



Kent Perception Research

International
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 US, Germany, France and Spain.
The first sections provide the overall results of the research and the Deep Dive sections contain further supporting evidence

1. [Summary](#)
2. [Background](#)
3. [Respondent Profile](#)
4. [VisitBritain Segmentation](#)
5. [Awareness of Kent](#)
6. [Visitor Experience, Recommendation & Opinions of Kent](#)
7. [Purchase Journey & Motivations to Visit Kent](#)
8. [Perceptions](#)
9. [Immersive Experiences](#)
10. [Transport](#)
11. [Accommodation](#)
12. [Visit Duration](#)
13. [Covid-19 Impact](#)
14. [Sustainability](#)
15. [Brexit](#)
16. [Action Areas](#)
17. [Deep Dive Content](#)
 - [Competitor Counties](#)
 - [Opinions/Expectations of Kent](#)
 - [Kent Associations](#)
 - [Sources on Information](#)
 - [Immersive Experiences](#)



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 key international markets and the other based on the domestic opportunity. The following is a headline summary of the main findings contained within this report:

Awareness

- Awareness of Kent (and other counties) tends to be quite low, with people often knowing nothing more than the name. It is not dissimilar to awareness of other counties and is therefore a generic regional England challenge, rather than one that is specific to Kent.

Visitor Experience

- Visitors from the US, older people and more recent visitors are the most positive about Kent and other counties in England. Typically, people in Spain are the most positive of the European countries, though opinions are generally quite consistent.
- Satisfaction and recommendation levels for Kent are similar to those of the other counties included within the research
- Overall opinions of Kent are most positive for the history & heritage, the natural environment and the range of outdoor activities

Purchase Journey & Motivations to Visit

- Online search activity is key to the holiday planning, with review sites the second most mentioned source. Inbound travellers, particularly those who are older make good use of in-destination information (travel guidebooks, leaflets etc.)
- The importance of printed materials, particularly for France and Germany is of note
- A desire to explore Kent and the presence of special offers and discounts are important decision influencers, the latter particularly so among the Spanish
- Both package bookings and direct bookings are important for inbound visitors.

Insight & Implications

Perceptions

- Perceptions of Kent are generally positive and reflect the core strengths of the region:
 - History/heritage and the natural environment score highest
 - The countryside and historic buildings are cited as the main reasons to visit Kent. Beaches and variety of things to do, whilst important are not as prominent as they are in the domestic data, reflecting the lower level of knowledge of the region among inbound visitors
 - Imagery that most appeals are the Active & Outdoors and Exciting & Unexpected themes, with visitors from Spain more drawn by the History & Heritage
- Open descriptors are generally positive – beauty/landscape and history the most mentioned themes.
- With perceptions of Kent and other counties tested often quite similar across the inbound audiences, there is opportunity to further communicate Kent's USPs and specific offering to generate greater differentiation from the wider view of regional England

Experiences

- Immersive experiences provide a great opportunity to strengthen the perceptions of Kent among the inbound audience. Those that appeal most are ones that are easily understood and have clear potential to be unique to Kent. Generally, experiences have lower appeal among the German audience and may be reflective simply of cultural attitudes, rather than experiences not meeting German needs.

Insight & Implications

Transport

- Car is the most prevalent single form of transport for inbound visitors around Kent, but overall 42% will rely on public transport, private hire or organised coach tours

Accommodation

- Accommodation is an important element of the trip, and among visitors from Europe is typically rating 'very good' or 'good'.

Covid-19 & Brexit

- At the time of the research, some limitations to inbound visitor footfall appear set to remain, with both Brexit concerns and impact of Covid-19 on international travel influencing holiday considerations. Ongoing monitoring of trends will provide future insight on this

Sustainability

- Whilst around half of inbound travellers claim that environmental and sustainability factors influence their choice of holiday, the view is muted, tending to be 'quite' rather than 'very' important
- The priority areas tend to be around things that benefit the traveller directly; clean beaches and protection of the natural landscape in particular



Background



Research Objectives

This analysis is based on the quantitative research carried out in International markets

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 previous research
- 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 depth interviews in England

Note: The Covid-19 pandemic impacted the timing of the research, with the International fieldwork delayed while borders remained closed or subject to extended quarantine periods. The situation eased prior to fieldwork starting, but increased during fieldwork with the emergence of the Omicron variant.



Covid-19 travel restrictions from March 2020 mean that recent past experience of visiting England or Kent is limited and so much of the sentiment is based on assumption/expectation or historic knowledge.

Online fieldwork Wednesday 1st – Tuesday 21st December 2021.
US began 10 days in advance of Germany, France and Spain.

Focus on people who have visited England and/or Kent before and/or will visit Kent in future for leisure or to visit friends & relatives. Screened out those who have never heard of or visited Kent

Quotas set on gender and age

France 748

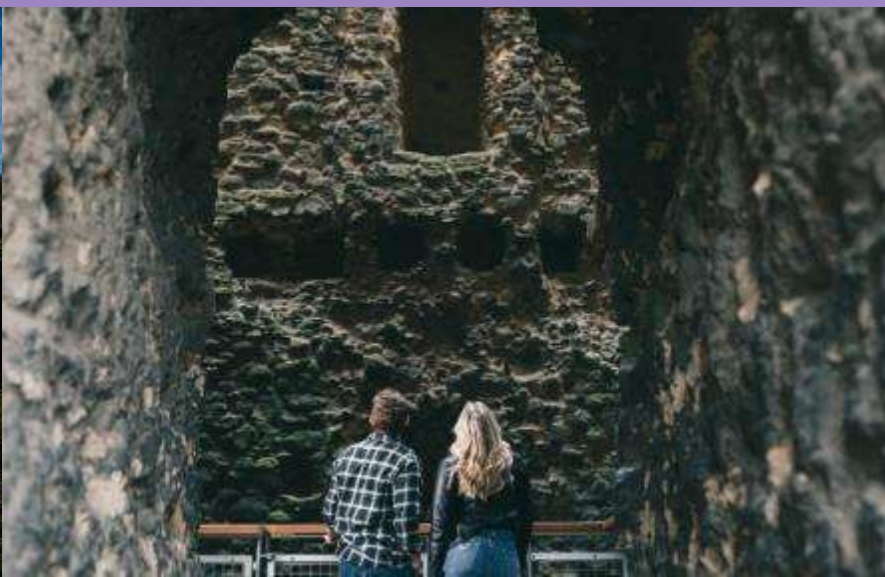
Spain 750

Germany 671

US 750



Respondent Profile



Respondent Profile

Sample in each country includes a consistent spread of age and gender. Incomes in Spain and France are lower than in Germany.

Gender	All Inbound	US	Germany	Spain	France
Base	2919	750	671	750	748
Male	48%	51%	47%	49%	45%
Female	52%	49%	53%	50%	55%

Age	All Inbound	US	Germany	Spain	France
18-24	12%	8%	13%	11%	18%
25-34	21%	25%	14%	21%	22%
35-44	27%	27%	26%	29%	27%
45-54	16%	15%	13%	16%	17%
55-64	17%	11%	26%	19%	12%
65-74	6%	10%	8%	4%	3%
75 or over	1%	2%	1%	<1%	<1%
NET Under 35	33%	34%	26%	32%	39%
NET 35-54	43%	43%	39%	45%	44%
NET 55+	23%	22%	34%	23%	16%

Household Income	US	Germany	Spain	France
Base	750	671	750	748
Low Income	18%	23%	41%	35%
Medium Income	40%	57%	49%	54%
High Income	40%	14%	5%	7%

Note:

Low income = US <\$25,000, Europe <€25,000

Medium income = US \$25,000 - \$74,999, Europe € 25,000 - € 74,999

High income – US £75,000+, Europe €75,000+

Q1: Are you: Base: All respondents (2,919)

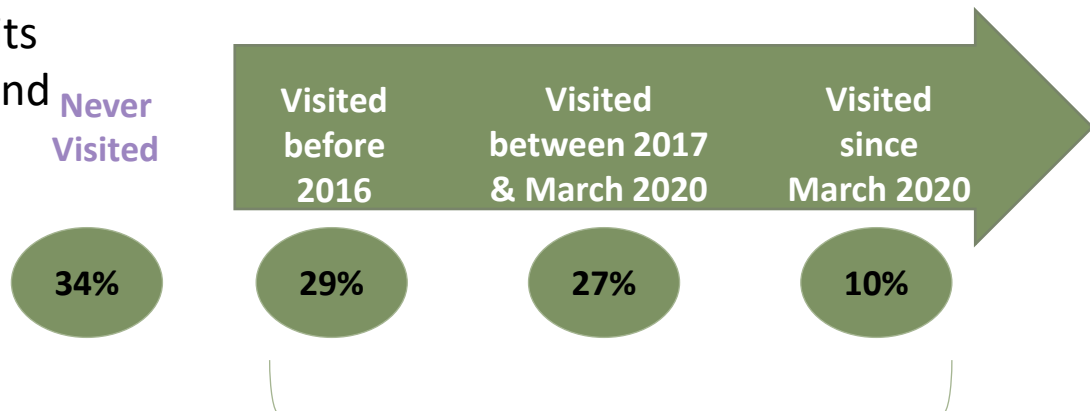
Q2: Which of the following age categories do you fall into? Base: All respondents (2,919)

Q60 What is your annual household income? All respondents (2,919)

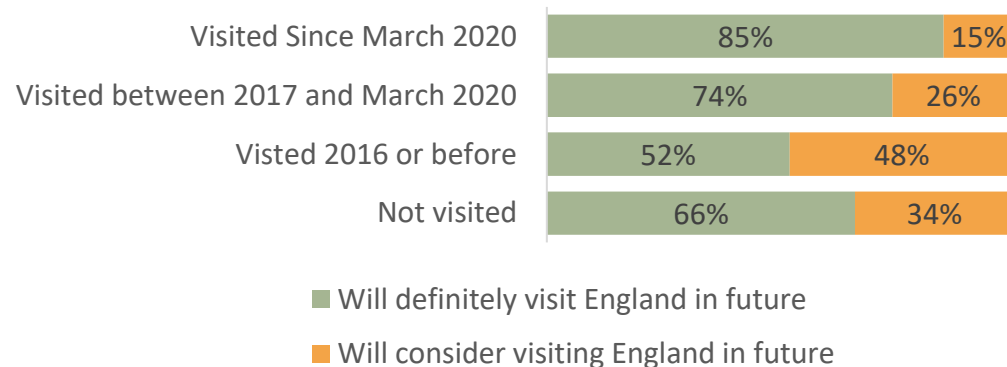
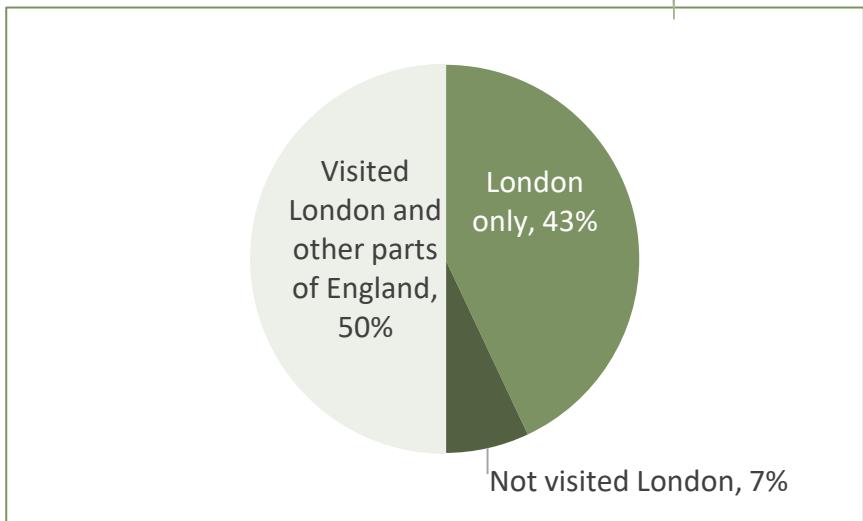
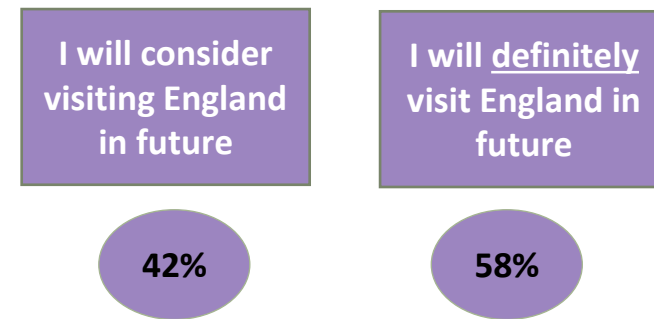
Sample Profile: Visiting England

The impact of Covid-19 on international travel in 2020/2021 can be seen in the small volume of recent visitors. The importance of London can also be seen with 93% of visits including London. Recent visitors are the most likely to be returning to England in future.

Past Visits to England



Future Visits to England

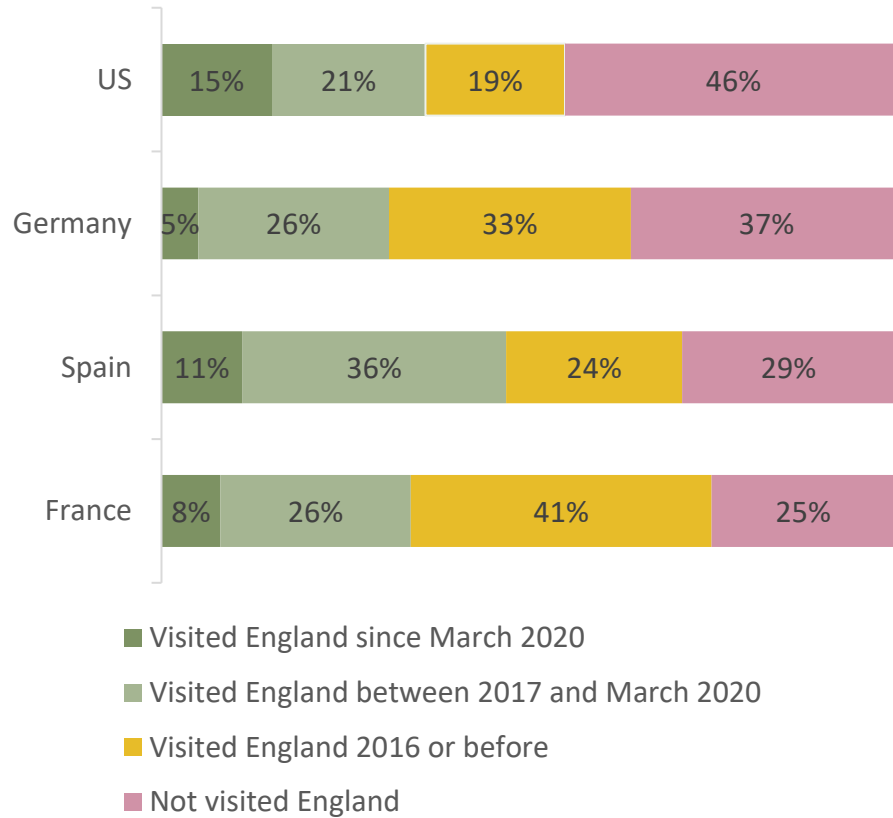


Q5 Which of these statements best describes your experience of visiting England in the past, whether for a short leisure trip or vacation including visiting friends or relatives (day trip or staying for one night or more)? Base: All respondents (2,919) Q5a When you have visited England has that been a visit to London or to other parts of the country? Base: All respondents that have ever visited England (1,925) Q6 Which of these statements best describes your likelihood to visit England in the future, whether for a short leisure trip or vacation including visiting friends or relatives (day trip or staying for one night or more)? Base: All respondents (2919)

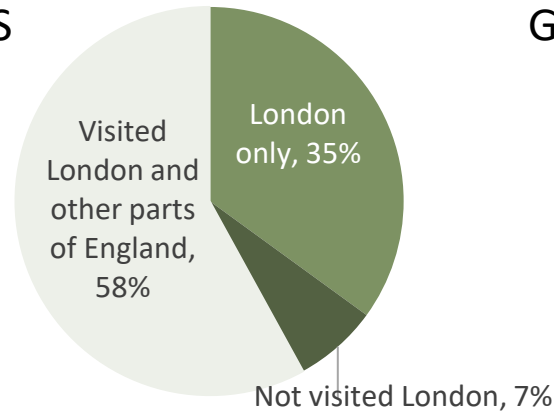
Sample Profile: Visiting England

Just over half of the US sample have visited England before, increasing to three-quarters of the French sample. London is almost always visited from all countries.

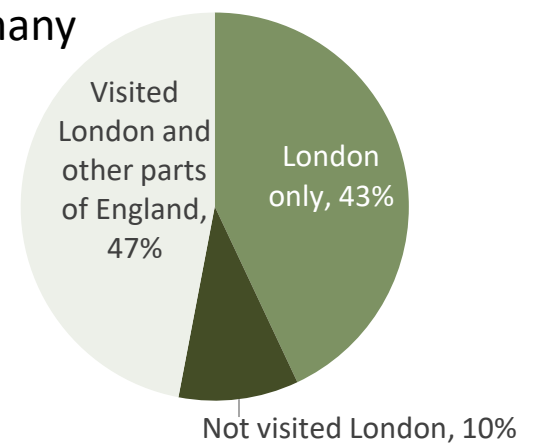
Past visits to England



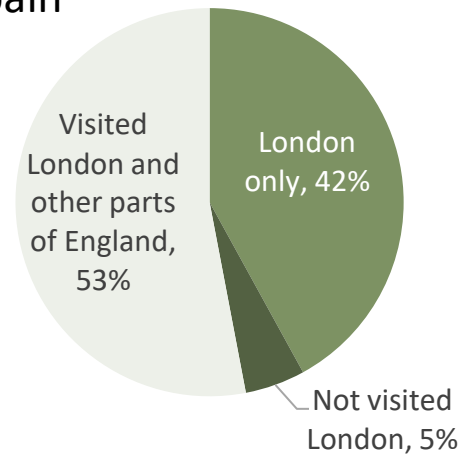
US



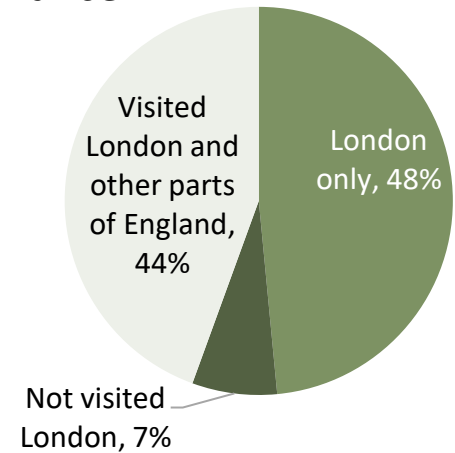
Germany



Spain



France



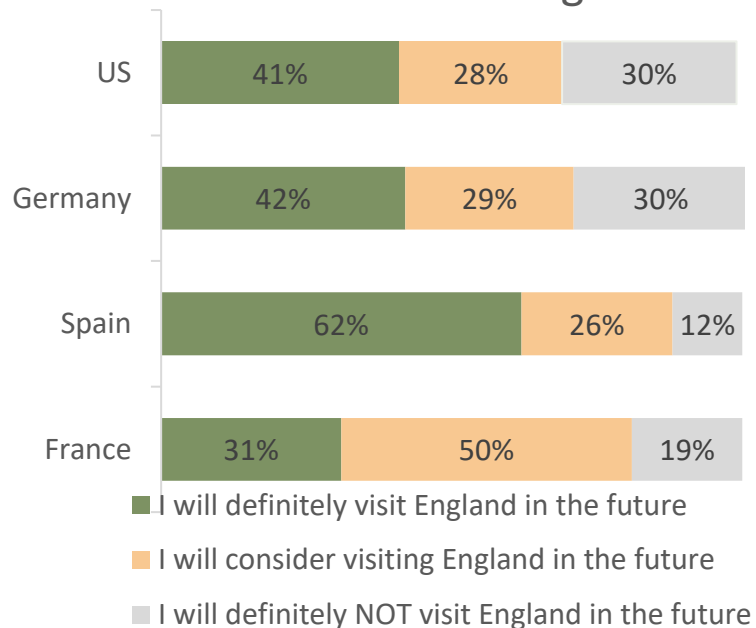
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Barriers to visiting England

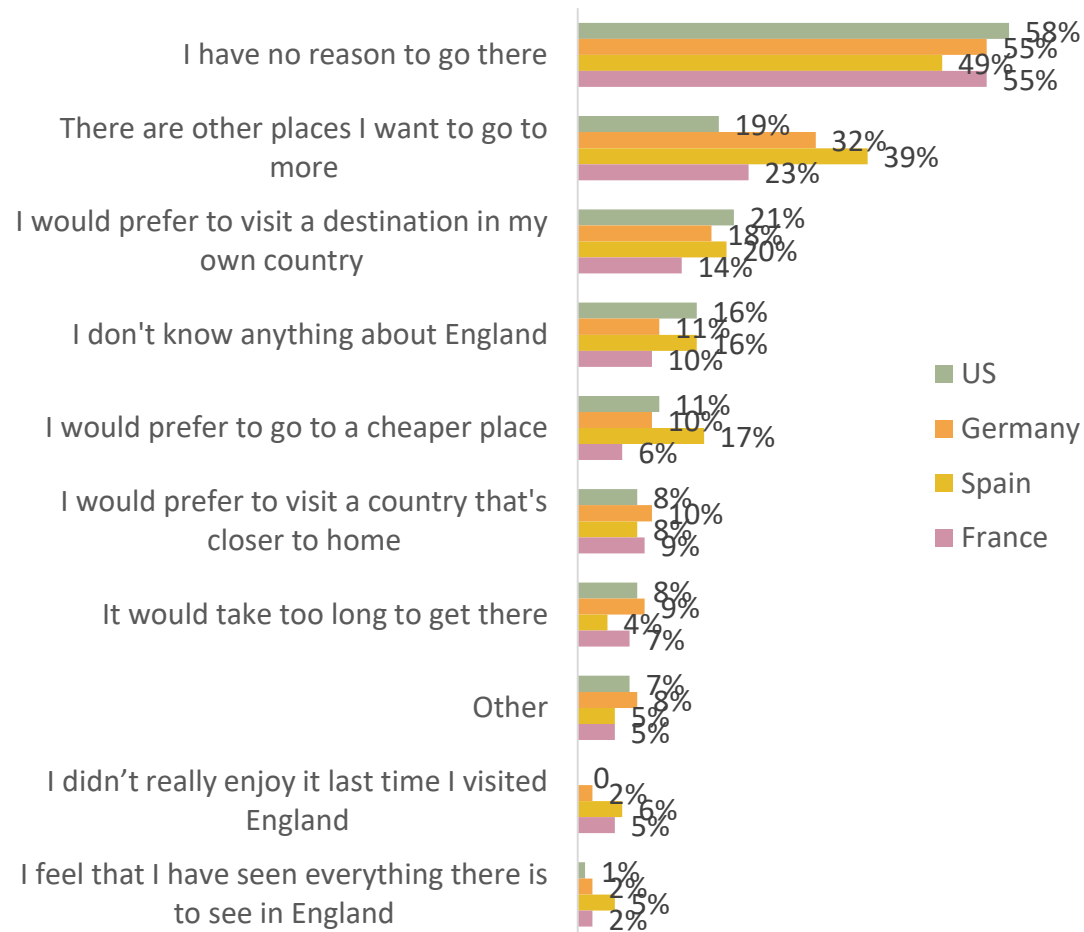
Spain had the lowest number of rejectors to visiting England in future, indicating it is a market with big potential. Barriers to visiting are quite passive with lack of reason to visit and other places are more appealing

The survey screening process excluded people from the main survey who would not visit England/Kent in future. Before closing the survey they were asked their reasons for not visiting in future.

Future visits to England



Reasons for not visiting England in future

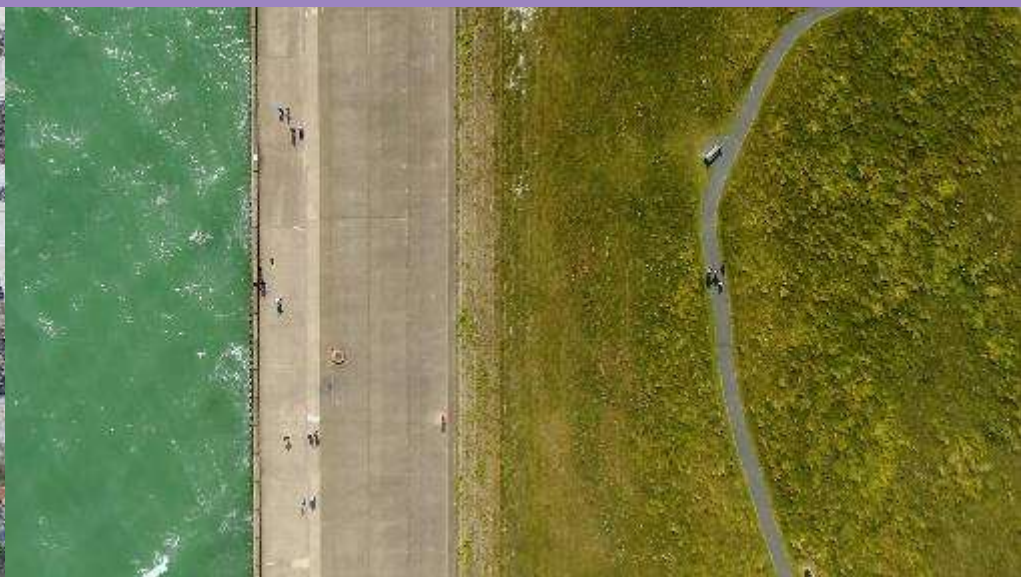


Q6 Base: All respondents including screen-outs(4129)

Q7 Base: All respondents that won't consider visiting England in the future (Screen-outs only: 964)

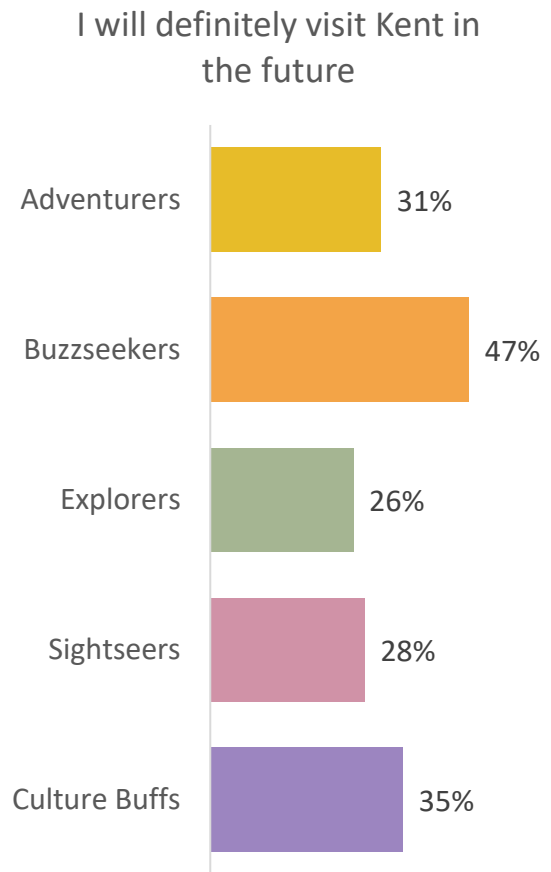
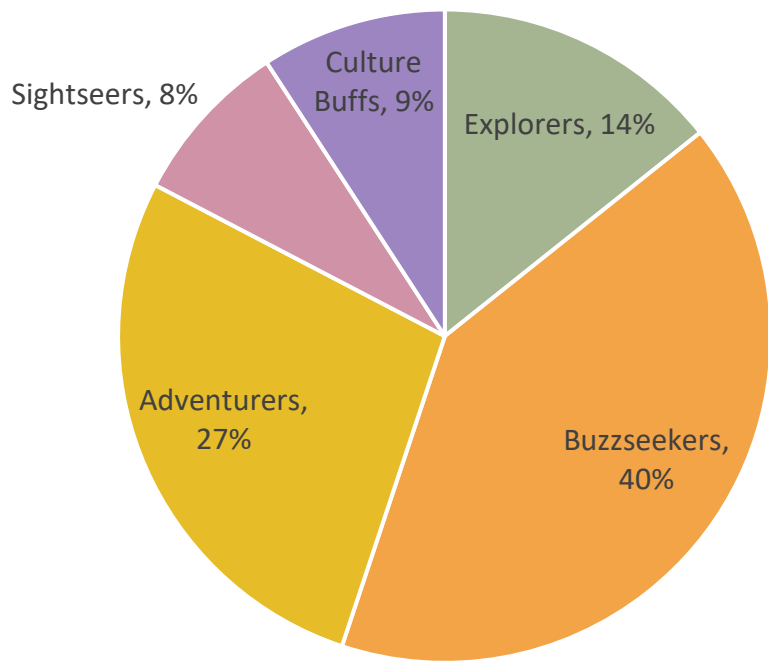


VisitBritain Segmentation



Segmentation

The majority of people taking part are Buzzseekers and Adventurers. These two segments and Culture Buffs are the most likely to definitely visit Kent in 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 (2,919)

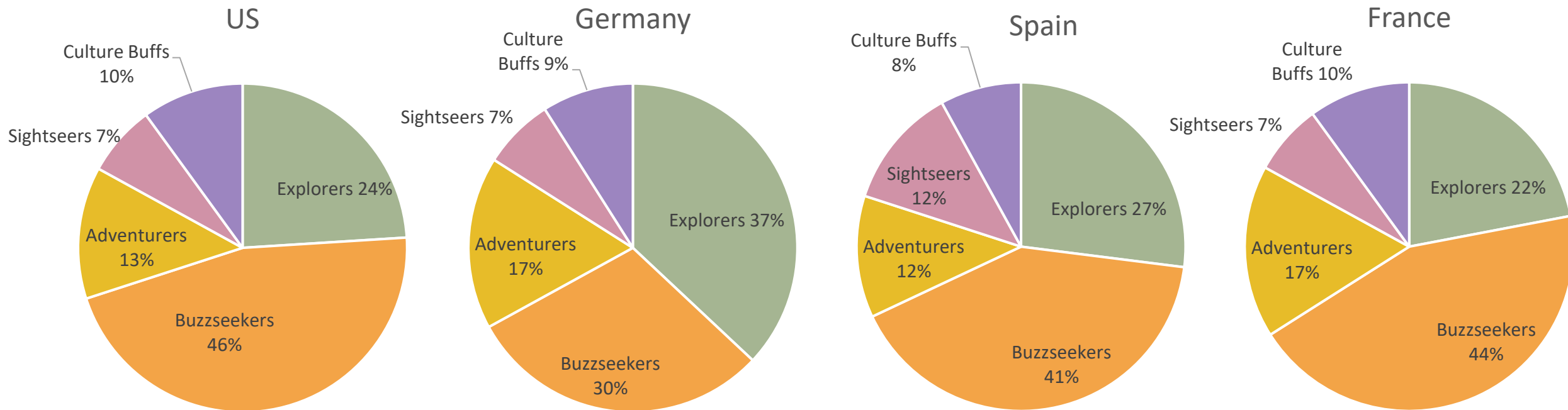
Q6 – Which of these statements best describes your likelihood to visit Kent in the future, whether for a short leisure trip or holiday including visiting friends or relatives (day trip or staying for one night or more)? Base: All respondents (2,919)

VisitBritain Segmentation

Segment	Global Size Estimate	Profile Headlines
Adventurers	16%	Older, 67% aged 45 years+ Enjoy travelling off the beaten track Like spending time outdoors in nature Seek out new experiences
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
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

Segmentation

A larger proportion of the sample from Germany are Explorers (less Buzzseekers), otherwise segment sizes are quite consistent across all markets





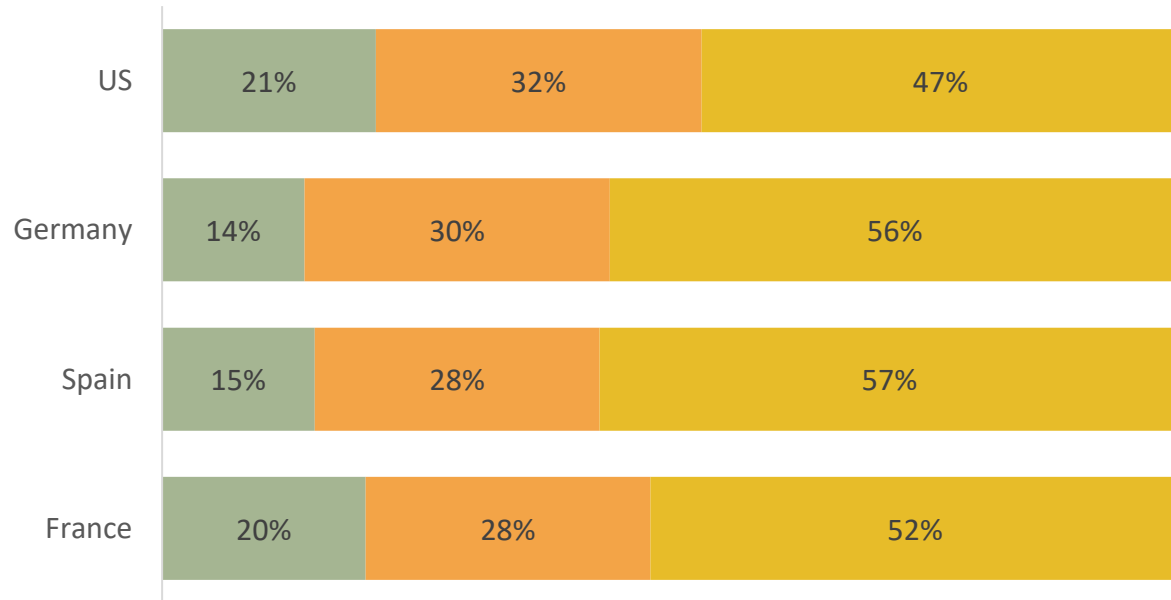
Awareness of Kent



Familiarity

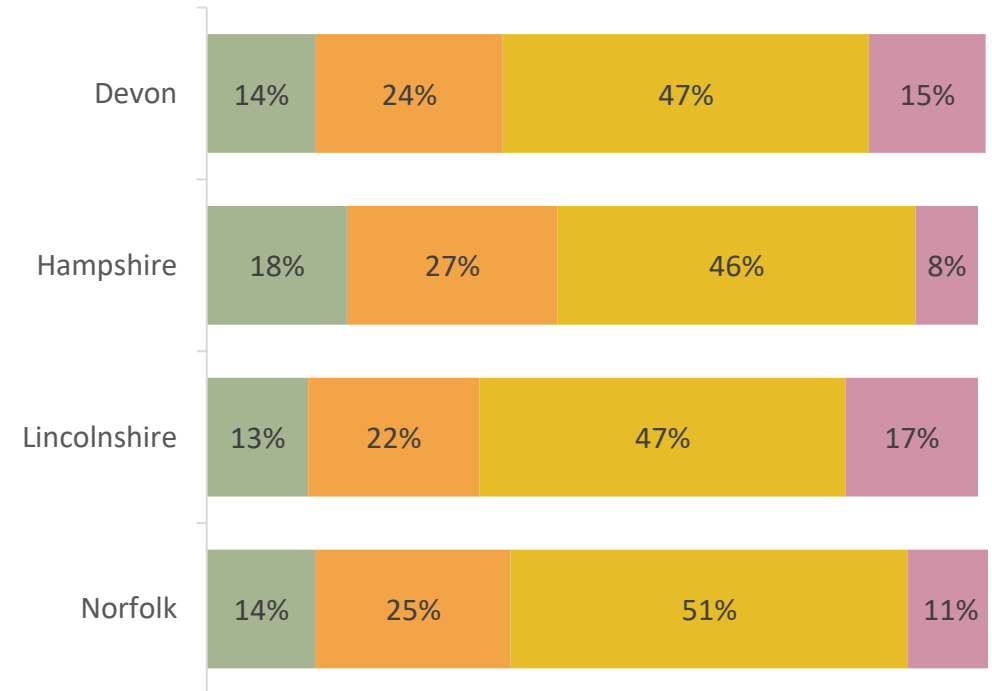
Higher incidence of visiting among those from the US and from France.
Among other counties, Hampshire has the highest awareness among inbound visitors

Kent



NOTE: Kent is not directly comparable with the other markets because if they hadn't heard of Kent they screened out.

Familiarity - all markets



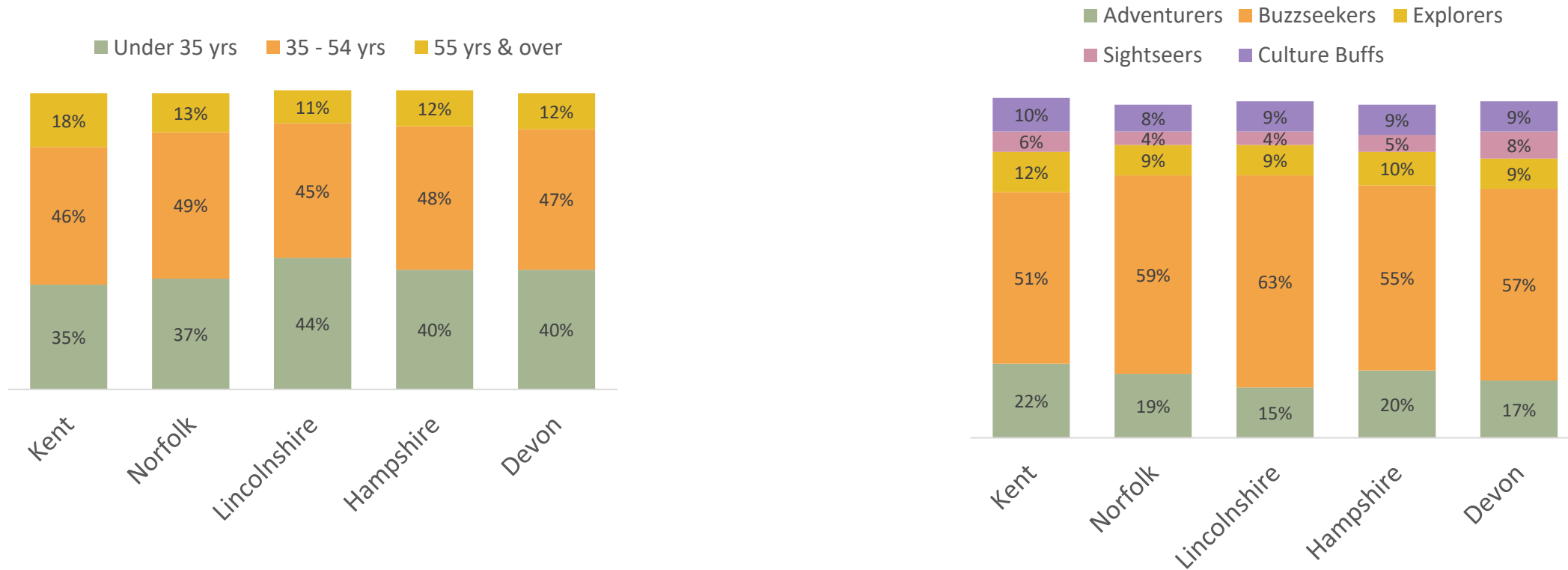
- Have visited in the past
- Heard of and know something about
- Heard of, but know nothing about
- Never heard of

US past visits are higher for all counties

Past Visits to Kent

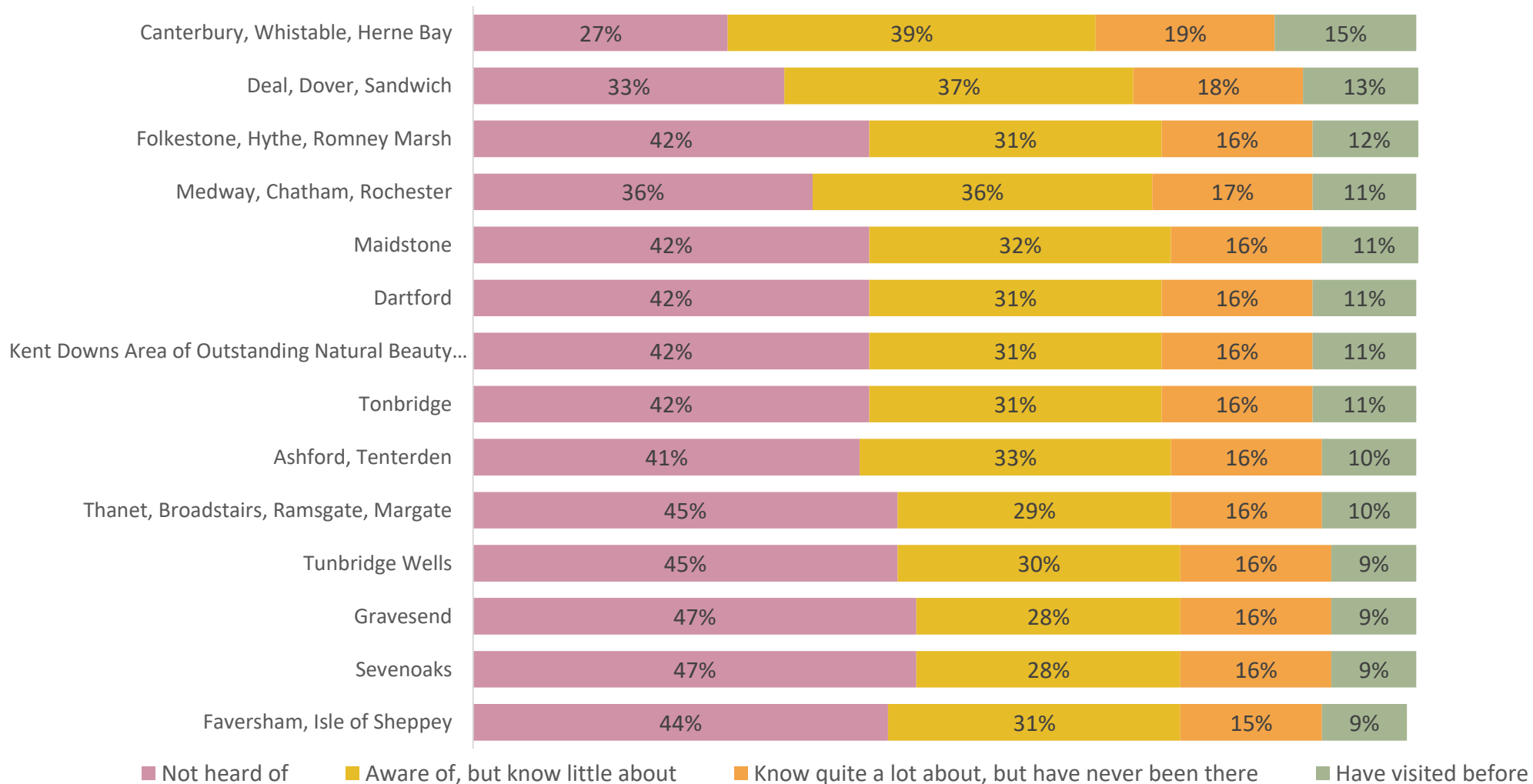
The Kent visitors are a little older than those to other counties and there is opportunity to increase the share of Buzzseekers.

- Among those who have visited Kent before typically around half have also visited one or more of Norfolk, Lincolnshire, Hampshire and/or Devon
- The profile of the Kent visitor within this research, is slightly older than visitors to other counties and this is reflected in a higher incidence of Explorers and Culture Buffs. Kent has the highest incidence of Adventurers and the lowest of Buzzseekers



Familiarity

Knowledge of places within Kent is limited, with Canterbury most well-known and then ports of Dover and Folkestone.





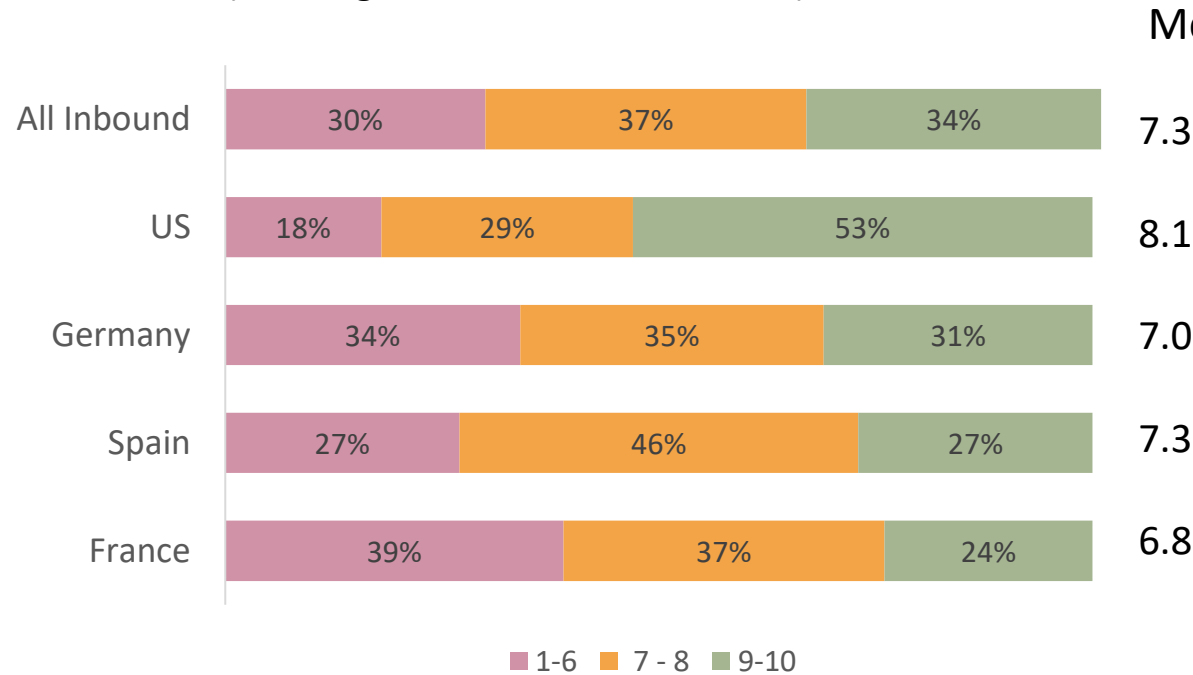
Visitor Experience, Recommendation & Opinions of Kent



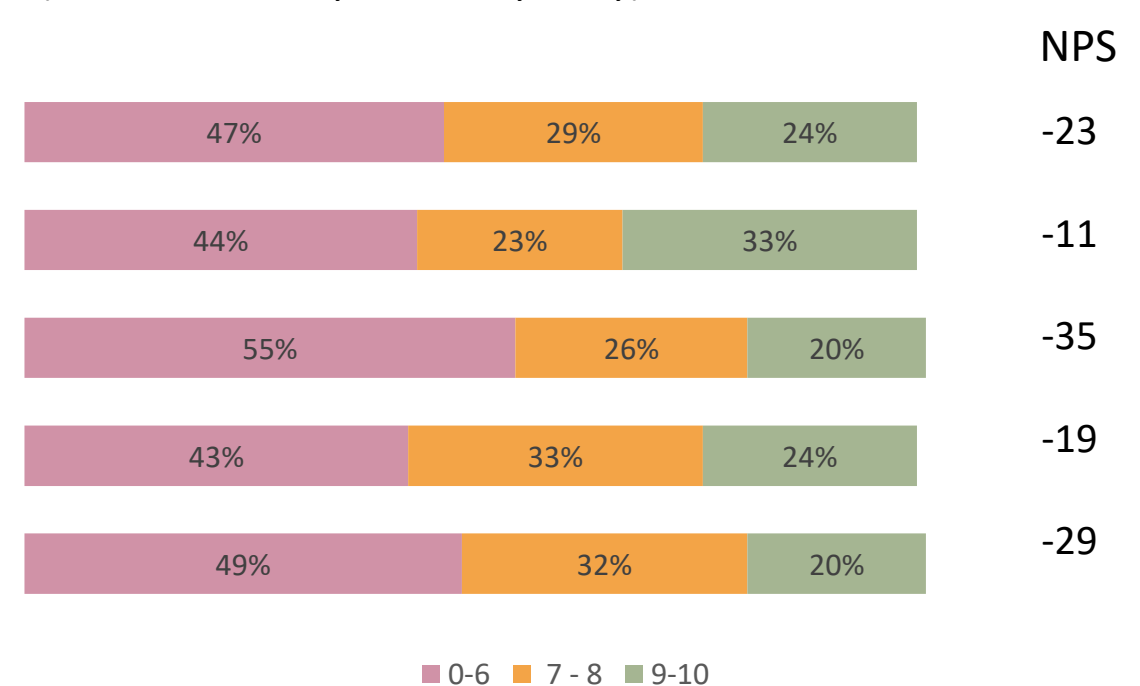
Overall Experience & Recommendation of Kent

Overall experiences of Kent are mixed. Visitors from the US are most positive and from France the least so. Net Promoter Scores (NPS)* are negative across all international markets, suggesting that there is an opportunity to increase the appeal of Kent everywhere.

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



Recommendation & Net Promotor Score for Kent
(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 county for a leisure trip or holiday: Total (1,229), US (309), Germany (240), Spain (339), France (341)

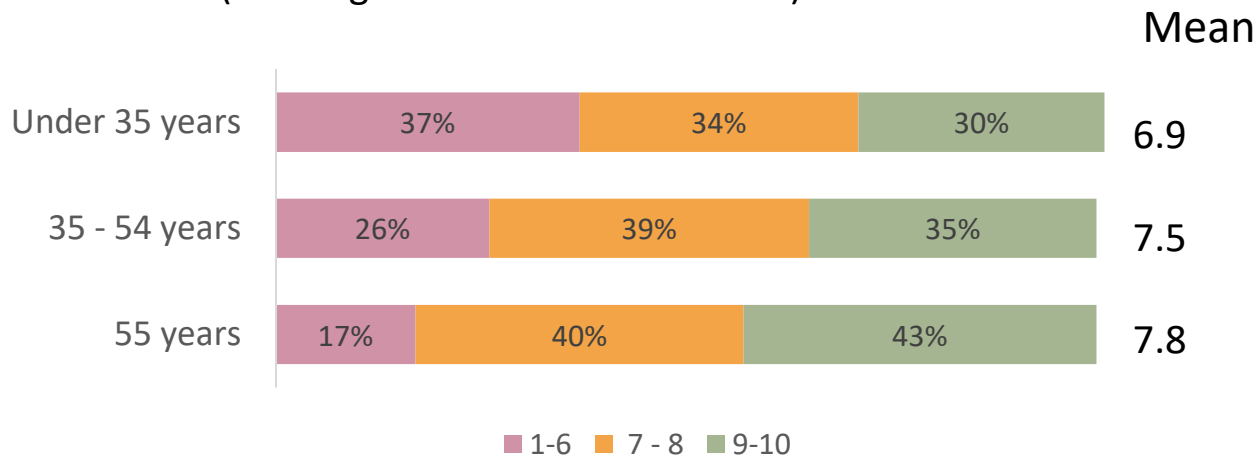
Q20 And how likely is it that you would recommend a holiday or short trip to Kent to a friend or colleague? Base: All: Total (2,919) US (750), Germany (671), Spain (750), France (748)

*Note: NPS is calculated by % promoters minus % detractors

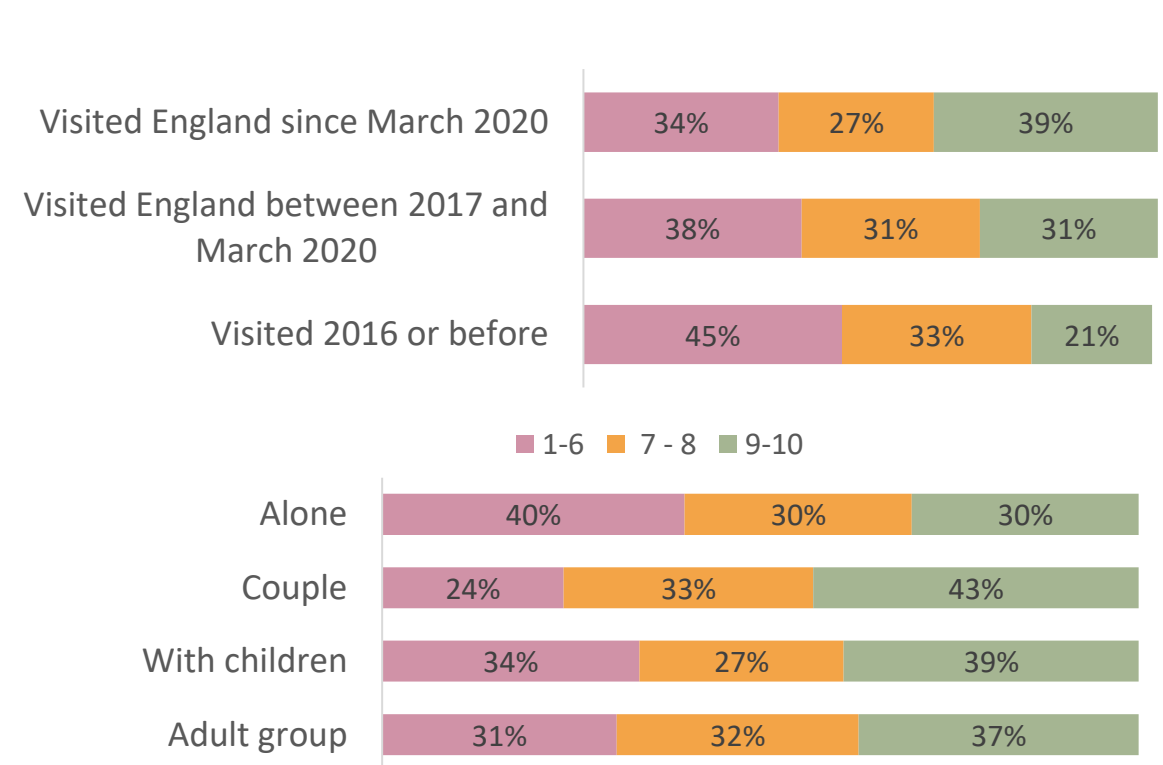
Opinion and Recommendation of Kent

Older people are more positive about their experience of Kent, though levels of recommendation are similar across all age groups. Those with recent experience of England are more likely to recommend Kent.

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



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



Visit duration has little impact on satisfaction or recommendation. Those visiting as a couple are generally more positive about their experience, aligning also with their older age profile

Q19 Thinking back to your most recent trip to Kent, how would you rate your experience overall? Base: all who have visited county for a leisure trip or holiday: Total (1,229), US (309), Germany (240), Spain (339), France (341)

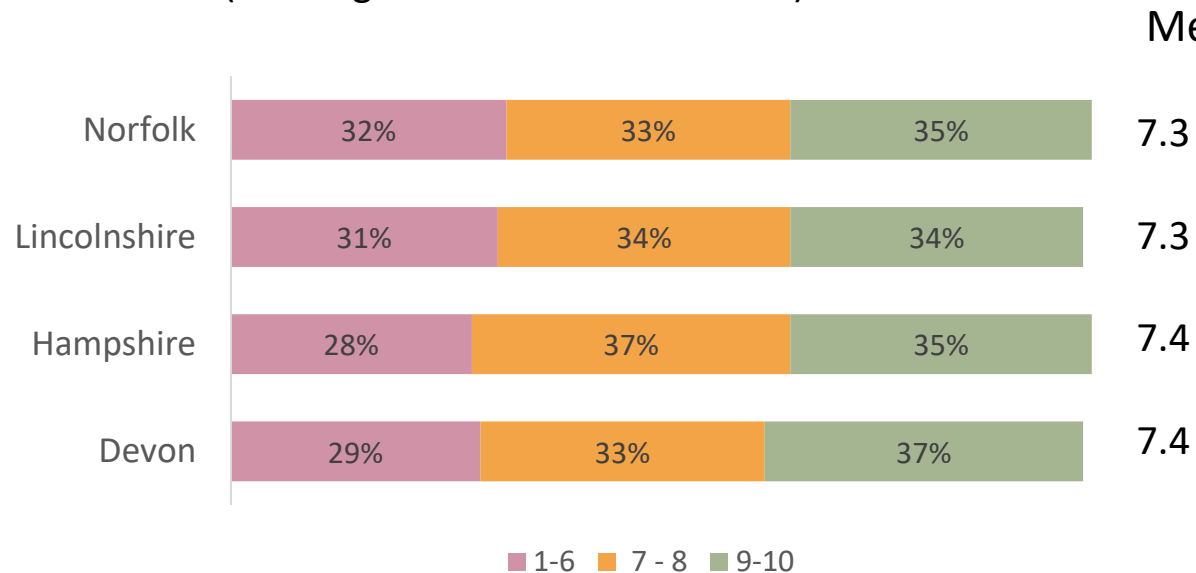
Q20 And how likely is it that you would recommend a holiday or short trip to Kent to a friend or colleague? Base: All: Total (2,919) US (750), Germany (671), Spain (750), France (748)

Note: NPS is calculated by % promoters minus % detractors

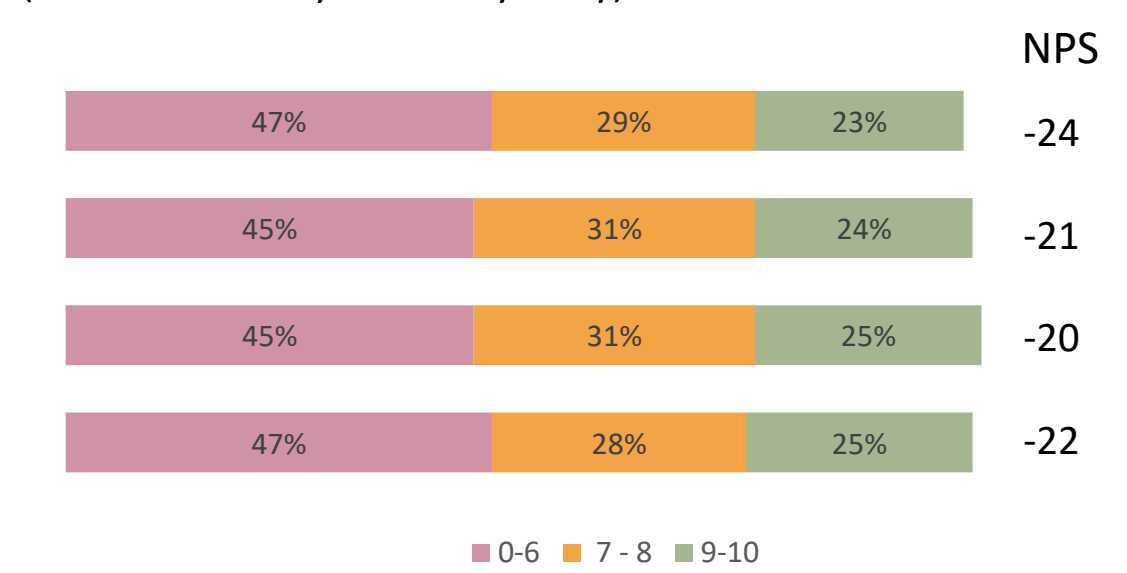
Overall Experience & Recommendation of other counties

Satisfaction levels are similar for other counties and Net Promoter Scores (NPS)* are again all negative. As with Kent, more recent visitors, older people and those travelling as couples tend to be the most positive about their experience.

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



Recommendation & Net Promotor Score for other counties
(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 (1,229), Devon (1,459), Hampshire (987), Lincolnshire (905), Norfolk (989).

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 (2919)

*Note: NPS is calculated by % promoters minus % detractors

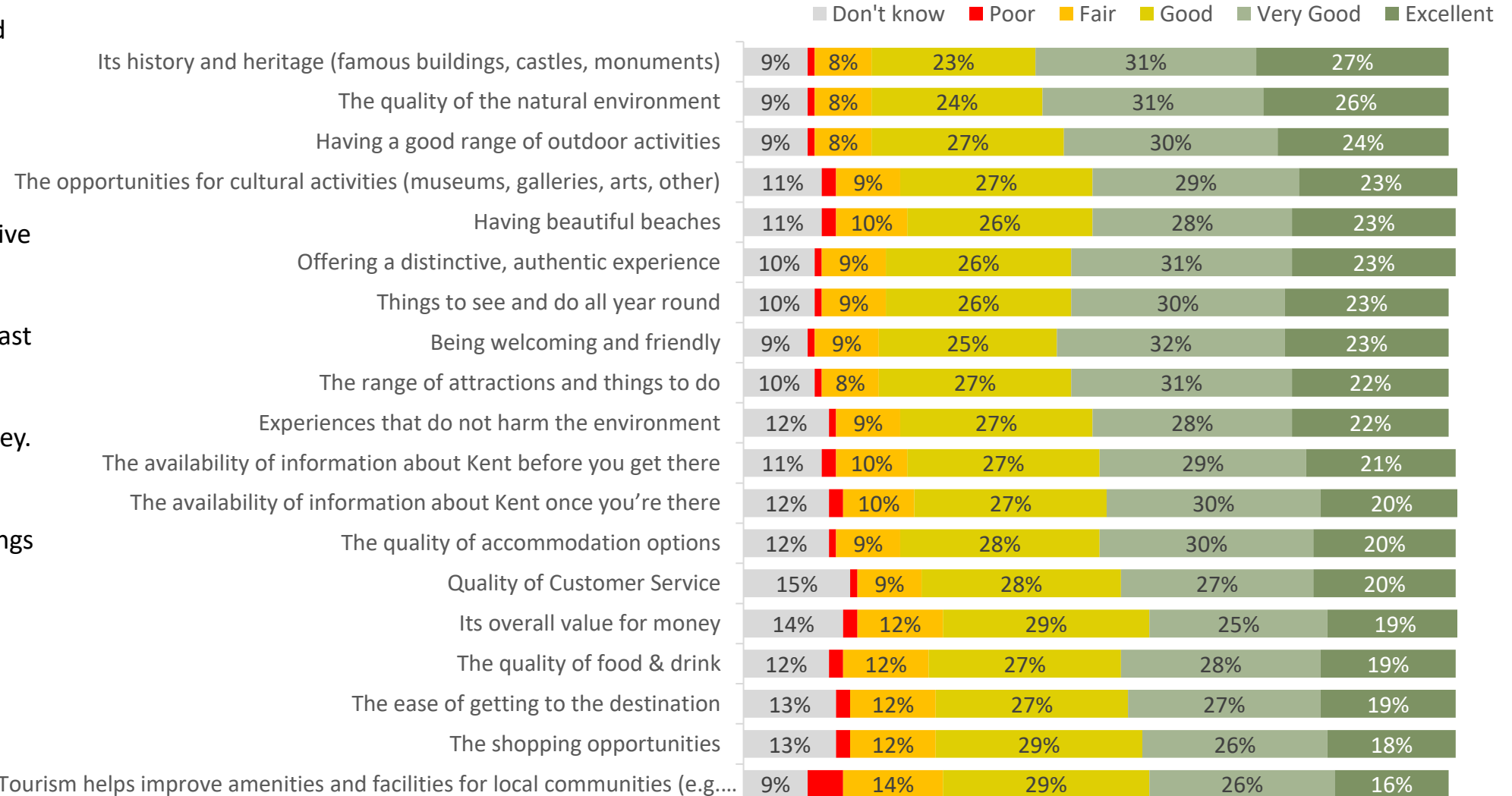
Opinion/Expectations

History, heritage and the natural environment are most likely to be rated excellent. Combining those who say 'excellent' and 'good' brings 'welcoming & friendly' to the fore as a strength of Kent.

- Food & drink, shopping and ease of getting to Kent are areas for improvement in international perceptions.
- Visitors from US are most positive about Kent, in particular around the positive impact of tourism.
- Compared to other age groups, older people are least positive about Kent, particularly around the beaches and value for money.
- Buzzseekers are the most positive about Kent, particularly on range of things to do and environmentally positive experiences.

Note: chart ordered % saying 'Excellent'

Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
Base: all respondents (2,919)



Opinion/Expectations

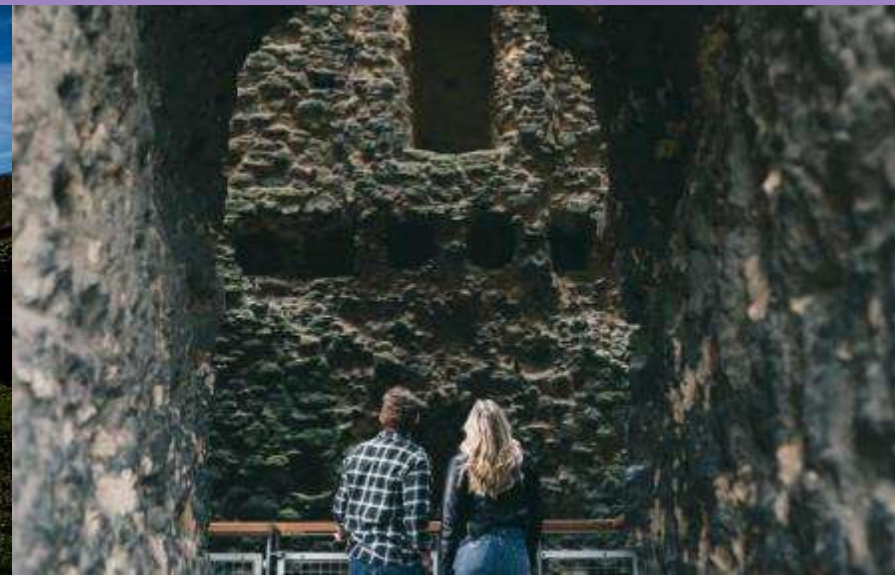
Views are quite consistent between domestic and inbound visitors. Inbound visitors are relatively more positive about the authenticity, the range of experiences/activities and the welcome, while domestic over-index on the food & drink and tourism's local impact



Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
 Base: all inbound respondents (2,919) Q37 all Domestic respondents (2,001)

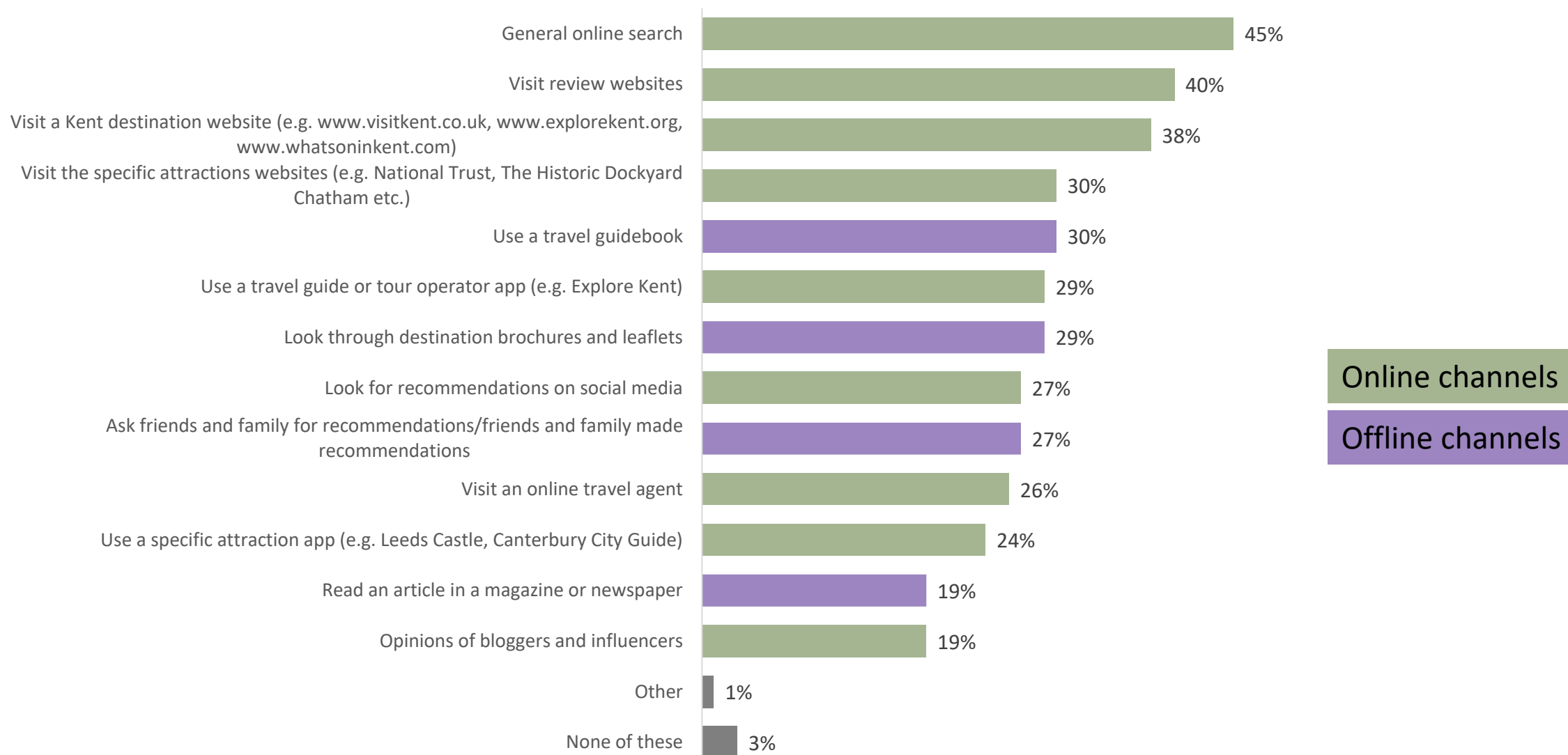


Purchase Journey & Motivations to Visit Kent



Sources of Information

As with domestic travellers, online sources are vital for potential inbound visitors seeking out information, with the top four sources all online. Recommendation is less important internationally.



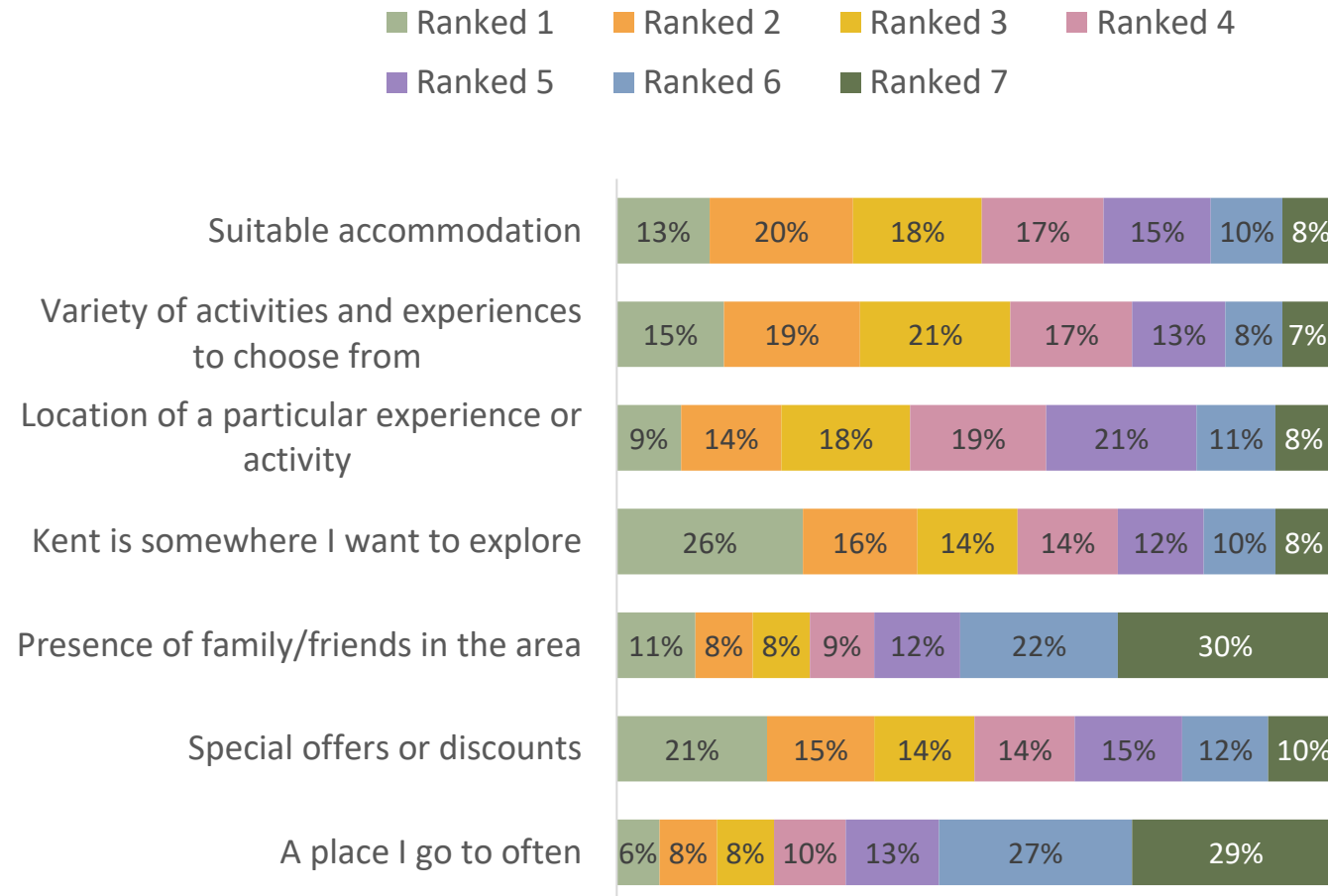
General search is most prevalent in all countries. With destination websites and review sites also important. Visitors from France and Germany also use off-line sources of travel guidebooks and destination brochures/leaflets.

US	Germany	Spain	France
1. General online search	1. General online search	1. General online search	1. General online search
2. Visit a Kent destination website	2. Visit a Kent destination website	2. Visit review websites	2. Visit review websites
3. Visit review websites	3. Visit review websites	3. Visit a Kent destination website	3. Use a travel guidebook
4. Visit the specific attractions websites	4. Use a travel guidebook	4. Visit the specific attractions websites	4. Visit a Kent destination website
5. Use a travel guidebook	5. Look through destination brochures and leaflets	5. Ask friends and family for recommendations	5. Look through destination brochures and leaflets

- Older people tend to do more research, particularly through offline channels. As might be expected, younger travellers make more use of social media and bloggers. This is reflected in Adventurers generally doing more research.
- Buzzseekers are more likely than any other segment to look for recommendations on social media and, along with Culture Buffs, read articles in magazines or seek opinions of bloggers.
- Those who visited England in 2016 or earlier are more reliant on general online search, while those who visited since March 2020 are more likely to seek out recommendations from friends /family or read articles in magazines. This may be reflective of the differing travel behaviours seen during Covid-19.

Importance of Decision Influencers

Desire to explore Kent tops the decision influencers, with special offers and discounts second most likely to be ranked first



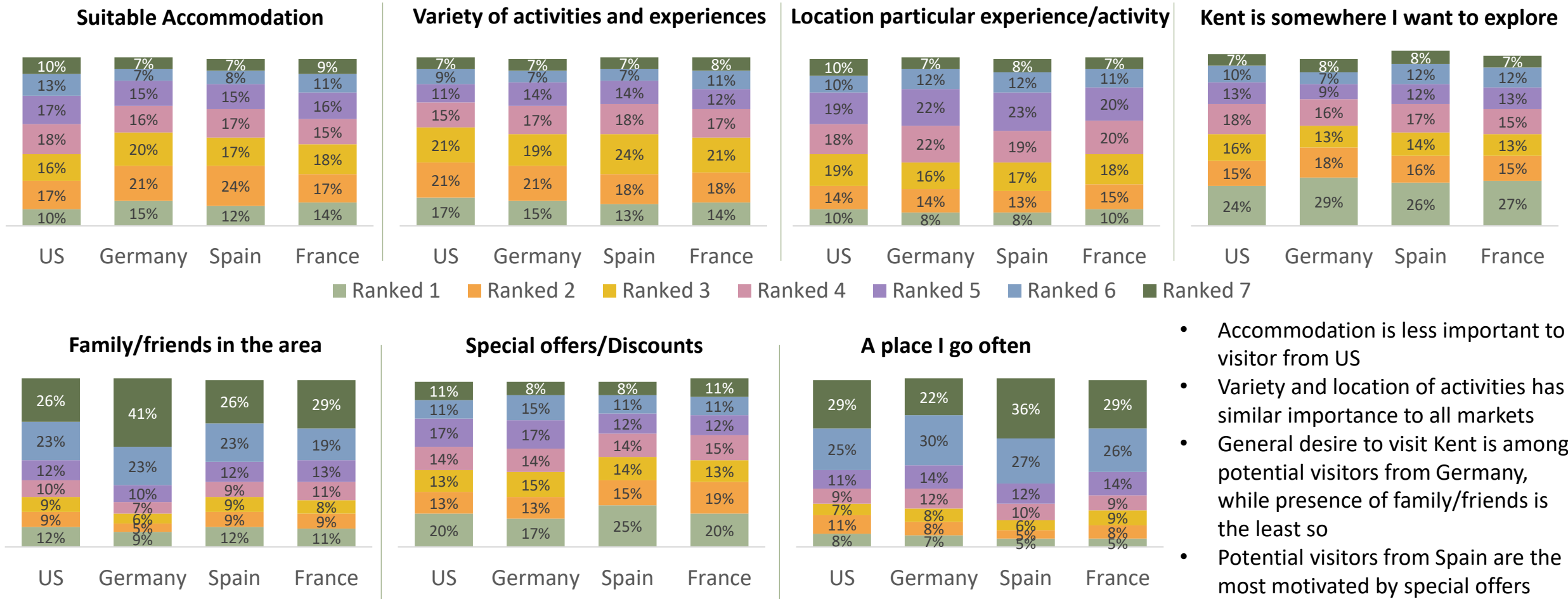
- Suitable accommodation is more important for those who visited England in 2016 or earlier or have not visited before. It is also more important among those taking short breaks, people travelling alone and the Explorer segment
- Variety of activities is a greater decision influencer among those planning a longer stay and among the Adventurer segment
- Location of activities is more important to young people, those travelling in a group (with or without children) and people planning an off-peak visits
- Desire to visit Kent is strongest among those over 55 years and the Adventurer segment
- Under 35's are more likely to be influenced by the presence of friends/family as are those travelling alone
- Women are more likely than men to be influenced by special offers or discounts. Deals are also more important to those aged 35 and over and to those who have not visited England before. Explorers are the most deal-sensitive segment.
- Men are more likely than women to place importance on past visits, as are those who previously visited England for a holiday of 4 or more nights.

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 2,919

Importance of Decision Influencers

Some differences across markets in terms of most important decision influencers.



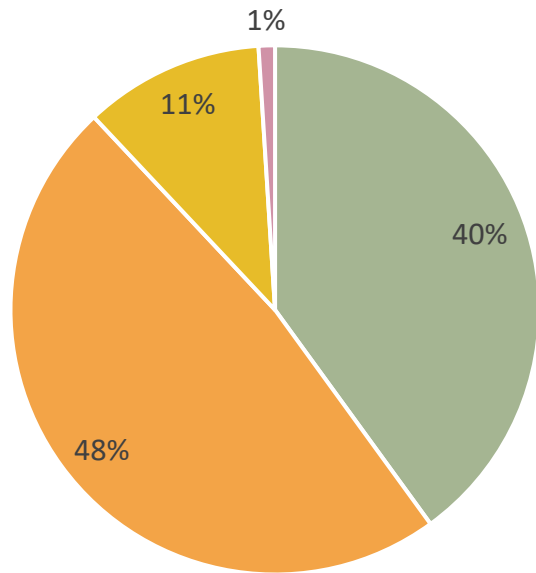
- Accommodation is less important to visitor from US
- Variety and location of activities has similar importance to all markets
- General desire to visit Kent is among potential visitors from Germany, while presence of family/friends is the least so
- Potential visitors from Spain are the most motivated by special offers and discounts
- Repeat visits are generally not decision influencers, particularly among people in Spain

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 2,919

Booking Behaviour

There is an almost equal split between independent travellers and those who book a package. Visitors from Spain are least likely to book directly with providers.

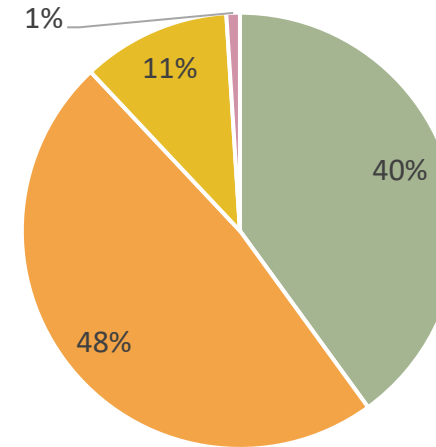
International



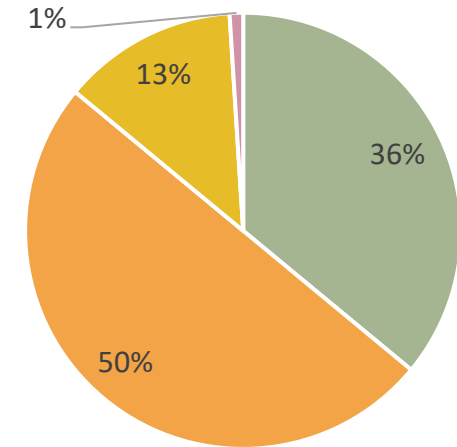
- Those who visited England during Covid-19 are more likely to book directly with accommodation and activity providers, perhaps reflecting their greater independence and confidence.
- Younger people, and the more affluent are more likely to book directly with providers
- Older people (55 years+) are most likely to book their trip as a package
- There are no differences across types of visitor groups, or between longer or shorter stays.

- I would book the accommodation and activities directly with the providers
- I would book a package with a provider that included travel, accommodation and activities
- I will be staying with friends/family so will arrange directly with them
- Other

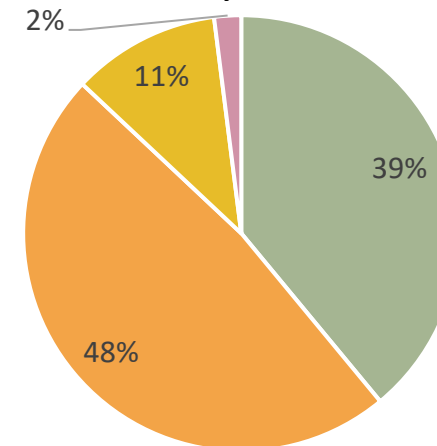
US



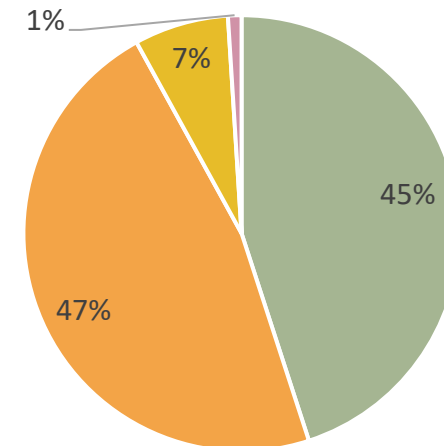
Spain



Germany

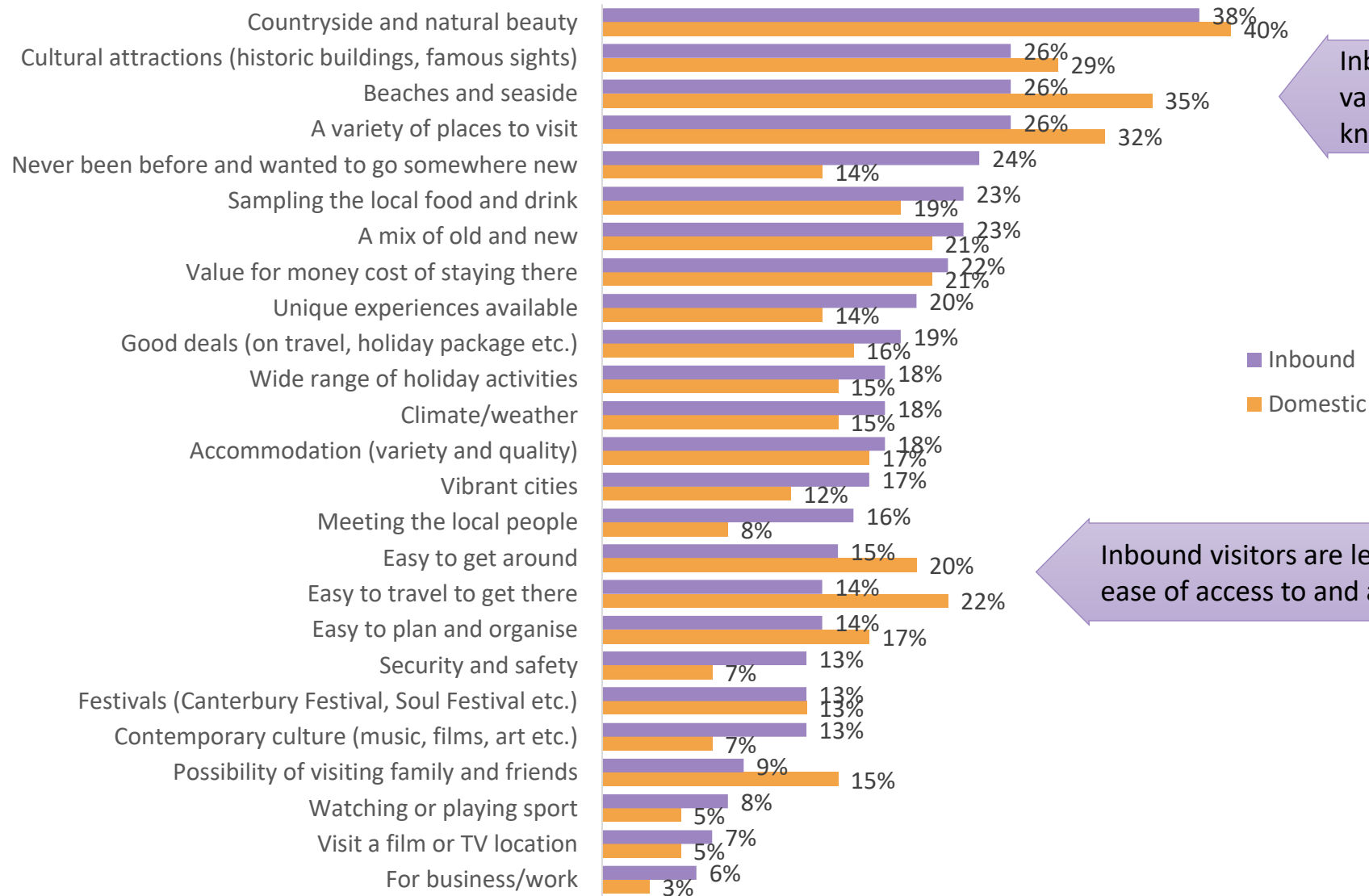


France



Reasons to visit Kent

Countryside is the top reason by a significant margin for inbound visitors, suggesting perhaps a lack of knowledge or understanding of the wider Kent offer



Inbound visitors are less aware of the beaches & variety of places to visit, reflecting lower level of knowledge of Kent.

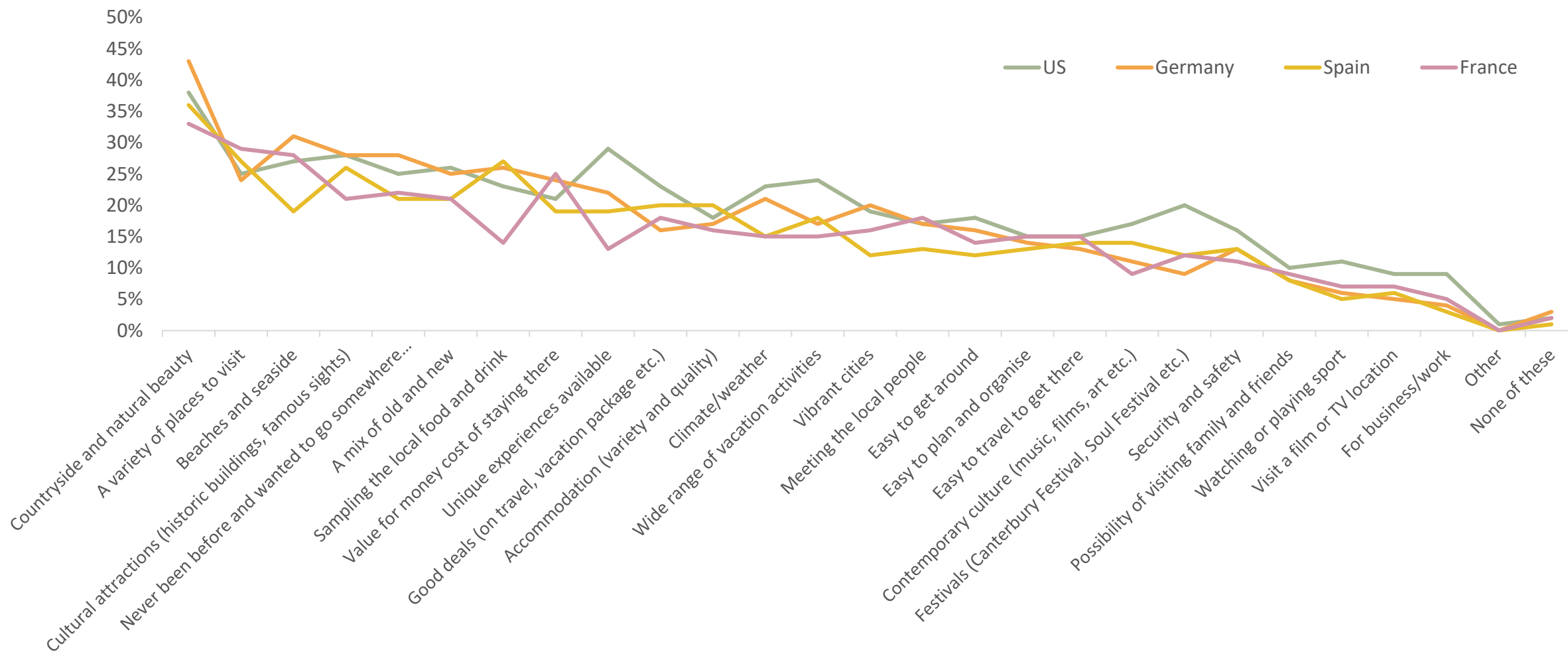
For inbound visitors the uniqueness of Kent (or England?) are more motivating than for the domestic audience:

- Visiting somewhere new
- Sampling local food & drink
- Availability of unique experiences
- Meeting local people

Inbound visitors are less positive about ease of access to and around Kent

Reasons to visit Kent

Reasons to visit Kent are quite consistent across inbound markets. The US is more likely to be driven by the range and uniqueness of activities and festivals. The countryside is very important to the German audience. The French are less interested in value for money and the local food and drink. The Spanish have relatively limited interest in the beaches.



Inspiration to Visit Kent

Active & Outdoors



Food & Drink



History & Heritage



Arts & Culture



Wellbeing



Exciting & Unexpected



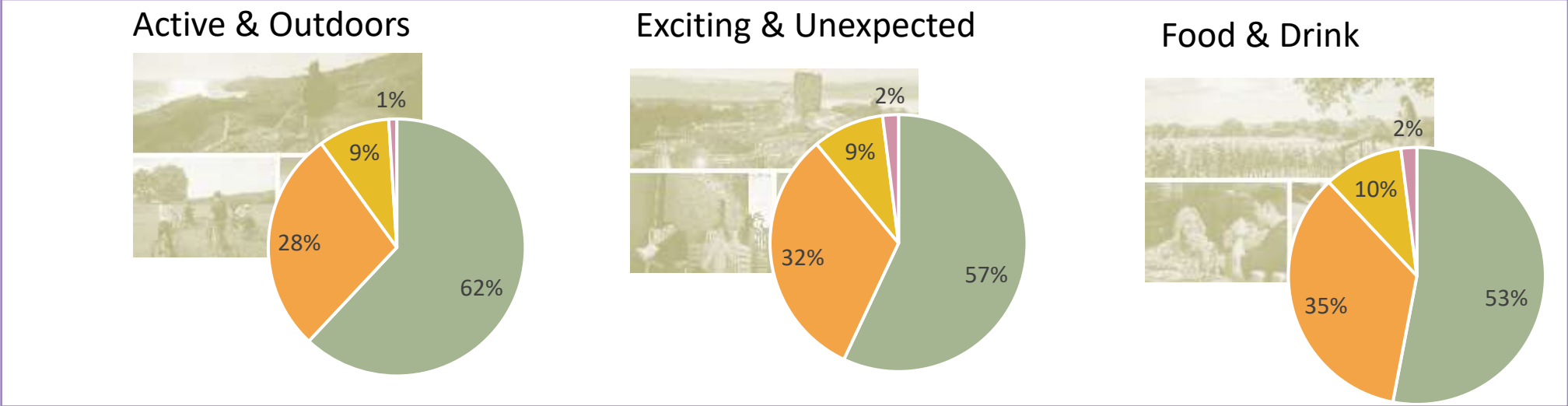
Within the research, respondents were shown sets of images and asked which would really inspire them to visit Kent

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

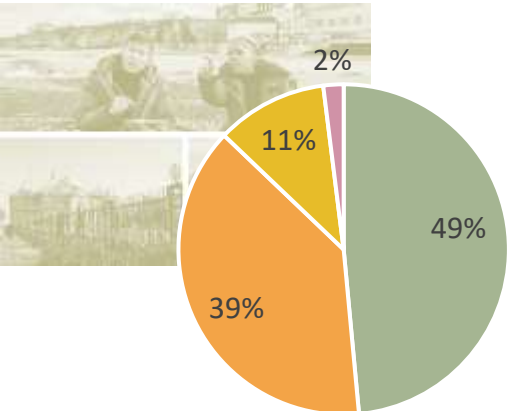
There is overlap in who is inspired by each set of images and the deep dive section contains further insight into the appeal of each theme

Inspiration to Visit Kent

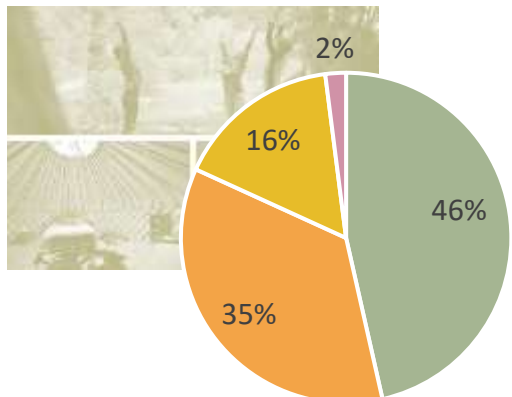
The Active & Outdoors imagery is most appealing to the inbound audience, with Exciting & Unexpected also appealing. Wellbeing and Arts & Culture are less appealing.



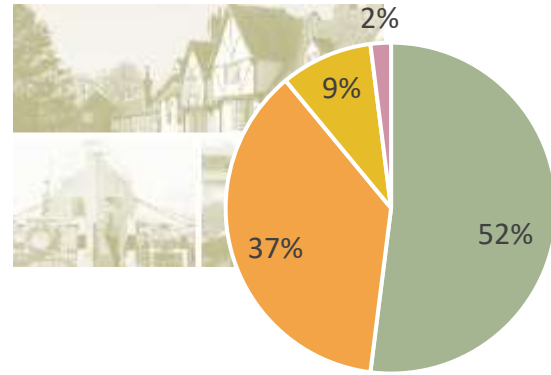
Arts & Culture



Wellbeing



History & Heritage



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

Inspiration to Visit Kent

Active & Outdoors is particularly appealing to visitors from France. History & Heritage has the strongest appeal among those from Spain. Wellbeing is least appealing to Germans and Americans.

Active & Outdoors	US	Germany	Spain	France
Really inspires me to visit Kent	55%	58%	66%	68%
Inspires me a little	31%	33%	25%	23%
Doesn't really appeal to me	11%	7%	8%	8%
Puts me off visiting Kent	2%	2%	1%	1%

History & Heritage	US	Germany	Spain	France
Really inspires me to visit Kent	49%	45%	63%	52%
Inspires me a little	39%	42%	31%	36%
Doesn't really appeal to me	10%	11%	5%	10%
Puts me off visiting Kent	3%	3%	1%	2%

Exciting & Unexpected	US	Germany	Spain	France
Really inspires me to visit Kent	53%	50%	63%	61%
Inspires me a little	34%	36%	28%	29%
Doesn't really appeal to me	10%	13%	8%	7%
Puts me off visiting Kent	3%	2%	1%	2%

Art & Culture	US	Germany	Spain	France
Really inspires me to visit Kent	46%	44%	54%	50%
Inspires me a little	40%	41%	37%	37%
Doesn't really appeal to me	12%	13%	7%	11%
Puts me off visiting Kent	2%	2%	1%	2%

Food & Drink	US	Germany	Spain	France
Really inspires me to visit Kent	51%	47%	59%	56%
Inspires me a little	37%	40%	32%	31%
Doesn't really appeal to me	11%	11%	7%	11%
Puts me off visiting Kent	2%	2%	1%	2%

Wellbeing	US	Germany	Spain	France
Really inspires me to visit Kent	42%	34%	55%	51%
Inspires me a little	37%	39%	33%	33%
Doesn't really appeal to me	18%	25%	11%	13%
Puts me off visiting Kent	3%	2%	1%	2%

Inspiration to Visit Kent

Active & Outdoors



More appealing to:

- Women
- Those aged 35-55 years
- Day visits & short breaks
- Couples & adult groups
- Off-peak visitors
- Buzzseekers & Explorers

History & Heritage



More appealing to:

- Those aged over 55 years
- Couples & adult groups

Exciting & Unexpected



More appealing to:

- Women
- Those aged under 55 years
- Off-peak visitors
- Buzzseekers

Wellbeing



More appealing to:

- Females
- Under 55 years
- Recent visitors
- Couples & adult groups
- Buzzseekers

Food & Drink



More appealing to:

- Those aged 35-55 years
- Couples

Arts & Culture



More appealing to:

- Women
- Those aged 35 and over
- Short break & off-peak visitors
- Couples



Perceptions



Word Associations with Kent - France

The countryside, nature and scenery are most commonly mentioned by the French.



Word Associations with Kent - Spain

The Spanish mention the beauty and scenery. Also the history/historic buildings and the calm/tranquillity of the area. The cold weather is also noted!



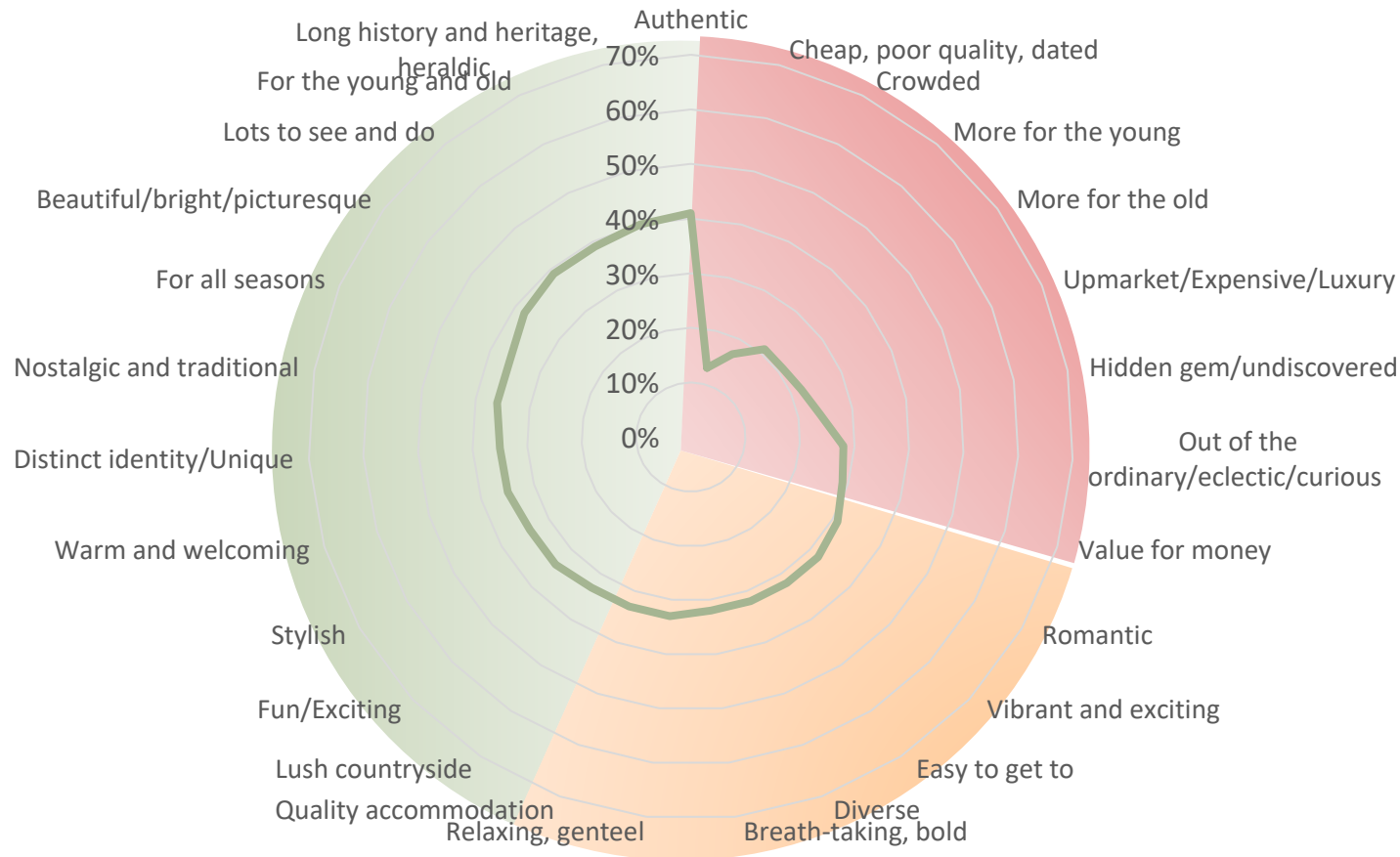
Word Associations with Kent - Germany

The natural landscape and beauty of Kent is noted by the Germans, with mentions also of the history and culture of the area. Specific places and attractions were mentioned suggesting a higher level of familiarity amongst the Germany market.



Statement association - Kent

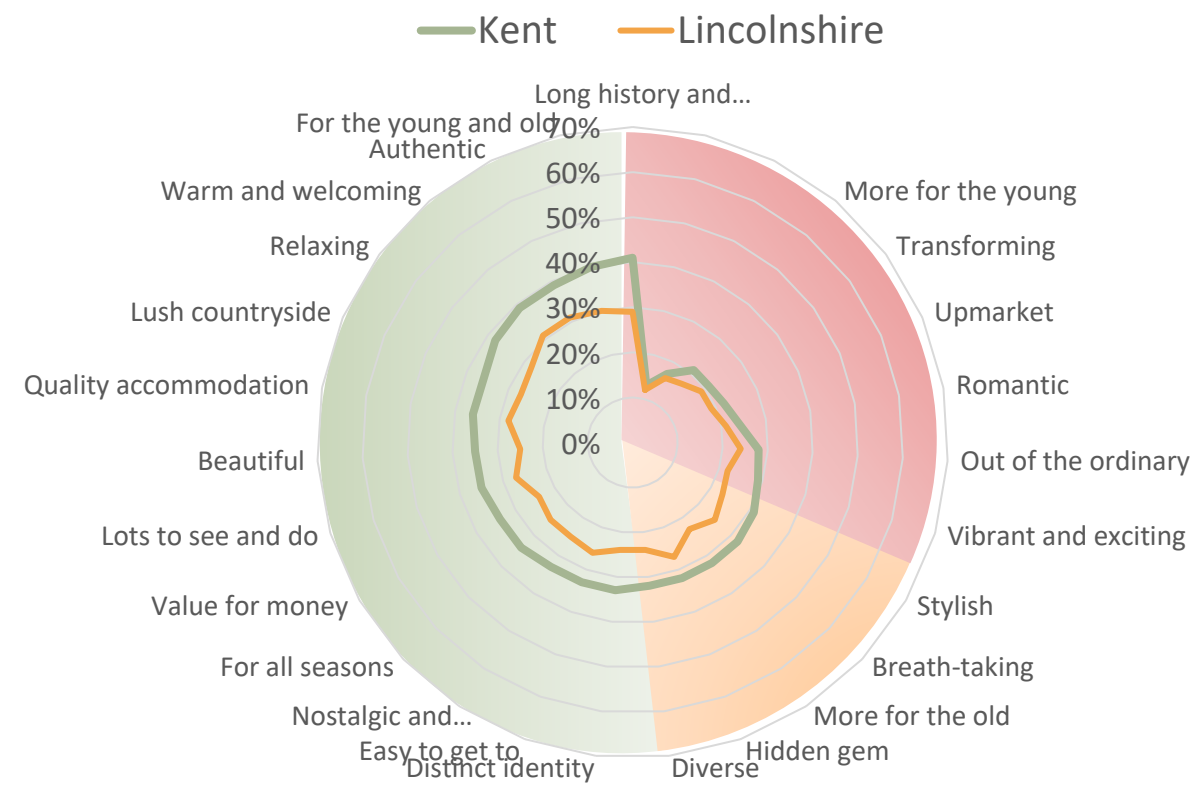
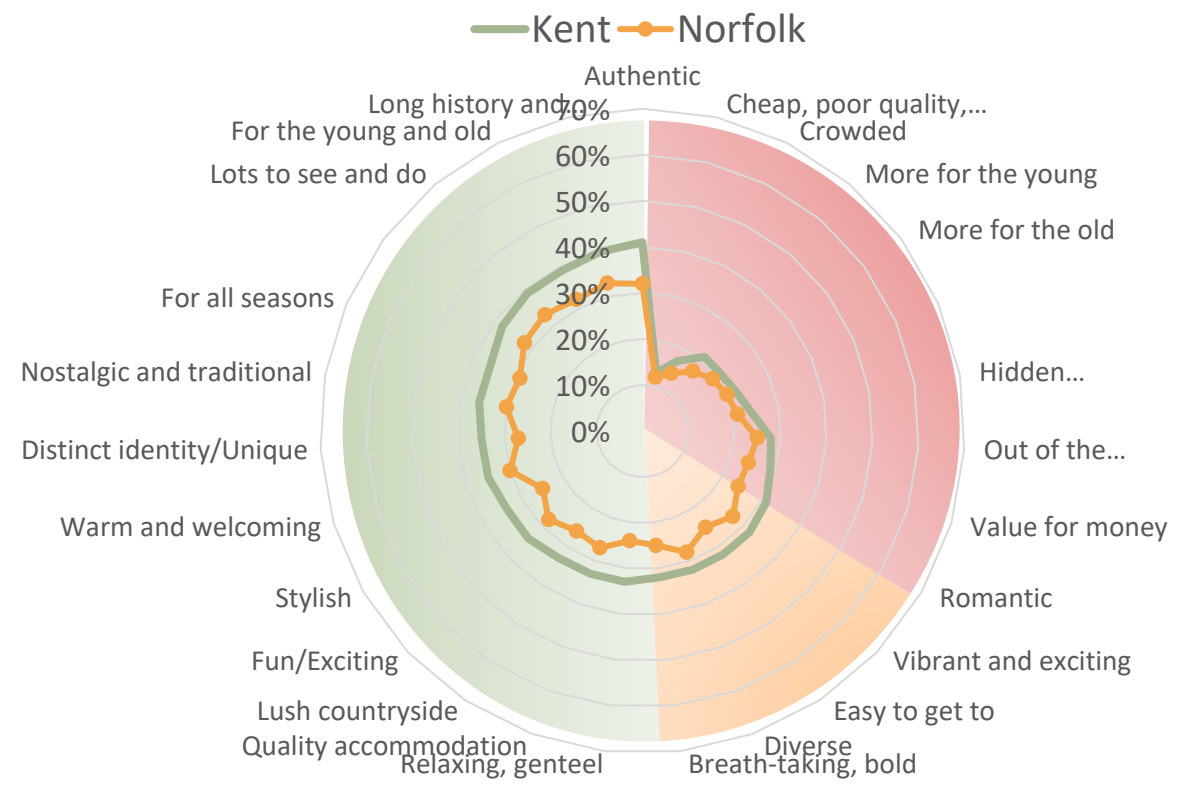
Associations with Kent are broad with authenticity and heritage most mentioned. It is not seen as cheap, crowded for any one audience in particular.



- The primary strengths of Kent across international markets are around the authenticity of the area and its history & heritage. The beauty of the region is also acknowledged and reflects the spontaneous descriptions shown previously.
- Compared to other countries Germany is more likely to see Kent as 'out of the ordinary', 'stylish' and 'nostalgic/traditional'.
- Younger people have less positive associations than other age groups. Those over 55 years most strongly associate Kent with its history & heritage.
- Adventurers are most positive around history, things to do and authenticity. Buzzseekers are more likely to have some negative associations with Kent around quality, and it being crowded
- Those visiting alone tend to have a different and generally less positive view of Kent than those visiting as a couple or group.
- Those who have visited Kent before are more positive, except in their perceptions of lots to see and do

Statement association – Norfolk & Lincolnshire

Profiles of other counties are broadly similar to Kent, but a lower incidence (impacted in part by the screening process). This suggests that perceptions of England more generally may be driving associations at county-level too.

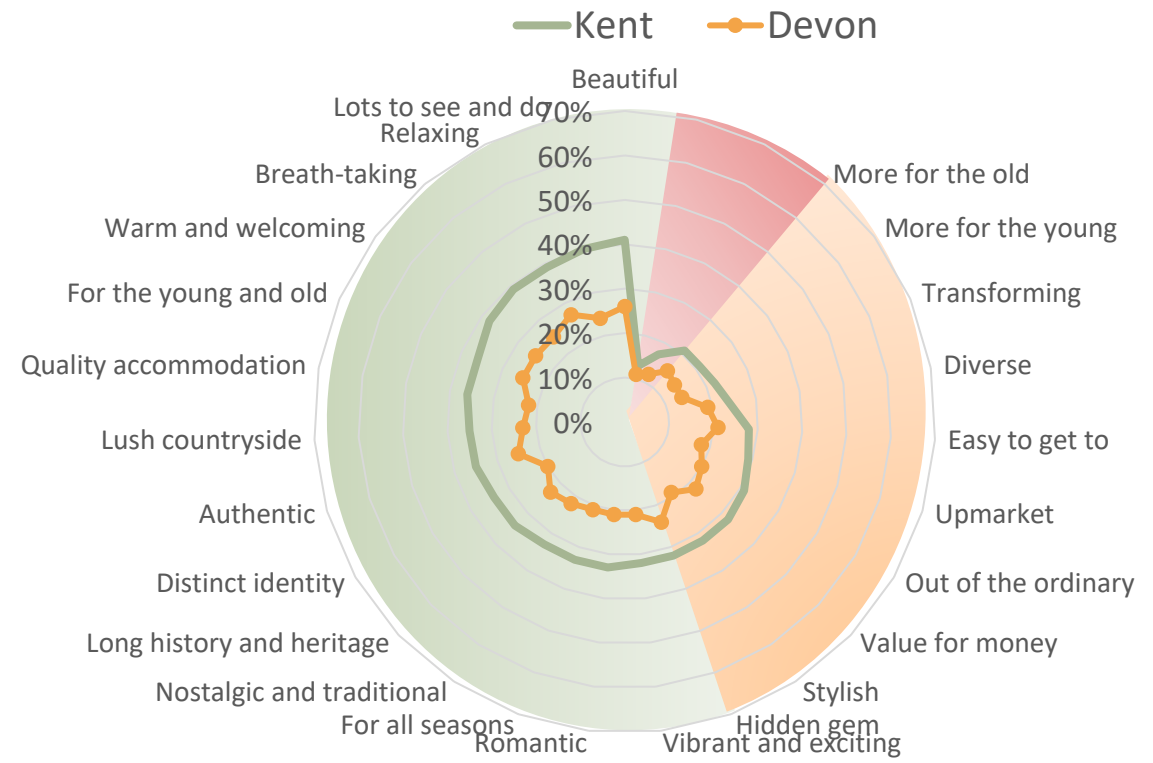
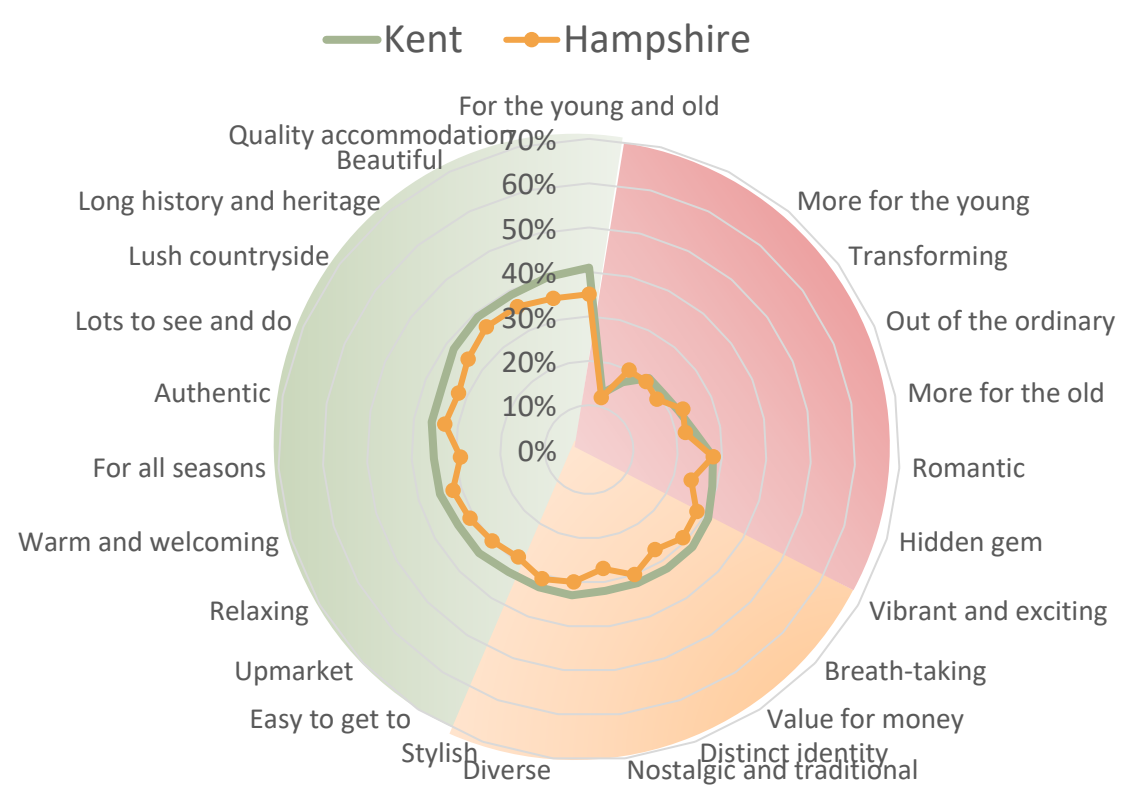


Q33 Now we are going to show you a list of things people have said about different destinations for holidays and short breaks in the UK. Thinking about each statement, please indicate which destination or destinations in each row you associate with that statement. You can select as many or as few destinations 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 (2,919)

Statement association – Hampshire & Devon

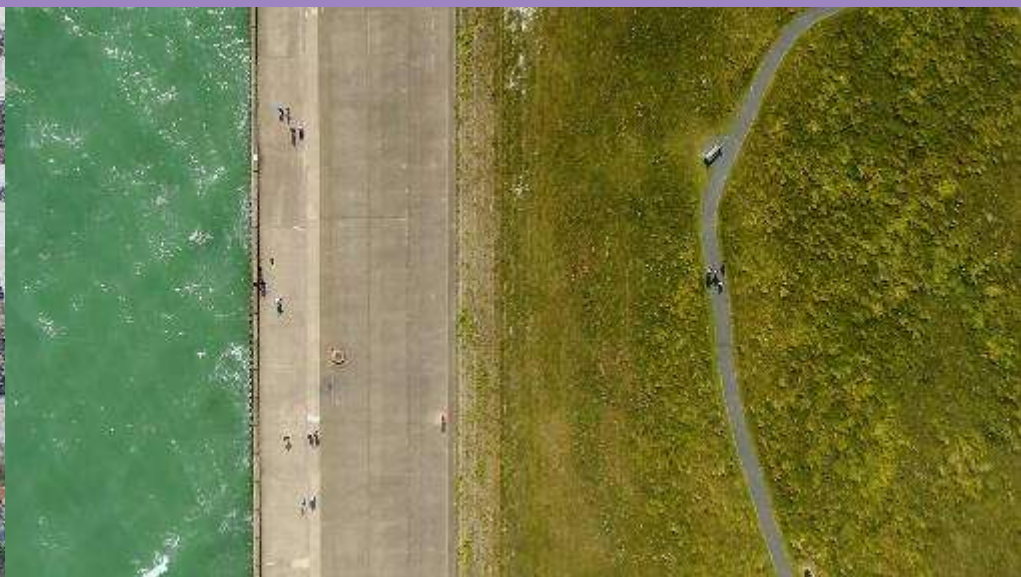
Hampshire has very similar associations to Kent among international audiences.
 Devon has much lower association levels than Kent, contrasting the domestic picture where Devon's positioning is much stronger.



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.



Immersive Experiences



Experiences included in the research

Immersive guided food and drink experiences

- Cider farm tour and tasting
- 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

Out of the ordinary

- Walking pilgrimage – along the Augustine Camino pilgrimage route
- Gin and steam locomotive – from Royal Tunbridge Wells Railway Station
- Ghost hunting tour
- Smuggler adventure

Expert helps you discover, create and learn something

- Photography tour – various locations (city based, The Historic Dockyard Chatham, forest and downs)
- Heritage arts tours – delivered by guides dressed as historical characters relevant to Kent
- Upcycling workshops
- Craft workshops - learning a new skill e.g. dried flower art
- Martial Arts classes – on a nature reserve

Rural landscape experiences to get closer to nature

- 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

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

- 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

Immersive Experiences

The experiences that are most popular are those that are recognised and have clear potential to be unique to Kent

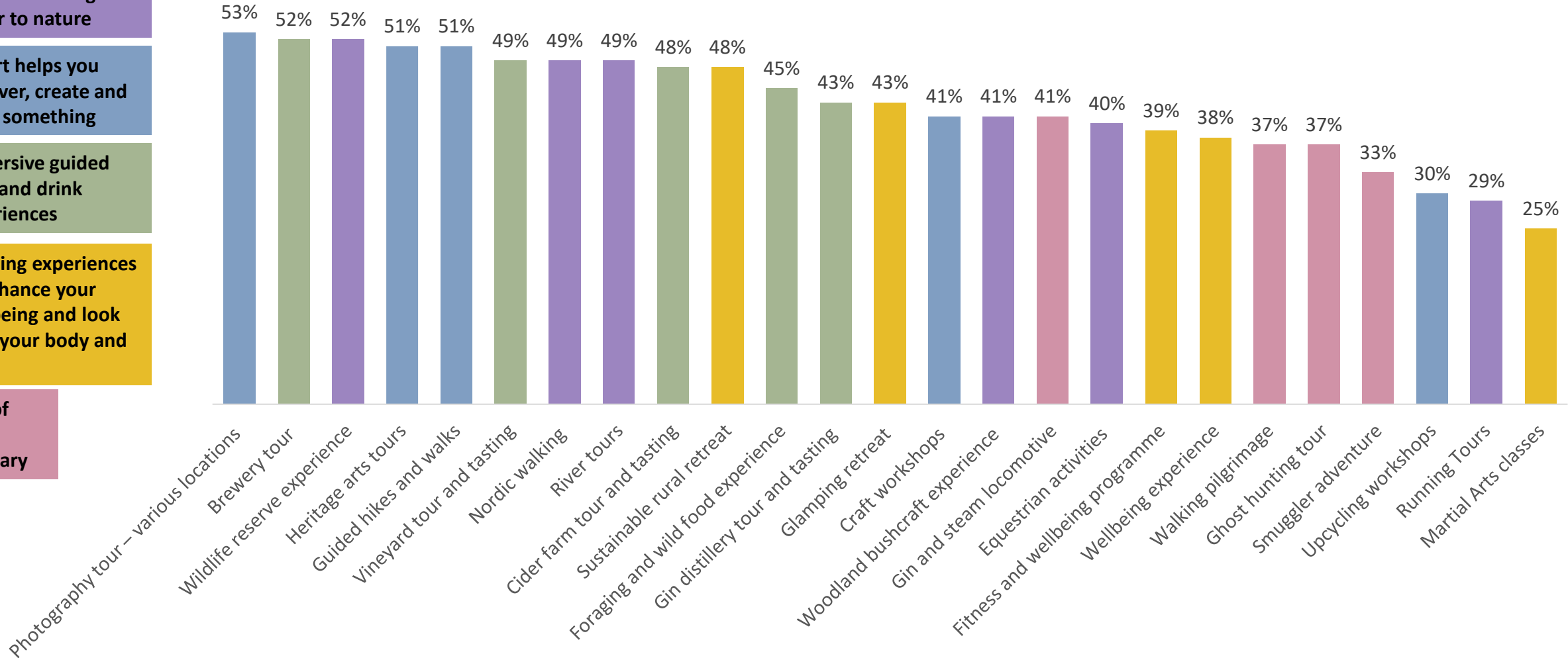
Rural landscape experiences to get closer to nature

Expert helps you discover, create and learn something

Immersive guided food and drink experiences

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

Out of the ordinary



Q57/58/59 Would you consider doing any of theseexperiencesin the future whilst on a holiday or short break in Kent?

Base: All (2,919), US (750), Germany (671), Spain (750), France (748)

Immersive Experiences Summary

Differences in appeal of experiences across demographic groups are summarised below and full details are included in the Deep Dive section

People in Germany generally have the lowest interest in experiences, while interest levels across France, Spain and US are generally similar. People in Spain are particularly keen on Nordic Walking. People in the US have the highest interest in the Smuggler Adventure.

Interest levels are similar across men and women with a few notable exceptions:

- Women are more interested in the Sustainable Rural Retreat, Craft Workshops and Wellbeing experiences
- Men are more interested in the Brewery Tour and the Gin & Steam Locomotive

Generally those aged 55 and under are much more interested in experiences than those aged over 55 years. The exceptions, where over 55 have interest levels closer to younger people are:

- Brewery tour
- Vineyard tour & tasting
- Gin distillery tour & tasting
- Gin & steam locomotive

Martial Arts Classes, Running Tours and Upcycling Workshops tend to really only be of interest to the under 35's, who are also the age group most interested in the Glamping Retreat.

Those travelling alone are least interested in experiences (with the exception of the Brewery Tour).

Peak and off-peak appeal broadly follows the mix of outdoor vs indoor experiences.

River tours are particularly appealing to those on higher incomes, perhaps reflecting an interest in cruises.

Generally across the segments, it is Buzzseekers who have the highest interest in experiences, with only Guided Hikes & Walks being higher among Adventurers.



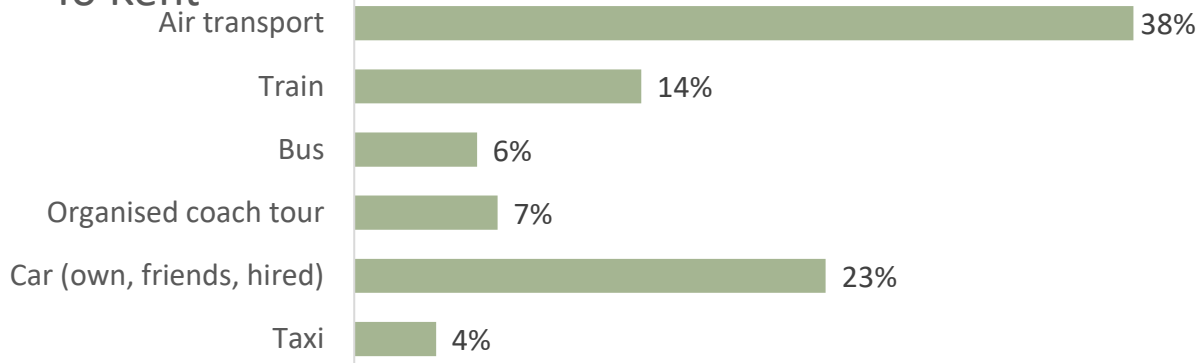
Transport



Transport – Future Visit

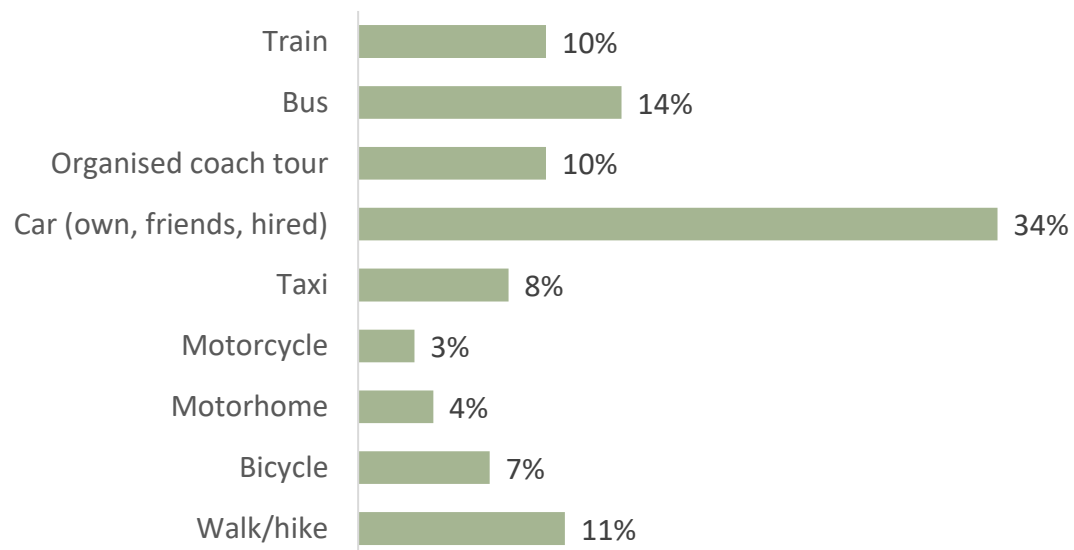
Most inbound visitors flew into England (UK). A third of visitors use a car to get around Kent, with public transport also popular. It is important to note that 1 in 6 visitors will walk or cycle around the area they are staying in.

To Kent



Solo travellers are less likely to arrive in Kent by car compared to other visitor groups, arriving instead by other forms of public transport. Those on medium and higher incomes are more likely to arrive by car.

Around Kent



Young people and those travelling alone are more likely to travel around Kent by train or taxi, while those over 35 years are more likely to use a car. Adventurers and Buzzseekers are more likely to travel by car than other segments are.

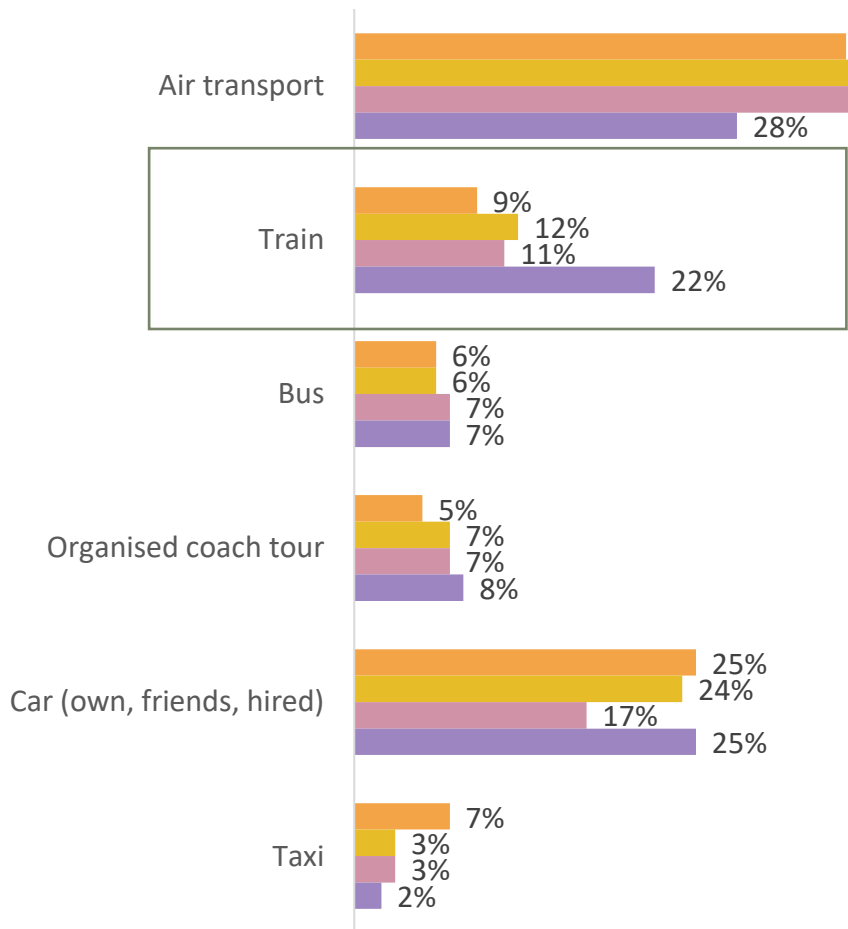
Organised coach tours are more popular as a way of getting around Kent among

- the over 55's (12%)
- those who have not visited England before (12%)
- Sightseers (13%)

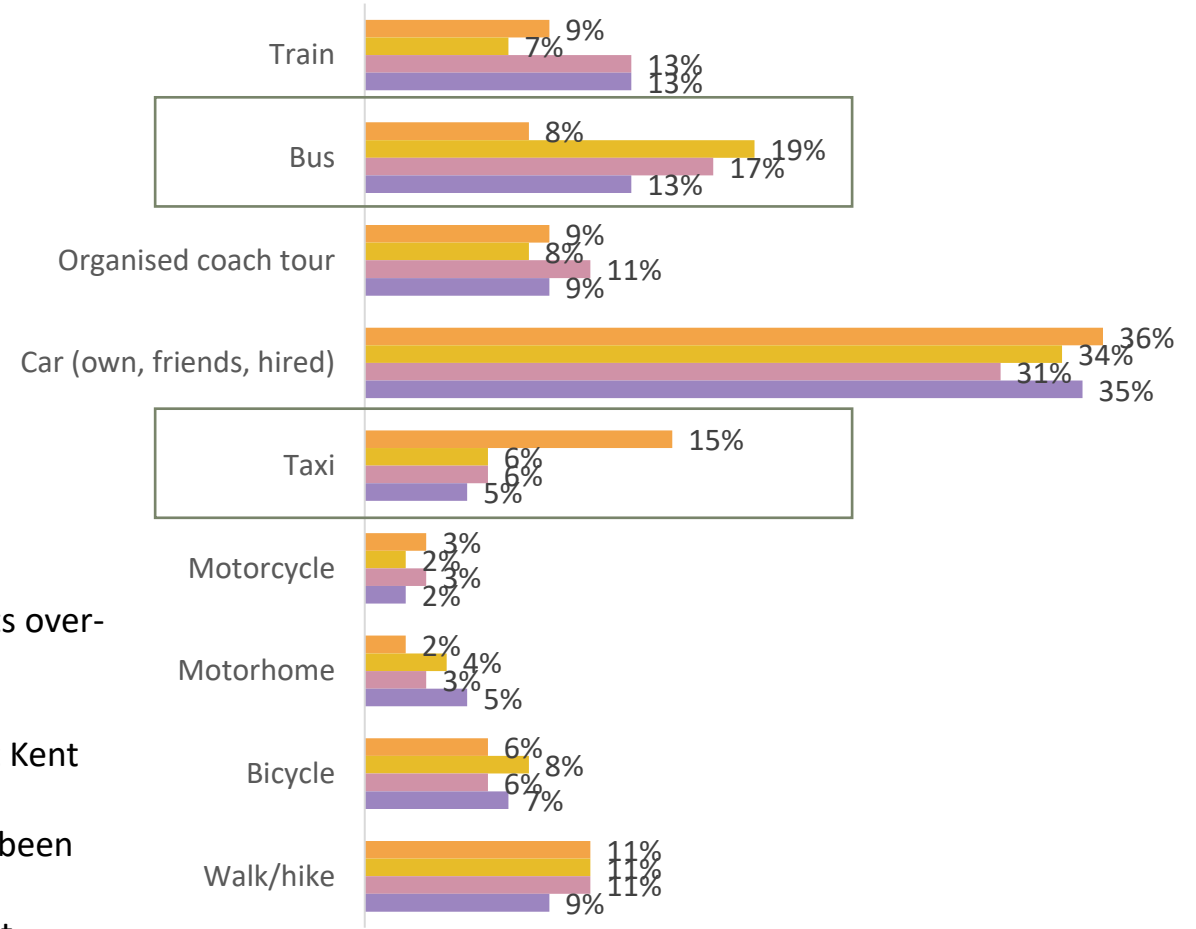
Transport – Future Visit

Most inbound visitors flew into England (UK), with 22% of visitors from France arriving by train. Visitors from US are most likely to rely on taxis to get around Kent, rather than public transport.

To Kent



Around Kent



Coach tours:
 Across all inbound markets over-index on:

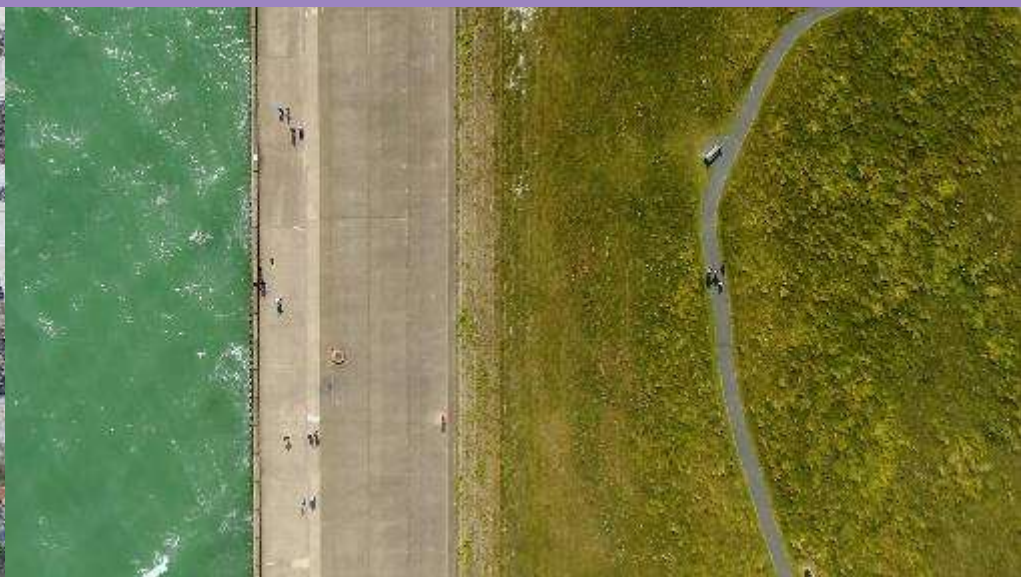
- 55yrs and over
- those who would visit Kent as a day trip
- People who have not been to England before
- The Sightseer segment

US Germany Spain France

US Germany Spain France

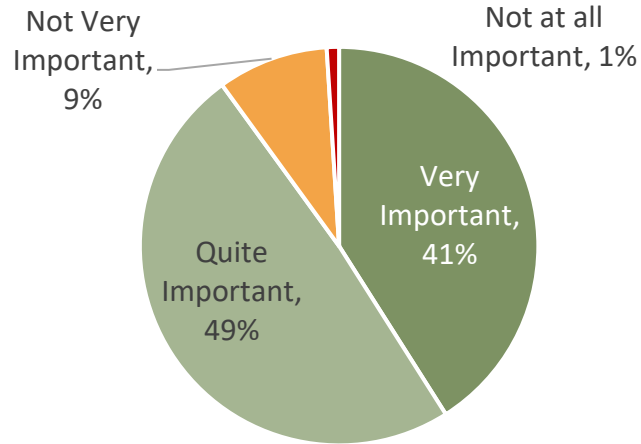


Accommodation



Accommodation is an important element of the destination decision making process and the opinion on accommodation available in Kent is generally perceived to be at least 'good'

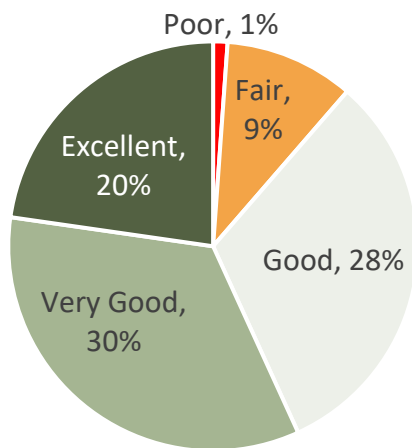
Importance of accommodation (type, quality) in choosing destination



Accommodation	US	Germany	Spain	France
Very Important	48%	35%	41%	40%
Quite Important	44%	52%	49%	51%
Not Very Important	7%	11%	9%	8%
Not at all Important	1%	3%	1%	1%

Accommodation is important for all inbound visitors, marginally less so among those from Germany and most important for travellers from US.

The quality of accommodation options



Accommodation	US	Germany	Spain	France
Excellent	29%	13%	20%	16%
Very Good	31%	30%	31%	30%
Good	21%	34%	28%	31%
Fair	6%	8%	10%	10%
Poor	1%	1%	1%	1%

Visitors from the US have the most positive perception of the quality of accommodation and Germany the least so (reflecting previous VisitBritain research).

Q24 How important was your accommodation type on your last visit/holiday in Kent? Base: 1229 past visitors to Kent: US (309), Germany (240), Spain (339), France (341)

Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes? Base: All (2,919) US (750), Germany (671), Spain (750), France (748)

Accommodation

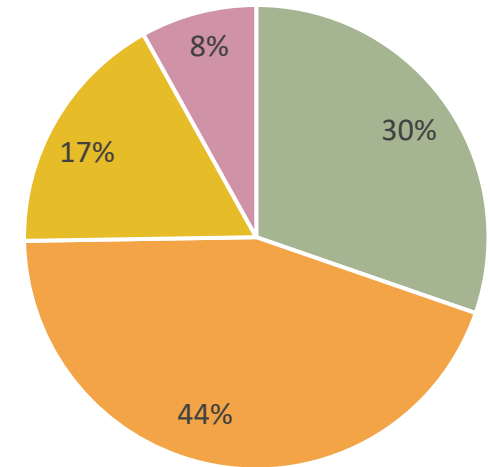
Accommodation is one of several elements that go into the decision-making process for inbound visitors. However accommodation is an important part of the holiday experience for the majority of visitors.

Percentage ranking :

■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7



- 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")



Travellers from the US and Spain are more likely to say the accommodation can be the main reason for the holiday, reflecting perhaps the higher interest in 5 star accommodation (see following)

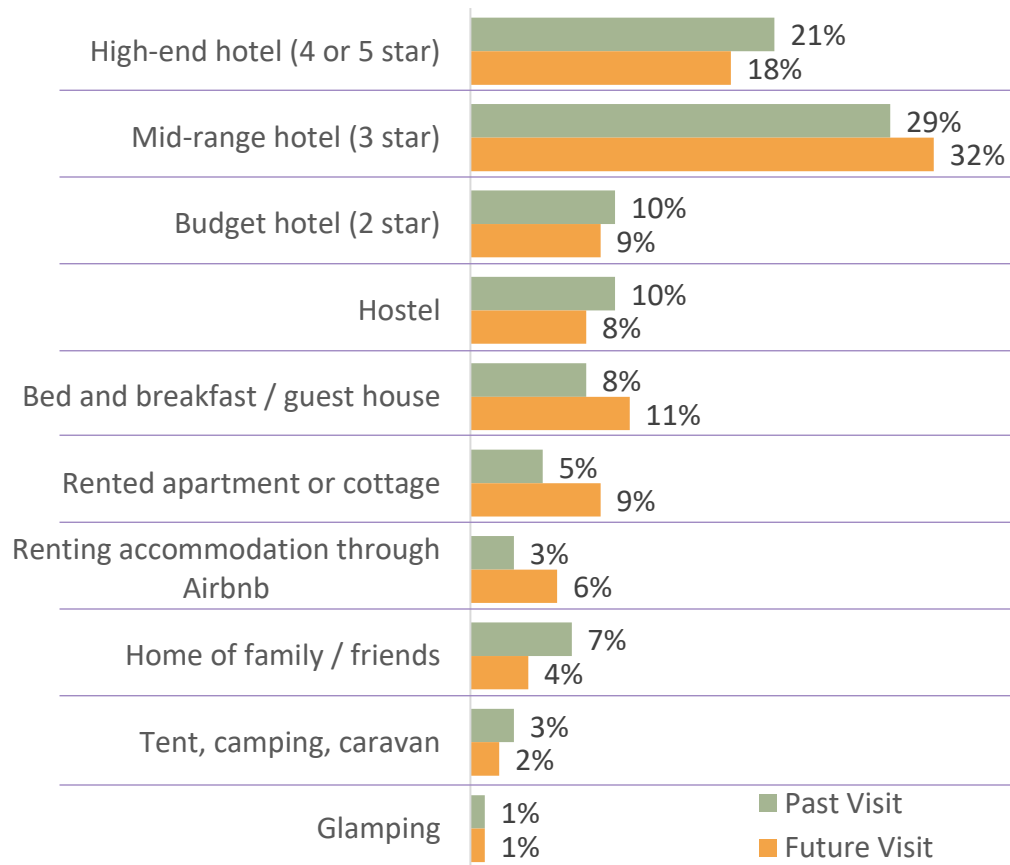
Influence	US	Germany	Spain	France
Main reason	39%	19%	35%	26%
Significant influence	37%	51%	40%	48%
Small influence	16%	20%	15%	19%
No influence	7%	10%	10%	6%

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.

Q47 How important would your accommodation type be on a future visit/holiday to Kent? Base: All (2,919) US (750), Germany (671), Spain (750), France (748)

Accommodation

Mid-range hotels are most popular among inbound visitors, though self-catering and guest houses are also of interest for future visits.



US		Germany		Spain		France	
Past	Future	Past	Future	Past	Future	Past	Future
36%	27%	18%	13%	23%	20%	9%	10%
23%	27%	30%	35%	32%	38%	31%	27%
6%	6%	8%	8%	12%	11%	15%	11%
5%	6%	12%	7%	8%	6%	14%	12%
7%	13%	10%	11%	9%	6%	8%	14%
5%	6%	5%	14%	3%	7%	6%	9%
3%	6%	2%	4%	3%	4%	5%	11%
10%	6%	9%	4%	8%	5%	4%	2%
3%	2%	4%	3%	2%	2%	3%	2%
1%	1%	2%	1%	1%	2%	1%	1%

Q23 What type of accommodation did you stay in on your last visit/short break/holiday in Kent? Base: 756 past visitors to Kent, US (173), Germany (164), Spain (239), France (189)

Q46 What type of accommodation would you be most likely to stay in on a short break/holiday in Kent? Base: All (2,919) US (750), Germany (671), Spain (750), France (748)

Accommodation

High-end hotels are most likely to be the main reason for going on holiday. Other types of accommodation tend to have some influence over the holiday decision.

Future 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)	31%	14%	8%	5%
Mid-range hotel (3 star)	25%	37%	31%	27%
Budget hotel (2 star)	7%	9%	12%	14%
Hostel	8%	7%	8%	9%
Bed and breakfast / guest house	9%	11%	13%	14%
Rented apartment or cottage	9%	9%	10%	6%
Renting accommodation through Airbnb	4%	7%	8%	5%
Home of family / friends	4%	2%	4%	11%
Tent, camping, caravan	1%	2%	3%	7%

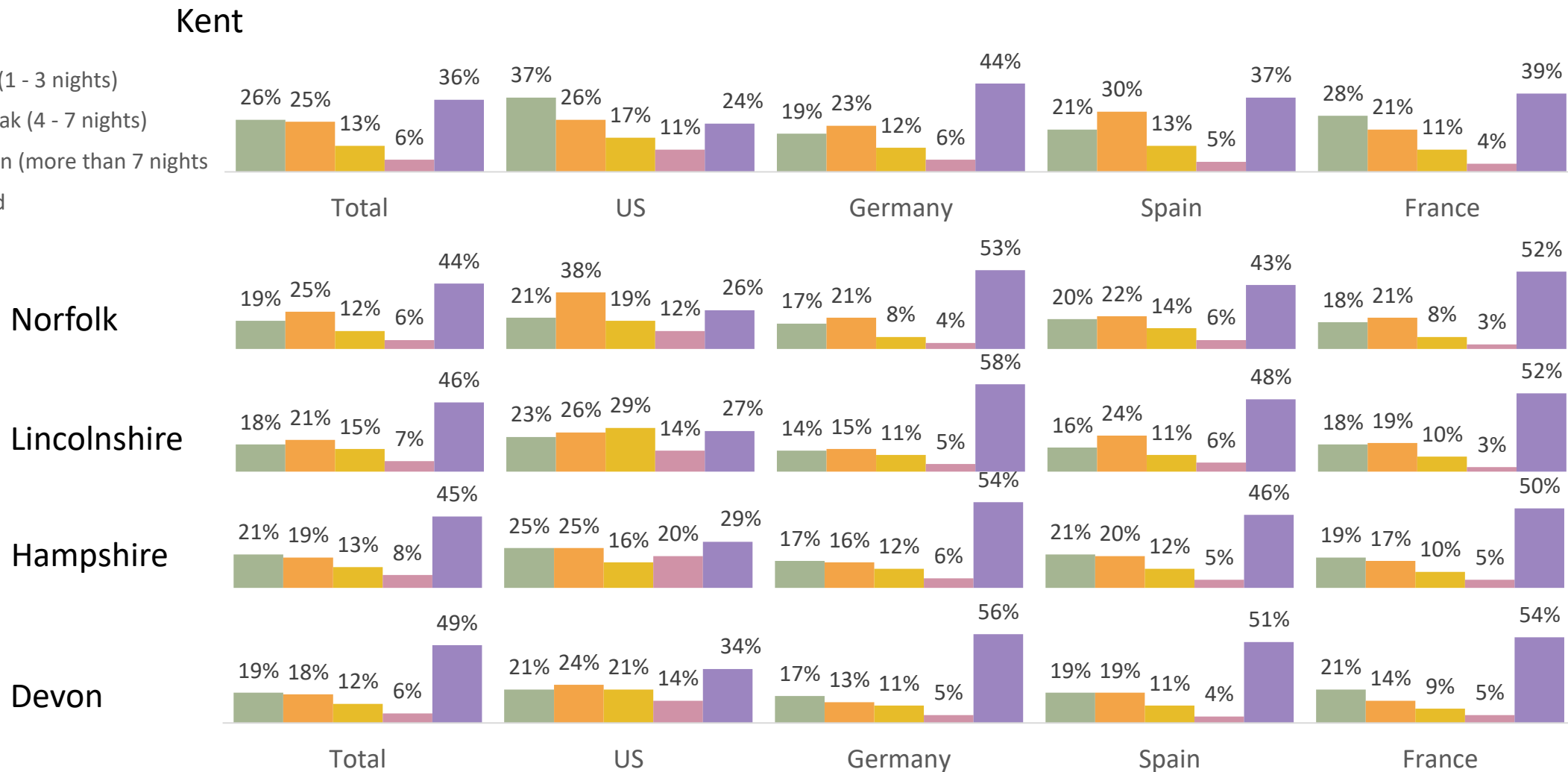


Visit Duration



Past Visit Duration

Kent has a greater proportion of day trippers, driven primarily by visitors from the US (who are likely on an tour of the country or Europe). The consistency of visit duration across all counties suggests an overriding behaviour pattern for inbound visitors to England's regions.

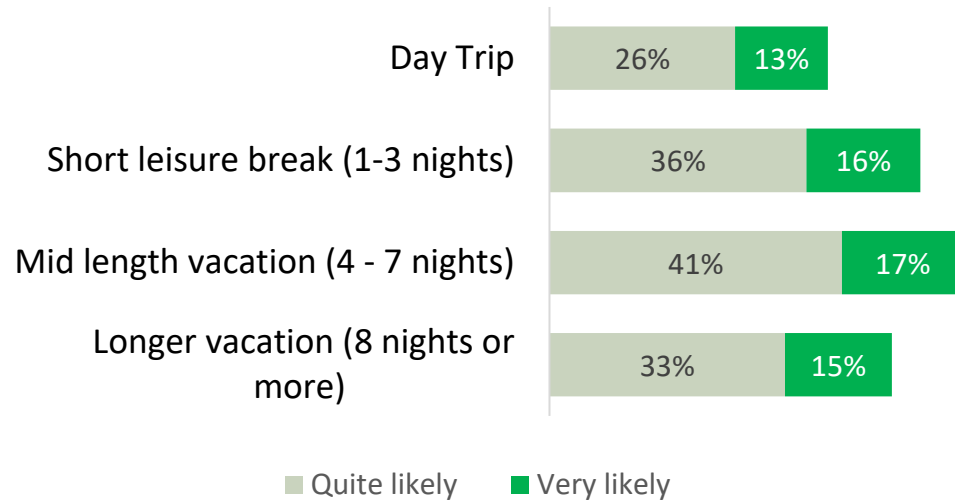


Q16. Have you ever visited the following places in England for a leisure trip or vacation? Base: All who have visited England and heard of: Kent (1,925) Norfolk (1,764) Lincolnshire (1,687) Hampshire (1,806) Devon (1,719)

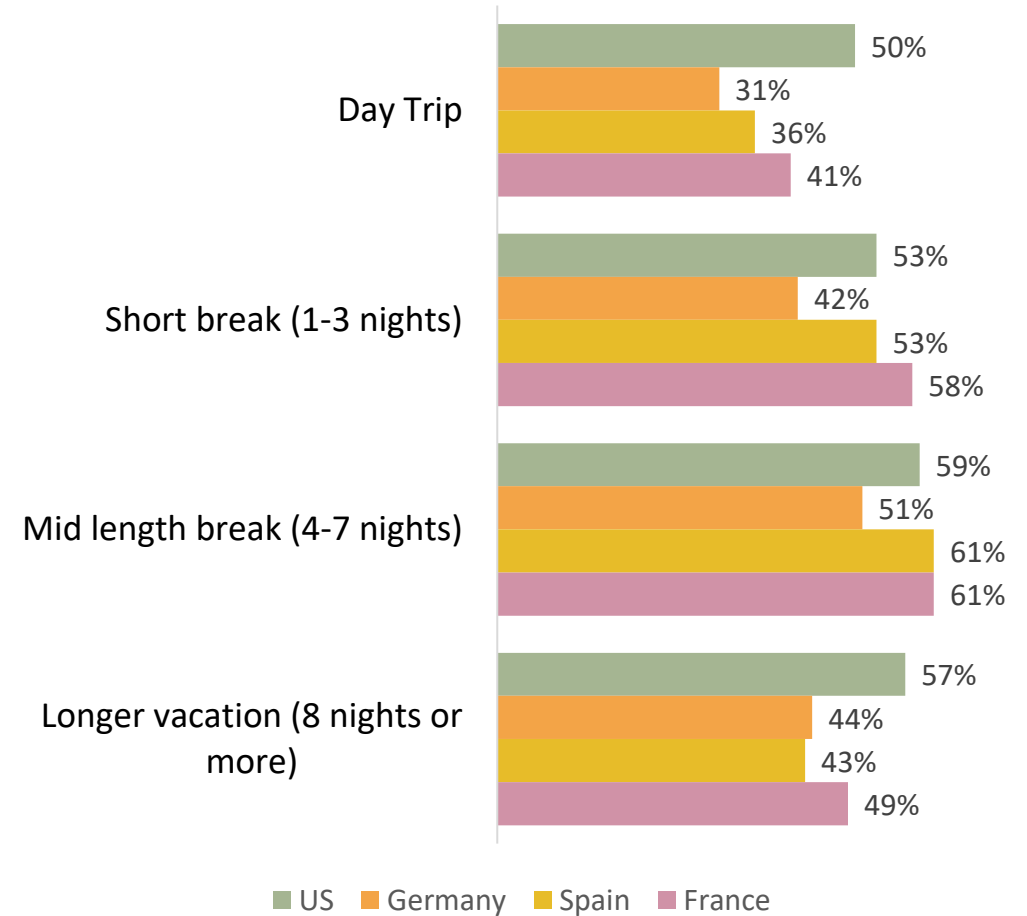
Likely Future Visit Duration

Inbound visitors are willing to consider a range of visit durations, though less than a week is most likely.

Potential visitors from the US have the broadest range of potential durations, perhaps reflecting that they are more likely to visit Kent as part of a longer visit to England (GB or Europe).



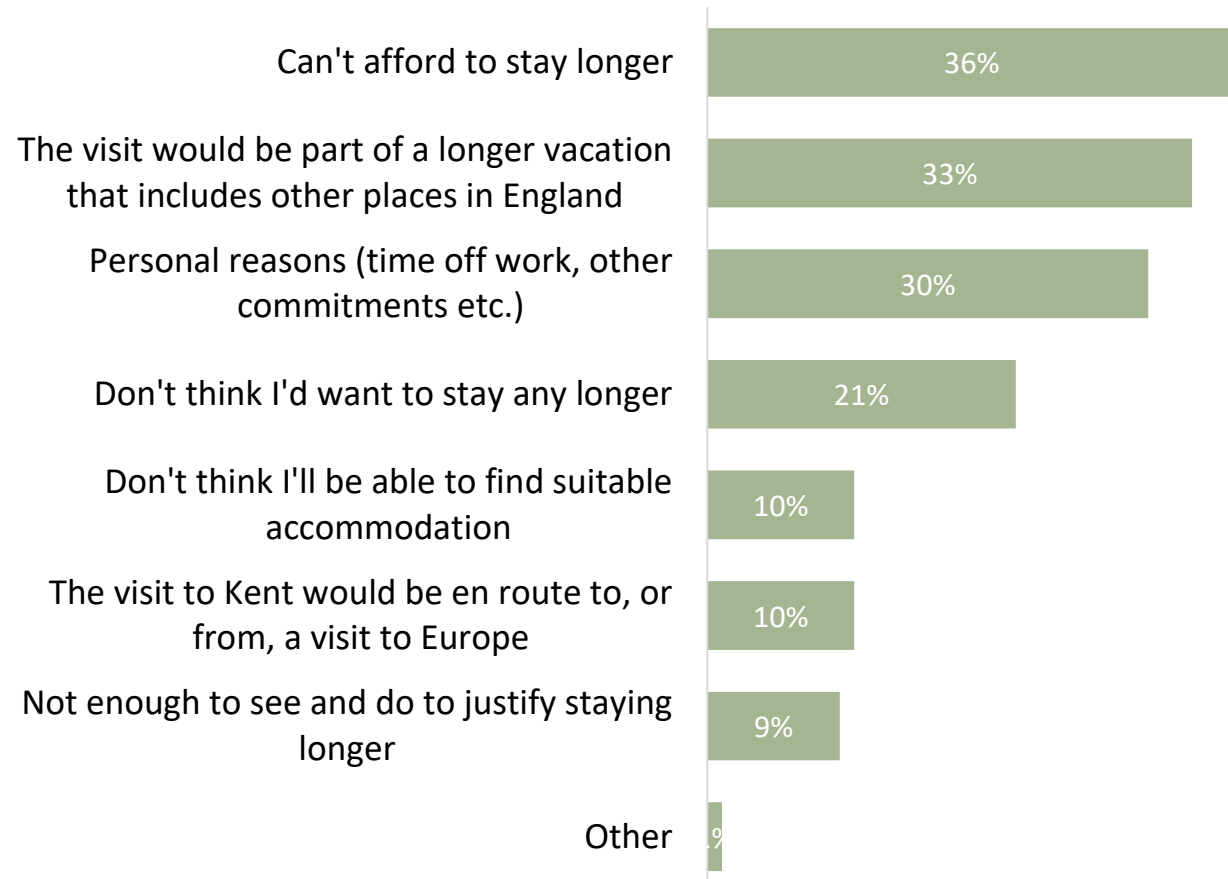
Net: Very/Quite Likely to visit Kent for.....



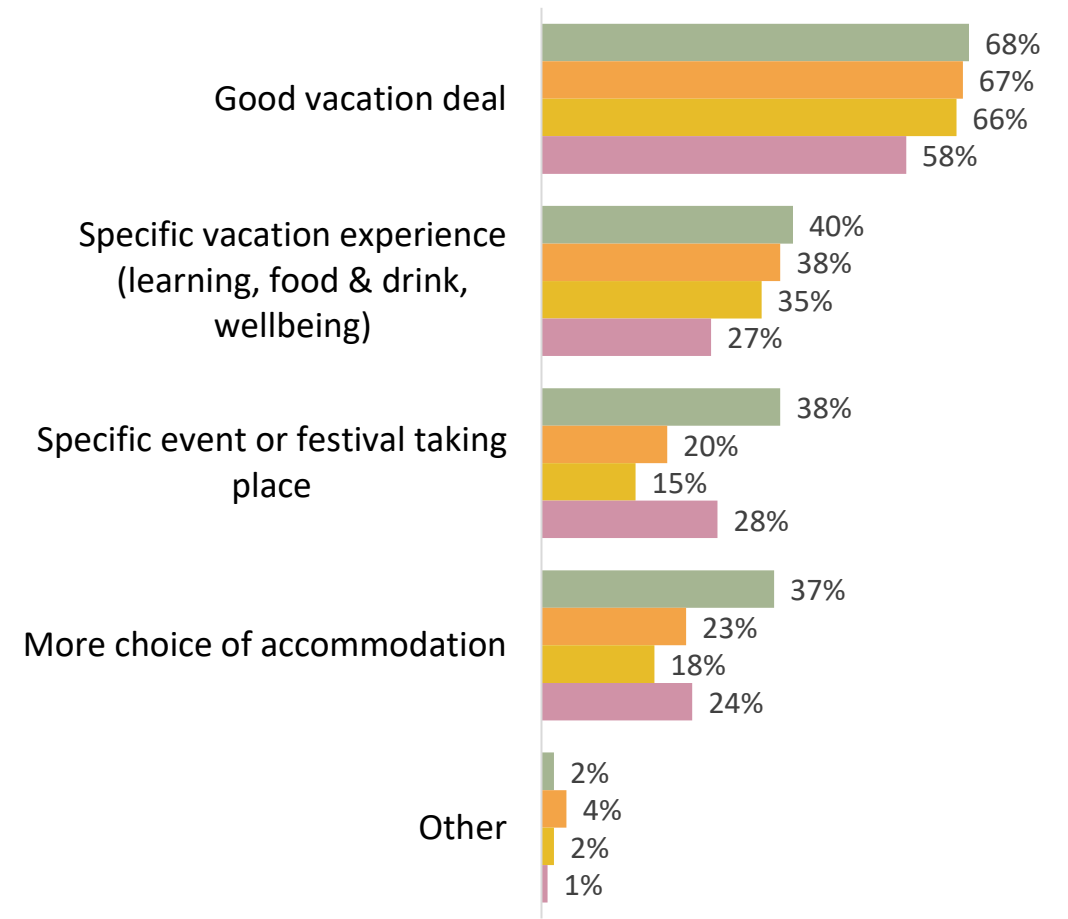
Q38 And now, thinking about the next 2 years, please use the scale to indicate how likely you are to visit Kent for a...?
 Base: All (2,919) US (750), Germany (671), Spain (750), France (748)

Barriers and Triggers to Stay Longer

Barriers to staying longer are typically personal reasons, though an opportunity may exist through demonstrating how much Kent has to offer. Visitors from US are most open to extending their stay in Kent.



People from France are most likely to say they wouldn't want to stay longer (28%)
 13% of US visitors say they would be enroute to or from a visit to Europe



■ US ■ Germany ■ Spain ■ France

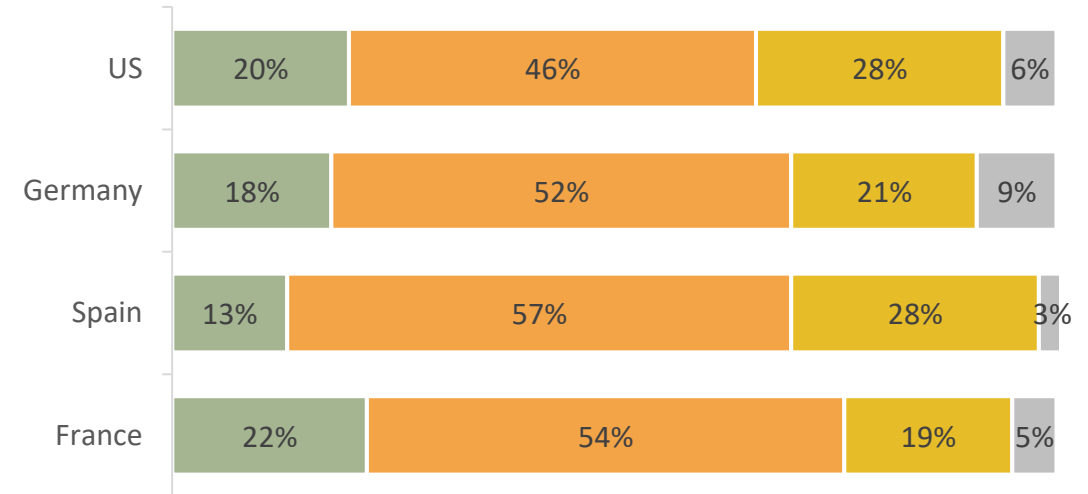
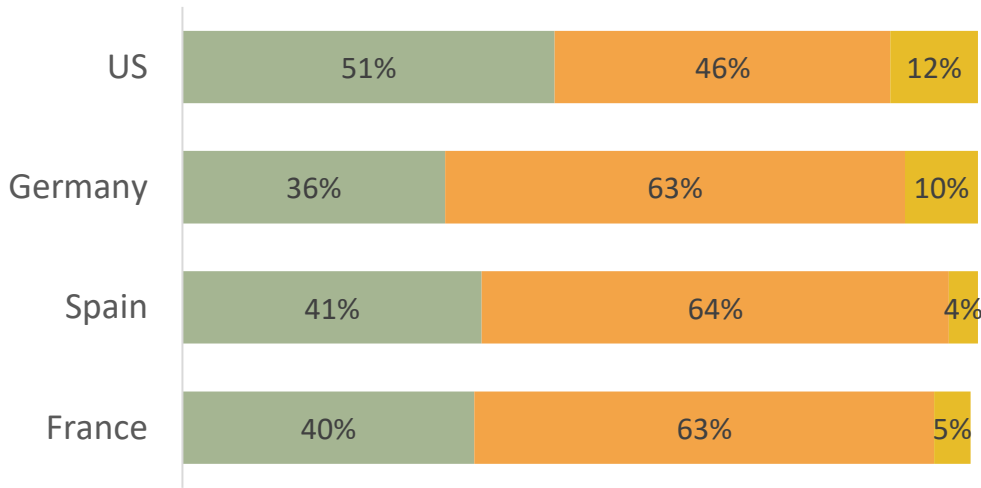
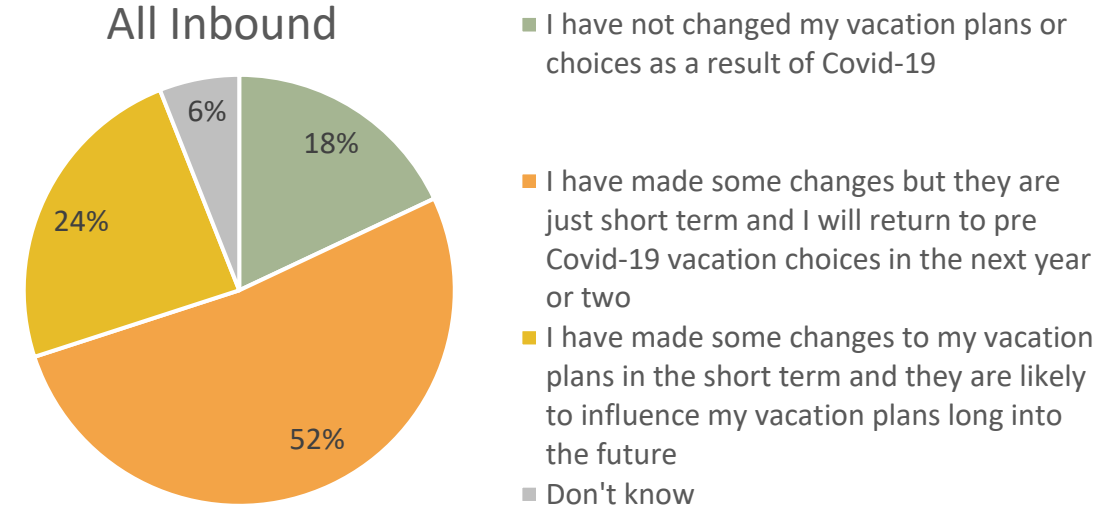
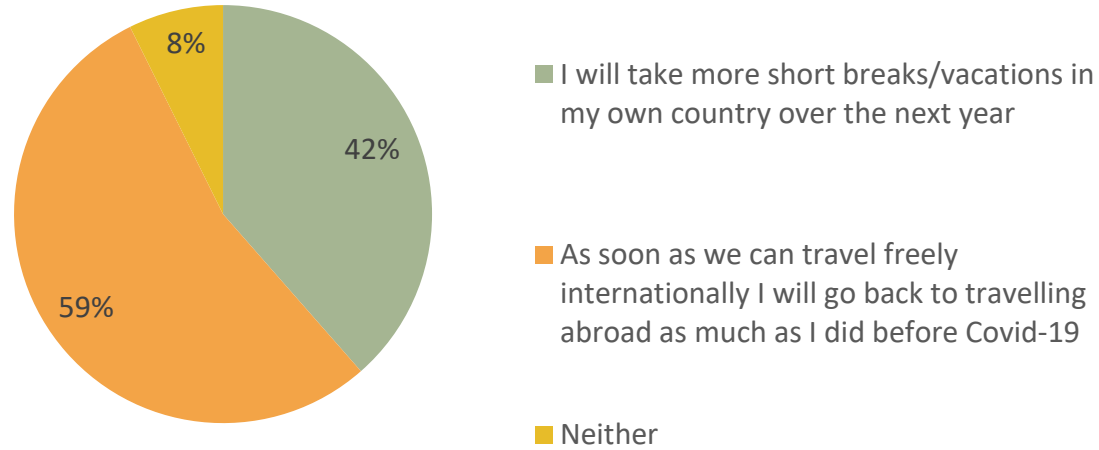
Q39 Why would you not stay longer on a visit to Kent?

Q40 What, if anything, would make you plan a longer stay in Kent? Base: All (2,919) US (750), Germany (671), Spain (750), France (748)

Covid-19 Impact



International travellers, like those in Britain expect to take more holidays in their own country. Those changes are short-term for half of travellers, but a quarter expect changes to be long-term.

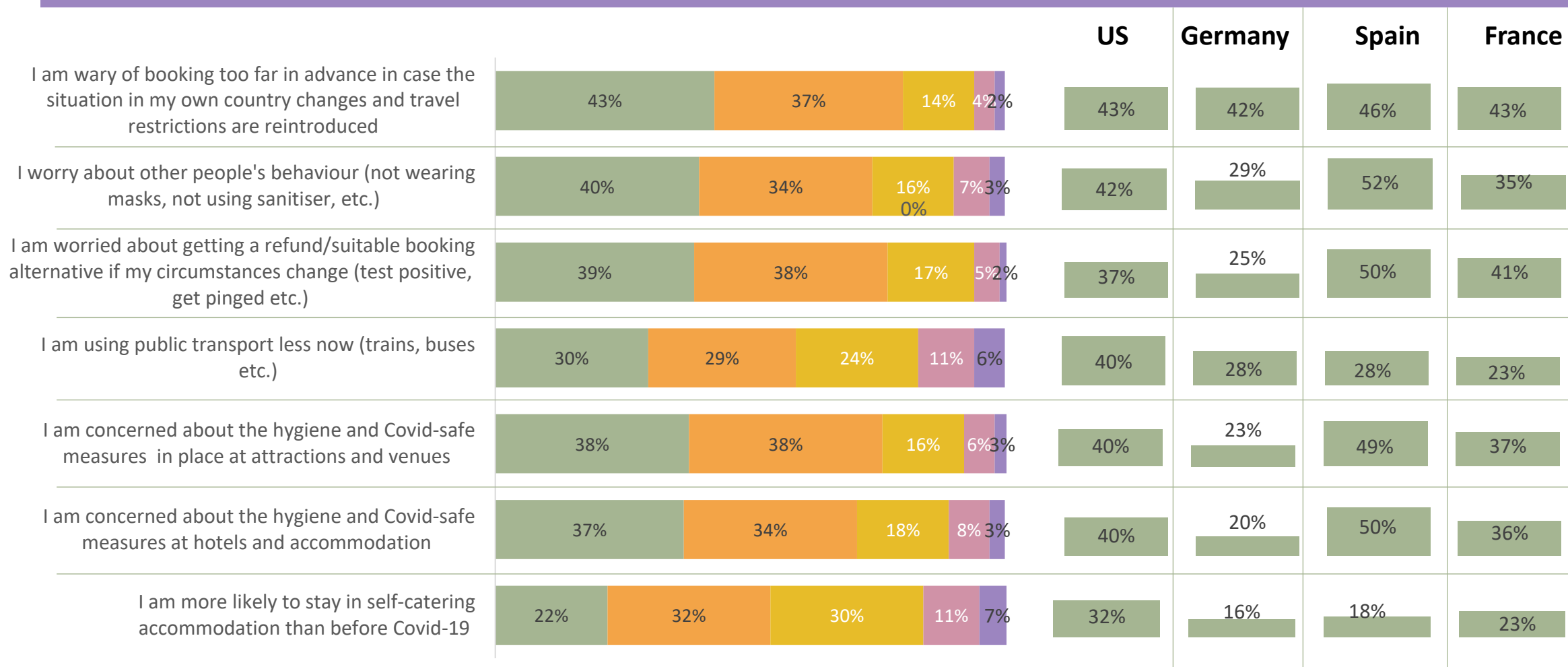


Q27 Which of the following statements apply to how the Covid-19 pandemic has impacted your leisure travel plans for the future? Base: All 2,919

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-19 behaviours in a year or two? Base: All 2,919

Covid-19

People in Germany appear least concerned about Covid-19 and people from Spain the most concerned. This may be, at least in part, be due to the virus situation in those countries at the time of fieldwork.



■ Agree strongly
 ■ Agree slightly
 ■ Neither agree nor disagree
 ■ Disagree slightly
 ■ Disagree strongly

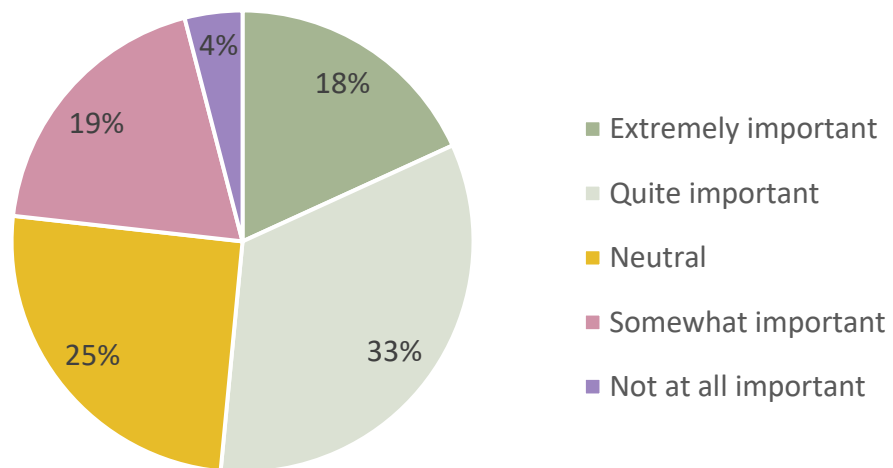


Sustainability



While just over half of international travellers say that the environment/sustainability are important, a quarter say that it has little or no importance to them. Views in the US are most polarised. Across Europe, the French assign the least importance to the environment and sustainability.

Importance of the environment and sustainability in choice of holiday



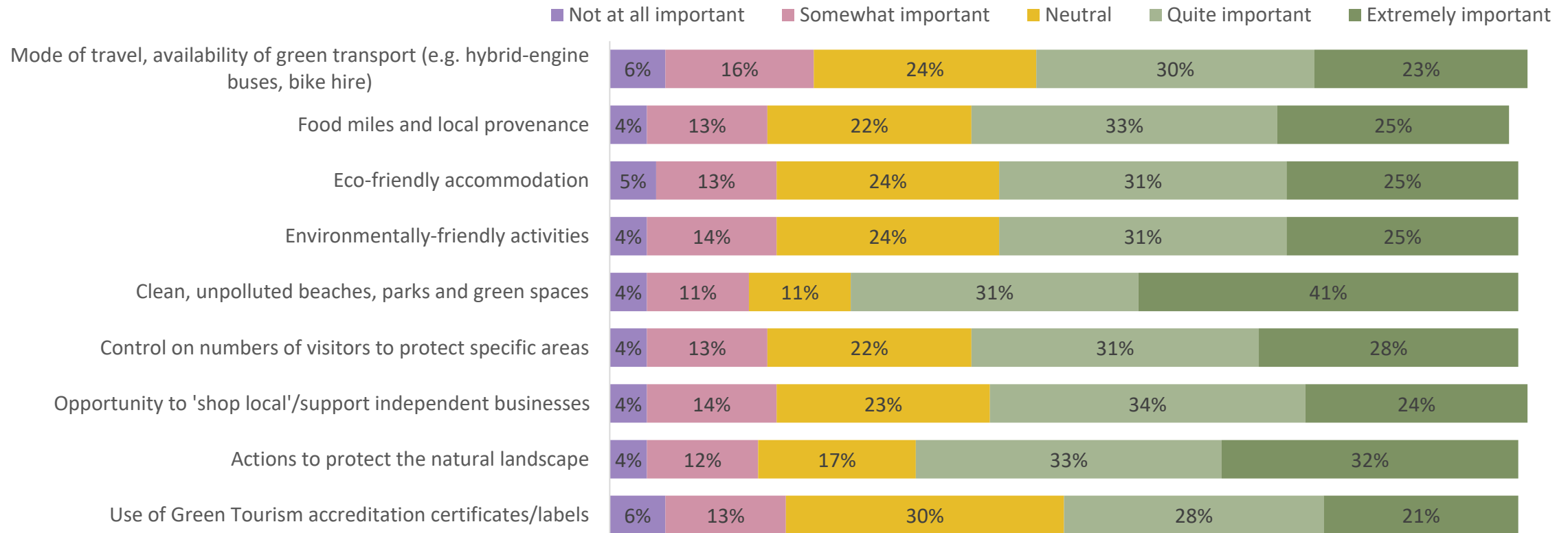
Sustainability	US	Germany	Spain	France
Very Important	27%	13%	17%	14%
Quite Important	21%	35%	46%	31%
Neutral	21%	34%	27%	21%
Somewhat Important	27%	12%	7%	30%
Not at all Important	5%	6%	2%	4%

Q30 How important is the environment and sustainability in your choice of holiday(s) and destination(s)? Base: All 2,919

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 2,919

Sustainability Measures

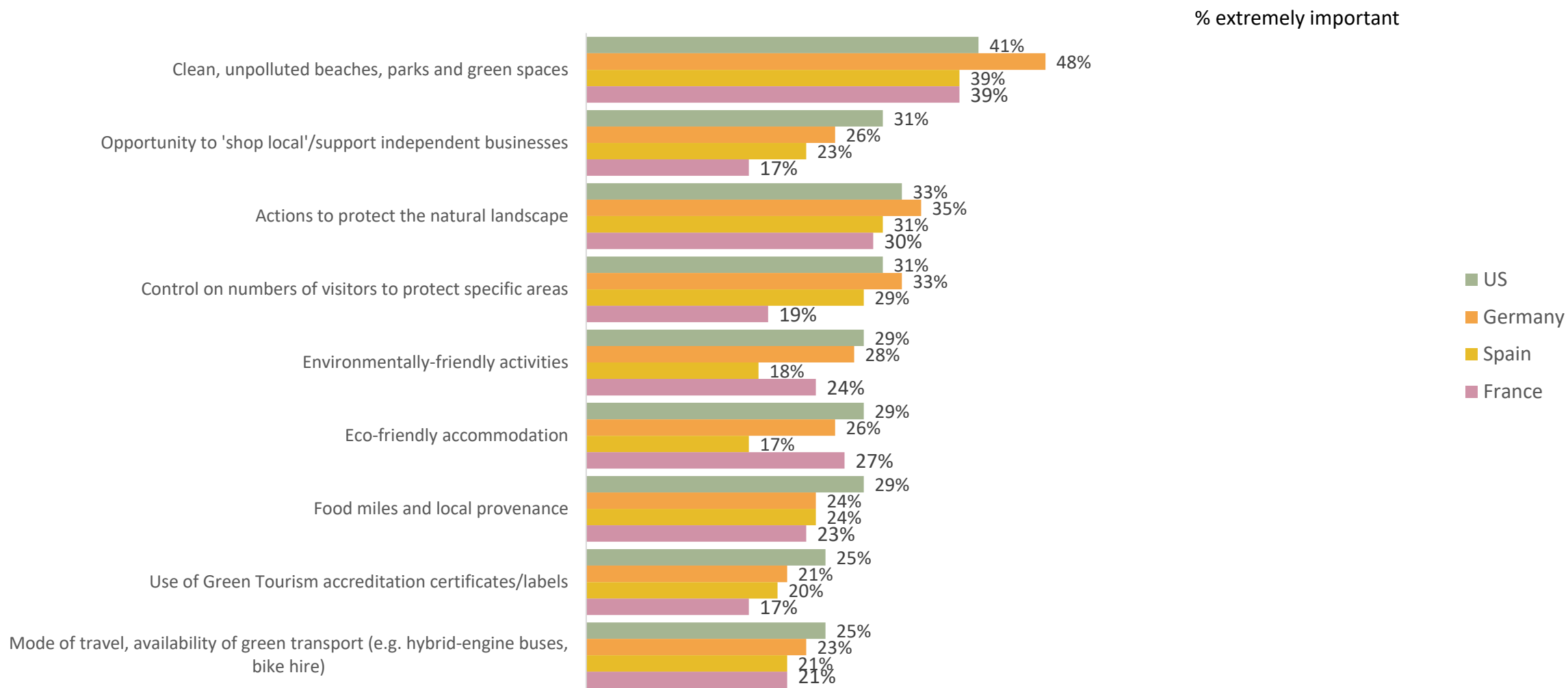
Clean beaches and protecting the natural landscape are most important for international travellers. Green certification is 'quite' or 'extremely' important to just under half of international travellers, suggesting a promotional opportunity may exist for accredited providers.



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 2,919

Sustainability Measures

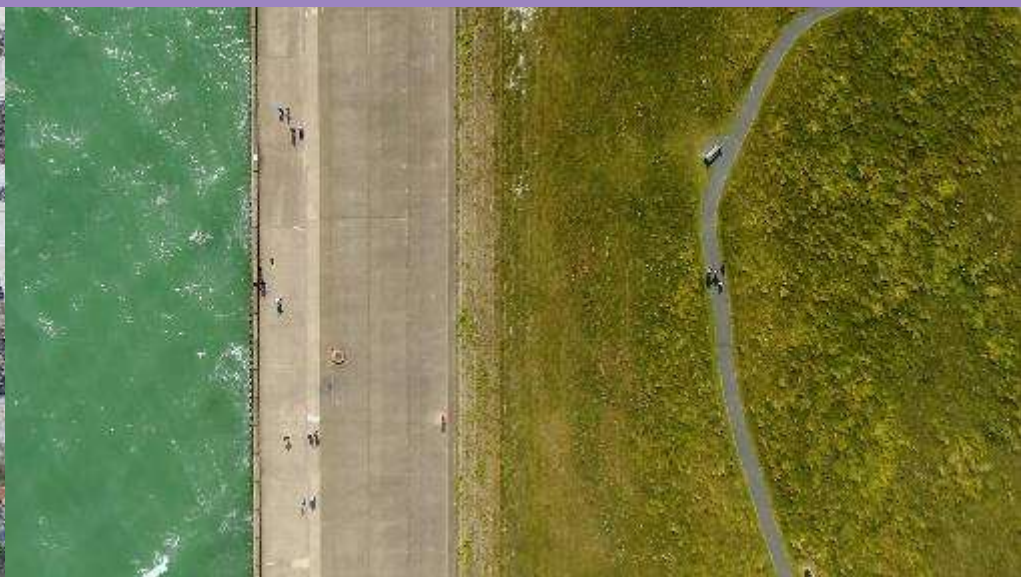
Views are similar across inbound markets. People from Germany are most concerned around cleanliness. 'Shop Local' has a mixed response with Germans much more likely to see it as important than people from France in particular. The US appear to be more interested in environmental activities, eco friendly accommodation and Green Tourism accreditations.



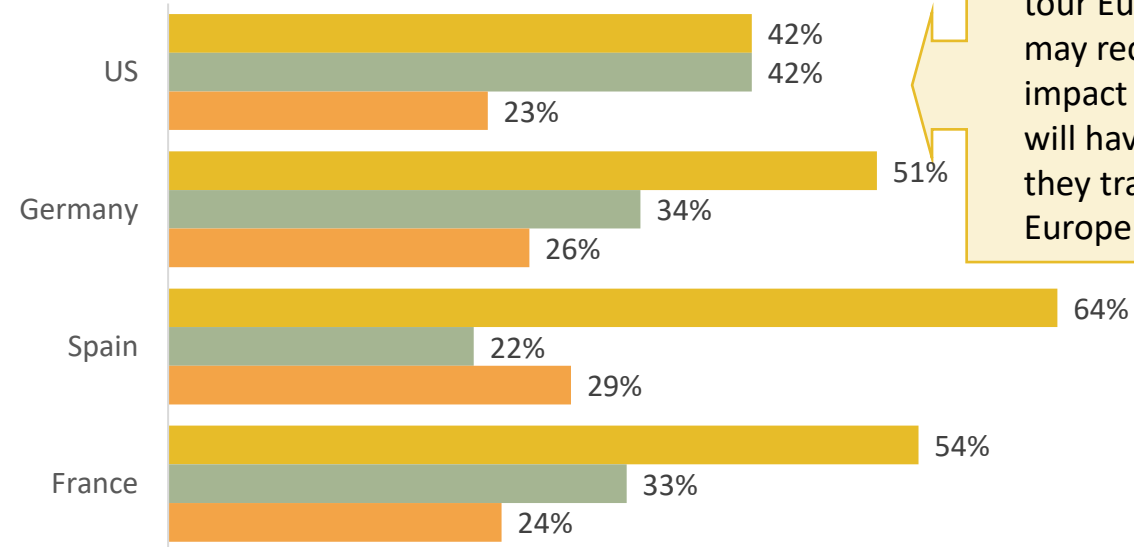
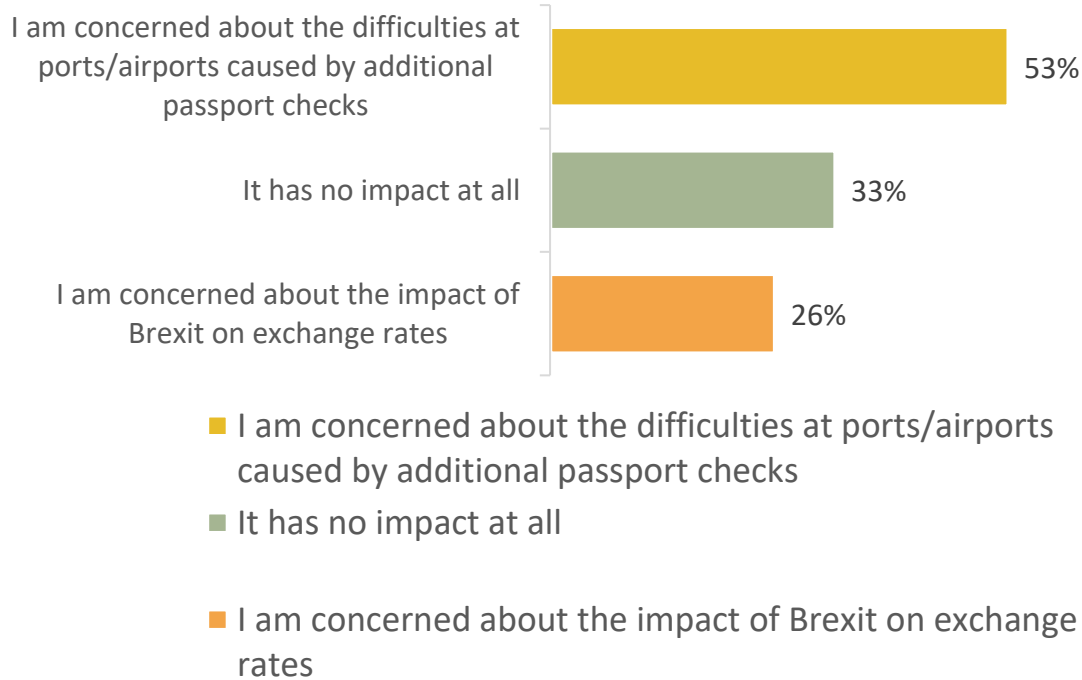
Q31 When you are visiting somewhere in England on a short break or holiday, how important is it to you that the business or attraction is demonstrating these sustainability measures? Base: All 2,919



Brexit



Port and airport difficulties are the biggest Brexit concerns, particularly for those from Europe. A quarter expect a negative impact on exchange rates and a third expect no impact.



Many US travellers tour Europe and so may recognise the impact that Brexit will have should they travel from Europe to Britain

- Younger people tend to be more concerned by port of entry/exit difficulties, while more older people worry about exchange rates
- Those who **have** visited England before are **more concerned** about Brexit than those who haven't
- Those visiting alone are much less concerned by potential impacts of Brexit on border controls or exchange rates
- Buzzseekers are most concerned of all segments by the impact of Brexit on passport checks



Action Areas



Action Areas

- Activity to raise core awareness and knowledge of Kent is important and should be considered alongside brand building activity
- Alongside this activity is a need to communicate the strength of the current Kent offer across the range of experiential activities, accommodation options etc.
- The overall strengths of Kent are a broad spectrum across history/heritage, the natural environment and the range of outdoor activities. This provides a great foundation to build a stronger proposition that is unique and compelling for Kent, building on the more generic English profile.
- Given the usage of guidebooks, attraction websites, brochures and leaflets among inbound travellers, provision of translated content may be beneficial.
- Potential opportunity to increase the number of visitors from Spain through use of offers and discounts, as the Spanish are more influenced by deals than people in other countries. This links to a slightly higher interest in booking a package among people in Spain.
- Deals and offers are also a route to encouraging longer stays, which in turn would lead to higher spend.
- Providing clear transport advice for inbound travellers, particularly those from the US, both around public transport routes and times is important, as is information on taxi/private hire services as many inbound visitors will arrive without a car. Past research by VisitBritain has highlighted the challenge of the last '6 miles' i.e. getting from the transport hub in the town/city to the more rural destination. This is an important consideration also when promoting individual experiences to the inbound audiences.
- There is a good opportunity around coach tours, that enable inbound visitors to experience several aspects of Kent in one visit. This may also be a means of accessing more remote experiences.
- Promotion of accommodation available should focus on the quality as well as the authenticity and uniqueness of it. Building a reputation for high quality accommodation has potential to be a valuable promotional message for Kent.
- Sustainability and conservation currently provide a traveller-centred message opportunity, but it is expected that in the near future the need for destinations, attractions and experiences to be environmentally responsible will increase.

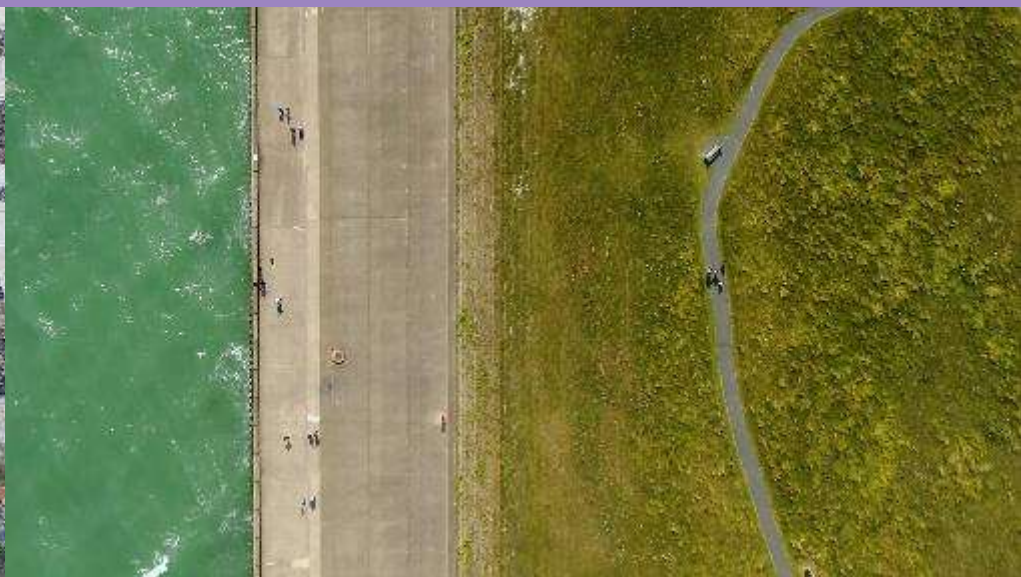


Deep Dives





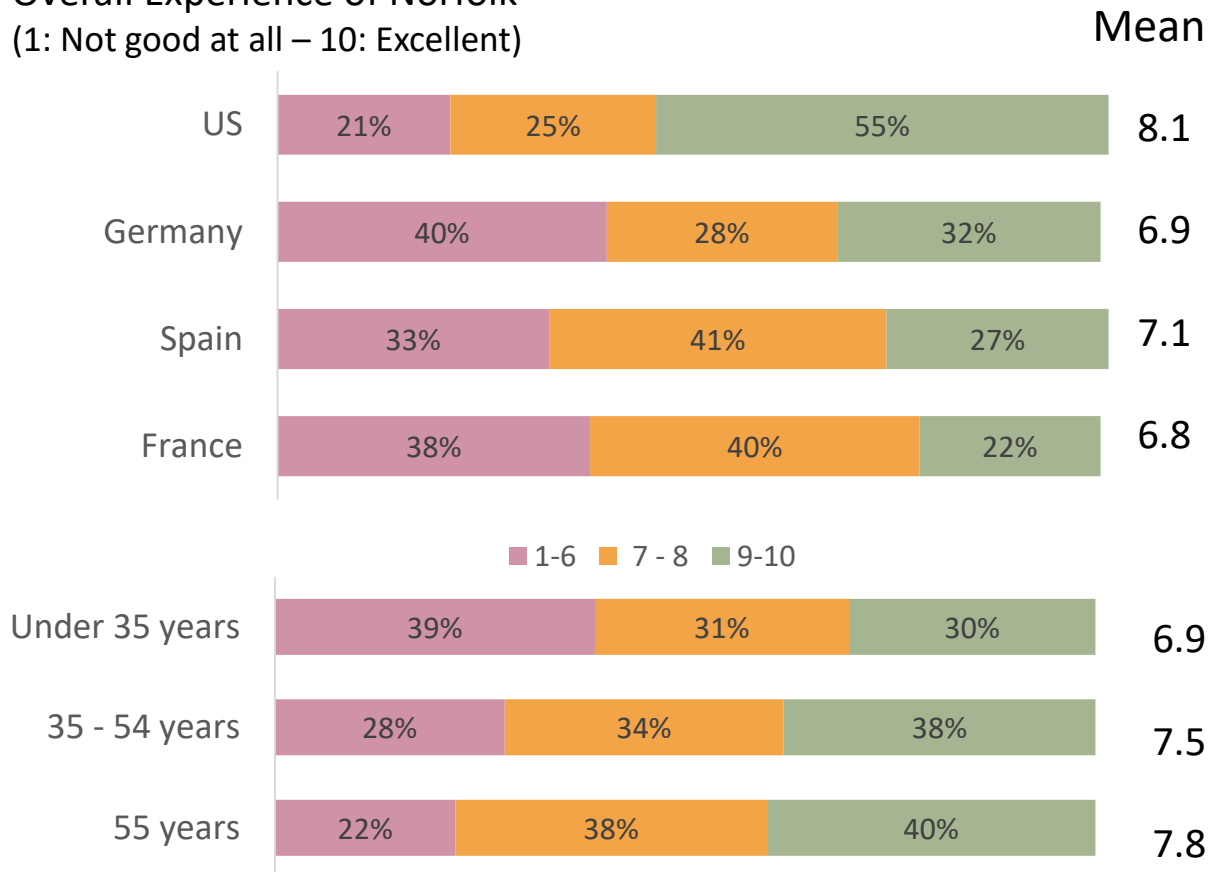
Competitor Counties – Deep Dive



Overall Experience & Recommendation: Norfolk

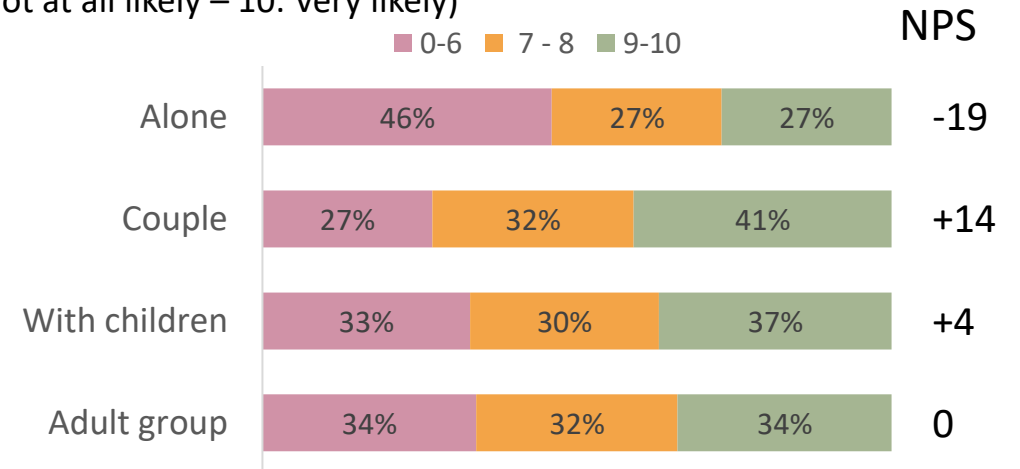
Visitors from the US score highest for overall experience of Norfolk. Older, affluent couples are the most positive about Norfolk, reflecting the broader pattern seen of regional England appealing more to that demographic group.

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



- As seen for other counties, more recent visitors tend to be a little more positive than those who visited longer ago.
- Those who typically travel alone are the least likely to recommend Norfolk, while those travelling as a couple are most likely.
- Those on low or medium incomes are less likely to recommend Norfolk than those on higher incomes.

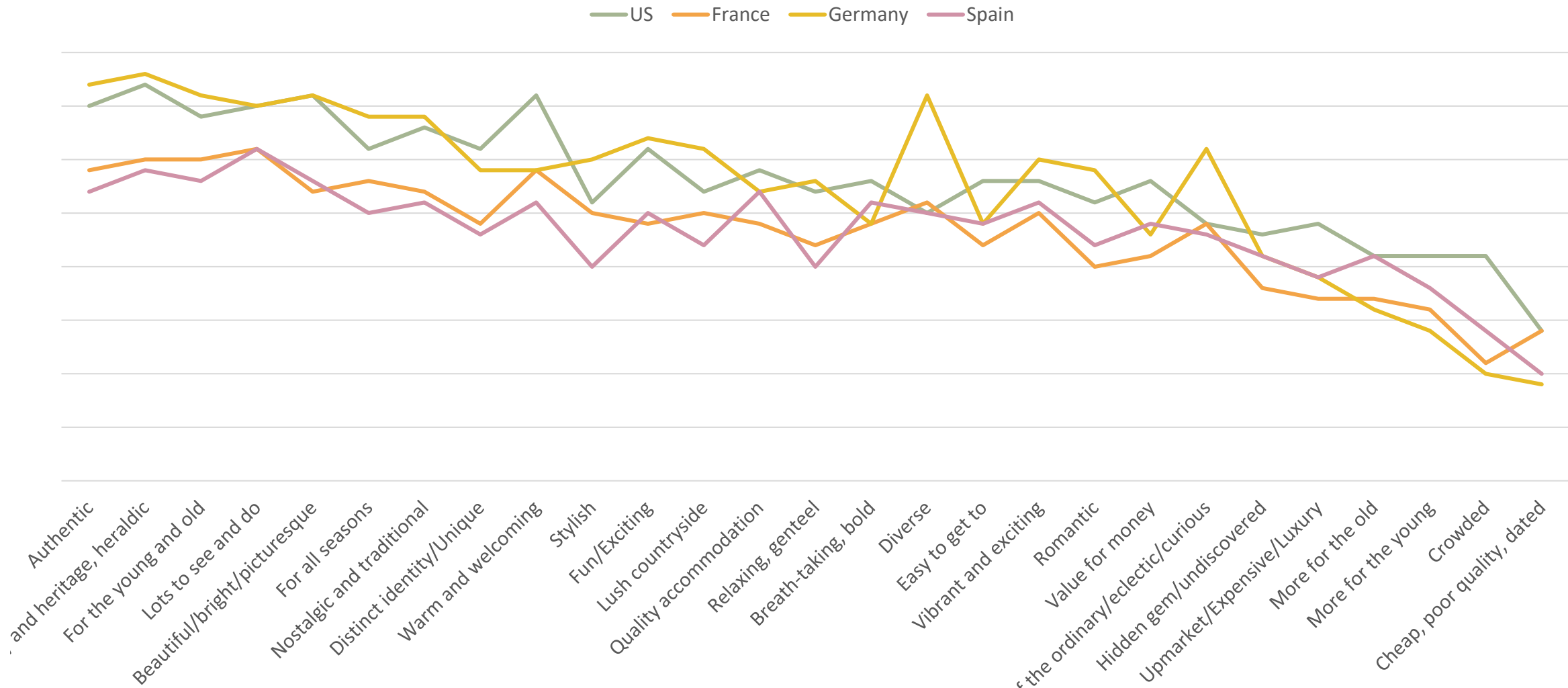
Recommendation of Norfolk (0: Not at all likely – 10: Very likely)



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 Norfolk (989).
 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 (2919) Note: NPS is calculated by % promoters minus % detractors

Norfolk Associations – Inbound Markets

Whilst the pattern is similar across countries, there are greater differences between them in their perception of Norfolk.



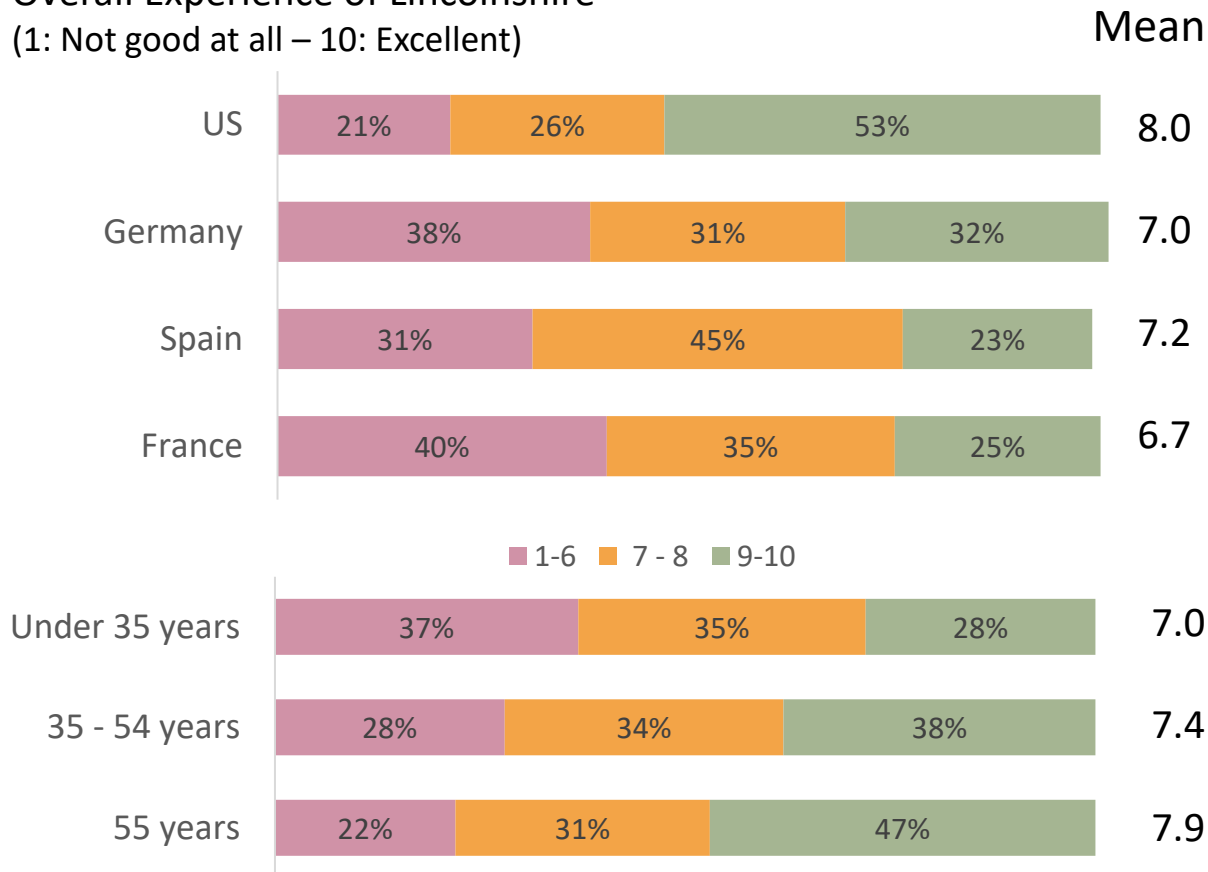
Q33 Now we are going to show you a list of things people have said about different destinations for holidays and short breaks in the UK. Thinking about each statement, please indicate which destination or destinations in each row you associate with that statement. You can select as many or as few destinations 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 (2,919)

Overall Experience & Recommendation: Lincolnshire

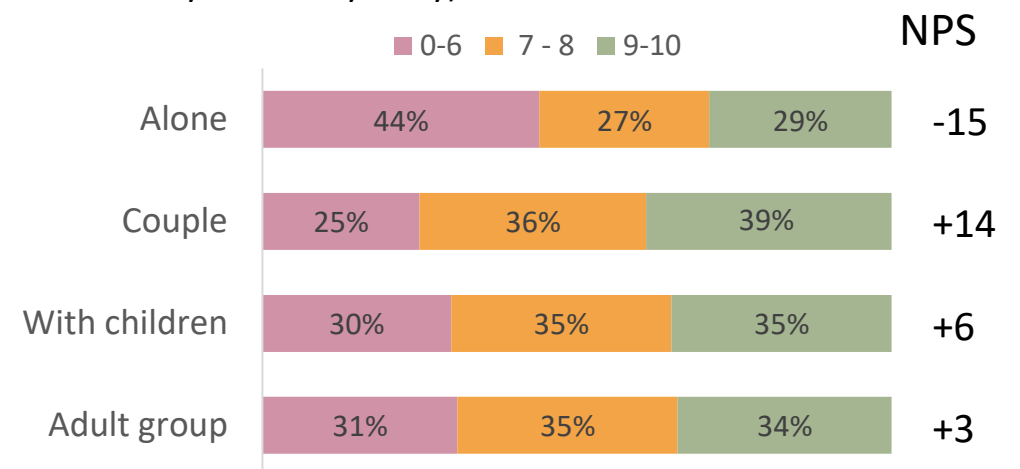
Visitors from the US score highest for overall experience of Lincolnshire. Older, affluent couples are the most positive about Lincolnshire, reflecting the broader pattern seen of regional England appealing more to that demographic group.

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



- As seen for other counties, more recent visitors tend to be a little more positive than those who visited longer ago.
- Those who typically travel alone are the least likely to recommend Lincolnshire, while couples are the most likely to recommend.

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



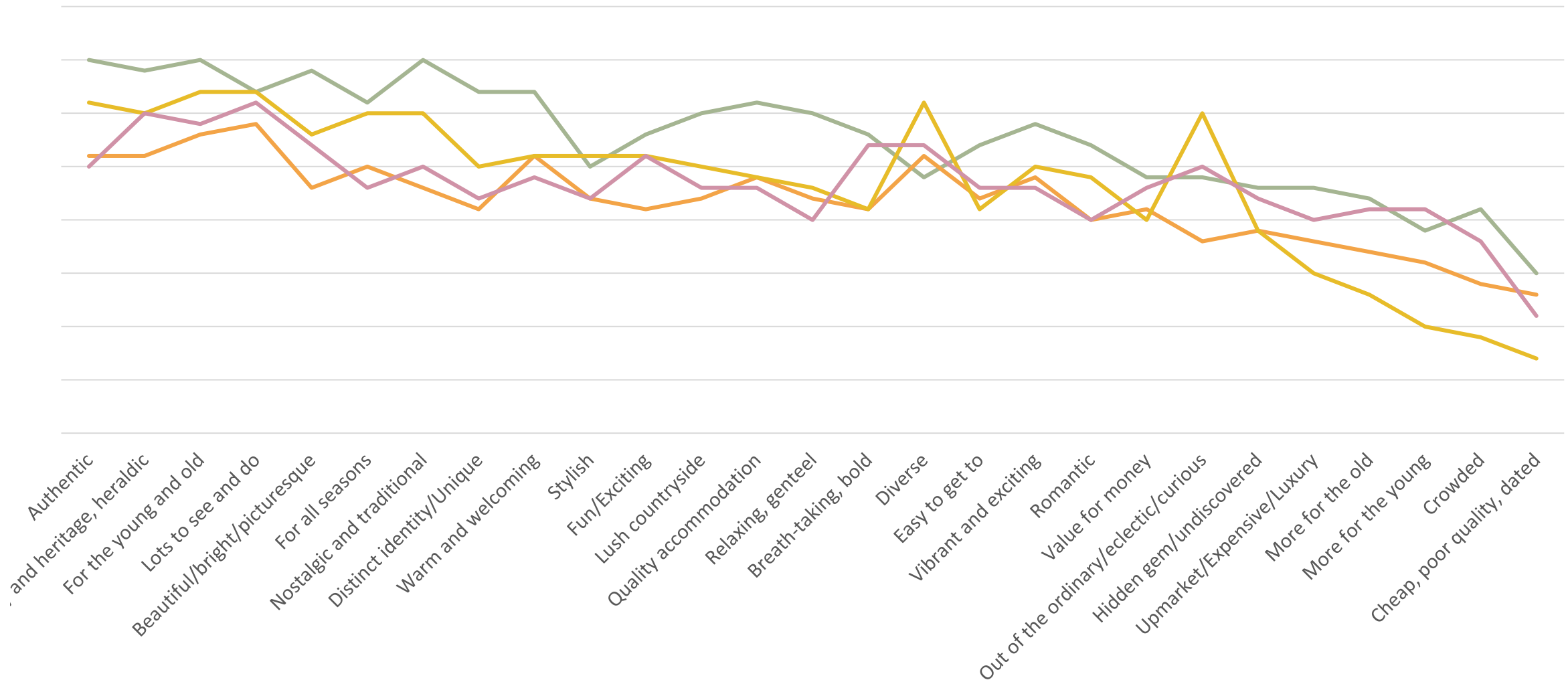
Q19 Thinking back to your most recent trip to each of these places, how would you rate your experience overall? Base: all who have visited county for a leisure trip or holiday Lincolnshire (905)

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 (2919) Note: NPS is calculated by % promoters minus % detractors

Lincolnshire Associations – Inbound Markets

Lincolnshire is most positively seen by people in the US, with Germans most likely to say it is diverse or out of the ordinary/eclectic.

— US — France — Germany — Spain



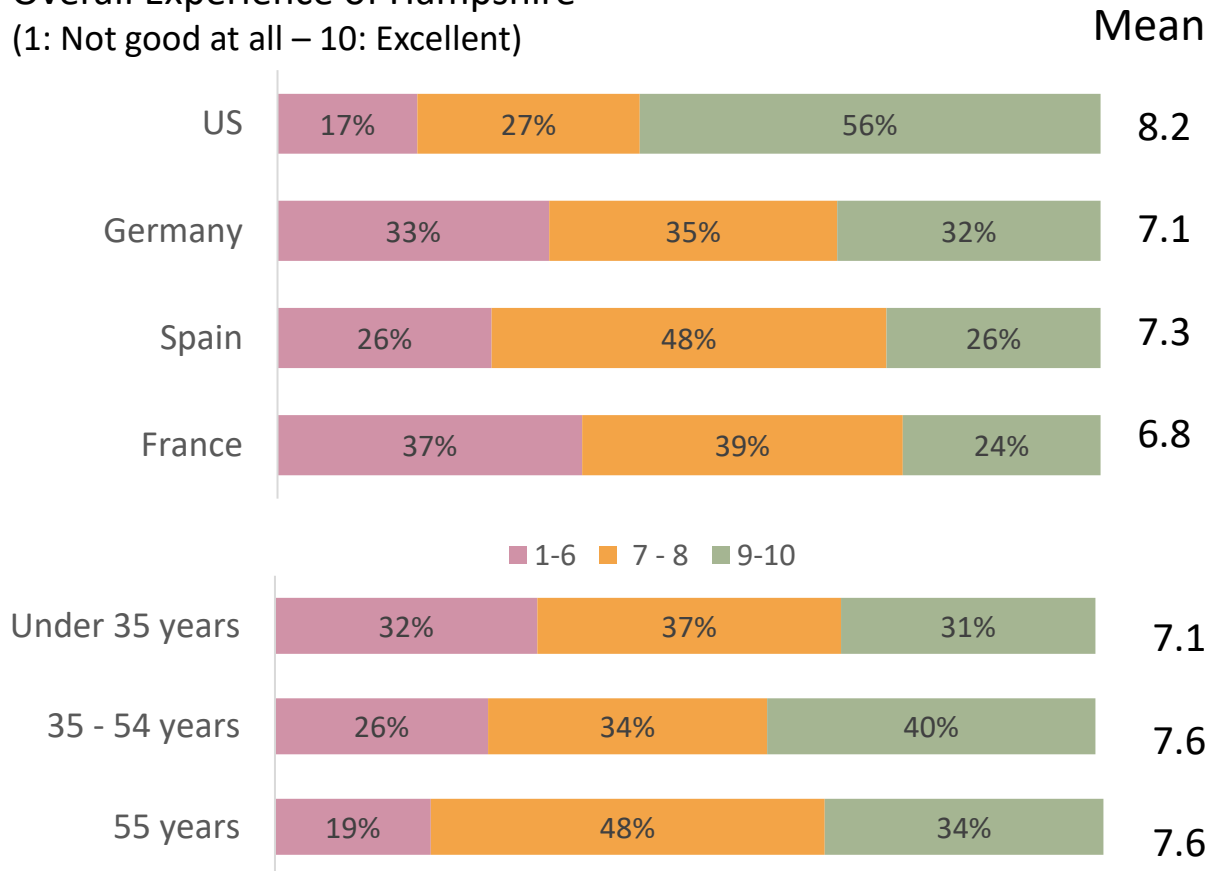
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Base: All respondents (2,919)

Overall Experience & Recommendation: Hampshire

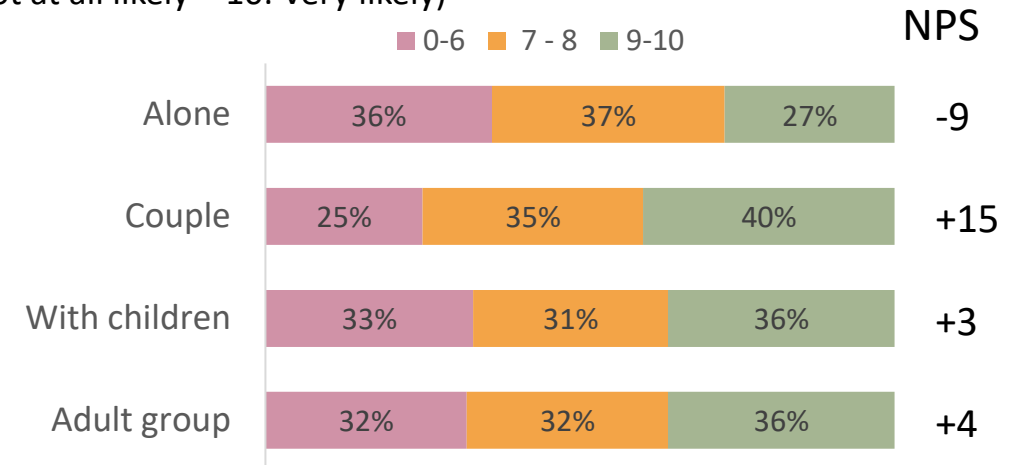
Visitors from the US score highest for overall experience of Hampshire. The county has a broader appeal than other counties, reaching a younger and less affluent audience as well as the core older affluent couples.

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



- Those aged 35 – 54 are most likely to be positive about Hampshire, suggesting a younger appeal for Hampshire compared to other counties.
- Those who typically travel alone are the least likely to recommend Hampshire, while those travelling as a couple are most likely.
- Hampshire has broader appeal across income groups, than other counties.

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



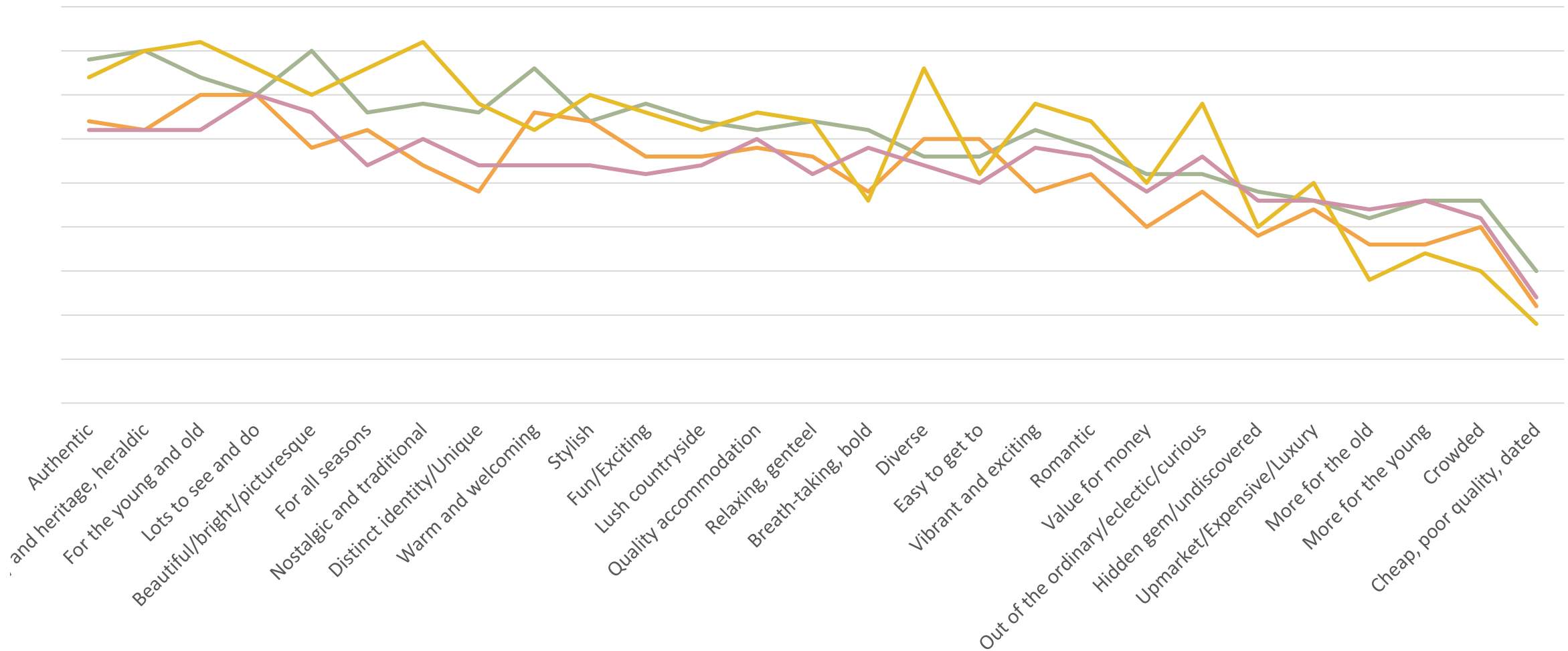
Q19 Thinking back to your most recent trip to each of these places, how would you rate your experience overall? Base: all who have visited county for a leisure trip or holiday; Hampshire (987)

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 (2919) Note: NPS is calculated by % promoters minus % detractors

Hampshire Associations – Inbound Markets

Germany and the US are generally most positive about Hampshire.

— US — France — Germany — Spain



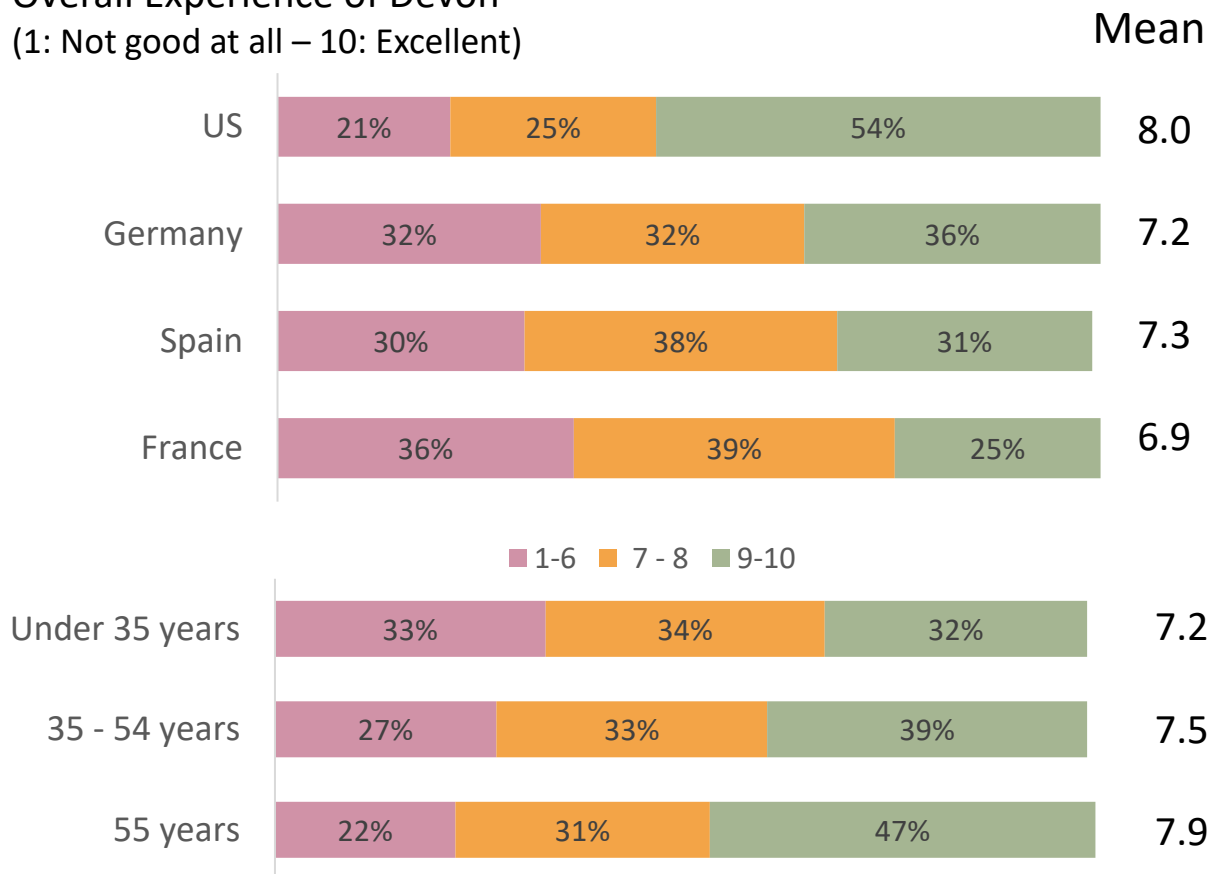
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Base: All respondents (2,919)

Overall Experience & Recommendation: Devon

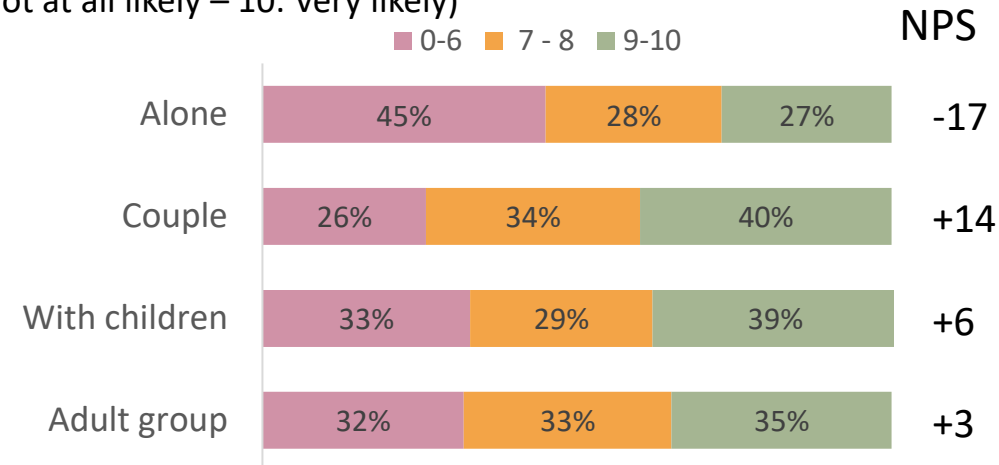
Visitors from the US score highest for overall experience of Devon. Devon has relatively higher appeal among those visiting with children than seen for other counties.

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



- Older visitors are the most positive of their experience of Devon.
- In contrast to other counties, the appeal of Devon is almost as high for families with children as it is for couples.
- Appeal is highest among more affluent people.

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

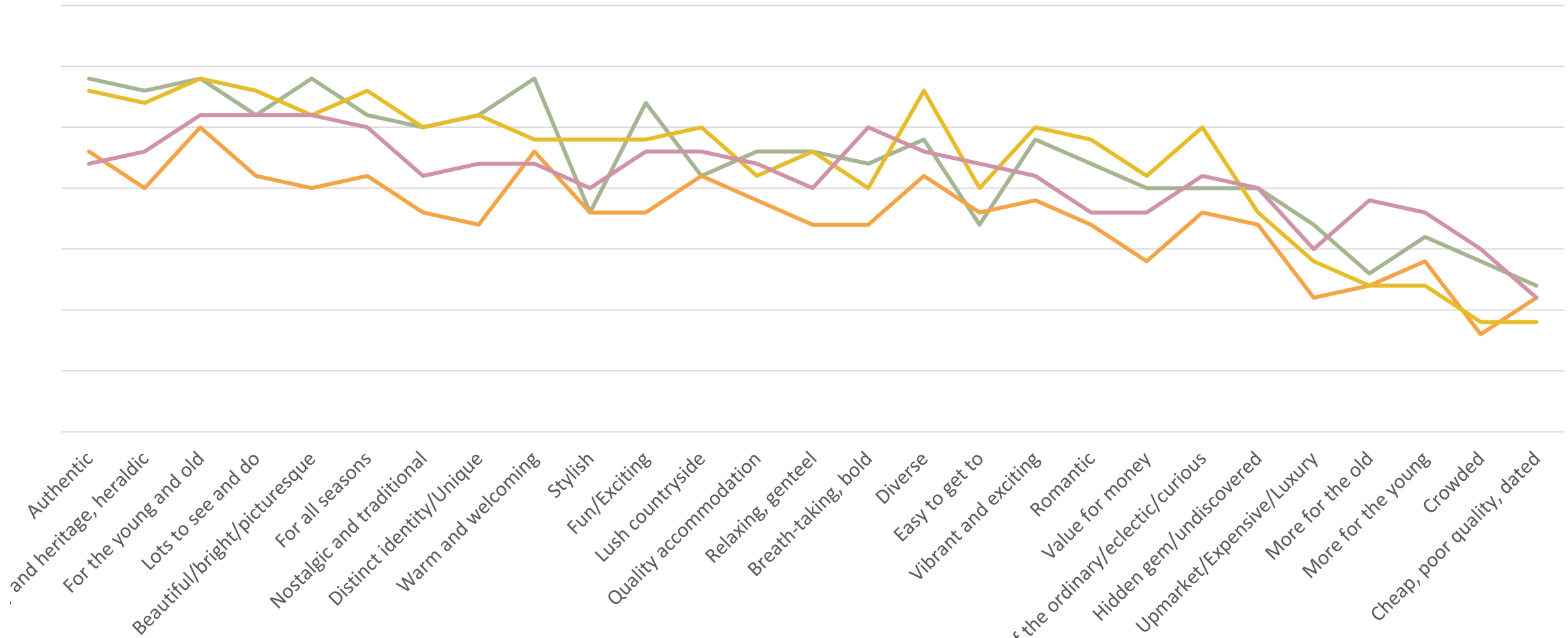


Q19 Thinking back to your most recent trip to each of these places, how would you rate your experience overall? Base: all who have visited county for a leisure trip or holiday; Devon (1,459)
 Q20 And how likely is it that you would recommend a holiday or short trip to each of these places to a friend or colleague? Base: All respondents (2919) Note: NPS is calculated by % promoters minus % detractors

Devon Associations – Inbound Markets

People in France associate least with Devon

— US — France — Germany — Spain



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 (2,919)

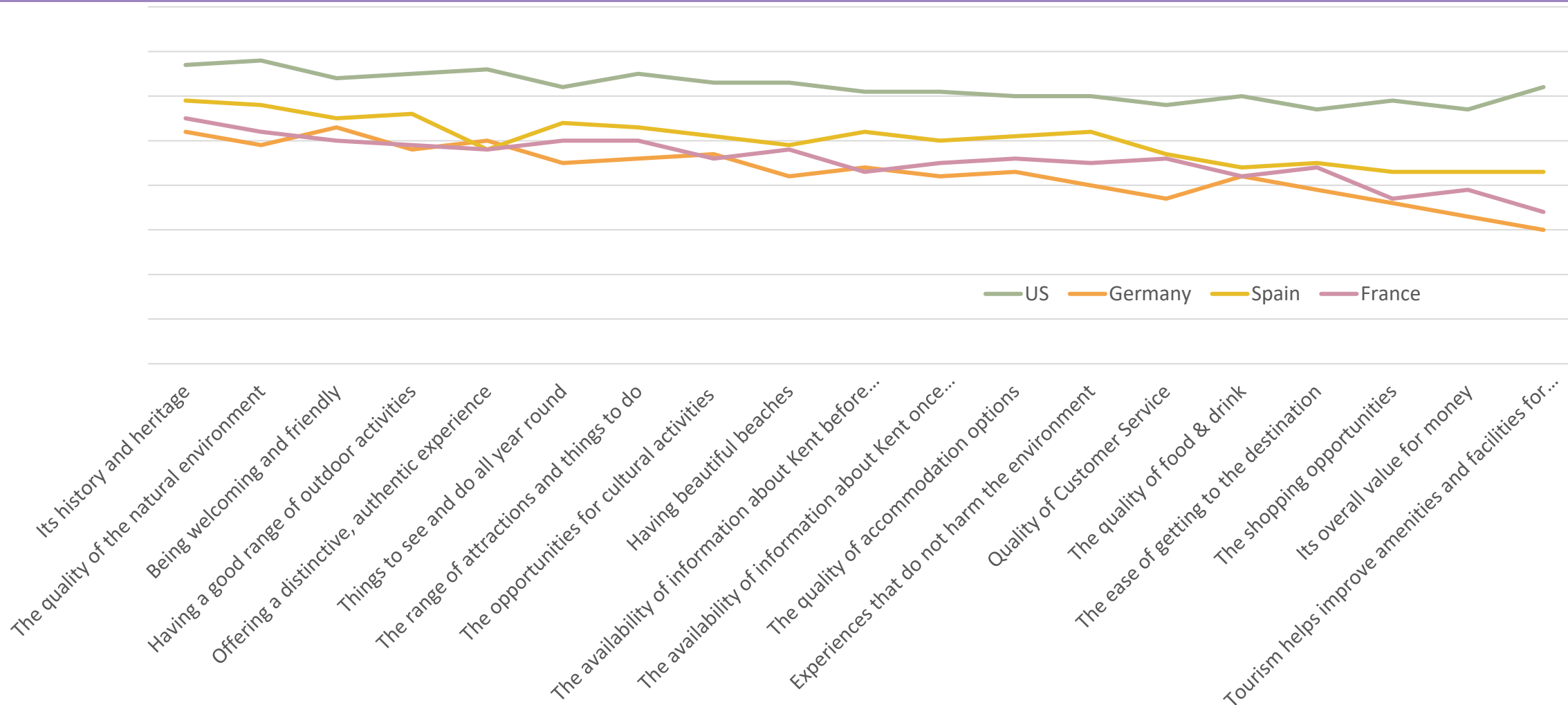


Opinions/Expectations of Kent – Deep Dive



Opinion/Expectations

People in the US are generally more positive in their opinions and expectations of Kent

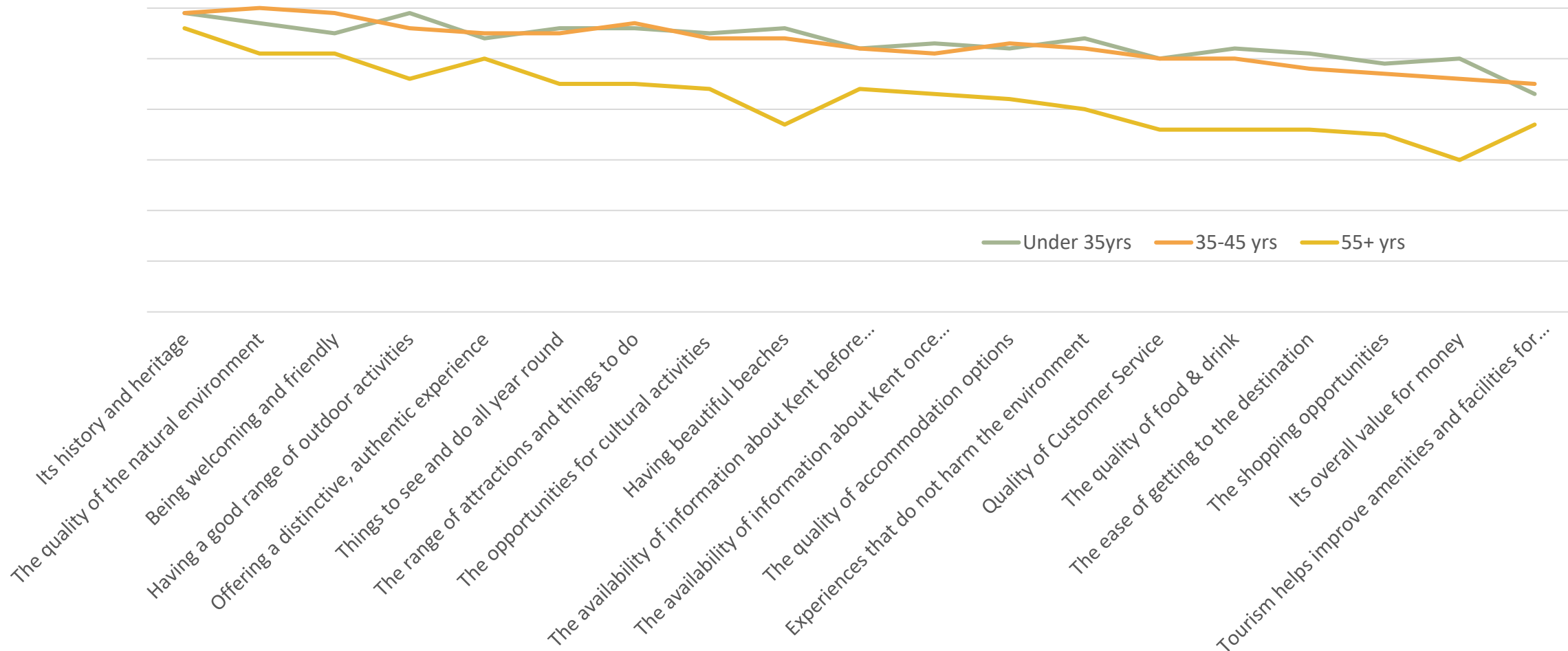


Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
 Base: all respondents (2,919)

Net: rating very good or excellent

Opinion/Expectations

Older people are less likely to rate aspects as very good or excellent and they are more likely to say they 'don't know'. The biggest differences are beautiful beaches and value for money.

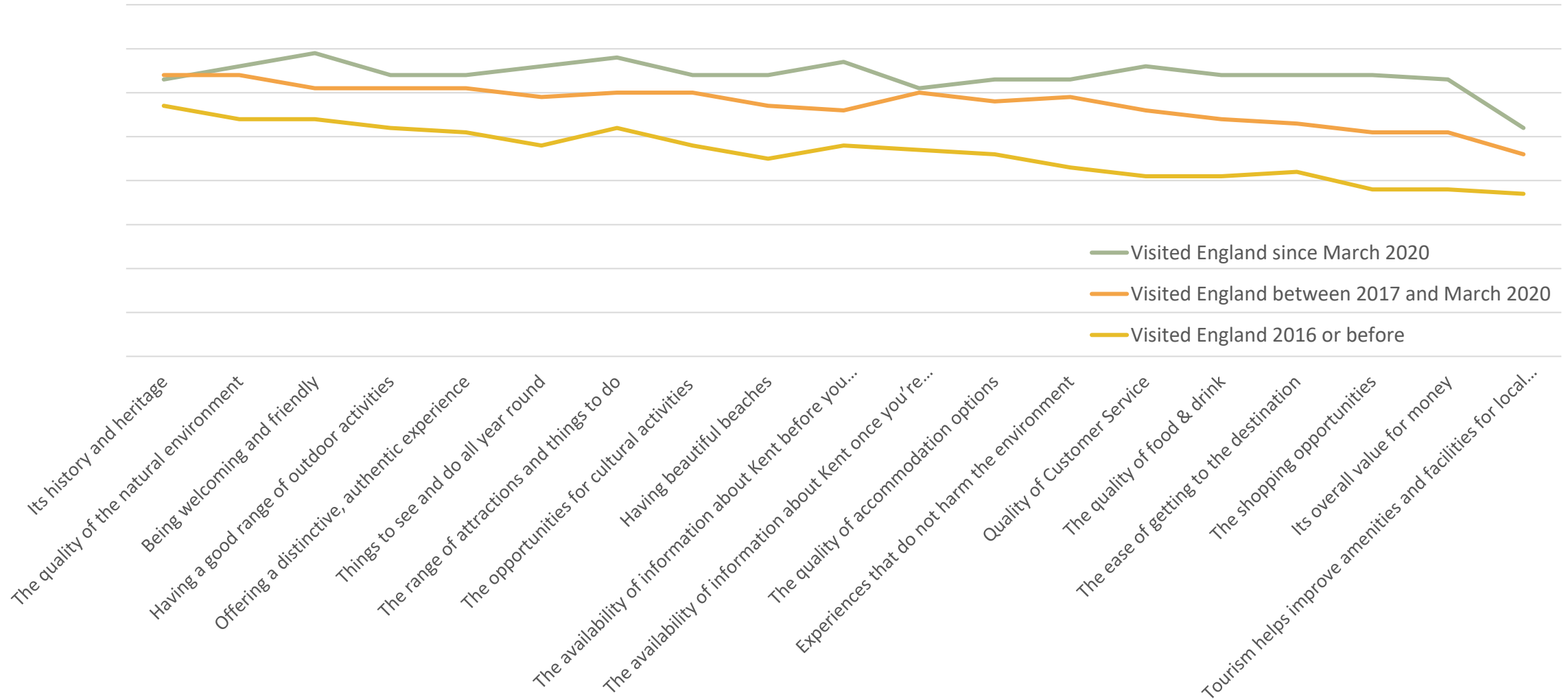


Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
 Base: all respondents (2,919)

Net: rating very good or excellent

Opinion/Expectations

Typically more recent visitors to England have more positive perceptions of Kent.

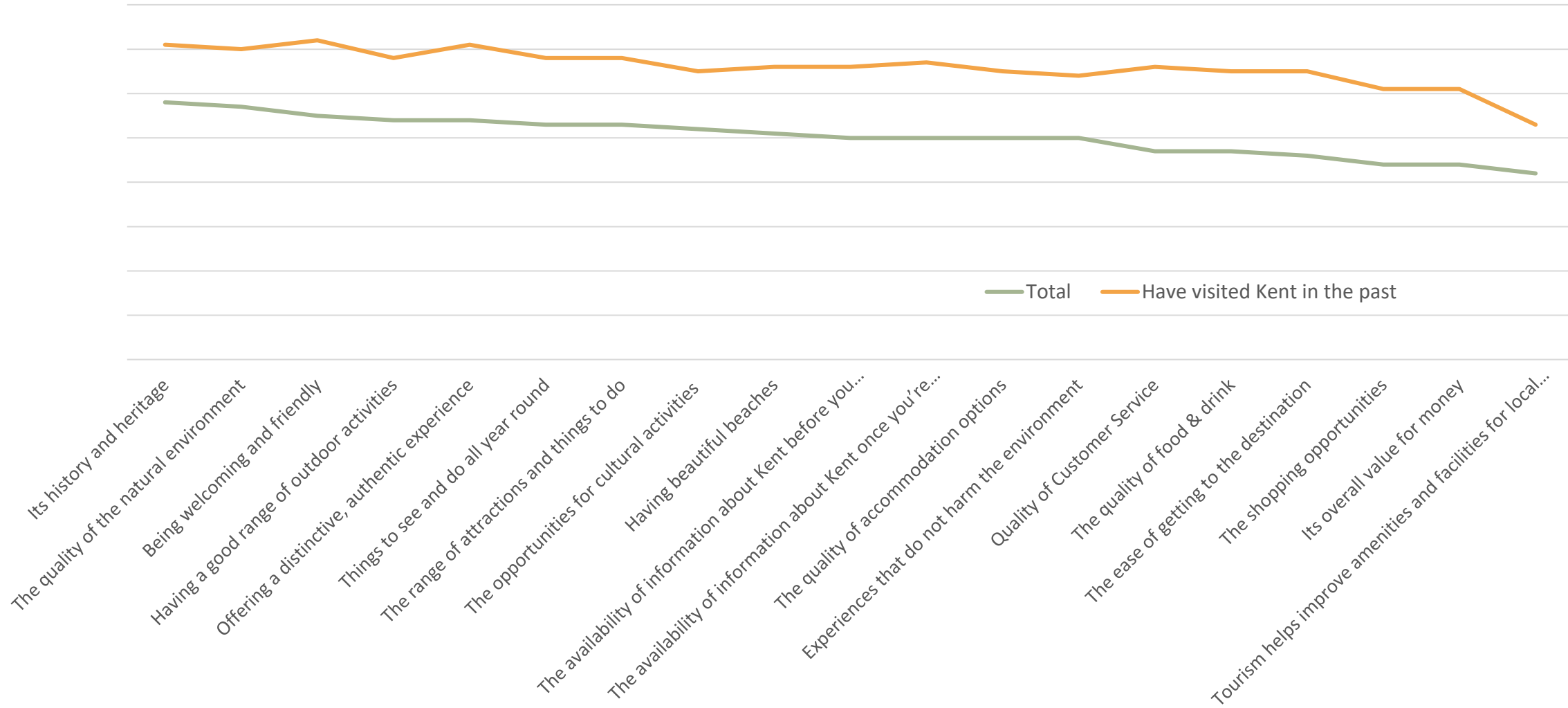


Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
 Base: all respondents (2,919)

Net: rating very good or excellent

Opinion/Expectations

Those who have visited Kent are more positive, particularly around the food & drink, quality of service and ease of getting to Kent.

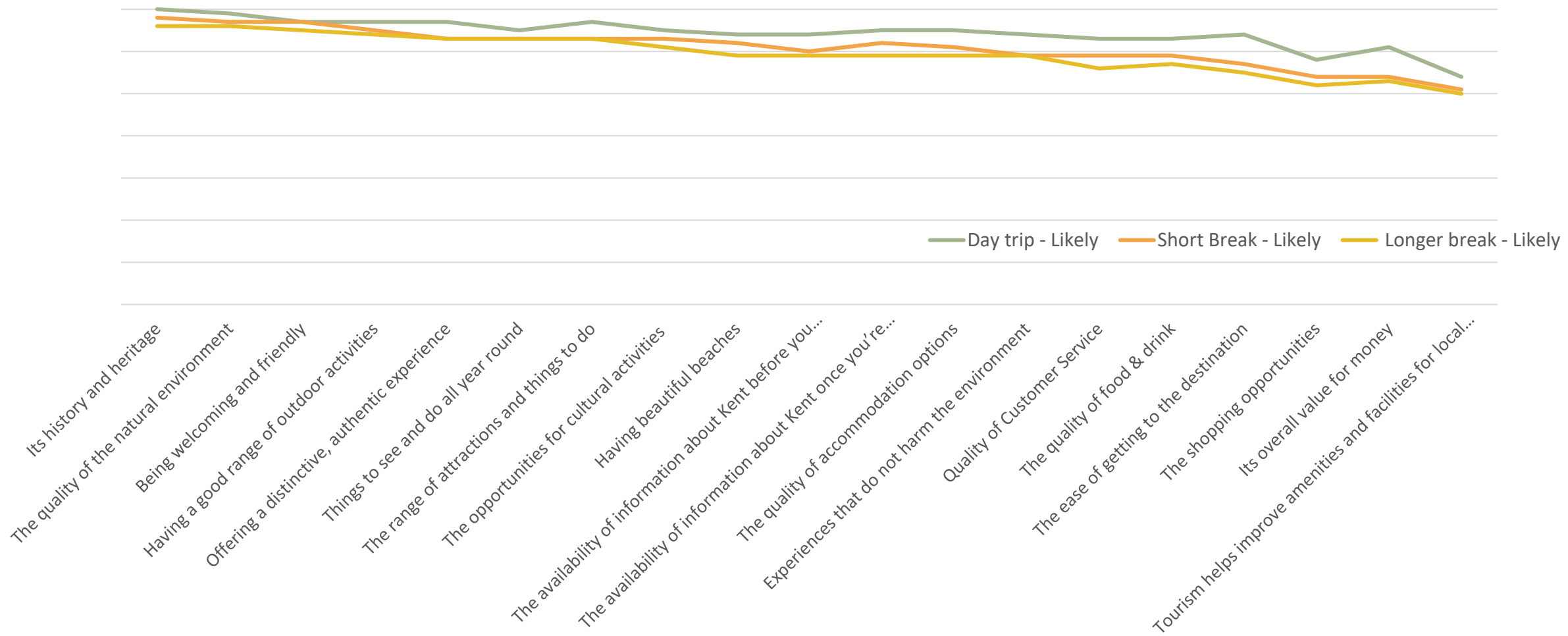


Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
 Base: all respondents (2,919)

Net: rating very good or excellent

Opinion/Expectations

Perceptions are similar across those who would consider a short or longer break. Day trip considerers are slightly more positive on most attributes.

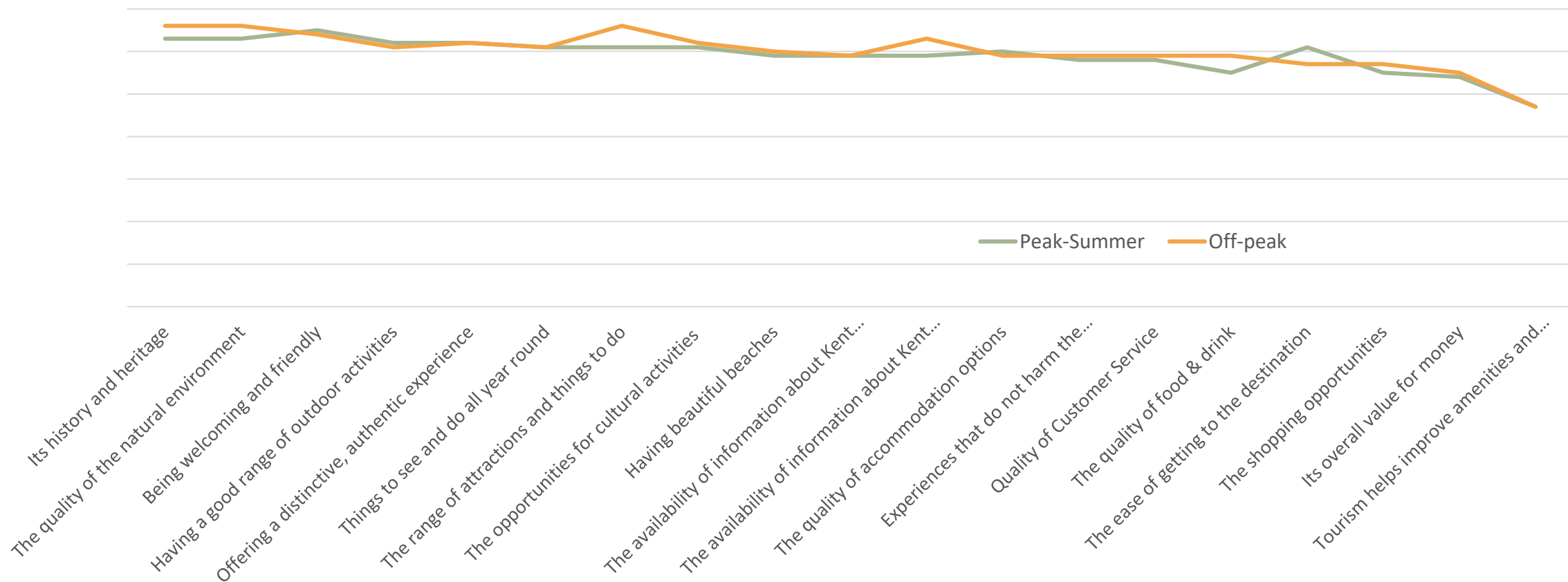


Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
 Base: all respondents (2,919)

Net: rating very good or excellent

Opinion/Expectations

Only real difference is that those who would come off peak are more positive about there being things to do all year

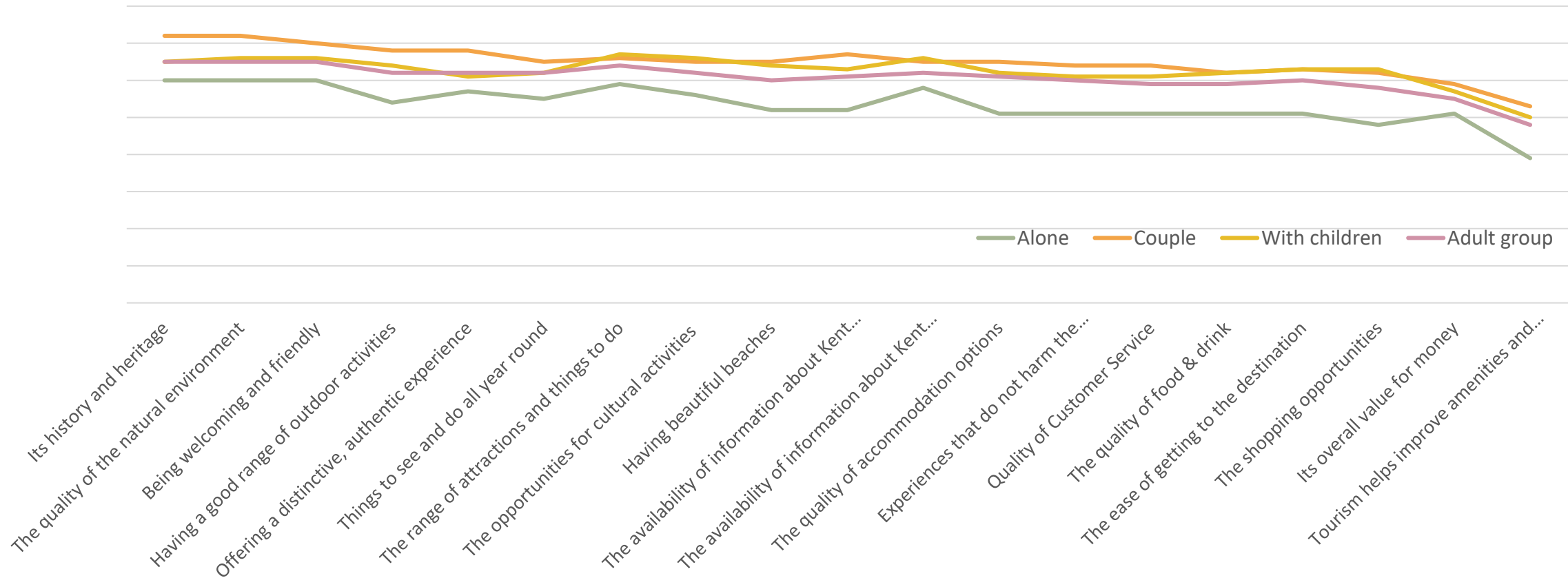


Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
Base: all respondents (2,919)

Net: rating very good or excellent

Opinion/Expectations

Solo travellers the least positive

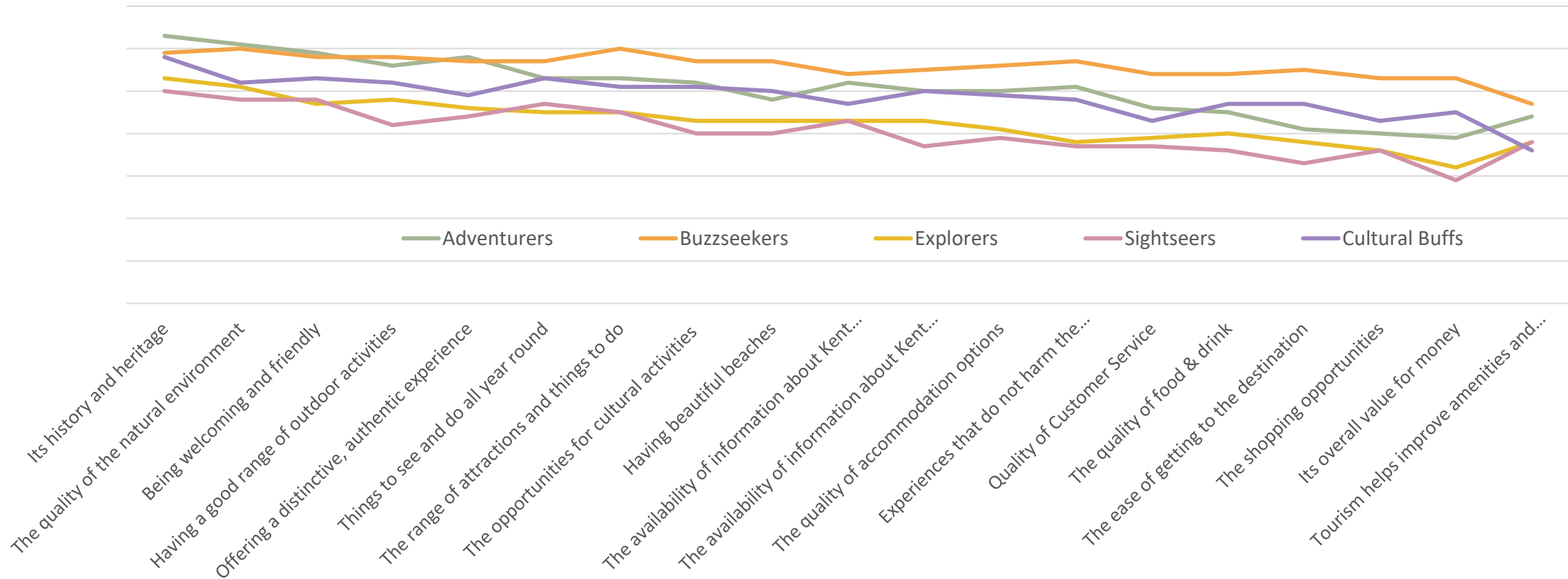


Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
 Base: all respondents (2,919)

Net: rating very good or excellent

Opinion/Expectations

Buzzseekers the most positive, Sightseers the least so.



Q37 Based on your knowledge or expectations, please rate Kent on each of the following attributes?
 Base: all respondents (2,919)

Net: rating very good or excellent

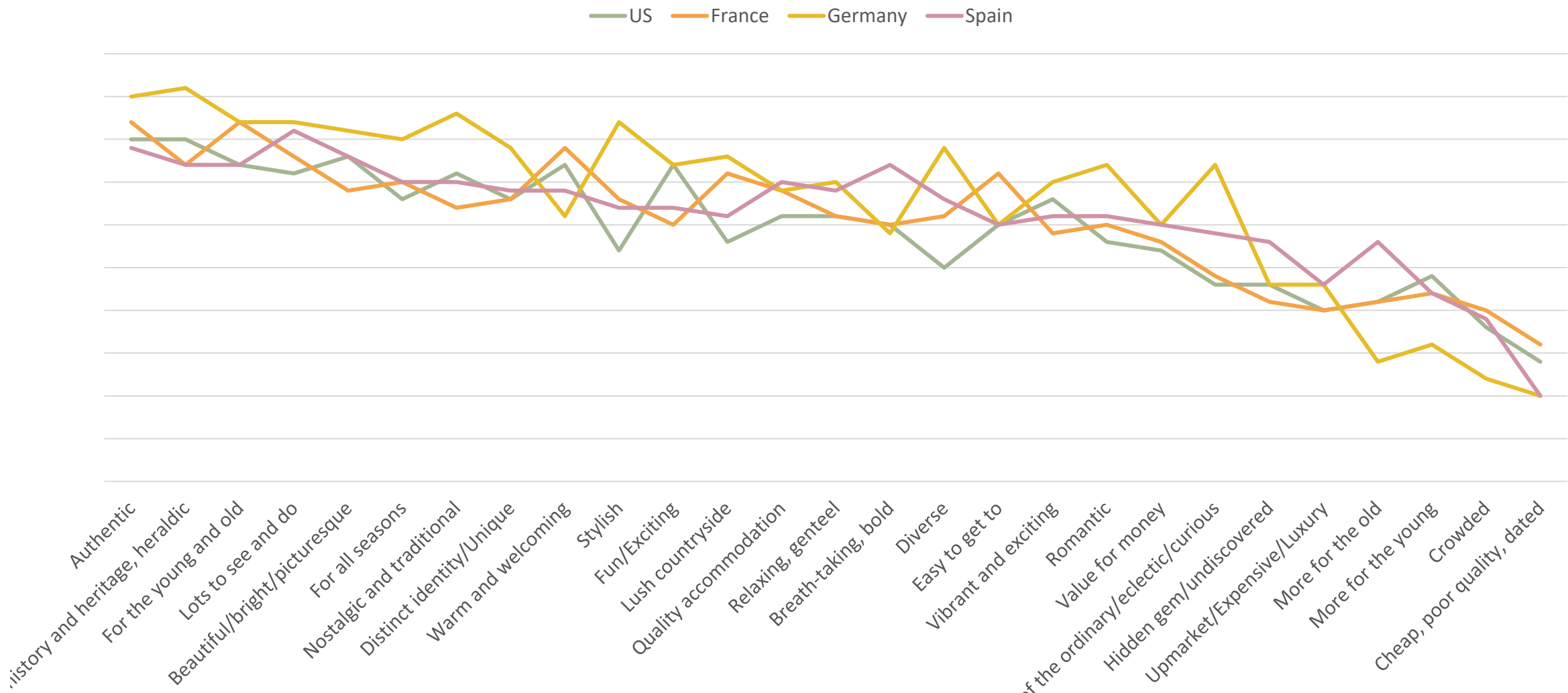


Kent Associations – Deep Dive



Kent Associations – Inbound Markets

The biggest contrasts are between the US and Germany around stylish, diverse and out of the ordinary

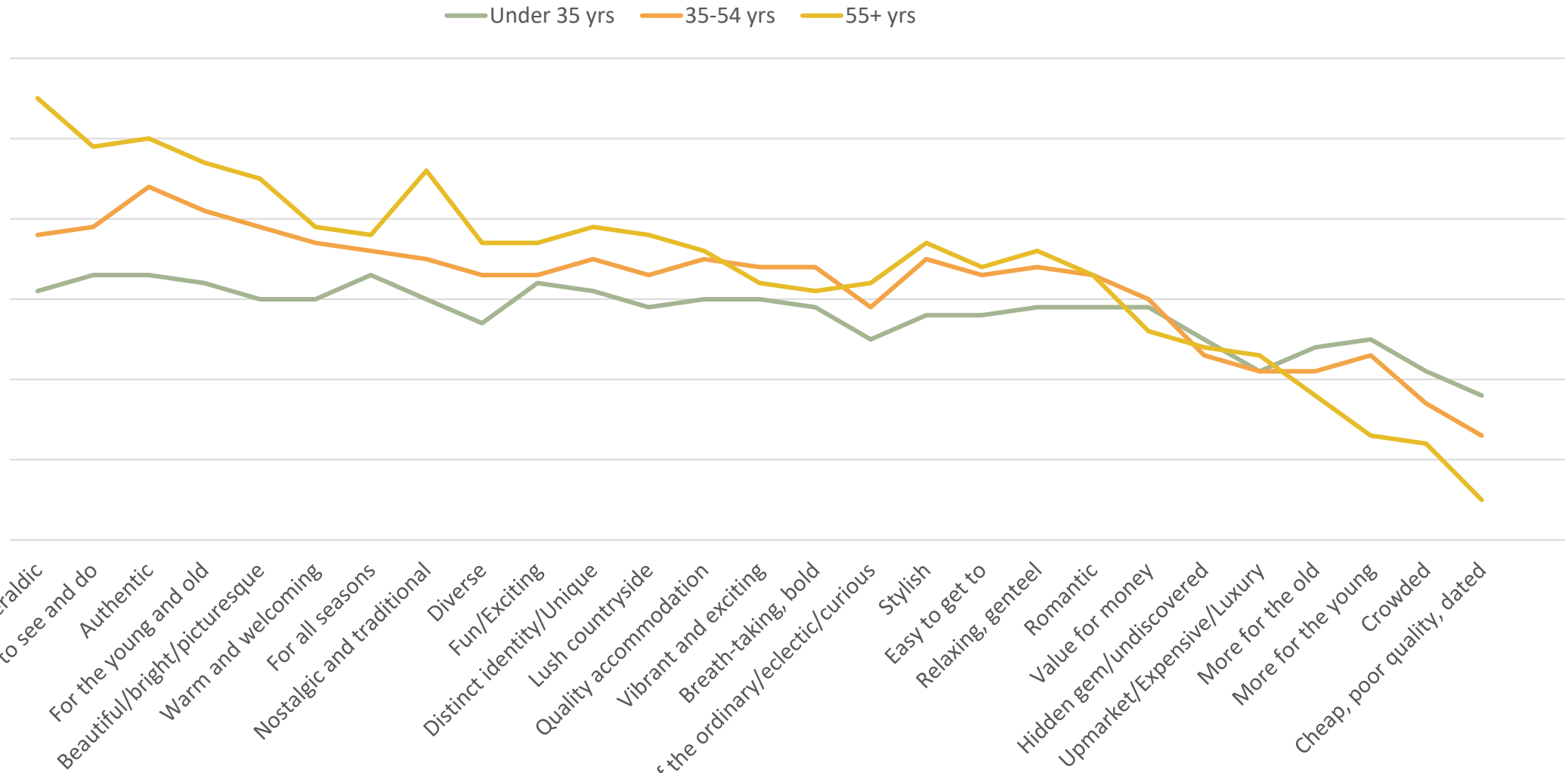


Q33 Now we are going to show you a list of things people have said about different destinations for holidays and short breaks in the UK. Thinking about each statement, please indicate which destination or destinations in each row you associate with that statement. You can select as many or as few destinations 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 (2,919)

Kent Associations – Age Groups

Younger people have less positive associations than other age groups.
Those over 55 years most strongly associate Kent with its history & heritage

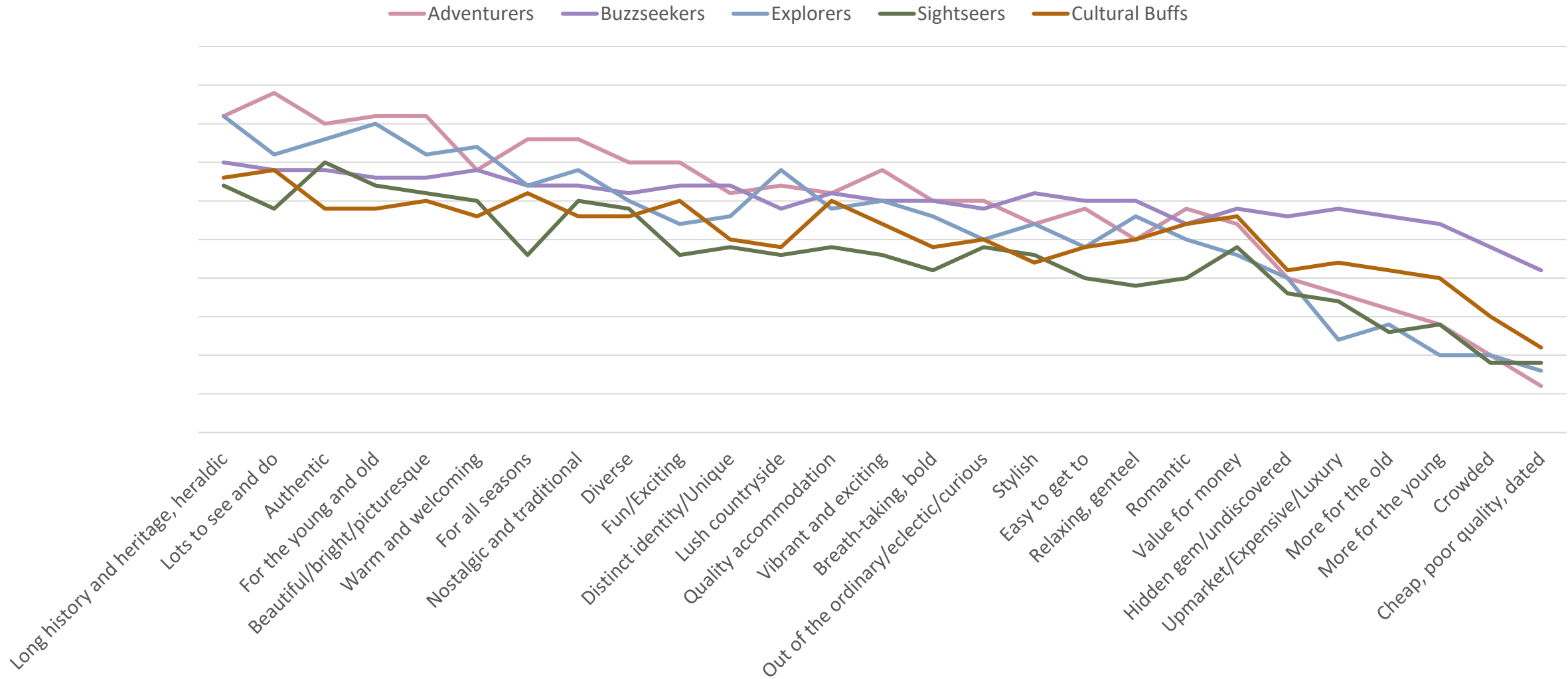


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Base: All respondents (2,919)

Kent Associations – Segmentation

Adventurers are most positive around history, things to do and authenticity. Buzzseekers are more likely to have some negative associations with Kent around quality, and it being crowded

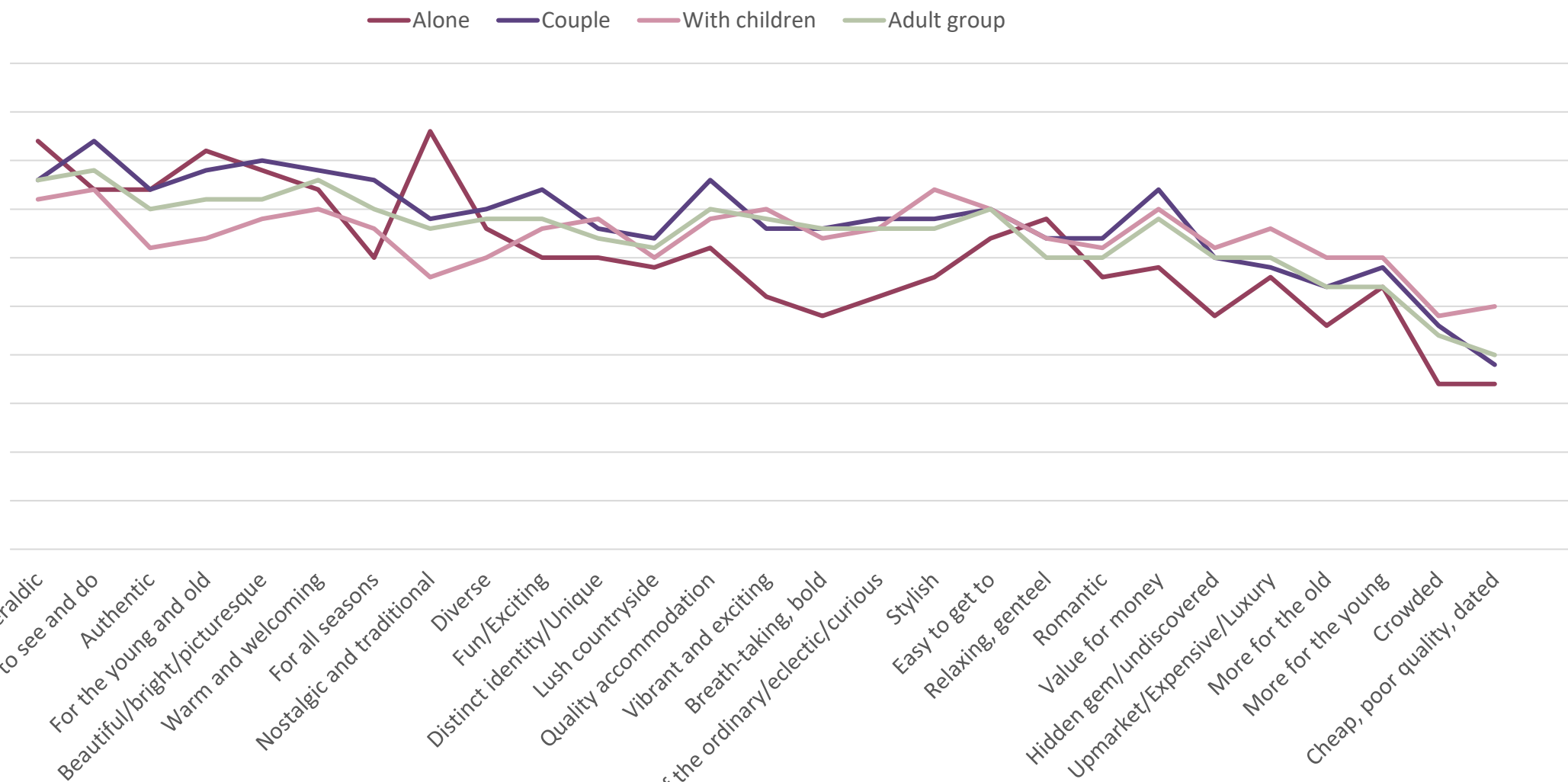


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Base: All respondents (2,919)

Kent Associations – Visitor Group

Those visiting alone tend to have a different and generally less positive view of Kent than those visiting as a couple or group

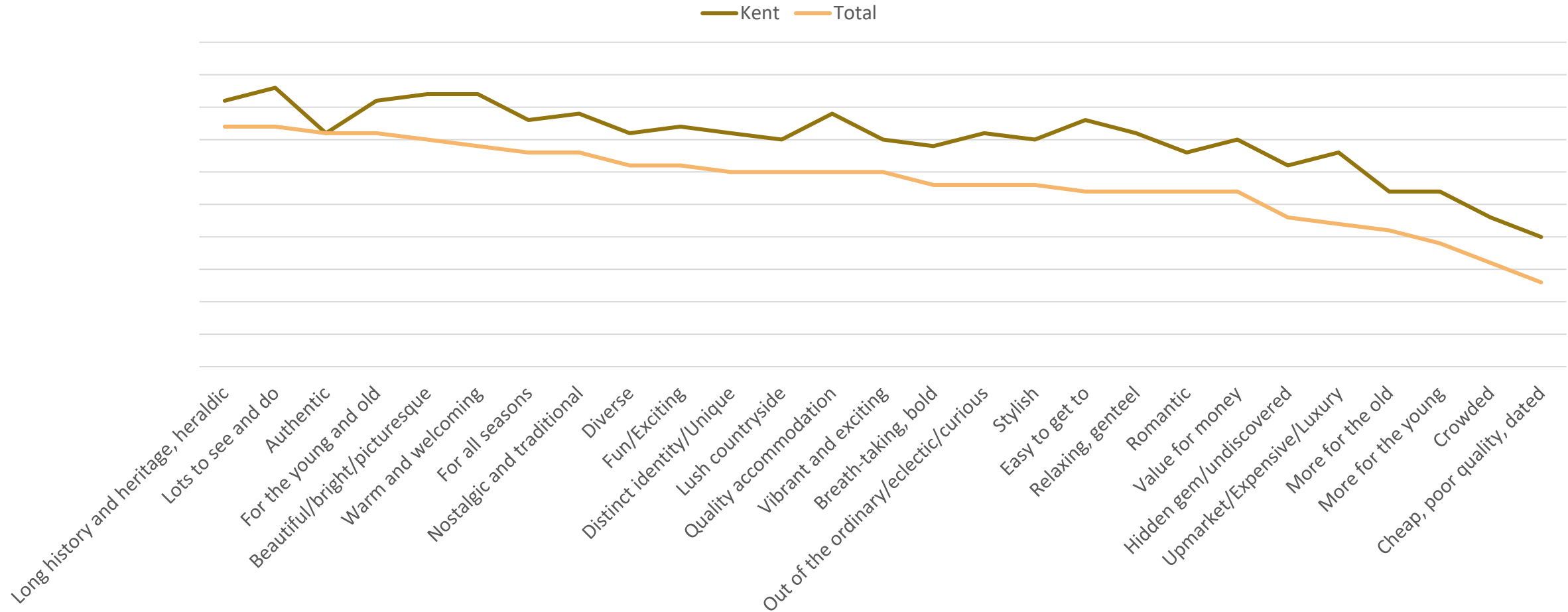


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Base: All respondents (2,919)

Kent Associations – Past Kent Visitors

As would be expected those who have visited Kent before are more positive, except in their perceptions of lots to see and do. This may well be because perceptions of the offer are positive, though it may also be that there is not quite as much as people expect.



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 (2,919)

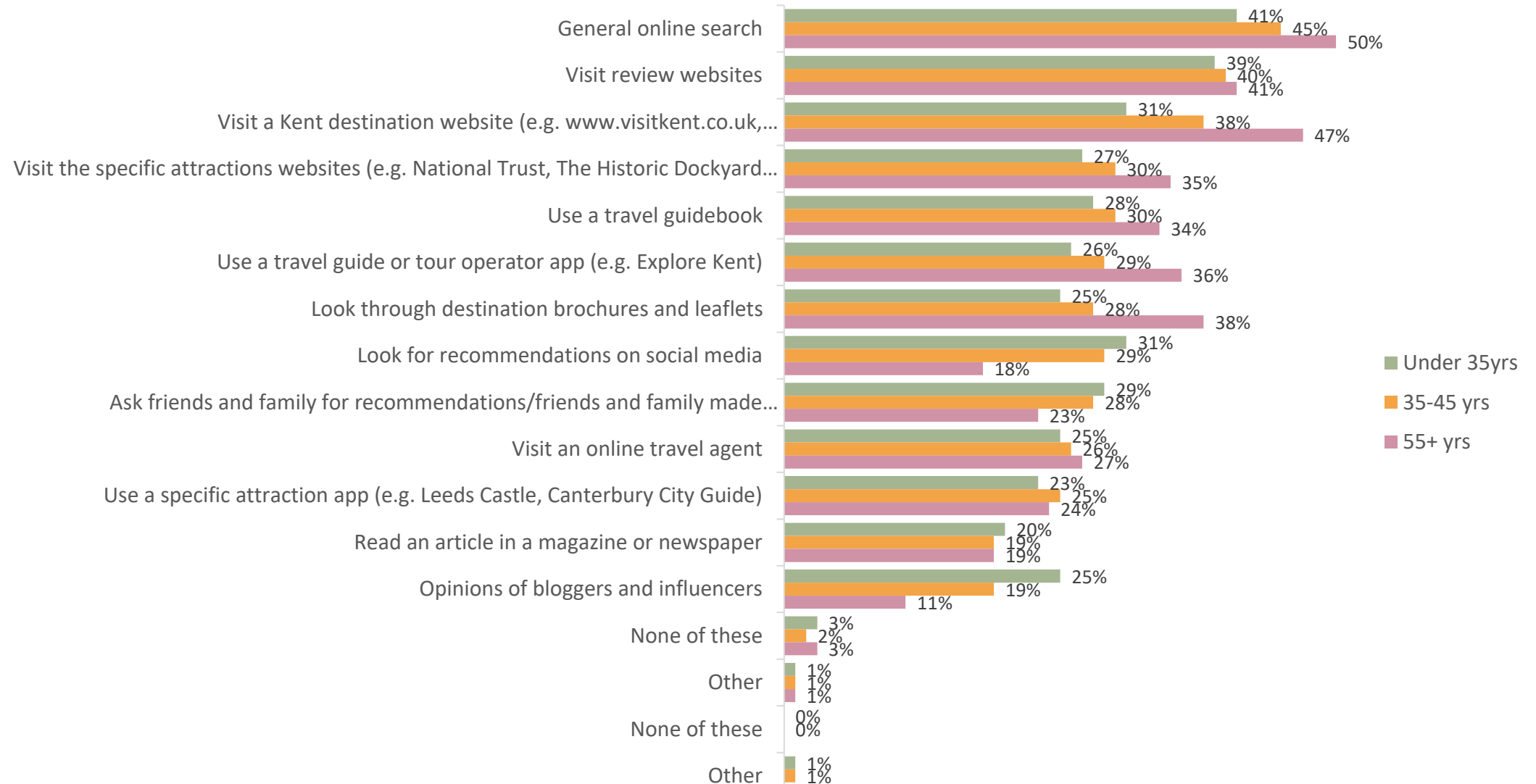


Sources on Information – Deep Dive



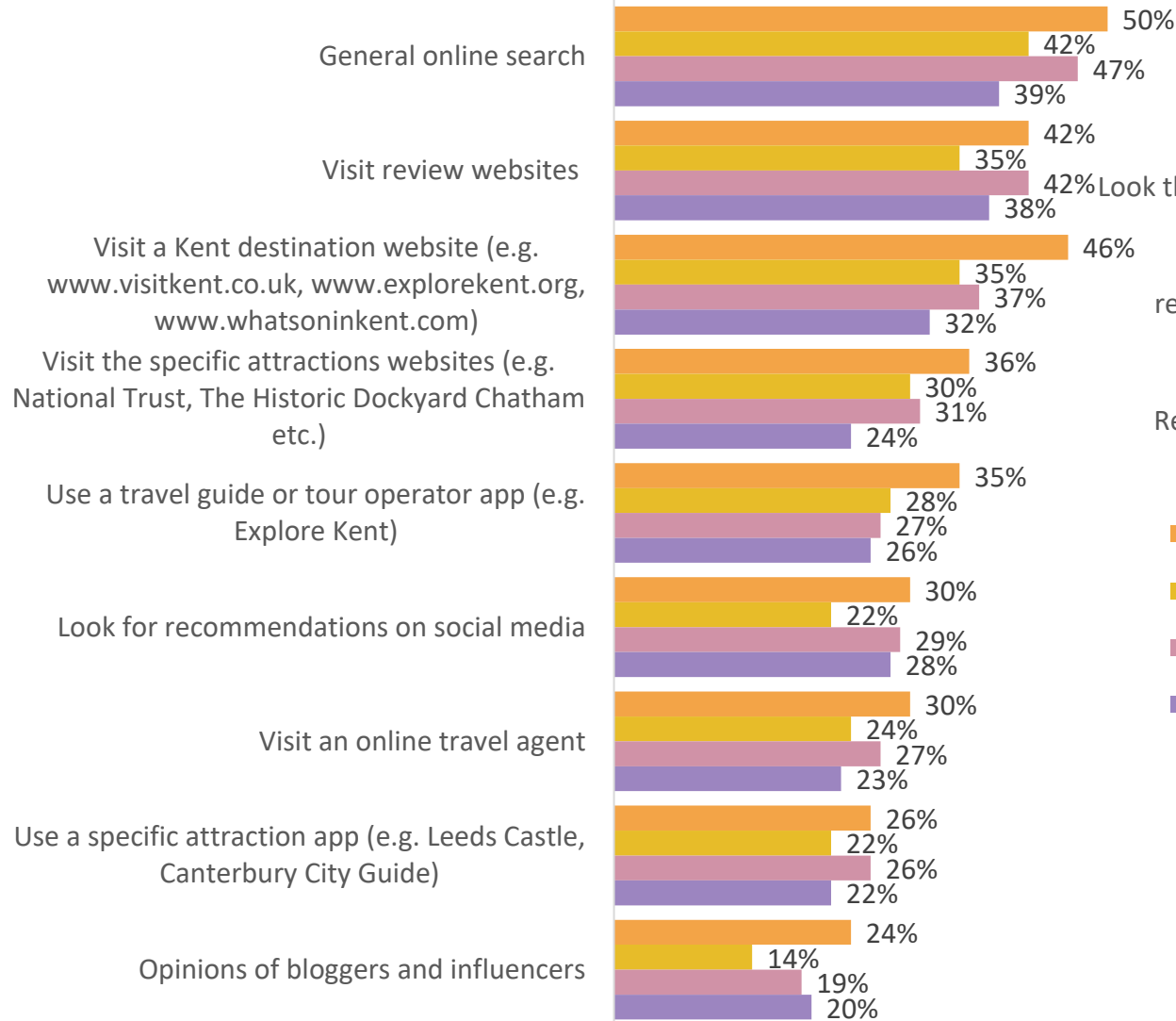
Sources of Information - by age

Older people tend to do more research, particularly through offline channels. As might be expected, younger travellers make more use of social media and bloggers.

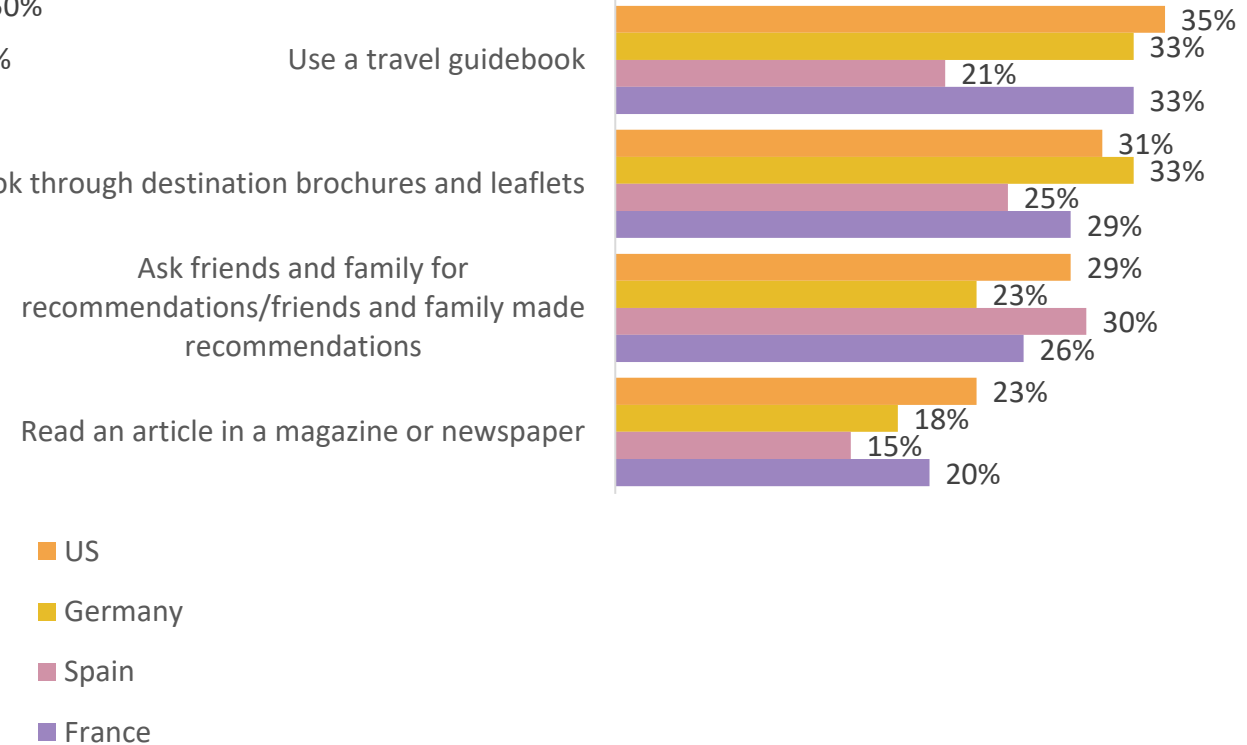


High consistency across countries.

Online Channels

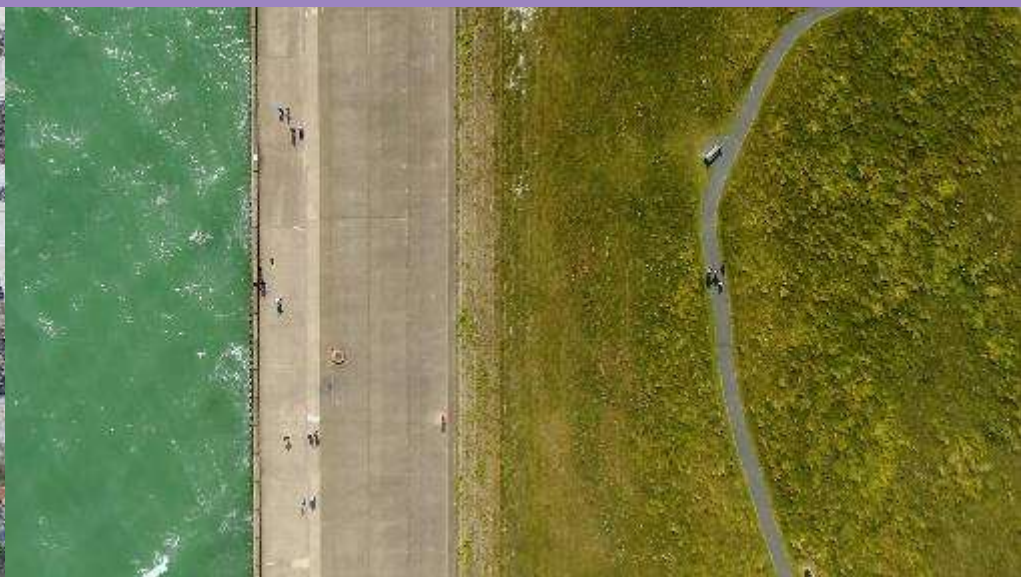


Offline Channels



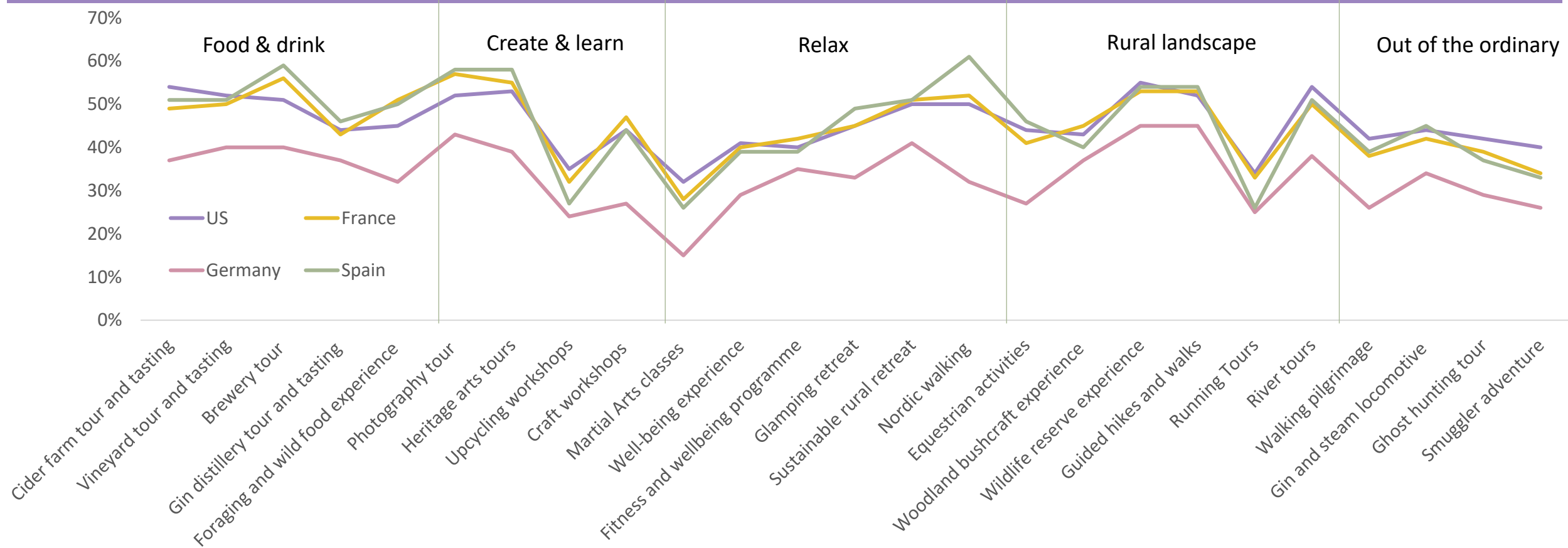


Immersive Experiences – Deep Dive



Immersive Experiences

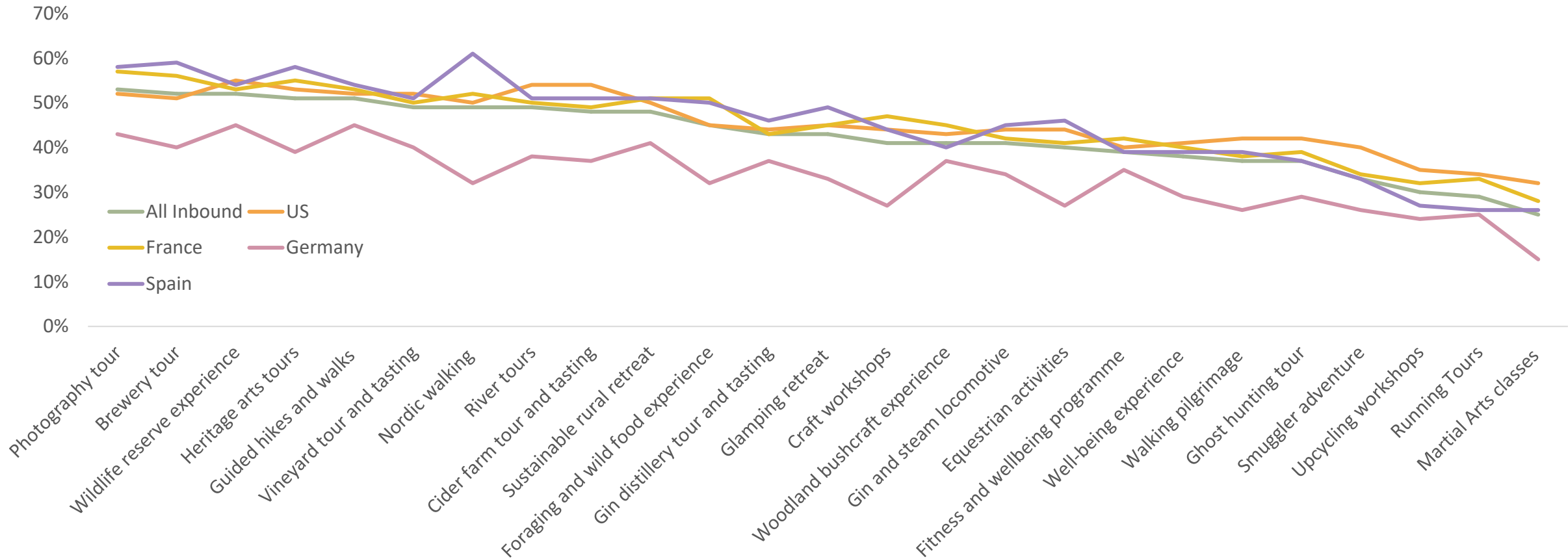
Food & Drink experiences are generally most popular with inbound audiences. Often the experiences of least interest are either those that are niche in their appeal or ones that are perhaps not so clearly understood.



Q57/58/59 Would you consider doing any of theseexperiencesin the future whilst on a holiday or short break in Kent?
 Will definitely visit / consider visiting Kent in the future (1,989) US (750), Germany (671), Spain (750), France (748)

Immersive Experiences

Germans show less interest in experiences generally, otherwise the countries are quite consistent in the types of experiences that appeal most. Nordic Walking is of particular interest to the Spanish.

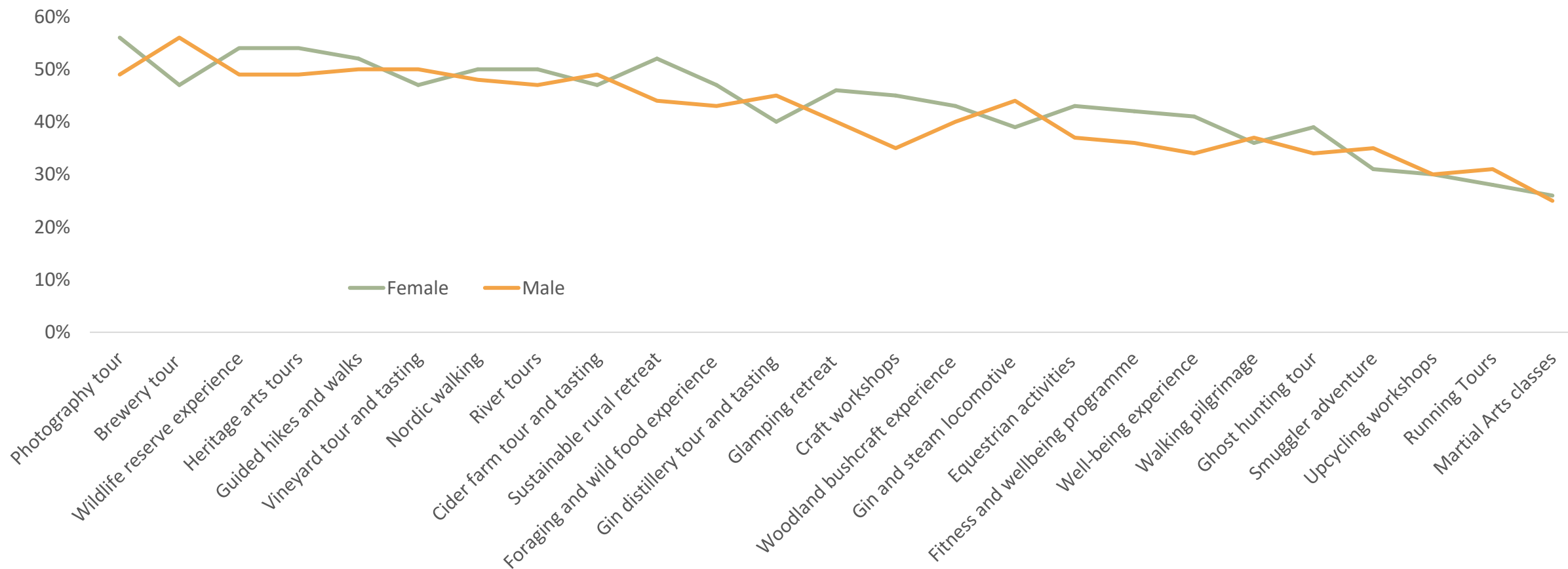


Q57/58/59 Would you consider doing any of theseexperiencesin the future whilst on a holiday or short break in Kent?

Base: All (2,919), US (750), Germany (671), Spain (750), France (748)

Immersive Experiences

Interest levels between men and women are quite similar, with brewery tours and the two gin experiences are higher among men.

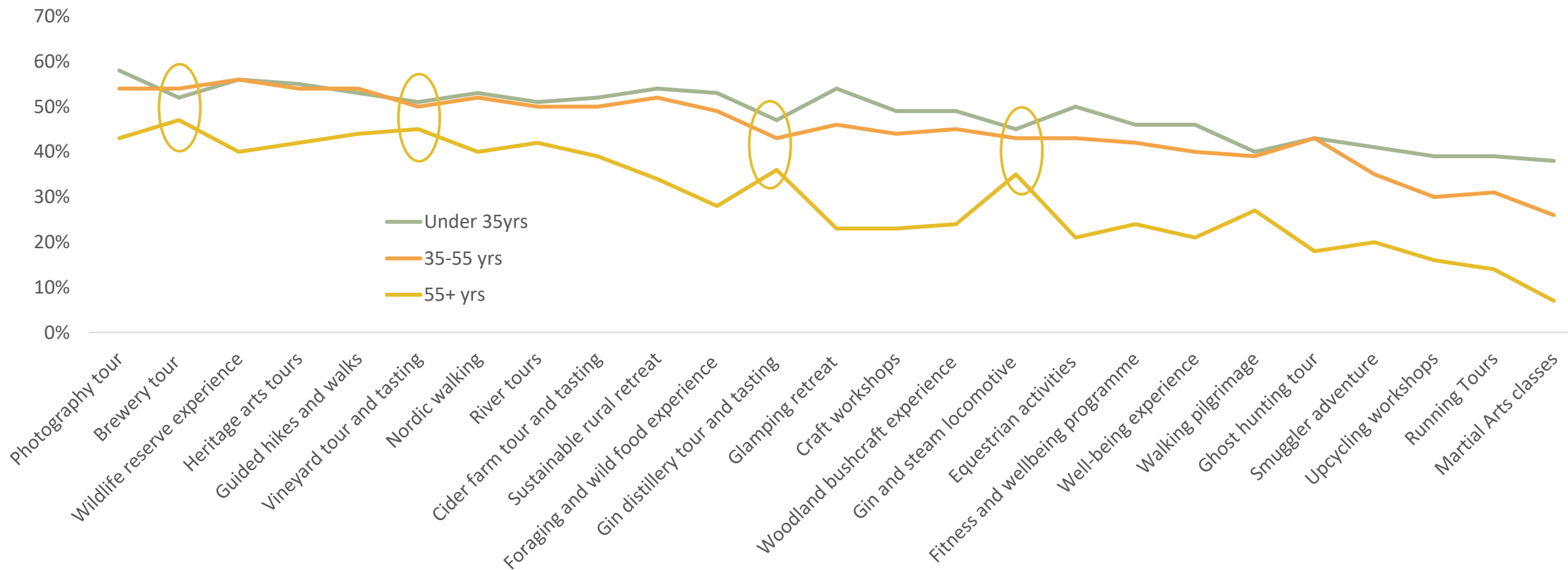


Q57/58/59 Would you consider doing any of theseexperiencesin the future whilst on a holiday or short break in Kent?

Base: All (2,919)

Immersive Experiences

Older people are less interested in experiences generally, though their interest levels are closer for the brewery and vineyard tours and the two gin experiences.

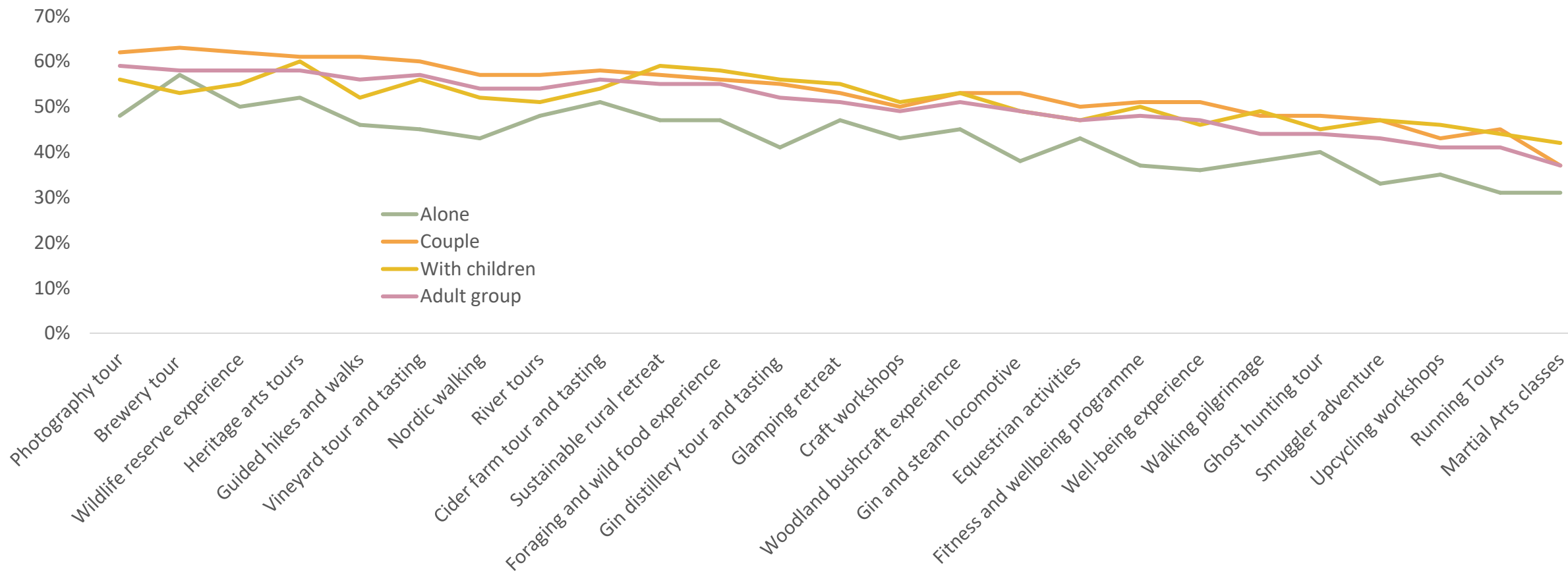


Q57/58/59 Would you consider doing any of theseexperiencesin the future whilst on a holiday or short break in Kent?

Base: All (2,919)

Immersive Experiences

Those travelling alone are less interested in experiences.

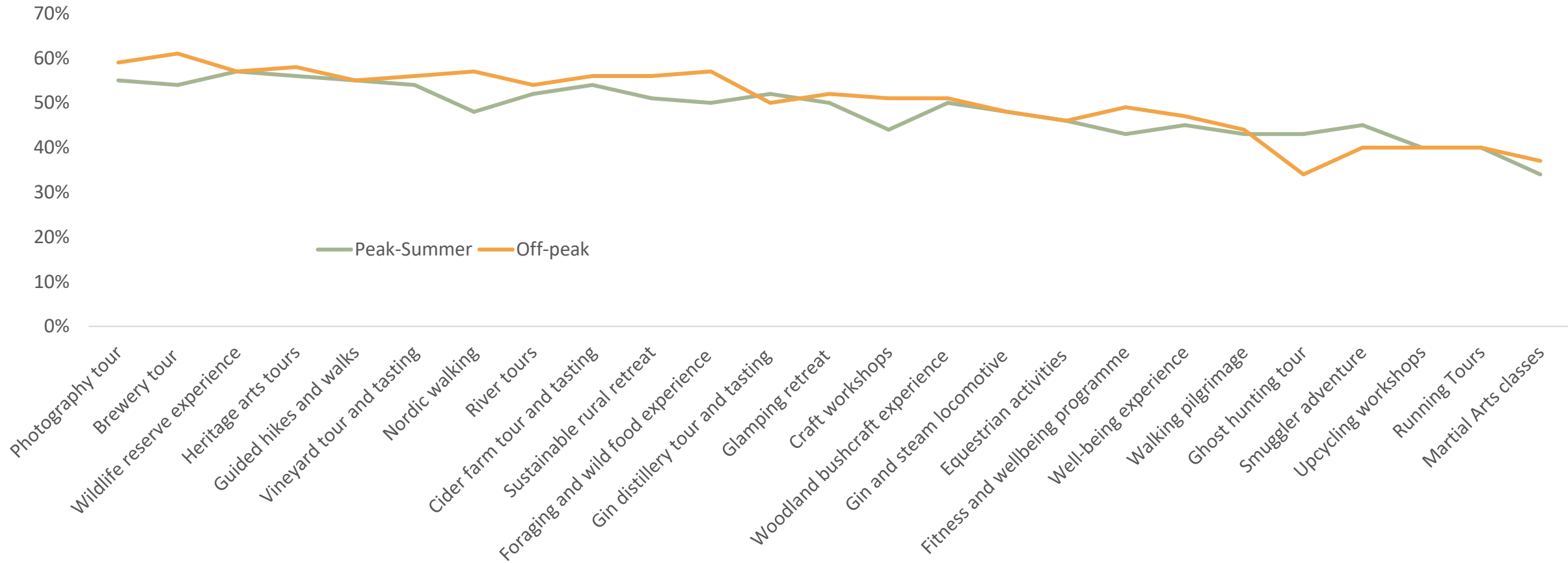


Q57/58/59 Would you consider doing any of theseexperiencesin the future whilst on a holiday or short break in Kent?

Base: All (2,919)

Immersive Experiences

Most experiences have the same or higher interest levels among off-peak travellers.

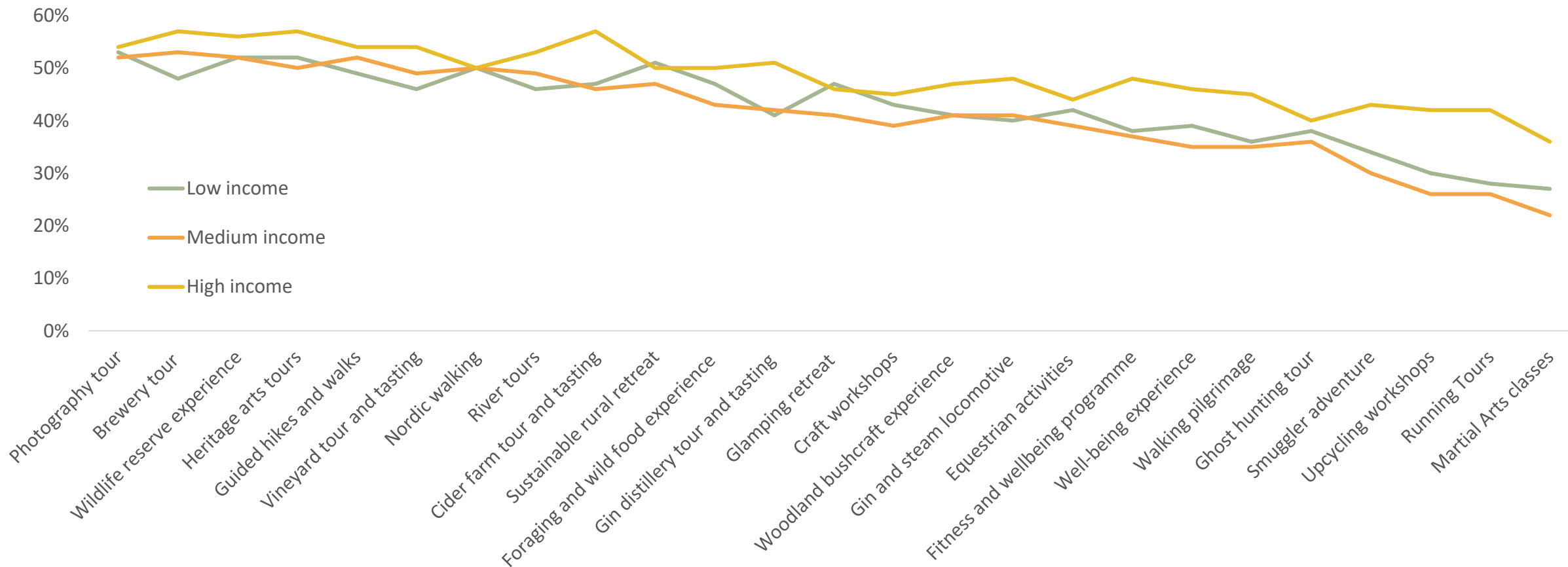


Q57/58/59 Would you consider doing any of theseexperiencesin the future whilst on a holiday or short break in Kent?

Base: All (2,919)

Immersive Experiences

Those from higher income households have greater interest in many of the more niche experiences.

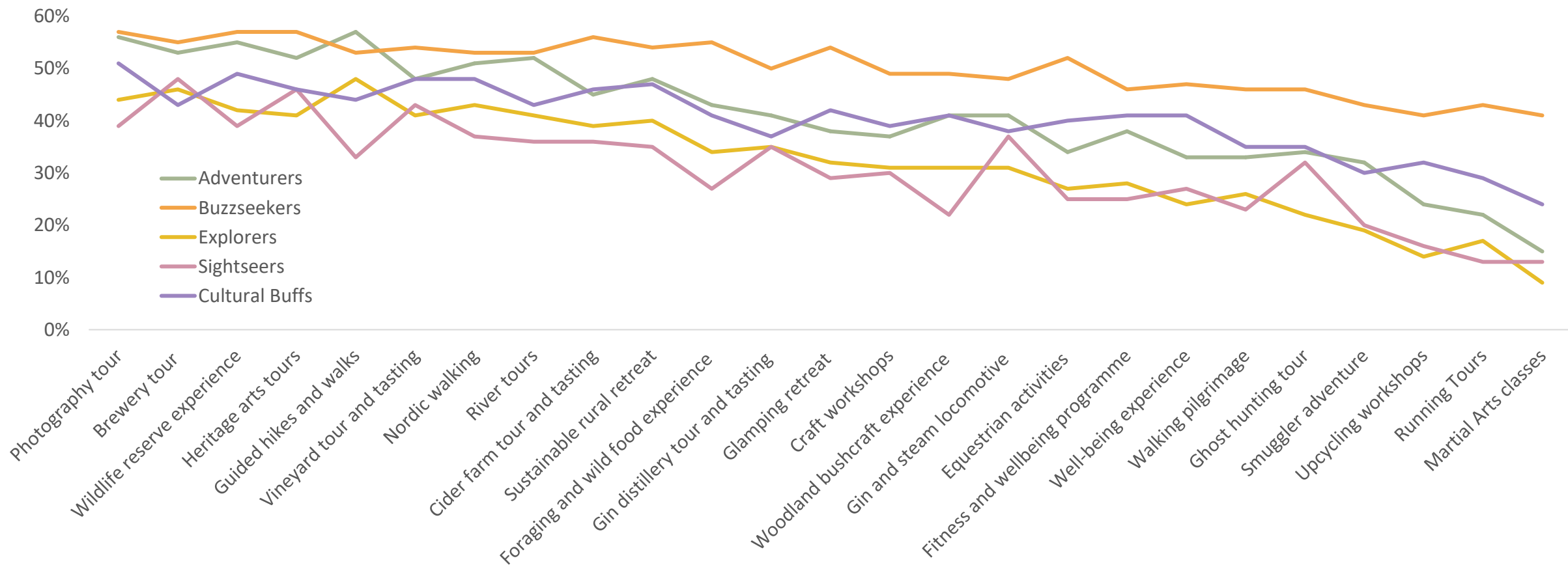


Q57/58/59 Would you consider doing any of theseexperiencesin the future whilst on a holiday or short break in Kent?

Base: All (2,919)

Immersive Experiences

Buzzseekers typically have the highest interest in experiences and Sightseers the least.



Q57/58/59 Would you consider doing any of theseexperiencesin the future whilst on a holiday or short break in Kent?

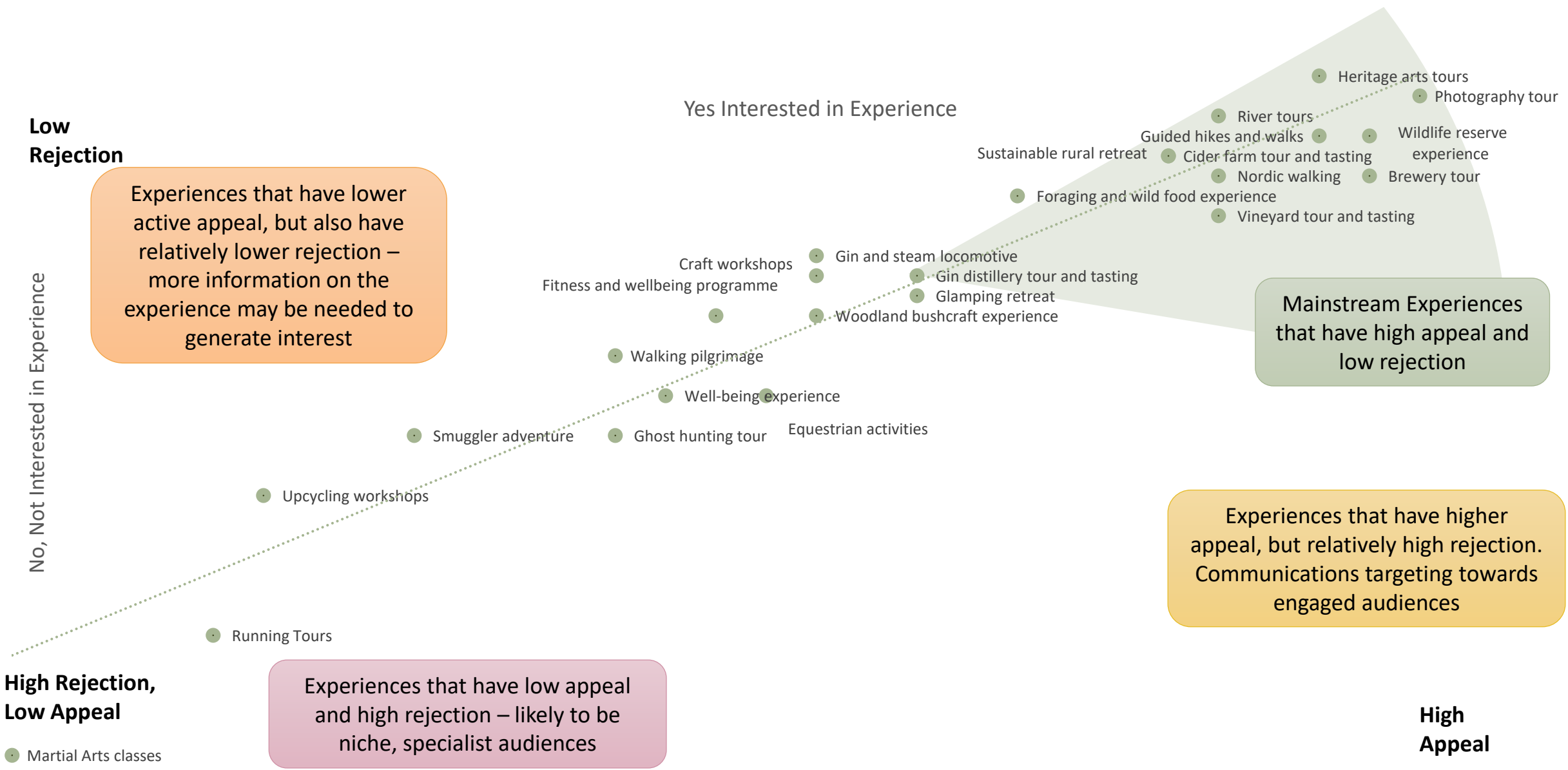
Base: All (2,919)

Adventurers and Explorers are more interested in the outdoor experiences.
 Buzzseekers have diverse interests, reflecting their greater level of activity.
 Sightseers tend to favour tour-based experiences.

Culture Buffs are more interested than other segments in Nordic Walking and the Sustainable rural retreat.

Rank	Adventurers	Buzzseekers	Explorers	Sightseers	Culture Buffs
1	Guided hikes and walks	Photography tour	Guided hikes and walks	Brewery tour	Photography tour
2	Photography tour	Wildlife reserve experience	Brewery tour	Heritage arts tours	Wildlife reserve experience
3	Wildlife reserve experience	Heritage arts tours	Photography tour	Vineyard tour and tasting	Vineyard tour and tasting
4	Brewery tour	Cider farm tour & tasting	Nordic walking	Photography tour	Nordic walking
5	Heritage arts tours	Brewery tour	Wildlife reserve experience	Wildlife reserve experience	Sustainable rural retreat
6	River tours	Foraging and wild food experience	Heritage arts tours	Nordic walking	Heritage arts tours
7	Nordic walking	Vineyard tour and tasting	Vineyard tour and tasting	Gin and steam locomotive	Cider farm tour and tasting
8	Vineyard tour and tasting	Sustainable rural retreat	River tours	River tours	Guided hikes and walks
9	Sustainable rural retreat	Glamping retreat	Sustainable rural retreat	Cider farm tour and tasting	Brewery tour
10	Cider farm tour and tasting	Guided hikes and walks	Cider farm tour and tasting	Sustainable rural retreat	River tours

Immersive Experiences



Q57/58/59 Would you consider doing any of theseexperiencesin the future whilst on a holiday or short break in Kent?
Base: All (2,919)



Kent Perception Research

International
February 2022

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