


Kent Perception Research

Domestic

February 2022

VISIT KENT BUSINESS
GARDEN of ENGLAND

Interreg
France (Channel Manche) England
EXPERIENCE
European Regional Development Fund

EUROPEAN UNION
European Regional Development Fund

Contents

This analysis is based on the quantitative research carried out in Britain, supported by the qualitative in-depth interviews. The first sections provide the overall results of the research and the Deep Dive sections contain further supporting evidence.



Summary



Insight & Implications

This research provides a wealth of insight into the experiences and expectations of visitors to Kent. It provides both a holistic view of how Kent is perceived and detail on the various elements within a visit experience (accommodation, transport, experiences etc.)
There are two reports as part of this research project, this one based on the domestic market and the other based on key international markets.
The following is a headline summary of the main findings contained within this report:

Awareness
- Overall awareness of Kent is similar to that of the other counties tested, but awareness of places within Kent tails off quite quickly beyond the major towns

Visit and Visitor Profile
- Kent visitors over-index on short breaks (1-3 nights) compared to visitors to Lincolnshire and Hampshire, where day trips are more likely. Visitors travelling to Kent from further away are more likely to stay overnight. Of the counties tested, Devon is most likely to attract visitors staying 4 nights or more
- Buzzseekers and Culture Buffs are the segments most likely to want to visit Kent in the future
    - Buzzseekers are young trendsetters, seeking action, excitement and new experiences. They are inspired to visit Kent, through exciting and unexpected experiences and through outdoors activities
    - Culture Buffs are middle-aged travellers who seek out a mix of iconic places and local experiences. They are drawn to Kent by the arts and culture and history and heritage
- The variation between experiences and profiles of visitors in peak and off-peak seasons is perhaps not as great as might have been expected

Visitor Experience
- Satisfaction and recommendation outperform some competitors, but lag behind Devon, which may be seen as a market leader with a strong reputation as a domestic holiday destination

Purchase Journey & Motivations to Visit
- Online search and review sites are key to the booking process and so search optimisation and good reviews for tourism businesses remain vital. Younger people also seek out bloggers and other social media recommendations
- The appeal of the beaches and countryside in Kent combines with an expectation of visiting historic sites and iconic attractions, which in turn likely builds to the perception of Kent as having a wide range of activities and an appeal across all age groups
- Active and Outdoors, History and Heritage and Food and Drink are the most inspiring images, with some overlap between the three

Insight & Implications

- **Perceptions**
  - Kent is seen as a ’beautiful’ place, relaxing with both countryside and coast. Its history is also appreciated, making it a county described by many as ‘interesting’. Regionally Kent perceptions do differ, the West being recognised for its picturesque lush countryside and the East more fun and nostalgic. The North appears less clear in its identity overall, but deeper investigation may show differences by visitor profiles
  - The countryside/natural beauty and the variety of places to visit are key drivers across all ages and yet it is Kent’s history and heritage that is the attribute most often rated very good or excellent, particularly among the over 35’s. Kent’s outdoor activity offer and the natural environment also perform very well, which is of increased significance in the post-COVID world where the outdoors is more popular than ever
- **Immersive Experiences**
  - Experiences of most interest to visitors overall are those that are different to things done at home, which are unique and authentic to Kent
  - Experiences are important for making memories. Reflecting the two segments most interested in visiting Kent, outdoor and active experiences (river tours, wildlife reserves, walking tours etc.) are popular, as are vineyards, breweries and cideries
- **Transport**
  - Car is the primary transport method, though those coming from London are more likely to use the train. Accessibility is seen as a barrier among non-visitors
- **Accommodation**
  - The importance of accommodation in driving destination decisions is strong, particularly among younger people – it’s often the primary decision influencer and is a core part of the short break/holiday for over half of travellers. Perhaps again influenced by COVID, there is an increased interest in higher-end hotels and in self-catering accommodation (rented cottage, camping etc.)
- **COVID Impact**
  - There is still a wariness currently of booking too far in advance for fear of changes to COVID rules and/or access to refunds. Hygiene remains a top concern for both attractions and accommodation. However, domestic visitor volume uplift post-COVID may not be sustained as two-thirds of those whose travel habits have changed during COVID expect to return to ‘normal’ in the next year or two
- **Sustainability**
  - The increasing focus on sustainability provides further opportunities for Kent, as the aspects linked to sustainability that people think are most important (clean, unpolluted beaches, parks/green spaces and actions to protect the natural landscape) link well to Kent’s perceived strengths

Background

Research Objectives

This analysis is based on the quantitative research carried out in Britain, supported by qualitative in-depth interviews.

Background

Visit Kent is one of 14 partners from France and the UK working together on EXPERIENCE, a €23m project co-funded by the Interreg France (Channel) England Programme focused on boosting off-peak visitor volume

Research Requirements

- Research awareness, image and perception of Kent and nested destinations as day trips and overnight holidays choice
- Refine audiences, visitor profiles and behaviour
- Capture destination satisfaction
- Identify shifts in key findings from the previous wave
- Provide consumer insights which will inform the development of future campaigns, products and a year-round visitor offer
- Inform the development of new experiential tourism products and potential audiences
- Compare key perceptions of Kent with competitor destinations

Research Plan

Comprehensive programme of research:
Online quantitative survey

Country	Interviews	Timing
Britain	2000	August
US	750	December 2021
France	750	
Spain	750	
Germany	750	

10 qualitative in-depth interviews in England

Fieldwork

- Online quantitative fieldwork Wednesday 25th August – Friday 9th September 2021
- Focus on people who have visited Kent before and/or will visit Kent in future for leisure or to visit friends and relatives
- Geographic skew towards those living within 3hr drive time of Kent
- Quotas set on gender, age and region (excluding Northern Ireland)
- 2001 valid, completed interviews
- 10 on-line depth interviews (Zoom) December 2021




Respondent Profile

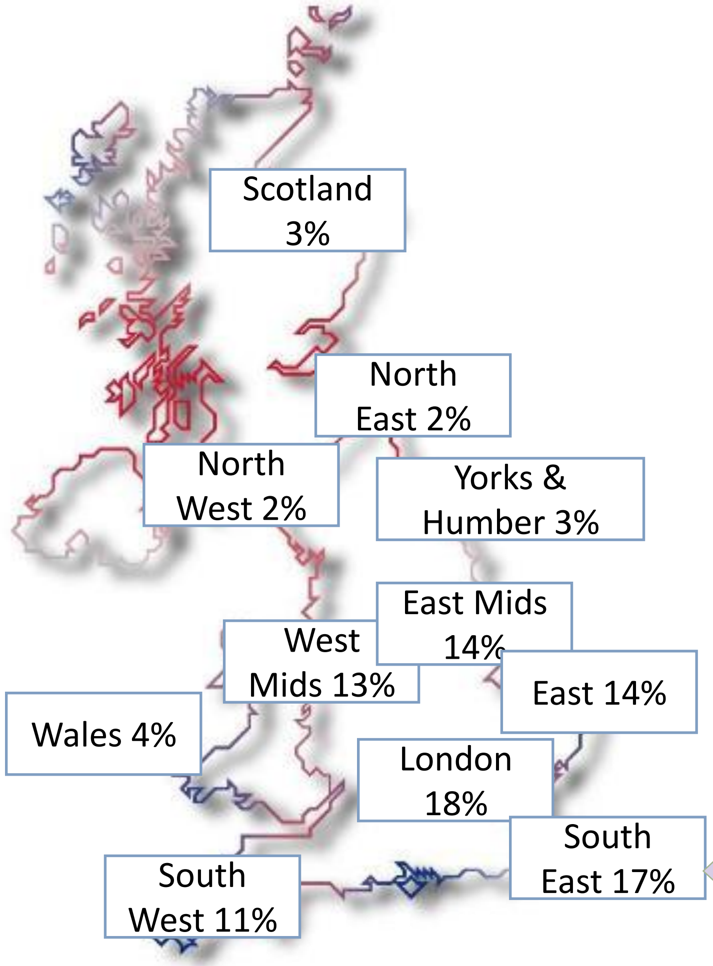


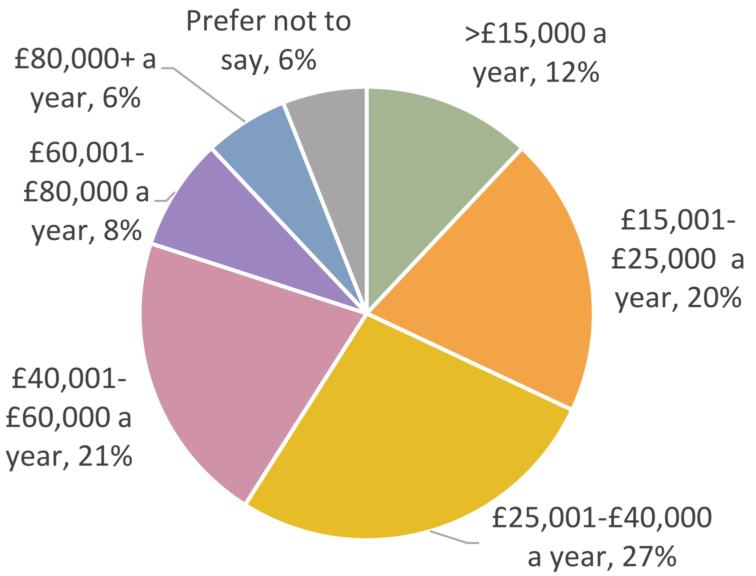
Respondent Profile

The sample is in line with population profile for gender and age, along with a good spread of incomes. The geography is skewed towards those within a c.2-3 hour journey time to Kent. As part of the screeneing process, Kent residents could not complete the survey.

Gender	%
Male	51%
Female	49%

Gender	%
18-24	13%
25-34	16%
35-44	19%
45-54	17%
55-64	18%
65-74	13%
75 or over	4%





11% Berkshire
12% Buckinghamshire
6% Essex
13% East Sussex
11% West Sussex
26% Hampshire
2% Isle of Wight
6% Oxfordshire
12% Surrey

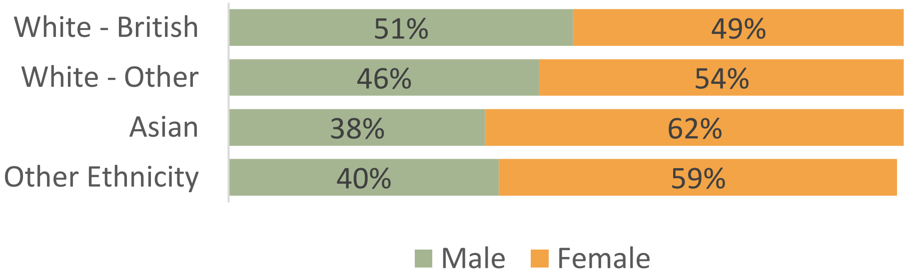
Q1: Are you: Base: All respondents (2,001)
Q2: Which of the following age categories do you fall into? Base: All respondents (2,001)
Q3 Which region do you live in? Base: All respondents (2,001)
Q60 What is your annual household income? All respondents (2,001)

Respondent Profile

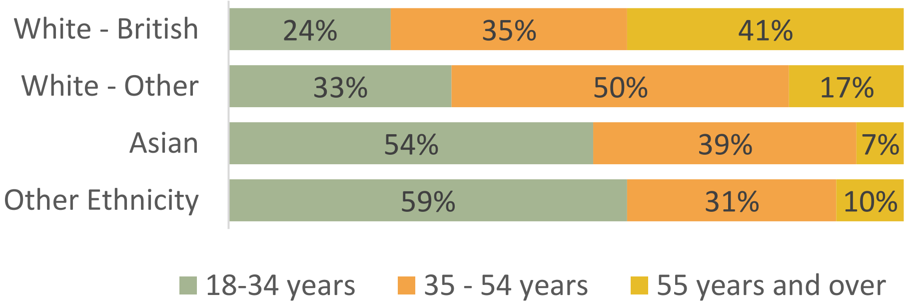
A strong representation of non-white British in the sample allows us to explore diversity within the results.

Ethnicity	Sample Size	%
White - British	1582	79%
White - Other	109	5%
Mixed or multiple ethnic groups	57	3%
Asian or Asian British	144	7%
Black, African, Caribbean or Black British	72	4%
Other ethnic group	11	1%
Prefer not to say	26	1%

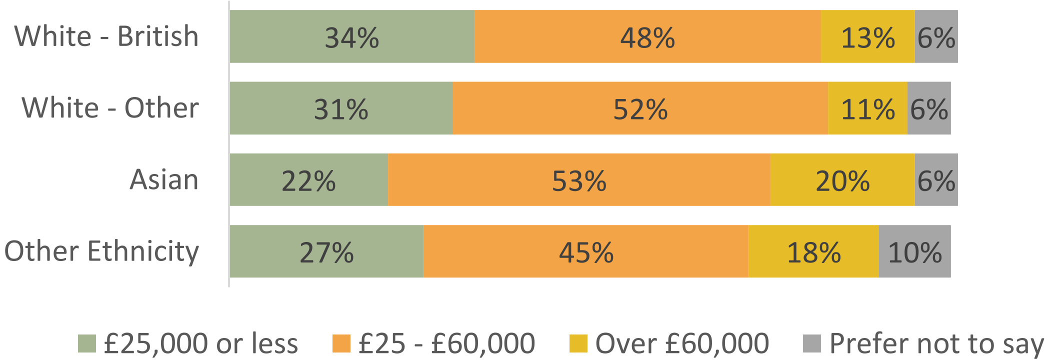
White British respondents are an older age profile than other ethnicity groups. There is a greater proportion of women among the Asian and other non-white ethnicity survey participants.

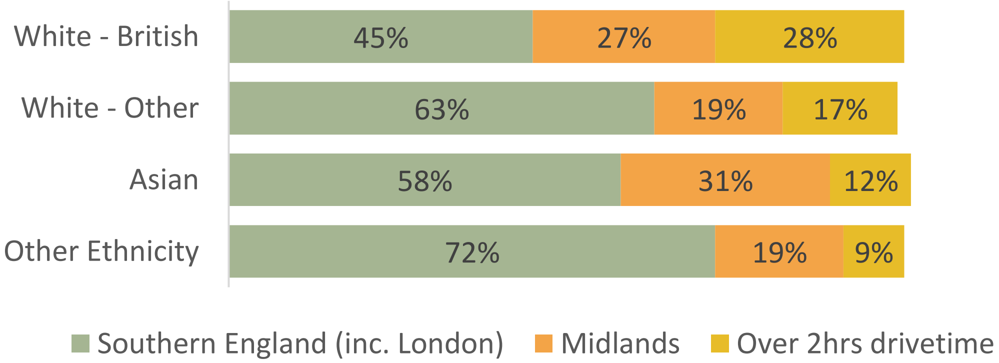


A greater proportion of ethnic groups other than white British live in Southern England. 31% of those who are Asian live in the Midlands.



Asian participants are the most affluent with 20% having an income of over £60,000.





Q60 What is your annual household income? Base: All respondents (2,001)

Q61 What is your ethnic group? Base: All respondents (2,001)

Note: Ethnicity Groups combined for analysis due to small sample bases

Kent Visits and Intent to Visit

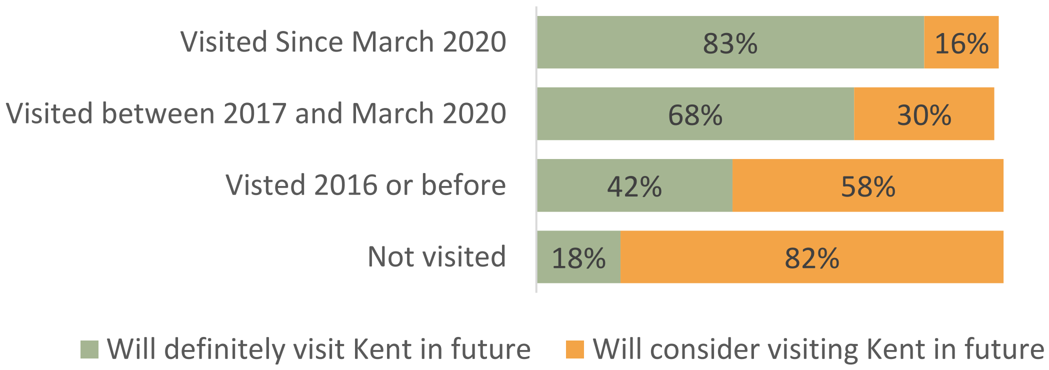
The sample included a good mix of recent and not-so recent visitors as well as some who had never visited Kent before.

Past

Never Visited	Visited before 2016	Visited between 2017 & March 2020	Visited since March 2020
27%	**25%**	**29%**	**19%**

Future

Definitely NOT visit in future	I will consider visiting Kent in future	I will definitely visit Kent in future
1%	**48%**	**51%**

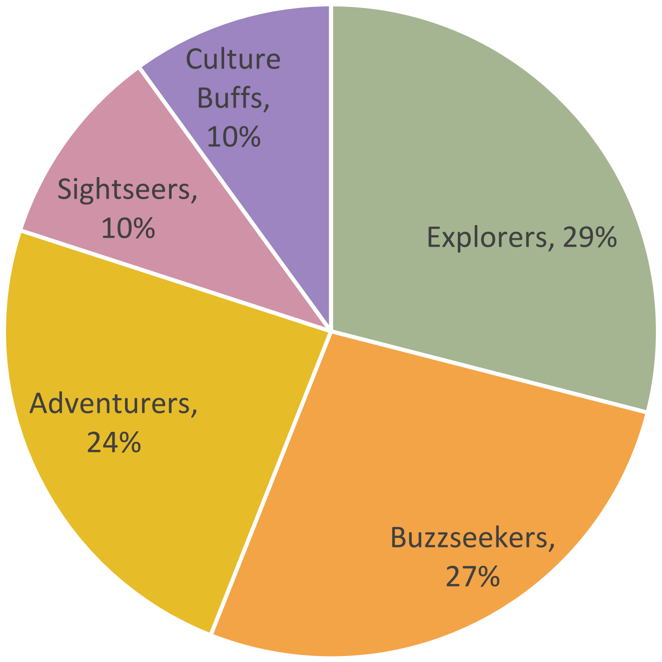


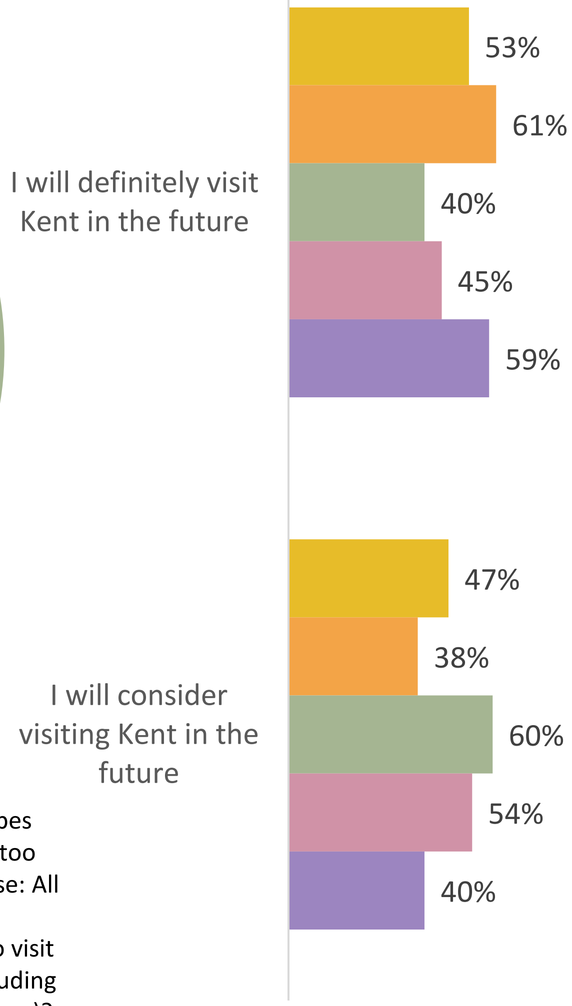
Intent to visit Kent in the future is highest among those who have visited during the COVID pandemic.
Those who have not visited Kent before and those who visited 5 or more years ago are the least sure about visiting in the future.
This suggests a communication focus is needed around first time visitors to engage and inspire them.

Q5 Which of these statements best describes your experience of visiting Kent in the past, whether for a short leisure trip or holiday including visiting friends or relatives (day trip or staying for one night or more)? Base: All respondents (2,001). Q6 Which of these statements best describes your likelihood to visit Kent in the future, whether for a short leisure trip or holiday including visiting friends or relatives (day trip or staying for one night or more)? Base: All respondents (2,001)

Segmentation

VisitBritain segmentation, developed originally for inbound visitors, has been included within the survey. Buzzseekers and Culture Buffs are most likely to visit Kent in the future.





Q59 Select which of the two statements in each pair BEST describes you. There will be a few statements, so we ask you not to think too long about each – just read and answer as quickly as you can. Base: All respondents (2,001)
Q6 – Which of these statements best describes your likelihood to visit Kent in the future, whether for a short leisure trip or holiday including visiting friends or relatives (day trip or staying for one night or more)? Base: All respondents (2,001)

VisitBritain Segmentation

Segment	Global Size Estimate	Profile Headlines
Buzzseekers	38%	Younger, 64% aged 18 – 34yrs Free spirited and spontaneous They like to take holidays full of action and excitement
Explorers	23%	Older, 58% aged 55 years+ Content to enjoy holidays at a more relaxed pace Nature lovers enjoy the outdoors as well as must-see sites Enjoy embracing local culture
Adventurers	16%	Older, 67% aged 45 years+ Enjoy travelling off the beaten track Like spending time outdoors in nature Seek out new experiences
Sightseers	12%	Older, 57% are aged 55 years+ Like to stay within their comfort zone Prefer cities to countryside Seek sensible, well-planned trips
Culture Buffs	12%	Average age 37 years Image and brand conscious Travelling is often a status symbol Like well-known and safe destinations

Base: Visit Britain Segmentation Groups: Adventurers (486), Buzzseekers (532), Explorers (532), Sightseers (191), Culture Buffs (203)

Source: Inbound Tourism Toolkit | VisitBritain/VisitEngland

Qualitative Participants

The 10 qualitative in-depth interviews were designed to explore topics of interest identified in the quantitative analysis.
The sample was designed to focus on audiences of most interest.

Region
3 x London
3 x Midlands
4 x South

Age
5 x 25 – 34 years
4 x 35 – 54 years
1 x 55 years and over

Segment
3 x Buzzseekers
2 x Adventurers
2 x Culture Buffs
3 x Explorers

Visited Kent before
8 x Yes
2 x No

When visited Kent
6 x Since March 2020
5 x Between 2018 & March 2020
2 x Before 2018
(multiple visits)

Seasonality (past visits)
1 x January – March
2 x April – June
7 x July – September
3 x October - December

Duration (last visit)
5 x 1 – 3 nights
4 x 4 – 7 nights
1 x More than 7 nights

Accommodation (past visits)
2 x 4/5 Star hotel
4 x 3 Star hotel
1 x Glamping
3 x Camping/Holiday Park
1 x Airbnb
2 x Rented cottage

Visit Group (past visits)
3 x Partner/Other adults
4 x Children under 10 years
3 x Children 10 – 16 years

Intent to visit Kent
2 x Already booked
3 x Seriously researched
4 x Considering Kent
1 x Not intending to return to Kent

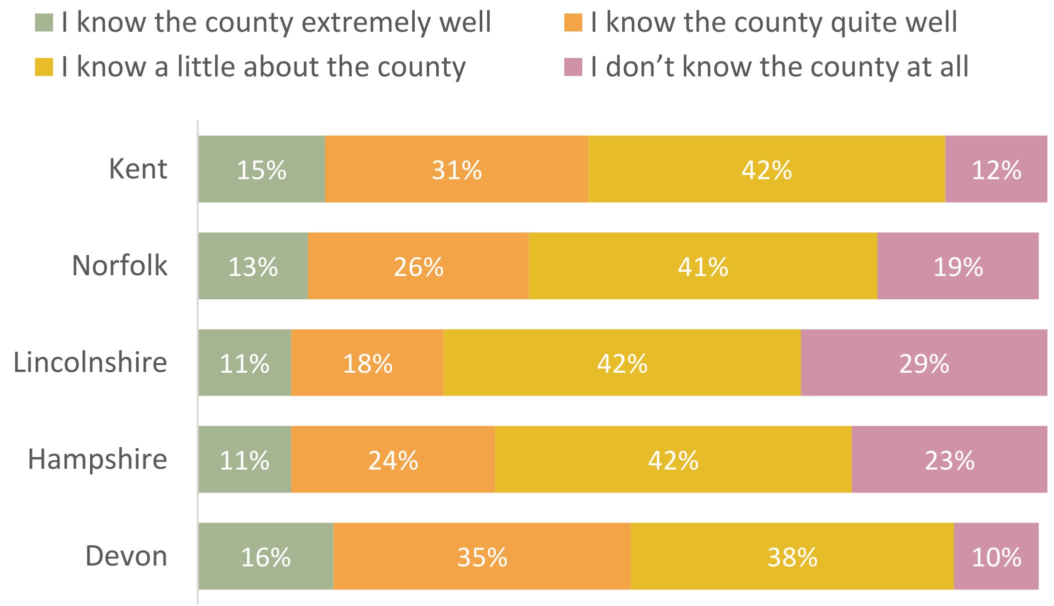


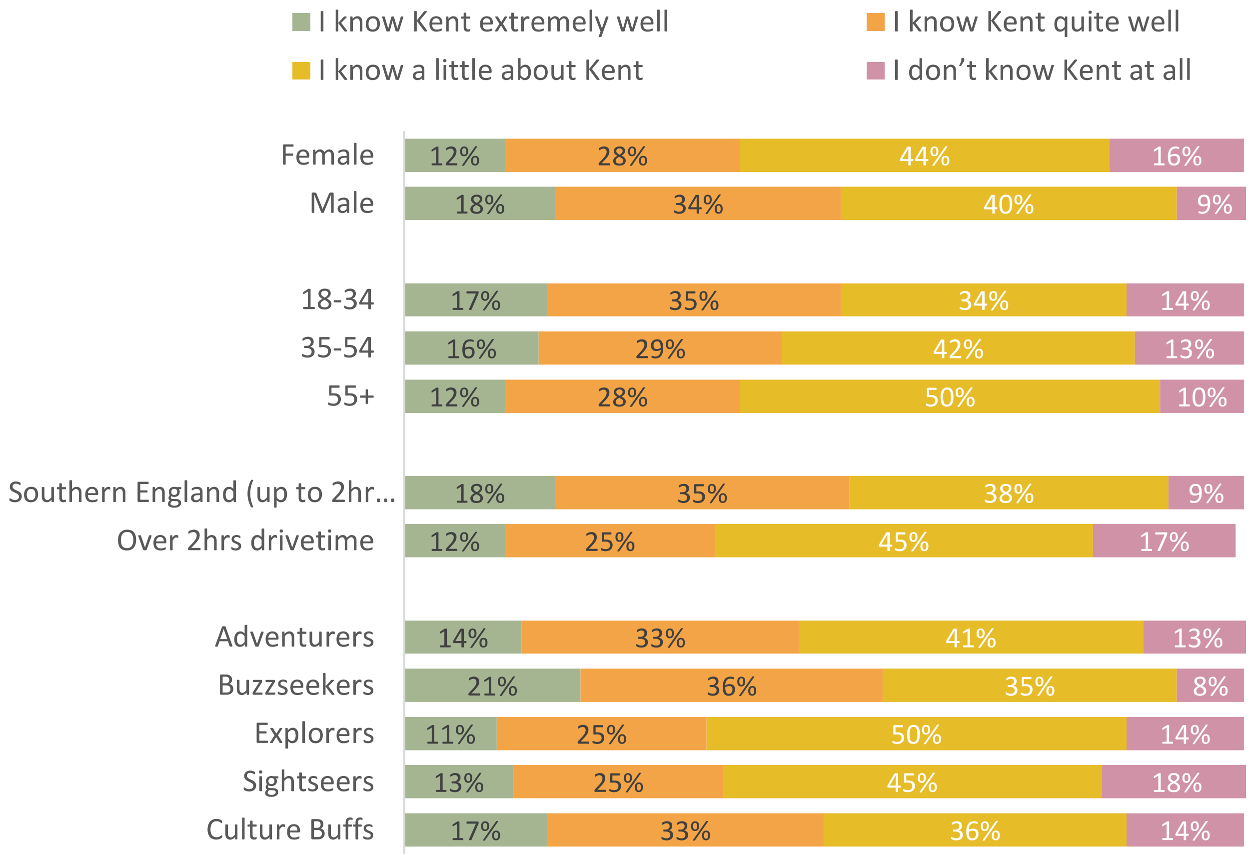
Awareness of Kent



Familiarity

Kent is quite well known as a leisure destination, on par with Devon and ahead of the other three competitor counties tested. Females aged over 55 and living more than two hours drivetime are the least familiar with Kent as a destination for leisure trips or holidays.

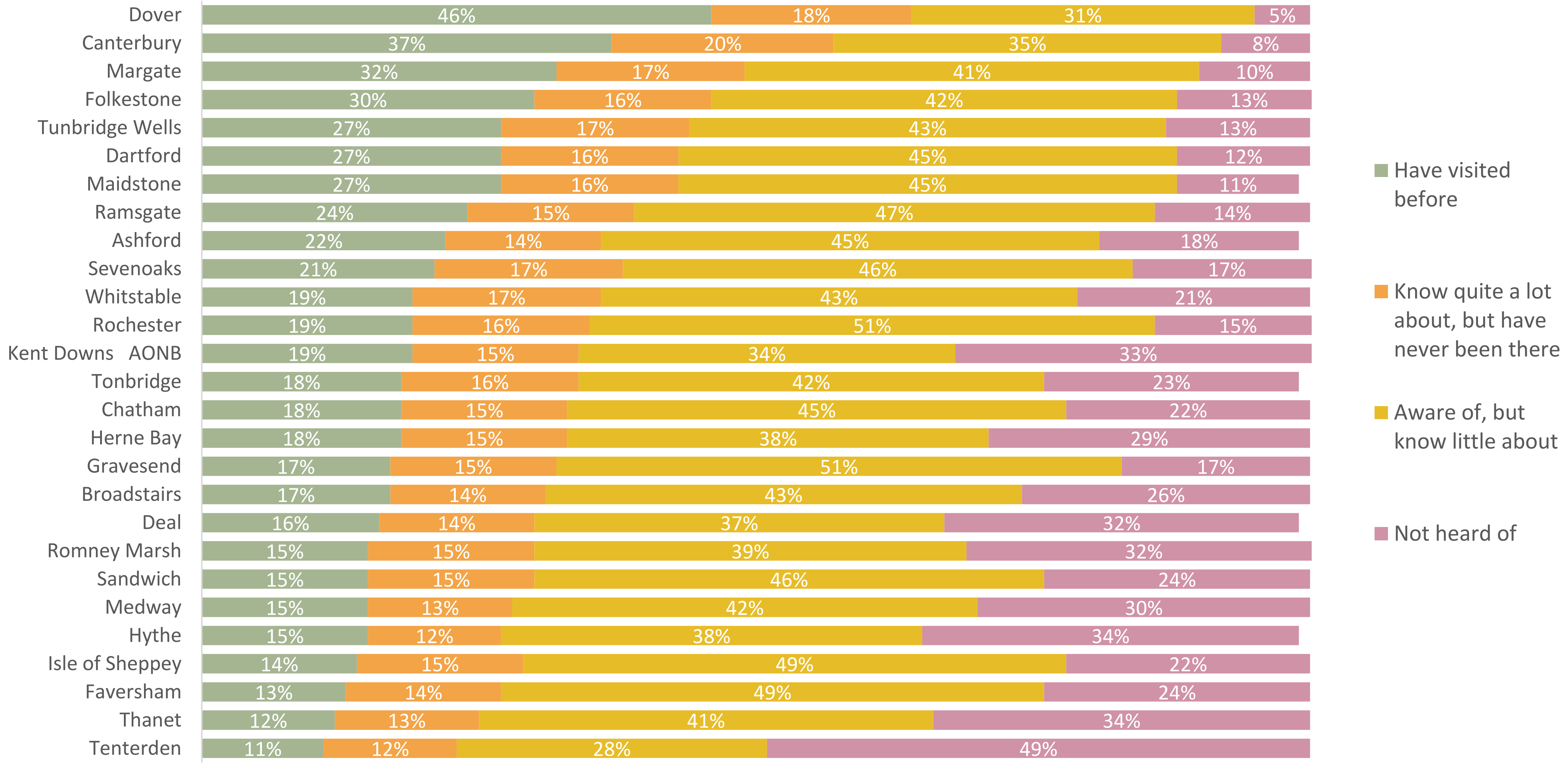




Q16b How familiar are you with each of these destinations for leisure trips or holidays? Base: All respondents (2,001)

Familiarity

Awareness of places within Kent is quite limited. Dover and Canterbury are the most visited/well known.
Many destinations have not been heard of by more than one in four respondents including the Kent Downs AONB.



Q34 Which of the following places in Kent are you aware of and/or have visited? Base: All respondents (2,001)

Familiarity

Awareness of Dartford, Gravesend and Sevenoaks has increased relatively from the previous research, while Hythe, Tenterden and Broadstairs are relatively less well-known now compared to other places in Kent.

	Rank 2021	Rank 2017	Movement
Dover	1	2	1
Canterbury	2	1	-1
Margate	3	4	1
Folkestone	4	3	-1
Tunbridge Wells	5	6	1
Dartford	6	15	9
Maidstone	7	8	1
Ramsgate	8	5	-3
Ashford	9	11	2
Sevenoaks	10	16	6
Whitstable	11	10	-1
Rochester	12	9	-3
Kent Downs Area of Outstanding Natural Beauty (AONB)	13	N/A	N/A
Tonbridge	14	7	-7

	Rank 2021	Rank 2017	Movement
Chatham	15	14	-1
Herne Bay	16	17	1
Gravesend	17	25	8
Broadstairs	18	13	-5
Deal	19	19	0
Romney Marsh	20	20	0
Sandwich	21	18	-3
Medway	22	23	1
Hythe	23	12	-11
Isle of Sheppey	24	N/A	N/A
Faversham	25	21	-4
Thanet	26	24	-2
Tenterden	27	22	-5

Q34 Which of the following places in Kent are you aware of and/or have visited?
Base: All respondents (2,001)

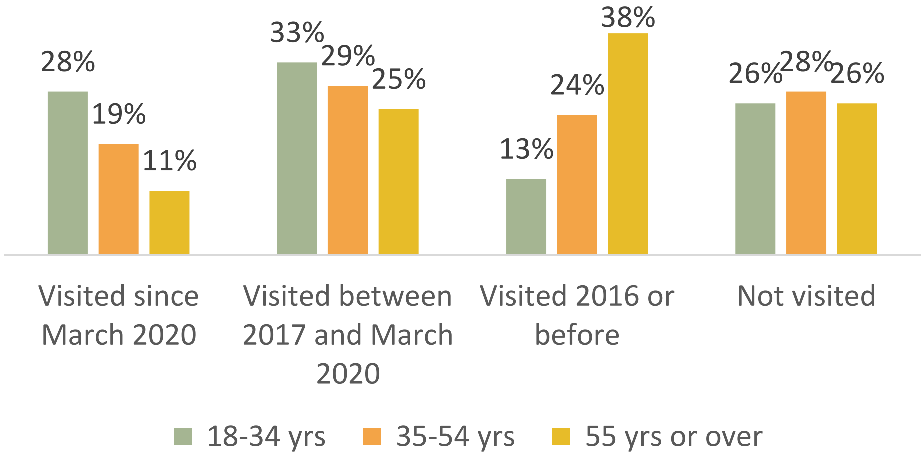


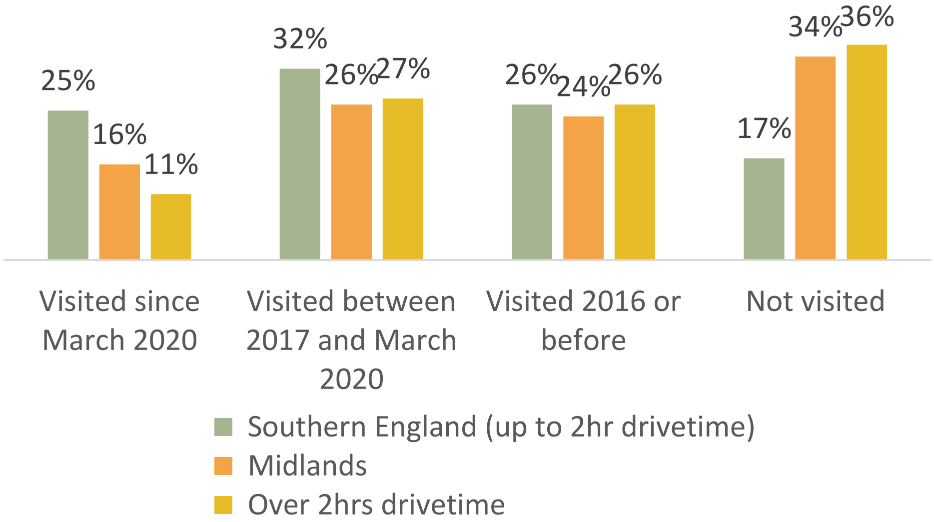

Visit and Visitor Profile



Visits to Kent

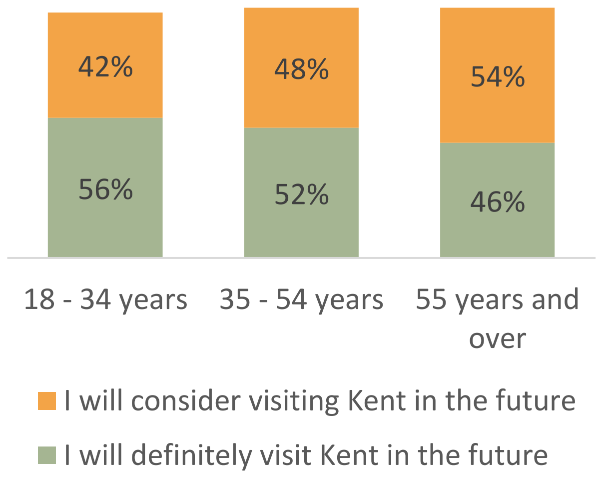
Recent visitor profile skews towards younger, relatively local people, though the intent to visit in future is more evenly distributed.

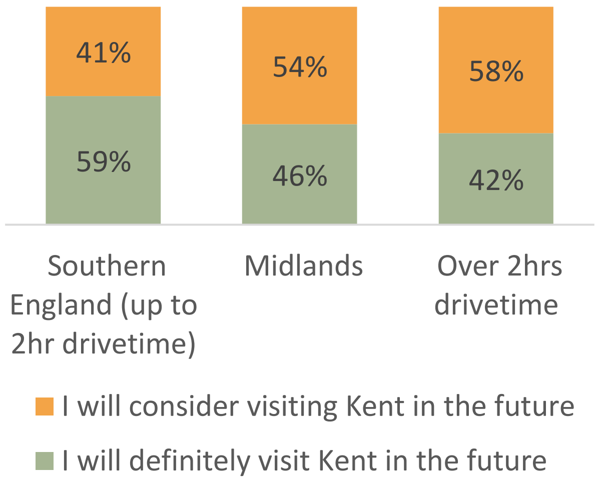




Visitors during the COVID pandemic and in the years before were younger than those who visited longer ago. The considerable skew to younger people during COVID is likely to reflect travel restrictions and the greater level of concern through the pandemic among older people. The age profile of those who have not visited Kent is evenly distributed. Future intent to visit Kent is fairly evenly distributed across all age groups

Recent visitors are more likely to have been from the South of England, driven primarily by visitors from London. This may well reflect the COVID travel restrictions in place. Those who have not visited Kent are typically from the Midlands and beyond. Future intent is higher among those who are closer to Kent, particularly among those living in London.

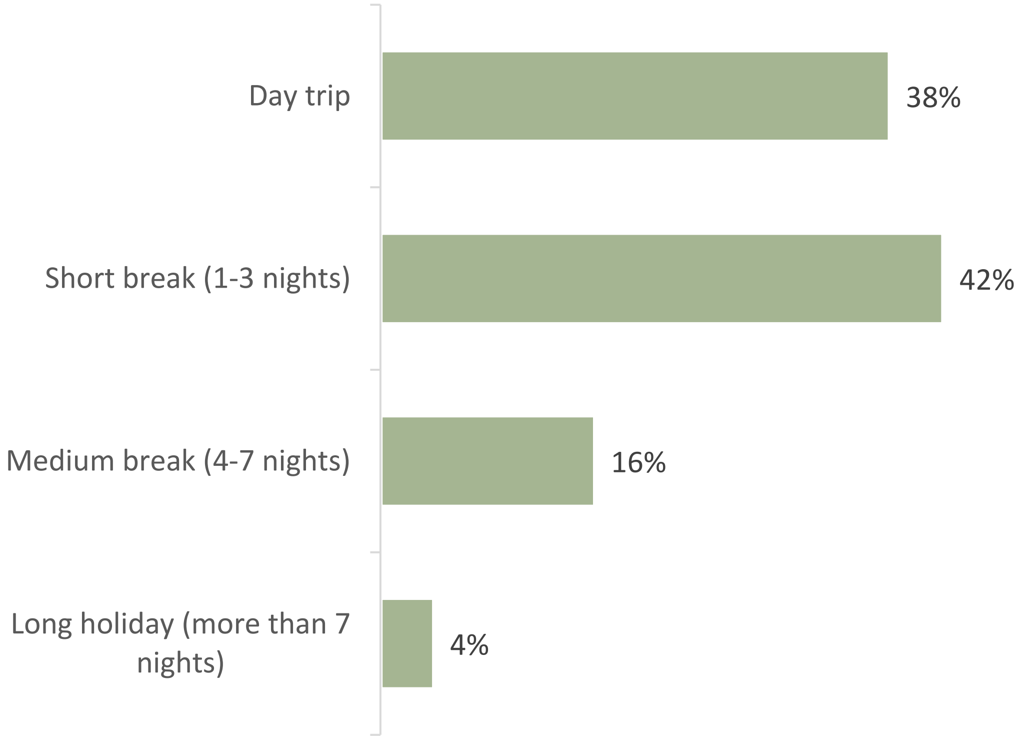


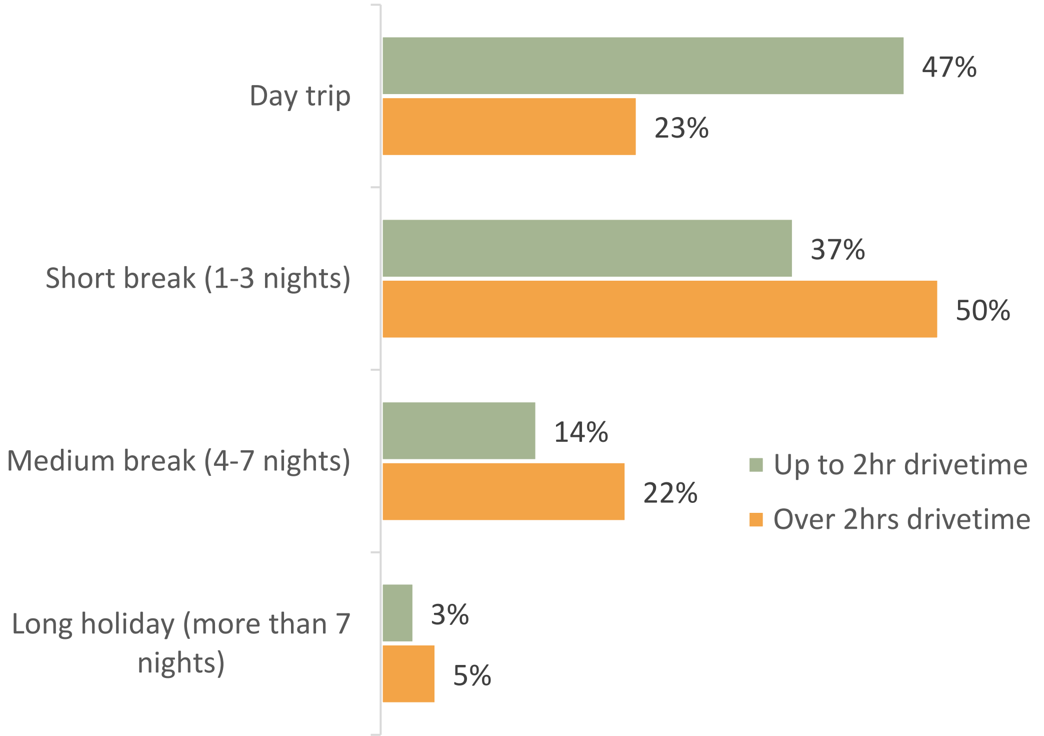


Q5 Which of these statements best describes your experience of visiting Kent in the past, whether for a short leisure trip or holiday including visiting friends or relatives (day trip or staying for one night or more)? Q6 – Which of these statements best describes your likelihood to visit Kent in the future, whether for a short leisure trip or holiday including visiting friends or relatives (day trip or staying for one night or more)? Base: All respondents (2,001)

Last Leisure Visit - Trip Duration

The majority of last leisure visits to Kent were either day trips or short breaks of a couple of nights. Almost half (47%) of those living within a two hour drivetime of Kent came just for the day.





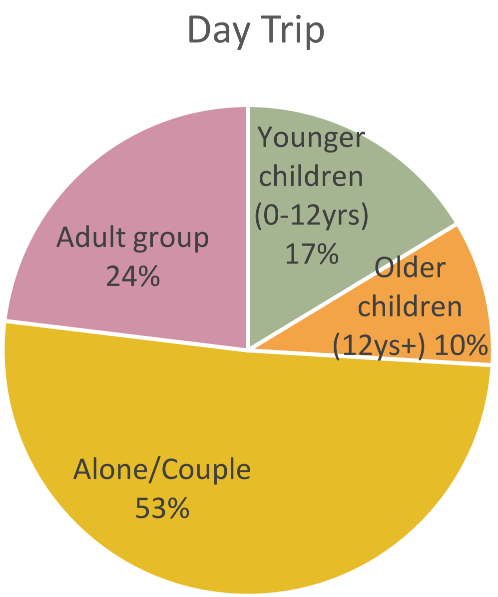
Q14 How would you describe your last/latest leisure visit to Kent? Base: All who have visited Kent (1,470), Up to 2hr drivetime (802), over 2hrs drivetime (320)

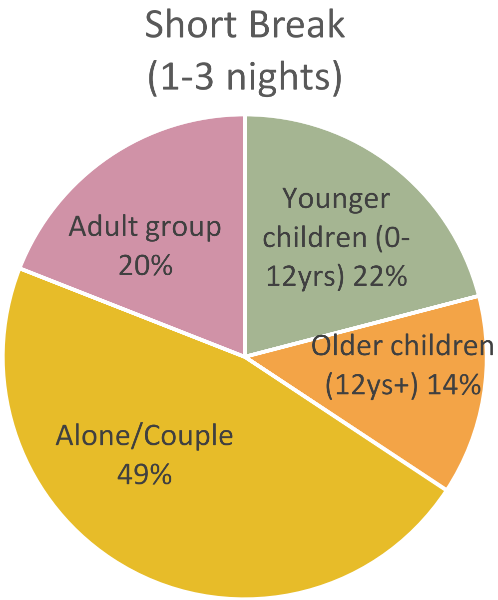
Visitor Group and Trip Duration

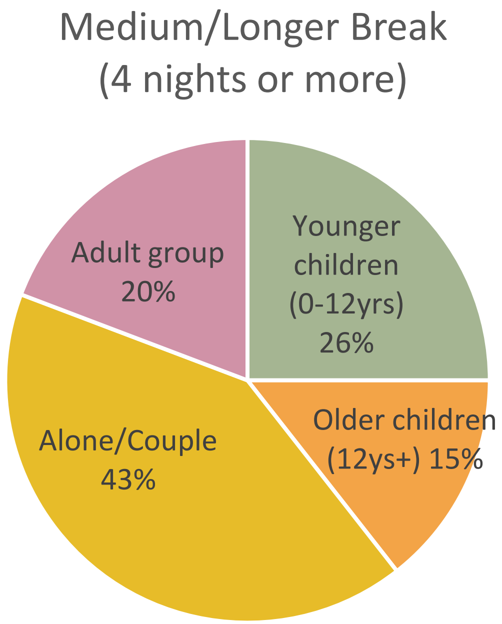
Visitor group composition changes a little between short, medium and long stays.

Last visit to Kent*
The longer the last stay in Kent, the more likely the visitor group was to include children.

** Note: percentages sum to slightly above 100% where people have children both up to and over 12 years in their group*







Future visit to Kent
(Based on those quite or very likely to stay for this length of time)
A similar picture is seen for likely future trips to Kent, with young children in particular, more likely to be in the visitor group on longer breaks.

Future Visits to Kent	Day Trip	Short Break (1-4 nights)	Medium Break (4 – 7 nights)	Long Break (8 nights or more)
Younger children (0-12 years)	26%	25%	28%	32%
Older children (12 years+)	15%	14%	15%	18%
Alone/couple	44%	46%	43%	41%
Adult group	21%	19%	20%	16%

Q14 How would you describe your last/latest leisure visit to Kent? Base: All who have visited Kent (1,470), Day Trip (558), Short Break (619) Medium / Longer Break (292)

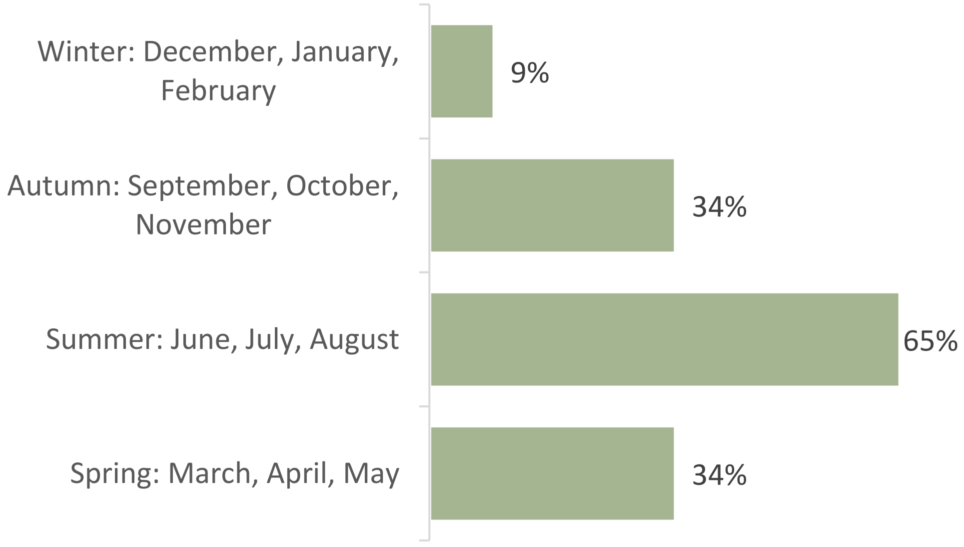
Seasonality

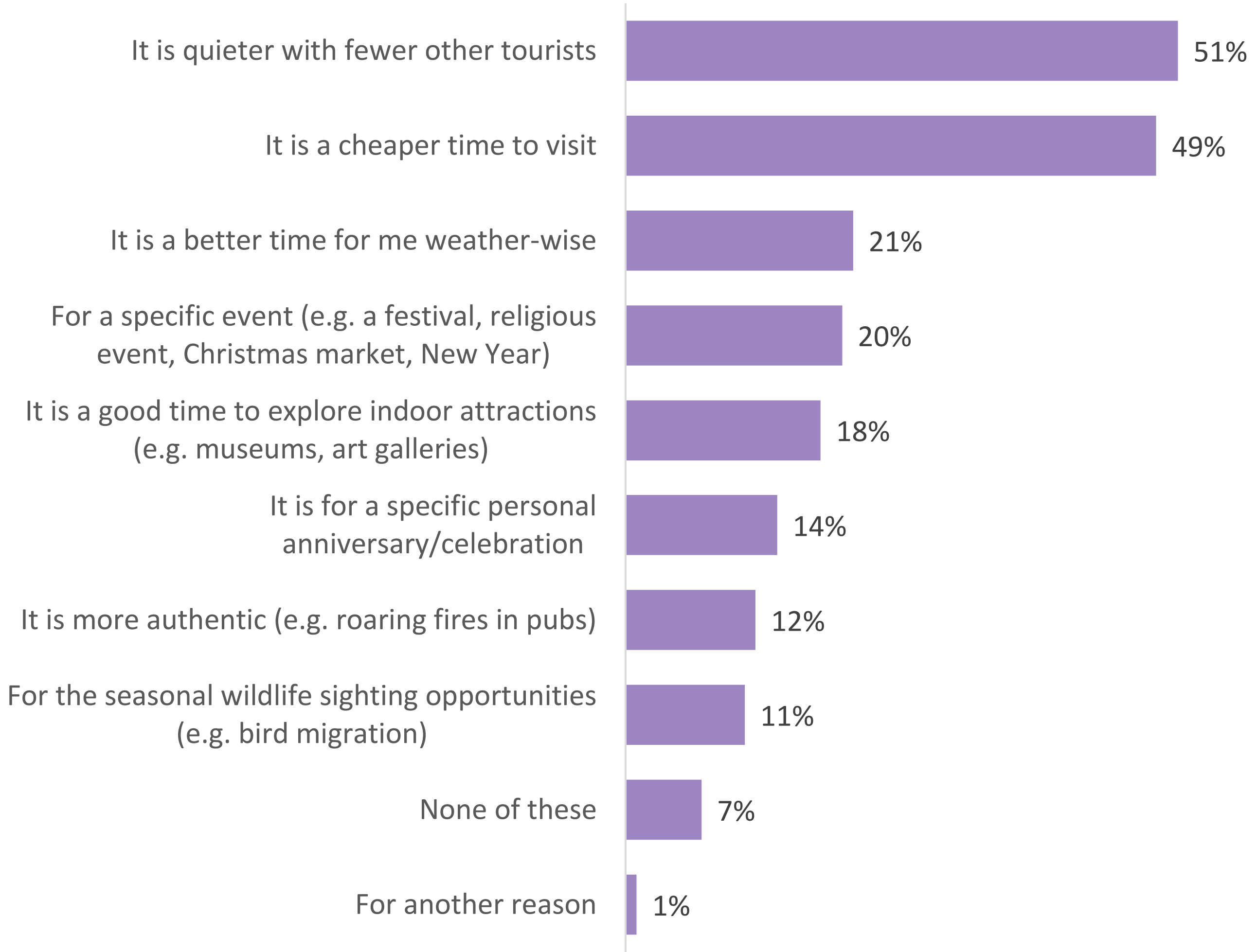
Seasonality of Future Visits

Summer dominates, but a third would visit in Spring or Autumn. Price and quietness drive reasons for visit in term time.

There is a slight skew towards summer visits among those coming from London.

Those more likely to come in shoulder seasons are those aged 55 and over. Adventurers, Sightseers and Explorers are also more likely to consider off-peak visits to Kent.





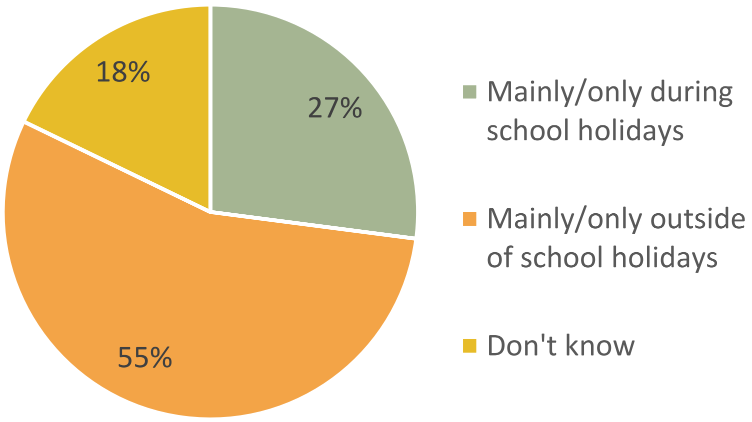
Q48 At what time(s) of year would you be most likely to visit Kent in the future? Base: Will definitely visit / consider visiting Kent in the future (1,989)
Q50 Which, if any, of these reasons would encourage you to visit Kent outside of the summer season? Base: Will definitely visit / consider visiting Kent in the future (1,989)

Summer vs Off-Peak Visitors

Those ‘locked’ into taking trips in the school holidays have a perception of higher prices.

Those with school-age children have to take trips during the school holidays. It is an unavoidable situation, that can lead to frustration around prices.

Several of the participants in the qualitative research talked about prices increasing in the school holidays.



Q49 Would you plan to visit Kent during the school holidays or not?

> the school holidays, they just whack their prices up
>
> Family with older children

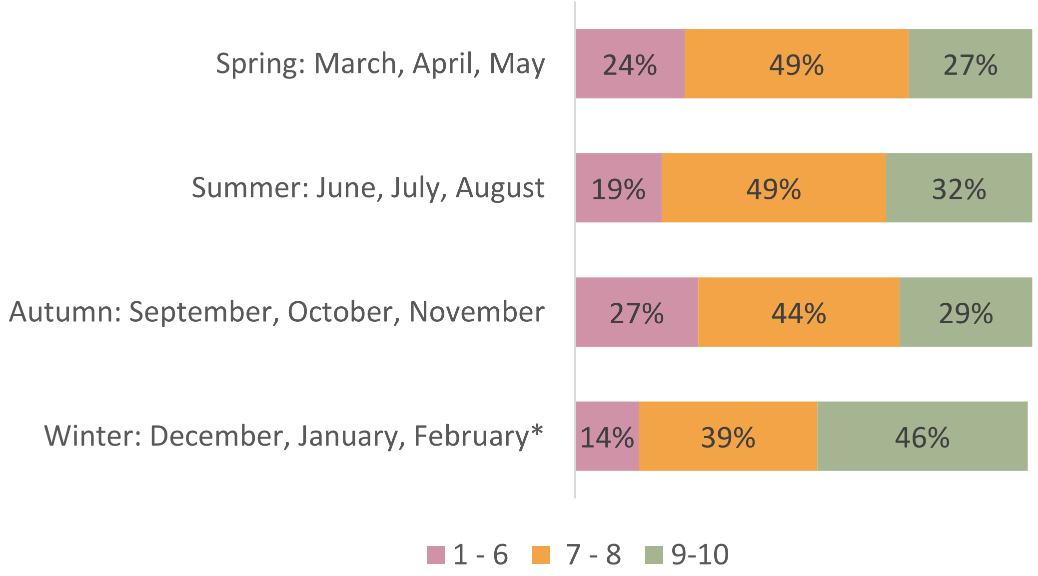
> Whitstable is definitely somewhere that I would like to do a longer break to but it’s just so expensive, the prices are during the holiday time, school holiday time, are pretty astronomical
>
> Family with school-age children

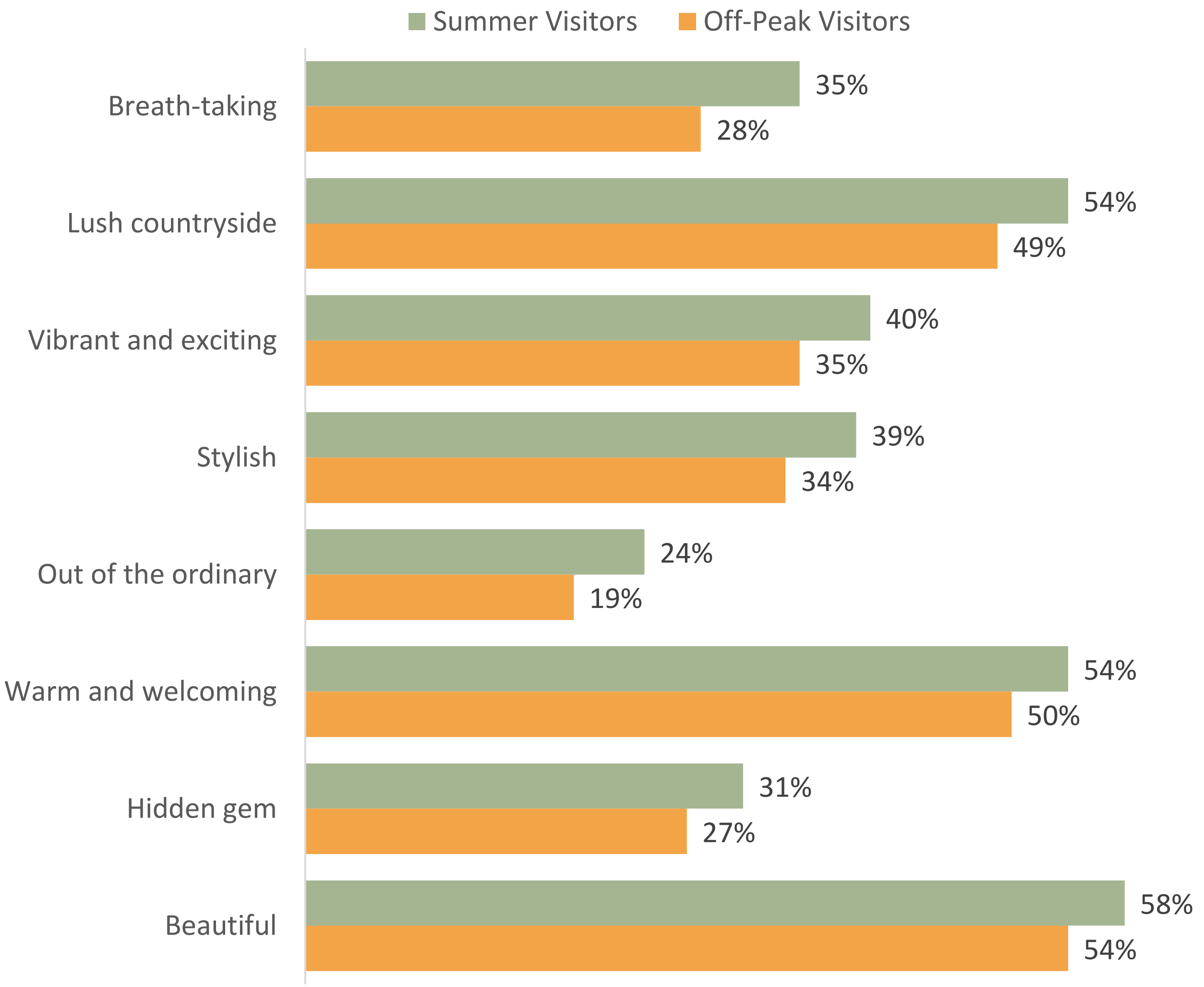
> it’s just so expensive to go on holiday in the holidays so there was no need for us to, I’m not a teacher and my husband is not in that sort of role either so there’s no need for us to go on holiday in those sort of times really so, it’s more weather-wise. We used to go on holiday in sort of May time and then we’d go away again in September time
>
> Family with pre-school children

Summer vs Off-Peak visitors

Winter and Summer visitors are more positive than those who visited Kent in the shoulder seasons. Summer visitors are a little more positive in the way they describe Kent. However, there is considerable overlap between peak and off-peak visitors.

Overall Experience
(1: Not good at all – 10: Excellent)





Note: chart shows those attributes where the difference between the views of summer vs off-peak visitors are the largest

Summer vs Off-Peak Visitors

If attractions and hospitality businesses close off-peak,the impact on visitor experience and perceptions of Kent can be negative.

Feedback from the qualitative research contrasts with the quantitative results, with concerns from some visitors around the lack of places open in the off-peak seasons. This may have been amplified by the COVID situation, but has led to some negativity among off-peak visitors and illustrates the risk closed businesses pose to perceptions of Kent, even when those closures were perhaps atypical.

There was nothing open, like there was nowhere to get chips, nothing kind of seaside-y. Now, it was mid-week and it was off-season, so maybe that's why, but I'd never experienced that before when we'd done it that way. So, we ended up having to hop on a bus to the end of the line, to get the train back, because there was nothing to do, we were stuck there. Until the train came back

Family with young children (During COVID pandemic)

A lot of places we went to just felt derelict. There just wasn't really anything going on

Family with young children (During COVID pandemic)

Even the shop on the beach was shut. In September! And they were like, 'Oh yeah, but we open on the Saturday and Sunday, because that's when the local kids are back, not in school.'

Family with older children (During COVID pandemic)




Visitor Experience
Satisfaction, Recommendation and Opinions of Kent

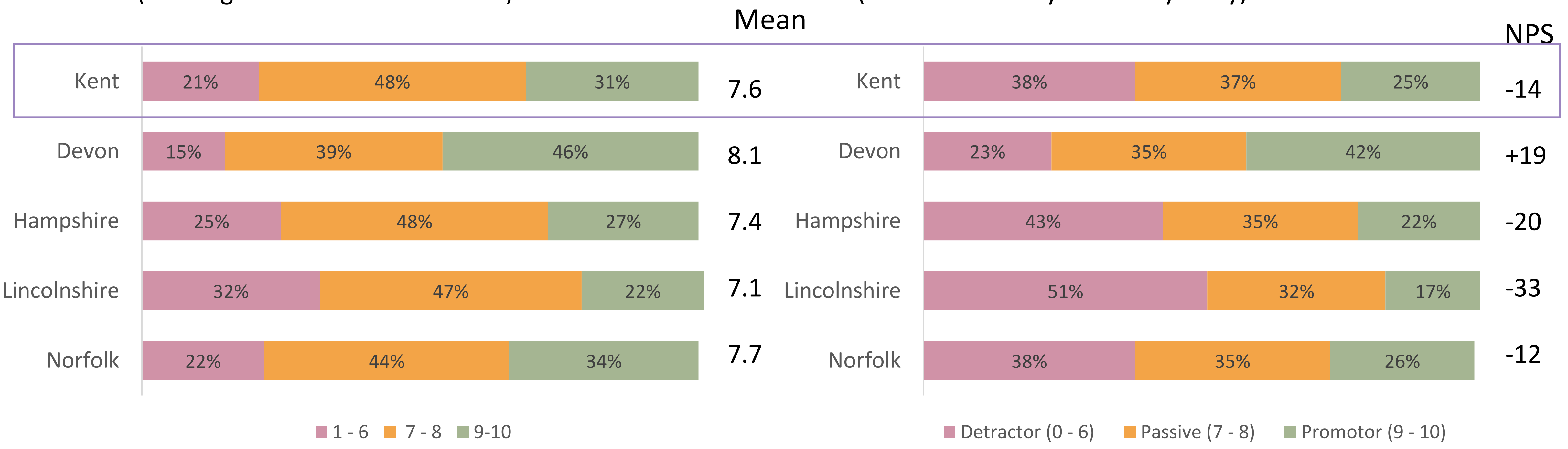


Overall Experience & Recommendation

A third of people rate their experience of Kent very positively and a quarter would definitely recommend Kent. These scores are better than Lincolnshire and Hampshire and similar to Norfolk. Scores for Devon are considerably higher.

Overall Experience
(1: Not good at all – 10: Excellent)

Recommendation Net Promotor Score
(0: Not at all likely – 10: Very likely)

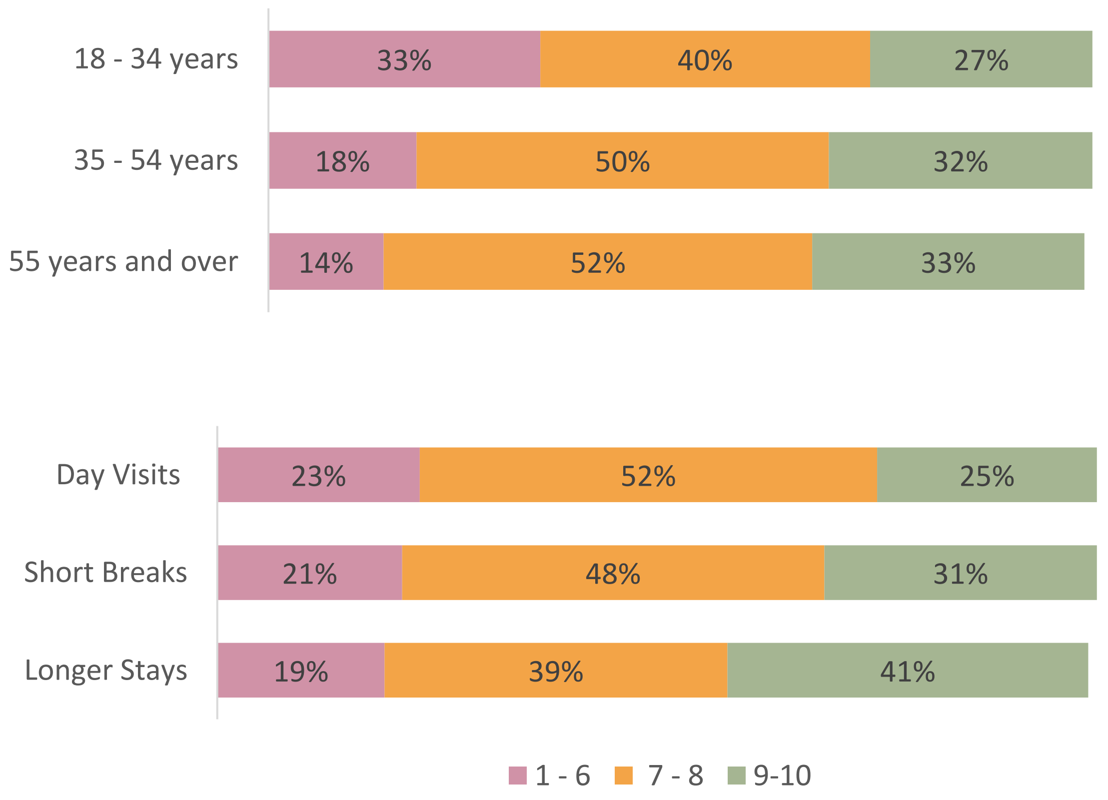


Q19 Thinking back to your most recent trip to each of these places, how would you rate your experience overall? Base: all who have visited county for a leisure trip or holiday; Kent (1,470), Devon (1,459), Hampshire (1,040), Lincolnshire (967), Norfolk (1,197).
Q20 And how likely is it that you would recommend a holiday or short trip to each of these places to a friend or colleague? Base: All respondents (2001) Notes: NPS is calculated by % promoters minus % detractors

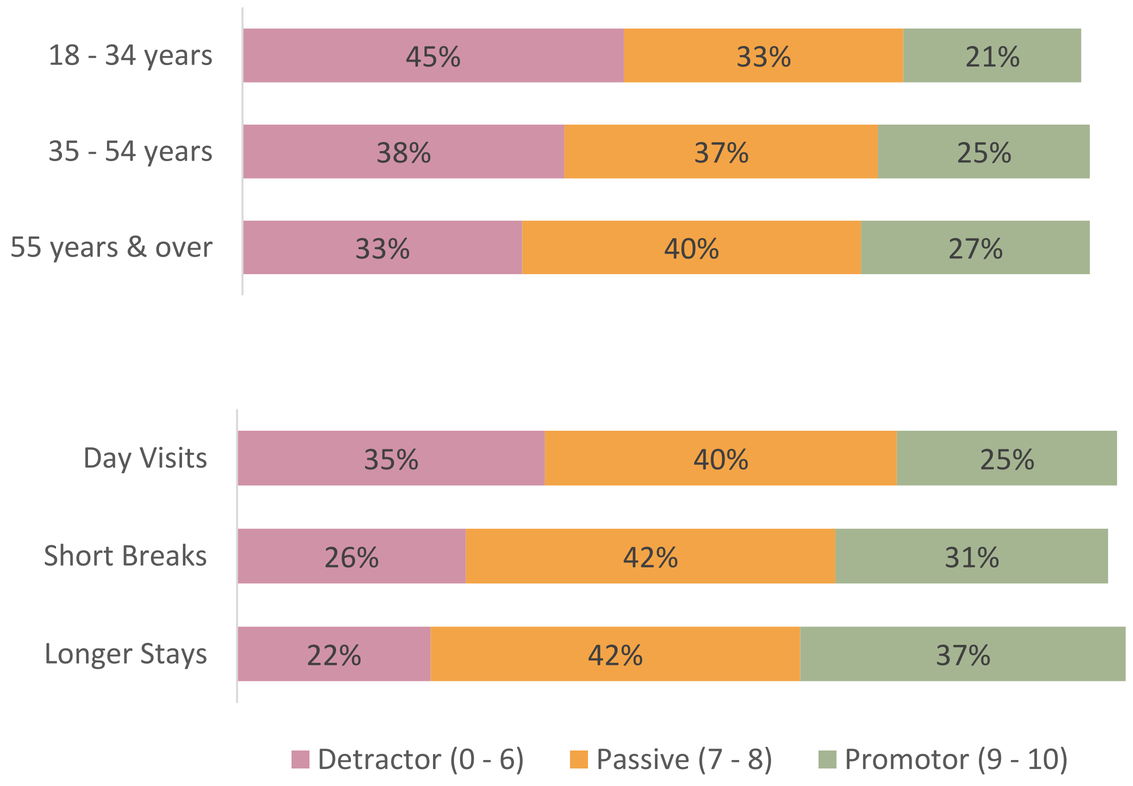
Recommendation of Kent

The longer visitors stay, the more positive they are about their experience and the more likely they are to recommend Kent. Older people are more positive about their visit and are more likely than young people to recommend Kent.

Overall Experience
(1: Not good at all – 10: Excellent)



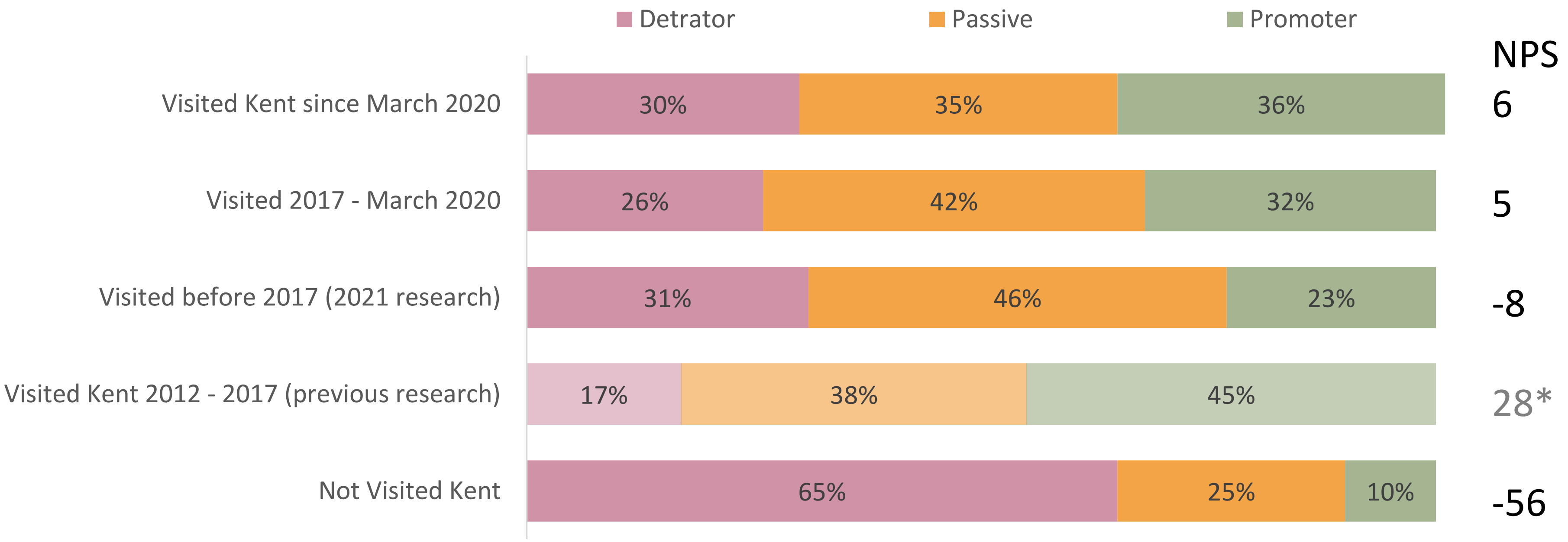
Recommendation
(0: Not at all likely – 10: Very likely)



Q19 Thinking back to your most recent trip to Kent, how would you rate your experience overall? Base: all who have visited Kent for a leisure trip or holiday (1,470)
Q20 And how likely is it that you would recommend a holiday or short trip to Kent to a friend or colleague?

Recommendation of Kent - Trend

There is a slight polarising of views among those who visited during the COVID period, with slightly more detractors and promotors than among those who visited 2017 – March 2020. Those who have not visited are, as would be expected, much less likely to recommend Kent.



* Previous research was carried out with a different sample that included people on the Visit Kent database, which is likely to have led to a more positive skew

Q20 And how likely is it that you would recommend a holiday or short trip to Kent to a friend or colleague? Base: All respondents (2001)

Opinion/Expectations

Perceived Strengths

- The attributes that Kent scores best on reflect the breadth of the offer the region has. Highest ranking overall are:
    - History and heritage
    - Quality of the natural environment
    - Range of attractions (also Things to do all year round and Range of outdoor activities)
    - Quality of food and drink
- The variety of strengths Kent has are then reflected in the high ratings for Something for everyone and Things to do all year round.
- These strengths clearly demonstrate the strength of the Kent offer and the opportunities to attract diverse audiences all year round.
- However, they also perhaps illustrate the challenge around clarity of identity. Other destinations may have a more focused reputation that can be easier to communicate (though also has the downside of not appealing to everyone).

Visitors vs Non-Visitors

- The overall opinions of Kent masks some important differences between those who have visited (recently) and those who have not visited Kent before (or did so long ago).
- Attributes for which the perceptions of Kent are broadly similar across recent visitors and those who have not visited before are:
    - The quality of the natural environment
    - The range of attractions and things to do
    - The quality of accommodation options

    These attributes therefore need 'reinforcement' in messaging rather than 'education'.
- In contrast, there are a number of aspects where the perceptions of those who have not visited or visited more than 5 years ago differ greatly from those who have visited recently:
    - Range of outdoor activities
    - Ease of getting around Kent
    - Ease of getting to Kent
    - Quality of Customer Service
    - Experiences that do not harm the environment

    Whilst accessibility will be impacted by non-visitors typically living further away, this highlights the need to continue to communicate around accessibility. Immersive experiences are important in building a stronger reputation around activities available in Kent.
- Those who visited Kent recently (since March 2020) are more positive than those who came before COVID (2017 – March 2020). The only aspect where that trend is reversed is quality of accommodation, reflecting the challenge that providers had during COVID. Quality of food and drink and the range of attractions score similarly before and during COVID, again reflecting limited choices and restricted experiences through the COVID pandemic.

Opinion/Expectations

Perceived strengths of Kent reflect the breadth of offer the region has with history and heritage, natural environment and the range of attractions rated highly.

Many of these attributes were included in the 2018 research. Overall the profile remains quite similar in terms of areas of strength and those that might be improved.

Cultural activities and offering a distinctive, authentic experience have slipped back a little from 2018.

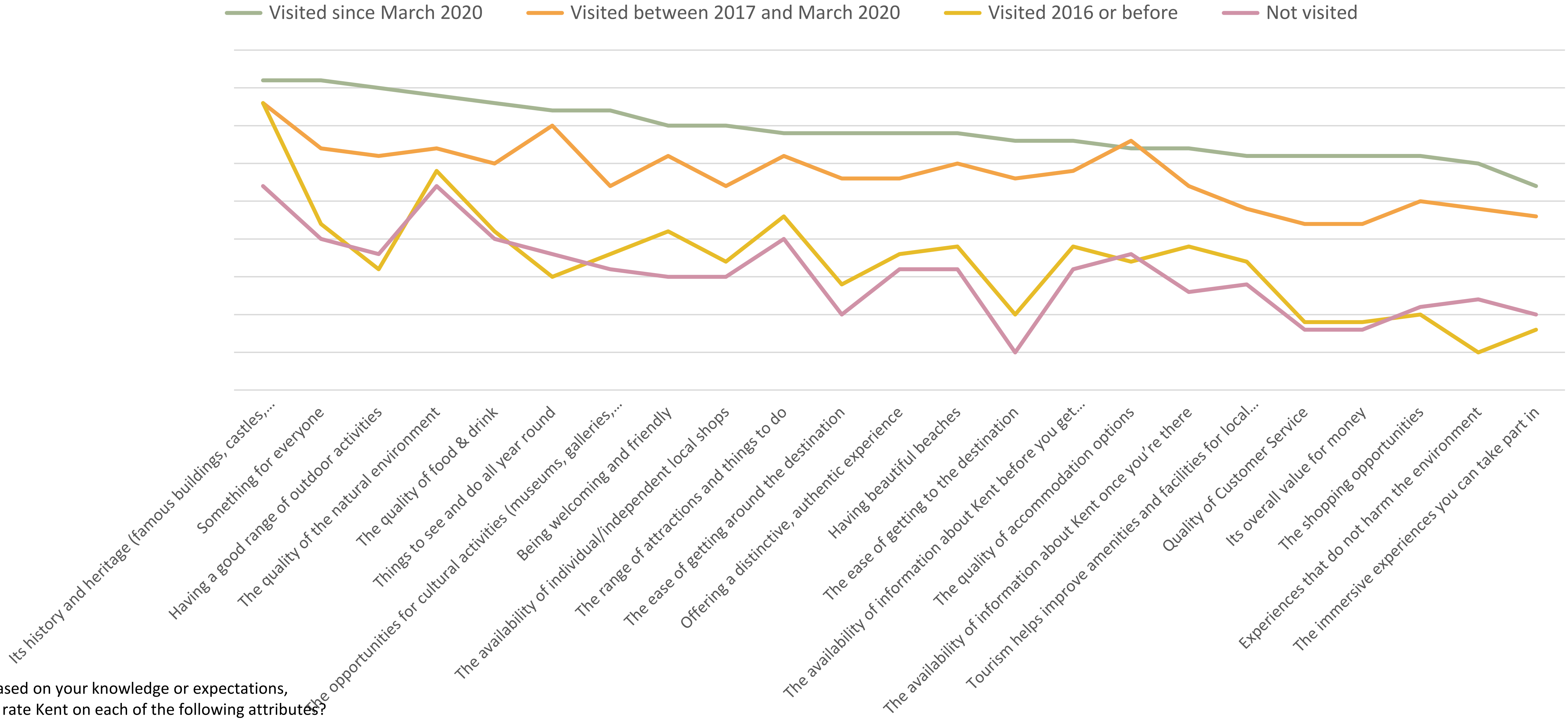
Range of outdoor activities, the welcome and quality of food and drink have improved from 2018.

Note: chart ordered on net: Excellent + very good

Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
Base: all respondents (2,001)

Opinion/Expectations

History and heritage and the natural environment are well-known both by visitors and non-visitors. The biggest gaps between perception and reality are in ease of getting to Kent, experiences that don't harm the environment and the range of outdoor activities.



Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
Base: all respondents (2001)

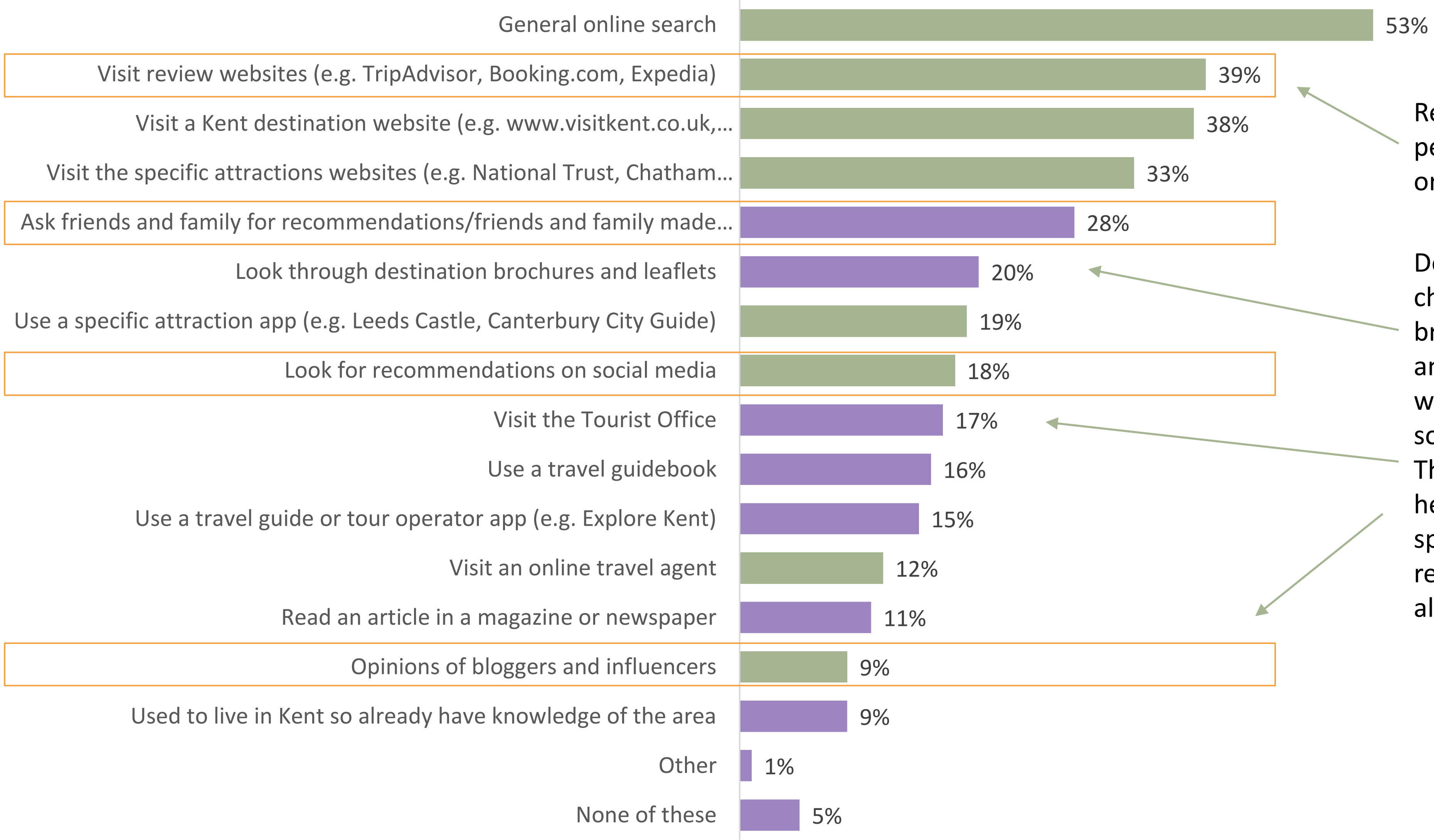



Purchase Journey and Motivations to Visit Kent



Sources of Information

Online sources are vital for potential visitors seeking out information, with the top 5 sources all online.
The importance of reviews and recommendations is also evident.



Review sites are used by more people than official destination or attraction websites.

Despite the dominance of online channels, the value of leaflets and brochures is evident, presumably among people already in the area, where the tourist office is also a source of information.
These channels are potentially helpful in increasing spend/extending stays/driving repeat visits among visitors already in the area.

Digital Channels

Offline Channels

Q42. If you were planning a future visit to Kent, which of these resources would you be likely to use to plan your visit?

Information Sources – the Role of Reviews

People use a variety of sources to inform their holiday choices, using review sites such as Trip Advisor, Instagram posts, bloggers and official sources. Use of reviews is 'savvy', seeking out similar people and 'reading between the lines'.

I'm a bit of a planner, so I'll like obsessively be all over Trip Advisor before we even sometimes make the booking because I want to know exactly what there is there to do and are those things actually like decent, are they good reviews for them

Family with young children

Photos and reviews are probably the two biggest things I'll look at. So if I find somewhere that's in the area that we want, available for the dates that we want and it's at the price point , that's kind of ticking all the boxes and then I'll look carefully at the photos to see does it look nice and we're not too fussy in terms of like, we don't mind if something is a bit kind of old-fashioned. I think for us the reviews have to be about the cleanliness

Adult group

I read the reviews, and I will read like hundreds of them

Family with young children

I use Trip Advisor, yeah Trip Advisor is used extensively obviously. Particularly if I was in a hotel. Obviously it doesn't really help with Airbnb as a rule, but Airbnb has got reviews on them, I always read reviews and I'll use Trip Advisor extensively when I'm there as well, for restaurants or what to do. I'm a prolific… I do a lot of research every time I do anything really

Family with children

I like to do a lot of research before any kind of trip, whether it be a long trip or a short trip, I usually have a rough itinerary in my head about what we might be doing, I do find sometimes if you're too spontaneous when you get there and try to arrange it, you spent half the time trying to phone around and find what you're doing

Family with young children

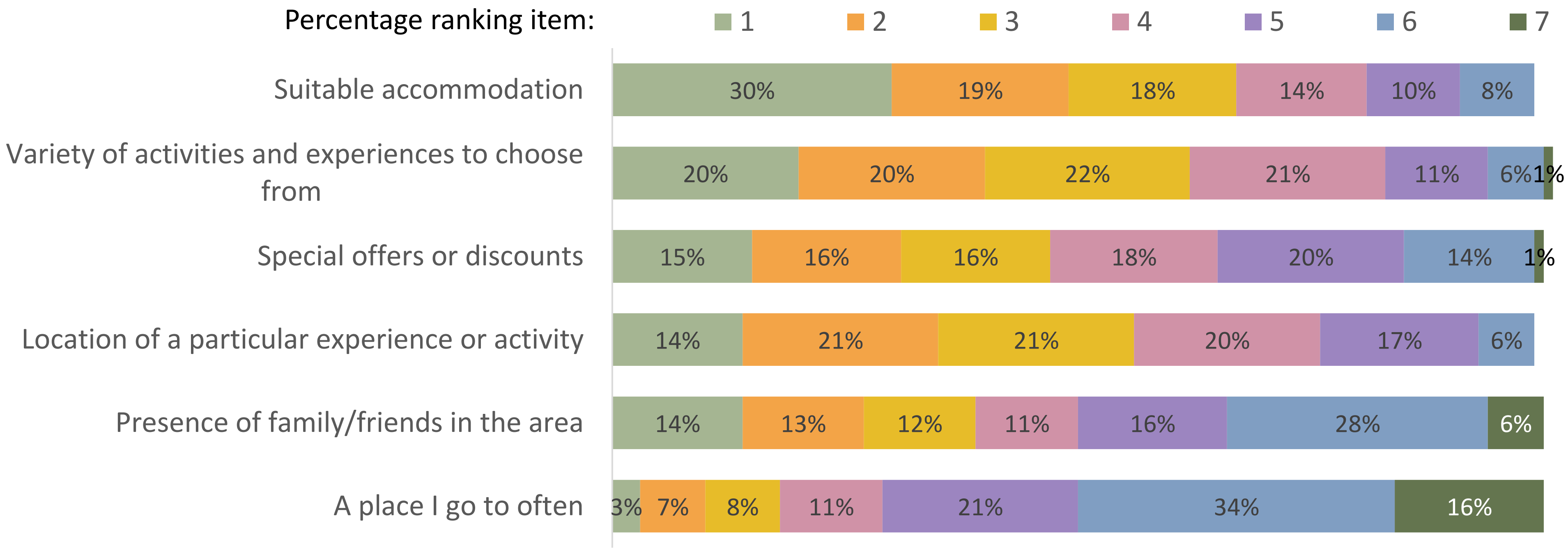
TripAdvisor, most of the time. I use a lot of the visuals, so on the websites and things, like I like to see what the playground is like, and what the pool is like. Even just Instagram. If you put in the hashtags into Instagram, then you can see the local area, so I would have Instagrammed the local beach, and things like that

Family with young children

Importance of Decision Influencers

Suitable accommodation is the highest ranked decision influencer followed by the choice of things to do.

Suitable accommodation is the most important item impacting the decision to take a holiday in Kent, with 30% ranking it 1st and almost half ranking it 1st or 2nd.



Q41 Below are a number of items that might impact your decision to take a holiday in Kent. Please put them in the order you would consider them, with the aspect you would decide on first at the top of the list.
Base: All respondents; 1,989

Information Sources and Decision Influencers

Feedback from the qualitative research adds insight into the decision-making process and illustrates the variation in how different people reach their holiday and activity planning decisions, both before and during the trip.

Planning in advance and making use of reviews and online channels.

I'm very much a planner and I will research what's in the area. And the other thing as well, with Instagram, sometimes you can find mummy bloggers that will do a whole piece on a certain thing in the area and I'll use them.

Family with young children

we just did a bit of research in terms of looking at the reviews and stuff like that and then we did that and then after that it was like "oh, okay fine, we're going there" and everyone was happy with it and that was it really

Adult Group

I will look at a place and think, "oh I like that," and put it on the group WhatsApp, and [my brother] will look into it further

Adult Group

Spontaneity is important for some and this is often where off-line channels (in destination) come to the fore.

When we arrive somewhere, have a quick look around where we're staying, and then find the tourist office, pick up a few leaflets, find out a bit of stuff if we haven't done any research. We don't always like to do the research before because it's nice to go there and be spontaneous. Also, there's things you don't know unless you go to the tourist office

The fact there's [a tourist information centre] there, means to me they're thinking about tourism, they're proud of the area, there's stuff to offer and they want to help people experience it and enjoy what's on offer. There's someone there that's able to help people

Family with disabilities

Research and Booking Lead Times

Despite the impact of COVID making some people wary of booking too far in advance, the research and decision-making process is still done over a longer period of time for most.

[Last visit to Kent] it was a planned one, I'd booked it, I don't know, like two, three months ahead

Family with older children

Probably between 12 and 9 months [before], the research starts probably about then in terms of finding places, because we originally, we weren't meant to go to that hotel, we were going to stay in a hotel in Canterbury, but we then found this other hotel which provided parking as well, so we were like actually that was going to be easier for all of us.

Adult Group

I love itinerary planning, I love it. I take pride in creating the perfect trip

Couple no children

we're looking now to book for April and June next year, so Easter holidays and the Whitsun holidays.

Family with younger and older children

we book main holidays so that we've definitely got something but then like, I don't know, a bank holiday weekend or something, we just like to have a bit of an explore, a bit more impulsive

Family with young children

I would probably say between two and eight weeks or something like that [to book]

Family with disabilities

It can be as far away as a year, yeah because obviously with school holidays and things like that, we have to sort of juggle it around, and prices as well. In the school holidays, we do find that it pretty much doubles, so we always try and find the cheapest option because some weeks are cheaper than others

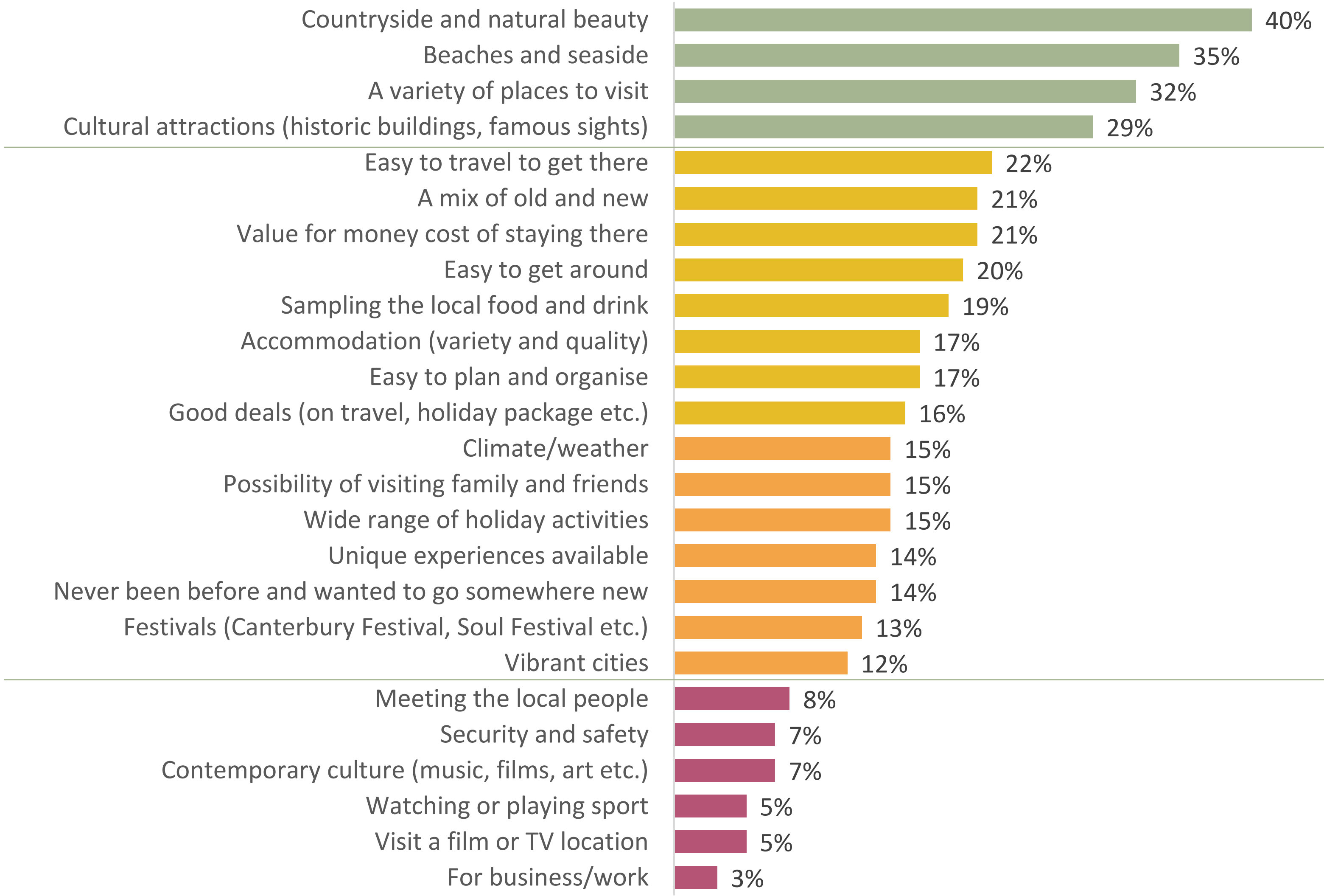
Family with younger children

It was actually quite a last-minute thing. We were meant to go to Barcelona, for a few nights. And a variety of things…my sister was really ill… I looked at the weather forecast for Barcelona was just horrendous. And I was like, 'Actually, I'm just not…' So, we cancelled... So, I was like, 'What else…what can we do that's something a little bit different?'

Family with older children

Reasons to visit Kent

Natural elements (countryside and beaches) are the most common motivators to visit Kent.



Core motivators cover the main elements of Kent – variety through countryside, beaches and cultural attractions.

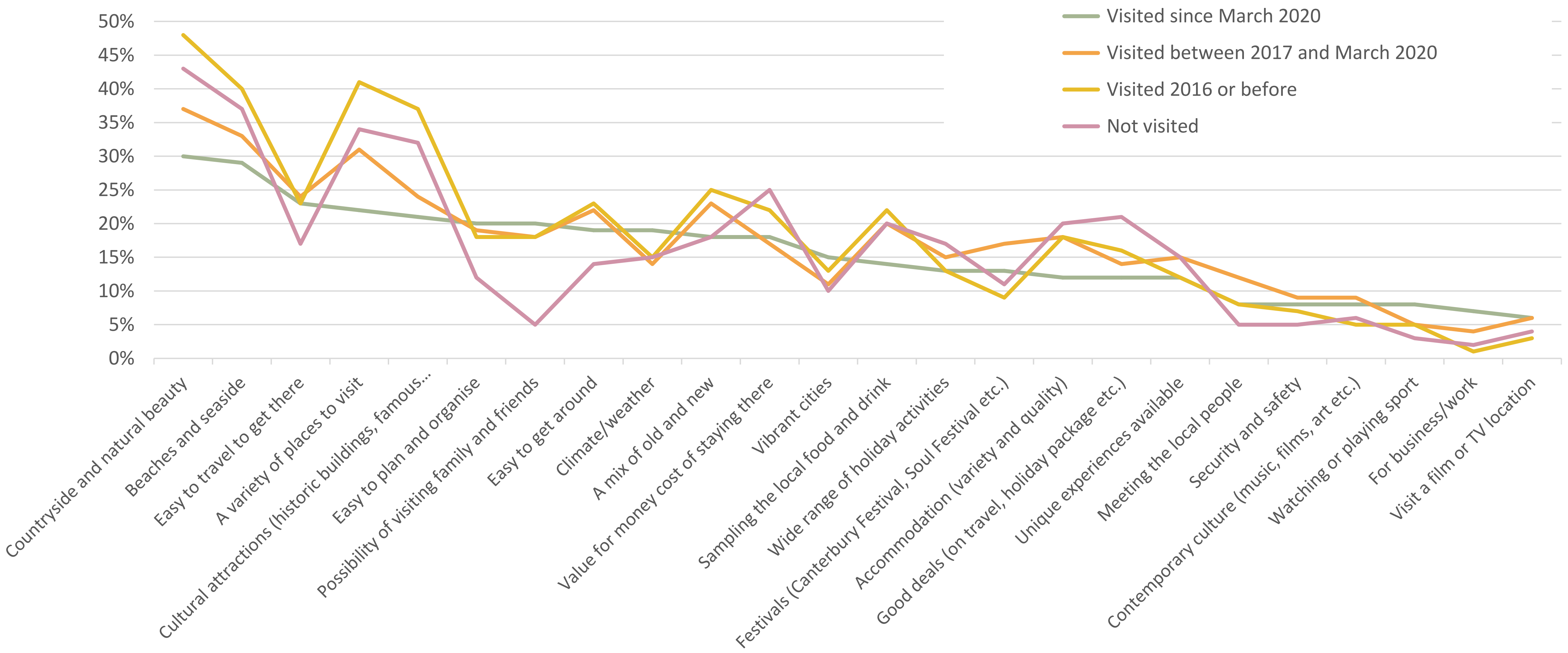
Ease of access and ease of getting around are relevant supporting messages, particularly when marketing to people from outside of the South East.

These elements do not motivate visits to Kent and are therefore not likely to be relevant to communicate.

Q51 And which of the following are reasons why you would choose to visit Kent? Base: Will definitely visit / consider visiting Kent in the future (1,989)

Reasons to visit Kent

Natural elements (countryside and beaches) are the most common motivators to visit Kent despite recency of visit.



Q51 And which of the following are reasons why you would choose to visit Kent?
Base: Will definitely visit / consider visiting Kent in the future (1,989), Visited since March 2020 (377), Visited between 2017 and March 2020 (573), Visited 2016 or before (573), Not visited (531)

Reasons to visit Kent

VISIT KENT BUSINESS GARDEN of ENGLAND
Interreg France (Channel Manche) England EXPERIENCE European Regional Development Fund
EUROPEAN UNION European Regional Development Fund
XV Insight

Postcards home from people interviewed in the qualitative research

POSTCARD

what we like about Folkestone is, we can park our car and basically leave it there for the week, and we can walk, and lots of things are really in walking distance. We can walk into the town, we can walk across the road to the beach, spend some time on the beach

Family, older children

POSTCARD

you often see things like oast houses and there's a lot of history in terms of some of the architecture, I quite like because it's kind of like living history. I think it's quite nice that some areas in Kent have sort of retained that aesthetic, those sort of original style buildings and it looks really quite quaint, really quite pretty

Family, young children

POSTCARD

you could either do a coastal break or you could do a countryside break, or you could do both, means that it's quite a versatile county to visit

Family, young children

POSTCARD

There's some quite nice towns like Tunbridge Wells. It's quaint and a bit middle class and nice and quite a nice place, clean. Then there's also the countryside and stuff like that. There's scenery that's lovely. There's also, which I have more of an interest in, the coastal towns

Family with disabilities

POSTCARD

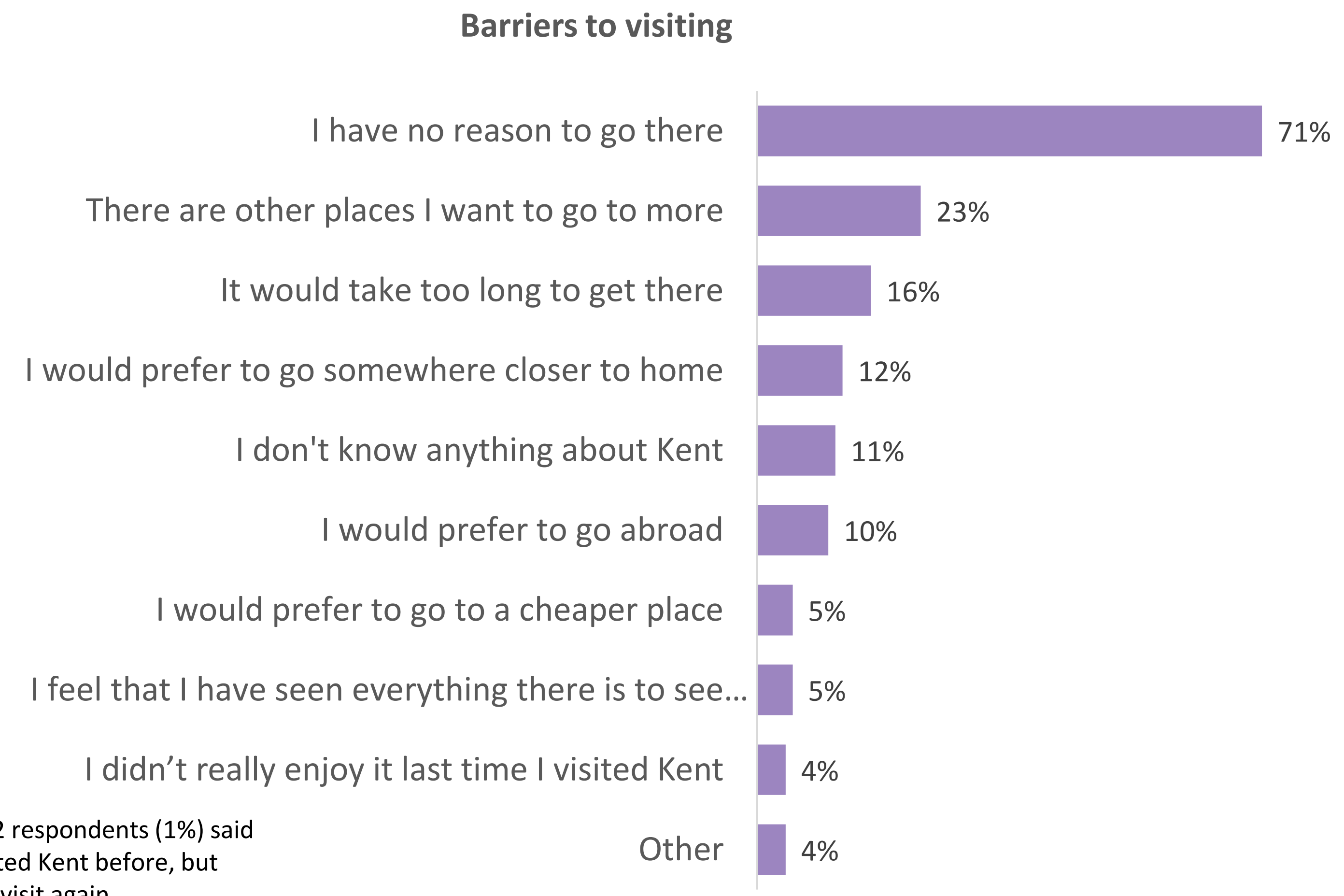
you're never more than an hour from the coast, you're never more than twenty minutes from a really nice National Trust place

I always say that Kent has got some really lovely countryside

Couple

Barriers to visiting Kent

Barriers to visiting Kent among those who have never been centre on 'having no reason to visit'. This suggests there is still an opportunity to communicate the Kent offer to inspire current rejecters.



Given the range of things that Kent is positively perceived for, the main barrier to visiting is a lack of strong motivation to travel to Kent. Many will live a long distance away and believe it 'not worth the journey' but equally it demonstrates the value in strong messaging of the Kent offer, its uniqueness and compelling reasons to visit.

Note: only 12 respondents (1%) said they had visited Kent before, but would never visit again

Q7 Why would you not consider visiting Kent for a short leisure trip or holiday in the future?
Base: 387 Never visited Kent before and not intending to visit in future

Reasons not to visit Kent

Postcards home from people interviewed in the qualitative research.

POSTCARD

I wouldn't go to Dover. Because of the whole immigration thing, it just annoys me so much, so I wouldn't stay in Dover. Really the only thing I would say is a negative for Kent because I think it seems like it's the gateway to everybody comes in over from Dover

Family, young childre

FOR ADDRESS ONLY

PLACE STAMP HERE

POSTCARD

[Kent] quintessentially English seaside towns. That's the kind of environment I would describe it. But then there's Folkestone which is also slightly different. There's also Dover which is an absolute dump. It's really horrible and Ramsgate's not great

Family with disabilities

FOR ADDRESS ONLY

PLACE STAMP HERE

POSTCARD

Nobody could even so much as open a packet without being attacked by seagulls. And I mean, properly attacked

Family, young children

you get the perception of Kent as being two halves… you've got the more Home Counties side… and the more industrial-y side

Family, older children

FOR ADDRESS ONLY

POSTCARD

There's a lot of poverty in a lot of these coastal towns in Kent. You look at the stuff that's happened over the years with Kent and the stuff with the migrants and stuff like that, quite right wing rhetoric.

Family with disabilities

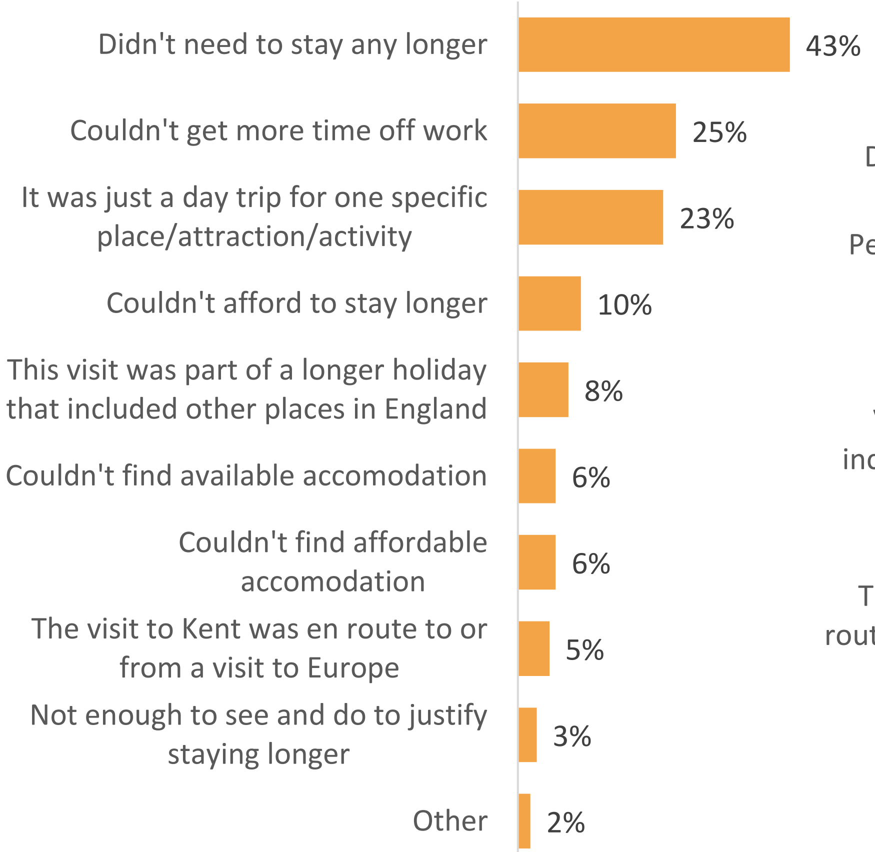
FOR ADDRESS ONLY

PLACE STAMP HERE

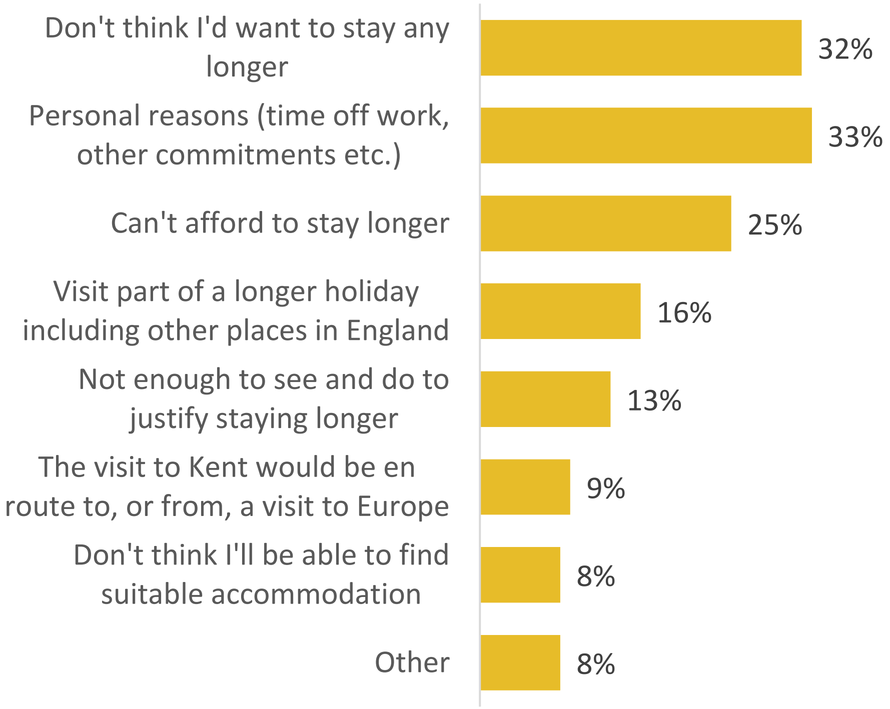
Importance of Decision Influencers

Barriers to longer visits to Kent are often beyond the direct influence of Visit Kent, though there is a potential opportunity around deals that give extra nights accommodation enabling the visitor to stay longer and increase spend on experiences, food and drink etc.

Barriers to staying longer on last visit



Barriers to not intending to stay longer



The potential for experiences to drive longer stays is evident, along with calendarised events/ festivals that can extend visits.

Triggers to staying longer

Q15 Why did you not stay longer on your last/latest visit? Base: 1177 whose last visit to Kent was a day trip or short break (1-3 nights)
Q39 Why would you not stay longer on a visit to Kent? Base: 327 who will be likely visit Kent for a day trip or short break (1-3 nights) in future
Q40 What, if anything, would make you plan a longer stay in Kent? Base: 327 who will likely visit Kent for a day trip or short break (1-3 nights) in future

Inspiration to Visit Kent

Active and Outdoors

Food and Drink

History and Heritage

Within the research, respondents were shown sets of images and asked which would really inspire them to visit Kent.

The choices reflect what is seen elsewhere in terms of the breadth of assets that Kent is known for.
It also illustrates the type of imagery that interests potential visitors.

Arts and Culture

Wellbeing

Exciting and Unexpected

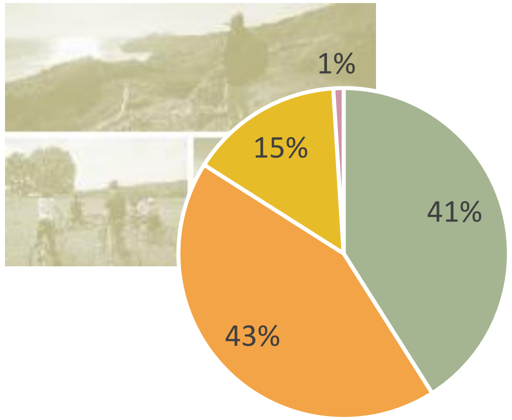
There is overlap in who is inspired by each set of images and the deep dive section contains further insight into the appeal of each theme.

Q35 Below are sets of images that depict different types of themes and experiences that people might experience on a visit to Kent. To what extent does each set inspire you to want to visit Kent? Base: All respondents (2,001)

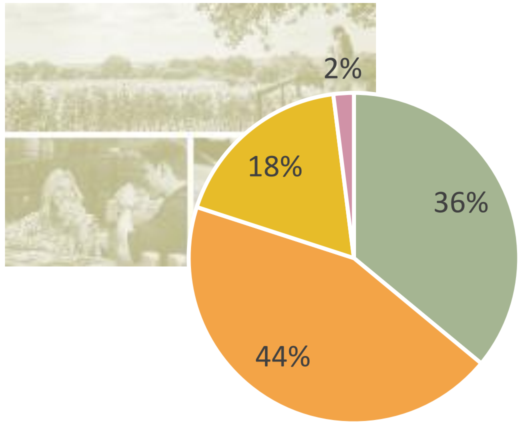
Inspiration to Visit Kent

Real desire comes from the active/outdoors, while food and drink and history and heritage have ‘comfortable’ appeal. Wellbeing remains a niche concept as a holiday activity.

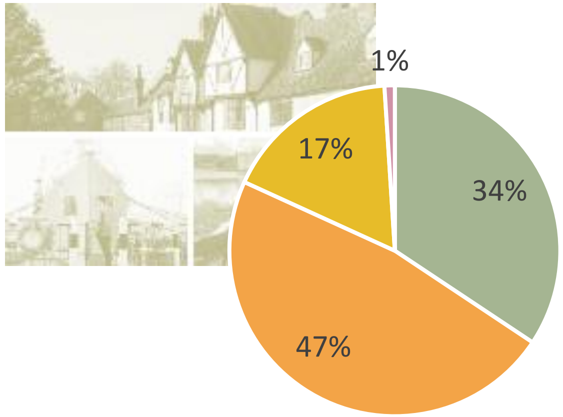
Active and Outdoors



Food and Drink

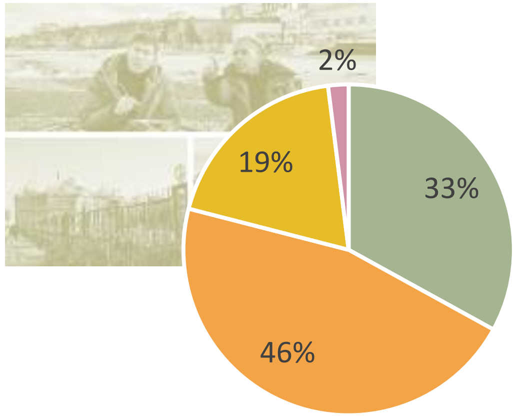


History and Heritage

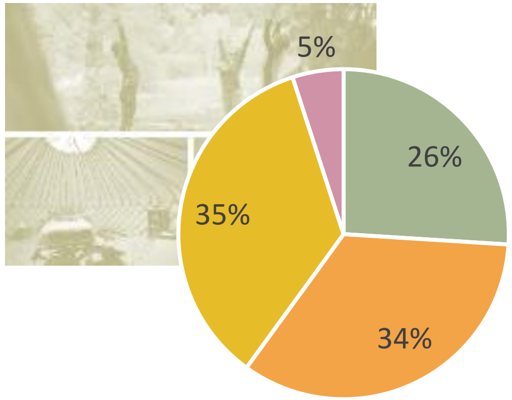


Really inspires me to visit Kent
Inspires me a little
Doesn't really appeal to me
Puts me off visiting Kent

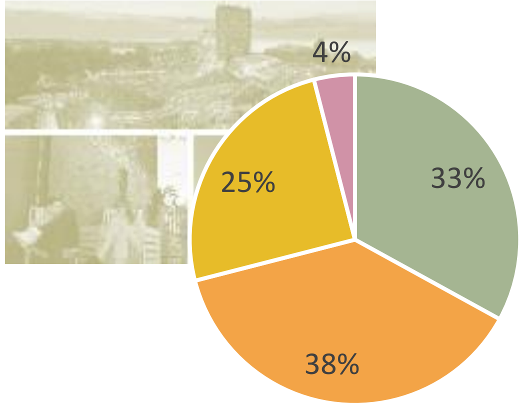
Arts and Culture



Wellbeing



Exciting and Unexpected



Q35 Below are sets of images that depict different types of themes and experiences that people might experience on a visit to Kent. To what extent does each set inspire you to want to visit Kent? Base: All respondents (2,001)



Perceptions



Word Associations with Kent

VISIT KENT BUSINESS GARDEN of ENGLAND
Interreg France (Channel Manche) England EXPERIENCE European Regional Development Fund
EUROPEAN UNION European Regional Development Fund
XV Insight

Spontaneous descriptions of Kent are generally positive, calm, and reference countryside more than beaches. Garden of England features quite strongly.

Respondents were asked for spontaneous words to describe Kent. The result is a mix of both attributes of Kent (countryside, coast, seaside etc.) and emotive descriptors (interesting, fun, beautiful etc).

Those who have visited Kent are more likely to use emotive words (fun, nice, relaxing etc.) while non-visitors are more likely to name specific places (Dover, Canterbury) and the countryside.

Some non-visitors describe Kent as 'expensive' and 'posh'. Attributes that may contribute to some non-visitors not considering Kent as they perceive it to be too pricey for them.

Q25b What are the top 3 words that come to mind when you think of Kent as a leisure destination? Base: All respondents (2,001)

Word associations with areas of Kent

Word associations with each region, reflect what was seen previously in the Visitor First Research.

	West Kent	North Kent	East Kent
Visitor First Research	"Provides a clear break with the norm, in terms of planning a day out for the older audiences whilst enabling younger audiences to pursue their particular interest in local food and drink"	"Meets the need to be accessible and again rewards the 'explorers'"	"Fulfils the need for fun. It enables older visitors to share their knowledge with friends, whilst it also fulfils the need for younger visitors to discover"
Visitor First Positioning	**Freedom is calling**	**Curiosity is calling**	**Imagination is calling**

2021 Research

West Kent: Proud Imagination Expensive Ripe Shabby Freedom Picturesque Bright Crowded Heraldic Lush countryside Eclectic Bold Cheap & cheerful Diverse Fun Genteel Nostalgic Luxury Informal Strong Inspirational Curiosity Hidden gem Undiscovered

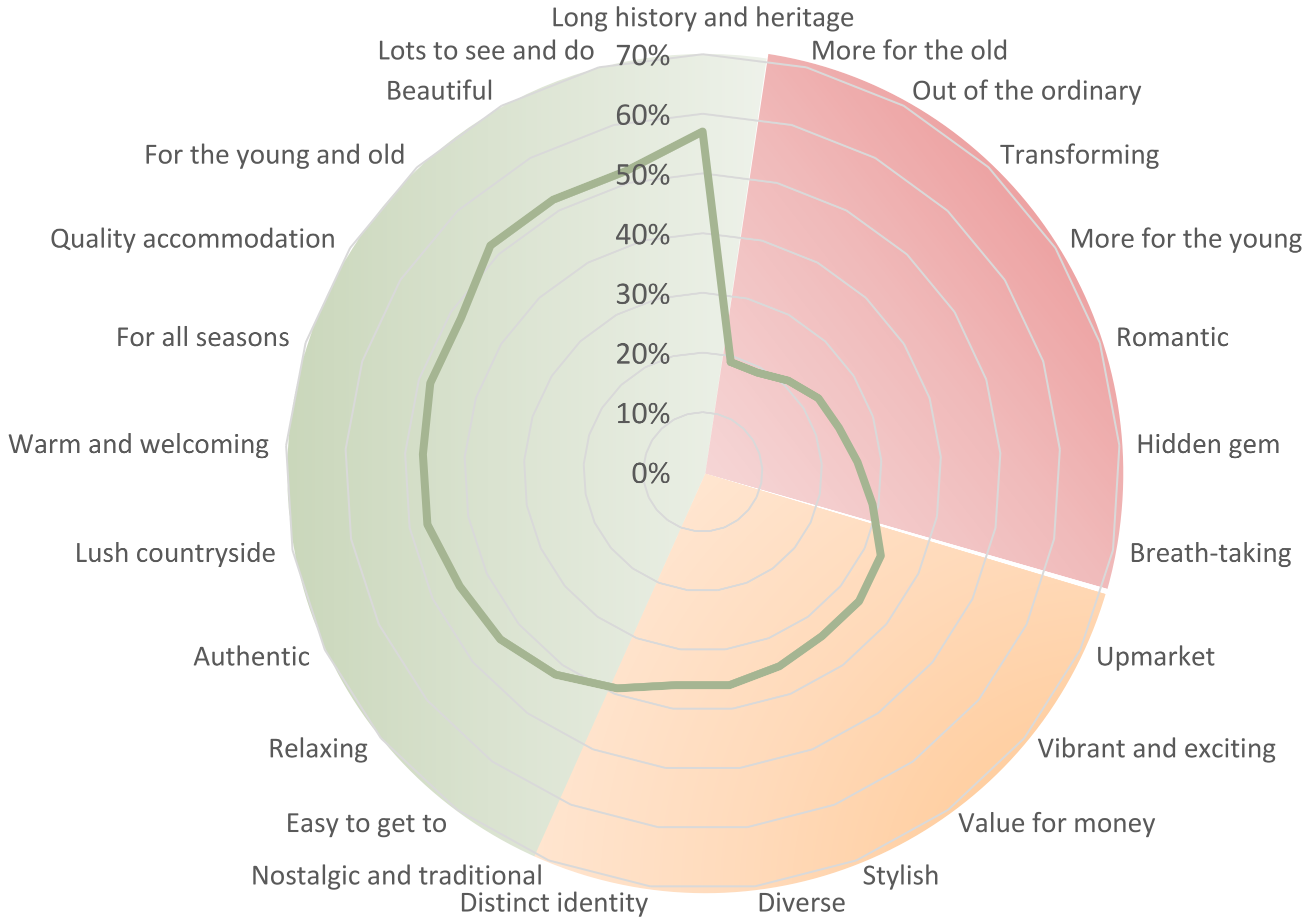
North Kent: Genteel Crowded Inspirational Diverse Heraldic Imagination Luxury Proud Ripe Informal Strong Expensive Bold Shabby Nostalgic Cheap & cheerful Hidden gem Freedom Fun Bright Eclectic Lush countryside Picturesque Undiscovered Curiosity

East Kent: Lush countryside Proud Expensive Nostalgic Imagination Eclectic Informal Undiscovered Cheap & cheerful Ripe Bright Fun Bold Genteel Strong Diverse Shabby Curiosity Inspirational Freedom Heraldic Luxury Hidden gem Crowded Picturesque

Q36 Kent can be divided into three areas: West Kent, including places such as Maidstone, Sevenoaks, Tunbridge Wells, Malling and Ashford East Kent, including places such as Canterbury, Margate, Folkestone, Sandwich and Dover North Kent, including places such as Rochester, Chatham, Sittingbourne, Dartford and Isle of Sheppey Which of the following words do you associate each destination with? Base: All who have visited Kent (1,470)

Statement association - Kent

Kent has core strengths around its history and heritage and the range of things to do. Opportunities to strengthen its perceptions are around vibrancy and value. Challenges to work on may be around more targeted positioning (for the young and/or old).

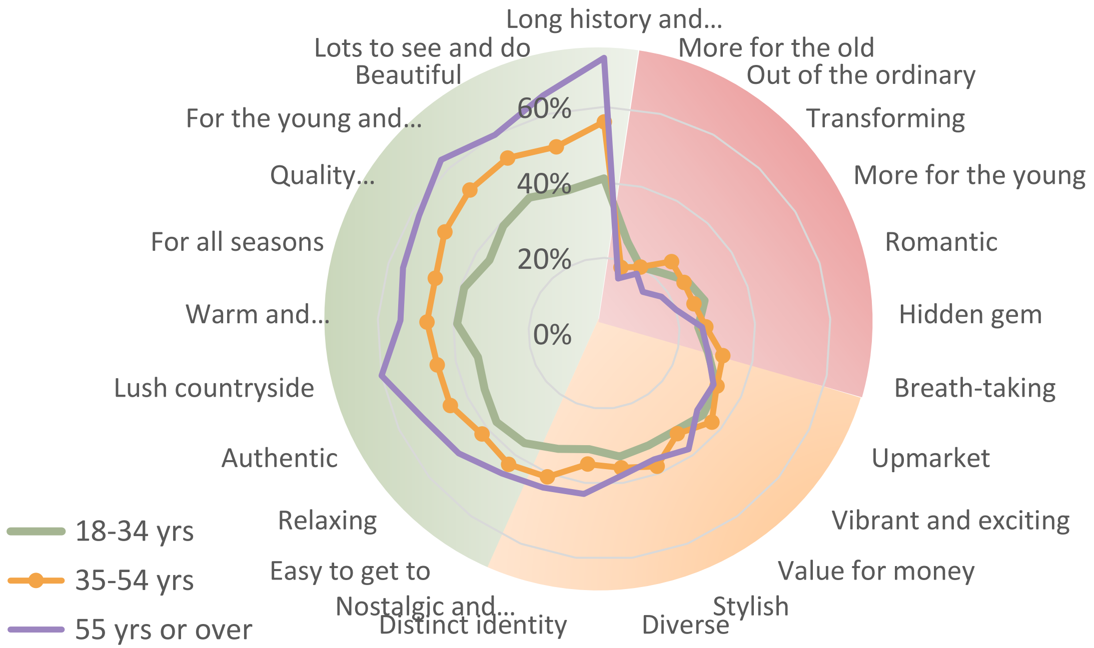


Associations with Kent are broad covering both its history and beauty. It is seen as a destination with lots to see and do for people of all ages. Quality accommodation is also a strength.

Because Kent is seen as a place for all ages, it is not seen as specifically for the old or for the young.

Kent is not perceived as 'out of the ordinary or as a 'hidden gem', attributes that would perhaps strength its position as a 'go to' destination.

Older people are more positive about Kent's strengths but do not score differently on areas the county is not so recognised for.

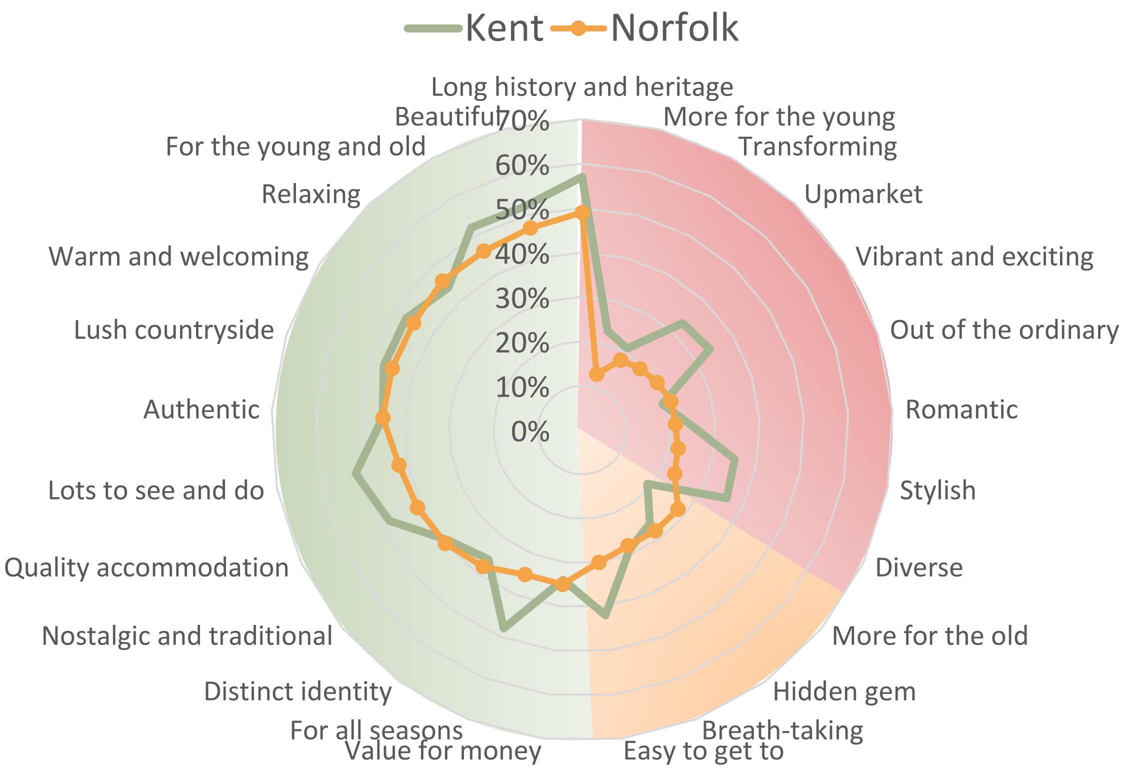


Q33 Now we are going to show you a list of things people have said about different destinations for holidays and short breaks in the UK. Thinking about each statement, please indicate which destination or destinations in each row you associate with that statement. You can select as many or as few destinations for each statement as you like, or 'None of these' if you don't think the words describe any of the destinations shown. Base: All respondents (2,001)

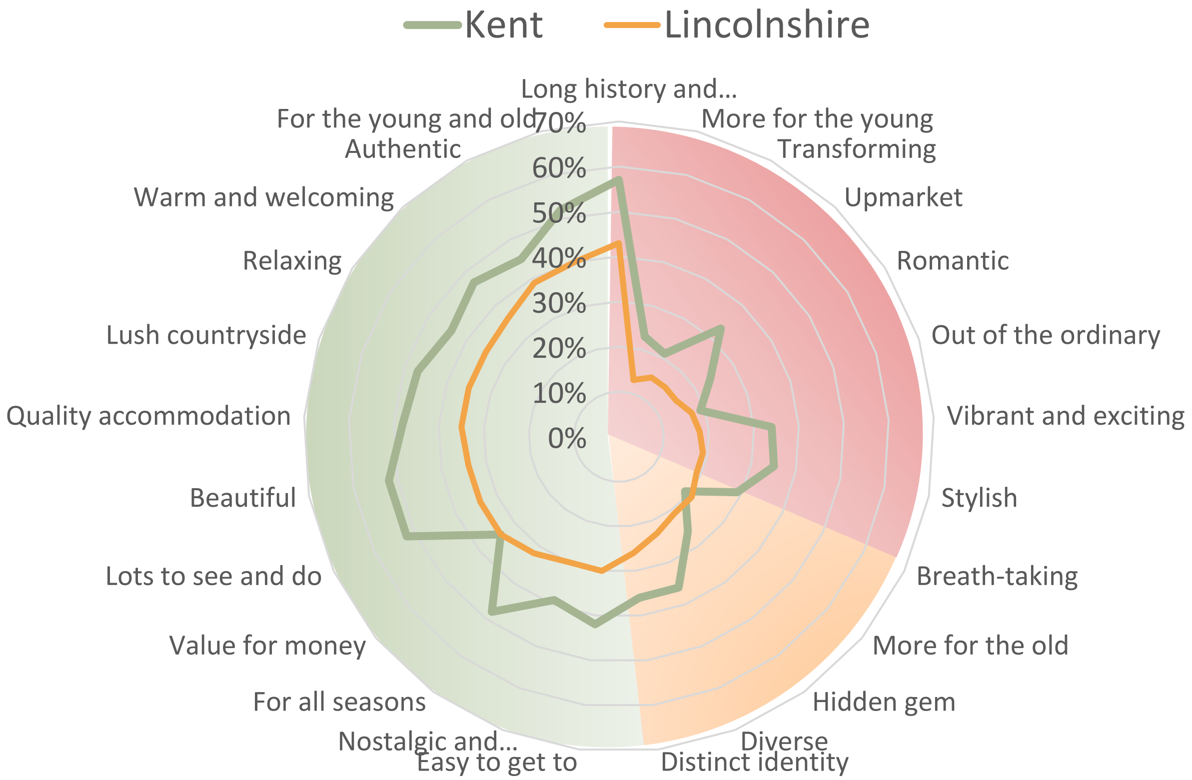
Statement association – Norfolk & Lincolnshire

Norfolk and Lincolnshire have relatively low understanding and lack reputation for vibrancy and out-of-the-ordinary uniqueness. Their core strengths are similar to Kent around a calm relaxing destination with authenticity and beauty

Kent scores at similar levels to Norfolk with competitive advantage coming through aspects such as lots to see and do and quality accommodation. Kent is also seen as more upmarket, vibrant, stylish and diverse.



Kent outperforms Lincolnshire on all attributes with the exceptions of value for money, out of the ordinary and 'more for the old' where the two counties have similar scores .



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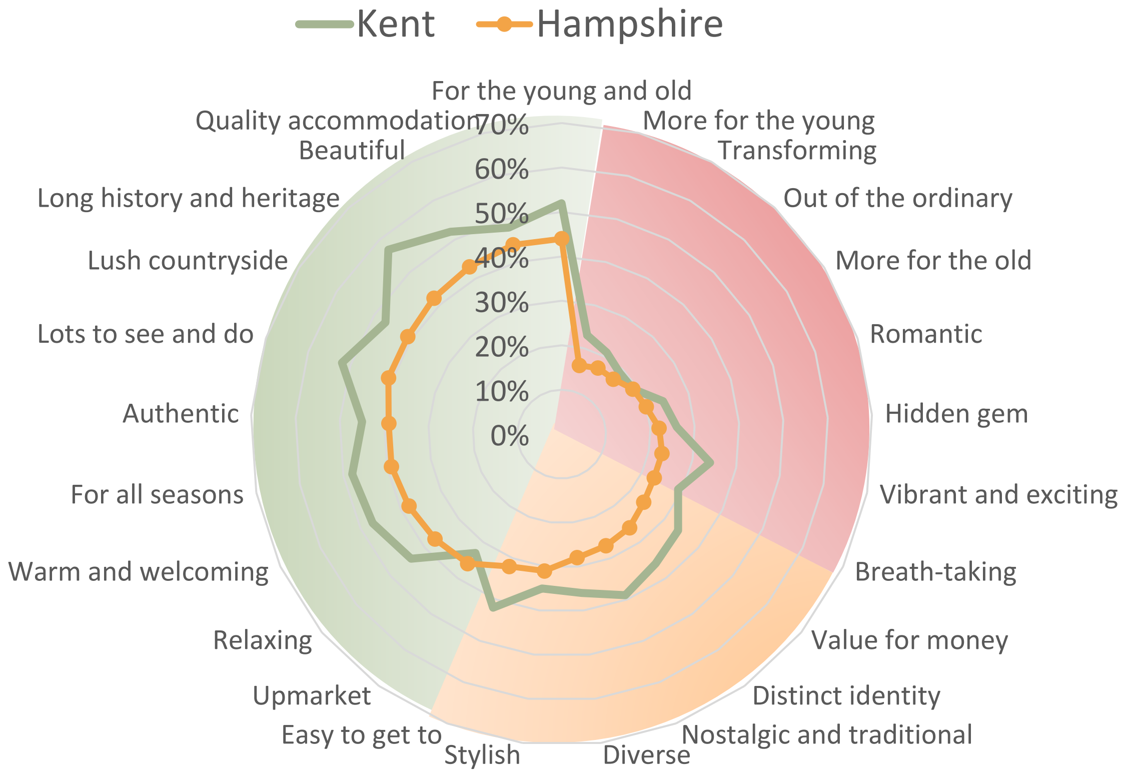
Base: All respondents that do no live in specific county; Norfolk (1,742), Lincolnshire (1,790)

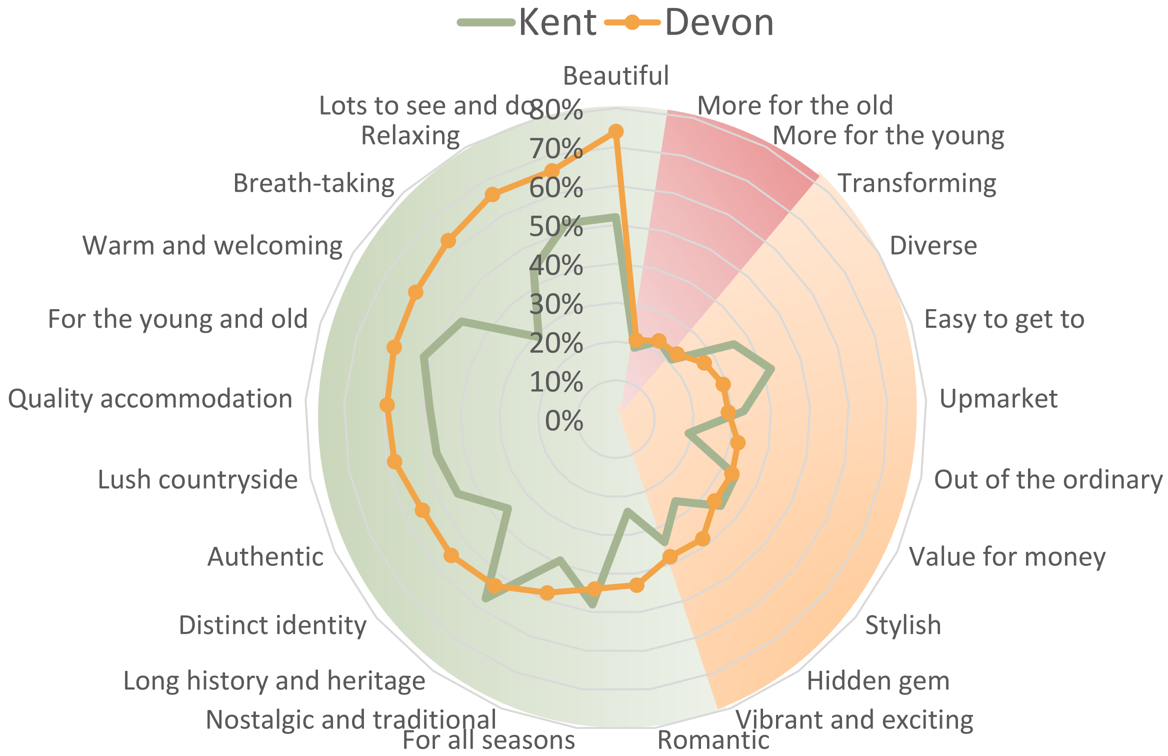
Statement association – Hampshire & Devon

Hampshire, like the other competitors has lower levels of all perceptions, but is recognised for its heritage and its beautiful countryside. Devon stands out with much greater public understanding with plenty to see and do.

Kent outperforms Hampshire on most attributes, with only ‘easy to get to’ romantic and ‘more for the old’ rating at similar levels.



Devon generally scores higher than Kent (and all other counties tested). However, Kent still has some notable competitive advantages over Devon: ease of getting to, history & heritage, for all seasons and diverse.



Q33 Now we are going to show you a list of things people have said about different destinations for holidays and short breaks in the UK. Thinking about each statement, please indicate which destination or destinations in each row you associate with that statement. You can select as many or as few destinations for each statement as you like, or ‘None of these’ if you don’t think the words describe any of the destinations shown.
Base: All respondents that do no live in specific county; Hampshire (1,775), Devon (1,673)

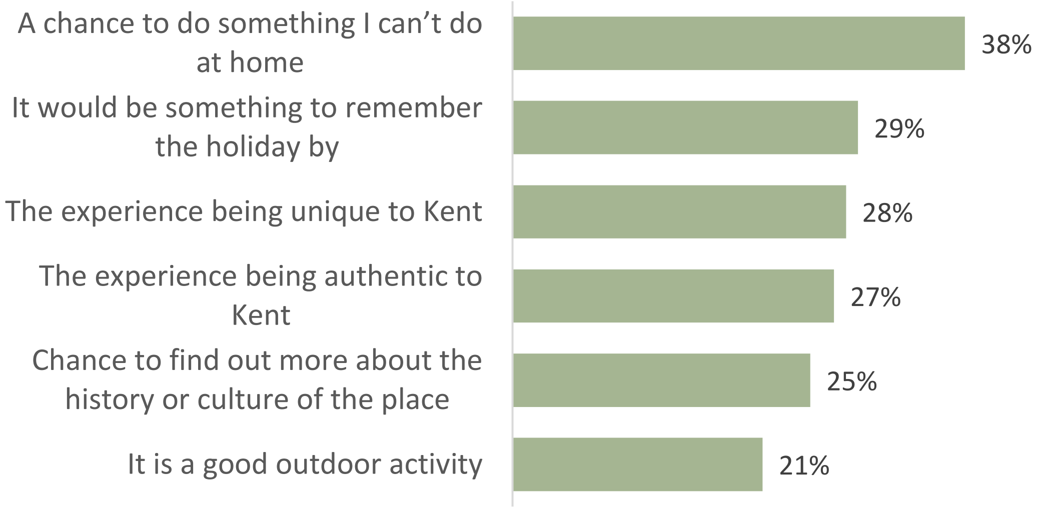


Immersive Experiences



Immersive Experiences

- The research explored interest in many of the immersive Experiences available in the Kent visitor experiences portfolio.
- Previous VisitBritain research identified:
  - How experiences that are unique and authentic can drive holiday choice
  - The role experiences can play in extending visit duration
- Interest levels in individual immersive Experiences differ and are often linked to familiarity and the extent to which the experiences is established and recognised.
- Immersive experiences are a key part of the holiday and the creation of memories.



- Among the Immersive Experiences tested in this research, the most popular are typically well-known or 'obvious' experiences:
  - Rural Landscape Experiences – River tours, Wildlife reserve experiences and Nordic walking
  - Food & Drink Experiences – Vineyard, Cidery and Brewery tours
- Under 35's are typically the most interested in experiences and those 55 and over the least so.
- Interest in experiences is often higher among people living in London.
- There is a greater interest in experiences among those who would stay a week or more, highlighting the potential for experiences to extend visit duration.
- Experiences are typically of greatest interest to Buzzseekers. Adventurers and Culture Buffs also over-index.

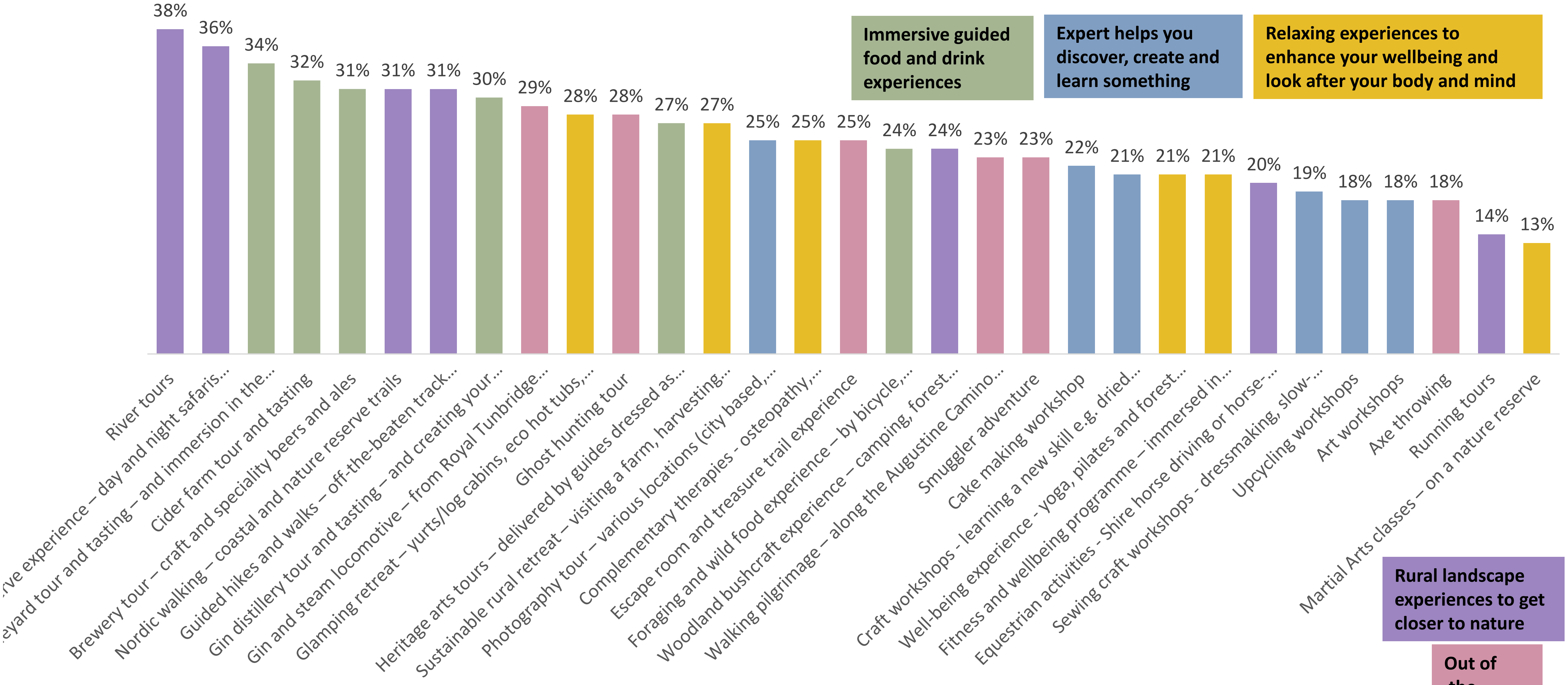
Actions and Opportunities

Focus on clarity of offer and communication:

- Description of what the experience is (what the visitor will actually experience) in accessible language and imagery
- Communicate its authenticity and why it is unique to Kent
- Clarify 'target' audience – is it for adults or children? Individuals or groups? Etc.
- Provide core details – how long, how much, where it is etc.
- Inspire the target audience – what they will get out of the experience, compelling reasons to take part etc.

Immersive Experiences

Rural landscape and recognisable food and drink experiences are the most popular overall, with learning and wellbeing experiences having lower interest levels;.



Q57/58/59 Would you consider doing any of these ….experiences …..in the future whilst on a holiday or short break in Kent?
Will definitely visit / consider visiting Kent in the future (1,989)

Experiences Driving Motivation to Visit

The qualitative research provided illustration of the role unique-to-Kent experiences can have on driving motivation to visit.

Within the qualitative research there were several examples of trips being planned around specific attractions or experiences.

> the reason we picked that one was because of the little steam train
>
> Family with small children

> Port Lympne. The safari park, that was a night glamping. So, I was like, 'What can we do that's something a little bit different?
>
> Family with older children

One couple were inspired to visit by a Canterbury Tales walking tour:

> Neither of us drive so we couldn't really go up to the Lake District or anything like that, or Cornwall, so we thought, 'okay, let's do locally in the South.' And we thought, '[Canterbury Tales] pilgrimage sounds really fun.' My partner just loves walking, I like walking as well, he loves it. So, yeah, we just thought, 'yeah, do you know what, that, it sounds a bit different, it sounds fun, let's do it, it's an adventure.'
>
> Couple, no children



Transport



Transport

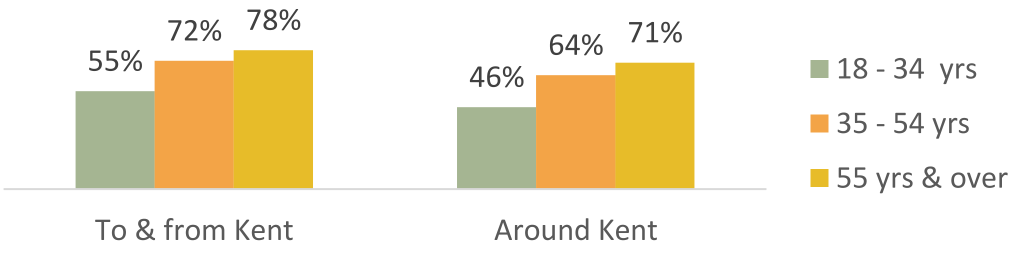
Car dominates mode of transport both to and from Kent and getting around whilst in Kent.

Whilst car dominates transport to/from and around Kent, there are some small movements between past visits and future visits.
Public transport usage to get to Kent in future has declined marginally from past visits and may reflect the impact of COVID on attitudes to public transport (see following slide).
There are increases in what might be considered sustainable transport (see following slide), with more people interested in cycling and walking when in Kent.

	Past Visit		Future Visit	
	Getting to and from Kent	Getting around Kent whilst there	Getting to and from Kent	Getting around Kent whilst there
Train	19%	5%	18%	6%
Bus	4%	10%	3%	9%
Organised coach tour	3%	3%	3%	3%
Car (own, friends, hired)	68%	64%	69%	61%
Taxi	1%	4%	1%	3%
Motorcycle	1%	1%	1%	1%
Motorhome	1%	1%	2%	1%
Bicycle	1%	1%	1%	2%
Walk/hike	1%	10%	1%	13%

Car usage increased with age. It is also higher among those from the South East (79%) and lowest among people from London (52%) with 30% intending to travel to Kent by train.

Younger people are more likely to walk (17% of 18 – 34 year olds) and those visiting in an adult group (16%).

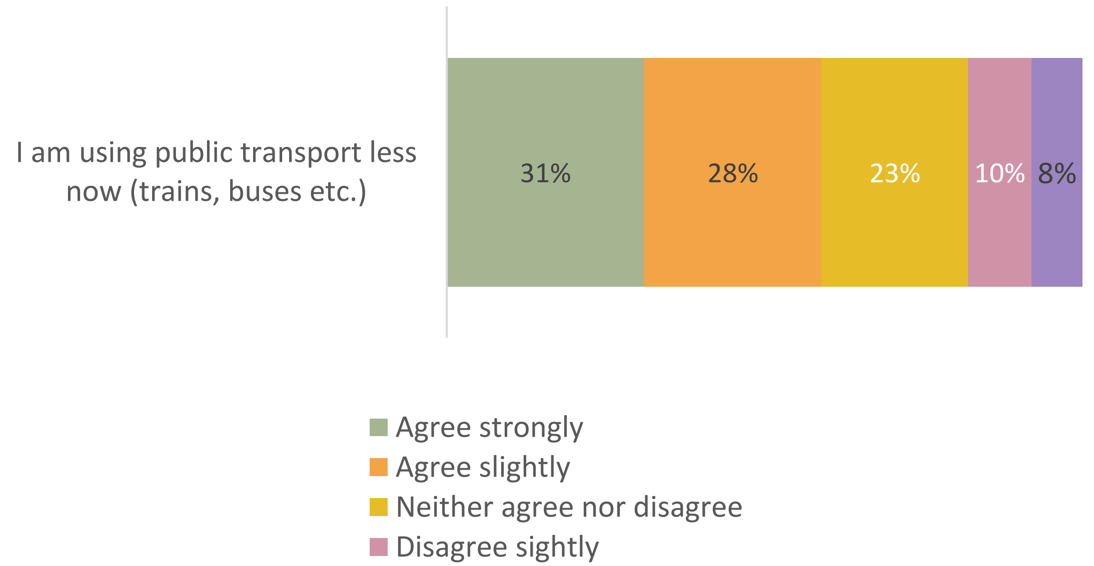


Q22 What was the main method of transport you used on your latest visit/short break/holiday to Kent?
Q45 What is the main method of transport you would use on a future visit/holiday to Kent?

COVID response and Green Transport preferences may be impacting travel choices

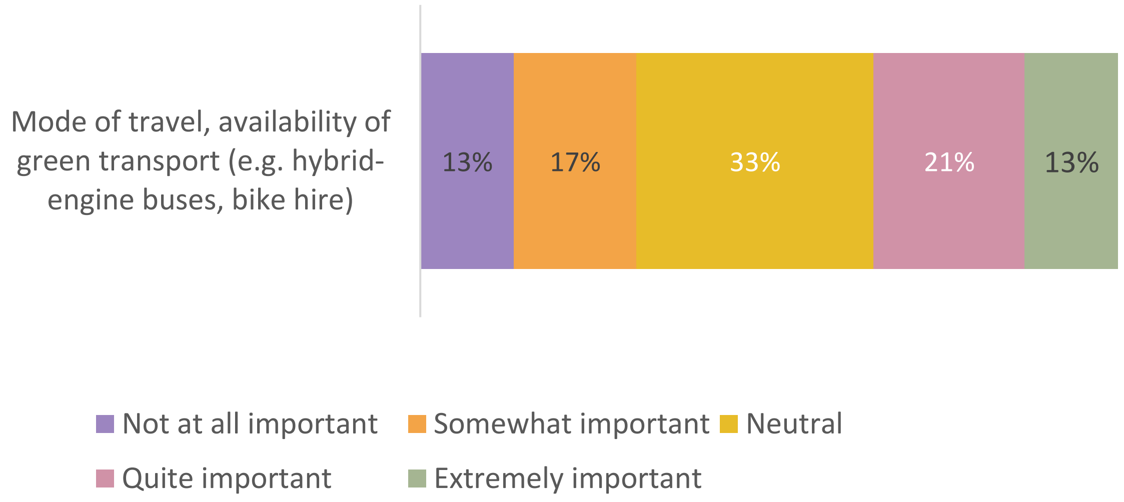
Young, urban travellers are more tuned in to green transport, though tempered by COVID concerns around public transport. Currently accessibility and ease of travelling are perhaps still higher priorities for the majority of travellers.

Public transport usage has declined for over half of people. Some of this will be connected to commuting and/or everyday travel.



Green transport is considered important by a third of people:

- 38% of those under 55 years saying it is important compared to 27% of those 55 years and over
- 42% of those who visit with children
- 40% of people from London
- It is also typically higher among people of non-white ethnicity



Q31 When you are visiting somewhere in England on a short break or holiday, how important is it to you that the business or attraction is demonstrating these sustainability measures? ? Base: All 2001

Q28 How much do you agree or disagree with each of the following statements that people have made about changes to their holiday behaviours in England as a result of the COVID pandemic? Base: All 2001

Transport and Journey Times

The ease of the journey is more important than the duration. Journey times are not specially a concern or worry, but are factored in to the holiday decision-making process.

The qualitative research had a mix of people travelling by car and public transport users.

The journey time is noted in the very early planning stages, often in the context of the length of trip: The more nights away that are planned, the further people are prepared to travel; typically 3 hours seems to be the maximum for long weekends.

Longer journeys require some planning, with stop-off points either for food, toilets etc. or at a tourism destination to make the journey part of the holiday.

> the deciding factor is whereabouts in Kent because we went to Margate and stayed at Margate in the hotel there for one night. We went up the motorway because it's north. If we were going to Folkestone then we would go south because even though it might be quicker to go on motorway, it's more pleasant and doesn't take that much longer
>
> Family with younger children

> We wouldn't go somewhere just because there's a decent motorway to get there but it's a bonus if we choose to go somewhere and we can get there quite easily
>
> Family with older children

> We'd go somewhere no more than four of five hours including an hour break because changing and giving lunch. Five hours including up to an hour break. We wouldn't normally go longer than that and have a second break. That way, what we then do is that one would drive for two hours, the other will then drive for the second two hours after the break.
>
> We much prefer going somewhere that we can just get to in one hit without a break, about two, two and a half hours.
>
> Family with disabilities

There is a mixed view of public transport links to Kent

> now you can go all the way from London to Canterbury whereas before you had to change at Ashford International, so. Yeah, the train lines are improving
>
> Couple no children

> we would never get public transport to Kent. The connections aren't there. You've got to go up to London and down
>
> Family with disabilities (South Coast)



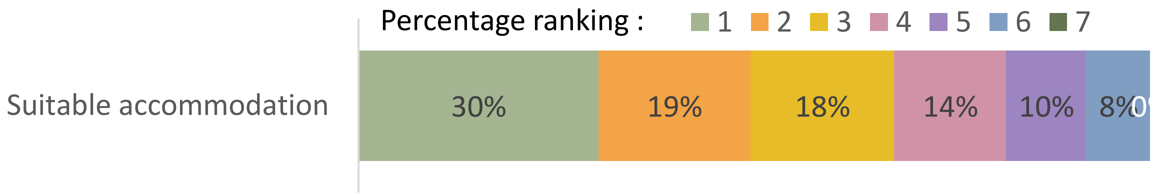
Accommodation



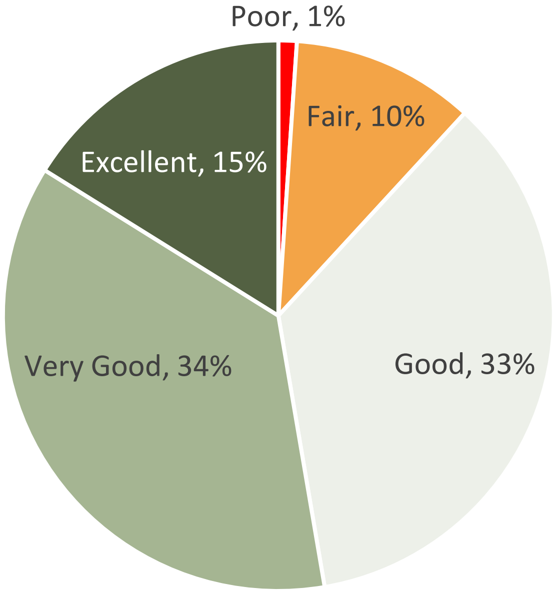
Accommodation

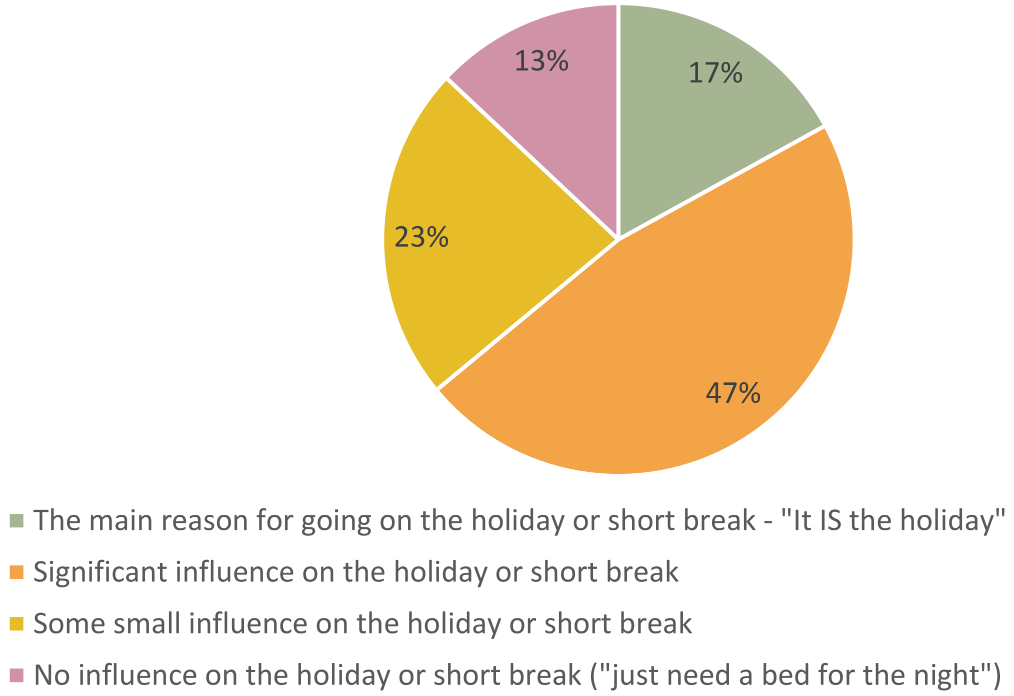
Kent has a good reputation for accommodation quality and is therefore a strength to actively promote, given its influence on the holiday/short break choice.

Accommodation is a vital element of domestic overnight trips, with almost a third of people saying it is the first consideration in deciding where to go in England. This is then reflected in the proportion of people saying accommodation is the main reason or has significant influence over the holiday choice. Importance is higher among those choosing luxury accommodation or renting a cottage/apartment.



The quality of accommodation options





Q24 How important was your accommodation type on your last visit/holiday in the Kent? Base: 1470 past visitors to Kent
Q47 How important would your accommodation type be on a future visit/holiday to Kent? Base: 1989 will consider Kent in future
Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes? Base: All 2001

Q41 Below are a number of items that might impact your decision to take a holiday in Kent. Please put them in the order you would consider them, with the aspect you would decide on first at the top of the list.

Accommodation Research and Selection

Travellers use a mix of accommodation provider information, reviews and social media to make their decision. That decision is often a combination of emotional and rational factors.

I think I'd probably googled accommodation, but hadn't booked anything. And then actually, a friend posted some pictures on Facebook, and they had stayed in these fishermen's huts. and then she sent me the link for the fishermen's huts

Family with older children

we saw the glamping tents up there, and I just thought, actually, that was like…it was a bit of a treat, it was something different for them… you could walk out the glamping and overlook the animals. So, it was really nice, but it's the sort of thing that you wouldn't do regularly, I don't think.

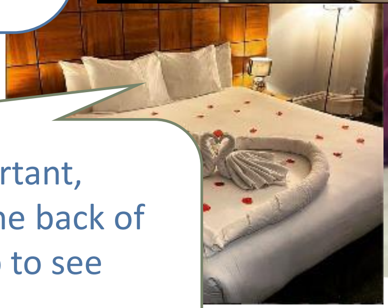
Family with older children

it's cost effectiveness for us really. So, it was a case of looking through the caravan options in the general South area… it wasn't a case of 'We'll go to Kent,' it was a case of 'Where can we go that has a pool, has the seaside,' and then the reason we ended up choosing where we did was because we knew that we had the train option if the weather was bad and stuff

Family with young children

I saw the photos on Booking.com. I thought, 'wow, that looks great!' And then I would want to – before spending more – I would want to go and research on their website. I do sometimes use Airbnb as well, but I like staying in hotels

Couple, no children



Obviously, the location is very often important, sometimes with Airbnb's they can be in the back of beyond, so yeah, I always look at the map to see how close it is to the main event

Family, young children

usually I go for the one with the most impressive picture and then I look through the gallery. …I make decisions based on my feelings so if I'm looking and I'm feeling excited then I'll look at the price second. If it, if it's lighting me up and I'm feeling, 'ooh, I'd like to be there,' then that will prompt me to make my decision

Couple, no children

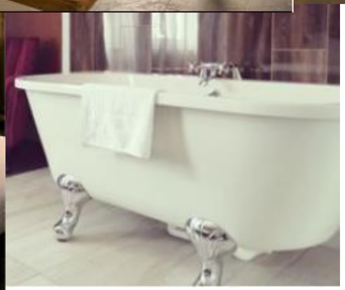
The Importance of Accommodation

For most travellers accommodation is much more than 'just a bed for the night' and therefore plays an important part in the holiday planning, with accommodation facilities, location and price all influencing the decision.

as a family we do a yearly breakaway, a girls weekend and we went to a really nice hotel in the centre of Canterbury and there was 14 of us.
Adult Group

Once we've got an idea of a couple of locations, very broad locations, then I'll start looking, and price for us is normally one of the biggest factors. I just look at which area we can get the best value for money in basically, in terms of the type of accommodation we're looking for
Family with young children

I do like to have the option to eat at the hotel just cause, for me, a big part of staying at the hotel is having a lie-in, it's relaxing, it's having a bath in the afternoon, so I want to have the option to just have a totally lazy day where you just go downstairs, can eat then [laughs] go back up and watch telly
Couple, no children



I also like to look at whether there is any additional kind of amenities. Or facilities on the property, so off street parking is a big one for us, if it doesn't have parking, we're pretty much just going to rule that out straight away because again with kids, it's just not practical. But it's a big bonus if they offer things like a high-chair, travel cot can be right there, so you don't need to use the space in the car
Couple, young children

Accessibility

The qualitative research included people who travelled with both adults and children with physical and mental disabilities. This provides some insight into the additional challenges they face when planning a trip.

20% of the population have got a disability yet 1% of the hotels provide for it, in my mind. It's probably more than that but that's how it feels.
Family with disabilities

The holy grail is an affordable hotel. Guest houses and B&Bs are no good because there's always steps and things like that. He can walk a bit but it needs to be accessible. Also, accessible toilets. We tend to stay in hotels and hotels that are more expensive. Hotels with better facilities, they're also more expensive. With parking, they're also more expensive
Family with disabilities

A lot of hotels don't have interconnecting rooms where one room has an accessible bathroom and they're interconnecting because we want separate rooms. They have family rooms but we're all in together. It's okay. We can tolerate it for one night but it's not much of a break. We have taken a carer PA with us on occasion for a couple of nights, then we have to buy another room
Family with disabilities

When we ring up, or not ring up a hotel, they rarely ask about accessibility requirements. Then when you look on the website and it's got that accessibility statement and facilities listed, you think, is this a different hotel to what's described?
Family with disabilities

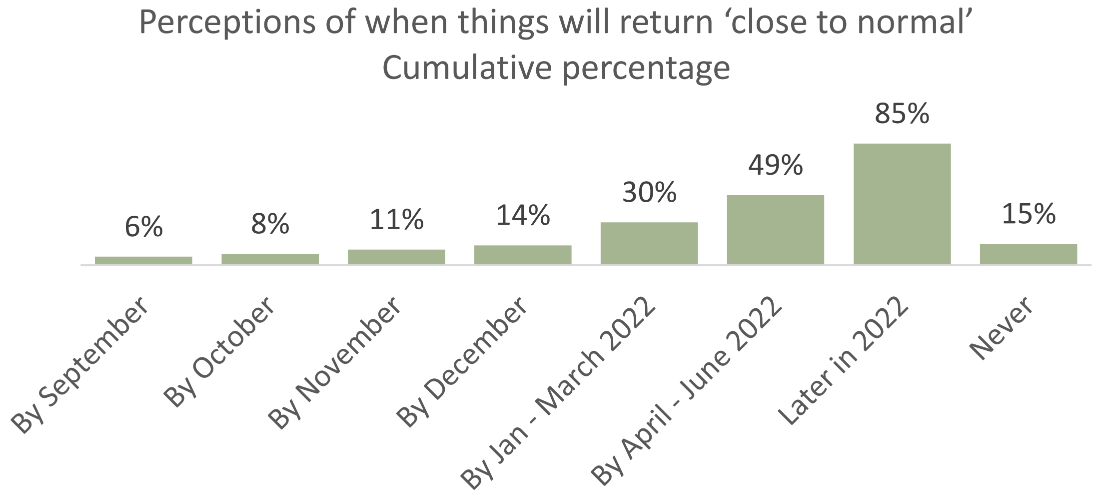
People think that disabled people are just single people because you get quite a few with a single disabled room with a disabled toilet, an accessible bathroom
Family with disabilities

VISIT KENT BUSINESS GARDEN of ENGLAND
Interreg France (Channel Manche) England EXPERIENCE European Regional Development Fund
EUROPEAN UNION European Regional Development Fund
XV Insight

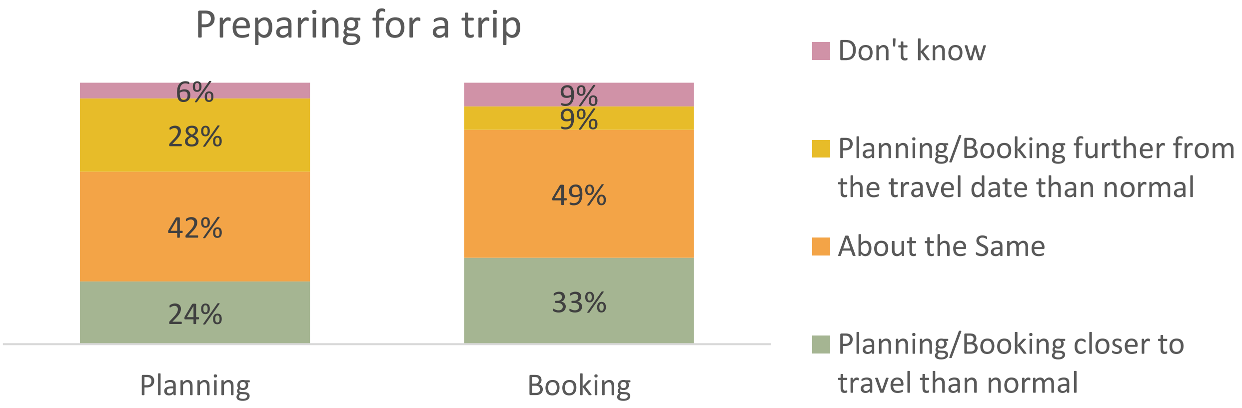
COVID Impact

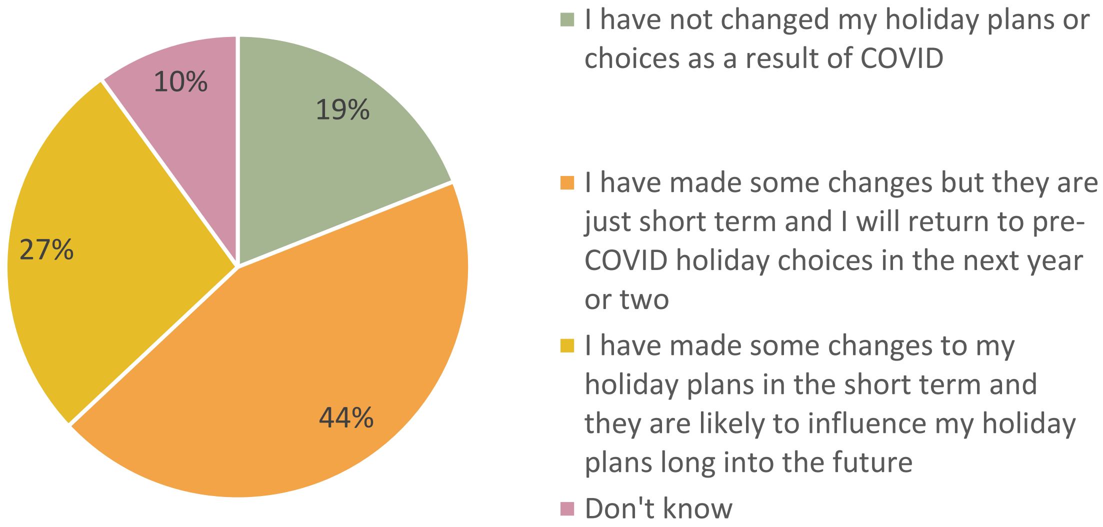
COVID Impact

- The COVID-19 pandemic of 2020/2021 has had an unprecedented impact on how we live our lives and how we spend our leisure time.
- The 'closure' of leisure and travel both in UK and internationally had a catastrophic impact on the sector.
- Recovery is under way, but it is slow:
  - 15% believe 'normal life' may never return
  - 27% have made changes to their holiday plans and expect those changes to be long term



- Whilst people are wary of booking too far in advance, leading to a third booking closer to their travel date, the planning cycle is typically starting at the same point. It is therefore important to ensure communications still hit the full planning cycle and that late bookings are accessible.





Source: COVID-19 Consumer Sentiment Tracker | VisitBritain Wave 38 Fieldwork period 23rd – 27th August 2021
Q29 Do you think any changes you have made to your leisure travel behaviour are long term/permanent changes, or do you think you will return to pre-COVID behaviours in a year or two? Base: All 2001

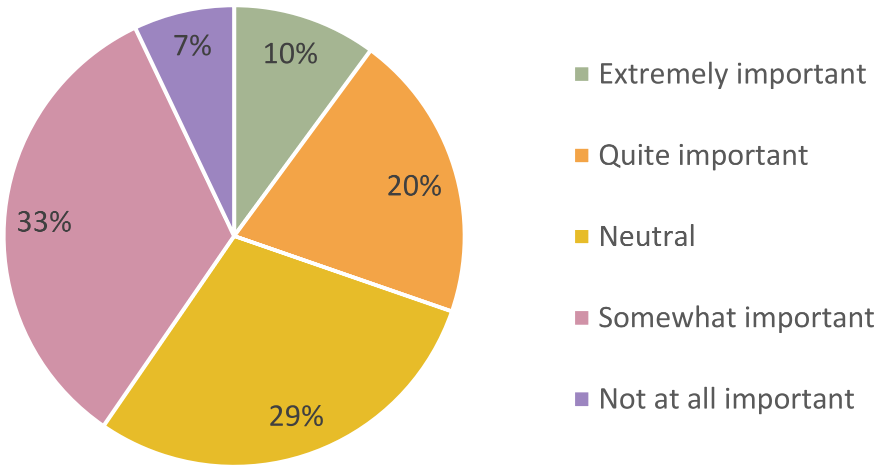


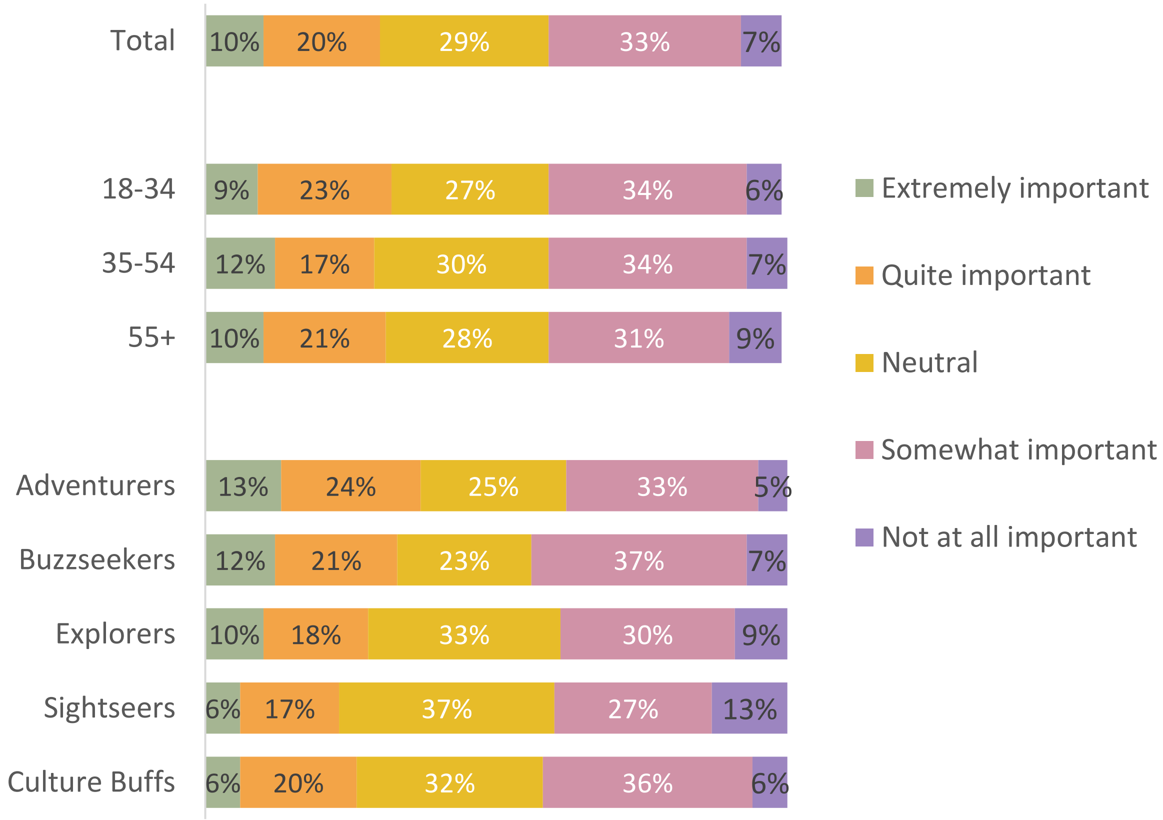
Sustainability



Sustainability

30% claim that the environment and sustainability are important in their choice of holiday destination. It is most important to the young and Adventurer segment.



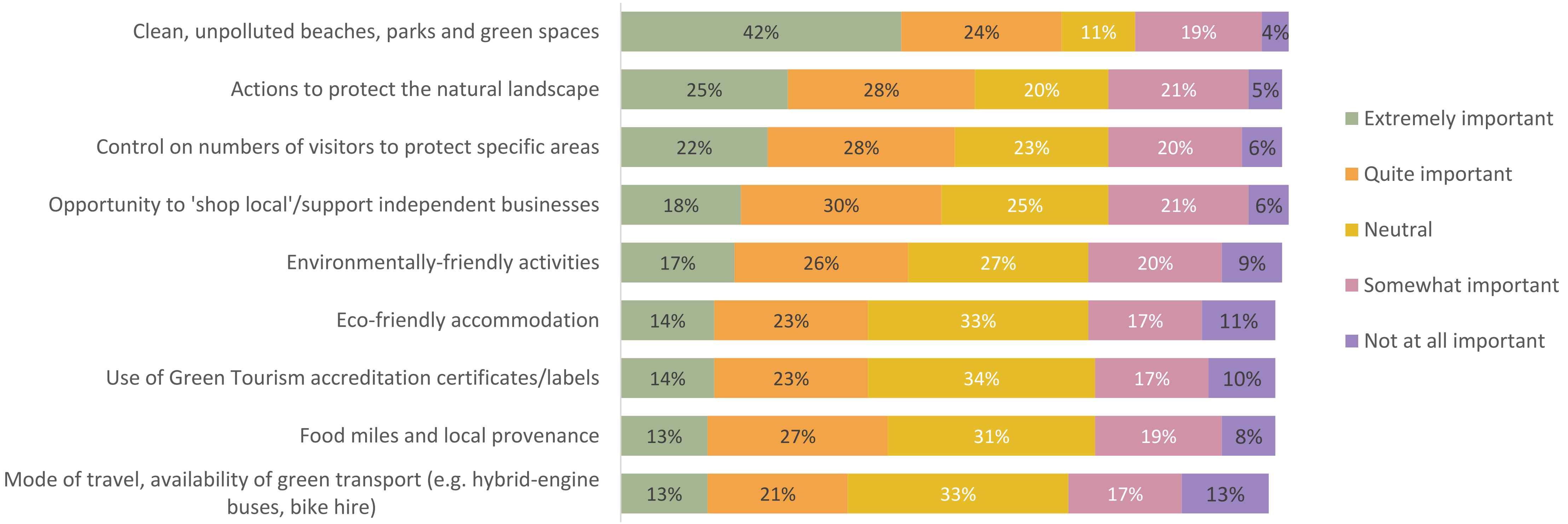


Q30 How important is the environment and sustainability in your choice of holiday(s) and destination(s)? Base: All 2001
Q31 When you are visiting somewhere in England on a short break or holiday, how important is it to you that the business or attraction is demonstrating these sustainability measures? Base: All 2001

Sustainability Measures

Aspects of most importance are those that also have personal benefit. For example clean beaches and parks are important for visitors, regardless of the environment/sustainability connection.

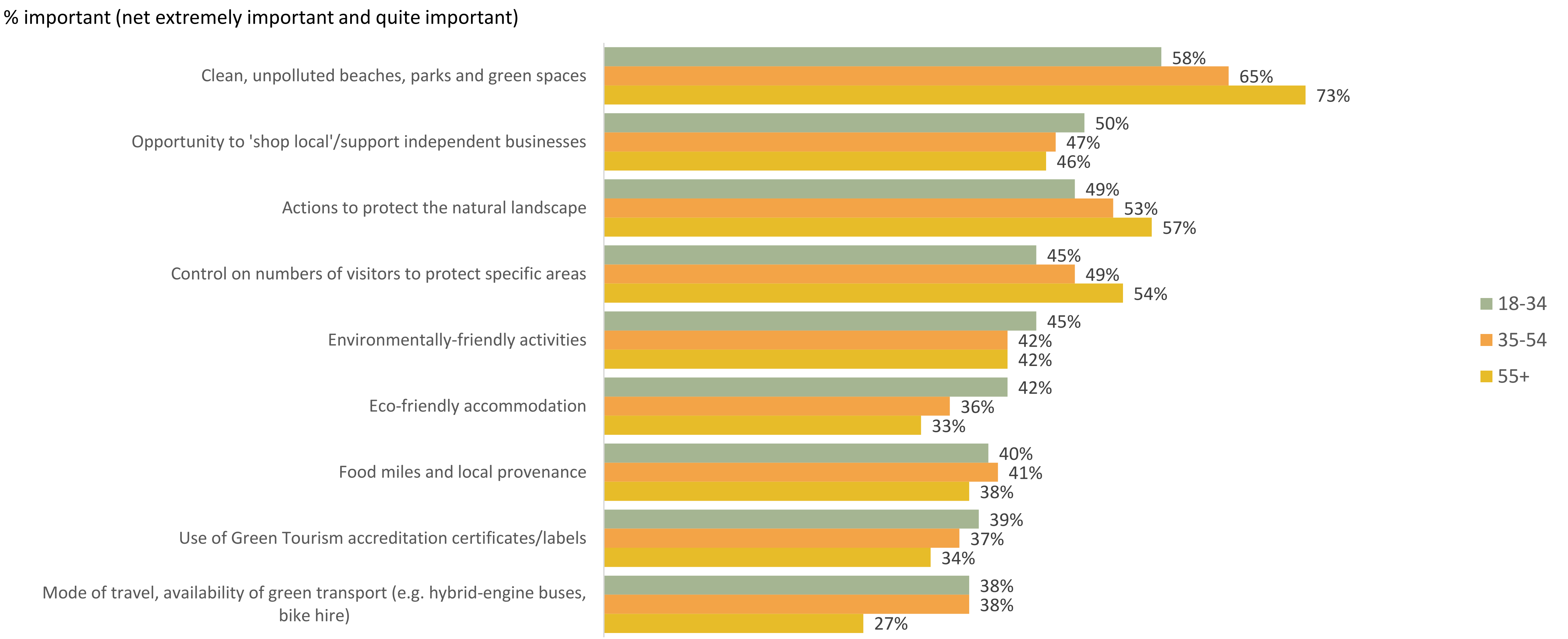
Messaging around actions being taken to make sure tourist destinations are clean and protected will resonate with visitors and align with messaging around sustainability.



Q31 When you are visiting somewhere in England on a short break or holiday, how important is it to you that the business or attraction is demonstrating these sustainability measures? Base: All 2001

Sustainability Measures

Clean beaches and parks are important for visitors of all age groups. Eco-friendly accommodation and environmentally-friendly activities are more popular among younger audiences.



Q31 When you are visiting somewhere in England on a short break or holiday, how important is it to you that the business or attraction is demonstrating these sustainability measures? Base: All 2001, 18-34 (593), 35-54 (718), 55+ (690)

Recommendations for Action

Action Areas

- Based on the learning and insight from this research we would recommend focus on the following areas:
- **Active encouragement of longer stays**, through extended hotel offers, promotion of experiences, multi-day itineraries etc.
- Consider **targeted messaging** for priority segments:
  - The **Buzzzseeker** audience, who are younger people, looking for **new and exciting**. **Authentic experiential activities** may be key to this.
  - **Culture Buffs**, an older audience who will respond to **arts & culture** and **history & heritage** messaging.
- COVID has raised still further the appeal of the outdoors and a focus on wellbeing:
  - Kent has recognised **outdoor assets** in its countryside and beaches – **strong messaging** of their presence and their **value in supporting wellbeing** should resonate with domestic tourists.
  - **Outdoor experiential activities** provide the opportunity to add ‘new and exciting’ to the natural landscape and could be built in to communication of ‘Kent outside’.
  - Linked closely to this is the need for **‘active outdoors**’, both at the Culture Buff and Buzzseeker levels of intensity.
- There are some (relatively small) areas of concern that may warrant proactive communications:
  - The **negative perceptions** of the areas of Kent impacted by the channel crossings, make them less attractive to visitors.
  - The perceptions of attractions and hospitality being **closed out of hours/off peak**, may be driven by COVID restrictions (not just in Kent), but is a perception that could grow if not addressed positively.
- **Sustainability and inclusivity** will continue to grow in importance and any offer and messaging that has these aspects built in from the start will be easier to evolve going forward. In the short term the **focus is still around the visitor benefit** (clean beaches, unspoilt landscape etc.) .

Action Areas

- Kent has a **broad and wide-reaching appeal**, through the diversity of the offer. Whilst this is an asset in terms of opportunity, it also presents a challenge to **communicate and so a clear, strong identity** for the county is therefore important to maintain.

- There is opportunity for **experiences to support the Kent brand messaging**, by focusing on those that are **authentic and as unique** as possible to the area. Not only do they support the overall proposition, but they also enable visitors to make memories and likely share their own social media content and therefore promote Kent to their networks *(see following).*

- The importance of **online presence** is greater than ever, both for the region and for individual tourism-related businesses. The need for 'honesty' is greater than ever too.
  - With prospective visitors doing ever more online research and planning (accelerated by COVID), owned channels are used in parallel with review sites and social media content. *The hotel pool shot taken from an angle that makes it look huge will soon be exposed by the Instagram posts from visitors showing the true size!*

- Whilst online is key, particularly in the planning stage, there remains **an important role for offline content in region**. Traditionally this is delivered through tourist offices and leaflets available in hotels, shops, attractions etc. There may be an opportunity for more creative, innovative offline communications that engage and inspire visitors. This may be particularly relevant for promotion of experiential activities.

- Whilst there is an understandable skew towards visitors within a c.2 hour drive time, longer journey times are not a barrier and as **longer journeys tend to link to longer stays**, there is potential value in attracting these audiences. As ease of journey is key and car remains the primary transport mode, the main road corridors (M4, M1, M40) would appear to be good areas to target.



Deep Dive Content



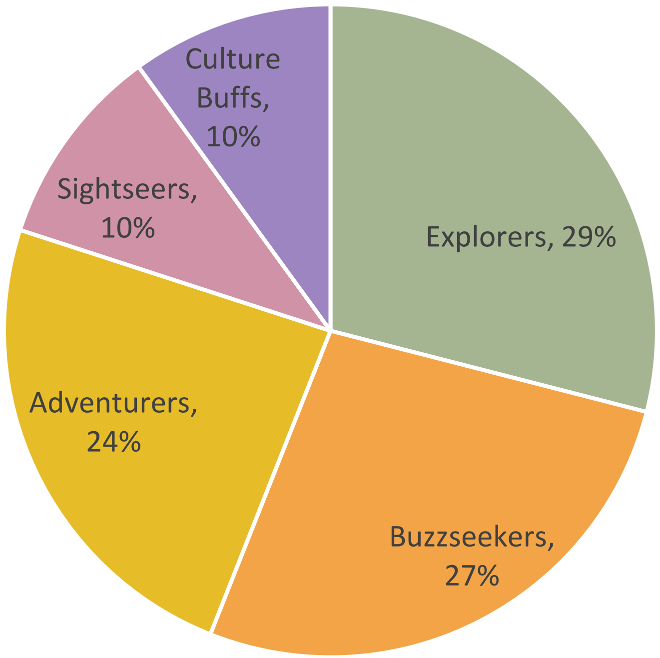


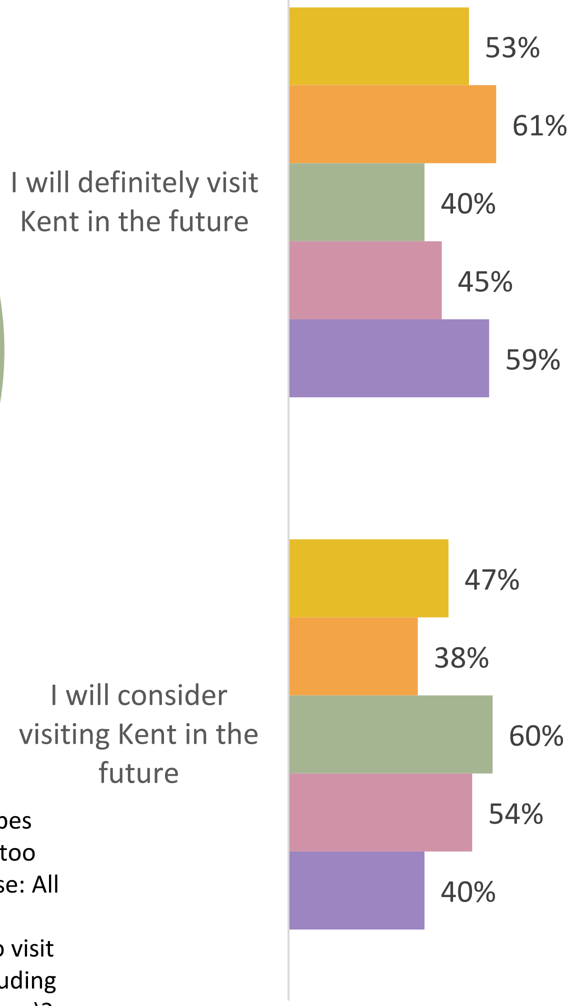
VisitBritain Segmentation – Deep Dive



Segmentation

VisitBritain segmentation, developed originally for inbound visitors, has been included within the survey. Buzzseekers and Culture Buffs are most likely to visit Kent in the future.





Q59 Select which of the two statements in each pair BEST describes you. There will be a few statements, so we ask you not to think too long about each – just read and answer as quickly as you can. Base: All respondents (2,001)
Q6 – Which of these statements best describes your likelihood to visit Kent in the future, whether for a short leisure trip or holiday including visiting friends or relatives (day trip or staying for one night or more)? Base: All respondents (2,001)

VisitBritain Segmentation

Segment	Global Size Estimate	Profile Headlines
Buzzseekers	38%	Younger, 64% aged 18 – 34yrs Free spirited and spontaneous They like to take holidays full of action and excitement
Explorers	23%	Older, 58% aged 55 years+ Content to enjoy holidays at a more relaxed pace Nature lovers enjoy the outdoors as well as must-see sites Enjoy embracing local culture
Adventurers	16%	Older, 67% aged 45 years+ Enjoy travelling off the beaten track Like spending time outdoors in nature Seek out new experiences
Sightseers	12%	Older, 57% are aged 55 years+ Like to stay within their comfort zone Prefer cities to countryside Seek sensible, well-planned trips
Culture Buffs	12%	Average age 37 years Image and brand conscious Travelling is often a status symbol Like well-known and safe destinations

Base: Visit Britain Segmentation Groups: Adventurers (486), Buzzseekers (532), Explorers (532), Sightseers (191), Culture Buffs (203)

Source: Inbound Tourism Toolkit | VisitBritain/VisitEngland

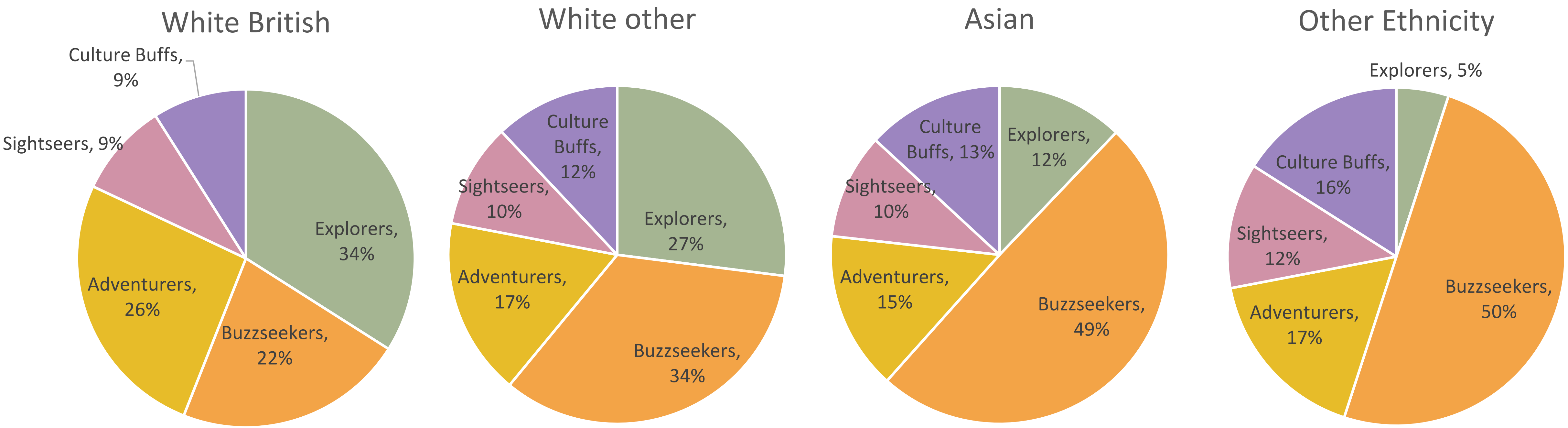
Segmentation

Buzzseekers are more prevalent among Asian and other ethnicity groups, driven at least in part by the age profile of participants.

White British has the greatest proportion of Adventurers, reflecting the older age profile of participants, but also suggesting a greater interest in exploring the outdoors amongst this ethnic group. A similar picture is seen for Explorers, again influenced by the age profile and a greater interest among white British in the local culture/environment.

Culture Buffs are a larger segment among ethnicities other than white British.

Buzzseekers account for half of all those who are Asian or of other ethnicity



Q61 What is your ethnic group? Base: White British (1,582), White Other (109), Asian (144), Other Ethnicity (140)

Segmentation - key differentiators

Buzzseekers are a young segment, often travelling with young children and seeking out luxury.

Key Segment Differentiators	Buzzseekers	Explorers	Adventurers	Sightseers	Culture Buffs
Personal Profile	63% 18 – 34 years	57% 55 years & over 39% income under £25,000	44% 35 – 54 years	48% 55 years & over	65% Female 38% 18 – 34 years 48% 35 – 54 years
Geography	25% London	30% Midlands		24% London	23% London
Attitudes	• Care about the image they portray to others • Seek out new experiences • When I travel, I enjoy exclusive or luxury experiences that others might find unaffordable	• I know the type of thing I like, and tend to stick with that • I enjoy spending time in the outdoors and in natural landscapes • I prefer holidays full of action and excitement • When I travel, I like to be comfortable but don't seek out luxury	• Seek out new experiences • I enjoy spending time in the outdoors and in natural landscapes • I prefer holidays at a slower and more relaxed pace • When I travel, I like to be comfortable but don't seek out luxury	• I know the type of thing I like, and tend to stick with that • I'm more of a city person • I prefer holidays at a slower and more relaxed pace	• Care about the image they portray to others • I know the type of thing I like, and tend to stick with that • I enjoy spending time in the outdoors and in natural landscapes • I prefer holidays at a slower and more relaxed pace
Last Trip to Kent Details	57% know Kent quite or extremely well 28% rate experience 6 or less 32% with children 0-12 years 31% arrive by train/bus 15% high-end hotel 66% accommodation is the main or significant influencer on holiday decision	64% know little or nothing about Kent 53% rate experience 7 or 8 64% with partner 78% arrive by car 8% camping/glamping	38% rate experience 9 or 10 62% with partner 77% arrive by car	45% day trip 23% travel alone 27% family & friends homes	28% with children 0-12 years

Base: Visit Britain Segmentation Groups: Adventurers (486), Buzzseekers (532), Explorers (532), Sightseers (191), Culture Buffs (203)

Segmentation - key differentiators

Explorers and Adventurers have broader travel destination preferences.

Key Segment Differentiators	Buzzseekers	Explorers	Adventurers	Sightseers	Culture Buffs
Travel Preferences	53% City or large town	77% Traditional coastal/seaside town 35% Mountains or hills 63% Rural coastline 69% Countryside or village	78% Traditional coastal/seaside town 45% 35% Mountains or hills 64% Rural coastline 71% Countryside or village	63% City or large town	
	55% dog friendly important 79% Opportunities for cultural activities 70% shopping important 70% events or festivals important		75% Opportunities for cultural activities		50% dog friendly important 67% shopping important
Kent Perceptions	50% really inspired by Exciting & Unexpected 47% really inspired by Active & Outdoors 43% really inspired by Food & Drink 41% really inspired by Wellbeing		48% really inspired by Active & Outdoors 41% really inspired by Food & Drink		
Barriers to longer future stay in Kent	15% visit en route to/from Europe 16% not sure they will find suitable accommodation 22% part of a longer holiday			39% wouldn't want to stay longer	39% wouldn't want to stay longer 18% not sure they will find suitable accommodation

Base: Visit Britain Segmentation Groups: Adventurers (486), Buzzseekers (532), Explorers (532), Sightseers (191), Culture Buffs (203)



Visit and Visitor Profile – Deep Dive

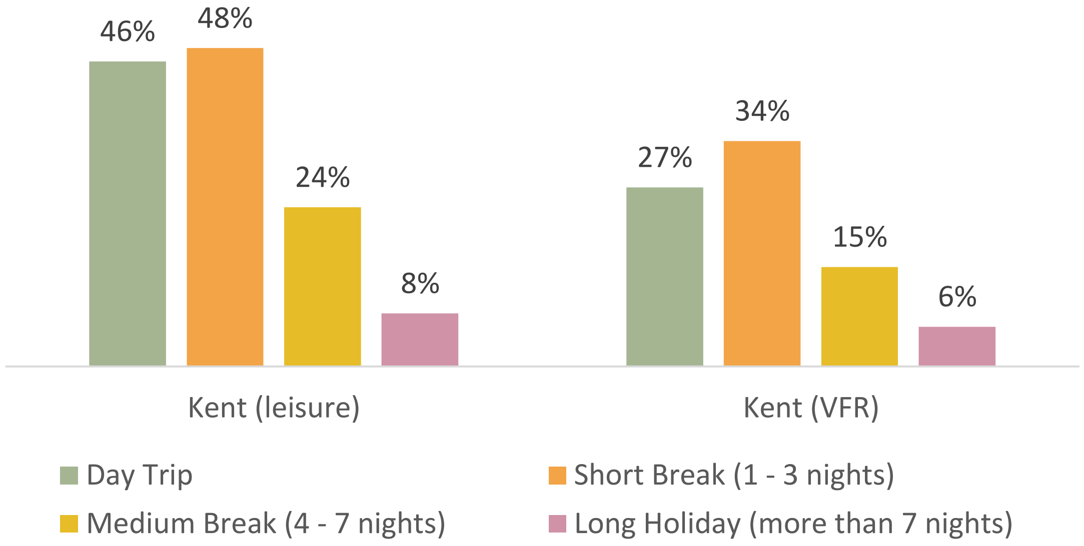


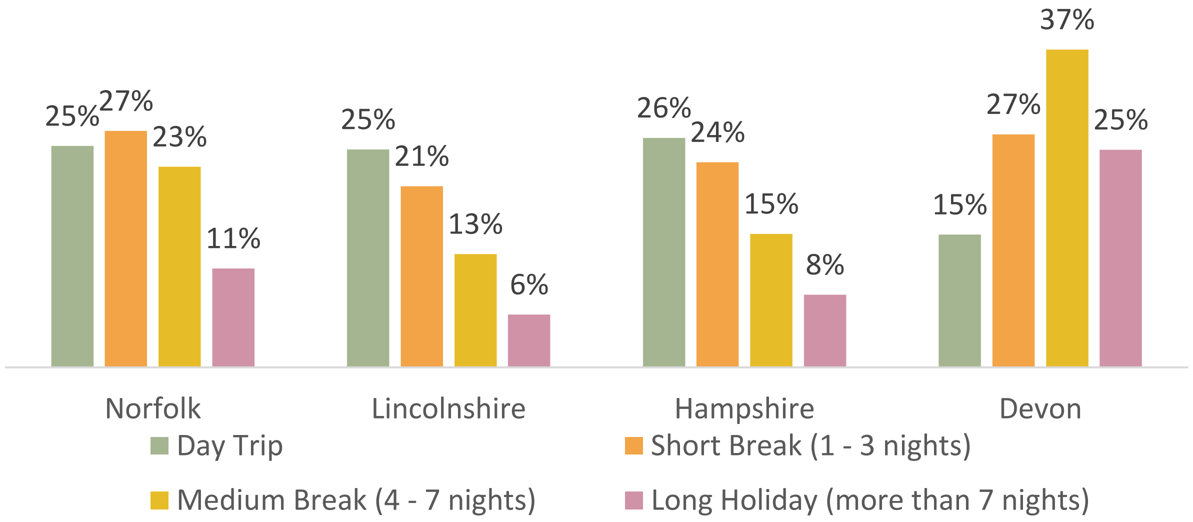
Length of Trip Taken

Kent appears to over-index on day trips, as does Lincolnshire. Devon attracts longer-staying visitors.

Both leisure and VFR visitors to Kent typically either visit for a day or a short break.

A similar pattern is seen for Norfolk, Lincolnshire and Hampshire, while Devon is a more recognised holiday destination and so has a much higher proportion.





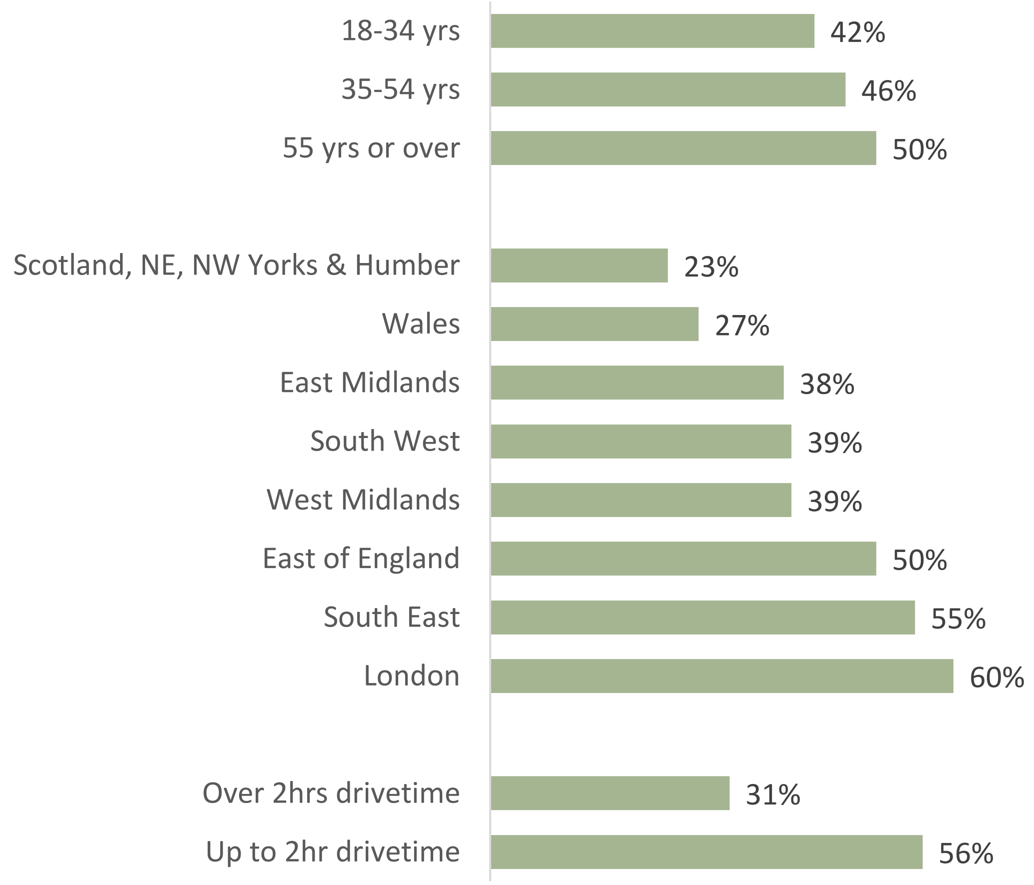
Q10 What type of visits have you made to Kent in the past? Base: All who have visited Kent (1,470)
Q14 How would you describe your last/latest leisure visit to Kent? Base: All who have visited Kent (1,470)
Q16 Have you ever visited the following places in England for a leisure trip or holiday? Base: All respondents (2,001)

Note: Kent data not directly comparable as sample skewed to geography accessible to Kent and screeners applied based on past/future visits

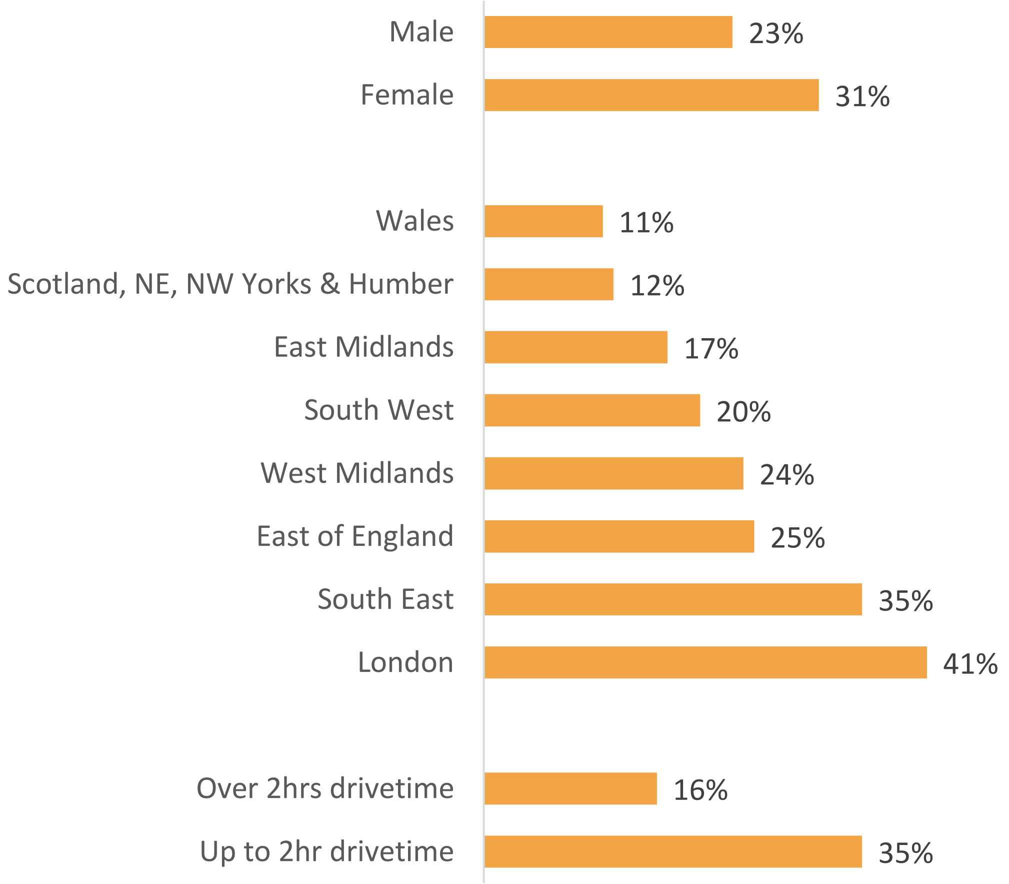
Profile of day trippers

As would be expected, day trippers tend to be local, whether visiting for leisure or visiting friends and relatives.

Day trippers to Kent for **leisure** were more likely to be older and live in London, the SE or East.



Day trippers to Kent that were **visiting friends or relatives** were more likely to be female and live within a two-hour drivetime of Kent.

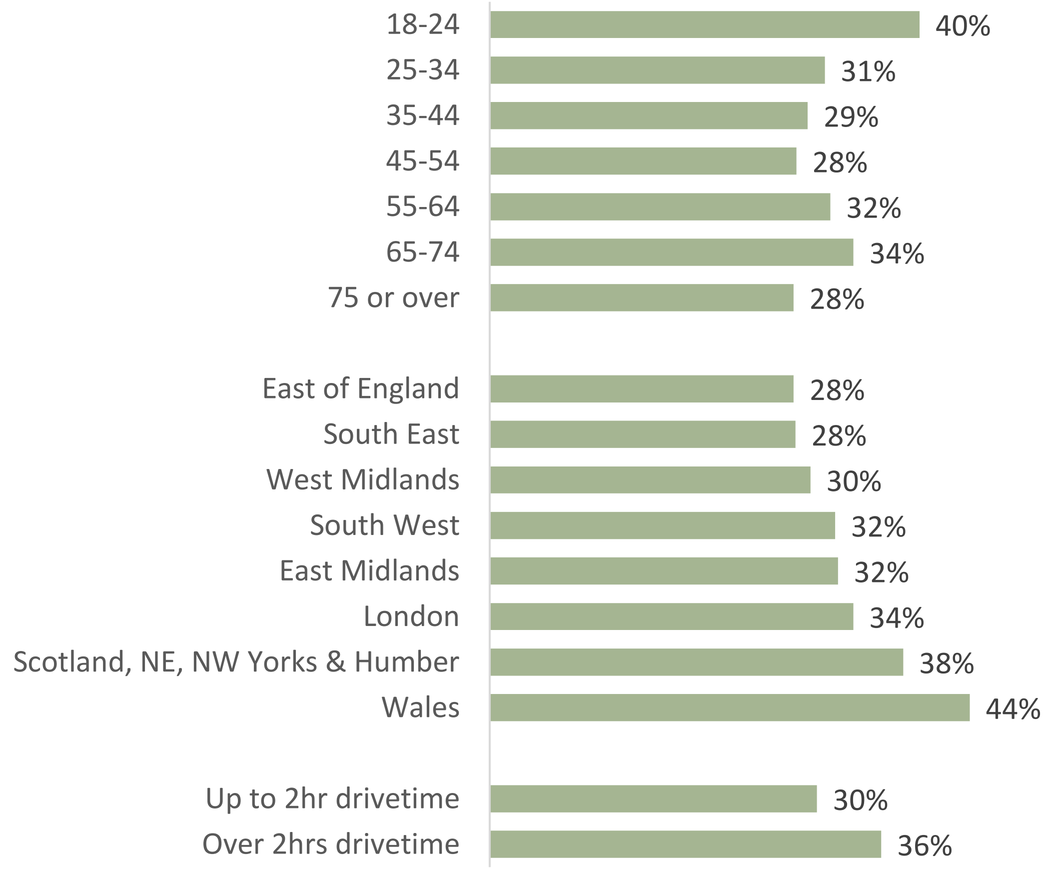


Q10 What type of visits have you made to Kent in the past? Base: All who have visited Kent (1,470)

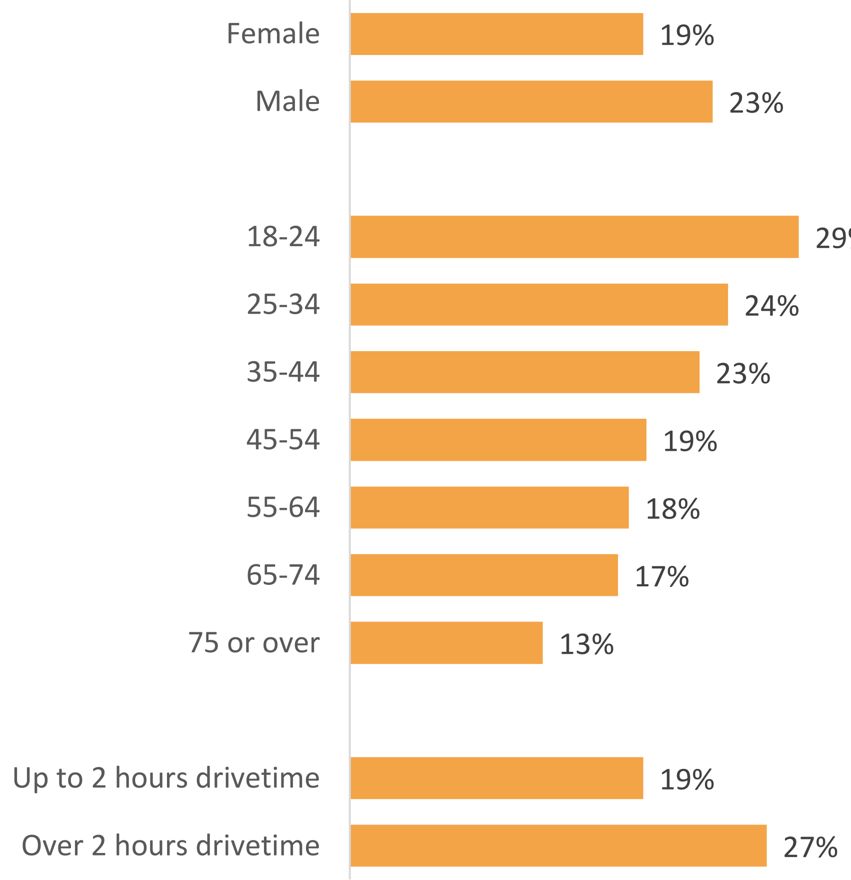
Profile of longer stays (4+ nights)

Those who stay longer in Kent are more likely to be younger (across both leisure and VFR) and typically come from further away.

Those who visited Kent for longer **leisure** breaks were more likely to be younger and live over 2 hours away.



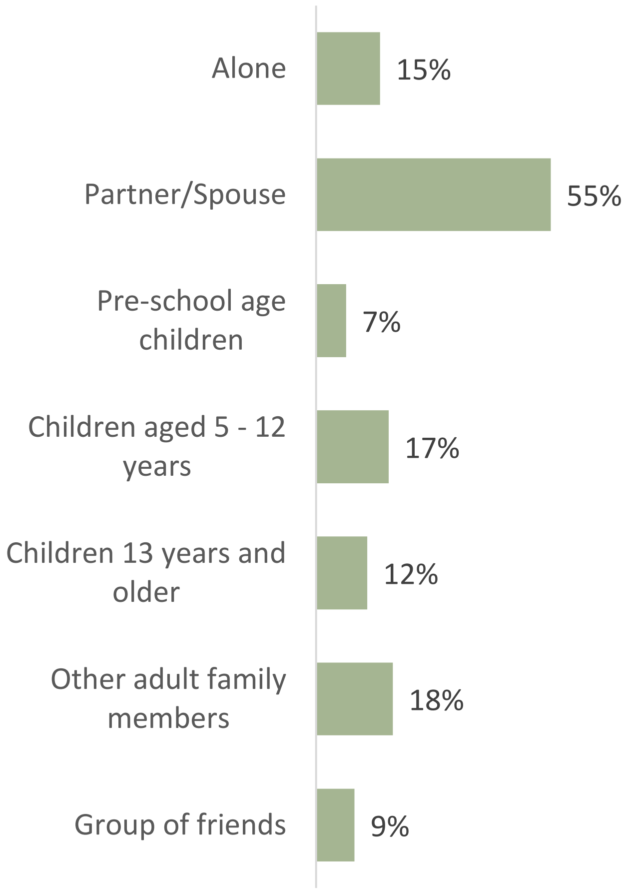
People that were **visiting friends or relatives** for 4+ days were more likely to be male, younger and live over two hour drivetime of Kent.

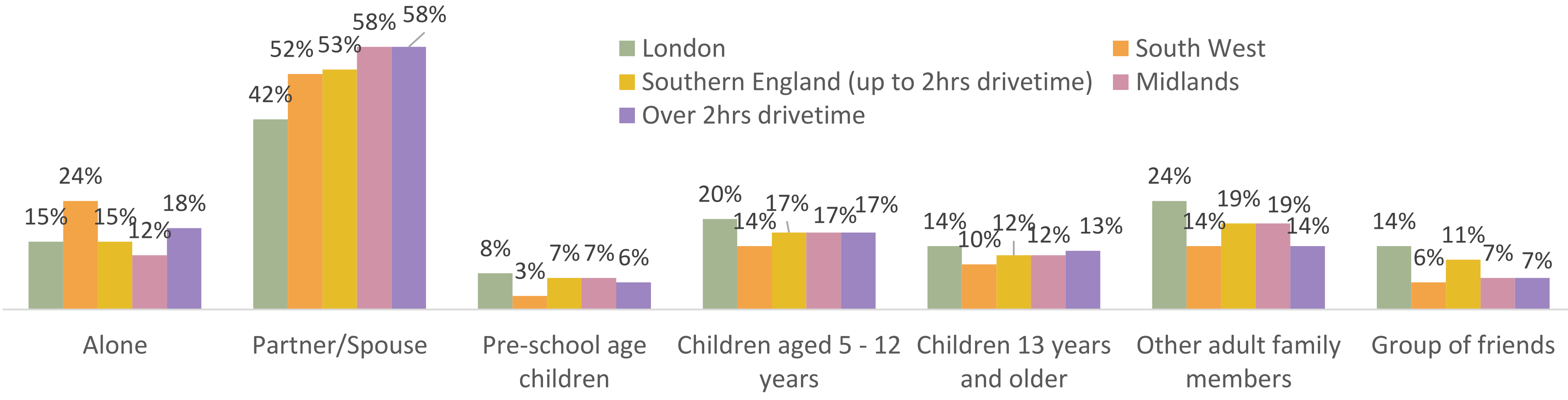


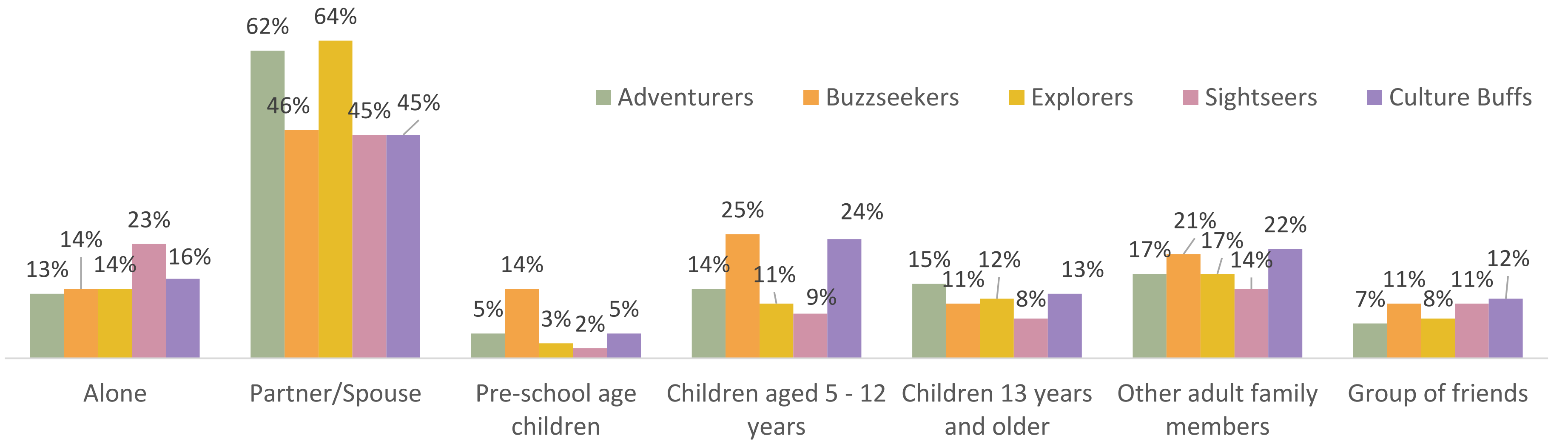
Q10 What type of visits have you made to Kent in the past? Base: All who have visited Kent (1,470)

Visitor Group Composition

Over half of visitors come with their partner/spouse, rising to almost two-thirds of Adventurers and Explorers.
Culture Buffs and Buzzseekers are most likely to visit with young children.







Q21: Thinking about your last leisure visit to Kent, who did you travel with? *Tick all that apply*
Base: Total (1470), Alone (217), Partner (809), Pre-school children (100), Children 5-12 years (248), Children over 12 years (182), Other adult family (267), Other friends (136)

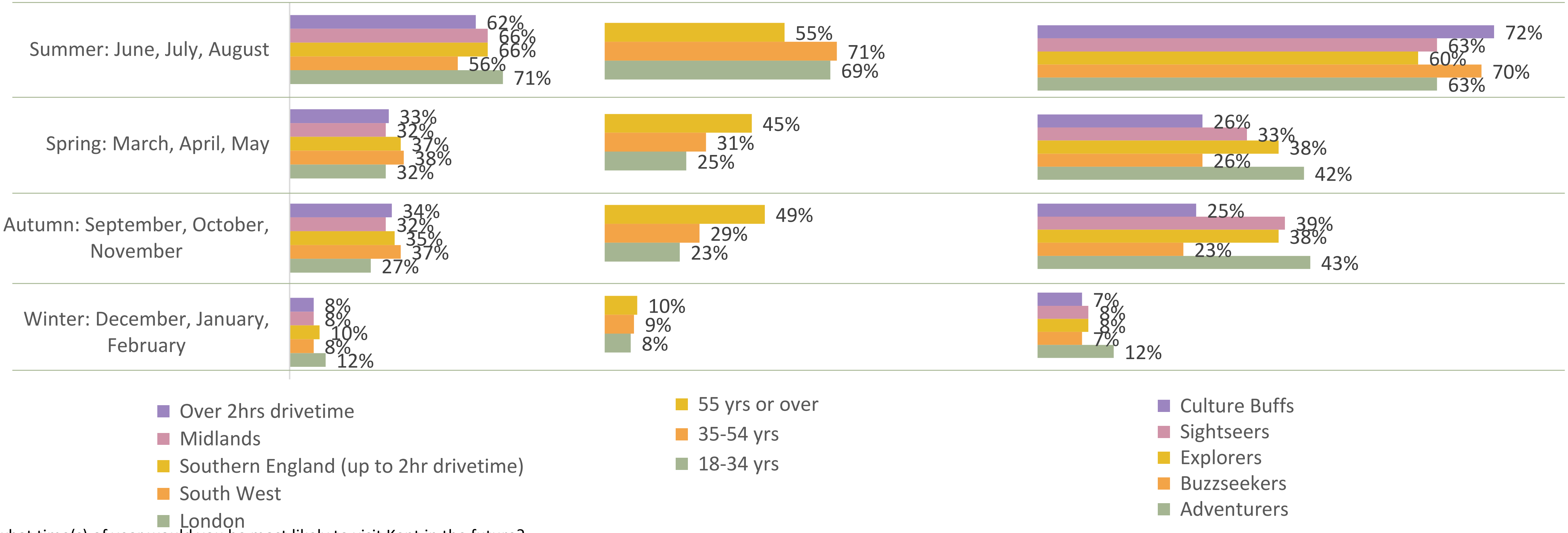
Seasonality of Future Visits

Potential visitors from the South West are a strong opportunity for the shoulder seasons, primarily because it is quieter than peak season, but also the cheaper prices. Older people and those visiting in couples or adult groups are good targets for the shoulder seasons.

Summer visitors are typically more local and particularly from London, though London visitors also come in Winter (family visits at Christmas?). Visitors from the South West are most likely to come in the shoulder season.

Summer visitors are more likely among the younger and middle age groups and those with children.

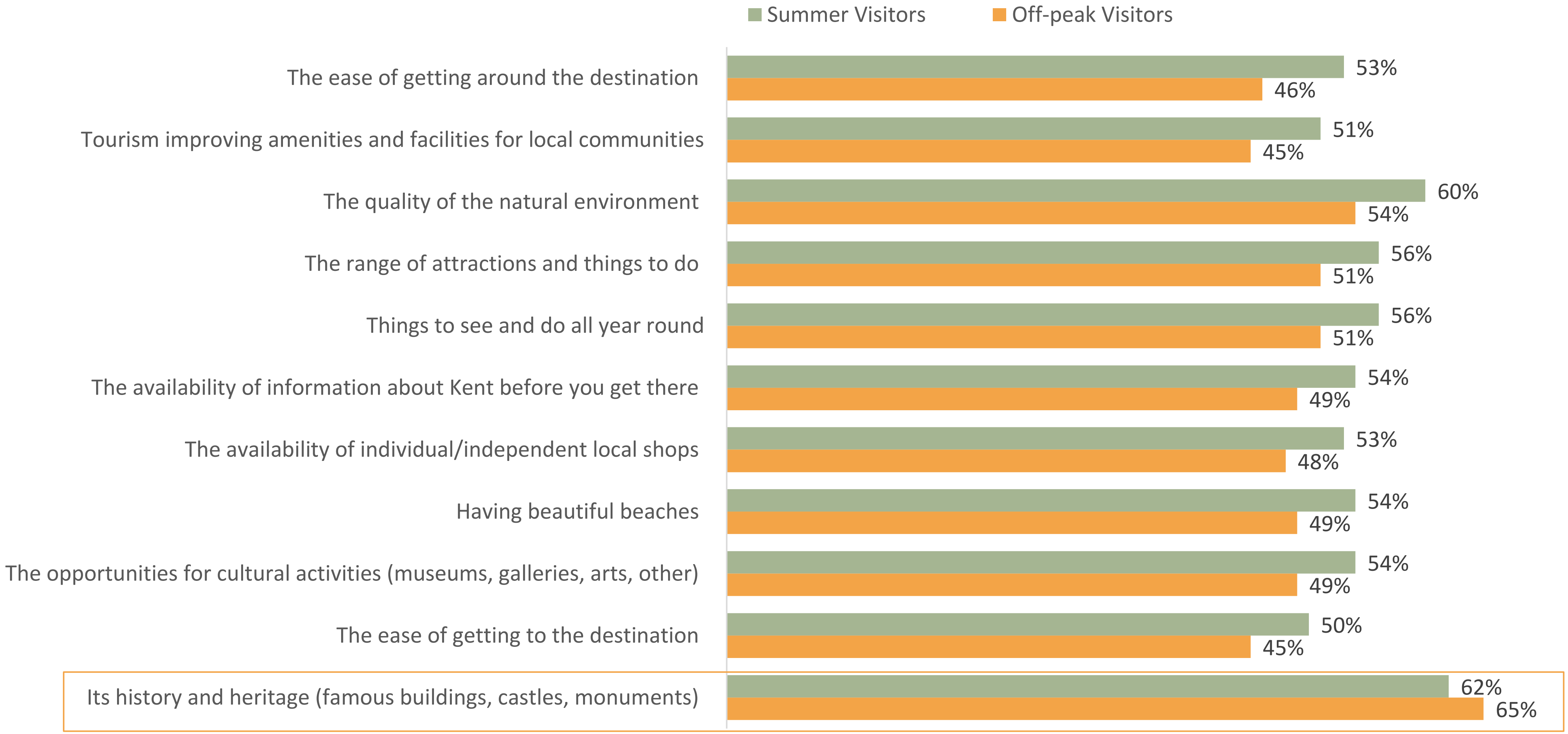
Adventurers, as an older segment are more interested in off-peak visits, as are Explorers. Buzzseekers and Culture Buffs skew towards summer peak season.



Q48 At what time(s) of year would you be most likely to visit Kent in the future?

Summer vs Off-Peak visitors

Summer visitors are a little more positive about Kent. The only attribute that is scored higher by off-peak visitors is ‘history and heritage’.



Note: chart shows those attributes where the difference between the views of summer vs Off-peak visitors are the largest

Summer vs Off-Peak Visitors

There is not as much difference between those who visit in the summer and those who visit in off-peak seasons as might be expected, because there is considerable overlap of people.

- Individual visitors/visitor groups don't just come in one season.
  - There is a skew towards summer:
    - Those who next intend to visit Kent in the summer, typically last visited in the summer.
    - This appears to simply reflect the higher summer visitor volume rather than a divide between those who visit in the summer and those who come in off-peak seasons.
  - Almost half of those whose next visit will be off-peak, last visited in the summer and around a quarter in each shoulder season.
    - Those who last visited off-peak are equally likely to visit in Spring, Summer or Autumn.
- This overlap of people across the seasons means that the difference between visitors in summer and off-peak are generally not major. There are no significant differences in:
  - Year of last visit
  - Level of intent to visit again
  - Trip length or duration
  - Transport mode to Kent
  - Accommodation type
  - COVID impact on holiday behaviours
  - Importance of sustainability
  - Reasons for choosing Kent
  - Income, ethnicity, gender

Last visits (single answer)	Next Visit Summer	Next Visit Off-Peak
Last visit - Spring	15%	26%
Last visit – Summer	70%	46%
Last visit – Autumn	12%	21%
Last visit - Winter	3%	7%
Past visits (multiple answers)	**Next Visit Summer**	**Next Visit Off-Peak**
Past visits – Spring	36%	53%
Past visits – Summer	83%	66%
Past visits – Autumn	29%	45%
Past visits – Winter	15%	22%
Next visit (multiple answers)	**Last Visit Summer**	**Last Visit Off-Peak**
Next visit - Spring	28%	45%
Next visit - Summer	81%	48%
Next visit - Autumn	29%	43%
Next visit - Winter	8%	13%

Summer vs Off-Peak Visitors

- Summer visitors ….
  - Inspired to visit Kent by the Exciting & Unexpected and the Wellbeing imagery.
  - Say shopping opportunities (56% vs 49%) and Events/festivals (51% vs 44%) are important.
  - The variety of activities as an influencer to visit Kent (21% rank it first).
  - More likely to consider a longer break in Kent in future (28% vs 22%), with deals more likely motivate longer visits (64%). Those who wouldn’t stay longer are more likely to been on a day trip to a specific place.
  - More active online using Kent destination websites (43% vs 36% and attraction websites (38% vs 32%) to seek out information.
  - Booking as a package (30%).
  - Interest in the Ghost hunt tour experience (31%).
  - Walk or hike once in Kent (12% vs 7%).
  - Slightly younger (32% are 18-34 vs 27%).
  - More from London (23% vs 18%).
  - Slightly more Buzzseekers (31% vs 27%).

- Off-Peak visitors ….
  - A little more likely to be visiting friends and relatives (34% vs 29%) and therefore friends and family more likely to be the primary decision influencer (16%).
  - 55% visit alone/in a couple (45% of Summer visitors).
  - Greater interest in rural coastline (52% vs 45%) and say that clean unpolluted beaches are important (68% vs 63%).
  - Planning more day trips and short breaks in England in 2022 (52% vs 48%).
  - Say the ‘know well’/’have visited’ more places in Kent, in particular – Deal, Folkstone, Maidstone.
  - Social media recommendations more important in informing decision (20% vs 16%).
  - Book directly with accommodation providers and activities (60%).
  - Slightly older (38% 55yrs + vs 32%).
  - More from the South East (21% vs 16%).
  - Slightly more Explorers (29% vs 25%).

Individual Stories

Illustrative examples of individual stories from the qualitative research.

Female 25-34 yrs, Buzzseeker / Explorer, normally travels with partner, visited Kent Feb 2020, 4/5* hotels

- Organising an annual girls' weekend away for 14 of her female relatives who range from mid-20s up to 75 years old. In February 2020 they went to Canterbury and stayed in the centre of the city in a 4* hotel and had a fabulous time!
- Started planning the Canterbury trip a year to 9 months beforehand as they had 14 people to liaise with on dates and levels of expenditure. The key influence was having somewhere relatively easily accessible for everyone with good transport links.
- Booked a hotel in Canterbury so at least they had something booked and she knew she could cancel it right up to the date of travel. However, she still kept an eye out for something else and a deal came up for a better hotel in Canterbury for the same price however it also offered parking for the guests.

Female 45-54 yrs, Culture Buff/Sightseer, single mum, visited Kent pre and during COVID, mid-range hotels or rented accommodation

- Single mum with 2 daughters aged 10 and 14 years. She is a good leisure break planner and has lots of ideas of where to go next. She is restricted to holidaying in school holidays. She tends to decide where to go and her daughters get involved in planning the activities they will do. Planning ahead, she wants to have a big family holiday in 2022 before her eldest daughter's GCSE year starts.
- Doesn't like hot places or beaches, and her daughters aren't that keen on the sand and the typical beach holiday. They like city breaks and have done a number of short breaks in the UK to York and more recently Oxford.
- Googled 'glamping' and came across Port Lympne Safari in Kent. It resonated with her as she remembered seeing a report on the 'Tiger Lodge' glamping accommodation on TV and the unusual accommodation overlooking the tiger enclosure. That proved to be too expensive for her, but she found a cheaper lodge option overlooking the animals, albeit still quite pricey). It was a novelty for them all and her girls especially liked the 'secret bed in a cupboard' in their glamping lodge.

Female 45-54 yrs, Buzzseeker, married one daughter, Airbnb, UK short breaks, longer holidays abroad

- Initially while working in the area saw how pretty the coastal area around Hythe is and how unspoilt it seemed compared to other English coastal resorts she has visited.
- Colleagues there recommended Deal as a leisure break location, so booked a long weekend in summer 2019 as a fairly spontaneous trip and used AirBnB to book accommodation. They enjoyed the pier and castle.
- Leisure breaks are about being with friends and family in a beautiful location with options for things to do and places to walk.
- Doesn't necessarily book things, just has them in mind. Finds that if you are too spontaneous you spend half your time away phoning round and organising things. Equally doesn't like to be too prescriptive as weather can affect plans.

Individual Stories

Illustrative examples of individual stories from the qualitative research.

Female, 25-34 yrs, Explorer/Adventurer, from West Midlands, child with mental disability, visited Kent in 2019

- Has a relaxed attitude to the family's leisure time planning with a mix of summer holidays booked up to a year in advance (pre-pandemic behaviour) and ad hoc spontaneous day trips and overnight trips away during the rest of the year.
- Hoseasons or Haven Holidays work for them as they have the entertainment element for the children and tend to be near a beach.
- Having a clear plan and familiarity for her daughter works for them as a family for longer holidays and the key 'must have' is to be near a beach where there are enough activities and eateries.
- As a family they will travel a couple of hours for a day trip, such as a recent day trip to Longleat Safari Park which was a good 2-3 hours each way.
- Booking ahead since the pandemic hit is hard due to the uncertainty and the hike in prices that companies have made, especially during school holidays. It seems to make the cost double for less holiday.

Female, 25-34 yrs, no children, Explorer/Buzzseeker, use public transport, loves the outdoors, visited Kent in summer 2020

- Describes herself as a 'Digital Nomad' who is starting to settle down just a bit! Having been more of a traveller staying in budget accommodation and always on the move, these days her and her partner like to stay in boutique hotels that have some uniqueness/something special.
- Chose the hotel in Ely as the main attraction for the birthday break. It was a historic, Jacobean building and when she saw the photos of the interior, they "made her feel excited" so she knew it was the place to book.
- Generally she decides on the area to holiday in first and then chooses a hotel to stay in. Sometimes if she finds a particularly special hotel to stay in, that trumps whether the area is quite right, and the price can also be secondary. For special occasions she is happy to pay more for a hotel if it is distinctive and warrants it.
- The information online about a pilgrimage route wasn't great so planned her own itinerary and found hotels that worked for them, a central B&B in Canterbury, a couple of days at a special hotel outside of Canterbury, and then a hotel on the coast.




Visitor Experience
Satisfaction, Recommendation and Opinions of Kent
Deep Dive



Opinion/Expectations

The following charts plot the rank order in which the statements perform in this research and where available compared to the 2018 research. The ‘maps’ are designed to highlight where performance has changed over time and among very-recent and not-so-recent visitors.

Items in this quadrant have previously ranked highly but have been ranked lower in the most recent research and/or among more recent visitors.
It is important to review these elements and establish whether they are temporary ‘blips’ caused by the impact of COVID or whether there are underlying issues that need specific action to be taken.

Items in this quadrant are ranked top in both groups being compared (e.g. the 2018 survey and people visiting more recently).
These are core, established strengths for Kent, that can be reinforced through messaging.

Items in this quadrant are ranked bottom in both groups being compared (e.g. the 2018 survey and people visiting more recently).
They are therefore areas that Kent does not perform so well on. They may be aspects that require concerted effort over time to move people’s entrenched perceptions.
Note: Value for money will often fall in this quadrant and therefore may not be the priority to attempt to address.

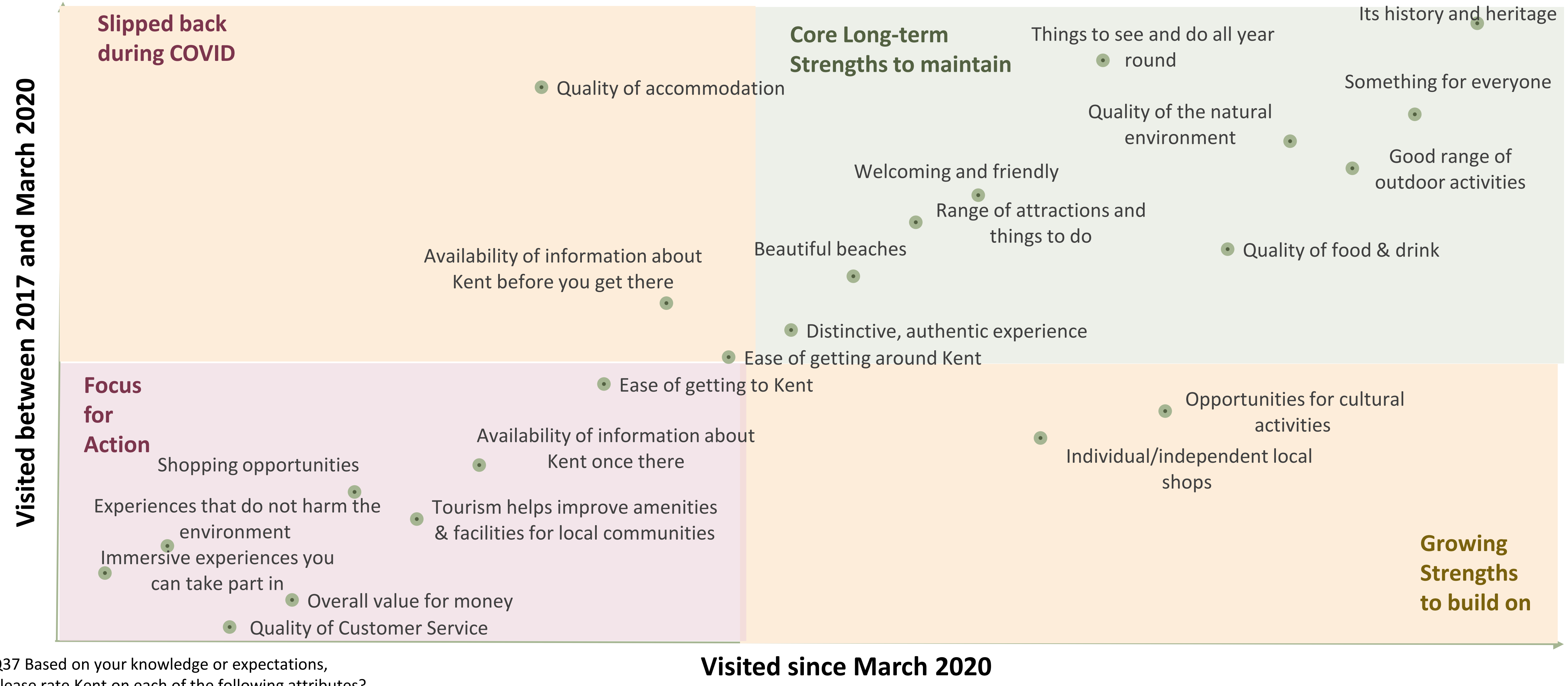
Items in this quadrant have previously ranked lower but have been ranked higher in the most recent research and/or among more recent visitors.
These attributes have improved, either in terms of delivery and/or in how they have been communicated.
They are strengths to continue to build on for the future.

Rank Order

Rank Order

Opinion/Expectations – COVID impact?

Accommodation & availability of information before the visit have slipped back among those who visited during COVID, while cultural activities and independent shops have increased.

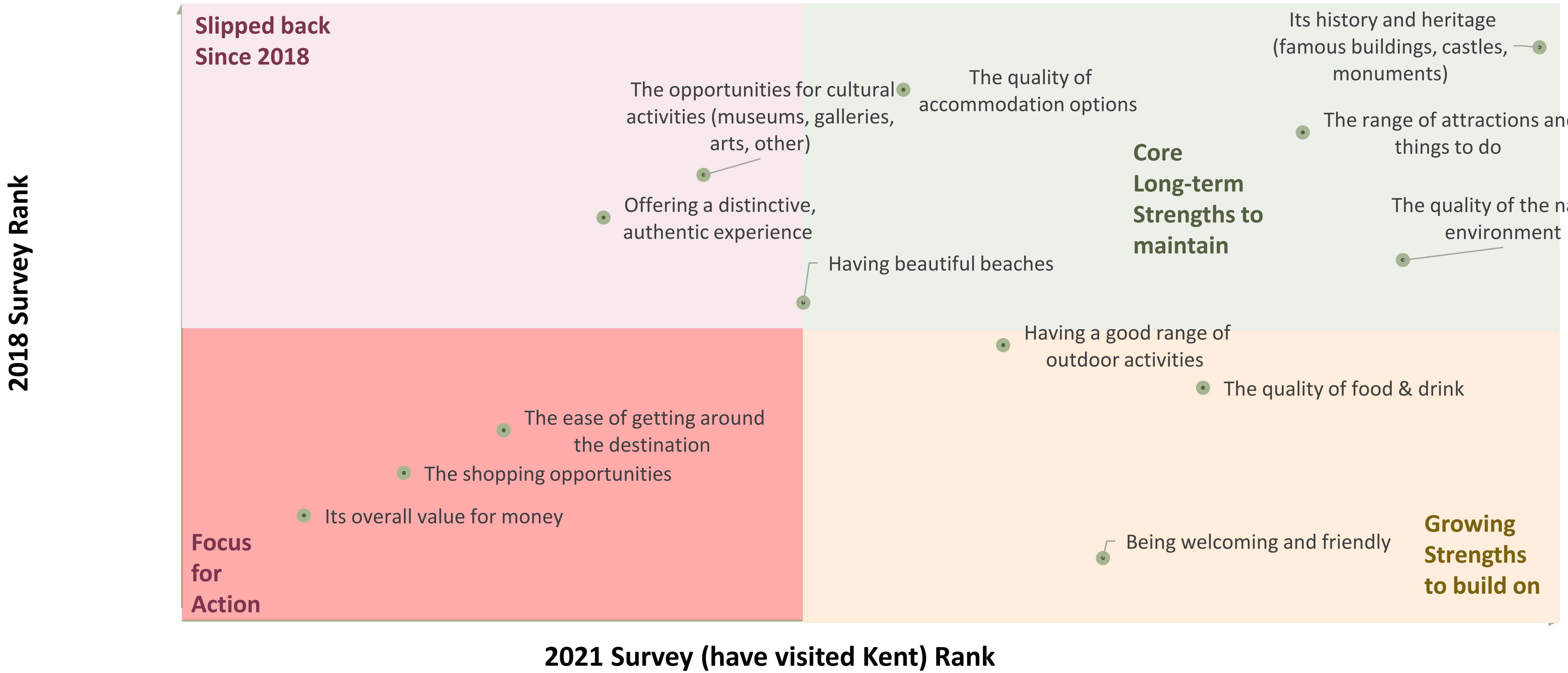


Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
Base: Visited Kent since March 2020 (382) Visited between 2017 and 2020 (580)
2018 Survey visited in last 5 years (843)

Note: Comparison is based on rank order of statements asked in both years, as absolute scores have changed

Opinion/Expectations – Comparison to 2018 Survey

Among visitors to Kent surveyed in 2021, food and drink, the welcome and outdoor activities have improved their rank from 2018.

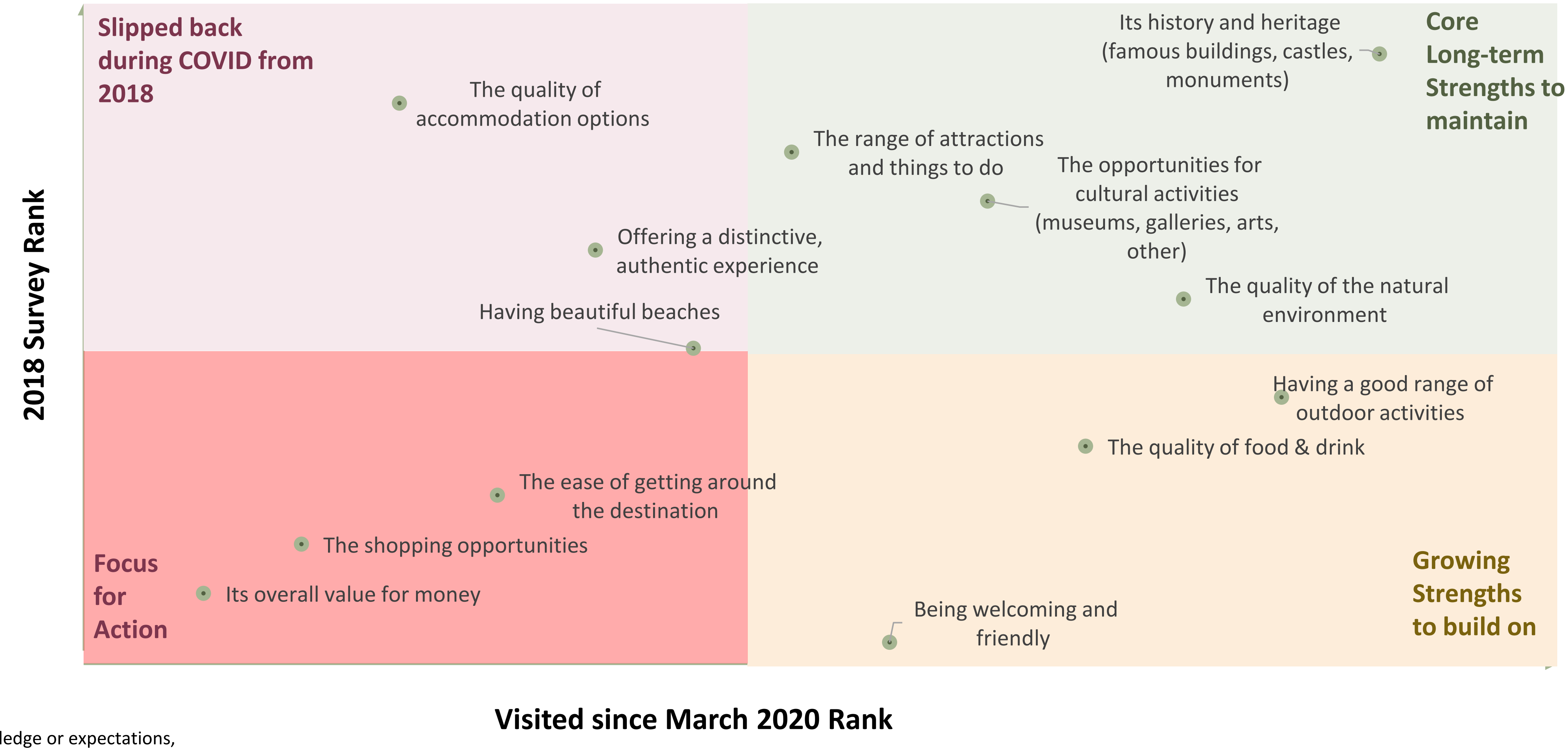


Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
Base: Visited Kent (1470)
2018 Survey visited in last 5 years (843)

Note: Comparison is based on rank order of statements asked in both years, as absolute scores have changed

Opinion/Expectations – 2018 Survey vs COVID-period visitors

Shopping and ease of getting around Kent remain long-term challenges, whilst heritage, culture and the natural environment are long-term strengths.



Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
Base: Visited Kent since March 2020 (382)
2018 Survey visited in last 5 years (843)

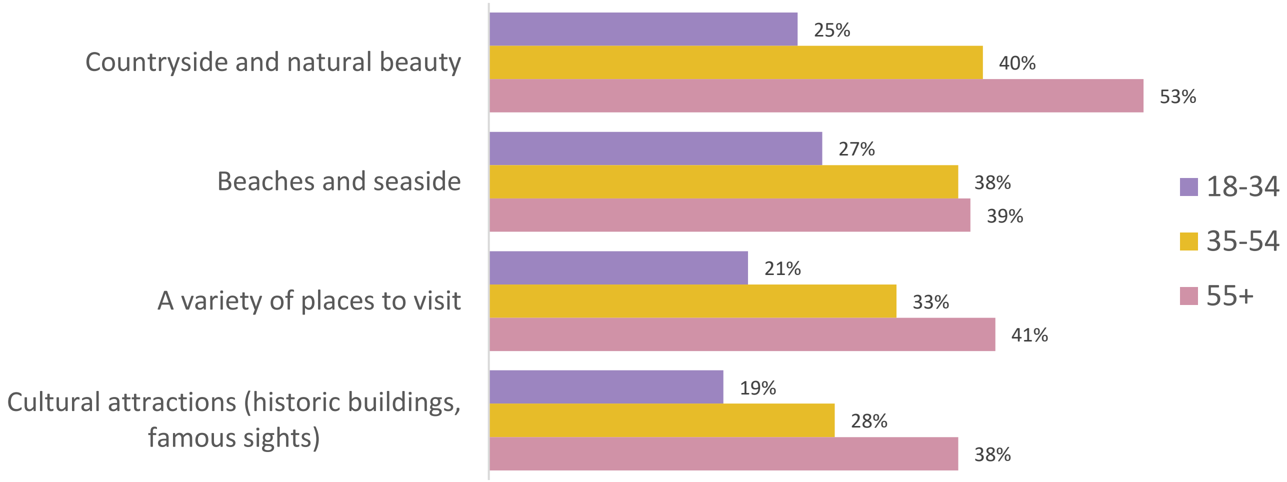
Note: Comparison is based on rank order of statements asked in both years, as absolute scores have changed

Main Reasons to visit Kent - by age

Younger audiences generally less engaged at this question – do they know what Kent has to offer?

Among the main reasons given to visit Kent, older people are much more likely to be motivated by the countryside than younger people.

The beach is a strong pull for those aged 35 years and over. This is reflected in the rank order of selection where beaches top the list for young people and variety of places is ahead of beaches for those 55 years and over.



TOP 5 reasons to travel to Kent	18-34 yrs
Beaches and seaside	27%
Countryside and natural beauty	25%
A variety of places to visit	21%
Cultural attractions (historic buildings, famous sights)	19%
A mix of old and new	18%

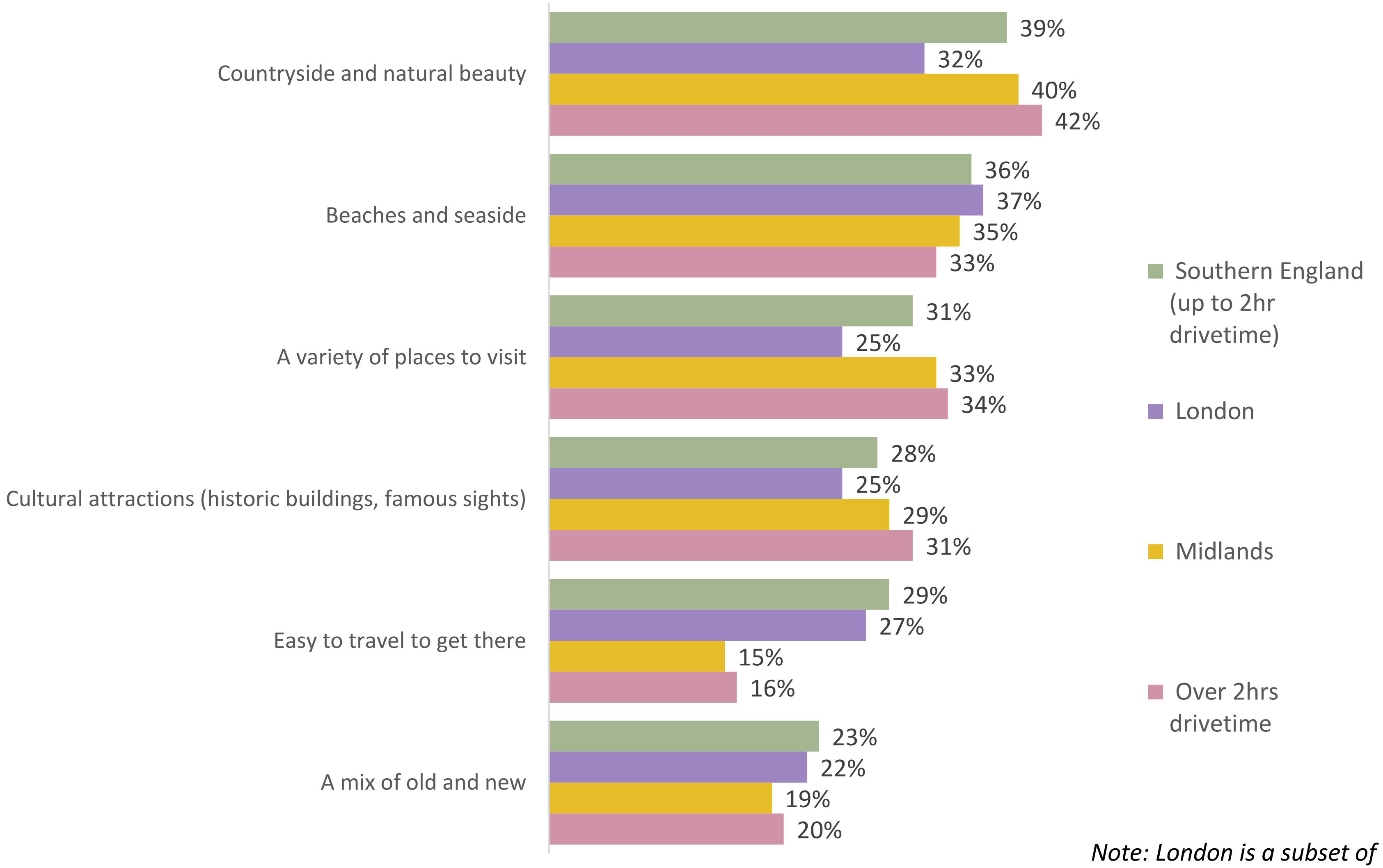
TOP 5 reasons to travel to Kent	35-54 yrs
Countryside and natural beauty	40%
Beaches and seaside	38%
A variety of places to visit	33%
Cultural attractions (historic buildings, famous sights)	28%
Easy to travel to get there	24%

TOP 5 reasons to travel to Kent	55+
Countryside and natural beauty	53%
A variety of places to visit	41%
Beaches and seaside	39%
Cultural attractions (historic buildings, famous sights)	38%
Easy to travel to get there	25%

Q51 And which of the following are reasons why you would choose to visit Kent? Base: Will definitely visit / consider visiting Kent in the future (1,989)

Main Reasons to visit Kent - by geography

Ease of access is a passive driver for those from the South East, while those from further afield are motivated more by the assets and attractions within Kent.



Visitors from London have a more one-dimensional view of Kent:

- Beaches and seaside
- Countryside and natural beauty

Supported by convenience/easy to get to.

So a simple choice, perhaps requiring little thought or planning?

Variety of places to visit plays a stronger role for potential visitors from the South West (with beaches less so, reflecting the ease of access to beaches more locally).

For those further away the countryside, variety and cultural attractions are all important. These aspects are also important for those from the Midlands, though beaches play a stronger part here too (given the lack of easy access to the seaside from the Midlands area).

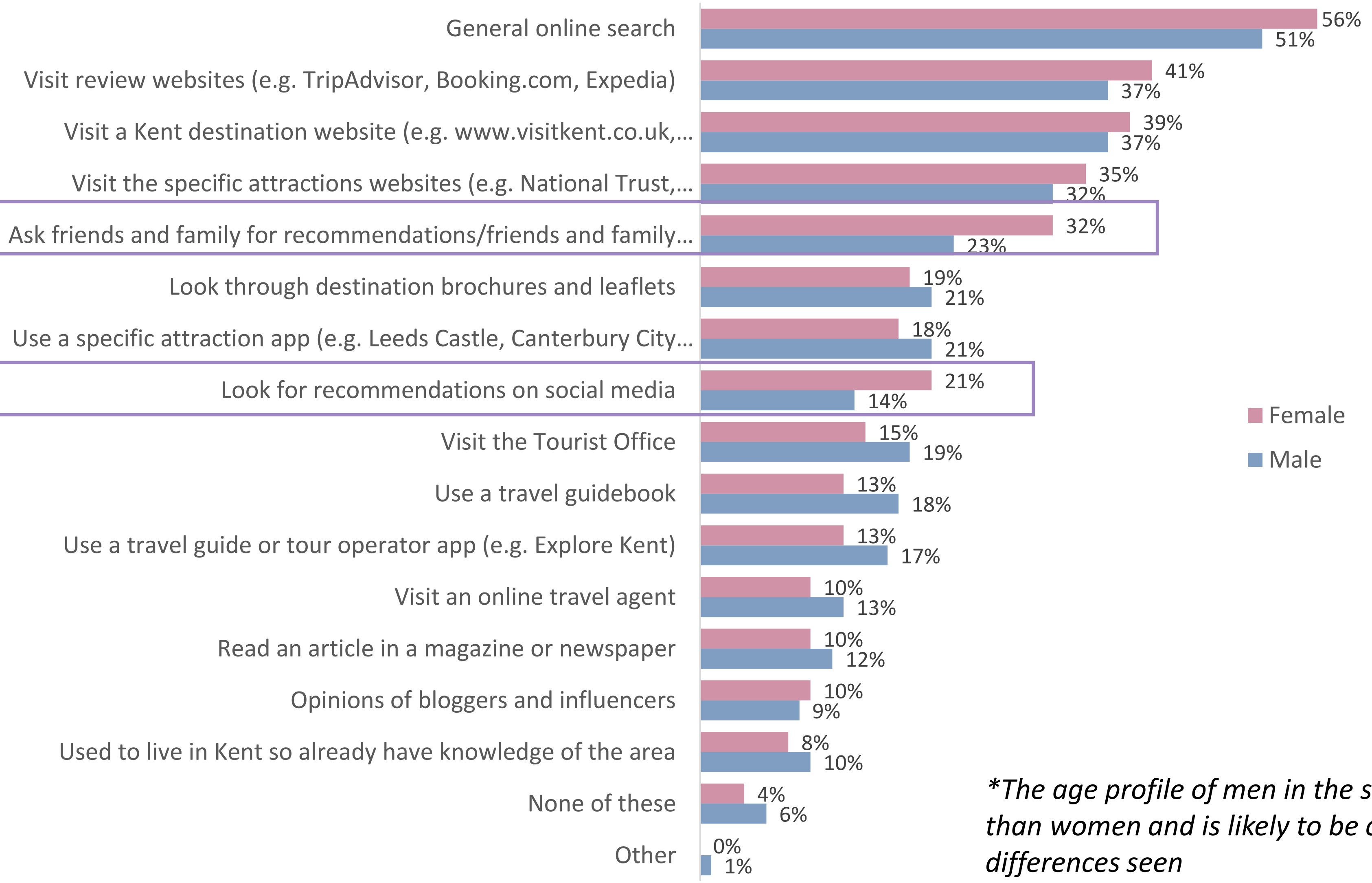
Note: London is a subset of the Southern England total

Q51 And which of the following are reasons why you would choose to visit Kent? Base: Will definitely visit / consider visiting Kent in the future (1,989)

Purchase Journey and Motivations to Visit Deep-Dive

Sources of Information - by gender

1 in 3 women ask for recommendations from friends and family or via social media. Men are more likely to rely on offline channels*.

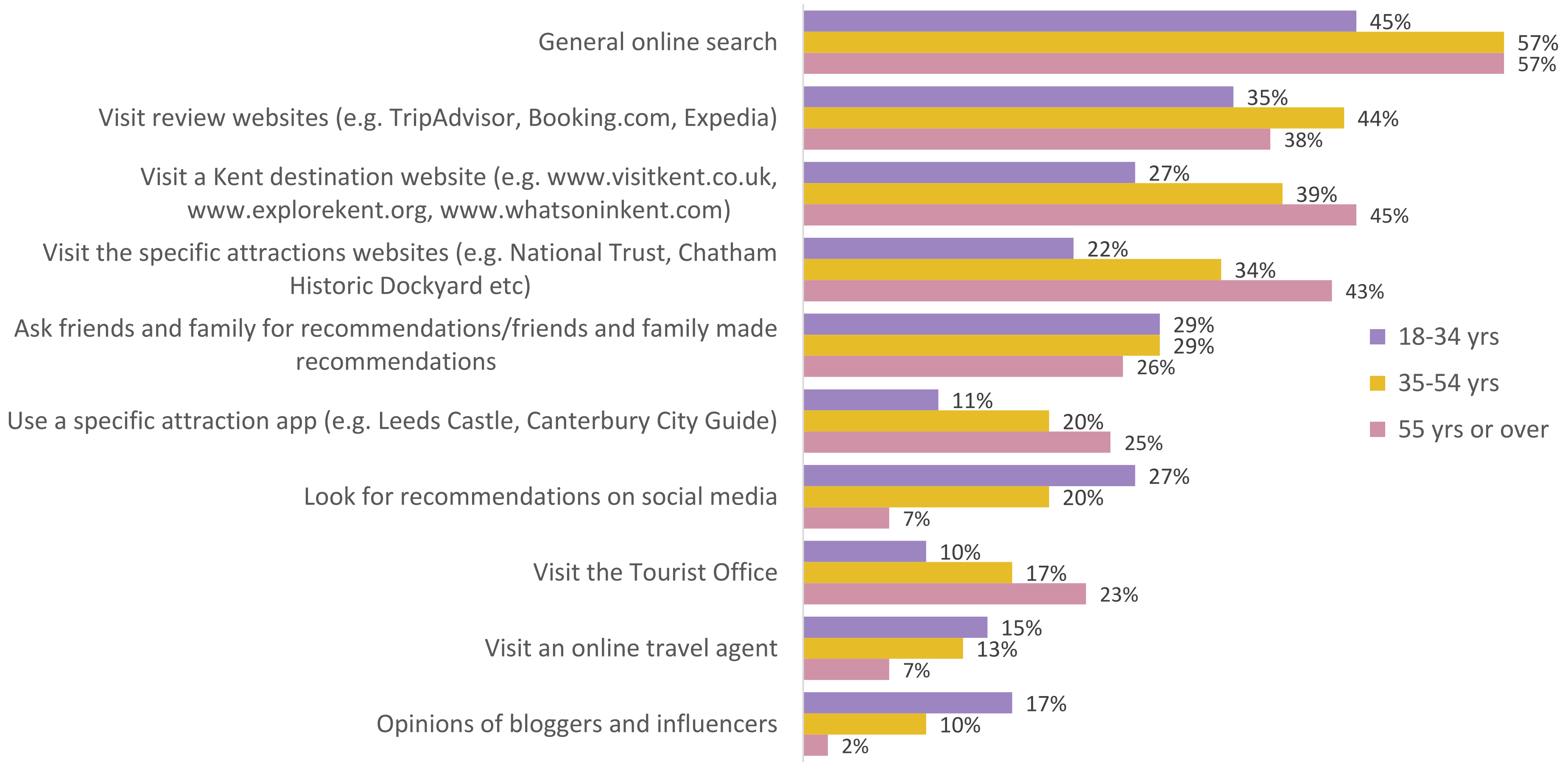


The age profile of men in the sample is slightly older than women and is likely to be contributing to the differences seen

Q42. Sources of Information

Sources of Information - by age

Importance of social media to the young, whilst tourist offices and more specific websites to older people is evident.

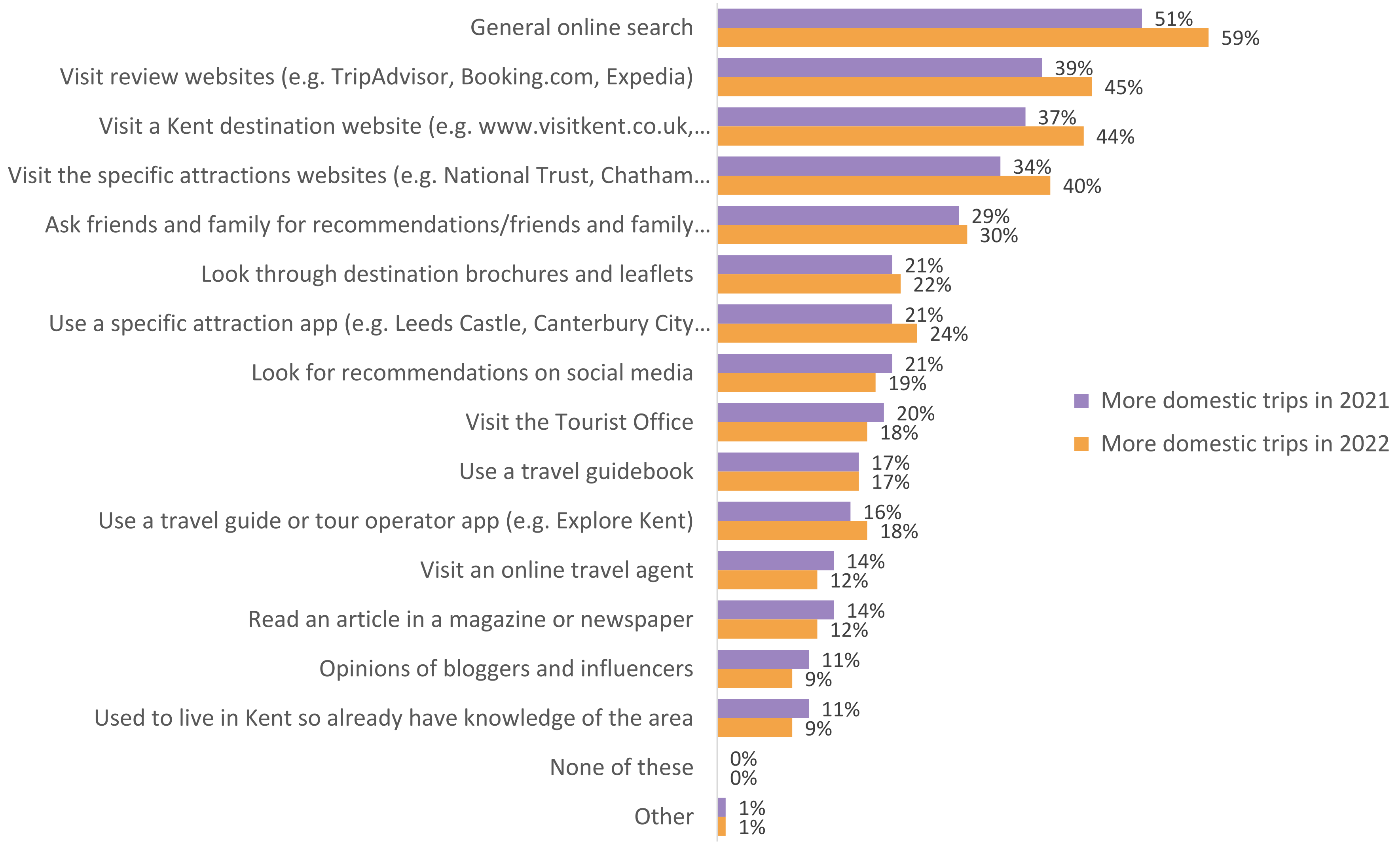


Note: Chart shows just those sources where there are large differences across the age groups

Q42. Sources of Information
Base: all (2001)

Sources of Information - by domestic trip taking

Increasing use of online resources to find information for future trips.



Q42. Sources of Information
Base: all (2001)

Sources of Information

General online searching is the top source of information for all regions whilst social media recommendations are significantly higher amongst those living in London.

	London	South West	Southern England (up to 2hr drivetime)	Midlands	Over 2hrs drivetime
General online search	48%	57%	53%	50%	57%
Visit review websites (e.g. TripAdvisor, Booking.com, Expedia)	32%	39%	37%	41%	42%
Visit a Kent destination website (e.g. www.visitkent.co.uk, www.explorekent.org, www.whatsoninkent.com)	32%	35%	38%	37%	38%
Visit the specific attractions websites (e.g. National Trust, Chatham Historic Dockyard etc)	27%	35%	34%	31%	34%
Ask friends and family for recommendations/friends and family made recommendations	29%	31%	27%	28%	29%
Look through destination brochures and leaflets	19%	18%	19%	21%	21%
Use a specific attraction app (e.g. Leeds Castle, Canterbury City Guide)	18%	17%	21%	17%	18%
Look for recommendations on social media	24%	15%	18%	19%	16%
Visit the Tourist Office	15%	16%	16%	17%	17%
Use a travel guidebook	16%	17%	14%	16%	18%
Use a travel guide or tour operator app (e.g. Explore Kent)	18%	13%	14%	16%	15%
Visit an online travel agent	14%	11%	11%	11%	13%
Read an article in a magazine or newspaper	15%	10%	13%	10%	9%
Opinions of bloggers and influencers	13%	9%	9%	11%	9%
Used to live in Kent so already have knowledge of the area	13%	7%	10%	7%	8%

Q42. If you were planning a future visit to Kent, which of these resources would you be likely to use to plan your visit? Base: All respondents: 1,989

Sources of Information

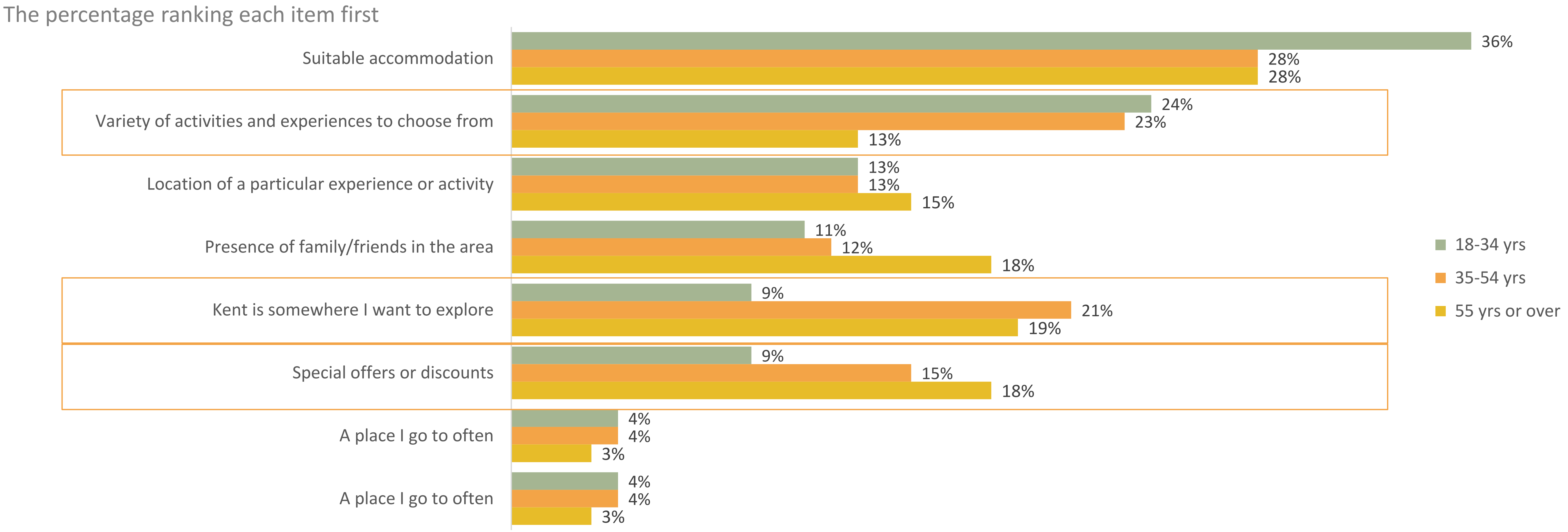
Those visiting with older children are more likely to seek out specific information from destination or attraction websites. Those travelling alone or as a couple are less likely to read opinions of others on social media/bloggers.

	With younger children (0-12 yrs)	With older children (12 yrs+)	Alone/couple	Adult Group
General online search	44%	52%	52%	51%
Visit review websites (e.g. TripAdvisor, Booking.com, Expedia)	34%	37%	35%	39%
Visit a Kent destination website (e.g. www.visitkent.co.uk, www.explorekent.org, www.whatsoninkent.com)	31%	44%	35%	40%
Visit the specific attractions websites (e.g. National Trust, Chatham Historic Dockyard etc)	29%	38%	33%	33%
Ask friends and family for recommendations/friends and family made recommendations	28%	28%	28%	32%
Look through destination brochures and leaflets	23%	22%	17%	21%
Use a specific attraction app (e.g. Leeds Castle, Canterbury City Guide)	19%	27%	18%	21%
Look for recommendations on social media	21%	22%	13%	23%
Visit the Tourist Office	16%	20%	17%	17%
Use a travel guidebook	16%	13%	15%	16%
Use a travel guide or tour operator app (e.g. Explore Kent)	16%	20%	13%	16%
Visit an online travel agent	14%	15%	10%	10%
Read an article in a magazine or newspaper	18%	16%	10%	11%
Opinions of bloggers and influencers	18%	13%	6%	11%
Used to live in Kent so already have knowledge of the area	17%	14%	10%	8%

Q42. If you were planning a future visit to Kent, which of these resources would you be likely to use to plan your visit?
Base: All visiting Kent in the past (with younger children (305), with older children (179), alone/couple (719), adult group (312)

Importance of Decision Influencers

Whilst suitable accommodation is the highest ranked decision influencer for all age group,s we then see some significant differences.



Q41 Below are a number of items that might impact your decision to take a holiday in Kent. Please put them in the order you would consider them, with the aspect you would decide on first at the top of the list.
Base: All respondents: 1,989, 18-34 (586), 35-54 (715), 55+ (688)

Importance of Decision Influencers

‘Variety of activities and experiences’ is more important among those visiting with children.

	With younger children (0-12 yrs)	With older children (12 yrs+)	Alone/couple	Adult Group
Suitable accommodation	29%	29%	31%	30%
Variety of activities and experiences to choose from	30%	28%	18%	20%
Location of a particular experience or activity	13%	13%	16%	17%
Presence of family/friends in the area	14%	15%	16%	13%
Kent is somewhere I want to explore	28%	28%	28%	32%
Special offers or discounts	11%	12%	14%	14%
A place I go to often	2%	3%	4%	5%

Q41 Below are a number of items that might impact your decision to take a holiday in Kent. Please put them in the order you would consider them, with the aspect you would decide on first at the top of the list.
Base: All visiting Kent in the past (with younger children (305), with older children (179), alone/couple (719), adult group (312)

Active and Outdoors

The natural environment is an established asset for Kent and the Active and Outdoors theme can inspire younger people to enjoy it.

Areas where those who say this image would really inspire them to visit Kent over-index

Demographics
- 18 – 34 years whose preferred destinations are mountains or hills or rural coastlines
- Future visits more likely to be by train

Booking Journey
- General online search more important
- Skew to high end hotel and accommodation

Kent Awareness and Perceptions
- Reasons for choosing Kent – countryside & natural beauty

Activities and Experiences
- Clean unpolluted beaches and green spaces are more important
- Shopping opportunities are less important
- Activities – outdoor activities, experiencing rural life and scenery, history and heritage sites, famous and iconic attractions, outdoor leisure pursuits
- Experiences: Foraging and Guided hikes



Food and Drink

Broad appeal across age groups, most popular among Explorers, who tend to be slightly older. There is an appetite for a wide variety of experiences, beyond just food and drink.

Areas where those who say this image would really inspire them to visit Kent over-index

Demographics

- Explorers
- More likely to take short breaks to Kent in future

Booking Journey

- Accommodation more likely to be the main reason for the visit

Kent Awareness and Perceptions

- Clean unpolluted beaches and green spaces are more important
- More familiar with places in Kent
- More likely to be positive about the quality of food and drink in Kent

Activities and Experiences

- Shopping opportunities are important
- Activities – shopping, history and heritage sites, famous iconic attractions
- Experiences – special/luxury experiences
- Vineyard tour, brewery tour, gin distillery, heritage arts tour, upcycling, wellbeing, relaxing complementary therapies, yoga etc. river tours, gin and steam train

History and Heritage

An older audience, familiar with Kent, who have enjoyed past visits. Interested in historic and iconic sites.

Areas where those who say this image would really inspire them to visit Kent over-index

Demographics

- Previously visited with a partner/spouse
- Skew to Spring visitors and outside of school holidays
- 55 years +
- Explorers

Booking Journey

- More likely to use specific attraction app to source information

Kent Awareness and Perceptions

- Those who rate their past experience of Kent 9 or 10 and those who would definitely recommend Kent as a destination
- More familiar with places in Kent
- Associate Kent with Nostalgic and traditional
- More likely to say Kent offers a distinctive authentic experience and say its history and heritage are very good or excellent
- Choose Kent for the variety of places to visit and cultural attractions

Activities and Experiences

- Clean unpolluted beaches and green spaces are more important
- Arts and Culture image set also inspires
- Activities to do in Kent: history and heritage sites, famous and iconic attractions
- Experiences of interest: heritage arts tour, river tours, gin and steam train

Arts and Culture

An older group who visit Kent with their partner. Also tuned in to history and heritage, but not overly interested in experiences.

Areas where those who say this image would really inspire them to visit Kent over-index

Demographics

- Couples who have visited Kent before
- Unlikely to visit Kent on a day trip
- Those who say COVID has made some changes to their holiday plans and expect those changes to continue into the future
- Explorers

Kent Awareness and Perceptions

- Slightly higher knowledge and/or visitation of places in Kent
- Have stronger perceptions of Kent
    - Long history and heritage and Nostalgic and traditional
    - Having a having Distinct identity and Lots to see and do
    - Beautiful, Warm and welcoming and Lush countryside
- History and Heritage image set also inspires

Activities and Experiences

- More likely to be interesting in exploring history and heritage sites and visiting famous and iconic places
- Out of the ordinary experiences such as the gin and steam locomotive

Exciting and Unexpected

A younger, diverse audience are attracted to Kent by this imagery, though interestingly they do not over-index on the 'Out of the Ordinary' experiences.

Areas where those who say this image would really inspire them to visit Kent over-index

Demographics
- Young and middle-aged people
- London residents
- People who visit with kids 5-12 years and come to Kent in the school holidays
- Asian/Asian British
- Buzzseekers

Booking Journey
- Those who book a package with a provider that included travel, accommodation and activities
- Social media recommendations are a more important source of information

Kent Awareness and Perceptions
- Generally lower awareness of all places in Kent (except Dover)

Activities and Experiences
- Escape room and treasure trail
- Relaxing experiences to enhance your wellbeing and look after your mind and body
- Glamping retreat – yurts/log cabins, eco hot tubs, spa, electric bike hire, dog spa, recording studio
- Fitness and wellbeing programme – immersed in nature, reconnecting mind, body and soul

Wellbeing

Those who are inspired by this imagery are younger and are looking for a holistic wellbeing experience including both relaxation and activity.

Areas that those who say this image would really inspire them to visit Kent over-index

Demographics

- 18 – 34 year olds
- Females
- Those whose visitor group includes children up to 12 years and therefore visit in the school holidays
- Asian/Asian British 12%
- Buzzseekers

Booking Journey

- Those for whom the accommodation is the main reason for the trip
- Those who book a package with a provider that included travel, accommodation and activities
- Social media recommendations and bloggers and influencers are more important sources of information
- Dog friendly is important to this audience

Kent Awareness and Perceptions

- Generally lower awareness of all places in Kent

Activities and Experiences

- Visiting friends and relatives
- Would visit theme parks, zoos, other visitor attractions in Kent
- Motivated by events, advertising and shopping opportunities
- Other image sets that inspire are ‘Food and Drink’ and ‘Exciting and Unexpected’

Many **experiences** appeal to this audience and appear to include both those for the adults and some that will entertain the children:

- Escape room and treasure trail
- Running tours
- Guided hikes and walks
- Equestrian activities
- Sustainable rural retreat
- Wellbeing experience - yoga, pilates and forest bathing
- Complementary therapies - osteopathy, acupuncture, reflexology, homeopathy, massage, pre and post pregnancy treatments
- Craft workshops
- Upcycling workshops
- Photography tour
- Foraging and wild food experience



Perceptions Deep Dive



Word Associations with Kent

Spontaneous word associations are quite similar across age groups. Older people more likely to reference the 'garden of England' and the history. Younger people are more likely to highlight the beach.

Under 35 years

35 – 54 years

55 years+

Q25b What are the top 3 words that come to mind when you think of Kent as a leisure destination? Base: All respondents (2,001)

Word Associations with Kent

Those visiting since March 2020 are more likely to describe Kent as relaxing, perhaps reflecting the sentiment of those taking holidays/trips during the COVID period. Those who have not visited are more likely to worry that Kent is expensive.

Visited Since March 2020

Visited Between 2017 and March 2020

Not Visited

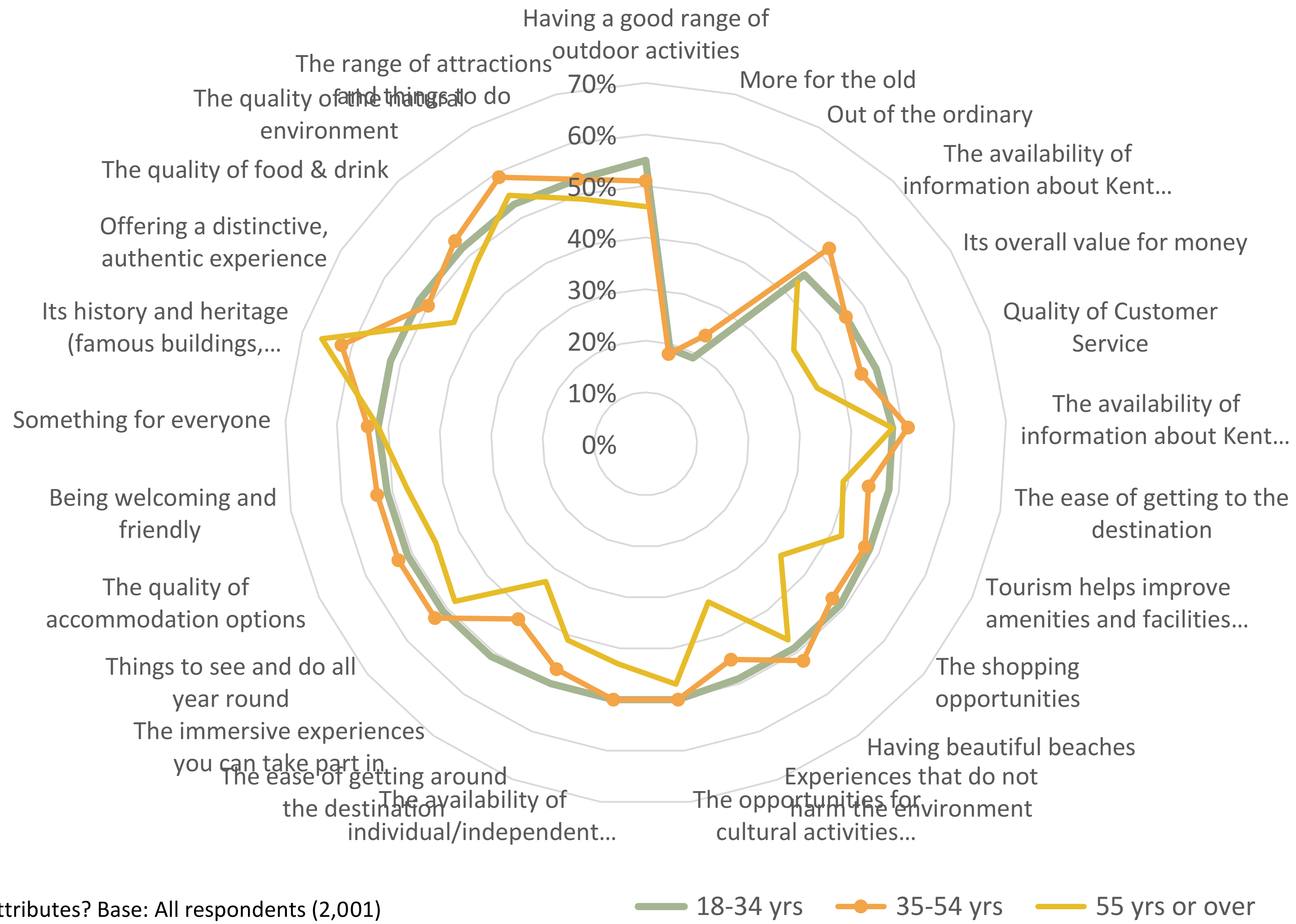
Kent attributes by age (net: excellent / very good)

The range of attractions and activities in Kent are rated the highest amongst the youngest age group, whilst history and heritage stands out for those aged 35+.

TOP 5 excellent / very good	18-34 yrs
Having a good range of outdoor activities	55%
The range of attractions and things to do	53%
The quality of the natural environment	53%
The quality of food and drink	52%
Offering a distinctive, authentic experience	52%

TOP 5 excellent / very good	35-54 yrs
Its history and heritage (famous buildings, castles, monuments)	62%
The quality of the natural environment	59%
The quality of food and drink	54%
Something for everyone	54%
The range of attractions and things to do	53%

TOP 5 excellent / very good	55+
Its history and heritage (famous buildings, castles, monuments)	66%
The quality of the natural environment	55%
Something for everyone	52%
The range of attractions and things to do	49%
The quality of food and drink	48%



Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes? Base: All respondents (2,001)



Immersive Experiences Deep Dive



Experiential Activities

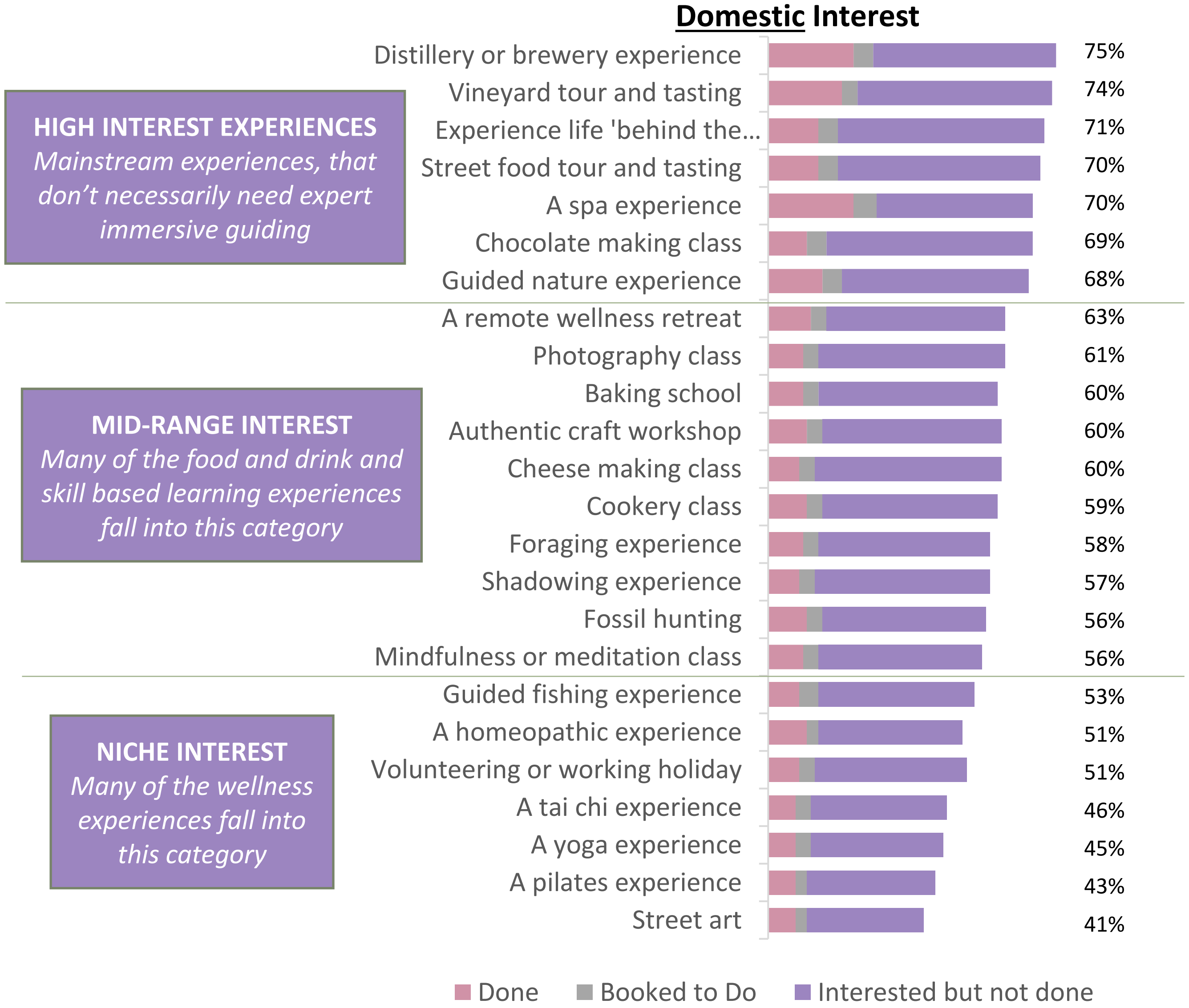
The VisitBritain Research tested over 20 individual experiential activities, assessing appeal and participation of each. Analysis also explored activities clustered by type.

Previous research for VisitBritain (pre-COVID) demonstrated levels of interest in different types of experiences. For the domestic market, mainstream, often well-established experiences had the widest appeal.
However, those experiences, because they are widely available, are not perceived as unique to a destination, or sufficiently inspiring to drive a holiday decision. It is often the more niche, immersive experiences and/or those with a connection to a specific location that are able to influence holiday destination decisions.

Therefore experiences can be viewed either as a way to increase existing visitor spend (inc. duration of stay) or as a way to entice new visitors to a destination.

Experiences most likely to drive the decision to go on a **Domestic** holiday	
Remote Wellness Retreat	29%
Volunteering or Working Holiday	22%
Yoga Experience	21%
Guided Fishing Experience	20%

Experiences **least** likely to drive the decision to go on a **Domestic** holiday	
Distillery or Brewery Tour	6%
Vineyard Tour & Tasting	6%
Chocolate Making Class	7%



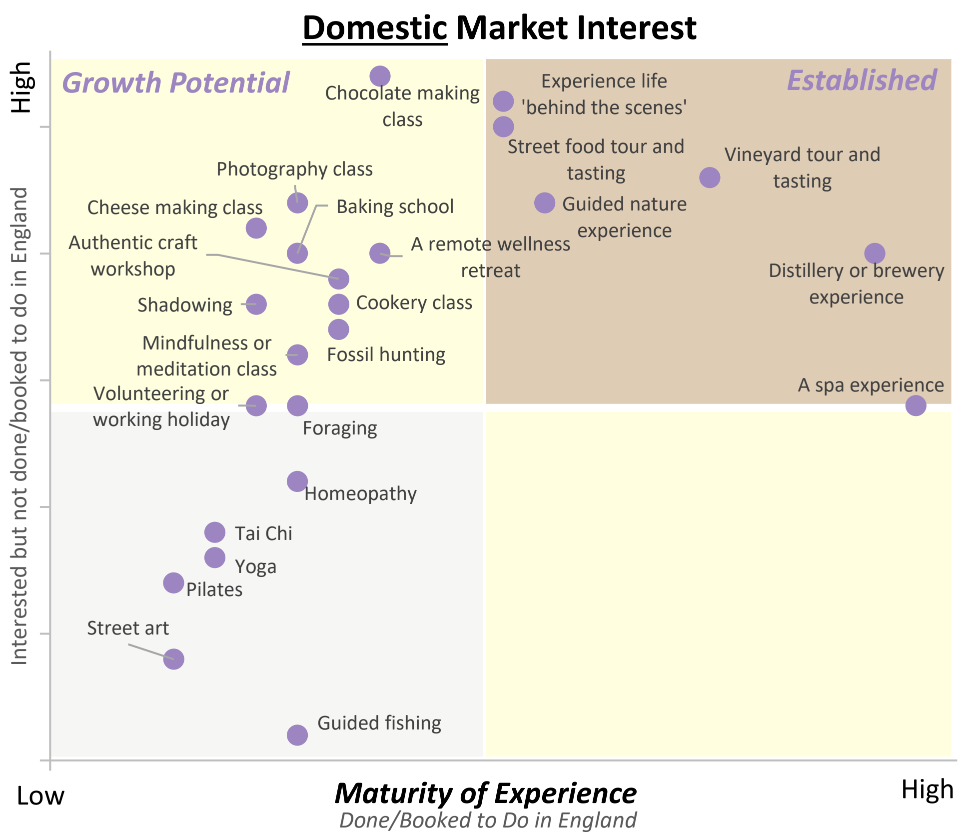
Source: VisitBritain BTA 1043 Discover England Fund Research 2018/19
[Experiential activity research | VisitBritain]

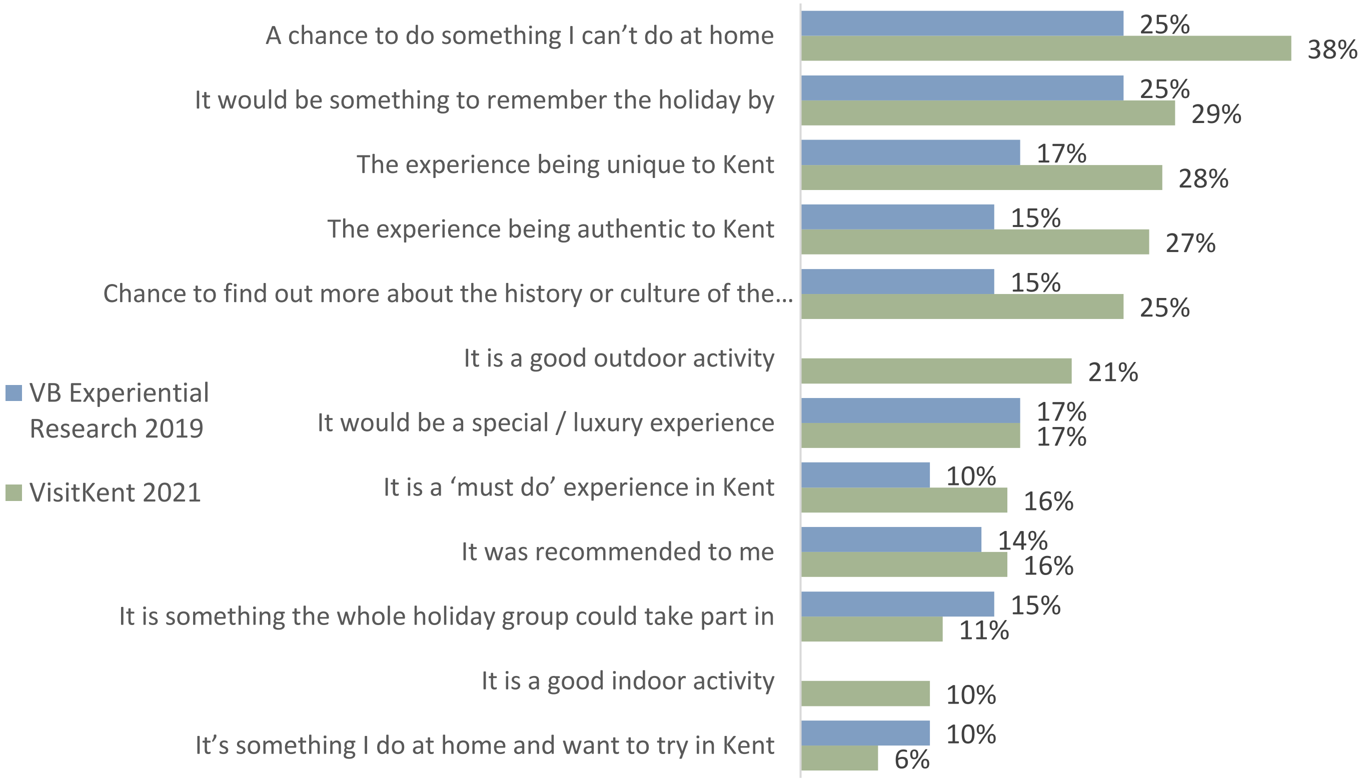
Experiential Activities

Established experiences that are already popular have continued appeal. Learning experiences typically also have strong growth potential. The importance of uniqueness to a destination, authenticity and the creation of memories are key to experiences that are successful.

Established experiences have past and future appeal, but their lack of uniqueness to a destination can limit their value to upsell rather than new visitor attraction.

Experiences being different to home activities, unique to the area and authentic remain key attributes. Experiences that are immersive enable people to create memories. Experiences can also provide insight into the history and culture of a place.



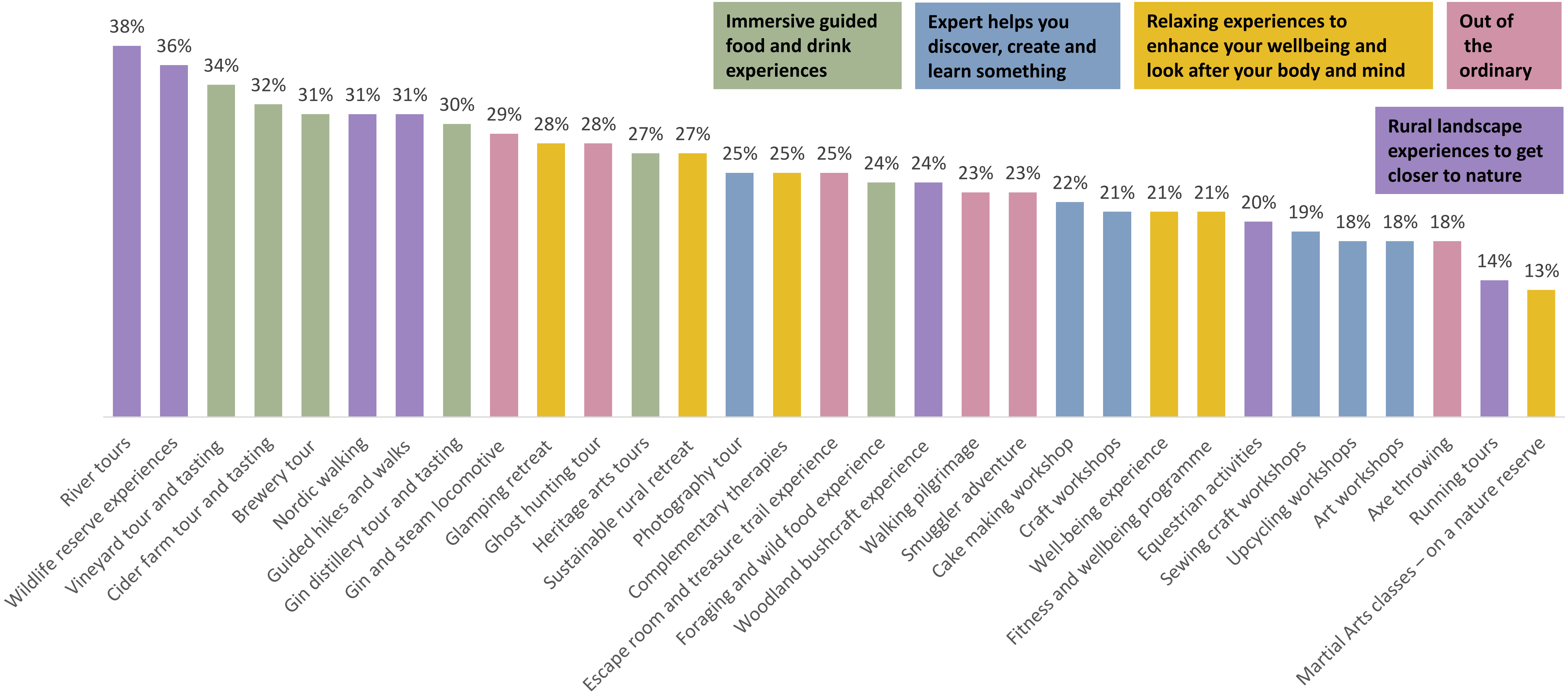


Source: VisitBritain BTA 1043 Discover England Fund Research 2018/19
Experiential activity research | VisitBritain

Q53 When planning what to do on a visit/holiday, which of the following would encourage you to take part in an activity or visit a particular place in Kent?

Immersive Experiences

Rural landscape and recognisable food and drink experiences are the most popular overall with learning and wellbeing experiences having lower interest levels.



Q57/58/59 Would you consider doing any of these ….experiences …..in the future whilst on a holiday or short break in Kent?
Will definitely visit / consider visiting Kent in the future (1,989)

Immersive Experiences

River tours	Wildlife reserve experience – day and night safaris with experienced guides	Vineyard tour and tasting – and immersion in the wine making process	Cider farm tour and tasting	Brewery tour – craft and speciality beers and ales
+ >£25,000 income + Buzzseekers, Adventurers 38%	+ 18 – 54 years + Asian + >£60,000 income + Buzzseekers, Adventurers 36%	+ 18 – 34 years + >£25,000 income + Buzzseekers & Adventurers + Food & Drink inspires 34%	+ 18 – 54 years + 2hrs+ drivetime from Kent + >£25,000 income + Adventurers and Buzzseekers + VFR 32%	+ men + white + Buzzseekers + Longer stays 31%

Nordic walking – coastal and nature reserve trails	Guided hikes and walks – off-the-beaten track footpaths and bridleways	Gin distillery tour and tasting – and creating your own flavoured gin	Gin and steam locomotive – from Royal Tunbridge Wells Railway Station	Glamping retreat – yurts/log cabins, eco hot tubs, spa, electric bike hire, dog spa, recording studio
+ Female + 18 – 54 years + Midlands + Buzzseekers, Adventurers + Longer stay + wellbeing inspires 31%	+ 18 – 34 years + Asian + Buzzseekers + Longer stays 31%	+ 18 – 34 years + London + >£60,000 income + Buzzseekers +VFR + Longer stays 30%	+ >£25,000 income + Buzzseekers + Longer stay 29%	+ Female + 18 – 54 years + Asian/ other ethnicity + >£25,000 income + Buzzseekers + School holidays + Food & Drink and Wellbeing inspire 28%

Q57/58/59 Would you consider doing any of these ….experiences …..in the future whilst on a holiday or short break in Kent?
Will definitely visit / consider visiting Kent in the future (1,989)

Immersive guided food and drink experiences

Expert helps you discover, create and learn something

Relaxing experiences to enhance your wellbeing and look after your body and mind

Rural landscape experiences to get closer to nature

Out of the ordinary

Immersive Experiences

Ghost hunting tour	Heritage arts tours – delivered by guides dressed as historical characters relevant to Kent	Sustainable rural retreat – farm, harvesting organic produce, foraging, jam making	Photography tour – various locations (city, forest and downs)	Complementary therapies - osteopathy, acupuncture, reflexology, homeopathy,
+ 18 -54 years + Buzzseekers + Exciting & Unexpected inspires	+ 18 – 34 years + London + White other/Asian + Buzzseekers + Longer stays + History & Heritage inspires	+ 18-34 years + Buzzseekers + Longer stays + Wellbeing inspires	+ 18 – 34 years + Asian/other ethnicity + Buzzseekers + Adult group + wellbeing Inspires	+ 18 – 34 yars + London + Asian, other ethnicity + Buzzseekers + Longer stays + school holidays + Wellbeing & Exciting/Unexpected inspire
28%	27%	27%	25%	25%

Escape room and treasure trail experience	Foraging and wild food experience – by bicycle, identify and collect wild plants	Woodland bushcraft experience – camping, forest bathing	Walking pilgrimage – along the Augustine Camino pilgrimage route	Smuggler adventure
+ 18 – 34 years + London + Asian, other ethnicity + Buzzseekers + VFR + Wellbeing & Exciting/Unexpected inspire	+ 18 – 34 years + London + Asian, other ethnicity + Buzzseekers + with children in school holidays + Longer stay + Wellbeing inspires	+ 18 – 54 years + Buzzseekers + Younger children + School holidays + Longer stay + Wellbeing & Exciting/Unexpected inspire	+ 18 – 34 years + London + Buzzseekers, Adventurers + Longer stay	+ 18 – 54 years + Buzzseekers, Adventurers + VFR + School holidays + Wellbeing & Exciting/Unexpected inspire
25%	24%	24%	23%	23%

Q57/58/59 Would you consider doing any of these ….experiences …..in the future whilst on a holiday or short break in Kent?
Will definitely visit / consider visiting Kent in the future (1,989)

Immersive guided food and drink experiences | **Expert helps you discover, create and learn something** | **Relaxing experiences to enhance your wellbeing and look after your body and mind** | **Rural landscape experiences to get closer to nature** | **Out of the ordinary**

Immersive Experiences

Cake making workshop	Craft workshops - learning a new skill e.g. dried flower art	Wellbeing experience - yoga, pilates and forest bathing	Fitness and wellbeing programme, reconnecting mind, body and soul	Equestrian activities - Shire horse driving or horse-riding experience
+ 18 – 34 years + London + Asian/other ethnicity + Buzzseekers & Culture Buffs + visit with younger children (0 12 yrs) in school holidays + Wellbeing & Exciting/ Unexpected inspire 22%	+ Female + 18 – 34 years + London + Asian + Buzzseekers + Longer stay + School holidays + Wellbeing & Exciting/ Unexpected inspire 21%	+ Female + 18 – 54 years + London + >£60,000 income + Buzzseekers, Culture Buffs + Wellbeing & Exciting/ Unexpected inspire 21%	+ 18 – 54 years + London, Southern England + Asian + Buzzseekers, Culture Buffs + Wellbeing & Exciting/ Unexpected inspire 21%	+ 18 – 54 years + London + Asian + Buzzseekers + Younger children + Longer stay + wellbeing inspires 20%

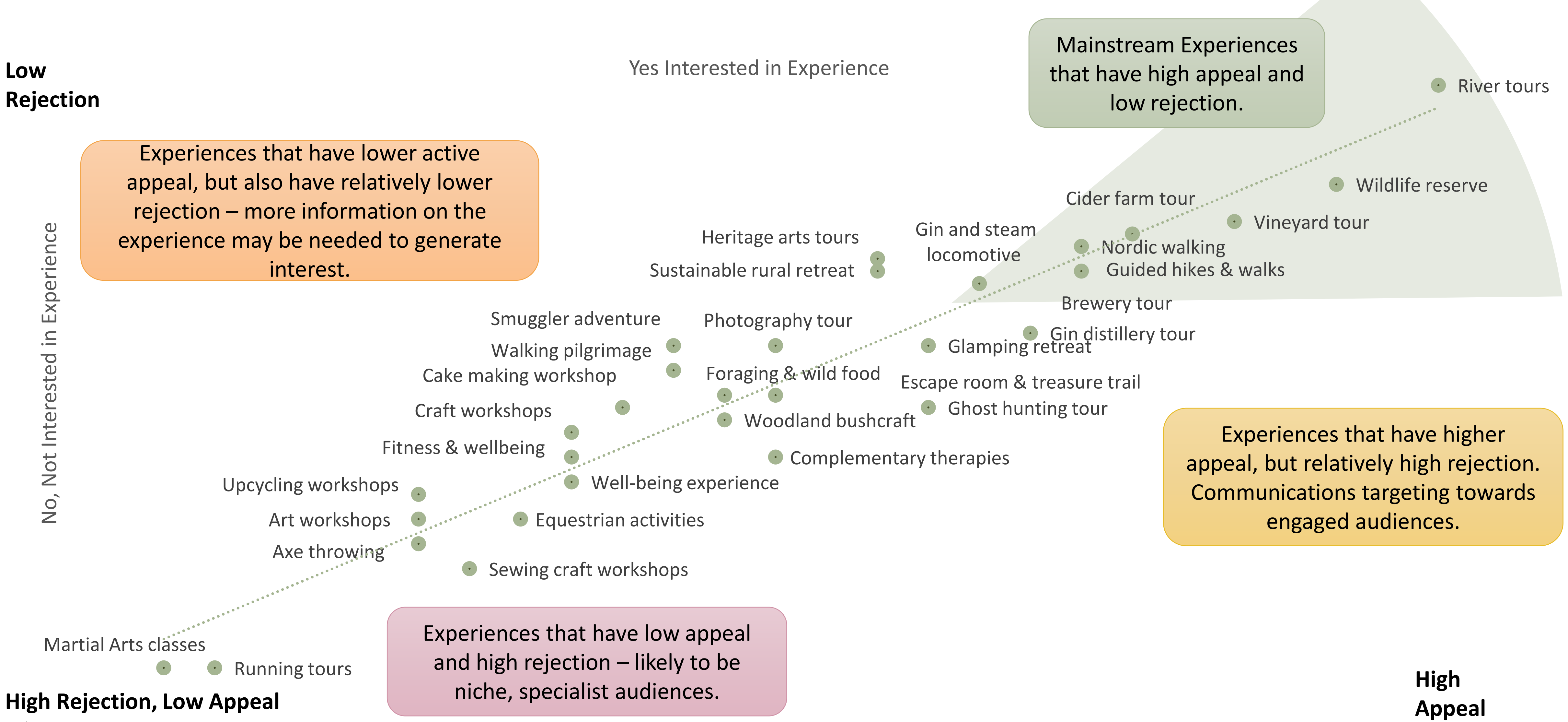
Sewing craft workshops – dressmaking, hat making etc.	Upcycling workshops	Art workshops	Axe throwing	Running tours	Martial Arts classes – on a nature reserve
+ Female + 18 – 34 years + London + White other, Asian & other ethnicity + Buzzseekers + Longer stays + Exciting/Unexpected & Wellbeing inspire 19%	+ 18 – 34 years + Asian + Buzzseekers + VFR + younger children + longer stay + Wellbeing inspires 18%	+ 18 – 34 years + London + Asian + Buzzseekers + School holidays + Wellbeing inspires 18%	+ 18 – 44 years + London + Buzzseekers + Longer stay + School holidays + Wellbeing & Exciting/ Unexpected inspire 18%	+ 18 – 34 years + London + Buzzseekers + Longer stays + Wellbeing inspires 14%	+ 18 – 34 years + Buzzseekers + Longer stays + Exciting/Unexpected & Wellbeing inspire 13%

Immersive guided food and drink experiences | Expert helps you discover, create and learn something | Relaxing experiences to enhance your wellbeing and look after your body and mind | Rural landscape experiences to get closer to nature | Out of the ordinary

Q57/58/59 Would you consider doing any of these ….experiences …..in the future whilst on a holiday or short break in Kent?
Will definitely visit / consider visiting Kent in the future (1,989)

Immersive Experiences

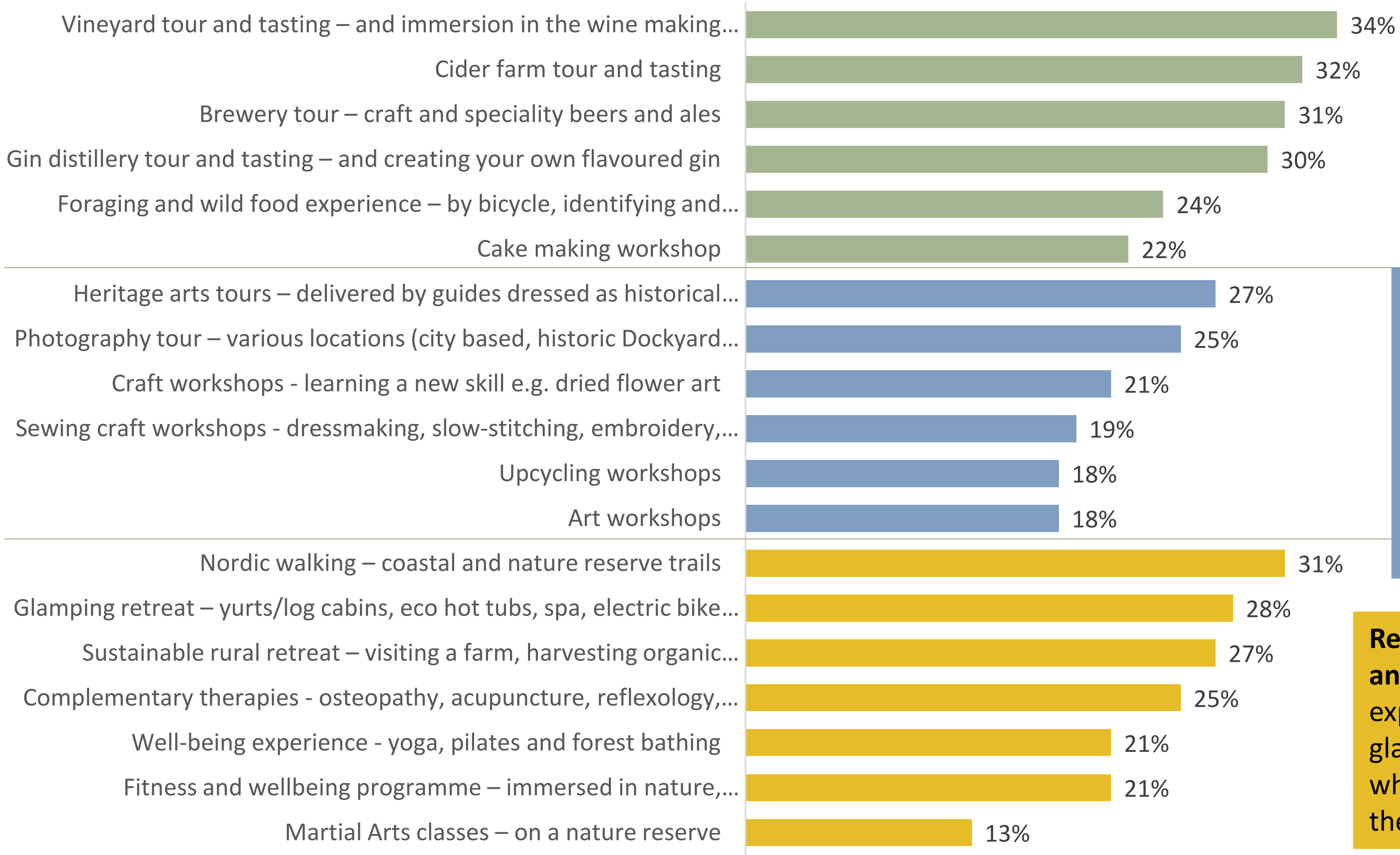
Plotting interest against rejection shows a fairly consistent pattern with high appeal experiences typically having low rejection, however there are experiences that either have higher levels of ambivalence or are more polarising.



Q57/58/59 Would you consider doing any of these ….experiences …..in the future whilst on a holiday or short break in Kent?
Will definitely visit / consider visiting Kent in the future (1,989)

Immersive Experiences

More established or identifiable experiences have the highest appeal in each category.



Immersive guided food and drink experiences: Vineyards, breweries, cideries and gin distilleries are the most popular of the food and drink experiences tested. These are familiar experiences that are understood by visitors. However they are not necessarily unique to Kent.

Expert helps you discover, create and learn something: Learning experiences are more niche, but still have strong interest. Heritage arts tours and photography tours have highest appeal in this group, reflecting their connection to history and to iconic sites. They are perhaps also experiences with appeal across generations.

Relaxing experiences to enhance your wellbeing and look after your body and mind: Wellbeing experiences vary in appeal. Nordic walking, glamping and rural retreats are most popular, while other experiences tested are more niche in their appeal.

Q57/58/59 Would you consider doing any of these ….experiences …..in the future whilst on a holiday or short break in Kent?
Will definitely visit / consider visiting Kent in the future (1,989)

Immersive Experiences

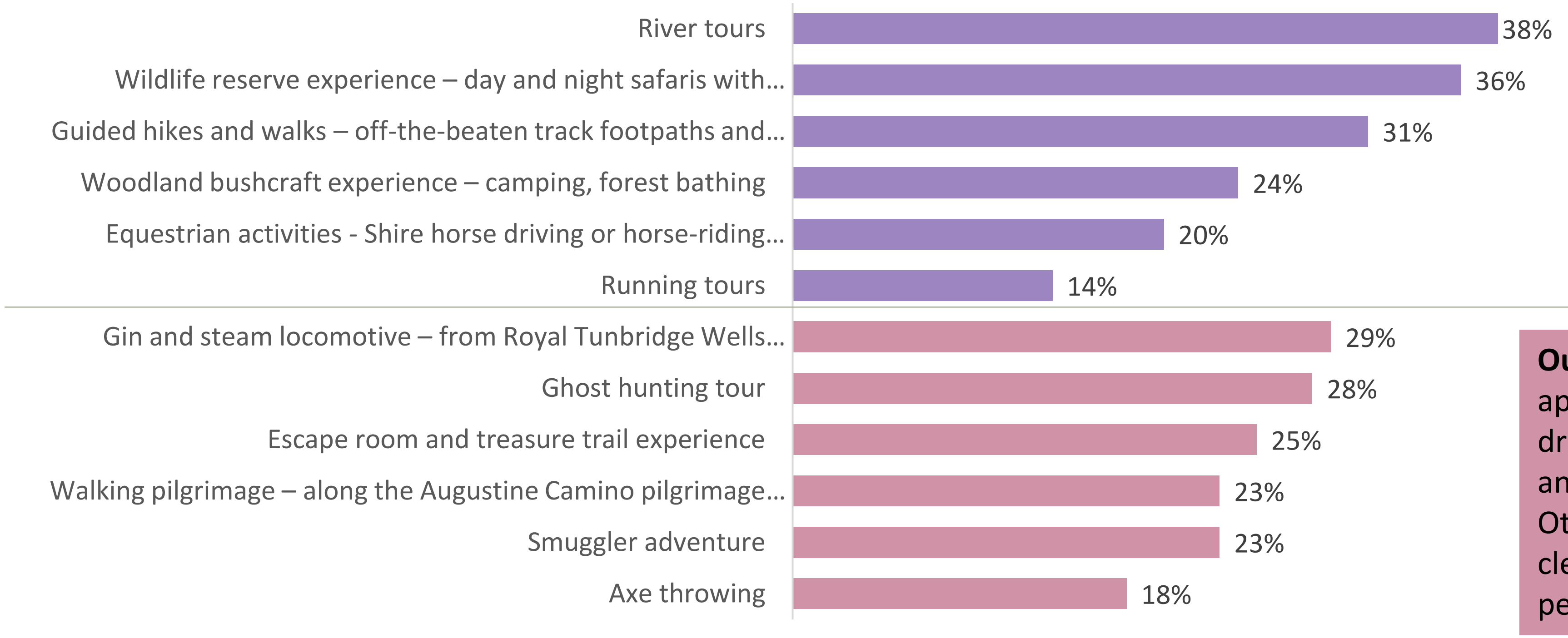
VISIT KENT BUSINESS GARDEN of ENGLAND

Interreg France (Channel Manche) England EXPERIENCE European Regional Development Fund

EUROPEAN UNION European Regional Development Fund

XV Insight

Niche and less well-known experiences tend to have lower appeal overall.



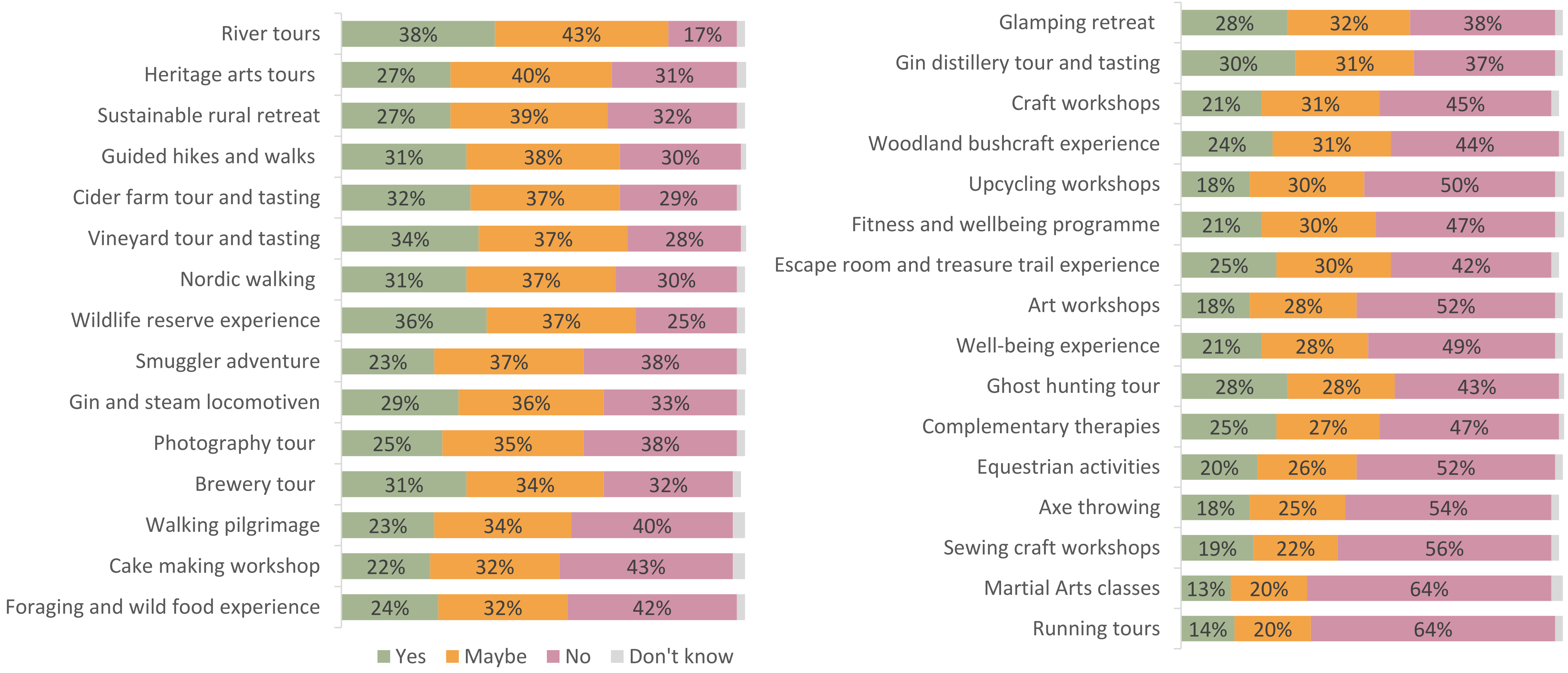
Rural landscape experiences to get closer to nature: River tours, safaris and guided hikes are popular experiences and can be tailored to suit different visitor profiles Other experiences in this section are more niche though do still have an audience.

Out of the ordinary: Gin and steam has good appeal, capturing both those with a food and drink interest and those interested in heritage and history.
Other experiences in this section may need clear communication to inform and inspire people to take part in them.

Q57/58/59 Would you consider doing any of these ….experiences …..in the future whilst on a holiday or short break in Kent?
Will definitely visit / consider visiting Kent in the future (1,989)

Immersive Experiences

Ranking experiences based on the level of ‘maybe’ responses, illustrates:
- At the high end, experiences that appear to need clear communication as short descriptions may not give enough information.
- At the low end, experiences that are either more niche or polarise opinions.



Q57/58/59 Would you consider doing any of these ….experiences …..in the future whilst on a holiday or short break in Kent?
Will definitely visit / consider visiting Kent in the future (1,989)

Immersive Experiences

Experience descriptions used within the research.

Immersive guided food and drink experiences					
Cider farm tour and tasting	Cake making workshop	Vineyard tour and tasting – and immersion in the wine making process	Brewery tour – craft and speciality beers and ales	Gin distillery tour and tasting – and creating your own flavoured gin	Foraging and wild food experience – by bicycle, identifying and collecting wild plants

Expert helps you discover, create and learn something					
Photography tour – various locations (city based, historic Dockyard of Chatham, forest and downs)	Heritage arts tours – delivered by guides dressed as historical characters relevant to Kent	Upcycling workshops	Sewing craft workshops - dressmaking, slow-stitching, embroidery, knitting, crochet, hat making, rejuvenation of old clothes	Craft workshops - learning a new skill e.g. dried flower art	Art workshops

Relaxing experiences to enhance your wellbeing and look after your body and mind						
Complementary therapies - osteopathy, acupuncture, reflexology, homeopathy, massage, pre & post pregnancy treatments	Martial Arts classes – on a nature reserve	Wellbeing experience - yoga, pilates and forest bathing	Fitness and wellbeing programme – immersed in nature, reconnecting mind, body and soul	Glamping retreat – yurts/log cabins, eco hot tubs, spa, electric bike hire, dog spa, recording studio	Sustainable rural retreat – visiting a farm, harvesting organic market produce, foraging, cooking and jam making	Nordic walking – coastal and nature reserve trails

Rural landscape experiences to get closer to nature					
Equestrian activities - Shire horse driving or horse-riding experience	Woodland bushcraft experience – camping, forest bathing	Wildlife reserve experience – day and night safaris with experienced guides	Guided hikes and walks – off-the-beaten track footpaths and bridleways	Running tours	River tours

Out of the ordinary					
Axe throwing	Escape room and treasure trail experience	Walking pilgrimage – along the Augustine Camino pilgrimage route	Gin and steam locomotive – from Royal Tunbridge Wells Railway Station	Ghost hunting tour	Smuggler adventure

Q57/58/59 Would you consider doing any of these ….experiences …..in the future whilst on a holiday or short break in Kent?
Will definitely visit / consider visiting Kent in the future (1,989)



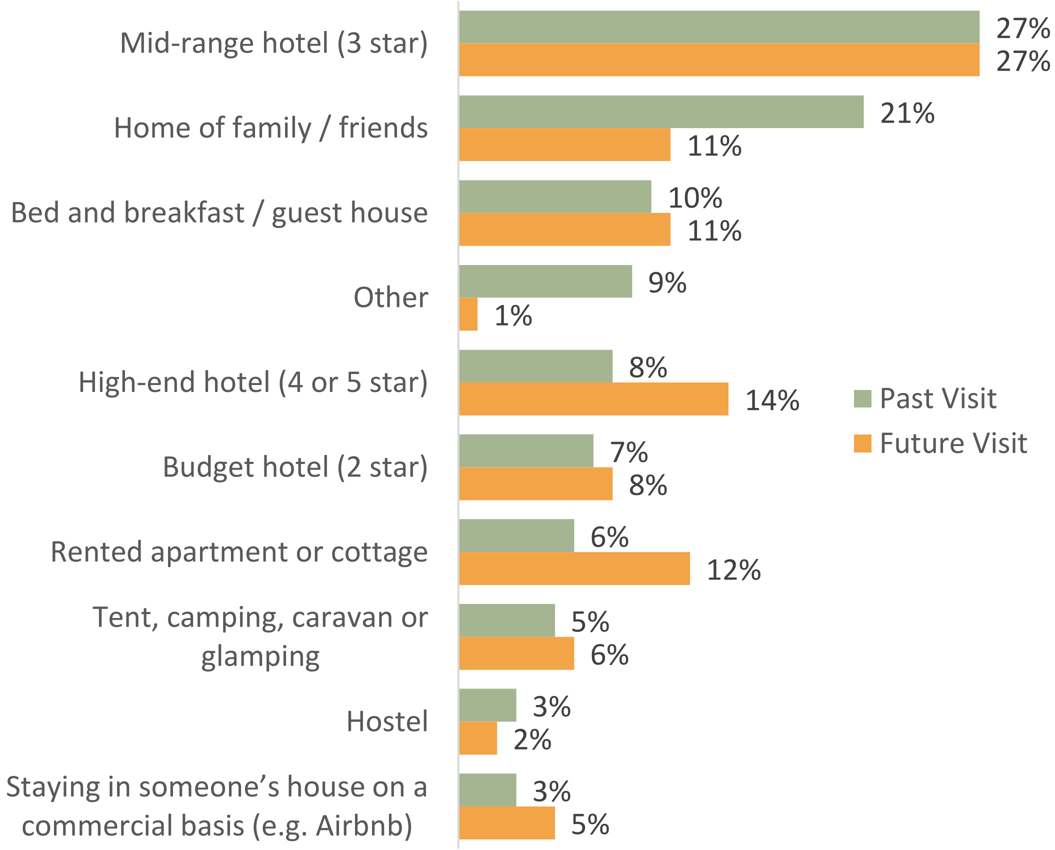
Accommodation Deep Dive



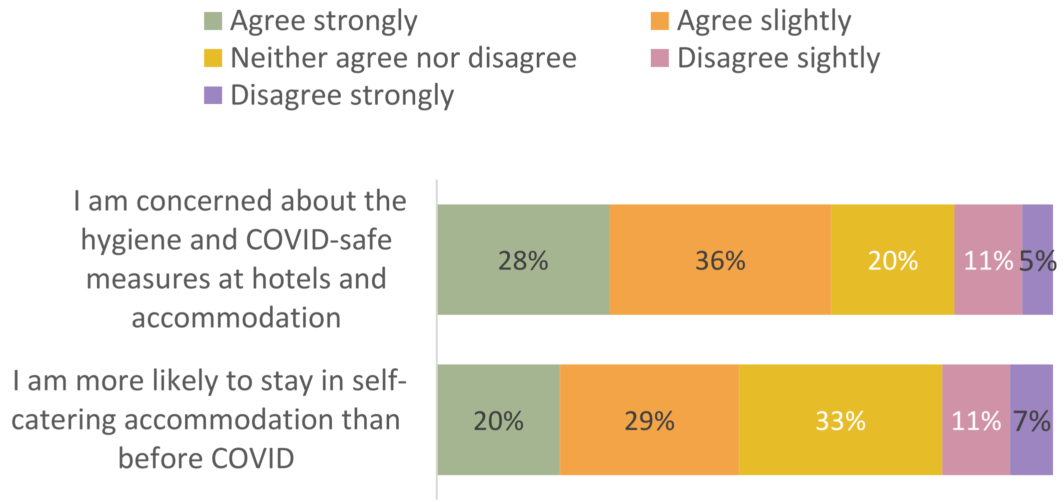
Accommodation

Accommodation preferences appear to be diverging with increases in both high-end hotels and rented apartments for future holidays in Kent.

Between past and future visits to Kent, there is a swing towards both higher-end hotels and to rented accommodation, away from staying with family and friends.



This perhaps reflects the concerns felt about hygiene measures in accommodation that may move people towards higher-end hotels and/or self-catering.



Q23 What type of accommodation did you stay in on your last visit/short break/holiday in Kent? Base: 1470 past visitors to Kent
Q46 What type of accommodation would you be most likely to stay in on a short break/holiday in Kent? Base: 1989 will consider Kent in future

Satisfaction with Accommodation Choices

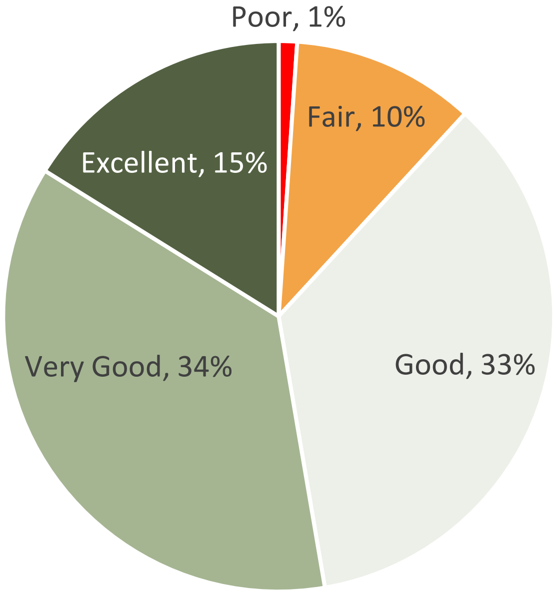
Satisfaction with accommodation options is high, particularly among those visiting more recently.

Generally experience and expectations of accommodation in Kent are positive, though there is potential to build a stronger reputation to move more people from 'good' or 'very good' to excellent.

Those from further away from Kent have the most positive perceptions of accommodation (55% rate as excellent/very good) with those from Wales and Scotland scoring highest.

Encouragingly those who have visited Kent recently have a more positive opinion of accommodation than those who visited several years ago or have not been to Kent at all. Additionally those who have stayed longer in Kent are also more positive about the accommodation. This suggests opportunity to build stronger messaging around accommodation, perhaps making use of reviews/recommendations.

The quality of accommodation options



Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes? Base: All 2001

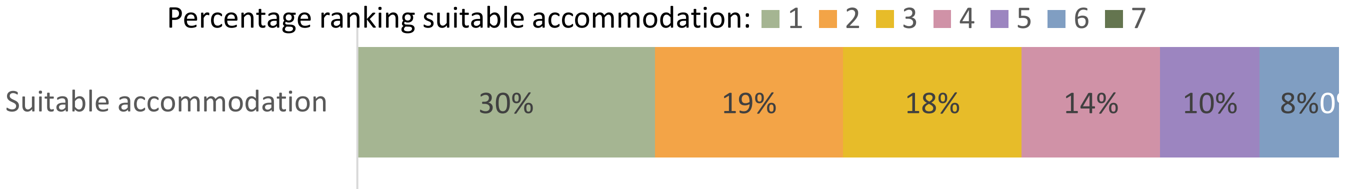
Importance of Accommodation

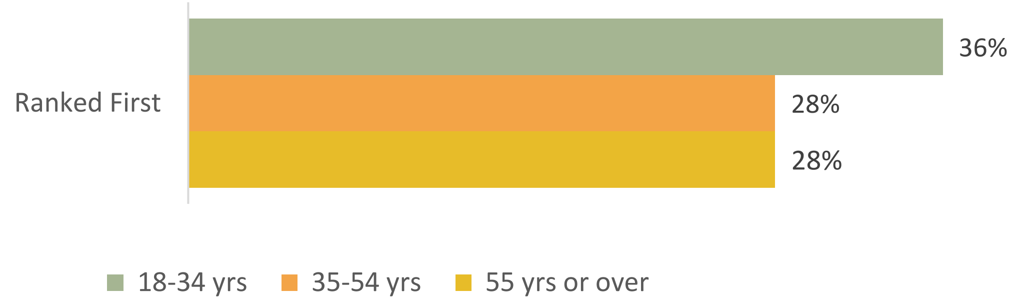
Suitable accommodation is the highest ranked decision influencer followed by the choice of things to do.

Suitable accommodation is the most important item impacting the decision to take a holiday in Kent, with 30% ranking it first and almost half ranking it 1st or 2nd.

It is more important among younger people.

34% of people living in the Midlands rank accommodation as the number one influencer.





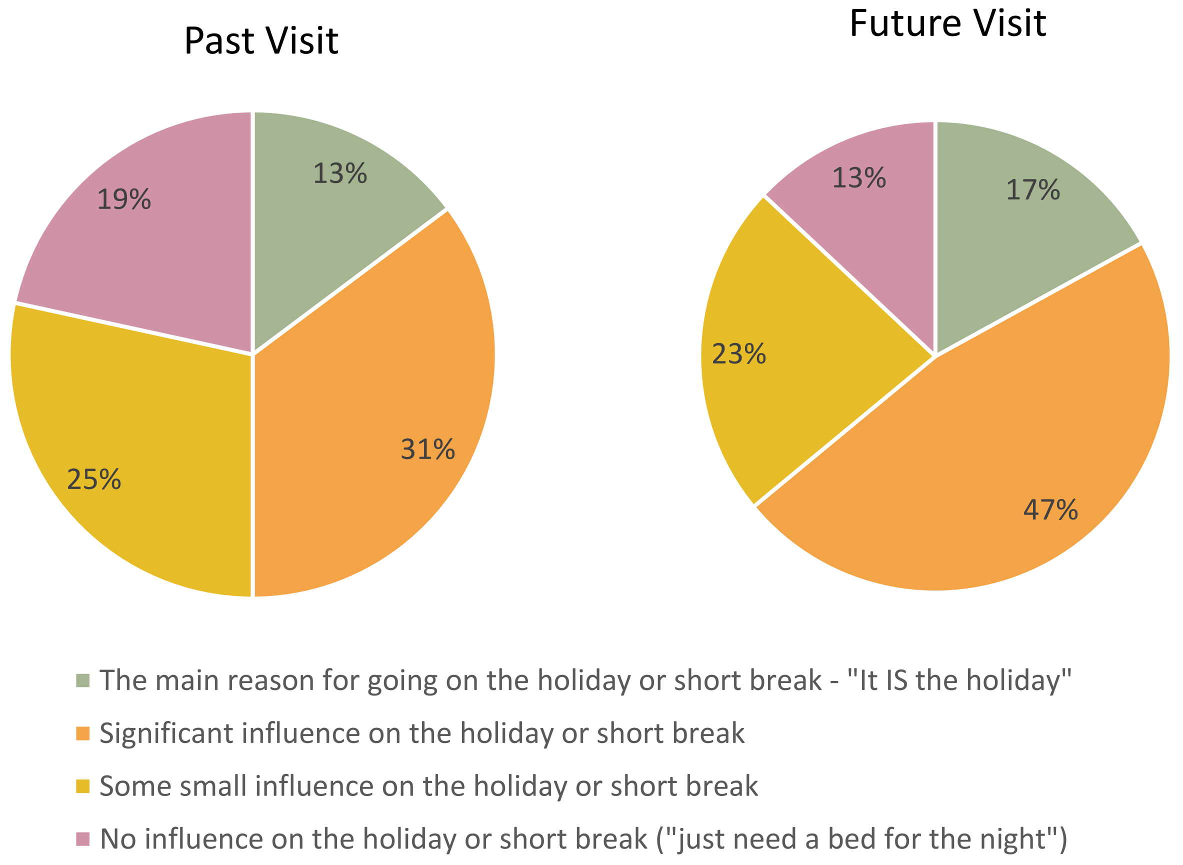
With younger children (0-12 yrs)	With older children (12 yrs+)	Alone/couple	Adult Group
29%	29%	31%	30%

Q41 Below are a number of items that might impact your decision to take a holiday in Kent. Please put them in the order you would consider them, with the aspect you would decide on first at the top of the list. Base: 1989 will consider Kent in future

Accommodation

Accommodation is a driver, or significant influencer of holiday choices, with high-end hotels in particular driving holiday destination choices.

There is an increase in the importance of accommodation type for future visits over past visits, with two-thirds saying it is the main reason for the holiday or that it has significant influence on the holiday.



High-end hotels are most likely to be the main reason for the holiday. Among those staying in hostels, two-thirds say it is the main reason or has significant influence over the destination. In contrast, commercial rentals and campsites have much less influence on holiday choices.

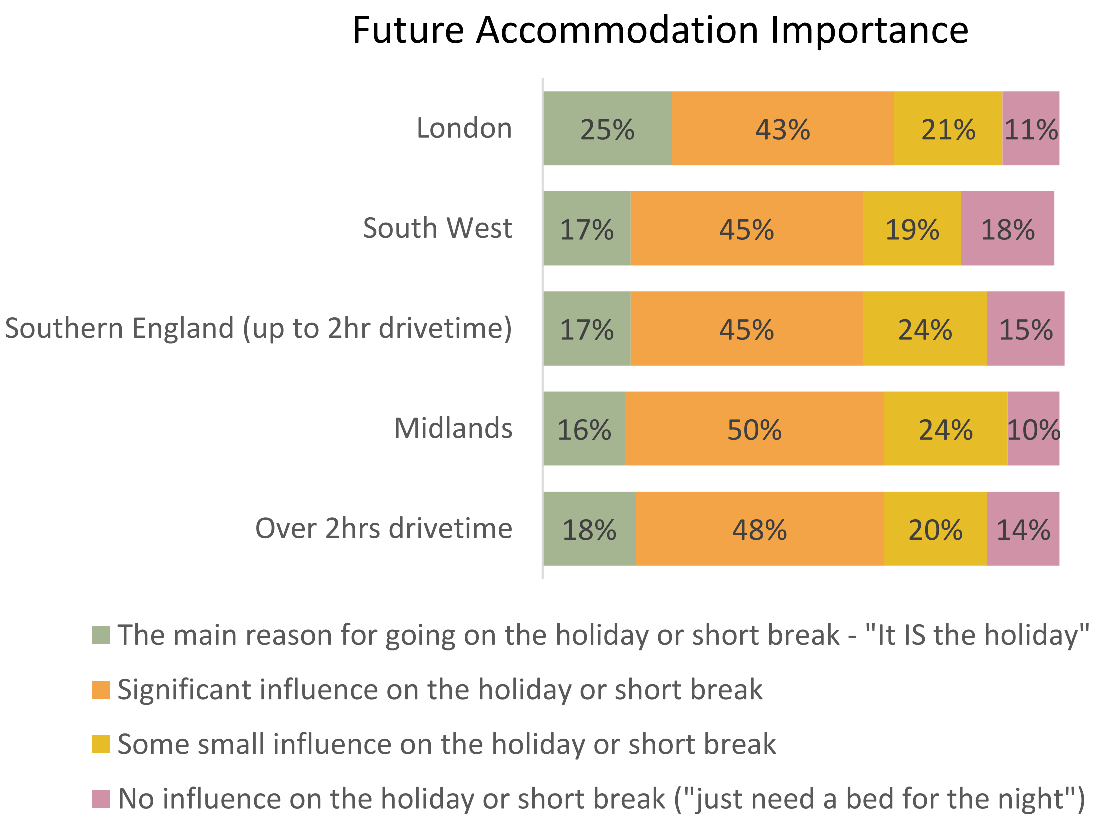
Past Visit to Kent	The main reason for going on the holiday or short break - "It IS the holiday"	Significant influence on the holiday or short break	Some small influence on the holiday or short break	No influence on the holiday or short break ("just need a bed for the night")
High-end hotel (4 or 5 star)	41%	49%	18%	7%
Mid-range hotel (3 star)	13%	43%	35%	14%
Budget hotel (2 star)	12%	30%	30%	35%
Hostel	32%	34%	29%	13%
Bed and breakfast / guest house	7%	30%	39%	22%
Rented apartment or cottage	14%	52%	27%	10%
Staying in someone’s house on a commercial basis	16%	29%	45%	10%
Tent, camping, caravan or glamping	15%	27%	27%	32%

Q24 How important was your accommodation type on your last visit/holiday in the Kent? Base: 1470 past visitors to Kent
Q47 How important would your accommodation type be on a future visit/holiday to Kent? Base: 1989 will consider Kent in future

Regional differences in accommodation preferences

Accommodation is a driving force for 1 in 4 visitors from London, who are also more likely to stay in a high-end hotel.

There is opportunity to promote high-end accommodation as the holiday destination for visitors from London, while those from further way are more likely to seek out mid-range hotels or rented accommodation.

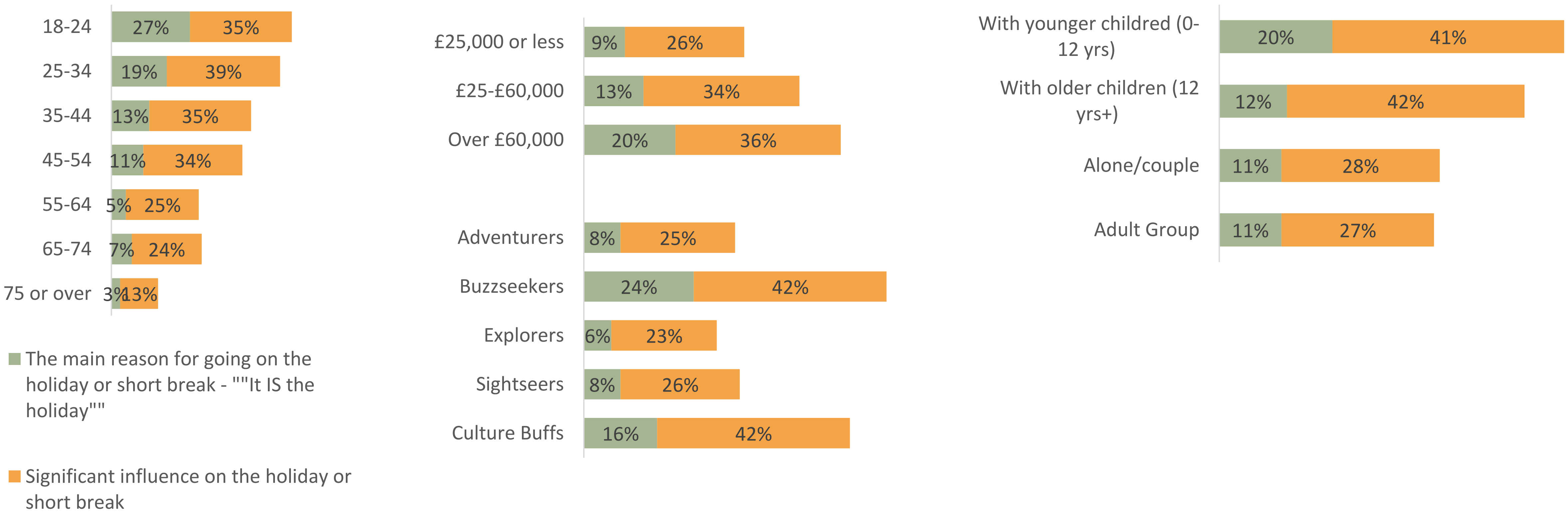


Future visit to Kent	London	South West	Southern England (up to 2hr drivetime)	Midlands	Over 2hrs drivetime
High-end hotel (4 or 5 star)	21%	13%	16%	11%	14%
Mid-range hotel (3 star)	24%	26%	26%	28%	29%
Budget hotel (2 star)	8%	7%	8%	8%	7%
Hostel	3%	1%	2%	2%	1%
Bed and breakfast / guest house	11%	10%	11%	12%	9%
Rented apartment or cottage	8%	14%	11%	15%	13%
Staying in someone's house on a commercial basis (e.g. Airbnb)	5%	5%	4%	5%	6%
Tent, camping, caravan or glamping	2%	8%	5%	7%	7%

Q47. How important would your accommodation type be on a future visit/holiday to Kent? Base: 1989 will visit Kent in future
Q46: What type of accommodation would you be most likely to stay in on a short break/holiday in Kent? Base: 1989 will consider Kent in future

Accommodation importance on last visit to Kent

Accommodation is more important to younger people, the more affluent, and those travelling with young children. 1 in 4 Buzzseekers say accommodation was the main reason for their last trip to Kent.



Q24 How important was your accommodation type on your last visit/holiday in the Kent? Base: 1470 past visitors to Kent

COVID Impact – Deep Dive

COVID Impact

The COVID-19 pandemic of 2020/2021 had catastrophic short-term impacts on the travel and leisure sectors and the longer-term impact is yet to be fully understood. This research took place as Britain was emerging from the pandemic, but while international travel was not fully 'back to normal'.

The short term impact on tourism is catastrophic and is well documented:

- **International leisure travel stopped** in many countries. Threats and implementation of further lockdowns and quarantine restrictions dissuaded many from travelling internationally.
- **Domestic tourism initially stopped** through March – June but saw **resurgence** in late July/August that continued through into 2021.

Core travel sector research programmes were stopped (IPS, GBTS GBDVS etc.) leading to an absence of comparable, benchmark data on both domestic and inbound visitor volumes/profiles.

Outcomes & Impact

Key trends that have been seen through the COVID pandemic:

- **Domestic travel is recovering more quickly than international travel**, driven by a combination of traveller sentiment, government restrictions and travel company actions.
- **Visiting Friends and Relatives became an attractive option** for many, enabling them to remain within a social 'bubble'.
- **Shorter booking lead times** emerged, with people trying to reduce the risk of cancellation or changes as the situation evolves.
- A greater acceptance of '**check before you travel'** and **pre-booking of activities and attractions** (enabling venues to manage social-distancing actions), by all segments, not just the natural 'planners'.
- Greater reliance by more people on technology has increased usage hugely and for more varied purposes. This skill will not be unlearnt and therefore **growth in online research and bookings** is expected.

All lockdown restrictions in England were lifted on the 19th July 2021, enabling free travel around the country and participation in leisure activities.

At the time of fieldwork, all domestic attractions were re-open (some recommendations around face masks, visitor numbers etc.) Travel corridors were re-opening though quarantine restrictions were still in place.

The number of COVID cases were on the rise due to the new Delta variant but the hospital and death rates were not rising at the same rate due to high levels of vaccinations.

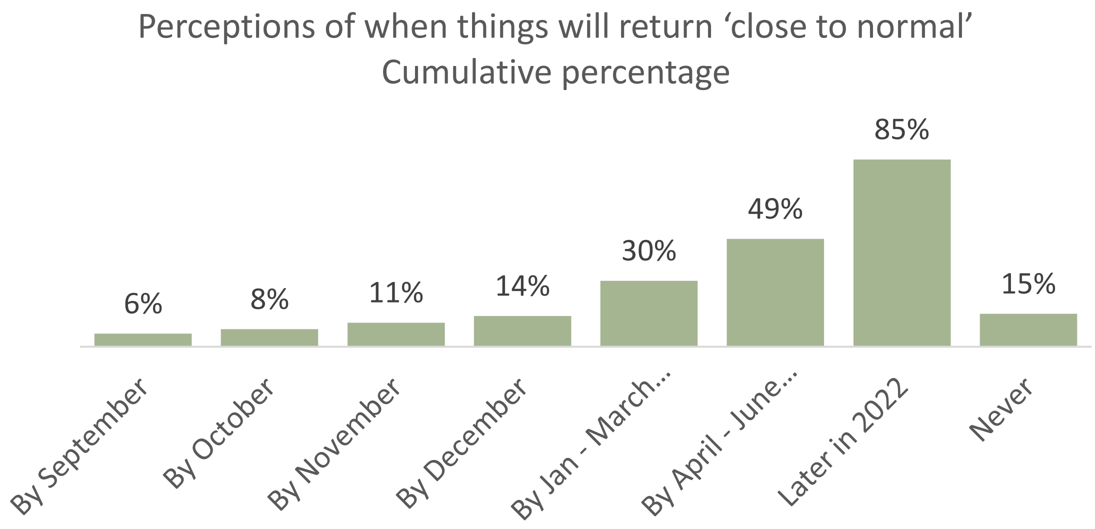
In the week ending 5th September ,the total number of vaccinations administered in England was 76,392,892.

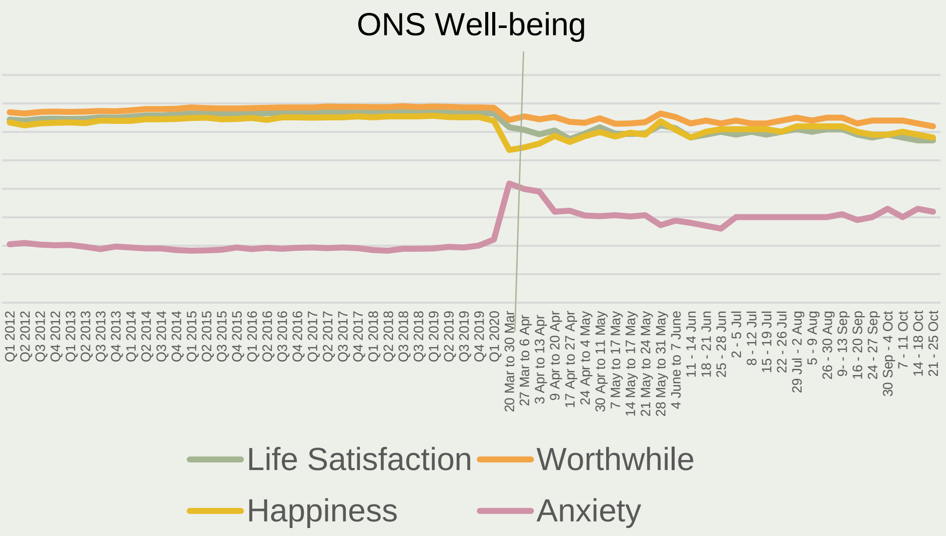
Consumer Confidence

Consumer confidence and personal wellbeing were massively impacted by the COVID pandemic and a slow return to normality is still expected by many.

Consumer confidence and personal well-being scores dropped with unprecedented single-month movement in March 2020. Through the pandemic key measures remained low, only really recovering through the second half of 2021.

Various national benchmark studies are monitoring when people believe things will ‘return to normal’. The VisitBritain COVID recovery tracker from just before the fieldwork for this project, suggests that half the population are still not confident we will be back to normal before mid-2022.





Source: COVID-19 Consumer Sentiment Tracker | VisitBritain Wave 38 Fieldwork period 23rd – 27th August 2021

Business and Consumer Confidence: Key Economic Indicators - House of Commons Library (parliament.uk)

Well-being - Office for National Statistics (ons.gov.uk)

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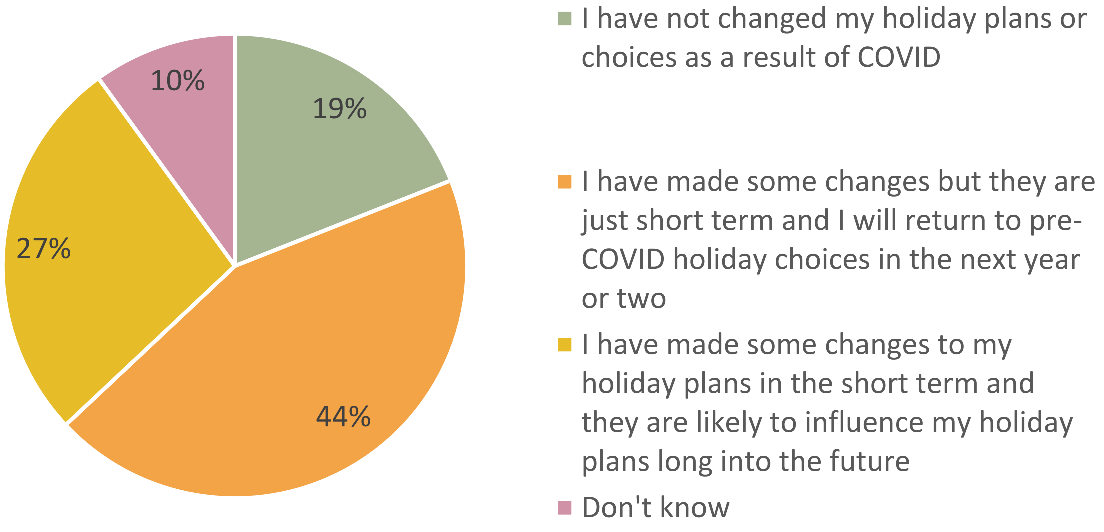
COVID

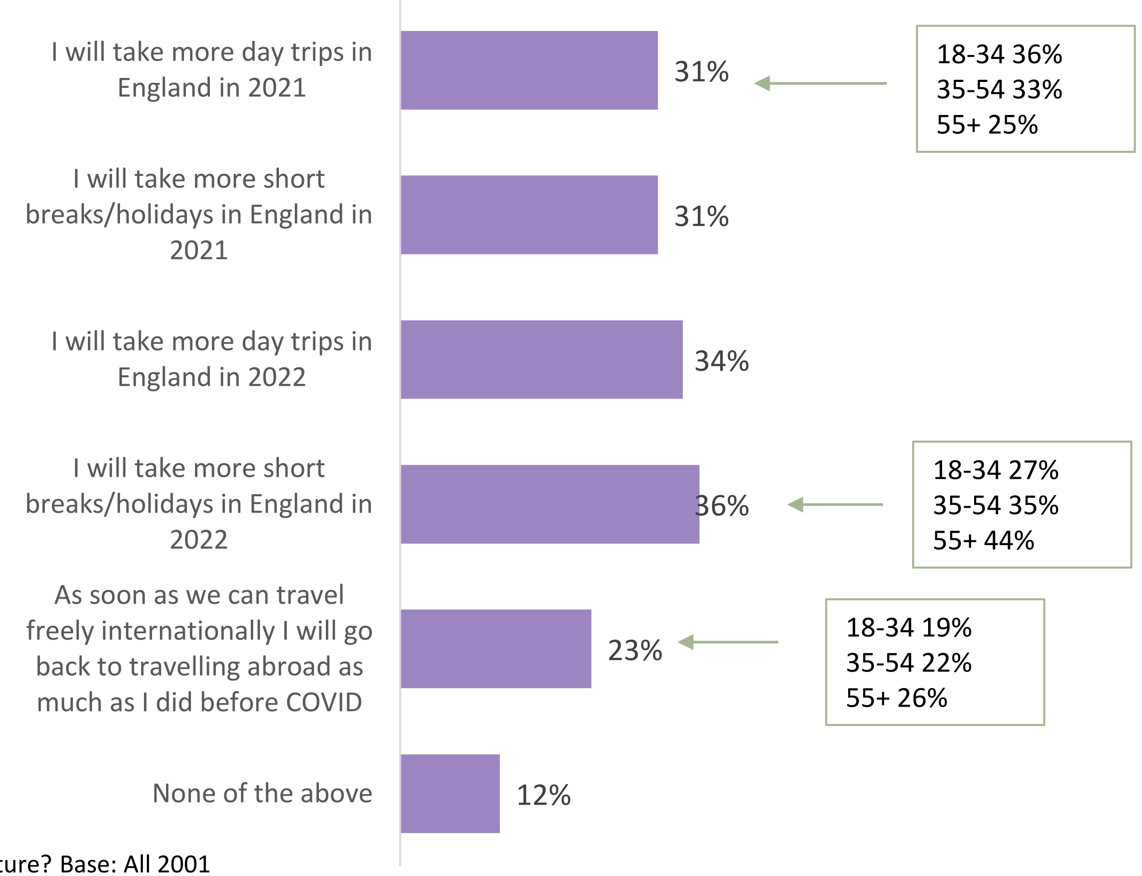
Three-quarters have changed their holiday plans and behaviours as a result of COVID. It is notable that whilst many believe those changes are short-term, a quarter believe the changes they have made will remain long into the future, suggesting there may be a continued uplift in demand for domestic short breaks, outdoor activities etc.



34% aged 55 years or over say their changed behaviour is long term.

53% of London residents and **55%** of Buzzseekers say their changes are short-term.

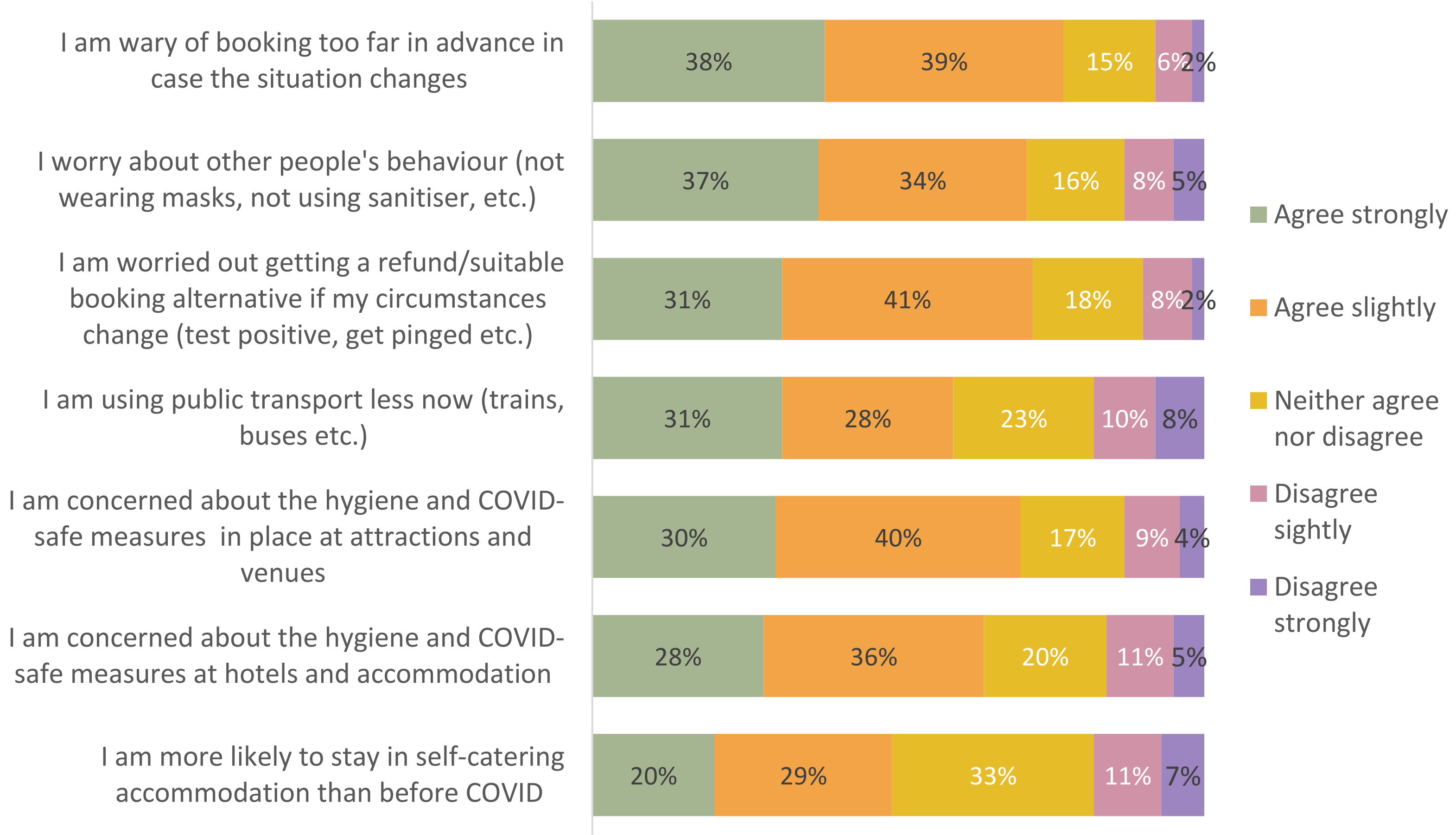
Similar to results seen in the VisitBritain COVID Recovery Tracker, there is an intention to take more domestic trips, both through this year and in 2022. However, there is also desire and intent to return to international travel as soon as possible for a quarter of survey respondents.



Q27 Which of the following statements apply to how the COVID pandemic has impacted your leisure travel plans for the future? Base: All 2001
Q29 Do you think any changes you have made to your leisure travel behaviour are long term/permanent changes, or do you think you will return to pre-COVID behaviours in a year or two? Base: All 2001

COVID

Three-quarters of people see advance booking as a concern and of most significance to the travel sector as it potentially makes forecasting and planning more challenging with a move towards more ‘last-minute’ bookings.



The wariness of advance bookings and worries about refunds could change the way people book, suggesting that the travel trade need to continue to be clear in refund policies and support late-booking options.
These concerns tend to be greater among women than men.

Public transport usage has declined for over half of people. Some of this will be connected by commuting and/or everyday travel. However, there is a small decline seen in intent to use public transport on leisure trips (see Transport Section for further details).

Hygiene concerns cut across all public settings, though as we return to a more ‘normal’ life, these concerns may well not convert into fundamental changes in behaviour.

The preference for considering self-catering accommodation is highest among young people.

Concerns driven by other peoples behaviour are highest among older people.

Q28 How much do you agree or disagree with each of the following statements that people have made about changes to their holiday behaviours in England as a result of the COVID pandemic? Base: All 2001

COVID-19 Timeline

March 2020	April 2020	May 2020	June 2020	July 2020	August 2020	September 2020	October 2020	November 2020	December 2020
Stay at home Lockdown begins All but essential travel banned All but essential retail closed All leisure & hospitality closed	Lockdown extended to June		School re-opens Shops and outdoor attractions re-open	Travel corridors opened Pubs re-open Spain removed from travel corridor Hotels and self-catering accommodation re-open Indoor attractions re-open	'Eat out to help out'	Rule of 6 gathering allowed 10ppm curfew	Tier system introduced across England with regional closures of shops, visitor attractions etc.	2nd National lockdown begins Non-essential shops close Vaccine developed.	Christmas is cancelled

January 2021	February 2021	March 2021	April 2021	May 2021	June 2021	July 2021	August 2021	September 2021	October 2021
National lockdown begins UK death toll reaches 100,000	Hotel quarantine begins for inbound arrivals Vaccine roll-out begins	Schools re-open	Hospitality sector re-opens with restrictions Shops and outdoor attractions re-open	Vaccine passports announced Indoor hospitality rules relaxed	Pilot large events held	COVID cases rise again Fully vaccinated travellers no longer need to isolate	Cases rise in England holiday resorts	Schools return	

Kent Perception Research

Domestic

February 2022

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Interreg France (Channel Manche) England EXPERIENCE

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EUROPEAN UNION

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