VISIT KENT
GARDEN of ENGLAND

BUSINESS BAROMETER

October 2020

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Introduction

We all know how important it is for organisations and destinations to be able to access timely information on the performance of the visitor economy and the factors that may influence it, either positively or negatively. This is what the Business Barometer sets out to do – offering a monthly snapshot of the industry's performance, based on the feedback received from a range of tourism businesses including visitor attractions, visitor information centres, conference and events venues, cross-channel carriers and serviced accommodation providers.

Due to the unprecedented situation with COVID-19 and with many attractions being closed over the last few months, our Business Barometer has been on hold and we have only been able to collect data throughout the months that some level of activity took place, in line with the restrictions.

Data is collected through the use of a short online survey, sent out on a monthly basis, with questions centred on visitor footfall for that particular month and for the same month the previous year. This allows for direct like-for-like comparisons to be made and to ensure the results are based on a reliable and robust sample. For serviced accommodation providers, data is provided by hotel benchmarking company STR Global, who were also awarded the contract to provide serviced accommodation data by VisitEngland. Using this method allows accommodation data to feed into national level studies such as the England Occupancy Survey, consequently allowing the monthly Business Barometer figures to be accurately benchmarked against national level figures.

This report aims to summarise findings from October 2020, looking at the performance of tourism businesses and giving a snapshot of Kent's visitor economy in comparison to October 2019. Alongside this, the report will also look to benchmark against national level figures, where appropriate. We are always actively working to increase the sample of businesses that contribute to the barometer and we would really encourage tourism businesses that do not currently take part to sign-up, as the barometer has proven to be a valuable and timely monitoring tool, with results having been previously used to support decision making, strategic plans and funding applications. We would also like to thank businesses for their ongoing support during this difficult time. The findings from our Business Barometer are valuable not only to help ensure businesses are getting the support they need, but also to help build a strategy for recovery and to measure the ongoing impacts of COVID-19.

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Key findings

- Findings show that the **74%** of attractions that were open saw a decrease of -**41.8%** in footfall compared to October 2019 and that on average, only **67%** of bookings were fulfilled in October 2020. In terms of capacity, the largest proportion of attractions stated that in October 2020 they were operating at a **91-100%** capacity.

- The majority of visitors **(63%)** to attractions originated from Kent. This was followed by domestic visitors from other parts of the UK **(38%).**

- Attractions were also asked if they had received any international visitors during the month of October, with results showing that **39%** stated they had not, and **30%** stated they had, with the remaining attractions selecting 'don't know'. Of those that stated they had received international visitors, they accounted for an average of **3%** of their total footfall.

- Of those attractions that were open, **57%** stated they had experienced a loss in revenue compared to October 2019, with **22%** stating revenue generated was 'better', and **9%** mentioning their revenue was 'about the same'. Attractions were then asked to specify what percentage of revenue they had lost, with findings showing that attractions had lost on average almost half of their revenue (**-44%)** compared to October 2019.

- Looking at the top concerns in relation to COVID-19, the results show that **loss of visitor footfall** and **loss of revenue** were the main worries among attractions **(both 71%),** followed by **loss of key markets,** selected by **52%** of respondents.

- Attractions were then asked what type of support they wanted to receive from Visit Kent and the top choice was around driving visitor footfall **(39%)**

- According to figures from STR Global*, in October 2020 Kent accommodation providers experienced an average occupancy of **60.3%** When comparing this performance with the previous year, Kent serviced accommodation providers saw a decrease of **-24.7%**, in occupancy.

**SOURCE: STR, INC. REPUBLICATION OR OTHER RE-USE OF THIS DATA WITHOUT THE EXPRESS WRITTEN PERMISSION OF STR IS STRICTLY PROHIBITED*

Visit Kent Update: Digital Statistics

October 2020

Digital

Website

63,525 website visits

01:30 minutes average dwell time

1.9 average page views per session

Social Media

49,147 followers

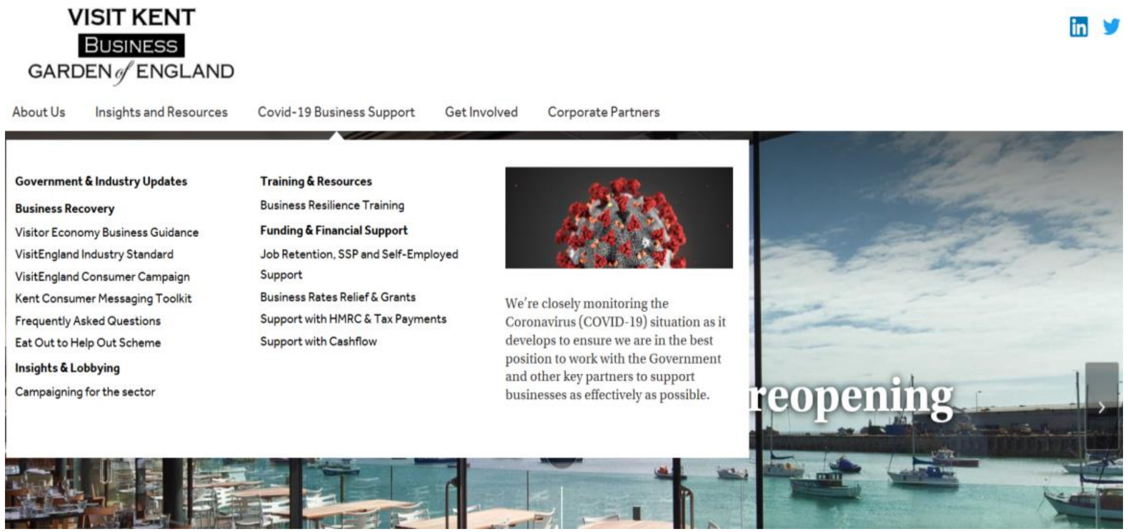
22,783 likes

27,017 followers

Visit Kent Update: B2B Activity & PR

B2B Support and Communications

- On our B2B Website, we have pulled together the latest updates in funding, job retention, hygiene guidelines, online training and webinars and more to support businesses, along with daily summaries from the Government press briefings and announcements.
- The Visit Kent B2B website received a total of **2,693** page views during October 2020, with an average dwell time of **1.48** minutes.
- During October the team sent out a total of **8** dedicated B2B newsletters including the latest Government updates and announcements, our EU-funded Interreg Experience programme and the opportunities open to all Kent tourism businesses within this, details of our upcoming thematic experience development workshops.



PR Activity

- In October, press coverage generated by Visit Kent reached **over 7 million people** and was worth over **£286,000.**
- During this month, the PR team took part in **5** live broadcast interviews, hosted **2** press trips, circulated **2** press releases with media, and assisted **9** media publications with recommendations and information for a range of features and news articles.
- Coverage generated during October was published in a range of publications, including but not limited to the Independent, BBC online, The Sun, Conde Nast Traveller UK and VisitBritain.

PR

Visitor Attractions

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Visitor Attractions

The findings from the October 2020 Business Barometer are based on a smaller sample compared to standard monthly reports, as some attractions were still not open during October. However, the total footfall figures and performance in this report are based on like-for-like data from attractions that were open in October. Findings show that attractions saw a decrease of **-41.8%** in footfall compared to October 2019 and that on average **67%** of bookings were fulfilled in October 2020. And in terms of capacity, the largest proportion of attractions stated that in October 2020 they were operating at a **91-100%** capacity.

Attractions open/closed October 2020

Open	Closed
74%	26%

Visitor numbers October 2019/2020

2019	2020	% change
179,676	104,471	-41.8

- Attractions were asked to estimate the percentage of visitors from various markets. The findings show the majority of visitors to attractions **(63%)** originated from Kent. This was followed by domestic visitors from other parts of the UK **(38%).**
- Attractions were also asked if they had received any international visitors during the month of October, with results showing that **39%** stated they had not and **30%** stated they had, with the remaining attractions selecting 'don't know. Of those that stated they had received international visitors, they accounted for an average of **3%** of their total footfall.
- Of those attractions that were open, **57%** stated they had experienced a loss in revenue compared to October 2019, with **22%** stating revenue generated was 'better' compared to same the period the previous year, and **9%** mentioning that revenue was 'about the same'. Looking at what percentage of revenue they had lost, attractions indicated an average loss of **-44%** of their revenue compared to October 2019.

Contributing factors

1. Attractions predominantly cited that due limited capacity and social distancing in line with COVID-19 restrictions, they received less footfall compared to October 2019.
2. A number of outdoor attractions experienced an increase visitor footfall. This could be due to the lack of consumer confidence visiting indoor attractions.
3. Some attractions experienced a decrease in visitor footfall through not being able to host events due to COVID-19.
4. Attractions also cited that they have had a reduction in visitors compared to October 2019, particularly from overseas and groups.

Visitor Attractions

Performance according to indoor/outdoor based attractions October 2019/2020

Outdoor	Mixed	Indoor
-45%	-47.3%	-48.5%

Performance according to attraction size* October 2019/2020

20,000 or less	20,001- 50,000	50,001 -200,000	Over 200,000
-16.6%	-7.1%	-31.6%	-54%

**based on annual number of visitors*

Performance according to attraction location October 2019/2020

Urban	Rural	Coastal
-61.2%	-3%	-42.7

- Looking at the performance of attractions based on whether they are operating indoors or outdoors, those that were outdoors reported the smallest decrease in footfall (-45%), compared to October 2019. Indoor attractions saw the largest decrease in footfall of -48.5% compared to October 2019.
- The performance of attractions was also looked at in terms of their size. As seen in the table above, the larger attractions were more impacted in terms of performance. Alongside this, findings show that attractions that are free to enter saw a decrease of -18.6%, while attractions that are charging saw a larger decrease of -42.8% compared to October 2019.
- Looking at performance by attraction location, although a significant reduction in footfall was seen across all locations, attractions situated in urban areas saw the largest decrease (-61.2%). These findings reflect the desire to avoid populated areas, in favour of more rural destinations and open spaces, with a similar result shown in September 2020.

Credit: Robby Whitfield

Visitor Attractions – September vs. October 2020

To keep track of attractions' performance, this section will look to compare findings over the last two months. In doing so, it allows us to identify trends and to monitor the ongoing impact of COVID-19. The below stats illustrate some of the key findings month on month.

September vs. October

74% Open | 74% Open

September vs. October

-52.9% In Footfall | -41.8% In Footfall

September vs. October

56% Attractions lost revenue | 57% Attractions lost revenue

September vs. October

56% had no employees on furlough | 65% had no employees on furlough

Concerns around **Loss of revenue** up **+3%** vs. September 2020

Concerns regarding the **loss of key Markets** up **+2%** vs. September 2020

Support needed to **target other markets** up **+14%** vs. September 2020

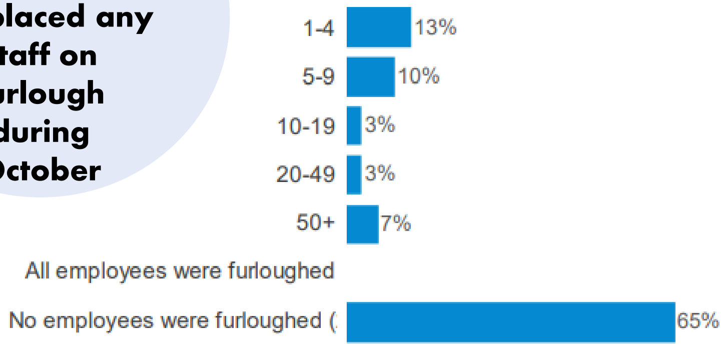
Figures above show % increases of results from the October 2020 data vs. September 2020 from questions on concerns and support needed.

Visitor Attractions

Furloughing of staff

- Attractions were asked if they had placed any employees within their organisation on furlough during October. Findings show that the majority of attractions **(65%)** stated that they had not.
- From the remaining attractions **23%** had placed nine or less employees on furlough as seen the graph below, in addition to **7%** who placed 50+ employees on furlough.

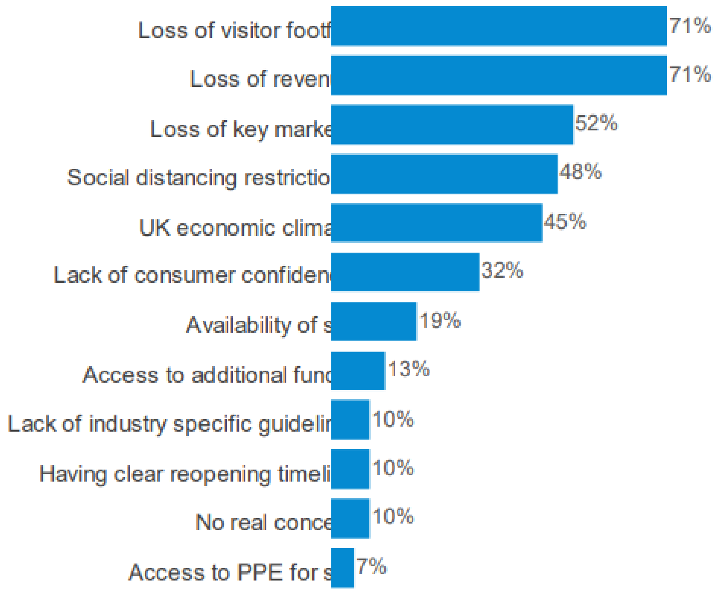
65% of attractions had not placed any staff on furlough during October



Business concerns regarding COVID-19

- Attractions were then asked to select their top five concerns in relation to COVID-19, from the list displayed below, in the graph. The results show that **loss of visitor footfall** and **Loss of revenue** were the top two concerns among attractions **(71%).** Looking at other concerns, attractions also expressed worries around the **loss of key markets (52%)** and **social distancing restrictions (48%).**
- **UK Economic Climate** was the 5th concern amongst attractions **(45%).** This most likely due to the current impact of the pandemic on the UK economy and the uncertainty around BREXIT approaching.

The main concern among attractions in October is loss of footfall

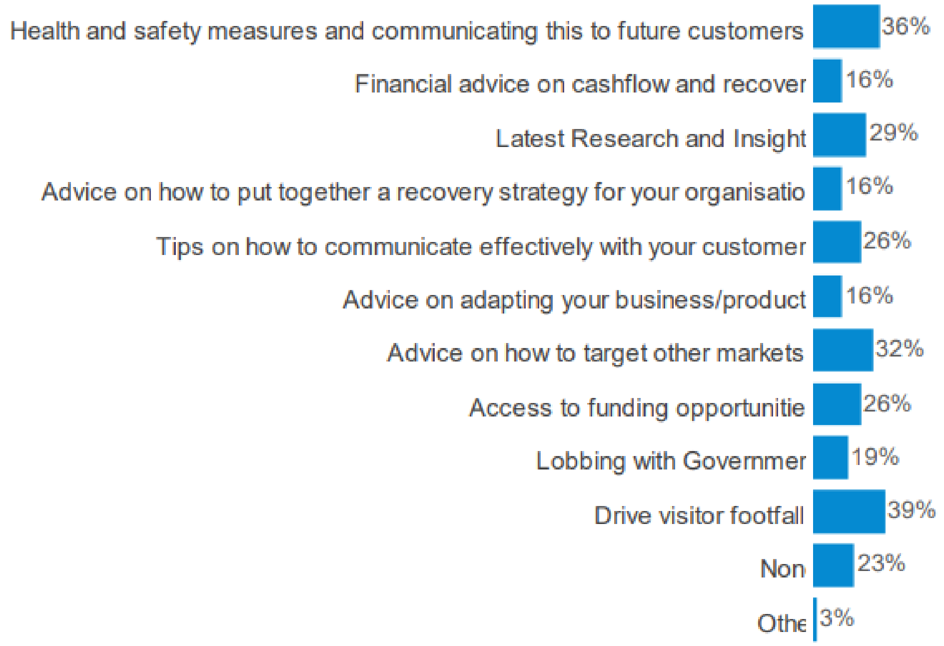


Visitor Attractions

Business support

- Looking at what support businesses want to continue to receive from Visit Kent, the top two sources of support that attractions felt they would benefit from included to **drive visitor footfall (39%)** and **health and safety measure and communicating this to future customers (36%)**. This was then followed by **advice on how to target other markets (32%)** and **latest research and insights (29%).**

- On the B2B Website, we have pulled together the latest updates on funding, job retention, hygiene guidelines, online training, webinars and more to support businesses, along with timely summaries from the Government's press briefings and announcements.



1 Help to drive visitor footfall

2 Health and safety measures and communicating this to future customers

3 Advice on how to target other markets

4 Latest research and insights

5 Accessing funding opportunities & tips on communicating with customers

Kent Accommodation

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Serviced Accommodation

- According to figures from STR Global, Kent accommodation providers experienced an average occupancy of **60.3% in October 2020.** When comparing this performance with the previous year, Kent serviced accommodation providers saw a decrease of **-24.7%**, in occupancy.

Year on year room occupancy comparison (%)

Kent	2019	2020	20/19
Occupancy	80.1%	60.3%	-24.7%

Monthly occupancy 2020 (%)

Kent	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020	June 2020
Occupancy	58.3%	69.7%	38.2%	23.6%	19.5%	29.7%
	July 2020	Aug 2020	Sep 2020	Oct 2020	Nov 2020	Dec 2020
Occupancy	40.8%	64.3%	62.9%	60.3	-	-

Map showing the locations of serviced accommodation providers that contribute monthly to the Kent Business Barometer through STR Global Ltd.

Serviced Accommodation

- According to figures from STR Global, in October 2020, average daily rate saw a **-8.5%** decrease compared to figures recorded in October 2019, with revenue per available room also seeing a decrease **(-31.2%)** compared to the same month last year.

Year on year average daily rate comparison (%)

Kent	2019	2020	19/20
ADR	£53.66	£58.67	-8.5%

Year on year revenue per available room comparison (%)

Kent	2019	2020	19/20
RevPAR	£47.01	£32.37	-31.2%


Credit: David Burke Photography 2013

Other News

Other News

Prompted by the current situation, many research reports have been released in the last few months. Here are some of the great resources that you should review to get a better understanding around consumer confidence, perceptions, attitudes and travel trends, to help your business build a strategy and navigate the impacts of COVID-19.

VisitBritain – How the world views the UK

Report published November 2020

- The UK claimed a record high 2nd place in the Nation Brands Index 2020, ahead of Canada in 3rd. Germany continued to hold 1st place – a position it has held since 2017.
- Looking at the Tourism, the UK held onto the ranking positions from 2019 for historic buildings (5th) and vibrant city life (4th).
- Natural beauty gained three ranking places after losing two in 2019 to claim 23rd place while the aspirational visit if money were no object rose one rank to a record equalling 6th.
- The UK gained two ranks in the overall Culture dimension, losing one rank place for contemporary culture (4th), but jumping two ranks to 3rd for excelling at sport and regaining a rank for cultural heritage (6th).

To view the full report click here

VisitBritain – Latest tourism forecast

Report published December 2020

- **2020 forecast:** VisitBritain's latest central scenario forecast for inbound tourism to the UK in 2020, as of December 11th, is for a decline of 76% in visits to 9.7 million and a decline of 80% in spending to £5.7 billion.
- **2021 forecast:** Central scenario for inbound tourism in 2021 is for 16.9 million visits, up 73% on 2020 but only 41% of the 2019 level; and £9.0 billion to be spent by inbound tourists, up 59% on 2020 but only 32% of the 2019 level.

To view the full report click here

Other News

STR- Hotel benchmarking resources

Hotel benchmarking company STR has published a range of different resources on their website that is continually updated, on performance trends and data, to provide solutions and insights needed to help the industry operate through this difficult time.

These resources include webinars on the impact of COVID-19 on hotel performance in various markets, alongside preliminary data, press releases and social posts.

To view their website click here

Latest consumer sentiment trackers

Tracking consumer sentiment during this unprecedented time provides useful insights into the impact of COVID-19 and monitors consumer behaviour and confidence. VisitEngland's weekly tracker looks to capture domestic intent to take short breaks and holidays both within the U.K. and abroad, with a particular focus around how the current barriers and concerns will affect travel behaviour. The tracker looks at when and where visitors are planning their trips, alongside details including type of accommodation, activities, and the reassurances they seek from the sector.

To view the latest VisitEngland consumer sentiment tracker click here

Other consumer trackers include the one published by BVA BDRC, which offers timely insightful market analysis including lead time for visiting various types of attractions and lead time for going on a UK holiday.

To view the latest BVA BDRC consumer sentiment tracker click here

Glossary

VICs- Visitor Information Centres

CTR- Click through rate

AVE- Advertising Value Equivalent

GTOs- Group Travel Organisers

DMOs- Destination Management Organisations

OP- On par

ADR- Average Daily rate

RevPAR- Revenue per available room

YTD- Year to date

FIT-Free Independent Traveller

Business Barometer Contacts

If you would like to be part of the Business Barometer, or have any questions on its content, please contact

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To view other research resources please visit- www.visitkentbusiness.co.uk

Acknowledgements

If you wish to use any figures or information contained within this report, please acknowledge the source as Visit Kent October 2020 Business Barometer.

And finally – thank you!

We would like to thank all participants in the Kent Business Barometer. With your help we can provide key tourism intelligence to businesses in Kent and have supporting data in lobbying for the county. If you are interested in taking part, you can sign-up here

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