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EXPERIENCE
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Interreg EXPERIENCE- Social Impact Monitoring: Kent Residents Survey

WAVE 4 - Winter 21/22

VISIT KENT BUSINESS GARDEN of ENGLAND

Kent Downs
Area of Outstanding Natural Beauty

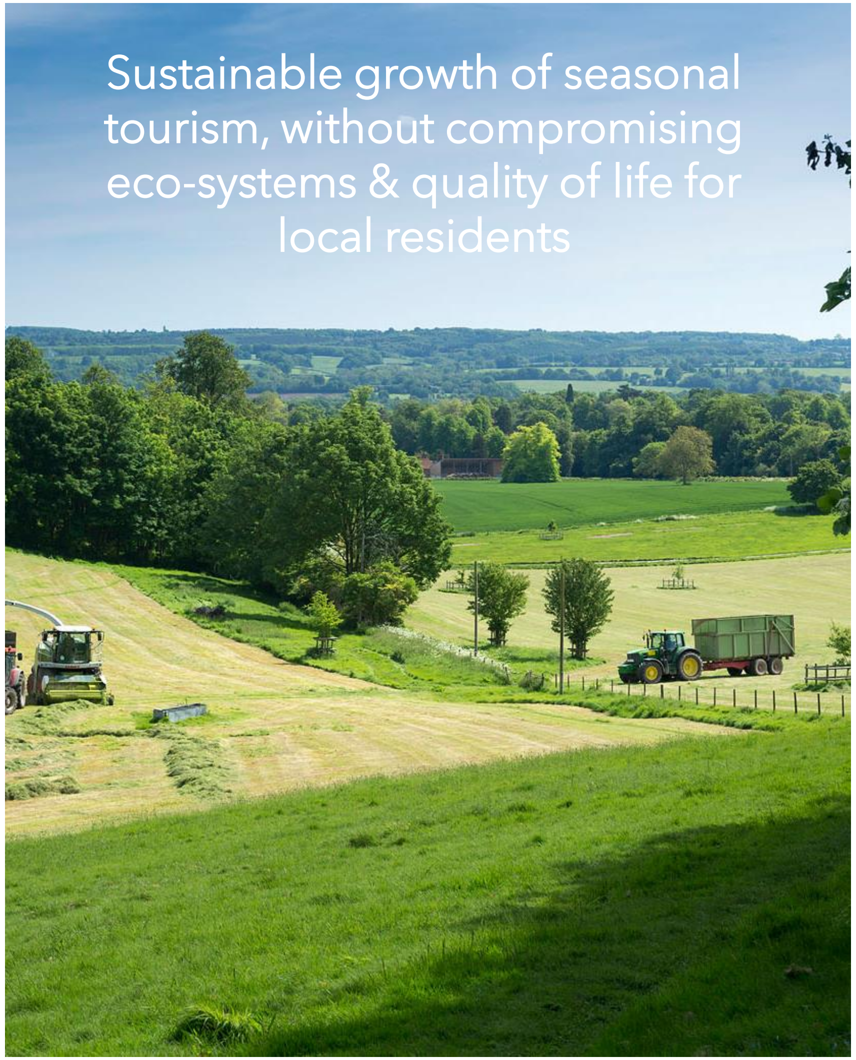
Contents

Introduction and Report Overview

This report covers findings from a recent survey sent out to Kent residents, to gather valuable insights into their perceptions of seasonal tourism, as well as the impact of the COVID-19 pandemic on local communities. This survey is the fourth wave in a series of surveys that are being completed and it is based on winter tourism in 2021/2022, with the previous wave having been conducted last year, based on summer tourism in 2021. Previous reports can be found here.

This activity is part of the Interreg EXPERIENCE project, an exciting €23.3 million European-funded project, centred on the development of off-season bookable experiences, with a focus on overnight stays, to extend the tourism season. This concept is supported by the growing demand for experiential tourism, and subsequently presents an opportunity for businesses and destinations to not only increase visitation in the shoulder months, but to also strengthen the resilience of the sector post-COVID. The principle of sustainable tourism is also a topic that is embedded in the project's approach, as it seeks to ensure sustainable growth of seasonal tourism without compromising eco-systems and quality of life for local residents. The contribution that the project will bring to Kent is vital, aiming to stimulate economic, social and environmental benefits to communities and the wider destination. Moreover, the revenue generated will be used to help protect and maintain historical and cultural attractions, that are integral to the county's tourism landscape, product offering, and sense of place.

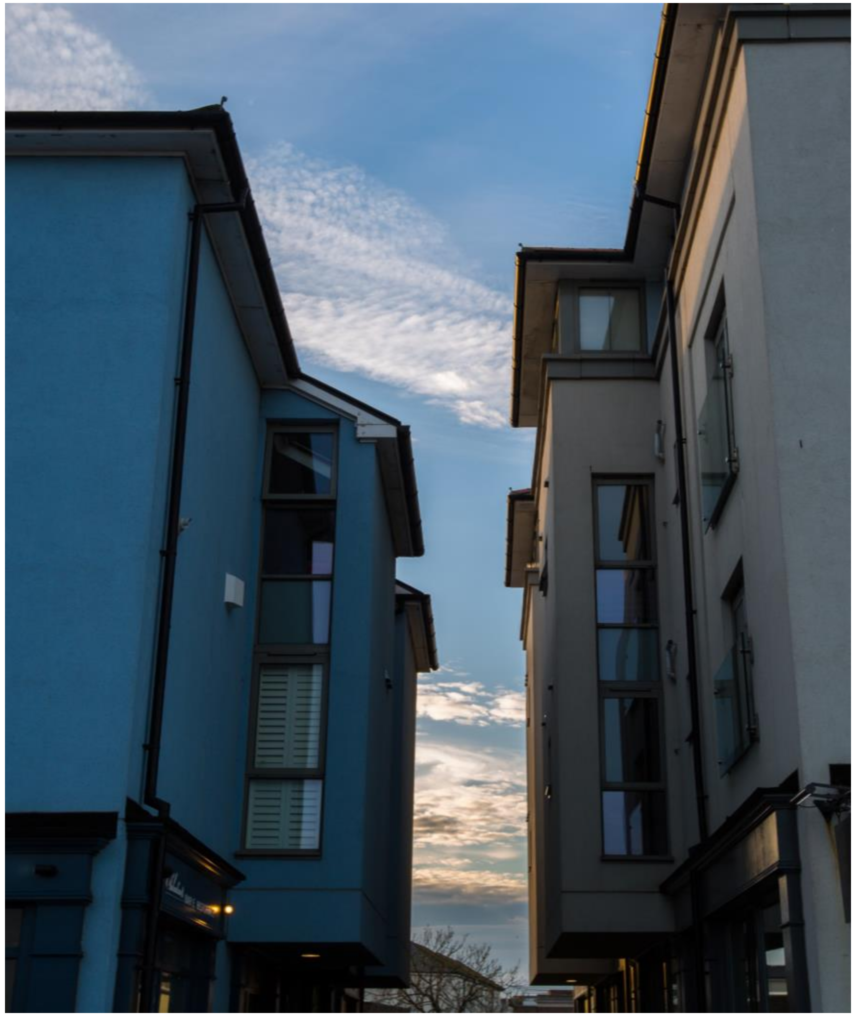
The support of residents and local communities is fundamental to successful tourism development and continuity, and can have a considerable impact socially, economically and on general wellbeing. Therefore, by monitoring these impacts over a series of surveys across the lifetime of the project, any changes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



This report is based on findings emerging from the fourth wave of data collection, integrating perceptions around the impacts of winter tourism, with the central aim to identify key areas that differ from the sentiment expressed in previous waves of the survey. By doing this, key trends and parallels will be outlined to create a picture of how seasonal changes in tourism activity can impact residents' views towards the sector, highlighting the benefits and challenges it can bring to local communities.

Findings will also be segmented by variables such as respondent demographics, district of residency and those situated within the Kent Downs AONB, where sample sizes allow. In doing so, any findings that differ from the overall county results can be highlighted, to add further depth to interpretation and recommendations. The report will include the following sections listed below, followed by some key takeaways and recommendations, which will be compiled to help inform wider project aims and objectives, alongside future waves of the survey.

- Perceived impacts and benefits of winter tourism
- Impact on wellbeing and emotional connection to local area
- Changes to visitor footfall and local engagement with attractions and facilities
- Resident working patterns and engagement with facilities
- Resident travel behaviour and perceptions of local area for leisure
- Top positive and negative impacts of tourism and overall support



Please note, that the report published following the first wave of the residents' survey aimed to act as a benchmarking tool for future waves, and covered results for all questions, to help create a picture of residents' then current perceptions and support of tourism. Subsequently, as previously highlighted, further reports will focus on outlining key differences and trends. However, in each respective section, questions that did not meaningfully fluctuate will be acknowledged.

Given the unprecedented impact of COVID-19, previous waves aimed to outline and monitor the implications of the pandemic. Furthermore, insights gained were key in helping to track any changes in perceived benefits and risks associated with tourism, at different times of the year. To achieve this, previous waves segmented questions into a pre and post COVID context, however, as we emerge from the pandemic, this wave's survey was adapted to bring questions back into the present context, based on residents' current perceptions and support of tourism in their local area.

When adapting the survey, additional questions were also added (see green box), to gain a more in-depth understanding into resident travel intentions & behaviour. This will enable tourism organisations to target marketing activity to the hyper-local segment more accurately, in line with their leisure preferences and behaviour.

- If residents have had friends or relatives staying over in the last 6 months prior to data collection.
- Where residents would take/recommend friends and family to visit in their local area
- General travel intentions & changes to behaviour following the pandemic
- Sources of information used when planning a local leisure trip
- Working patterns (e.g. working in a hybrid way following the pandemic) & engagement with local eateries & outdoor spaces when working from home

Please note, when comparing findings with previous waves, it will be imperative that these are understood within the context of their own time.

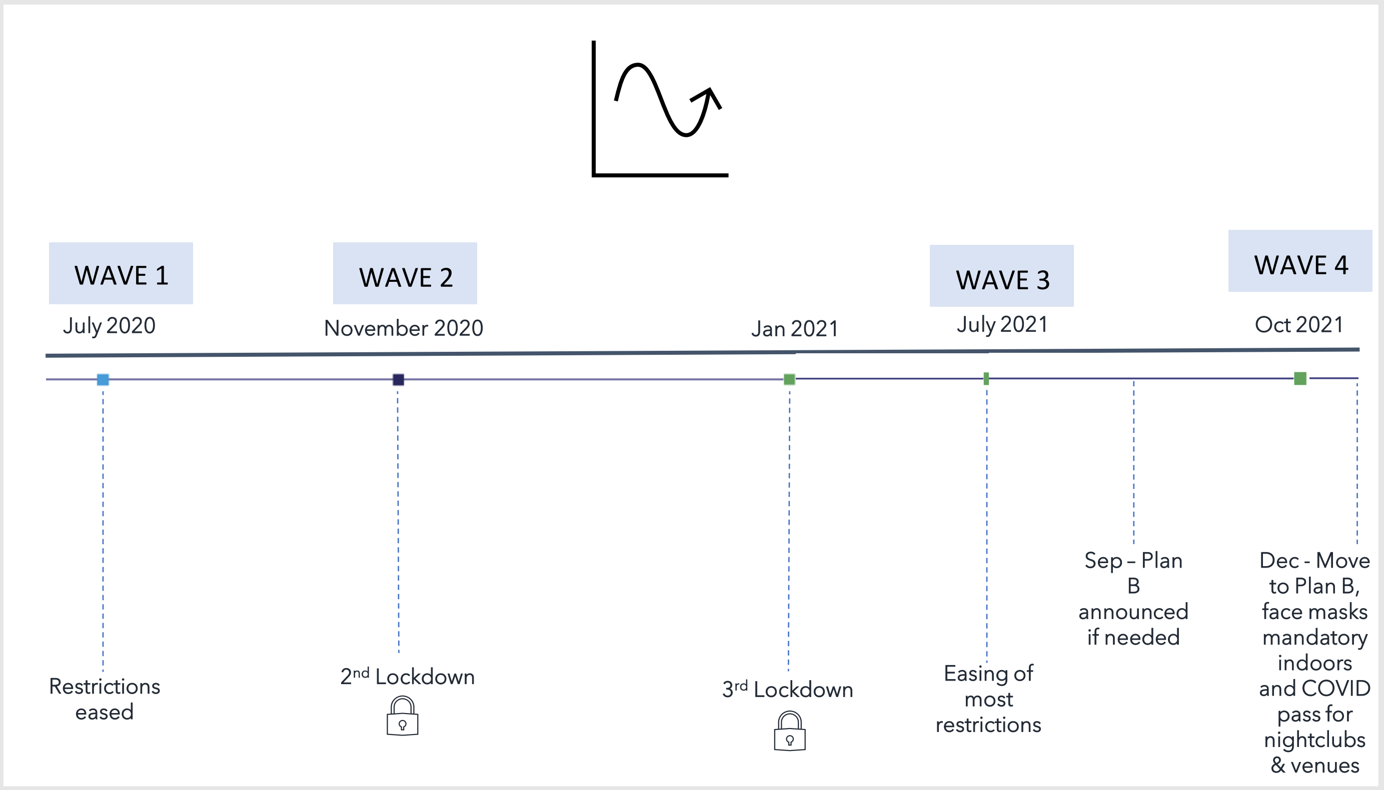


Diagram showing a timeline of data collection for each wave alongside COVID-19 restrictions

This includes the impact of varying COVID-19 restrictions and resident activity and engagement, with some results being significantly altered due to restrictions imposed at the time. The timeline presented above aims to act as a visual for these periods, however each individual report ensures findings are presented in the context of circumstances at the time of data collection.

Kent Residents Survey - Wave 4

KEY FINDINGS

This survey looked to present findings from the fourth wave of the survey, which aimed to gather valuable insights into the perceptions of Kent residents on the impacts of seasonal tourism.

72% Consider their local area to be a tourist destination

85% Agreed with the statement 'I support winter tourism in my local area'

Perceived Main Attraction

Coast/Beaches	Museums/Historic sites	Countryside
35%	28%	21%

1,190 Kent Residents

Online Survey

Infrastructure

46% Agreed that local infrastructure is improving as a result of tourism

+26% vs. Wave 3

Damage to the Environment

54% Agreed that tourism can cause damage to the natural environment

-5% vs. Wave 3

83% Of residents agreed with the statement 'I live in a beautiful area'

Transport

+10% increase in agreement that local transport services are improving vs. wave 3

36% have always travelled to work

30% have adopted hybrid working

89% Of residents agreed that 'overall, I am happy with my lifestyle'

54% will take more day trips in Kent in 2022

34% had friends and relatives to stay in the last 6 months

When working from home...

43% use more local cafes and shops

69% access more outdoor green spaces

Methodology

Data Collection

01

Wave 1 - Summer 2020

Wave 1 of the survey was sent out to Kent residents in autumn 2020, to gain an insight into perceptions of summer 2020 tourism on local communities.

02

Wave 2 - Winter 20/21

Wave 2 of the survey was sent to local residents in February 2021, around the perceived impact of winter tourism.

03

Wave 3 - Summer 2021

Wave 3 of the survey was sent out to residents in September 2021, around the perceived impact of summer tourism.

04

Wave 4 - Winter 21/22

Wave 4 of the survey was sent to residents in March 2022, around the perceived impact of winter tourism.

Methodology

Data was collected through an online survey aimed at Kent residents via Visit Kent's and partners' resident databases and shared via promoted post on social channels. The survey was also incentivised and gave respondents an opportunity to be entered into a prize draw.

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

The survey itself was scripted and hosted by the University of Surrey, who are also partners in the project and following data collection, data was shared with Visit Kent to be analysed for the purpose of this report. Prior to analysis, any partial responses up to an agreed point in the survey were removed for consistency and accuracy purposes, which resulted in a total sample size of 1,190 respondents, a sample size that is consistent with previous waves. Furthermore, this provides a robust and comparative sample size. Please note, as not all questions in the survey were mandatory, sample sizes for certain questions may differ.

Online survey sent to Kent Residents

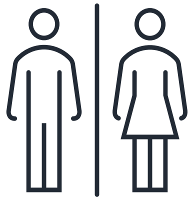
12 minutes to complete

1,190 Respondents

Sample & Demographics

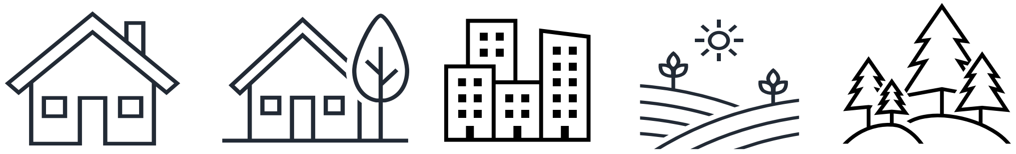
- To create a picture of the sample, respondents were asked various demographic questions. Findings show that the majority of residents were female, alongside residents aged 35-64 years.
- Residents most commonly stated they live in a town setting (48%), with 51% of residents having lived in their local area for over 25 years. Findings also show that the largest proportion are retired (37%), closely followed by 32% being employed full-time.
- Overall, demographics mirror the previous wave, however there was a -9% decrease in those aged 18-34 compared to wave 3, with an +8% increase in residents aged over 65. In line with this, an additional +9% were retired, with a subsequent decrease of -12% in residents working in full-time employment.

Gender (%)



31% 69%

Area of Residence (%)



Town 58%

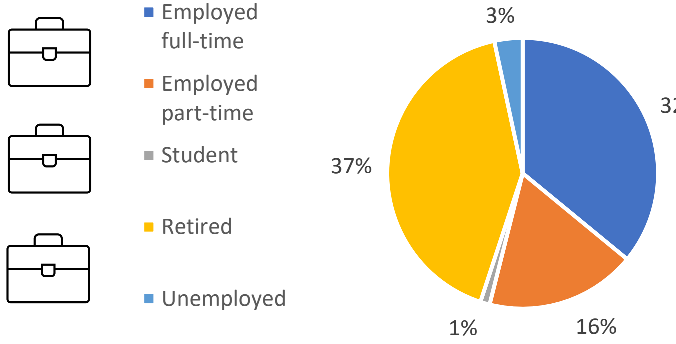
Village 31%

City 5%

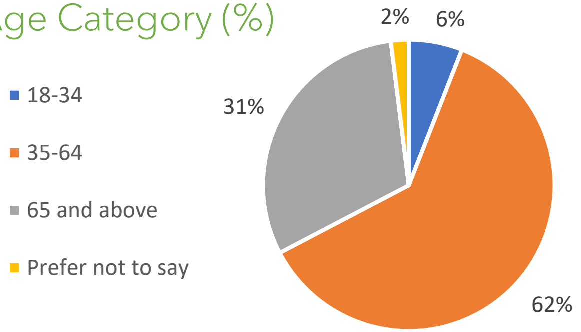
KDAONB 20%

Rural 6%

Work Status (%)



Age Category (%)



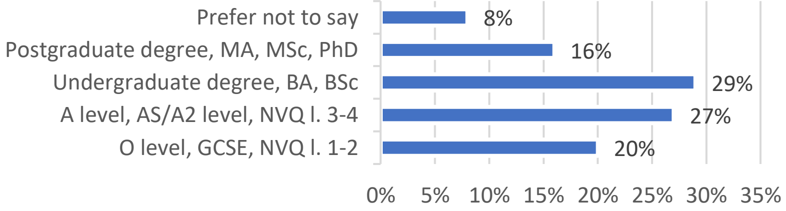
Length of Residency (%)

<5yrs 11%

5-25yrs 39%

>25yrs 51%

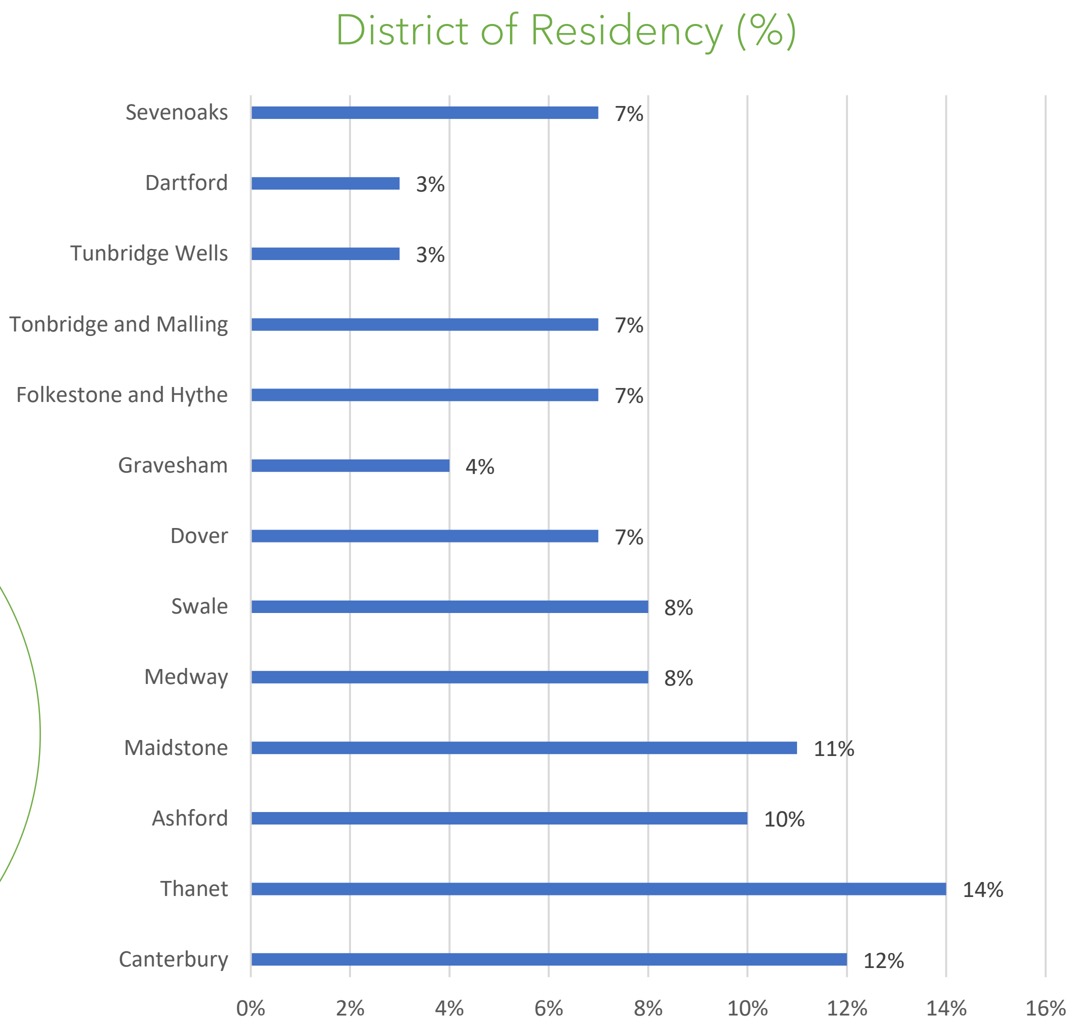
Education (%)



District

- The survey then asked respondents to specify which district they are located in. As shown in the graph, the largest proportion of residents were located in Thanet (14%), followed by those living in Canterbury (12%) and Maidstone (11%).

- The proportion of respondents located in each district does also indicate that the sample is fairly illustrative of each of Kent's regions, with representation in East, West and North Kent. Please note that when comparing results with those from the previous wave, the sample sizes of residents in each district will differ.



Tourism Industry Involvement

- Findings show that 9% of residents stated that a household member was working in the industry at the time of data collection. Although, this represents a minor proportion, results show a slight increase of +3% compared to wave 3. In addition, this also mirrors results found in wave 2 (10%).

KENT RESIDENTS SURVEY FINDINGS:

IMPACT AND BENEFITS OF TOURISM

Impact of Winter Tourism

The survey was broken down into various sections, the first of which looked at the perceived impact and potential benefits of winter tourism. Firstly, residents were presented with a list of statements about the impact of tourism on their local area, and were asked to indicate how much they agreed or disagreed with each statement.

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

In addition, as with previous waves responses have been combined for ease of presentation and interpretation, for example those that selected 'strongly agree', 'agree' and 'somewhat agree', to present an overall level of agreement. However, a full list of questions and percentages will be included in the appendices, which can be found at the end of this report.

- Wave 4 findings show that residents were less likely to agree that tourism reduces their ability to access local services and facilities, compared to wave 3. Moreover, looking at this trend overtime, results may indicate that residents are less likely to agree with this statement in the winter period, as wave 1 would have been heavily impacted by COVID-19.

- Results show a **-5%** decrease in agreement that tourism increases prices locally, whereas previously results were showing a steady increase in agreement, with this peaking in wave 3. However, this is likely due to the increase in cost living and a national high in fuel costs and inflation. And although this has declined, a significant proportion of residents are still being impacted by rising costs.

- Previously, results showed a trend of an increasing concern around the availability of parking, however wave 4 shows a decrease of **-7%** in agreement, although the majority of respondents still agreed with it.

- Consequently, this demonstrates that perceptions are improving and may be indicative of local activity to increase availability. However, this may also be due to less visitor footfall in certain areas.

Residents are less concerned about parking availability and tourism reducing access to local facilities

Agreement

	Wave 1	Wave 2	Wave 3	Wave 4
Tourism reduces my ability to access local services and facilities	23%	25%	30%	25%
Tourism increases prices for local services and amenities	45%	47%	52%	47%
Tourism limits parking spaces available to local people	71%	73%	78%	71%

- Wave 4 shows a +10% increase in agreement that transport services are improving locally, and across each wave there is a trend of steady improvement in local perceptions surrounding this. Consequently, this may indicate that residents are acknowledging local initiatives to develop local transport connections and projects. This finding may also be a reflection of there being less people commuting, and therefore meaning that services are less busy. However, it will be important that this trend continues to be monitored across future waves, as this perception may be impacted by recent rail strikes and disruptions on train lines.

- Results show a significant improvement around the perceptions of tourism's impact on improving local infrastructure, with an increase of +26% compared to wave 3, with a steady increase being seen across each wave.

- This may demonstrate the success of various projects and local initiatives to improve infrastructure such as foot and cycle paths.

- Findings show a slight decline in agreement that tourism preserves historic buildings and monuments (-4%). And although this is only minor, this trend should continue to be monitored across future waves to track any further changes in perceptions.

Agreement

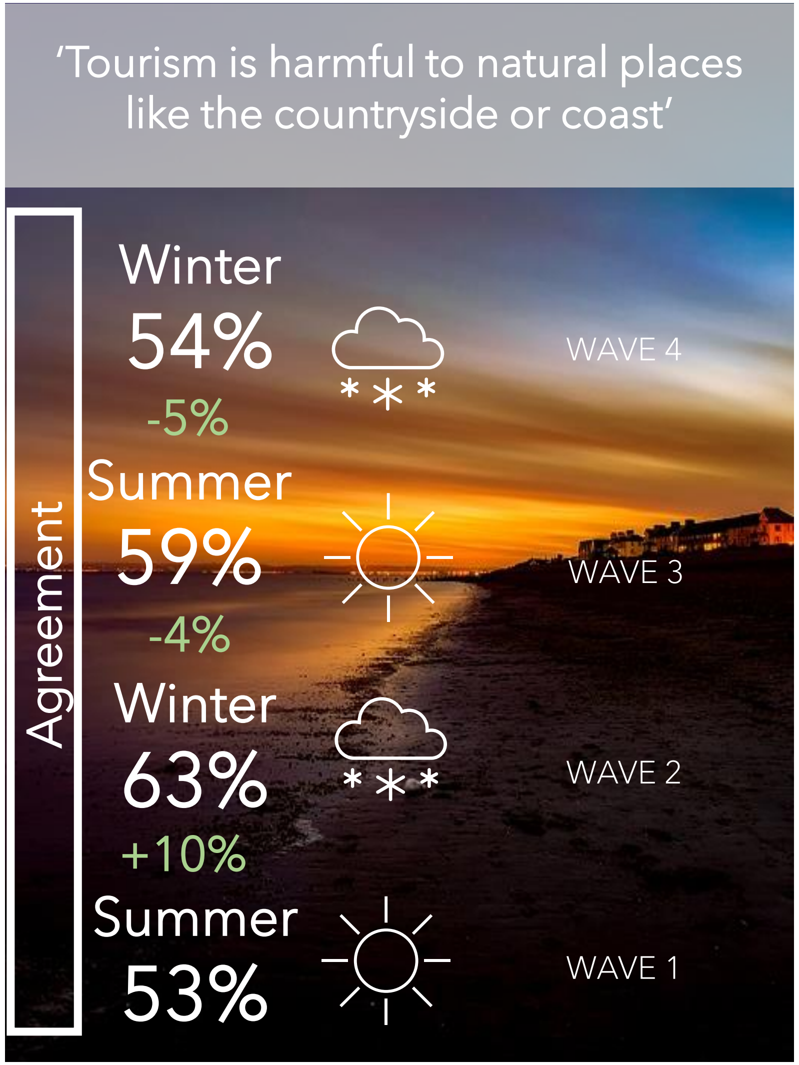
	Wave 1	Wave 2	Wave 3	Wave 4
Local transport services are improving	8%	9% ↑	13% ↑	23% ↑
Local infrastructure is improving (e.g. public toilets, car parks, playgrounds, footpaths, cycle paths)	17%	19% ↑	20% ↑	46% ↑
Tourism preserves historic buildings and monuments	93%	88% ↓	91% ↑	87% ↓

Impact on the Natural Environment

- Findings show a **-5%** decrease in agreement that tourism is harmful to the environment, with **54%** agreeing with this statement. When looking at this trend in over time, although there was an increase in wave 2, this is now seeing a steady decline.
- In support of this, results show an increase of **+4%** in agreement that tourism helps to protect the environment, compared to wave 3, although this still behind the level of agreement expressed in waves 1 & 2.

Tourism protects and enhances the natural environment
Agreement (%)

WAVE 1	WAVE 2	WAVE 3	WAVE 4
55%	51%	45%	49%



When asked for further information the following themes emerged:

- Tourism can generate income which can then be reinvested into initiatives and projects to protect and conserve the natural environment and wildlife habitats.
- Revenue needs to be managed effectively and is vital to the future of destinations.
- Tourism and increased footfall can cause significant pollution, such as litter and excessive traffic and therefore footfall needs to be managed in certain areas to minimise damage caused by visitors.
- Tourism can be a catalyst for various funding and grant opportunities, which can be used to help protect the natural environment.
- It is essential that destinations and businesses adopt sustainable tourism policies and educate visitors to respect and protect the environment when visiting.

The following questions did not show as meaningful differences compared to previous results.

Local Employment & The Visitor Economy

- Agreement that tourism increases employment opportunities, saw an **85%** level of agreement in wave 4, a slight decline of **-3%** compared to wave 3. Although this is still below the **92%** agreement seen in wave 1, this has begun to stabilise, indicating the recovery of the sector. A similar picture was seen for agreement that tourism improves the economy, with **92%** agreeing with this, compared to **94%** in wave 3, which highlights that residents positively perceive this as a significant impact of tourism activity.

Local Investment

- **79%** of residents agreed that tourism improves local investment, development and infrastructure spending in the local economy, on par with results seen in wave 3. This perception, which saw a sharp increase in wave 2, shows that residents strongly acknowledge tourism's impact on bettering local infrastructure.

Visitor Presence

- **15%** of residents felt there are too many visitors in their local area, a slight decline of **-3%** compared to wave 3. Overtime, this shows a decline compared to wave 2, where this saw an increase in agreement. This decline may be due to less visitors in certain areas, in particular rural and open areas, following the lifting of restrictions imposed during the pandemic.
- Results show an increase of **+3%** in agreement that residents like to meet visitors (**64%**), compared to wave 3. And when looking at this trend over each wave, after a decline in wave 2 during lockdown, this is now showing improvement, which may demonstrate that confidence is increasing, with residents feeling less concerned about interacting with others, due to health concerns.

Increasing the Availability of Local Facilities

- Agreement that tourism increases the availability of local facilities, was on par with wave 3 (**80%** vs. **79%**), which also aligns with previous findings that less residents agree that tourism limits their access to local facilities and amenities.

Age Catergory

- Residents aged 18-34 were more likely to agree that tourism is harmful to the environment compared to all Kent respondents (68% vs. 54%). This is a trend that has been seen across each wave and demonstrates that the younger demographic are more conscious of issues surrounding the environment and sustainability. However, when it came to the perception that tourism helps to preserve the environment, agreement was highest among residents aged 35-64 (71% vs. 49% for all respondents).
- Younger residents aged 18-34 were more likely to agree that local transport services are improving as a result of tourism compared to all respondents (34% vs. 23%). This indicates that transport is more positively perceived among this demographic, who may also be more inclined to use public transport services.
- In terms of tourism increasing prices locally, agreement was highest among the younger demographic (65% vs. 47%), indicating that they may be more financially impacted by rising costs.

Location

- Those living in rural areas were less likely to agree that tourism increases the availability of local facilities compared to all Kent respondents (73% vs. 80%) and were more likely to agree that tourism is harmful to the environment (66% vs. 54%).
- Residents in rural areas felt more impacted by tourism in terms of reduced parking (77% vs. 71%).
- Those residing in city areas were more likely to agree that tourism increases employment opportunities (93% vs. 85%), alongside local investment (86% vs. 79%), and improving of transport services (31% vs. 23%) and local infrastructure (58% vs. 46%).
- However, in rural areas, agreement that infrastructure is improving was -8% lower than all Kent results, in addition to expressing a lower level of agreement that transport is improving (19% vs. 23%), with this also being the case among those living in villages (17%).
- Overall, findings may indicate that residents in rural areas do not benefit as highly as other locations in terms of improved infrastructure and transport connections, indicating a need to invest in helping to better this in these areas. It is also evident that those in rural areas are more impacted by pollution and damage to the natural environment, and activity could be enhanced to better these perceptions.

The Kent Downs AONB

- Those living in the Kent Downs AONB were more likely to agree that tourism helps to preserve and enhance the natural environment, compared to all Kent respondents (56% vs. 49%). Furthermore, this indicates that perceptions around initiatives to conserve and protect the natural environment are more positive in this area, which may be a testament to various completed and ongoing projects being carried about by the KDAONB.
- Residents in this area were also more likely to disagree that tourism is improving local transport services (59% vs. 52%), showing a similar sentiment to those living in rural areas. Overall, this again demonstrates the need to invest in the improvement of transport infrastructure in these areas.

District

- Residents from Canterbury and Folkestone & Hythe were more likely to agree that tourism is harmful to the natural environment, such as the coast (both 63%), compared to all respondents (54%). And those from Medway scored below this at 44%.
- Residents from Folkestone & Hythe (79%), Swale (77%) and Thanet (80%), were more likely than all respondents to be concerned about parking availability (vs. 71%).
- 32% of Canterbury residents felt that are too many visitors in their local area compared to 15% among all residents.
- Those living in Dover (90%) and Folkestone & Hythe (92%) were most likely to agree that tourism increases employment opportunities, compared to 85% among all respondents, whereas this was lower in Tonbridge & Malling (73%) and Gravesham (76%).
- Agreement that tourism improves investment was highest in Dover (85%) and Medway (86%) compared to all respondents (79%). Which may be reflected by both areas having recently secured national funding to invest in regeneration.
- Compared to all respondents (23%), more residents from Gravesham (31%), Medway (30%) and Thanet (29%) agreed that transport services are improving. However, this was lower in Folkestone & Hythe (15%) and Sevenoaks (13%).
- Residents from Medway and Ashford were more likely to agree that local infrastructure is improving (both 53%), compared to all respondents (46%). This was lower in Tonbridge & Malling (36%), Dover (37%) and Thanet (38%).

KENT RESIDENTS SURVEY FINDINGS:

IMPACT ON WELLBEING & EMOTIONAL CONNECTION

Impact of Winter Tourism on Wellbeing & Emotional Connection

When looking at tourism's impact on residents' wellbeing and emotional connection to their local area, results are fairly consistent with the previous wave.

- Results show a slight increase of +3% in agreement that residents live in a beautiful area, with a total of 83% agreeing with this.
- Residents were +3% more likely to agree their area is peaceful and calm, with an additional +4% agreeing that winter tourism would not be a reason for them to move away, indicating a slight improvement in overall satisfaction.
- As shown in the diagram, sentiment is fairly steady across all other aspects, including overall satisfaction, feeling safe and visitors allowing them to feel more strongly connected to their local area.

	WAVE 1	WAVE 2	WAVE 3	WAVE 4
I am very satisfied with my life	93%	91%	87%	87%
I live in a beautiful area	82%	86%	80%	83%
My local area is peaceful & calm	69%	70%	63%	66%
Overall, I am happy with my lifestyle	93%	92%	87%	89%
I feel safe in my local area	87%	84%	82%	82%
Winter/summer tourism would not be a reason to move away	85%	85%	80%	84%
Having visitors around me helps me feel more strongly connected to my local area	51%	49%	46%	45%
I dislike living here	6%	9%	7%	8%

- Findings show a trend of steady decline that residents feel excited about their future, with 63% agreeing with this statement, a decline from 75% in wave 2.

- Residents felt most calm and relaxed during wave 2, with this declining to 72% in wave 4. This may be due to the lockdown that was in place at the time and spending more time at home.

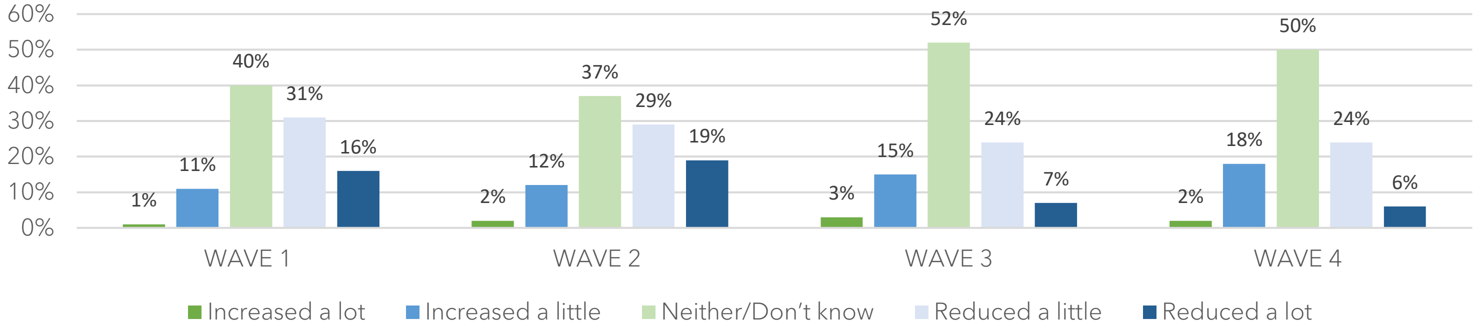
- In terms of financial security, this is seeing a steady decline, with 73% agreement compared to 82% in wave 1. This may be a reflection of the recent rises to cost of living.

- 79% agreed they feel strongly connected to their local area, up from 57% in wave 3. However, the wording of this question was amended with this previously saying do you feel more connected to your local area post COVID-19.

- Looking at the pandemic's impact on tourism and residents' quality of life, results are fairly on par with wave 3, albeit a slight increase of +2% in those feeling this has increased, with this being the highest so far (20%).

	WAVE 1	WAVE 2	WAVE 3	WAVE 4
Overall, I feel very excited about my future	70%	75%	65%	63%
Overall, I feel calm and relaxed	72%	77%	71%	72%
I feel financially secure living here	82%	80%	74%	73%
I feel strongly connected to my local area (1-3 MORE CONNECTED)	65%	65%	57%	79%

Given the impact that COVID-19 has had on local tourism, the quality of life for residents has...



Graph showing the impact of COVID-19 on quality of life BASE=1,190

Age Catergory

- Older residents aged **65+** were **+6%** more likely to agree that having visitors around helps them feel more strongly connected to their local area, a result that was also observed in previous waves (**51%** vs. **45%** for all respondents)
- Younger residents aged **18-34** were more likely to feel that their quality of life had reduced, compared to all respondents. This sentiment may be due to this demographic feeling more financial pressure. (**37%** vs. **30%**)

The Kent Downs AONB

- KDAONB residents were more likely to agree they are happy with their lifestyle compared to all respondents (**94%** vs. **89%**), alongside agreement being **+6%** above county results that they feel calm and relaxed (**78%** vs. **72%**).
- They were also **+10%** more likely to agree that they feel safe in their local area (**92%** vs. **82%**) and **+15%** above Kent results in terms of agreement that their area is peaceful (**81%** vs. **66%**). KDAONB residents were also more likely to agree that they live in a beautiful area (**96%** vs. **83%**).
- **88%** of KDAONB residents agreed they feel strongly connected to their area, compared to **79%** among all respondents and less residents felt that their quality of life had reduced following the pandemic (**23%** vs. **30%**).

District

- Compared to all respondents (**20%**), residents from Folkestone & Hythe (**28%**), Thanet (**27%**) and Ashford (**25%**), were more likely to agree that their quality of life has increased. This was lower in Tunbridge Wells (**10%**), Medway (**13%**) and Gravesham (**14%**).
- In terms of financial security, residents from Tunbridge Wells (**83%**) and Tonbridge & Malling (**82%**) agreed more so than all respondents that they felt financially secure living in their local area (**73%**). And while still positive, this was lower in Thanet (**64%**) and Dover (**68%**).

KENT RESIDENTS SURVEY FINDINGS:

VISITOR FOOTFALL AND LOCAL ENGAGEMENT

03

Visitor Footfall & Resident Engagement

Financial Impact of COVID-19 on Household

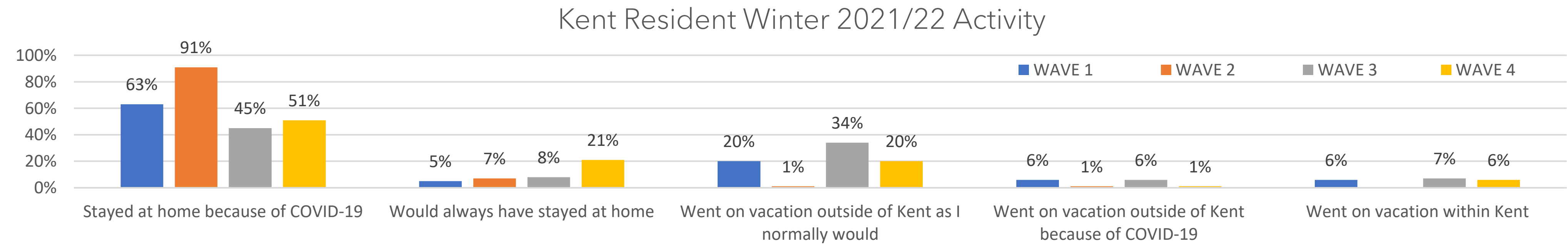
- Results show that the largest proportion (50%) of residents stated their household finances had 'stayed the same', followed by 31% selecting 'worsened slightly' and those selecting 'worsened significantly', and 'improved' (both 10%).
- Overall, there was a +10% increase in residents stating their household finances had worsened compared to wave 3, which may be a result of the increases to cost of living.

Impact to Household Finances since COVID-19

	WAVE 1	WAVE 2	WAVE 3	WAVE 4
Improved	9%	16%	15%	10%
Stayed the same	55%	55%	55%	50%
Worsened slightly	27%	22%	22%	31%
Worsened significantly	9%	8%	9%	10%

Winter Activity

- In terms of resident activity in winter 21/22, 51% of residents stayed at home due to COVID-19, +6% higher than wave 3, but substantially lower compared to the first two waves. 20% of residents stated they went on a trip outside of Kent as they normally would, down -14% compared to wave 3.
- There was also a -5% decrease in those going on a trip outside of Kent due to the pandemic. A similar percentage of residents stated they went on a trip within Kent, and -5% less stated they took a trip within Kent as a result of COVID-19. Overall, COVID seems to be less of a factor for some, although the increase in those staying at home may show some concerns among residents still, however the decrease in trips may be due to financial constraints.



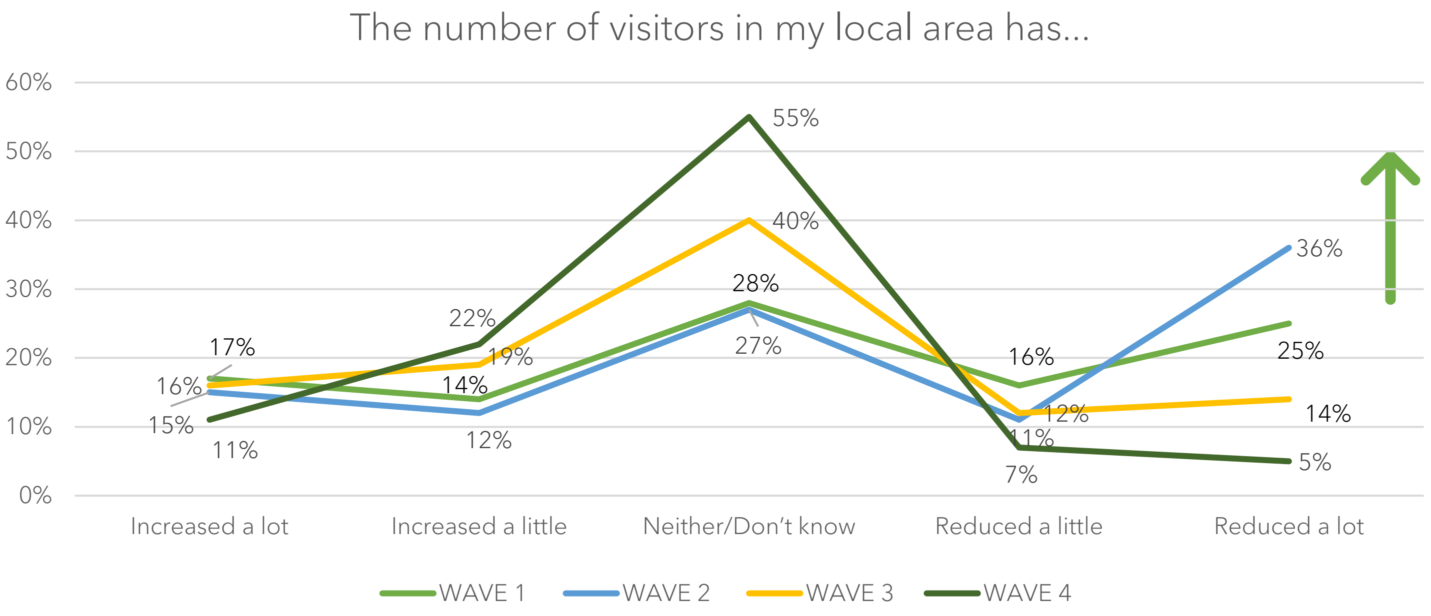
Graph showing Kent resident activity in winter 21/22 BASE=1,190

Change in Visitor Numbers

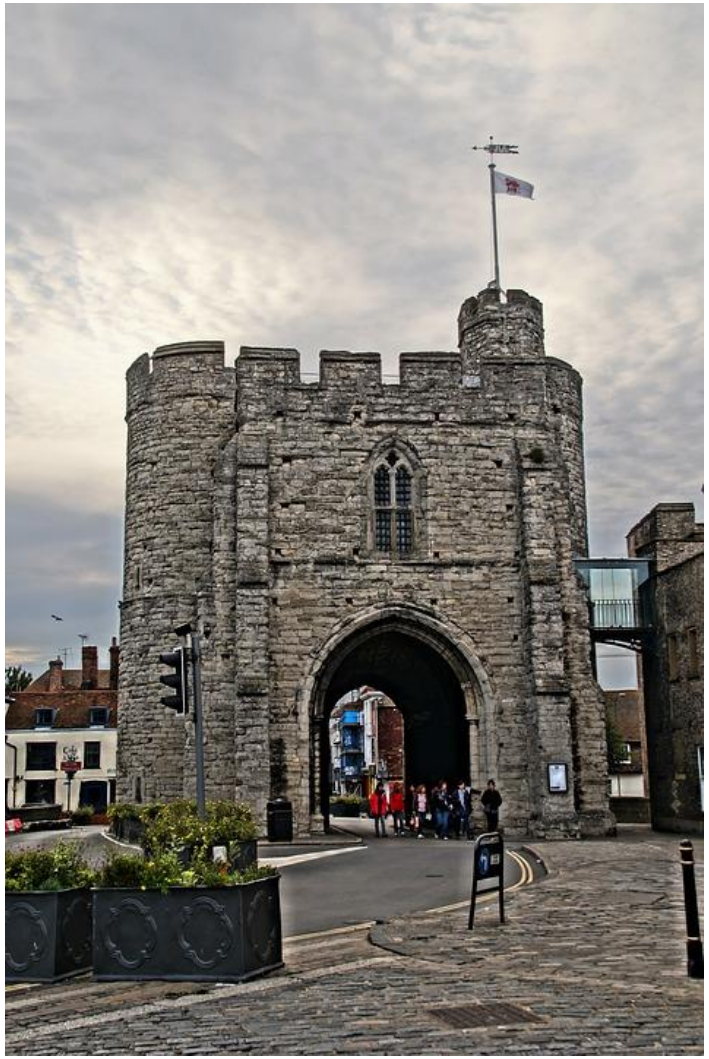
Respondents were asked if they had observed any changes in visitor footfall in their local area during winter 2021/2022.

- As illustrated in the graph below, the largest proportion of residents selected 'neither/don't know' (**55%**). However, **33%** specified numbers had increased, with the remaining **12%** observing a reduction in footfall.

- Overall, results show a **+15%** increase in those selecting 'neither/don't know', which may indicate more stability in terms of footfall changes, with a similar percentage as wave 3 feeling this had increased and **-14%** less specifying they had observed a decrease in visitors.

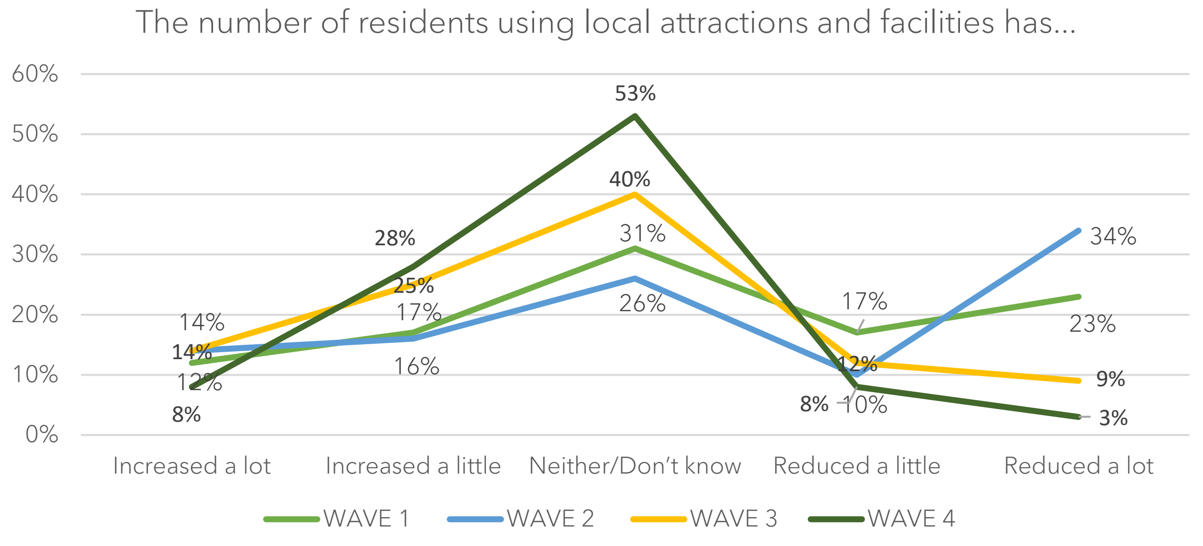


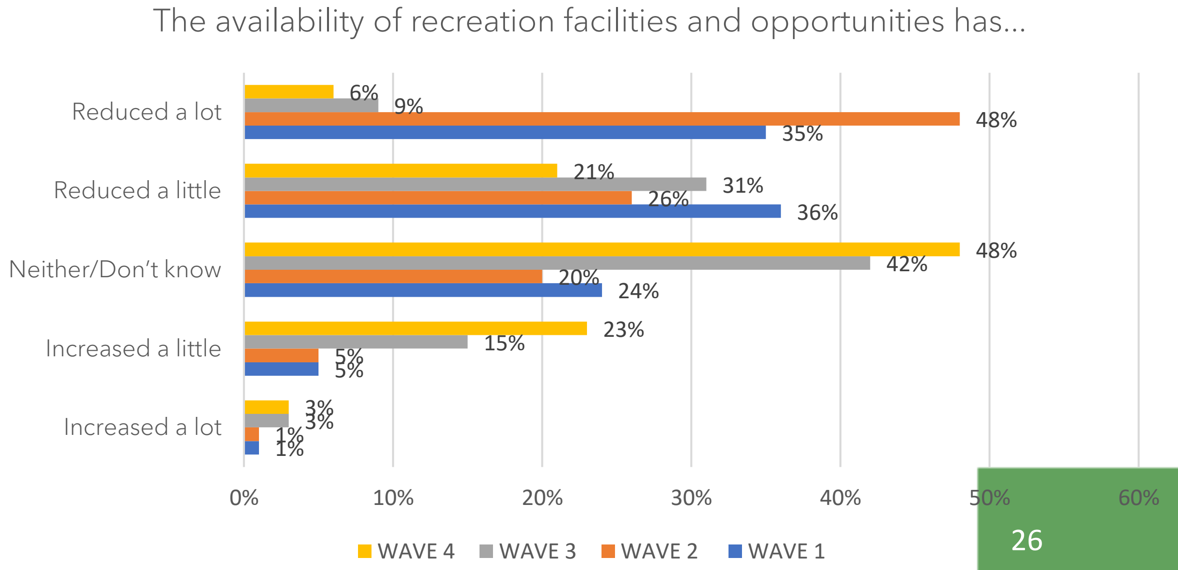
Graph showing changes to visitor footfall BASE= 1,190



Participation and Availibility

- Wave 4 shows a **+13%** increase in the number of respondents selecting 'neither/don't know', when asked if the number of residents using local attractions and facilities had changed, alongside **-10%** less stating this had decreased.
- A similar pattern was observed when asking residents if the number of cultural attractions available to visit had changed, with an additional **+8%** specifying 'neither/don't know'. An additional **+8%** also specified the availability of cultural attractions had increased, and **-17%** less felt availability had decreased.
- There was an **+8%** increase compared to wave 3 that the availability of recreation facilities and opportunities has increased (**26%** vs. **18%**). Overall, agreement that these facilities are increasing is seeing a steady trend an improvement over each wave, indicating that residents are acknowledging the improvement of these types of facilities and opportunities in their local area.
- Results show a slight increase of **+4%** vs. wave 3 that during winter the number of cultural and recreational activities residents took part in increased, the highest so far. However, there was also an **+11%** increase in those selecting 'neither/don't know'.
- Overall, the increase in residents selecting 'neither/don't know' may indicate more stability in terms of changes to residents' participation and availability of local amenities.





INCREASE IN VISITORS

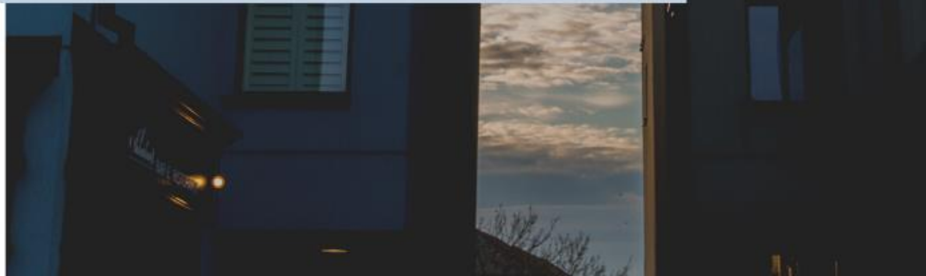
- Findings mirror trends observed previously that those who noticed an increase in visitor numbers were more likely to state that there has been an increase in residents using local attractions and facilities and cultural sites.
- Residents who observed an increase in footfall were more likely than all respondents to have taken a trip outside of Kent as they normally would (23% vs. 20%). In addition, 10% of these residents went on a trip within Kent, compared to 6% among all respondents. Consequently, this may demonstrate that those in areas with increased footfall, may look to visit elsewhere to escape the crowds.
- Districts more likely to have observed an increase in visitors included, Canterbury (48%), Folkestone & Hythe (45%) and Thanet (43%), compared to all respondents (33%).

DECREASE IN VISITORS

- As expected, mirroring summer 2021 results, findings show a correlation between a decrease in visitors and a decrease in the number of residents using local attractions and recreational facilities.
- Residents from Tunbridge Wells (13%), Maidstone (21%) and Tonbridge & Malling (23%), were less likely to have observed an increase in visitor footfall compared to all respondents.

KENT RESIDENTS SURVEY FINDINGS:

WORKING PATTERNS AND ENGAGEMENT WITH LOCAL FACILITIES



Working Patterns and Engagement with Local Facilities

As a new addition to the survey, respondents were asked to specify what best describes their working pattern considering the pandemic.

- As illustrated in the table, the largest proportion of residents (**36%**) specified they have always travelled to work, and continued to do so during the pandemic. This was then followed by **30%** whose organisation introduced working from home as a result of the pandemic, and have continued hybrid measures, with a mix of office and home-based working.
- Findings show that **12%** of residents have always worked from home, with **8%** having already began working in a hybrid way prior to COVID-19.
- Only **7%** of residents specified that previously introduced working from home measures had ended, with them returning to the office full-time.
- Overall, results show that many residents may be key-workers or working in industries that continued to operate more normally over the pandemic.
- In addition, findings also demonstrate the growing adoption of hybrid working measures among organisations, and as a result local residents are spending more time in their local area.

Looking at the following statements, which one best describes your working patterns considering the COVID-19 pandemic?	%
I have always travelled to work, and I have continued to do so over the pandemic	36%
I have always worked from home	12%
Since the pandemic, my organisation introduced working from home measures, but I have now returned to the workplace full-time	7%
Since the pandemic, my organisation introduced working from home and hybrid measures that are continuing, and this is now combined with days at the workplace	30%
Prior to the pandemic, I had already began working in a more hybrid way (for example working from home on certain days)	8%
Other	6%

Residents who have lived in their local area for under 5 years, were more likely than all respondents to have always worked from home (**16%** vs. **12%**) and already working in a hybrid way prior to the pandemic (**16%** vs. **8%**). This difference may show that their choice of residency may have been influenced by not having to commute to work or are easily able to do so on certain days to areas like London.

Engagement with Local Facilities

The survey then asked residents who stated they work from home in some capacity, about their engagement with local amenities and outdoor green spaces.

- Results show that engagement with local cafes and shops was fairly split, with 43% of residents both agreeing and disagreeing with this statement.
- However, engagement with outdoor green spaces for walks and cycling was much higher, with 69% of respondents agreeing that they use these more frequently when working from home. Although engagement with local amenities is still high, this difference in agreement may be due to factors such as using green spaces for wellbeing purposes, and these being free to access.

- Residents aged 18-34 were less likely to use outdoor green spaces compared to all respondents (59% vs. 69%), which may show the need to encourage use among this group for wellbeing purposes.
- KDAONB residents were more likely to use both local cafes and shops (51% vs. 43%) and green spaces (76% vs. 69%), compared to all respondents, which perhaps illustrates having easier access to these in their locality.
- Those living in a city were more likely to use local cafes and shops (63% vs. 43%), perhaps due to having more choice and being in closer proximity. 21% of those living in rural areas agreed with this, with perhaps having more limited choice within walking distance.
- Those in rural areas were most likely to use green spaces (84% vs. 69%), which are likely in more abundance in these locations.

When working from home, I use more local cafes and shops

Agree	Disagree
43%	43%

When working from home, I access outdoor green spaces for walks or cycling more frequently

Agree	Disagree
69%	31%

KENT RESIDENTS SURVEY FINDINGS:

RESIDENT TRAVEL BEHAVIOUR AND PERCEPTIONS

05

Resident Travel Behaviour and Perceptions

This section contains additional questions and aims to gain an insight into resident travel behaviour and perceptions of the county as a tourist destination. Insights gained will also help to develop the 'hyper-local' market segment, in terms of identifying activities and sources of information residents look for.

Tourist Destination

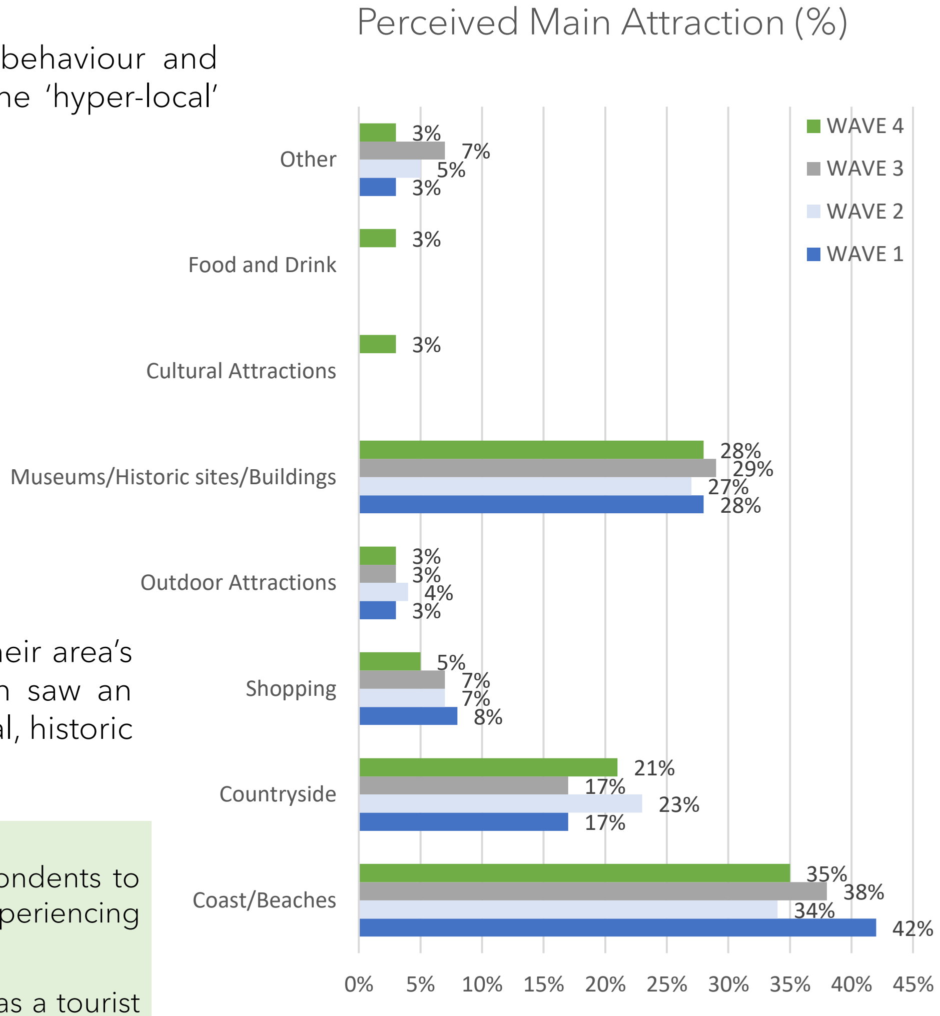
- 72% of residents agreed that they consider their local area as a tourist destination, a +9% increase compared to wave 3. This could indicate that residents would consider areas in the county for a leisure day trip or staycation.

Do you consider your local area as a tourist destination?

WAVE 1	WAVE 2	WAVE 3	WAVE 4
Yes 67%	Yes 65%	Yes 63%	Yes 72%

Main Attraction

- As with previous waves, the largest proportion of residents perceived the coast/beaches as their area's main attraction (35%), followed by heritage attractions (28%) and countryside (21%), which saw an increase of +4% compared to wave 3. Overall, these results illustrate the strength of Kent's rural, historic and coastal offering in the minds of residents.



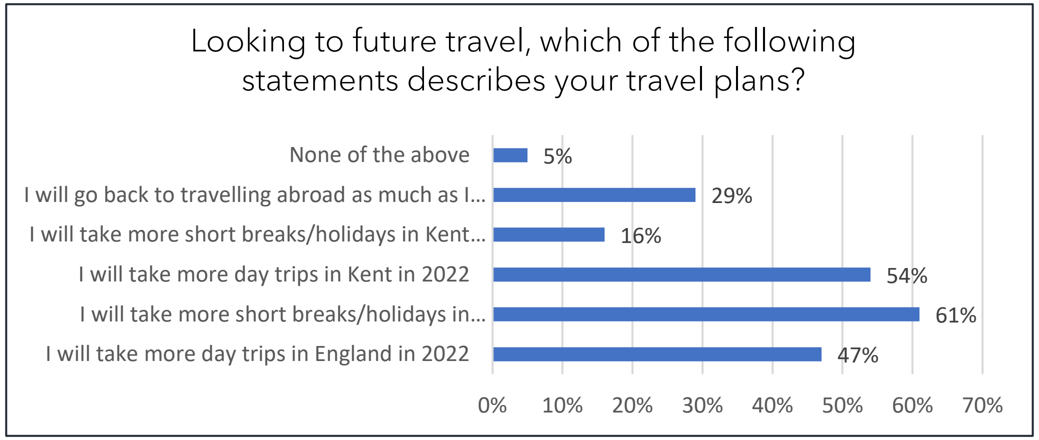
- Residents who perceive the coast/beaches as their main attraction were more likely than all respondents to have observed an increase in footfall (42% vs. 35%). This may indicate that coastal areas could be experiencing overcrowding in some areas.
- Residents living in the KDAONB were more likely than all respondents to consider their local area as a tourist destination (79% vs. 72%).

Leisure Travel Behaviour

- 52% of residents stated they have made short-term changes to their leisure travel behaviour due to the pandemic, but that their holiday choices will return to normal in the next year or two. This was followed by 30% whose short-term changes are likely to influence their holiday plans long into the future, with the remaining 18% having not changed their travel behaviour as a result of COVID-19.

- Looking at demographics, residents aged 18-34 were least likely to state that short-term changes will influence future travel. Overall, results indicate that the pandemic has had a considerable impact on travel behaviour.

Do you think any changes you have made to your leisure travel behaviour are long term/permanent changes, or do you think you will return to pre-COVID behaviours in a year or two?	%
I have not changed my holiday plans or choices as a result of COVID	18%
I have made some changes, but they are just short-term, and I will return to pre-COVID holiday choices in the next year or two	52%
I have made some changes to my holiday plans in the short-term, and they are likely to influence my holiday plans long into the future	30%



- Looking to future travel intentions, 61% of residents stated they will take more short breaks/holidays in England in 2022, alongside 16% in the case of trips within Kent.

- In terms of appetite for day trips, this stood at 47% for England and 54% for Kent. Findings also show that 29% will go back to travelling abroad as much as they did prior to the pandemic.

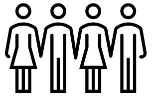
- These results show appetite for travel in general and within the county, presenting an opportunity to promote staycations and day trips within Kent, to allow residents to further explore the county.

- Residents living in a city were slightly more likely to state they will take more short-breaks/holidays in Kent during 2022 than all respondents (18% vs. 16%), which may indicate those living in more built-up areas may look to escape to more rural or coastal destinations to avoid crowds. This group were also less likely to want to take day trips in Kent, as they may live in popular day trip areas.

- Residents who observed an increase in footfall were more likely to take more short-breaks in Kent (19% vs. 16%), which again may indicate the desire to avoid busy areas. Residents aged 18-34 also expressed a higher interest in taking short-breaks in Kent compared to all respondents (24% vs. 16%).

VFR Visits

- Results show that 34% of residents have had friends and relatives to stay with them in the last 6 months for leisure purposes.
- This therefore indicates that just over a third of respondents have taken VFR leisure visits within the country, and demonstrates an opportunity to integrate this market into the hyper-local audience.
- Findings also show that residents living in the KDAONB were more likely to have had VFR visits (40%), alongside those who have lived in their local area for under 5 years (51%).
- This perhaps highlights the appeal of the KDAONB area, alongside more recent residents wanting to showcase their local leisure offering.



Have you had any friends and relatives to stay with you in the last 6 months for leisure purposes?

Yes	No
34%	66%

The survey then asked residents – Based on your experience as a visitor within Kent, for a day trip or a short-break, when showing friends and relatives around Kent, where would you take them or what would you recommend that they do? Responses were analysed and categorised thematically by the frequency in which they were mentioned.

- Overall, residents most commonly stated that they would take their friends and family to various castles in the county, with the top three being Leeds, Dover and Hever Castle. Other popular attractions included National Trust properties, Canterbury Cathedral, The Historic Dockyard, Chatham and Folkestone Harbour Arm.
- In terms of destinations, the most popular answers included Canterbury, followed by Dover, Whitstable and Rochester.
- Other common themes included the countryside, such as The North Downs and country parks. Alongside this, the coastal offer emerged strongly, predominantly including visiting the beach and coastal towns.
- Residents also cited walking, alongside various eateries such as country pubs and restaurants.

Attractions

Castles, Leeds Castle
Dover Castle, National Trust
Hever Castle, Canterbury Cathedral
The Historic Dockyard, Chatham
Folkestone Harbour Arm
English Heritage, The White Cliffs
Walmer Castle
Turner Contemporary
Knole Park, Dreamland
Wildwood, Port Lympne
Rochester Castle

Destinations

Canterbury
Dover
Whitstable
Rochester
Broadstairs
Folkestone
Margate, Chatham
Faversham, Ramsgate
Hythe, Sandwich
Dungeness, Thanet
Tenterden

Countryside

Countryside
The North Downs
Country parks
Country walks

Coastal

The Coast
Beaches
Coastal towns
Coastal walks

Food, Drink & Walking

Walking
Old town
Country pubs
Local pubs
Local restaurants

Sources of Information

The survey asked residents which sources of information they would use to plan a trip within the county. Overall, the top three sources included -

1. Specific attraction website (67%)
2. Kent destination website (57%)
3. Review website e.g. TripAdvisor (47%)

Followed by –

Ask friends & family for recommendations
40%

Landscape or wildlife information site
35%

- Destination, attraction and landscape websites scored highly, demonstrating the importance of maintaining and sharing inspirational content on these channels.
- Review websites and recommendations from friends and family were also rated highly, highlighting the power of reviews and maintaining high levels of satisfaction.

18-34

Although all ages selected the same top three, **18-34's** were more likely to use review websites (**75%**), recommendations on social media (**56%**) and opinions of bloggers and influencers (**13%**). This highlights the importance of social channels among this group, with this being significantly lower among other age groups.

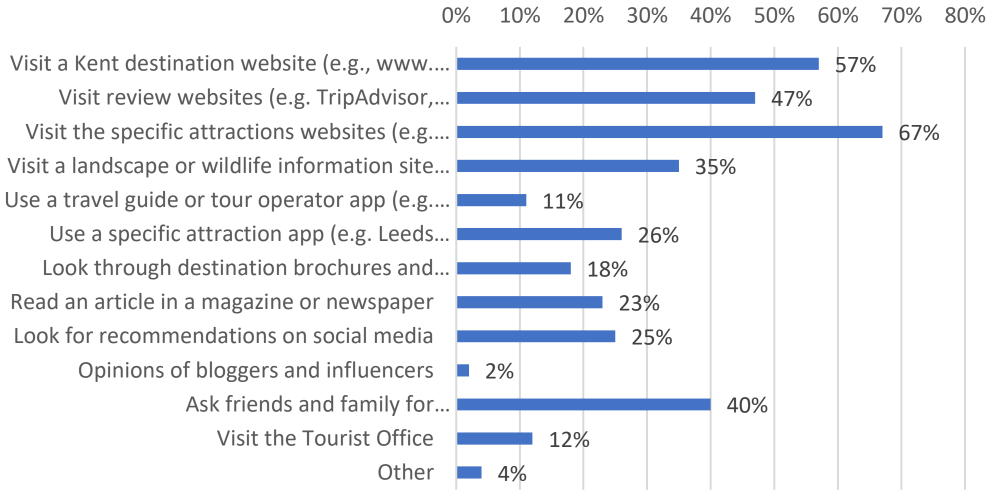
35-64

35-64's were most likely use a Kent destination website (**60%**), alongside landscape or wildlife information sites (**37%**).

65+

Those aged **65+** were most likely to use a specific attraction app (**31%**) and destinations brochures and leaflets (**21%**), highlighting the appeal of printed media and app guides among this demographic.

If you were planning a future day trip or overnight stay in Kent to explore your local area further, which of these resources would you be likely to use to plan your visit?



Sources of Information	All	18-34	35-64	65+
Visit review websites (e.g. TripAdvisor, Booking.com, Expedia)	47%	75%	51%	35%
Visit a Kent destination website (e.g., www.visitkent.co.uk, www.explorekent.org, www.whatsoninkent.com, www.kentdowns.org.uk)	57%	52%	60%	52%
Visit the specific attractions websites	67%	57%	68%	67%
Visit a landscape or wildlife information site (e.g., www.kentdowns.org.uk; www. kentwildlifetrust.org.uk, Woodland Trust or RSPB)	35%	28%	37%	30%
Use a specific attraction app (e.g. Leeds Castle, Canterbury City Guide)	26%	9%	25%	31%
Look through destination brochures and leaflets	18%	7%	16%	21%
Look for recommendations on social media	25%	56%	29%	12%
Opinions of bloggers and influencers	2%	13%	2%	1%
Ask friends and family for recommendations	40%	46%	45%	29%

KENT RESIDENTS SURVEY FINDINGS:

OVERALL SUPPORT OF TOURISM & TOP POSITIVE AND NEGATIVE IMPACTS

Overall Support of Tourism

- Results show that **85%** of residents agreed that they support winter tourism in their local area, a sentiment that has been consistent across each wave.

- Findings show that a significant proportion of residents (**62%**), agreed that working in the tourism and hospitality industry is an attractive career. However, this was lower among residents aged 18-34 (**41%**) and those living in rural areas (**58%**). As this was a new question added to the survey, future waves will continue to monitor this.

- **78%** of residents stated that the overall impact of tourism on Kent is positive, with **4%** selecting 'no' and the remaining **14%** selecting 'don't know'.

- When comparing the sentiment around overall impact of tourism to previous waves, findings show a **-9%** decline in those feeling this was positive, compared to wave 3. However, this shortfall is largely due to an increase of **+7%** in residents selecting 'don't know'. Consequently, this potentially demonstrates the need to re-balance this by increasing the awareness of beneficial tourism activity within local communities.

Overall impact of tourism on Kent?

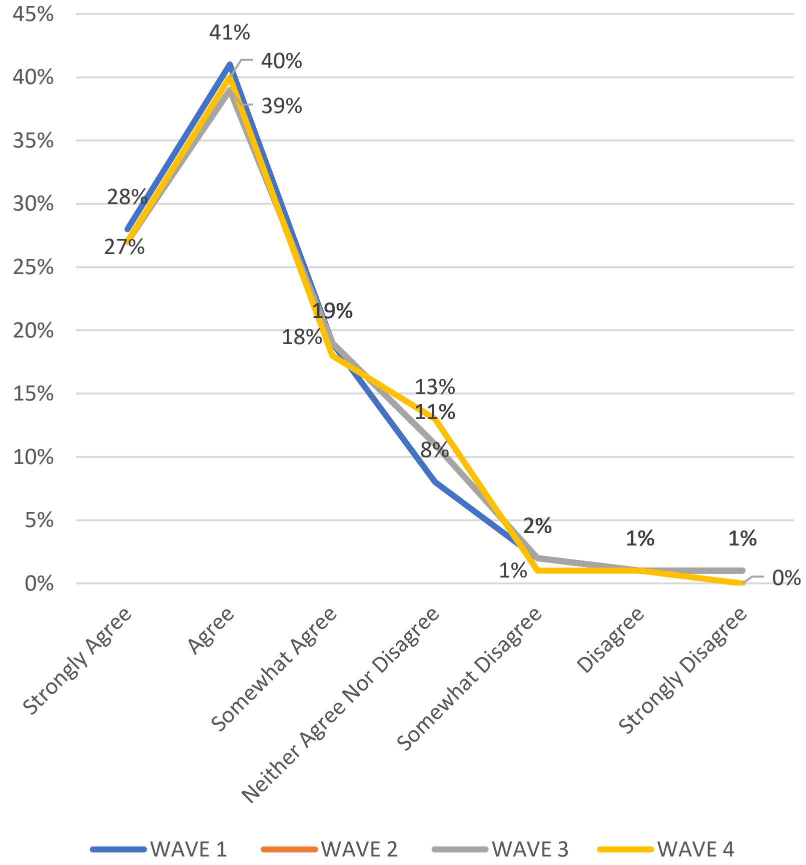
Positive	Negative	Don't Know
78%	**4%**	**14%**

BASE= 1,190

Do you think that working in the tourism/hospitality industry is an attractive career?

Yes	No
62%	38%

Resident support of winter tourism in their local area



Graph showing the % of respondents and their level of agreement with the statement 'I support tourism in my local area' BASE= 1,190

Top Positive & Negative Impacts of Tourism

Positive

Respondents were asked to specify the top three positive and negative impacts of tourism on their local area. The diagram here illustrates the most frequently mentioned positive words, indicated by the size of the words displayed.

- As highlighted in previous waves, residents most commonly specified that tourism helps to enhance the economy and bring income to the local area.
- Similar to the above, jobs and employment opportunities were also commonly mentioned by residents as a positive impact of tourism activity.
- Responses also included that tourism helps to attract investment and improve local facilities, alongside bettering its historical offering and countryside.
- Pubs, restaurants, events, shops and culture were also mentioned, which may indicate that residents feel that tourism creates a vibrant place to live and supports town centres.
- Other positive aspects included tourism's ability to help maintain and build destinations, alongside bringing people to the area and creating a diverse and new offering.
- Overall, responses mirror findings from previous waves, with residents feeling that tourism brings significant positive impacts to their local area.

Negative

The diagram here highlights the most commonly mentioned negative impacts of tourism.

- Overall, issues surrounding parking availability was the most commonly cited negative impact, an aspect that also emerged strongly in previous waves.
- Responses also show that residents are concerned about the increasing damage to the natural environment and local wildlife.
- Residents expressed concerns that tourism is resulting in excessive traffic in the area, resulting in congestion and overcrowding.
- Other aspects that were commonly mentioned included, increased prices, behaviour of visitors and poor facilities and town centres.
- Overall, results do mirror sentiment expressed in previous waves and it is evident that environmental damage and access to local facilities are pressing issues.

Additional Comments

Finally, the survey also gave residents the opportunity to leave any additional comments they might have about the impact of tourism on their local area, or regarding the answers they gave throughout the survey. The following diagram presents a sample of comments given.

"Too many people equate day trips with driving to their destination. Too little is done to discourage driving for day trips"

"Local facilities e.g. public toilets, car parks insufficient"

"I think the situation has changed now because of Brexit and there will be far fewer school parties visiting for the day"

"I worry about our beautiful countryside disappearing, it is so precious it should be protected and the rules respected"

"Rural areas should have more designated parking spots to allow walkers to easily walk in remote areas. Even better if there were buses for walkers going into the AONB"

"The infrastructure of my area cannot cope with the flow of traffic at weekends so to have more would grind it to a halt as it does in the summer months"

"Tourism is a positive thing and should be invested in and will then reap rewards both materially and generally, making a place more vibrant and offering more for locals as well as visitors"

"It brings much needed jobs and cash into the area"

"A large part of me wants to see more people walking, running and cycling in the country side but this needs to be done with regard to the environment and local people. I guess its about educating people"

"I think winter tourism is quite low so any impact is not noticeable"

"I like the idea that people would visit an area that I live in and I feel it improves the cultural and economical side to the area for everyone to enjoy"

"Tourism does bring a lot of positives but also just as many negatives which are not always addressed and sometimes only picked up through community groups rather than our council"

Key Takeaways & Recommendations

Key Findings & Recommendations

Parking

- Perceptions around parking availability saw an improvement, which may demonstrate the impact of various actions. However, when asked about the top negative impacts of tourism, parking emerged strongly which demonstrates the need to further monitor this and still focus activity on ensuring residents have adequate parking.

Transport

- Findings show an increase in agreement that transport services are improving, with a steady increase across each wave. This may indicate that in some areas residents are acknowledging improvements that are being made, however it will be important to continue to monitor this trend, as this may be impacted by recent rail strikes and disruption on train lines.
- Findings also show that there may be a need to improve transport services in more rural areas, with perceptions not being as positive, compared to those in urban areas.

Infrastructure

- Results show a significant improvement around local infrastructure, with a steady increase across each wave. This may demonstrate the success of various projects and local initiatives to improve various infrastructure such as foot and cycle paths.

Sustainability

- Perceptions that tourism is harmful to the natural environment are improving, however it will be important to maintain and improve this moving forward.
- Residents acknowledge that income generated from tourism can be reinvested into initiatives to protect the natural environment, alongside attracting various funding and grant opportunities. However, this needs to be managed effectively, to ensure the viability of our destinations' future. It is therefore essential that organisations adopt sustainable tourism policies and that messaging to visitors encourages them to respect and protect the natural environment.

Finances

- Findings show that for some residents their household finances have worsened, and that financial security is seeing a steady decline. However, it is likely that this may reflect the rises in cost of living. Moving forward, it will be important to continue to monitor this sentiment and to be conscious that consumers may not have as much disposable income.

Key Findings & Recommendations

Working from home

- Findings demonstrate organisations' growing adoption of hybrid working measures and that as a result local residents are spending more time in their local area.
- Residents who have lived in their local area for under 5 years, were more likely to work from home, which may demonstrate the appeal of living in the county and being easily able to commute to areas like London less regularly, benefiting from transport connections.
- Findings show that residents do engage with local cafes, shops and outdoor areas for walking and cycling when working from home, particularly green spaces which may be used for wellbeing purposes. However, there may be a need to increase participation with outdoor green spaces among younger residents, alongside those in more built-up areas.

Travel Intent

- Findings show that there is an appetite among local residents to take more day trips and short-breaks in Kent in 2022. This presents an opportunity to promote staycations and trips within Kent, to allow residents to further explore the county, including promoting unique accommodation options and new experiences.
- There may also be an opportunity to promote short-breaks to the younger demographic alongside those living in more built-up areas, to escape to more rural landscapes and enjoy the countryside.

VFR Visits

- Just over a third of local residents have had friends and family to stay in the last six months for leisure purposes, which indicates that there is a significant opportunity when promoting places to visit in the county to this market.
- Residents most commonly cited heritage attractions such as castles and National Trust properties as being the places they would take or recommend their friends and family to visit. Responses also included towns with a strong coastal offering or those with major heritage attractions, together with countryside and coastal walks and local eateries.
- Mentions of local eateries and shopping outlets also highlights the importance of the place beyond visitor attractions, as a catalyst of tourism development.

Key Findings & Recommendations

Sources of Information

- Kent destination and specific attraction websites emerged strongly as sources of information when planning a local trip, demonstrating the importance of maintaining and sharing inspirational content on these channels.
- Review websites and recommendations from friends and family were also highly used, highlighting the power of reviews and maintaining high levels of customer satisfaction.

Overall Support

- Overall support for tourism was positive, however overall impact of tourism on Kent did see a decline and an increase in residents selecting 'don't know'. Consequently, this demonstrates the need to re-balance this by increasing the awareness of beneficial tourism activity among local communities.
- A significant proportion of residents agreed that working in the tourism and hospitality industry is an attractive career. However, this was lower among younger residents and those living in rural areas, indicating the need to improve this perception among these groups and better opportunities in the industry.

The following outlines findings by age to more fully understand resident preferences and behaviour, to further develop local audience insights for leisure visits.

18-34

- More likely to perceive the coast/beaches as their area's main attraction, alongside shopping and food & drink
- Most likely age to use social media recommendations and opinions of bloggers & influencers
- They expressed the most interest in taking more short-breaks in Kent in 2022 and were least likely to make changes to future travel due to COVID
- More likely to positively perceive public transport use
- More likely to be concerned about prices and sustainability
- Favour destinations such as Canterbury, Folkestone & Hythe & Whitstable & top attractions such as, Canterbury Cathedral, Dover Castle and The White Cliffs
- May look for experiential activities such as, ghost tours, escape rooms and strawberry picking, alongside food & drink, events and festivals
- Beaches favoured highly, followed by countryside and heritage

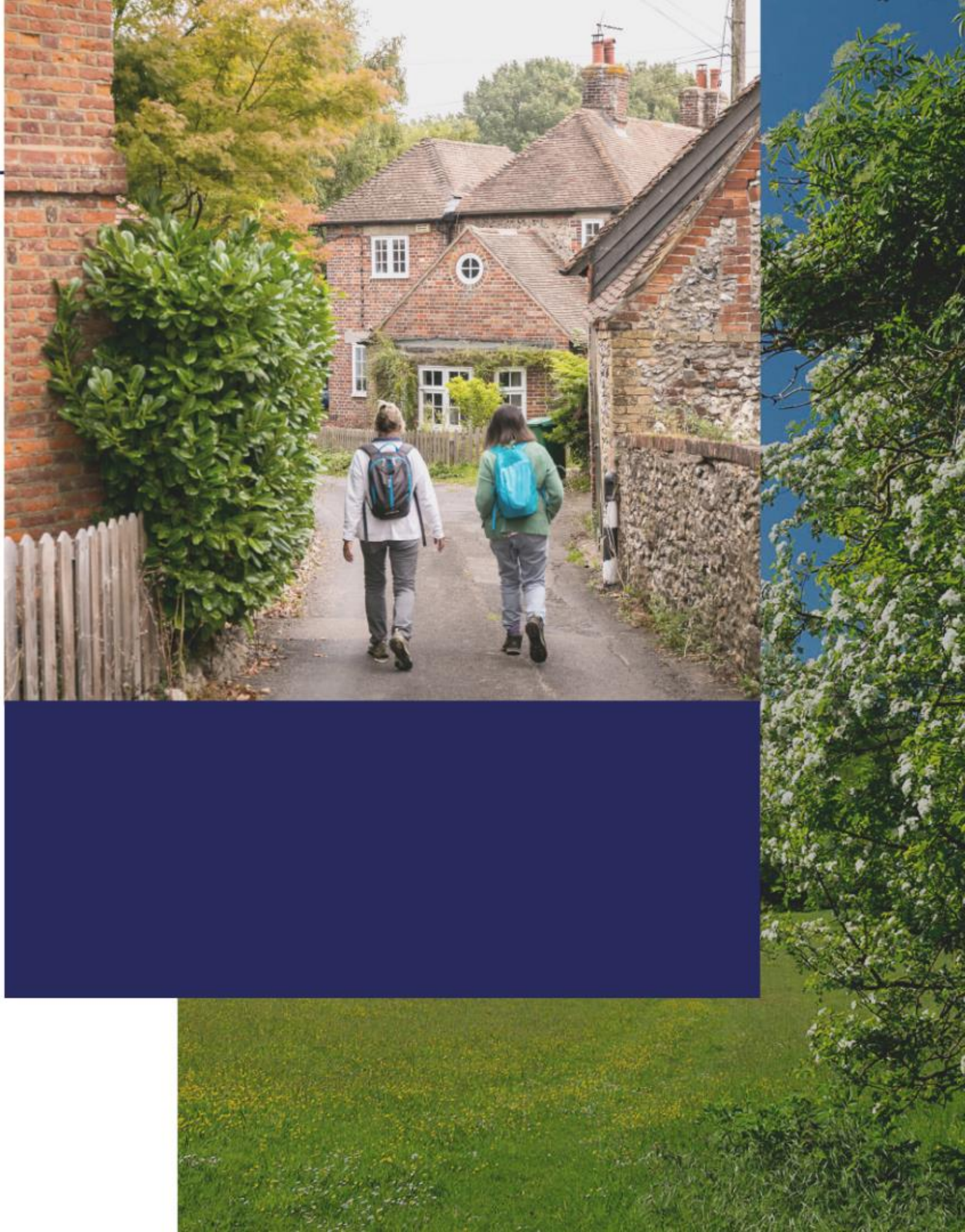
35-64

- Look to friends and family for recommendations and are more likely to use Kent destination and landscape/wildlife websites
- Most likely age group with a desire to take more day trips in Kent in 2022
- More likely to feel that tourism protects and enhances the natural environment
- Likely to use outdoor, green spaces for walking and cycling when working from home
- Most likely to change their travel habits long-term due to COVID-19
- Favour destinations such as Canterbury, Dover, Whitstable & Rochester & attractions including Leeds, Dover & Hever Castle & The Historic Dockyard, Chatham
- Look for National Trust properties, coastal areas, parks, walking, wildlife attractions, countryside & heritage

65+

- Look for specific attraction apps as guides and are more likely to use printed media, such as booklets and leaflets
- More likely to consider day trips within Kent than short-breaks
- Most likely to feel that having visitors around them makes them feel more strongly connected to their local area
- A high percentage considered their local area as a tourist destination
- Favour destinations such as Canterbury, Dover, Whitstable & Rochester & attractions including Leeds and Dover Castle, Canterbury Cathedral & The Historic Dockyard, Chatham
- Look for historic attractions and stately homes, such as National Trust & English Heritage properties, alongside coastal and countryside areas for walking and river trips

APPENDICES



In my local area in a typical summer/winter									
Tourism preserves historic buildings and monuments	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	37%	40%	16%	3%	2%	1%	0%	93%	3%
WAVE 2	28%	41%	19%	7%	3%	2%	1%	88%	6%
WAVE 3	27%	43%	21%	6%	3%	1%		91%	4%
WAVE 4	31%	36%	20%	7%	3%	2%	0%	87%	5%
Tourism increases demand for local historical and cultural attractions	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	41%	44%	10%	3%	1%	1%	0%	95%	2%
WAVE 2	32%	44%	16%	5%	2%	1%		92%	3%
WAVE 3	33%	46%	15%	3%	2%	1%		94%	3%
WAVE 4	35%	44%	15%	4%	2%	1%	0%	94%	3%
Tourism increases availability of local recreation facilities/opportunities	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	28%	37%	21%	9%	4%	2%	0%	86%	6%
WAVE 2	21%	40%	21%	11%	4%	2%	1%	82%	7%
WAVE 3	18%	37%	24%	12%	6%	4%	1%	79%	11%
WAVE 4	19%	35%	26%	12%	5%	2%	0%	80%	7%
Tourism is harmful to natural places like the countryside or coastal areas	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	4%	7%	42%	16%	17%	11%	4%	53%	32%
WAVE 2	6%	13%	44%	16%	14%	6%	1%	63%	21%
WAVE 3	5%	15%	39%	19%	14%	6%	2%	59%	22%
WAVE 4	4%	9%	41%	20%	16%	9%	2%	54%	27%
Tourism limits parking spaces available to local people	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	17%	24%	30%	14%	7%	7%	2%	71%	16%
WAVE 2	17%	28%	28%	15%	7%	5%	1%	73%	13%
WAVE 3	24%	28%	26%	13%	6%	3%	1%	78%	10%
WAVE 4	15%	25%	31%	17%	8%	3%	0%	71%	11%
There are too many visitors in my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	3%	5%	8%	26%	19%	30%	10%	16%	59%
WAVE 2	5%	6%	11%	29%	18%	23%	8%	22%	49%
WAVE 3	4%	4%	10%	27%	21%	24%	9%	18%	54%
WAVE 4	3%	4%	8%	27%	22%	27%	9%	15%	58%

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I like to meet visitors in my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	12%	35%	20%	27%	3%	3%	1%	67%	7%
WAVE 2	8%	32%	22%	29%	5%	3%	1%	62%	9%
WAVE 3	11%	29%	21%	29%	4%	4%	2%	61%	10%
WAVE 4	9%	34%	21%	27%	4%	4%	0%	64%	8%
Tourism protects and enhances the natural environment	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	7%	20%	28%	23%	15%	5%	1%	55%	21%
WAVE 2	5%	18%	28%	26%	16%	6%	3%	51%	25%
WAVE 3	5%	16%	24%	29%	16%	7%	3%	45%	26%
WAVE 4	4%	17%	28%	26%	19%	5%	2%	49%	26%
Tourism increases employment opportunities	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	43%	37%	12%	5%	2%	1%	0%	92%	3%
WAVE 2	28%	34%	17%	10%	6%	4%	2%	79%	12%
WAVE 3	32%	40%	16%	8%	2%	2%	1%	88%	5%
WAVE 4	26%	39%	20%	9%	3%	2%	0%	85%	5%
Tourism improves the local economy	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	49%	39%	8%	2%	1%	1%	0%	96%	2%
WAVE 2	36%	39%	15%	6%	3%	2%	1%	90%	6%
WAVE 3	38%	41%	15%	4%	2%	1%		94%	3%
WAVE 4	30%	42%	20%	4%	2%	1%	0%	92%	3%
Tourism improves local investment, development and infrastructure spending in the economy	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	8%	24%	21%	15%	9%	5%	18%	53%	32%
WAVE 2	24%	36%	20%	12%	5%	3%	1%	80%	9%
WAVE 3	23%	34%	21%	13%	5%	3%	1%	78%	9%
WAVE 4	19%	36%	24%	12%	6%	2%	0%	79%	8%
Local transport services are improving	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	0%	3%	5%	45%	20%	17%	10%	8%	47%
WAVE 2	1%	3%	5%	37%	22%	19%	13%	9%	54%
WAVE 3	1%	5%	7%	35%	24%	16%	14%	13%	54%
WAVE 4	3%	7%	13%	26%	26%	17%	9%	23%	52%

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Tourism increases prices for local services and amenities	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	5%	16%	24%	30%	14%	11%	1%	45%	26%
WAVE 2	5%	19%	23%	33%	11%	7%	1%	47%	19%
WAVE 3	7%	19%	26%	31%	11%	5%	1%	52%	17%
WAVE 4	6%	16%	25%	37%	10%	6%	0%	47%	16%
Tourism reduces my ability to access local services and facilities	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	3%	6%	14%	25%	21%	27%	5%	23%	53%
WAVE 2	3%	9%	13%	27%	24%	20%	4%	25%	48%
WAVE 3	4%	9%	17%	28%	19%	18%	5%	30%	42%
WAVE 4	3%	8%	14%	31%	22%	20%	4%	25%	46%
Local infrastructure is improving (e.g. public toilets, car parks, playgrounds, footpaths, cycle paths)	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	1%	4%	12%	26%	27%	19%	11%	17%	57%
WAVE 2	1%	5%	13%	24%	24%	21%	13%	19%	58%
WAVE 3	1%	6%	13%	27%	24%	17%	13%	20%	54%
WAVE 4	8%	18%	20%	20%	20%	10%	5%	46%	35%
Overall, I am very satisfied with my life	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	29%	48%	16%	4%	2%	1%	1%	93%	4%
WAVE 2	26%	49%	16%	5%	3%	1%		91%	4%
WAVE 3	25%	46%	16%	7%	4%	2%	1%	87%	7%
WAVE 4	23%	46%	18%	9%	2%	1%	1%	87%	4%
Overall, I am happy with my lifestyle	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	28%	48%	17%	4%	2%	1%	0%	93%	3%
WAVE 2	24%	51%	17%	4%	4%	1%		92%	5%
WAVE 3	23%	47%	17%	6%	4%	2%	1%	87%	7%
WAVE 4	22%	47%	20%	6%	3%	1%	0%	89%	4%
Overall, I feel very excited about my future	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	12%	33%	25%	20%	7%	3%	1%	70%	11%
WAVE 2	16%	36%	23%	17%	6%	2%	1%	75%	9%
WAVE 3	13%	32%	20%	19%	9%	4%	3%	65%	16%
WAVE 4	10%	28%	25%	25%	7%	3%	2%	63%	12%
Overall, I feel calm and relaxed	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	13%	36%	23%	14%	10%	3%	1%	72%	14%
WAVE 2	14%	38%	25%	11%	9%	3%	1%	77%	13%
WAVE 3	14%	35%	22%	13%	10%	4%	3%	71%	17%
WAVE 4	12%	34%	26%	15%	9%	3%	1%	72%	13%

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Having visitors around helps me feel more strongly connected to my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agree ment	Disagree ment
WAVE 1	8%	24%	19%	32%	9%	6%	2%	51%	17%
WAVE 2	6%	23%	20%	33%	10%	7%	2%	49%	19%
WAVE 3	6%	22%	18%	34%	9%	8%	3%	46%	20%
WAVE 4	7%	19%	19%	38%	8%	7%	2%	45%	17%
Summer/Winter tourism would not be a reason for me to move away from my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	37%	40%	8%	8%	4%	3%	1%	85%	8%
WAVE 2	40%	39%	6%	9%	2%	2%	1%	85%	5%
WAVE 3	32%	39%	9%	10%	5%	3%	2%	80%	10%
WAVE 4	40%	37%	7%	9%	2%	3%	1%	84%	6%
I feel safe in my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	19%	48%	20%	6%	5%	2%	1%	87%	8%
WAVE 2	16%	49%	19%	6%	6%	2%	1%	84%	9%
WAVE 3	16%	44%	22%	8%	7%	2%	2%	82%	11%
WAVE 4	15%	44%	23%	8%	6%	2%	1%	82%	9%
I feel financially secure living here	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	16%	43%	23%	10%	5%	2%	1%	82%	8%
WAVE 2	15%	45%	20%	11%	5%	3%	1%	80%	9%
WAVE 3	13%	40%	21%	12%	8%	4%	3%	74%	15%
WAVE 4	10%	40%	23%	13%	7%	4%	2%	73%	13%
I dislike living here	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	1%	1%	4%	6%	10%	36%	43%	6%	89%
WAVE 2	1%	3%	5%	8%	10%	34%	39%	9%	83%
WAVE 3	1%	2%	4%	8%	11%	34%	39%	7%	84%
WAVE 4	2%	2%	4%	9%	11%	35%	37%	8%	83%
My local area is tranquil, peaceful and calm	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	10%	26%	33%	14%	11%	4%	1%	69%	16%
WAVE 2	10%	30%	30%	14%	12%	4%	2%	70%	18%
WAVE 3	8%	25%	30%	15%	14%	6%	3%	63%	23%
WAVE 4	10%	23%	33%	16%	12%	4%	3%	66%	19%

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I live in a beautiful area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	29%	33%	20%	9%	6%	2%	1%	82%	9%
WAVE 2	30%	35%	21%	7%	5%	2%	1%	86%	8%
WAVE 3	26%	33%	21%	10%	5%	3%	1%	80%	9%
WAVE 4	25%	34%	24%	8%	6%	2%	1%	83%	9%
I feel strongly connected to my local area (1-3 MORE)	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	14%	26%	25%	26%	5%	4%	1%	65%	10%
WAVE 2	14%	29%	22%	25%	5%	4%	2%	65%	11%
WAVE 3	12%	24%	21%	31%	5%	5%	2%	57%	12%
WAVE 4	20%	37%	22%	13%	5%	2%	1%	79%	8%

The number of visitors in my local area has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot	Increased	Decreased
WAVE 1	17%	14%	28%	16%	25%	31%	41%
WAVE 2	15%	12%	27%	11%	36%	27%	47%
WAVE 3	16%	19%	40%	12%	14%	35%	26%
WAVE 4	11%	22%	55%	7%	5%	33%	12%
The number of residents using local attractions and facilities has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot		
WAVE 1	12%	17%	31%	17%	23%	29%	40%
WAVE 2	14%	16%	26%	10%	34%	30%	44%
WAVE 3	14%	25%	40%	12%	9%	39%	21%
WAVE 4	8%	28%	53%	8%	3%	36%	11%
The number of cultural attractions available to visit (exhibitions, events) has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot		
WAVE 1	1%	10%	25%	20%	44%	11%	64%
WAVE 2	1%	6%	21%	11%	61%	7%	72%
WAVE 3	3%	15%	42%	26%	15%	18%	41%
WAVE 4	4%	22%	50%	19%	5%	26%	24%
Given the impact that COVID-19 has had on local tourism, the quality of life for residents has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot		
WAVE 1	1%	11%	40%	31%	16%	12%	47%
WAVE 2	2%	12%	37%	29%	19%	14%	48%
WAVE 3	3%	15%	52%	24%	7%	18%	31%
WAVE 4	2%	18%	50%	24%	6%	20%	30%

The availability of recreation facilities and opportunities has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot	Increased	Decreased
WAVE 1	1%	5%	24%	36%	35%	6%	71%
WAVE 2	1%	5%	20%	26%	48%	6%	74%
WAVE 3	3%	15%	42%	31%	9%	18%	40%
WAVE 4	3%	23%	48%	21%	6%	26%	27%
This summer/winter, the number of cultural and recreational activities I have taken part in has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot		
WAVE 1	1%	6%	10%	20%	64%	7%	84%
WAVE 2	2%	6%	11%	14%	67%	8%	81%
WAVE 3	4%	18%	20%	30%	28%	22%	58%
WAVE 4	3%	23%	31%	29%	14%	26%	43%

I support summer/winter tourism in my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	28%	41%	19%	8%	2%	1%	1%	88%	4%
WAVE 2	27%	39%	19%	11%	2%	1%	1%	85%	4%
WAVE 3	27%	39%	19%	11%	2%	1%	1%	85%	4%
WAVE 4	27%	40%	18%	13%	1%	1%	0%	85%	2%

This summer/winter I...	Stayed at home because of COVID-19	Would always have stayed at home	Went on vacation outside of Kent as I normally would	Went on vacation outside of Kent because of COVID-19	Went on vacation within Kent
WAVE 1	63%	5%	20%	6%	6%
WAVE 2	91%	7%	1%	1%	
WAVE 3	45%	8%	34%	6%	7%
WAVE 4	51%	21%	20%	1%	6%

Since COVID-19, has your household's financial situation:	Improved	Stayed the same	Worsened slightly	Worsened significantly
WAVE 1	9%	55%	27%	9%
WAVE 2	16%	55%	22%	8%
WAVE 3	15%	55%	22%	9%
WAVE 4	10%	50%	31%	10%

Please tell us what you think is the main attraction for visitors in your local area	Coast/Beaches	Countryside	Shopping	Outdoor Attractions	Museums/Historic sites/Buildings	Cultural Attractions	Food and Drink	Other
WAVE 1	42%	17%	8%	3%	28%			3%
WAVE 2	34%	23%	7%	4%	27%			5%
WAVE 3	38%	17%	7%	3%	29%			7%
WAVE 4	35%	21%	5%	3%	28%	3%	3%	3%

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Looking to future travel, which of the following statements describes your travel plans? Please select all that apply. I will take more day trips in England in 2022	%
I will take more day trips in England in 2022	47%
I will take more short breaks/holidays in England in 2022	61%
I will take more day trips in Kent in 2022	54%
I will take more short breaks/holidays in Kent in 2022	16%
I will go back to travelling abroad as much as I did before COVID in 2022	29%
None of the above	5%
If you were planning a future day trip or overnight stay in Kent to explore your local area further, which of these resources would you be likely to use to plan your visit?	%
Visit a Kent destination website (e.g., www. visitkent.co.uk, www.explorekent.org, www. whatsoninkent.com, www.kentdowns.org.uk)	57%
Visit review websites (e.g. TripAdvisor, Booking.com, Expedia)	47%
Visit the specific attractions websites (e.g. National Trust, Chatham Historic Dockyard etc.)	67%
Visit a landscape or wildlife information site (e.g., www.kentdowns.org.uk; www.kentwildlifetrust.org.uk, Woodland Trust or RSPB)	35%
Use a travel guide or tour operator app (e.g. Explore Kent)	11%
Use a specific attraction app (e.g. Leeds Castle, Canterbury City Guide)	26%
Look through destination brochures and leaflets	18%
Read an article in a magazine or newspaper	23%
Look for recommendations on social media	25%
Opinions of bloggers and influencers	2%
Ask friends and family for recommendations/friend and family made recommendations	40%
Visit the Tourist Office	12%
Other	4%

Do you think any changes you have made to your leisure travel behaviour are long term/permanent changes, or do you think you will return to pre-COVID behaviours in a year or two?	%
I have not changed my holiday plans or choices as a result of COVID	18%
I have made some changes, but they are just short-term, and I will return to preCOVID holiday choices in the next year or two	52%
I have made some changes to my holiday plans in the short-term, and they are likely to influence my holiday plans long into the future	30%

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Looking at the following statements, which one best describes your working patterns considering the COVID-19 pandemic?	%
I have always travelled to work, and I have continued to do so over the pandemic	36%
I have always worked from home	12%
Since the pandemic, my organisation introduced working from home measures, but I have now returned to the workplace full-time	7%
Since the pandemic, my organisation introduced working from home and hybrid measures that are continuing, and this is now combined with days at the workplace	30%
Prior to the pandemic, I had already began working in a more hybrid way (for example working from home on certain days)	8%
Other	6%

When working from home, I use more local cafes and shops	%
Strongly agree	11%
Agree	17%
Somewhat agree	15%
Neither agree nor disagree	15%
Somewhat disagree	10%
Disagree	22%
Strongly disagree	11%

When working from home, I access outdoor green spaces for walks or cycling more frequently.	%
Strongly agree	27%
Agree	26%
Somewhat agree	16%
Somewhat disagree	20%
Disagree	8%
Strongly disagree	3%

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