


Kent Perceptions Research - Executive Summary

Domestic & Inbound

March 2022

European Regional Development Fund
EUROPEAN UNION
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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.

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).

In addition to this executive summary, there are detailed reports on the domestic market and on key international markets, as well as individual country summaries.

The research topics covered include:

- Past and potential future visitor profiles (demographics, group composition)
- Visit experience among those who have visited Kent before
- Opinions, expectations, and perceptions of Kent
- Appeal of activities and experiences
- Benchmarking against several competitor areas of England
- Travel behaviours (transport, accommodation, visit duration)

The Research Programme

Online survey among people who have visited Kent previously and/or will visit in future

Country	Interviews	Timing
Britain	2001	August
US	750	December 2021
France	748	
Spain	750	
Germany	671	

In addition, 10 in- depth interviews in England

Covid lock-down in GB had been largely lifted, though some restrictions around masks, social distancing etc. were still in place. Internationally, some travel restrictions, testing and quarantine rules were still in place at the time of the research.

Context

- **Sustainability** is an increasingly important topic in all aspects of life, including holiday habits, though the tendency is for it to be 'quite' rather than 'very' important in holiday choices. At the moment, the sustainability focus for travellers tends to be on things that have a personal benefit, such as clean beaches and actions to protect the natural landscape.

- With **Covid** recovery only just beginning while the research was taking place, there were still concerns around travelling, with over 40% of people making short-term changes to their holiday habits and taking more leisure trips in their own country. This suggests at least in the short term, the opportunity remains strong for bookings from the domestic market, while building consideration across international markets in readiness for the return to international travel that is already beginning.

- **Brexit** is a concern for travellers, with port and airport difficulties a worry for over half of potential inbound visitors. As would be expected the concern is greater among the European markets than the US.

Familiarity

- Knowledge of Kent is quite limited, with only half of the domestic audience saying that they know the county extremely or very well. However, this level of familiarity for Kent is higher than seen for Norfolk, Lincolnshire, and Hampshire. Devon has a higher level of familiarity among domestic travellers but is similar to other counties for inbound visitors.

- People in the US are most familiar with Kent and those in Germany and Spain the least so.

- Coupled with the generally positive perceptions, this provides opportunity to continue to build familiarity with the county.

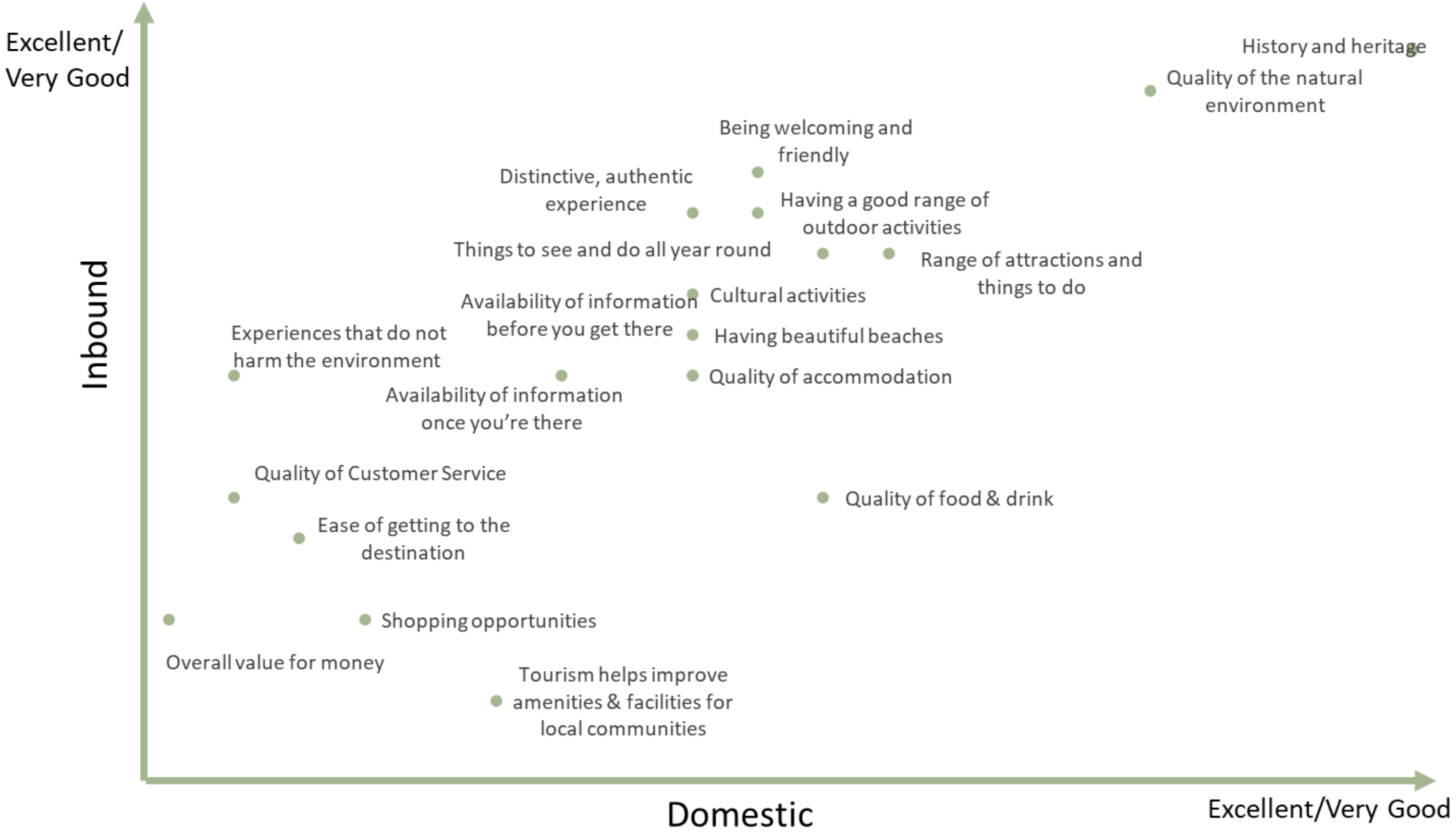
- At destination level, Dover, Canterbury, Margate, and Folkestone are the most visited and well-known domestically. Internationally the clusters of 'Canterbury, Whitstable, Herne Bay' and 'Deal, Dover, Sandwich' are the most visited and well-known. Raising awareness of more places within Kent provides further opportunity to demonstrate the extent of the region's offer.

Experience

- Among those who have visited Kent before, overall experience is mixed. It is most positive among older people and those who have stayed longer in the area or visited as a couple. Most recent visitors are more positive than those visiting longer ago.

- Visitors from the US rate Kent higher than those from Europe, though this may be reflective of cultural differences.

- The core strengths of Kent; history & heritage and the natural environment, are consistent across both domestic and inbound and are broad foundations for a wide range of visitor experiences and visit types. There are opportunities to build reputation in a number of areas - value for money, shopping experience and quality of customer service.



Inspiration to Visit

- ‘Active and Outdoors’ imagery appeals most to both domestic and inbound travellers, reflecting the strength of the landscape in Kent’s reputation.

- For domestic visitors ‘Food and Drink’ imagery is appealing.

- It is important to note that for inbound visitors the ‘Exciting and Unexpected’ imagery is the second most popular, illustrating the importance of energy and vitality in the messaging to prospective visitors.

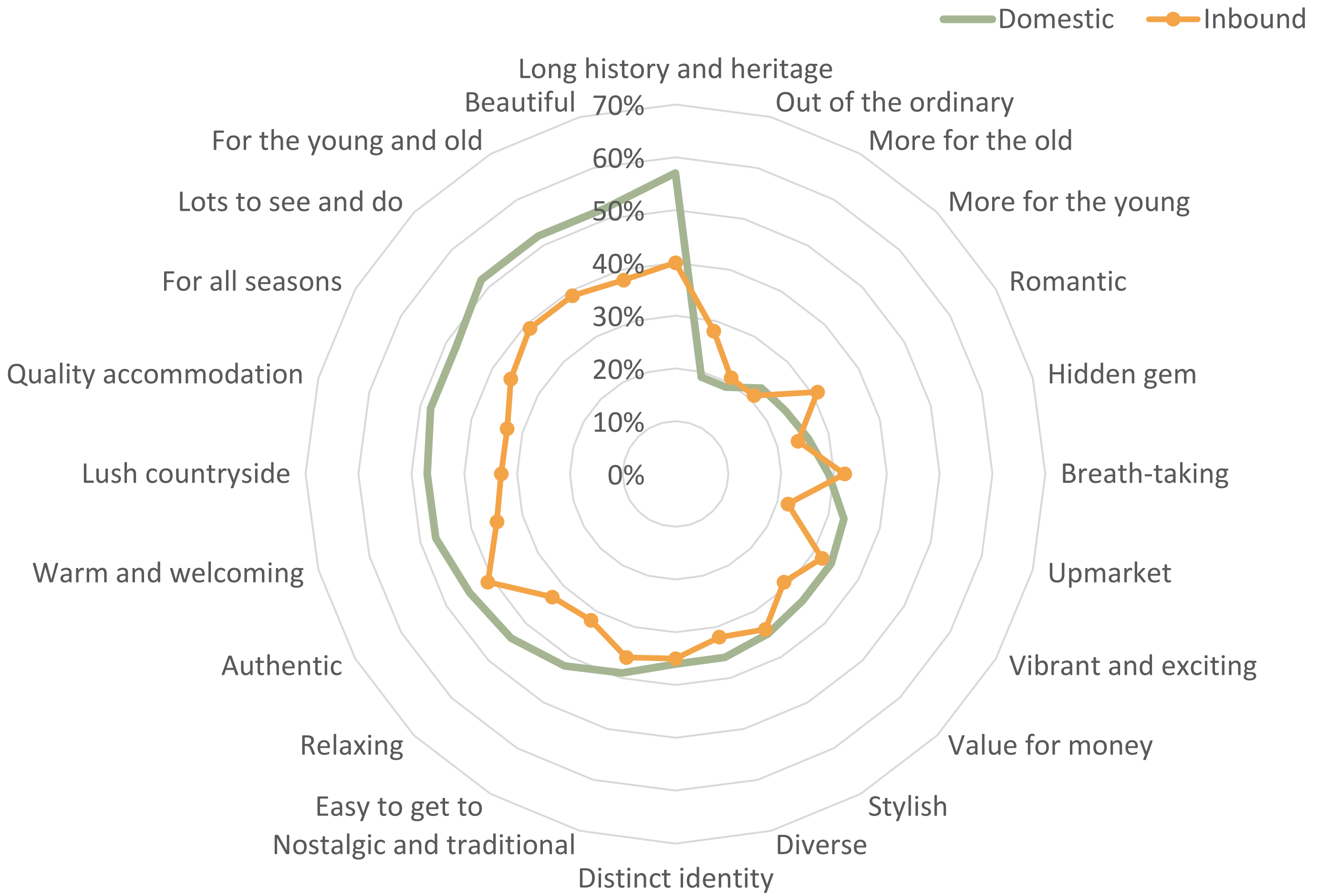
- While all countries are most likely to be inspired by ‘Active and Outdoors’, there some differences for the other imagery tested:
    - Spanish travellers are also inspired by the ‘History and Heritage’ images, suggesting an additional opportunity to attract visitors from Spain
    - People in Germany are the least likely to be drawn by ‘Wellbeing’ imagery
    - ‘Exciting and Unexpected’ images are appealing to both French and American travellers

Perceptions of Kent

- Perceptions of Kent are positive with spontaneous associations for the domestic audience, centring on the outdoor strengths of the area, both countryside and beaches. ‘Garden of England’ is also spontaneously mentioned along with historic destinations.

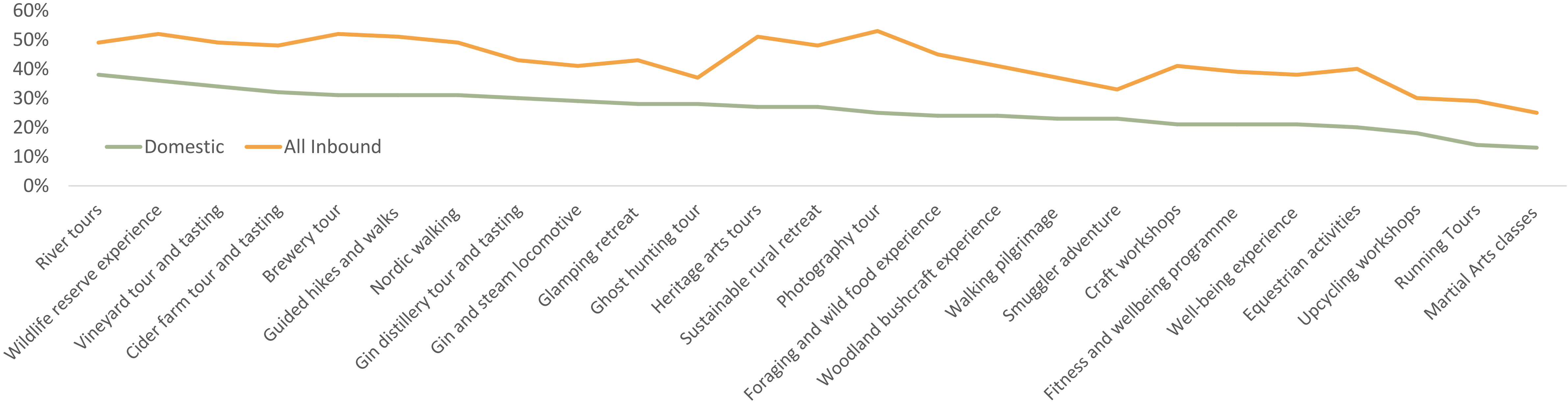
- Internationally, perceptions are similar with spontaneous mentions typically referencing the beauty, landscape, and history. These are strong foundations, that are consistent with perceptions of regional England more widely, from which the unique offer of Kent can continue to be developed and communicated.

- When prompted, associations with Kent continue to focus on the heritage and the beauty. For the domestic audience particularly, Kent is seen as somewhere that has lots for everyone all year round. Again, a strong baseline from which the area’s unique offer can be promoted.



Immersive Experiences

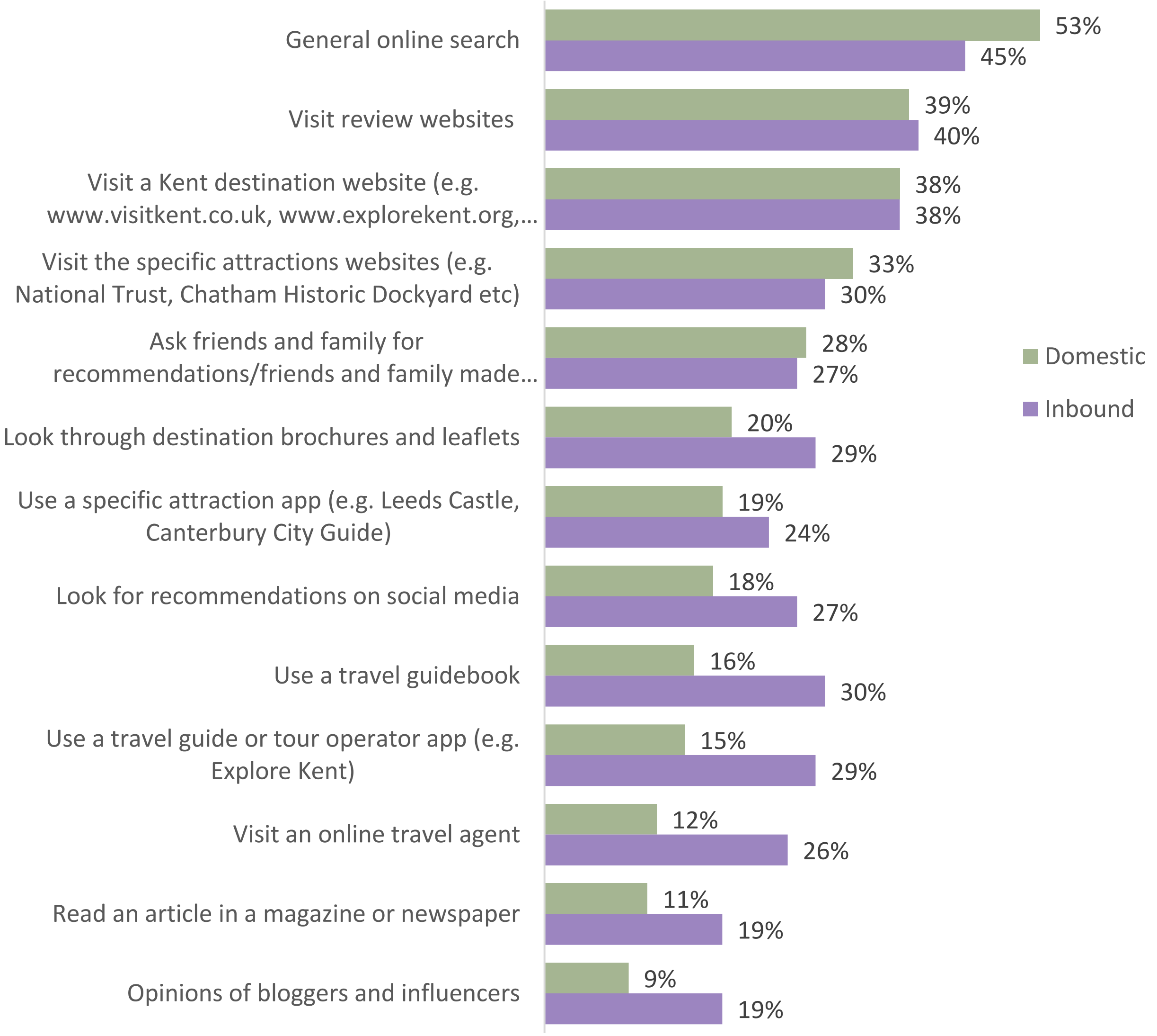
- The appeal of 31 immersive experiences was tested. Previous VisitBritain research found that experiences that are unique and authentic can drive holiday choice and experiences can play a part in extending the visit duration.
- Most popular experiences are typically well-known, recognised activities:
  - Rural Landscape Experiences – River tours and Wildlife reserve experiences
  - Food & Drink Experiences – Vineyard, Cidery and Brewery tours
- For the inbound audience particularly, the experiences that most appeal are those that are authentic to Kent and provide opportunity to explore and experience the area.
- Experiences are generally of most interest to younger people (under 55's) and to Buzzseekers. Outdoor experiences appeal more to Adventurers and Sightseers.



Q57/58/59 Would you consider doing any of these ….experiences …..in the future whilst on a holiday or short break in Kent?
Base: All domestic (2,001) all inbound (2,919)

Planning and Booking

- The lower level of knowledge of Kent, and perhaps England also, is reflected in the broader level of research carried out by inbound visitors when planning a visit.
- Consistently, online channels are the most used with general search and the use of review sites at the top of the list. Over a third of all potential visitors will use a Kent destination website or specific attractions websites, illustrating the importance of these websites as a means of enticing visitors.
- Despite the dominance of online channels, the value of leaflets and brochures is evident, particularly for inbound travellers, 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.
- A mix of **booking channels** is important to maintain, as 48% of inbound visitors book with a package provider and 40% book directly with accommodation providers and attractions. This mix is very similar across all inbound markets included in the research.



Seasonality

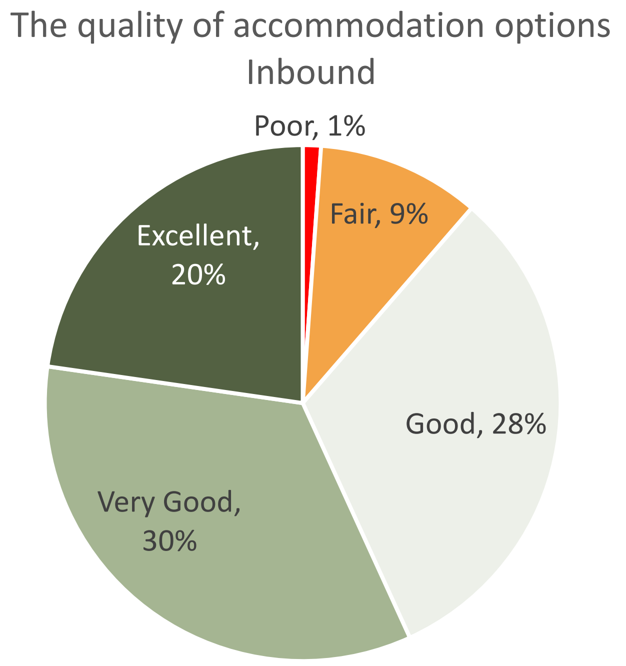
- There is considerable overlap between peak and off-peak visitors, with people willing to consider visiting across the seasons, though there is, as would be expected, a summer skew. For those with children, school holidays dictate timing. For those travelling without children, there is a tendency to avoid the school holidays.
- Therefore, off-peak visitors tend to be older (55yrs+) and be Adventurers, Explorers and Sightseers.
- Motivations to visit off-peak are typically driven by better prices and less people around. Specific events and experiences have potential to drive more off-peak visits. It is notable that several of the outdoor experiences hold greater appeal among off-peak inbound visitors including foraging, rural retreat, and Nordic walking. Other experiences that are more popular among off-peak visitors are the photography tour, brewery tour, and the fitness & wellbeing programme.

Transport

- There is considerable overlap between peak and off-peak visitors, with people willing to consider visiting across the seasons, though there Private car is the main mode of transport for getting around Kent for almost two-thirds of domestic and a third of inbound visitors. Whilst not the most sustainable transport mode, the high car usage does make multi-destination visits and access to various immersive experiences easier.
- Among inbound travellers, 10% would be interested in coach tours. There is a tendency for this to be higher among first time visitors, the over 55's and the Sightseer segment. They are also popular among those who would visit on a day trip, perhaps as part of a wider tour of England.
- Visitors from the US are the most likely to make use of taxis (15%), while a similar proportion of visitors from Europe would use buses. Ensuring public and private transport options are clearly communicated is important for enabling all visitors, but particularly those travelling inbound, to expand their visit to Kent, both geographically and potentially in duration too.

Accommodation

- Accommodation is a very important part of the holiday and therefore an important element of the overall tourism proposition for Kent.
    - It is often a key part of the decision-making process around holiday destination and for 17% of domestic travellers it is main reason for the holiday, and for a further 47%, accommodation has significant influence over the holiday choice
    - Among inbound travellers, 90% say the accommodation (type, quality) is important to them when choosing a destination
- 1 in 5 inbound visitors believe the accommodation options to be 'excellent' in Kent, though an opportunity remains to further increase the expectations and experiences of accommodation in Kent.
- The most popular type of accommodation for both domestic and inbound visits is mid-range hotels.
    - Inbound visitors are more likely to opt for high-end hotels, or budget hotels if on limited income
    - C.10% of domestic visitors opt for B&B/guesthouses and the VFR market is also important (though not good for the paid-for accommodation sector)
    - There is a rise in interest among both domestic and inbound travellers for rented accommodation (cottages, Airbnb etc.), a trend that appears to be accelerated by Covid and the desire to be in 'your own space' and not sharing facilities with others.



Segmentation

- VisitBritain segmentation was included to provide insight into visitors based on the attitudes and behaviours. Buzzseekers are the largest segment of prospective visitors to Kent, followed by Adventurers in the domestic market and Explorers internationally (particularly from Germany).

Segment	Global Size Estimate*	Domestic Audience for Kent	Inbound Audience for Kent				Profile Headlines
			US	Germany	Spain	France	
Adventurers	16%	24%	13%	17%	12%	17%	Older, 67% aged 45 years+ Enjoy travelling off the beaten track Like spending time outdoors in nature Seek out new experiences
Buzzseekers	38%	27%	46%	30%	41%	44%	Younger, 64% aged 18 – 34yrs Free spirited and spontaneous They like to take action & excitement trips
Explorers	23%	29%	24%	37%	27%	22%	Older, 58% aged 55 years+ Content at a more relaxed pace Nature lovers enjoy the outdoors as well as must-see sites Enjoy embracing local culture
Sightseers	12%	10%	7%	7%	12%	7%	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%	10%	10%	9%	8%	10%	Average age 37 years Image and brand conscious Travelling is often a status symbol Like well-known and safe destinations

* Source: Inbound Tourism Toolkit | VisitBritain/VisitEngland

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XV Insight

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