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

11 December 2020

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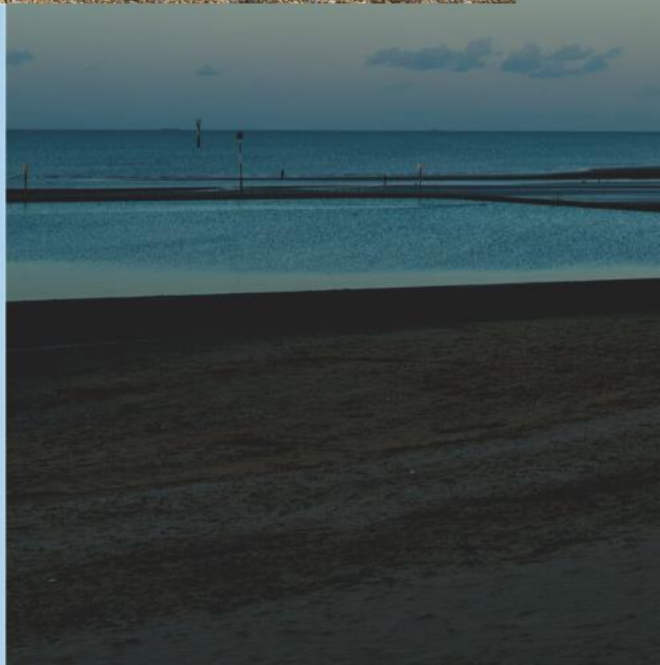


Introduction and Report Overview

This report looks to present findings from a recent survey, which aimed to gather insights from DMCs and buyers that work primarily in the incentive and business events market. The survey aimed to establish what products are in demand and what businesses need to do in order to work with buyers and provide support in driving demand for Kent. Using key findings and recommendations, Visit Kent will work with local authority partners to engage both tourism and non-traditional tourism businesses across the region to help adapt and diversify their product offering, to ensure that there are new, bookable and experiential products all-year round. Key to this product development will be supporting local business events suppliers to offer valuable, bookable experiences that are suitable for future itineraries and customers within the incentive and business events industry.

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. 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.

And given the unprecedented impact and challenges brought about by the COVID-19 pandemic, it is essential that destinations work to support the MICE (Meetings, Incentives, Conferences and Events) market in the rebuild. Furthermore, this activity will help drive the demand for Kent by providing all-important reasons to visit, and help make the destination and businesses more competitive. To enrich and 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 and clients, popular types of incentive/extra-curricular activities, rising trends and enquiries post-COVID. And lastly, key takeaways will be summarised and a list of recommendations will be compiled to inform the next steps in this activity.

Valuable, bookable experiences that are suitable for future itineraries and customers within the incentive and business events industry

Latest Research and Trends

The COVID-19 pandemic has had a significant impact on the tourism industry, and most notably one of the sectors that have been most affected is the MICE sector. Since the initial lockdown, there has been an almost shutdown of events, conferences and large meetings, which has had a major impact on the industry economically and for those that benefit from it. Prior to the pandemic the business events industry contributed over £31 billion to the UK visitor economy and in 2018 inbound visits for business purposes represented 22% of all visits and £4.5 billion in spend. Alongside this, inbound business events attendees spend on average 30% more than leisure visitors, illustrating the value and importance of the sector to the economy. [1]

The value of the sector can also be seen through the benefits and income to other local businesses, including hotels, local attractions, and incentive activity and transport providers. There are also other wider benefits and legacies to hosting conferences and business events, such as knowledge sharing, professional development and building relationships through networking and contracting opportunities. Increasingly, destinations across the world are developing strategies for attracting high-profile business events in key sectors as a way of showcasing their own expertise in this industry, with the aim of increasing inward investment opportunities.

Research has also found that there is a relationship between the distance a delegate has to travel to attend a business event in the UK and spend, alongside their likelihood to extend their visit for leisure purposes. For example, according to research conducted by VisitBritain, delegates from outside the EU spent the most on average followed by those from Europe and those within the UK. These findings show the value of attracting inbound delegates and perhaps those from further afield.[1] By working to extend length of stay of business visits, this can contribute more towards the visitor economy and benefit local businesses. The research also notes that a main reason for extending business visits centres on the opportunity to visit and see places or take part in experiences they might not otherwise partake in while on leisure trips. [1]

Overall, these findings certainly present an opportunity for destinations that may lack awareness or international appeal to invest in resources to encourage further visitation, alongside encouraging business visitors to engage in leisure activities during their stay and extend their visit. [1]

Latest Research and Trends

Looking at some of the key trends within the sector that were emerging prior to the COVID-19 pandemic, this included the rising need and awareness for sustainable practises, as businesses look to explore ways they can lessen the impact of their events. This included many organisations being keen to improve their CSR records and to introduce processes and ways to reduce waste. Although some trends will have been altered and perhaps slowed down by the pandemic, some will also have inevitably sped-up. And the issue of sustainability and corporate responsibility around health and safety will certainly continue to be a major priority. [2]

Another trend which will likely see growth, centres on the increasing investment in training and development and the benefits this can bring employees and businesses. Therefore, businesses will look more towards incentive and personal development activities to increase staff wellbeing, promoting personal growth and skills development and subsequently business competitiveness. Further to this, there is also an emerging trend around the wellness movement and the demand for experiences that improve general wellbeing and happiness, including elements such as local produce and traditions, and breakout activities that centre on a more mindful approach. [2]

According to an article published on the impact of COVID-19 on the hospitality and events industry, in the longer-term businesses will need to consider more smarter and digital ways of working, due to a significant digital shift.[3] And due to restrictions and social distancing guidelines the use of virtual events and other virtual elements may be an aspect that continues to evolve. Overall, research shows the value of the sector for both venues, hotels and surrounding local businesses and the incentive and training market is one that will certainly see growth, incorporating key themes such as wellness and personal development. Therefore, this presents a considerable opportunity to maximise the county's appeal to the business and incentive market both domestically and overseas to raise the profile of the destination, by packaging and developing products and experiences that appeal to the MICE market and will increase length of stay and spend.

Methodology and Sample

Data was collected with the use of an online survey sent out to DMCs and buyers that work primarily in the incentive and business events market. Following data collection, any duplicates and test submissions were removed for consistency and accuracy purposes, which resulted in a total sample size of 22 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.

Looking at the type of respondents, findings show that a significant proportion classified themselves as event planners or venue finder agencies, followed by 27% classing themselves as DMCs. In terms of type of travel, almost all organisations operated in the corporate/business events market (96%). Organisations were also asked to specify which industries clients are from, and as seen in figure 2 responses were evenly spread, with the exception of the manufacturing industry, which was selected by the largest proportion of respondents. Furthermore, findings show that the manufacturing and creative and digital sector emerged as the two most active sectors.

Online survey

22 Responses

10-15 minutes to complete

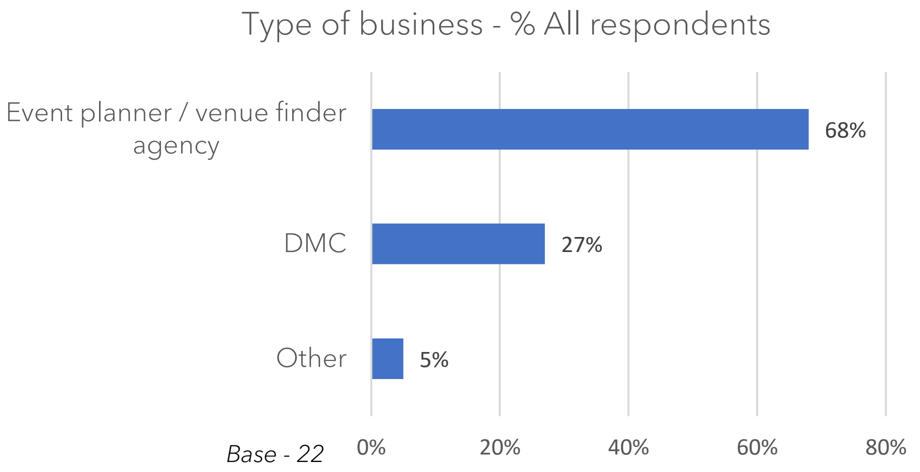


Figure 1: Graph showing % of types of business

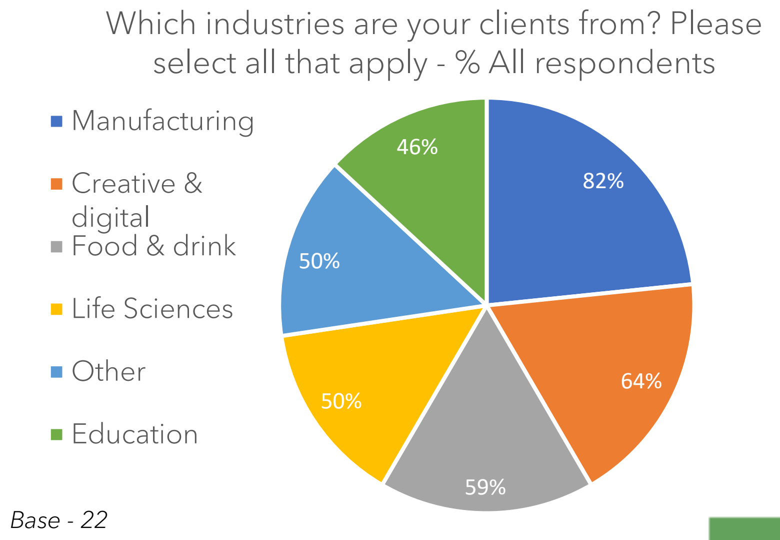


Figure 2: Graph showing which industries clients are from

Kent MICE survey

KEY FINDINGS

This survey aimed to gather insights from DMCs and buyers that work primarily in the incentive and business events market, to establish what products are in demand and what businesses need to do in order to work with buyers.

27%

Had previously included a Kent product or experience in itineraries

When do business event buyers operate?

Spring	Summer	Autumn	Winter
91%	73%	96%	73%

22

Organisations

Online Survey

Top markets respondents operate in

1. The UK
2. Germany
3. The Netherlands & France

77%

Consider sustainability when contracting

73%

Would consider including Kent as part of an multi-destination itinerary with the largest proportion selecting London (55%)

Business requirements for working with buyers

1. Products available to book in advance
2. Factor in between a 6-15% commission rate to pricing structure
3. Willing to offer a flexible cancellation policy due to COVID-19
4. Content such as floor plans, images and editoral/copy

82% of business events buyers consider accessibility when contracting

Formats of events being requested- New enquiries

Hybrid Conferences

Meetings with incentive and extra-curricular activities

New enquiries most predominantly from the **creative & digital sector**

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

Top supplementary provider recommendations requested

77% Transport providers

73% Accommodation providers

68% Team building activity providers

There is a need for venues & providers to develop **strong relationships** with key suppliers

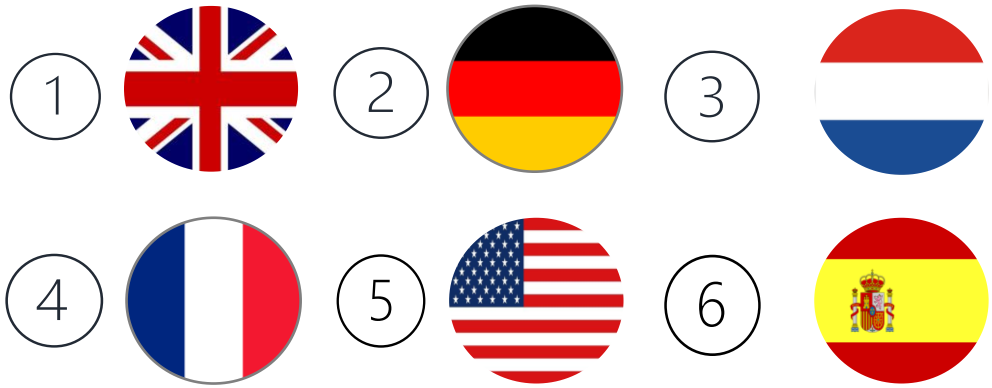
64% stated they would be happy with a virtual fam trip

Product themes of interest

1. Wellness & Wellbeing
2. Culture
3. Food and Drink

Markets

The survey then asked respondents what markets they operate in, and instructed them to select all that applied. The graph in figure 3, displays the top 12 selected markets, with findings showing that the majority of organisations operated in the UK, with **86%** of respondents selecting this. This was then followed by near European countries including, Germany **(68%)**, the Netherlands **(64%)** and France **(64%)**.



However, overall findings show that respondents operate in a range of markets, across various continents. Subsequently, findings show that activity in domestic and near European markets can be utilised and built upon by businesses in Kent to attract delegates and incentive groups.

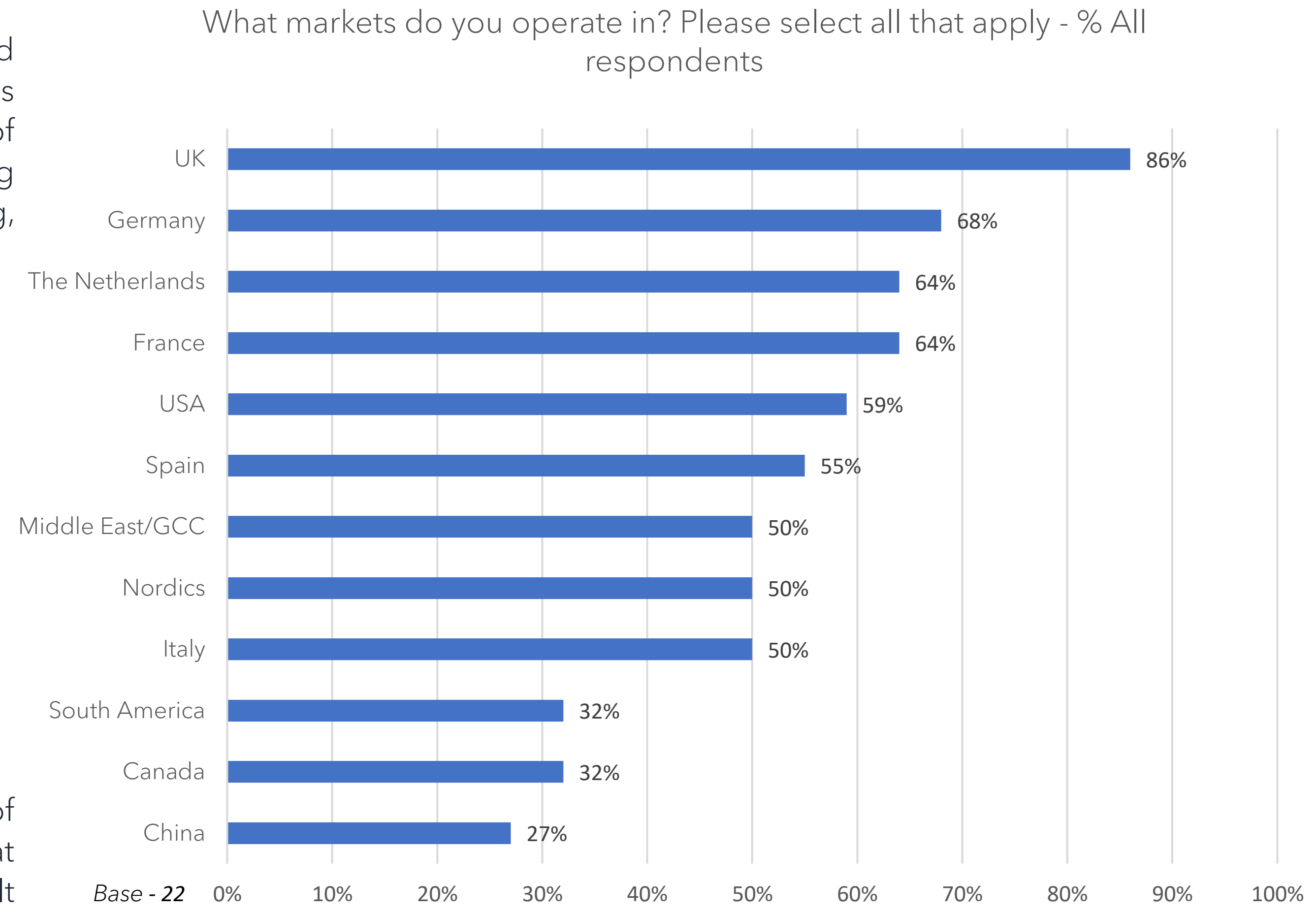


Figure 3: Graph showing % of respondents and markets their business operates in

Types of Events

Following this, respondents were asked what type of events they generally organise, to gain further insight into company operations. With the exception of FIT, exhibitions and trade shows, all types of events were selected by the majority of organisations, showing their diverse offering within the MICE sector.

However, findings do show that conferences/conventions or congress with up to 250 delegates and meetings with 20+ delegates were the most frequently selected, with **86%** for both options. This was then followed by meetings on a smaller scale **(77%)**, involving up to 20 delegates.

Incentive and team building groups were also commonly selected, including those with 100+ delegates and those with 25-100 **(both 73%)**. With larger conferences (between 250-750 delegates) also selected by **73%** of respondents.

Events around training and development also emerged strongly with **64%**, and as businesses are always looking to advance skills within their team, this presents an opportunity, particularly post-COVID where businesses may have experienced changes in their workforce and business strategy.

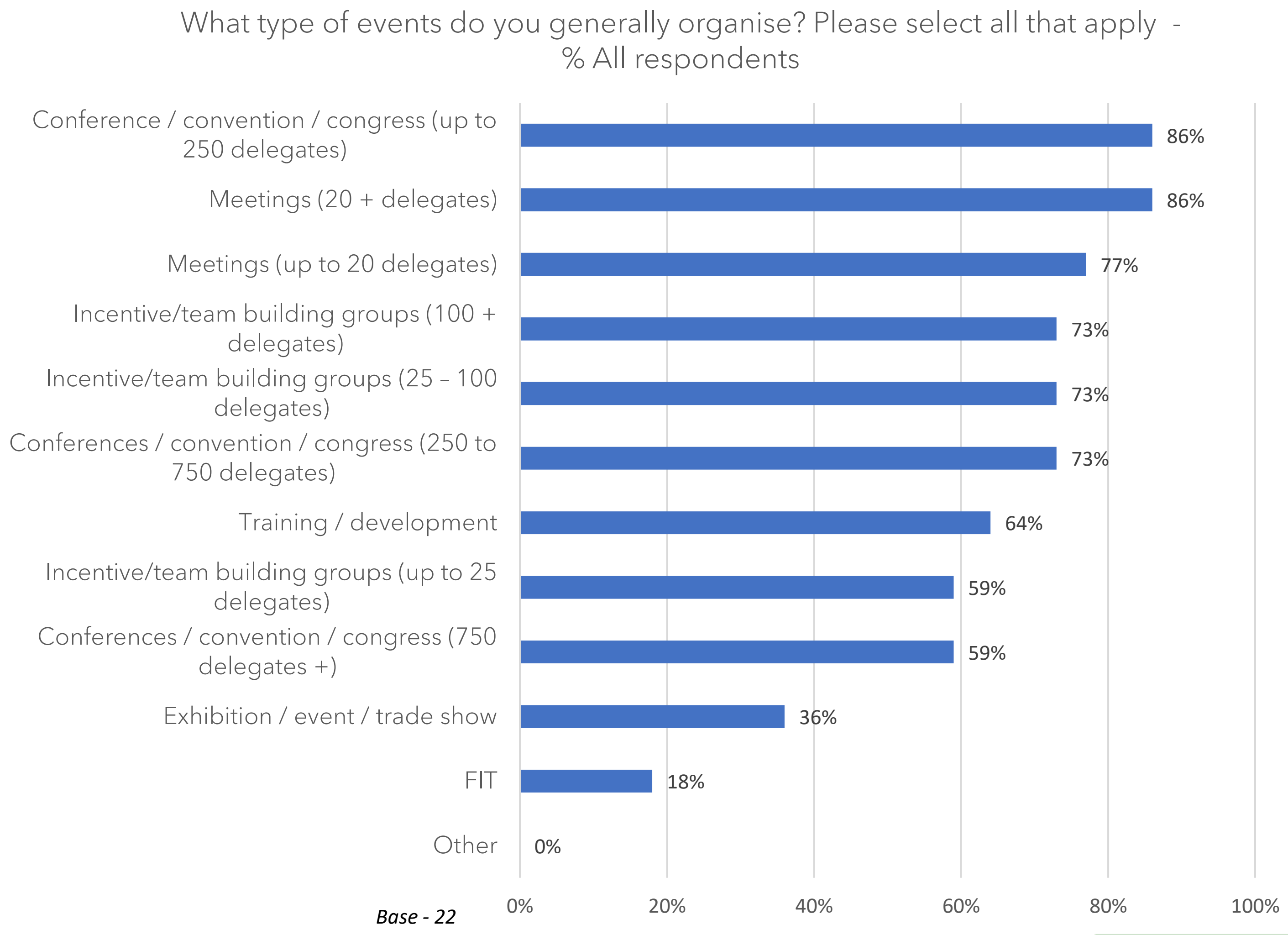


Figure 4: Graph showing % of respondents and what type of events they organise

Popular Types of Incentive/Extra-curricular Activities

The survey then looked to gain an insight into how businesses were operating prior to the COVID-19 pandemic. This involved firstly asking respondents about their most popular types of incentive/extra-curricular activities. Findings show that pre-COVID, immersive experiences were most popular, being selected by 82%. This was then followed by 77% selecting food and drink tastings, which together show that there was a demand for experiential activities and authentic local food and drink. Alongside this, private guided tours also emerged strongly, being selected by more than half of respondents (59%). This included tours around sites of interest such as historic houses and cathedrals. Other activities also included sightseeing tours (36%) and walking and cycling trails (32%). Overall, results show that highlighting and developing unique and immersive experiences that involve locally authentic and one-off aspects will have a strong appeal to the incentive market.

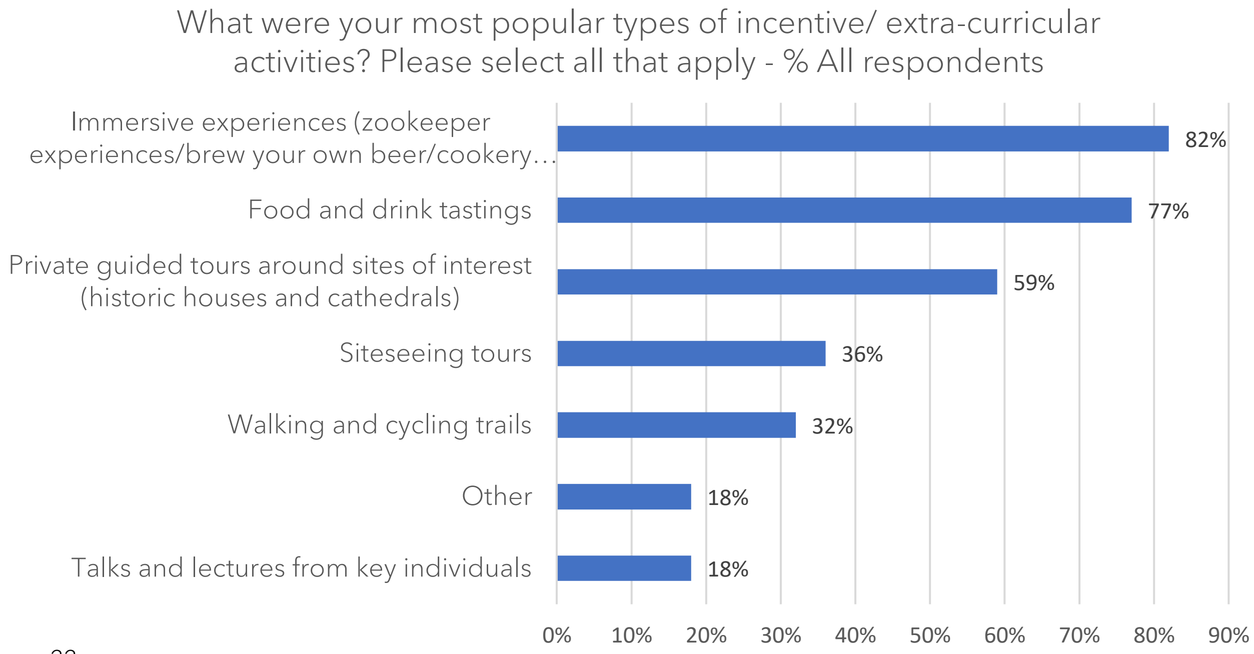


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Figure 5: Graph showing responses on most popular types of activities

Rising Trends

Following this, respondents were asked if they were seeing a rise in any trends or types of experiences requested pre-COVID-19. Of the 46% that stated they were, there was an overall theme around requests for immersive, bespoke and meaningful experiences, that they wouldn't normally do individually. Responses also show that particular customers were requesting more exclusive and special activities, that are both memorable and Instagrammable. A number of organisations also cited that their customers favoured experiences that have an end product, such as cookery or painting. Other comments included a rise in requests for virtual experiences, those that incorporate sustainability and a demand among overseas customers for trips to manor houses and the English countryside. Although prior to the pandemic, the demand for experiential activities will most likely continue to grow as people continue to seek out experiences that allow them to learn, feel positively changed and create memories.

Multi-Destination Trips & Kent Products

Looking at trip characteristics, respondents were asked if they have previously included a Kent product or experience in itineraries or programmes. Findings show that only **27%** of organisations had included Kent, with examples including destinations such as Canterbury, visits to well-known attractions such as Leeds and Hever Castle, Shepherd Neame and Port Lympne Hotel and Reserve. Alongside these examples, other products included visits to vineyards, breweries and garden tours. These findings highlight organisations' current interest in more well-known, larger Kent attractions, alongside the county's strong outdoor and rural offering.

Of those that haven't previously included Kent, reasons included the issue of rising competition from other destinations and a lack of requests from clients. Results show that the inclusion of Kent in programmes and itineraries can certainly be built upon and that there is a need to increase the awareness of existing products and experiences that would appeal to the incentive market. Therefore, it will be essential to develop new experiences that are unique to the region that can be offered to DMCs and buyers to include in activity. The survey then asked if organisations had previously organised any multi-destination incentive trips prior to COVID-19, with findings showing that **55%** had, while the remaining **46%** stated they had not.

Following this, the survey asked if organisations would consider including Kent as part of a multi-destination itinerary, in conjunction with a list of destinations provided. As seen in figure 6, only **27%** stated they would not consider this, with the largest proportion selecting London **(55%)**, mostly likely due to Kent's close proximity to the capital. This was then followed by **32%** selecting that they would consider including Kent as part of a mulit-destination itinerary with Brighton and other areas in Sussex. Although the percentage of organisations that have previously engaged with Kent products was just under a third, interest to include the county with other destinations presents an opportunity to increase this.

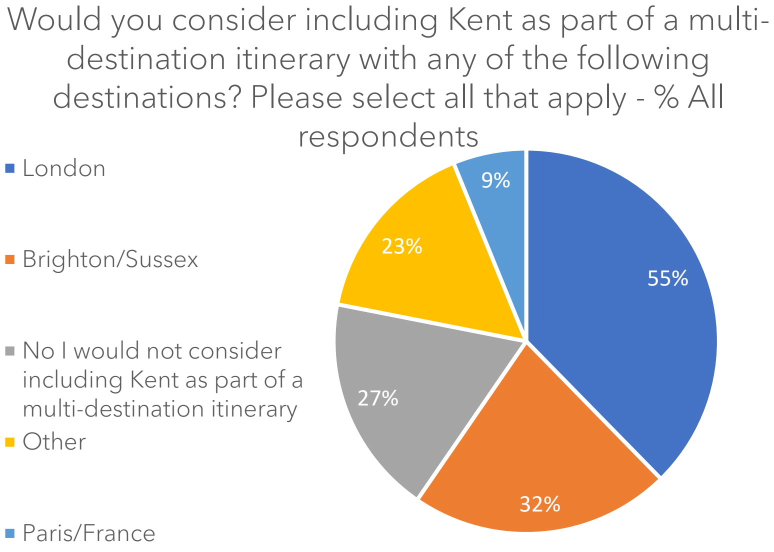

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Figure 6: Graph showing destinations that respondents would consider including Kent with part as part of a multi-destination trip

New Markets & Enquiries

As travel habits are changing clients may start to request different types of experiences and destinations, therefore the survey looked to understand business activity and requests received post-COVID. When asked about intentions to target new markets post COVID-19, **55%** stated they were not looking to do this as part of their activity, although this was closely followed by **46%** stating they are looking at additional client markets. And when asked what these markets were, responses included domestically in the UK including London and other near European countries such as Germany. Several organisations also cited that they are beginning to advance further into the virtual events market, most likely due to progression in VR and the restrictions and health concerns brought about by the pandemic.

Looking to future travel, the majority **(64%)** of respondents stated they had started to receive new enquires, for 2021, 2022 and beyond. And when looking in more detail at the types of enquiries received, findings show that all respondents have received corporate enquires, followed by those from associations and 'other' **(both 21%)**. Other types of clients included charities and private leisure groups. Findings also show that a significant proportion of enquiries **(71%)** came from the creative and digital sector, followed by 'other' and the manufacturing industry **(both 50%)**, with 'other' industries including associations, law, finance and training companies. Results show that most predominantly, requests were for a mix of both high end and good value types of experiences, with **86%** of respondents selecting this. This was then followed by **43%** having received enquiries for more high-end and luxury experiences. Overall, results show that the creative and digital sector is showing the most activity in terms of new enquiries, presenting an opportunity to tap into this industry and demand. And in terms of types of experiences, findings indicate that businesses and venues should look at both good value and high-end experiences, although overall there is certainly a focus on more luxury experiences.

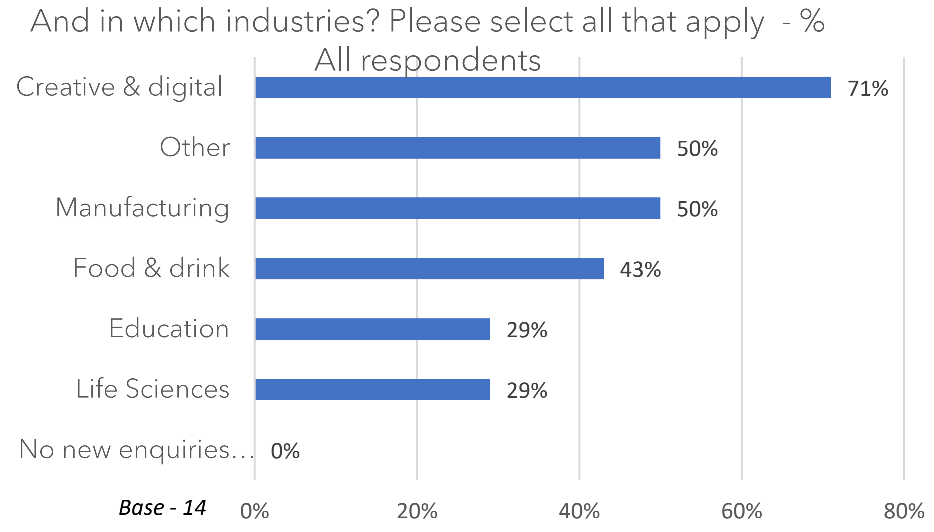


Figure 7: Graph showing new enquiries by industry

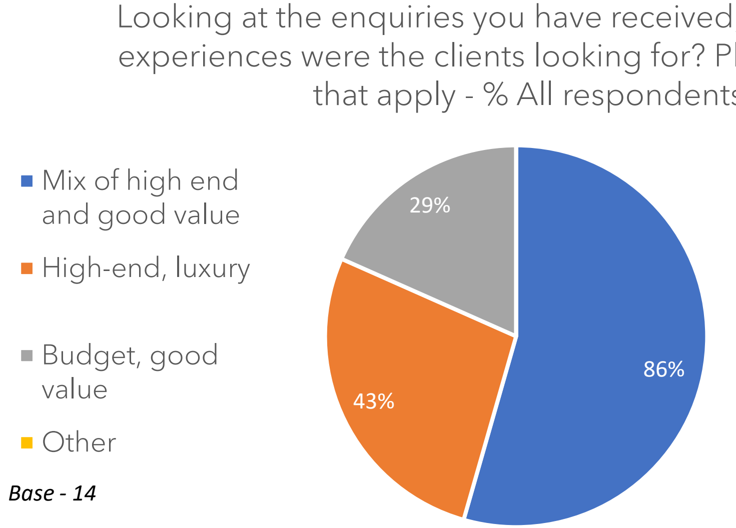


Figure 8: Graph showing what types of experiences clients are enquiring about

Looking at enquires received in more depth, the survey asked organisations what formats are being requested. Findings show that the largest proportion of enquiries received were for either hybrid conferences or meetings with incentive or extra-curricular activities, with both formats being selected by 43% of respondents. This was then followed by team building and incentive groups, alongside both meetings and conferences without incentive activities (all 36%). While conferences with incentive or extra curricular activities were only selected by 21% of respondents.

When it came to the inclusion of incentive or extra-curricular activities, these were seen most predominantly among meetings as opposed to conferences. However, overall enquiries received by organisations did vary by format, with most options seeing interest. And formats such as team building, incentive groups and those that include incentive activities, highlight an opportunity to not only develop experiences and products that would cater for these markets but also to raise the awareness among DMCs and buyers of the existing product offering that may appeal.

Alongside this, for those organisations that specified they had received requests for hybrid conferences, the survey asked them to specify what elements of this will be delivered virtually. Findings show that the majority of respondents stated that all elements of hybrid conferences would be delivered virtually, including presentations, team building, speaker sessions and breakouts. However, one particular response stated that facilitators and key speakers would be on site but all delegates would be virtual. Furthermore, these findings highlight the growing importance of virtual events alongside the assumed need for technology and systems to be in place in order to offer meetings or conferences or even team building events in this format. Therefore, this should be an area that venues look to develop if not already in place.

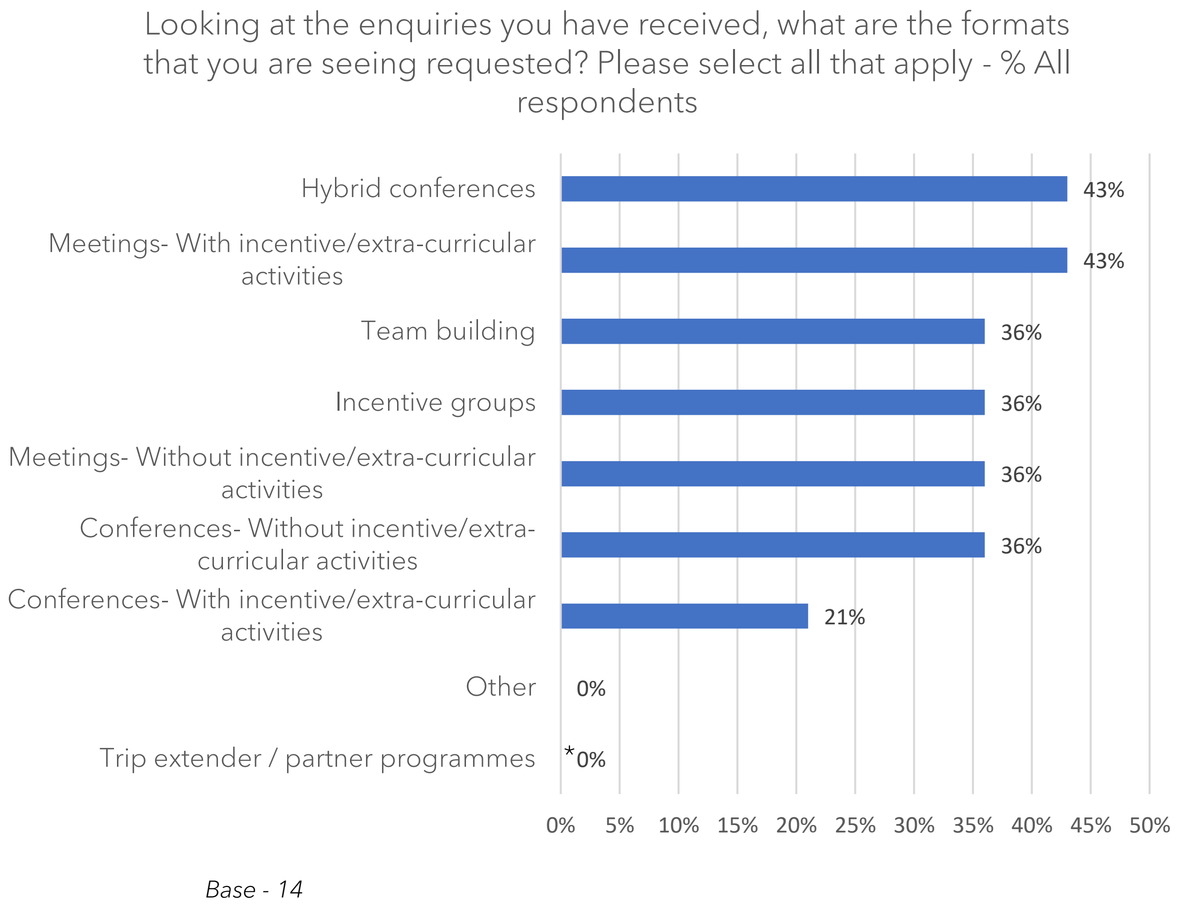
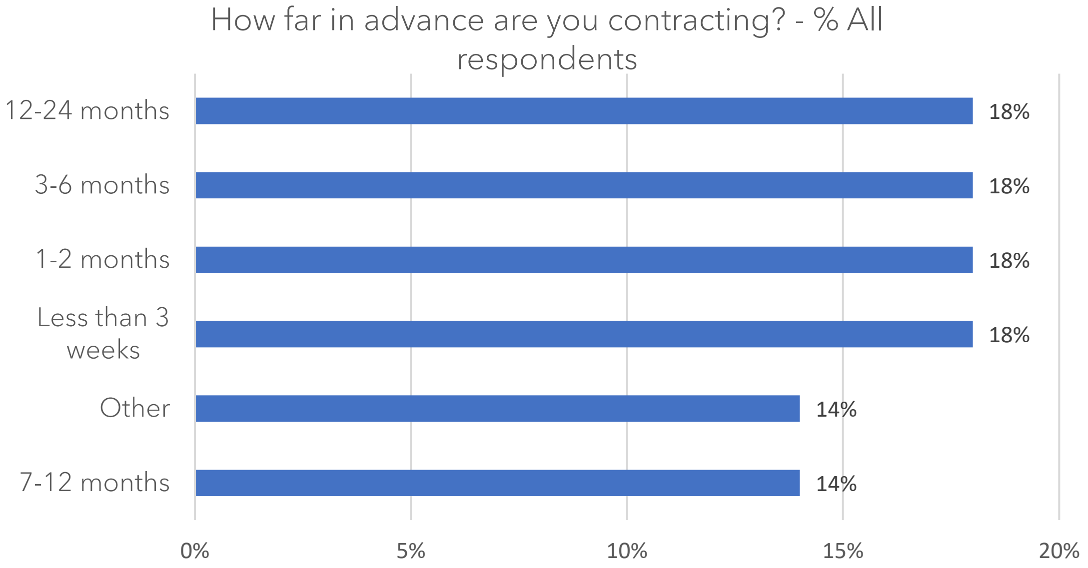


Figure 9: Graph showing what types of experiences by format

**Trip extenders/partner programmes would more than likely be organised in conjunction with a larger conference or meeting so enquiries including these may have been included with Conferences & Meetings with incentive/extra-curricular activities.*

Contracting Timescales & Commission Levels



Base - 22 *Figure 10: Graph showing how far in advance respondents are contracting*

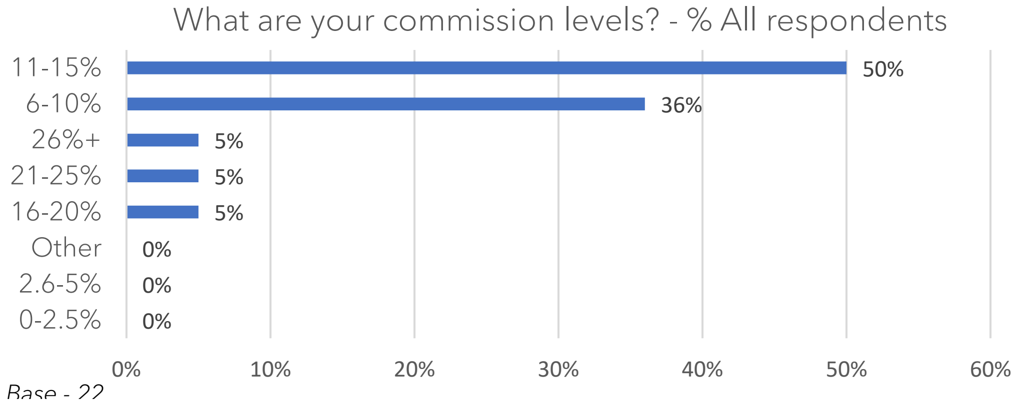


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Figure 11: Graph % of respondents and the commission levels they require

To help Kent businesses prepare to work with DMCs and buyers, the survey asked respondents about the commission levels they look for, alongside timeframes around contracting. Through gaining these insights, Kent businesses can gain a more focused understanding into the contracting process, which will help them to prepare products and experiences to meet requirements.

Firstly, findings show that when it came to timescales around contracting, results were fairly evenly spread, as shown in the figure 10. However, overall results show that organisations are looking to contract either well in advance between 12-24 months prior to the event or closer to the time varying between 6 months to 3 weeks prior.

Looking at responses around commission levels, findings show that the largest proportion of organisations **(50%)** stated they work to a 11-15% commission rate, followed by 6-10% **(36%).**

Overall, these insights indicate that Kent businesses looking to work with the MICE sector should ensure packages and products are available and showcased in advance, to ensure they appeal to both those contracting 24 months prior and those looking to do this nearer the time of the event. In addition to this, businesses should use insights on commission levels previously mentioned to ensure this is aligned with their pricing structure.

Cancellation Policies & Requirements

Organisations were then asked to specify if they have any specific cancelation policies or requirements, with the below diagram displaying any common themes identified, alongside examples of comments provided. Echoing findings from the EXPERIENCE Kent Travel Trade survey report, organisations highlighted the need for cancellations to be as flexible as possible due to COVID-19 restrictions and the uncertainty surrounding this. Organisations also stressed the need for businesses to have a COVID-19 cancellation policy in place, and for this to include flexibility and force majeure. Other responses given centred on policies and requirements being highly dependent on the contracted venue and on individual client needs. And when looking at more specific cancellation timeframes, these included one month free cancellation and a 25% charge up to two weeks before the event. In all, these findings demonstrate the importance of ensuring businesses have a COVID-19 cancellation policy in place and are able to be as flexible as possible, which should also be clearly conveyed to buyers.

Dependent on client and venue

"Depends on group size, but generally we apply full charges if the group is cancelled within a month of the date if the money has been received"

"Depends on suppliers terms and conditions, we pass them onto our clients standard hotel/venue t's and c's unless its a specific training course stream and then usually 45 days no canx"

As flexible and negotiable as possible due to COVID-19

"Even with late contracting, clients are still looking for flexibility in case of last-minute cancellation / postponement"

"All must have a COVID-19 cancellation policy in place"

Cancellation between three and four weeks prior to event

"These vary by client but, overall, clients are looking for long-term provisional holds with confirmation / contracting not taking place until around 3 to 4 weeks prior to the event"

"1 Month free Cancellation of the whole group, 25% up to 2 weeks prior"

Seasonality

The survey then asked respondents to specify what time of year their events generally take place, in order to gauge what seasons are most popular and those that may not receive as much business. As the topic of seasonality is highly embedded in the aims and objectives of the wider project, by gaining an insight into the seasonality of the MICE market, findings can be used to help inform the development of products and experiences out of season.

Findings show that activity was fairly evenly distributed throughout all four seasons, with each seeing at least **73%** of business. As shown below, the season with the highest activity was autumn with **96%,** closely followed by spring, with **91%** of organisations having held events at this time. Although, both summer and winter also saw a high level of activity **(both 73%)**, when linking this interest with development of off-season products and experiences, findings certainly show support of this activity with the two most busiest seasons for this market falling between October and March.

Overall, findings show the potential value the MICE market can bring to the Kent visitor economy, and more specifically to venues and local businesses offering activities and experiences that could be incorporated as part of a package or multi-destination itinerary. Furthermore, the appeal of the sector throughout the year can help to extend the season for many businesses that see a large concentration of their activity in the summer months, and by tapping into this market they can generate business on a more year-round basis and increase spend.

	Spring	Summer	Autumn	Winter
Seasonal Interest	91%	73%	96%	73%

Supplementary Providers & Recommendations

What are the supplementary providers that you would require recommendations for? Please select all that apply - % All respondents

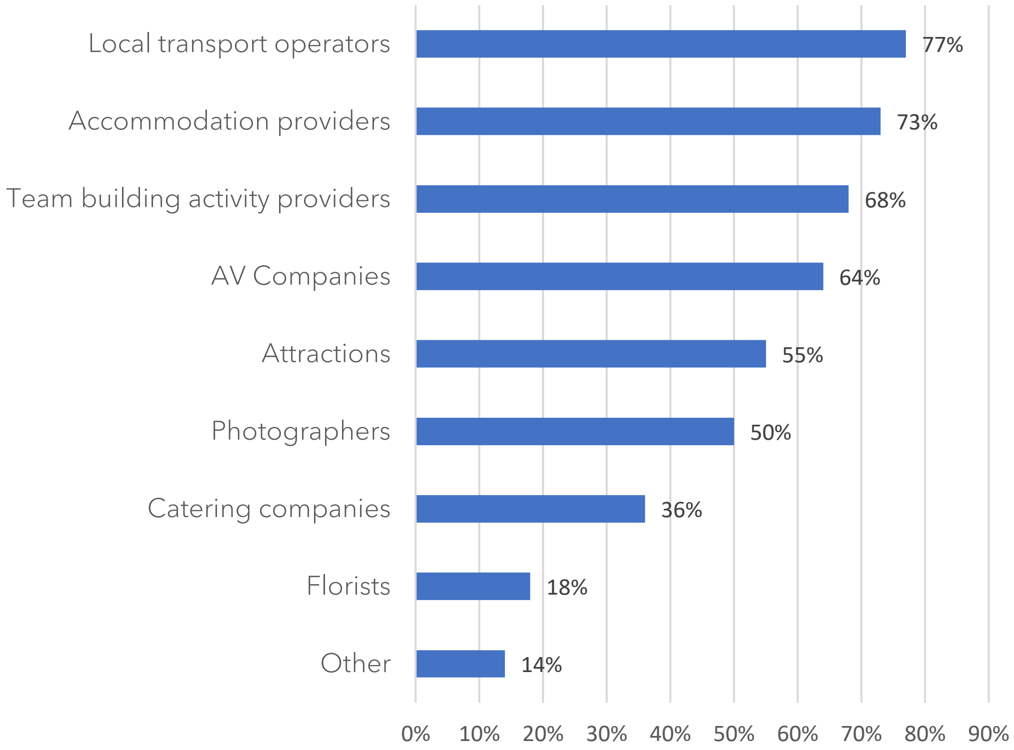

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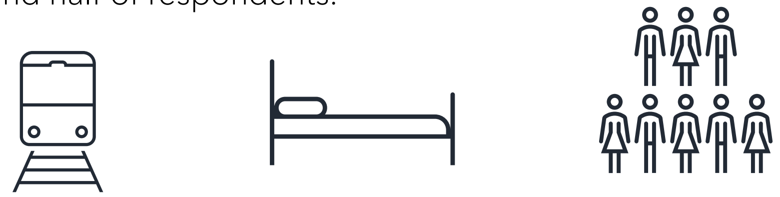
Figure 12: Graph showing % of recommendations needed for supplementary providers

Organisations were then asked what supplementary providers they would require recommendations for. As shown in figures 12, the largest proportion of respondents require recommendations for local transport operators (**77%**), followed by accommodation providers (**73%**). Other areas commonly selected included team building activity providers and AV companies (**68%** and **64%** respectively). However, other areas such as recommendations for attractions and photographers were still selected by around half of respondents.



Local transport operators
77%

Accommodation providers
73%

Team building activity providers
68%

Overall, results show that buyers are looking for quality recommendations and information on local transport, accommodation and activity providers. Therefore this represents an opportunity for Kent hotels, transport providers and those offering experiential activities to be highlighted and showcased to fulfil these requirements and attract additional buyers to the county. Findings also highlight the importance of selling venues/activities providers as part of the wider destination offering and that there is a need for these venues and providers to develop strong relationships with key suppliers.

Sustainability & Acessibility

To understand the importance of other areas to buyers, respondents were also asked if they consider sustainability or carbon-footprints when contracting. Results show that sustainability is an important factor among this market with 77% stating they do consider this when working with suppliers. And when comparing this sentiment to the results of the EXPERIENCE Kent Travel Trade survey report, those working in the MICE sector displayed a much higher consideration for sustainability. These respondents were then asked what they would generally expect in terms of sustainability, with many organisations stating they like to include elements that support local businesses and are as eco-friendly as possible.

Respondents also expressed a preference for working with local suppliers to source food and drink and activities that involve food tastings in particular. Overall, comments illustrate a preference among organisations for working with suppliers that are themselves involved in sustainable practices, such as zero waste and other eco-friendly initiatives. And of those that stated they do not consider sustainability when contracting, when asked why this was, generally respondents stated this was due to a lack of requests from clients.

Respondents were also asked if they consider accessibility when contracting an experience. Results show again that this is an important consideration, with 82% stating they look at accessibility when contracting a venue or supplier. And when asked why this was, respondents cited that in doing so it enhances the delegate experience, and that ease of access and is something that is frequently requested. Alongside this, several respondents also stated that this is very much dependent on the client but that in general they always aim to make events appropriate for all attendees and to be inclusive. Overall, findings indicate that both accessibility and sustainability are important factors for buyers and show the importance and benefit of incorporating these, and that Kent businesses and suppliers should look to incorporate these themselves and showcase them to potential buyers.

Do you consider sustainability/carbon-footprints when contracting?
Yes 77% No 23%

Do you consider accessibility when contracting an experience?
Yes 82% No 18%

Content & Fam Trips

Moving onto other requirements, organisations were then asked if they require any content from suppliers, alongside a fam trip to view and experience the venue themselves. Findings initially showed that when it came to content required from suppliers to help build client proposals, the most important aspect was the availability of floor plans selected by **82%** of respondents. This was then followed by **77%** selecting that they require images and photos from suppliers, which would inevitably allow them to visually showcase the venue or experience effectively to their clients. Other content required included editorial and copy **(46%)** alongside virtual tours **(41%)** and video content **(32%)**. Respondents were then asked if they require a fam trip prior to the event, with findings showing that **64%** stated they would, with the remaining **36%** stating they would not require this. And of those that require a fam trip the survey asked if they would be happy for this to be delivered virtually, which may pose various benefits around ease of arrangement and COVID-19 restrictions permitting.

Results show that a significant proportion of organisations stated they would be happy to participate in a virtual fam trip **(64%)**, with a number of respondents stating this would need to include a walkthrough of event spaces and that ideally this would be as immersive as possible and give a good idea of what the client should expect from the experience. Other respondents stated that ideally a virtual fam trip would then be followed by one in person near to the time of the event itself. Overall, these results show the importance of ensuring floor plans and other content such as images and copy are readily available to ensure Kent venues and products are competitive and attractive to buyers and clients. Venues and suppliers should also look at the use of virtual fam trips, which may extend reach to additional buyers and can help avoid barriers such as distance and changing COVID-19 restrictions.

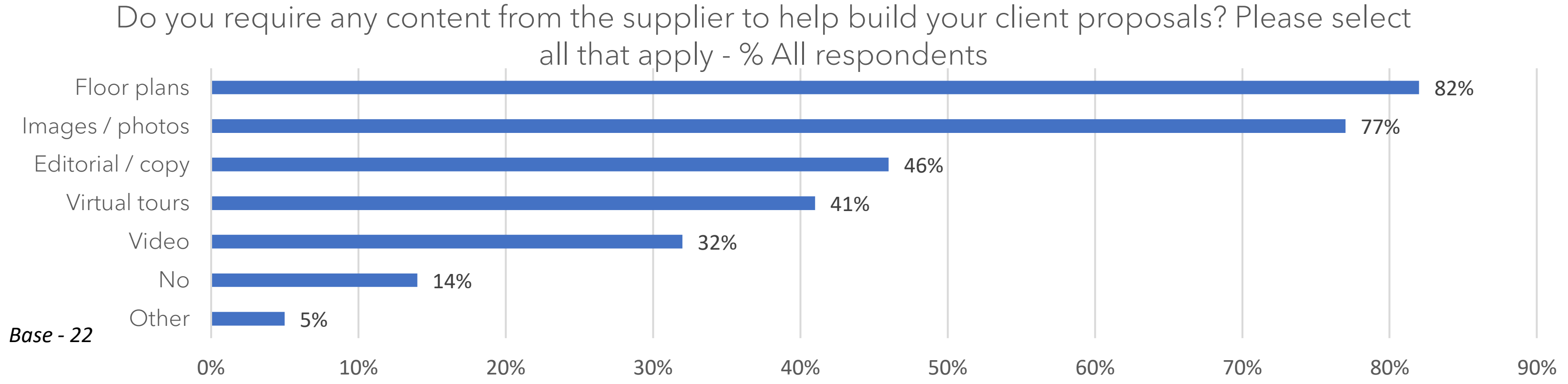
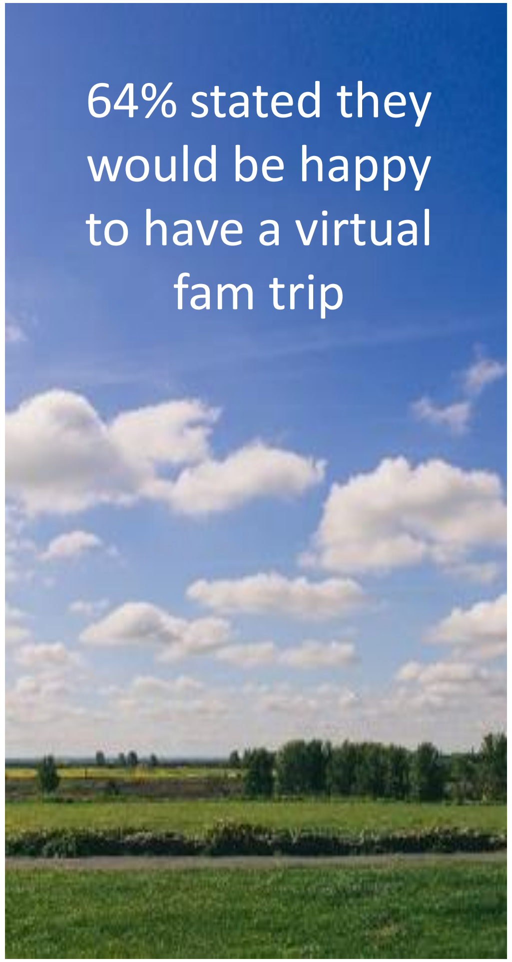


Figure 13: Graph showing % of respondents that require various content from suppliers



Interest in Product Themes

In order to assess the demand for various products, the survey then asked respondents whether or not they would be interested in contracting products around various themes from a list provided if these were to be developed. Findings show that the most popular product theme was wellness and wellbeing with **77%** of respondents selecting this. Following this, the next most popular activities included both culture **(68%)** and food and drink (**64%). A**nd although not as high as the previously mentioned themes, other areas such as landscapes, nature and outdoor activities, creative industries such as film, television and music, and eco-tourism were still selected by over half of all respondents (all **55%).**

Findings show a preference towards products surrounding wellness and wellbeing in particular, which also supports national trends around the increasing need to prioritise wellbeing and health and the demand for experiences that involve learning and self-improvement. And when comparing this to findings from the EXPERIENCE Kent Travel Trade survey report, the MICE sector displayed a higher level of interest in wellness activities, most probably due to the appeal to the incentive market. Furthermore, this highlights the opportunity for experiences that centre on wellness and learning to be developed and offered to buyers, as this is clearly an area that appeals strongly. Alongside this, interest in areas such as culture and food and drink also present opportunities to create and raise the awareness of experiences or activities that include local produce, tastings and vineyard visits that allow clients to be immersed in local culture.

Looking at seasonality, due to the even spread of business throughout the year, experiences and activities for this market should not just be concentrated in certain months. This may include offering products that can be delivered both indoors and outdoors to accommodate different times of the year. But overall this market presents a significant opportunity for businesses to extend more seasonal tourism in the summer months into October to March.

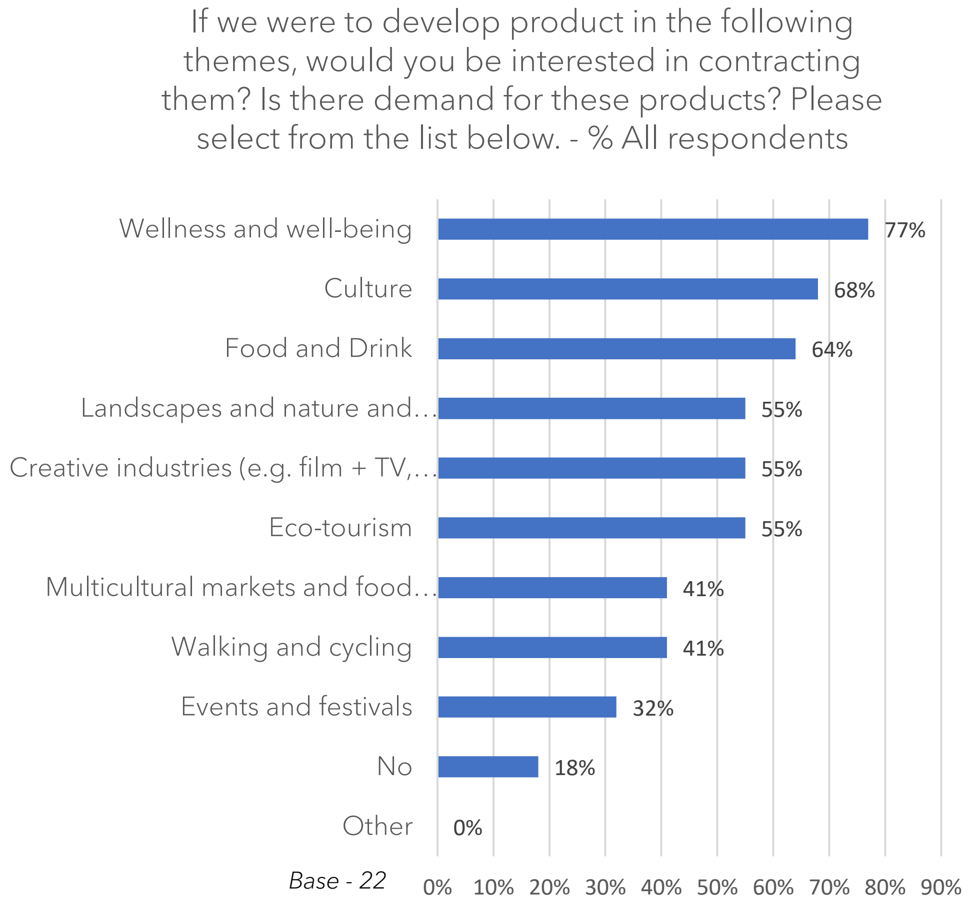


Figure 14: Graph showing % of respondents that would be interested in various product themes

Barriers

To assess any challenges, the survey asked respondents if there were any barriers they had to expanding more into Kent. Results show that the largest proportion of respondents stated they did not know **(46%)**, which was then followed by **32%** selecting 'other'. And when looking at reasons given this included a lack of demand, and competition from other destinations, in addition to a lack of awareness of what the area had to offer and a lack of knowledge of accommodation options and unique suppliers. Concerns around accommodation were also reinforced by other respondents, with the third most frequently selected barrier being lack of suitable accommodation options. Concerns around accommodation were also raised in the EXPERIENCE Kent Travel Trade survey report, which together highlight the increasing need for quality accommodation in the county, to ensure Kent is an attractive destination for both the trade and MICE sector.

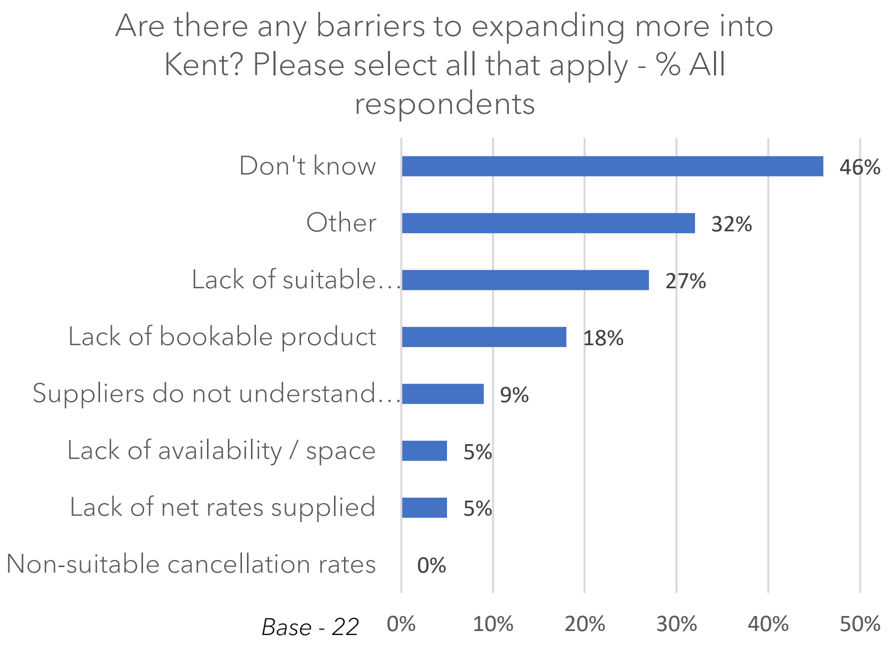


Figure 15: Graph showing the barriers to expanding more into more

Examples of UK Products and Destinations

Finally, the survey asked respondents to provide an example of a UK product or destination that provides quality experiences and services. Looking at responses given, one of the main themes that emerged centred on the food and drink offering, this included examples such as the Bombay Sapphire distillery and vineyard visits involving food and wine tastings presented by the owner. Alongside this, destinations such as London and Scotland were cited by a number of respondents, and in the case of Scotland this included activities that showcase Scottish traditions and produce such as visits to tartan weaving mills, tours of distilleries and private visits to castles. Other destinations also included Northern Ireland, Brighton, Birmingham and Manchester, which alongside Scotland are well-established MICE destinations with larger conference facilities. These findings show the strong appeal of hands-on activities and those that incorporate local traditions, which also mirrors findings from respondents around rising trends prior to COVID-19. Although, due to competition from other destinations it will be vital that Kent's unique and one-off experiences are showcased to this market around areas of interest previously identified.

Key Findings & Recommendations

Demand for experiential activities that are immersive and authentic will most likely continue to grow post-COVID. Themes and areas that appeal strongly include bespoke and meaningful experiences, and those that have a more exclusive feel. This is driven by the demand for memorable and one-off experiences, that delegates may not do usually while at home or on leisure trips.

Findings show that clients often look for experiences and activities that have an end product such as cookery or painting, that are more hands-on. For example, this could include food and drink tastings and those that incorporate local produce and traditions.

An area which shows particular value are activities and experiences centred on wellness and wellbeing, which also supports the national trend around a growing desire for experiences that promote learning and self-improvement. And due to COVID-19 and increasing corporate responsibility in this area, there may be a bigger emphasis and priority on health and wellbeing. Subsequently, employers and other clients within the MICE sector may look to seek out experiences and activities that fulfil this.

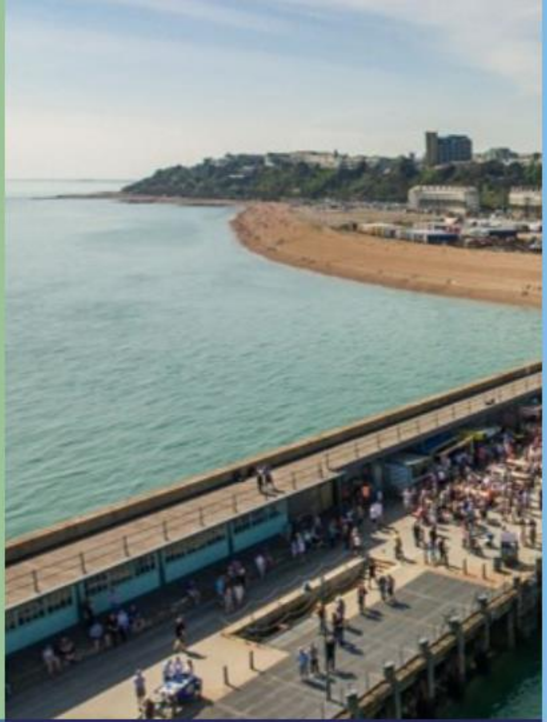
Reasons for having not previously included Kent in itineraries and programmes, included the issue of rising competition from other destinations and a lack of requests from clients.

This shows that there is a need to increase the awareness and demand for business events in the county and to promote Kent as a business events destination and for businesses to work on a joined-up destination approach.

To aid this, it will also be vital that Kent businesses look to highlight and develop unique and one-off experiences that can be showcased and packaged to allow the county to stand out from their competitors.

Key Findings & Recommendations

Events around training and development may see a growth in demand, as businesses may look to advance skills within their team, as particularly post-COVID-19 businesses may have experienced changes to their workforce, business model and strategy. Therefore, this represents an opportunity for venues and businesses to cater for this market.



When asked about including Kent as part of a multi-destination itinerary, the most commonly selected destination was London, most probably due to Kent's close proximity to the capital. This was then followed by Brighton and other areas in Sussex. Therefore, experiences could be packaged to sit alongside other activities in these destinations. This presents an opportunity for Kent to attract additional business into the county by working collaboratively with other destinations.

In terms of new enquires, for 2021, 2022 and beyond, overall results show that the creative and digital sector is most active in terms of new requests, perhaps presenting an opportunity to tap into this market and demand.

New enquiries received also indicate that businesses and venues should look at offering both good value and high-end experiences, although overall there is certainly a focus on more luxury and private experiences.

The largest proportion of new enquiries received were for either hybrid conferences or meetings with incentive or extra-curricular activities. And when it came to the inclusion of these activities, these were seen most predominantly alongside meetings as opposed to conferences.

And formats such as team building and incentive groups and activities, highlight an opportunity to not only develop experiences and products but also to raise the awareness among DMCs and buyers of the existing product offering that may appeal to these markets.

Key Findings & Recommendations

Findings show that the majority of respondents stated that hybrid conferences could be delivered virtually, including presentations, team building, speaker sessions and breakouts. Findings also highlight the growing importance of virtual events alongside the assumed need for technology and systems to be in place, in order to offer meetings or conferences or even team building events in this format. Therefore venues should look to develop this if not already in place.

The top three supplementary providers buyers require recommendations for, include local transport, accommodation, and activity providers.

This highlights the need for venues and activity providers to develop relationships with key providers by using promotional tools like case studies that can showcase these relationships.

Findings also highlighted a barrier among buyers around a lack of suitable accommodation options, with these concerns also being raised in the Kent Travel Trade survey report. Together, this highlights the need for the county to develop more high quality accommodation options.

With buyers contracting up to 24 months in advance of the event, businesses should have their commissionable rates prepared. They should also ensure that a commission rate of between 6-15% is considered when developing their pricing structure.

Findings also show the importance of ensuring businesses have a COVID-19 cancellation policy in place and are able to be as flexible as possible.

Both accessibility and sustainability are important factors for buyers and show the importance and benefits of incorporating these. Findings show a preference for supporting local businesses and to make events as carbon neutral and eco-friendly as possible. Local businesses and suppliers should therefore look to incorporate these elements and showcase them to potential buyers.

Results show the importance of ensuring floor plans and other content such as images and copy are readily available, to ensure venues and products are competitive and attractive to clients. Venues and suppliers should also look at the use of virtual fam trips, which may allow access to additional buyers and avoid barriers such as distance and changing COVID-19 restrictions.

Findings demonstrate the value the MICE sector can bring to the visitor economy, particularly due to its appeal all year-round. To facilitate this, venues and suppliers should ensure they are well-equipped to work with buyers. And by offering experiences around areas of interest such as wellness and wellbeing, culture and food and drink, businesses can attract the incentive market and also look to extend delegates' length of stay and spend.

Interest in these areas also links with Kent's key industries, particularly culture and food and drink, which were highlighted as being important themes and are key strengths of the county. This demonstrates that Kent has the product offering buyers are looking for and presents an opportunity to showcase Kent's thriving cultural and food and drink industries through the business events market to drive investment in these industries.

Due to the more even spread of activity throughout the year, experiences should not just be concentrated in certain months and should look to offer products that can be delivered both indoors and outdoors to accommodate for different times of the year and weather conditions. Overall, this shows the value that the MICE market can bring to both venues and to local businesses and can significantly aid towards extending the season for many businesses that see a large concentration of their activity in the summer months. Businesses can therefore look at tapping into this market that operates on a more year-round basis. Furthermore, it will be vital for businesses to adapt and diversify their offering to offer new, appealing and bookable experiences that are suitable for itineraries and customers within the incentive and business events market.

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BUSINESS
GARDEN of ENGLAND

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