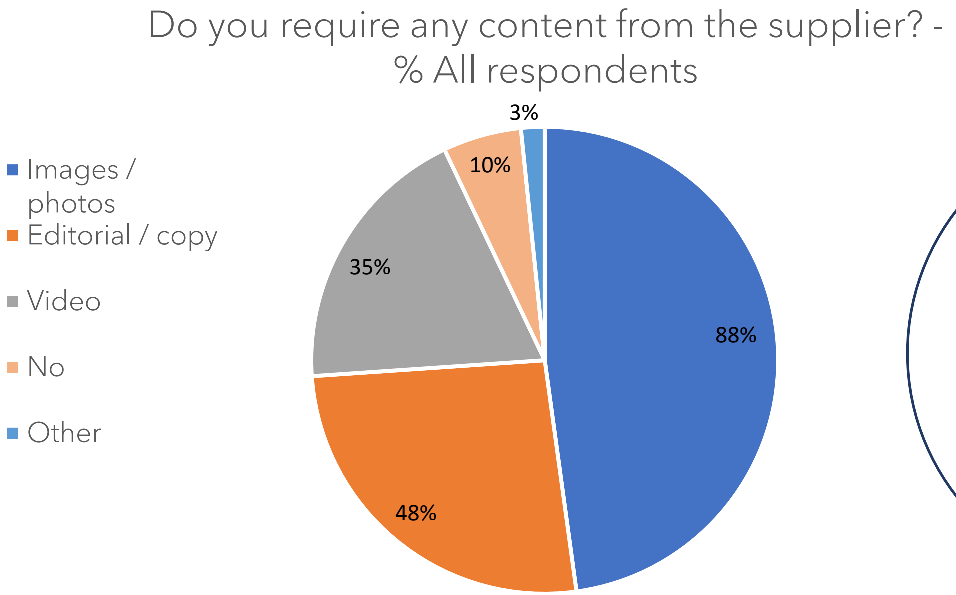
Do you consider accessibility when contracting an experience?

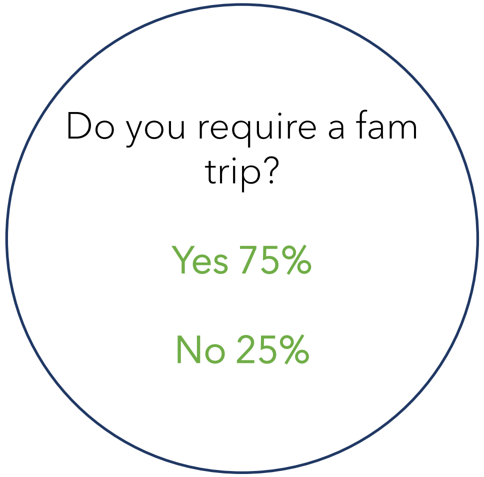
Yes 75% No 25%

Content and Requirements

Moving onto other requirements, organisations were asked if they require any content from suppliers, alongside fam trips. Findings firstly illustrate the importance of imagery from suppliers, in addition to editorial and copy. Therefore there is a need for businesses to ensure they have quality content available to share with the trade, to showcase and sell their products and experiences. Results also highlighted the importance of video content, with this being selected by **35%** of respondents.

When asked if they would require a fam trip to view and experience a property, itinerary or experiences themselves, **75%** stated they would. This highlights the importance of fam trips and businesses should be willing to provide this for the trade if they can, to make themselves more competitive.





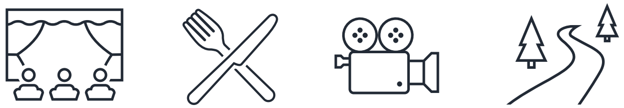
Base - 40 *Figure 9:% of respondents that require various types of content from their supplier*

Interest in Product Themes

Moving onto future travel and interest in contracting products and experiences of a certain nature, the survey asked trade organisations if businesses were to develop a product around a particular theme would they be interested.

Looking at the overall results, the theme that organisations displayed the most interest for were products around culture, with 68% selecting this. This was then closely followed by interest in food and drink themed products (63%). Both of these areas tie in with the previously mentioned demand for experiencing authentic destinations, traditions and local produce. This therefore is certainly an area that should be developed and offered to the travel trade. Interest in the creative industries also emerged strongly (50%), including areas such as film, music, art and television. This interest was also highlighted in the Visit Kent Options Analysis report, which touched on the rise of demand and popularity of pop culture and television-based experiences and links with film locations.

Looking at other areas, interest in landscapes, nature and outdoor activities was selected by 48% of organisations and 40% selected eco-tourism products. These, together with walking and cycling which still saw a modest 35% of interest, show the growth in outdoor and rural themed experiences. This also mirrors the travel trends outlined earlier in the report, and rising trends seen by organisations prior to the pandemic. Interest in events, festivals and multicultural markets and foods did see less of an interest compared to previous themes, however for both over a third did display an interest, so are still certainly areas to be explored. And while wellness and well-being was selected by 23% of organisations, this is also a theme that can be incorporated into other areas. And lastly, although pilgrimages and equine scored low, these are perhaps more niche areas that will appeal to certain markets and interest groups.



If we were to develop product in the following themes, would you be interested in contracting them? - % All respondents

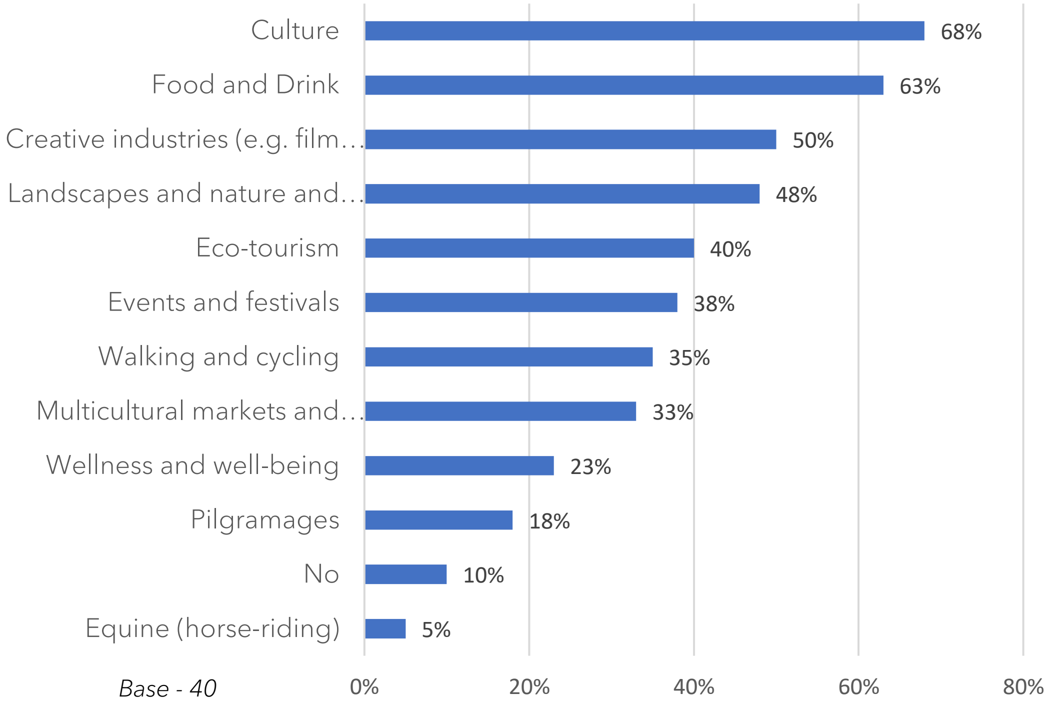


Figure 10:% of respondents and their interest in contracting products around the above themes

INTERNATIONAL MARKET INSIGHTS

Landscapes, nature and outdoor activities

Organisations that operate in Spain (63%), the Netherlands (53%), the USA (65%) and France (57%), displayed a higher level of interest in landscapes, nature and outdoor activities, compared to 48% overall.

Eco-tourism

In terms of eco-tourism, the highest level of interest was seen from organisations that stated they consider sustainability when contracting, with 67%, compared to 40% overall.

Walking & Cycling

Organisations operating in Italy and the Netherlands displayed the highest level of interest in walking and cycling themed products, with 56% and 53% respectively. This was also the case for those operating in the USA and Canada (both 50%) and France (48%). those that stated they consider sustainability also displayed a high level of interest in these activities.

Food & Drink

Food and drink themed products were most favoured by organisations operating in the USA (80%) coming in first place, and by those operating in Germany (71%), compared to 63% overall.

Wellness & Well-being and Pilgrimages

Wellness and well-being was most favoured by those organisations operating in Canada, with 44% selecting this compared to 23% overall. And interest in pilgrimages was highest for USA operators (35%) and those operating in Spain, Italy and Canada (all 31%), compared to 18% overall.

Barriers

Organisations were then asked if there were any barriers to expanding more into Kent. Findings show that the largest proportion of organisations felt the lack of suitable accommodation options in the county was a challenge, alongside those that stated 'don't know' (both **35%**). This was then followed by **25%** selecting that suppliers do not understand how to work with the travel trade and **23%** feeling that businesses in Kent have unsuitable cancellation rates. For those that selected 'other', reasons included the need for better value accommodation, with some organisations citing that hotels are pricing themselves above the market average. Organisations also raised the need for Kent to promote products that are unique to the region, to stand out against other UK destinations.

Overall, barriers such as lack of availability, bookable product and net rates were only selected by a small proportion, showing that these aren't necessarily barriers for most organisations. General barriers concerning lack of suitable accommodation and good value accommodation emerged most strongly, indicating that developments in this area would yield most value. This, alongside working with Kent businesses to become more trade friendly should therefore be areas of focus.

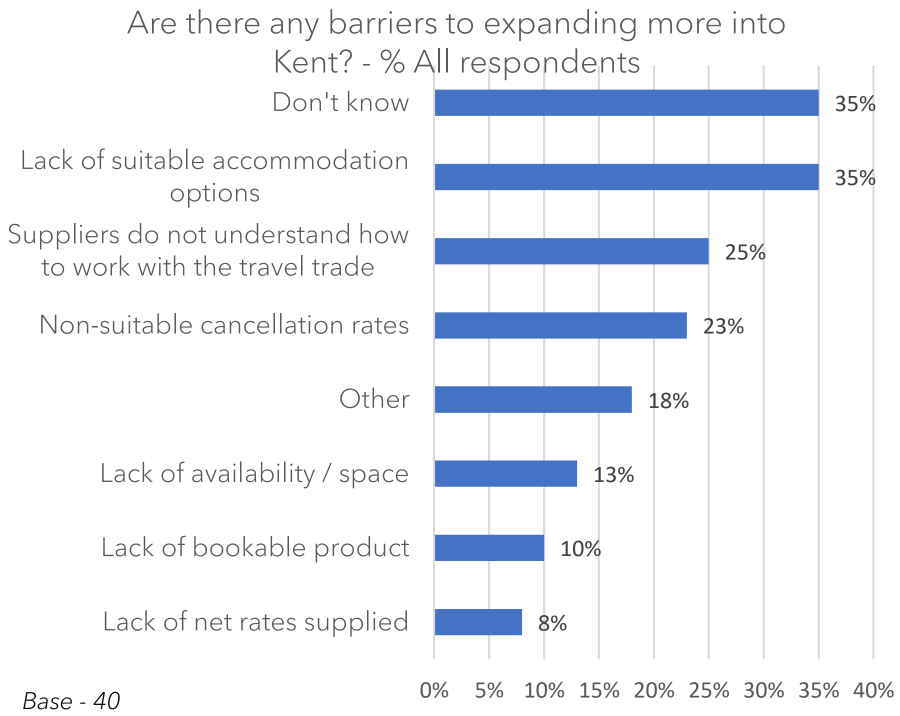


Figure 11:% of respondents and barriers to expanding more into Kent

Examples of UK Products and Destinations

The survey then asked respondents to give an example of a UK product or destination that they feel provides quality experiences and services. The most common destination mentioned by organisations was Scotland, including Highland experiences and whisky tasting and quality food and drink. These organisations also highlighted the quality offering in areas such as Edinburgh, Fife and Aberdeen. Alongside this, organisations also mentioned destinations including Wales and Northern Ireland and products such as historical venues, gardens, Highclere Castle, where Downtown Abbey is filmed, and Historic Royal palaces. Other destinations included those with a strong countryside offering such as Somerset, the Cotswolds and Cornwall, alongside more urban destinations including Manchester, Liverpool city and London. The diagram on the following page illustrates the destinations highlighted by trade organisations.

Examples of UK Products and Destinations

Examples of Trade Organisations

The following list are examples of organisations that completed the survey, which include a mix of tour operators, DMCs, educational-based providers, coach providers and travel agents.

E-voyages

Vivu Journeys UK Ltd

Saga Holidays

Albatross Group

JacTravel

Roadmark Travel Ltd

Abbey Ireland & UK

Anglo Educational Services

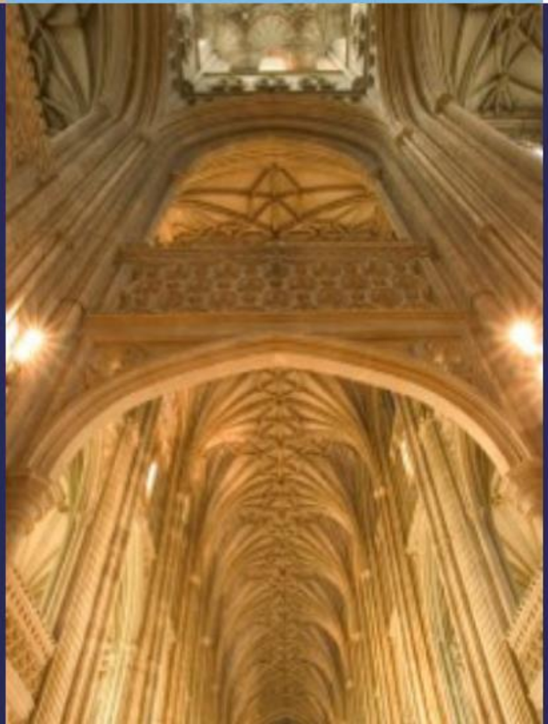
Key Findings & Recommendations

Interest from trade organisations pre-COVID clearly demonstrates Kent's appeal to both a domestic and international audience, which businesses can build upon by offering new experiences and products. The inclusion of Kent products were most predominantly in East and West Kent, with perhaps an opportunity to increase trade activity and visibility of products and experiences in North Kent.

The positive uptake and interest in contracting off-season products, shows support and demand for EXPERIENCE project activity, with interest in each of the seasons between October and March. Although, overall businesses could focus and prioritise experiences to the trade in spring and autumn to reflect overall demand, while still capturing those looking for a winter offer.

There is a need to raise awareness of the availability of off-season products in the county and highlight experiences that are not weather dependant that appeal to the interests of various markets.

New enquiries were higher for those operating in The Netherlands, Germany and in the UK, alongside Spain and the USA, indicating that perhaps these particular markets are looking more towards future travel.



New enquiries indicate that consumers are looking for a combination of good value and high-end elements.

The demand for group travel will still grow post-COVID, although enquiries around smaller group sizes have certainly seen a rise due to restrictions and social distancing guidelines in place. Businesses should look to align their product development with these areas, and in particular ensure they can cater for changing group dynamics and restrictions due to the pandemic.

Key Findings & Recommendations

Trade organisations are looking for new interesting experiences and out of the ordinary and exclusive tours that include local traditions and local produce. All of which present areas in which Kent businesses can tap into to fulfil this demand, creating packageable experiences.

It is essential that businesses looking to work with the trade have products available to book ideally 12-24 months prior and ensure they understand commission levels and what net rates they are able to offer.

Businesses will need to be willing to offer flexible cancellation policies, compared to pre-COVID-19.

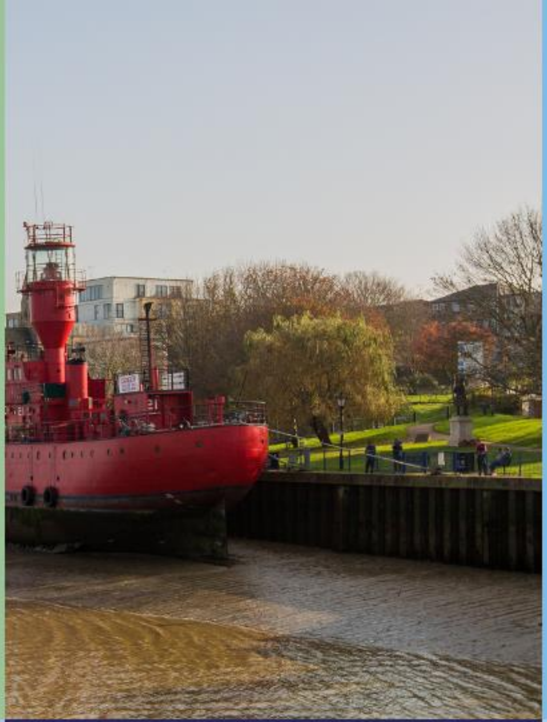
Businesses should ensure they are as accessibility friendly as possible, and while sustainability may not be an essential requirement when contracting, sharing sustainable practices and statements is still advantageous, particularly when tapping into the eco-tourism market.

Businesses wanting to work with the trade should ensure they have quality imagery alongside editorial and copy and video content if possible, to share with the trade to showcase and sell products and experiences.

Areas in which the trade displayed most interest included products and experiences around culture and food and drink. This represents the demand for experiencing authentic destinations, their traditions and local produce, and therefore is certainly an area that should be developed.

Key Findings & Recommendations

Another area which presents an opportunity is products and experiences linking to the creative industries, including film, television, art, and music. This interest was also highlighted in the Visit Kent Options Analysis report, which touched on the growing demand and popularity of pop culture and television-based experiences and links with film locations.



Interest in landscapes, nature and outdoor activities, eco-tourism and walking and cycling mirrors travel trends around wilderness tourism. This presents another area with significant potential and appeal to international markets.

Destinations such as Scotland offer a good example of products and experiences that appeal to the trade, which allow visitors to be immersed in local traditions and unique aspects of the area such as the Highlands and whisky experiences. Trade organisations also felt there was a need for Kent to promote products that are unique to the region. Using examples of best practice can aid towards showcasing this.

Products such as heritage sites, gardens and more iconic attractions will always hold appeal to overseas markets, although these can act as hooks to attract visitors and well-known sites can be packaged with new experiences.

Barriers around lack of suitable and good value accommodation indicate that developments in this area would yield the most value and should therefore be an area of focus.

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

[2] Euronews Travel (2020) Travel after 2020 what will tourism look like in our new reality?

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This research report has been produced by

RUBY RUSS
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VISIT KENT
BUSINESS
GARDEN of ENGLAND

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