Interreg France (Channel Manche) England EXPERIENCE

EUROPEAN UNION
European Regional Development Fund

VISIT KENT BUSINESS GARDEN of ENGLAND

Kent Downs Area of Outstanding Natural Beauty

Interreg EXPERIENCE- Social Impact Monitoring: Kent Residents Survey

WAVE 2

June 2021

RUBY RUSS RESEARCH CONSULTANCY

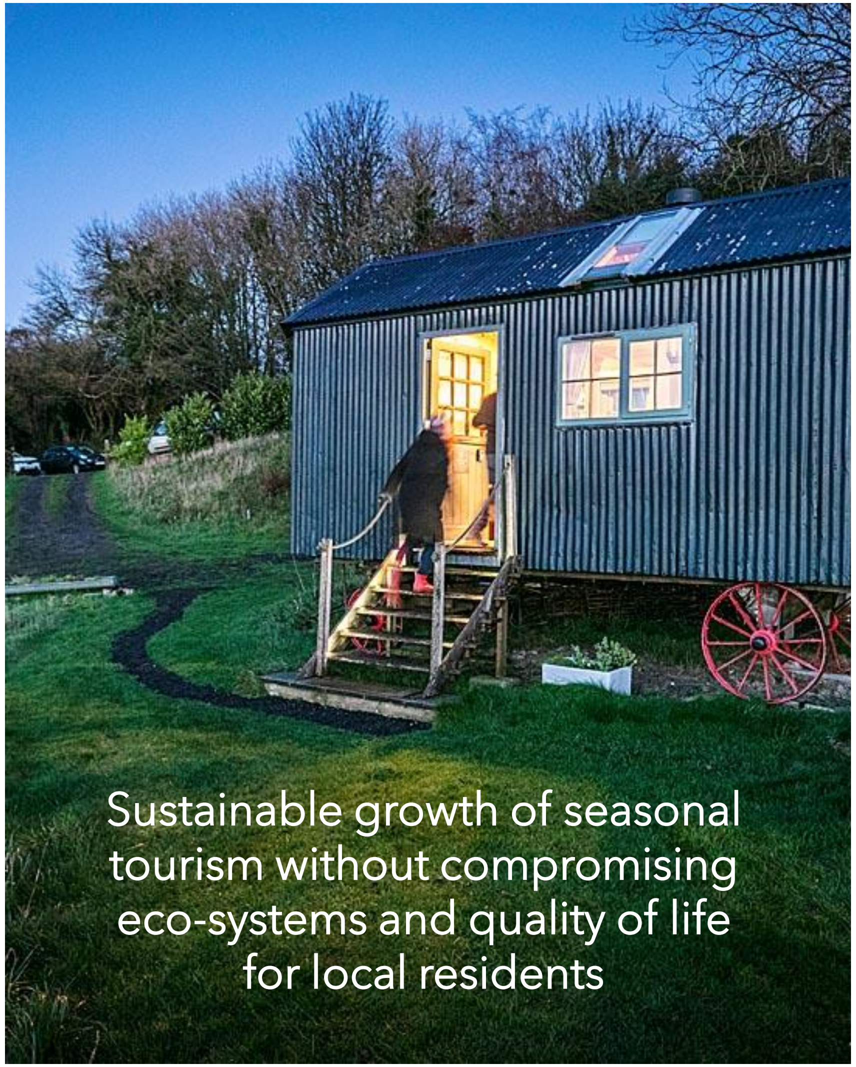
Contents

Introduction and Report Overview

This report is based on findings from a recent survey sent out to Kent residents, to gather valuable insights into their perceptions of seasonal tourism, as well as the impact of the COVID-19 pandemic on local communities. This survey is the second wave in a series of surveys that are being completed, with the first wave having been previously conducted last year based on summer tourism activity.

This activity 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. This concept is supported by the growing demand for experiential tourism, and subsequently presents an opportunity for businesses and destinations to not only increase visitation in the shoulder months, but also to strengthen the resilience of the sector post-COVID. The principle of sustainable tourism is also a topic that is embedded in the project's approach, as it seeks to ensure sustainable growth of seasonal tourism without compromising eco-systems and quality of life for local residents. The contribution that the project will bring to Kent is vital, including mitigating the impact of increased visitor footfall, and it aims to bring economic, social and environmental benefits to communities and the wider destination. Moreover, the revenue generated will be used to help protect and maintain historical and cultural attractions that are integral to the county's tourism landscape, product offering, and sense of place.

The support of residents and local communities is fundamental to successful tourism development and continuity, and can have a considerable impact socially, economically and on general wellbeing. Therefore, by monitoring these impacts over a series of surveys across the lifetime of the project, any changes to perceived impacts can be tracked and any trends can be identified. Furthermore, by assessing impacts and perceptions over the peak summer and winter seasons, any parallels and contrasts can be drawn, allowing findings to be aligned to help support and inform wider project activity.



This report is based on findings emerging from the second wave of data collection, interrogating perceptions around the impacts of winter tourism, with the central aim to identify key areas that differ from the sentiment expressed in the initial summer wave of the survey. By doing this, key trends and parallels will be outlined to create a picture of how seasonal changes in tourism activity can impact residents’ views towards the sector, highlighting the benefits and challenges it can bring to local communities. Findings will also be segmented by variables such as respondent demographics, district of residency and those situated within the Kent Downs AONB, where sample sizes allow. In doing so, any findings that differ from the overall county results can be highlighted, to add further depth to interpretation and recommendations. The report will include the following sections, followed by a list of key takeaways and recommendations, which will be compiled to help inform wider project aims and objectives, future waves of the survey and general destination activity.

- Perceived impacts and benefits of winter tourism in residents’ local area
- Impact on wellbeing and emotional connection to local area pre and post COVID
- The social, cultural and economic impacts post-COVID
- Top positive and negative impacts of tourism and overall resident support

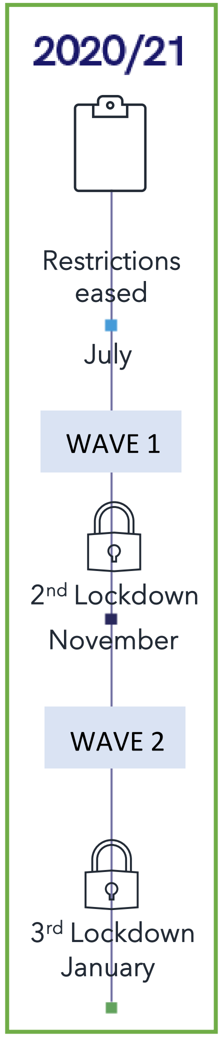
The report that was published following the first wave of the residents' survey, aimed to act as benchmarking tool for future waves of the survey, and therefore covered results for all the questions included, to help create a picture of residents’ current perceptions and support of tourism. Subsequently as previously highlighted, this second report will primarily focus on outlining key differences and similarities between summer and winter tourism. However, in each respective section, questions that did not meaningfully fluctuate from wave 1 will also be acknowledged.

Given the unprecedented impact of the COVID-19 pandemic, continuing to outline and monitor the implications of this will be essential. Insights gained from this report will be key in helping to further understand this impact and track any changes in perceived benefits and risks associated with tourism, across different times of the year.

As previously mentioned, this report will look to identify key differences between results in wave 1, based on perceptions around summer 2020 tourism, and wave 2 – perceptions of winter tourism, during the same year. However, it is also imperative that these findings are understood within the context of their own time, in terms of varying COVID-19 restrictions, national lockdowns and changing consumer sentiment.

For example, the initial wave of the survey was based around a time when restrictions were eased and lockdowns were lifted, with many attractions and hospitality venues beginning to re-open from the 4th July. Here, residents were able to engage more with local facilities and amenities and interact more with loved ones, alongside taking part in the Eat Out to Help Out Scheme.

Whereas, the second wave gathered people's perceptions of tourism during the second and third lockdowns in November and January, in addition to the tightening of restrictions around the Christmas period and the uncertainty that came with this. It is important to keep these considerations in mind, as some of the results in terms of activity and engagement have been further impacted compared to the summer, and respondents' views have been inevitably altered, as a consequence of the shift in rules and restrictions.



*Percentages in orange represent changes compared to wave 1 results & wave 2 results are in green

Kent Residents Survey - Wave 2

KEY FINDINGS

This survey looked to present findings from the second wave of a recent survey, which aimed to gather valuable insights into the perceptions of Kent residents on the impacts of seasonal tourism, as well as the impact of the COVID-19 pandemic on local communities.

65% Consider their local area to be a tourist destination

88% Of residents agreed with the statement 'I support winter tourism in my local area'

Perceived main attraction in local area

Coast/Beaches	Museums/ Historic sites	Countryside
42% - 34% ↓	28% - 27% ↓	17% - 23% ↑

1,260 Kent Residents

Online Survey

Top perceived benefits of winter tourism in local area

Increases demand for historic & cultural attractions	-3%
Tourism improves the local economy	-9%
Local investment development & Infastructure	+27%
Preserves historic buildings & monuments	-5%
Increases availability of recreation facilities	-4%
Increases employment opportunities	-13%

62% Agreed they like to meet visitors in their local area -5%

22% Of residents felt there were too many visitors in their local area +6%

Perceived change in visitor numbers during winter 2020

Decrease	Same/ Don't know	Increase
47% (+6%)	27%	27% (-4%)

Areas for improvement

Tourism limits the availability of parking	+2%
Tourism can be harmful to the natural environment	+10%
Increase availability of public transport services	on par

86% Of residents agreed with the statement 'I live in a beautiful area' +4% vs. wave 2

54% Of residents felt that their local area was more peaceful & calm in light of COVID-19 +5% vs. wave 2

Methodology

Data Collection

01

Wave 1

Prior to the most recent wave of the residents survey, wave 1 of the survey was sent out to Kent residents in the autumn, to gain an insight into perceptions of summer tourism on local communities.

02

Wave 2

Following this, wave 2 of the survey was then sent out to local residents in Februrary, with questions centering around the preceived impact of winter tourism.

Methodology

Data was collected through an online survey sent out to Kent residents via Visit Kent and partners' resident databases and shared via various social channels. The survey was also incentivised and respondents were given an opportunity to be entered into a prize draw.

The survey was targeted at those who live within the county and required respondents be 18 years or over to participate. Respondents' participation in the survey was voluntary, they were able to discontinue the survey at any point and all data collected was kept strictly anonymous and confidential.

The survey itself was scripted and hosted by the University of Surrey, who are also partners in the project and following data collection, data was shared with Visit Kent to be analysed for the purpose of this report. Prior to analysis, any partial responses up to an agreed point in the survey were removed for consistency and accuracy purposes, which resulted in a total sample size of 1,260 respondents. In comparison, wave 1 of the survey had a total sample size of 1,258, therefore providing a robust and comparative sample size. Please note, as not all questions in the survey were mandatory, sample sizes for certain questions may differ.

Online survey sent to Kent Residents

12 minutes to complete

1,260 Respondents

Sample & Demographics

Gender & Age

In order to analyse respondents' profiles and to create a picture of the sample, the survey asked residents to answer a series of demographic questions, including age group and gender. Findings show that the majority of respondents were female **(66%)** and **32%** male, with the remaining **1%** stating that they would prefer not to say. In terms of age, **58%** were aged 35-64, followed by **24%** aged 65 and over and **16%** aged 18-34. When comparing these percentages to wave 1, wave 2 saw a higher proportion of male respondents, alongside those aged 18-34, meaning that these groups are better represented compared to the initial summer survey.

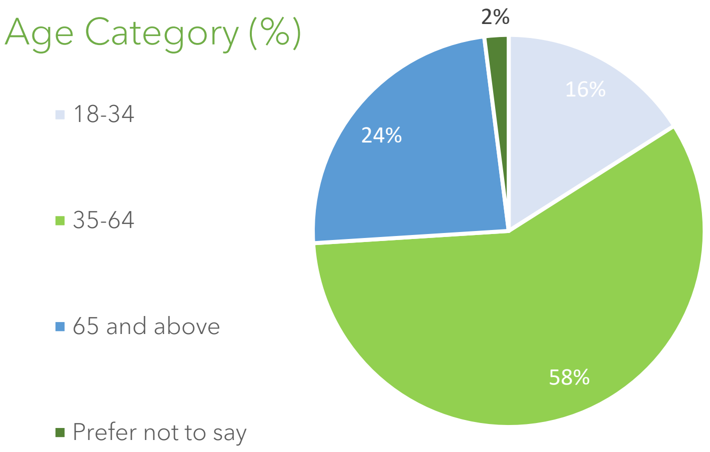
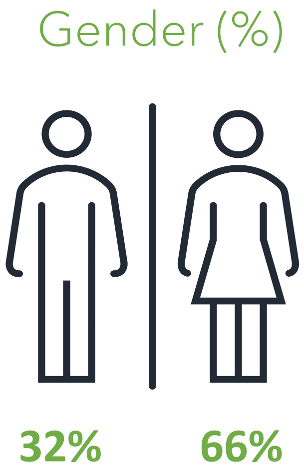


Figure 1: Graph showing the % of respondents that fell into each age category. BASE= 1260



Work Status & Educational Level

Following this, respondents were asked to specify their work status alongside the highest level of education they have achieved. Results show that the largest proportion of residents were employed full-time **(42%)**, followed by **30%** who specified they were retired. This was then followed by **17%** who stated they were employed part-time and **4%** were unemployed, with the remaining **2%** consisting of those that specified they were a student. In terms of education, the largest proportion of respondents had achieved an undergraduate degree such as a BA or BSc **(35%)**, closely followed by **24%** having achieved A-level or NVQ level 3-4 standard.

These percentages alongside those on the previous slide for gender and age, indicate that overall the sample is skewed slightly more towards the older demographic, alongside female residents and inclusive of those 35 years old and above. The sample does strongly capture those that are employed full-time and retired, two markets traditionally known for having a higher disposable income.

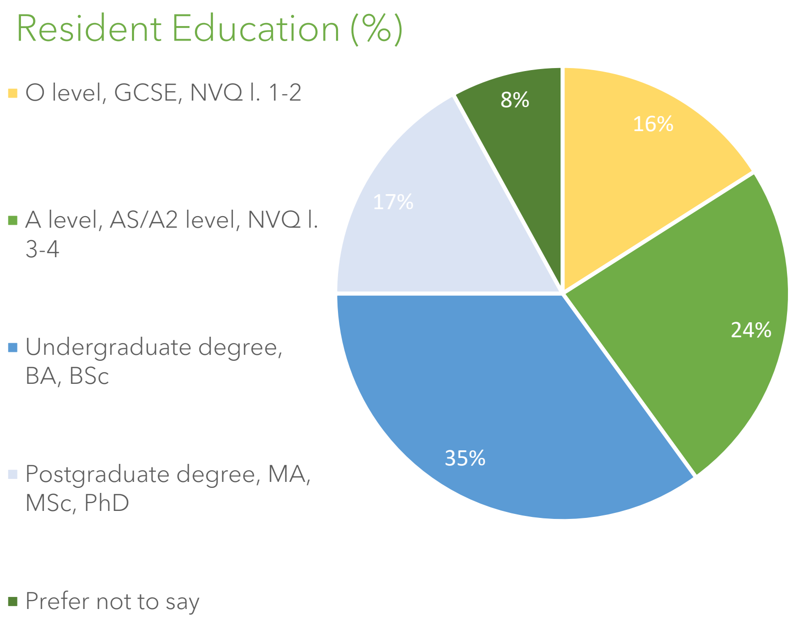


Figure 2: Graph showing the % of respondents and educational level BASE= 1258

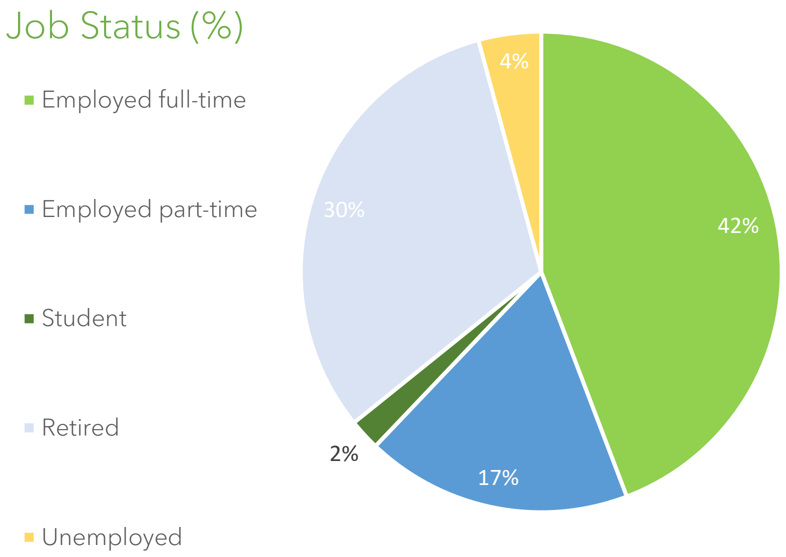


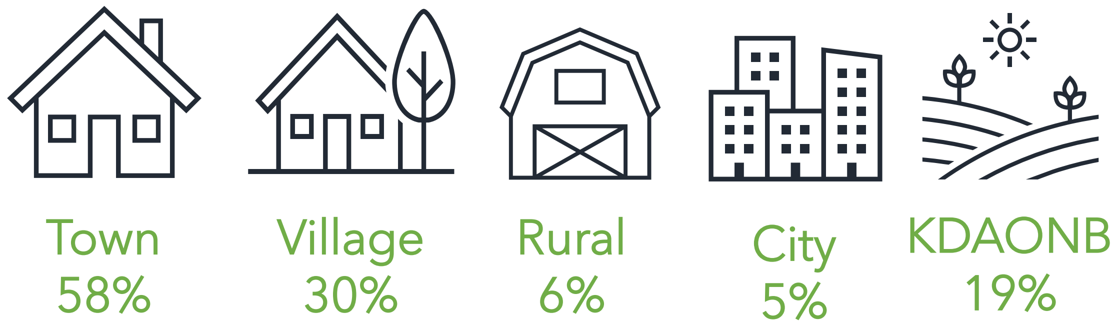
Figure 3: Graph showing the % of respondents and their work status BASE= 1260

Location & District

The survey then asked respondents to specify which district and type of area they are located in. As shown in Figure 4, the largest proportion of residents were either located in Thanet, Canterbury, Swale or Dover (all 11%). The proportion of respondents located in each of these districts does also indicate that the overall sample is fairly illustrative of each of Kent's regions, with representation in East, West and North Kent. Moreover, when comparing results with those from the previous wave, the number of residents in either Dover (+4%) and Swale (+3%) saw an increase, while those selecting Thanet, Canterbury and Ashford saw a decrease of -4%.

In terms of type of area, the largest proportion of respondents were located within a town (58%), followed by 30% residing in a village. Findings also show that only 6% selected rural and 5% city, with the latter most likely representing those located within the city of Canterbury. As an additional segment, survey data was also analysed by those that specified they live within the Kent Downs AONB, with 19% of residents falling into this group, an increase of +17% compared to wave 1.

Area of Residence (%)



Are you in the Kent Downs AONB? BASE= 1114

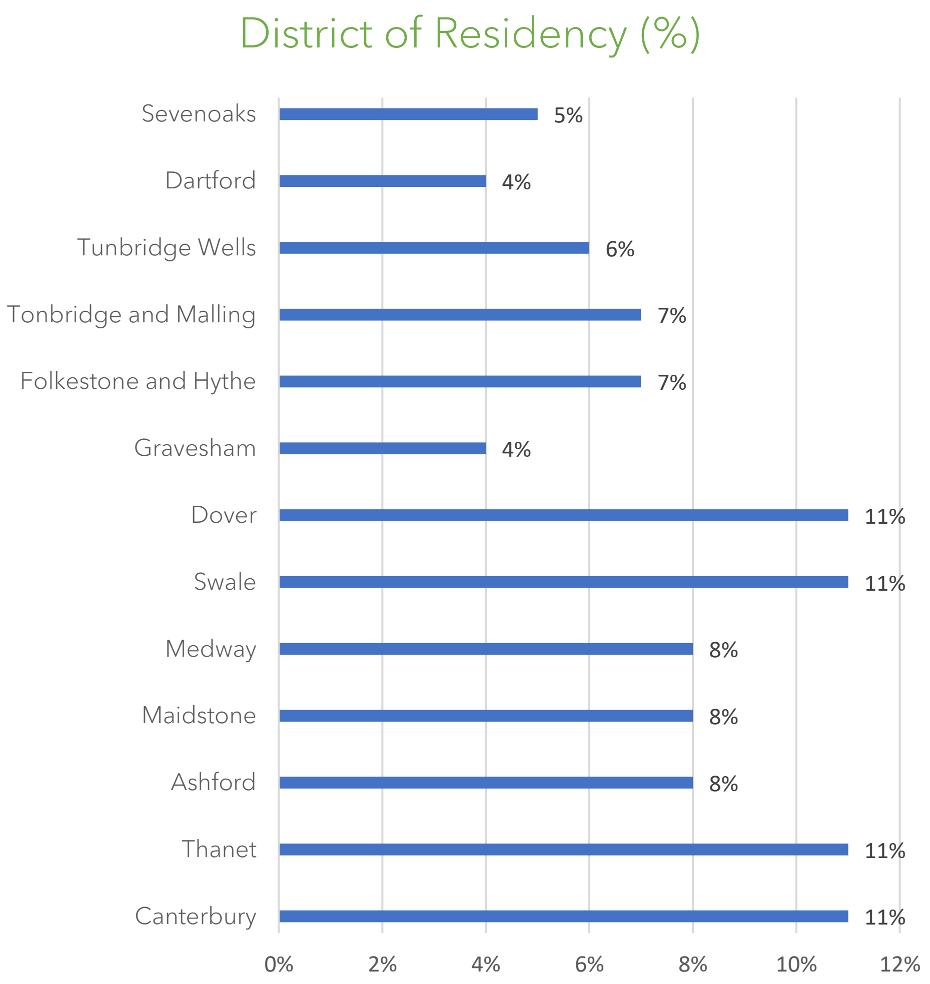


Figure 4: Graph showing the % of respondents and their home district BASE= 1260

Years of Residence & Tourism Industry Involvement

Looking at how long they had been residing in their local area, answers ranged from those that had lived there for under 5 years, to those that had lived there for more than 25. As shown in Figure 5, the largest proportion (**44%**) of residents stated to have lived in their area for more than 25 years, followed by **41%** selecting between 5-25 years, with the remaining **16%** having been there for under 5 years. Firstly, findings show that overall, the sample is very much established in terms of length of residency, which may result in having a more extensive knowledge and experience of local changes and impacts over time.

The survey also asked if anyone within their household works in the tourism industry, as this may give respondents a more focused and informed view of the impacts that the tourism industry can bring. However, results show that only **10%** of residents had somebody in their household working within the industry. Overall, when comparing these percentages to the previous wave's sample, results are fairly on par, with the exception that those working in the tourism industry was **+3%** higher compared to wave 1 results.

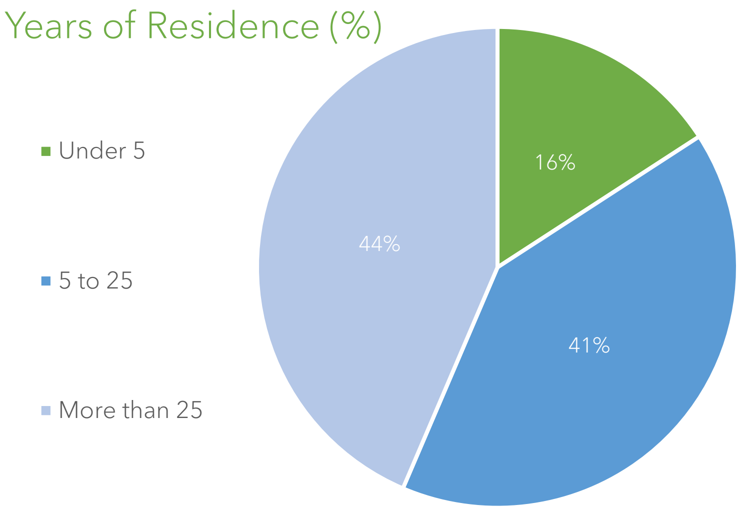


Figure 5: Graph showing the % of respondents and their length of residence
BASE= 1260

Does anyone in your household work in the tourism industry?

Yes
10%

No
90%

Main Attraction

Respondents were also asked to select from a predefined list what they perceive the main attraction in their local area to be. As shown in Figure 6, the largest proportion selected coast/beaches (**34%**), followed by **27%** selecting museums/historic sites and buildings and **23%** selecting countryside. Alongside this, **3%** of respondents selected 'other', which included responses such as breweries, vineyards, pubs and restaurants, alongside events and festivals and woodland walks and parks. In addition to these, some respondents also mentioned more specific attractions such as Leeds Castle, Canterbury Cathedral and Bluewater Shopping Centre. When comparing these findings to those from wave 1, results show that a smaller percentage selected coast/beaches **(-8%)**, most likely indicative of reduced engagement with these areas in the colder winter months. Moreover, **+6%** more residents selected the countryside as their main attraction in wave 2, which may indicate a higher level of engagement with rural areas and activities in the off-season compared to summer.

Results were also analysed by age group, to highlight any differences between demographic groups. Firstly, results show that a higher proportion of residents aged 18-34, selected the countryside as their main attraction compared to wave 1 **(+11%)**, in addition to outdoor attractions **(+8%)**. This together with **-21%** less residents within this age group selecting coast/beaches, indicates that this demographic in particular may display a higher level of engagement with the countryside in the off-season compared to summer. In contrast, residents aged 65 and over, expressed a similar level of acknowledgement of their areas' beaches and countryside areas in both waves. However, results did highlight that a higher proportion of the older demographic did select museums/historic sites and buildings **(+4%)**, compared to county-wide results where this attraction saw a decrease of **-1%** compared to wave 1.

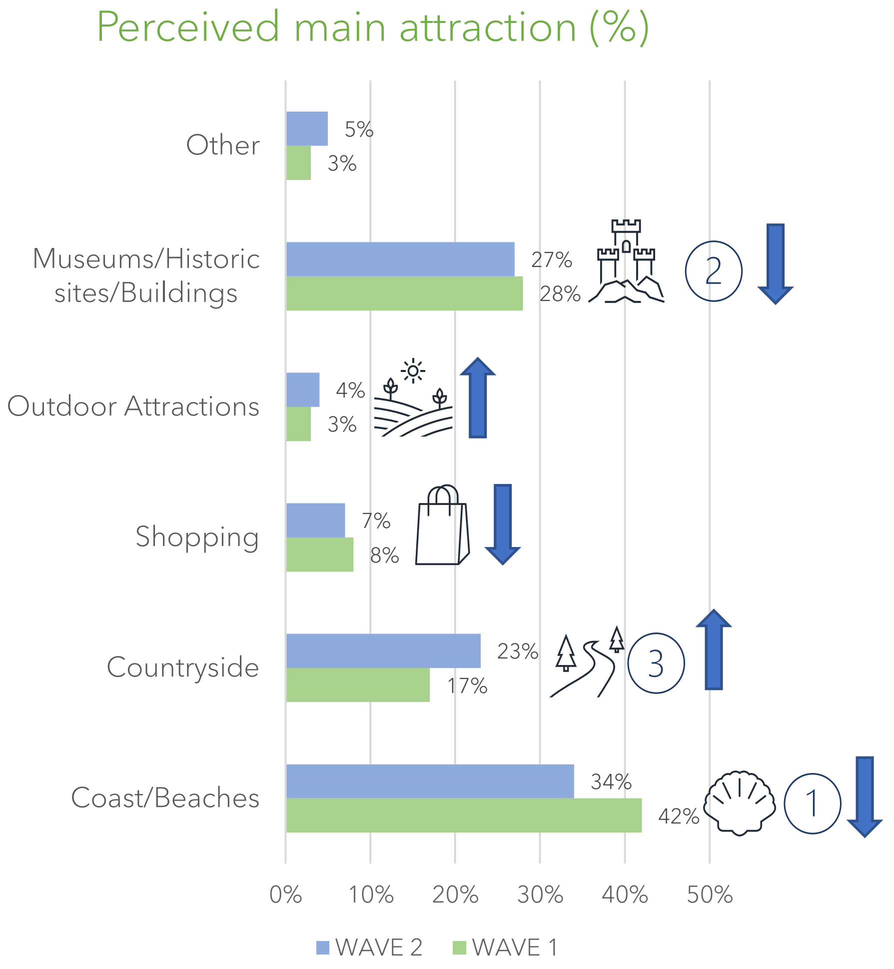


Figure 6: Graph showing the % of respondents and their perceived main attraction BASE=1260

Wave 1
vs.
Wave 2

<u>All Respondents</u>
Countryside
+6%
Coast/Beaches
-8%

<u>18-34 years</u>
Countryside +11%
Outdoor Attractions
+8%
Coast/Beaches -21%

<u>65+ years</u>
Museums/Historic
sites +11%

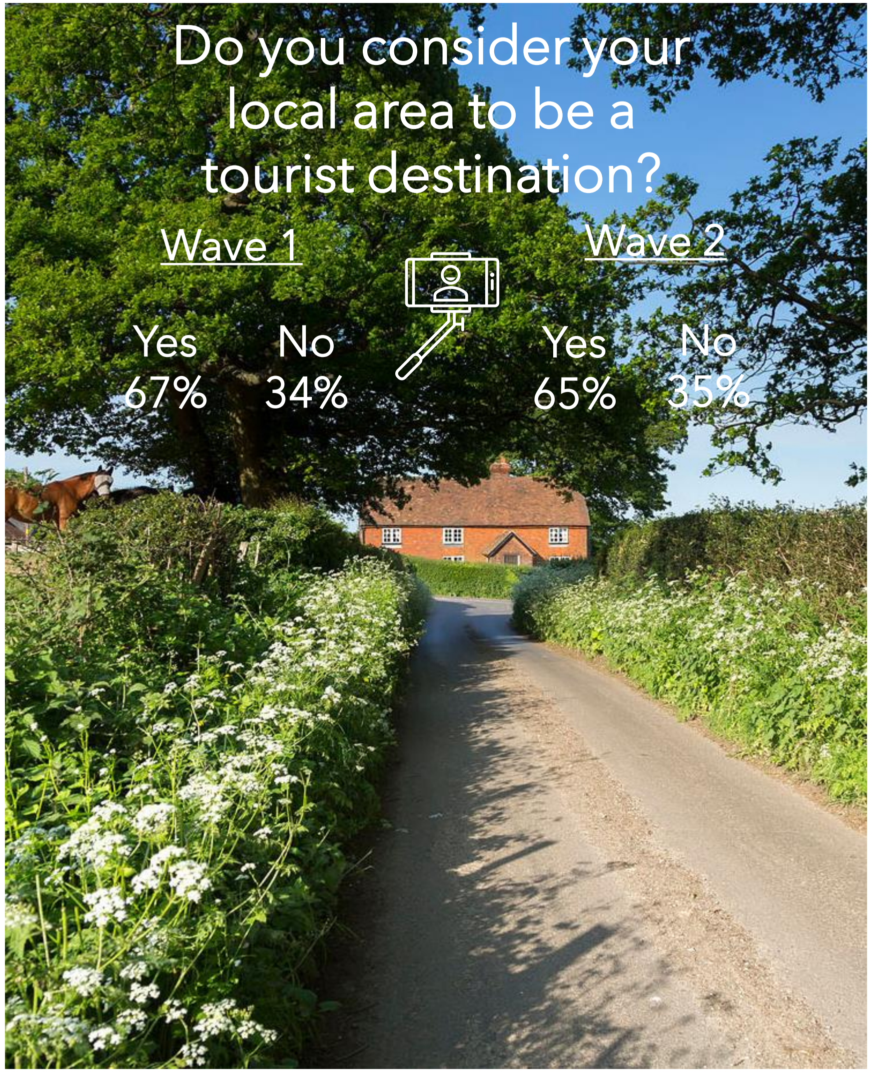
Tourist Destination

Residents were also asked if they consider their local area to be a tourist destination, with results showing that the majority of respondents did think so, with **65%** selecting 'yes' and **35%** selecting 'no'. A similar sentiment to this question was also observed in wave 1, although a slightly higher percentage **(+2%)** identified their local area as being a tourist destination. This slight decrease in the winter period is likely reflective of certain areas seeing a decrease in activity in the off-season.

In the initial wave of the survey based on summer 2020, results for this question also highlighted that residents who perceived their area as a tourist destination were more likely to select coast/beaches as their main attraction, compared to county-wide results. This finding also emerged in wave 2, (**40%** vs. **34%**), alongside residents in areas not seen as a tourist destination being more likely to perceive the countryside as their area's main attraction (**33%** vs. **23%**)

Overall, findings from both waves demonstrate the prominence and value the coastal offering has to residents living in more popular tourist spots, with these residents still perceiving beaches and coastal spots as being the main attraction in both the summer and winter season. However, in terms of being a 'tourist destination', results from wave 2 do mirror the county-wide sentiment that those selecting countryside as their main attraction did increase in the winter season for both types of destinations, compared to wave 1.

'Residents who perceive their area as a tourist destination were more likely to select coast/beaches as their area's main attraction, while those living in less touristy destinations were more likely to perceive the countryside as their main attraction'.



KENT RESIDENTS SURVEY FINDINGS:

IMPACT AND BENEFITS OF TOURISM

01

Impact of Winter Tourism

The survey was broken down into various sections, the first of which looked at the perceived impact and benefits of winter tourism locally. Firstly, residents were presented with a list of statements about the impact of winter tourism on their local area, and were asked to indicate how much they agreed or disagreed with each statement. All statements presented to respondents also specified that questions were based on a typical winter prior to the COVID-19 pandemic. However, due to the profound impact of the pandemic, some responses may be skewed towards this narrative, reflecting various economic and social changes this brought about in the winter when restrictions were in place.

Respondents were also informed that 'local area' is defined as the city/town/village that they live in, rather than their home/place of residence. The survey also defined any references to 'tourism' as people on day trips and those coming from further away for a few days or more.

As with wave 1, certain responses throughout the report have been combined, for example those that selected 'strongly agree', 'agree' and 'somewhat agree', to present a level of overall agreement or disagreement. However, a full list of questions and percentages will be included for each section in the appendices.

Impact to Historical Sites & Natural Places

Initially, the survey focused on tourism's impact on preservation of historic buildings and monuments, alongside its potential to increase demand for local historical and cultural attractions. This was then followed by assessing residents' perceptions regarding tourism's impact to the natural environment, which consisted of asking residents to rate their level of agreement with the statement 'tourism is harmful to natural places like the countryside or coast'.

The following section will look to present findings for these questions, alongside other impacts of winter tourism activity and as previously mentioned earlier, the report will focus on identifying key differences between the initial summer and winter waves to begin mapping sentiment trends and changes.

Impact to Historical & Cultural Sites

In terms of preservation and demand, respondents were asked to rate their agreement with the statement 'tourism preserves historic buildings and monuments', alongside 'tourism increases demand for local historical and cultural attractions'. As illustrated below, findings for the second wave of the survey do mirror those of the initial wave, with residents still displaying a high level of agreement with both statements. However, when directly comparing waves, overall agreement was slightly lower for both statements based on winter tourism. This included a decrease of -5% in wave 2 for agreement that tourism preserves historic buildings, alongside a -3% decrease when it came to demand for these types of attractions.

When looking at the results for both waves collectively, it is evident that historic preservation and driving demand for these sites, are perceived as key impacts of tourism activity and are being sufficiently acknowledged by residents. While it is clear that residents may benefit from these aspects more so in the high-season when there is more tourism activity, results show that residents do strongly recognise tourism's role in driving the demand and maintenance of these sites both in the summer and winter. Furthermore, as highlighted in the previous report for wave 1, moving forward a continued effort should be placed on reinvesting income generated and accessing funding streams to ensure historic and cultural sites are preserved, which will not only attract visitors but that can ultimately benefit local residents and increase a local sense of pride.

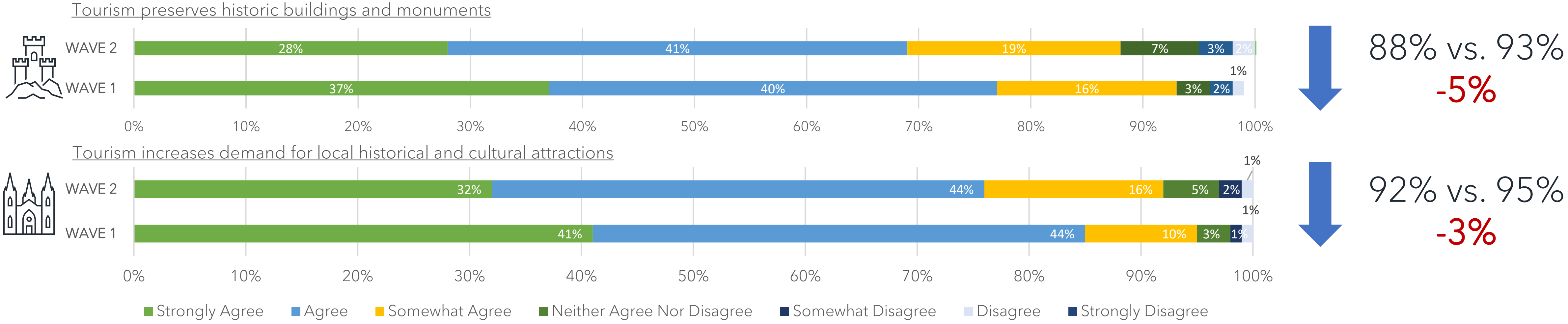


Figure 6: Graph showing agreement that tourism preserves historic buildings/increases demand for local historical and cultural attractions BASE=1260

Impact on the Natural Environment

Following this, residents were asked to rate their level of agreement with the statement 'tourism is harmful to natural places like the coast or countryside'. Findings from wave 2 show that **63%** of residents did agree on some level that tourism can cause adverse impacts to the natural places. In contrast, in wave 1 this percentage was **-10%** lower compared to the latter, indicating that during winter residents expressed a higher level of concern about the environment. This unease among residents can certainly be seen in both waves, with results likely influenced by the increasing pressure and attention that damage to the environment and sustainability is gathering, further accelerated by coverage in the media.

Together with an increase in residents selecting the countryside as their area's main attraction, this sentiment could imply that damage has been observed in the countryside more so in the winter period. However, although views are based on winter activity, for some residents their response may also be a reflection of previous summer activity. Overall, this sentiment is likely a combination of increased awareness of wider issues and the influx of visits to outdoor spaces during this period. It is also an indication of the effect that wider factors can have on people's general perceptions.

<u>Tourism is harmful to natural places like the countryside or coastal areas</u>

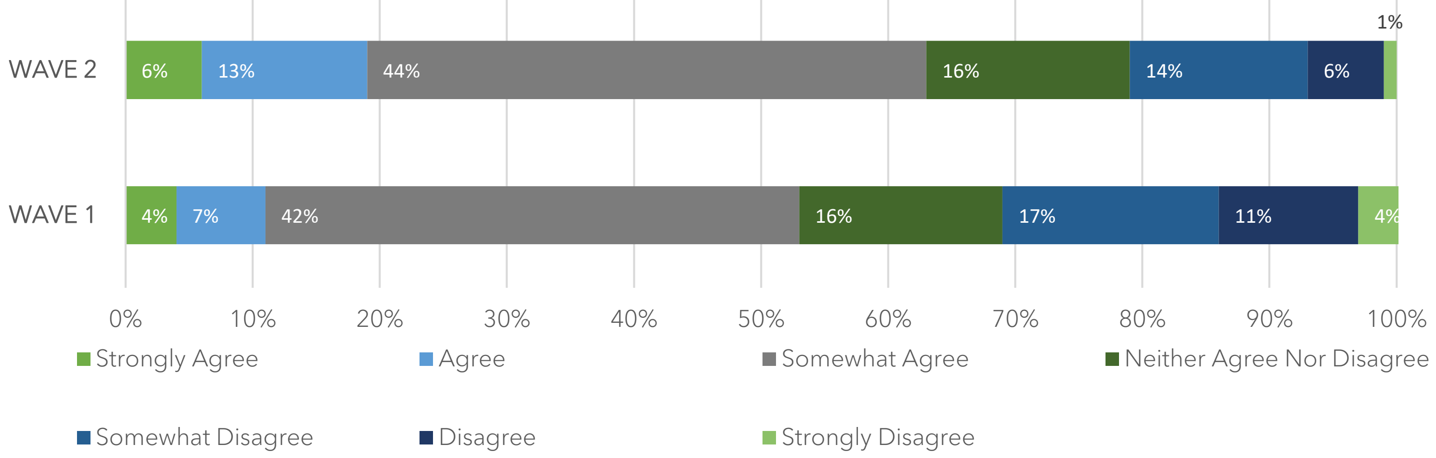
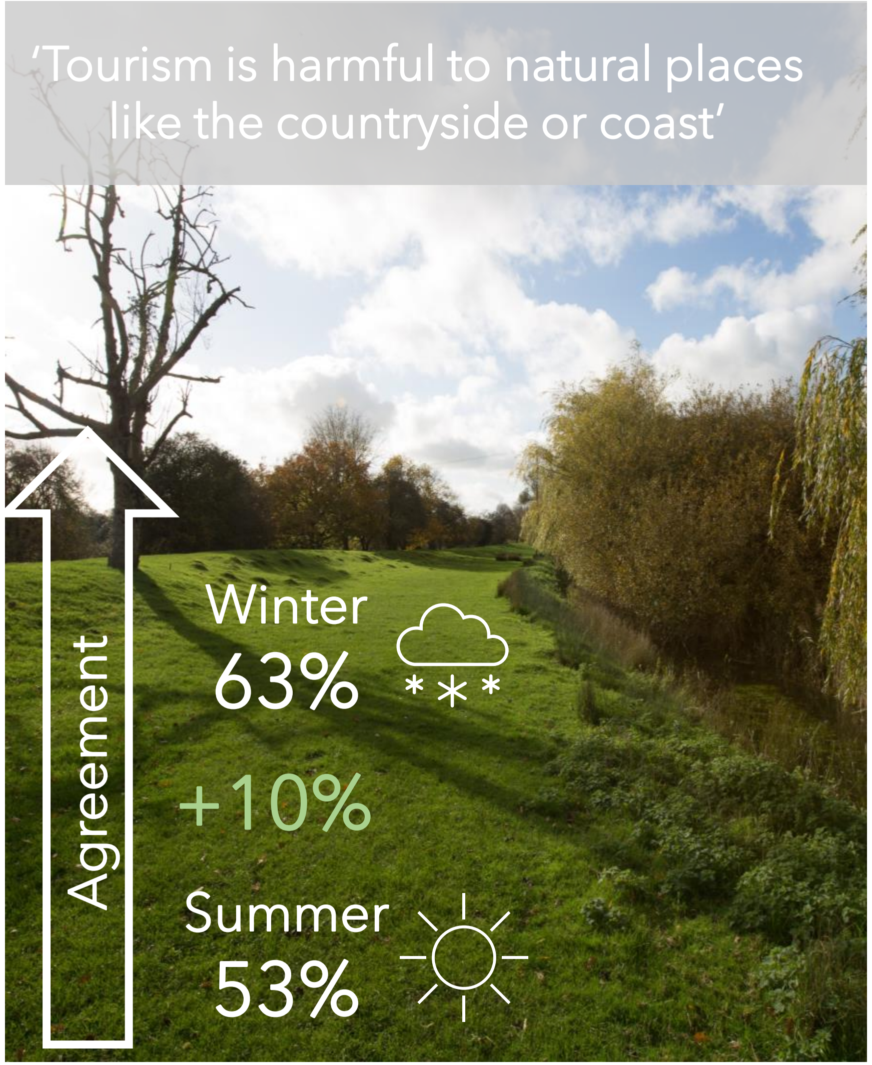


Figure 7: Graph showing agreement that tourism is harmful to natural places BASE=1260



Availability of Local Facilities

The survey then asked residents to rate their agreement with the statement 'tourism increases the availability of local recreation facilities and opportunities', with findings showing that **82%** agreed with this to some degree. Overall, this highlights that residents recognise the link between tourism demand and facility creation which benefits the local area. Results across both waves show that agreement with this statement saw a slight decrease of **-4%** during the winter season, a result that is most likely reflective of reduced tourism activity in the off-season, in addition to the impact of the lockdowns and restrictions imposed during this period.

Visitors in Local Area

To gain an insight into residents' views on visitors to their local area, respondents were asked to rate their agreement with the statement 'there are too many visitors in my local area'. Findings show that for wave 2 only **22%** agreed with this on some level, with the largest proportion selecting 'neither agree nor disagree' (**29%**). However, results also show a **+6%** increase in agreement compared to wave 1 results.

Agreement* BASE = 1260

	Wave 1	Wave 2	
'Tourism increases availability of local recreation facilities/opportunities'	86%	82%	↓
'There are too many visitors in my local area'	16%	22%	↑
'I like to meet visitors in my local area'	67%	62%	↓

Overall, findings still indicate that county-wide, residents do not feel that there is overcrowding in the winter months or that visitors' presence is negatively perceived in terms of quantity. Yet, the slight increase in agreement across waves could be indicative of the effect that COVID-19 restrictions had on residents' perceptions, where despite visitor numbers being lower than in the busier summer season, residents are more aware of their presence. Respondents were then asked if they like meeting visitors in their local area, with **62%** stating they agreed to some level, with only **9%** displaying some level of disagreement. Overall, this demonstrates that residents do favour visitor interaction, which also supports the demand for authentic, local experiences and meeting with local people. However, results for wave 2 do reflect a slight change in sentiment, with **-5%** less residents agreeing with this statement. As already mentioned, this variation is most likely due to the impact of imposed lockdown restrictions and increased cautiousness to interact with others.

Agreement with the statement 'Tourism limits parking spaces available to local people' was on par across waves 1 and 2, with **73%** agreement for the latter and **71%** for the former. These findings indicate that this still presents an area of concern among residents, despite data being collected in the winter, and it is an opportunity to raise resident satisfaction by working to increase the availability of parking for local residents.

Perceived Benefits of Winter Tourism

The survey then presented respondents with a series of additional statements, regarding their perceptions of other benefits and impacts of winter tourism, including its influence on the local economy and creation of employment opportunities.

Local Economy & Employment

When looking at sentiment for wave 2 around tourism's impact on improving the local economy and increasing employment opportunities, the largest proportion of respondents for both statements expressed some level of agreement (**90%** and **79%** retrospectively). However, agreement that tourism improves the economy did decrease by **-6%** in winter, while those agreeing that activity can increase job opportunities, saw the largest decrease of **-13%,** compared to the previous wave. Findings demonstrate that the majority of residents do perceive tourism as being a major factor in bettering the local economy and employment. But, with tourism activity seeing a relative standstill due to the second and third lockdowns, this decrease most likely reflects the effect of this, alongside the fact that winter is traditionally a less prosperous period for local tourism businesses compared to the summer season, which also leads to a high degree of seasonal jobs.

	Agreement*	
	Wave 1	Wave 2
'Tourism increases employment opportunities'	92%	79% ↓
'Tourism improves the local economy'	96%	90% ↓
'Tourism increases prices for local services and amenities'	45%	47% ↑

BASE = 1260

Local Services & Prices

The survey then asked respondents to specify their agreement that tourism can increase prices for local services and amenities, with **47%** displaying some level of agreement, followed by **33%** selecting 'neither agree nor disagree', in addition to **19%** who disagreed to some level.

When comparing this to findings from wave 1, although agreement was fairly similar, the proportion of residents who disagreed with this was **-7%** lower in wave 2. Consequently, this meant that a higher percentage of respondents either agreed or were unsure, compared to the initial wave of the survey. Overall, the most recent results do still reflect that a significant proportion of residents feel that tourism does result in an increase in prices for local services and amenities.

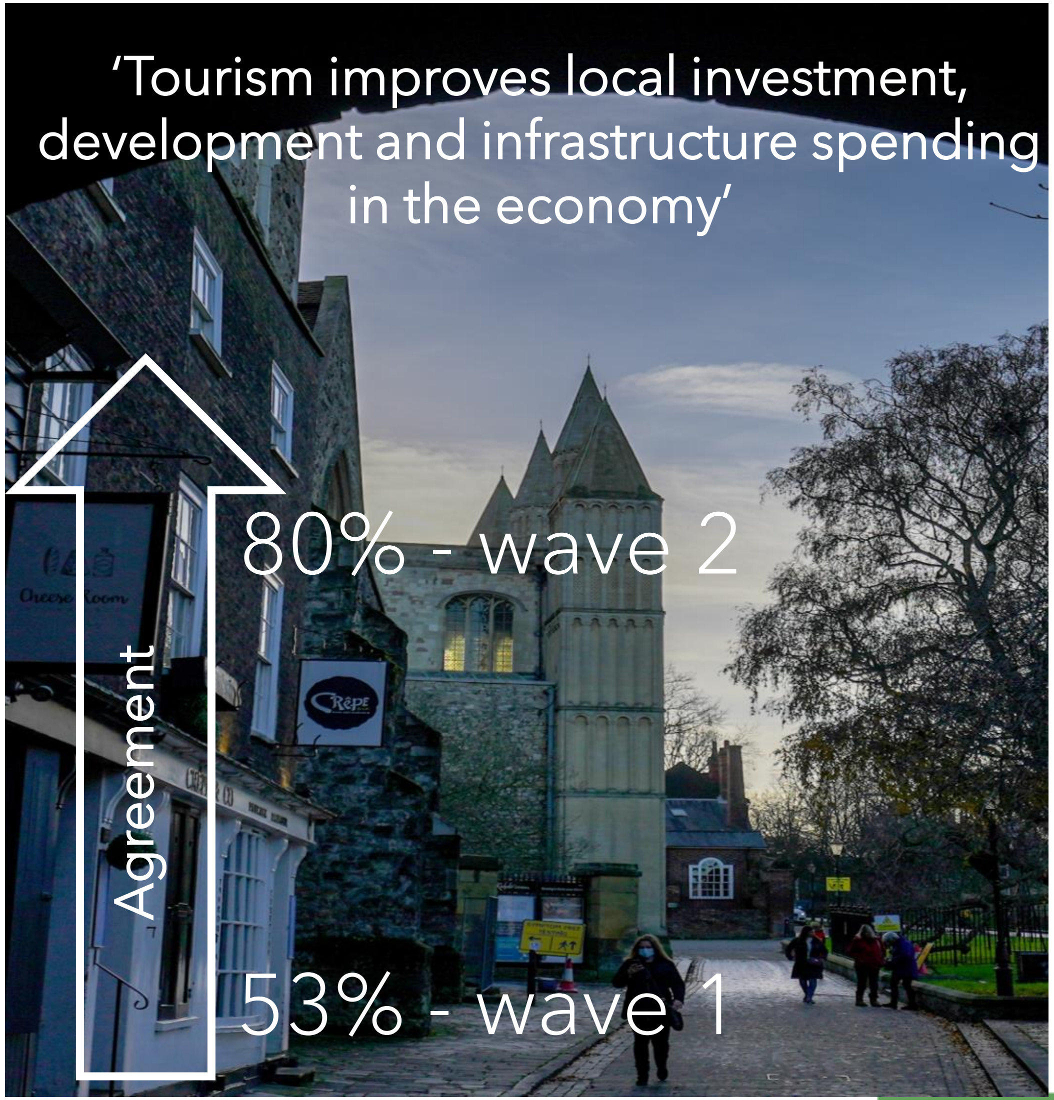
Local Investment & Infrastructure

In terms of comparing resident sentiment across both waves of the survey, an area that saw a significant shift in the winter period was residents' agreement that tourism can improve local investment and development opportunities, alongside the creation of infrastructure and spending in the local economy. This is demonstrated by 80% of Kent residents expressing some level of agreement with this statement in wave 2, compared to 53% in wave 1, a significant increase of +27%.

This increase may be due to several factors, some of which may be more reflective of particular districts in the county, where there are ongoing or planned developments, which has resulted in perceptions of this benefit increasing.

This sentiment could also be due to ongoing or planned developments due for completion by summer 2022, which residents may have observed in their local area or district, resulting in their perception of this benefit to increase during the wave 2 period.

'This sentiment could be due to developments and infrastructure taking place in the winter period that are due for completion ready in time for the busier summer 2022 season'



Looking at the wider picture, due to the reduction in visitors as a result of the pandemic, this may have highlighted the importance and reliance on visitor spend and investment opportunities this can bring to local areas in the minds of residents. This shift in awareness towards the positive impact that a vibrant visitor economy can have to an area is also likely to have been influenced by news coverage on the impact that the sector can have.

Alongside this, the government has also targeted a lot of infrastructure and place making investment spending in areas that heavily rely on tourism activity. Consequently, any news coverage regarding this may have helped residents make the link between a thriving visitor economy and attracting funding and inward investment from the government and other organisations. Furthermore, examples of funding in the county that may have helped influence this sentiment include the Towns Fund projects in Margate, Future High Street Funds (in Dover, Chatham and Ramsgate) and Community Renewal Funds in Thanet, Canterbury, Swale and Gravesham.

Areas which did not see any significant change from wave 1 to wave 2, included sentiment on tourism's ability to increase public transport services. Findings for both waves show that 36% of residents selected some level of agreement, with the largest proportion in each survey disagreeing with this. As in wave 1, this could be representative of particular destinations in the county not being as well connected compared to the more urban areas, again reinforcing recommendations that bettering transport and connectivity should be a priority for less connected areas.

In terms of tourism's potential to reduce residents' ability to access local services and facilities, results are consistent across both waves, with around only a quarter selecting some level of agreement. In turn, this still indicates that while a higher proportion feel tourism may increase prices locally, residents are still able to access facilities locally.

Impact of Winter Tourism- By Respondent Type

Age Catergory

- In terms of tourism activity being harmful to natural places such as the countryside and coast, although agreement among all age groups increased during the winter period, this was highest for those aged between 18-34 (75%), +15% higher than the two older age categories. In addition, the younger demographic also displayed the highest increase in agreement compared to wave 1 (+22%), perhaps indicating the growing concerns among the younger generation on climate change and damage to the environment.

Location

- Looking at results by location, in wave 2 agreement that tourism limits parking for local people was again higher for residents located within a village, with 77% displaying some level of agreement, +5% higher compared to wave 1. However, findings also show that agreement with this increased for residents living in both rural (+10%) and city locations (+21%), with the latter previously being the lowest in wave 1.
- In terms of desire to meet with visitors, the highest level of agreement was from those residents situated in towns (64% on par with wave 1). However, previously in wave 1, those living in a city or a rural area displayed the highest level of agreement. However, both locations saw the largest decrease in agreement in wave 2, with the biggest reduction seen from those in a city (-13%), followed by those living in rural areas (-11%).
- In terms of improving investment and development, as mirrored in wave 1, residents living in a city agreed with this more so, seeing an increase of (+26%), compared to the initial summer wave. However, overall those in towns displayed the highest increase compared to wave 1, of +30%. Again, these findings are likely a consequence of cities and more built up areas receiving a higher visitor footfall, and therefore attracting more investment to meet this higher demand.
- Those in a city felt most strongly that because of tourism there are more public transport services available, with this group displaying an increase of +14% compared to wave 1. Moreover, rural areas were the only location to experience a decrease in agreement compared to wave 1 (-14%), reinforcing the issue of connectivity in more rural areas of the county in both the summer and winter in particular.

Main Attraction

- Looking at agreement that tourism is harmful to natural places like the countryside or coastal areas, residents who selected the countryside as their area's main attraction displayed the highest level of agreement **(68%)**, an increase of **+19%** compared to wave 1. This finding highlights the perceived impact to rural areas in particular during the past winter season.

- When looking at agreement with the statement 'there are too many visitors in my local area', residents who perceive their area's main attraction to be the beach/coast expressed the highest level of agreement in both waves. However, the largest increase between the two waves was observed among residents who selected the countryside as their main attraction **(+14%)**. When looking at results for these two questions, findings highlight that residents who are situated in, or have engaged with rural attractions in the winter months, have been most likely to perceive the adverse impacts in terms of increased visits and damage to the environment.

The Kent Downs AONB

- Looking at the responses from those that stated they live within the Kent Downs AONB, findings for wave 2 show that a minority of **32%** agreed that there are too many visitors in their local area, compared to only **12%** in wave 1, an increase of **+20%** in winter 2020. This finding potentially mirrors countywide interpretation around visitors and residents engaging more so with rural and countryside areas during lockdown and in the off-season. Yet, this sentiment may also indicate KDAONB residents feel that particular sites are overcrowded.

- Again, looking at key differences compared to wave 1, results also showed a **-26%** decrease in agreement that residents like to meet visitors in their local area. However, as previously highlighted, this change in sentiment is likely due to wider issues surrounding COVID-19 restrictions and cautiousness around interacting with others during this time of uncertainty.

- Another key finding for KDAONB residents included a significant increase of **+32%** in agreement that tourism helps to improve local investment, development, and infrastructure spending in the local economy, compared to wave 1 findings. Although, a similar increase was witnessed countywide **(+27%)**, this was slightly higher for this segment. This may indicate that during winter 2020 when the survey was completed, residents in these areas were particularly aware of ongoing or planned developments.

District

- In terms of tourism's impact on preserving historic buildings and monuments, residents based in Medway again displayed the highest level of agreement (96%), although this did see a slight decrease of -3% compared to summer. Moreover, in terms of summer versus winter the most notable decrease was from residents situated in Thanet, with an -18% decrease in agreement compared to wave 1. Overall, findings again indicate the appreciation of tourism's contribution towards preservation, particularly in Medway, Dover, and Maidstone, where heritage is prominent, including Rochester Cathedral, Dover Castle and Leeds Castle.
- Looking at agreement with the statement 'tourism is harmful to natural places like the countryside or coast', in wave 2 agreement was highest among residents living in Canterbury and Sevenoaks both 67%. However, when looking at changes by season, those living in Medway and Ashford saw the largest increase of +15%, followed by Maidstone and Swale (both +14%).
- Again, Canterbury residents displayed the highest level of agreement that there are too many visitors in their area (39%), followed by Sevenoaks (35%) compared to the rest of Kent respondents (22%). Both districts also saw an increase in agreement versus wave 1, with Canterbury experiencing a +4% increase in agreement and Sevenoaks a +11% increase. Alongside this, previously Medway and Gravesham displayed the lowest level of agreement, whereas in winter the lowest level of agreement was observed from residents living in Tunbridge Wells (+1%) and Ashford (-2%).
- However, when looking at findings for the above question overall, the biggest difference in sentiment from summer to winter was Gravesham, seeing a +21% in agreement, in addition to Swale (+13%) and Maidstone (+12%). These results highlight that Canterbury residents are most likely to have observed overcrowding in their local area in both summer and winter, potentially due to the districts' varied offering, which includes both rural and coastal destinations, alongside the historic City of Canterbury. However, the significant increase in agreement among Gravesham residents, could potentially indicate that the area's offering appeals more so to visitors in the off-season compared to the summer months.

- Mirroring wave 1 results, residents in Thanet expressed the highest level of agreement that tourism can limit parking availability to local residents, (83%), compared to 73% among all Kent residents. Alongside this, in comparison to wave 1, instead of Canterbury this was then followed by Sevenoaks (82%), which saw one of the largest increases of +10%. Other districts which also experienced a significant increase included Gravesham and Folkestone and Hythe (both +10%), followed by Medway (+9%).
- Results show that in wave 2, Dover residents displayed the highest level of agreement that they like to meet visitors in their local area (72%), a result that is on par with wave 1. While the majority of districts experienced a slight change in agreement, areas that saw a significant change from summer to winter included Gravesham and Tonbridge and Malling, with both seeing a decrease of -16% , followed by Maidstone, (-11%). With the exception of Tonbridge and Malling, there may be a correlation between agreement that there are too many visitors in the local area and a decrease in desire to meet with visitors for both Maidstone and Gravesham. This sentiment could reflect some views that winter visitors were less welcomed, although this is highly indicative of residents being more cautious with regards to COVID-19 restrictions and interacting with others.
- In terms of residents' views on the creation of employment opportunities, districts which experienced the largest change in agreement between waves 1 and 2, included Medway (-19%), Sevenoaks (-18%), Thanet and Folkestone and Hythe (both -17%). This could point towards these areas benefiting more so from summer employment, or alternatively, it could also indicate that the residents of these particular districts were more affected by the pandemic in terms of job losses.
- When looking at tourism's impact on the availability of public transport services available, those residing in Canterbury expressed the largest change in sentiment, with +11% more agreeing with this statement, compared to the initial wave, while those in Gravesham saw the largest drop in agreement of -10%. All in all, areas which benefit from HS1 services such as Ashford, Canterbury and Medway scored the highest again in wave 2, highlighting the benefit this brings to local communities in terms of connectivity and frequency of services. However, the decrease in agreement observed for Maidstone and Sevenoaks in winter (both -6%), again illustrates possible challenges in terms of public transport services in West Kent, alongside Swale (-8%) and Gravesham in the North. Overall, this indicates that there is still a need to address connectivity in more rural regions of the county.

- Looking at local investment and development, residents in Medway expressed the highest level of agreement that tourism helps to improve this, with 88%, and a +36% increase compared to wave 1. This performance may also have been positively influenced by investments and place making initiatives, such as Medway Champions and Place activity, Medway City of Culture bid, Creative Estuary and work around the Rochester Riverside Development. Alongside this, mirroring wave 1 results, Ashford also emerged strongly with 87% agreement and a +20% increase compared to summer. Again, this sentiment may have been aided by coverage of the Ashford Outlet extension, Elwick Place, Newton Works Studio and Ashford For Place Brand.

- In contrast, although still significant, the lowest level of agreement for this was observed from residents residing in Swale (68%) and Sevenoaks (67%). However, the largest increase in agreement between waves 1 and 2 was from residents living in Tunbridge Wells (+40%), followed as already mentioned above by Medway, and then by Folkestone and Hythe (+34%) and Thanet (+32%). The latter also benefitted from the Town Fund, High Street Fund, Heritage Action Zones and the new Community Rail partnership. And in the case of Folkestone and Hythe, positivity may have been aided by recent developments such as the transformation of Folkestone Harbour Arm, F51 skate park and the current town centre plan in progress.

- The percentage of residents that agreed tourism increases prices for local services and amenities was again highest for residents in Canterbury (66%), up +8% compared to summer. This was then followed by residents living in Medway (56%), an increase of +15%, compared to wave 1 results, and Tonbridge and Malling (+10%). However, in contrast those living in Swale expressed a -6% decrease in agreement with this statement, in comparison to summer findings.

- Again, as with wave 1, residents of Canterbury (33%) and Thanet (35%) felt most strongly that tourism reduces their ability to access local services and facilities, most likely reflective of the areas' popular tourism offering and the high visitor footfall, resulting in increased prices. However, Gravesham residents (+19%) and those from Maidstone (+14%) showed the largest increase in agreement from summer to winter.

Key Benefits & Impacts of Winter Tourism

When looking at the key benefits and impacts of winter tourism overall, the below diagram illustrates the top three statements that respondents agreed with the most, while also highlighting the percentages for each from both waves of the survey. All in all, the top three positive impacts of tourism in winter remained unchanged compared to summer, although the percentage of agreement did increase for each statement. However, in terms of ranking, improvement to the local economy came second in wave 2, with the increase in demand for historic and cultural attractions taking precedence.

Furthermore, when looking at areas for improvement, the top three as shown below remained unchanged, with issues around lack of available parking, harm to the natural environment and price increases all emerging strongly in both waves 1 and 2.

Wave 1 (%) Wave 2 (%)

Top 3 Impacts of Winter Tourism in Local Area

1. Increases demand for local historical and cultural attractions — 92% vs. 95%
2. Tourism improves the local economy — 90% vs. 96%
3. Preserves historic buildings and monuments — 88% vs. 93%

Areas for improvement

1. Tourism limits parking available to local people — 73% vs. 71%
2. Tourism is harmful to natural places such as the countryside/coast — 63% vs. 53%
3. Tourism increases prices of local services and amenities — 47% vs. 45%

KENT RESIDENTS SURVEY FINDINGS:

IMPACT ON WELLBEING & EMOTIONAL CONNECTION

02

Impact of Winter Tourism on Wellbeing

This next section of the report presents residents' perceptions of the impacts of winter tourism on wellbeing prior to the pandemic, to identify any connections between tourism and impact it has on the wellbeing of local communities. Again, respondents were presented with a series of statements and asked to rate their level of agreement based on a typical winter pre-COVID in their area. Although these questions aimed to gain an insight into sentiment prior to the COVID-19, due to the unprecedented impact of the pandemic, responses are likely to be skewed to reflect current sentiment also. A full list of questions and percentages for this section can also be found in the appendices.

Resident Satisfaction

As seen in wave 1, a significant proportion of residents agreed that they are satisfied with their life and that they were happy with their lifestyle, indicating that with regards to these factors there is no substantial change by season. However, as illustrated in the visual below, **77%** of residents agreed they feel calm and relaxed and **75%** agreed with the statement 'overall, I feel very excited about my future'. Moreover, both of these statements saw a slight increase of **+5%** compared to wave 1.

These findings could indicate that on the whole, residents are beginning to feel more optimistic for the future and a sense of increased ease, which could have been potentially influenced by the rollout of the vaccination programme.

I feel calm and relaxed 77%

I feel very excited about my future 75%

Both +5% vs. wave 1

BASE = 1260

Impact of Winter Tourism on Emotional Connection

The survey then presented respondents with a list of statements about their perceptions of the impacts of winter tourism on their emotional connection to their local area prior to COVID-19. The following headings present findings for statements that showed a difference between waves 1 and 2.

The Natural Environment

Respondents were asked to rate their agreement with the statement 'tourism protects and enhances the natural environment'. Findings show that **51%** of residents selected some level of agreement, a **-4%** decrease compared to wave 1. Similarly to wave 1, results for wave 2 still indicate that the majority of residents feel tourism does protect and enhance the environment, however, this decrease also mirrors previous agreement that tourism is harmful to natural places. In all, these findings may again be reflective of the increased interest and footfall to countryside areas over lockdown. Furthermore, results show that there is still an opportunity to raise the awareness of current environmental efforts and to increase activity in particular areas of the county where these perceptions are felt more strongly.

Connection to the Local Area

Looking at agreement with the statement 'I live in a beautiful area', findings for wave 2 show that this was **+4%** higher compared to the initial wave (**86%** vs. **82%**). This increase in sentiment could be due to residents spending more time in their local area, due to increased COVID-19 restrictions and the imposed national lockdown.

86% of residents agreed that they live in a beautiful area*

+4%

With regards to other statements included in this section, residents displayed a similar level of agreement in wave 2 compared to wave 1 on issues such as feeling financially secure and safe. Alongside this, results from both waves also show a similar sentiment around satisfaction with living in their local area. In addition, the majority of respondents agreed that winter tourism would not be a reason for them to move away and that having visitors around them does help them feel more strongly connected to the area.

*% of agreement is a combination of percentages of those that selected- 'strongly agree', 'agree' and 'somewhat agree'.

After being asked to rate their level of agreement with the statement 'tourism protects and enhances the natural environment', the survey also gave respondents the opportunity to give some additional information to further explain their views. The points aim to give a summary of comments provided, by those that selected a level agreement and disagreement, with the aim to offer a more in-depth understanding into residents' perceptions on how tourism activity can positively or negatively impact the natural environment.

<u>Comments – Disagreement</u>

- Overall, residents felt that tourism can only protect or enhance the natural environment when planned and managed effectively. However, it needs to be implemented responsibly, and relies on tourists to respect the environment, which is dependent on effective education of visitors, in addition to appropriate communication and messaging from destinations to help facilitate this.
- A common response gave details on how tourism activity can have a detrimental effect on public footpaths alongside natural habitats and litter pollution to countryside and coastal spots.
- Another concern that arose included the negative impact tourism can have in terms of increasing traffic congestion, noise and issues with lack of parking availability for local residents.
- Comments specific to coastal areas included damage and erosion to cliff landscapes and litter on beaches. For the countryside responses included the need for visitors to better understand and respect the countryside code.
- Findings also highlighted that some residents feel the natural environment is being adversely impacted by infrastructure expansions, such as new housing and hotel developments. This also included residents stating that new developments should ensure that existing natural assets and architecture are protected, as these are integral to Kent's tourism landscape and appeal. These insights indicate that it is essential that new developments are carried out sustainably, ensuring that there is minimal damage to the natural environment and that the correct procedures are followed in terms of public consultation and offsetting any negative changes to the area.

- Overall, it is fairly evident that residents do acknowledge that revenue from tourism does help to protect the natural environment, through funding opportunities and reinvestment into assets such as public foot and cycle paths and conservation work. However, residents feel that tourism can also bring considerable damage and pollution to natural areas and it is fundamental that local authorities work to protect places of interest that are needed to maintain the local economy and resident wellbeing.

<u>Comments – Agreement</u>

- Looking at comments from residents that agreed with this statement, residents strongly acknowledged the impact tourism has in terms of attracting inward investment and project funding opportunities, which in turn can benefit the environment.

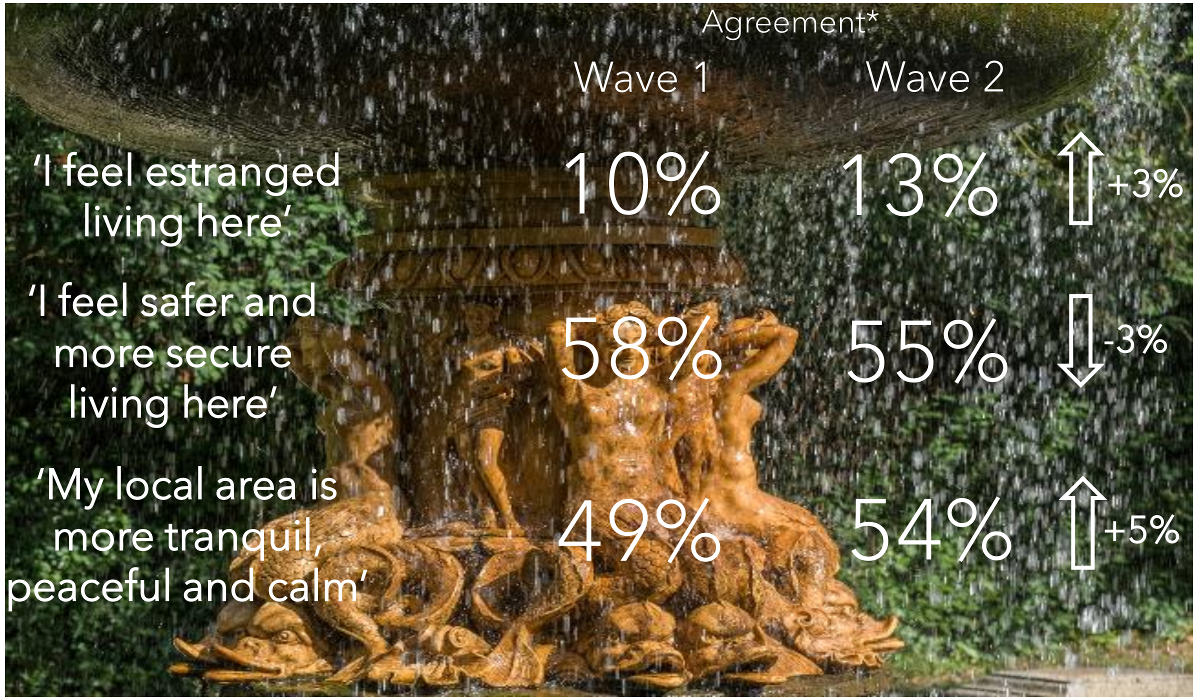
- Alongside this, comments also included that tourism can help to keep local parks and buildings operating and maintained, while also encouraging facility creation at local country parks and beaches, including foot and cycle paths. Consequently, these improvements and opportunities help to protect and enhance the county's natural environment for future visitors and residents.

- Overall, responses certainly capture the sentiment that tourism demand and interest in visiting local areas is a catalyst for both local development and preservation. This demand may also provide the motivation to safeguard landscapes such as beaches, cliffs and rural areas that might otherwise suffer due to lack of revenue generation.

- The quality of the county's natural environment is an integral component of Kent's appeal and is therefore something that should be protected. To achieve this, it will be vital that procedures are put in place to ensure that visitor footfall is managed effectively particularly in tourist hotspots, and natural sites that are already fragile.

Resident Satisfaction

The next section of the survey looked at any changes in residents' emotional connection to their local area, brought about by the impact of the COVID-19 pandemic. Firstly, respondents were asked to rate their agreement with the statement 'my local area is more tranquil, peaceful and calm', with results showing that **54%** of respondents agreed with this statement to some degree. This finding shows that the majority of Kent residents feel that their local area is more peaceful and calmer post-pandemic in winter 2020, a result that is also **+5%** higher compared to wave 1. Overall, this could be reflective of increased time spent at home during this period compared to summer 2020 when lockdown restrictions were eased, which may have given some residents time to slow down and explore their local area. When looking at other statements that show a difference in comparison to wave 1, as illustrated in the diagram below, a slightly higher percentage of residents agreed with the statement 'I feel estranged living here' **(+3%)**. Alongside this, **55%** of residents agreed with the statement I feel safer and more secure living here', compared to **58%** in wave 1.



*% of agreement is a combination of percentages of those that selected- 'strongly agree', 'agree' and 'somewhat agree'. BASE = 1260

Although these only reflect small differences in agreement, the changes in sentiment around security and attachment to their local area, may be reflective of seasonal changes in terms of reduced access to local facilities due to COVID-19 and less light in the evenings.

Residents also displayed a similar level of agreement that post COVID they would not move away from their local area, with just under **75%** of residents agreeing with this in both waves. In addition, agreement with the statement 'I feel more strongly connected to my local area' was on par in winter compared to wave 1 (**65%**), with an increase of only **+2%** agreeing that they dislike living in their local area in winter versus summer 2020. Overall, results indicate that post pandemic, residents still feel a strong emotional connection to their local area, despite the fact that for the majority of that period residents were confined to their homes and immediate local area.

Impact on Emotional Connection- By Respondent Type

Location

Mirroring wave 1, wave 2 results show that residents living in rural **(96%)** and village **(94%)** areas displayed the highest level of agreement with the statement 'I live in a beautiful area', compared to **86%** among all respondents. However, in terms of percentage changes, the most notable difference across both waves was observed from residents living in a city, seeing a significant increase of **+19%,** compared to wave 1. Again, findings certainly highlight the sense of pride among those in rural locations and the strength of Kent's strong countryside offering. Though, the increase in pride in city areas in the off-season may indicate the appeal of this type of location in the winter months, including festive activities and shopping opportunities.

Main Attraction

Residents who selected the countryside as their area's main attraction felt most strongly connected to their local area post-pandemic, a finding also seen in wave 1. Furthermore, the percentage of residents that selected some level of agreement also saw a **+5%** increase in winter compared to wave 1. This again illustrates the positive impact that living in rural areas can have on emotional connection and wellbeing, which is strengthened further in the winter months.

District

- Findings show that residents of Tunbridge Wells (55%) displayed the highest level of agreement with the statement 'having visitors around helps me feel more strongly connected to my local area'. Although, looking at changes by season, the most significant change was from those living in Dover, who previously in wave 1 displayed the second highest level of agreement. However, wave 2 results show a -12% decrease in agreement in winter among Dover residents.

- In terms of agreement with the statement 'I live in a beautiful area', residents from Canterbury expressed the highest level of agreement (94%), although the largest increase in agreement was seen from those residing in Swale (+12%), compared to wave 1. In contrast to this, the percentage of residents agreeing with this in Dover saw a -6% decrease compared to wave 1. Overall, findings may indicate that Swale and Canterbury are perceived more positively in the off-season, while Dover is more appealing to residents in the summer season, most likely due to having a more predominant coastal offering.

The Kent Downs AONB

- In wave 2, 82% of residents living in the Kent Downs AONB agreed on some level that their local area is peaceful and calm, compared to 70% countywide. Similar to wave 1, this result may indicate the benefits that rural areas can have on resident wellbeing.

- A higher proportion of KDAONB residents agreed that they live in a beautiful area (96%), compared to Kent-wide results (86%). This +10% increase in agreement further supports the notion that living in more rural locations can aid towards quality of life and a sense of pride.

- When looking further at summer versus winter sentiment, results also show a -22% decrease in agreement that tourism protects and enhances the natural environment (71% vs. 49%). This drop in agreement could be reflective of increased visits to countryside areas during the winter period, which may have negatively impacted the perceptions related to the environment in terms of overcrowding, pollution, and litter.

KENT RESIDENTS SURVEY FINDINGS:

SOCIAL, CULTURAL & ECONOMIC IMPACTS: POST-COVID

Social and Cultural Risks Post COVID-19

In order to continue monitoring the impact of the COVID-19 pandemic, the survey also looked to gain an insight into various perceived social, cultural and economic risks facing residents' local area. To achieve this, as in wave 1, respondents were presented with a series of statements regarding tourism in winter 2020, to establish any changes in sentiment from the initial summer wave. A full list of questions and percentages for this section can also be found in the appendices.

Firstly, residents were asked to select the statement that best defined their winter 2020 activity, in terms of trips taken from home. As illustrated in the graph, and as expected due to COVID-19 restrictions, the vast majority of Kent residents stayed at home because of the pandemic (91%), a +28% increase compared to wave 1 results. Alongside this, findings also show that in winter 2020, in total only 2% of residents went on a trip outside of the county.

When cross-referencing activity with age category, findings again show that residents over 65 were more likely to have stayed at home because of COVID-19 (93%), compared to residents aged 18-34 (86%). Similar to wave 1, this slight difference in activity is likely due to the increased health risk of the virus to older age groups.

As expected, due to national COVID-19 restrictions, 91% of Kent residents stayed at home during winter 2020, a +28% increase compared to wave 1

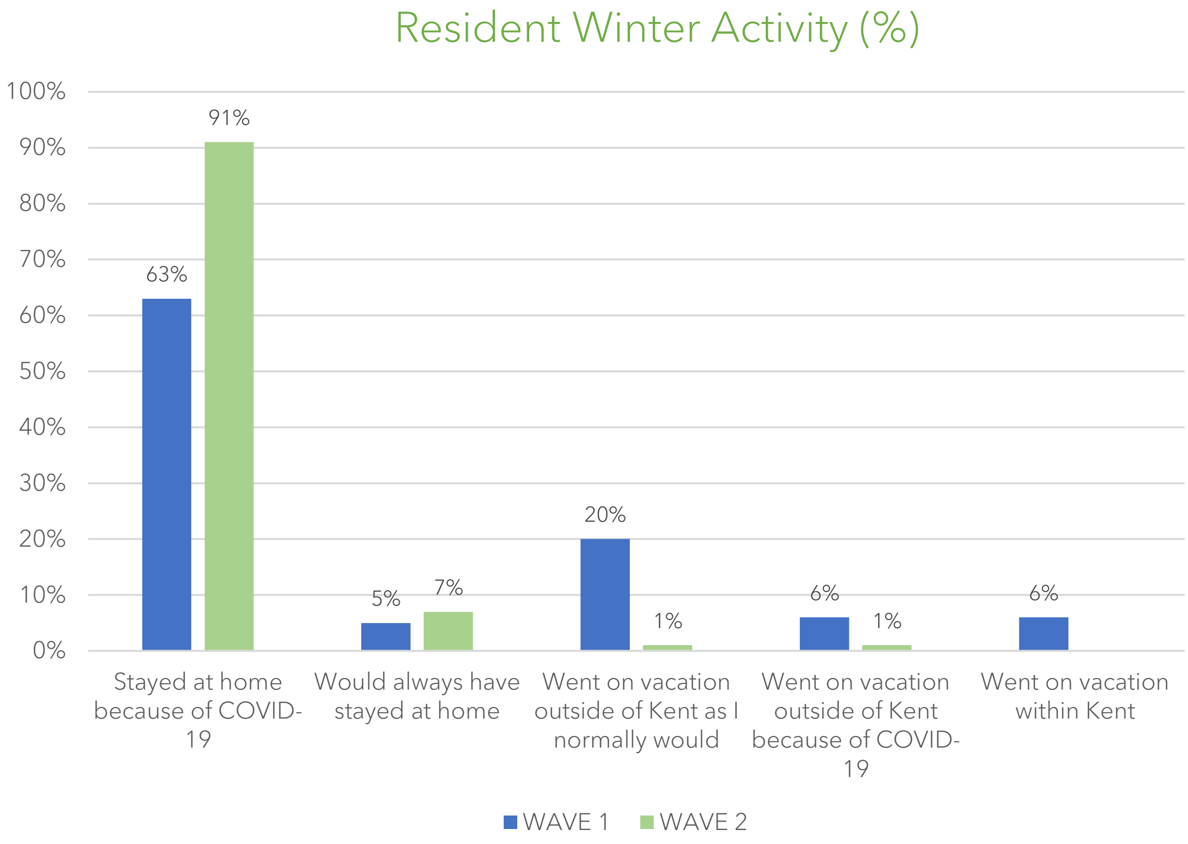


Figure 8: Graph showing the % of respondents and their 2020 winter activity BASE=1260

Change in Visitor Numbers

Respondents were then asked if they had observed a change in visitor footfall to their local area during winter 2020, as a result of the pandemic. Findings show that the largest proportion of respondents (**47%**) felt that visitors to their area had reduced either a little or a lot, **+6%** higher compared to wave 1. These findings are likely illustrative of the overall impact of the pandemic, with residents perceiving a larger increase in footfall during summer 2020, when restrictions were eased. Other factors such as the Eat Out To Help Out Scheme and good weather conditions in the summer months may have also aided this.

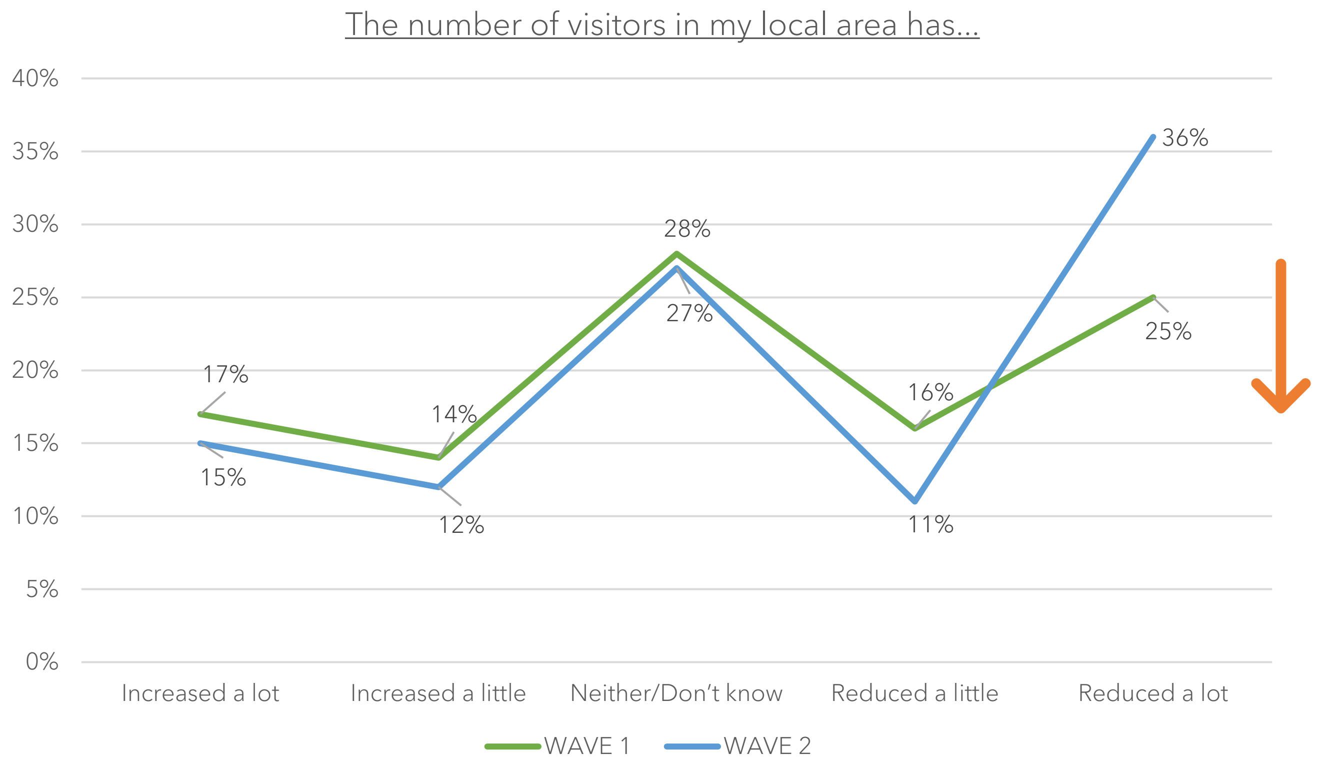


Figure 9: Graph showing changes to visitor footfall BASE=1260

Participation and Availibility

A series of statements relating to the availability of cultural attractions and participation in local events and recreational facilities were tested. Firstly, in terms of the availability of recreational facilities and opportunities, both waves saw over **70%** of residents stating they feel this has decreased, although the proportion selecting this has 'reduced a lot' was **+13%** higher compared to wave 1. Alongside this, **72%** of residents felt the number of cultural attractions available to visit such as exhibitions and events had decreased, compared to **64%** in wave 1, with **+17%** more residents specifying this had 'reduced a lot'.

Consequently, the survey asked respondents about their participation and engagement with local attractions and activities. Results show that **+4%** more residents specified the number of locals using attractions and facilities had decreased **(44%)**, compared to wave 1 **(40%)**, which included **+11%** more selecting this had 'reduced a lot'. However, in terms of engagement with cultural and recreational activities, the percentage of residents specifying this had decreased in winter is fairly consistent with summer sentiment, with **-3%** reduction in those selecting this has decreased compared to summer 2020.

Overall, findings for these questions are fairly reflective of the national picture in terms of the implications of COVID-19 restrictions and attractions and hospitality businesses that had to close for the majority of the winter period. However, findings do illustrate that resident participation with cultural and recreational activities was less impacted, which could be due to residents still engaging in outdoor recreational activities or outdoor cultural sites and installations.

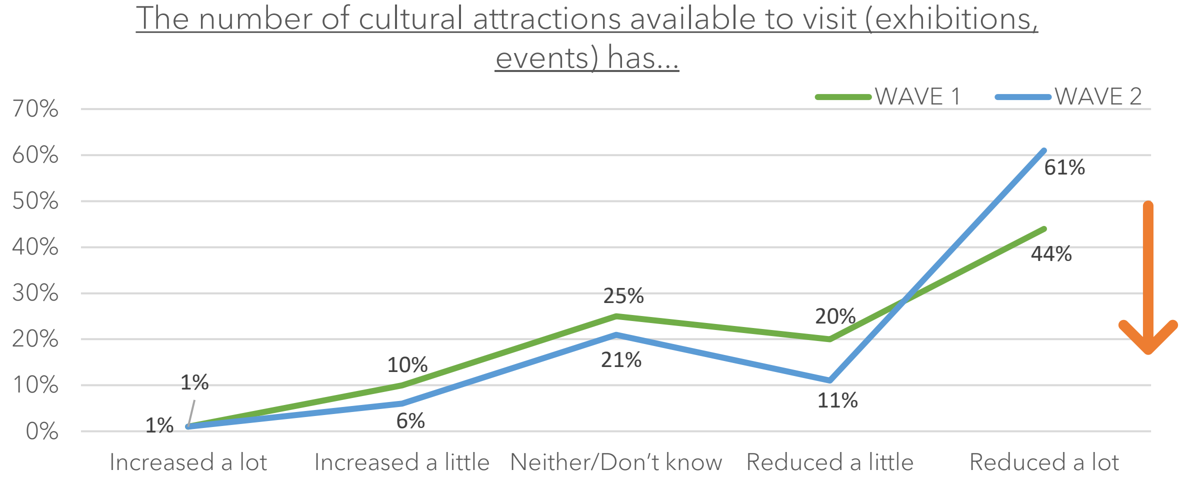


Figure 10: Graph showing changes to the availability of cultural attractions BASE=1260

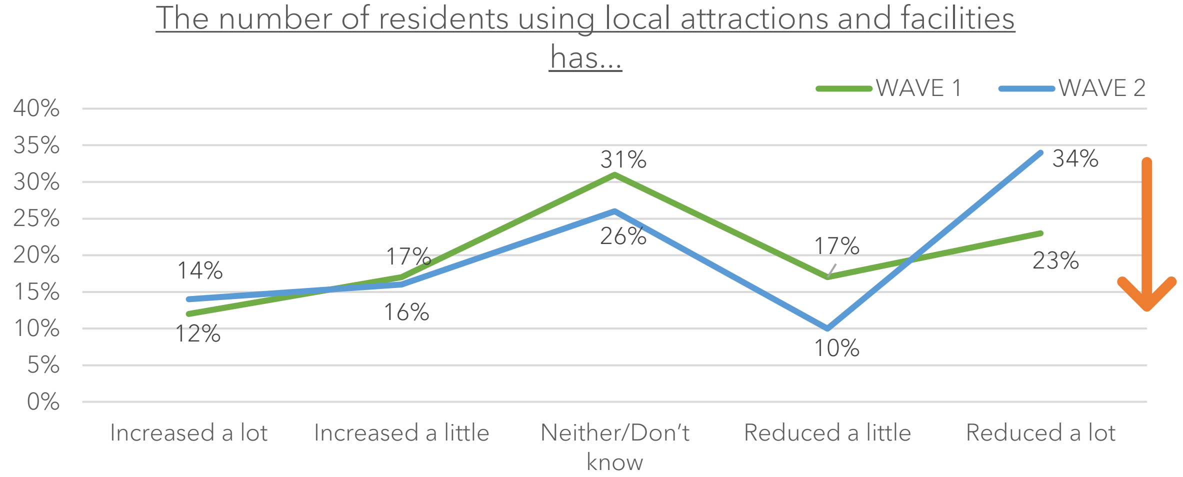


Figure 11: Graph showing participation with local attractions and facilities BASE=1260

INCREASE IN VISITORS

- Findings show that +10% more residents who observed an increase in footfall during winter, felt that the number of cultural attractions available to visit had reduced compared to summer.
- Again, rural areas saw the largest increase in visitor footfall, with a +9% in overall agreement, compared to wave 1 in summer. Cities also saw a +6% increase in winter, indicating the appeal for these types of destinations in the off-season.
- Previously, residents who perceived the beach/coast as their area's main attraction observed the highest increase in visitors in summer 2020, whereas in winter the countryside took the top spot, seeing a +16% increase compared to summer, with all other types of attractions seeing a slight decrease in footfall.
- The proportion of residents that observed an increase in visitors in winter was +10% higher among residents living in the KDAONB, compared to countywide figures (37% versus 27%).
- Residents living in Sevenoaks (45%) and Folkestone and Hythe (40%), observed the largest increase in visitor numbers during winter, while those residing in Gravesham (+25%) and Sevenoaks (+14%) displayed the highest increases compared to summer.

DECREASE IN VISITORS

- As expected, mirroring summer 2020 results, findings show a correlation between a decrease in visitors and a decrease in the number of residents using local attractions and recreational facilities.
- Residents living in towns observed a decrease of -8% in visitor numbers during winter, compared to summer 2020.
- Residents from Ashford, Dover and Medway all observed the largest decrease in footfall in winter (all 56%). Although when comparing results to wave 1, the biggest change in responses came from those living in Thanet and Ashford, with both seeing an increase of +17% in residents observing a decrease in footfall compared to summer. Subsequently, residents in these districts also saw a decrease in residents using local attractions.
- Previously 51% of Canterbury residents observed an increase in footfall in wave 1, however in winter the largest proportion (47%) observed a decrease, an increase of +9% in those observing this decline.

Quality of Life

Looking further into the social impact of COVID-19 over the winter period, respondents were asked if the quality of life for residents has been affected. Findings show that **48%** of residents felt this had either 'reduced a little' or 'reduced a lot' their quality of life, although the largest proportion (**37%**) of residents selected 'neither/don't know'. Furthermore, when comparing results against those from the initial wave, findings are on par and show a similar level of sentiment in both seasons.

Looking at findings for this question by perceived main attraction, a smaller proportion of residents in areas where the main attraction was perceived to be the coast/beaches (**-5%**) stated that their quality of life had decreased compared to wave 1. Furthermore, as highlighted in wave 1, the negative impact on quality of life for residents in coastal areas could be due to increased footfall and overcrowding at popular beach spots. However, moving into the off-season with less favourable weather conditions and therefore a decrease in visits to the beach, this may have resulted in a better quality of life for residents.

In contrast, from the residents who selected the countryside as their main attraction, **47%** felt their quality of life has decreased, an increase of **+8%** compared to wave 1 results. While, the majority still did not feel the quality had decreased, of those that did, this could be attributed to increased footfall to more open and rural areas during lockdown. Lastly, when looking at results by district, those living in Canterbury **(-14%)**, exhibited the largest decrease in quality of life during winter 2020, which again could be due to COVID-19 restrictions and closures impacting residents' ability to access local attractions and facilities, that traditionally contribute greatly towards their quality of life.

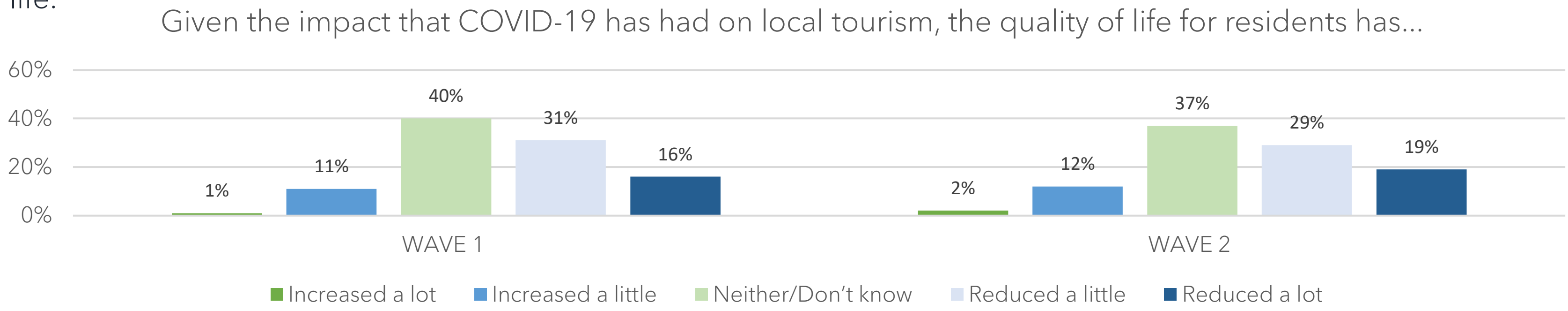


Figure 12: Graph showing the impact of COVID-19 on quality of life BASE=1260

Economic Risks Post COVID-19

Financial Impact of COVID-19 on Household

The survey also looked to gain an insight into how Kent residents have been impacted financially following the pandemic. Firstly, respondents were asked to specify to what degree their household's financial situation has been affected. As illustrated in figure 13, the largest proportion (**55%**) of residents stated this had 'stayed the same', a finding that was also found in wave 1. However, this was then followed by **30%** specifying they are worst off monetarily due to the pandemic. The percentage of residents that stated their finances have improved was **+7%** higher in wave 2 compared to wave 1.

When looking at this increase by demographic, residents aged 65 and over saw the largest improvement to their household finances compared to summer, with an increase of **+9%**, closely followed by those aged 18-34 years **(+8%)**. Alongside this, when cross-referencing improvement in finances by job status, residents who stated they are employed full-time, saw the largest improvement compared to summer 2020 **(+9%)**.

Overall, the improvement to residents' financial circumstances may be due to several factors, and although a second lockdown was imposed at the start of November, it was also announced that the furlough scheme would be extended. This announcement may have boosted residents' financial security, alongside the likelihood that many people may have returned to work following a period of furlough and a return to their usual income. It can also be an indication of the fact that not being able to do as many things as they normally would meant those costs were saved.

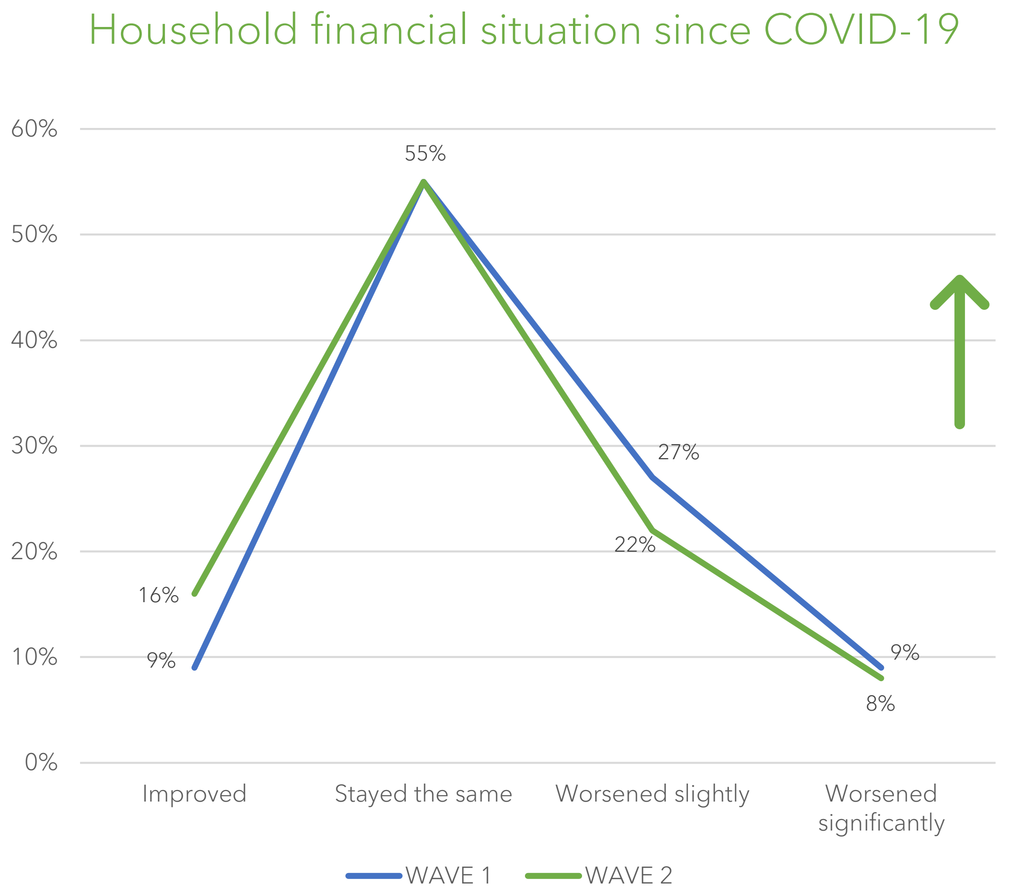


Figure 13: Graph showing the % of respondents and the impact on their household finances following COVID-19 BASE=1260

Local Investment & Infrastructure

The survey then looked to measure residents' sentiment on other economic factors their local area may be facing. When comparing findings from the most recent wave with results from wave 1, residents were less likely to agree that local investment, development, and infrastructure is declining, with +5% more residents disagreeing with this statement in winter compared to summer. This finding supports previous sentiment outlined in the report, around the impact of tourism on local investment and development opportunities, whereby in the off-season this is perceived more positively.

Transport Services

Respondents were then asked to rate their agreement with the statement 'local transport services are improving', with results showing that a similar proportion of respondents agreed with this statement across both waves. However, a higher proportion of residents who completed the survey in winter (+7%) disagreed that services had improved. Findings for wave 2 also show that residents who observed an increase in visitors to their area were more likely to have seen an improvement in transport, a point that was also highlighted in wave 1. Overall, it is likely that areas more popular with visitors will benefit from better connectivity and increased public transport services, with many other areas, and most likely those that are rural, not having as many services on offer in the off-season. This shows that this is still an area for improvement, and will be of particular importance when looking to develop off-season experiences. These will require reliance on the availability and reliability of public transport services within the county, to facilitate visits, whilst continuing to fulfil a sustainable and low carbon footprint agenda.

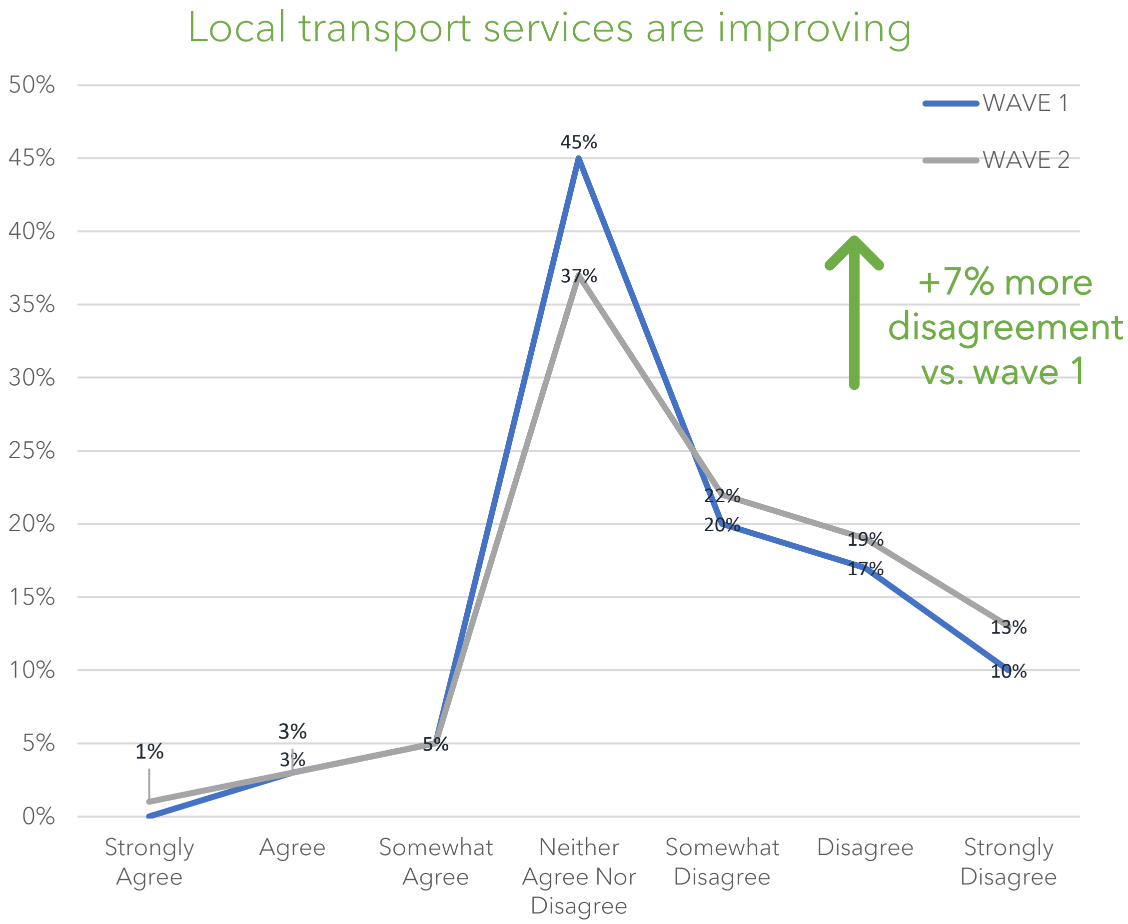


Figure 14: Graph showing the % of respondents agreeing that local transport services are improving BASE=1260

In terms of other statements included within this section, results were fairly consistent across both waves, i.e. the agreement that local infrastructure such as public toilets, car parks and footpaths are improving, with just under 60% of residents disagreeing with this in both waves.

Results were also on par compared to wave 1 when looking at agreement that the local visitor economy is declining and availability of employment opportunities stemming from tourism are decreasing. Three quarters of residents agreed with the latter and just over 70% with the former in both the initial summer and winter waves of the survey.

This sentiment is one that will likely be short-term and caused by the impact that the pandemic had on the tourism industry and on the opportunities and benefits it traditionally provides. Moving forward, it will be useful to continue to track any changes in sentiment, to see when tourism activity and travel can fully resume, these factors will improve in the minds of local residents in summer 2021.

KENT RESIDENTS SURVEY FINDINGS:

KEY IMPACTS OF TOURISM & OVERALL SUPPORT

04

Top 3 Positive & Negative Impacts of Tourism

This section of the report looks to outline findings from the survey which asked respondents to specify the top three positive and negative impacts of tourism on their local area. In asking respondents this, it not only allows for the main pros and cons from the perspective of residents to be identified, but also captures more details as this was an open-ended question. The diagram below highlights the top ten positive impacts of tourism on their local area cited by respondents. These have been ordered by the frequency in which they were mentioned.

Positive

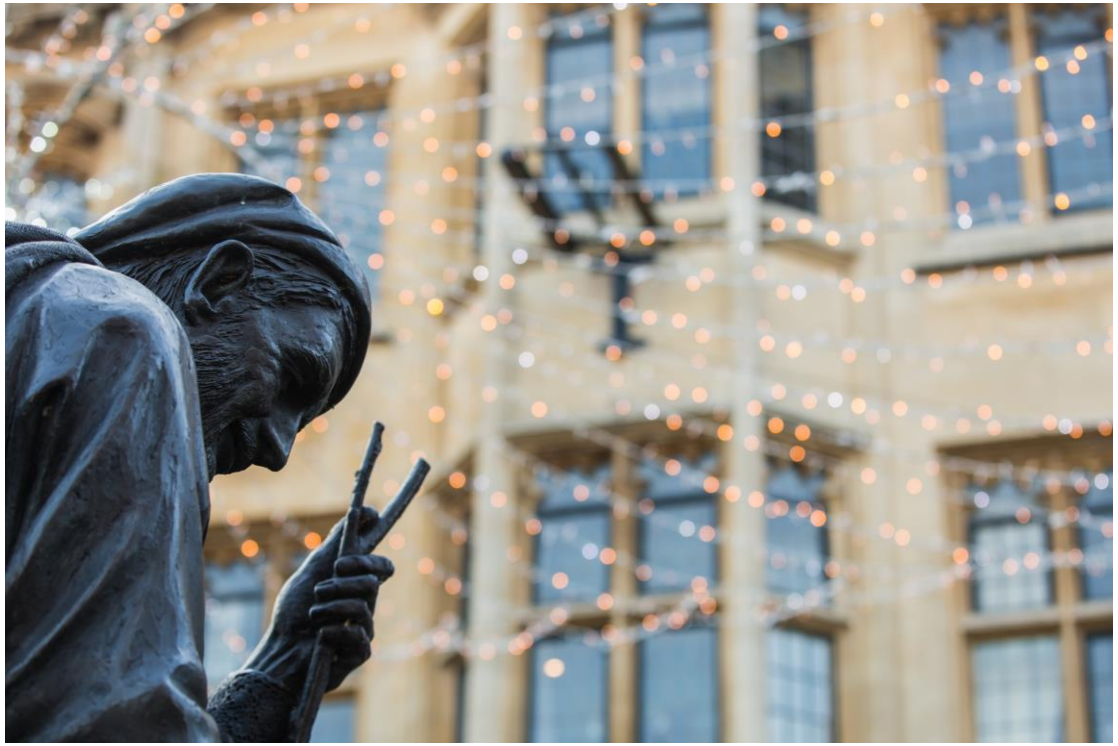
1	**Supports jobs** - Increases local employment opportunities	2	**The Economy** – Tourism activity boosts the local economy, bringing money to the local area
3	**Business benefits** - Supports small local businesses, greater number of businesses able to operate and benefit from spending	4	**Attracts investment & improves local facilities** – Increases the quality of infrastructure and local services and amenities
5	**Attractions & events** – Range of attractions to visit and events on offer for locals to enjoy, including arts and cultural sites	6	**Quality food and drink** – Variety of pubs, cafés and restaurants on offer
7	**Preservation of historical sites** – Helps to maintain and keep attractions open	8	**The beach** – Lovely choice of beaches for locals to enjoy and visit
9	**The countryside** – Quality of rural areas such as country parks, other countryside areas and cycle routes	10	**Promotes local area** - Increases interest in, and visibility of the local area and attracts new and diverse audiences

The diagram below then highlights the top ten negative impacts of tourism on residents' local areas. These again have been ordered by the frequency in which they were mentioned.

Negative

1. **Litter/pollution** - Increased litter and mess left by tourists
2. **Parking** - Lack of available parking, inconsiderate parking and increased costs
3. **Traffic** – Congestion, busy roads and air pollution
4. **Anti-social behaviour** - Increased anti-social behaviour and crime as a result of increased visitors
5. **Damage to environment** – Harm caused to rural areas, natural habitats and wildlife
6. **Overcrowding** - Too many visitors and people in local area
7. **Increased prices** - Increased house prices in the area as a result of tourism
8. **Lack of local investment and facilities** - Including attractions, local transport and toilet facilities
9. **Beach** - Increased pollution, overcrowding and inconsiderate behaviour on beaches in particular
10. **Town centre** - Concerns around empty shops, overcrowding in some places and a need for improvement in these areas

Responses show that the most commonly cited positive impact of tourism was the facilitation of local employment opportunities, followed by the contribution it brings to the local visitor economy, mirroring wave 1 results. Alongside this, again residents expressed that as a result of tourism activity, smaller local businesses are able to benefit, allowing them to continue to successfully operate. In addition, residents showed strong awareness and recognition that tourism activity can help to attract inward investment opportunities, which can lead to the improvement of local facilities and services. Findings for this question also highlight the importance of local attractions and events in terms of quality of life, with residents in particular citing the quality of attractions, art and cultural sites and local events for residents to enjoy.



Similar to wave 1, the top ten positive impacts of tourism recognised by locals also included the range and quality of food and drink venues on offer, including pubs, cafés and restaurants, which ranked in 6th place in wave 2, compared to 9th in the initial summer wave. Furthermore, this increase may potentially represent an increase in interest in the county's food and drink offer in the off-season. Other areas mentioned also included the quality and range of both coastal and rural areas, which are both integral to Kent's tourism landscape, with this also demonstrating a sense of local pride in these assets. Lastly, as previously highlighted in the report, residents expressed that tourism is vital in terms of keeping attractions open for locals to enjoy, alongside being able to use revenue to reinvest back into preserving historical sites of interest.

In terms of the perceived negative impacts of tourism, again as in wave 1, responses remained fairly consistent, with concerns around littering, availability of parking and traffic congestion being cited most frequently. Residents also felt strongly that tourism is causing damage to rural and coastal areas, with factors such as littering and overcrowding mainly being responsible. All in all, results illustrate that there is still a need to further address issues around overcrowding and pollution in certain locations, alongside initiatives and messaging to help ease pressure on roads and local parking locations.

Additional Comments

Finally, the survey also gave residents the opportunity to leave any additional comments they might have about the impact of tourism on their local area, or regarding the answers they gave throughout the survey. The following diagram presents a sample of comments given by respondents that capture the common themes identified when analysing responses.

"COVID has obviously decimated Canterbury's tourist trade over the last 12 months. The next test will be to see how much of a negative effect Brexit will have, as this is impossible to tell at the moment"

Male, 18-34, Canterbury

"Tourism & Hospitality supports many jobs and resources - it needs a wider, more sustainable approach and be better managed and supported at a local/ regional/ national level"

Male, 35-64, Dover

"Post COVID there is an opportunity to promote the area and take advantage of everyone's desire to get out and about. Improved public transport would help"

Female, 35-64, Dover

"It would be nice to have more winter things in a coastal town"

Female, 35-64, Folkestone & Hythe

"We need some more beachfront investment in facilities, and planning permission for development e.g.: seafront restaurants, cafes"

Male, 35-64, Swale

"Litter - it's a big issue and needs urgently addressing"

Female, 35-64, Dover

"COVID-19, for their permitted recreation, has increased visitors that would not normally have an interest in rural locations and have little or no respect of the "country code" and the impact of their actions"

Female, 65+, Maidstone

"Tourism is a positive thing and off-season we should encourage more people to visit"

Female, 18-34, Ashford

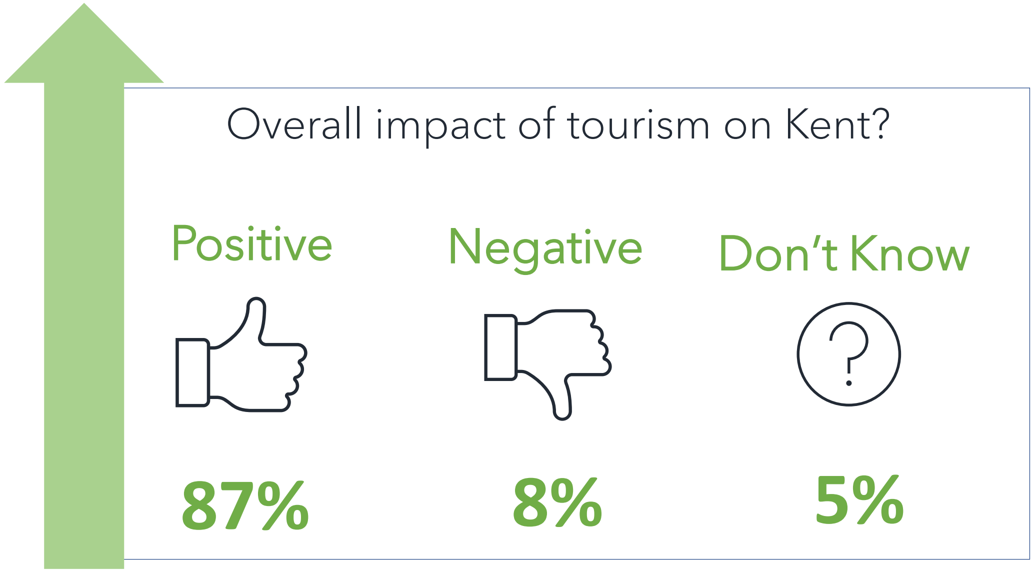
"More investment in infrastructure such as roads, signage etc is needed to reduce overcrowding during the height of the season"

Female, 35-64, Swale

Overall Support

Finally, the survey looked to gain an insight into respondents' overall feelings and support around winter tourism in their local area. As illustrated in Figure 15, when asked to rate their agreement with the statement 'I support winter tourism in my local area', **85%** selected either 'strongly agree', 'agree', or 'somewhat agree', with the largest proportion (**39%**) selecting 'agree'.

Following this, respondents were asked what they felt the overall impact of tourism on Kent was, with results showing that the majority (**87%**) felt this was positive. Overall, results indicate that respondents have a strong sense of support for winter tourism in their local area, with residents displaying a similar sentiment in wave 1, based on summer tourism.



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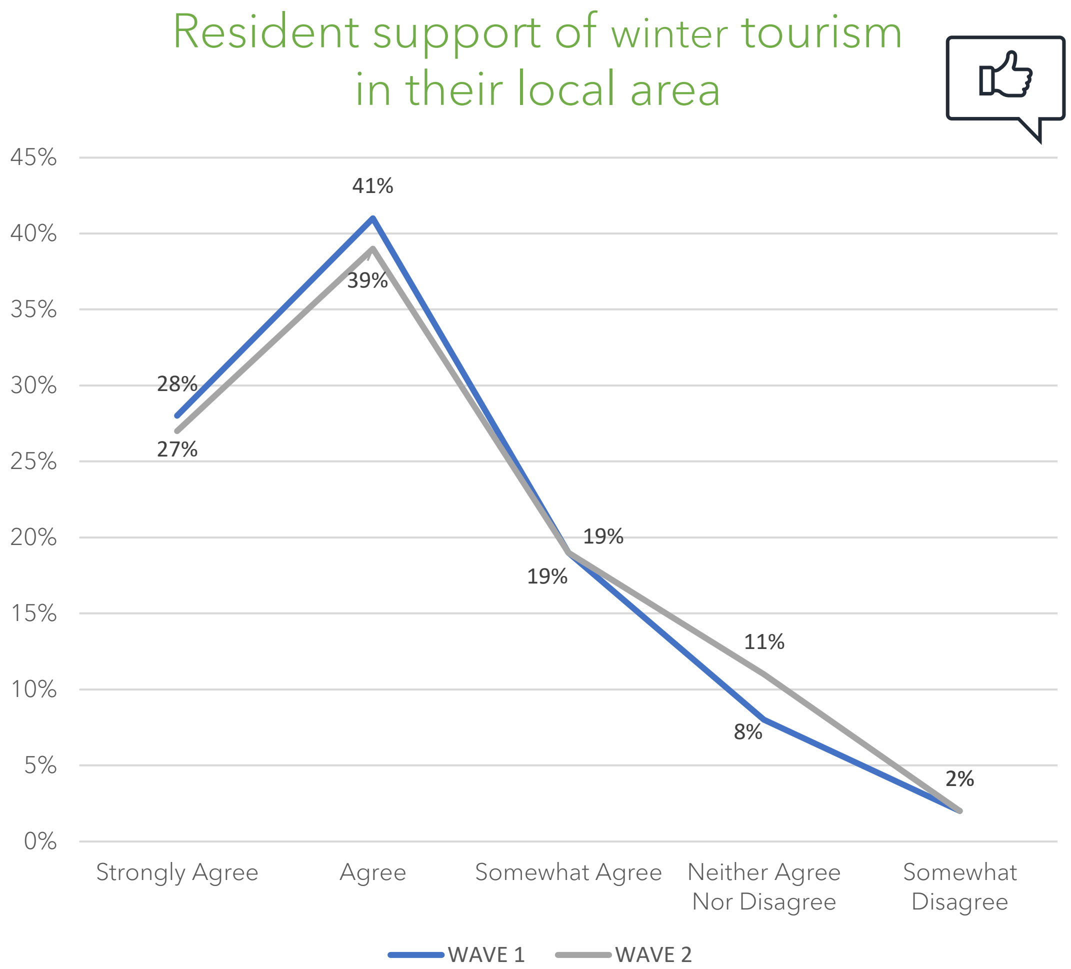


Figure 15: Graph showing the % of respondents and their level of agreement with the statement 'I support winter tourism in my local area' BASE=1260

Key Findings & Recommendations

Increased Engagement with the Countryside in Winter

- Overall, findings indicate that there was a higher level of engagement and recognition of countryside areas in winter in comparison to summer. This included a high proportion of residents selecting the countryside and outdoor sites as their main attraction, which supports opportunities to promote these types of activities and experiences in the off-season.
- This interest was also higher among the younger demographic, indicating that experiences around these areas may potentially hold appeal to this demographic moving forward.
- Results also show that residents living in rural areas and those in the KDAONB were more likely to have observed an increase in visitor footfall compared to summer. This is likely due to the implications of the lockdowns and COVID-19 restrictions, whereby residents sought out more open and rural locations to visit.
- Furthermore, it will be important to track any changes in sentiment of those residents living in countryside areas moving forward, alongside ensuring that activity to increase off-season visits and experiences doesn't result in overcrowding popular countryside locations.

Harm to the Environment

- Residents were more likely to feel that tourism is harmful to natural places in the winter compared to summer. However, this unease can certainly be seen in both waves, with results likely influenced by the increasing pressure and attention that damage to the environment and sustainability is gathering, further accelerated by coverage in the media. This sentiment is likely a combination of increased awareness of wider issues and the influx of visits to outdoor spaces during this period.
- Results demonstrate the need to raise awareness and communicate current environmental efforts and to increase conservation in areas where residents may feel this negative impact more strongly. Results also show that tourism activity needs to be planned and managed effectively with regards to environmental impacts, with a heavy reliance on tourist behaviour. Therefore, it will be important to focus on effective visitor education through appropriate communication and messaging to help facilitate this. For coastal areas, main issues include damage and erosion to landscapes and litter on beaches, whereas for the countryside there is a need to ensue visitors fully understand and comply with the countryside code.
- Activity and communication with residents should also aid to share information on how revenue is being reinvested into improving aspects such as cycle and footpaths, alongside initiatives such as beach clean-ups.

Historical and Cultural Preservation

- Residents still strongly acknowledge the value tourism can bring to preserving historical and cultural attractions and to driving demand. Therefore, there should a continued effort to reinvest income and to access funding streams to further maintain and preserve these sites, which can greatly contribute towards the county's appeal and local sense of pride.

Parking Availability Concerns

- Results also indicate that lack of available parking for local people was still a concern in the winter season. Therefore, this still represents an opportunity to increase satisfaction among residents and this should continue to be a factor that is tracked in future waves of the survey.

Contribution to the Local Economy and Employment Opportunities

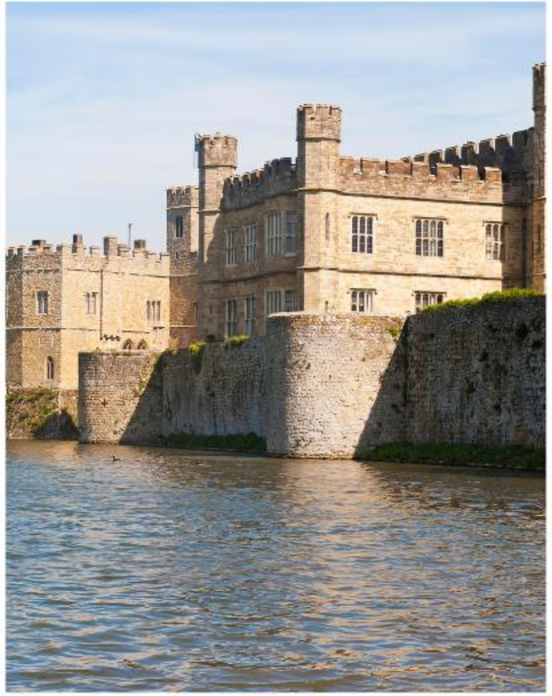
- Similar to wave 1, although residents do acknowledge the benefits tourism can bring to the local economy and employment, the slight decrease in agreement with this is most likely reflective of the fact that winter is traditionally a less prosperous period for local tourism businesses compared to the summer season.
- Residents also felt that overall benefits to these areas are decreasing, and as seen in wave 1, this is likely due to the impact of the pandemic and it is likely to be a shorter term perception. However, it will be vital to continue to monitor and track changes in sentiment in future waves, to see whether these factors will improve when tourism activity and travel resumes.

Need for Better Transport and Connectivity

- Findings also show that there is still a need to improve transport services and connectivity to particular areas, including rural destinations and locations in West and North Kent, such as Swale and Gravesham. This is also an area that will be of particular importance when looking to develop off-season experiences, as the use of public transport will continue to fulfil the transition towards becoming a more sustainable, low carbon destination.

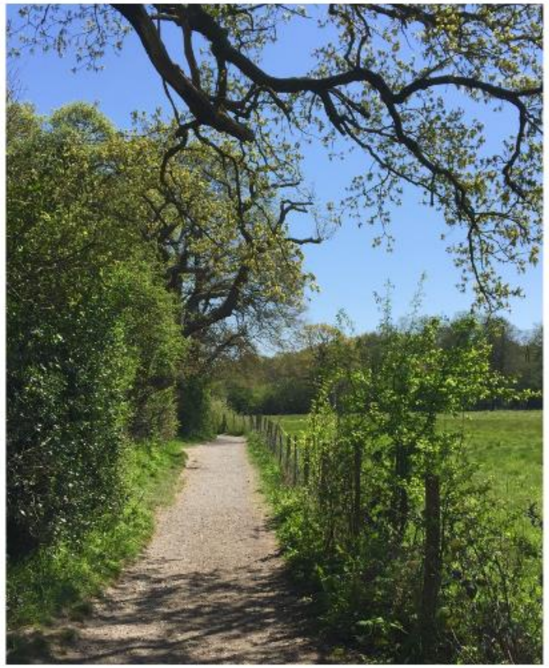
Recognition of Local Investment and Development

- Overall, there was a much stronger acknowledgement and agreement that tourism drives local investment and development. However, looking at the wider picture, due to the reduction in visitors as a result of the pandemic, this may have highlighted the importance and reliance on visitor spend and investment opportunities tourism can bring to the local area. This shift in awareness towards the positive impact that a vibrant visitor economy can have on a destination is also likely to have been influenced by news coverage. Alongside this, the government has also targeted a lot of infrastructure and place making investment spending in areas that heavily rely on tourism activity. This sentiment highlights the importance of applying for funds and attracting investment and the positive impact sharing news and information on this can bring to resident perceptions.
- However, residents did raise the issue of the potential adverse impacts of infrastructure expansions, including new housing and hotel developments. This highlights the need to ensure that existing natural and built assets and architecture are protected and that new developments are carried out sustainably, particularly in the countryside and rural areas.



Changes in footfall and local engagement

- The survey found that residents observed less visitor footfall in the winter period in comparison to summer. Whilst expected due to seasonality, this was most likely also influenced by COVID-19 restrictions, whereby residents would have engaged less with local attractions and facilities, due to businesses being forced to close. In addition, residents were less likely to want to interact with visitors in their local area, again likely due to the pandemic in terms of increased cautiousness to interact with others.
- However, findings do illustrate that resident participation with cultural and recreational activities were less impacted. This may be due to residents still being able to engage in outdoor recreational activities or outdoor based cultural sites, exhibitions, and installations. This could also demonstrate interest and demand for these types of experiences off-season.
- In terms of location, rural areas, including those situated in the Kent Downs AONB, observed the largest increase in visitor footfall alongside cities, potentially indicating that these types of locations appeal in particular in winter.



Increasing Sense of Calm and Optimism for the Future

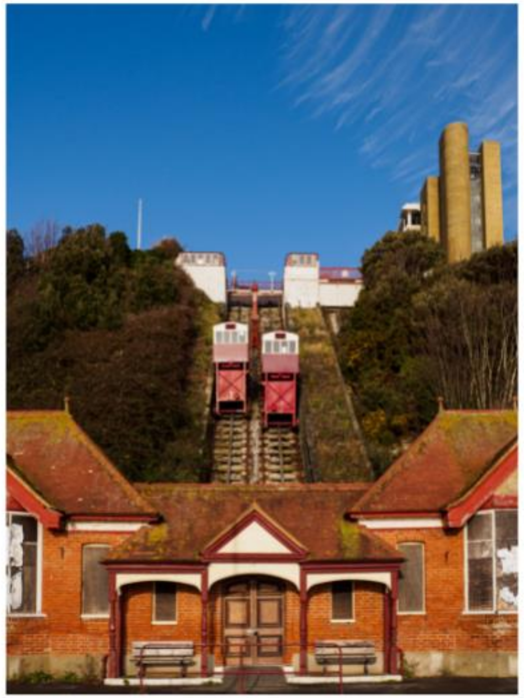
- Overall, results indicate that residents are beginning to have a more optimistic outlook for the future and an increased sense of ease during winter compared to the summer wave, which is most likely influenced by the successful roll out of the vaccination programme.
- Findings also highlight a strong sense of pride among residents living in rural locations, alongside city areas in the off-season. This may indicate the appeal of these types of destinations in the colder winter months, which may include festive activities, shopping opportunities, and countryside walks and experiences.

Impact of the Countryside on Wellbeing

Since the pandemic, residents who selected the countryside as their area's main attraction felt most strongly connected to their local area, a finding also seen in wave 1. This illustrates the positive impact living in rural areas can have on emotional connection and wellbeing, which is strengthened further in the winter months.

Quality of Local Attractions, Arts and Culture, and Food and Drink

- When looking at the top 10 positive impacts of tourism, in addition to benefits surrounding the local economy, employment opportunities, facilitating small local businesses and investment, respondents also highlighted the quality of attractions, arts and culture and events. Furthermore, this shows support to further develop events and experiences around these aspects that can benefit quality of life and support of tourism activity.
- This feedback also highlighted the value of food and drink providers and venues such as pubs, cafes, and restaurants, which ranked more highly in wave 2 than in wave 1. This increase may potentially represent a rise in engagement with the county's food and drink offering in the off-season, which also shows support for culinary experiences for this time of the year. It can also be an impact of Covid-19 restrictions, with these activities being significantly reduced.



Overall Support & Impact of Tourism

As a whole, findings show that residents still have a strong sense of support for winter tourism in their local area, and while they do certainly recognise the benefits, there are also areas for improvement. Moving forward, it will be important to track changes in sentiment around these concerns, including damage to the environment, potential overcrowding and resident wellbeing, whilst managing summer 2021 activity.

APPENDICES

05

Tourism preserves historic buildings and monuments	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement
WAVE 1	37%	40%	16%	3%	2%	1%	0%	93%
WAVE 2	28%	41%	19%	7%	3%	2%	1%	88%
Tourism increases demand for local historical and cultural attractions								
WAVE 1	41%	44%	10%	3%	1%	1%	0%	95%
WAVE 2	32%	44%	16%	5%	2%	1%		92%
Tourism increases availability of local recreation facilities/opportunities								
WAVE 1	28%	37%	21%	9%	4%	2%	0%	86%
WAVE 2	21%	40%	21%	11%	4%	2%	1%	82%
Tourism is harmful to natural places like the countryside or coastal areas								
WAVE 1	4%	7%	42%	16%	17%	11%	4%	53%
WAVE 2	6%	13%	44%	16%	14%	6%	1%	63%
Tourism limits parking spaces available to local people								
WAVE 1	17%	24%	30%	14%	7%	7%	2%	71%
WAVE 2	17%	28%	28%	15%	7%	5%	1%	73%
There are too many visitors in my local area								
WAVE 1	3%	5%	8%	26%	19%	30%	10%	16%
WAVE 2	5%	6%	11%	29%	18%	23%	8%	22%
I like to meet visitors in my local area								
WAVE 1	12%	35%	20%	27%	3%	3%	1%	67%
WAVE 2	8%	32%	22%	29%	5%	3%	1%	62%

BASE=1260

Tourism increases employment opportunities	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement
WAVE 1	43%	37%	12%	5%	2%	1%	0%	92%
WAVE 2	28%	34%	17%	10%	6%	4%	2%	79%
Tourism improves the local economy								
WAVE 1	49%	39%	8%	2%	1%	1%	0%	96%
WAVE 2	36%	39%	15%	6%	3%	2%	1%	90%
Tourism improves local investment, development								
WAVE 1	8%	24%	21%	15%	9%	5%	18%	53%
WAVE 2	24%	36%	20%	12%	5%	3%	1%	80%
Because of tourism there are more public transport services available								
WAVE 1	7%	14%	15%	31%	16%	14%	3%	36%
WAVE 2	7%	14%	15%	29%	18%	12%	5%	36%
Tourism increases prices for local services and amenities								
WAVE 1	5%	16%	24%	30%	14%	11%	1%	45%
WAVE 2	5%	19%	23%	33%	11%	7%	1%	47%
Tourism reduces my ability to access local services and facilities								
WAVE 1	3%	6%	14%	25%	21%	27%	5%	23%
WAVE 2	3%	9%	13%	27%	24%	20%	4%	25%

BASE=1260

	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement
Overall, I am very satisfied with my life								
WAVE 1	29%	48%	16%	4%	2%	1%	1%	93%
WAVE 2	26%	49%	16%	5%	3%	1%		91%
Overall, I am happy with my lifestyle								
WAVE 1	28%	48%	17%	4%	2%	1%	0%	93%
WAVE 2	24%	51%	17%	4%	4%	1%		92%
Overall, I feel very excited about my future								
WAVE 1	12%	33%	25%	20%	7%	3%	1%	70%
WAVE 2	16%	36%	23%	17%	6%	2%	1%	75%
Overall, I feel calm and relaxed								
WAVE 1	13%	36%	23%	14%	10%	3%	1%	72%
WAVE 2	14%	38%	25%	11%	9%	3%	1%	77%

BASE=1260

Having visitors around helps me feel more strongly connected to my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement
WAVE 1	8%	24%	19%	32%	9%	6%	2%	51%
WAVE 2	6%	23%	20%	33%	10%	7%	2%	49%
Summer/Winter tourism would not be a reason for me to move away from my local area								
WAVE 1	37%	40%	8%	8%	4%	3%	1%	85%
WAVE 2	40%	39%	6%	9%	2%	2%	1%	85%
I feel safe in my local area								
WAVE 1	19%	48%	20%	6%	5%	2%	1%	87%
WAVE 2	16%	49%	19%	6%	6%	2%	1%	84%
I feel financially secure living here								
WAVE 1	16%	43%	23%	10%	5%	2%	1%	82%
WAVE 2	15%	45%	20%	11%	5%	3%	1%	80%
I dislike living here								
WAVE 1	1%	1%	4%	6%	10%	36%	43%	6%
WAVE 2	1%	3%	5%	8%	10%	34%	39%	9%
My local area is tranquil, peaceful and calm								
WAVE 1	10%	26%	33%	14%	11%	4%	1%	69%
WAVE 2	10%	30%	30%	14%	12%	4%	2%	70%
I live in a beautiful area								
WAVE 1	29%	33%	20%	9%	6%	2%	1%	82%
WAVE 2	30%	35%	21%	7%	5%	2%	1%	86%
Tourism protects and enhances the natural environment								
WAVE 1	7%	20%	28%	23%	15%	5%	1%	55%
WAVE 2	5%	18%	28%	26%	16%	6%	3%	51%

BASE=1260

The number of visitors in my local area has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot	Increased	Decreased
WAVE 1	17%	14%	28%	16%	25%	31%	41%
WAVE 2	15%	12%	27%	11%	36%	27%	47%
The number of residents using local attractions and facilities has...							
WAVE 1	12%	17%	31%	17%	23%	29%	40%
WAVE 2	14%	16%	26%	10%	34%	30%	44%
The number of cultural attractions available to visit (exhibitions, events) has...							
WAVE 1	1%	10%	25%	20%	44%	11%	64%
WAVE 2	1%	6%	21%	11%	61%	7%	72%
Given the impact that COVID-19 has had on local tourism, the quality of life for residents has...							
WAVE 1	1%	11%	40%	31%	16%	12%	47%
WAVE 2	2%	12%	37%	29%	19%	14%	48%
The availability of recreation facilities and opportunities has...							
WAVE 1	1%	5%	24%	36%	35%	6%	71%
WAVE 2	1%	5%	20%	26%	48%	6%	74%
This summer/winter, the number of cultural and recreational activities I have taken part in has...							
WAVE 1	1%	6%	10%	20%	64%	7%	84%
WAVE 2	2%	6%	11%	14%	67%	8%	81%

BASE=1260

Local employment opportunities stemming from tourism are decreasing	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement
WAVE 1	25%	34%	18%	17%	4%	1%	0%	77%
WAVE 2	23%	33%	19%	21%	3%	2%	1%	75%
The local visitor economy is declining								
WAVE 1	19%	34%	19%	18%	7%	3%	1%	72%
WAVE 2	17%	33%	21%	19%	6%	3%	1%	71%
Local investment, development and infrastructure spending is declining								
WAVE 1	12%	28%	19%	31%	6%	3%	1%	59%
WAVE 2	12%	27%	17%	30%	9%	4%	2%	56%
Local transport services are improving								
WAVE 1	0%	3%	5%	45%	20%	17%	10%	8%
WAVE 2	1%	3%	5%	37%	22%	19%	13%	9%
Local infrastructure is improving (e.g. public toilets, car parks, playgrounds, footpaths, cycle paths)								
WAVE 1	1%	4%	12%	26%	27%	19%	11%	17%
WAVE 2	1%	5%	13%	24%	24%	21%	13%	19%

BASE=1260

I feel more strongly connected to my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement
WAVE 1	14%	26%	25%	26%	5%	4%	1%	65%
WAVE 2	14%	29%	22%	25%	5%	4%	2%	65%
I will not move away from my local area								
WAVE 1	33%	30%	11%	14%	5%	5%	1%	74%
WAVE 2	30%	32%	11%	14%	5%	5%	3%	73%
I feel estranged living here								
WAVE 1	1%	2%	7%	16%	14%	35%	27%	10%
WAVE 2	2%	3%	8%	17%	12%	34%	26%	13%
I feel safer and more secure living here								
WAVE 1	12%	26%	20%	31%	7%	4%	1%	58%
WAVE 2	8%	28%	19%	33%	8%	4%	1%	55%
I dislike living here								
WAVE 1	2%	2%	4%	8%	9%	33%	43%	8%
WAVE 2	2%	3%	5%	9%	9%	31%	40%	10%
My local area is more tranquil, peaceful and calm								
WAVE 1	5%	19%	25%	29%	12%	8%	3%	49%
WAVE 2	7%	22%	25%	24%	11%	7%	3%	54%

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