



2020 COVID IMPACT INSIGHTS

This document is an amalgamation of data from Visit Britain and Tourism South East regional data including South East a How's Business Suvery and visitor sentiment tracker.



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Tourism South East (TSE) is the umbrella Destination Management Organisation for the South East of England.

As a not-for-profit membership organisation, TSE supports the largest geographical tourism area in the Country,

- Contributing a total tourism spend of over £12 billion to the UK economy.
- TSE directly supports over 800 members and
- 22 Destination Partners,

ABOUT US



NATIONAL INDUSTRY IMPACT 2020 (March 2021)

- Over 80% of tourism businesses closed compared to just 24% of all businesses
 - Around 75% of tourism employees have been furloughed compared to 27% of all employees
- Revenue for accommodation businesses down by 73% during 2020
- Tourism will reopen later than any other industry and will operate under restricted capacity for many more months



Percentage change in bookings/visitor numbers compared with October, November and December 2019?



Increased by more than 10% - 4%
Increased by 3-10% - 2%



About the same - 5%



Decreased by 3-10% - 2%
Decreased by 10-20% - 2%
Decreased by 20-30% - 5%
Decreased by 30-40% - 7%
Decreased by 40-50% - 5%
Decreased by 50-65% - 11%
Decreased by 65-80% - 11%
Decreased by 80-100% - 47%

Percentage change in revenue gains compared with October, November and December 2019?



Increased by more than 10% - 5%
Increased by 3-10% - 2%



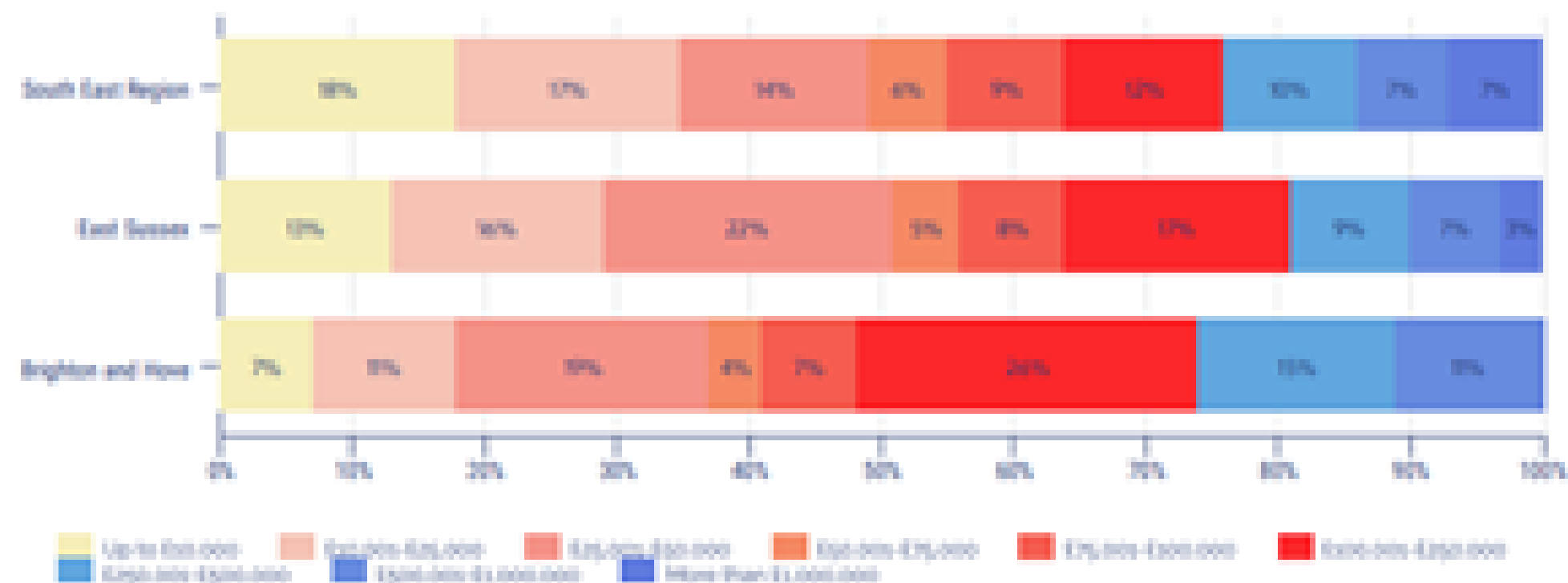
About the same - 5%



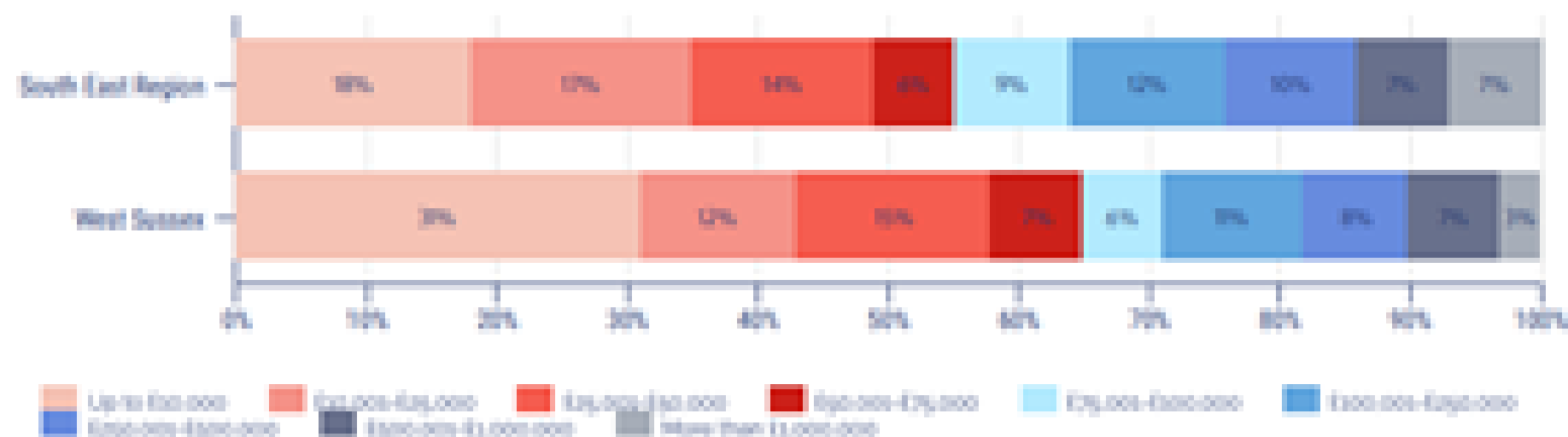
Decreased by 3-10% - 0%
Decreased by 10-20% - 4%
Decreased by 20-30% - 4%
Decreased by 30-40% - 9%
Decreased by 40-50% - 7%
Decreased by 50-65% - 7%
Decreased by 65-80% - 7%
Decreased by 80-100% - 50%

South East Industry Impact 2020 (December 2020)

Anticipated loss of revenue by location of business:



Anticipated loss of revenue:



Nearly a third of all West Sussex businesses (31%) anticipated losses of up to £10,000 over the lockdown period, this compares with 18% of all South East regional businesses. At the other end of the scale, only 3% of West Sussex businesses felt they would lose more than £1,000,000 compared with 7% of businesses in the South East.

Sussex Industry Impact 2020

(August 2020)



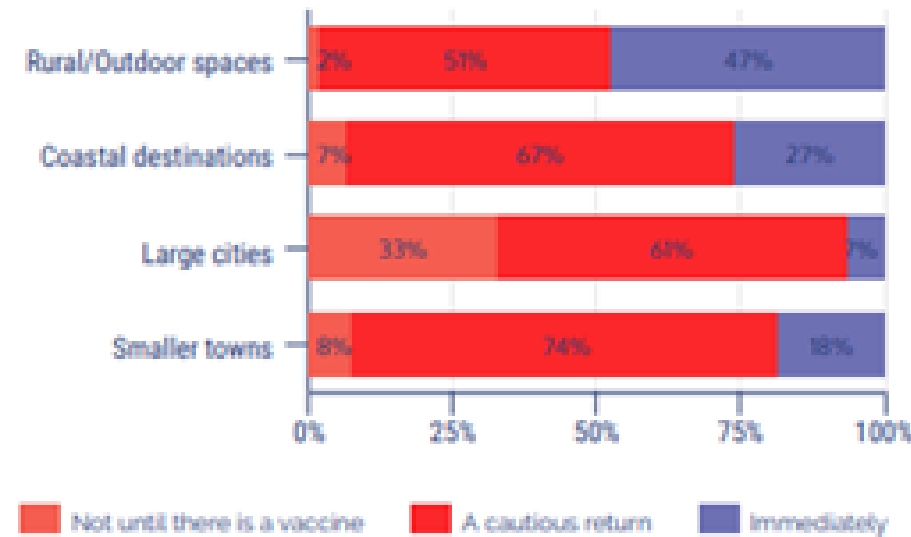
NATIONAL VISITOR SENTIMENT (March 2021)

- **The proportion who consider ‘the worst has passed’ has significantly increased to 29%**
- **32% are presently confident a June trip could proceed as planned,**
- **From October onwards confidence returns to a firm majority of UK adults (63%).**
- **The length of stay for Summer is 36% looking for a short break and 54% for longer breaks (+4 night)**
- **Currently, 10% considering South East (South West leading the way with 29%)**

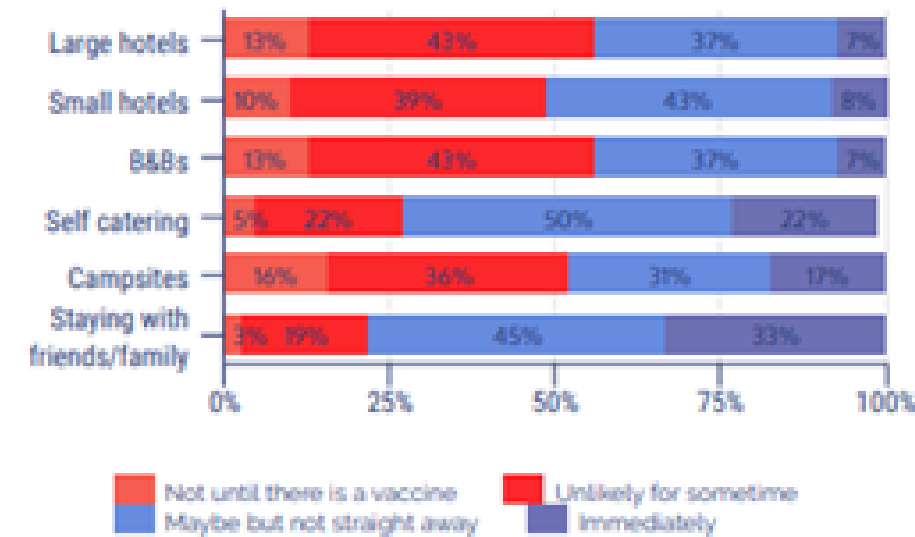
Understanding holiday plans in this new world

As soon as government allows, how quickly will you return to:

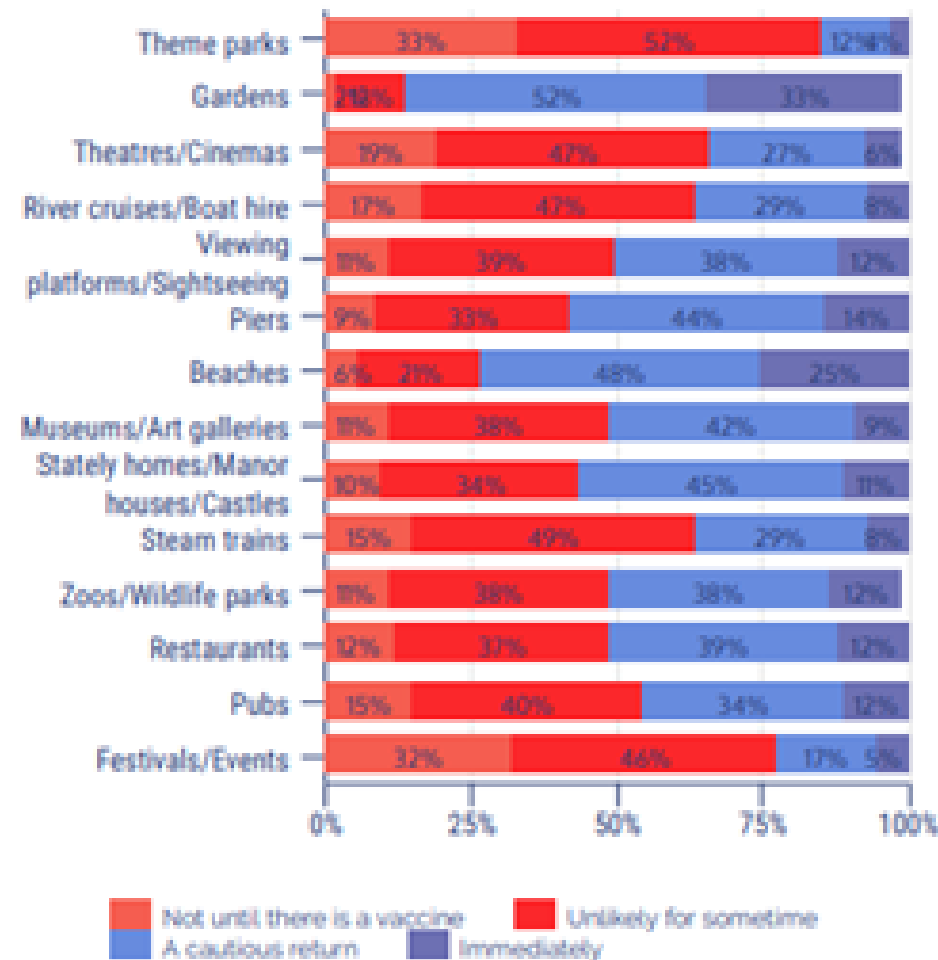
These types of places:



These types of accommodation:



These types of places to visit:



What type of transport will you be using?

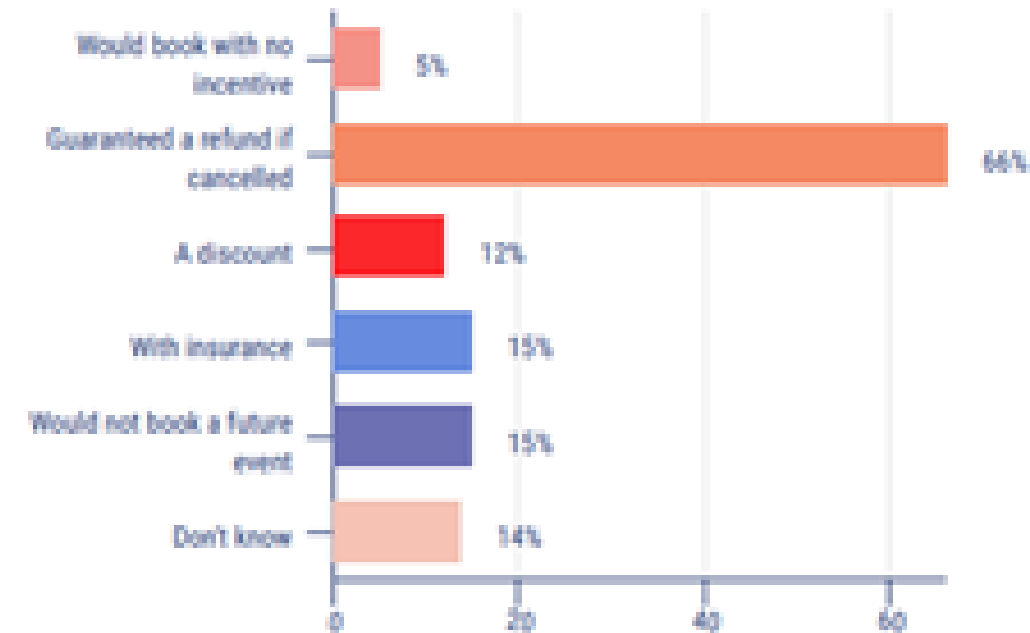


**South East
Visitor
Sentiment
(August 2020)**

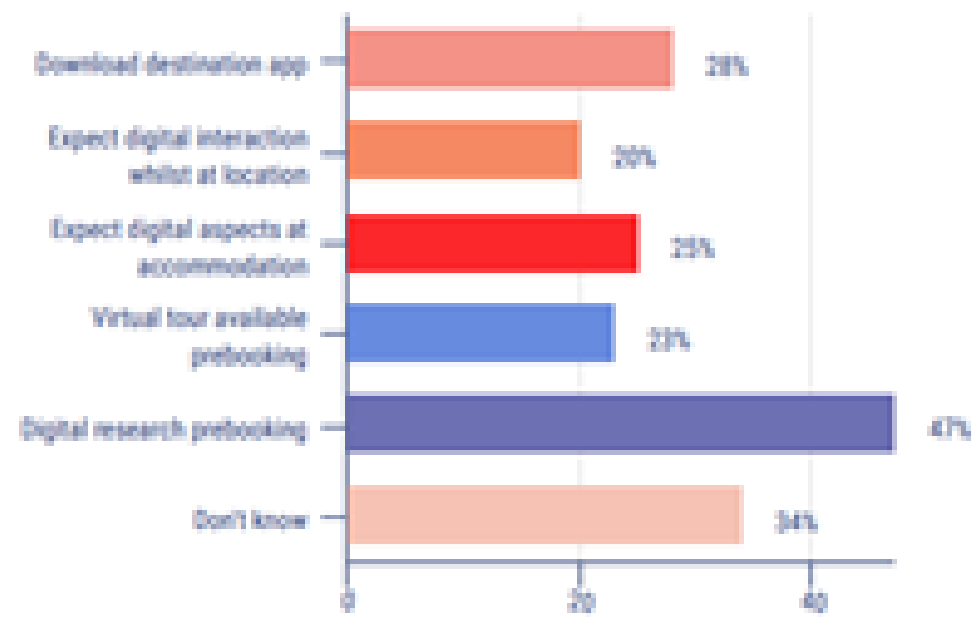
How holiday 'wish list' will change?



Confidence in booking future events with:



Will you have the inclination to use technology more actively when making a leisure booking?



Key Messages

- **Visitors multi- generational/ experienced-based**
- **Confidence in outdoor - must encourage even dispersal of visitors - avoid honey pot management issues**
- **Booking on-line**
Know before you go
Go to go Scheme



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South East Marketing Campaign Love Where you Live

We hope that you will continue to
**Love Where You Live / Love
South East England** as we move
through the road map and
restrictions begin to be lifted.

The local Sussex economy
continues to need your love.

Link up with your local
destinations via our 'stay local,
support local' page - you will find
Sussex and Brighton websites

Longer-term

2021 is the year for Domestic

**International travel expected to
return in force by Autumn/2022**

**Return to 2019 tourism figure
by 2024/5**

**TOURISM
SOUTH EAST**
Helping Tourism Businesses Grow



Consumer Channels



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